



RÉPUBLIQUE  
FRANÇAISE

*Liberté  
Égalité  
Fraternité*



FranceAgriMer

ÉTABLISSEMENT NATIONAL  
DES PRODUITS DE L'AGRICULTURE ET DE LA MER

LES  
DONNÉES



# The fisheries and aquaculture sector in France (2020)

Production - Firms - Trade - Consumption



# SUMMARY

---

## Production page 2

---

France in the EU-28 & in the world in 2017  
Total sales of fisheries and aquaculture products  
Sales of fisheries products at auction  
Sales of aquaculture products  
Fishing fleet  
Aquaculture firms  
Jobs

---

## Firms page 14

---

Fishmonger firms  
Trading firms  
Processing firms

---

## Trade page 18

---

Supply balance  
Imports and exports by main species  
Imports and exports by presentation  
Imports and exports by species group  
Imports and exports by geographical area

---

## Consumption page 24

---

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



---

# PRODUCTION

---

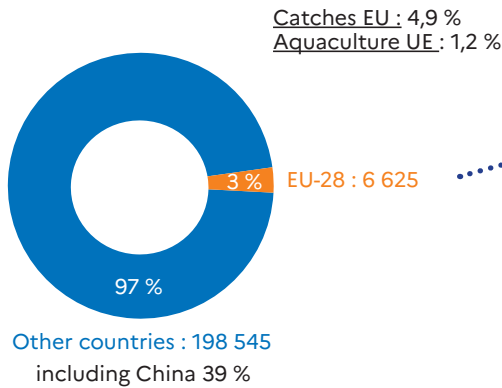
## FISHING FLEET / AQUACULTURE FIRMS / JOBS

Total sales of fisheries and aquaculture products

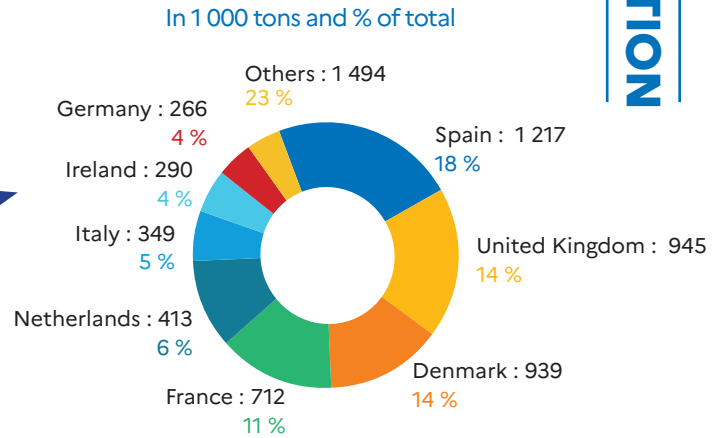


# • Total sales / metropolitan France and overseas territories

## France in the EU-28 and in the world in 2017



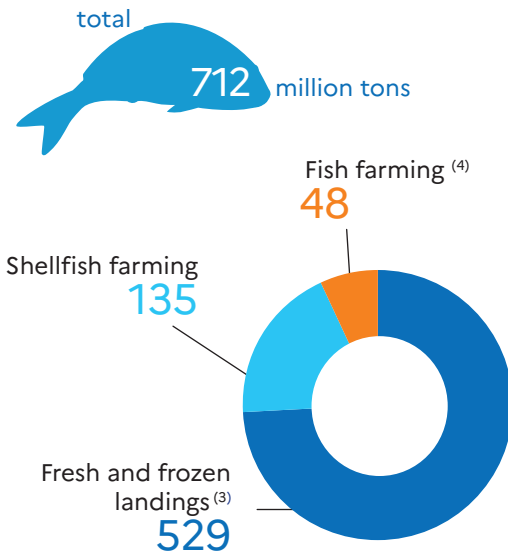
Source : FAO



Source : Eumofa

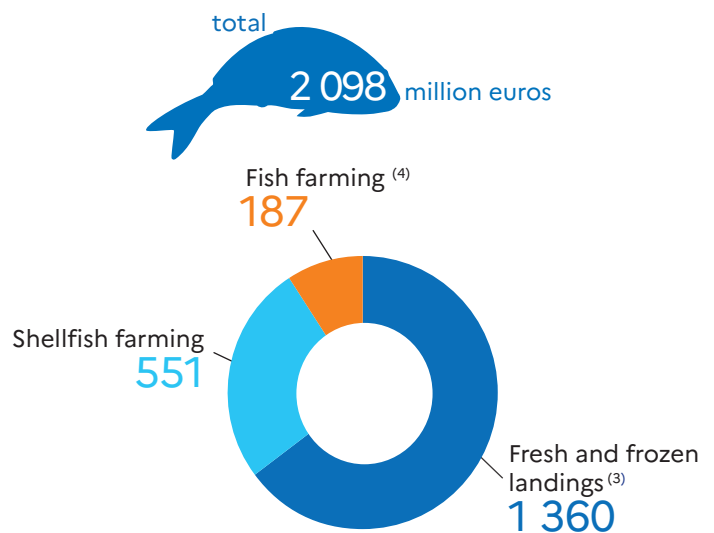
## Quantities sold in 2017 <sup>(1)</sup>

by method of production (1 000 tons) (2)



## Values of sales <sup>(2)</sup>

by method of production (millions euros)



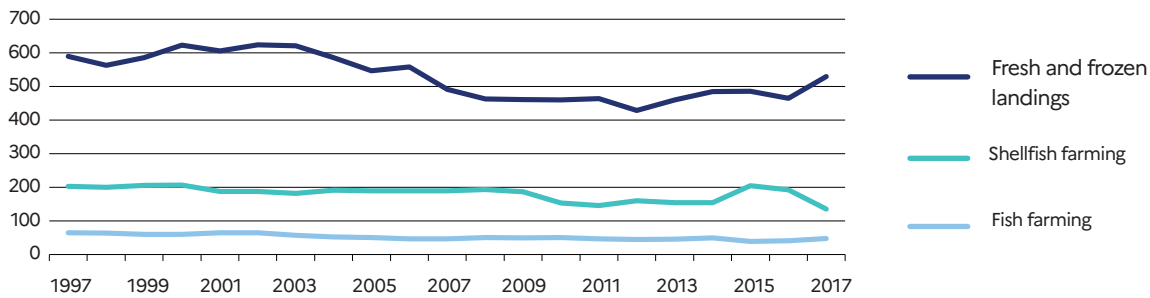
(1) Excluding seaweeds - (2) Equivalent live weight - (3) Total sales to processing industry and export sales - (4) Including farmed crustaceans

Source : MAA /DPMA/Eumofa

## • Total sales / metropolitan France and overseas territories

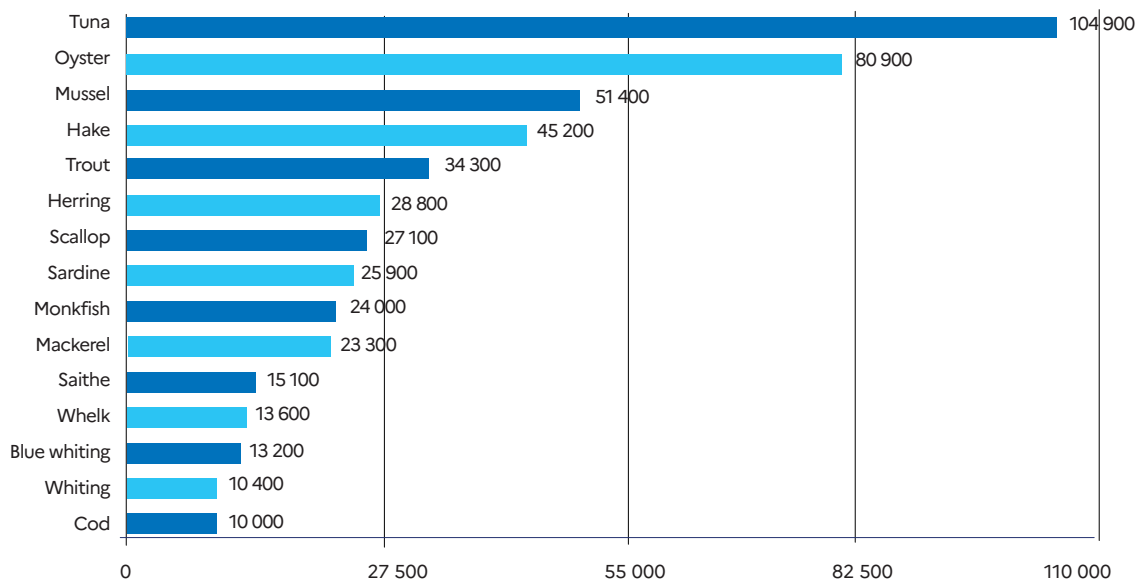
### Changes in quantities sold in metropolitan France <sup>(1)</sup>

(1 000 tons) (3)



### Main species sold in metropolitan France in 2017 <sup>(2)</sup> <sup>(3)</sup>

(in tons) (2)



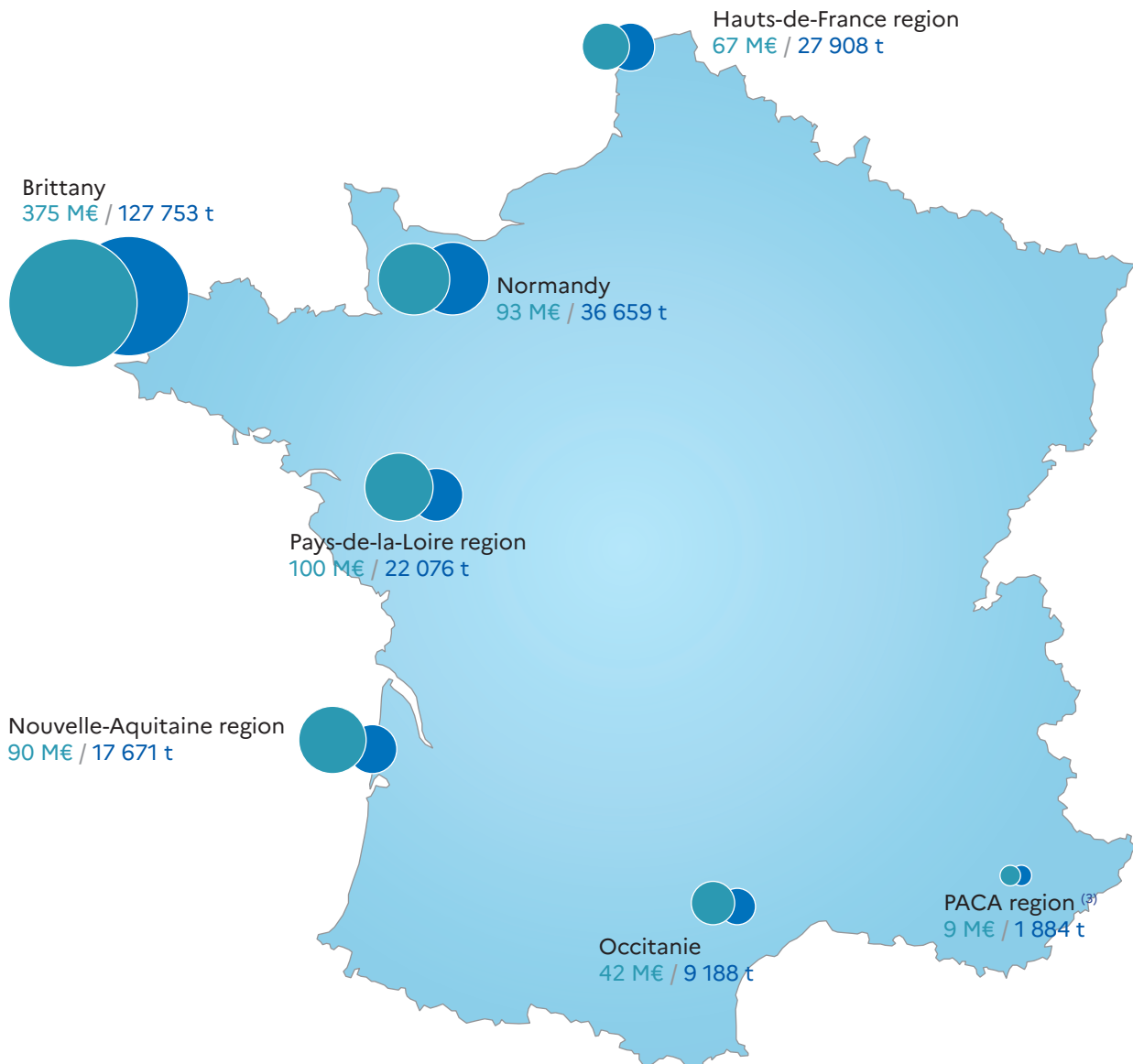
(1) Excluding seaweeds - (2) Equivalent live weight - (3) Total sales to processing industry and export sales - (4) Including farmed crustaceans

Source : MAA /DPMA

# • Sales of fishery products

## Fresh and frozen landings by region in 2019 <sup>(1)</sup>

Sales  
Value (million euros) / Quantity (tons) <sup>(2)</sup>



(1) Excluding seaweeds and freshwater fishing

(2) In net weight

(3) Sales without auction - VISIOMer

Source : VISIOMer/FranceAgriMer

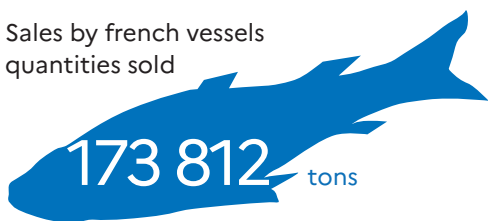
# • Sales of fishery products

## Sales of fishery products at auction in 2019

Number of auctions in 2019 : **37**

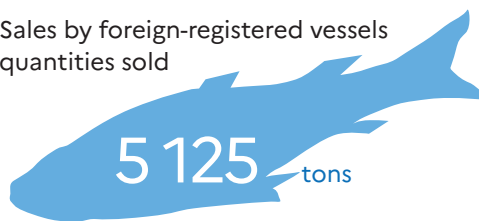


Sales by french vessels  
quantities sold



Value of sales **599** million euros

Sales by foreign-registered vessels  
quantities sold



Value of sales **16** million euros

Source : VISIOMer/ FranceAgriMer

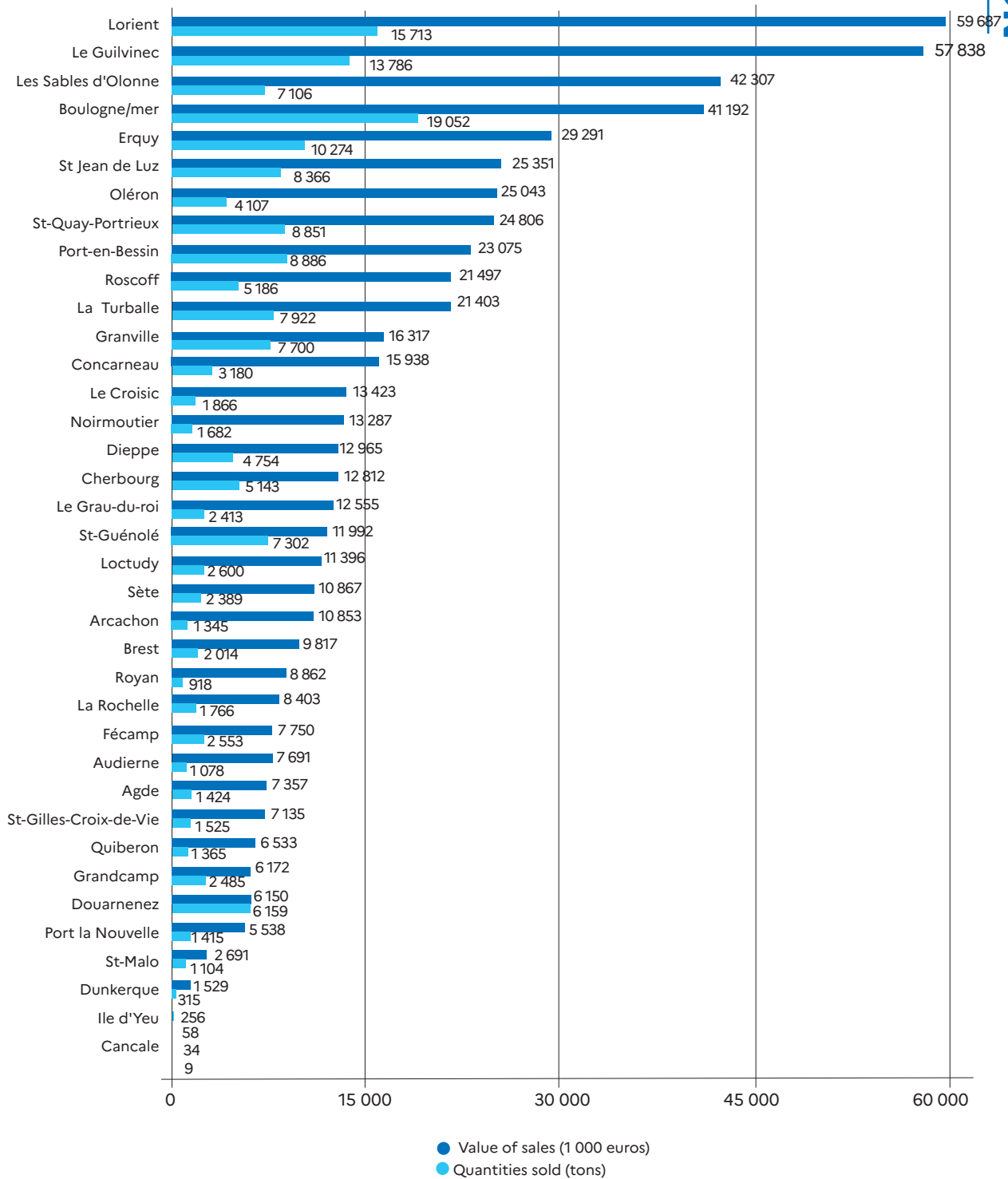


# • Sales of fishery products



**PRODUCTION**

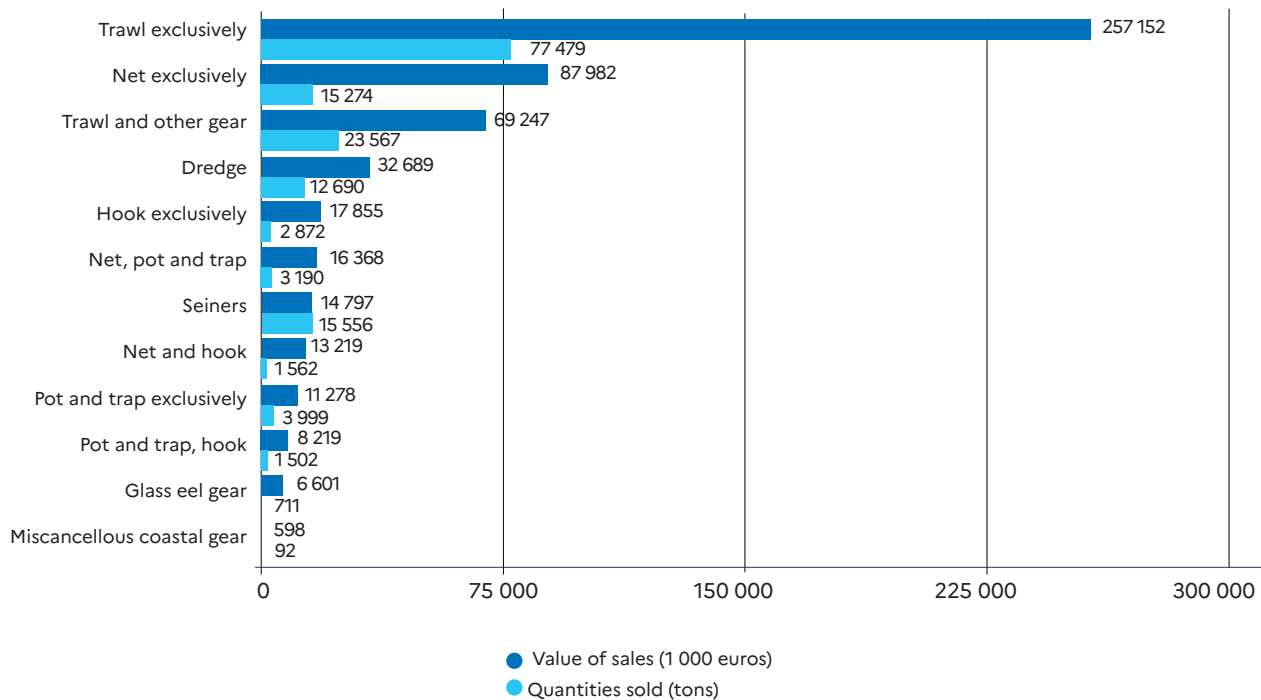
## Quantities sold and value of sales by french vessels at auctions in 2019



Source : VISIOMer / FranceAgriMer

## • Sales of fishery products

### Breakdown of quantities sold and value of sales at auction in 2019 by fleet segment <sup>(1)</sup> <sup>(2)</sup> <sup>(3)</sup>



### Number of vessels (sales at auction in 2019) <sup>(1)</sup> <sup>(2)</sup> <sup>(3)</sup>

Trawl and other gear	438
Trawl exclusively	403
Net exclusively	317
Dredge	273
Net, pot and trap	270
Pot and trap exclusively	205
Hook exclusively	171
Seiners	103
Net and hook	94
Pot and trap, hook	93
Glass eel gear	90
Miscellaneous coastal gear	89
<b>Total</b>	<b>2 546</b>

(1) Breakdown by fleet segment based on main gear used by vessels according to the 2019 Ifremer SIH survey - (2) Excluding Mediterranean sea - (3) Unspecified and inactive are not considered

Sources : FranceAgriMer, Ifremer

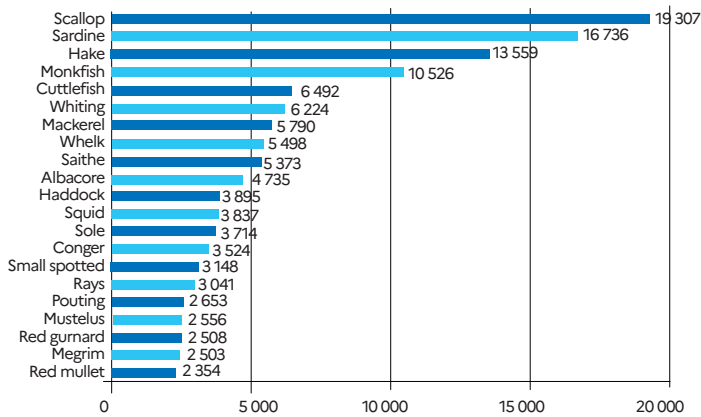
# Sales of fishery products



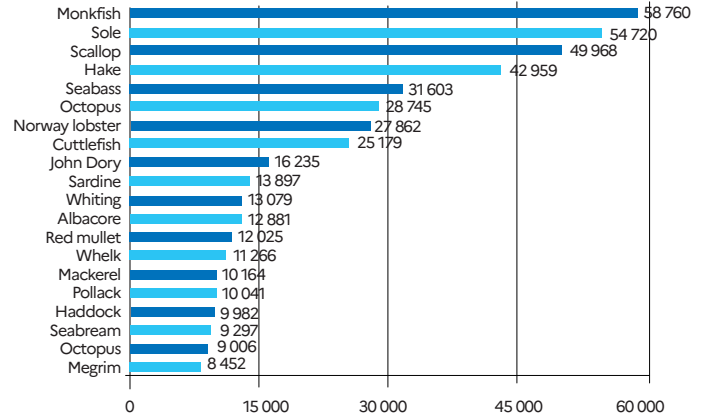
PRODUCTION

## Main species sold at auction by french vessels in 2019

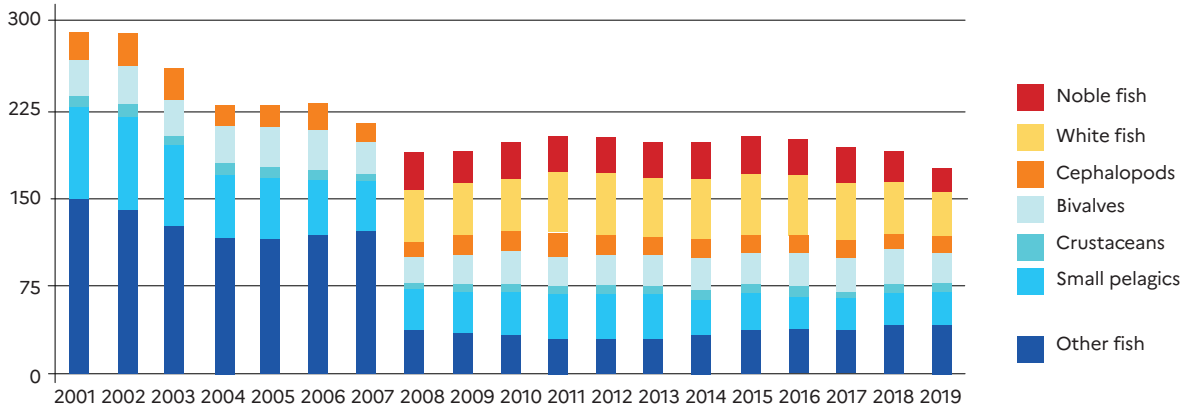
Quantities sold (in tons)



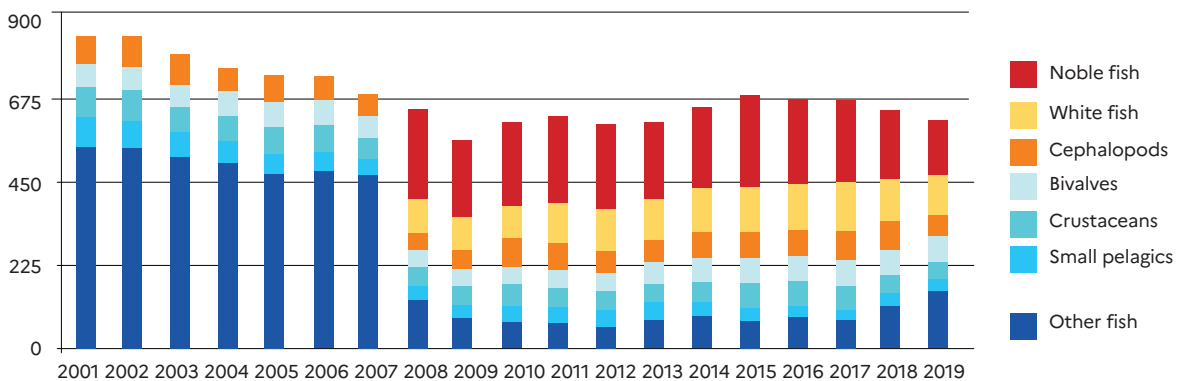
Value of sales (1 000 euros)



Changes in quantities sold by the french vessels by species group (1 000 tons)



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

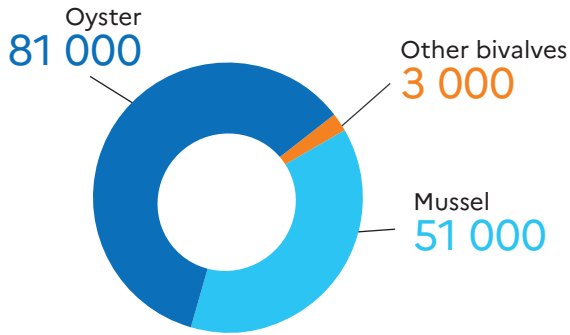


Source : VISIOMer - FranceAgriMer

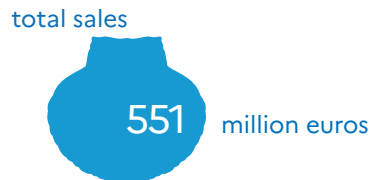
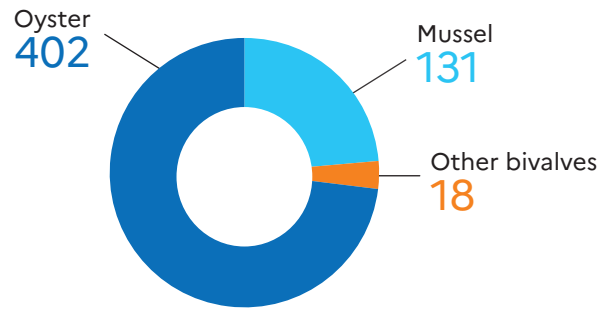
# • Sales of aquaculture products in metropolitan France

## Shellfish farming 2017

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

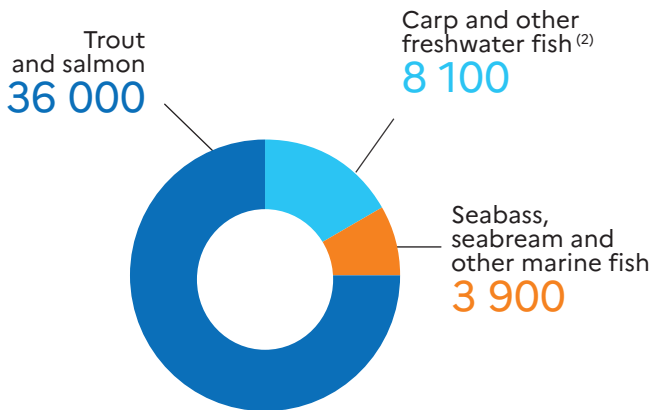


Value of sales (million euros)

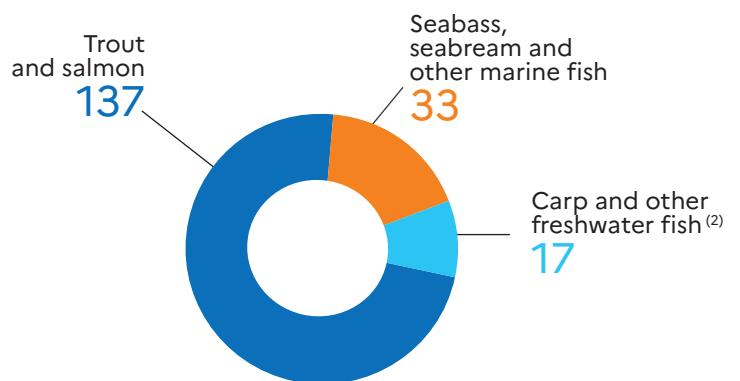


## Fish farming 2017

Quantities sold for consumption (in tons)<sup>(1) (2)</sup>



Value of sales (million euros)



(1) Equivalent live weight - (2) Including farmed crustaceans

Source : : DPMA Agreste data - Annual survey from SSP 2019

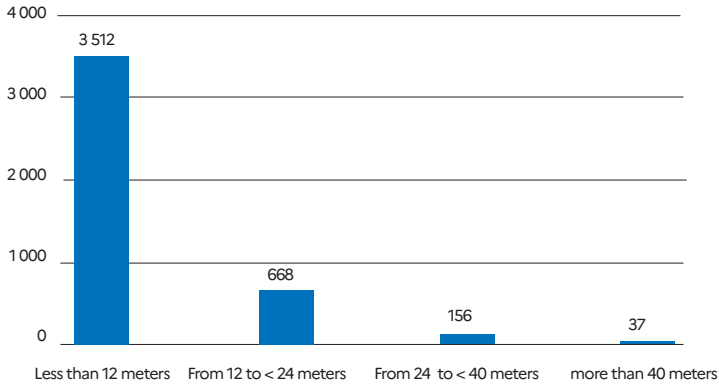
# Fishing fleet



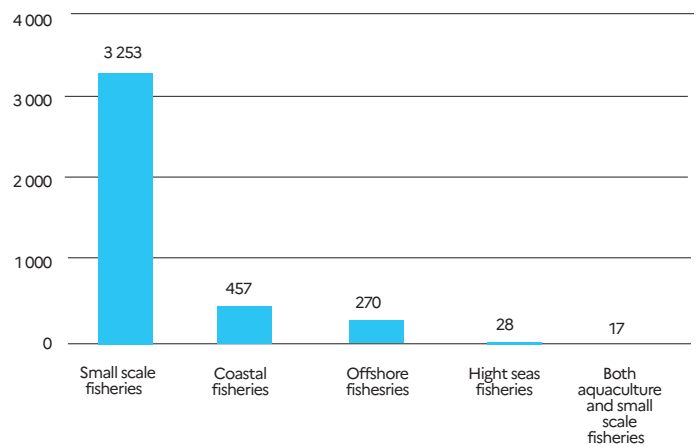
PRODUCTION

## Fishing fleet

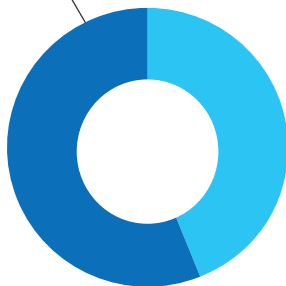
Breakdown of total vessels by length in 2018 (metropolitan France)



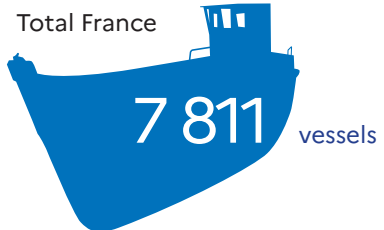
Breakdown of total vessels by fishery category in 2014 (metropolitan France) <sup>(1)</sup>



Metropolitan France  
4 373



Overseas territories  
3 438



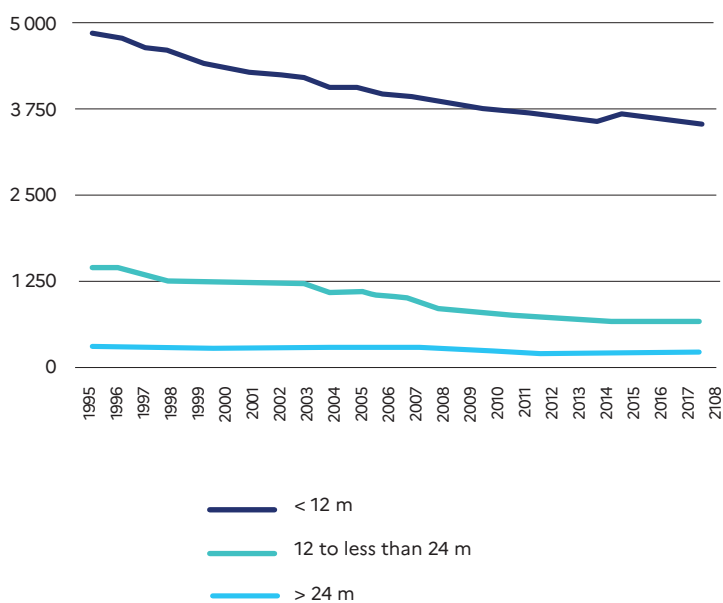
- **Small scale fisheries**  
out of port for less than 24 hours
- **Coastal fisheries**  
between 24 hours and 96 hours out of port
- **Offshore fisheries**  
more than 96 hours out of port
- **High seas fisheries**  
vessels over 1 000 GRT (gross register tonnage) or vessels over 150 GRT if out of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

(1) ships whose navigation type is not informed and are not taken into account. Warning: these data record vessels registered in France, including inactive vessels

Source : FREMER 2018 + study on overseas territories

## • Fishing fleet / Aquaculture firms

Changes in the number of fishing vessels in metropolitan France



Source : fleet file from IFREMER 2018

	moins de 12 m	12 à moins de 24 m	24 m et plus
1995	4 878	1 434	281
1996	4 795	1 395	285
1997	4 656	1 318	279
1998	4 583	1 258	277
1999	4 461	1 239	271
2000	4 380	1 233	270
2001	4 271	1 201	272
2002	4 256	1 179	275
2003	4 209	1 155	277
2004	4 069	1 068	274
2005	4 034	1 057	269
2006	3 967	1 006	259
2007	3 939	991	257
2008	3 862	876	241
2009	3 815	817	225
2010	3 769	773	209
2011	3 747	721	207
2012	3 645	741	192
2013	3 621	724	192
2014	3 580	704	188
2015	3 665	683	185
2016	3 603	697	186
2017	3 562	670	185
2018	3 512	668	193

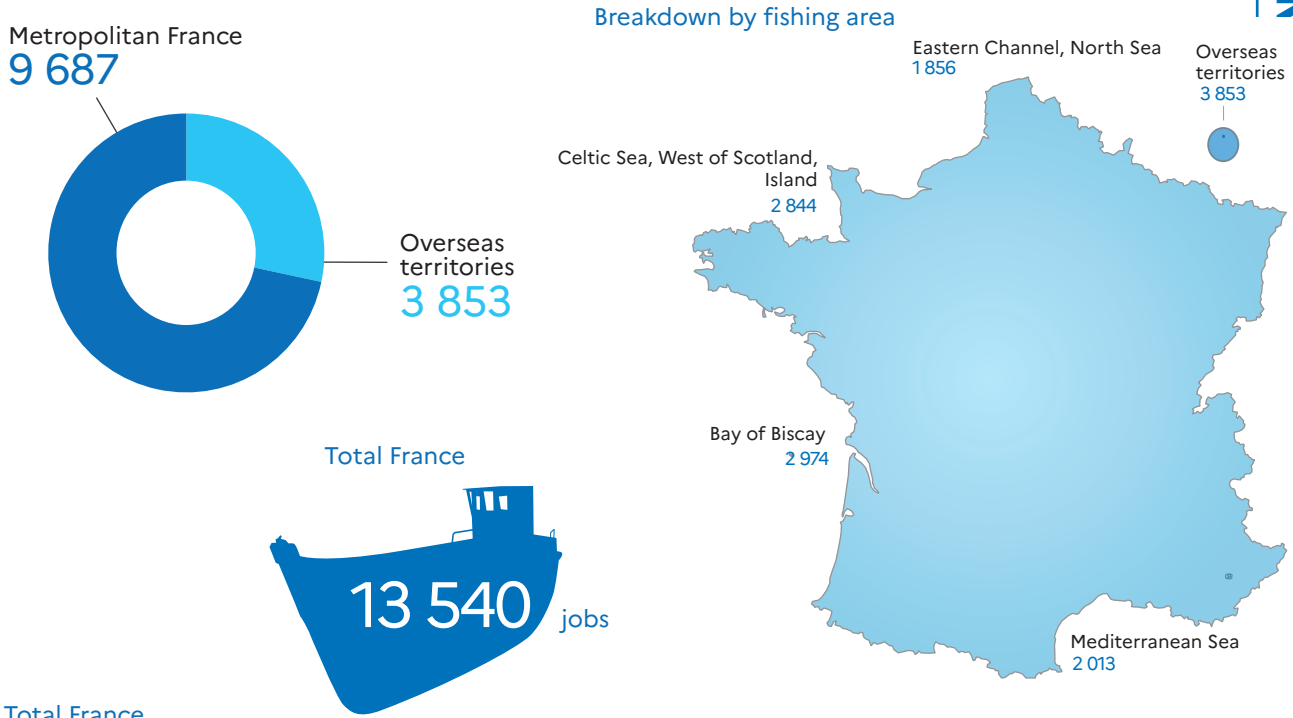
## Aquaculture firms

Shellfish farming - including seaweed and shrimps	2 645
Marine fish farming and sturgeon	22
Continental salmonids farming	366

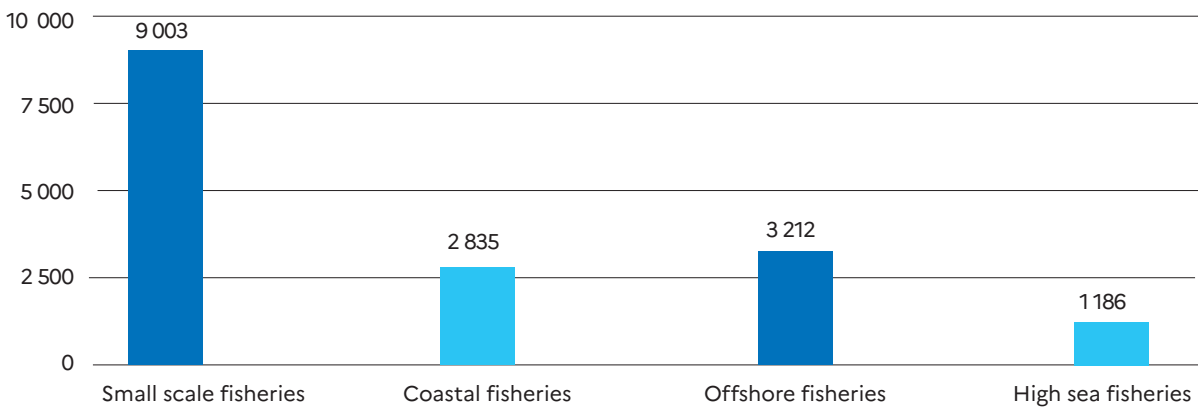
Source : DPMA Agreste data - Annual survey from SSP 2019

## Jobs

Number of seamen employed on board french fishing vessels in 2017 (seamen of all nationalities)



Total France



## Number of full time equivalent jobs in 2017

	Jobs	FTEJ
Shellfish farming	14 900	9 500
Fish farming	2 600	2 000

Source : DPMA – Data Collection Framework (DCF)



---

# FIRMS

---

FISHMONGERS / TRADING / PROCESSING

By sales / By region





# • Fishmonger firms



FIRMS

## Fishmonger's in 2016

Number of establishments



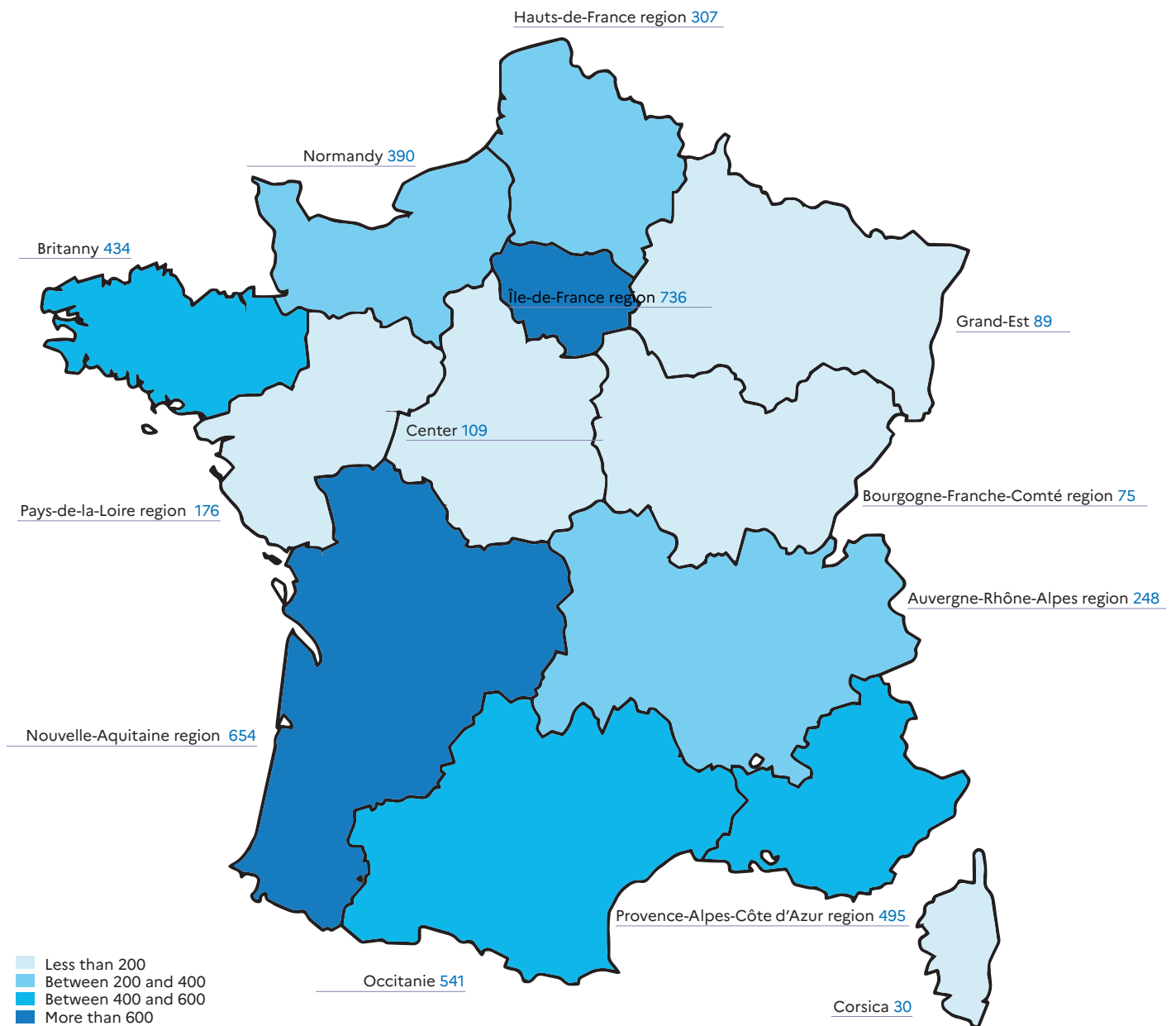
Hand sales



Full time equivalent jobs



Number of establishments per region



Source : ViaAqua and Protéis for FranceAgriMer

# • Trading firms

## Trading firms in 2016

Number of firms



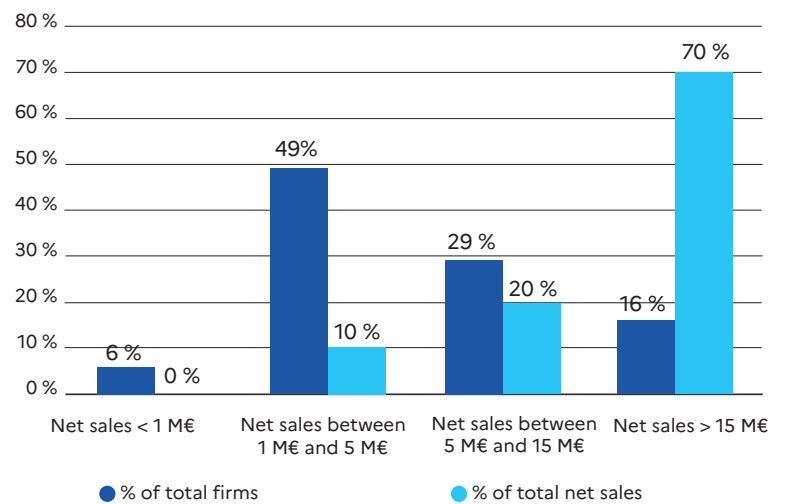
Jobs <sup>(1)</sup>



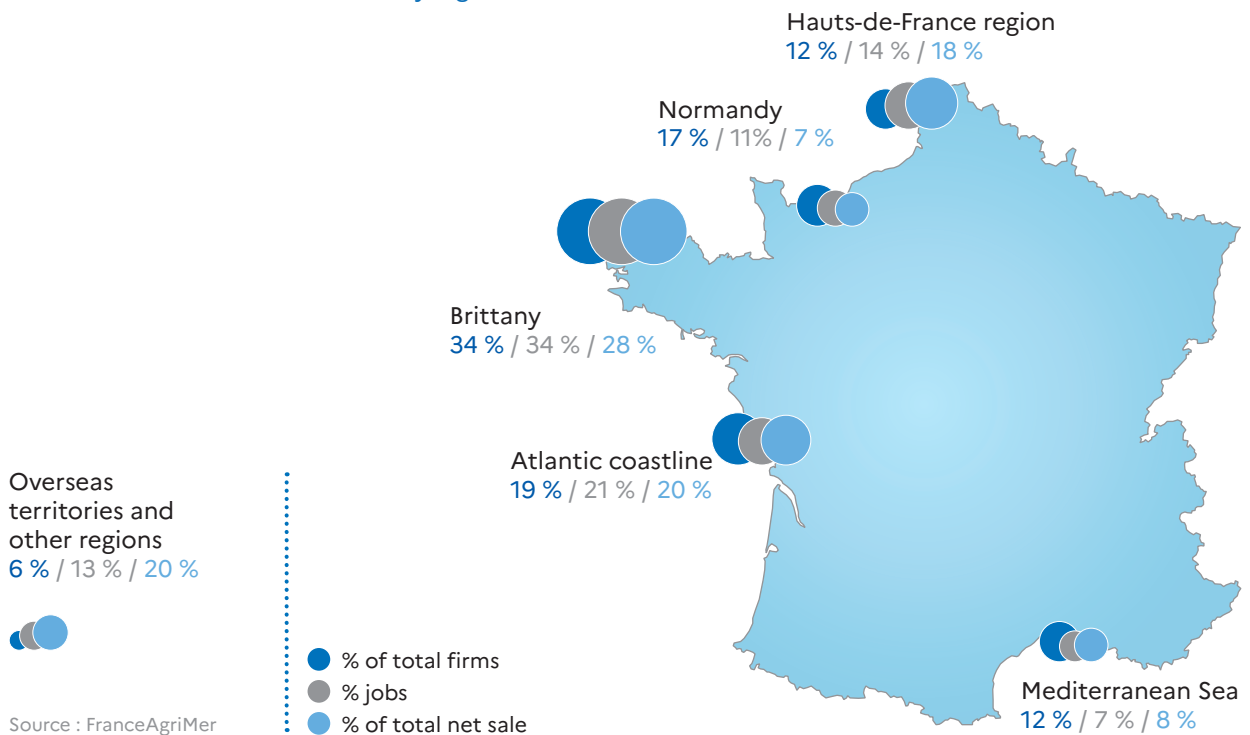
Net sales (million euros) <sup>(1)</sup>



Breakdown of firms by total net sales



Breakdown of firms and total net sales by region



(1) Data 2014 or 2015

# Processing main activity firms



FIRMS

## Processing main activity firms in 2018

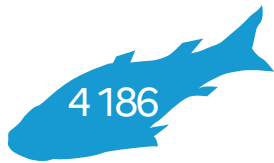
Number of firms



Net sales per firm (million euros) <sup>(1)</sup>



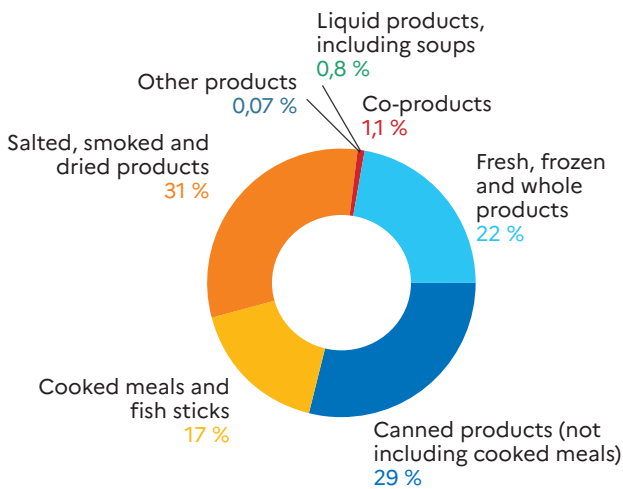
including seafood and fish farming processing



Jobs

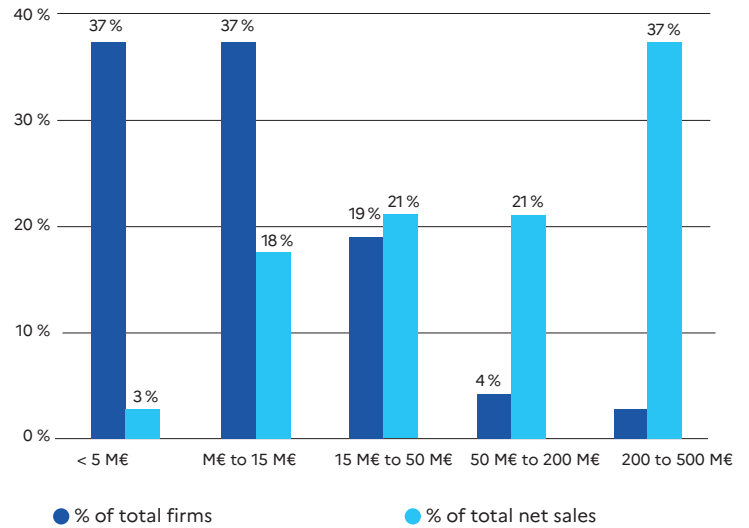


Seafood processing net sales <sup>(3)</sup>

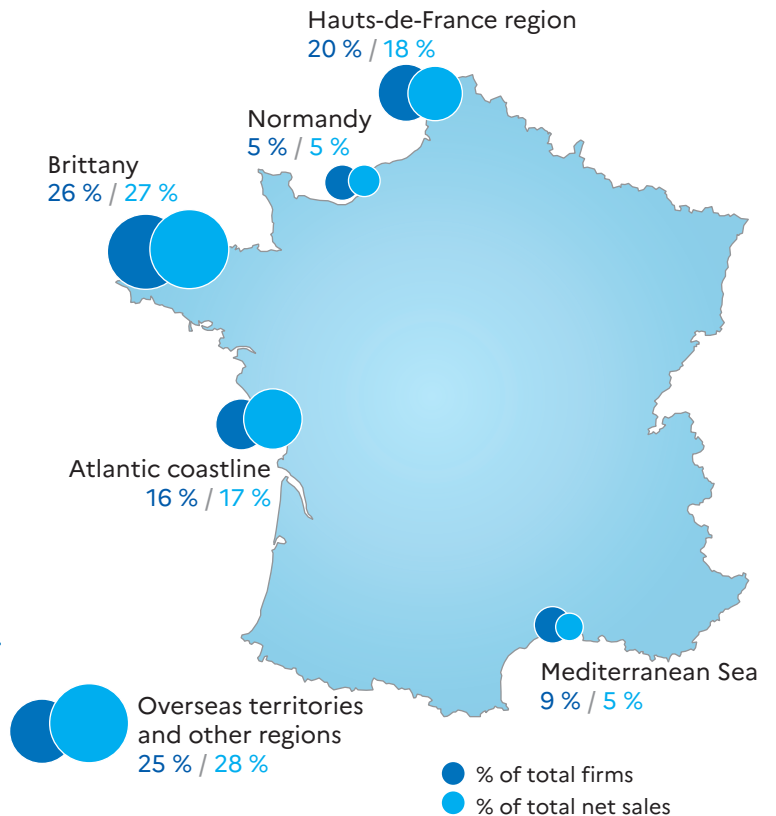


(1) Filleting, cutting, peeling, packaging, surgelation  
 (2) Seaweeds, in fish products, others  
 (3) Small sample estimation

Breakdown of firms by total net sales <sup>(3)</sup>



Breakdown of processing firms and sales by region



Source : FranceAgriMer



---

# TRADE

---

## IMPORTS / EXPORTS

By presentation / By species / By geographical origine / Main species



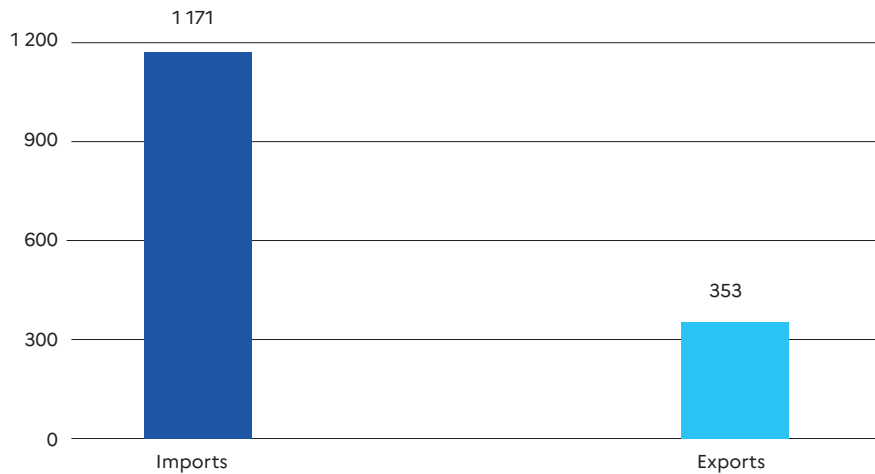
# • Supply balance



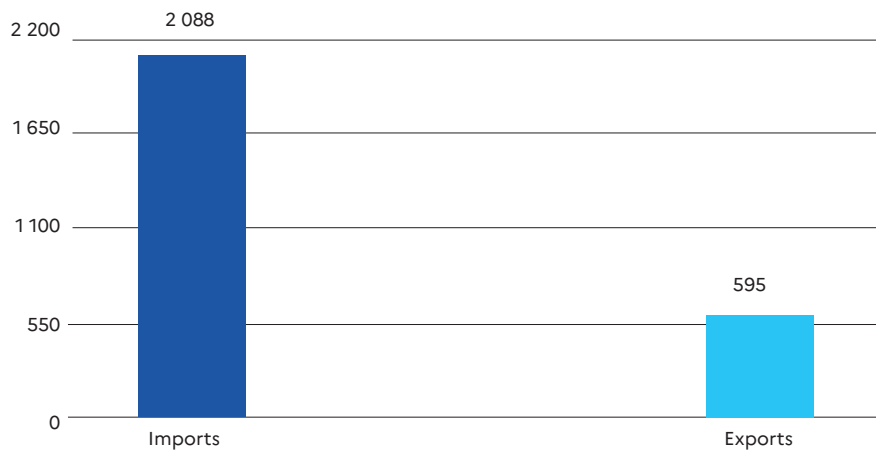
TRADE

## Supply balance in 2019

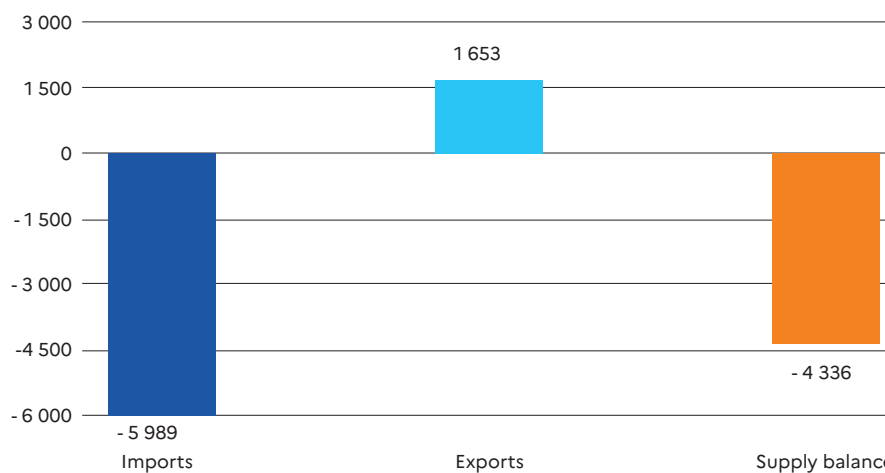
Net weight (1 000 tons)



Live weight (1 000 tons)



Value (million euros)

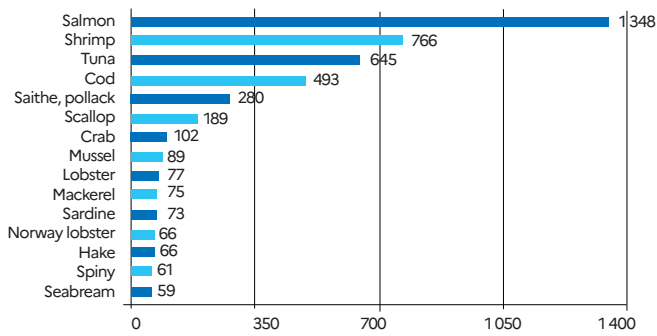


Source : French customs

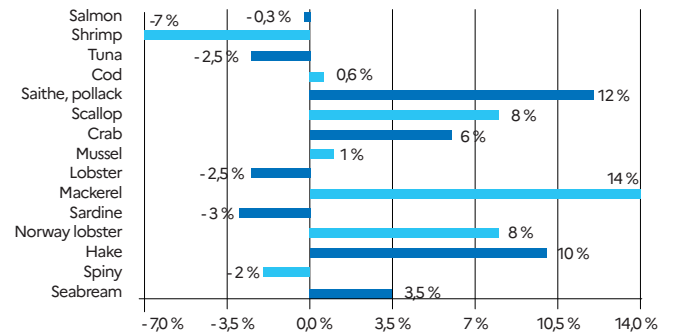
# Imports and exports / metropolitan France and overseas territories

## Imports - main species in 2019

Value (million euros)

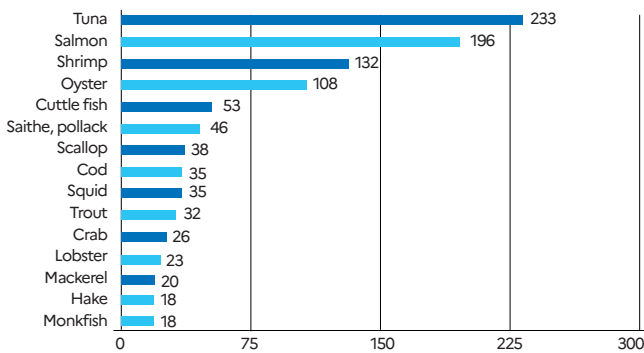


Evolution 2019/18 (en %)

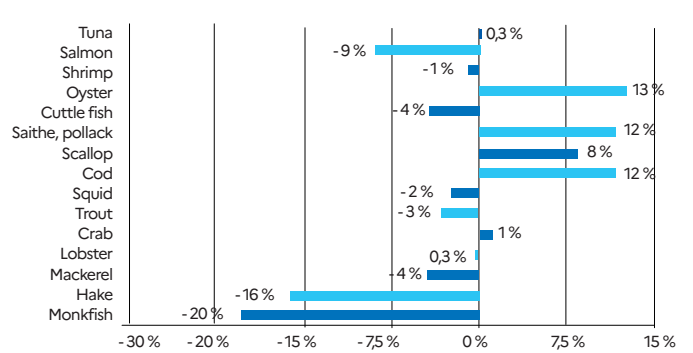


## Exports - main species in 2019

Value (million euros)



Evolution 2019/18 (en %)



Source : French customs

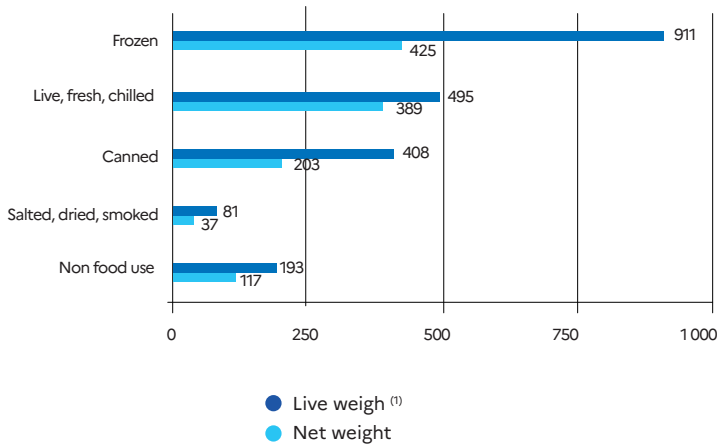
# Imports and exports / metropolitan France and overseas territories



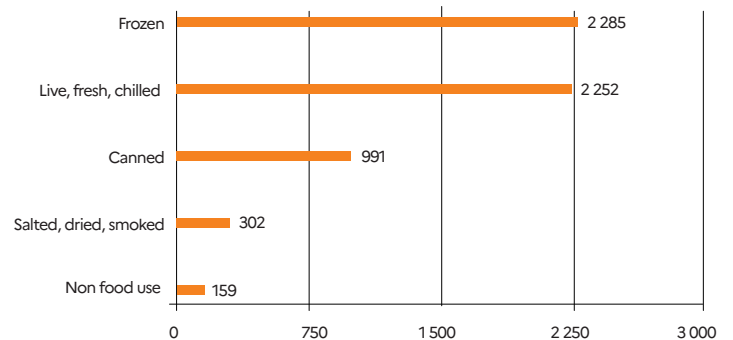
TRADE

## Imports by presentation in 2019

Imports by volume (1 000 tons)

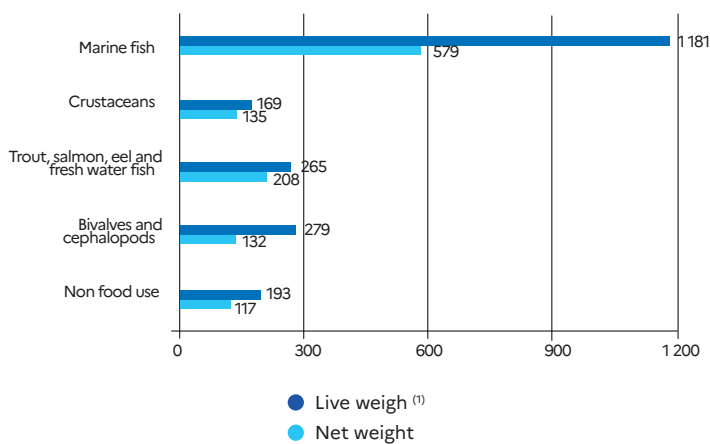


Imports by value (millions euros)

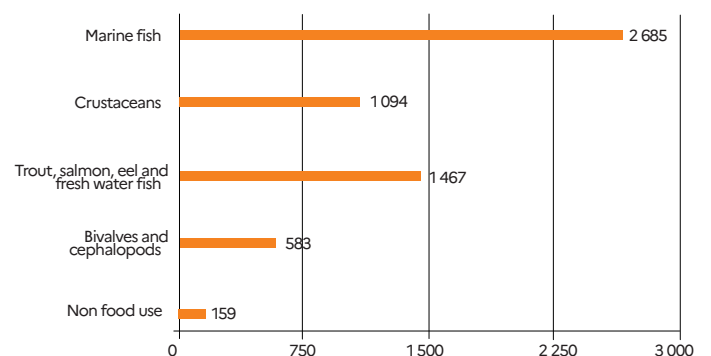


## Imports by species group in 2019

Imports by volume (1 000 tons)



Imports by value (millions euros)



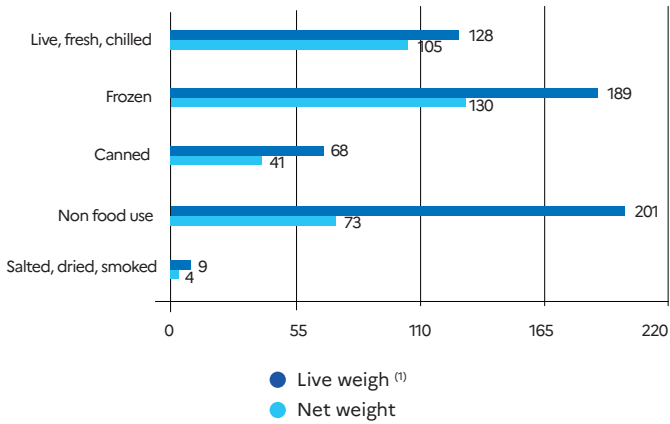
(1) Data collection methodology is detailed on inside back cover

Source : French customs

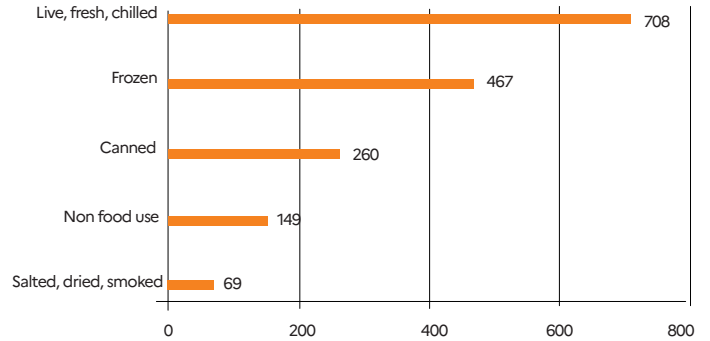
# Imports and exports / metropolitan France and overseas territories

## Exports by presentation in 2019

Exports by volume (1 000 tons)

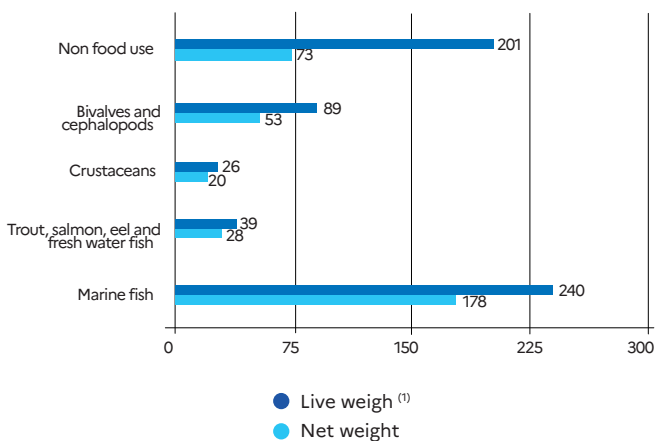


Exports by value (millions euros)

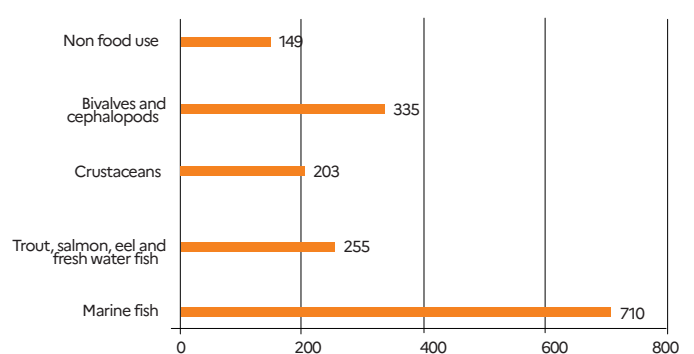


## Exports by species group in 2019

Exports by volume (1 000 tons)



Exports by value (millions euros)



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

Source : French customs



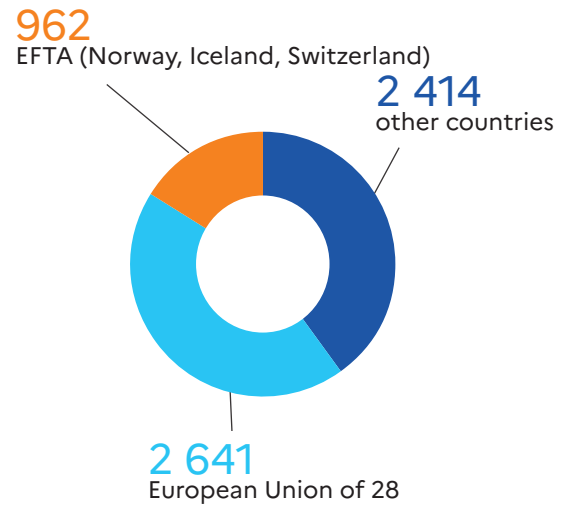
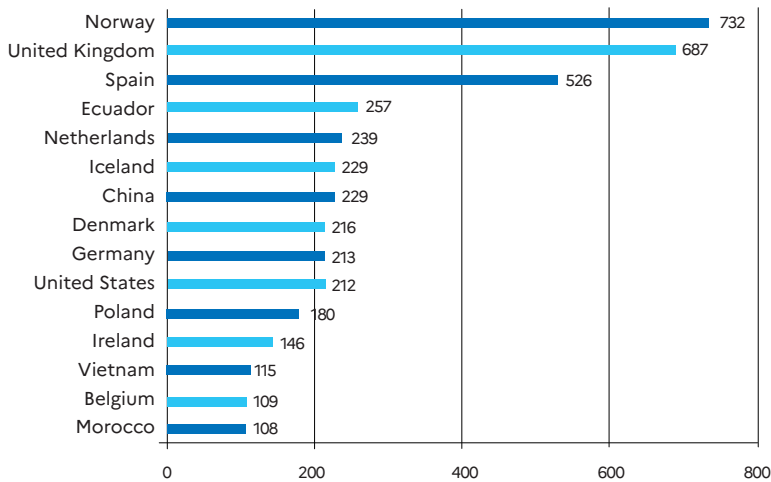
# Imports and exports / metropolitan France and overseas territories



TRADE

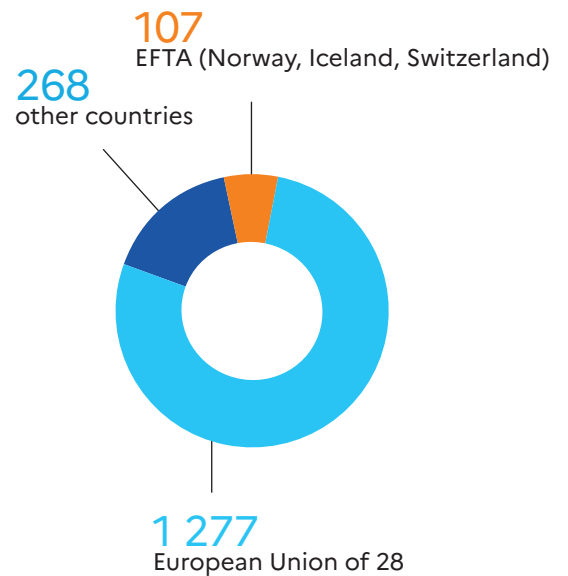
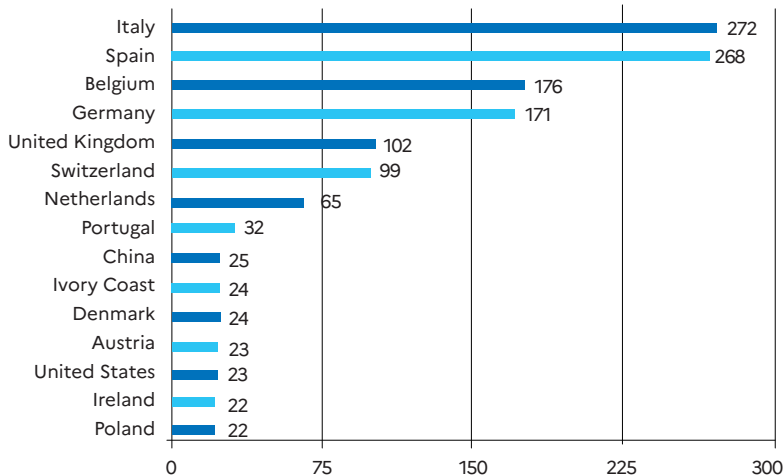
## Imports of aquatic products by geographical origin in 2019

Value (millions euros)



## Exports of aquatic products by destination in 2019

Value (millions euros)



Source : French customs



---

# CONSUMPTION

---

## SUPPLY BALANCE / PURCHASES

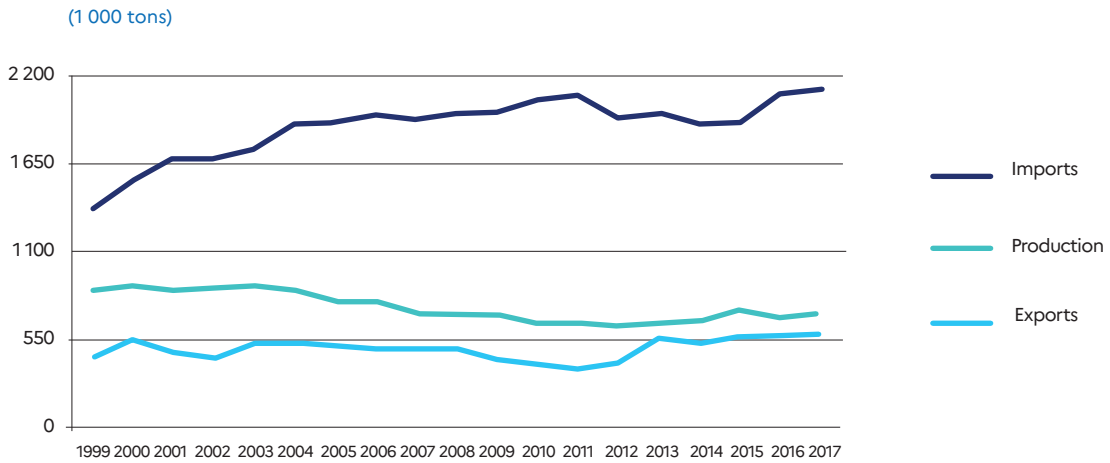
Households / Catering / Breakdown of purchases by distribution channel



# • Supply balance

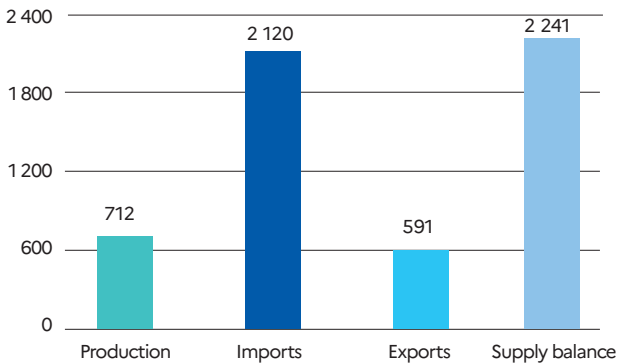


Balance changes in production, imports, and exports (1) (2)

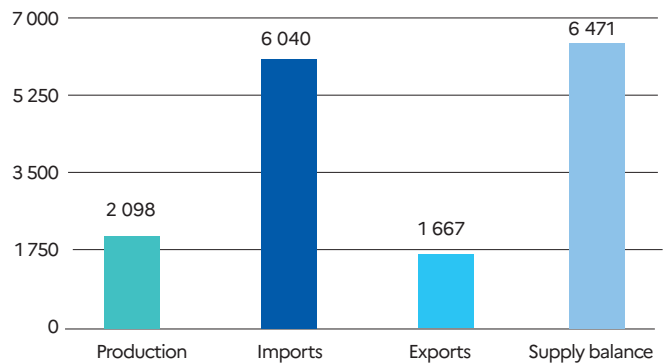


## Supply balance in 2017

In volume (1 000 tons)



In value (millions euros)

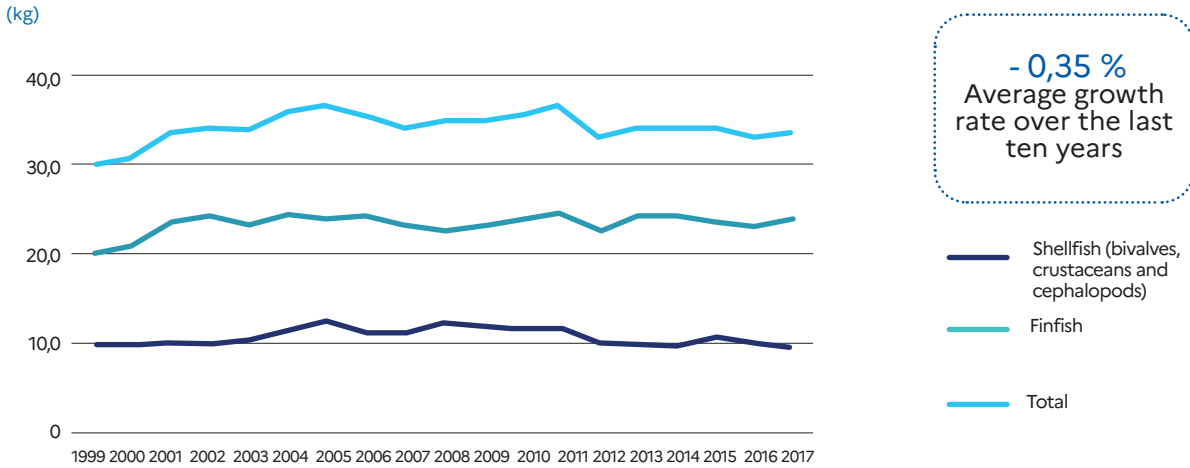


(1) Data collection methodology is detailed on inside back cover - (2) Live weight

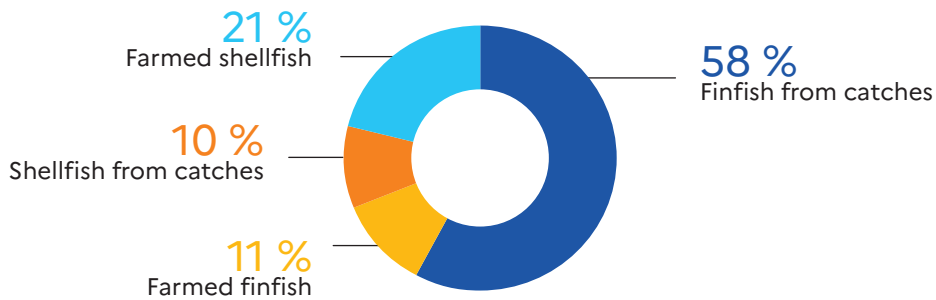
Source: FranceAgriMer

# • Supply balance

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

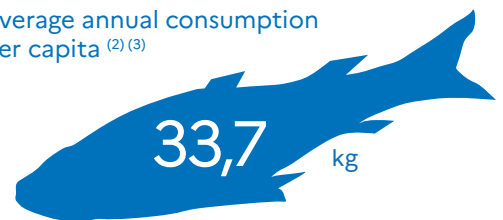


## Breakdown by products in 2015 <sup>(1) (2)</sup>



Average annual consumption per capita <sup>(2) (3)</sup> (kg)	33,7
<b>Fish farming</b>	3,8
Salmon	2,7
<b>Farmed shellfish and finfish</b>	
Mussel	2,4
Oyster	1,1
Shrimp	1,9
<b>Finfish and shellfish from catches</b>	
Scallop	1,2
<b>Fish from catches</b>	20,2
Tuna	3,9
Cod	2,8
Alaska pollock	2,3
Sardine	1,0
Hake	1,2
Herring	0,7
Mackerel	0,9
Saithe	0,7
Monkfish	0,4

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



(1) Data collection methodology is detailed on inside back cover - (2) Equivalent live weight - (3) estimation for 2017

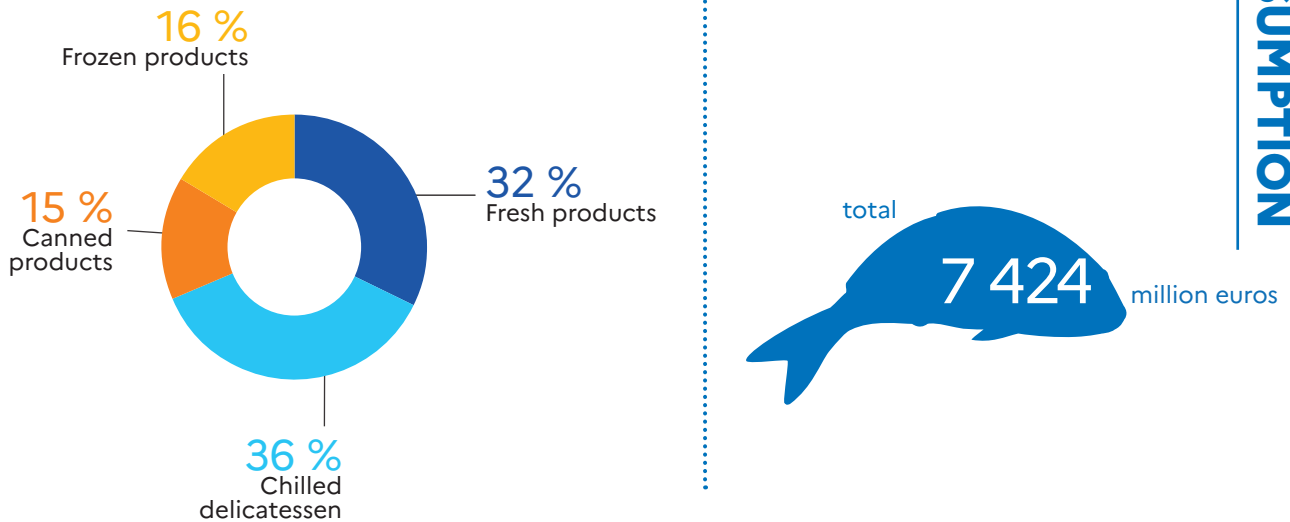
Source : FranceAgriMer, Kantar Worldpanel, Eumofa

## Households purchases

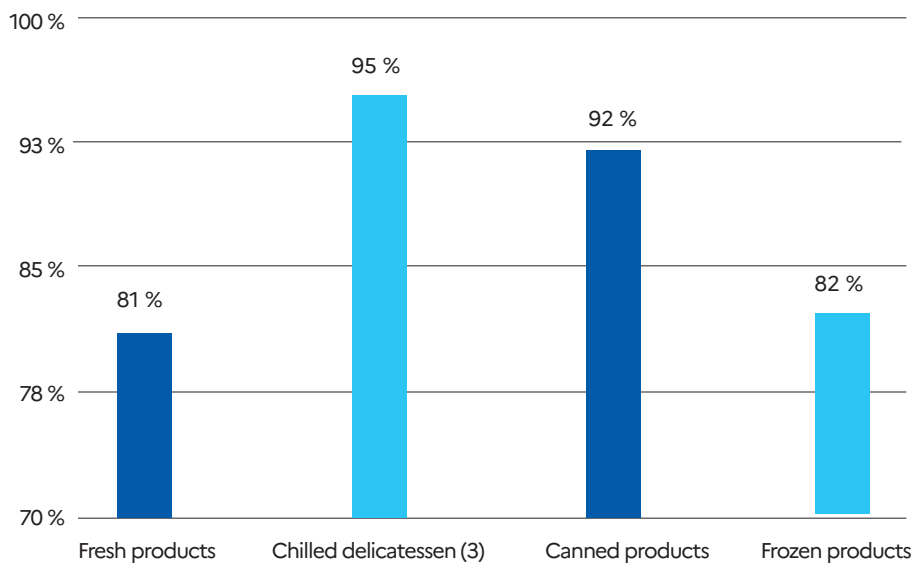


CONSUMPTION

### Households spending for aquatic products in 2019 <sup>(1)</sup>



### Percentage of purchasing households in 2019 <sup>(2)</sup>



### Households consumption over 10 years

	2010		2019		Évolution	
	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes	Values
Fresh products	244 447	2 349 508	205 785	2 379 078	-16 %	1 %
Frozen products	158 130	1 483 272	111 522	1 212 238	-29 %	-18 %
Canned products	114 345	947 738	121 129	1 141 295	6 %	20 %
Chilled delicatessen	180 599	2 114 344	190 327	2 691 779	5 %	27 %

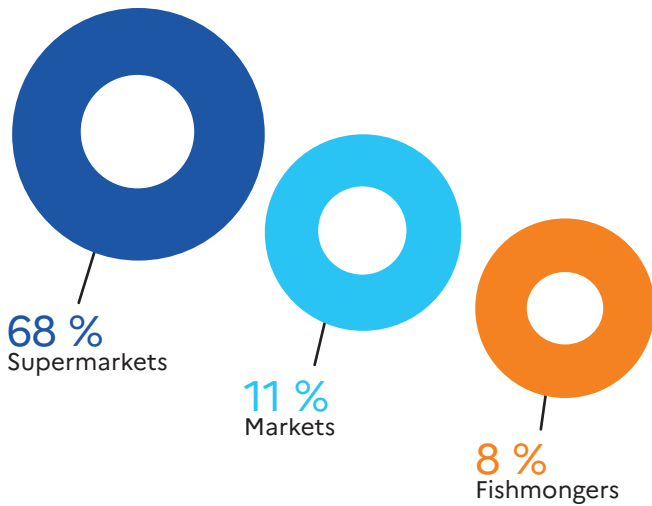
(1) Data collection methodology is detailed on inside back cover - (2) A purchasing households buys the product at least once a year

Source : FranceAgriMer from Kantar Worldpanel

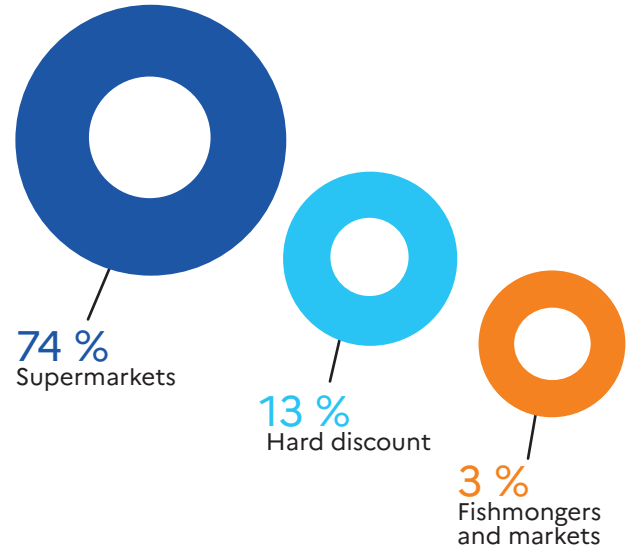
## • Households purchases

### Purchases of aquatic products by french households for home consumption in 2019 <sup>(1)</sup>

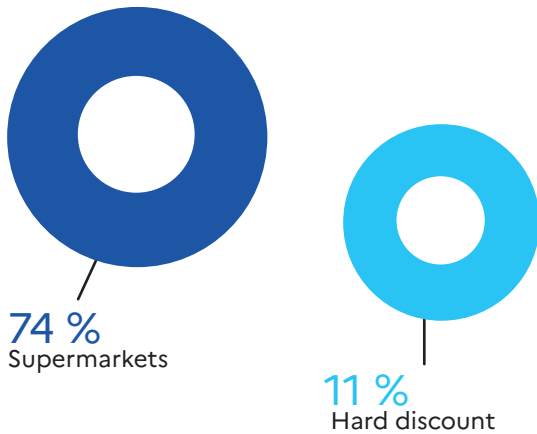
#### Fresh products



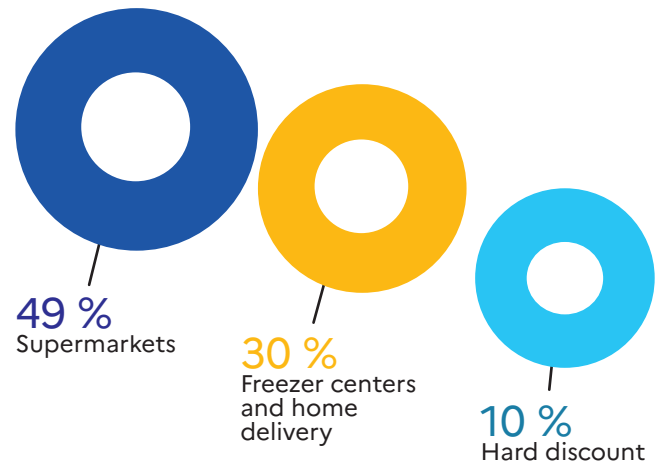
#### Chilled delicatessen



#### Canned products



#### Frozen products



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

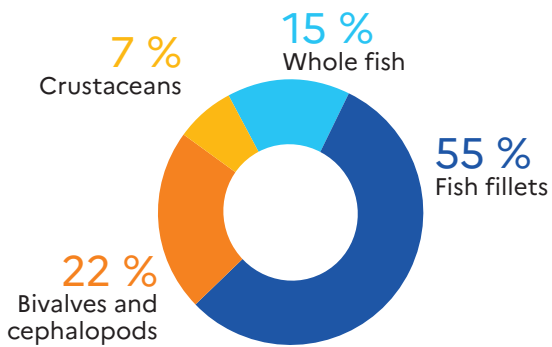
Source : FranceAgriMer from Kantar Worldpanel

# Households purchases

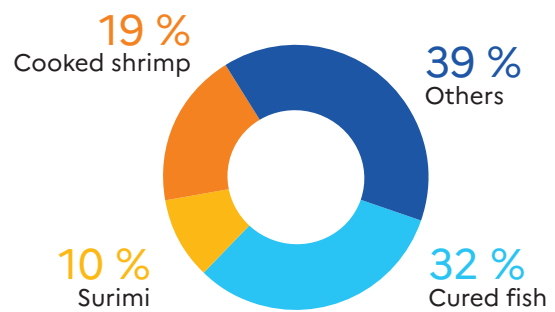


## Breakdown of expenditures by presentation and species group in 2019 <sup>(1)</sup>

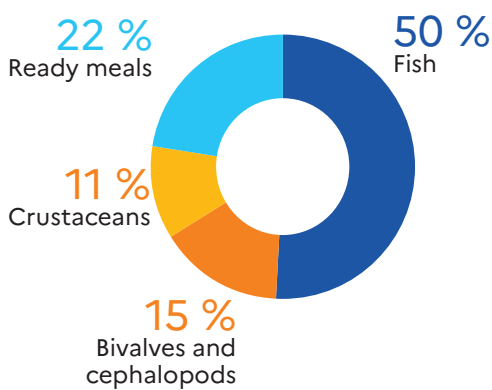
Fresh products



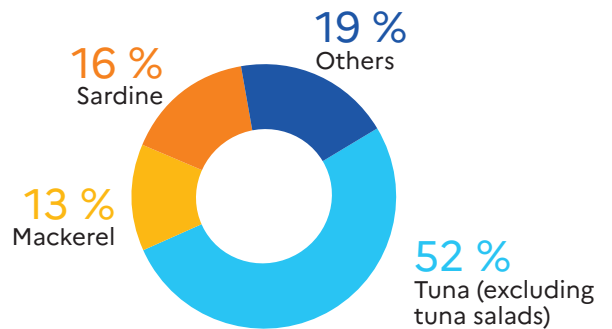
Chilled delicatessen



Frozen products



Canned products



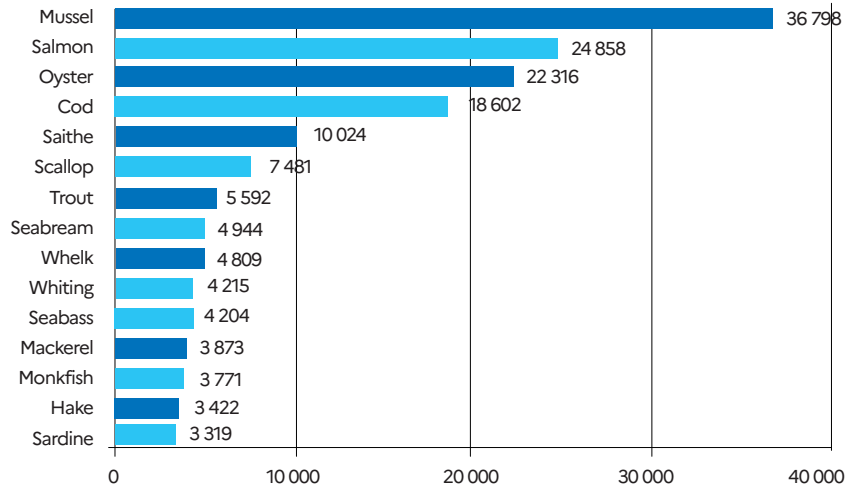
(1) Data collection methodology is detailed on inside back cover

Source : FranceAgriMer from Kantar Worldpanel

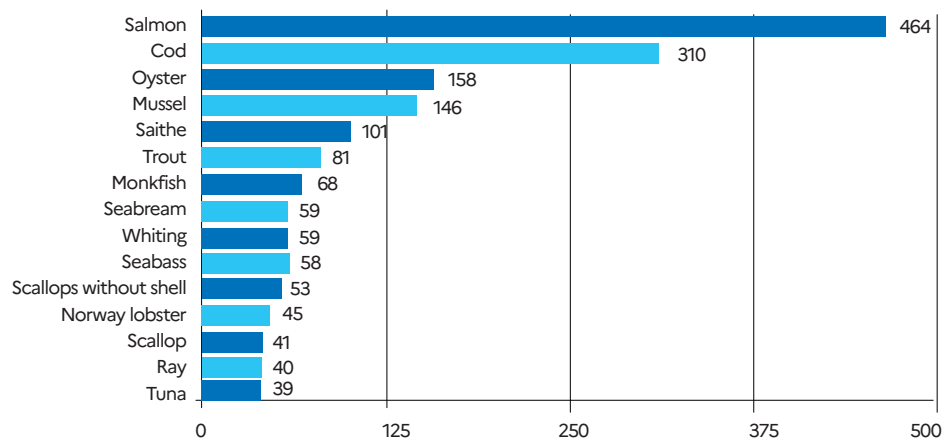
# Households purchases

## Main species purchased fresh in 2019 <sup>(1)</sup>

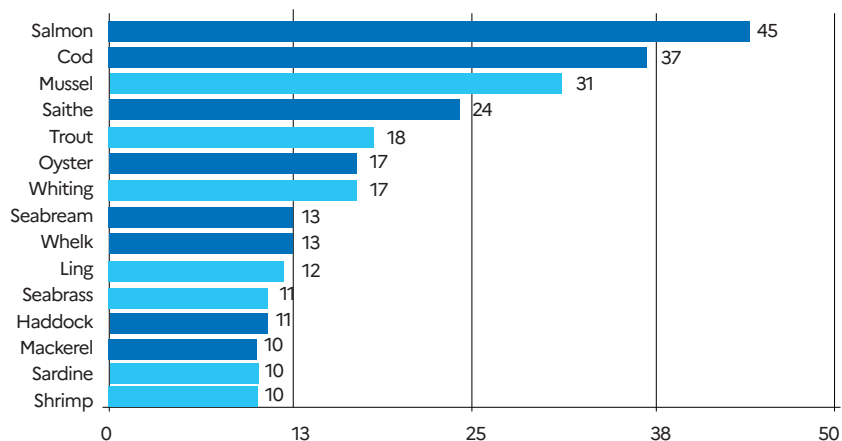
Tons <sup>(2)</sup>



Million euros



Percentage of purchasing households (%)



(1) Data collection methodology is detailed on inside back cover - (2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

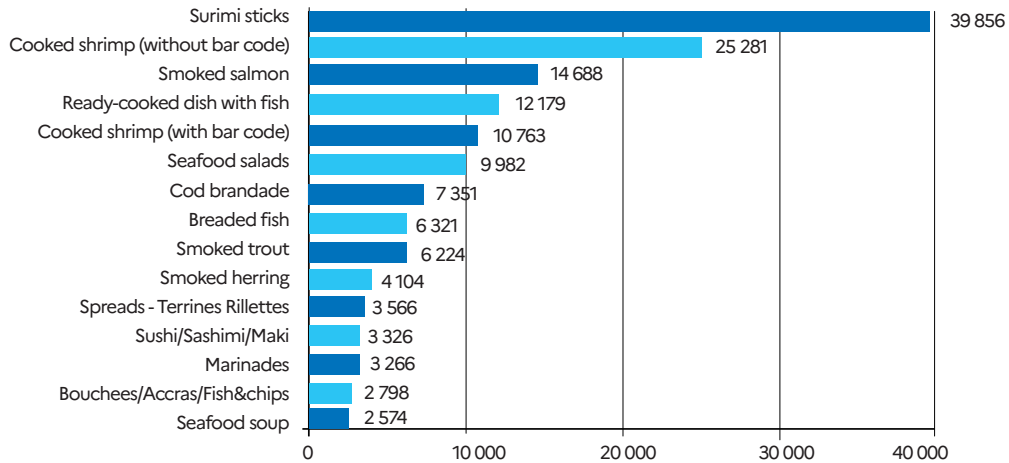


# Households purchases

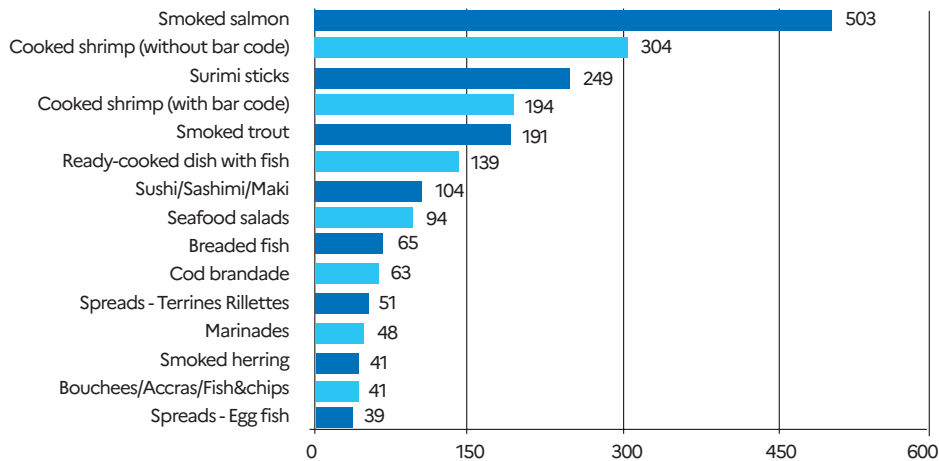


## Main products purchased for chilled delicatessen in 2019 <sup>(1)</sup>

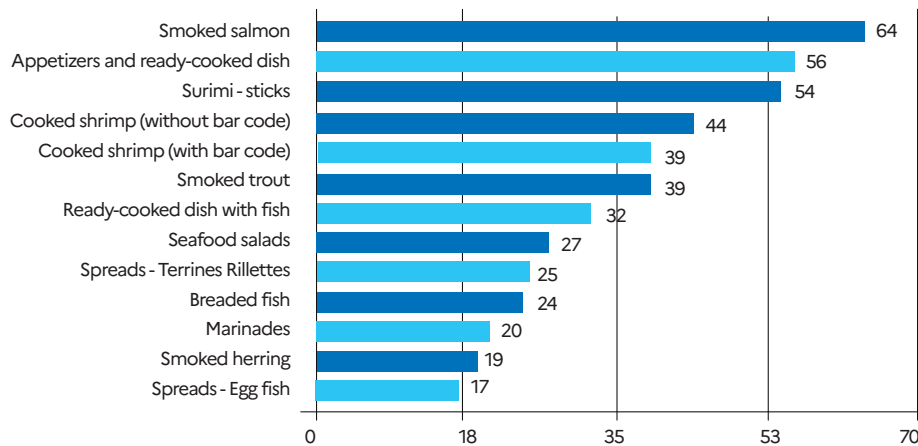
Tons <sup>(2)</sup>



Million euros



Percentage of purchasing households (%)

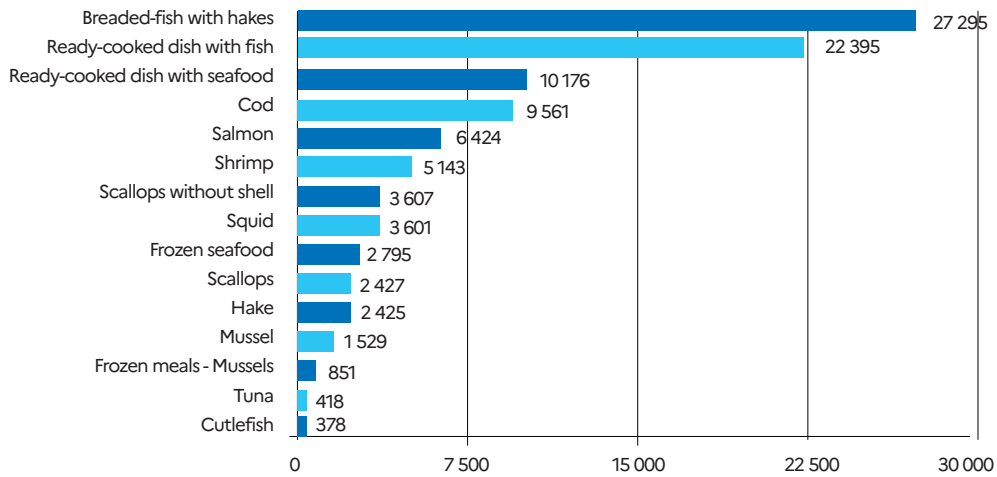


(1) Data collection methodology is detailed on inside back cover - (2) Net weight

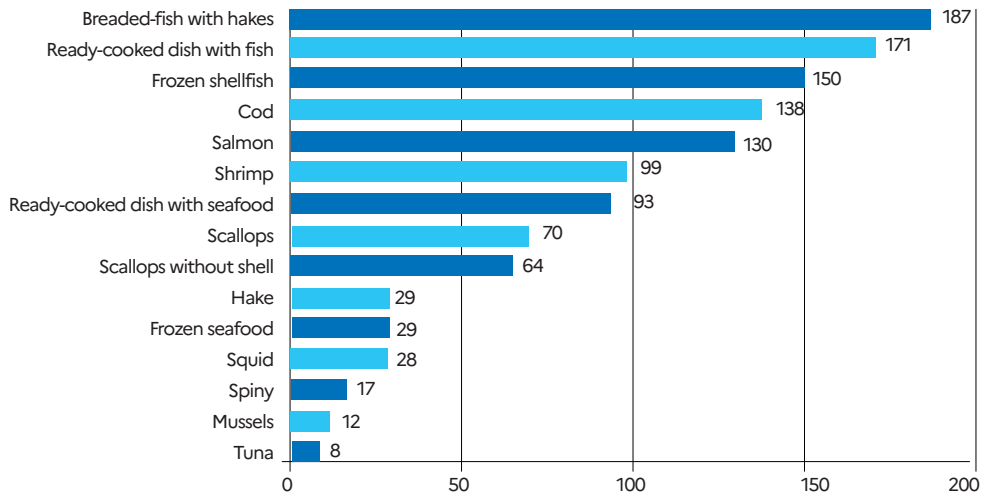
# Households purchases

## Main species purchased as frozen products in 2019 <sup>(1)</sup>

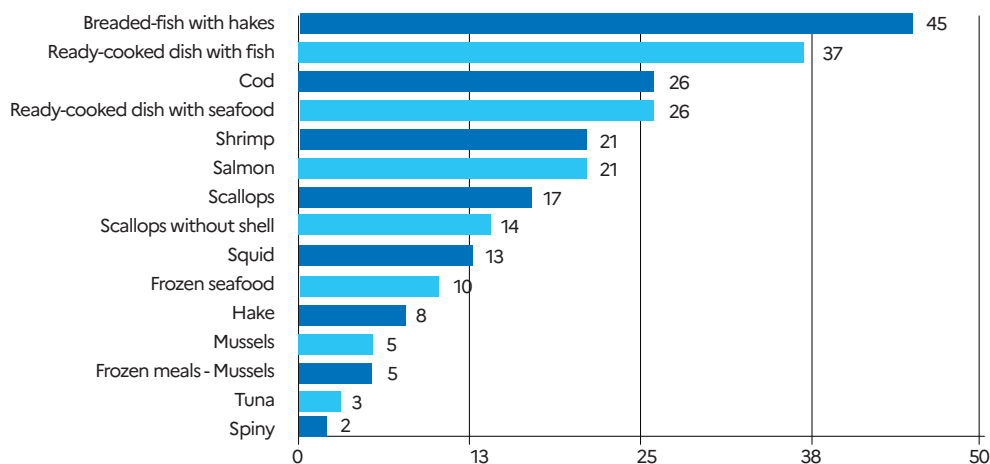
Tons <sup>(2)</sup>



Million euros



Percentage of purchasing households (%)



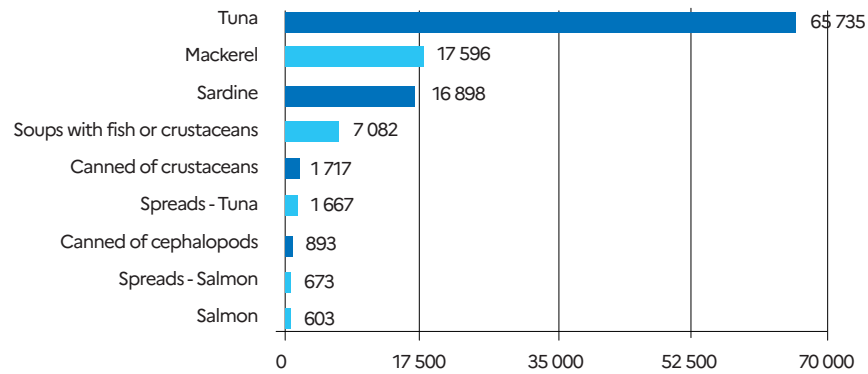
(1) Data collection methodology is detailed on inside back cover - (2) Net weight

# Households purchases

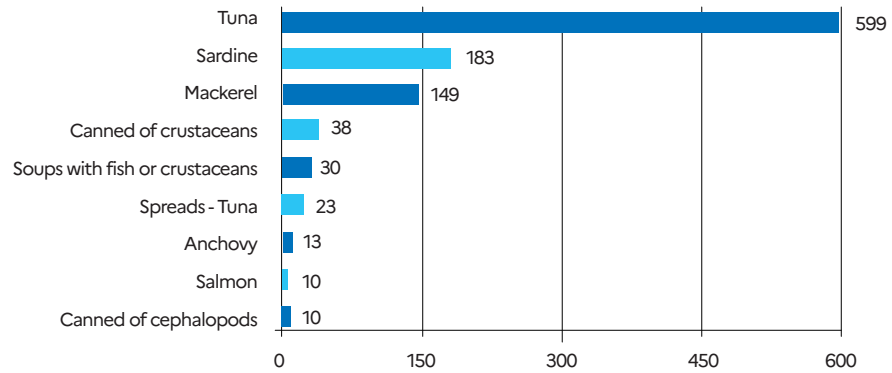


## Main species purchased in canned products in 2019 <sup>(1)</sup>

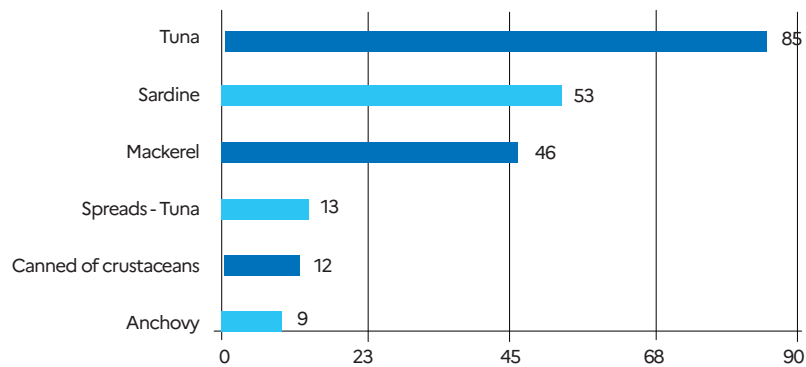
Tons <sup>(2)</sup>



Million euros



Percentage of purchasing households (%)



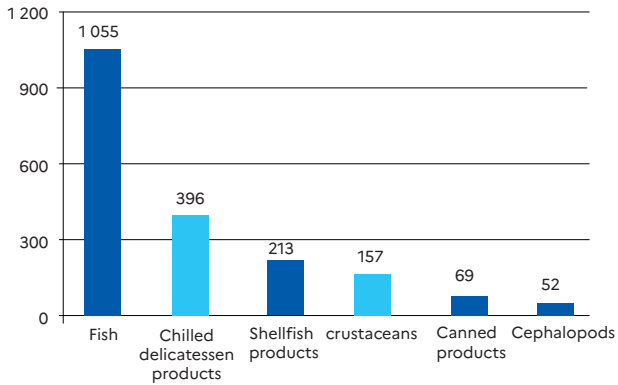
(1) Data collection methodology is detailed on inside back cover - (2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

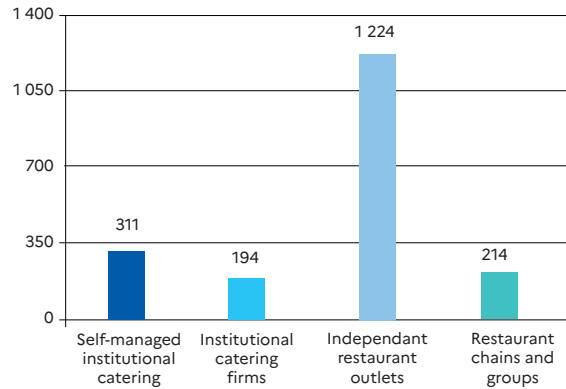
- **Catering purchases**

## Spending for the catering sector in 2017

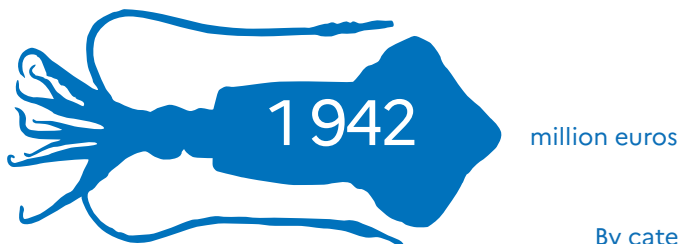
By kind of product (million euros)



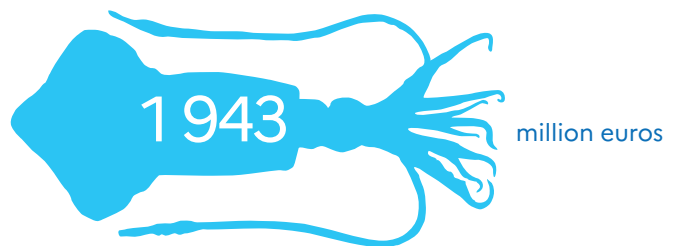
By catering outlet (million euros)



By kind of product



By catering outlet



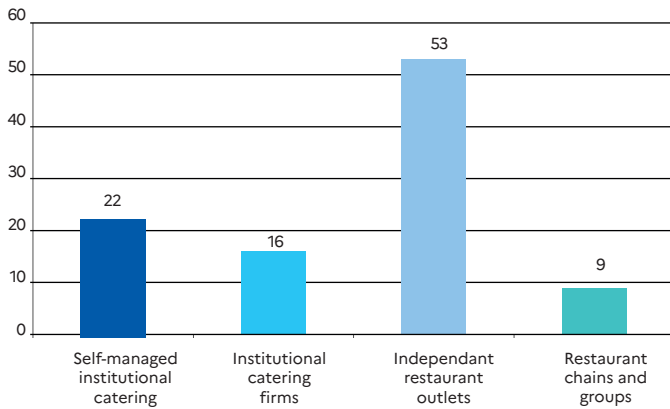
Source : FranceAgriMer from GiraFoodService

# • Catering purchases

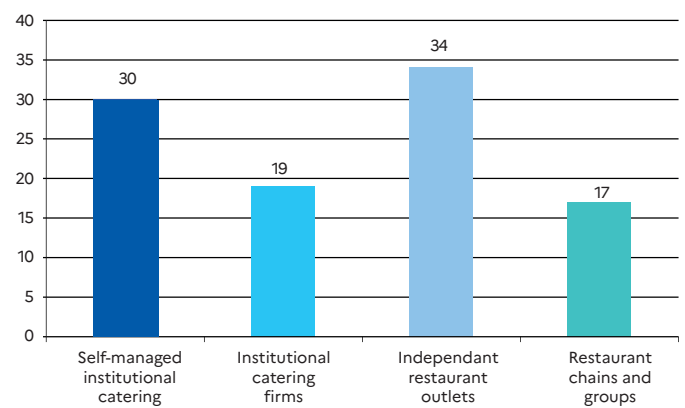


## Purchases in volume by kind of products in 2017

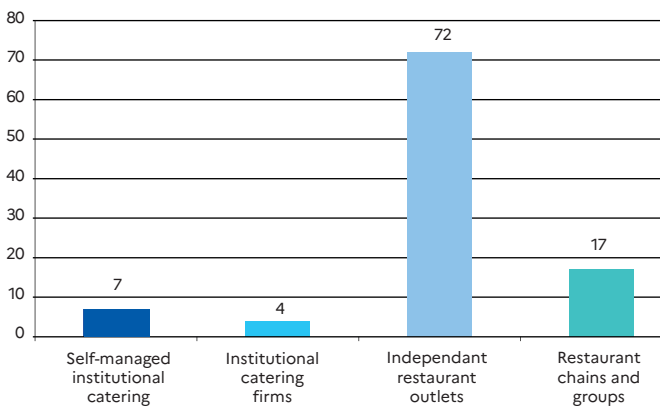
Fish products (%)



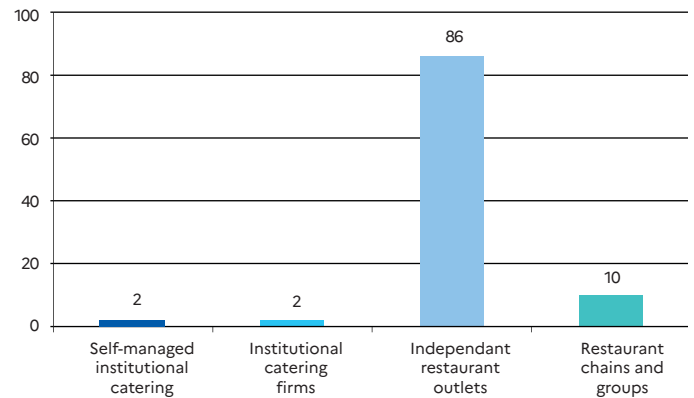
Chilled delicatessen products (%)



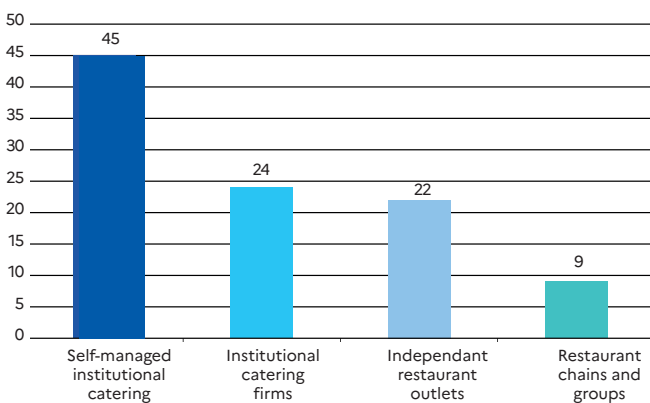
Shellfish products (%)



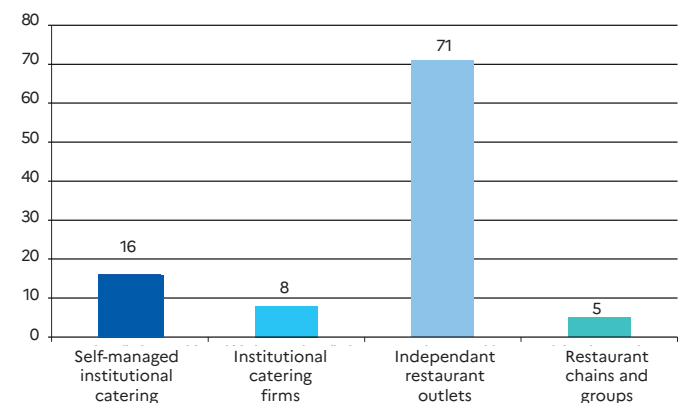
Crustaceans (%)



Canned products (%)



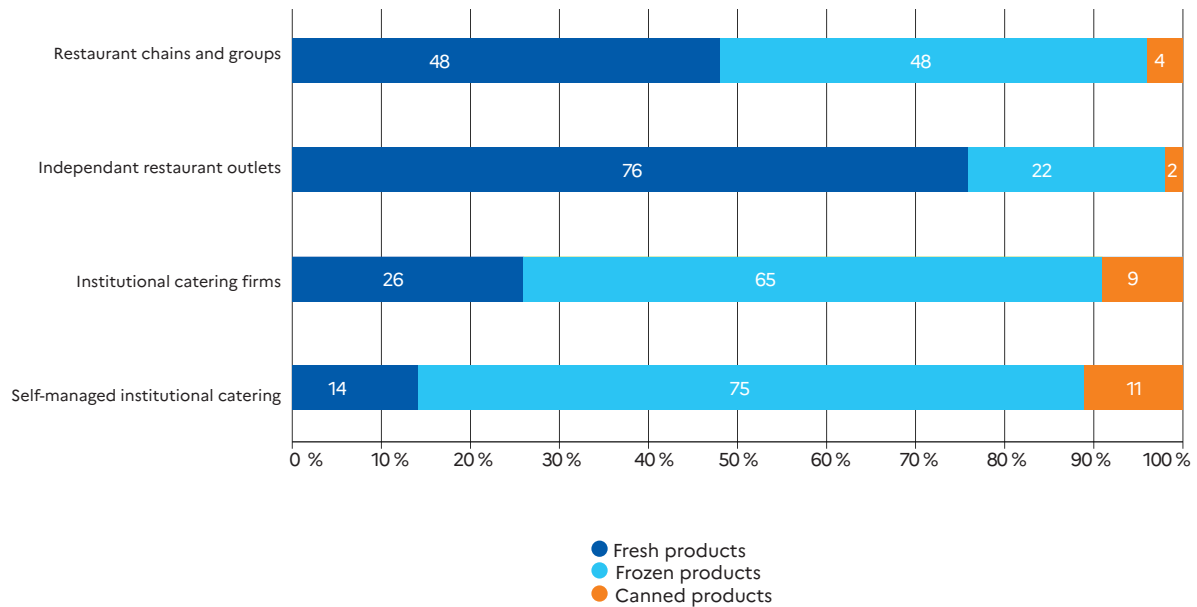
Cephalopods (%)



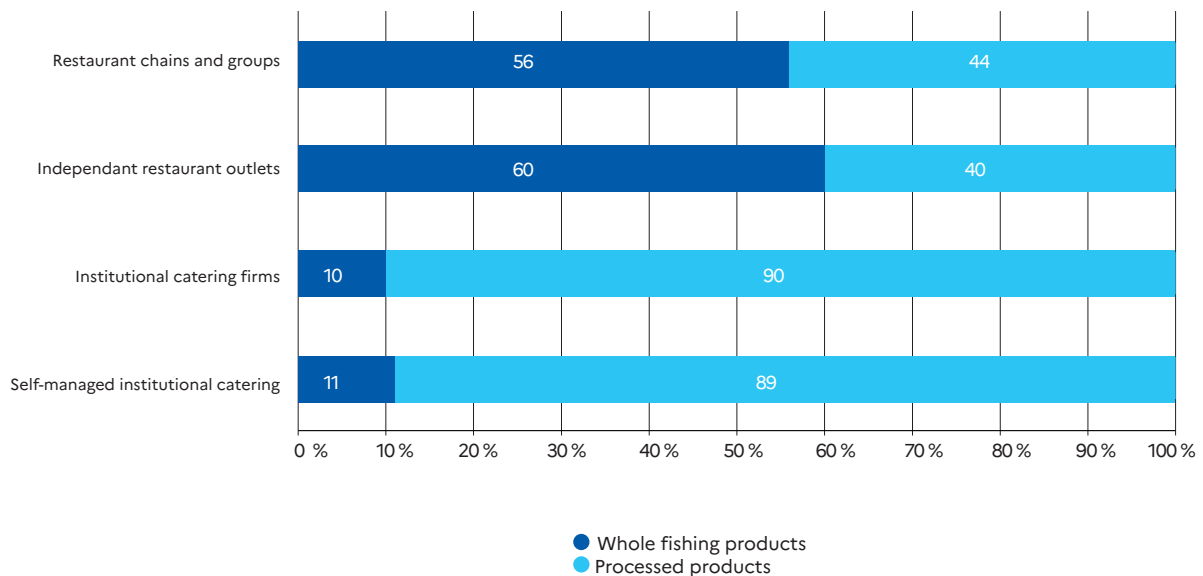
Source : FranceAgriMer from GiraFoodService

## • Breakdown of purchases by distribution channel

### Breakdown of purchases by kind of conservation for different outlets (quantities)



### Breakdown of purchases by outlet for different presentations (quantities)<sup>(1)</sup>



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

Source : FranceAgriMer from GiraFoodService

# DATA COLLECTION METHODOLOGY

Data Included data are the last available on April the 12th 2019.

Foreign Trade Raw Import/export data are provided by French Customs on a net weight basis. It is converted here into their live weight equivalent, i.e. before any product processing, using coefficients that have been established for each product code.

Processing Processing firms data arise from a survey carried out in 2017 among main or secondary processing activity identified firms. Besides, information about non-processing trading firms arises from FranceAgriMer's updated fish trading firms database (notably from the French National Institute for Statistics and Economic Studies' firm lists, sanitary approvals, financial databases and professional sources).

Consumption French consumption may be measured in two ways:

- firstly, by calculating supply balance or apparent consumption (production + imports - exports),
- secondly by using consumer and restaurant panels.

Apparent consumption is measured in live weight equivalent and includes the overseas territories (French Caribbean Islands, Reunion Island, Mayotte and French Guyana). In contrast, consumer and restaurant data are expressed in net weight, meaning the weight as purchased by the final consumer (consumer panel) or by restaurants (restaurant panel), and exclude consumption in the overseas territories (and in Corsica for consumer panels). Panel data is based on declarations made by consumers and restaurant buyers and is thus non-exhaustive. Coverage varies according to the product in question, and the overall rate of coverage is approximately 80%.

To find out more information, especially about prices at all levels of the sector (production, trade, consumption), and their trends:

- FranceAgriMer Annual report 2018 of sales reported in tide halls
- FranceAgriMer Annual report 2018 of foreign trade in fishery products and aquaculture \*
- FranceAgriMer Annual report 2018 on the consumption of fishery products and aquaculture \*

\* coming 2019

VISIOMer inter-channel and off-the-shelf network sales data

MAA Ministry of Agriculture and Food

DPMA Maritime Fisheries and Aquaculture Branch

DAM Maritime Affairs Directorate

Ifremer Research Institute for the Exploitation of the Sea







## LES DONNÉES

The fisheries and aquaculture sector in France (2020)  
November 2020 edition



Director of publication : Christine Avelin  
Editor : Markets, studies and prospective department  
Design and production : Communication / Printing : Arborial department  
Photography ©Pixabay.com / fr  
ISSN : 2259-9177

12 rue Henri Rol-Tanguy - TSA 20002 / 93555 MONTREUIL Cedex  
Tél. : 01 73 30 30 00 [www.franceagrimer.fr](http://www.franceagrimer.fr)

 FranceAgriMer  
 @FranceAgriMerFR