

The fisheries and aquaculture sector in France

> EDITION april 2014



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Consumption

Summary

Production

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

Firms

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Fishmonger firms
Trading firms
Processing firms

Trade

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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

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

Production



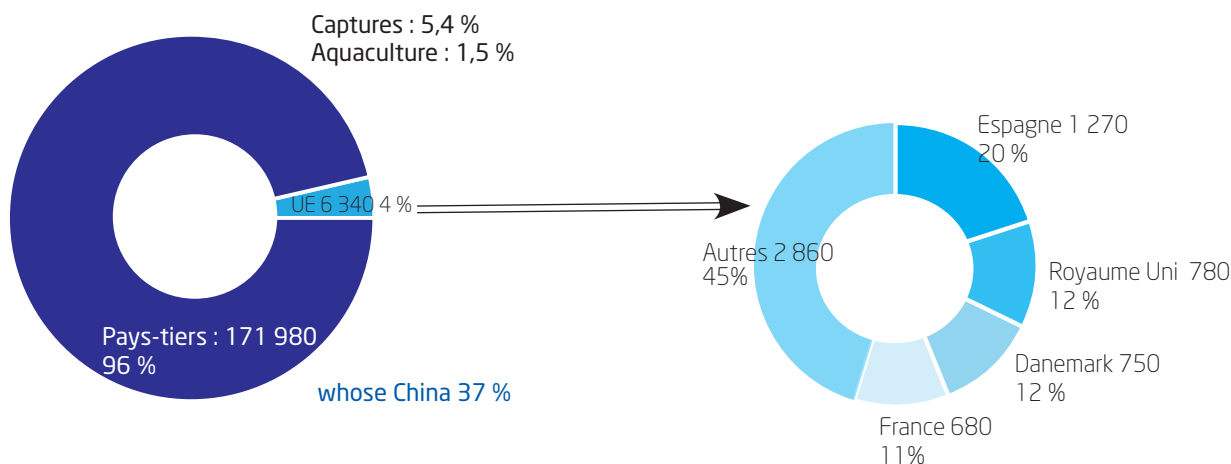
fishing fleet /
aquaculture firms / jobs

total sales of fisheries and aquaculture products



France in the EU-27 and in the world in 2011

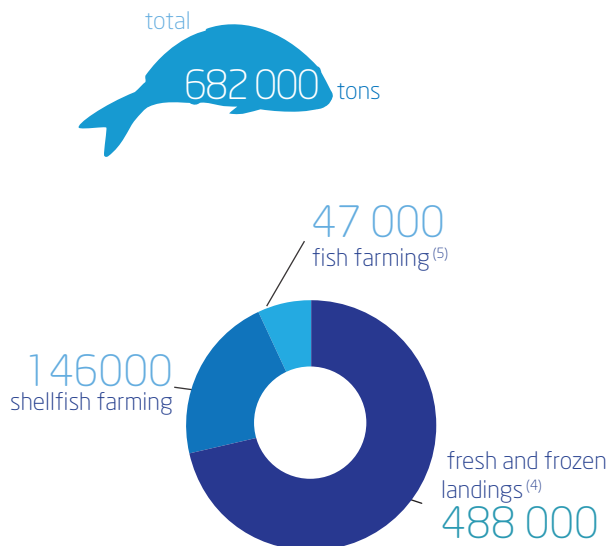
volume en 1 000 tonnes et % du total



Source : FAO

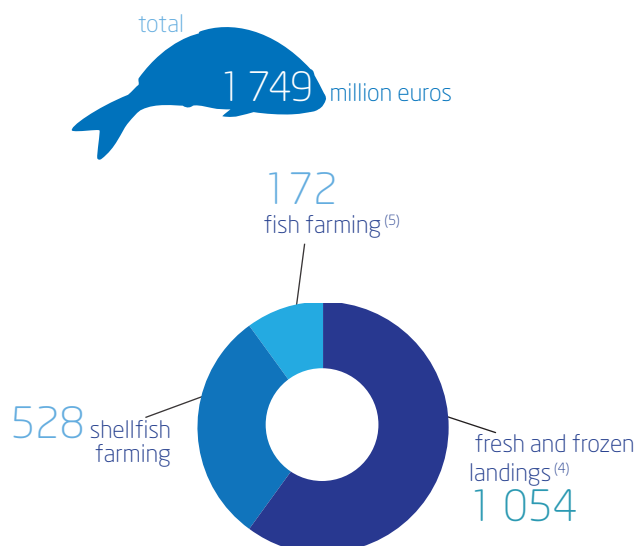
Quantities sold in 2011/12 ⁽¹⁾⁽²⁾

by method of production ⁽³⁾ (tons)



Value of sales in 2011/12 ⁽¹⁾⁽²⁾

by method of production ⁽³⁾ (million euros)



(1) excluding seaweeds - (2) data 2012 for fishing and 2011 for fish farming - (3) equivalent live weight - (4) sales, sales to processing industry and export sales

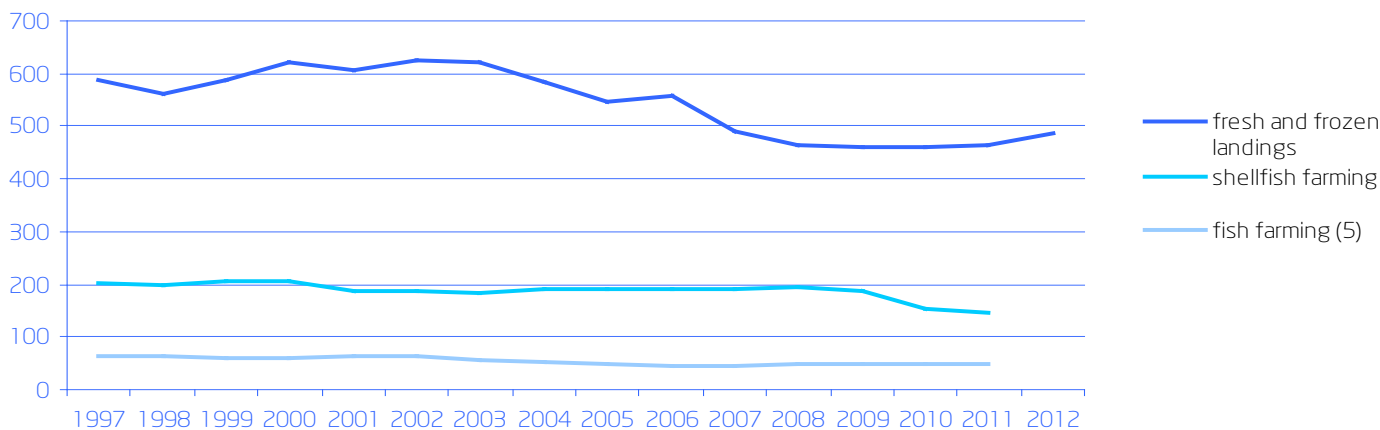
(5) including farmed crustaceans

Source : MEDDE / DPMA / BSPA

Total sales / metropolitan France and overseas territories

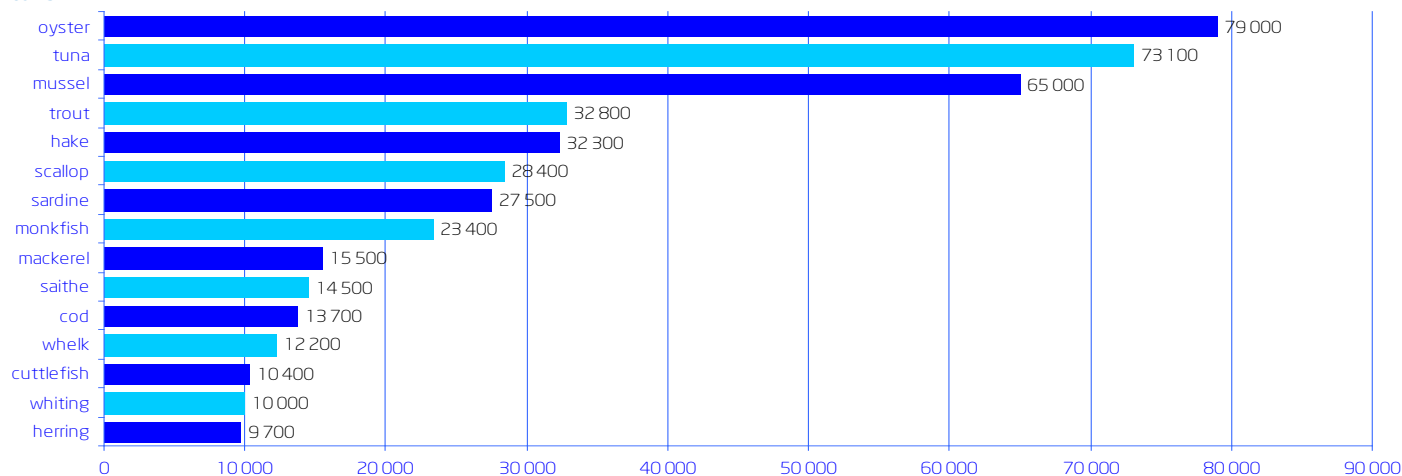
Changes in quantities sold in metropolitan France ⁽¹⁾⁽²⁾

(1 000 tons) ⁽³⁾

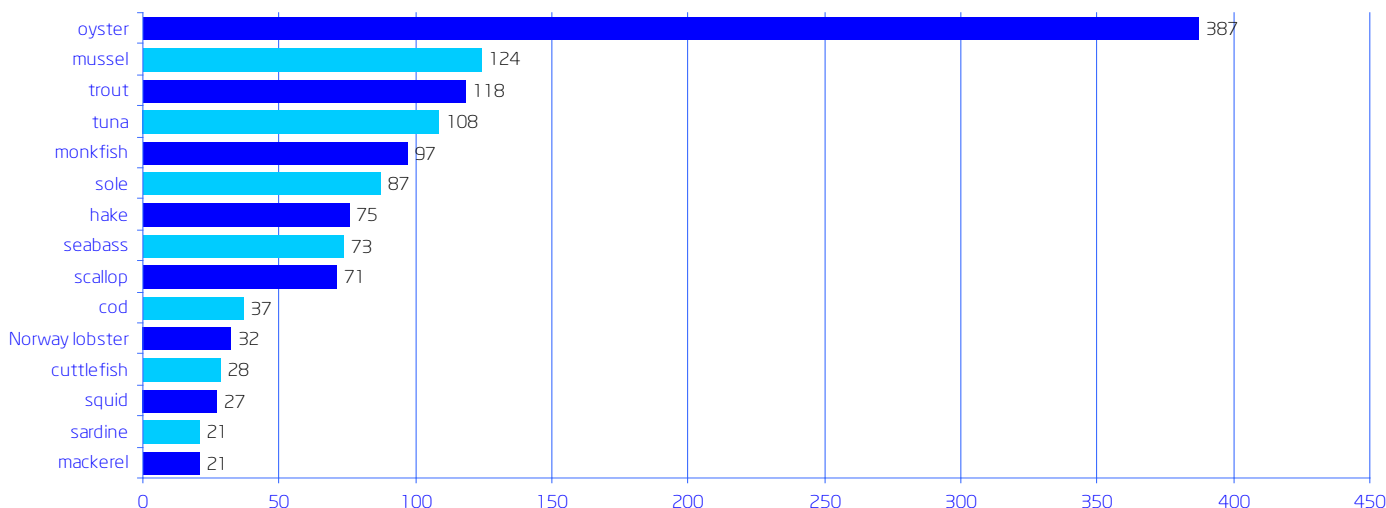


Main species sold ⁽²⁾⁽³⁾⁽⁴⁾

tons



million euros



(1) excluding seaweeds - (2) data 2012 for fishing and 2011 for fish farming - (3) equivalent live weight - (4) sales, sales to processing industry and export sales

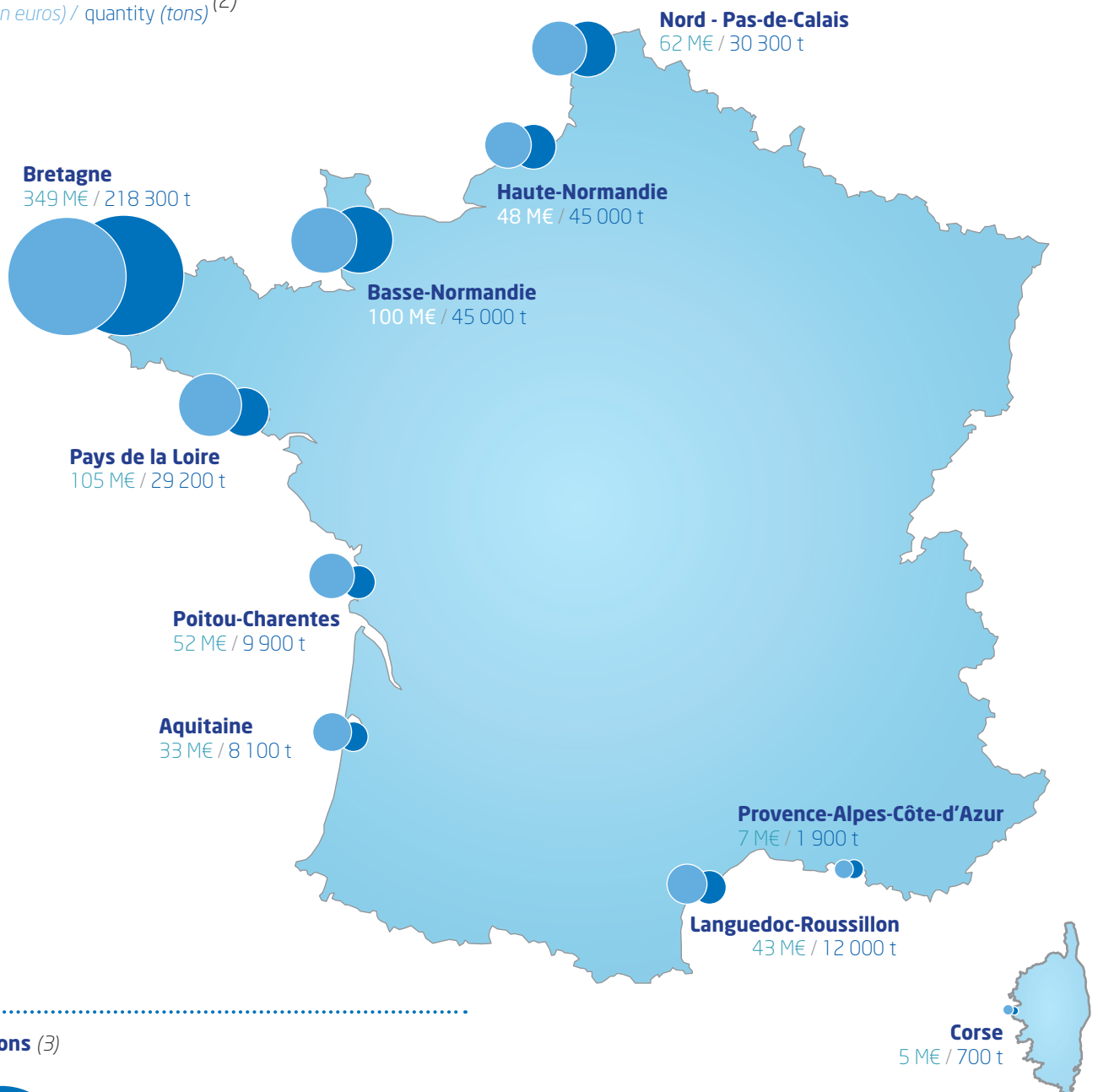
(5) including farmed crustaceans -

Source: MEDDE / DPMA / BSPA

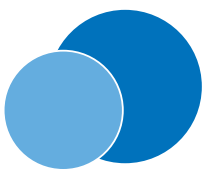
Fresh and frozen landings in 2012⁽¹⁾

Sales

value (million euros) / quantity (tons)⁽²⁾



Other regions⁽³⁾



250 M€ / 112 900 t

⁽¹⁾ excluding seaweeds and freshwater fishing -

⁽²⁾ equivalent live weight

⁽³⁾ including sales in overseas territories and foreign sales

Source: MEDDE / DPMA / BSPA

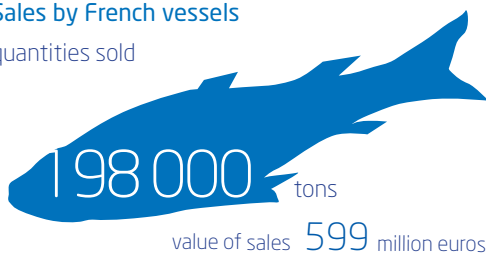
Sales of fishery products

Sales of fishery products at auction in 2013

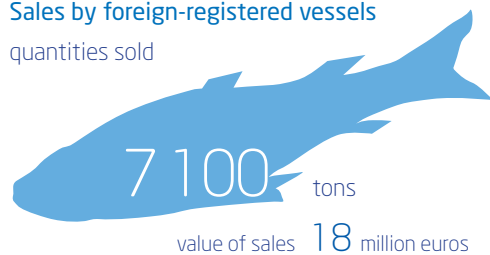
Number of auctions in 2013 : 39



Sales by French vessels
quantities sold



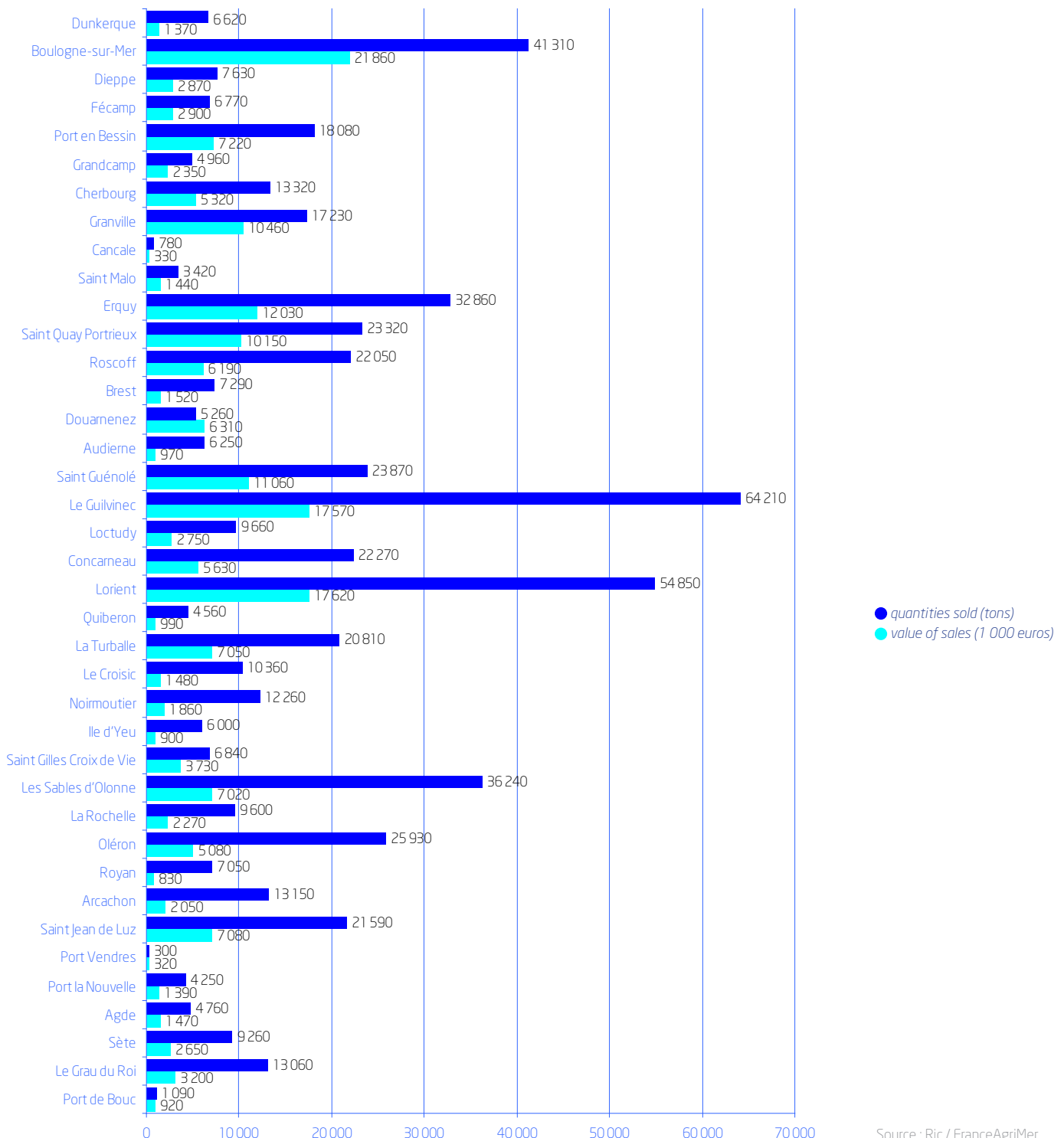
Sales by foreign-registered vessels
quantities sold



Source : Ric / FranceAgriMer



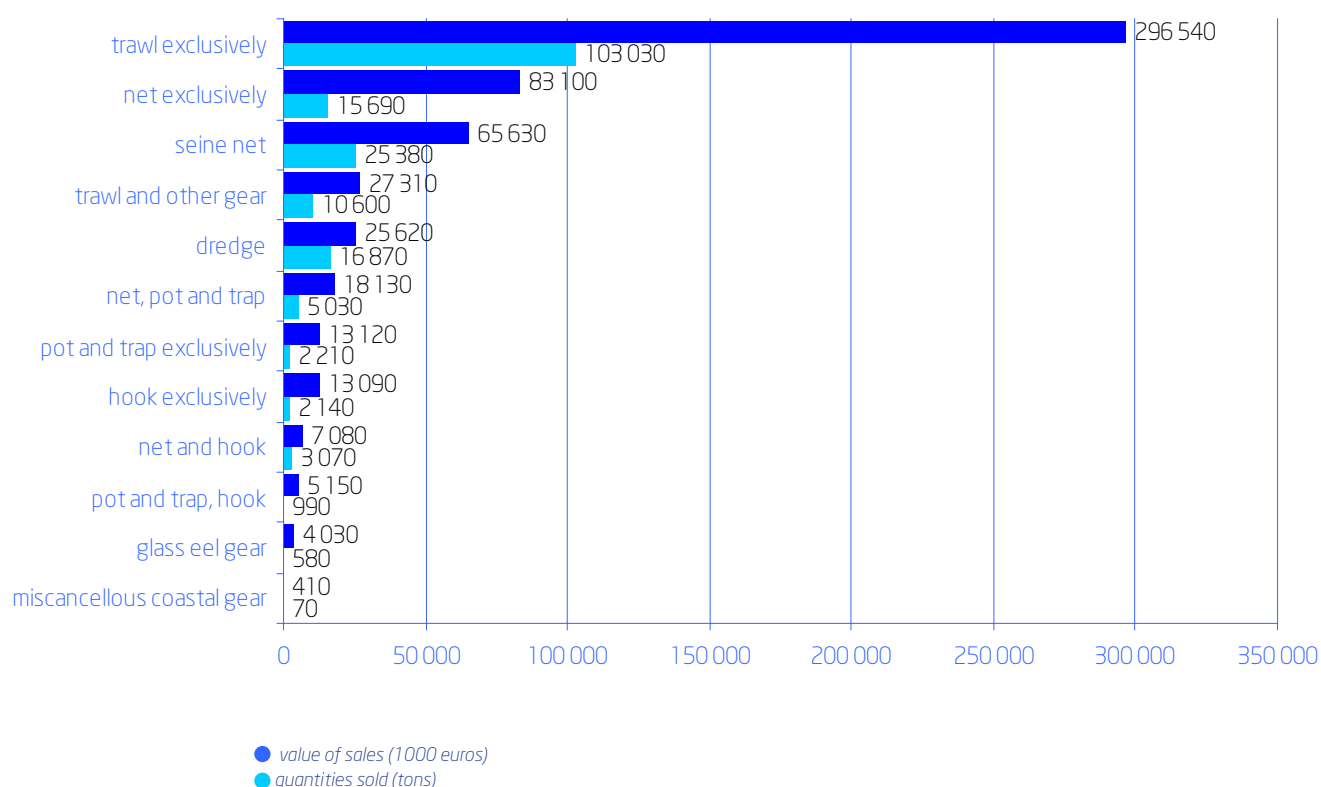
Quantities sold and value of sales by french vessels at the main auctions in 2013



Source : Ric / FranceAgriMer

Sales of fishery products

Breakdown of quantities sold and value of sales at auction in 2013 by fleet segment ⁽¹⁾⁽²⁾⁽³⁾



Number of vessels (sales at auction in 2013) ⁽¹⁾⁽²⁾⁽³⁾

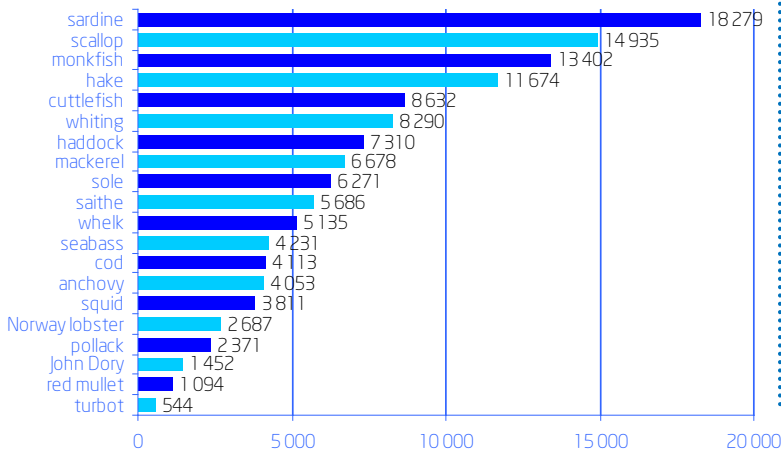
trawl exclusively	447
net exclusively	333
trawl and other gear	408
seine net	41
dredge	293
net, pot and trap	223
net and hook	106
hook exclusively	149
pot and trap exclusively	85
pot and trap, hook	72
glass eel gear	114
miscellaneous coastal gear	29
total	2 300

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

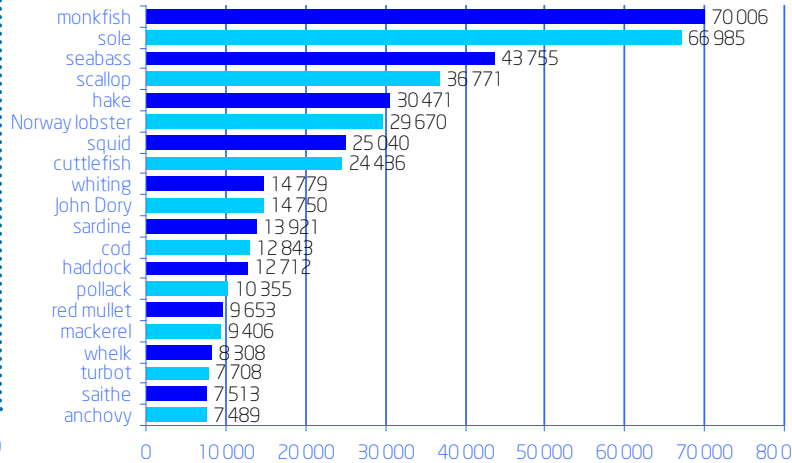
Sources : FranceAgriMer, Ifremer

Main species sold at auction by French vessels in 2013

Quantities sold (tons)

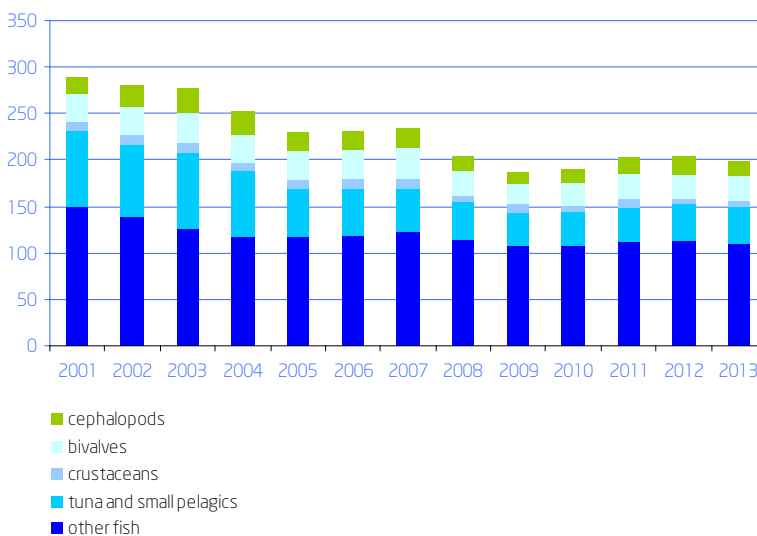


Value of sales (1 000 euros)



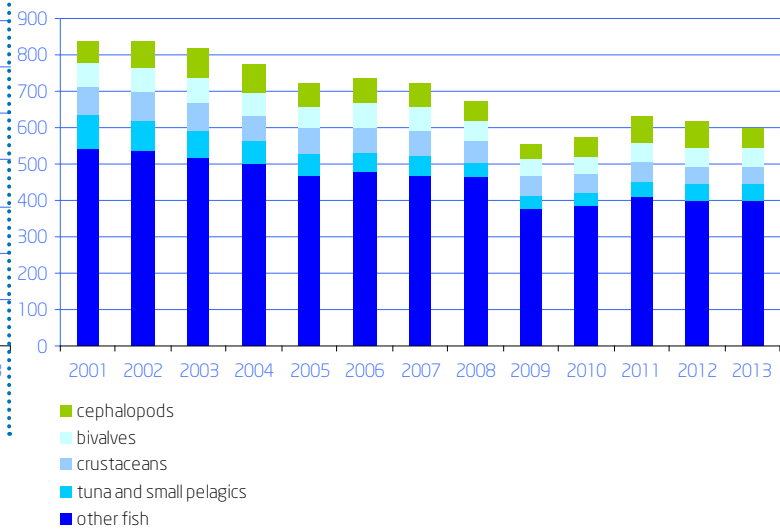
Changes in quantities sold by the French vessels by species group

(1 000 tons)



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

(million euros)

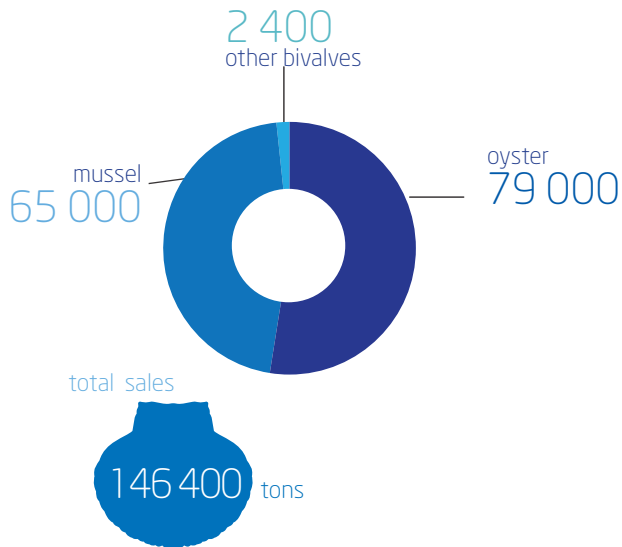


Source : Ric / FranceAgriMer

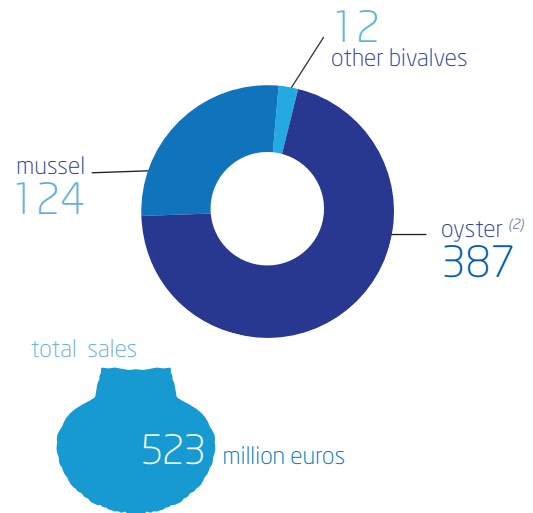
Sales of aquaculture products in metropolitan France

Shellfish farming

Quantities sold for consumption (tons)⁽¹⁾

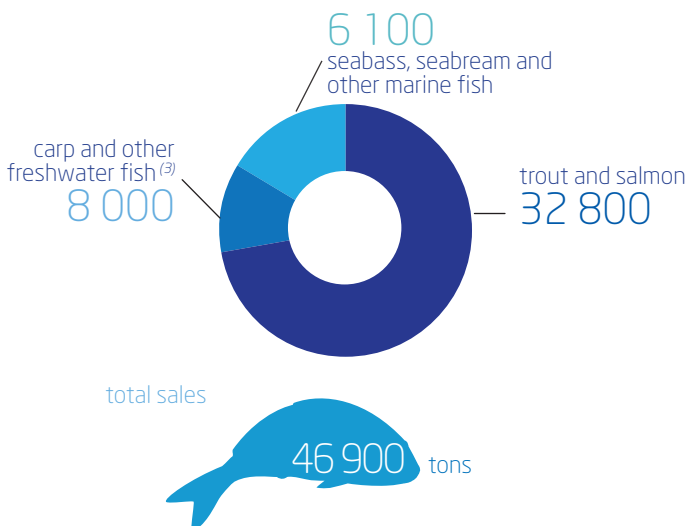


Value of sales (million euros)

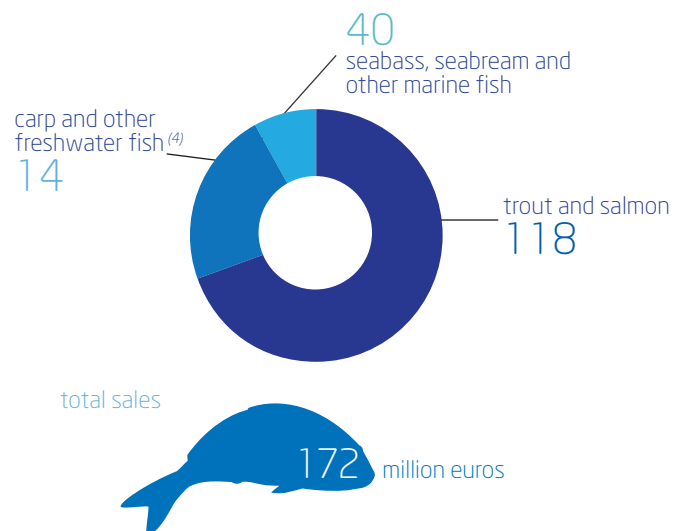


Fish farming

Quantities sold in 2010 (tons)⁽¹⁾⁽³⁾



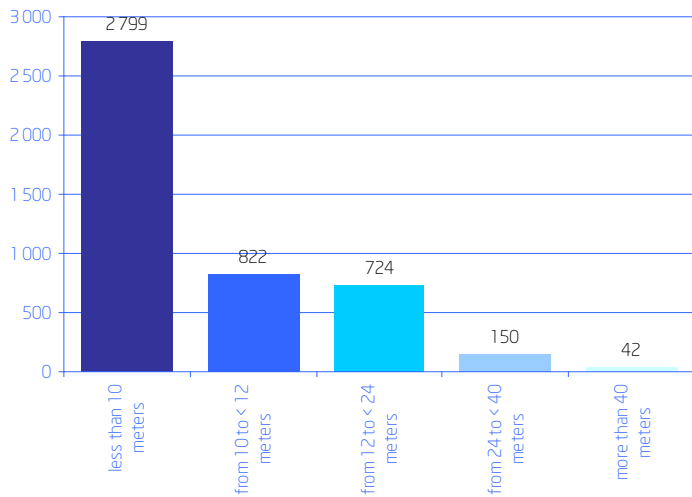
Value of sales in 2010 (million euros)



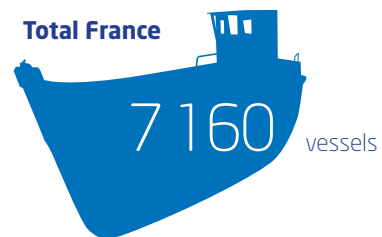
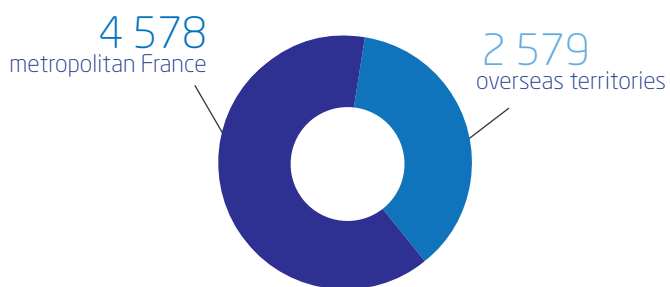
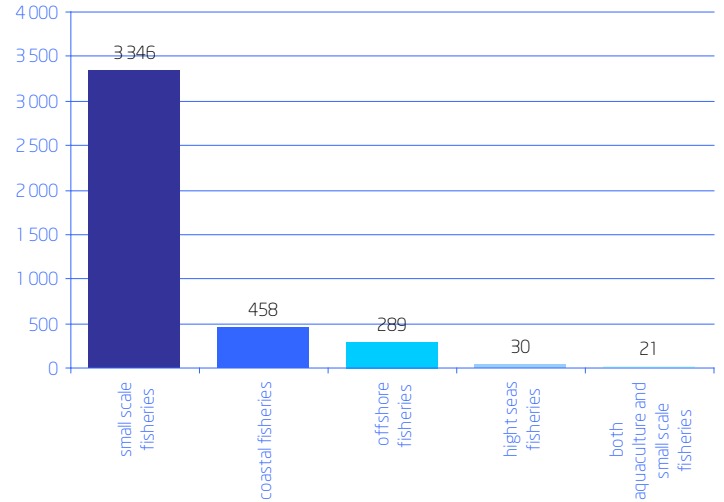
(1) equivalent live weight - (2) excluding grant aids - (3) total sales (consumption, repopulation, recreational fishing, sales to another farmer) (4) including farmed crustaceans
Source : MEDDE / DPMA / BSPA (aquaculture survey 2011)

Fishing fleet in 2013

Breakdown of total vessels by length (metropolitan France)



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



Small scale fisheries out of port \leq 24 hours

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

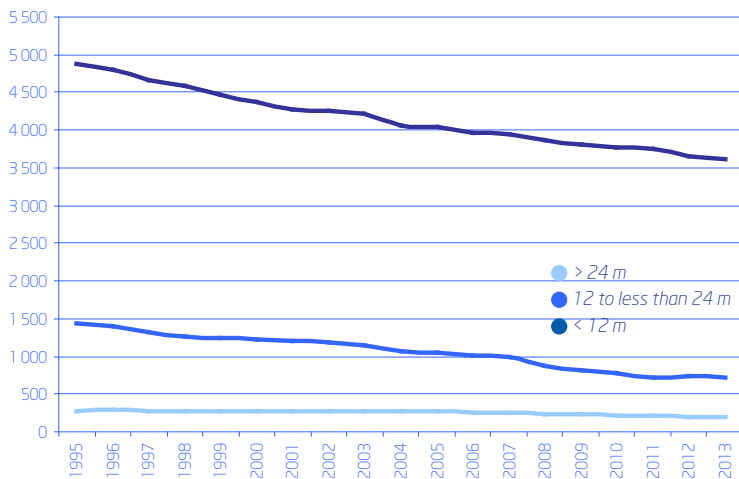
Offshore fisheries out of port > 96 hours

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

Source : MEDDE / DAM / SDSIM (Fichier BARPOP)

Fishing fleet / Aquaculture firms

Changes in the number of fishing vessels in metropolitan France



Source : MEDDE / DAM / SDSIM (Fichier BARPOP)

	< 12 m	12 to less than 24 m	> 24 m
1995	4878	1434	281
1996	4795	1395	285
1997	4656	1318	279
1998	4583	1258	277
1999	4461	1239	271
2000	4380	1233	270
2001	4271	1201	272
2002	4256	1179	275
2003	4209	1155	277
2004	4069	1068	274
2005	4034	1057	269
2006	3967	1006	259
2007	3939	991	257
2008	3862	876	241
2009	3815	817	225
2010	3769	773	209
2011	3747	721	207
2012	3645	741	192
2013	3621	724	192

Aquaculture firms

shellfish farming - including seaweed and shrimps

2 938

marine fish farming and sturgeon

39

continental salmonids farming

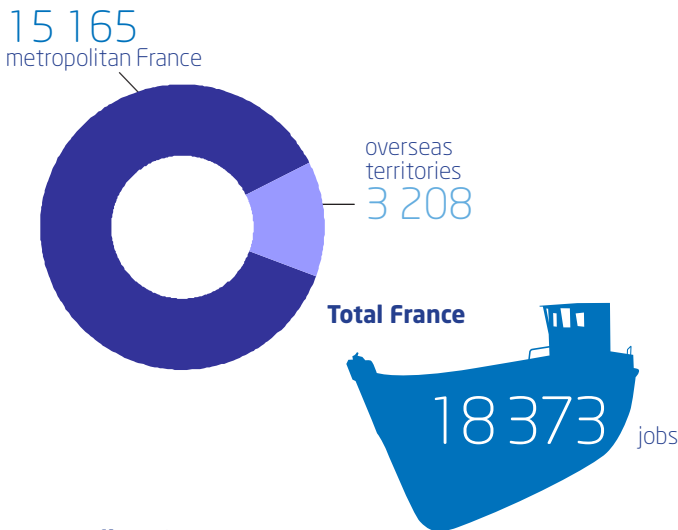
400

Source : MEDDE / DPMA / BSPA (aquaculture survey 2011)

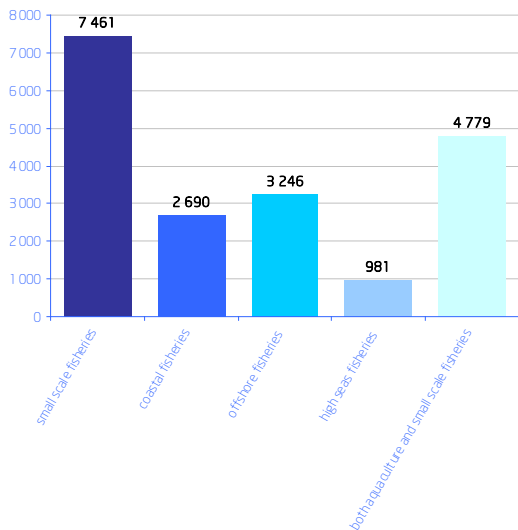


Jobs

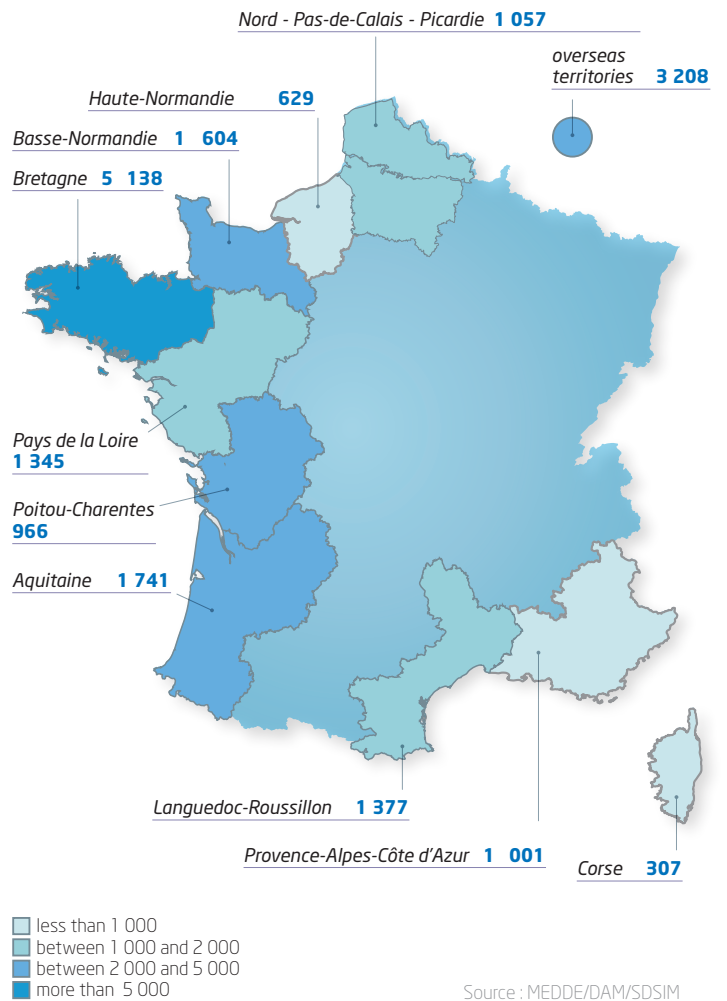
Number of seamen employed on board French fishing vessels in 2012 (seamen of all nationalities)



Metropolitan France



Regional sharing



Source : MEDDE/DAM/SDSIM

Number of full time equivalent jobs in 2011 ⁽¹⁾

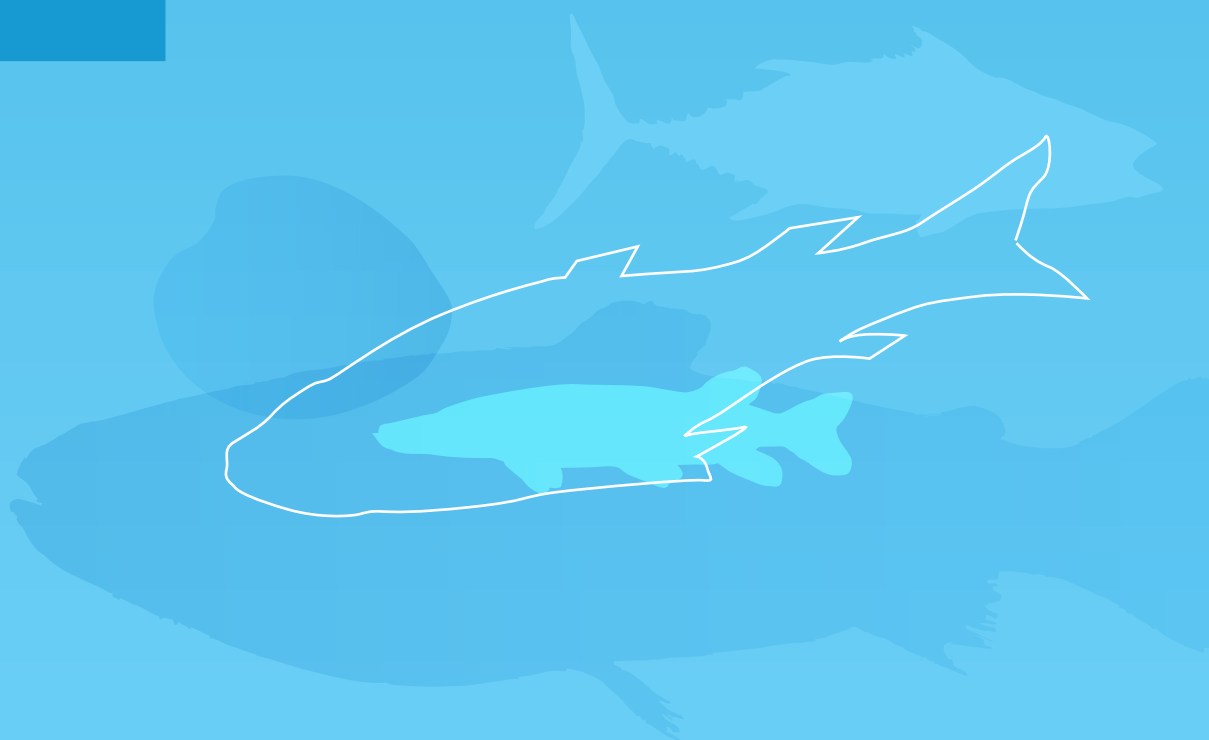
	jobs	FTEJ
shellfish farming	17 005	9 213
marine fish farming and sturgeon	677	604
continental salmonids farming	1 815	1 323

(1) including seasonal jobs

Source : MEDDE/DPMA/BSPA (aquaculture survey 2011)

Firms

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



Fishmonger's in 2010

number of establishments



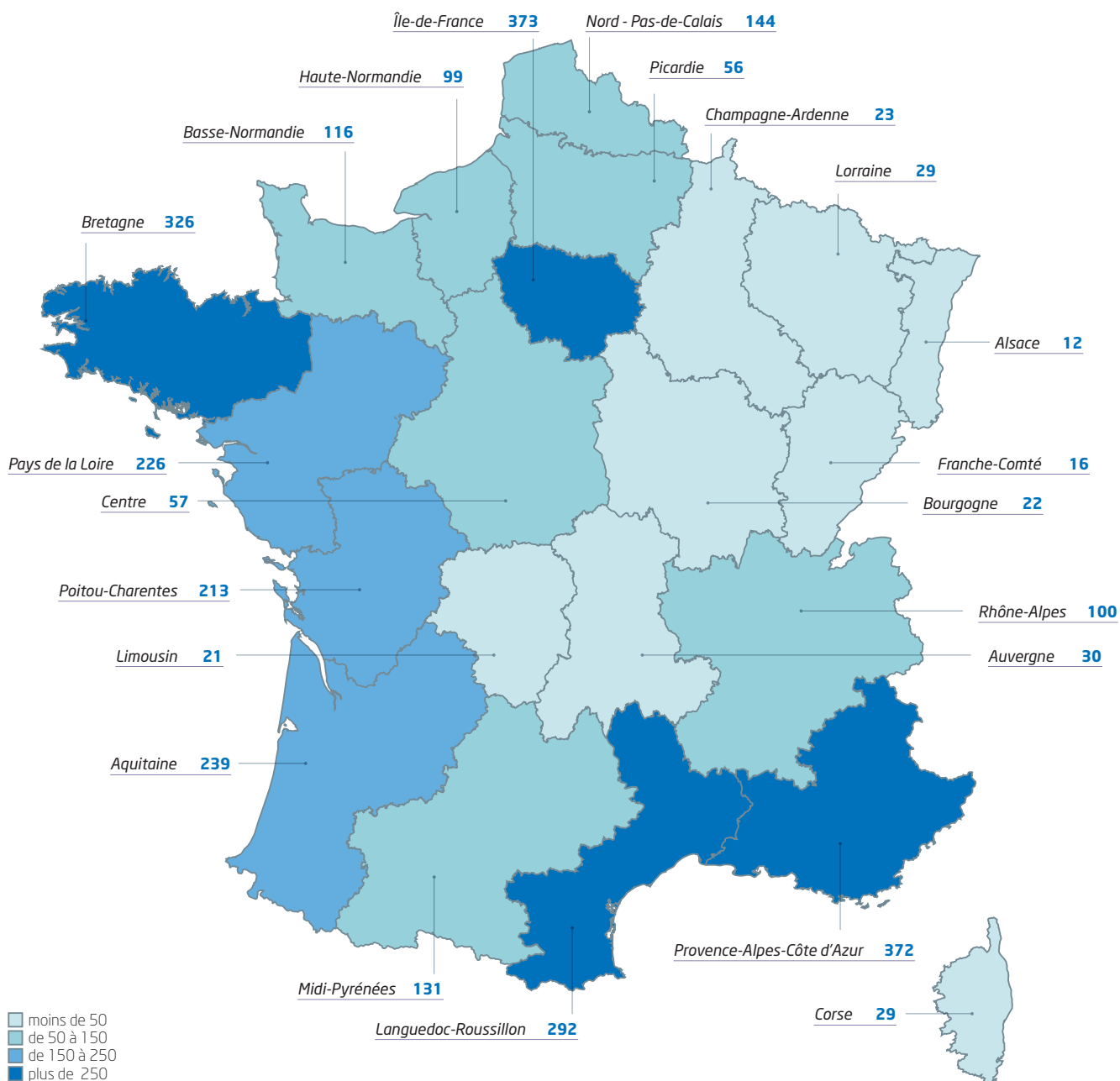
net sales



full time equivalent jobs



Number of establishments per region

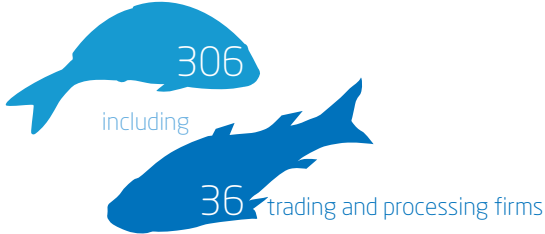


Sources : Via.Aqua and Proteis for FranceAgriMer

Trading firms

Trading firms in 2011

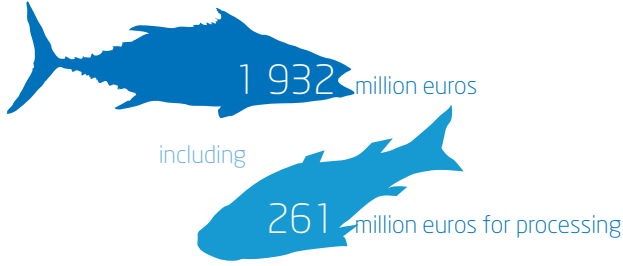
number of firms



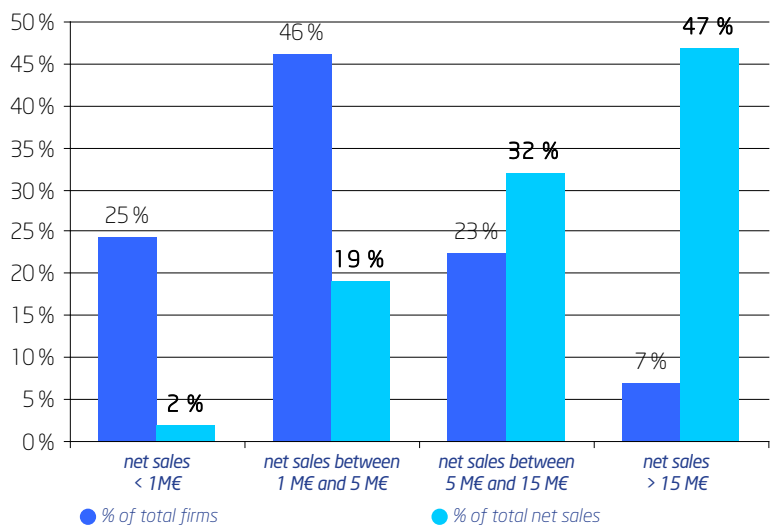
jobs



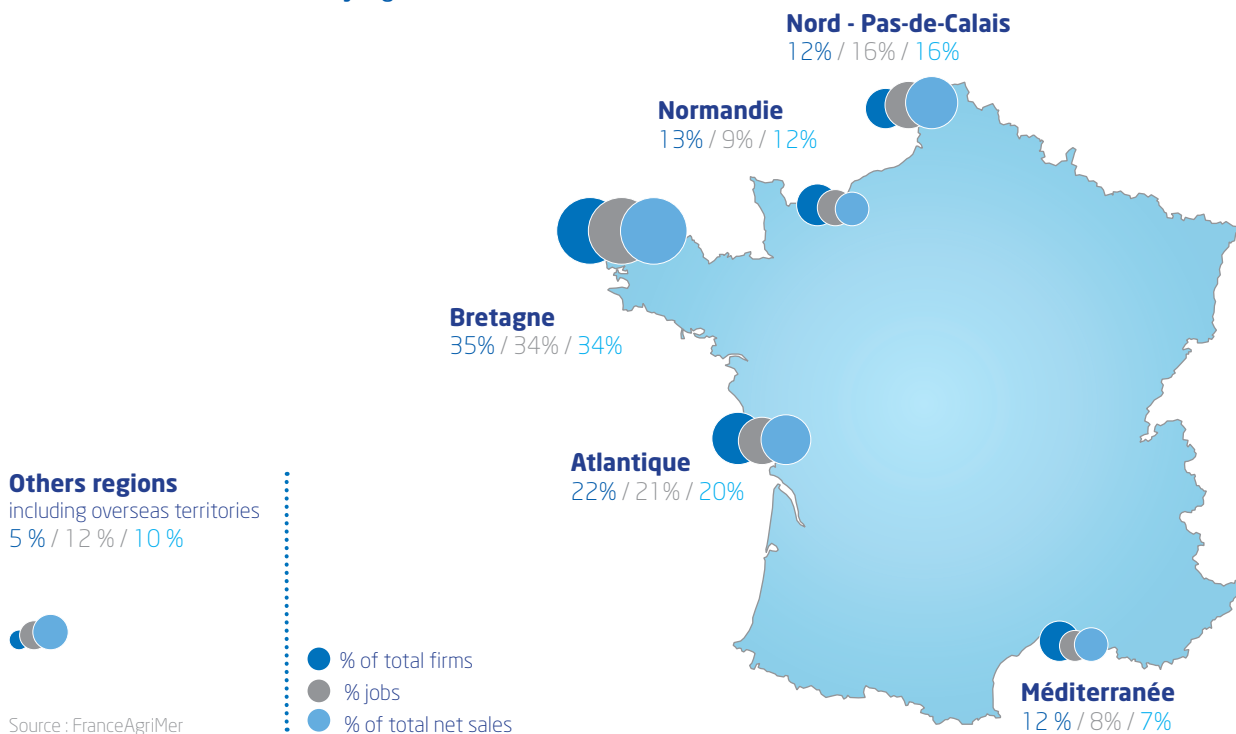
net sales



Breakdown of firms by total net sales

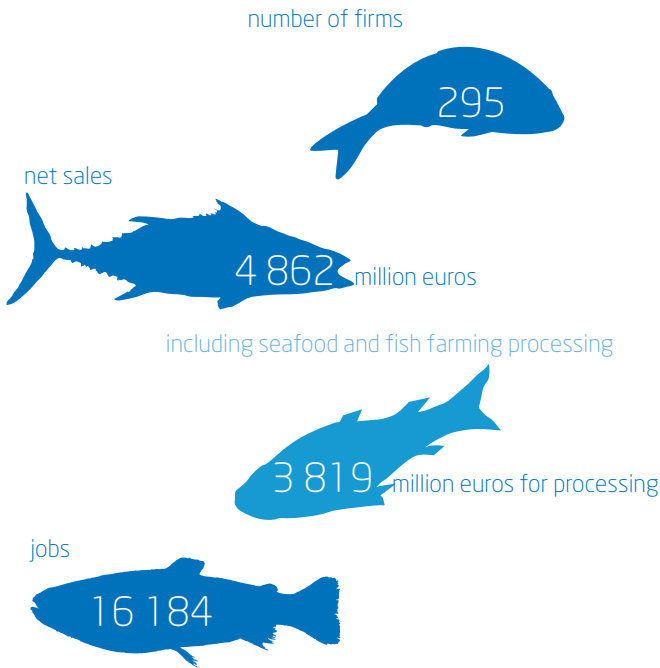


Breakdown of firms and total net sales by region

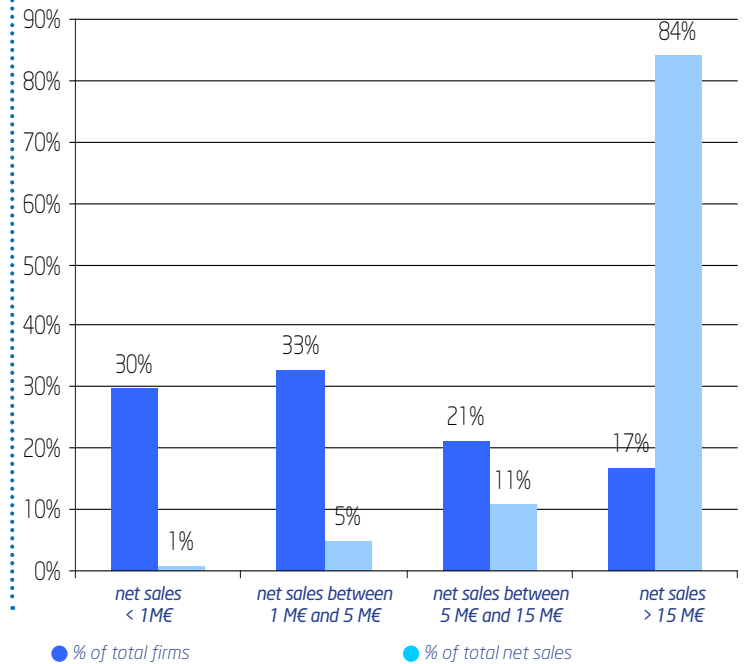


Source : FranceAgriMer

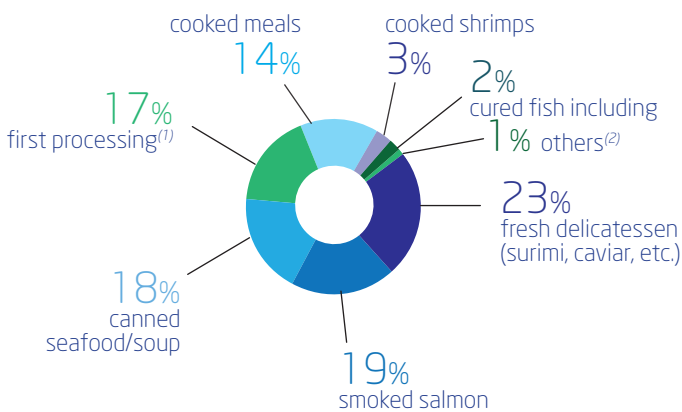
Processing main activity firms in 2012



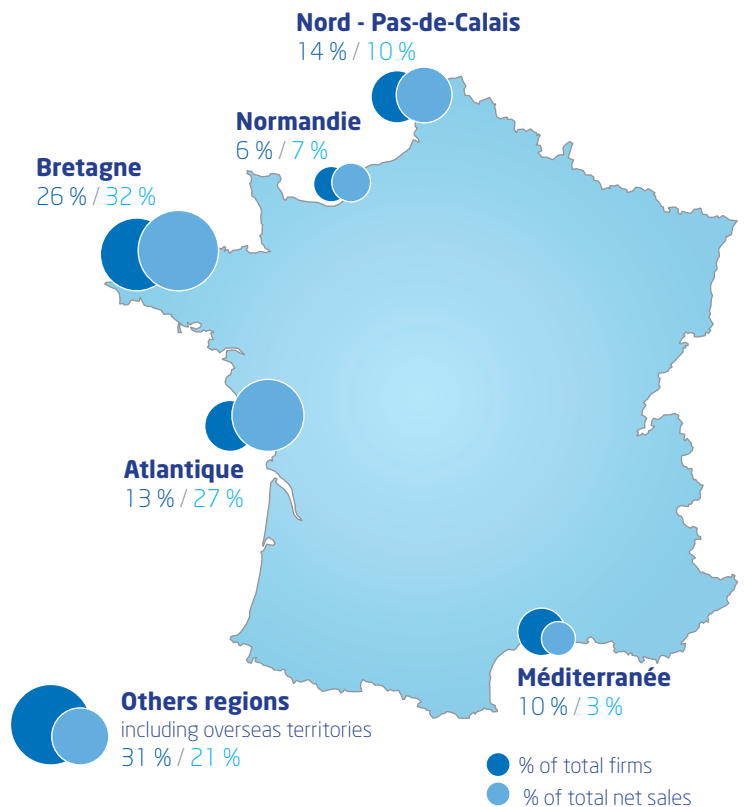
Breakdown of firms by total net sales



Seafood processing net sales



Breakdown of processing firms and sales by region



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

(2) seaweeds, in fish products, others

Source : FranceAgriMer

Trade

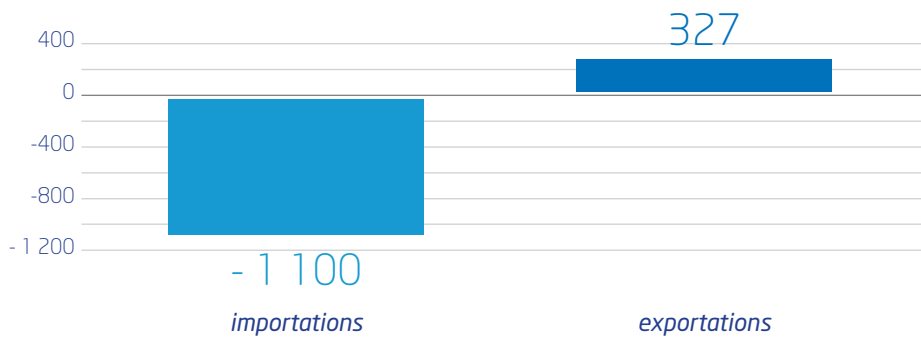
imports / exports

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

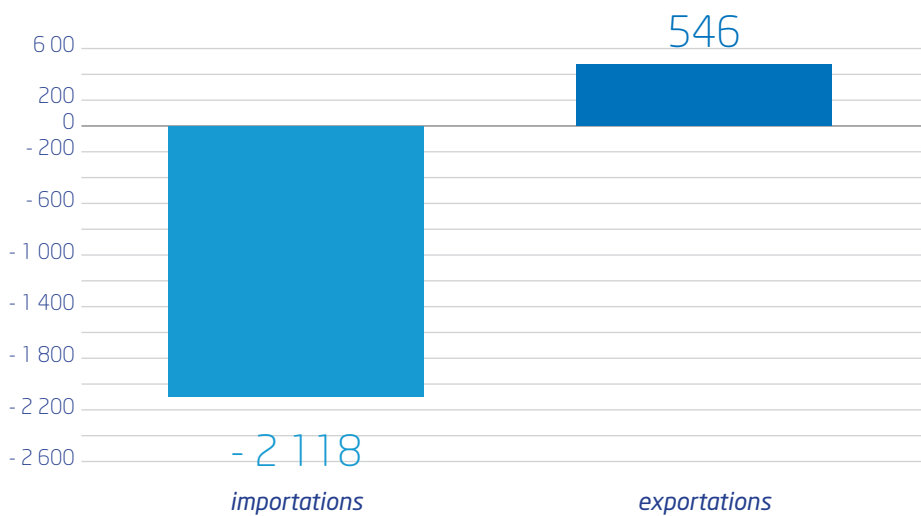


Supply balance in 2013

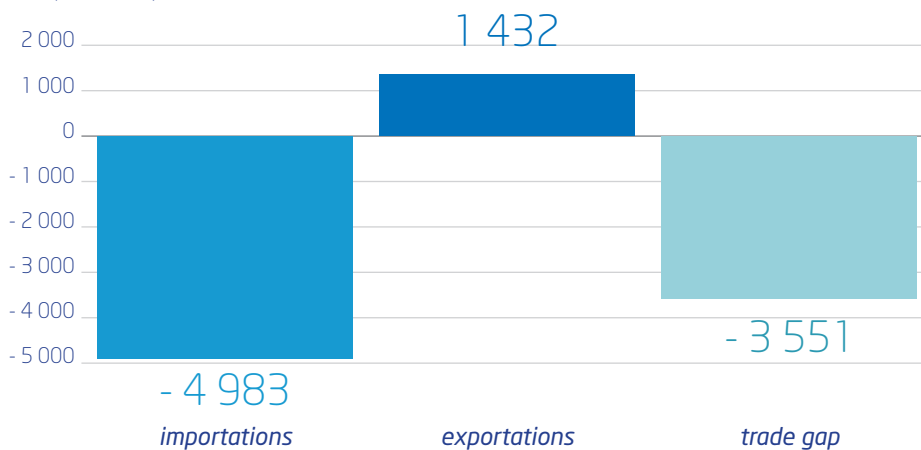
Net weight (1 000 tons)



Live weight (1 000 tons)



Value (million euros)

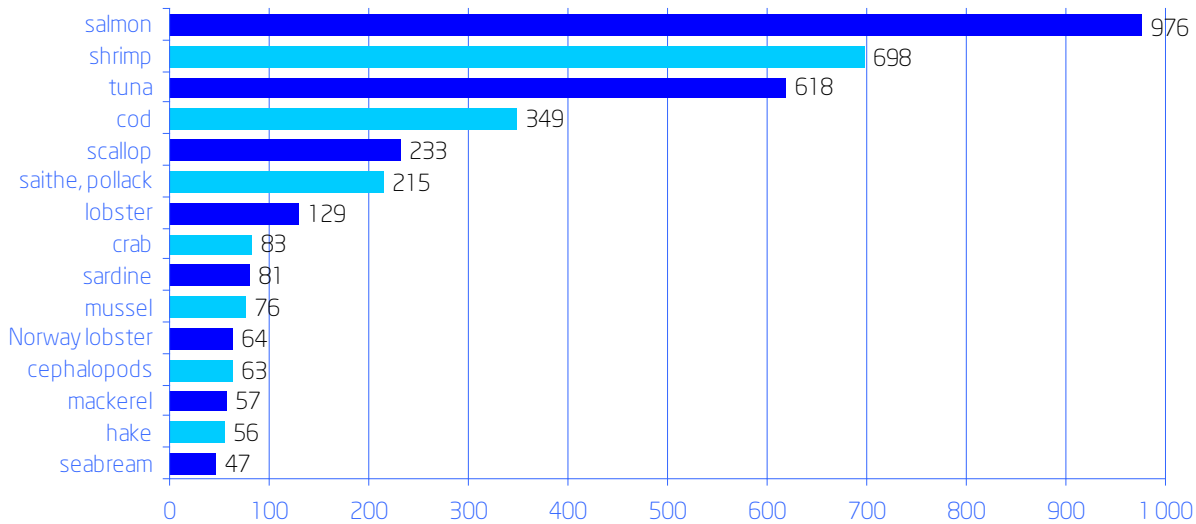


Source : French customs

Imports and exports / metropolitan France and overseas territories

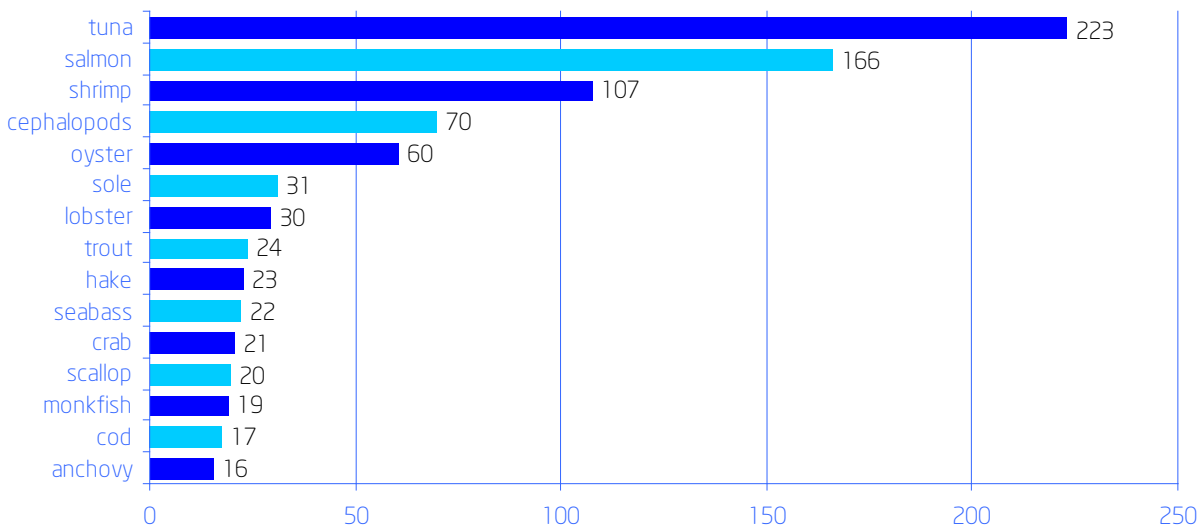
Imports - main species in 2013

Value (million euros)



Exports - main species in 2013

Value (million euros)

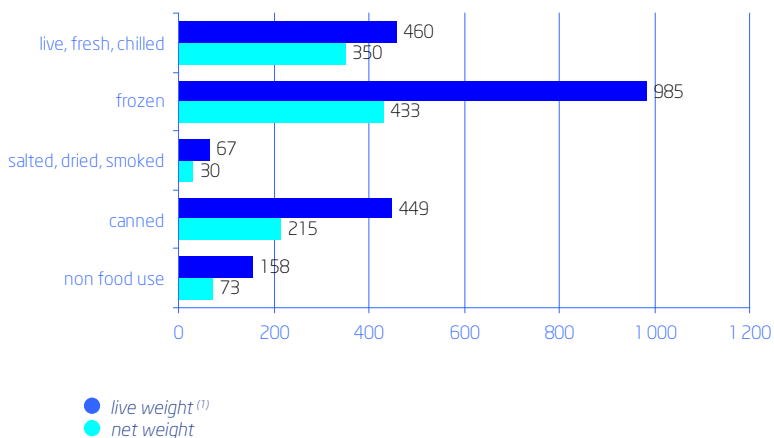


Source : French customs

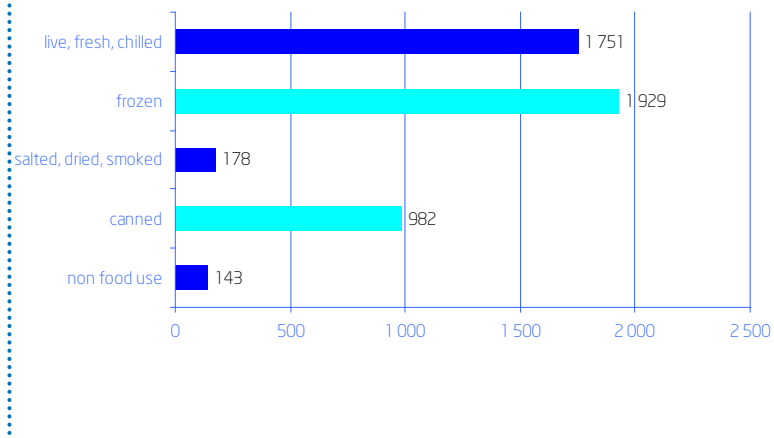


Imports by presentation in 2013

Imports by volume (1 000 tons)

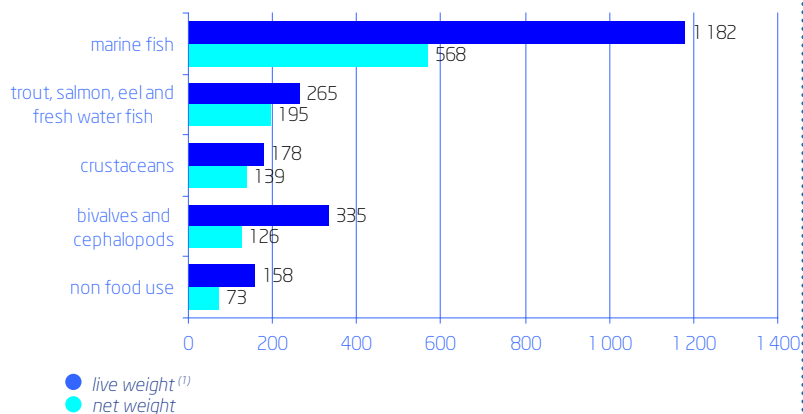


Imports by value (million euros)

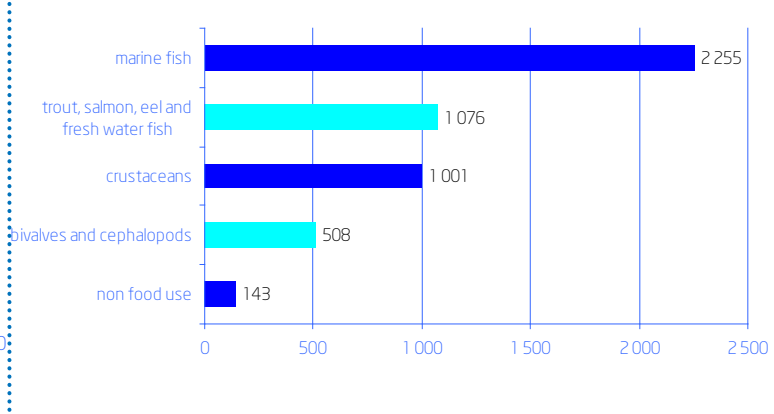


Imports by species group in 2013

Imports by volume (1 000 tons)



Imports by value (million euros)

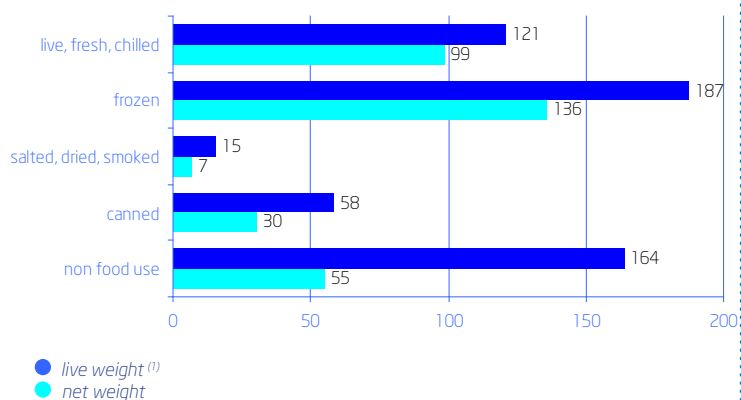


(1) data collection methodology is detailed on inside back cover - Source : French customs

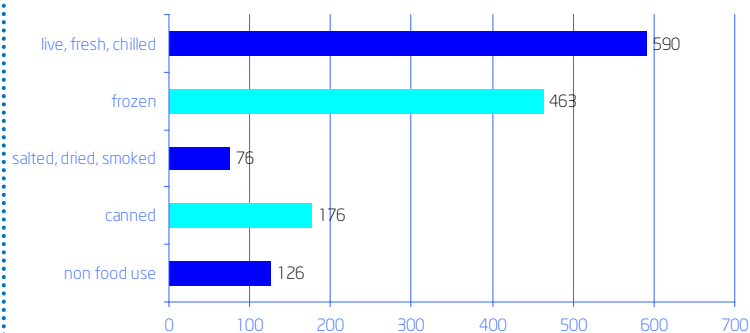
Imports and exports / metropolitan France and overseas territories

Exports by presentation in 2013

Exports by volume (1 000 tons)

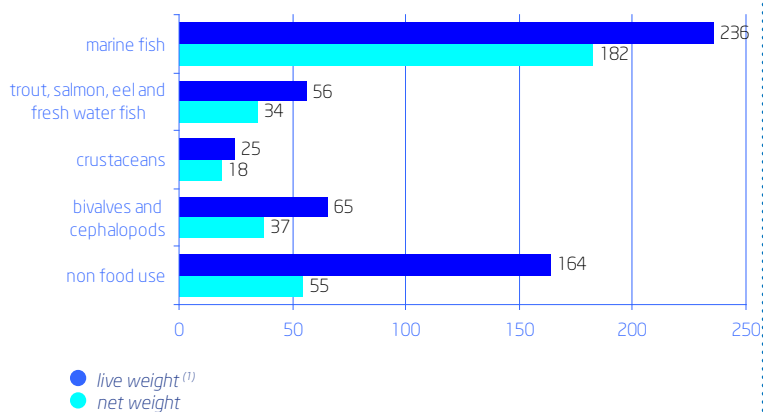


Exports by value (million euros)

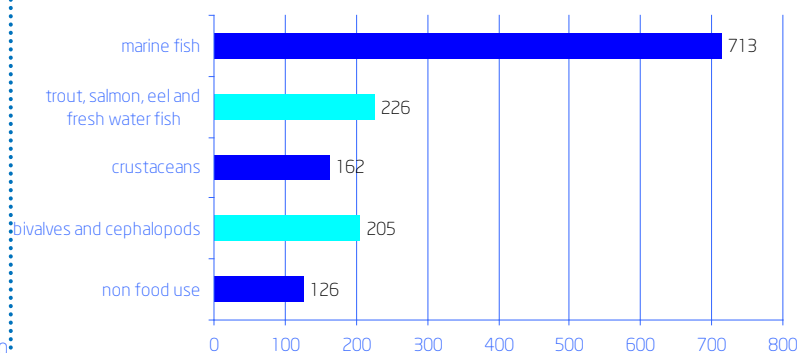


Exports by species group in 2013

Exports by volume (1 000 tons)



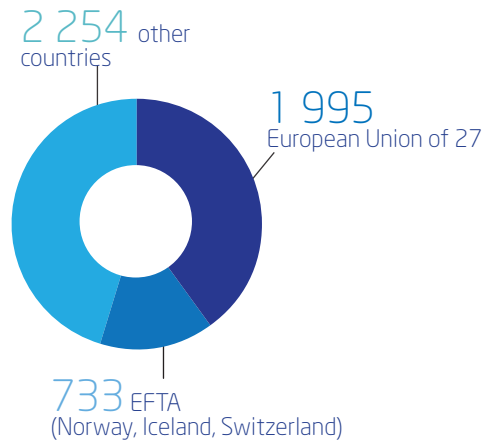
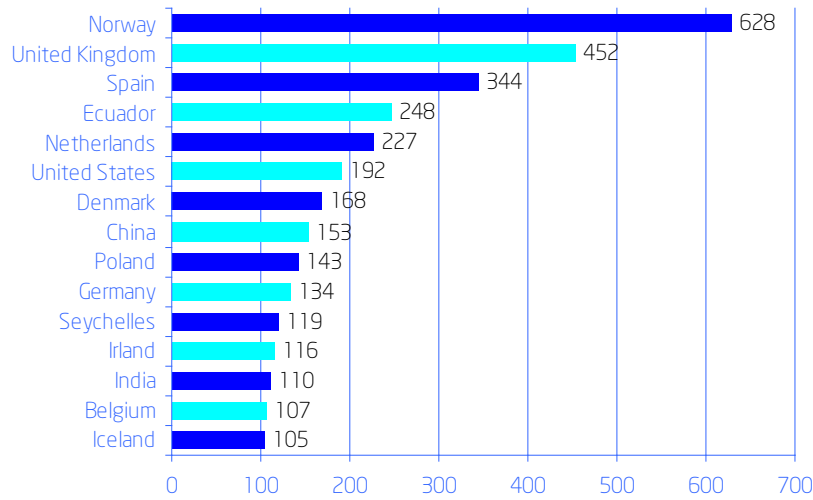
Exports by value (million euros)



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

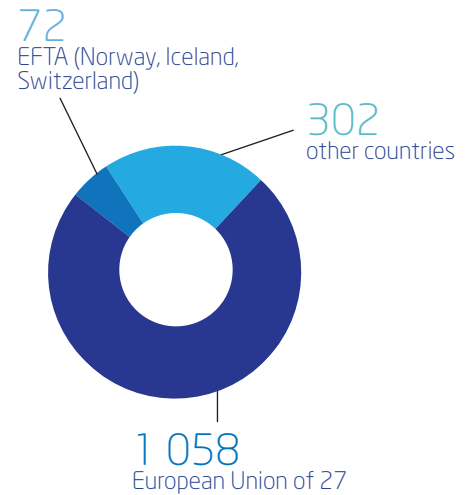
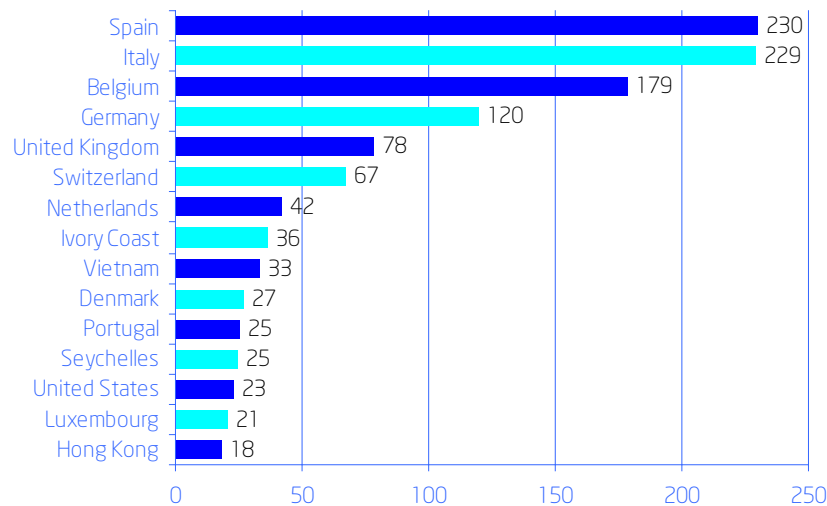
Imports of aquatic products by geographical origin in 2013

Value (million euros)



Exports of aquatic products by destination in 2013

Value (million euros)



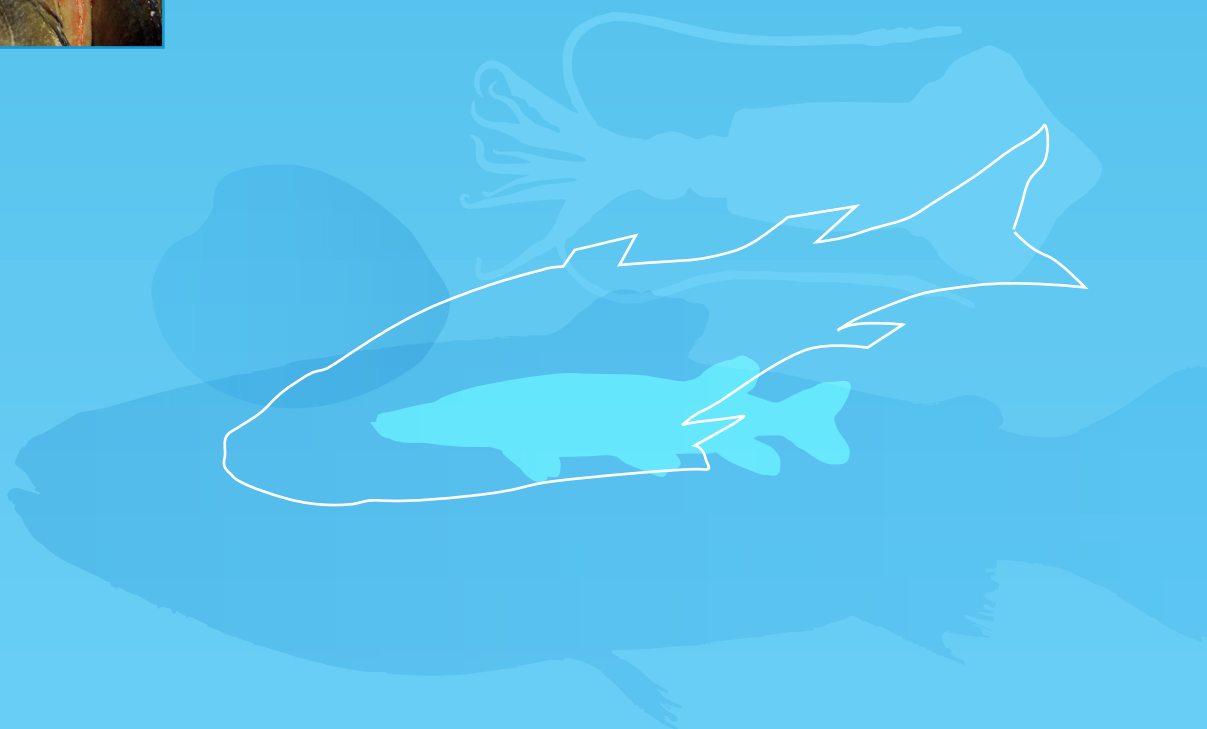
Source : French Customs

Consumption

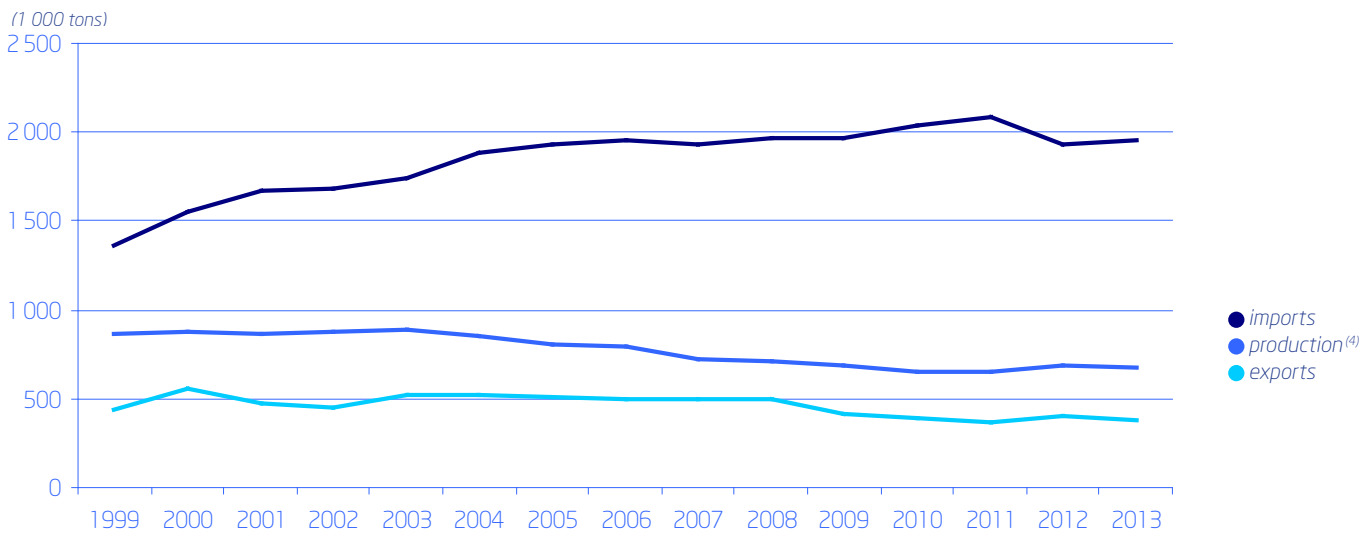


supply balance / purchases

households / catering / breakdown of purchases by distribution channel

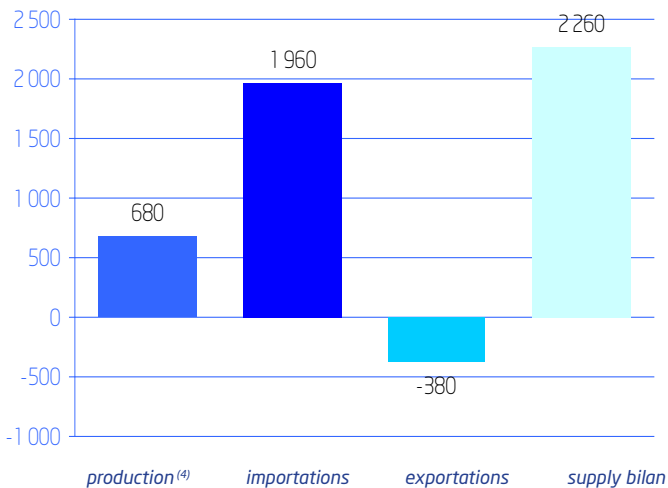


Balance changes in production, imports and exports ⁽¹⁾⁽²⁾⁽³⁾

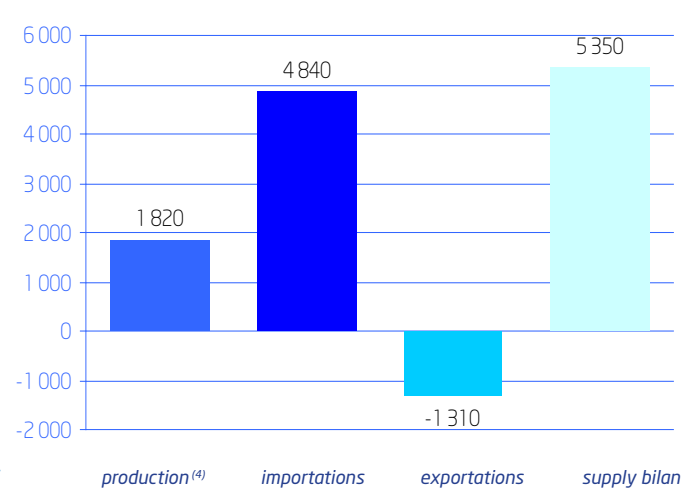


Supply balance in 2013 ⁽¹⁾⁽²⁾⁽³⁾

in volume (1 000 tons)



in value (million euros)

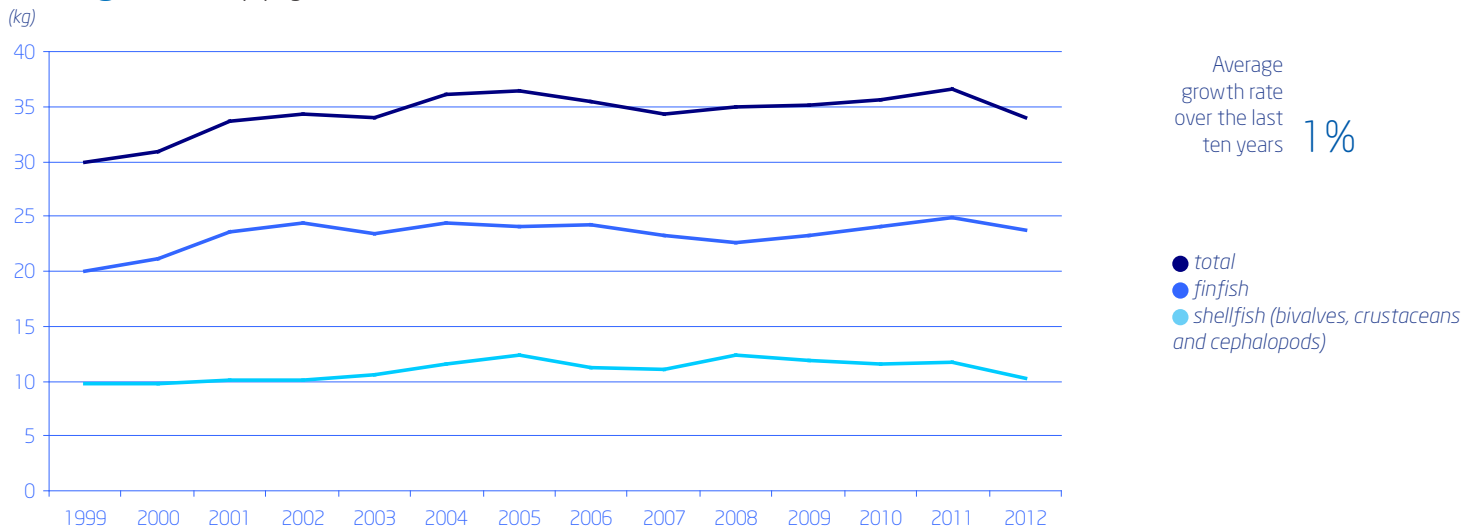


(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) excluding non food use - (4) estimates for 2013 -
Source : FranceAgriMer

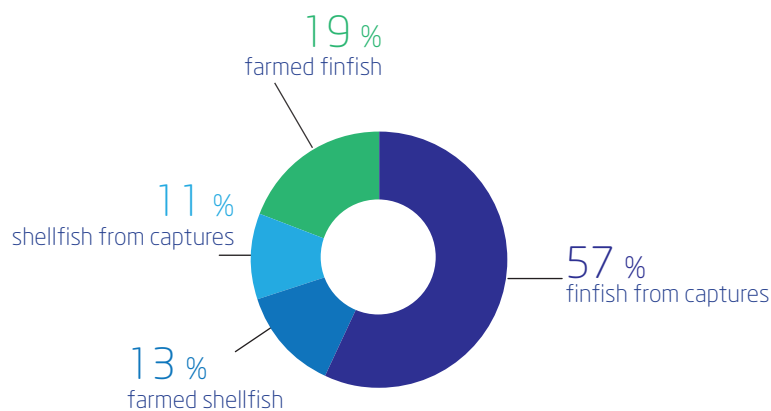
Supply balance



Changes in supply balance ⁽¹⁾⁽²⁾



Breakdown by products in 2012 ⁽¹⁾⁽²⁾



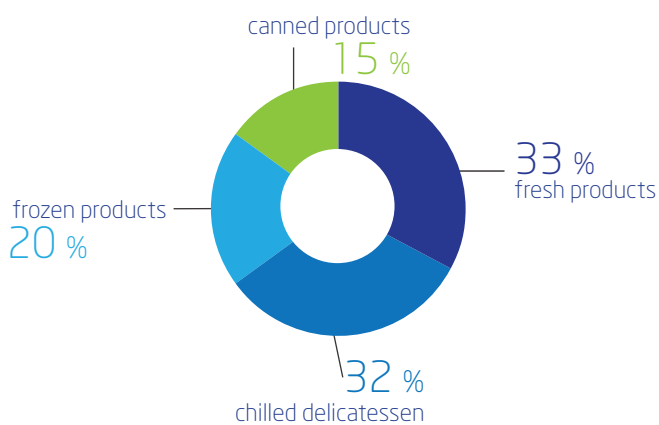
Average annual consumption per capita ⁽²⁾⁽³⁾



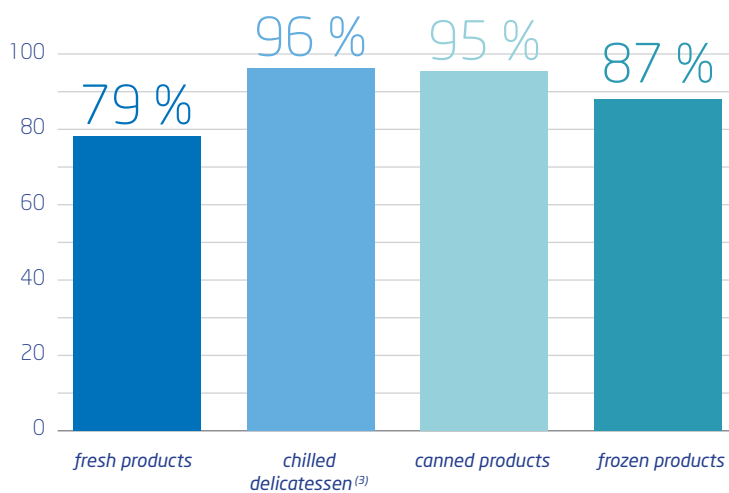
(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) average 2010-2012 - Source : FranceAgriMer



Households spending in 2013 ⁽¹⁾



Percentage of purchasing households in 2013 ⁽²⁾

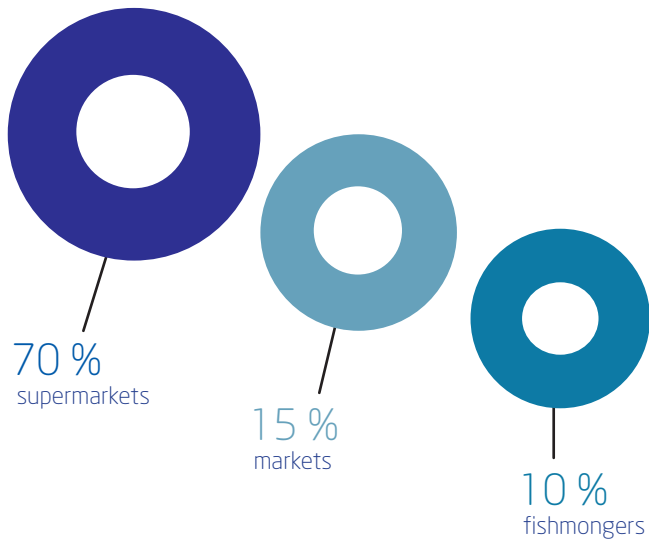


(1) data collection methodology is detailed on inside back cover - (2) a purchasing households buys the product at least once a year - (3) with bar code - Source : FranceAgriMer following Kantar Worldpanel

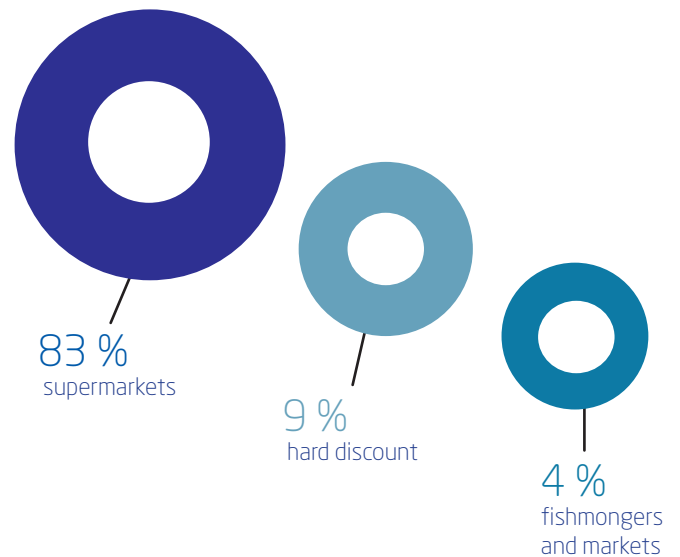
Purchases by French households for home consumption

Purchases of aquatic products by french households for home consumption in 2013⁽¹⁾

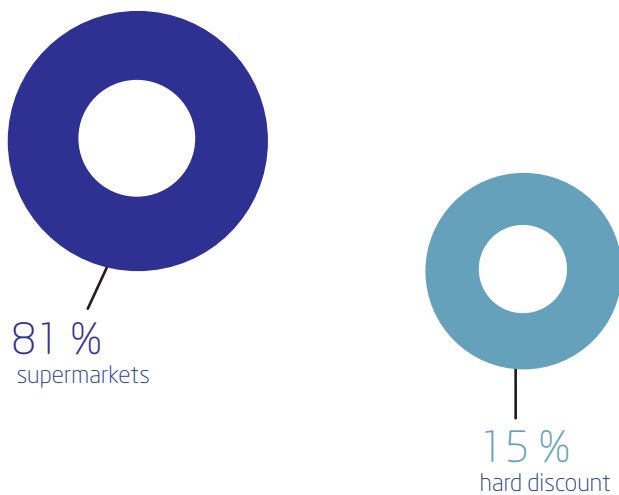
Fresh products



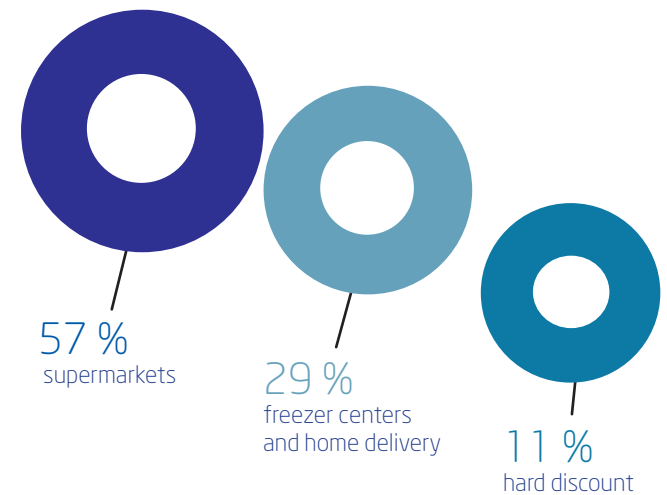
Chilled delicatessen



Canned products



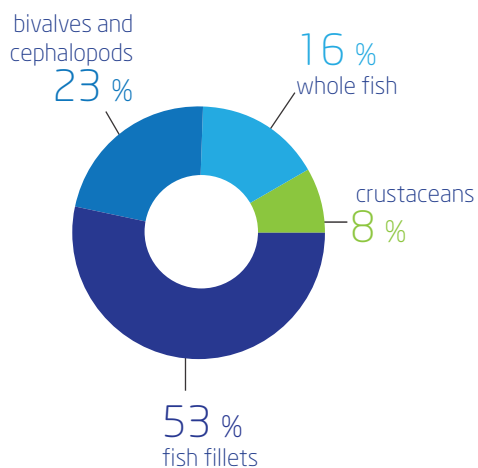
Frozen products



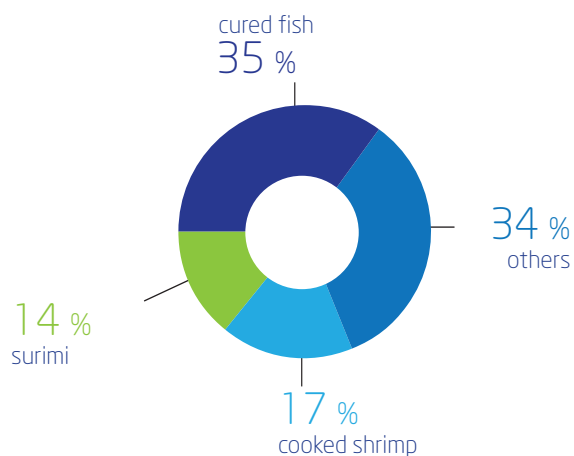
⁽¹⁾ data collection methodology is detailed on inside back cover -
Source : FranceAgriMer following Kantar Worldpanel

Breakdown of expenditures by presentation and species group in 2013 ⁽¹⁾

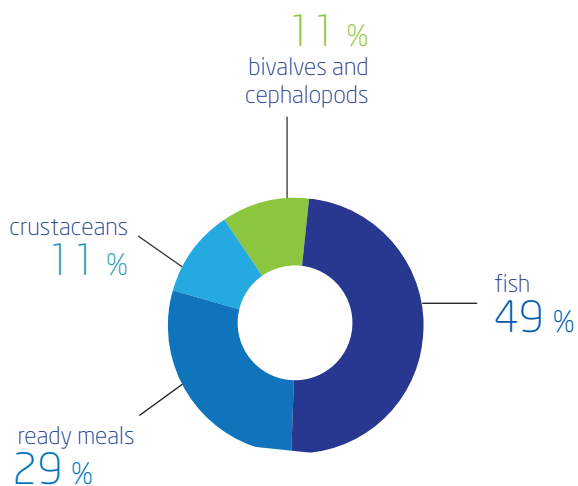
Fresh products



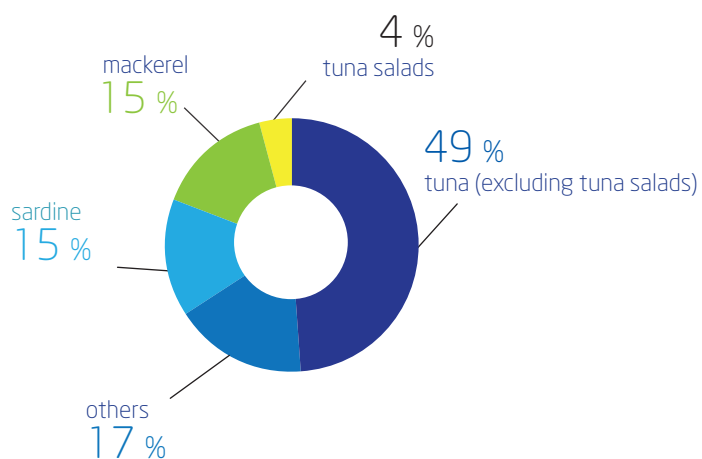
Chilled delicatessen



Frozen products



Canned products

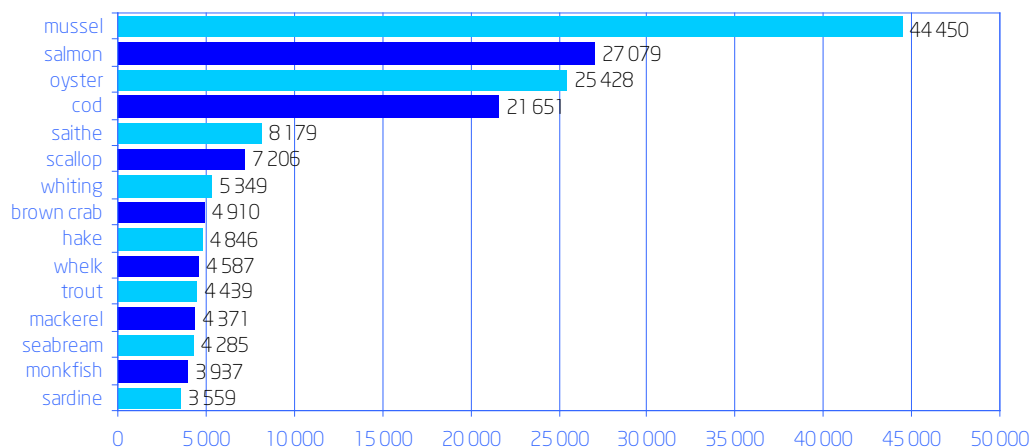


(1) data collection methodology is detailed on inside back cover -
Source : FranceAgriMer following Kantar Worldpanel

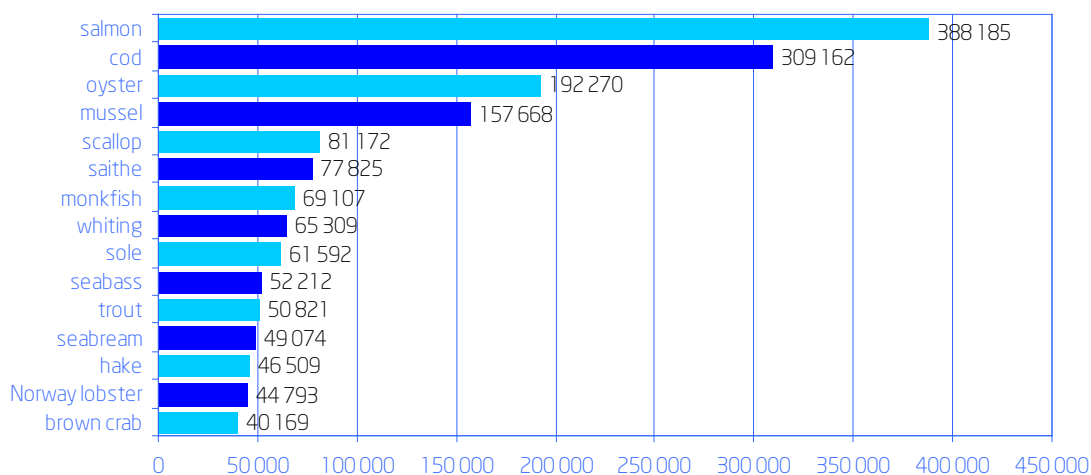
Purchases by French households for home consumption

Main species purchased fresh in 2013 ⁽¹⁾

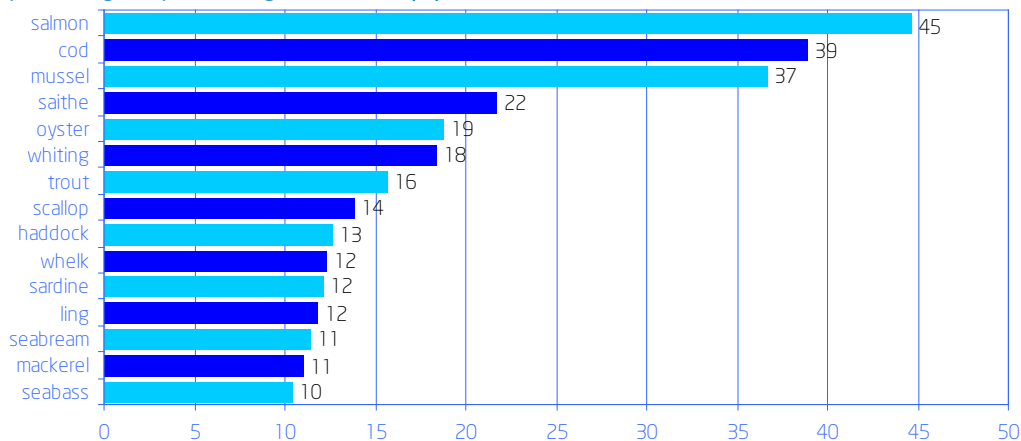
tons ⁽²⁾



million euros



percentage of purchasing households (%)

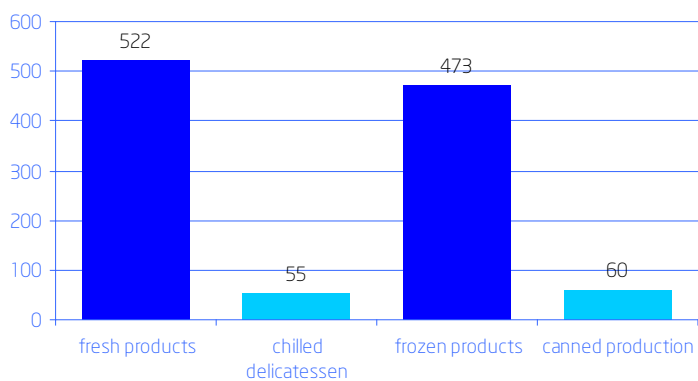


(1) data collection methodology is detailed on inside back cover - (2) net weight
Source : FranceAgriMer following Kantar Worldpanel

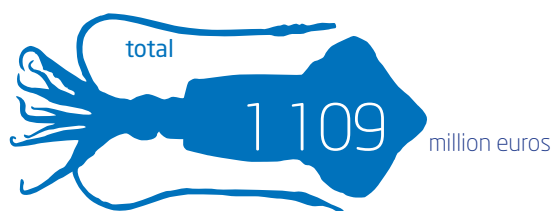
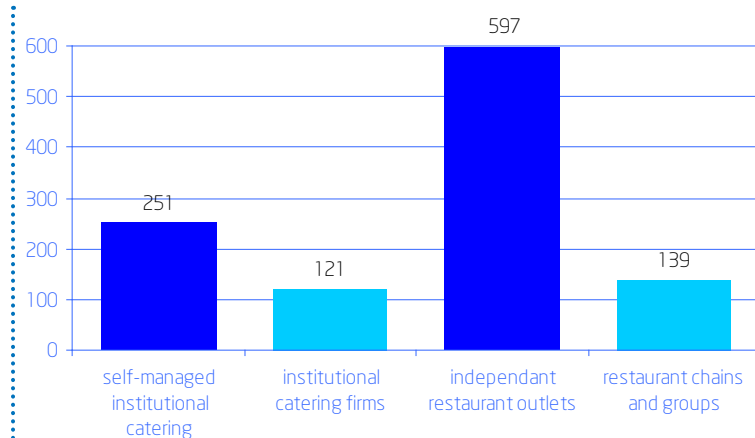


Spending in 2012

by presentation (million euros)



by catering outlet type (million euros)

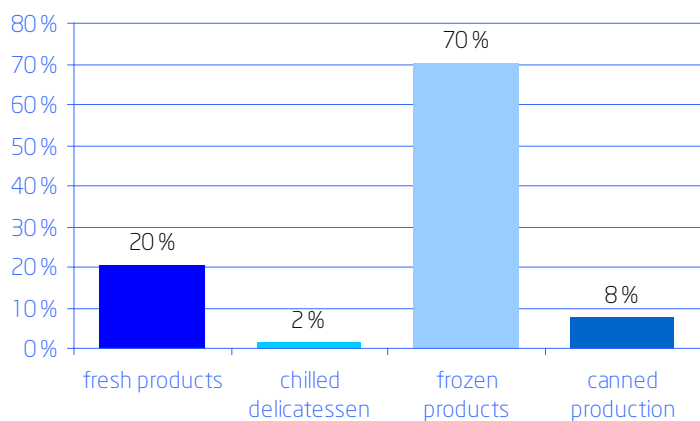


Source : FranceAgriMer following Crédoc

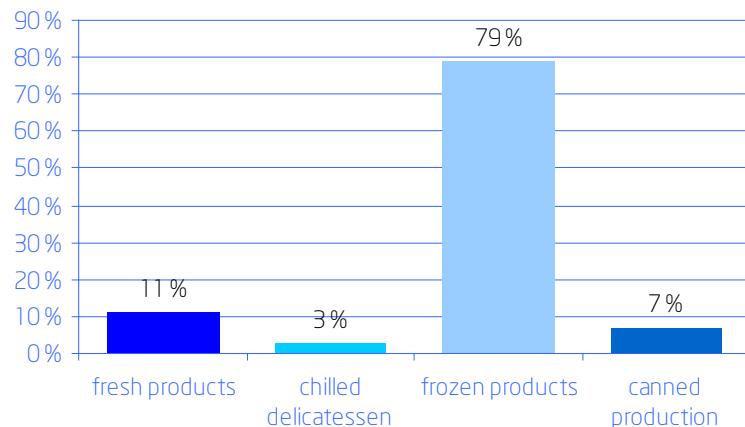
Purchases of aquatic products by the catering sector

Spending by catering outlet and by presentation in 2012

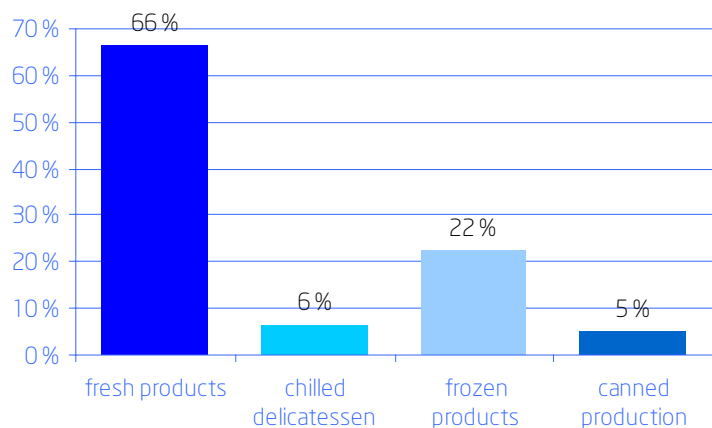
Self-managed institutional catering



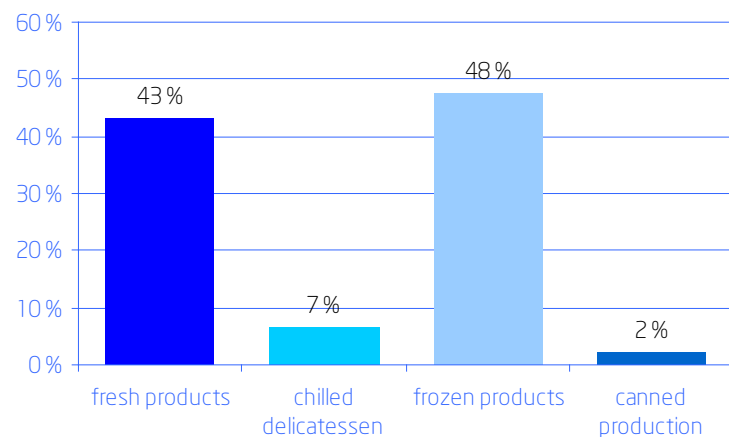
Institutional catering firms



Independant restaurant outlets



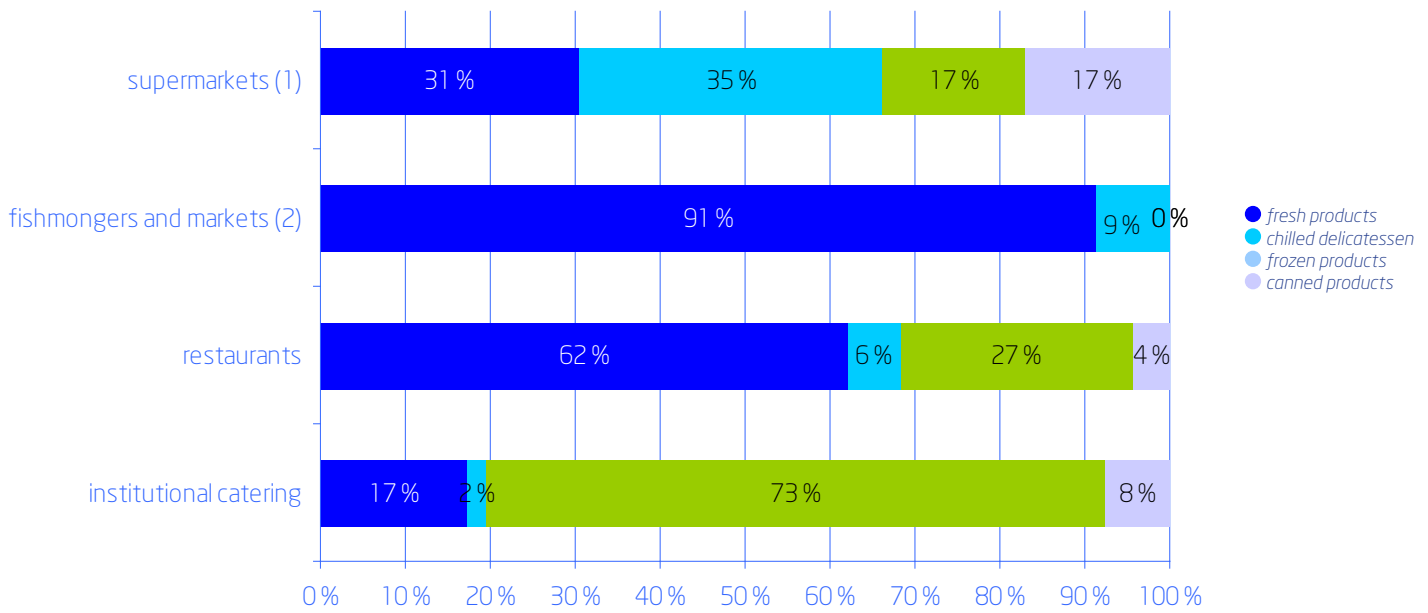
Restaurant chains and groups



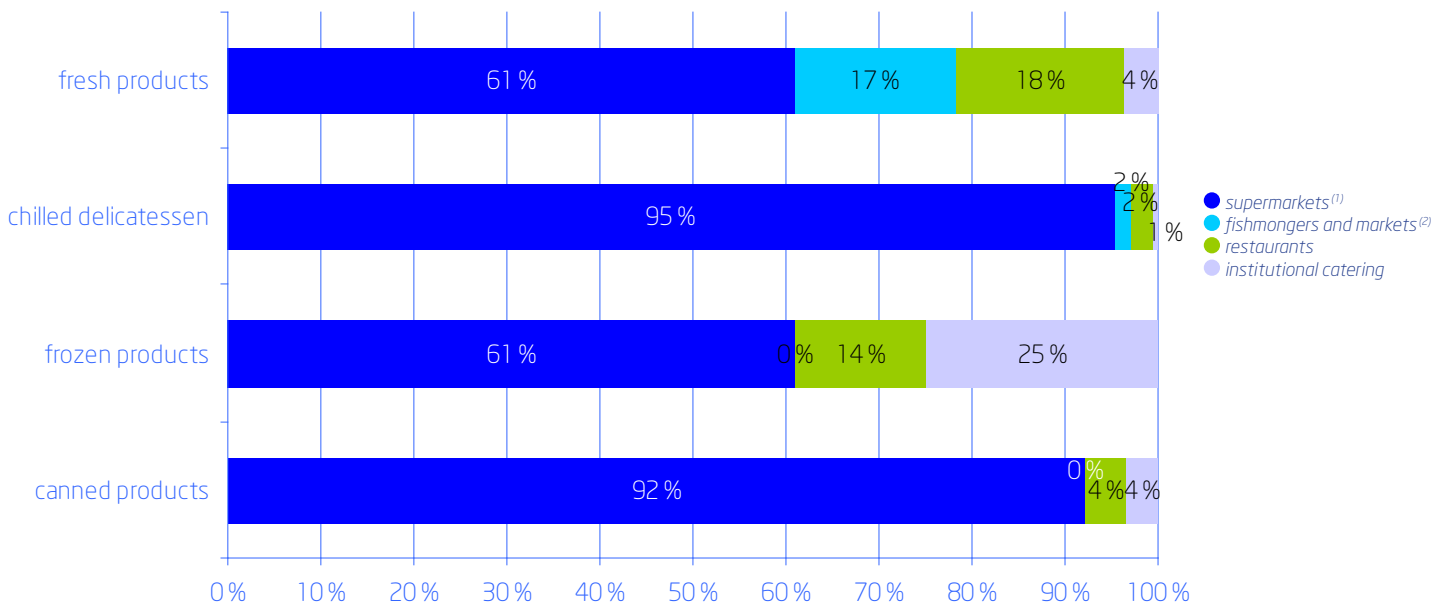
Source : FranceAgriMer following Crédoc

Breakdown of purchases by distribution channel

Breakdown of purchases by presentation for different outlets (value)



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



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

Source : Kantar Worldpanel and Crédoc for FranceAgriMer

Data collection methodology

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Data Included data are the last available in april 2014.
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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.
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Processing Processing firms data arise from a survey carried out in 2013 among main or secondary processing activity identified firms. Besides, information about non-processing trading firms arises from FranceAgriMer's updated fish trading firms database (notably following the French National Institute for Statistics and Economic Studies' firm lists, sanitary approvals, financial databases and professional sources).
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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%.
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To find out more information, especially about prices at all levels of the sector (production, trade, consumption), and their trends :

- Bilan annuel FranceAgriMer 2013 des ventes déclarées en halles à marée*
- Bilan annuel FranceAgriMer 2013 du commerce extérieur des produits de la pêche et de l'aquaculture*
- Bilan annuel FranceAgriMer 2013 de la consommation des produits de la pêche et de l'aquaculture*

* coming 2014
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Ric Réseau inter criées

MEDDE Ministère de l'Écologie, du Développement durable et de l'Énergie

DPMA Direction des Pêches Maritimes et de l'Aquaculture

BSPA Bureau des statistiques de la Pêche et de l'Aquaculture

DAM Direction des Affaires Maritimes

SDSIM Sous Direction des Systèmes d'information maritimes

Ifremer Institut français de recherche pour l'exploitation de la mer

