

DATA

The fisheries and aquaculture sector in France – Data 2024

Production - Firms - Trade - Consumption

SUMMARY



Production page 2

France in the EU-28 & in the world in 2022
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

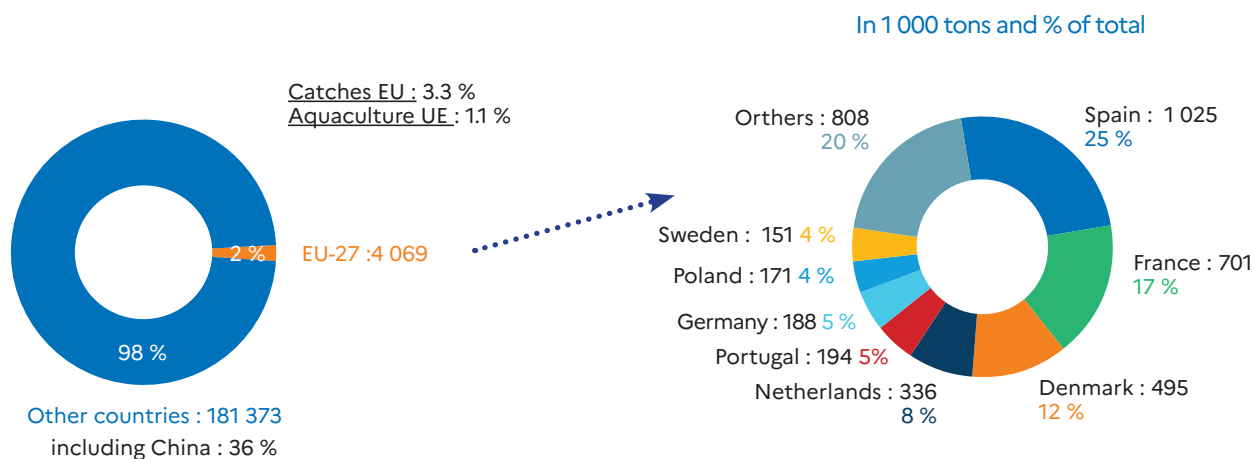
FISHING FLEET / AQUACULTURE FIRMS / JOBS

Total sales of fisheries and aquaculture products



• Total sales / metropolitan France and overseas territories

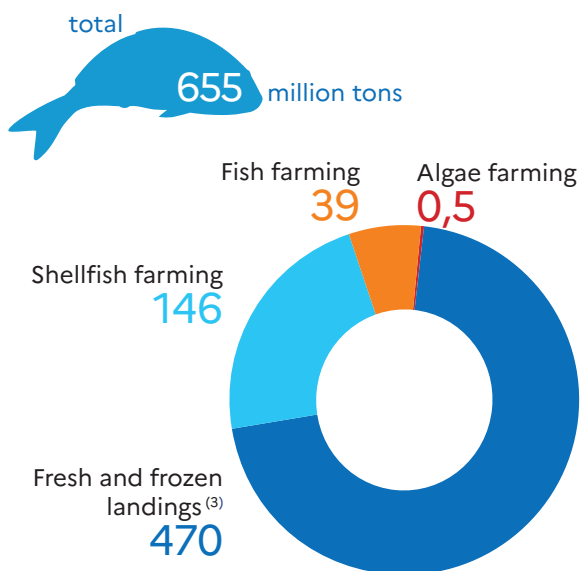
France in the EU-28 and in the world in 2022



Source : Eurostat and FAO

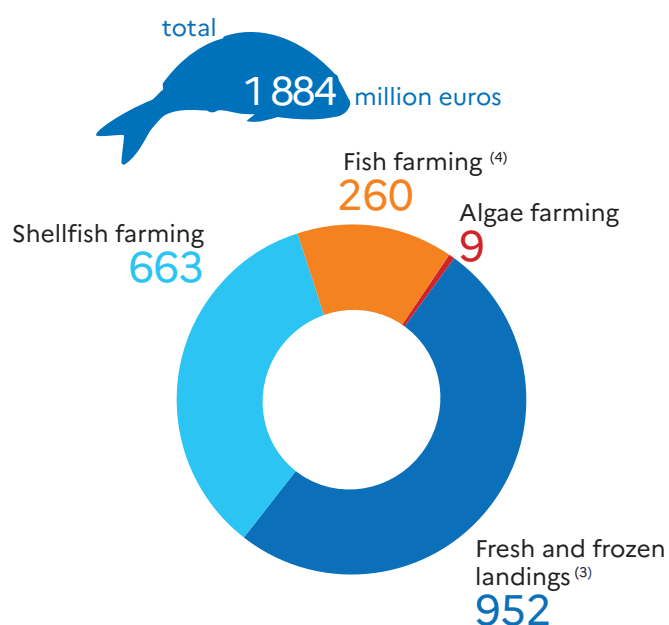
Quantities sold in 2023 ^{(1) (2)}

by method of production (1 000 tons)



Values of sales in 2023

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

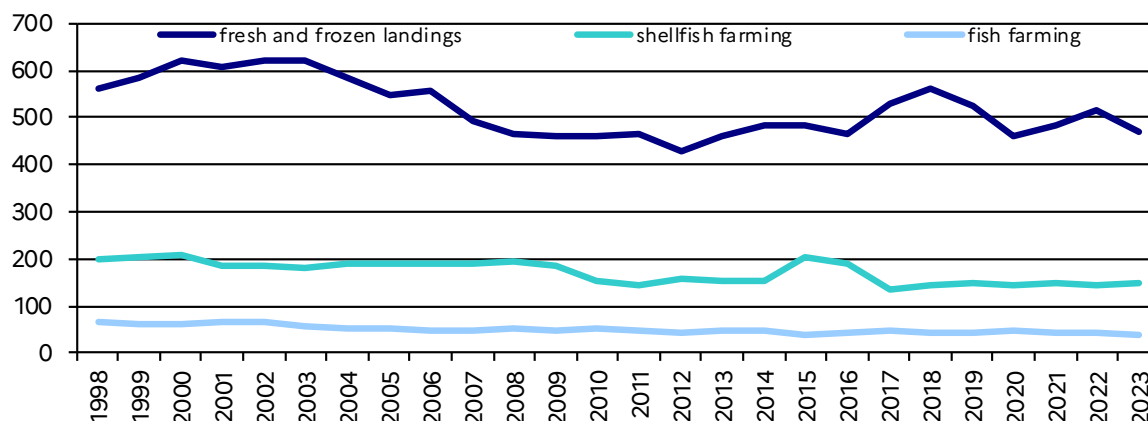
(4) Marine and continental

Source : MASA / DGAMPA / Eumofa / FAO

• Total sales / metropolitan France and overseas territories

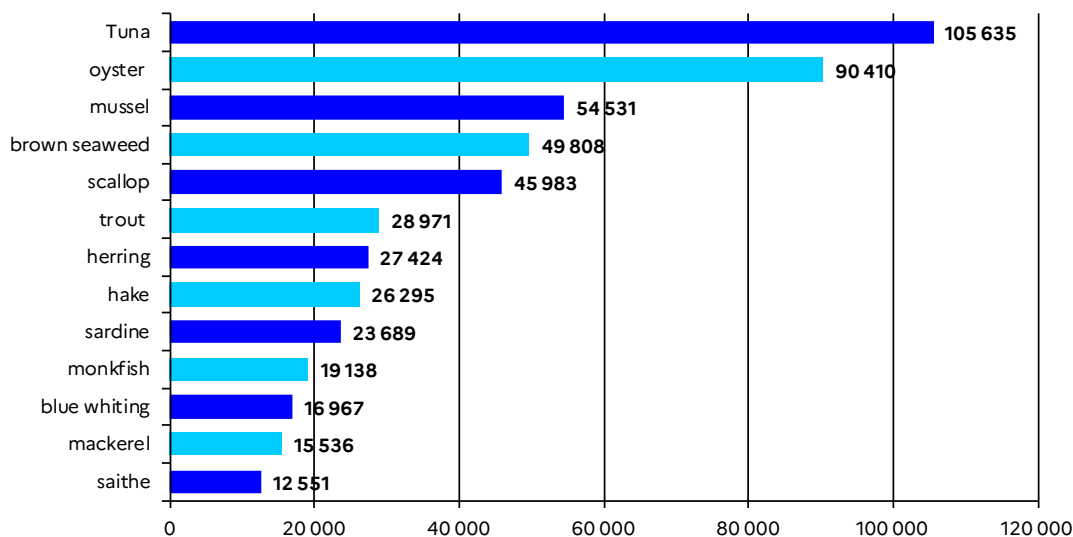
Changes in quantities sold in metropolitan France ⁽¹⁾

(1 000 tons) ⁽²⁾



Main species sold in metropolitan France in 2023 ⁽²⁾

(in tons)



(1) Including seaweeds

(2) Equivalent live weight

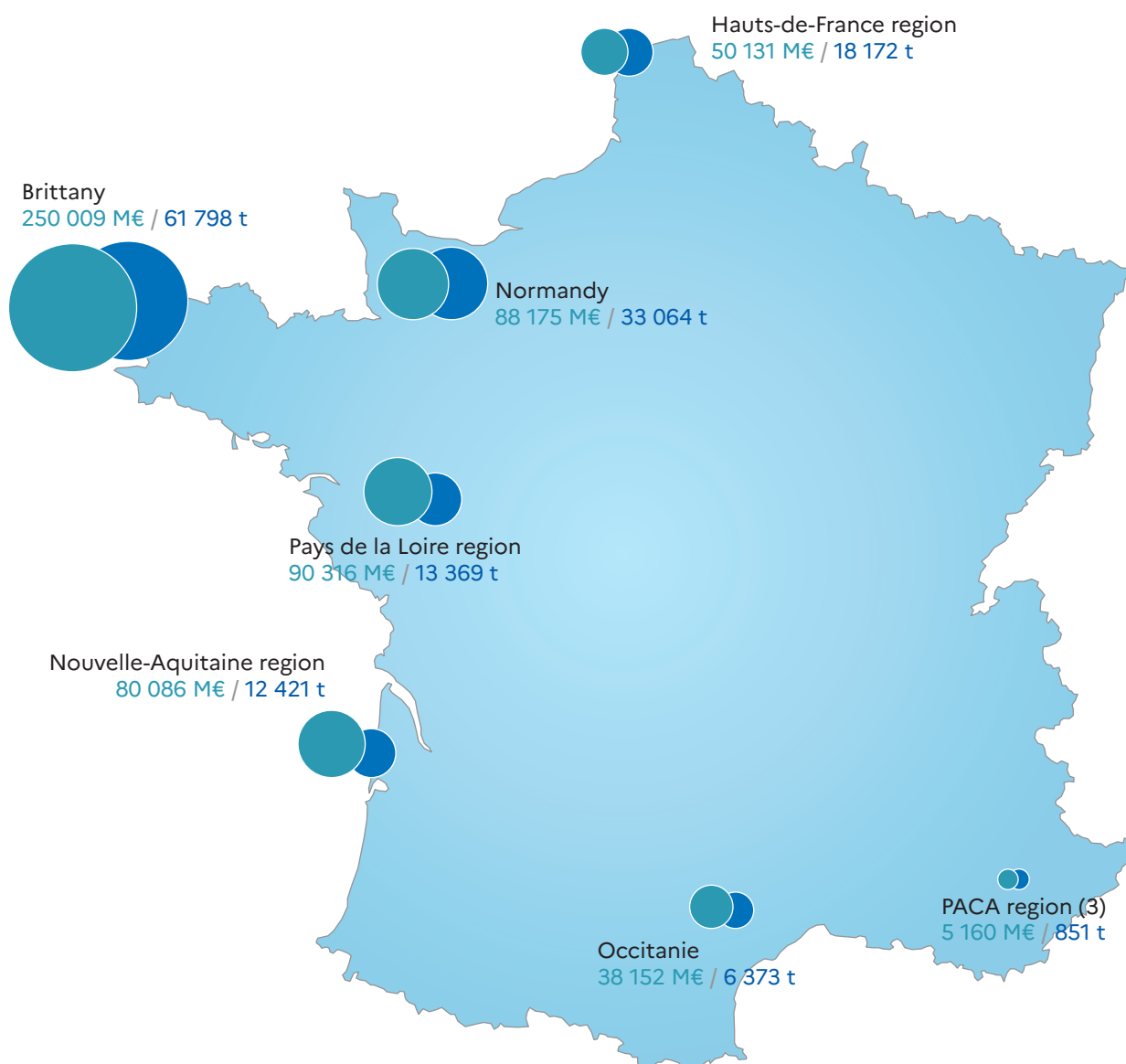
Source : MASA / DGAMPA

• Sales of fishery products

Fresh and frozen landings by region in 2024 ⁽¹⁾

Sales

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



(1) Excluding seaweeds and freshwater fishing

(2) In net weight

(3) Off-auction sales + auctions in the Var and Bouches-du-Rhône

Source : FranceAgriMer / VISIOMer

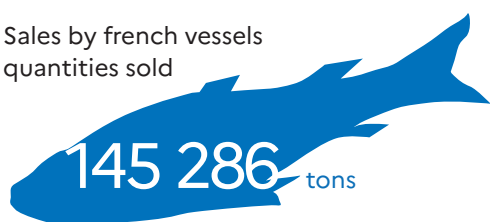
• Sales of fishery products

Sales of fishery products at auction in 2024

Number of auctions in 2024 : **34**

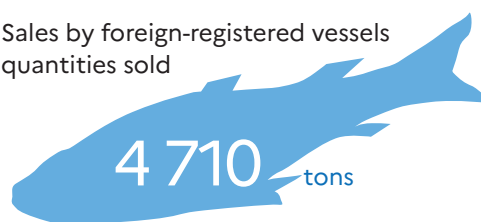


Sales by french vessels
quantities sold



Value of sales **597** million euros

Sales by foreign-registered vessels
quantities sold

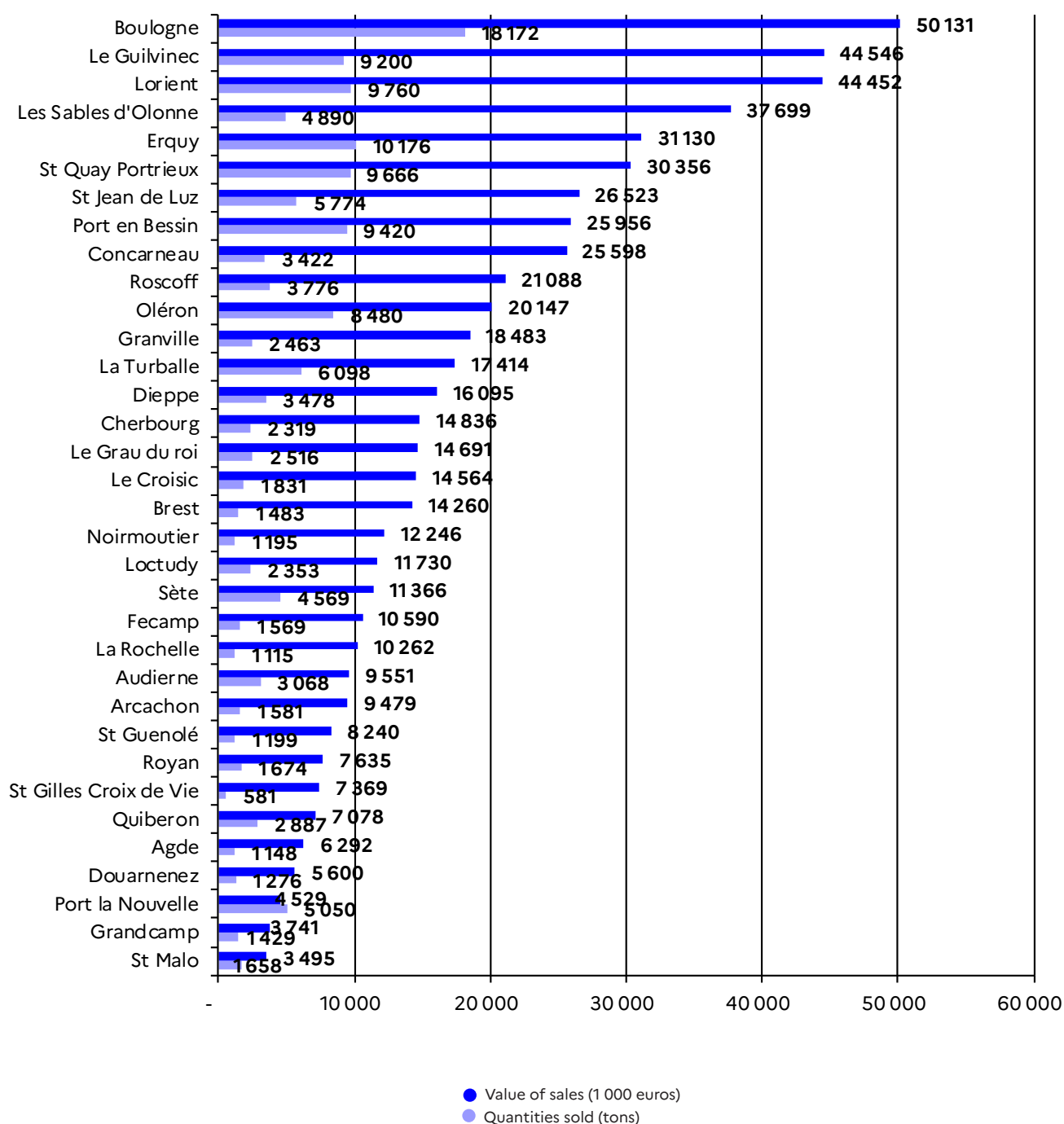


Value of sales **15** million euros

Source : FranceAgriMer / VISIOMer

• Sales of fishery products

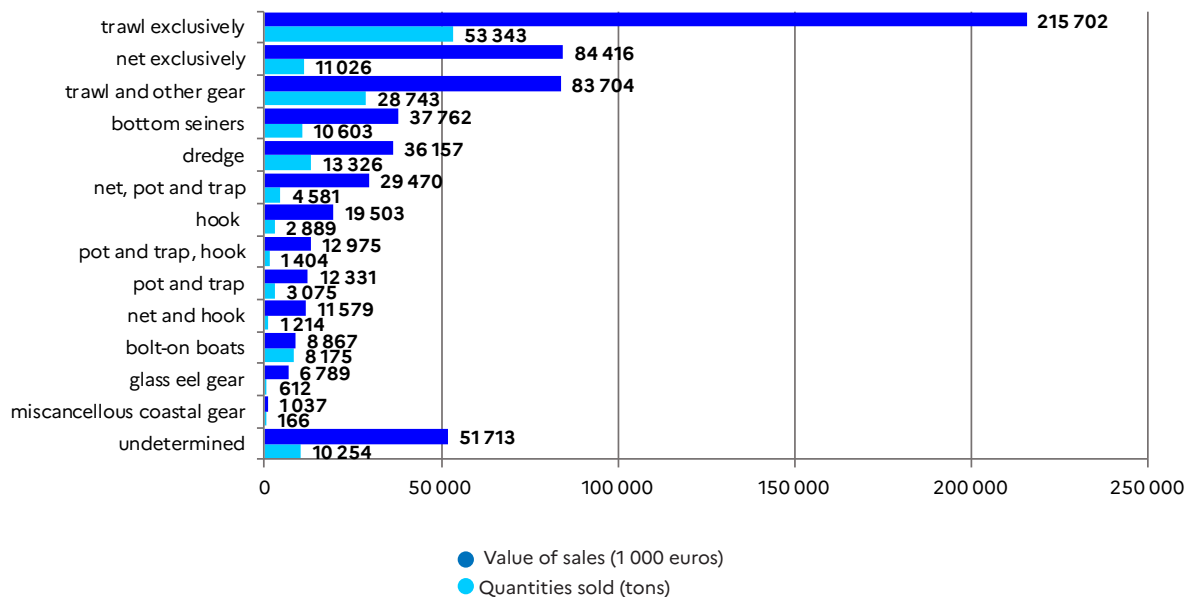
Quantities sold and value of sales by french vessels at auctions in 2024



Source : FranceAgriMer / VISIOMer

• Sales of fishery products

Breakdown of quantities sold and value of sales at auction in 2024 by fleet segment ⁽¹⁾



Number of french vessels (sales at auction in 2024) ⁽¹⁾

Pot and trap exclusively	123
Net and hook	121
Trawl exclusively	325
Trawl and other gear	415
Miscellaneous coastal gear	35
Dredge	304
Net exclusively	285
Net, pot and trap	264
Net and hook	83
Hook exclusively	137
Glass eel gear	159
Seiners	39
Undetermined	472
Total	2 814

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

Sources : FranceAgriMer / VISIOMer, Ifremer

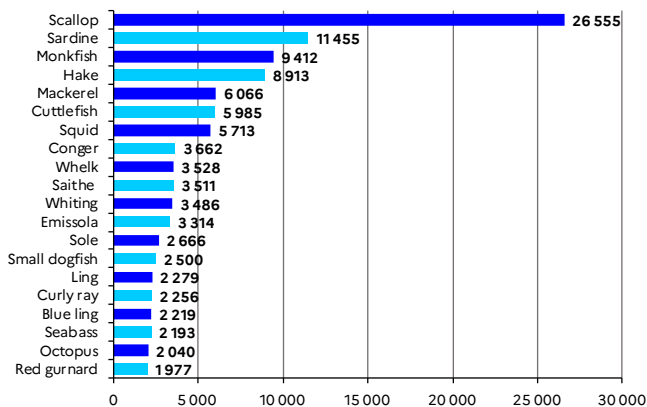
• Sales of fishery products



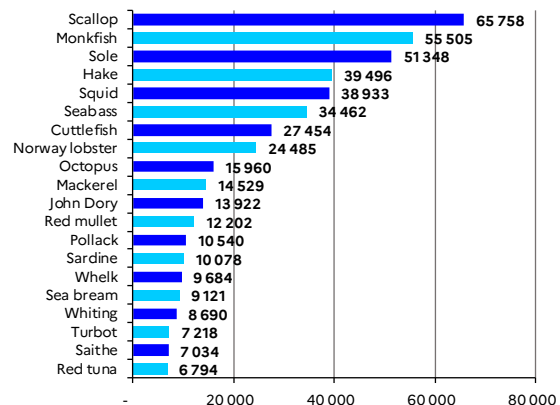
PRODUCTION

Main species sold at auction by french vessels in 2024

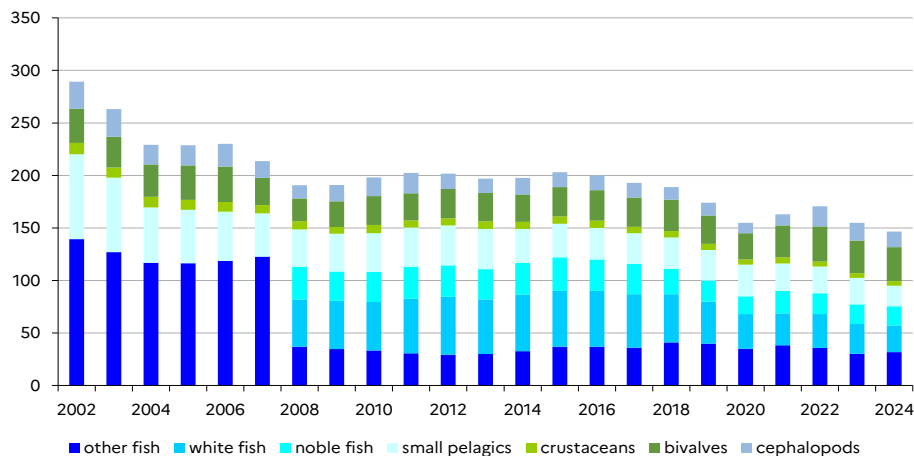
Quantities sold (in tons)



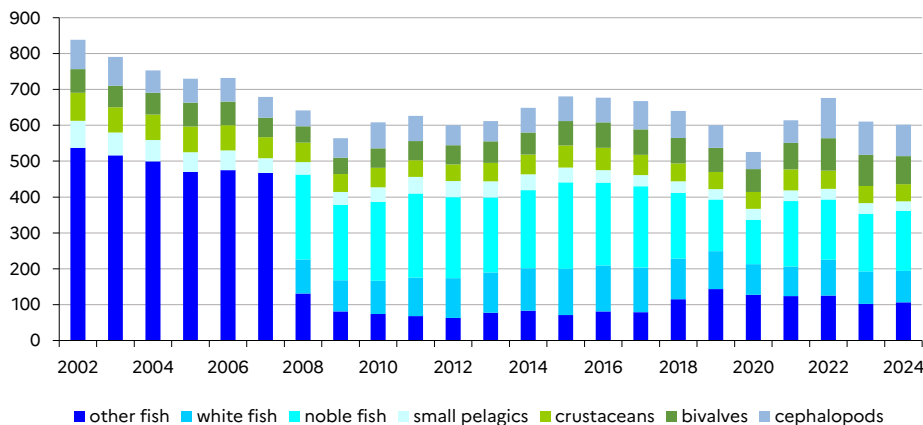
Value of sales (1 000 euros)



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)



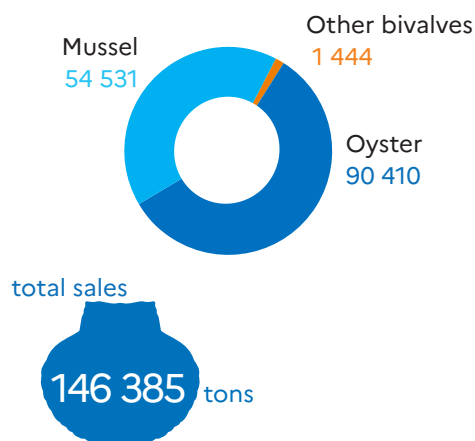
(1) Quantities declared by French vessels

Source : FranceAgriMer / VISIOMer

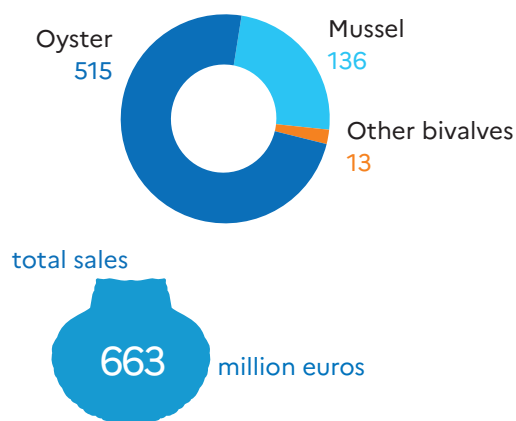
• Sales of aquaculture products in metropolitan France

Shellfish farming 2023

Quantities sold for consumption (in tons)⁽¹⁾

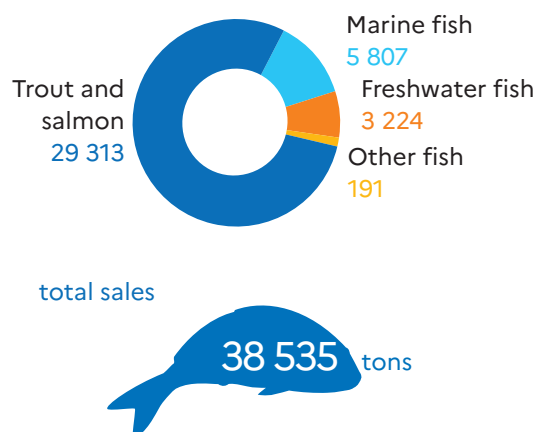


Value of sales (1 000 euros)

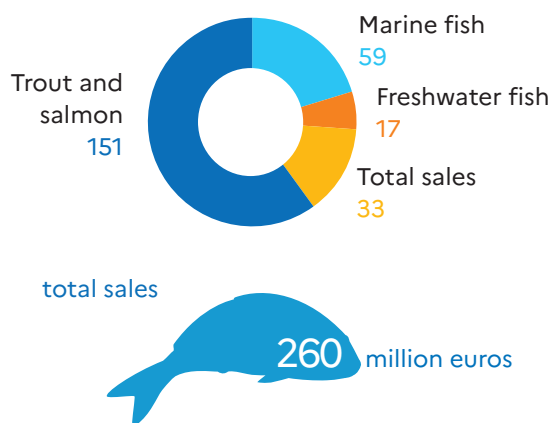


Fish farming 2023

Quantities sold for consumption (in tons)⁽¹⁾

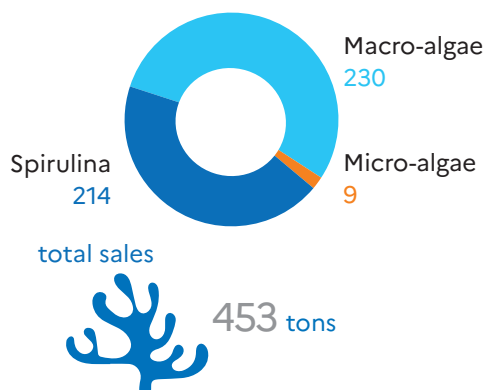


Value of sales (1 000 euros)

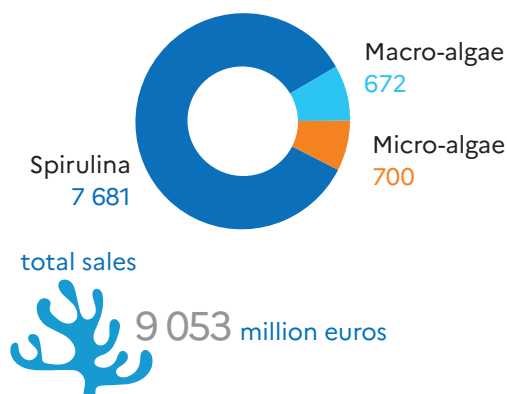


Algae farming 2023

Quantities sold for consumption (in tons)⁽¹⁾



Value of sales (million euros)



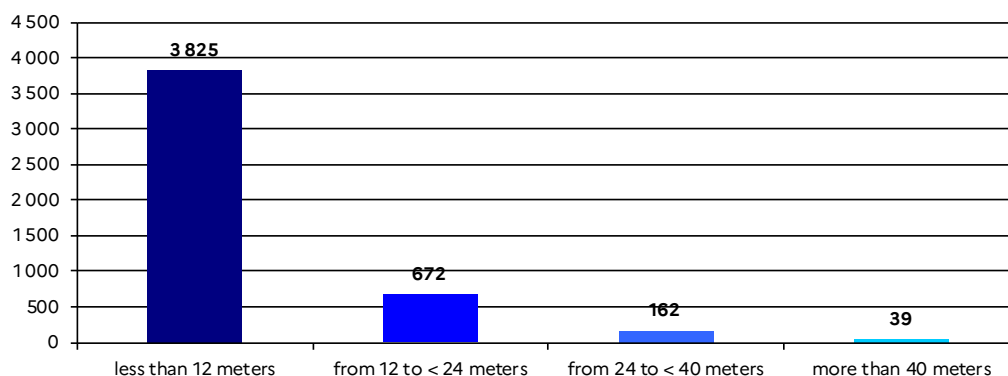
(1) Equivalent live weight

Source : DGAMPA Agreste data - Annual survey from SSPP

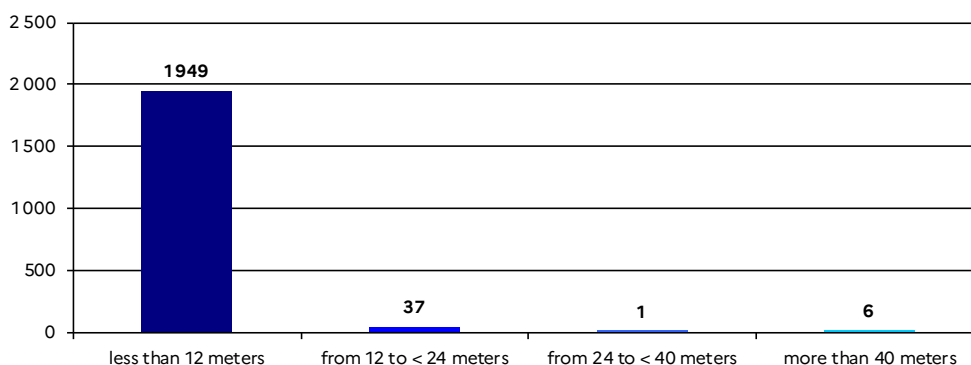
• Fishing fleet

Fishing fleet ⁽¹⁾

Number of ships by length in 2023 (metropolitan france)

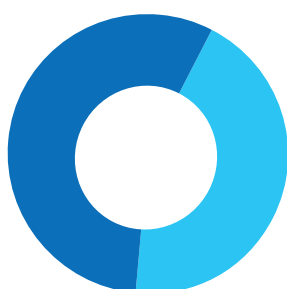


Number of ships by length in 2023 (french overseas territories)



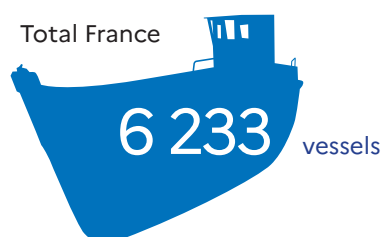
Metropolitan France

4 240



Overseas territories
1 993

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

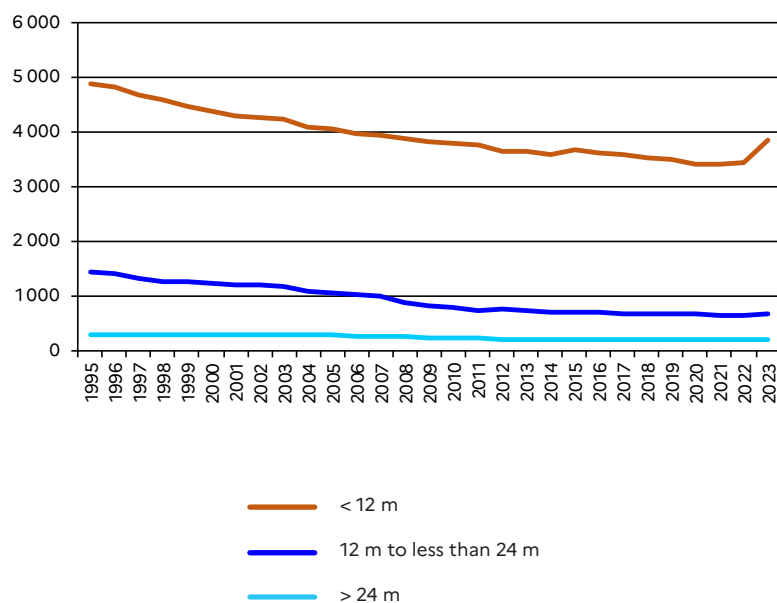
vessels over 1 000 GRT (gross register tonnage) or vessels over 150 GRT if out of port more than 20 days

(1) Ships whose type of navigation is not indicated are not taken into account.
Please note: this data includes all vessels registered in France, including inactive vessels.

Source : Fleet file from IFREMER 2024

• Fishing fleet / Aquaculture firms

Changes in the number of fishing vessels in metropolitan France



Source : Fleet file from IFREMER 2023

	< 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
2023	3 825	672	201

Aquaculture firms in 2023

Shellfish farming - including seaweed and shrimps	2 597
Marine fish farming and sturgeon	38
Continental salmonids farming	330
Algae farming	224

Source : DGAMPA Agreste data - Annual survey from SSP

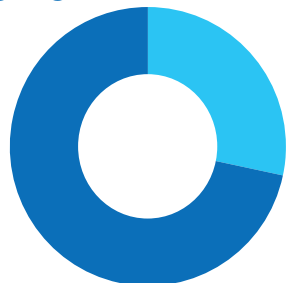
• Jobs



PRODUCTION

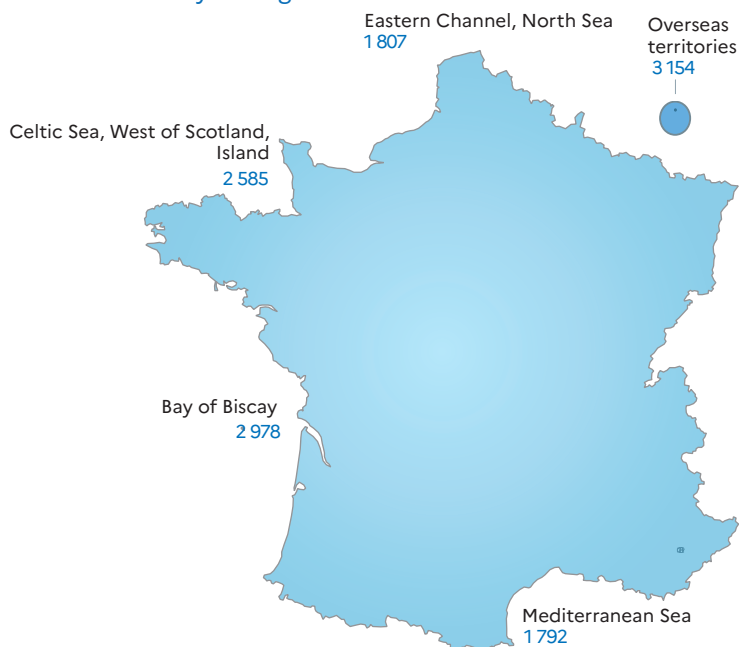
Number of seamen employed on board french fishing vessels in 2022 (seamen of all nationalities)

Metropolitan France
9 162



Overseas territories
3 154

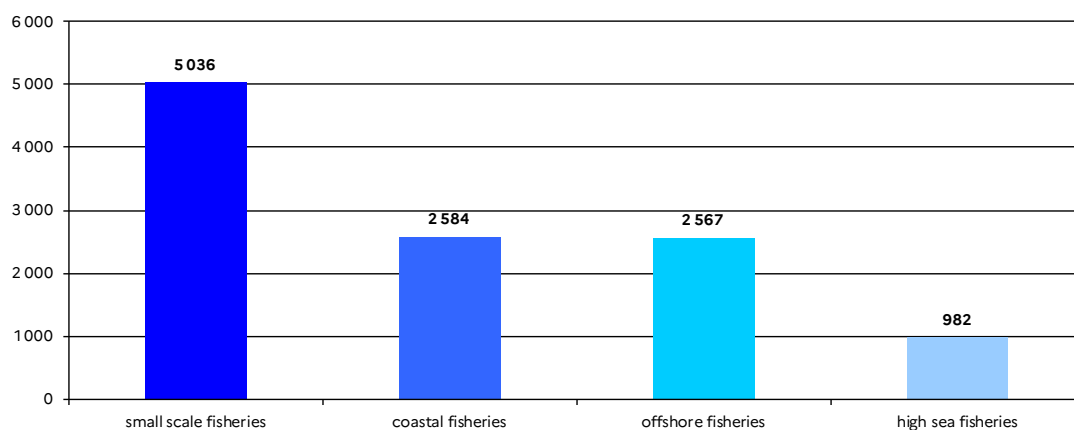
Breakdown by fishing area



Total France



Metropolitan france (1)



Number of full time equivalent jobs in 2023

	Jobs	FTEJ
Shellfish farming	18 100	9 830
Fish farming	3 078	2 189
Algae farming	585	451

Source : Agreste SSP data and OECD statistics

(1) Data 2023



FIRMS

FISHMONGERS / TRADING / PROCESSING

By sales / By region



• Fishmonger firms



FIRMS

Fishmonger's in 2022

Number of establishments



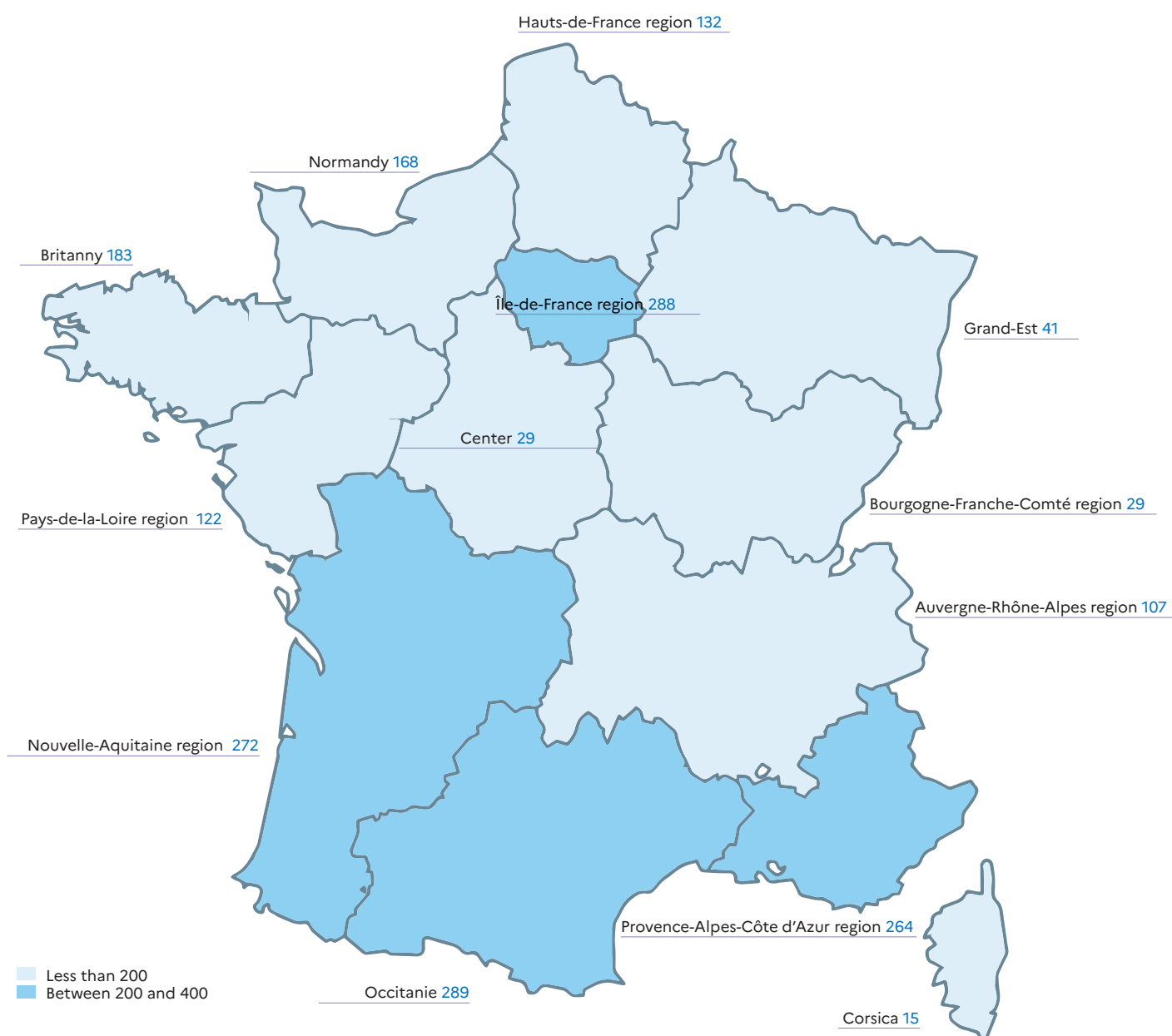
Hand sales



Full time equivalent jobs



Number of establishments per region



Source : ViaAqua and Protéis for FranceAgriMer

• Trading firms

Trading firms in 2023

Number of firms ⁽¹⁾



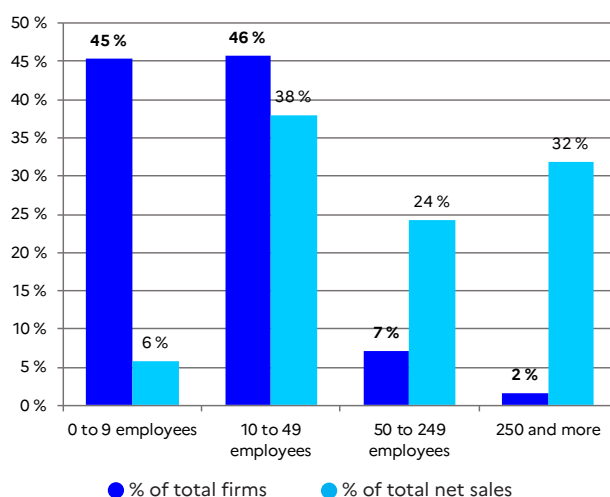
Jobs ⁽¹⁾



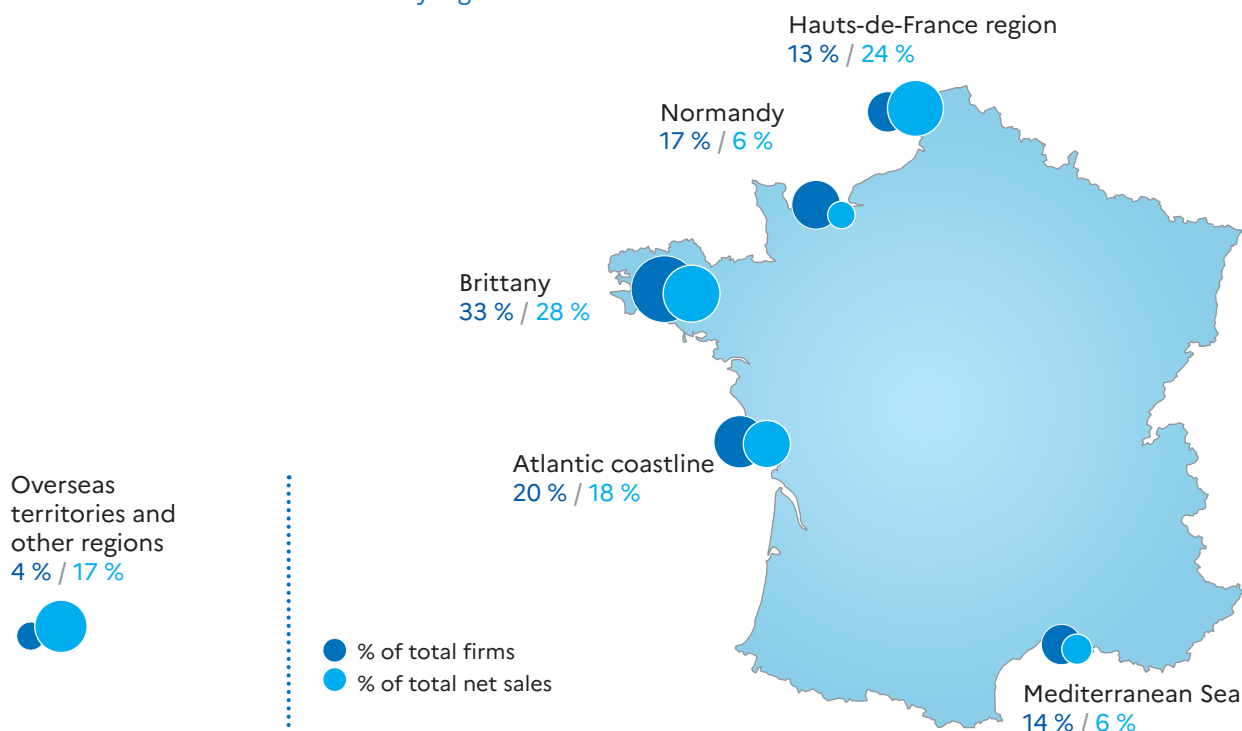
Net sales (million euros) ⁽¹⁾



Breakdown of firms by workforce in 2023



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

Processing main activity firms



FIRMS

Processing main activity firms in 2018

Number of firms



Net sales per firm (million euros) ⁽¹⁾



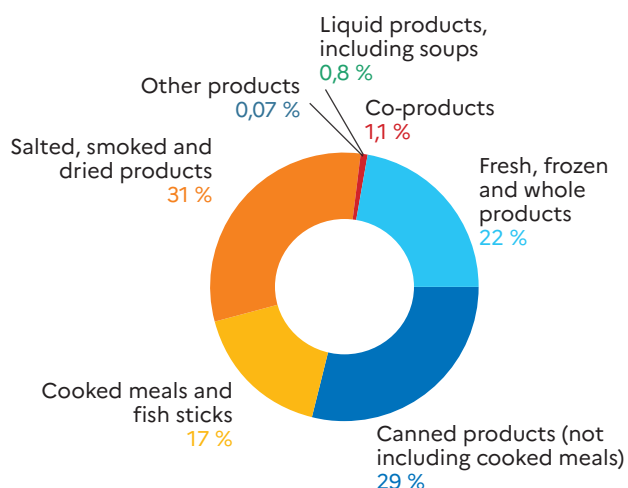
including seafood and fish farming processing



Jobs



Seafood processing net sales ⁽³⁾

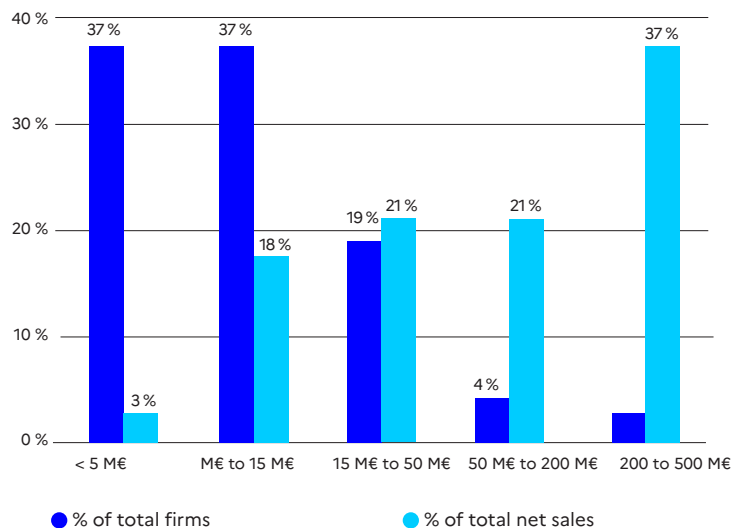


(1) Filleting, cutting, peeling, packaging, surgelation

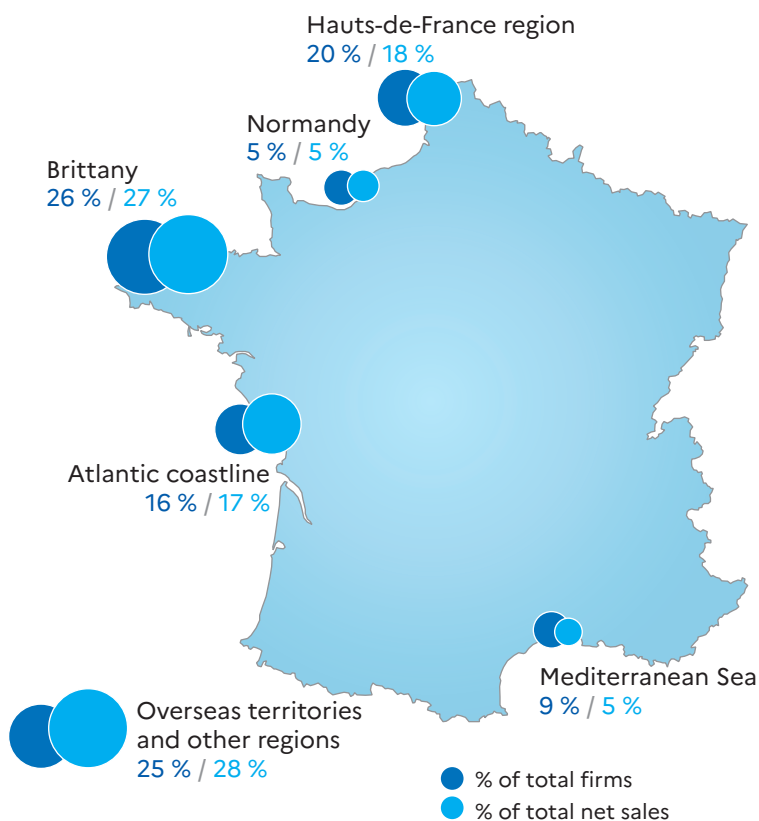
(2) Seaweeds, in fish products, others

(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



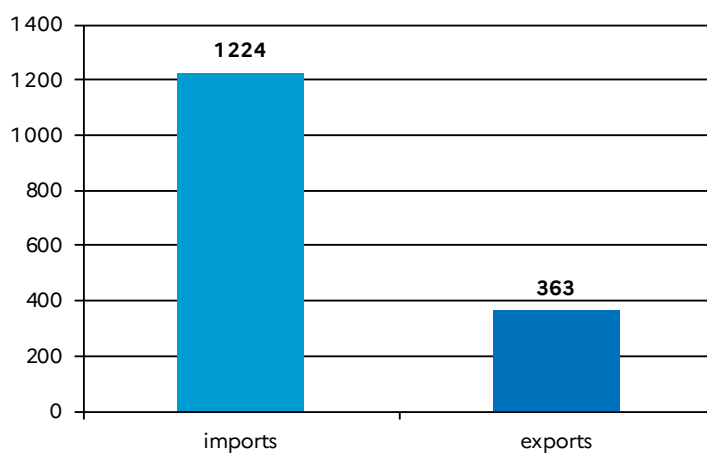
• Supply balance



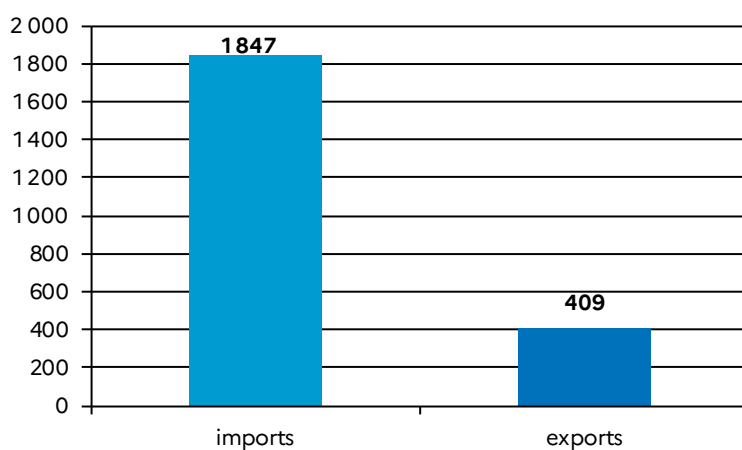
TRADE

Supply balance in 2024

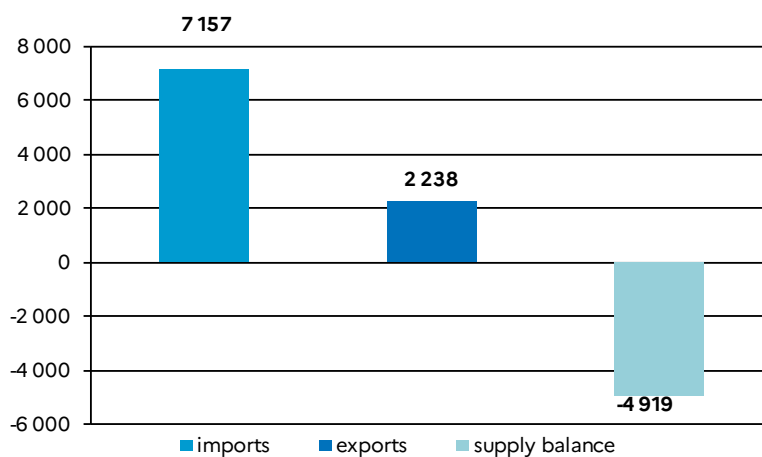
Net weight (1 000 tons)



Live weight (1 000 tons)



Value (million euros)



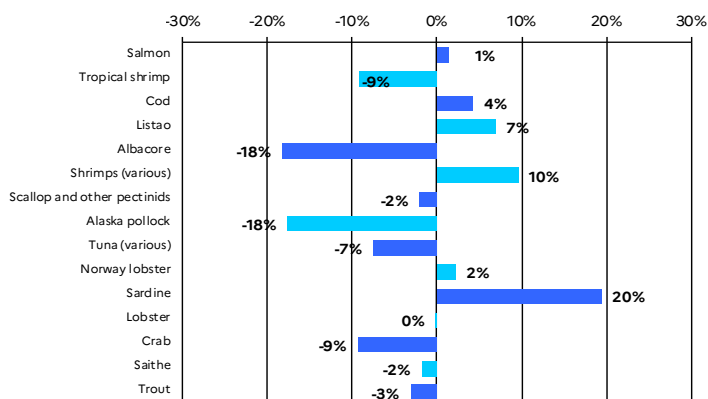
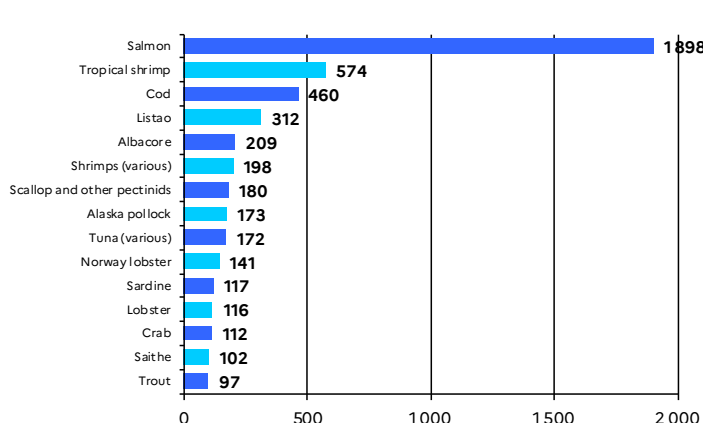
Source : French customs

• Imports and exports / metropolitan France and overseas territories

Imports - main species in 2024

Value (million euros)

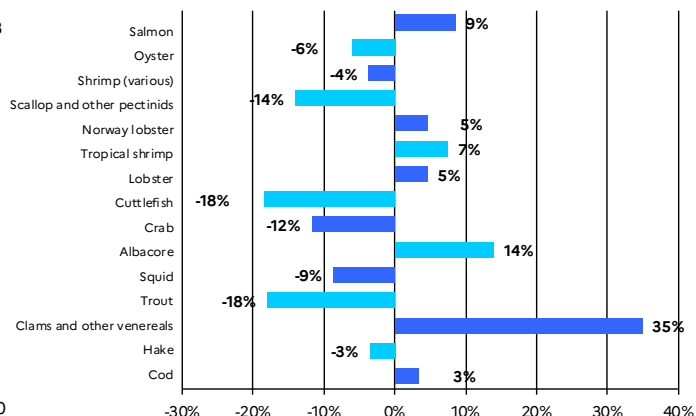
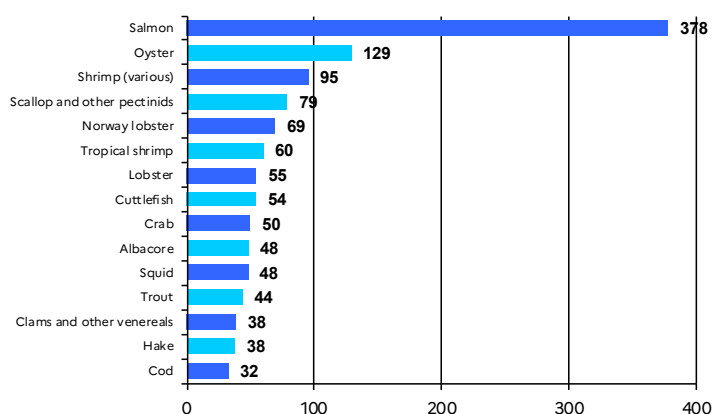
Evolution 2024/23 (en %)



Exports - main species in 2024

Value (million euros)

Evolution 2024/23 (en %)



Source : French customs

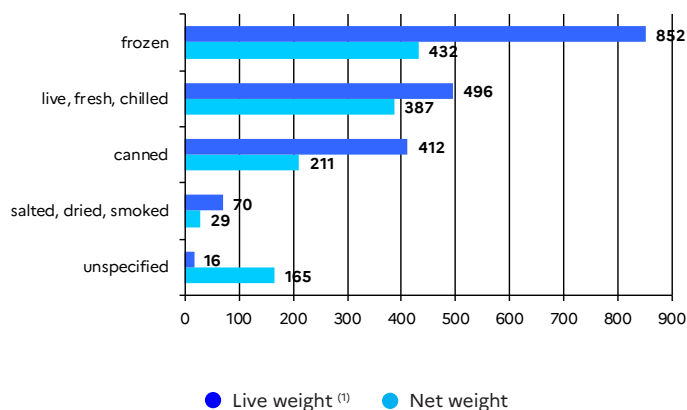
Imports and exports / metropolitan France and overseas territories



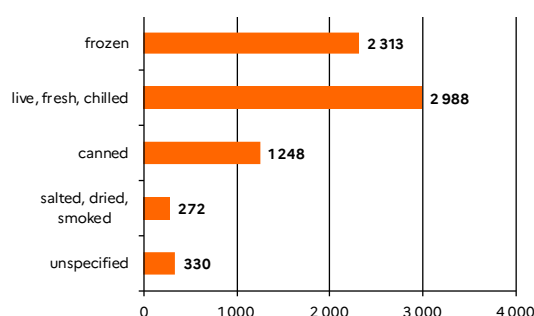
TRADE

Imports by presentation in 2024

Imports by volume (1 000 tons)

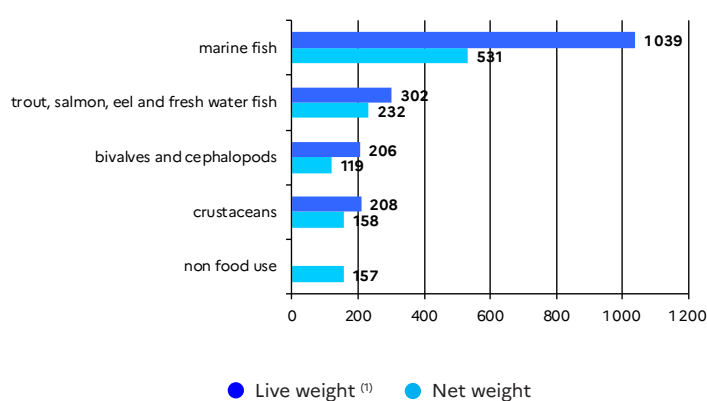


Imports by value (million euros)

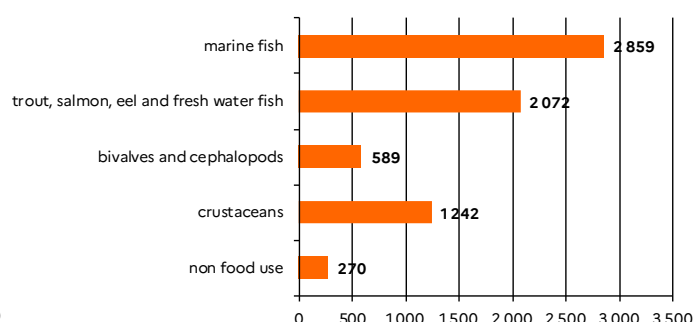


Imports by species group in 2024

Imports by volume (1 000 tons)



Imports by value (million euros)



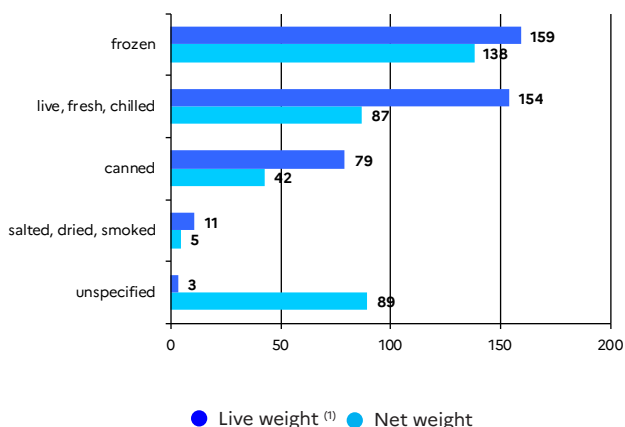
(1) Data collection methodology is detailed on inside back cover

Source : French customs

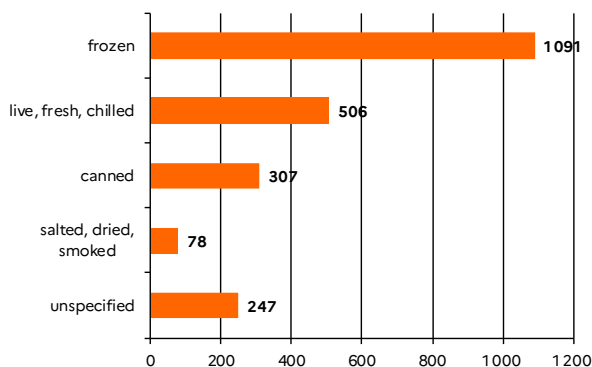
• Imports and exports / metropolitan France and overseas territories

Exports by presentation in 2024

Exports by volume (1 000 tons)

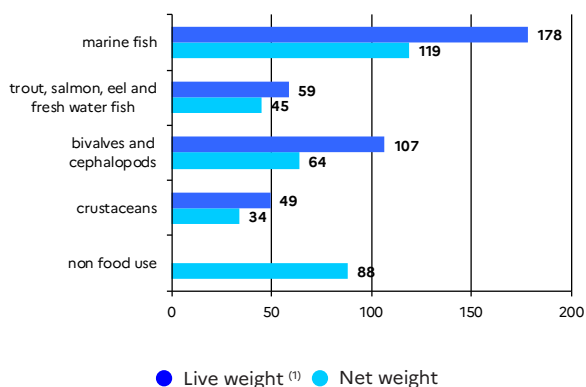


Exports by value (million euros)

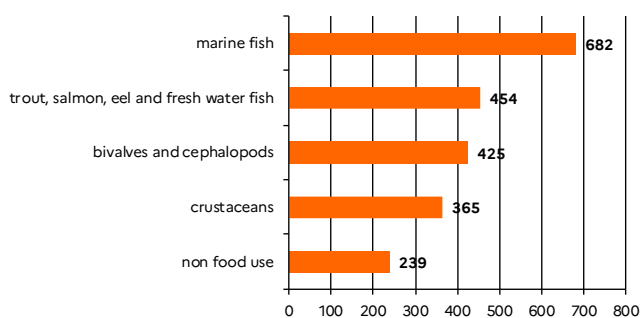


Exports by species group in 2024

Exports by volume (1 000 tons)



Exports by value (million euros)



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

Source : French customs

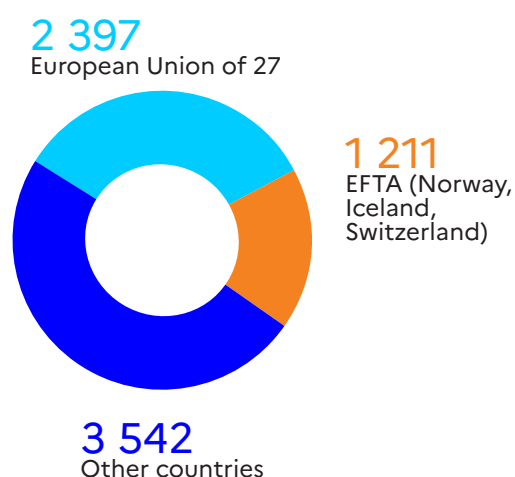
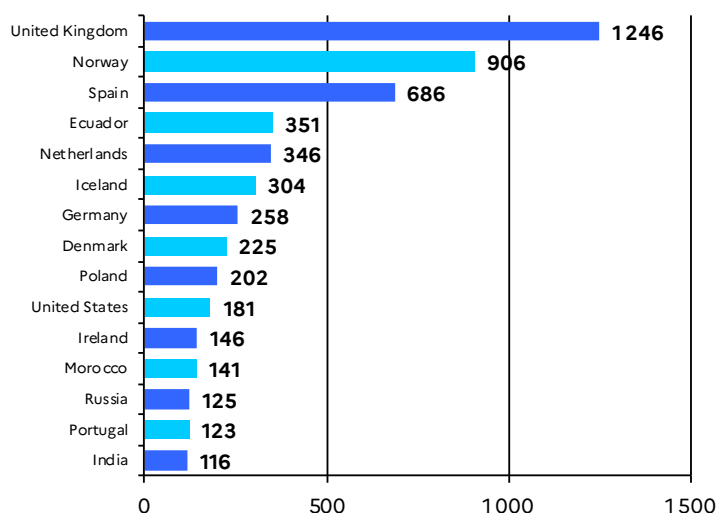
Imports and exports / metropolitan France and overseas territories



TRADE

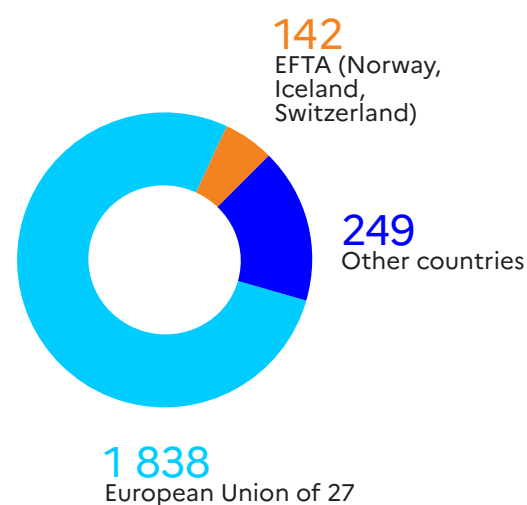
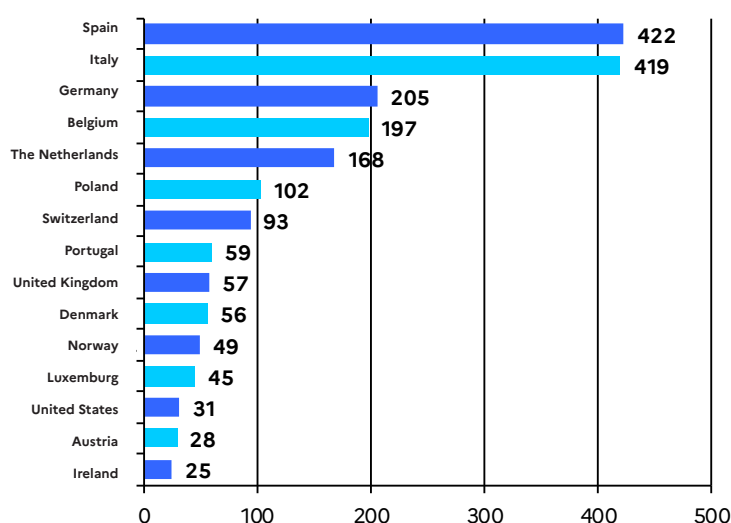
Imports of aquatic products by geographical origin in 2024

Value (millions euros)



Exports of aquatic products by destination in 2024

Value (million euros)



Source : French customs



CONSUMPTION

SUPPLY BALANCE / PURCHASES

Households / Catering / Breakdown of purchases by distribution channel

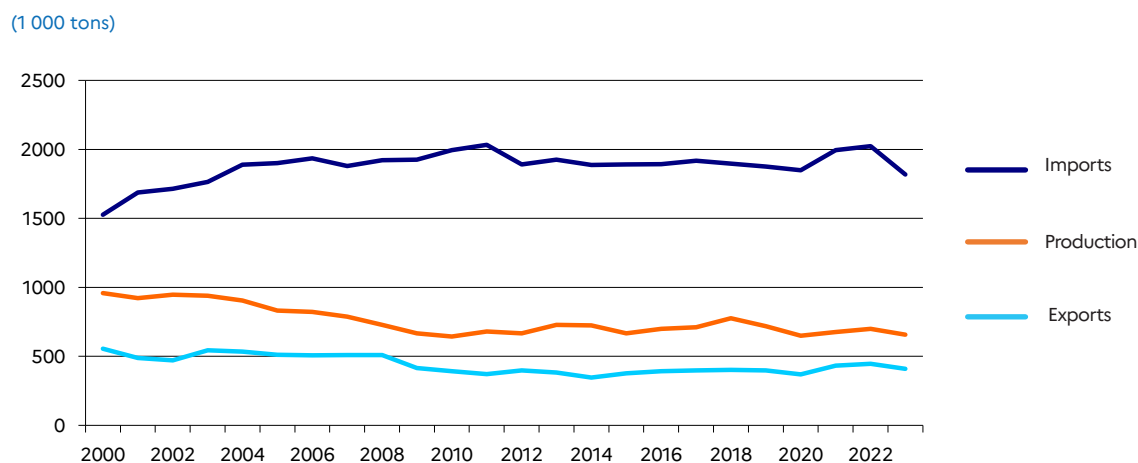


• Supply balance



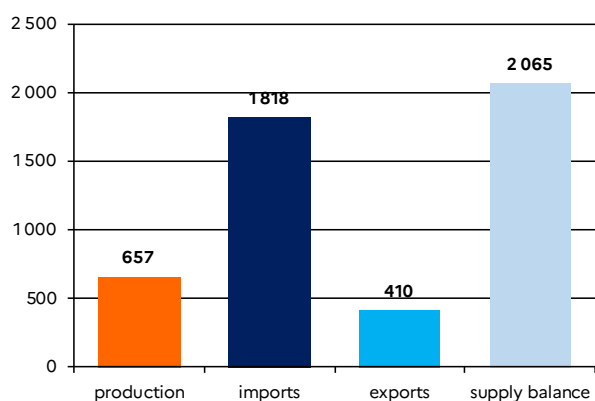
CONSUMPTION

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

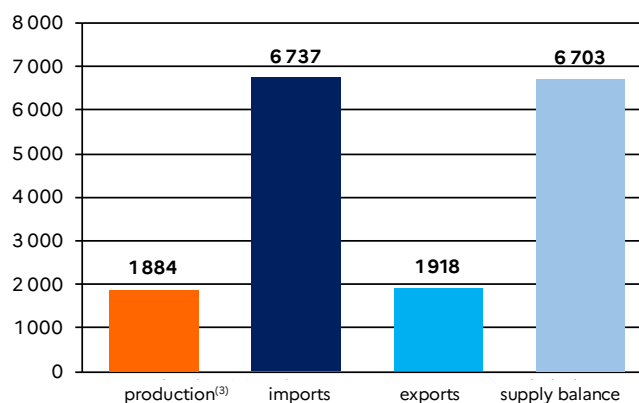


Supply balance in 2023

In volume (1 000 tons)



In value (million euros)

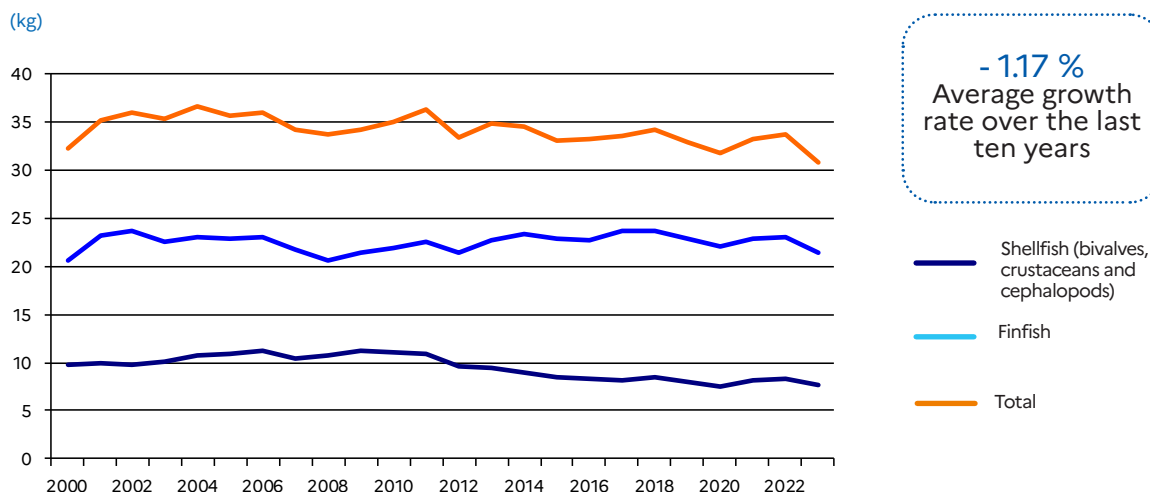


- (1) Data collection methodology is detailed on inside back cover
 (2) Live weight, all products excepting non-food products and algae
 (3) Be careful, sales of French boats are not exhaustive

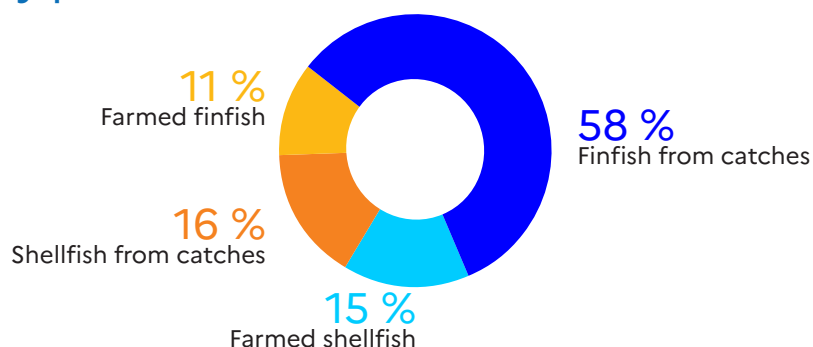
Source: FranceAgriMer

• Supply balance

Changes in supply balance ^{(1) (2) (3)}

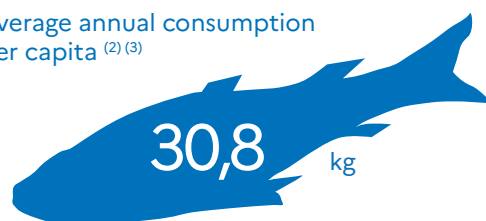


Breakdown by products in 2023 ^{(1) (2)}



Average annual consumption per capita ^{(2) (3)} (kg)	30,8
Fish farming	4,2
Salmon	3,5
Farmed shellfish and finfish	4,6
Mussel	1,8
Oyster	1,2
Shrimp	1,4
Finfish and shellfish from catches ⁽⁴⁾	2,4
Scallop	0,7
Fish from catches	16,6
Tuna	4,7
Cod	1,7
Alaska pollock	2,4
Sardine	0,9
Hake	0,8
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.

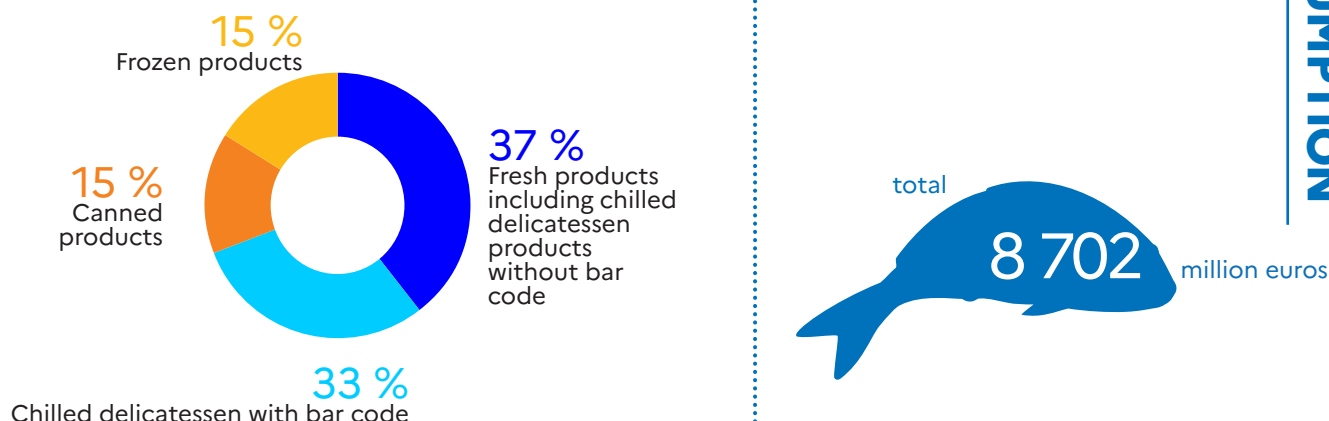
(1) Data collection methodology is detailed on inside back cover
 (2) Equivalent live weight
 (3) Excepting seaweed and non-food use products
 (4) Crustaceans include cephalopods

Households purchases

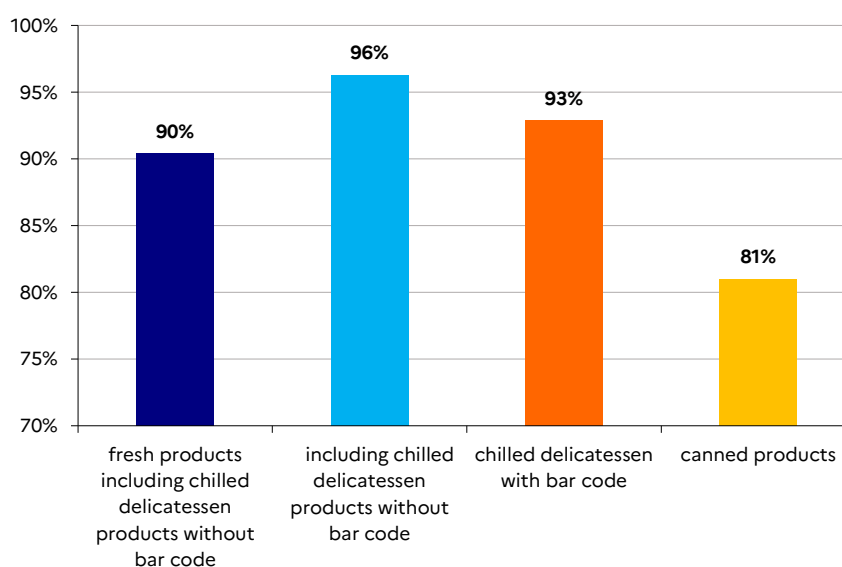


CONSUMPTION

Households spending for aquatic products in 2024 ⁽¹⁾



Percentage of purchasing households in 2024 ⁽²⁾



Households consumption over 10 years

	2015		2024		Evolution	
	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes	Values
Fresh products	226 468	2 354 098	257 197	3 226 357	14 %	37 %
Frozen products	179 205	2 373 817	180 182	2 893 667	1 %	22 %
Canned products	118 149	1 034 241	115 351	1 264 408	- 2 %	22 %
Chilled delicatessen	134 891	1 373 907	108 191	1 317 327	- 20 %	- 4 %

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

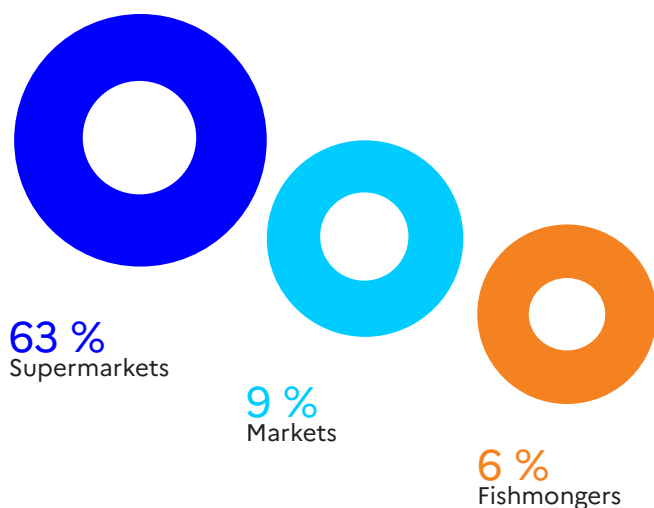
(2) A purchasing households buys the product at least once a year

Source : FranceAgriMer from Kantar Worldpanel

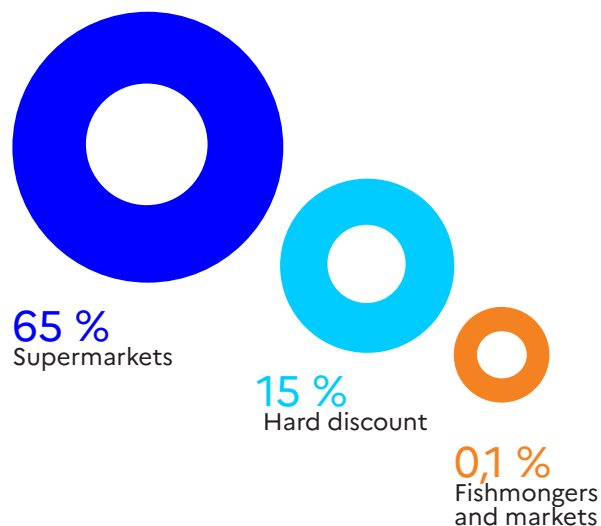
• Households purchases

Purchases of aquatic products by french households for home consumption in 2024 ⁽¹⁾

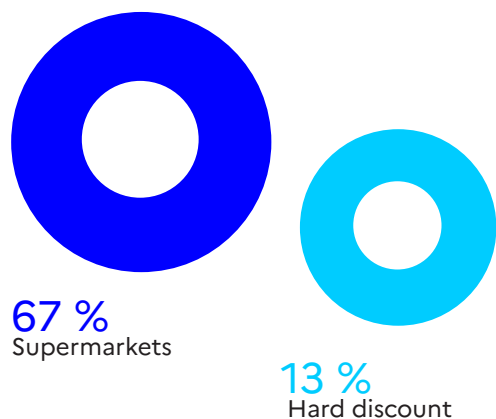
Fresh products



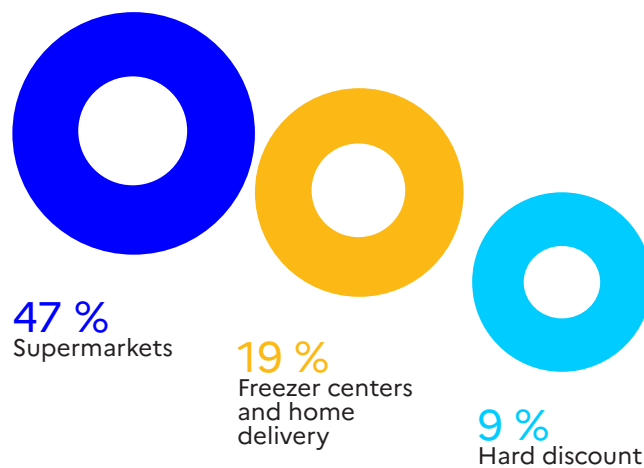
Chilled delicatessen



Canned products



Frozen products



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

Source : FranceAgriMer from Kantar Worldpanel

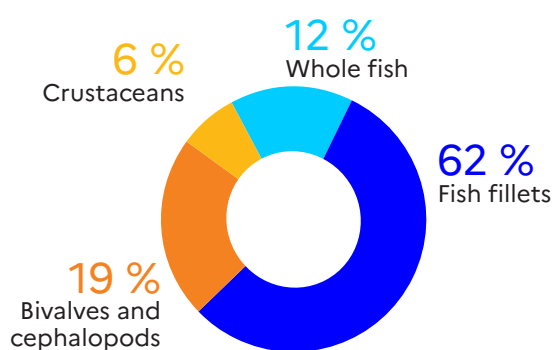
• Households purchases



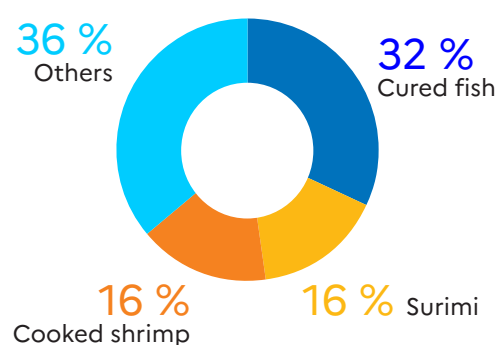
CONSUMPTION

Breakdown of expenditures by presentation and species group in 2024 ⁽¹⁾

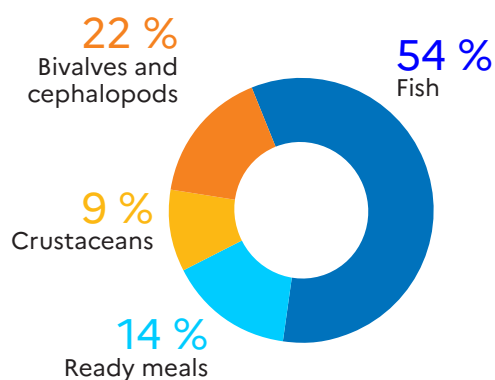
Fresh products



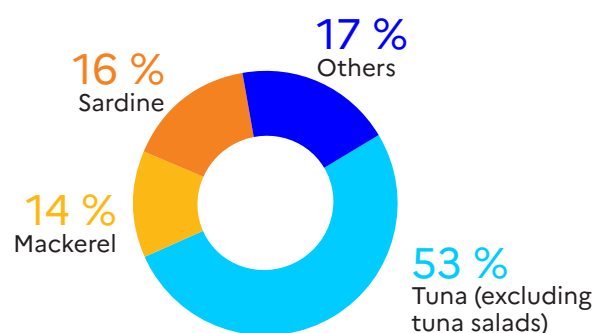
Chilled delicatessen



Frozen products



Canned products



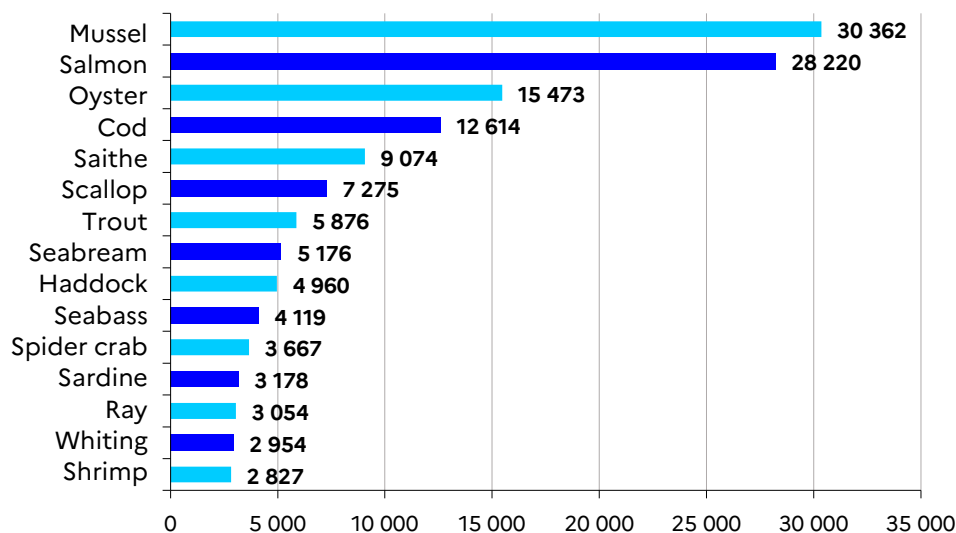
(1) Data collection methodology is detailed on inside back cover

Source : FranceAgriMer from Kantar Worldpanel

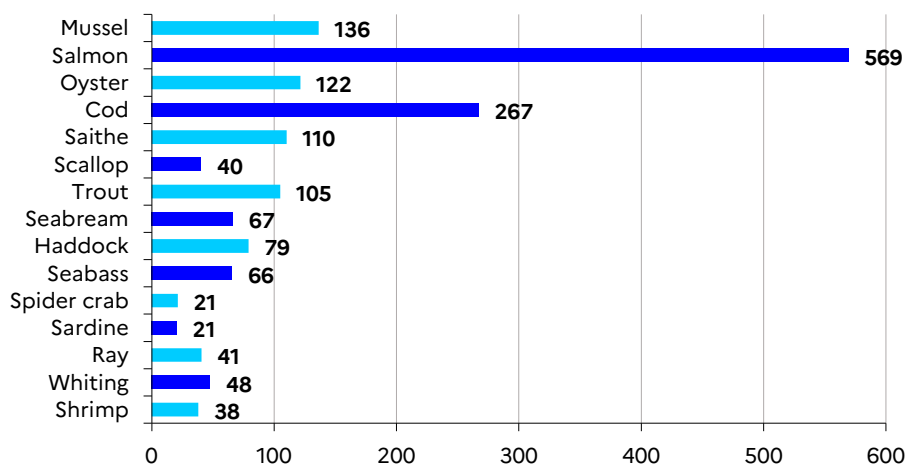
• Households purchases

Main species purchased fresh in 2024 ⁽¹⁾

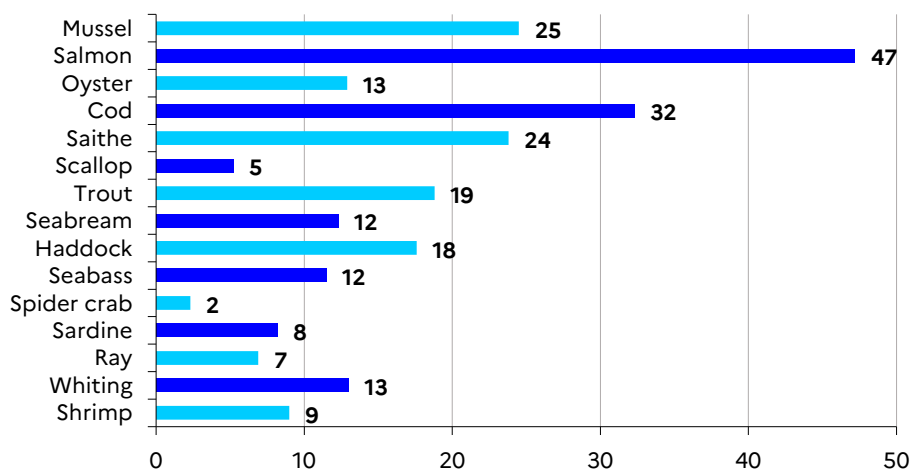
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



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

(2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

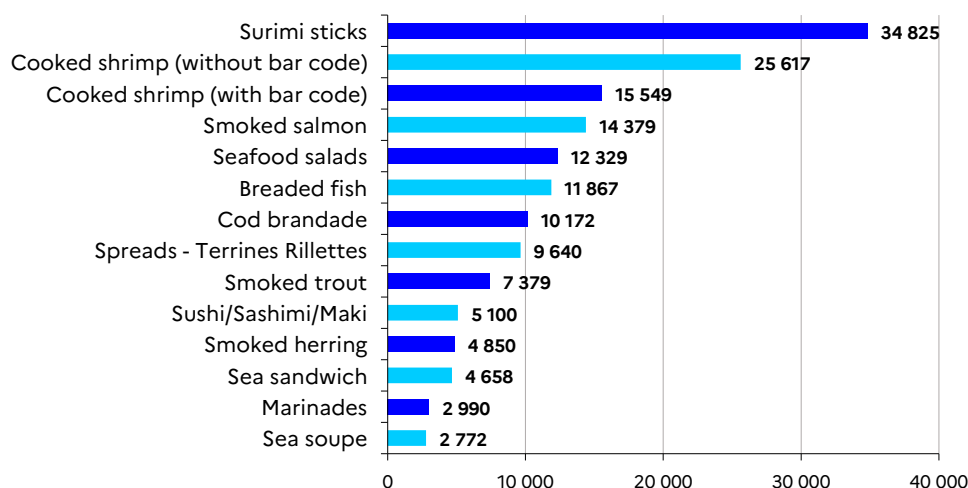
Households purchases



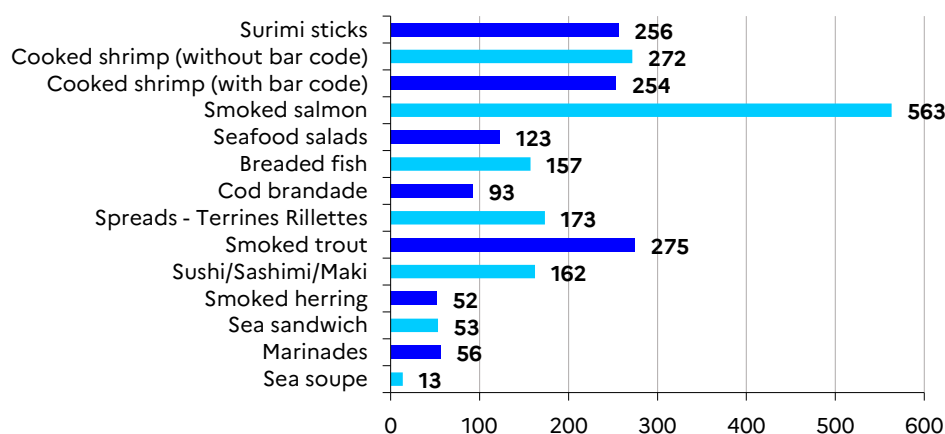
CONSUMPTION

Main products purchased for chilled delicatessen in 2024 ^{(1) (2)}

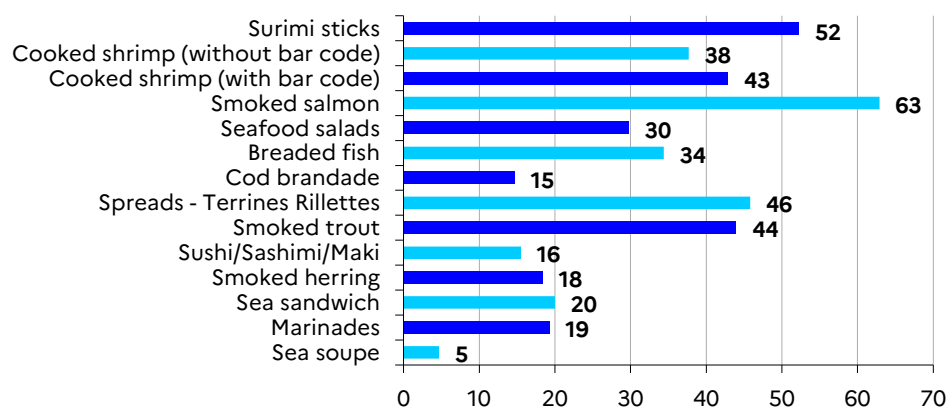
Tons ⁽³⁾



Million euros



Percentage of purchasing households (%)



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

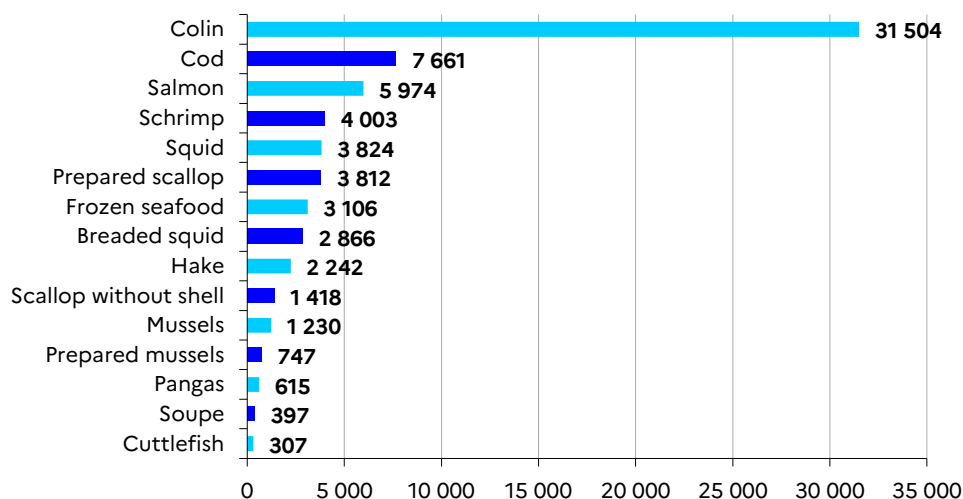
(2) Products with bar code, unless specified

(3) Net weight

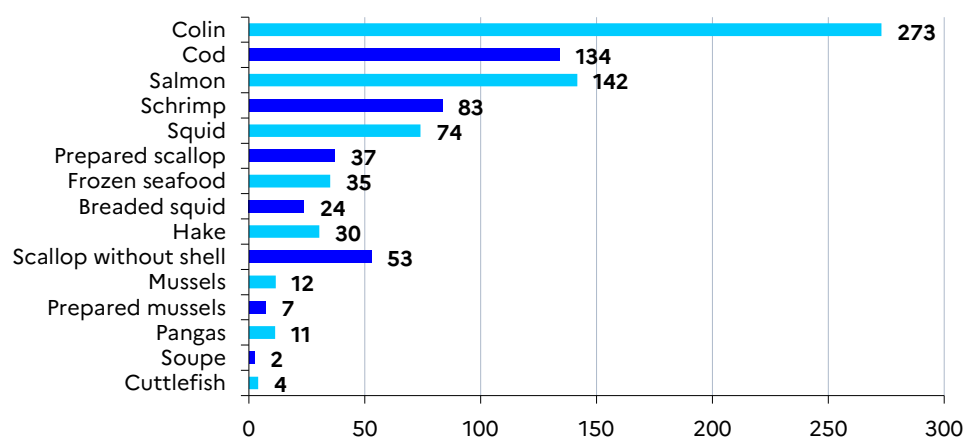
• Households purchases

Main species purchased as frozen products in 2024 ⁽¹⁾

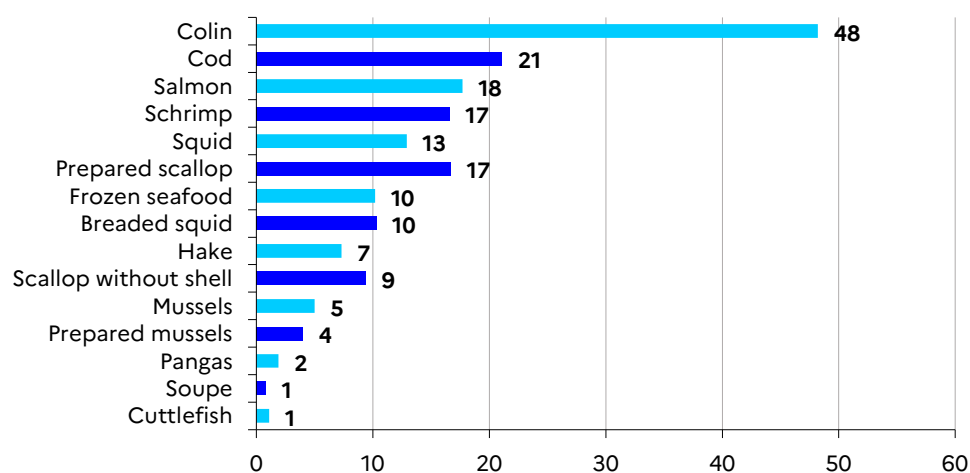
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



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

(2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

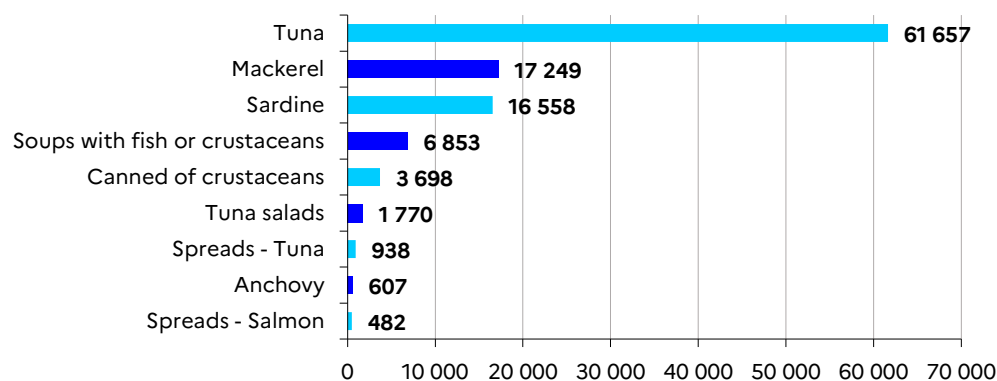
• Households purchases



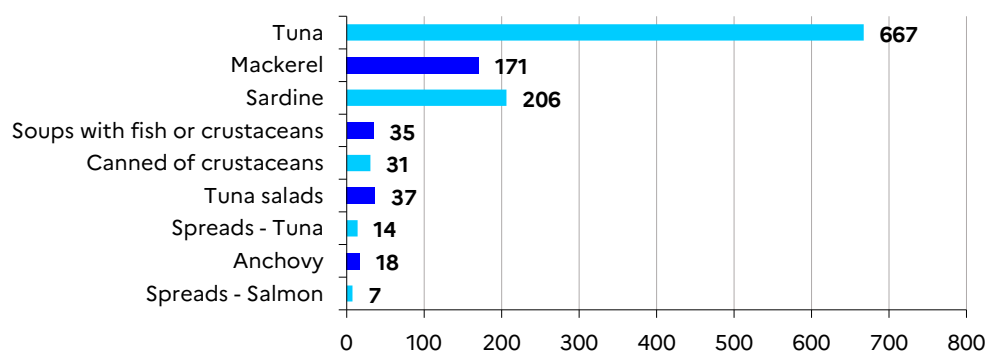
CONSUMPTION

Main species purchased in canned products in 2024 ⁽¹⁾

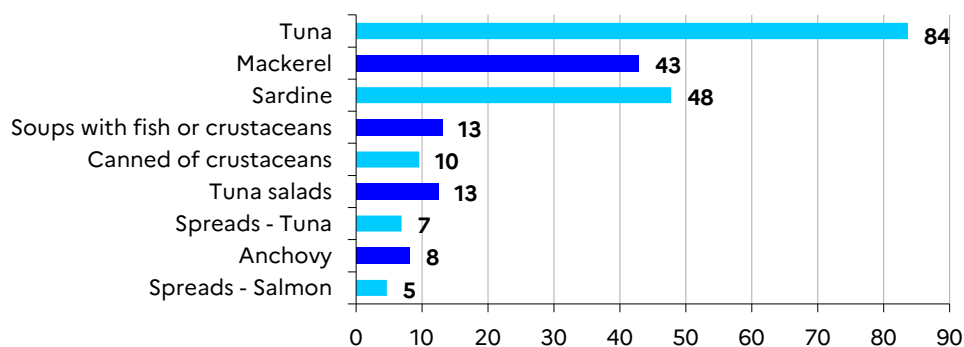
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



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

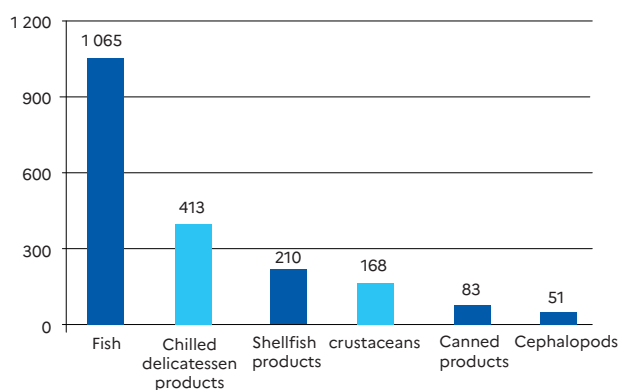
(2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

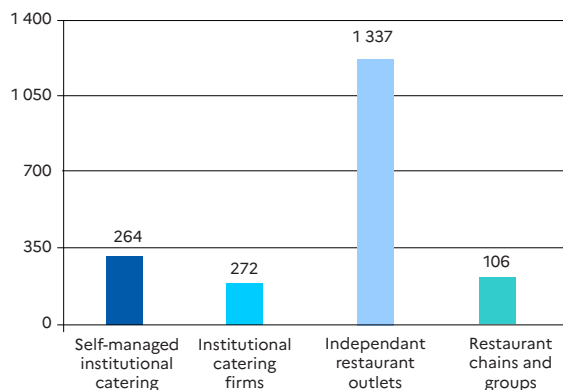
- Catering purchases**

Spendings for the catering sector in 2019

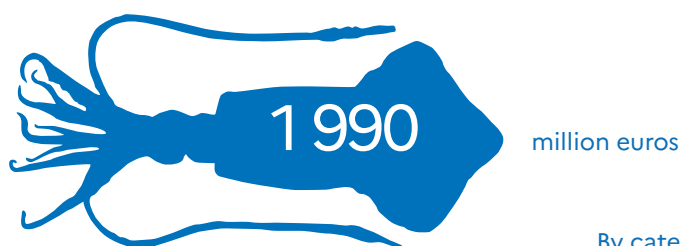
By kind of product (million euros)



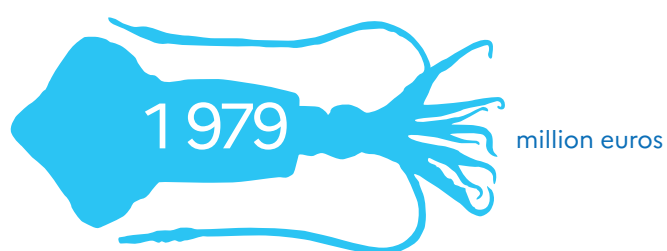
By catering outlet (million euros)



By kind of product



By catering outlet



Source: FranceAgriMer from Circana (now from IRI)

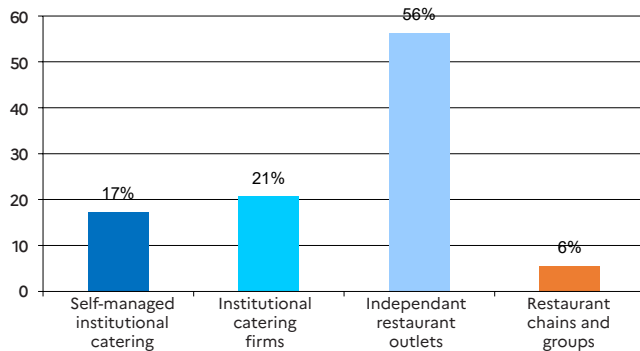
• Catering purchases



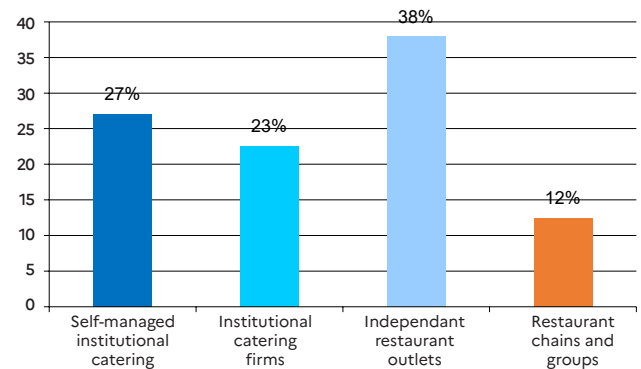
CONSUMPTION

Purchases in volume by kind of products in 2019

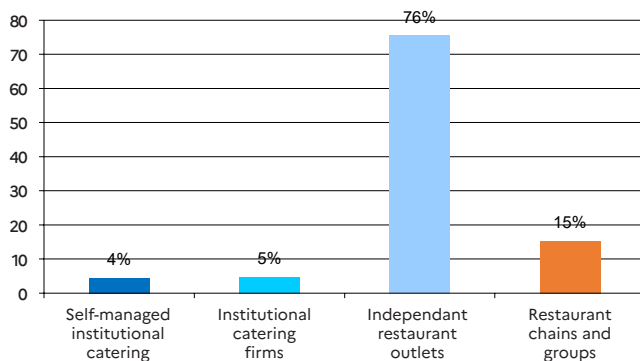
Fish products (%)



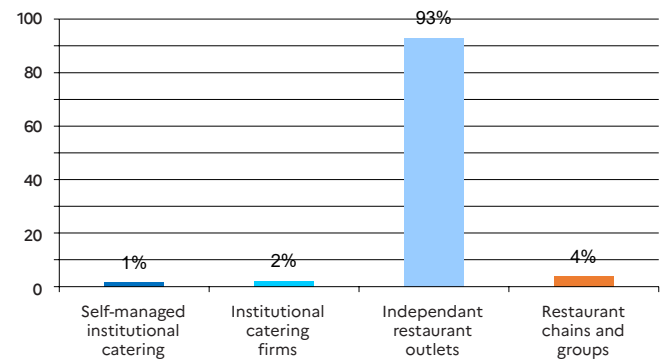
Chilled delicatessen products (%)



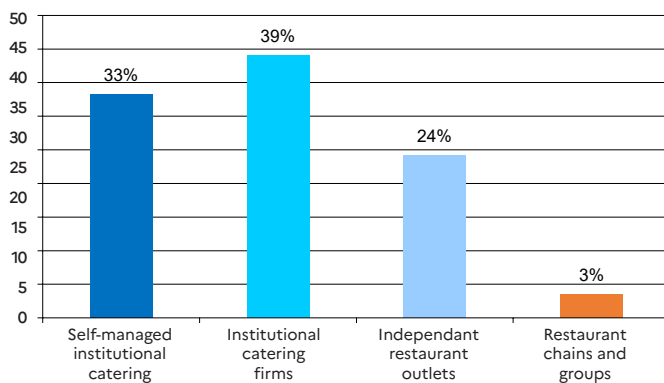
Shellfish products (%)



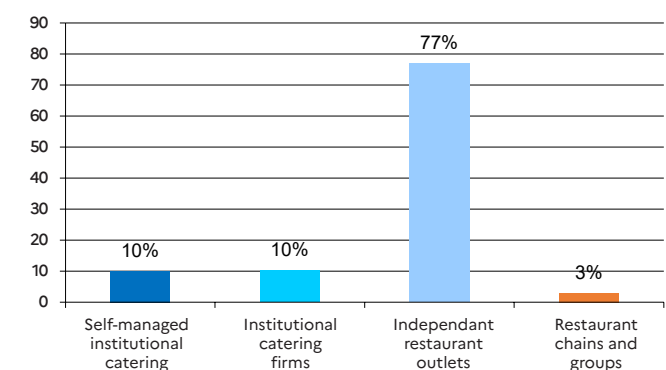
Crustaceans (%)



Canned products (%)



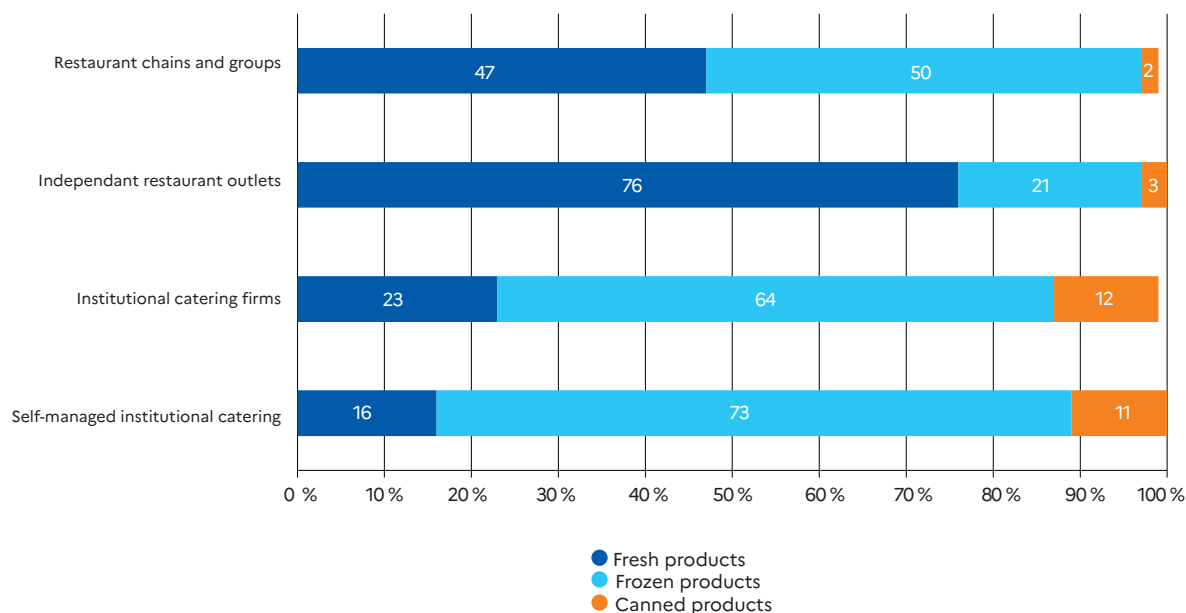
Cephalopods (%)



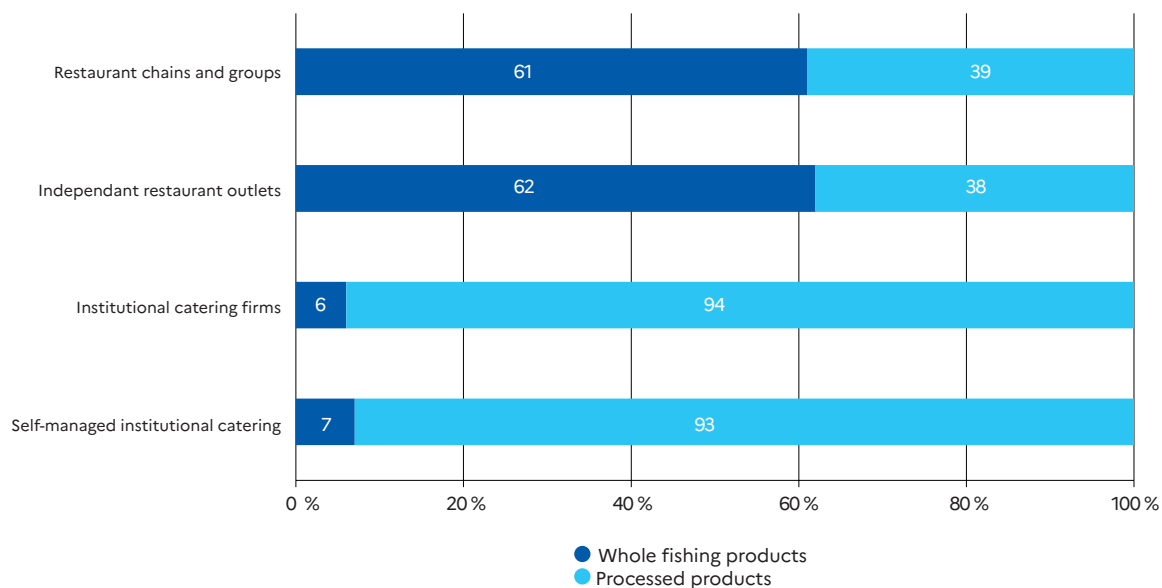
Source: FranceAgriMer from Circana (now from IRI)

• 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 2024 of sales reported in tide halls
- FranceAgriMer Annual report 2024 of foreign trade in fishery products and aquaculture*
- FranceAgriMer Annual report 2024 on the consumption of fishery products and aquaculture*

**coming 2025*

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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12 rue Henri Rol-Tanguy - TSA 20002 / 93555 MONTREUIL Cedex
Tél. : 01 73 30 30 00 ■ www.franceagrimer.fr

 FranceAgriMer
 FranceAgriMer FR