

The fisheries and aquaculture sector in France

> EDITION april 2016



Production
Firms
Trade
Consumption

Summary

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

Firms

page 15



Fishmonger firms
Trading firms
Processing firms

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

Consumption

page 25



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

Production

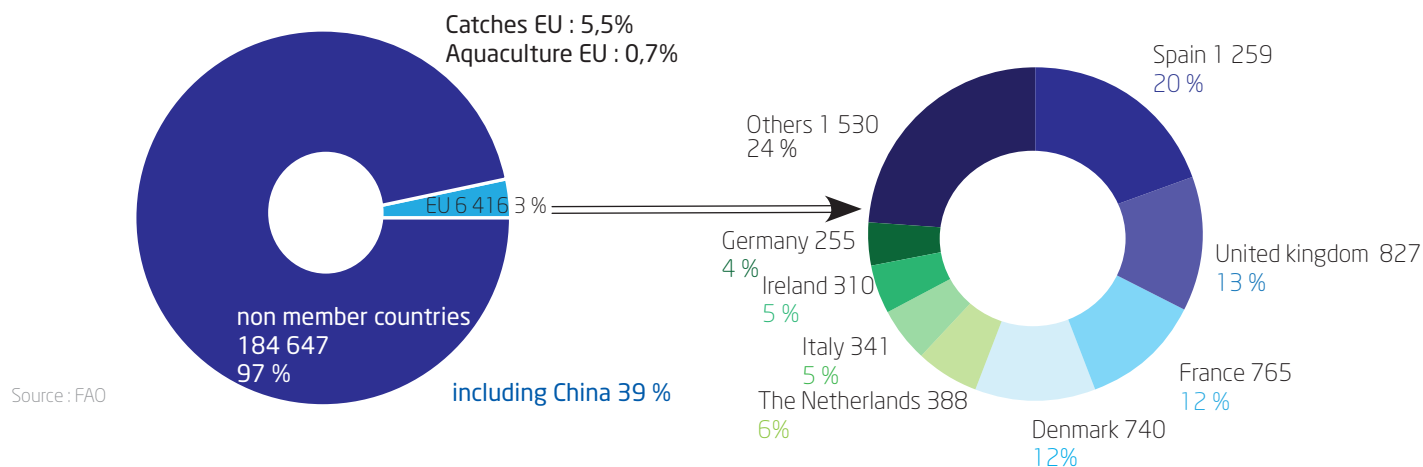


fishing fleet /
aquaculture firms / jobs
total sales of fisheries and aquaculture products



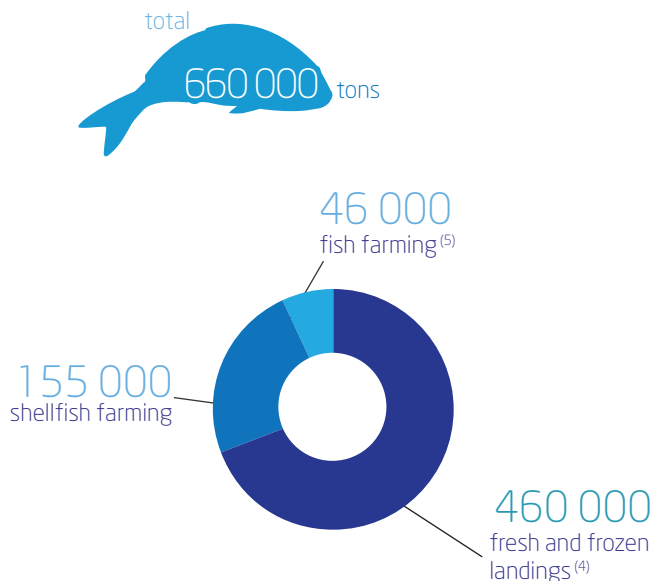
France in the EU-28 and in the world in 2013

in 1000 tons and % of total



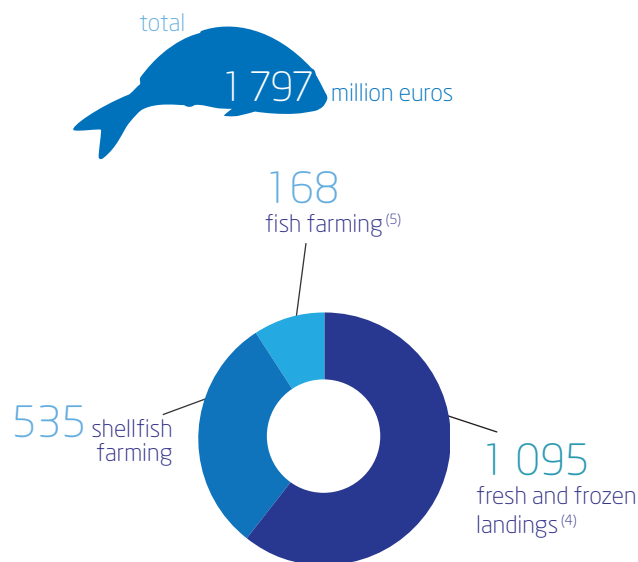
Quantities sold in 2013 ⁽¹⁾⁽²⁾

by method of production (tons) ⁽³⁾



Value of sales in 2013 ⁽¹⁾⁽²⁾

by method of production (million euros)

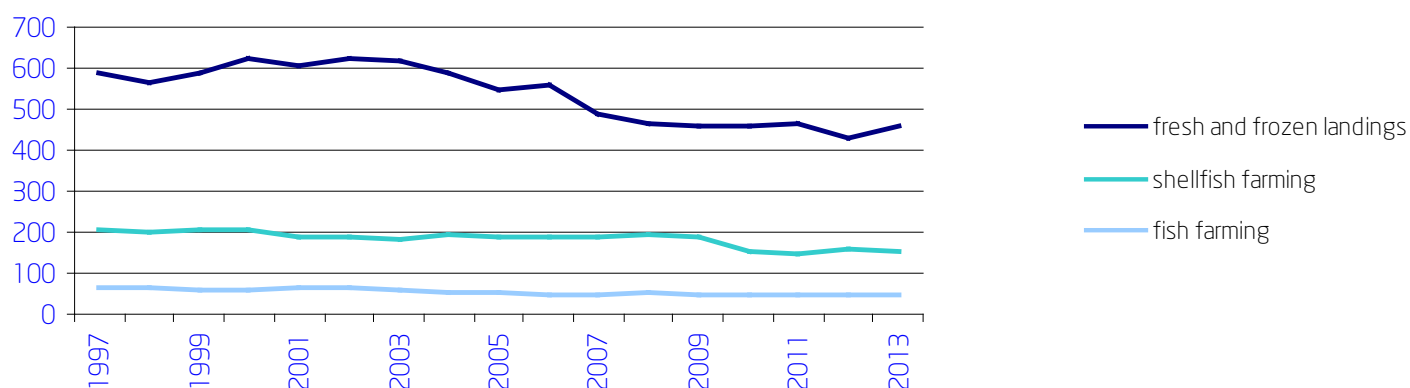


(1) excluding seaweeds - (2) data 2013 for fishing and 2013 for fish farming - (3) equivalent live weight - (4) sales, sales to processing industry and export sales
(5) including farmed crustaceans
Source : MEEM / DPMA / BSPA

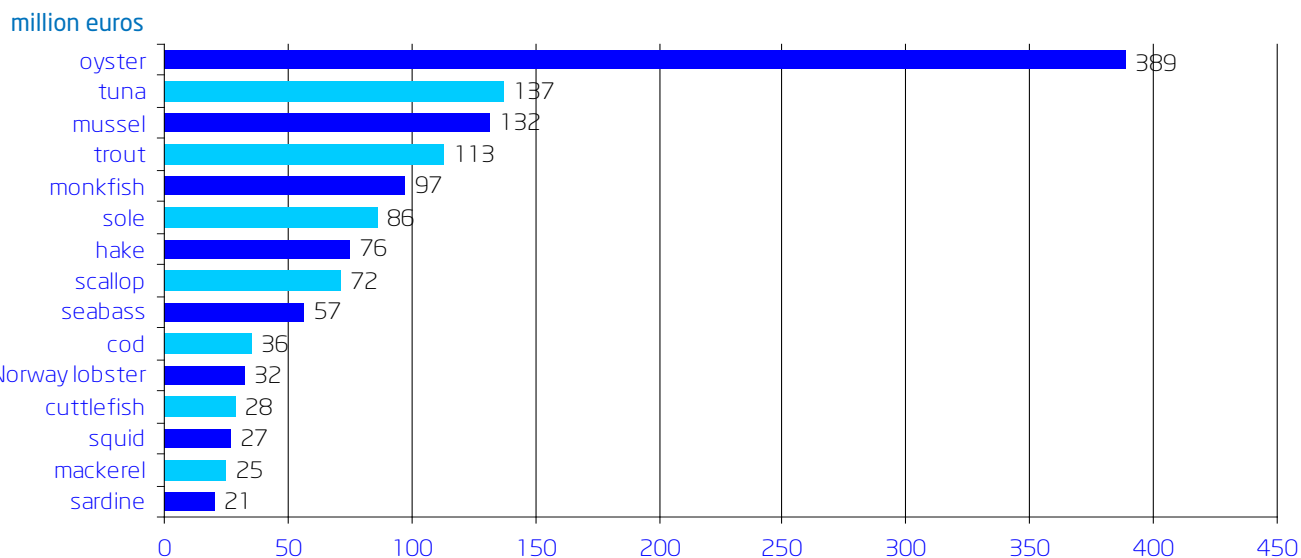
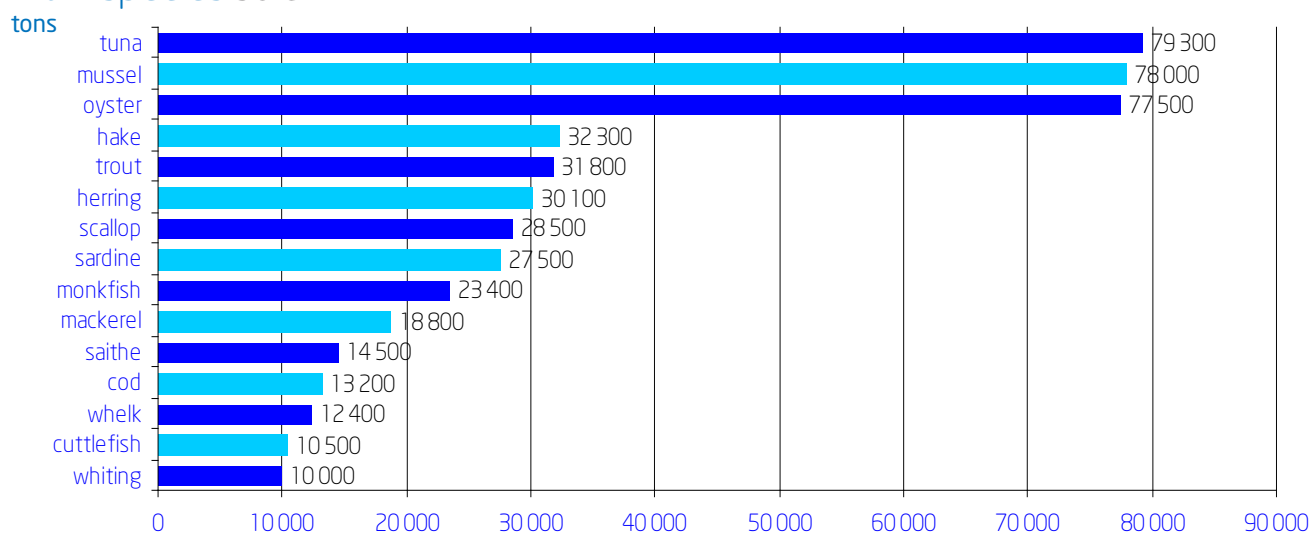
Total sales / metropolitan France and overseas territories

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

(1 000 tons) ⁽³⁾



Main species sold ⁽²⁾⁽³⁾⁽⁴⁾

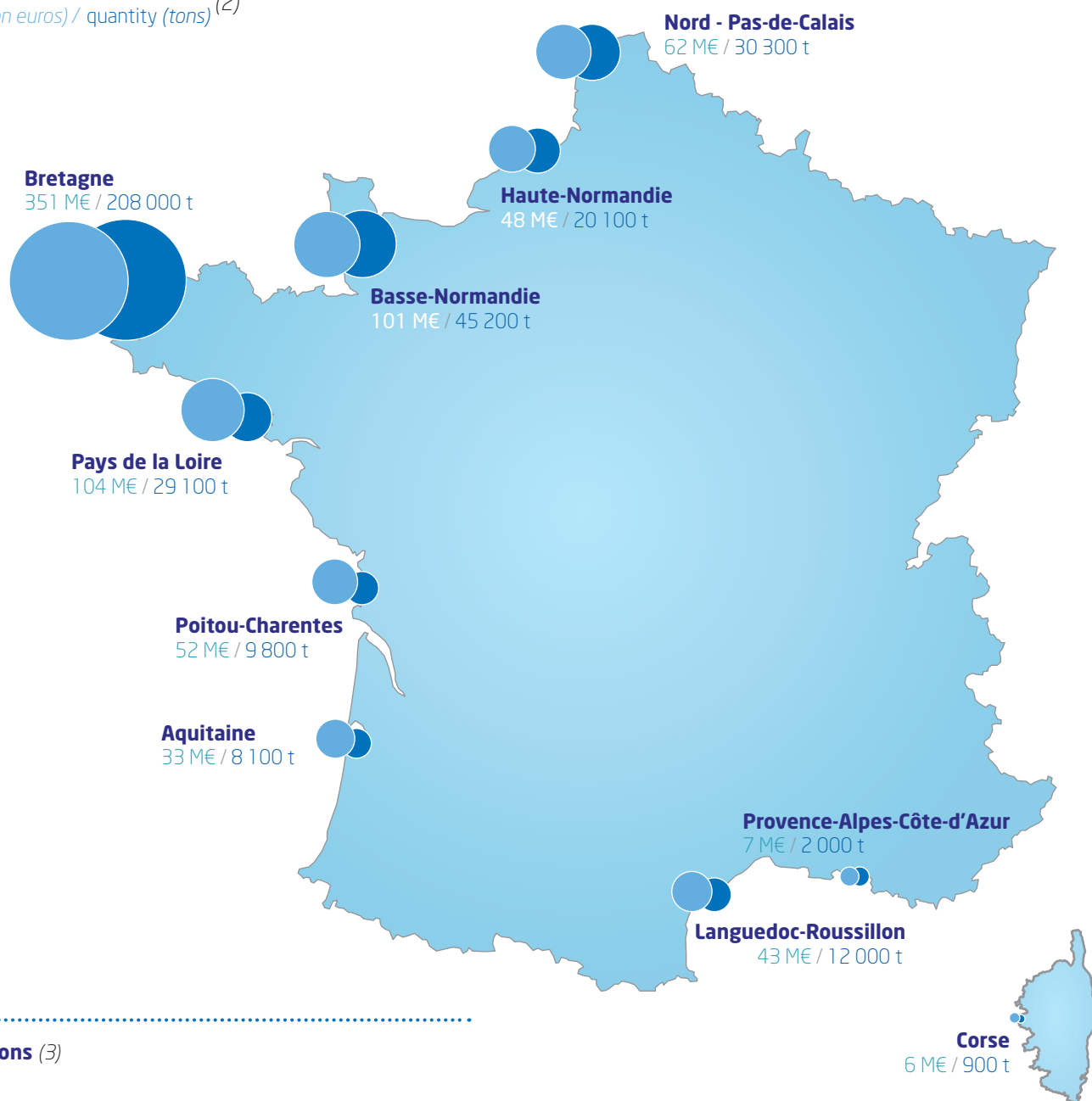


(1) excluding seaweeds - (2) data 2013 for fishing and 2013 for fish farming - (3) equivalent live weight - (4) sales, sales to processing industry and export sales
 (5) including farmed crustaceans -
 Source : MEEM / DPMA / BSPA

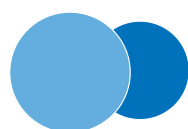
Fresh and frozen landings in 2013⁽¹⁾

Sales

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



Other regions⁽³⁾



288 M€ / 94 900 t

(1) excluding seaweeds and freshwater fishing -

(2) equivalent live weight

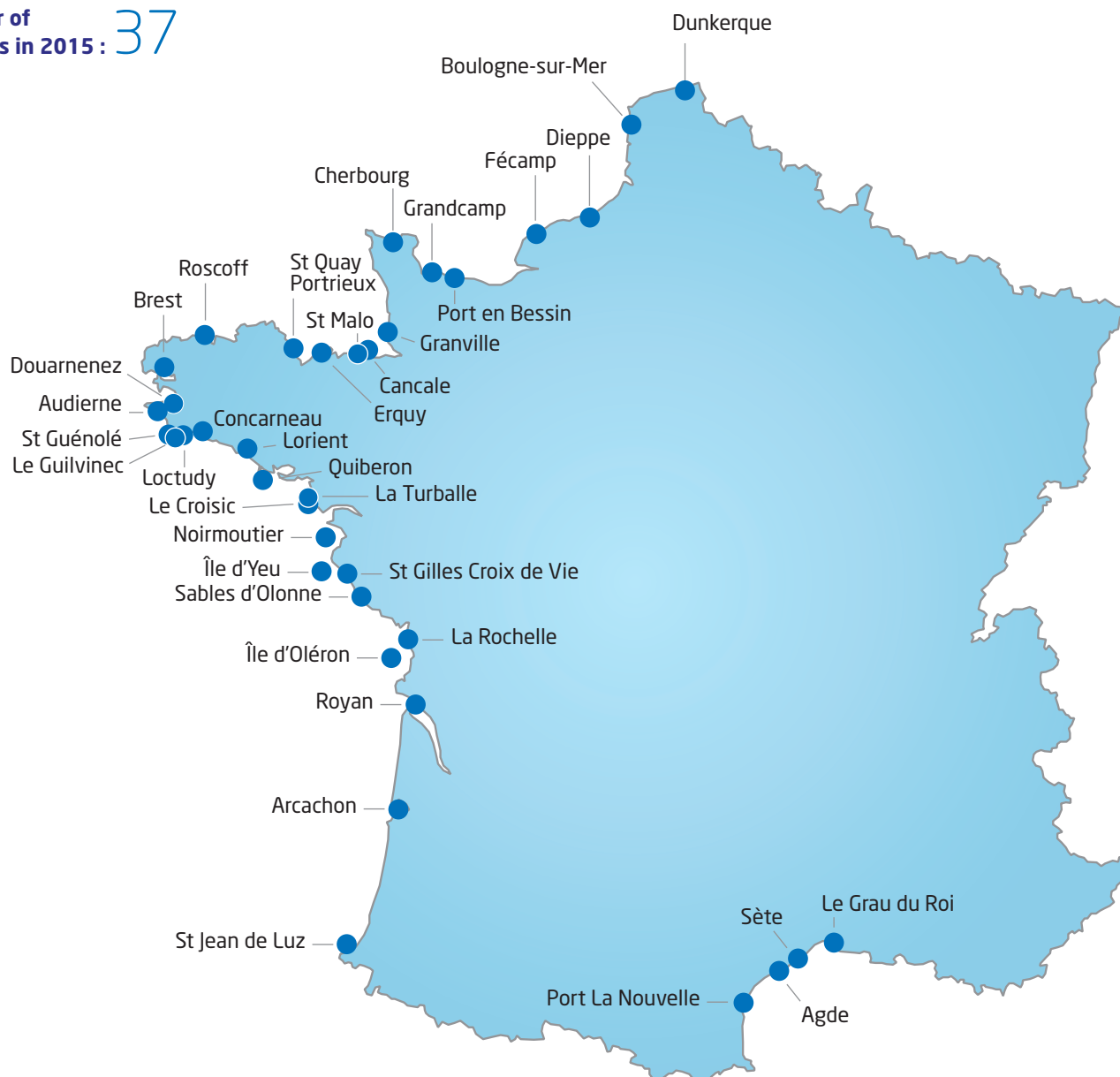
(3) including sales in overseas territories and foreign sales

Source : MEEM / DPMA / BSPA

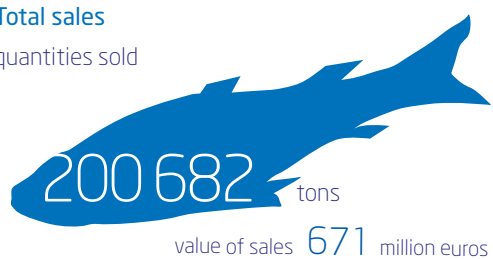
Sales of fishery products

Sales of fishery products at auction in 2015

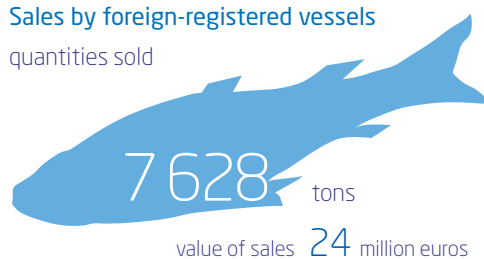
Number of auctions in 2015 : 37



Total sales
quantities sold



Sales by foreign-registered vessels
quantities sold

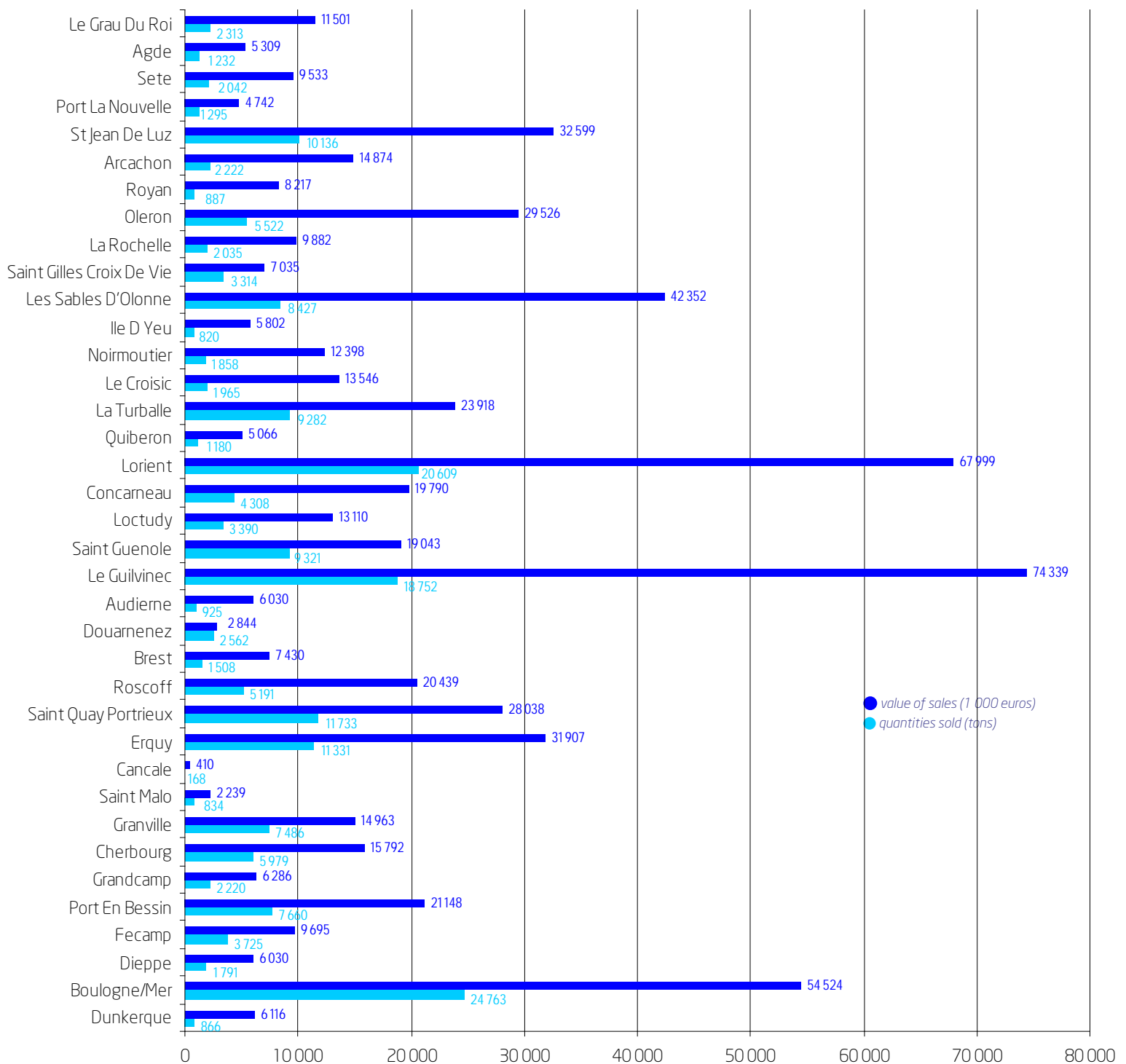


Source : Ric / FranceAgriMer

Production / sales at auction



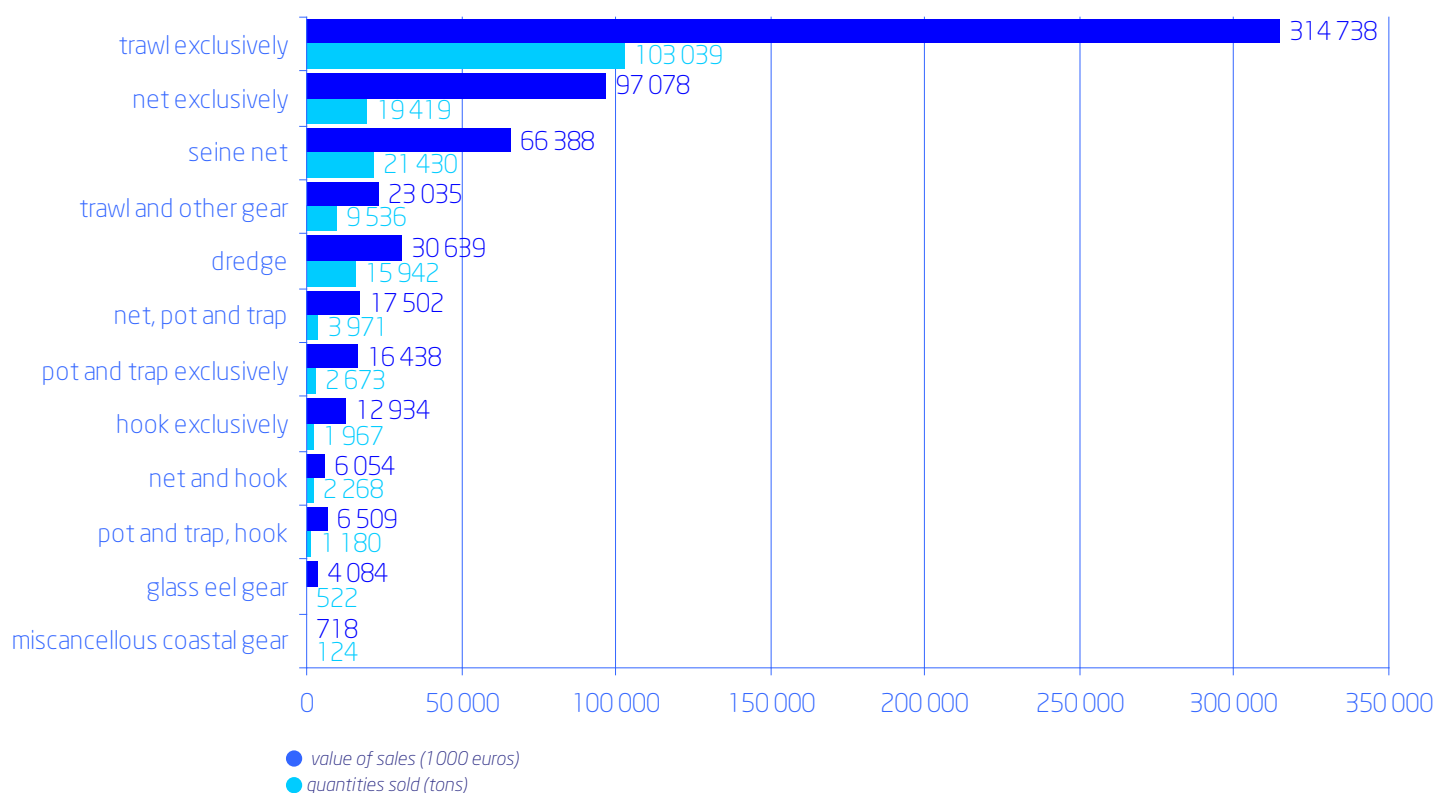
Quantities sold and value of sales at the main auctions in 2015



Source: Ric / FranceAgriMer

Sales of fishery products

Breakdown of quantities sold and value of sales at auction in 2015 by fleet segment ⁽¹⁾⁽²⁾⁽³⁾



Number of vessels (sales at auction in 2015) ⁽¹⁾⁽²⁾⁽³⁾

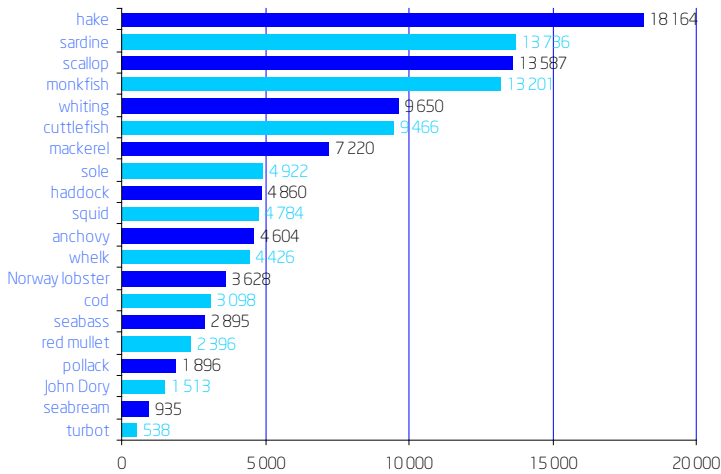
trawl exclusively	436
net exclusively	319
trawl and other gear	370
seine net	251
dredge	47
net, pot and trap	223
net and hook	155
hook exclusively	118
pot and trap exclusively	86
pot and trap, hook	90
glass eel gear	102
miscellaneous coastal gear	38
total	2 235

(1) breakdown by fleet segment based on main gear used by vessels according to the 2014 Ifremer SIH survey - (2) excluding Mediterranean sea - (3) unspecified and inactive are not considered

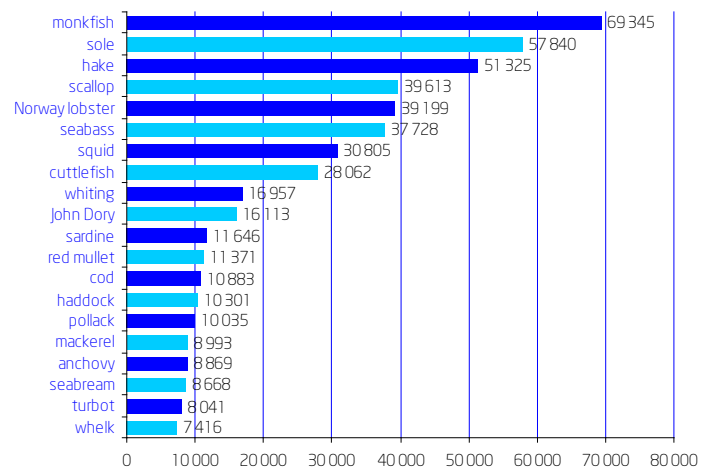
Sources : FranceAgriMer, Ifremer

Main species sold at auction in 2015

Quantities sold (tons)

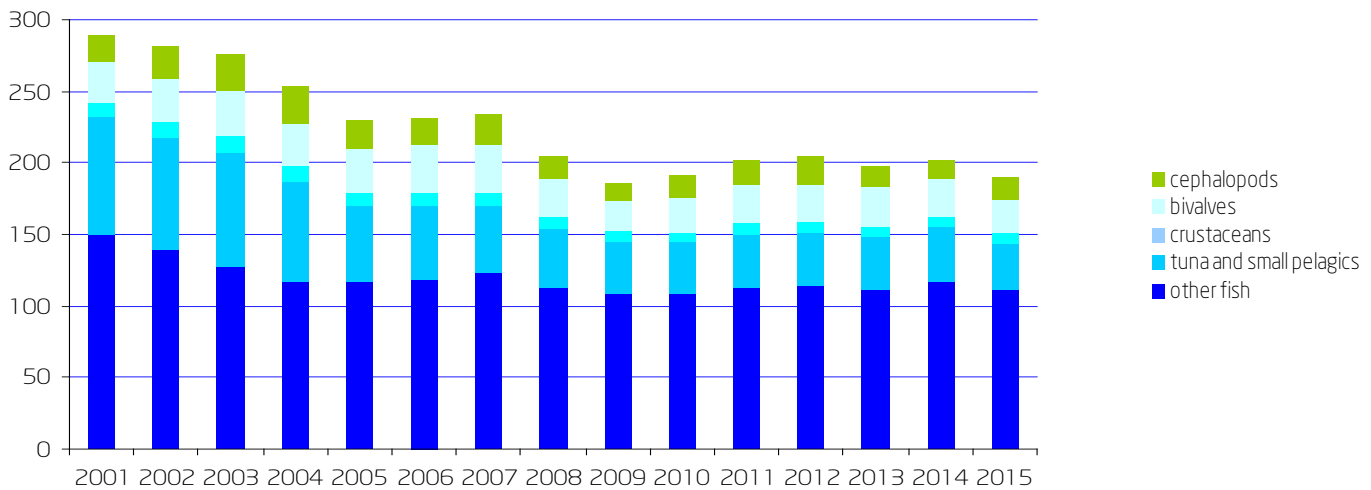


Value of sales (1 000 euros)



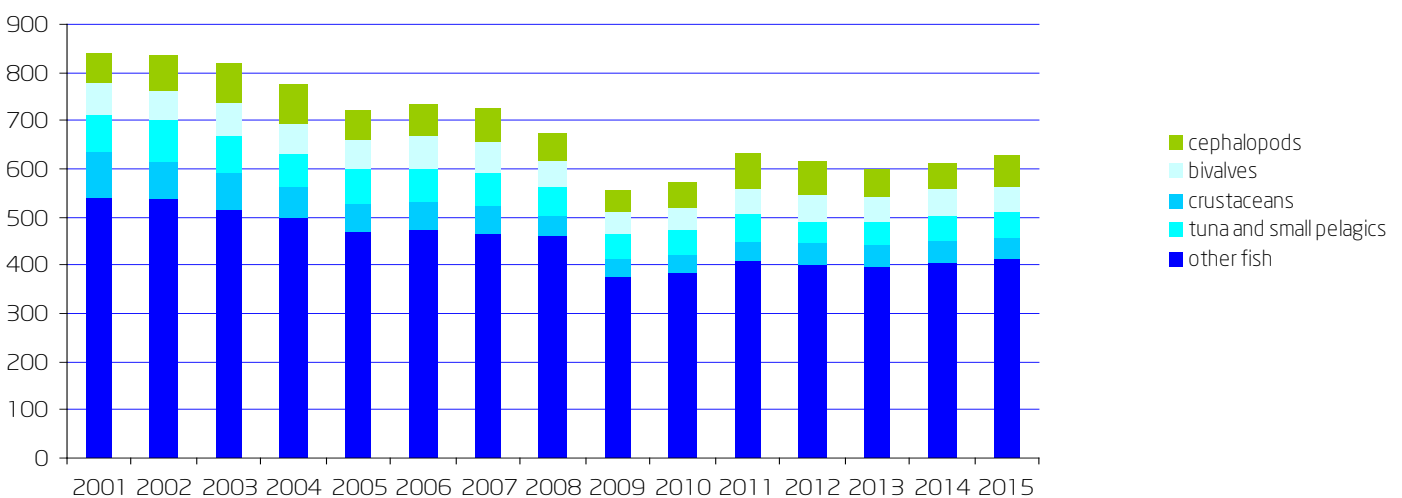
Changes in quantities sold by species group

(1 000 tons)



Changes in value of sales by species group

(million euros)

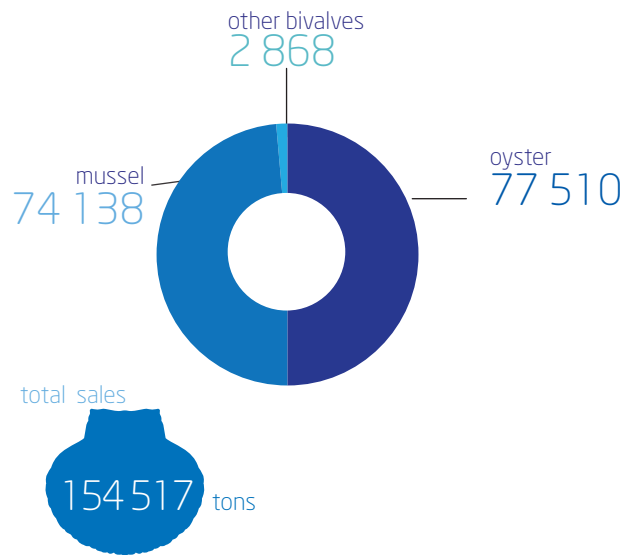


Source : Ric / FranceAgriMer

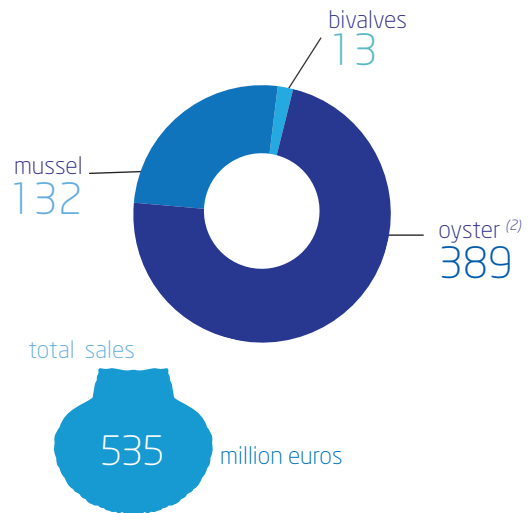
Sales of aquaculture products in metropolitan France

Shellfish farming 2013

Quantities sold for consumption (tons)⁽¹⁾

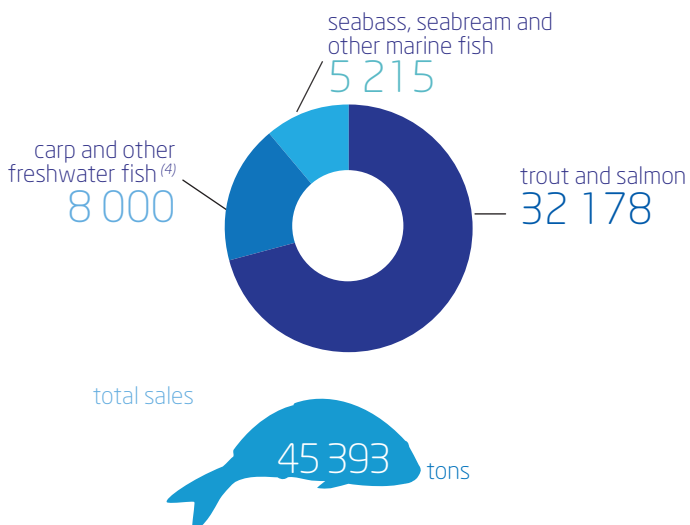


Value of sales (million euros)

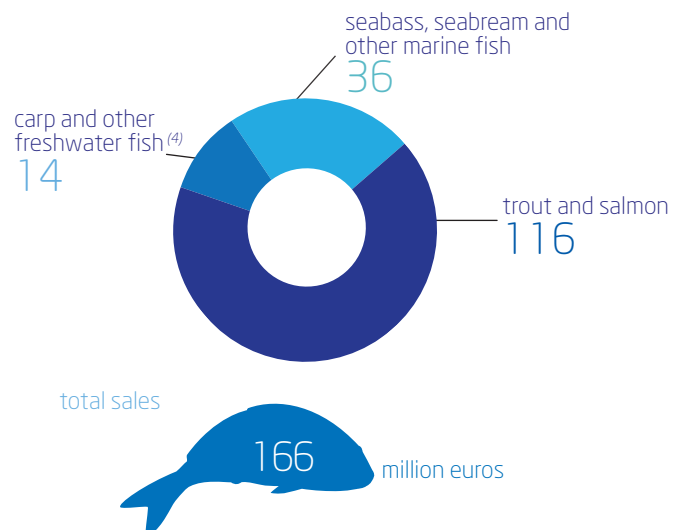


Fish farming 2013

Quantities sold in 2013 (tons)⁽¹⁾⁽³⁾



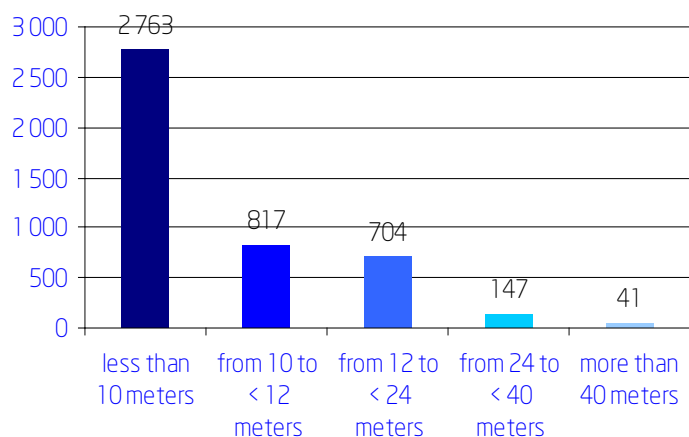
Value of sales in 2013 (million euros)



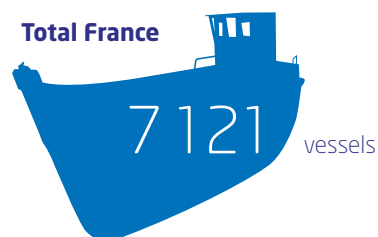
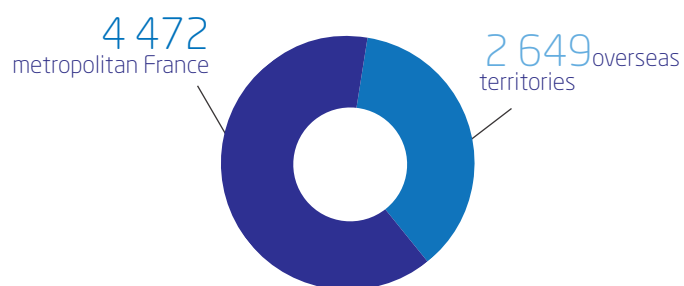
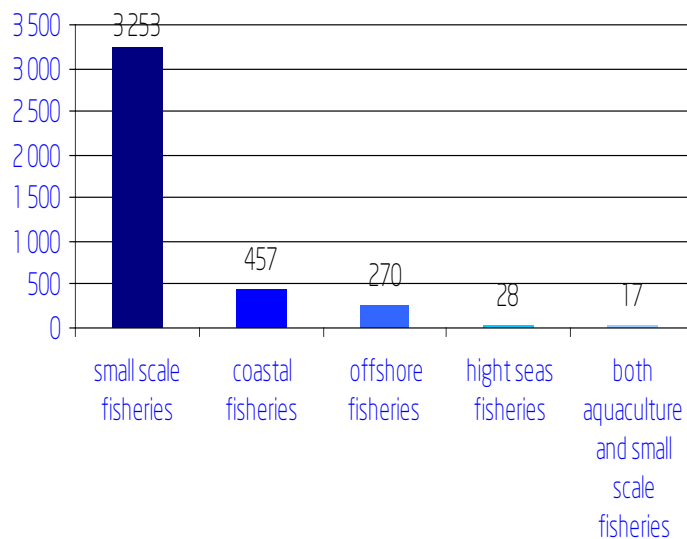
(1) equivalent live weight - (2) excluding grant aids - (3) total sales (consumption, repopulation, recreational fishing, sales to another farmer) (4) including farmed crustaceans
Source : MEEM / DPMA / BSPA (aquaculture survey 2013)

Fishing fleet in 2014

Breakdown of total vessels by length (metropolitan France)



Breakdown of total vessels by fishery category (metropolitan France)



Small scale fisheries out of port ≤ 24 hours

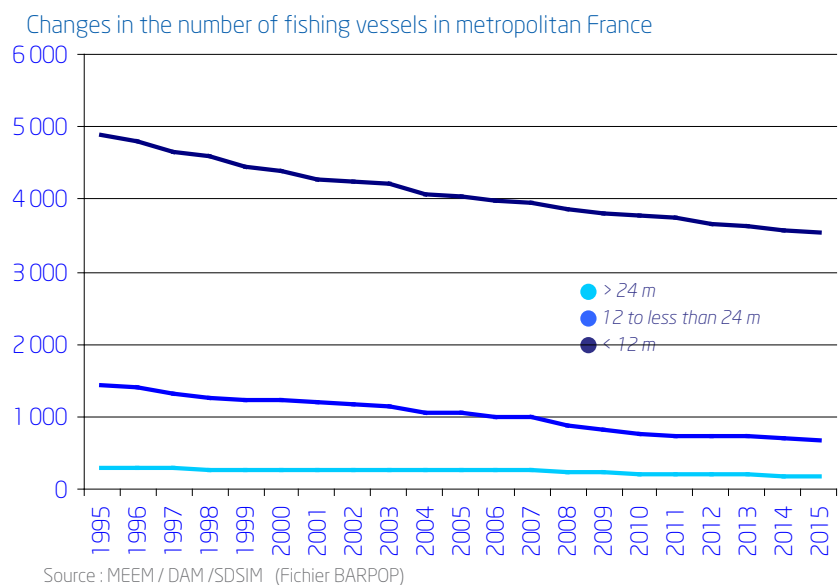
Coastal fisheries 24 hours < out of port ≤ 96 hours

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 : MEEM / DAM / SDSIM (Fichier BARPOP)

Fishing fleet / Aquaculture firms



	< 12 m	12 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	3 535	681	180

Aquaculture firms

shellfish farming - including seaweed and shrimps

2 818

marine fish farming and sturgeon

36

continental salmonids farming

374

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

Production



Jobs

Number of seamen employed on board French fishing vessels in 2013 (seamen of all nationalities)

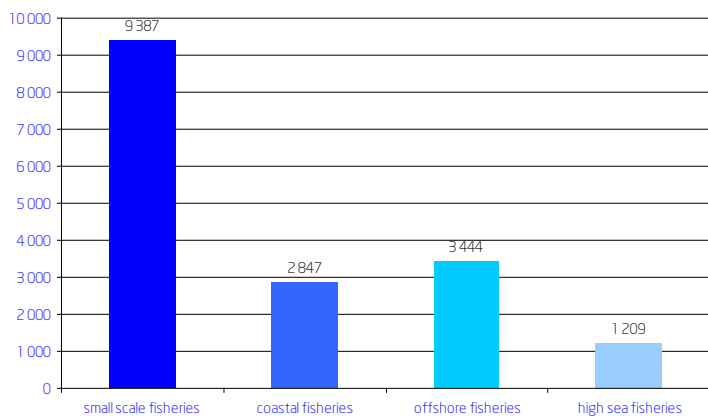
13 609
metropolitan France

overseas territories
3 278

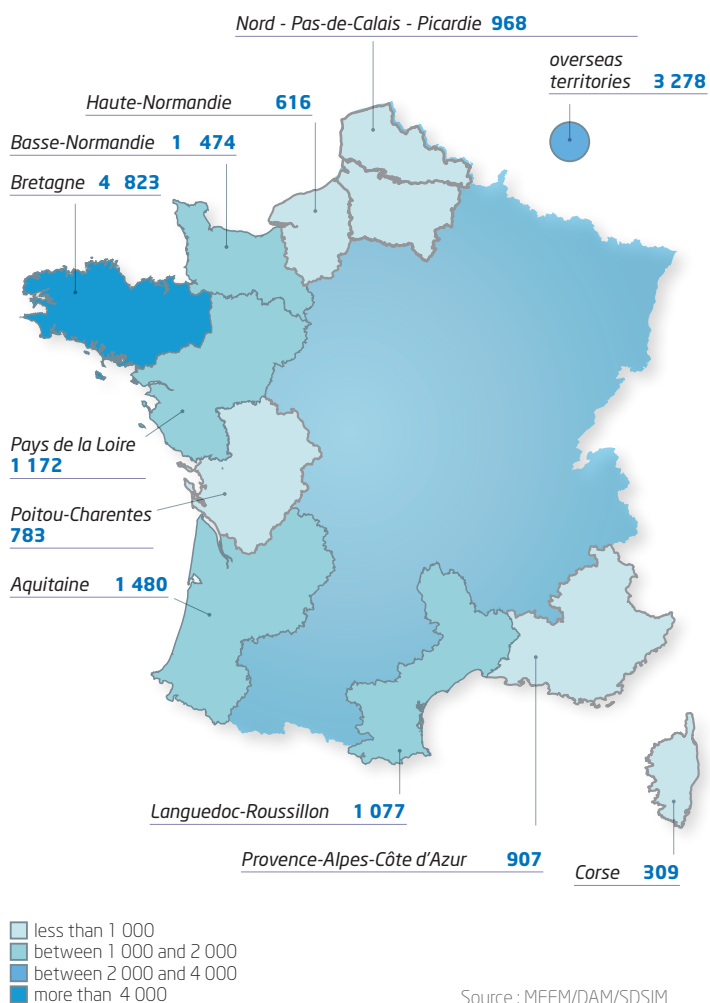
Total France



Metropolitan France



Regional sharing



Source : MEEM/DAM/SDSIM

Number of full time equivalent jobs in 2011 ⁽¹⁾

	jobs	FTEJ
shellfish farming	16 277	8 763
marine fish farming and sturgeon	674	617
continental salmonids farming	1 667	1 295

(1) including seasonal jobs

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

Firms

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



Fishmonger's in 2015

number of establishments



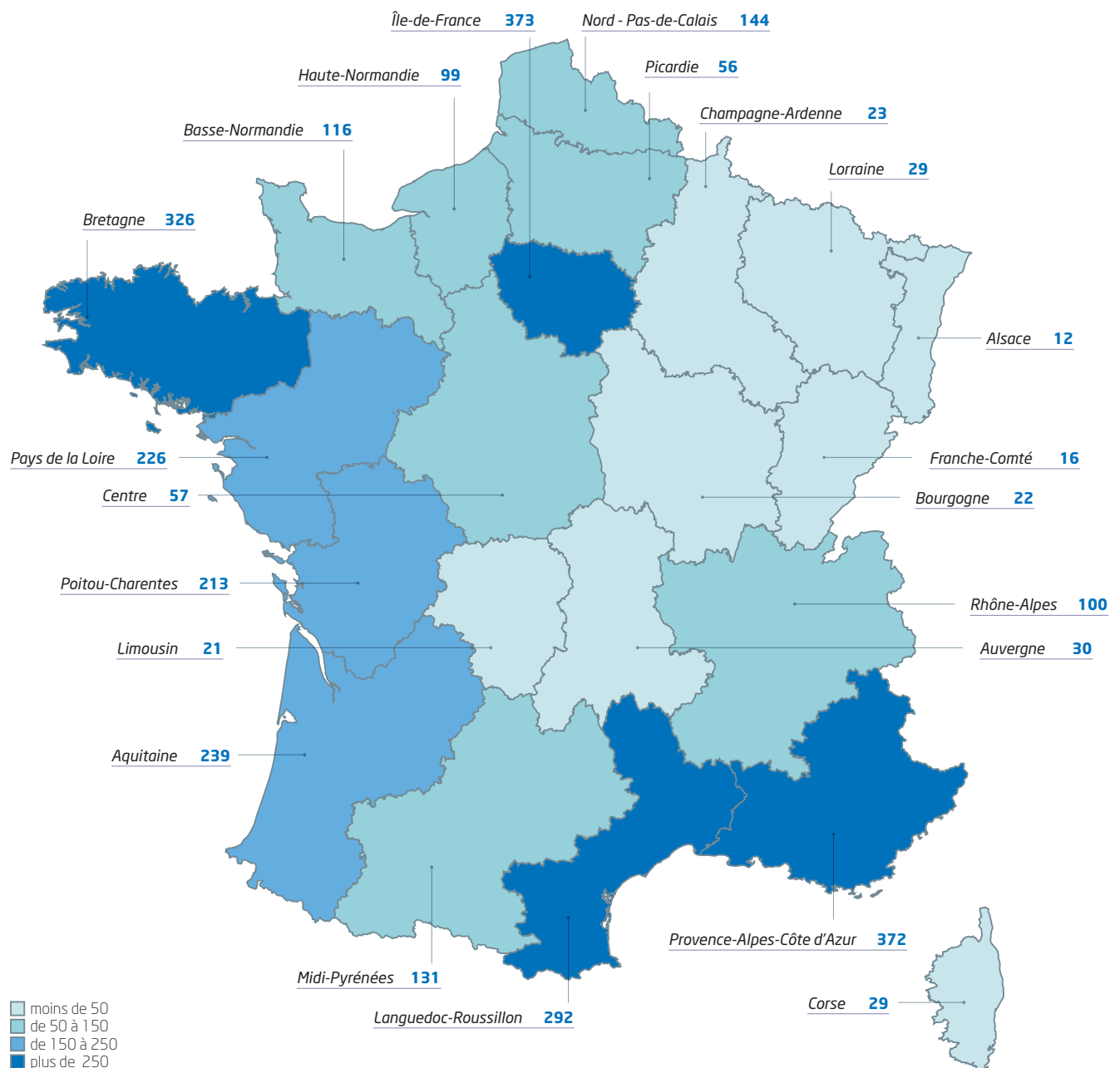
net sales



full time equivalent jobs



Number of establishments per region

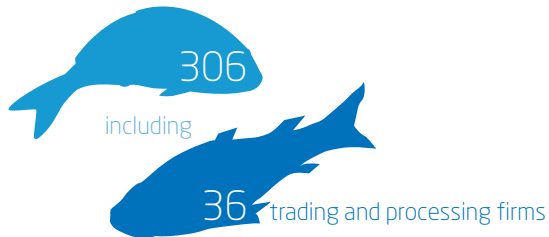


Sources : Via.Aqua and Proteis for FranceAgriMer

Trading firms

Trading firms in 2011

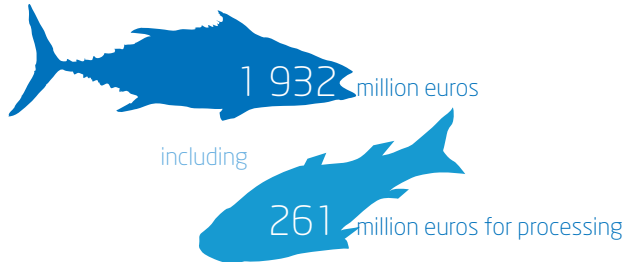
number of firms



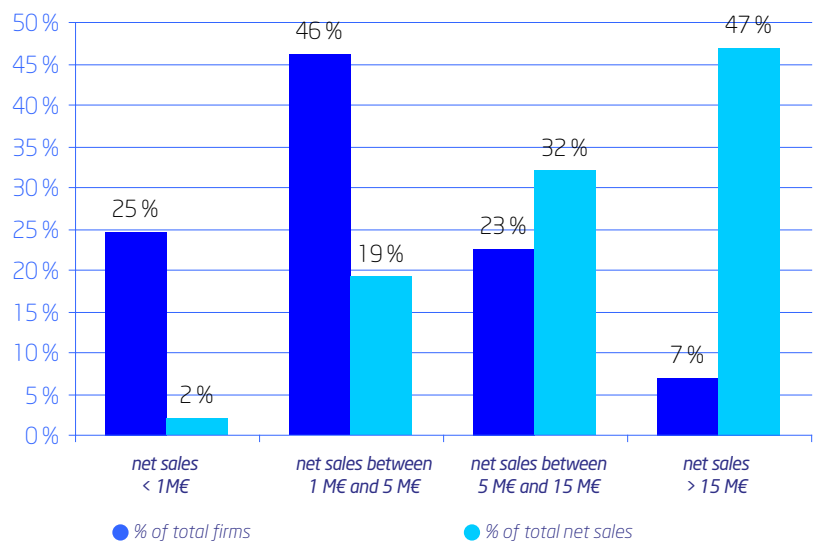
jobs



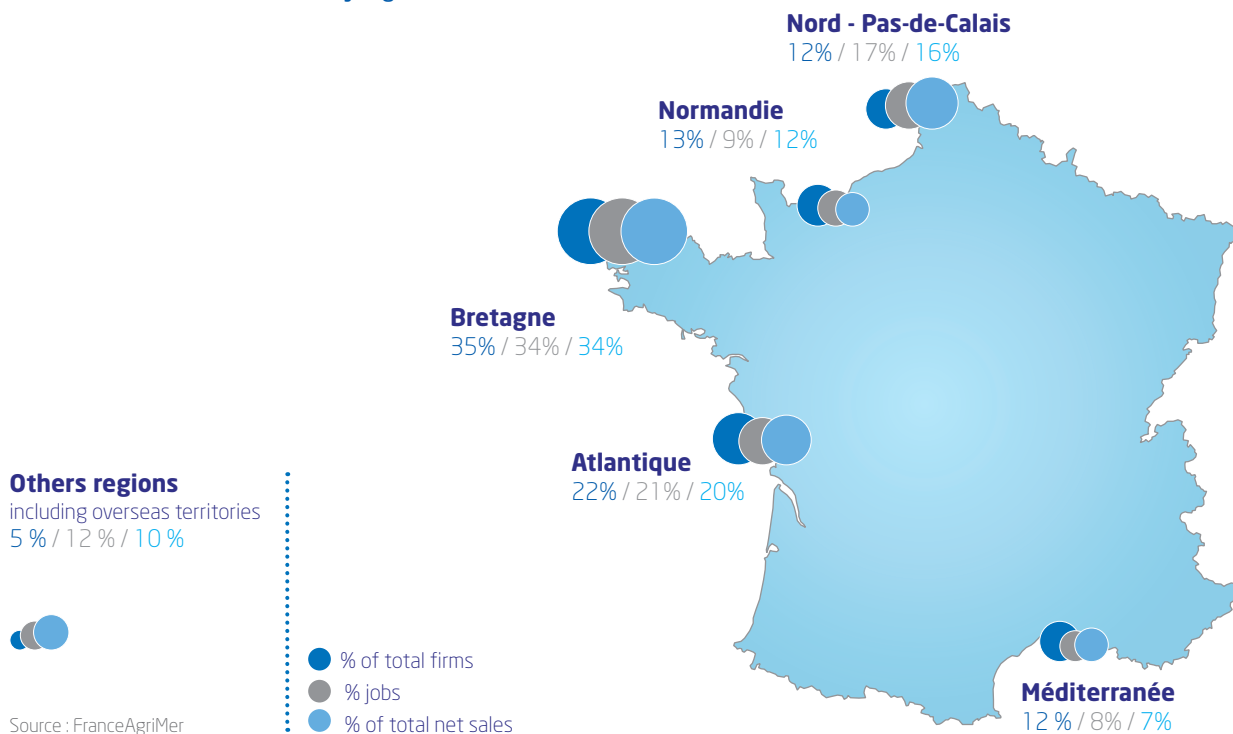
net sales



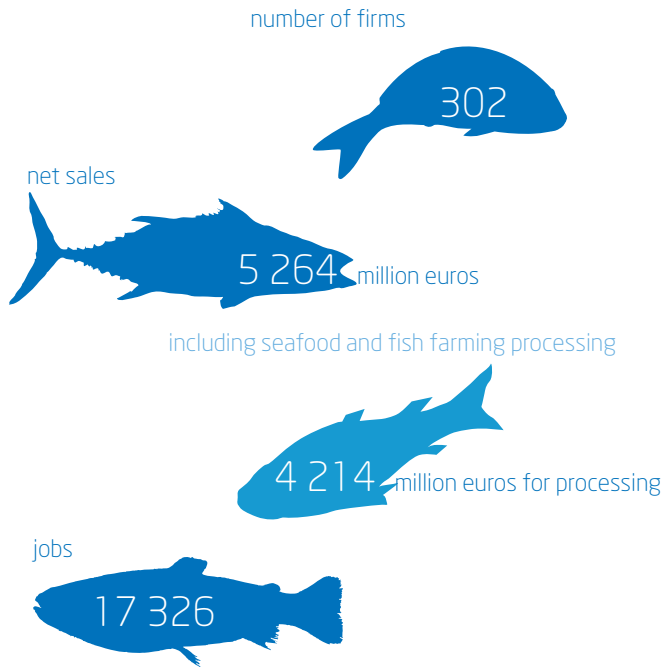
Breakdown of firms by total net sales



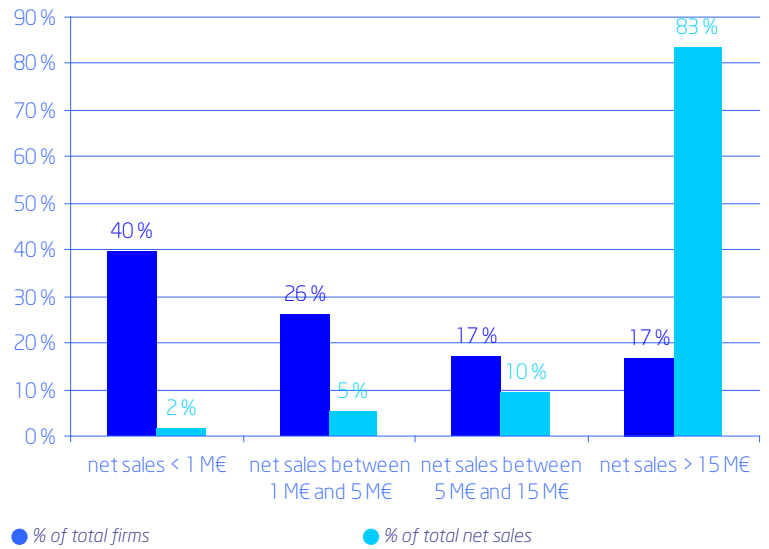
Breakdown of firms and total net sales by region



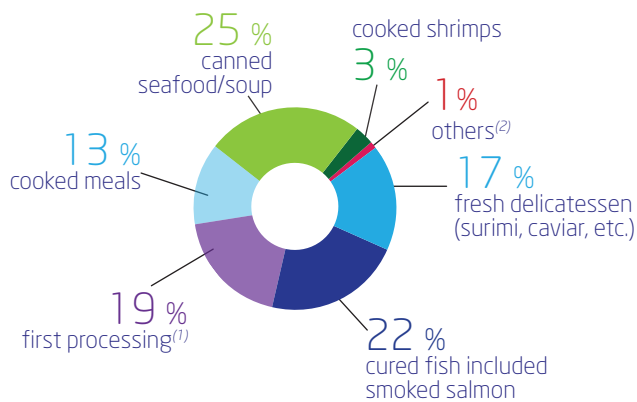
Processing main activity firms in 2014



Breakdown of firms by total net sales

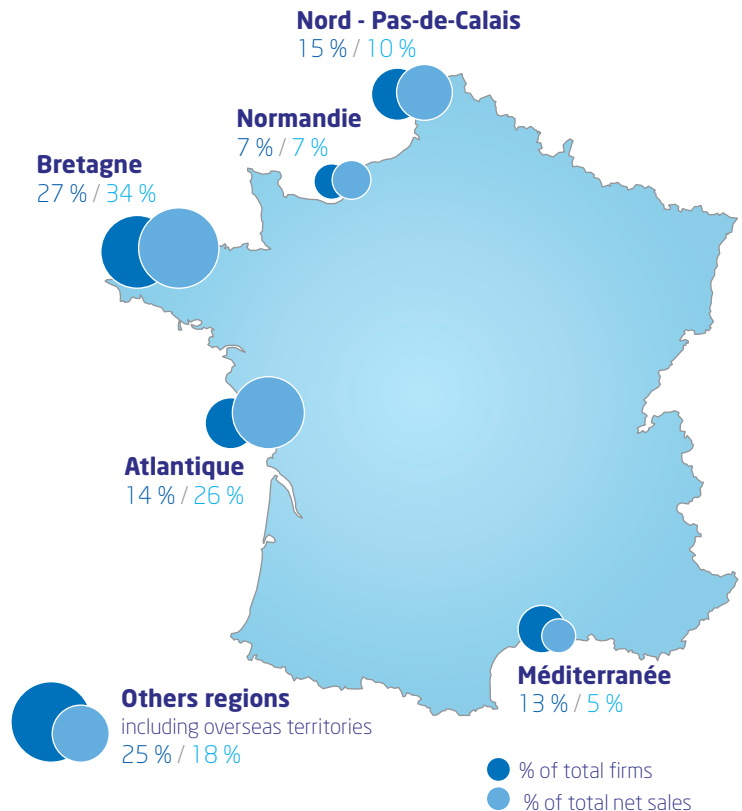


Seafood processing net sales



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

Breakdown of processing firms and sales by region



Trade

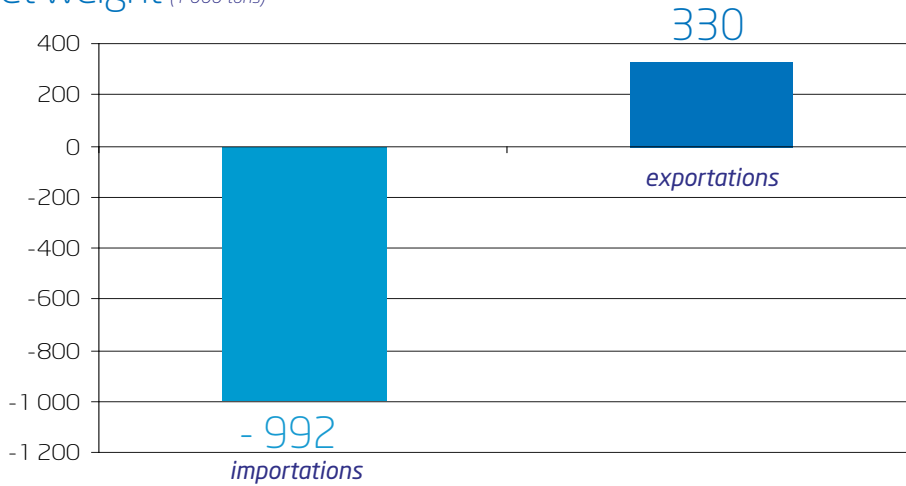
imports / exports

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

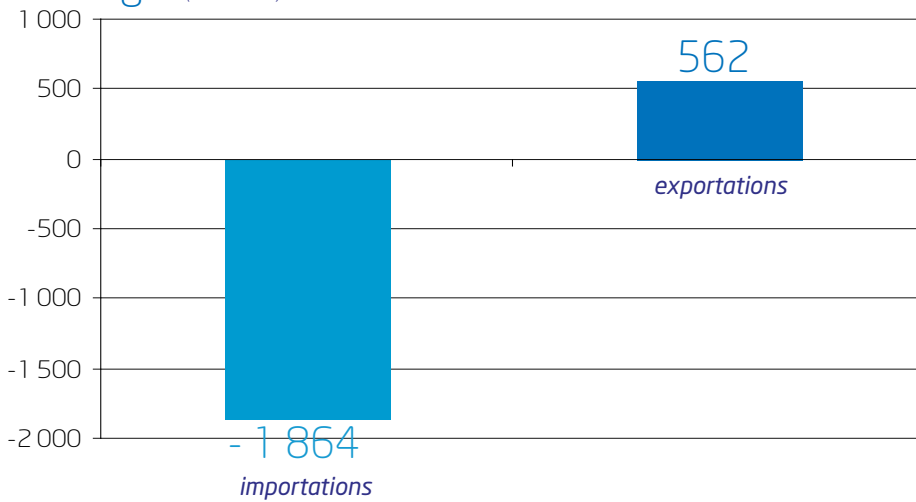


Supply balance in 2015

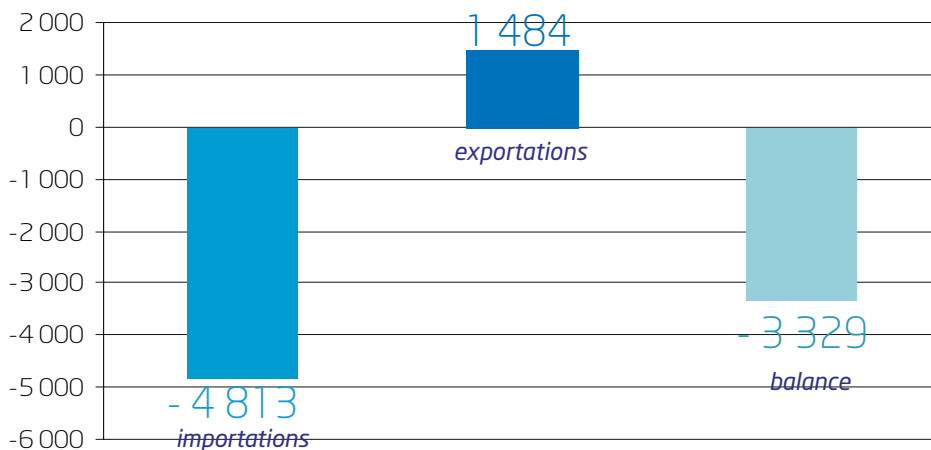
Net weight (1 000 tons)



Live weight (1 000 tons)



Value (million euros)

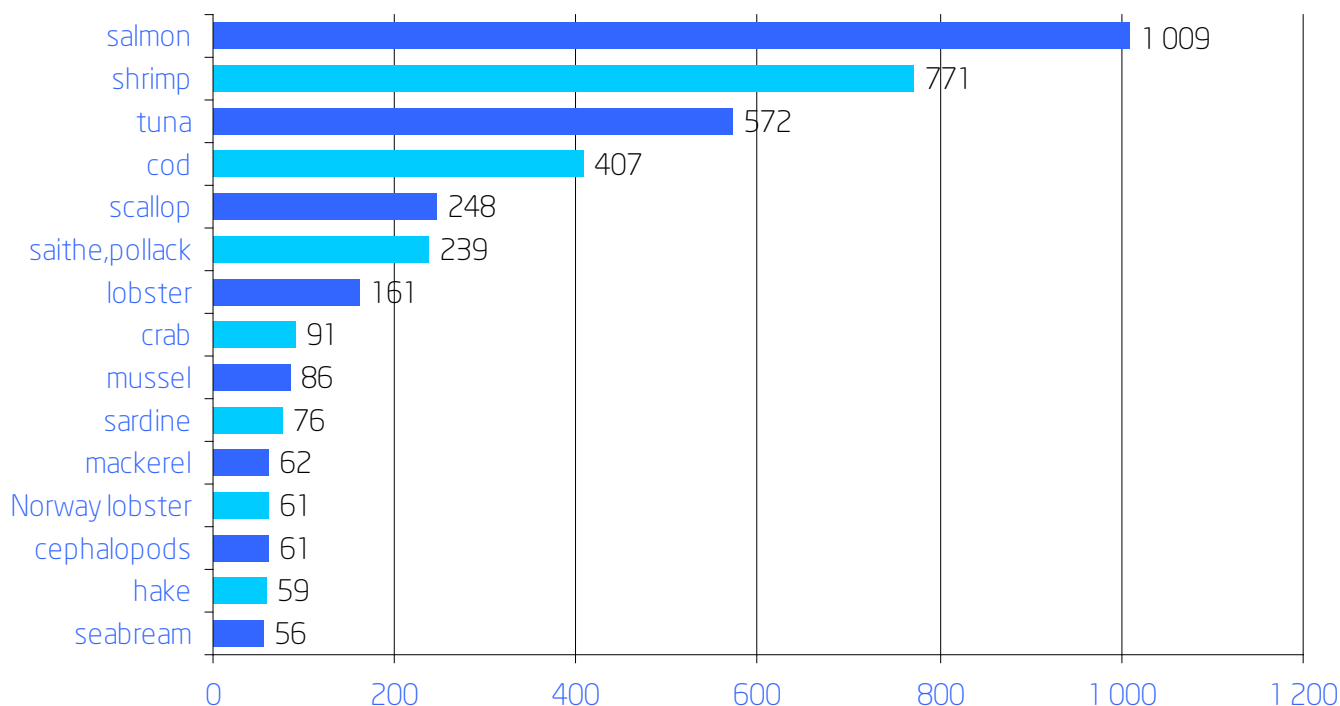


Source : French customs

Imports and exports / metropolitan France and overseas territories

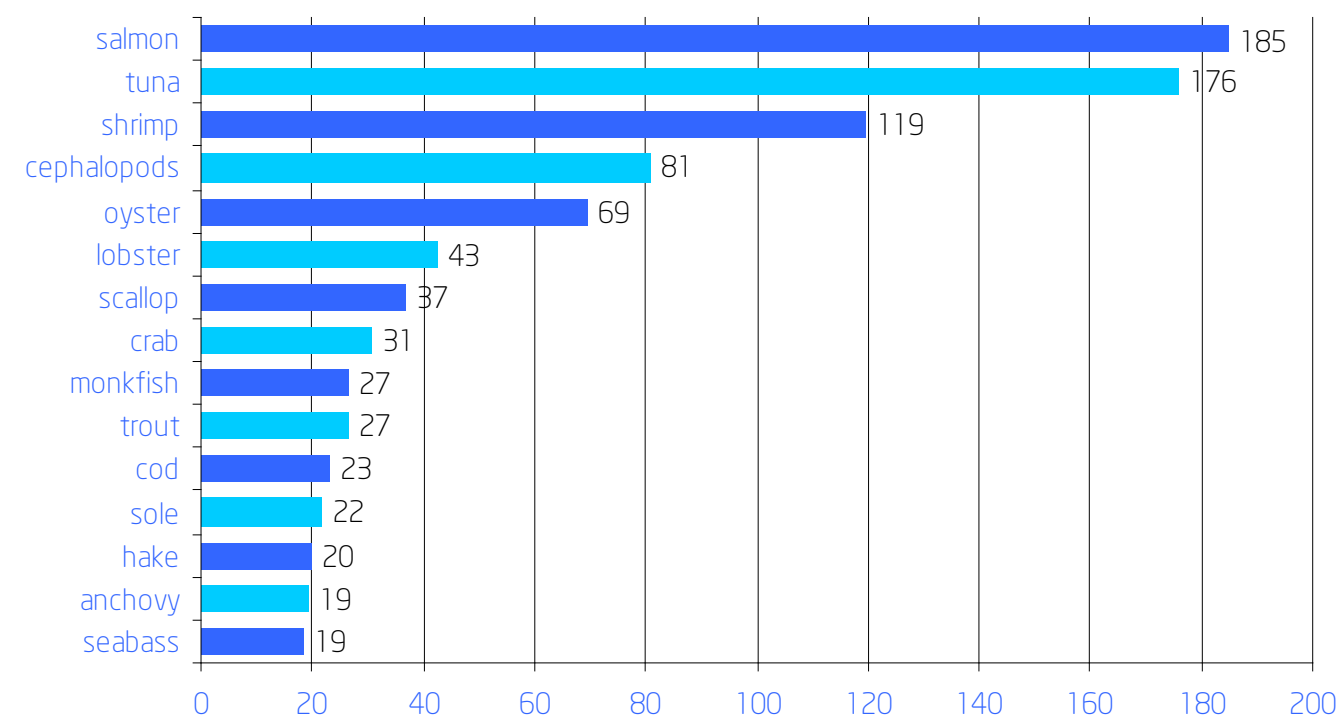
Imports - main species in 2015

Value (million euros)



Exports - main species in 2015

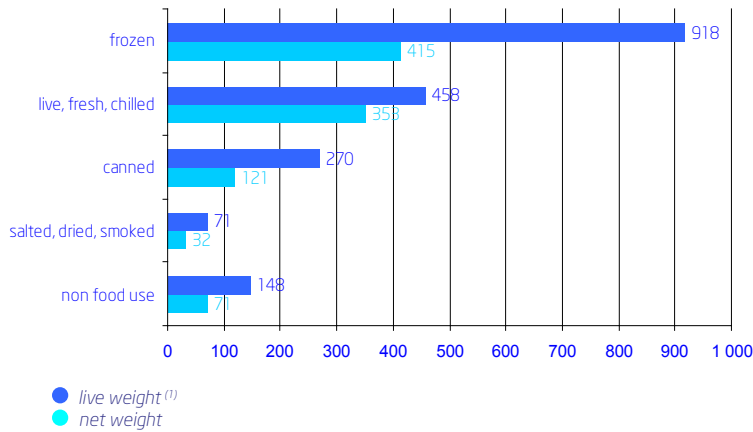
Value (million euros)



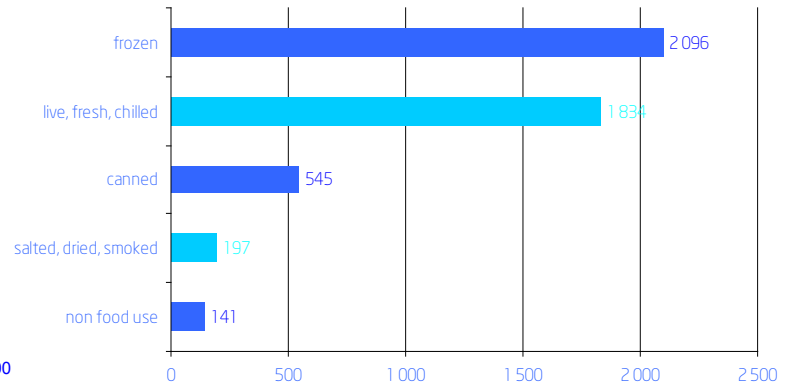
Source : French customs

Imports by presentation in 2015

Imports by volume (1 000 tons)

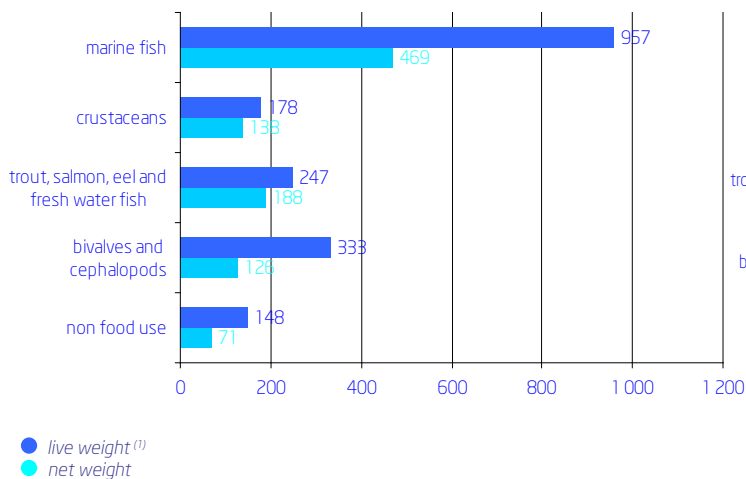


Imports by value (million euros)

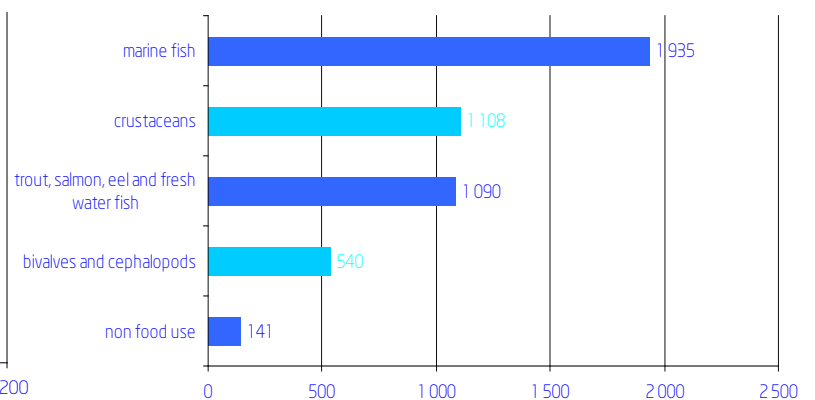


Imports by species group in 2015

Imports by volume (1 000 tons)



Imports by value (million euros)

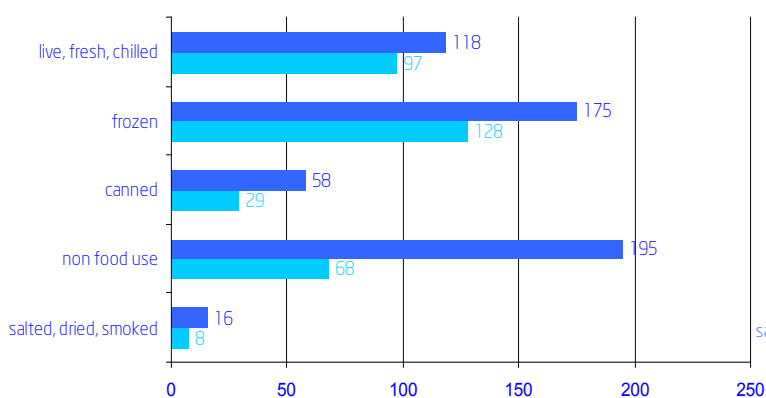


(1) data collection methodology is detailed on inside back cover -
Source : French customs

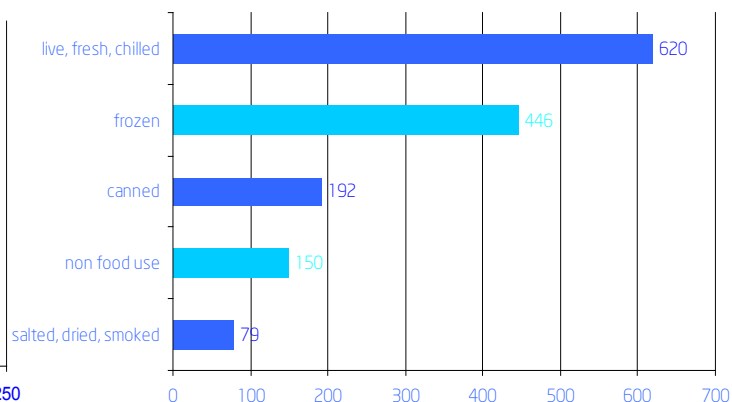
Imports and exports / metropolitan France and overseas territories

Exports by presentation in 2015

Exports by volume (1 000 tons)



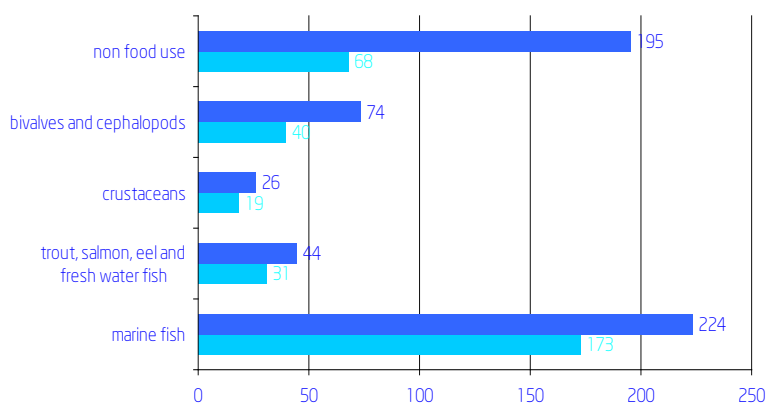
Exports by value (million euros)



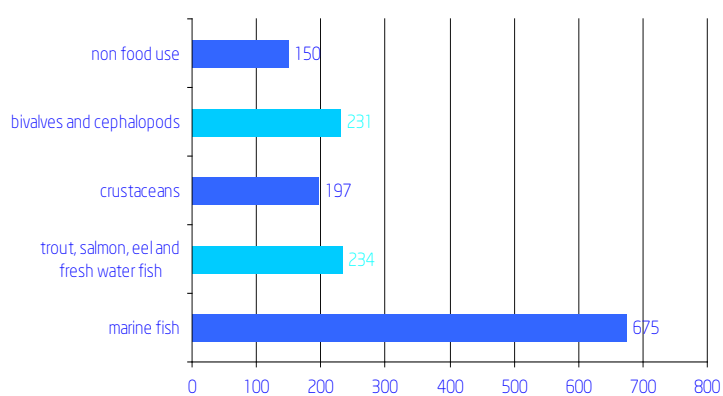
● live weight⁽¹⁾
● net weight

Exports by species group in 2015

Exports by volume (1 000 tons)



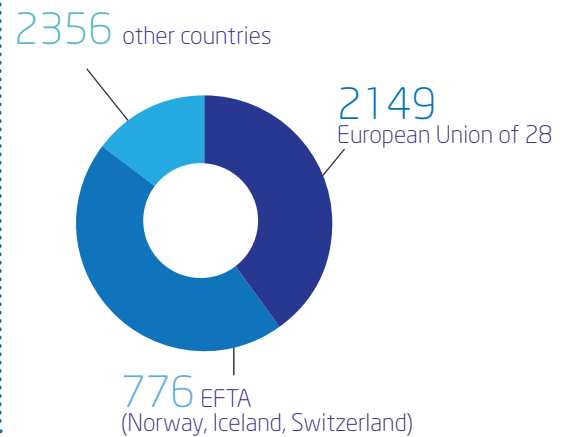
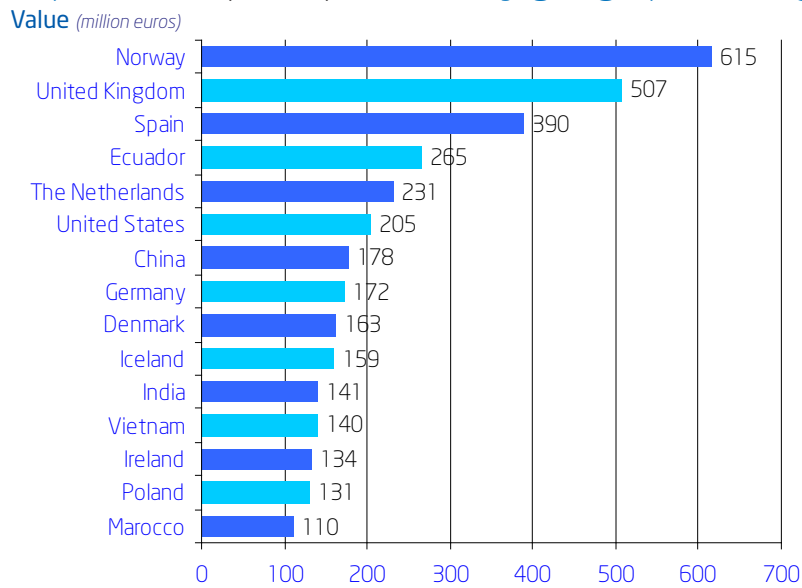
Exports by value (million euros)



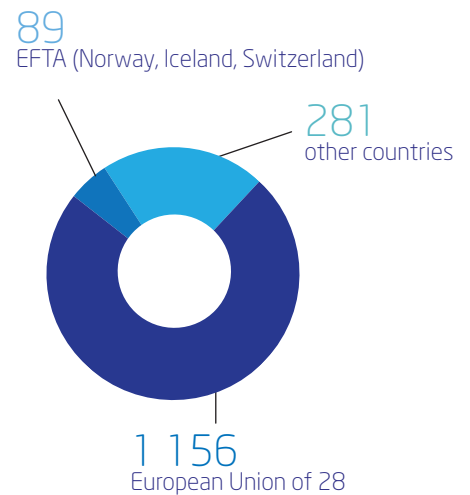
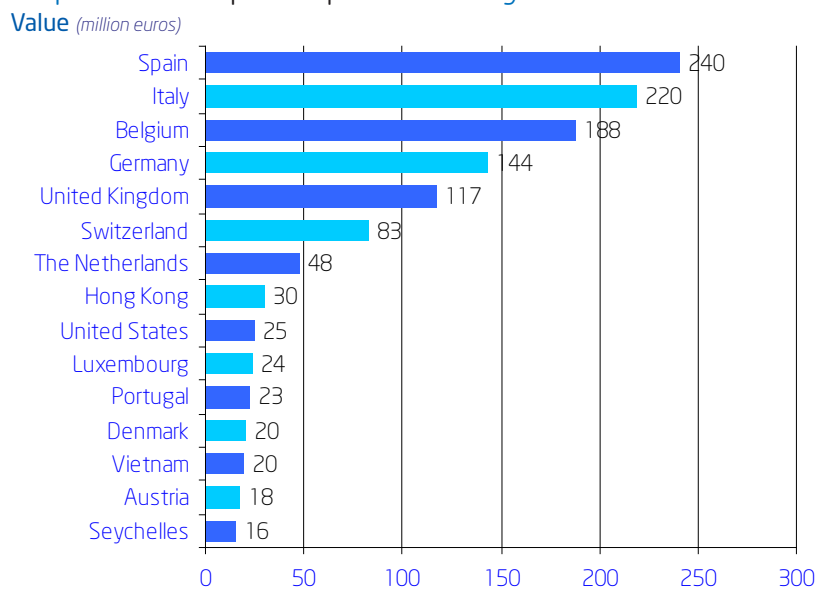
● live weight⁽¹⁾
● net weight

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

Imports of aquatic products by geographical origin in 2015



Exports of aquatic products by destination in 2015



Source : French Customs

Consumption



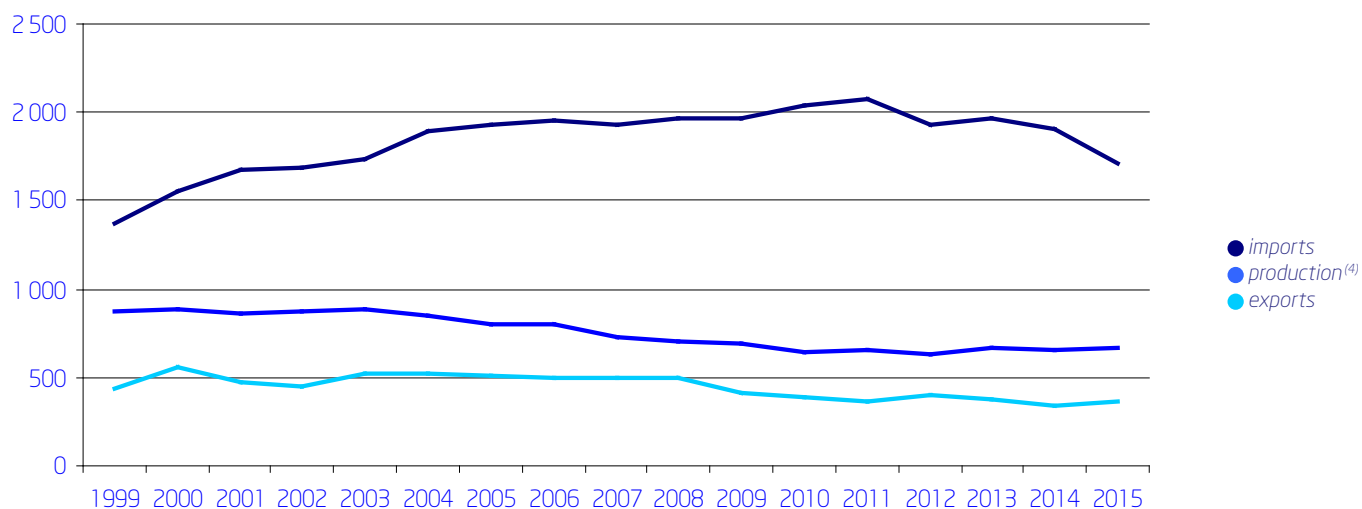
supply balance / purchases

households / catering / breakdown of purchases by distribution channel



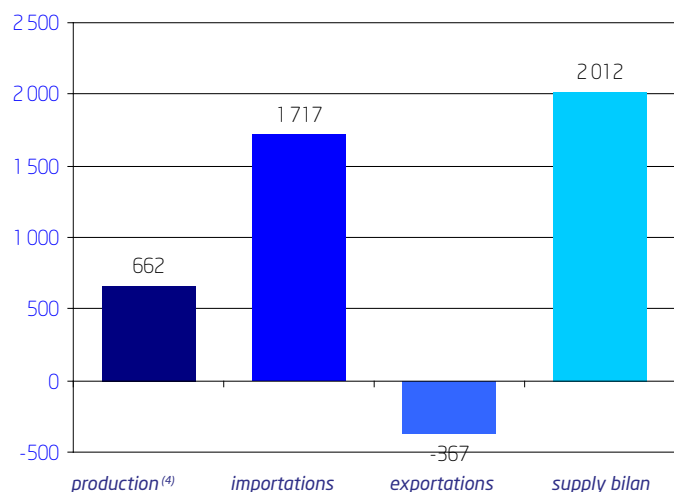
Balance changes in production, imports and exports ⁽¹⁾⁽²⁾⁽³⁾

(1 000 tons)

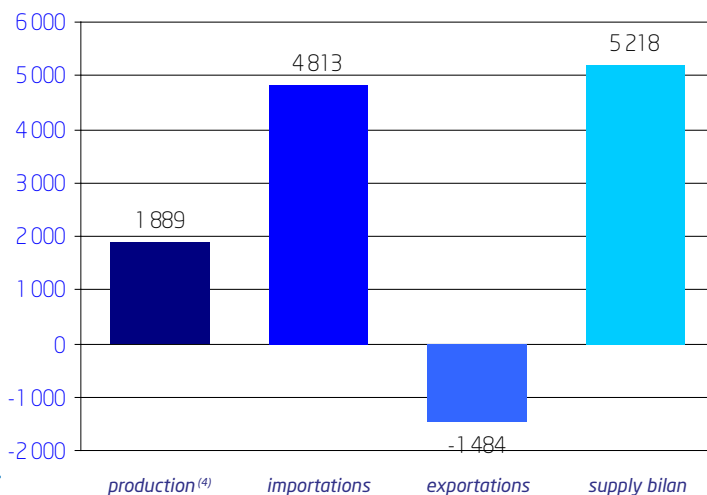


Supply balance in 2015 ⁽¹⁾⁽²⁾⁽³⁾

in volume (1 000 tons)



in value (million euros)



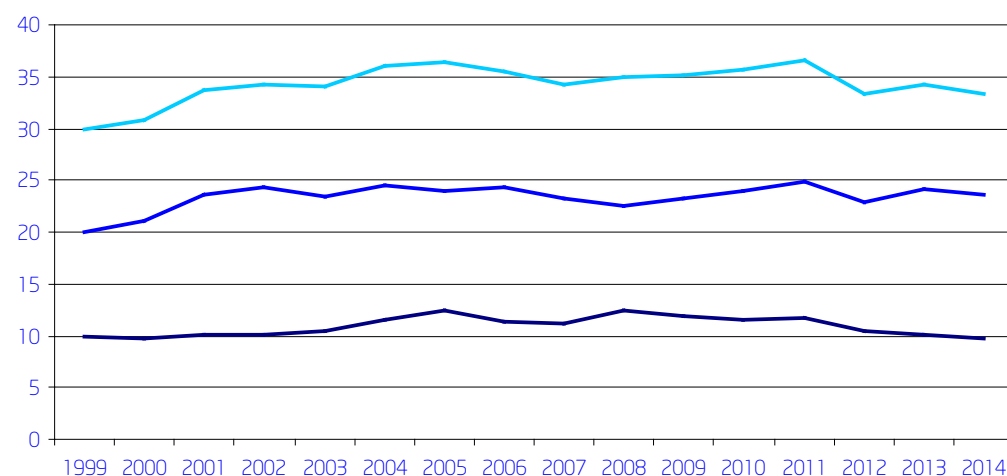
(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) excluding non food use - (4) estimates for 2014 -
Source : FranceAgriMer

Supply balance



Changes in supply balance ⁽¹⁾⁽²⁾

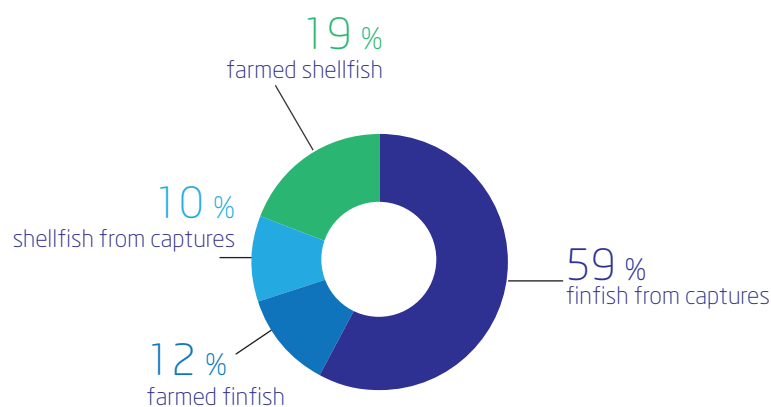
(kg)



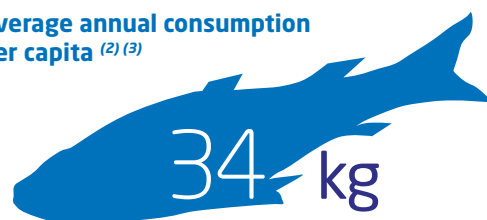
Average growth rate over the last ten years -1%

- shellfish (bivalves, crustaceans and cephalopods)
- finfish
- total

Breakdown by products in 2014 ⁽¹⁾⁽²⁾



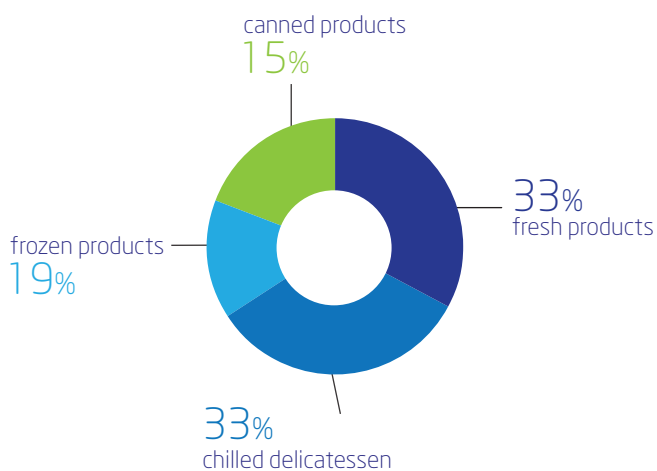
Average annual consumption per capita ^{(2) (3)}



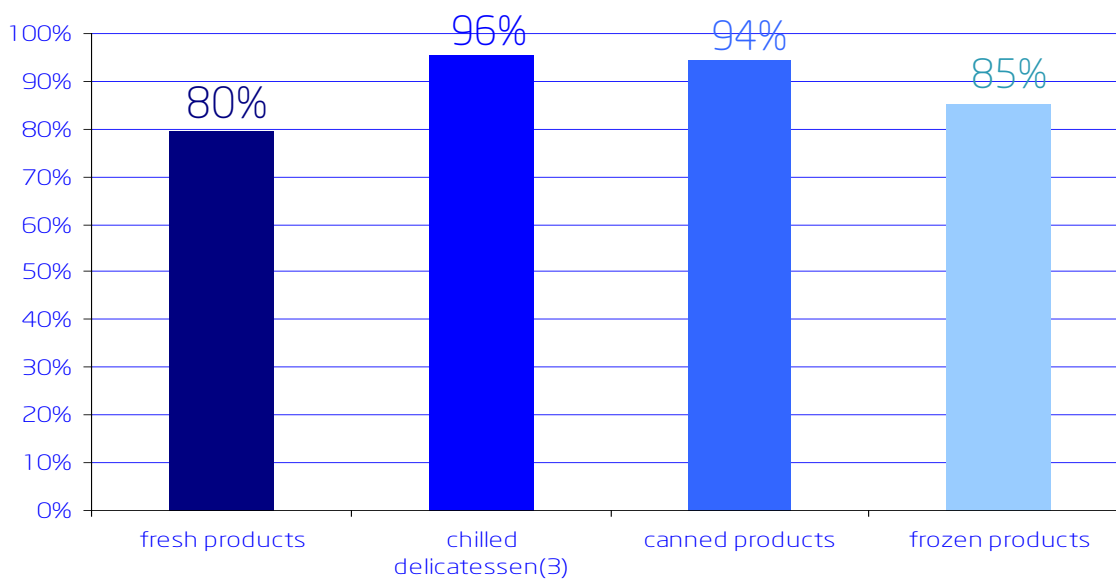
(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) average 2012-2014 - Source : FranceAgriMer



Households spending in 2015 ⁽¹⁾



Percentage of purchasing households in 2015 ⁽²⁾

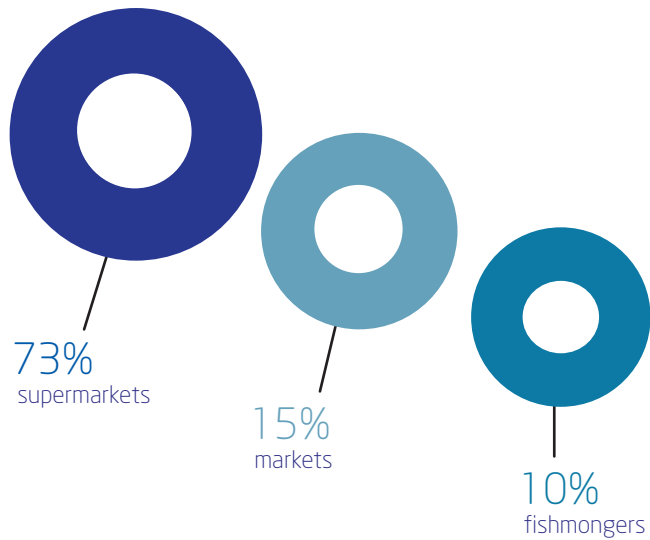


(1) data collection methodology is detailed on inside back cover - (2) a purchasing households buys the product at least once a year - (3) with bar code - Source : FranceAgriMer following Kantar Worldpanel

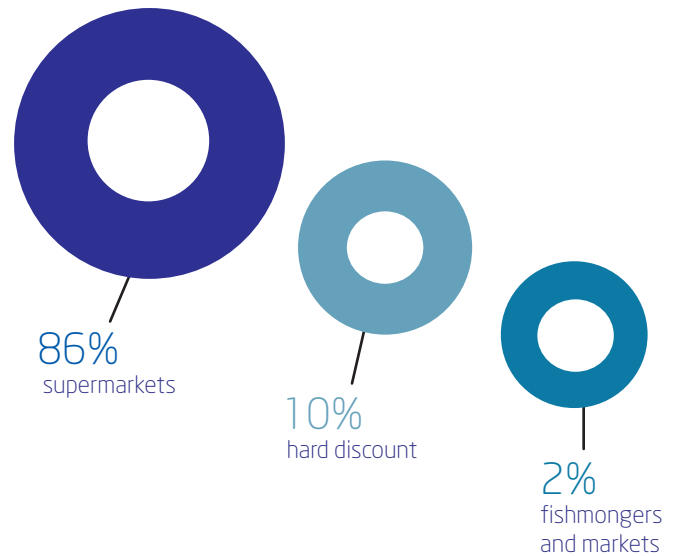
Purchases by French households for home consumption

Purchases of aquatic products by french households for home consumption in 2015⁽¹⁾

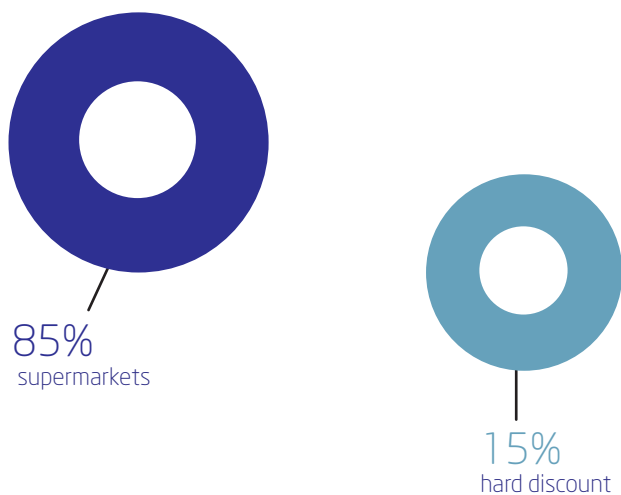
Fresh products



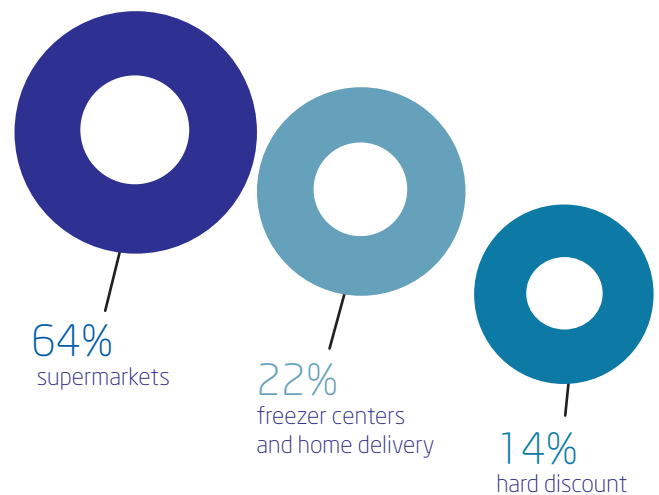
Chilled delicatessen



Canned products



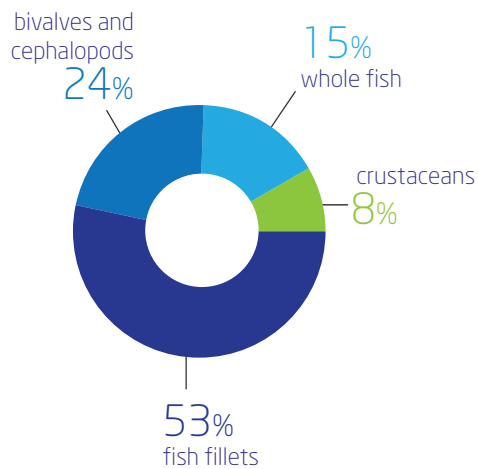
Frozen products



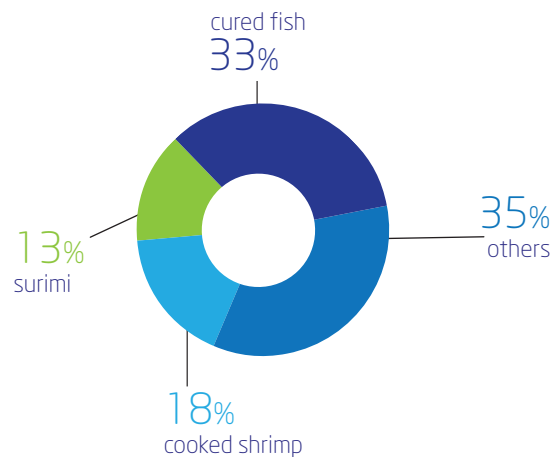
(1) data collection methodology is detailed on inside back cover -
Source : FranceAgriMer following Kantar Worldpanel

Breakdown of expenditures by presentation and species group in 2015 ⁽¹⁾

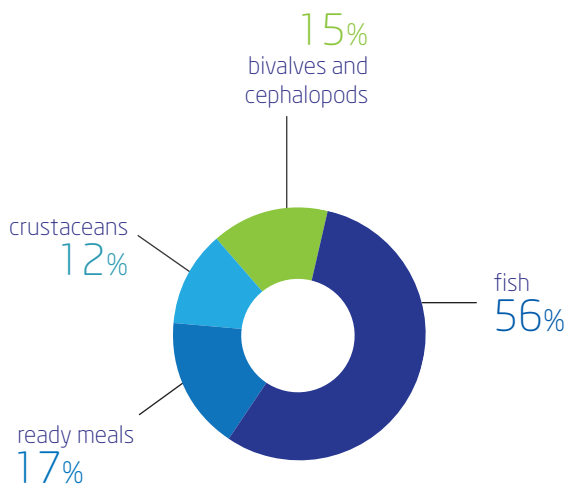
Fresh products



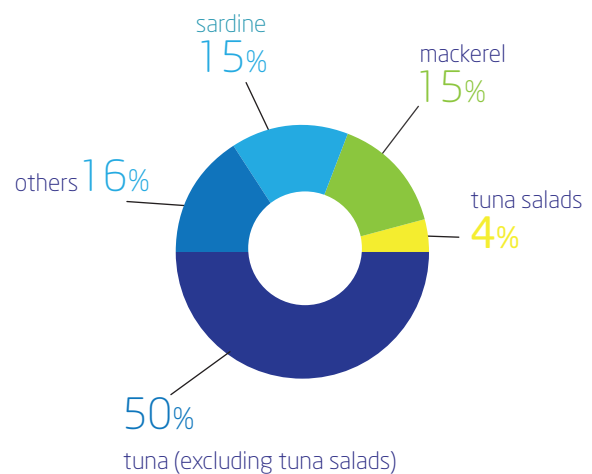
Chilled delicatessen



Frozen products



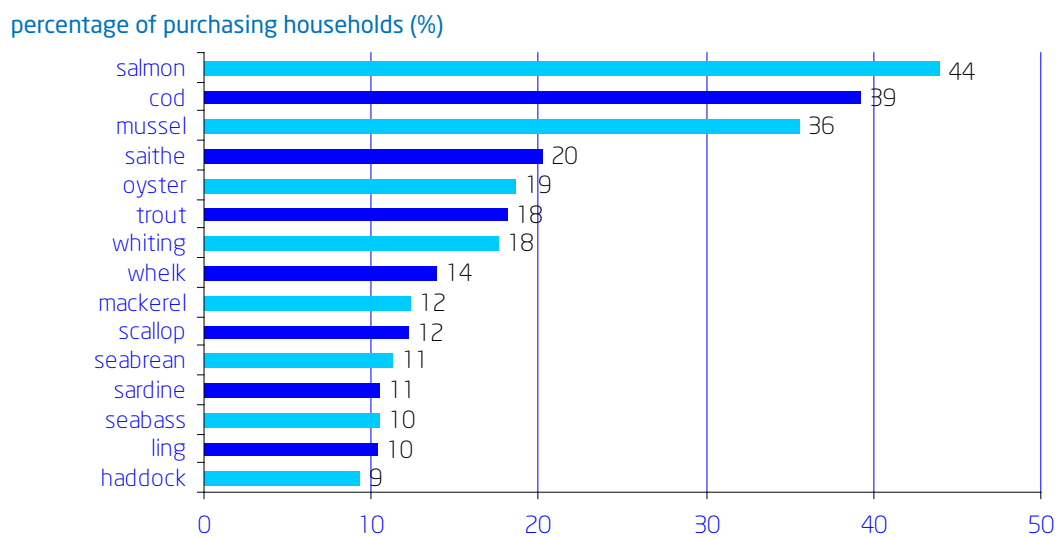
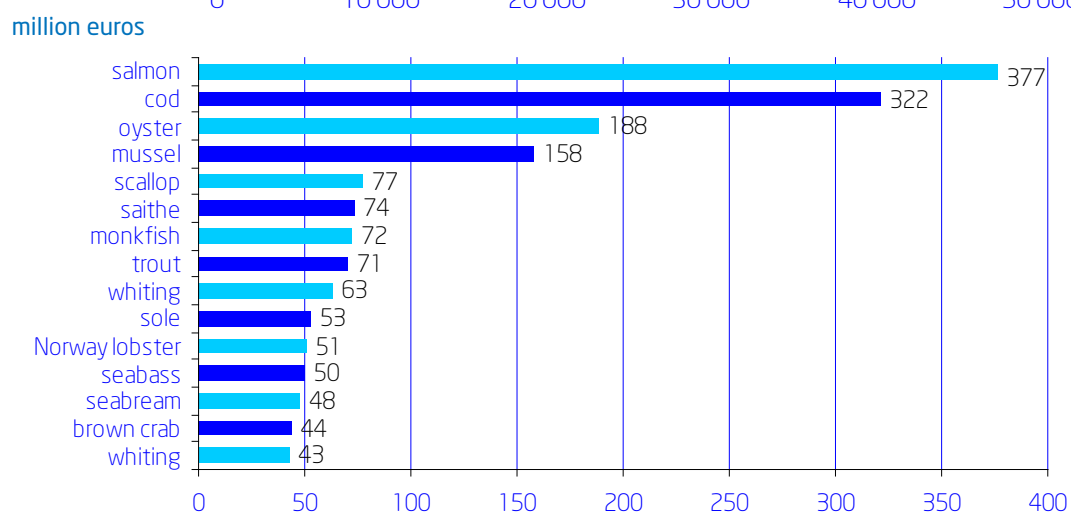
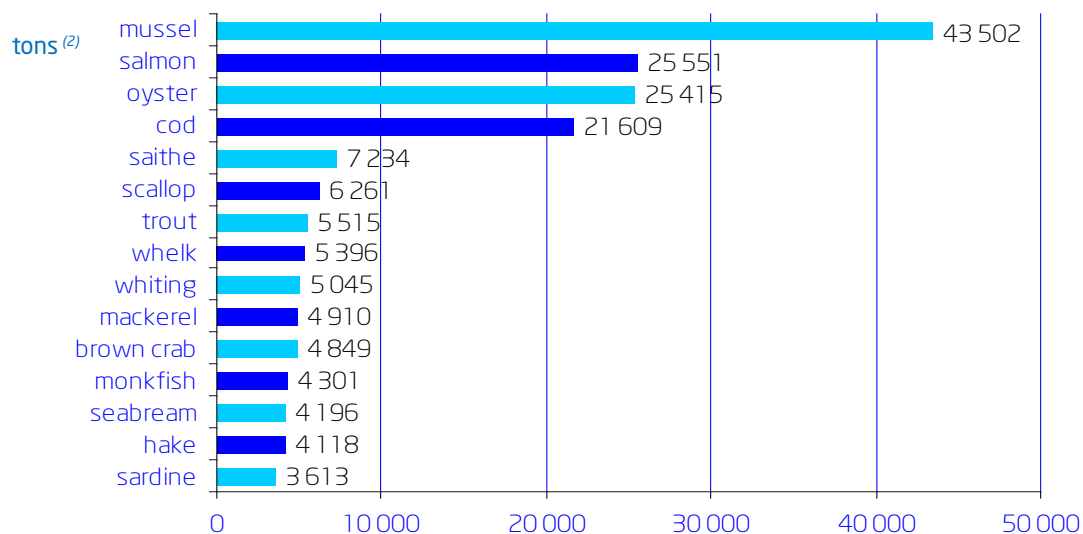
Canned products



(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 2015 ⁽¹⁾

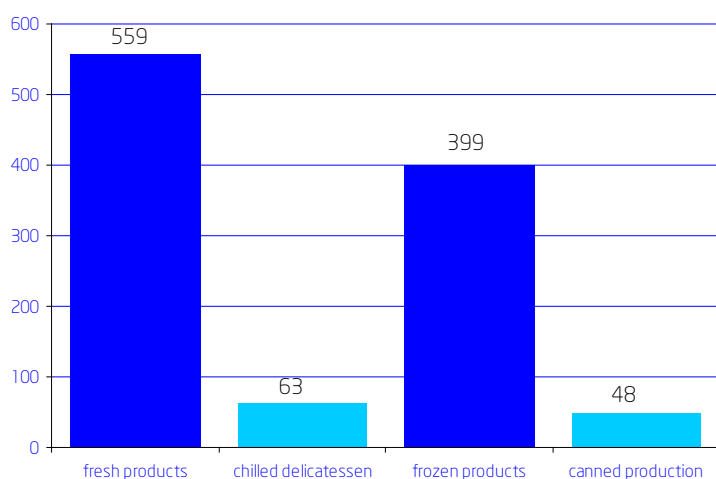


⁽¹⁾ data collection methodology is detailed on inside back cover - ⁽²⁾ net weight
Source : FranceAgriMer following Kantar Worldpanel

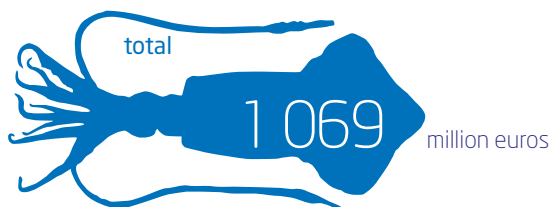
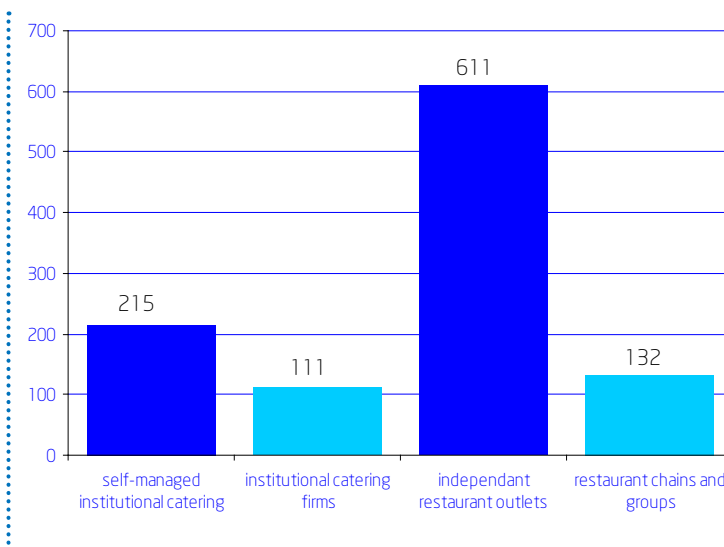


Spending in 2014

by presentation (million euros)



by catering outlet type (million euros)

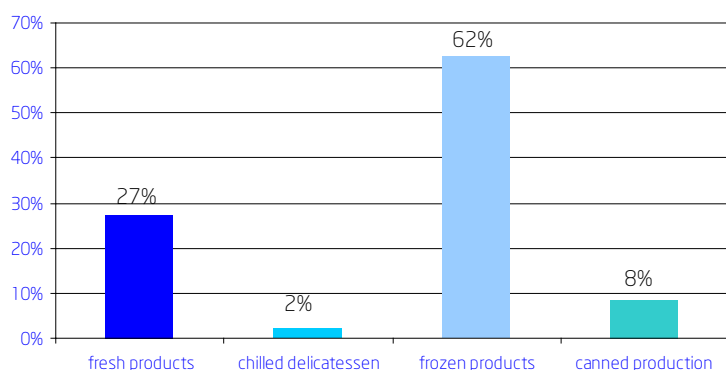


Source : FranceAgriMer following Crédoc

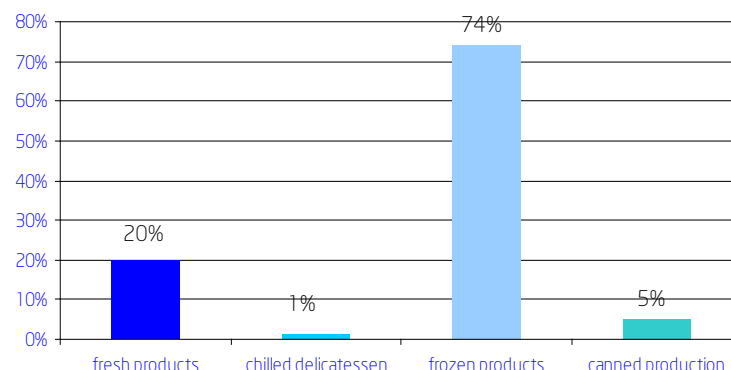
Purchases of aquatic products by the catering sector

Spending by catering outlet and by presentation in 2014

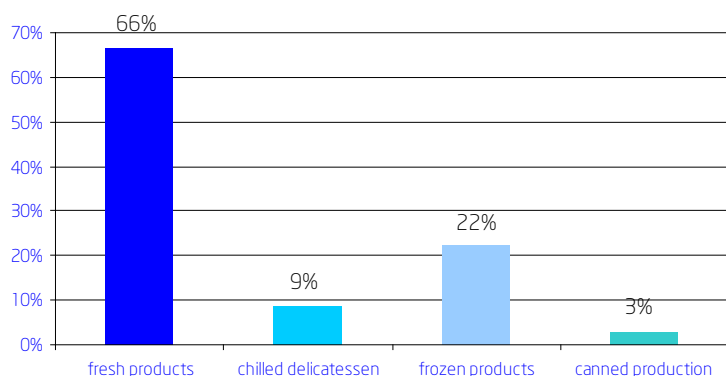
Self-managed institutional catering



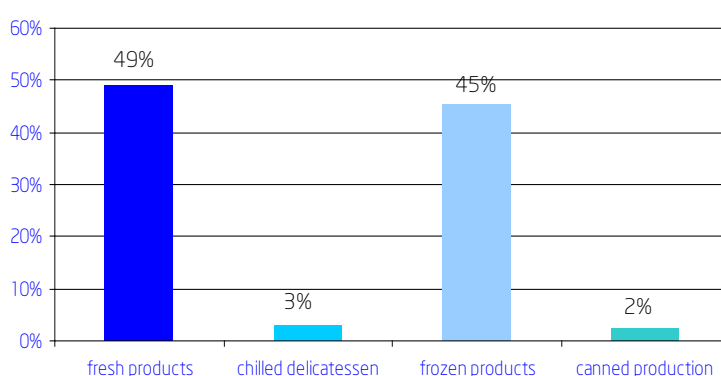
Institutional catering firms



Independent restaurant outlets



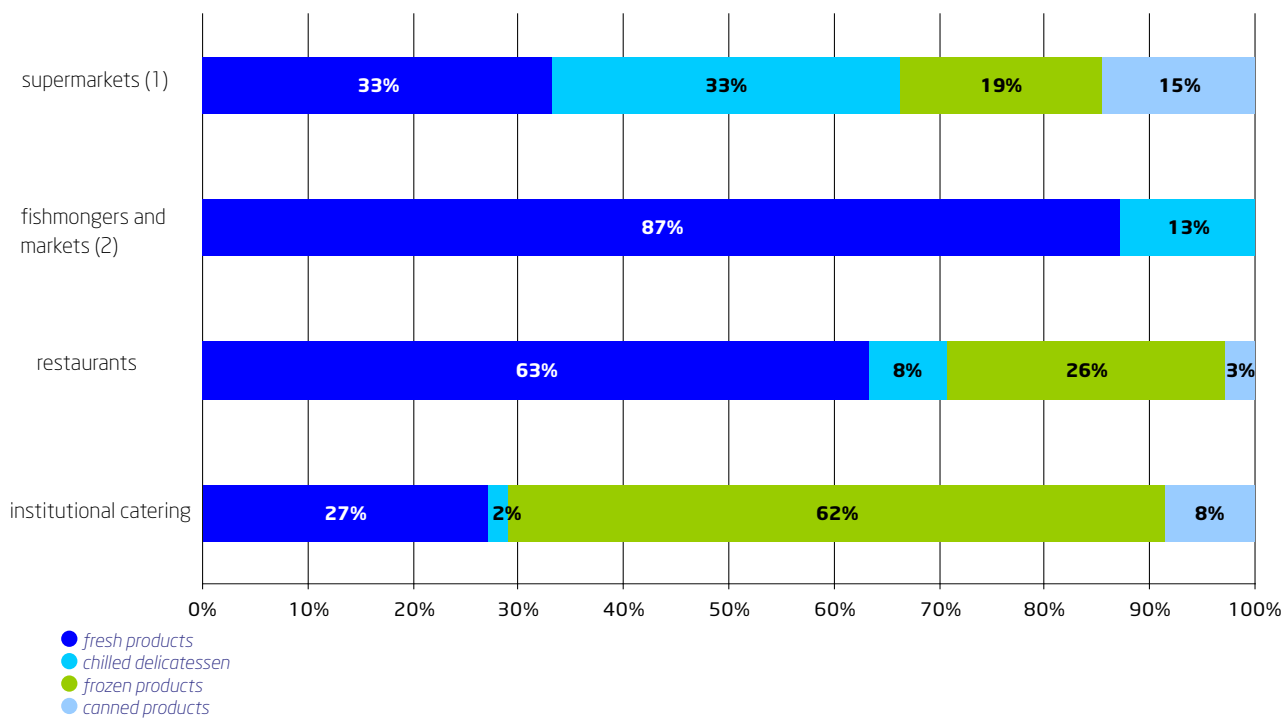
Restaurant chains and groups



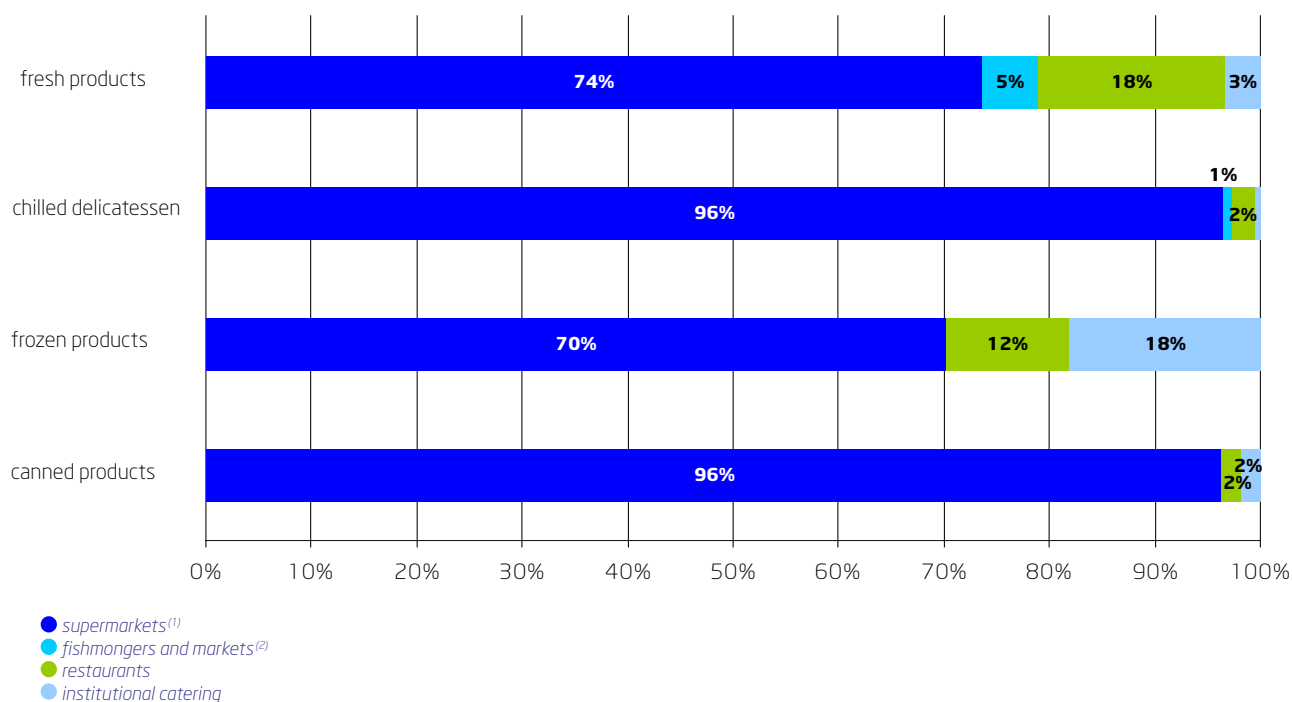
Source : FranceAgriMer following Crédoc

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 on april the 11th 2016.
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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 2015 among main or secondary processing activity identified firms. Besides, information about non-processing trading firms arises from FranceAgriMer's updated fish trading firms database (notably following the French National Institute for Statistics and Economic Studies' firm lists, sanitary approvals, financial databases and professional sources).
.....

Consumption French consumption may be measured in two ways :
• firstly, by calculating supply balance or apparent consumption (production + imports - exports),
• secondly by using consumer and restaurant panels.

Apparent consumption is measured in live weight equivalent and includes the overseas territories (French Caribbean Islands, Reunion Island 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 2015 des ventes déclarées en halles à marée*
- Bilan annuel FranceAgriMer 2015 du commerce extérieur des produits de la pêche et de l'aquaculture*
- Bilan annuel FranceAgriMer 2015 de la consommation des produits de la pêche et de l'aquaculture*

* coming 2016
.....

Ric Réseau inter criées

MEEM Ministère de l'Environnement, de l'Énergie et de la Mer

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

