

# The fisheries and aquaculture sector in France

> EDITION april 2012



**Production**  
**Firms**  
**Trade**  
**Consumption**

... Imports and exports / Supply balance

fishing fleet / aquaculture

distribution channel

# Summary

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## Production

page 3



Total sales of fisheries and aquaculture products  
Sales of fisheries products at auction  
Sales of aquaculture products  
Fishing fleet  
Aquaculture firms  
Jobs

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## Firms

page 15



Fishmonger firms  
Trading firms  
Processing firms

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## Trade

page 19



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

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## Consumption

page 25



Supply balance  
Households purchases  
Catering purchases  
Breakdown of purchases by distribution channel

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# Production



fishing fleet /

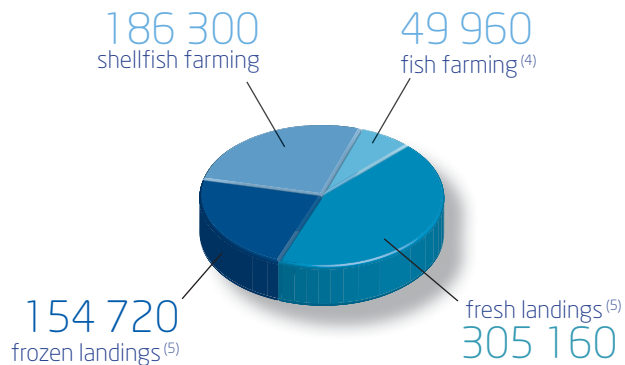
aquaculture firms / jobs

total sales of fisheries and aquaculture products



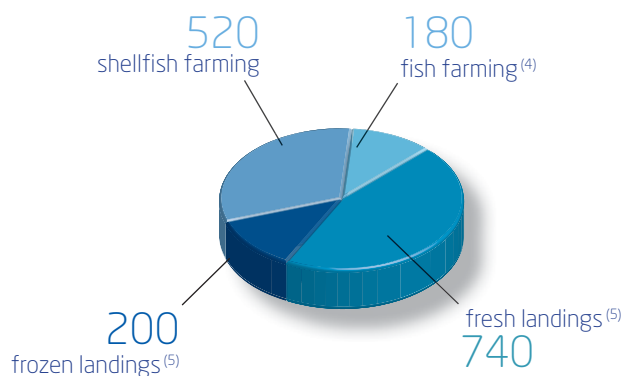
## Quantities sold in 2009/10 <sup>(1)(2)</sup>

by method of production (tons)

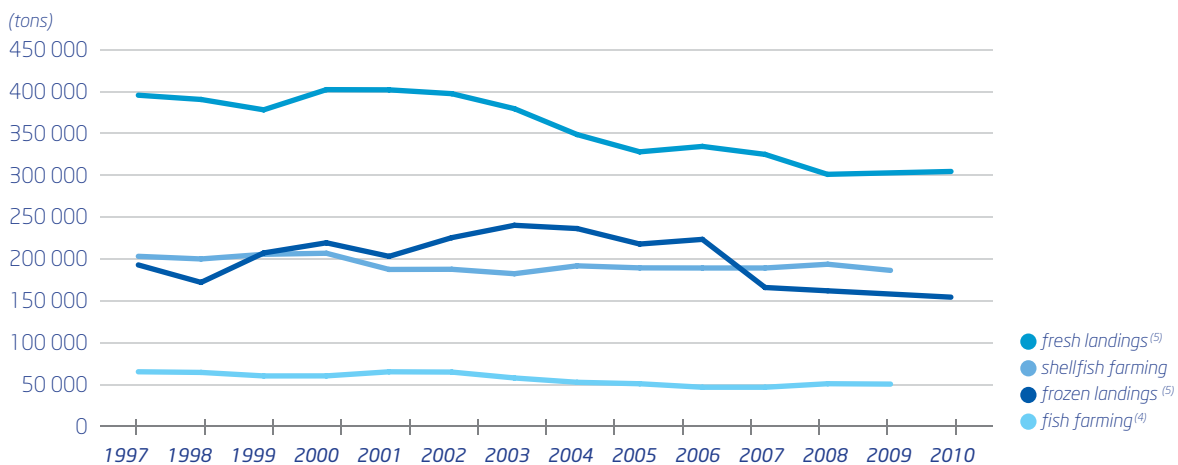


## Value of sales

by method of production (million euros) <sup>(2)</sup>



## Changes in quantities sold in metropolitan France <sup>(1)(2)(5)</sup>



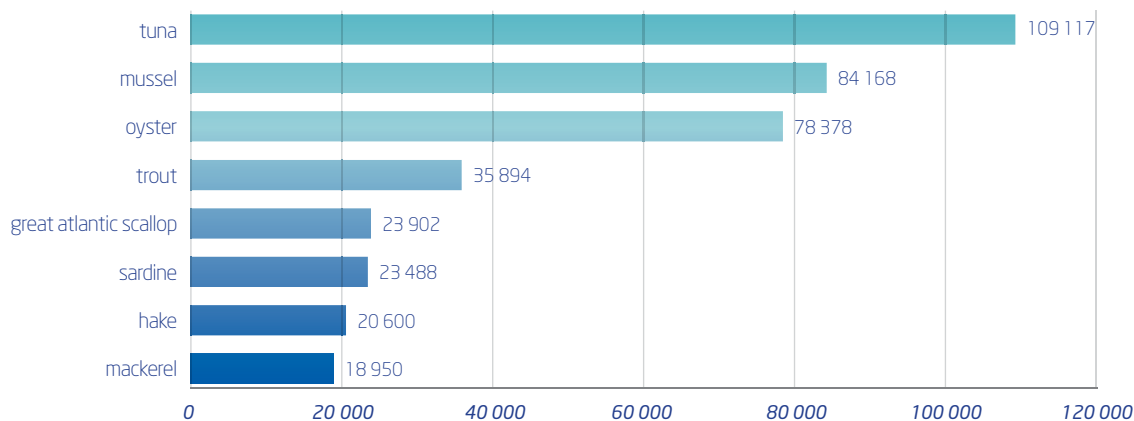
(1) equivalent live weight - (2) excluding seaweeds - (3) data 2010 for fishing and 2009 for fish farming - (4) including farmed crustaceans  
 (5) total sales by French vessels : sales at auction, direct sales, sales to processing industry and export sales - Source : DPMA

# Total sales / metropolitan France and overseas territories

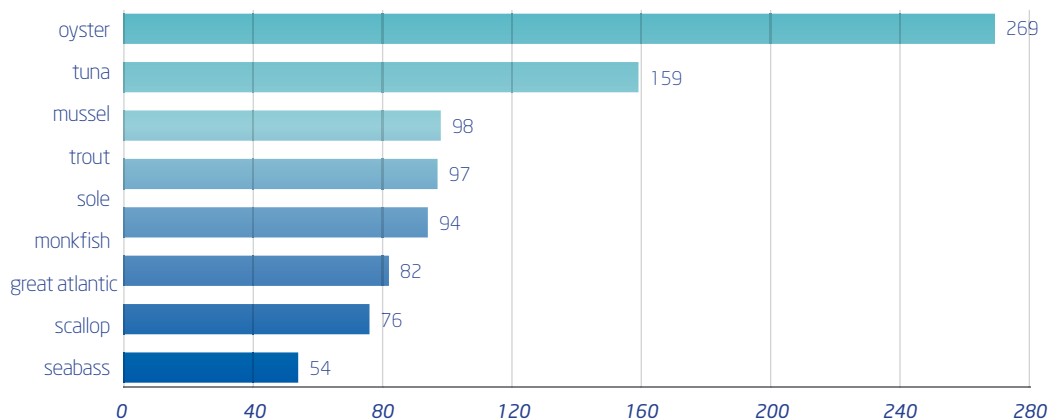
## Main species sold <sup>(1)(2)(3)</sup>

(metropolitan France)

tons <sup>(1)</sup>



millions d'euros



<sup>(1)</sup> equivalent live weight

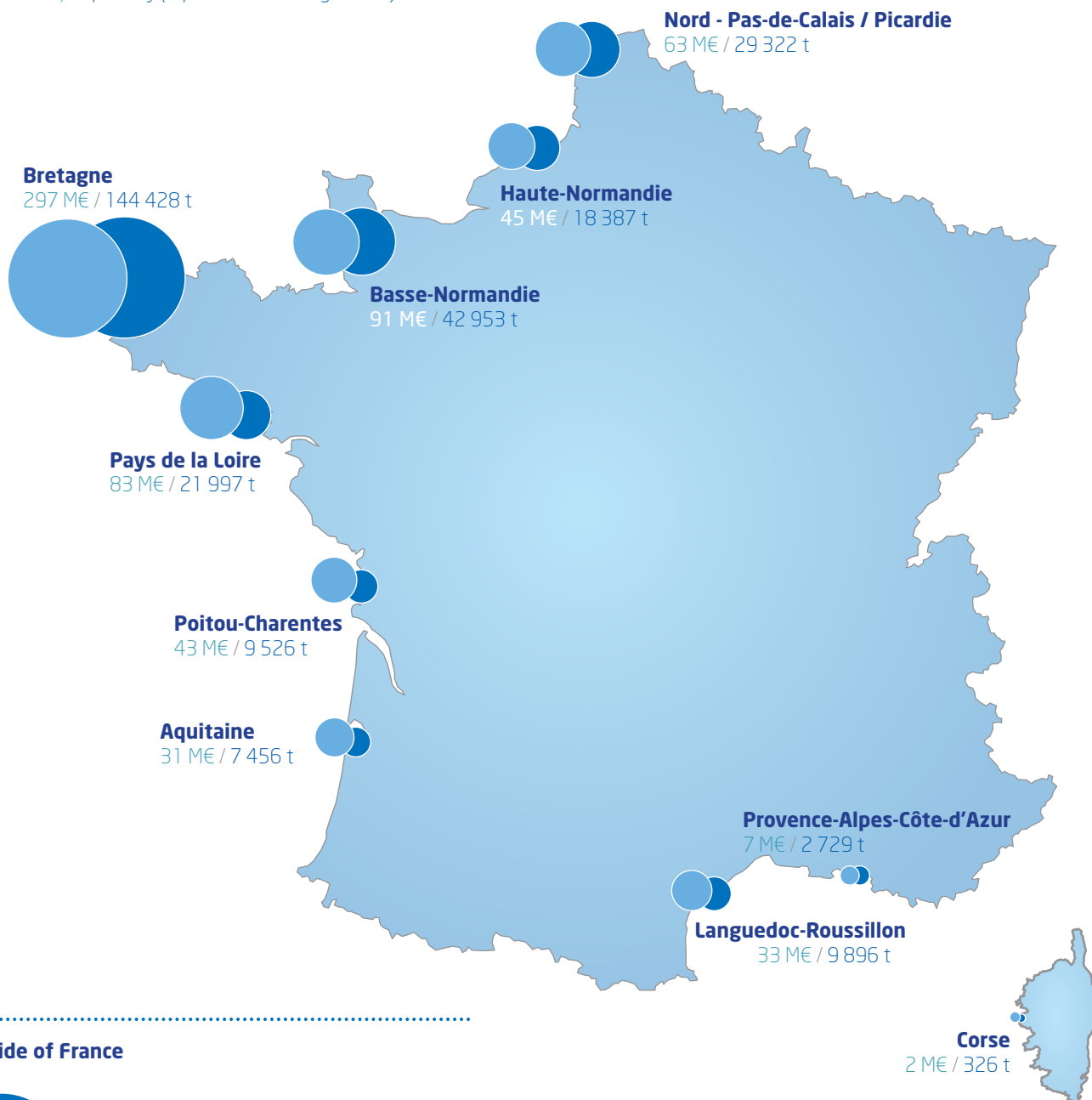
<sup>(2)</sup> total sales by French vessels : sales at auction, direct sales, sales to processing industry and export sales

<sup>(3)</sup> data 2010 for fishing and 2009 for fish farming

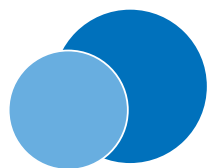
## Fresh and frozen landings in 2010<sup>(1)</sup>

### Sales

value (million euros) / quantity (equivalent live weight tons)



### Sales outside of France



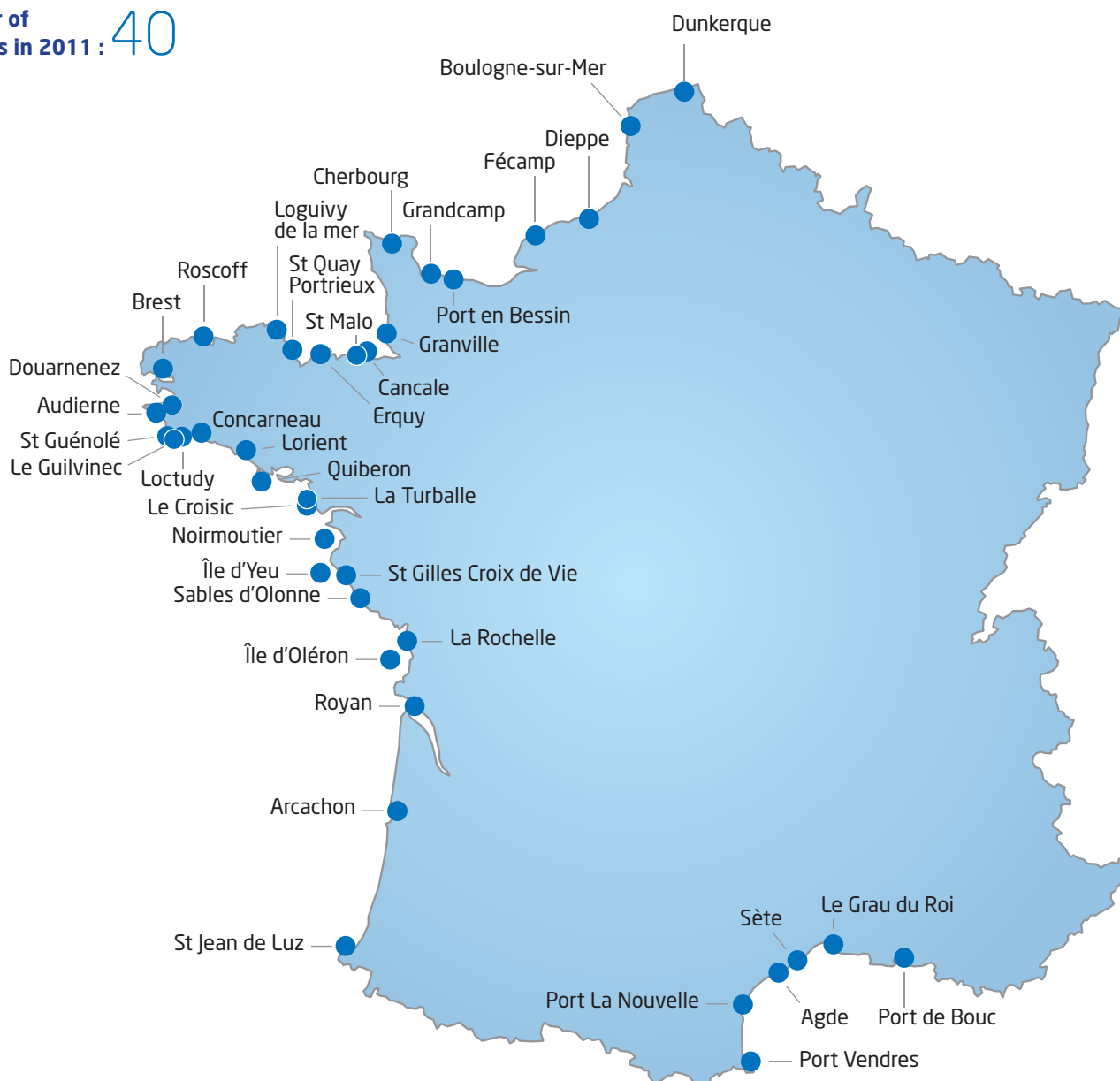
247 M€ / 172 800 t

(1) excluding seaweeds - Source: DPMA

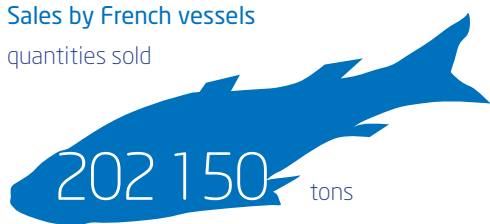
# Sales of fishery products

## Sales of fishery products at auction in 2011

Number of auctions in 2011 : 40

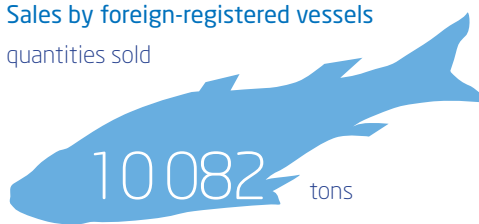


Sales by French vessels  
quantities sold



value of sales 631 million euros

Sales by foreign-registered vessels  
quantities sold

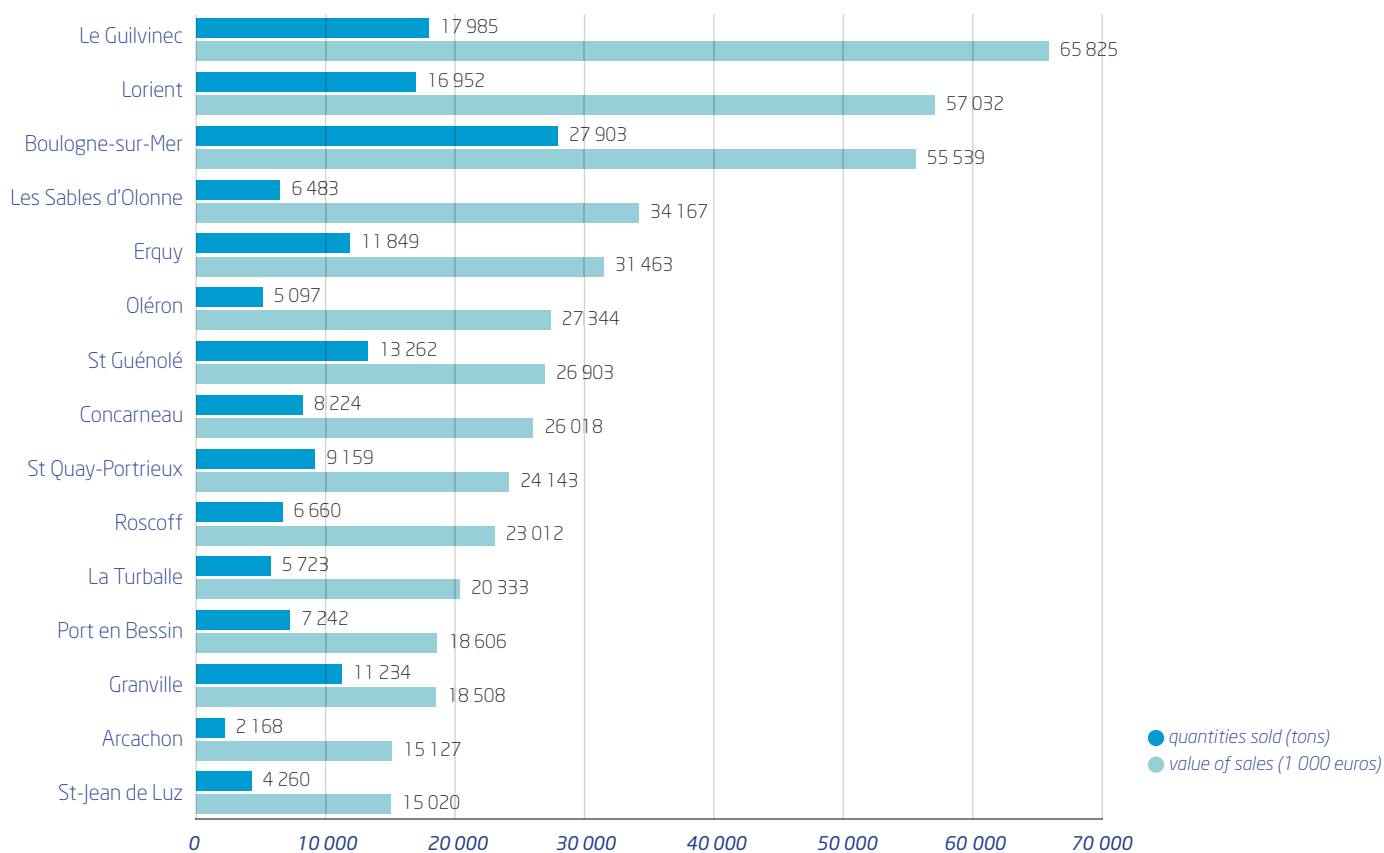


value of sales 27 million euros

Source : FranceAgriMer



## Quantities sold and value of sales by french vessels at the main auctions in 2011

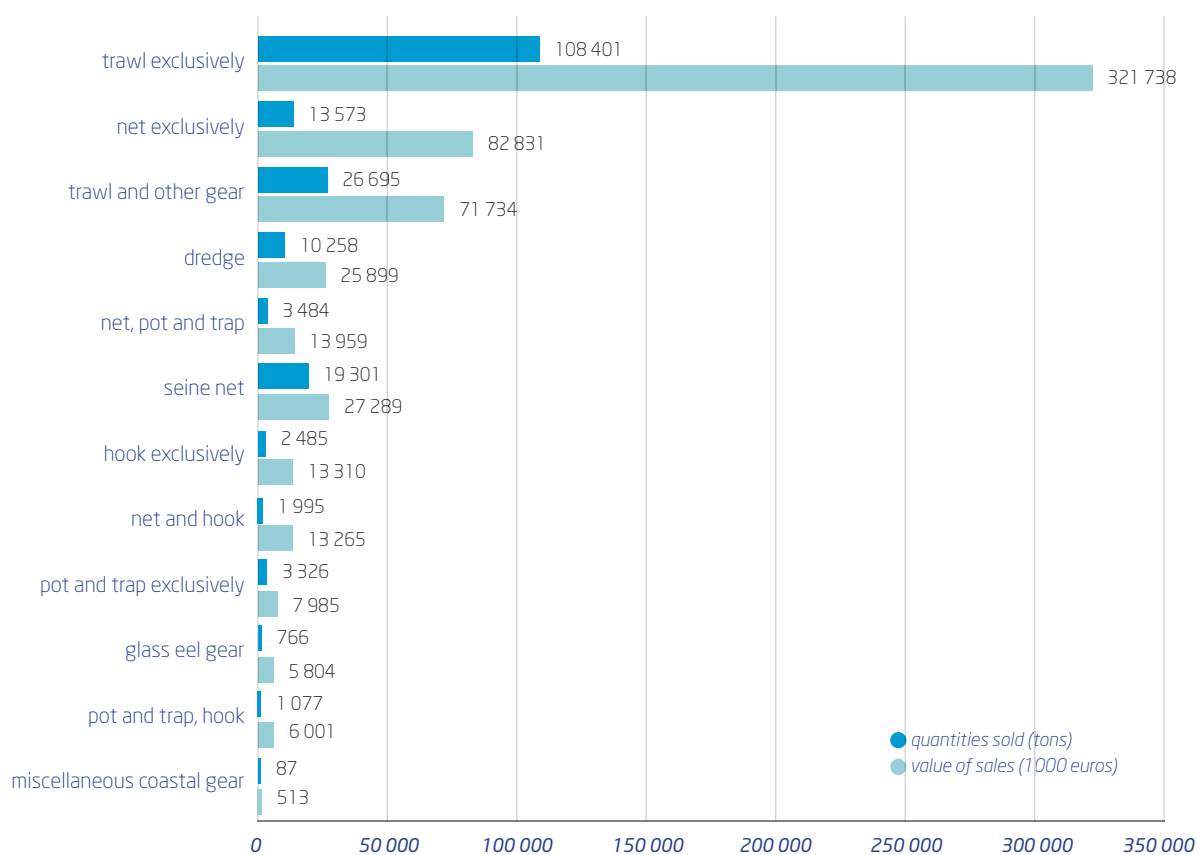


Source : FranceAgriMer



# Sales of fishery products

## Breakdown of quantities sold and value of sales at auction in 2011 by fleet segment<sup>(1)(2)</sup>



## Number of vessels (sales at auction in 2011)

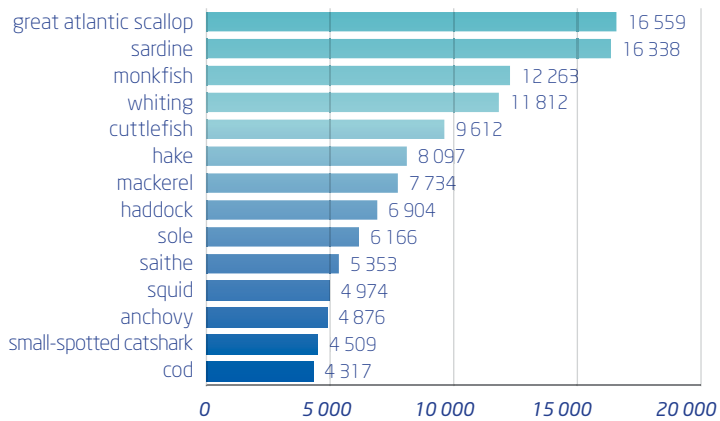
trawl exclusively	491
net exclusively	428
trawl and other gear	505
dredge	294
net, pot and trap	260
seine net	57
hook exclusively	198
net and hook	123
pot and trap exclusively	209
glass eel gear	262
pot and trap, hook	98
miscellaneous coastal gear	101
<b>total</b>	<b>3026</b>

(1) breakdown by fleet segment based on main gear used by vessels according to the 2009 IFREMER SIH survey - (2) excluding Mediterranean sea - Source : FranceAgriMer / IFREMER

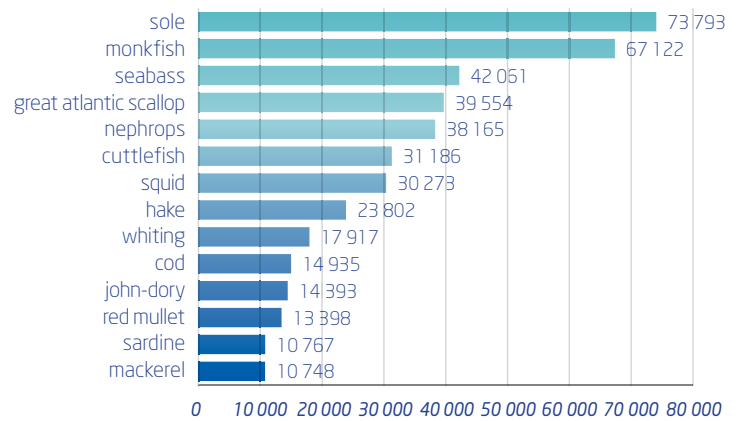
nb : unspecified and inactive are not considered

## Main species sold at auction by French vessels in 2011

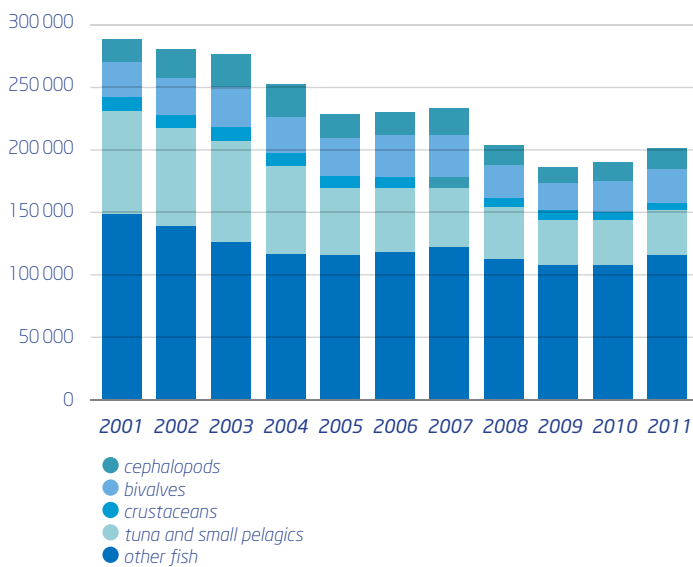
Quantities sold (tons)



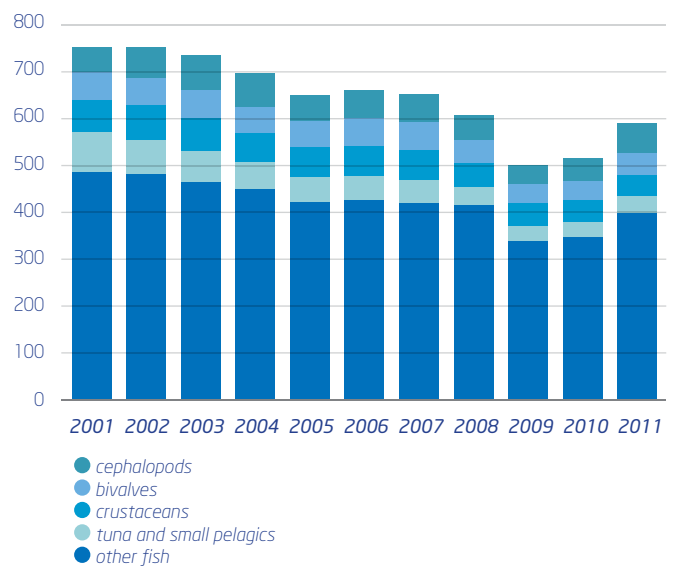
Value of sales (1 000 euros)



Changes in quantities sold by the French vessels by species group (tons)



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

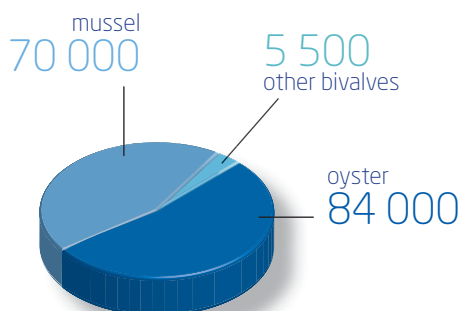


Source : FranceAgriMer

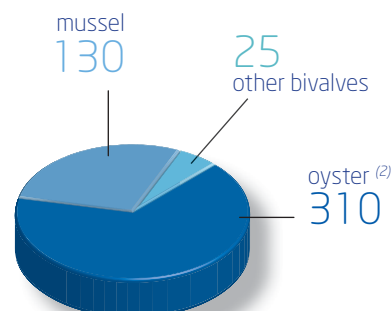
# Sales of aquaculture products in metropolitan France

## Shellfish farming

Quantities sold for consumption (tons)<sup>(1)</sup>



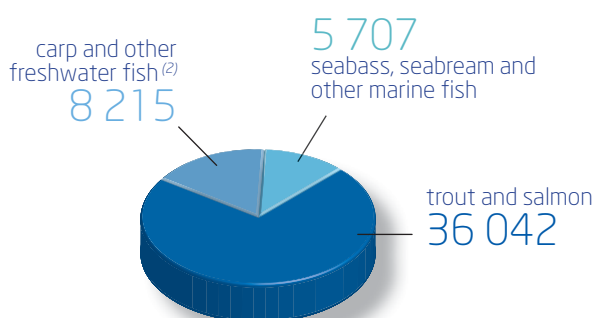
Value of sales (million euros)



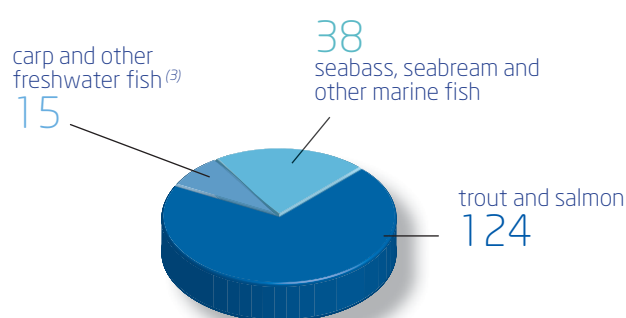
Sources : estimation FranceAgriMer, aquaculture survey 2009 - DPMA / BSPA

## Fish farming

Quantities sold in 2009 (tons)<sup>(1)</sup>



Value of sales in 2009 (million euros)

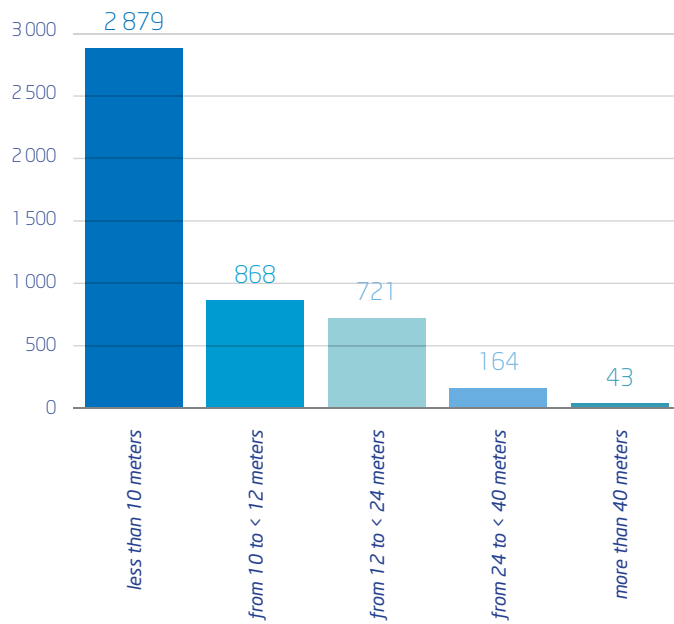


(1) equivalent live weight - (2) excluding grant aids - (3) including farmed crustaceans - Source : aquaculture survey 2009 - DPMA / BSPA

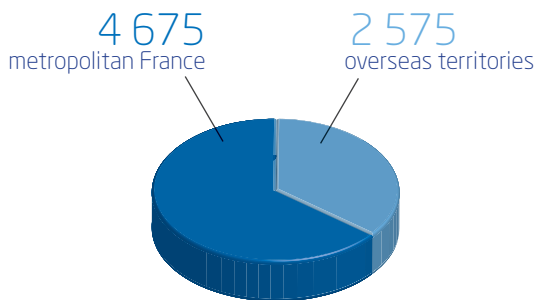
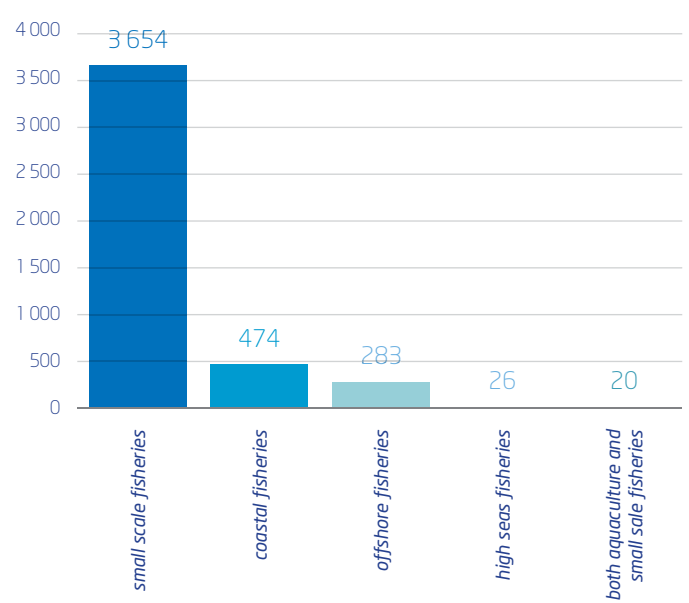


## Fishing fleet in 2011

Breakdown of total vessels by length (metropolitan France)



Breakdown of total vessels by fishery category (metropolitan France)



**Small scale fisheries** out of port  $\leq$  24 hours

**Coastal fisheries** 24 hours < out of port  $\leq$  96 hours

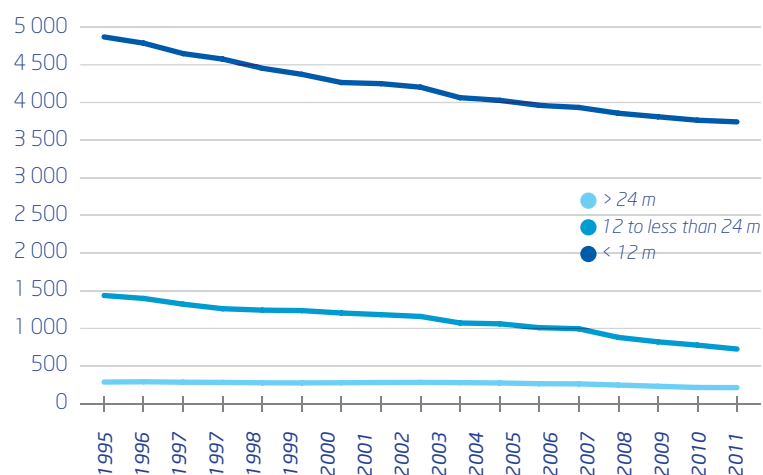
**Offshore fisheries** out of port > 96 hours

**High seas fisheries** vessels over 1 000 GRT (gross register tonnage) or vessels over 150 GRT if out of port > 20 days

Source : SDSIM - Fichier BARPOP

# Fishing fleet / Aquaculture firms

Changes in the number of fishing vessels in metropolitan France



Source : SDSIM, BARPOP file

	< 12 m	12 to less than 24 m	> 24 m
<b>1995</b>	4878	1434	281
<b>1996</b>	4795	1395	285
<b>1997</b>	4656	1318	279
<b>1998</b>	4583	1258	277
<b>1999</b>	4461	1239	271
<b>2000</b>	4380	1233	270
<b>2001</b>	4271	1201	272
<b>2002</b>	4256	1179	275
<b>2003</b>	4209	1155	277
<b>2004</b>	4069	1068	274
<b>2005</b>	4034	1057	269
<b>2006</b>	3967	1006	259
<b>2007</b>	3939	991	257
<b>2008</b>	3862	876	241
<b>2009</b>	3815	817	225
<b>2010</b>	3769	773	209
<b>2011</b>	3747	721	207

## Aquaculture firms

<b>shellfish farming - including seaweed and shrimps</b>	2 952
<b>marine fish farming and sturgeon</b>	45
<b>continental salmonids farming</b>	421

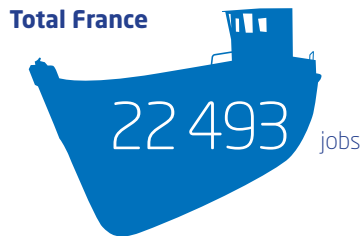
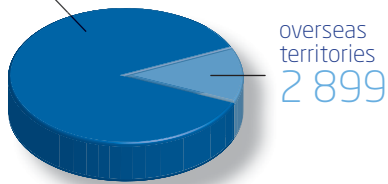
Source : aquaculture survey 2009 - DPMA / BSPA



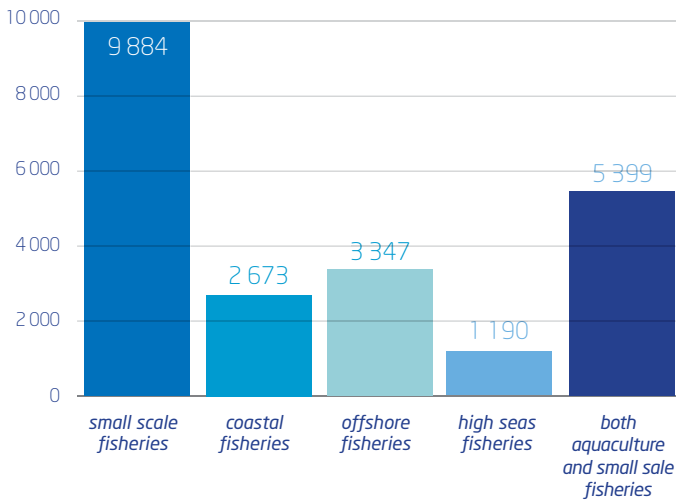
## Jobs

Number of seamen employed on board French fishing vessels in 2010 (seamen of all nationalities)

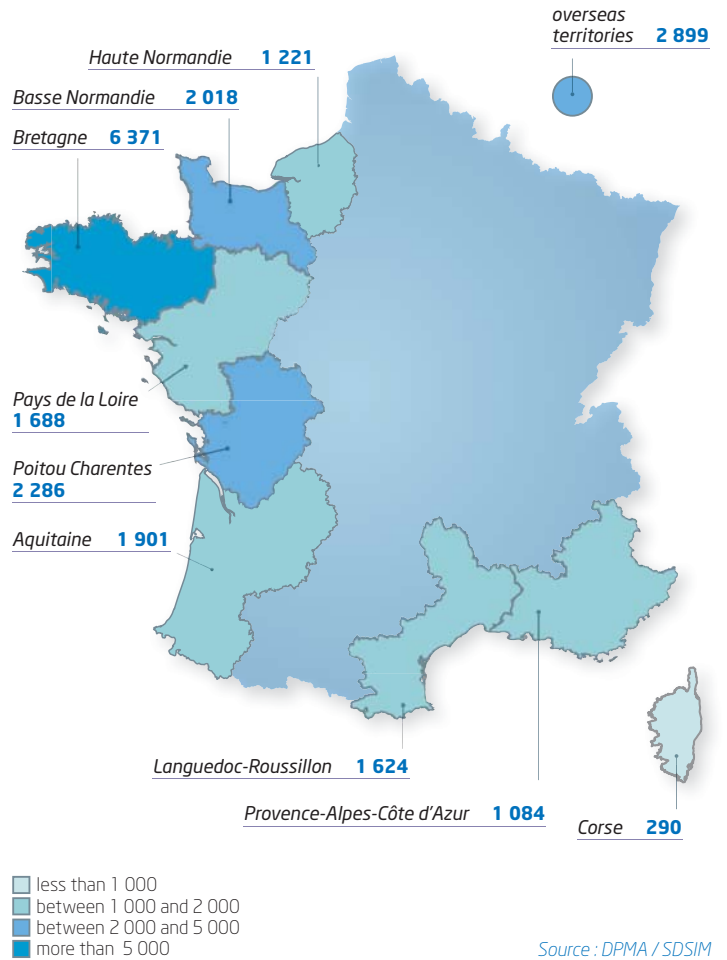
19 594  
metropolitan France



### Metropolitan France



### Regional sharing



Source : DPMA / SDSIM

## Number of full time equivalent jobs in 2009

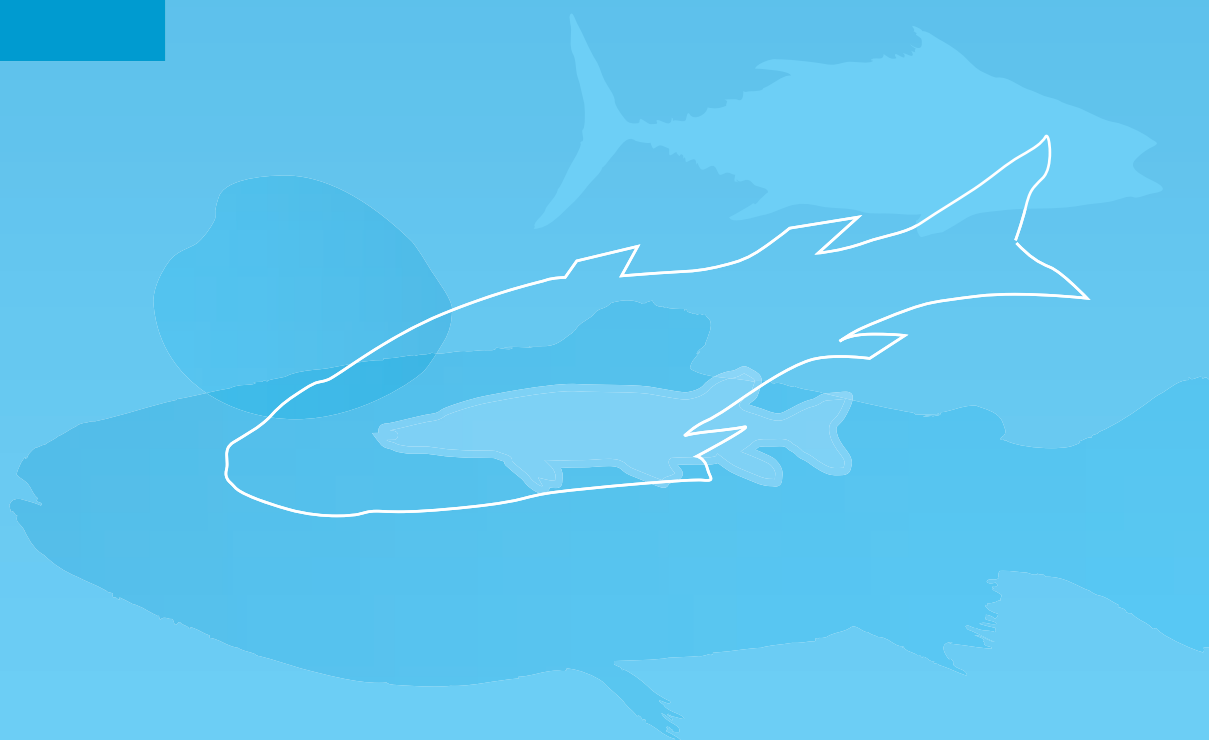
	jobs	FTEJ
<b>fishing</b>	10 919	9 566
<b>shellfish farming<sup>(1)</sup></b>	17 841	9 566
<b>marine fish farming and sturgeon<sup>(1)</sup></b>	752	636
<b>continental salmonids farming<sup>(1)</sup></b>	2 101	1 540

(1) including seasonal jobs

Sources : Ifremer - aquaculture survey 2009 - DPMA / BSPA

# Firms

fishmonger's / trading / processing  
by sales / by region



## Fishmonger's in 2010

number of establishments



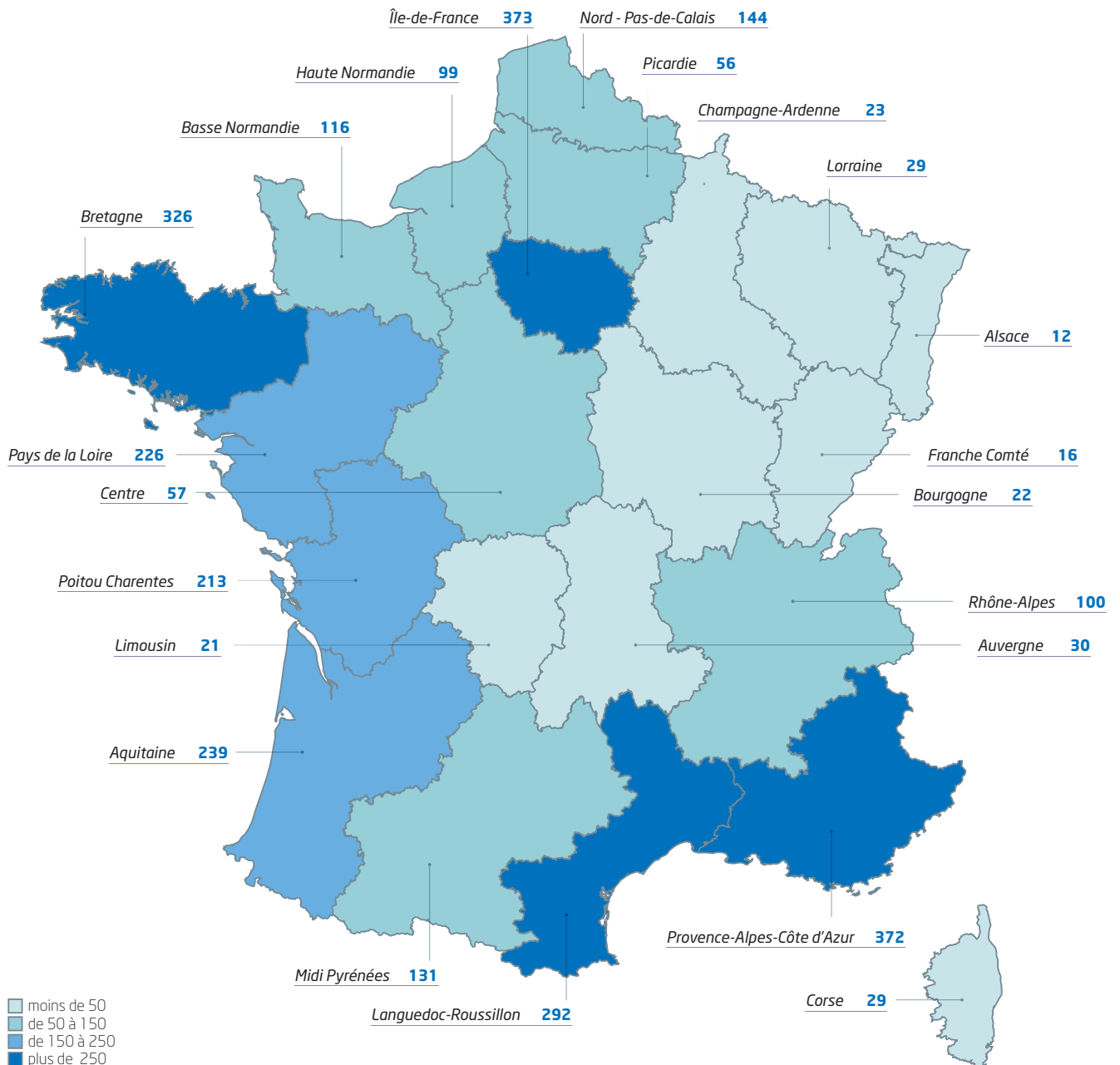
net sales



full time equivalent jobs



Number of establishments per region



Sources : Via.Aqua and Proteis for FranceAgriMer



# Trading firms

## Trading firms in 2010

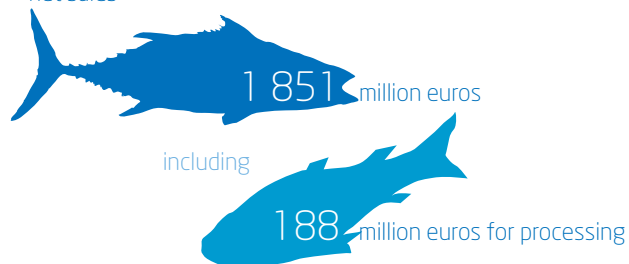
number of firms



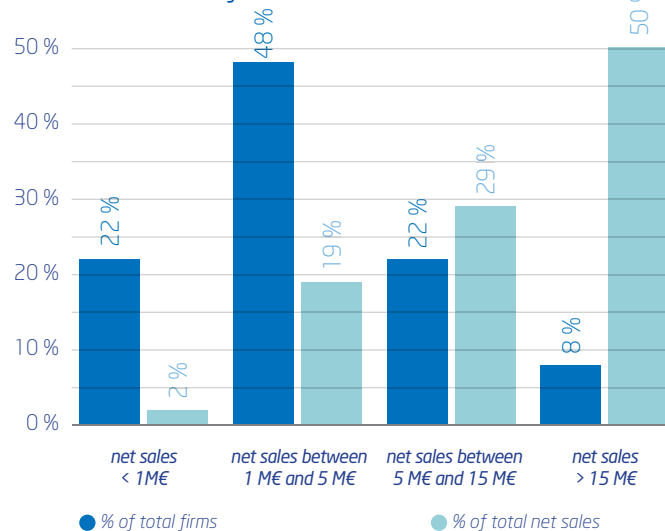
jobs



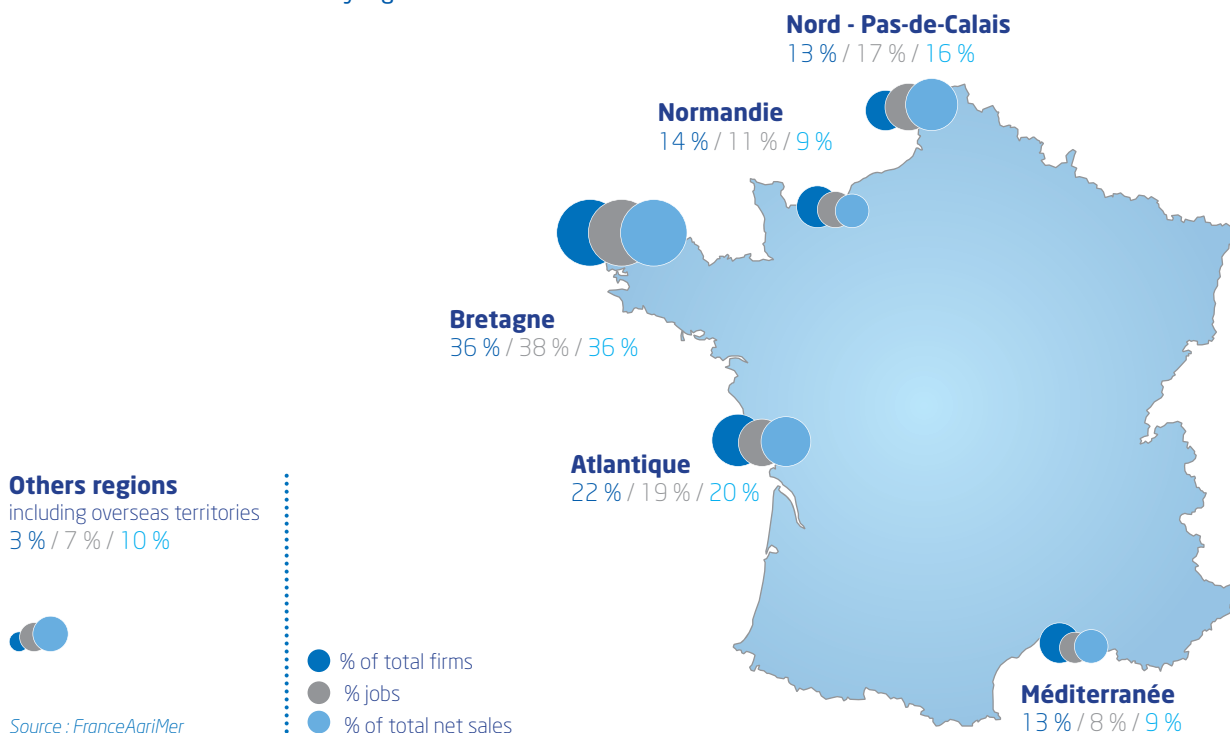
net sales



Breakdown of firms by total net sales

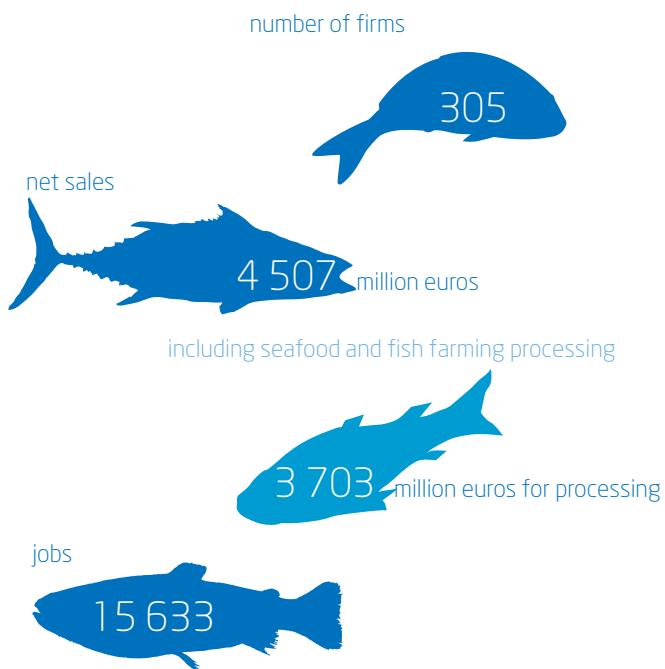


## Breakdown of firms and total net sales by region

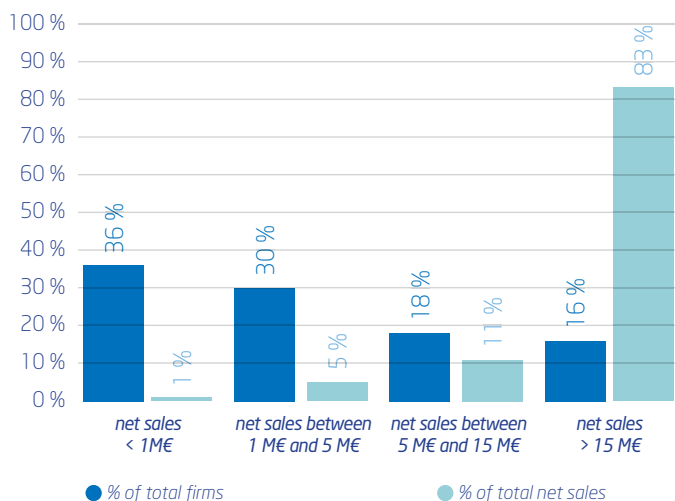


Source : FranceAgriMer

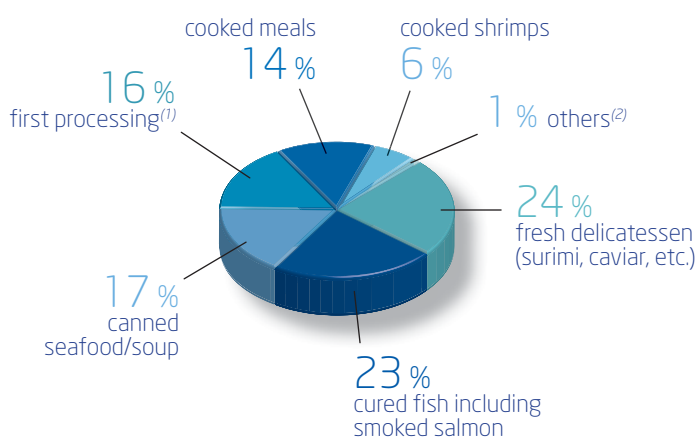
## Processing main activity firms in 2010



### Breakdown of firms by total net sales

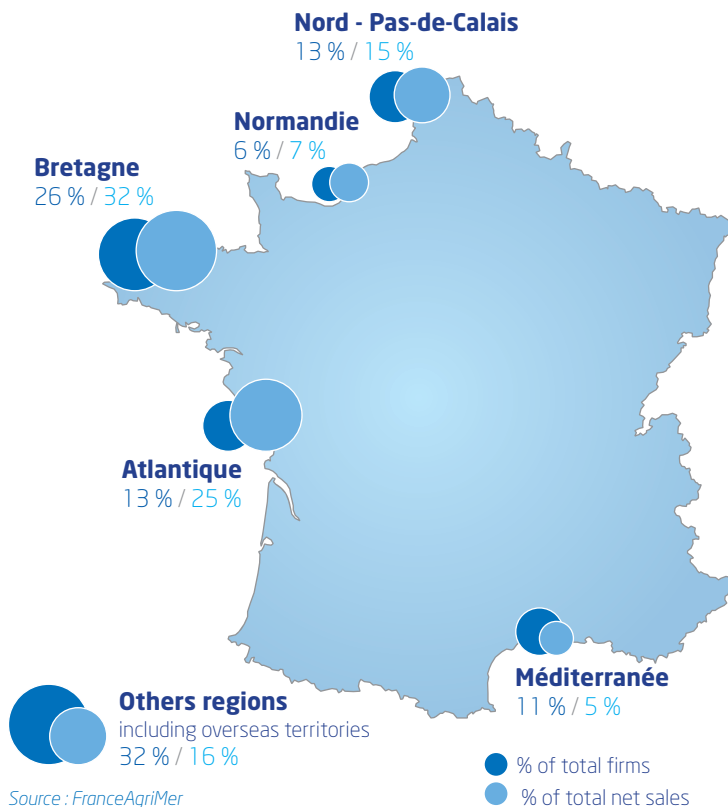


### Seafood processing net sales



(1) filleting, cutting, peeling, packaging, surgelation  
 (2) seaweeds, in fish products, others

### Breakdown of processing firms and sales by region



Source : FranceAgriMer

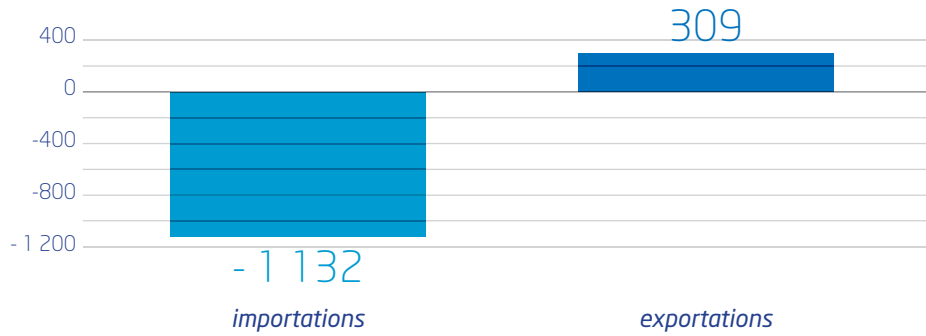
# Trade

imports / exports

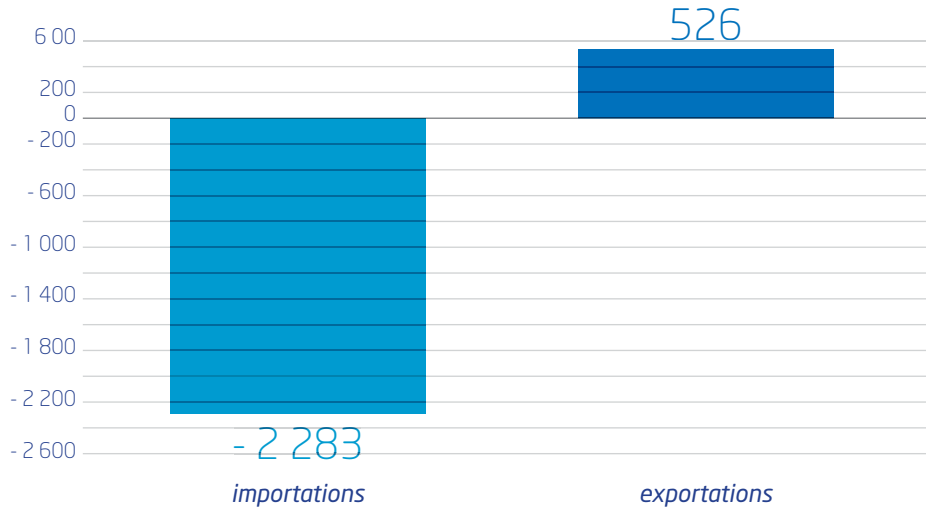
by presentation / by species / by geographical origine /  
main species



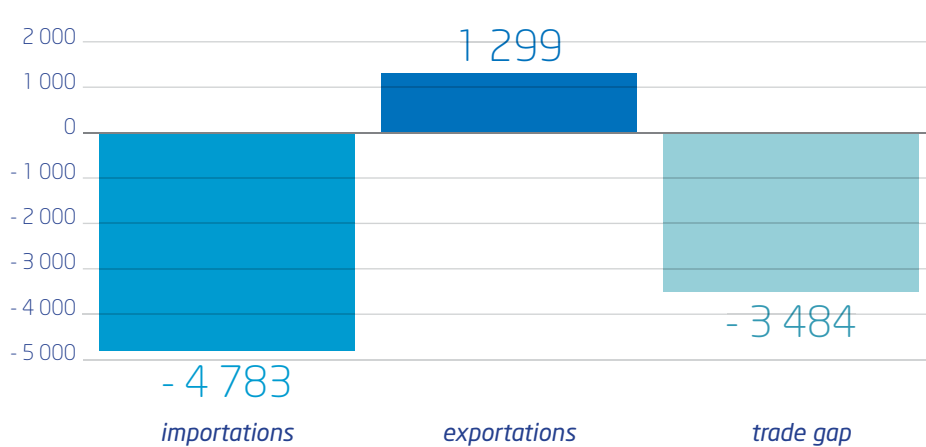
Net weight (1 000 tons)



Live weight (1 000 tons)



Value (million euros)

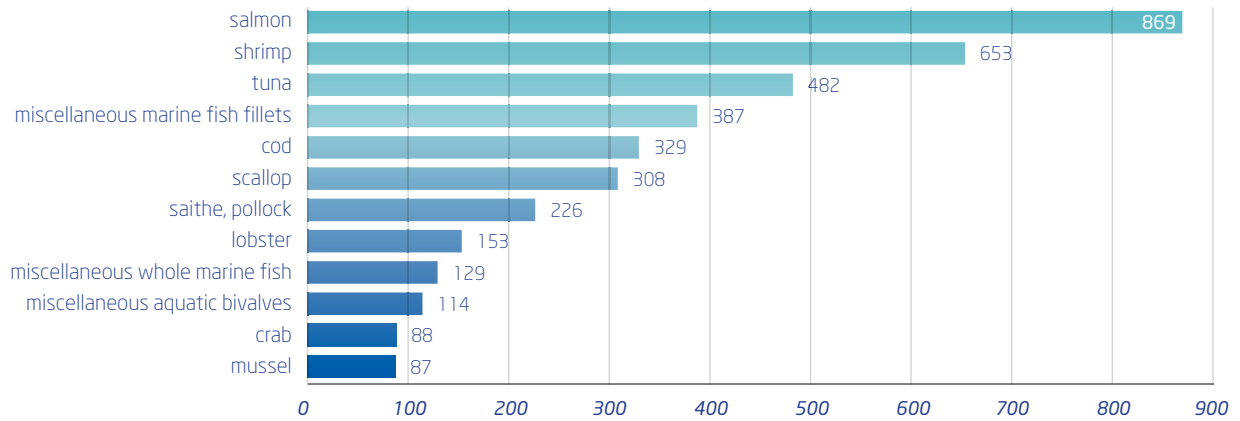


Source: French customs

# Imports and exports / metropolitan France and overseas territories

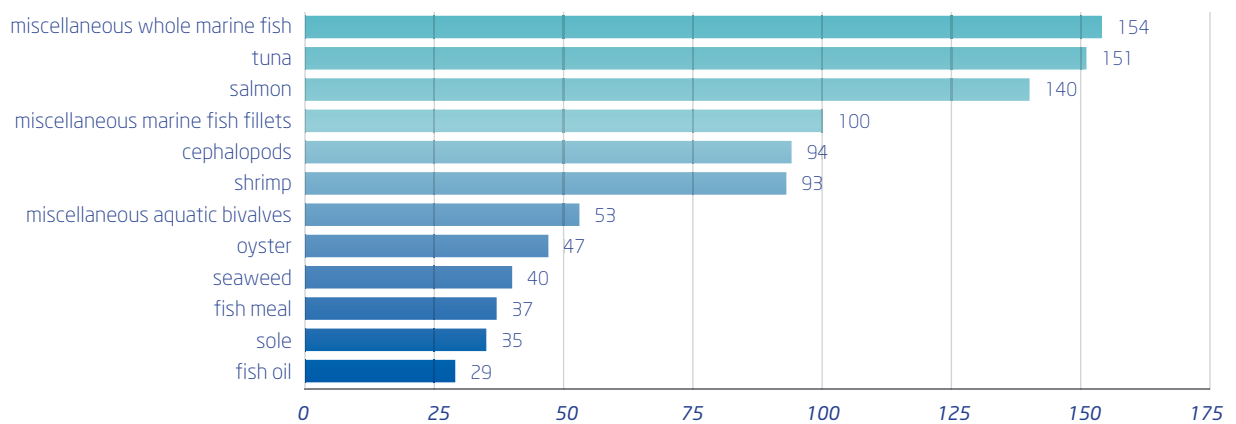
## Imports - main species in 2011

Value (million euros)



## Exports - main species in 2011

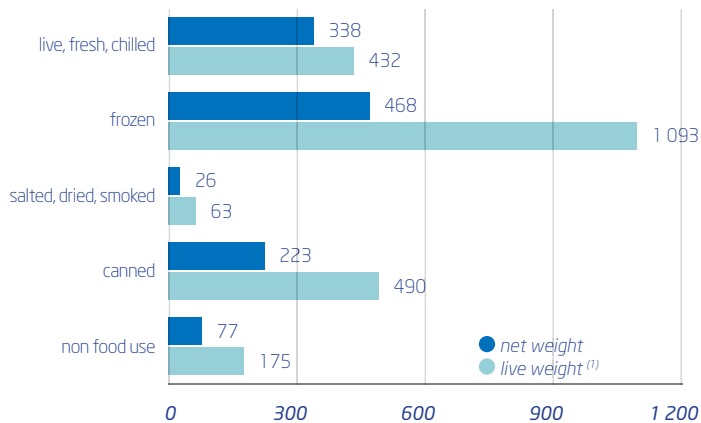
Value (million euros)



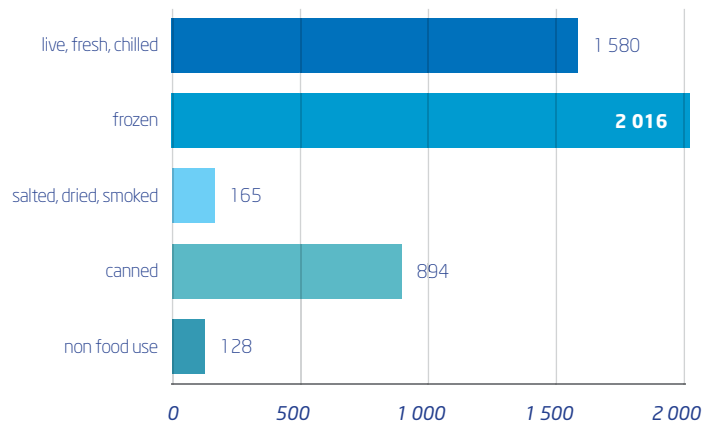
Source : French customs

## Imports by presentation in 2011

Imports by volume (1 000 tons)

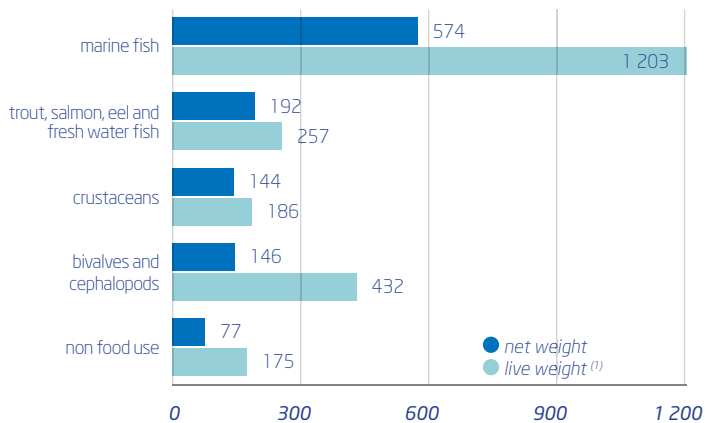


Imports by value (million euros)

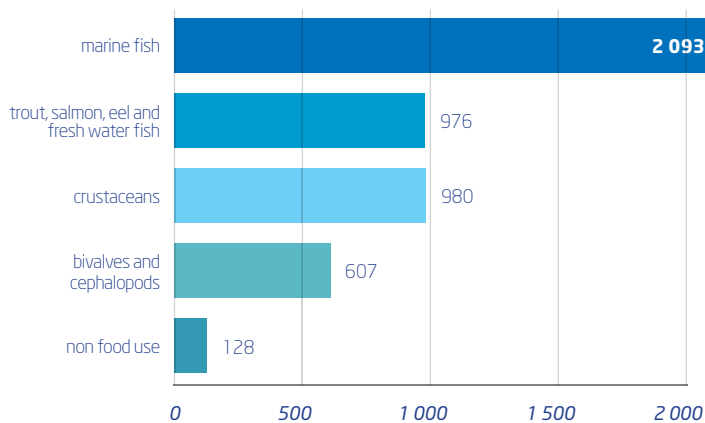


## Imports by species group in 2011

Imports by volume (1 000 tons)



Imports by value (million euros)

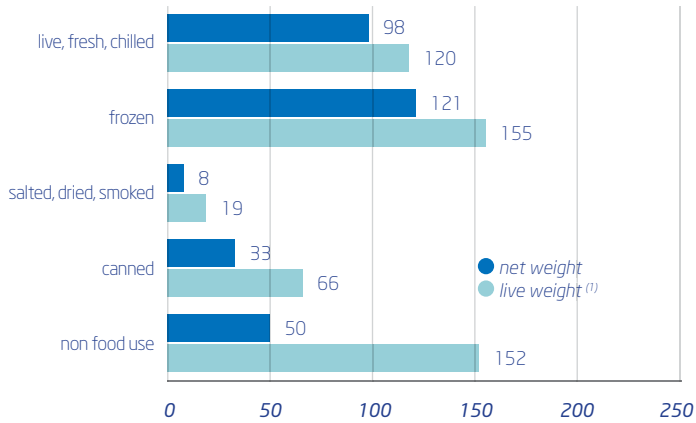


(1) data collection methodology is detailed on inside back cover - Source : French customs

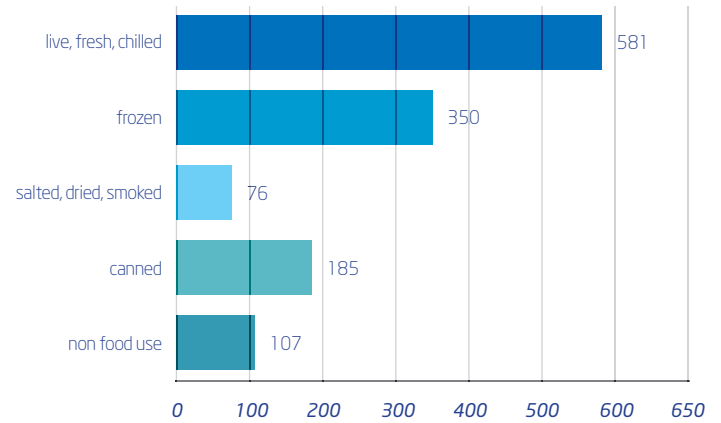
# Imports and exports / metropolitan France and overseas territories

## Exports by presentation in 2011

Exports by volume (1 000 tons)

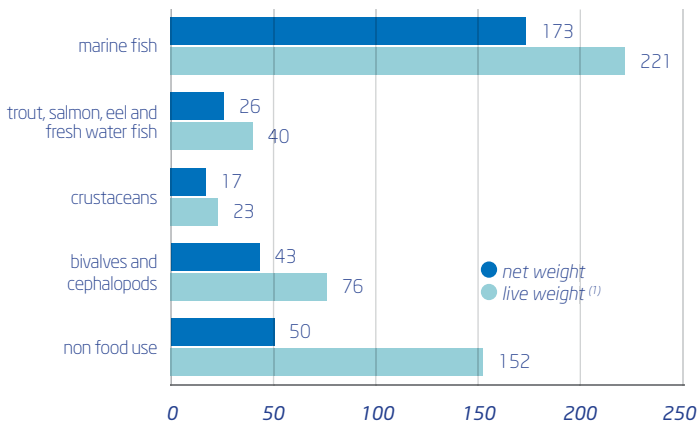


Exports by value (million euros)

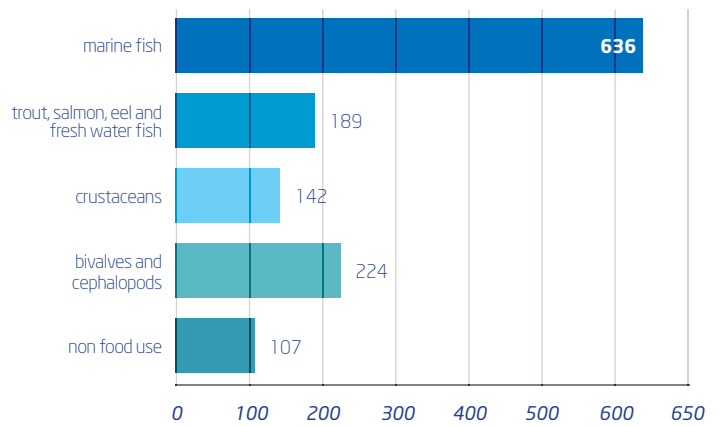


## Exports by species group in 2011

Exports by volume (1 000 tons)



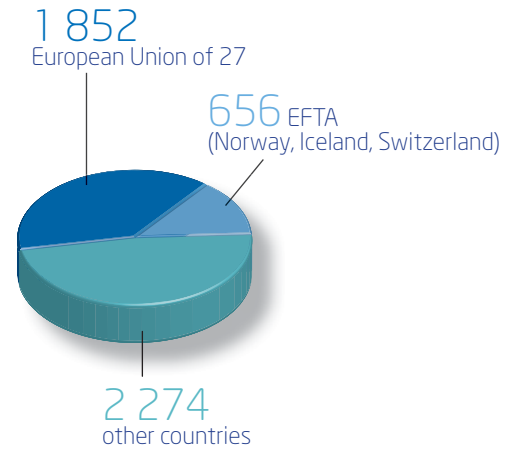
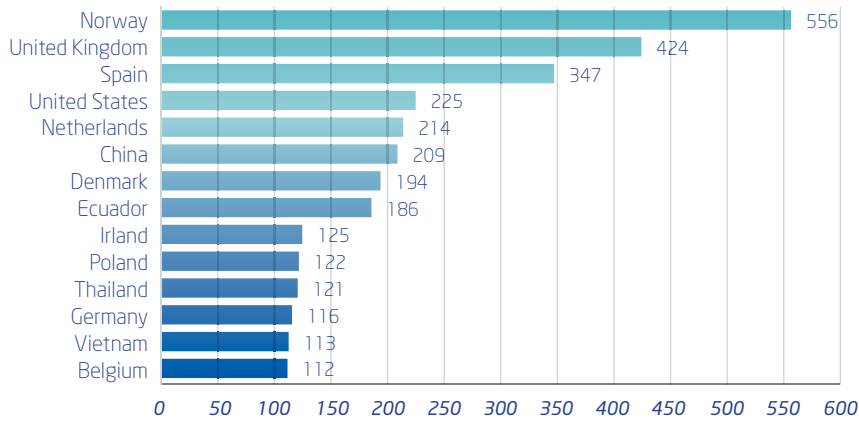
Exports by value (million euros)



(1) data collection methodology is detailed on inside back cover - Source: French customs

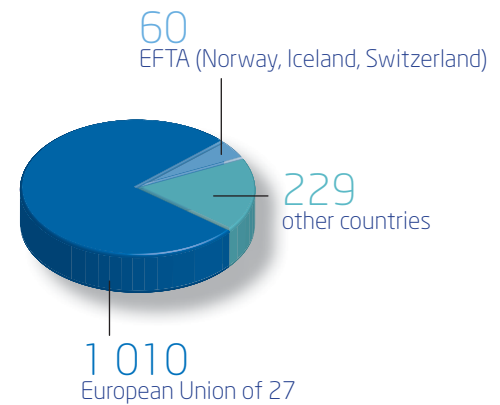
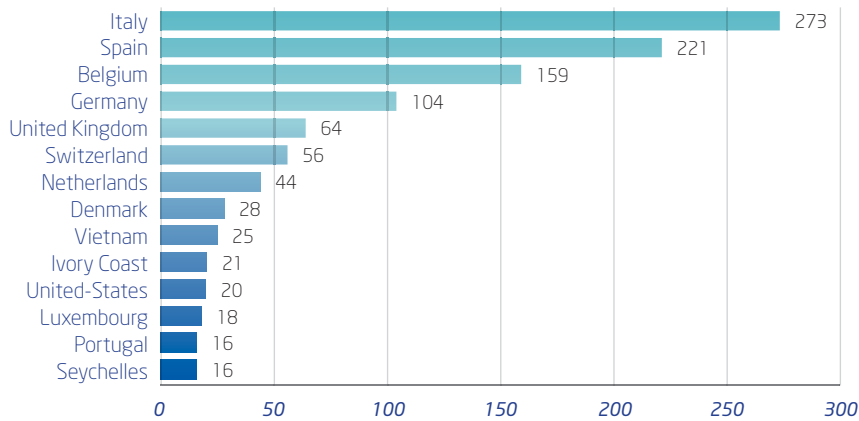
## Imports of aquatic products by geographical origin in 2011

Value (million euros)



## Exports of aquatic products by destination in 2011

Value (million euros)



Source: French Customs

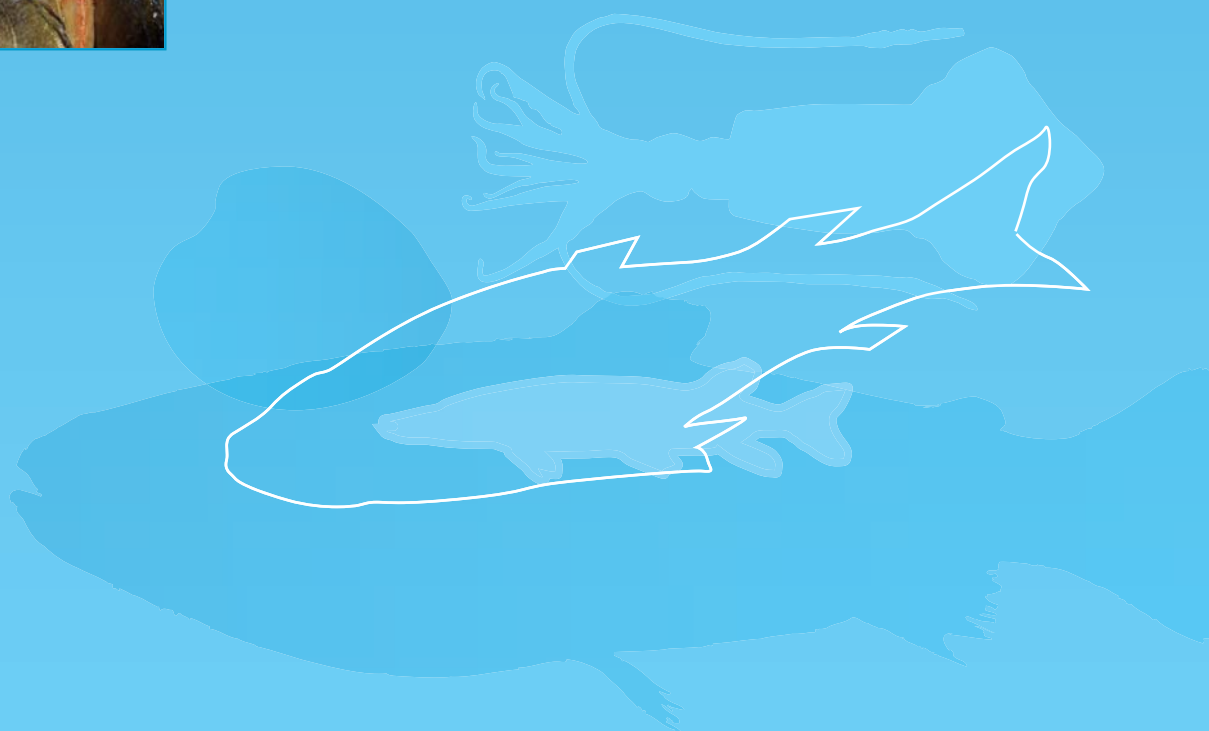


# Consumption

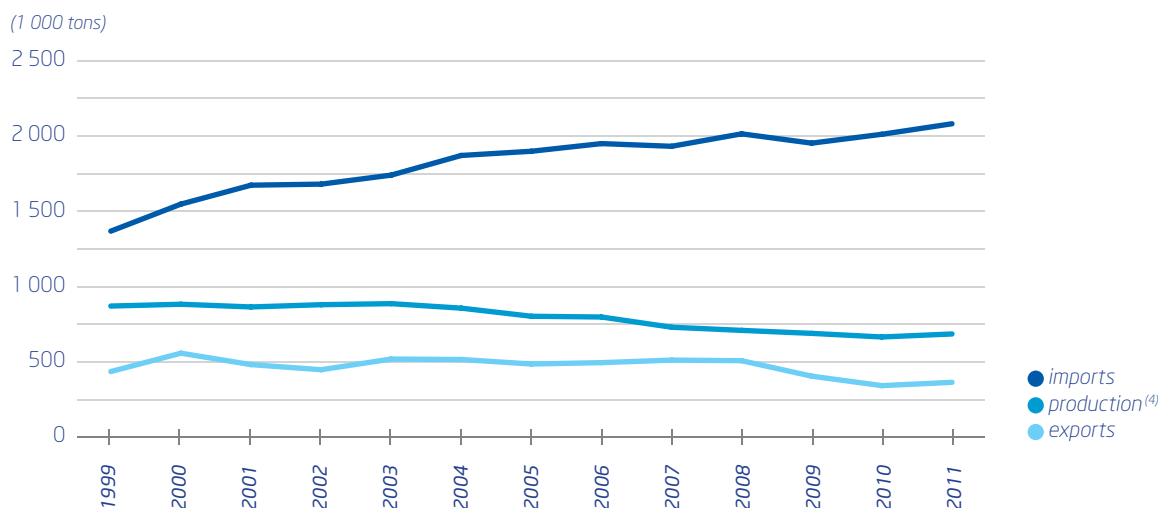


supply balance / purchases

households / catering / breakdown of purchases by distribution channel

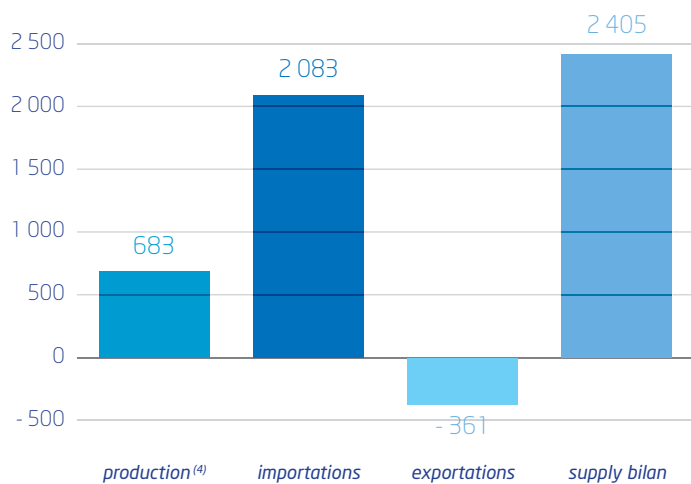


## Balance changes in production, imports and exports <sup>(1)(2)(3)</sup>

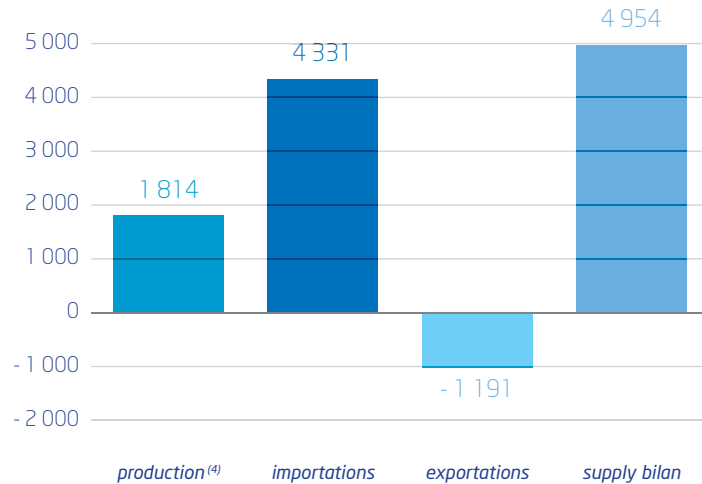


## Supply balance in 2011 <sup>(1)(2)(3)</sup>

in volume (1 000 tons)



in value (million euros)

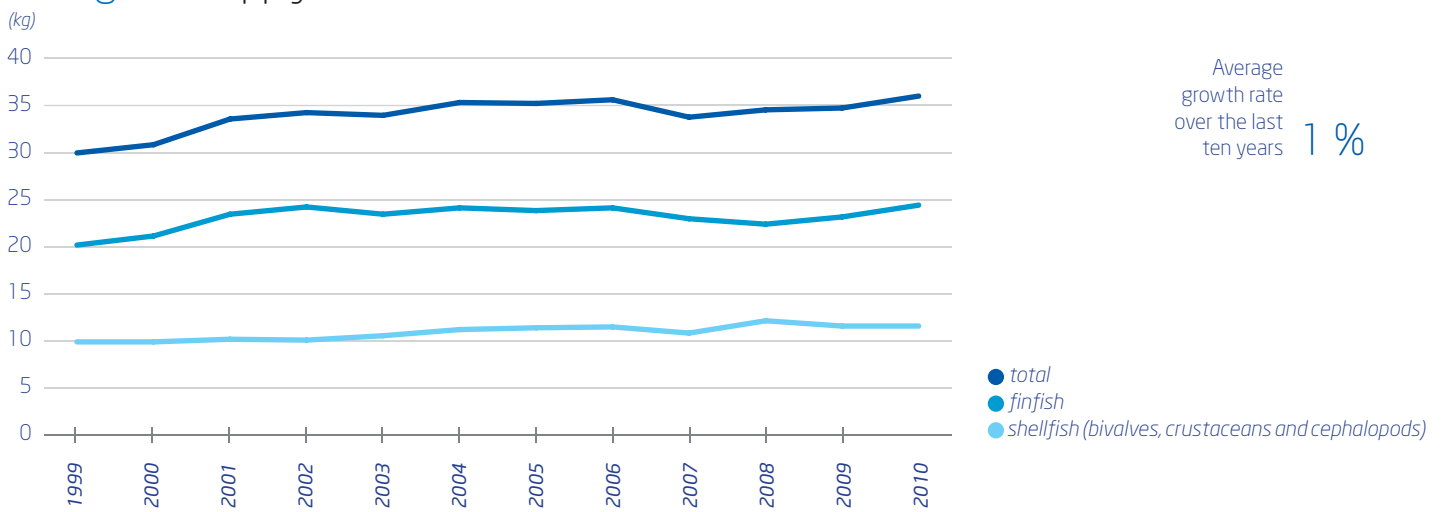


(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) excluding non food use - (4) estimates for 2011 - Source : FranceAgriMer

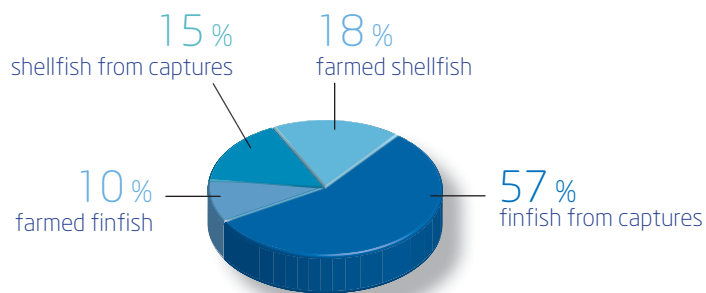
# Supply balance



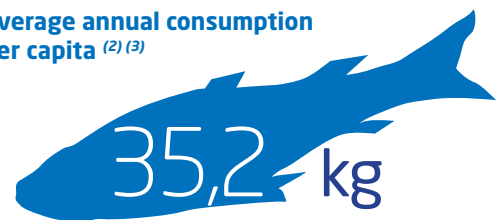
## Changes in supply balance <sup>(1)(2)(3)</sup>



## Breakdown by products in 2010 <sup>(1)(2)</sup>



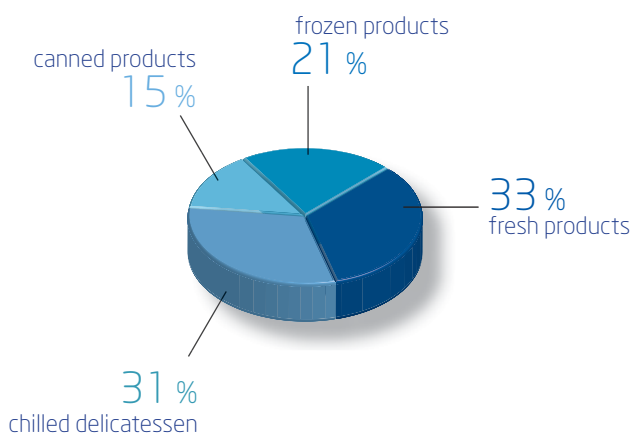
Average annual consumption per capita <sup>(2)(3)</sup>



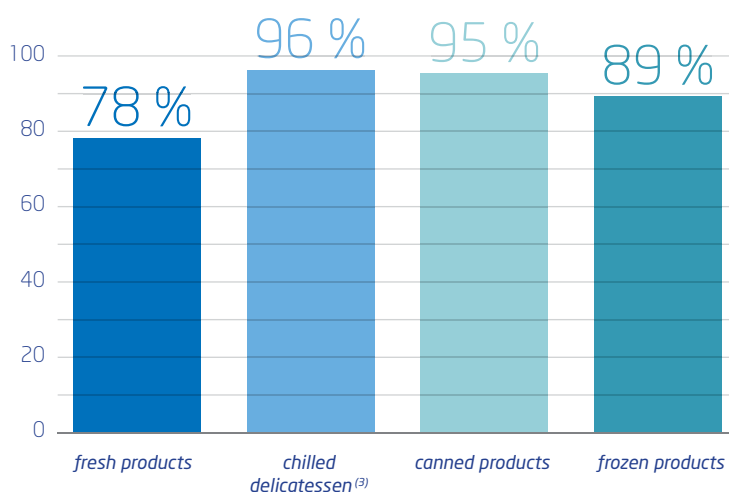
(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) average 2008-2010 - Source : FranceAgriMer



## Households spending in 2011 <sup>(1)</sup>



## Percentage of purchasing households in 2011 <sup>(2)</sup>

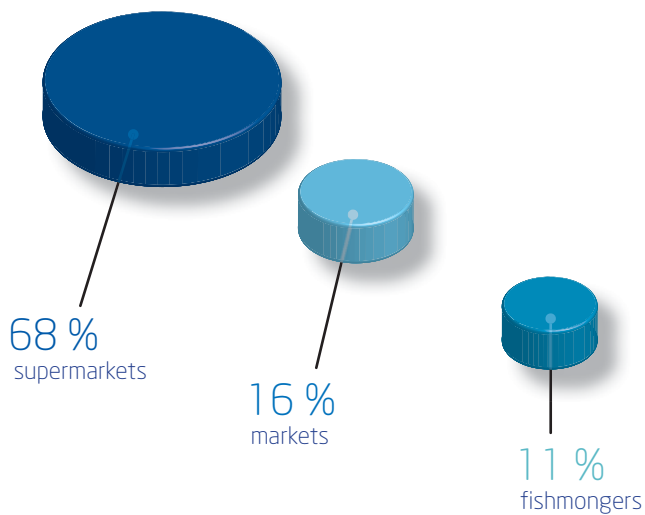


*(1) data collection methodology is detailed on inside back cover - (2) a purchasing households buys the product at least once a year - (3) with bar code  
Source : FranceAgriMer following Kantar Worldpanel*

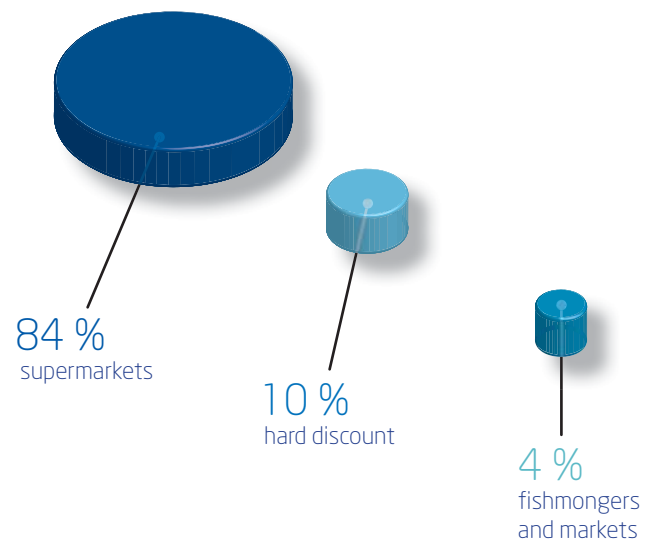
# Purchases by French households for home consumption

Purchases of aquatic products by french households for home consumption in 2011 <sup>(1)</sup>

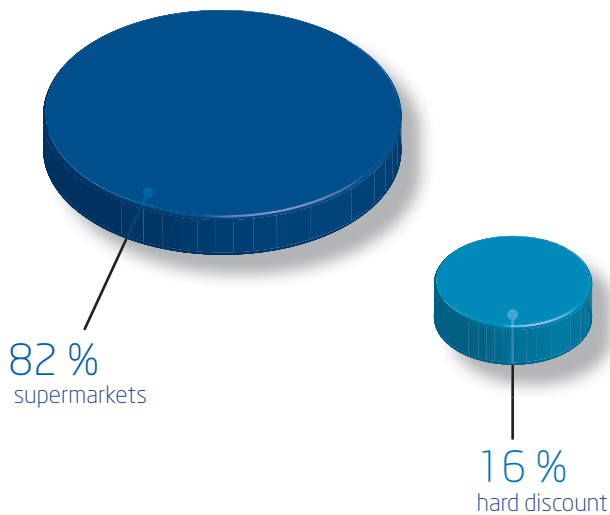
## Fresh products



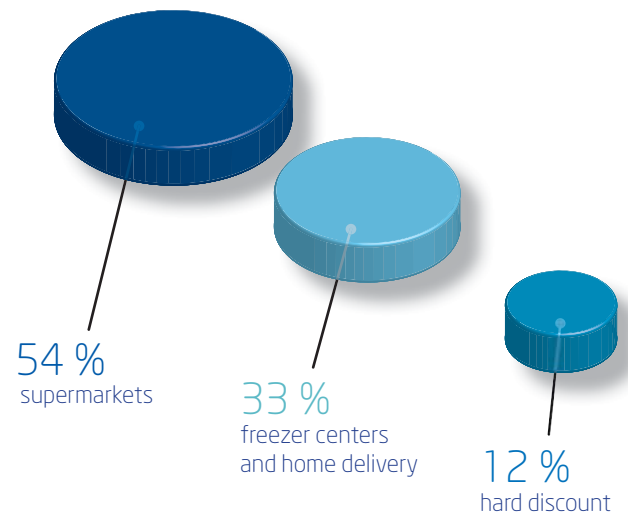
## Chilled delicatessen



## Canned products



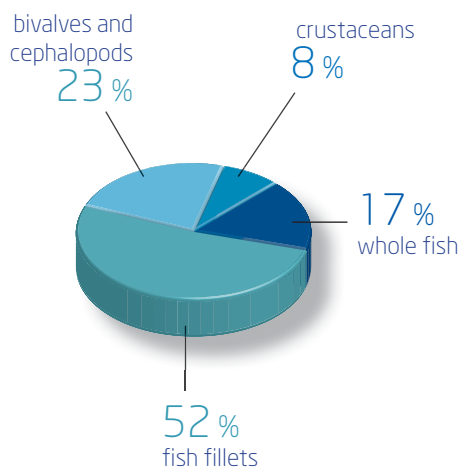
## Frozen products



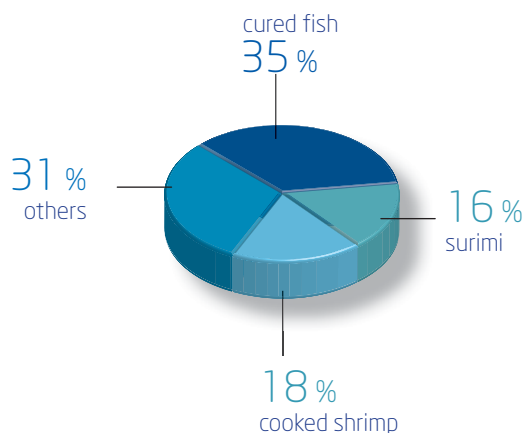
(1) data collection methodology is detailed on inside back cover - Source : FranceAgriMer following Kantar Worldpanel

## Breakdown of expenditures by presentation and species group in 2011 <sup>(1)</sup>

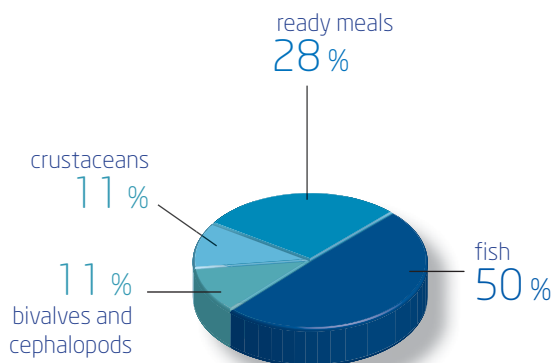
### Fresh products



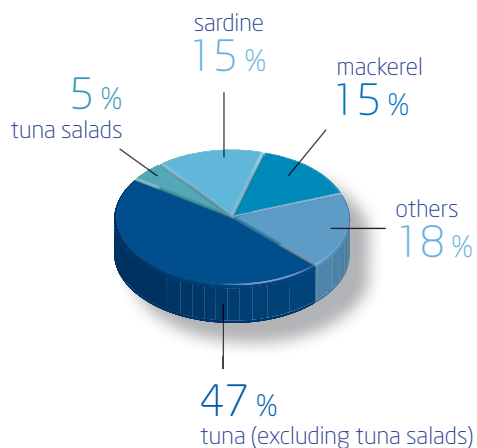
### Chilled delicatessen



### Frozen products



### Canned products

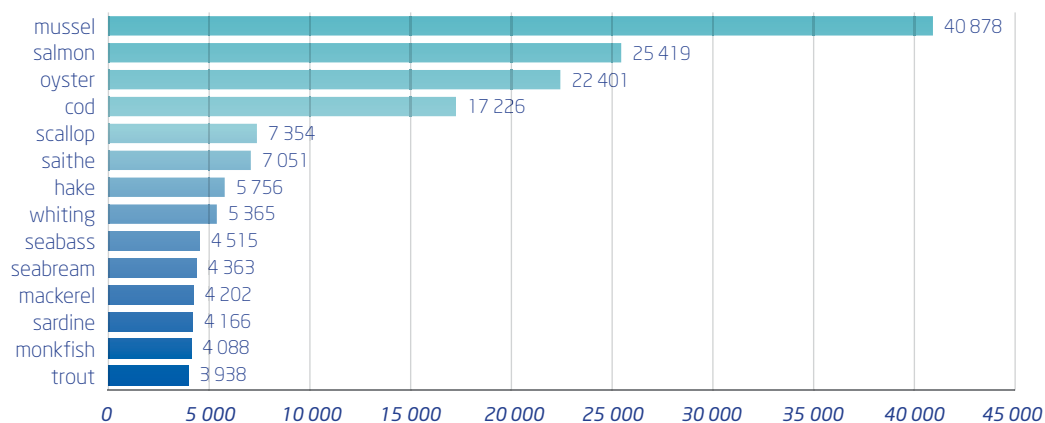


(1) data collection methodology is detailed on inside back cover - Source : FranceAgriMer following Kantar Worldpanel

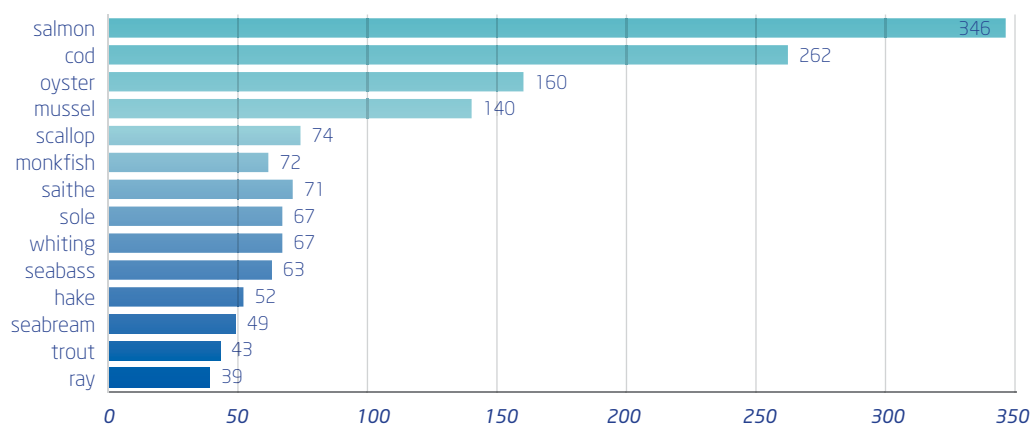
# Purchases by French households for home consumption in 2010

## Main species purchased fresh in 2011 <sup>(1)</sup>

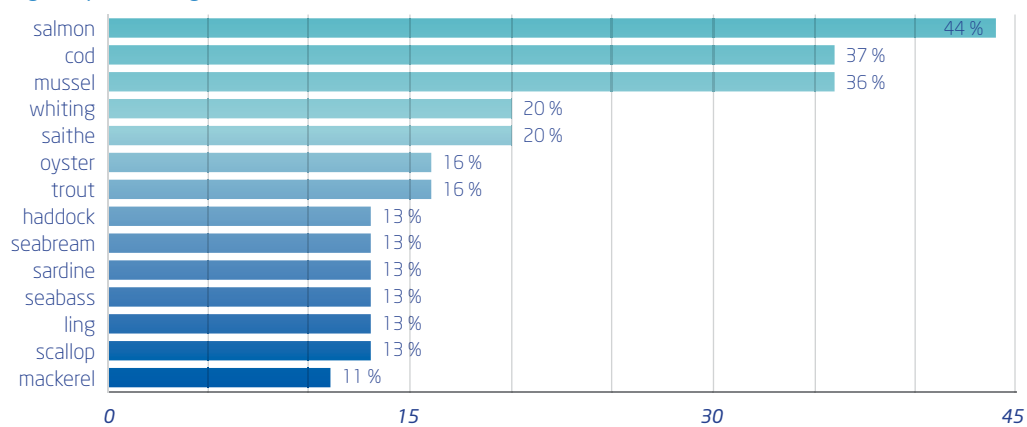
tons <sup>(2)</sup>



million euros



percentage of purchasing households

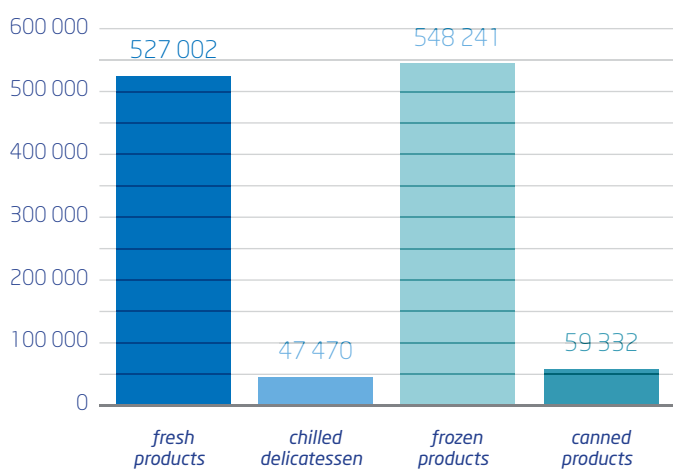


(1) data collection methodology is detailed on inside back cover - (2) net weight - Source : FranceAgriMer following Kantar Worldpanel

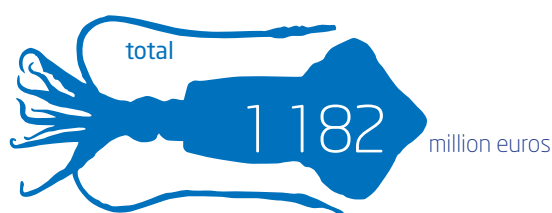
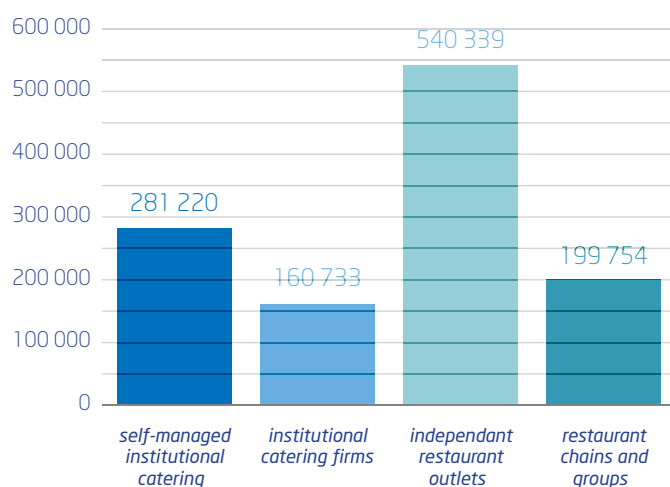


## Spending in 2010

by presentation (1 000 euros)



by catering outlet type (1 000 euros)



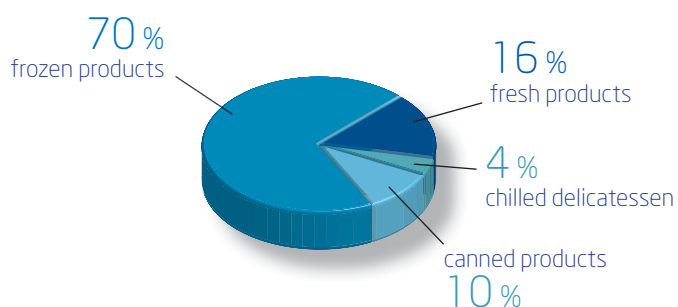
Source : FranceAgriMer following Crédoc



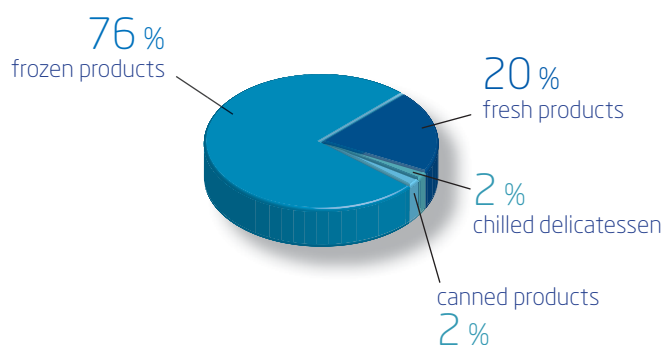
# Purchases of aquatic products by the catering sector

## Spending by catering outlet and by presentation in 2010

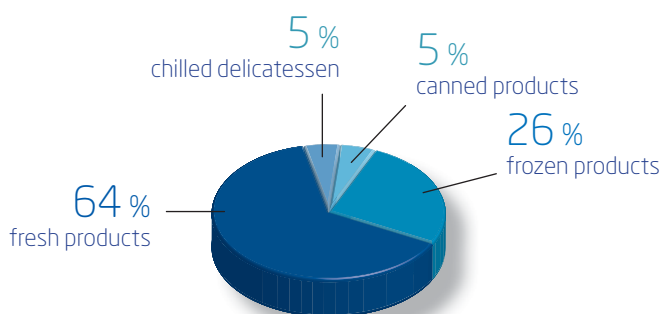
### Self-managed institutional catering



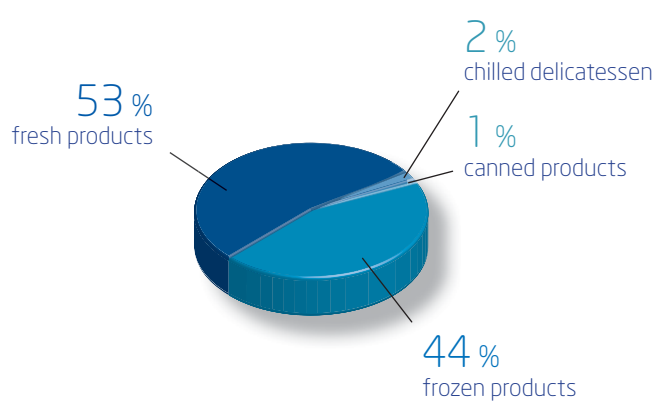
### Institutional catering firms



### Independant restaurant outlets



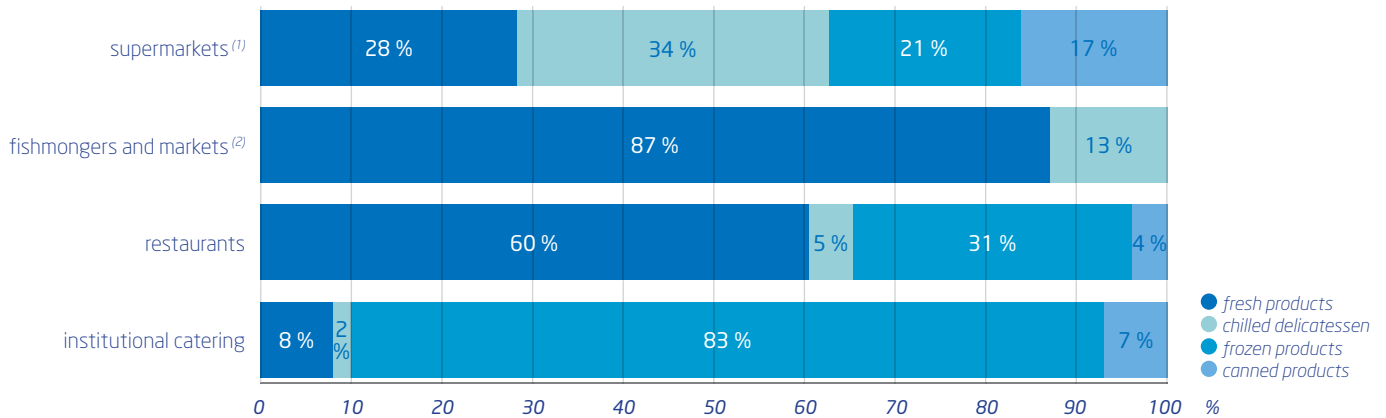
### Restaurant chains and groups



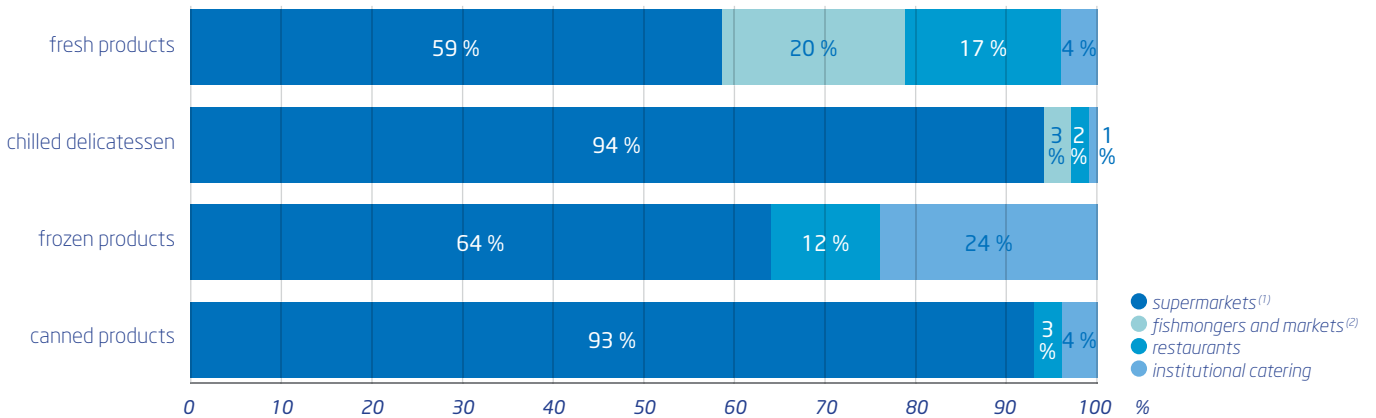
Source: FranceAgriMer following Crédoc

# Breakdown of purchases by distribution channel

Breakdown of purchases by presentation for different outlets (value)



Breakdown of purchases by outlet for different presentations (quantities)<sup>(3)</sup>



(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

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**Data** Included data are the last available in april 2012.  
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**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 2011 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 2011 des ventes déclarées en halles à marée\*
- Bilan annuel FranceAgriMer 2011 du commerce extérieur des produits de la pêche et de l'aquaculture\*
- Bilan annuel FranceAgriMer 2011 de la consommation des produits de la pêche et de l'aquaculture\*

\* coming 2012  
.....

**DPMA** Direction des Pêches maritimes et de l'aquaculture du ministère de l'Agriculture, de l'Alimentation, de la Pêche, de la Ruralité et de l'Aménagement du territoire

**SDSIM** Sous-direction des systèmes d'information maritimes du ministère de l'Écologie, du Développement durable, des Transports et du Logement

**IFREMER** Institut français de recherche pour l'exploitation de la mer

