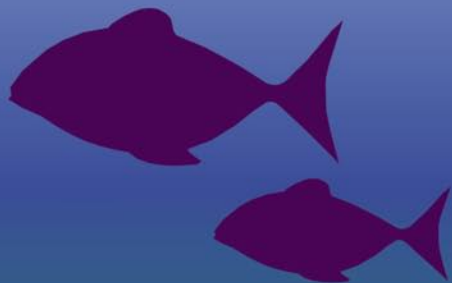




**Key figures  
for the fisheries and aquaculture sector in France  
2008 Edition**



Sources :

OFIMER : Office national interprofessionnel des produits de la mer et de l'aquaculture

DPMA : Direction des pêches maritimes et de l'aquaculture du Ministère de l'agriculture et de la pêche

SDSIM : Sous - Direction des systèmes d'information maritimes du Ministère de l'écologie,  
de l'énergie, du développement durable et de l'aménagement du territoire

DNSCE : Direction nationale des statistiques du commerce extérieur / Direction générale des douanes et des droits indirects  
du Ministère de l'industrie, de l'économie et de l'emploi

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



## Key figures for the fisheries and aquaculture sector in France

### Production

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- 9 Sales of aquaculture products
- 10 Fishing fleet
- 11 Aquaculture firms
- 12 Jobs

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- 15 Breakdown of firms by total net sales

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The OFIMER Fisheries and Aquaculture Economic Observatory  
presents the 2008 edition of "Key figures for the fisheries and aquaculture sector in France"

Here is an overview of activity for the entire sector in metropolitan France and the overseas territories:  
Fisheries, Aquaculture, Wholesaling, Processing, Imports, Exports,  
Distribution and Consumption.

These figures will allow you to increase your understanding of the French seafood sector  
as a whole and become aware of its most recent trends. Readers will appreciate the importance  
of this sector which contributes to the high performance of the French agrofood industry.

I want to thank the different organisations which have contributed  
to the quality of this document and the data contained therein :  
the Directorate for Sea Fisheries and Aquaculture at the Ministry of Agriculture and Fisheries,  
the Vice-Directorate for Marine Statistics at the Ministry of Ecology, Energy, Sustainable Development  
and Land Management,  
the Directorate for International Trade Statistics at the Ministry of Industry, Economics and Employment.  
IFREMER [the French Research Institute for Exploitation of the Sea] as well as the production and trade organisations..

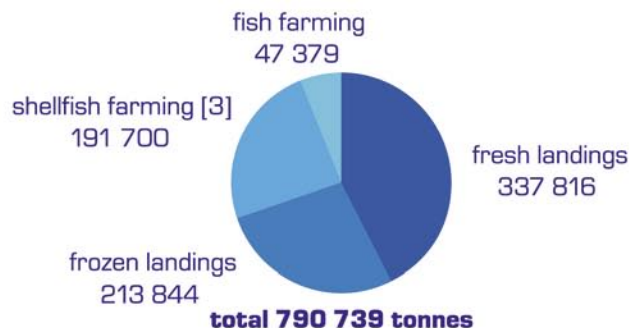
Michel Peltier  
Director of OFIMER

# Total sales of fishery and aquaculture products

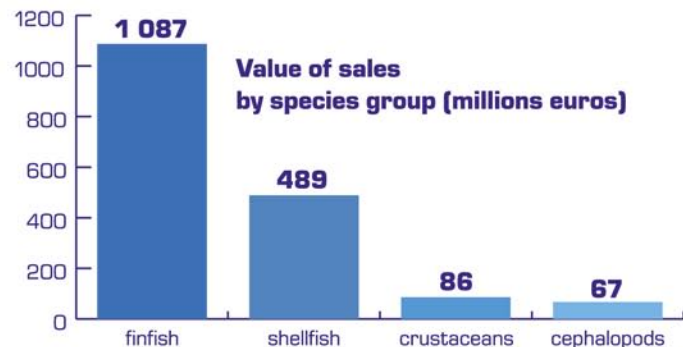
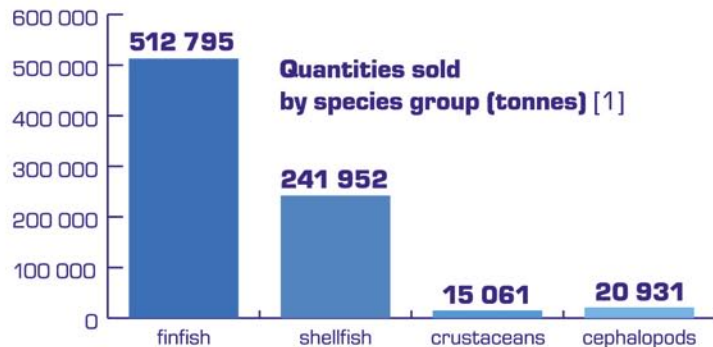
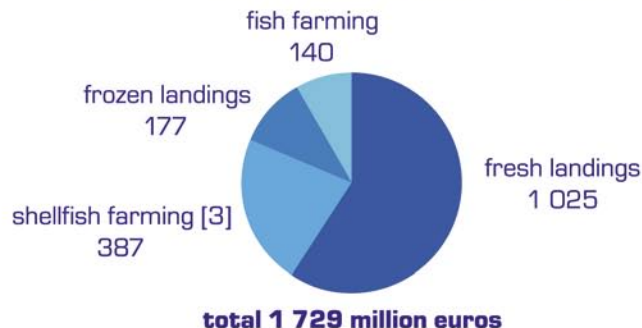
Metropolitan France and overseas territories in 2006

Source : DPMA

Quantities sold by method of production (tonnes) [1] [2]



Value of sales by method of production (millions euros) [2]



[1] live weight

[2] excluding seaweed

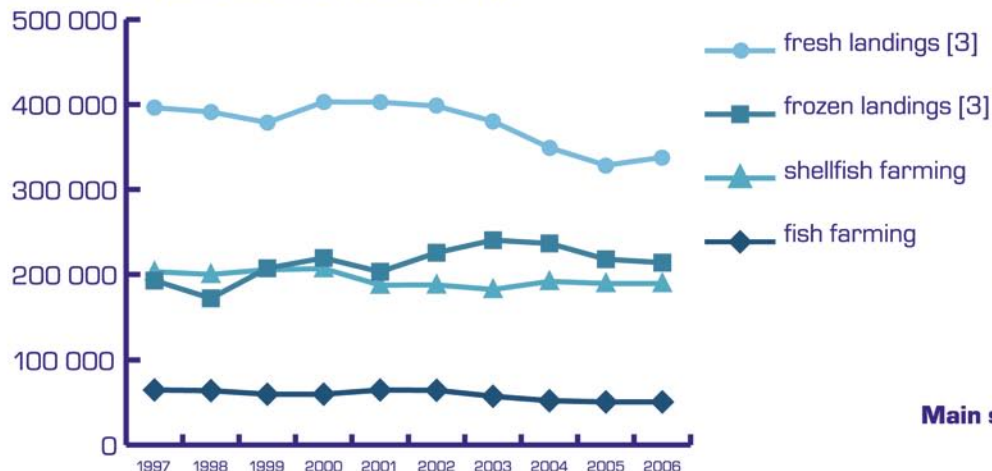
[3] including farmed crustaceans

# Total sales of fishery and aquaculture products

Metropolitan France and overseas territories

Source : DPMA

Changes in quantities sold (tonnes) [1] [2]



**Quantities sold in 2006 [1] [2]**

metropolitan France 768 059 tonnes  
overseas territories 22 680 tonnes

**Value of sales in 2006 [2]**

metropolitan France 1 566 million euros  
overseas territories 162 million euros

**Main species sold in 2006 (tonnes) [1] [2] [4]**

tuna	135 223
oyster	116 200
mussel	77 300
herring	39 496
sardine	36 076
trout	33 776
saithe	24 313
blue whiting	24 005
great atlantic scallop	21 692
monkfish	19 607

[1] quantities in tonnes equivalent landed weight till 1999 then in live weight from 2000 on

[2] excluding seaweed

[3] total sales by French vessels : sales at auction, direct sales, sales to processing industry and export sales

[4] excluding overseas territories

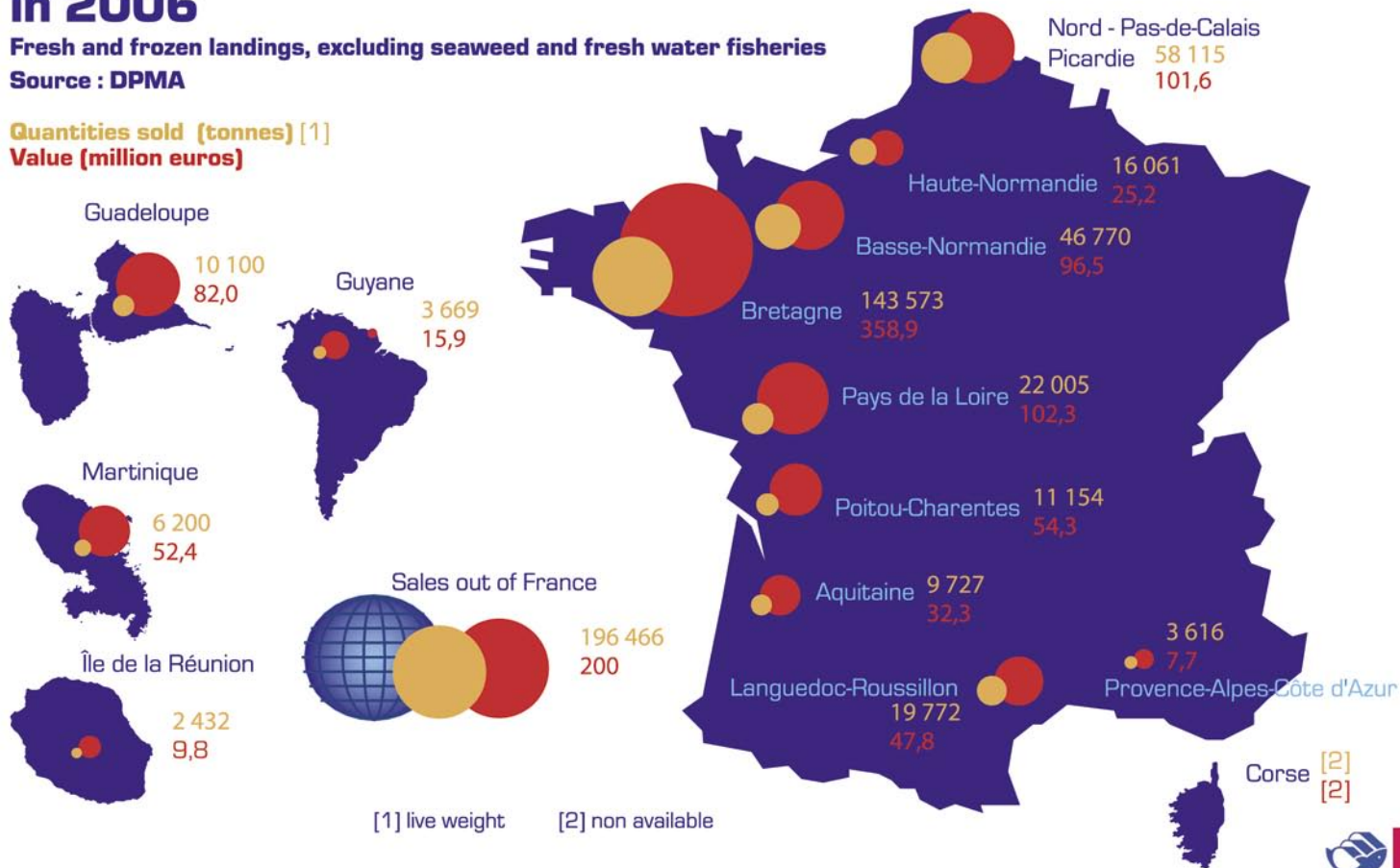
# Breakdown by region of total sales of fishery products in 2006

Fresh and frozen landings, excluding seaweed and fresh water fisheries

Source : DPMA

Quantities sold (tonnes) [1]

Value (million euros)



[1] live weight

[2] non available

# Sales of fishery products at auction

Source : OFIMER

Number of auctions in 2007 : 42

## Sales by French vessels in 2007

Quantities sold	234 019 tonnes
Value of sales	689 million euros

## Sales by foreign-registered vessels in 2007

Quantities sold	5 529 tonnes
Value of sales	17 million euros

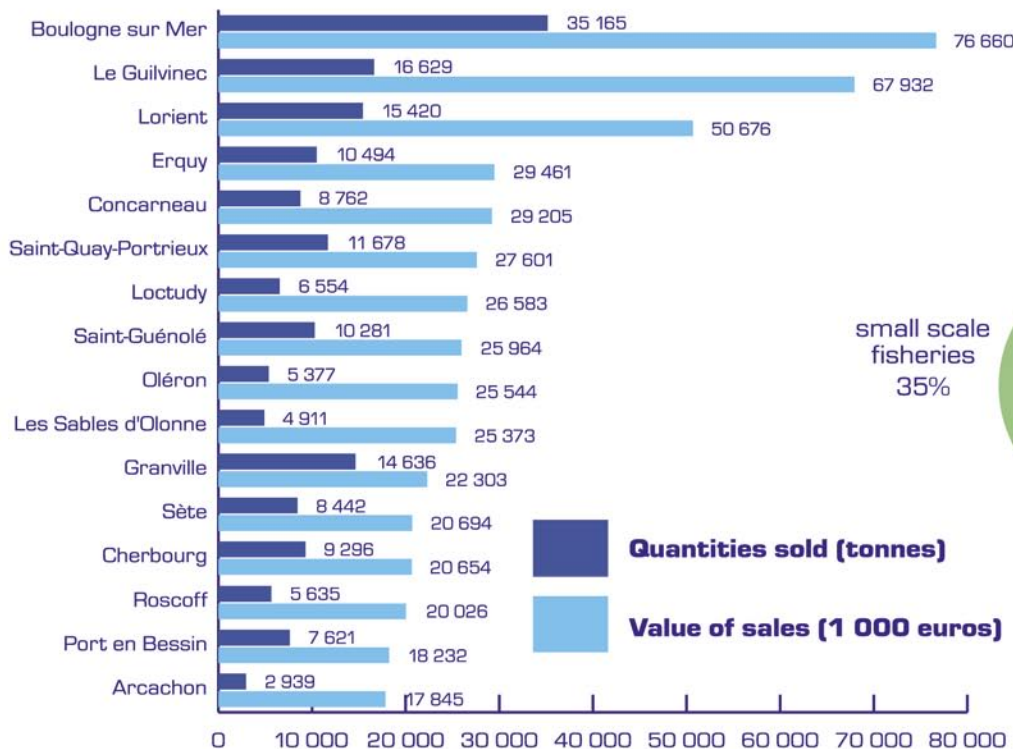




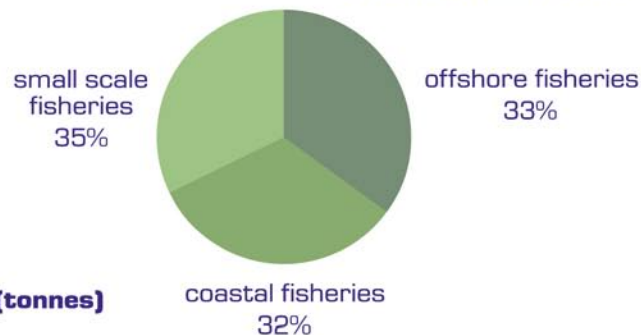
# Sales of fishery products at auction

Quantities sold and value of sales by French vessels at the main auctions in 2007

Source : OFIMER



Breakdown of quantities sold by French vessels in 2007 by fishery category [1]

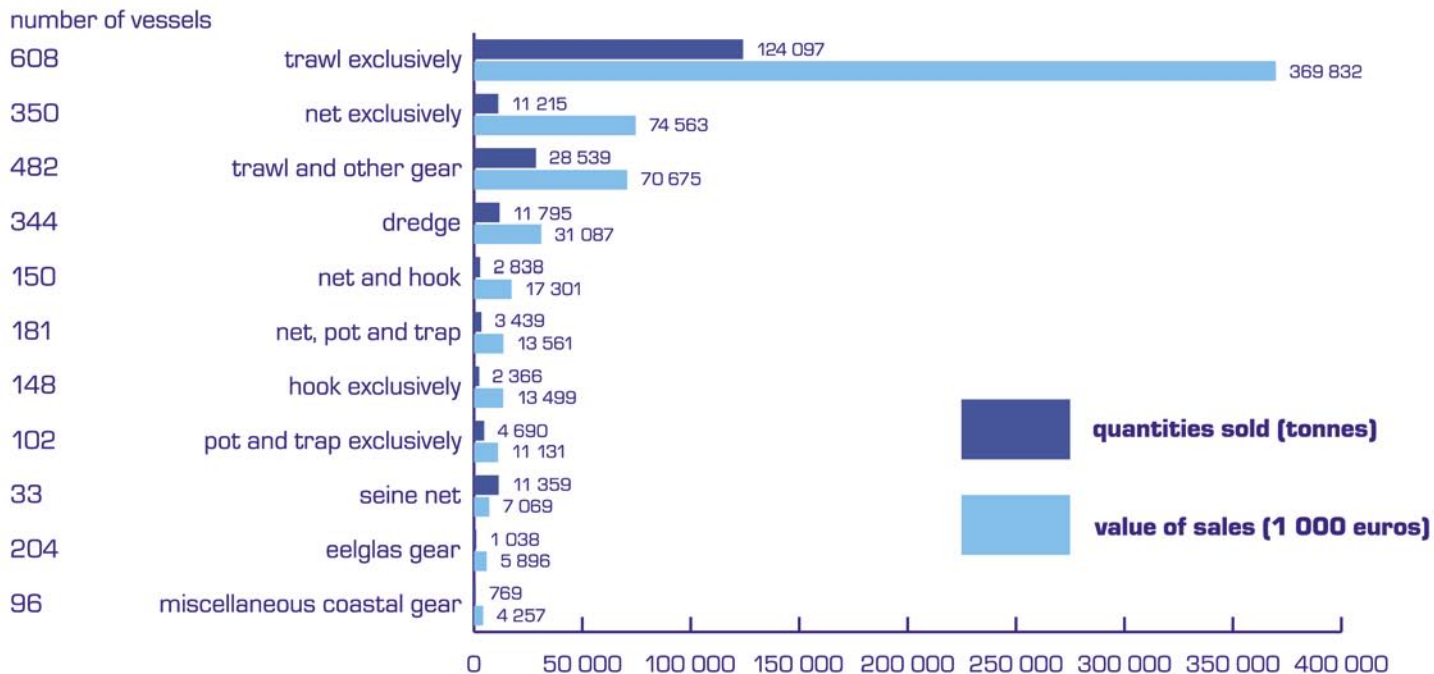


[1] as defined in page 10

# Sales of fishery products at auction

Breakdown of quantities sold and value of sales in 2007 by fleet segment [1] [2]

Source : OFIMER/IFREMER



[1] breakdown by fleet segment based on main gear used by vessels according to the 2006 IFREMER SIH survey

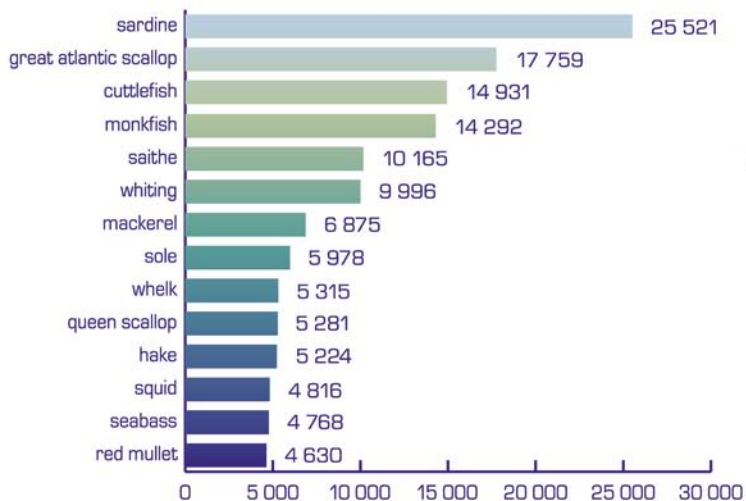
[2] excluding Mediterranean sea

# Sales of fishery products at auction

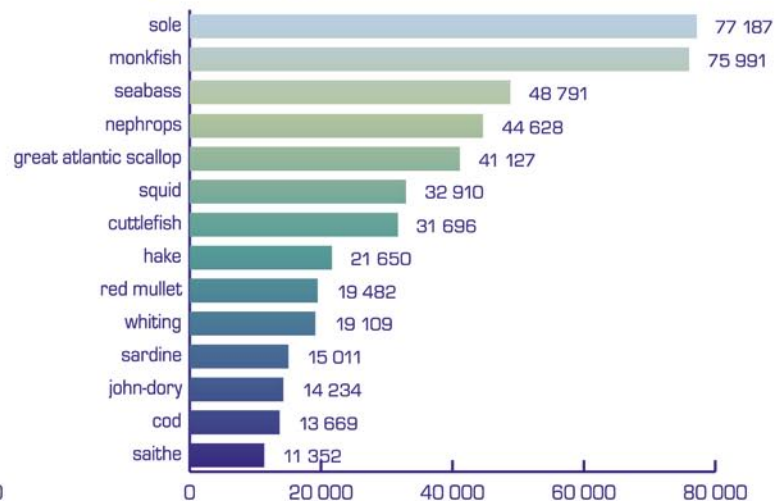
Main species sold by French vessels in 2007

Source : OFIMER

## Quantities sold (tonnes)



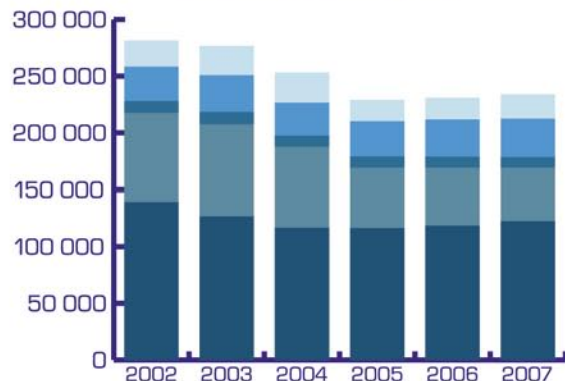
## Value (1 000 euros)



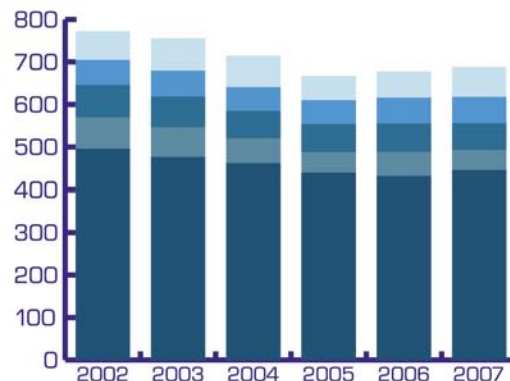
# Sales of fishery products at auction

Source : OFIMER

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



**Changes in value of sales (million 2007 euros)  
by the French vessels by species group**



# Sales of aquaculture products

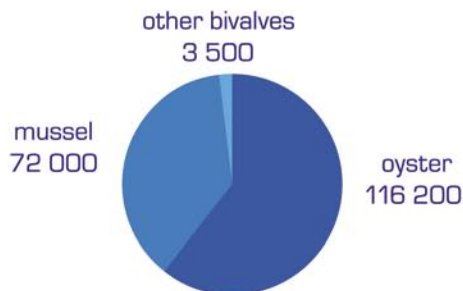
Metropolitan France

Source : DPMA

Quantities sold in 2006 (tonnes) [1]

total : 238 000 tonnes

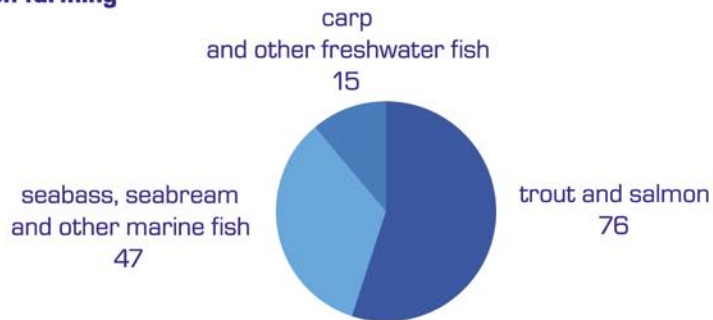
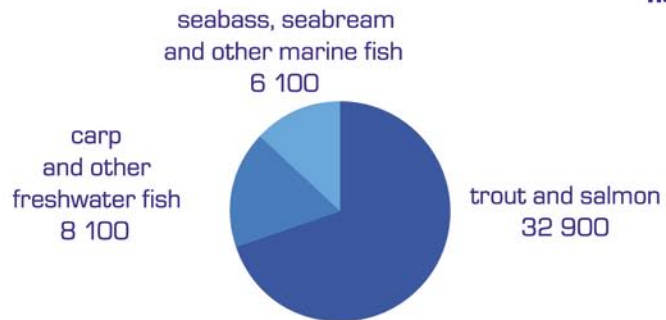
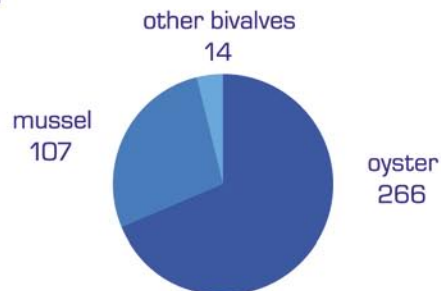
shellfish farming [2]



Value of sales in 2006 (million euros)

total : 525 million euros

fish farming



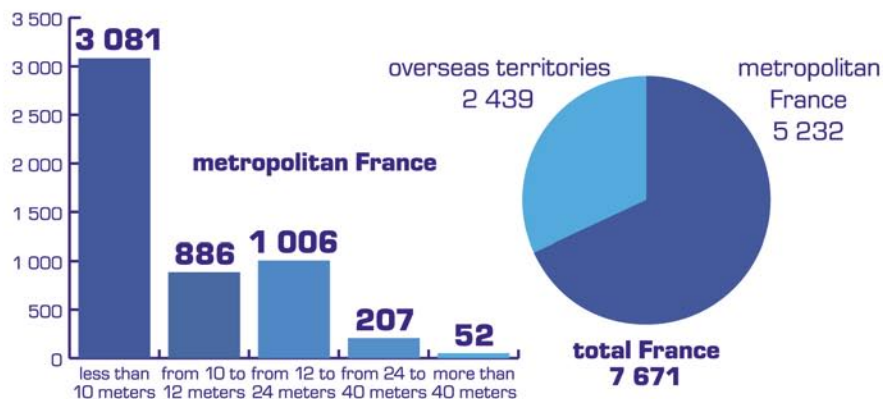
[1] live weight

[2] including farmed crustaceans

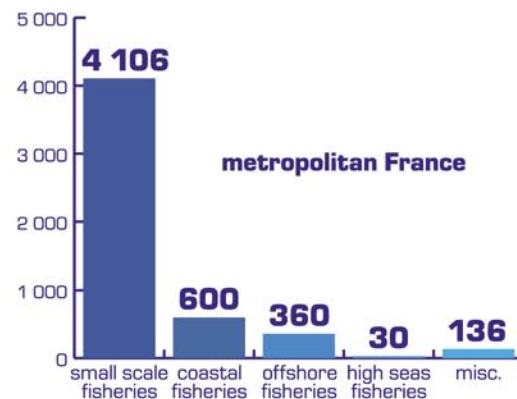
## Fishing fleet in 2006 [1]

Source : SDSIM / Fichier BARPOP

### Breakdown of total vessels by length



### Breakdown of total vessels by fishery category



Small scale fisheries

Coastal fisheries

Offshore fisheries

High seas fisheries

Out of port ≤ 24 hours

24 hours < out of port ≤ 96 hours

Out of port > 96 hours

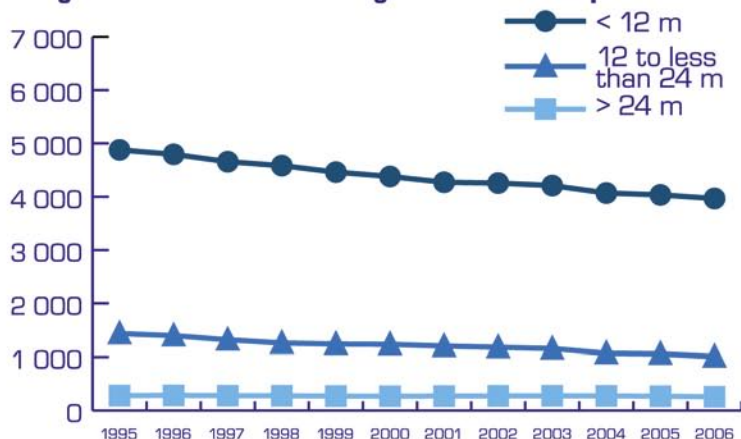
Vessels over 1 000 GRT or vessels over 150 GRT if out of port > 20 days

[1] excluding vessels engaged in aquaculture and small scale fisheries

## Fishing fleet [1]

Source : SDSIM / Fichier BARPOP

Changes in the number of fishing vessels in metropolitan France



	< 12 m	12 à moins de 24 m	24 m et plus
<b>1995</b>	4 878	1 434	281
<b>1996</b>	4 795	1 395	285
<b>1997</b>	4 656	1 318	279
<b>1998</b>	4 583	1 258	277
<b>1999</b>	4 461	1 239	271
<b>2000</b>	4 380	1 233	270
<b>2001</b>	4 271	1 201	272
<b>2002</b>	4 256	1 179	275
<b>2003</b>	4 209	1 155	277
<b>2004</b>	4 069	1 068	274
<b>2005</b>	4 034	1 057	269
<b>2006</b>	3 967	1 006	259

## Aquaculture firms

Source : DPMA (aquaculture survey 2005)

Number of aquaculture firms in 2005

shellfish farming	3 317
marine fish farming (including seaweed and shrimps)	36
fresh water fish farming (excluding pond aquaculture)	306

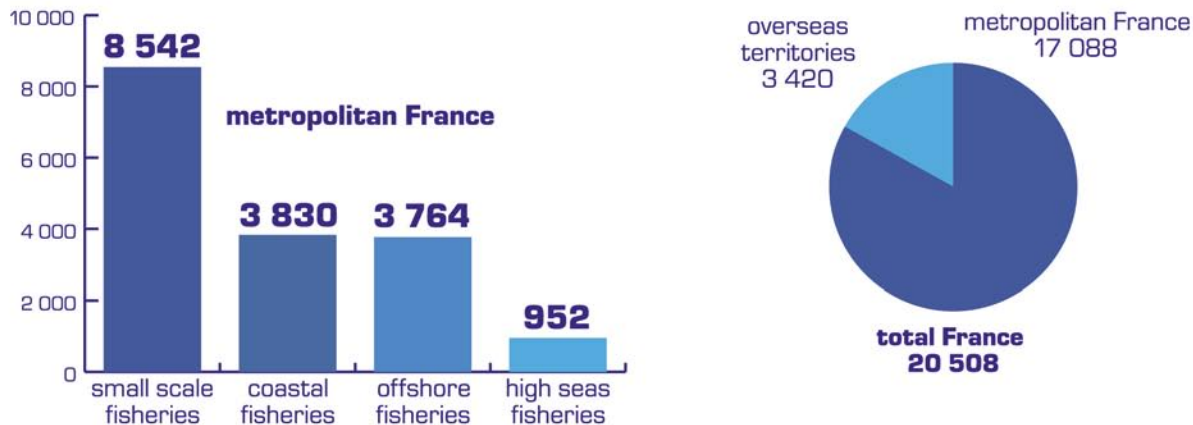
[1] excluding vessels engaged in aquaculture and small scale fisheries

## Jobs

**Number of seamen employed on board French fishing vessels in 2006**

**(seamen of all nationalities - excluding seamen on vessels engaged in aquaculture and small scale fisheries)**

Source : SDSIM



**Number of full time equivalent jobs**

Source : IFREMER for fisheries, DPMA for the other sectors

fisheries in 2006 [1]	9 782
shellfish farming (including seaweed and shrimps) in 2006	9 933
marine fish farming in 2006	493
fresh water fish farming (excluding pond aquaculture) in 2006	1 070

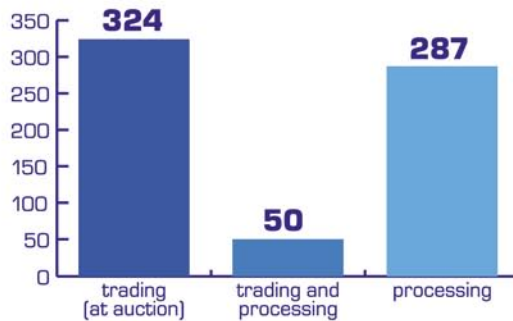
[1] excluding Mediterranean sea



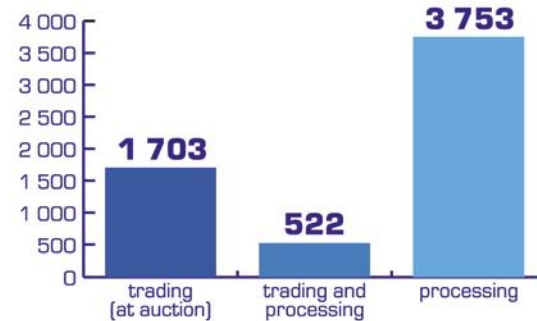
## Economic data 2006

Source : OFIMER

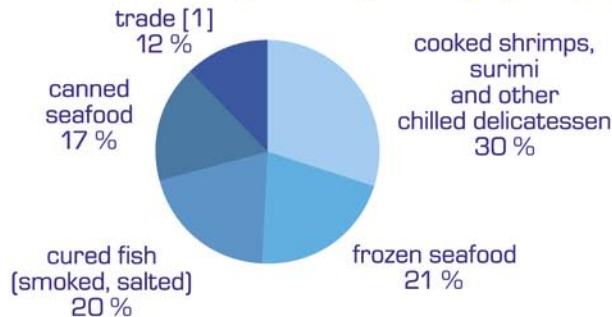
**Total number of firms**



**Total net sales of aquatic products (million euros)**



**Breakdown of total net sales in the processing industry by category of finished products**



**Full time equivalent jobs**

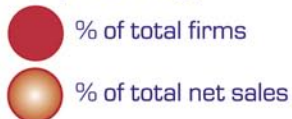
trading	5 500
processing	13 000

[1] including trade of canned or frozen seafood

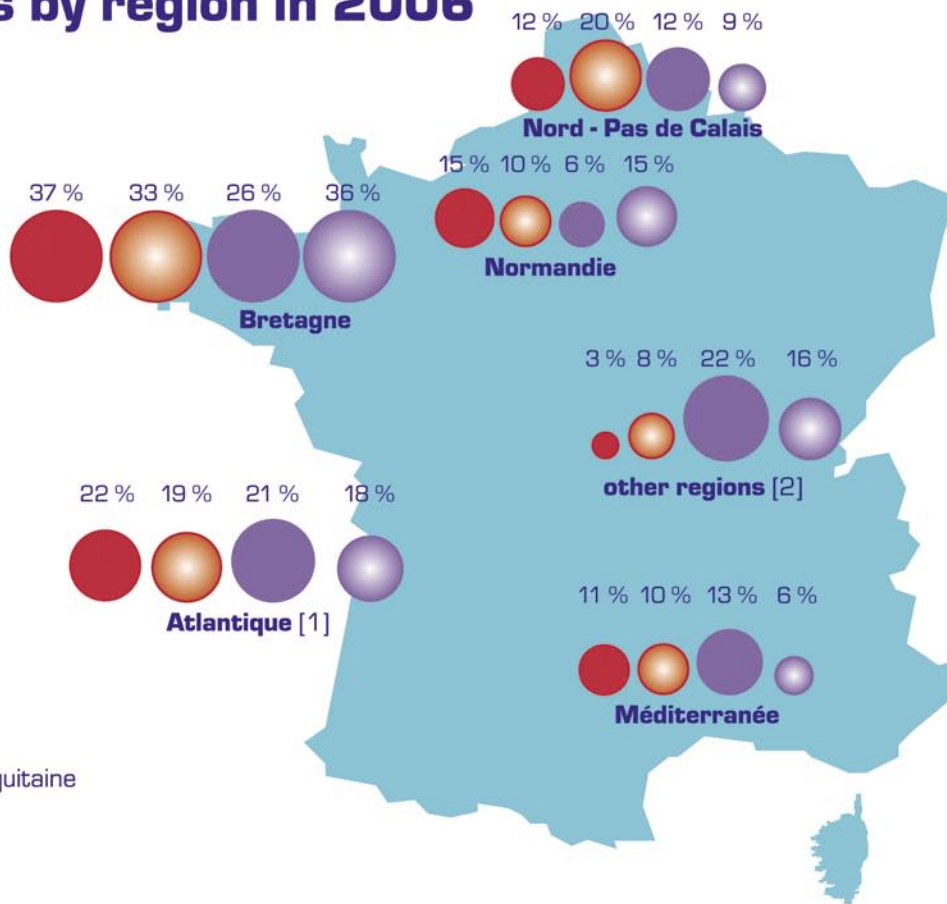
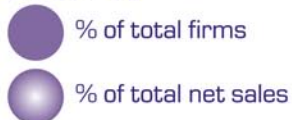
## Breakdown of the total number of firms and total net sales by region in 2006

Source : OFIMER

### Trading (including trading and processing)



### Processing



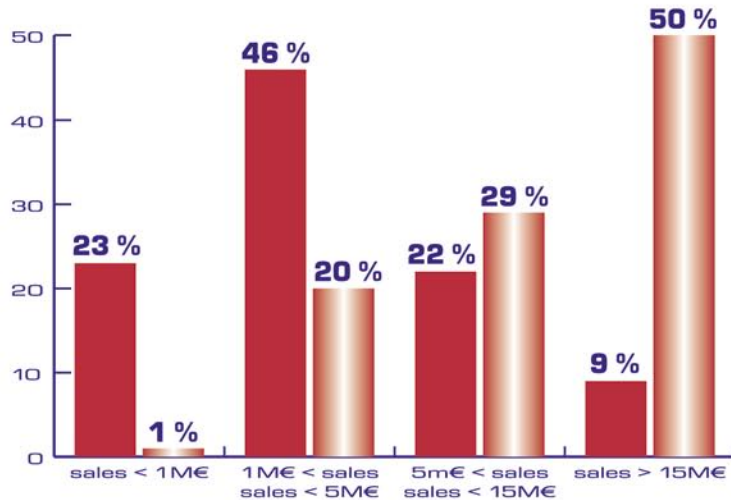
[1] Pays de la Loire, Poitou-Charentes, Aquitaine

[2] including overseas territories

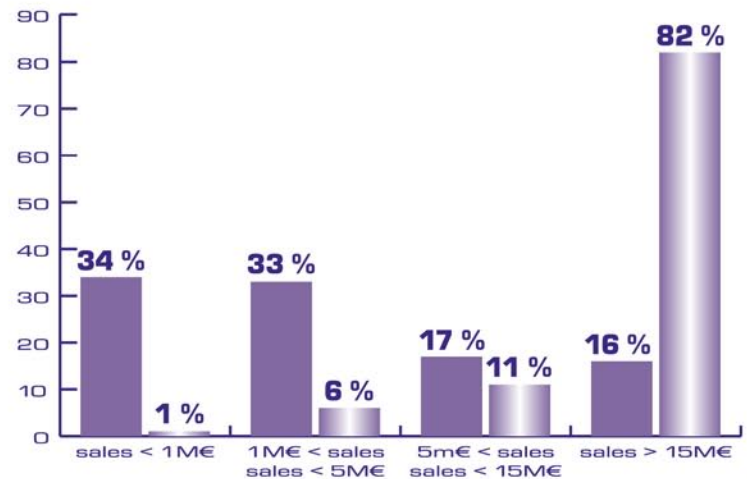
## Breakdown of total number of firms and total net sales by size class in 2006

Source : OFIMER

### Trading (including trading and processing)



### Processing

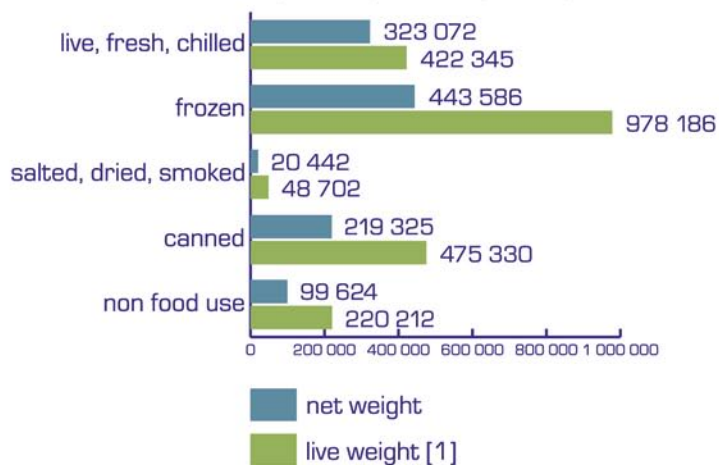


# Imports of aquatic products by presentation in 2007

Metropolitan France and overseas territories

Source : DNSCE

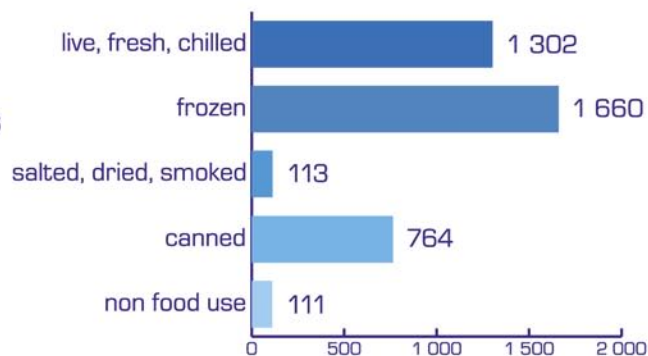
Imports by volume (tonnes)



**total net weight : 1 106 049 tonnes**

**total live weight : 2 144 775 tonnes**

Imports by value (million euros)



**total : 3 950 million euros**

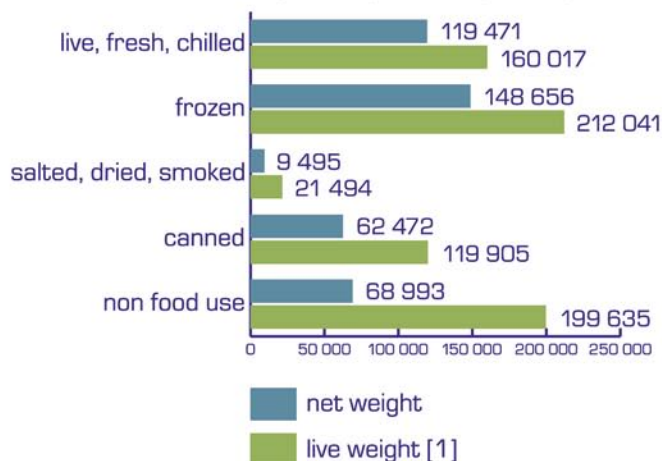
[1] data collection methodology is detailed on inside back cover

# Exports of aquatic products by presentation in 2007

Metropolitan France and overseas territories

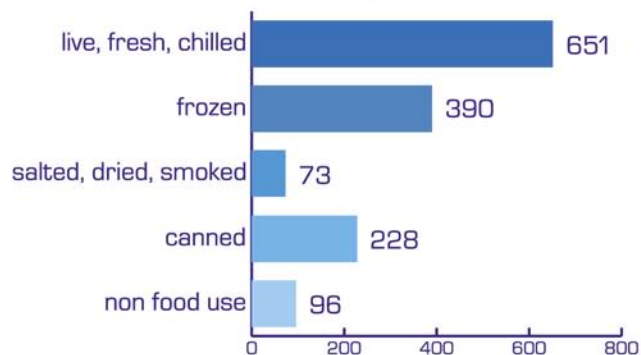
Source : DNSCE

### Exports by volume (tonnes)



**total net weight : 409 087 tonnes**  
**total live weight : 713 091 tonnes**

### Exports by value (million euros)



**total : 1 438 million euros**

**Trade gap : 2 512 million euros**

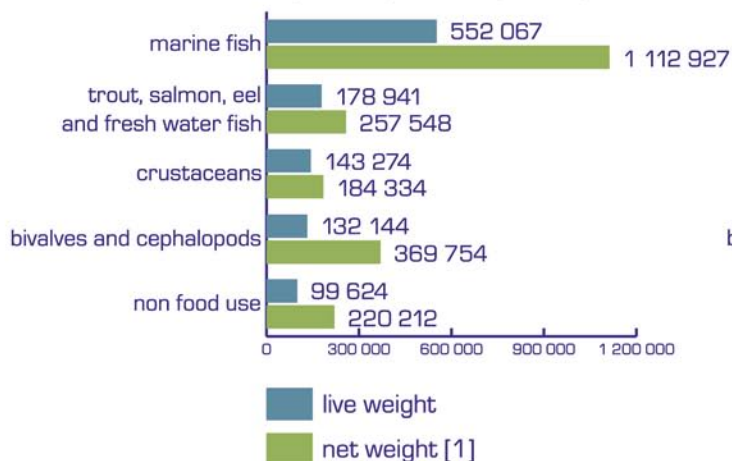
[1] data collection methodology is detailed on inside back cover

# Imports of aquatic products by species group in 2007

Metropolitan France and overseas territories

Source : DNSCE

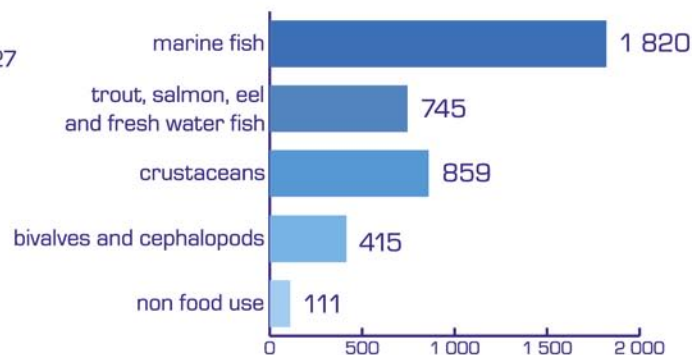
Imports by volume (tonnes)



**total net weight : 1 106 049 tonnes**

**total live weight : 2 144 775 tonnes**

Imports by value (million euros)



**total : 3 950 million euros**

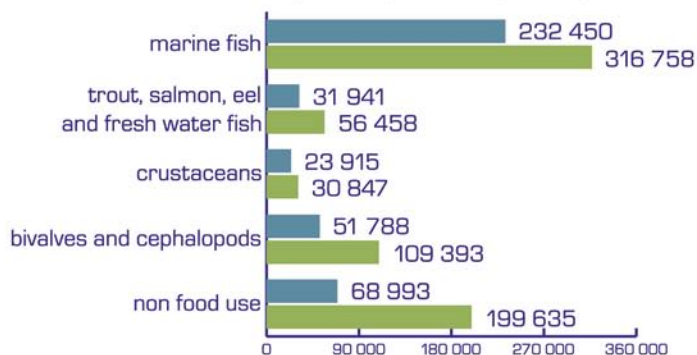
[1] data collection methodology is detailed on inside back cover

# Exports of aquatic products by species group in 2007

Metropolitan France and overseas territories

Source : DNSCE

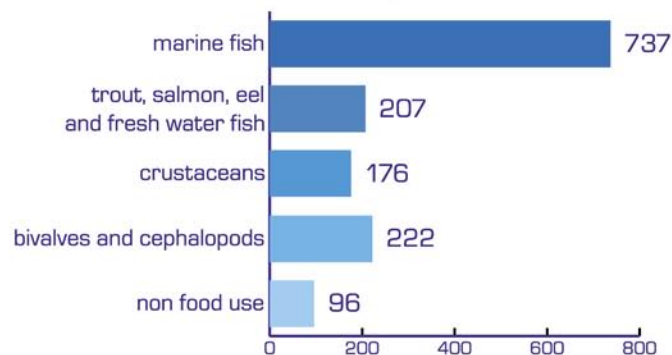
Exports by volume (tonnes)



net weight  
live weight [1]

**total net weight : 409 087 tonnes**  
**total live weight : 713 091 tonnes**

Exports by value (million euros)



**total : 1 438 million euros**

**Trade gap: 2 512 million euros**

[1] data collection methodology is detailed on inside back cover

# Imports of aquatic products by geographic origin in 2007

Metropolitan France and overseas territories

Source : DNSCE

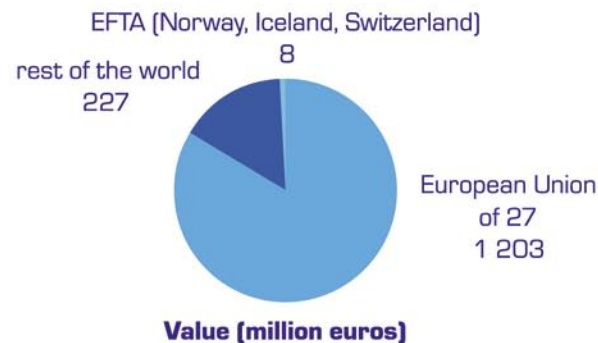
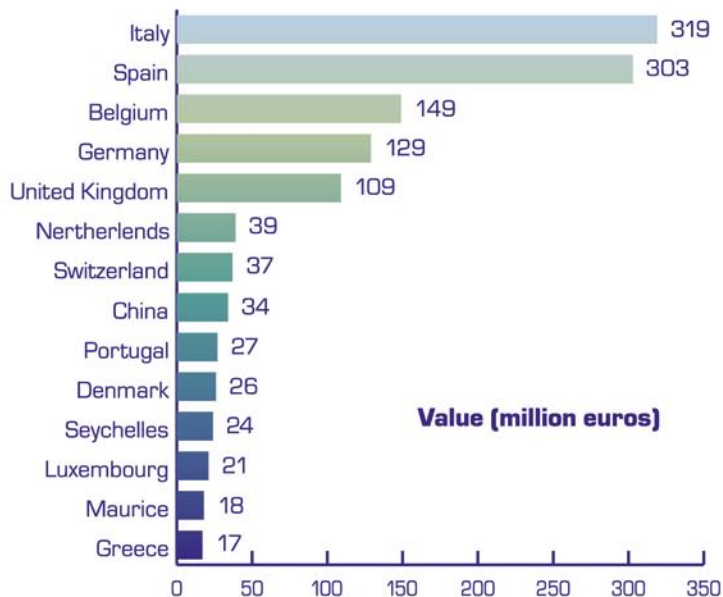




# Exports of aquatic products by destination in 2007

Metropolitan and overseas territories

Source : DNSCE



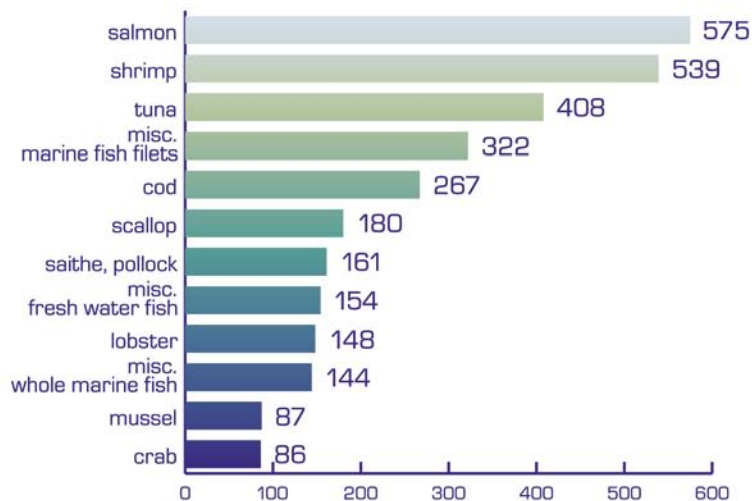
# Imports and exports of aquatic products

## Main species in 2007

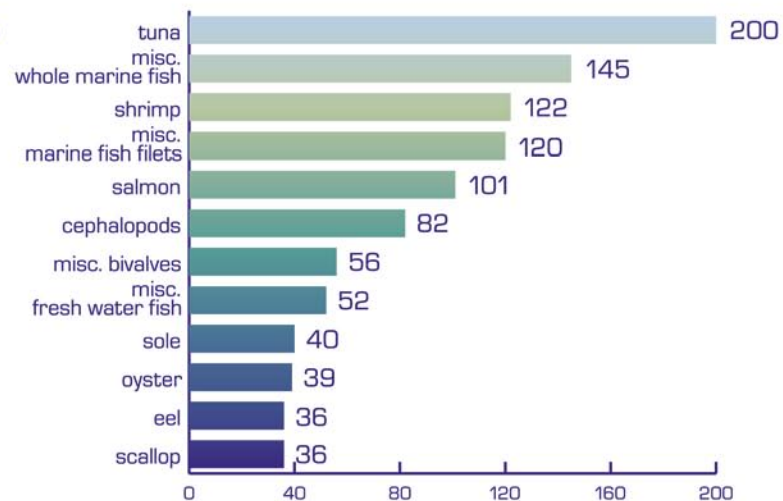
Metropolitan France and overseas territories

Source : DNSCE

Imports by value (million euros)



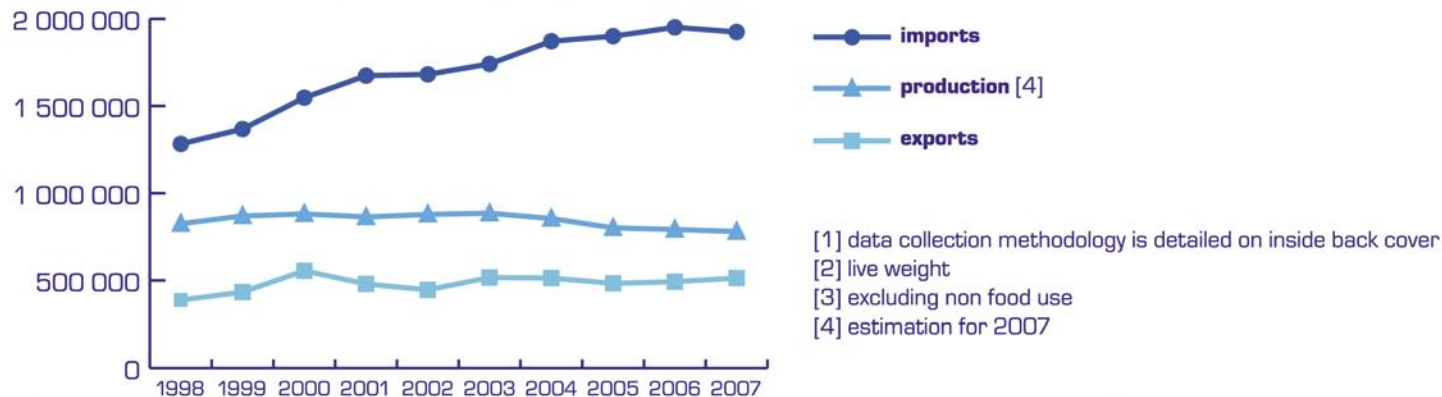
Exports by value (million euros)



## Supply balance = Production + Imports - Exports [1]

Source : OFIMER

### Changes in production, imports and exports (tonnes) [2] [3]



### Supply balance in quantities in 2007 (1 000 tonnes)



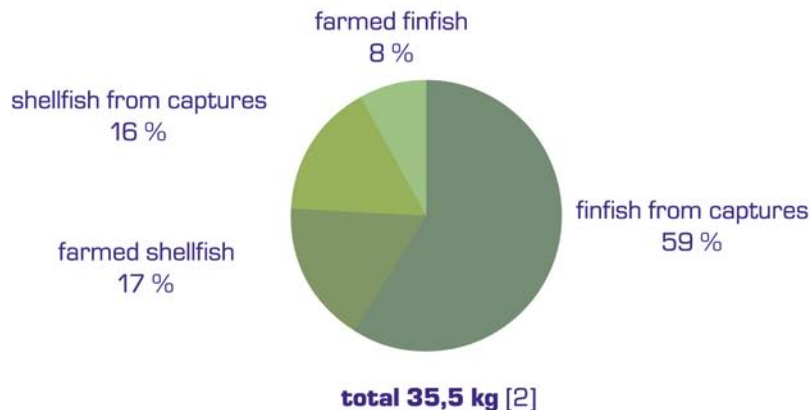
### Supply balance in value in 2007 (million euros)



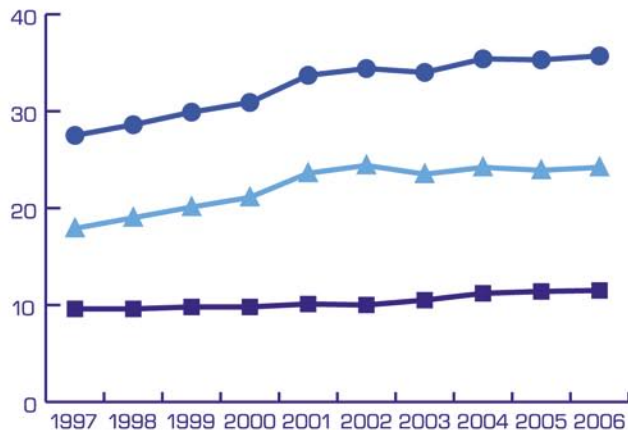
## Supply balance per capita and per year [1]

Source : OFIMER

Average 2004 2005 2006



### Changes in supply balance (kg) [2]



● total Average growth rate in the last ten years : 3 %

▲ finfish

■ shellfish (bivalves, crustaceans and cephalopods)

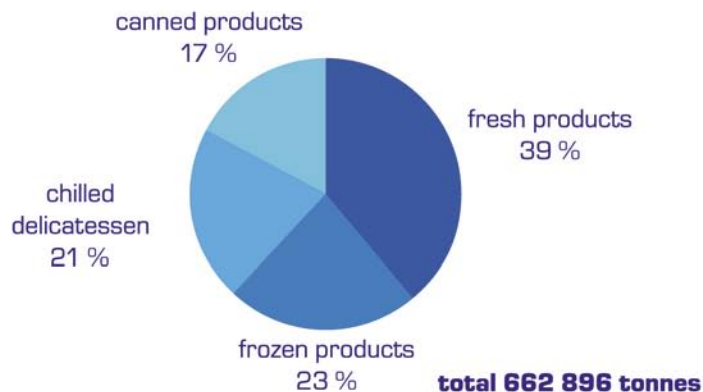
[1] data collection methodology is detailed on inside back cover

[2] live weight

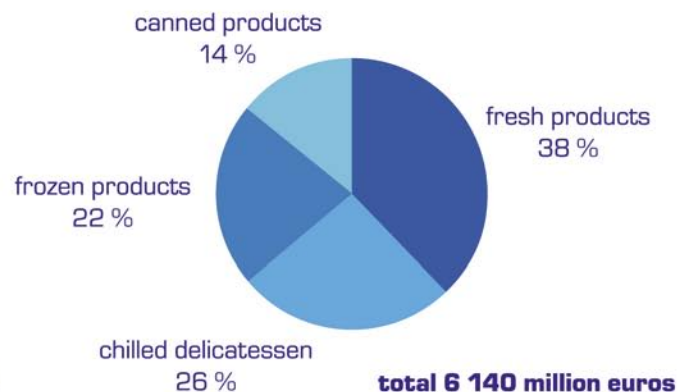
## Purchases of aquatic products by French households for home consumption in 2007 [1]

Source : OFIMER/TNS

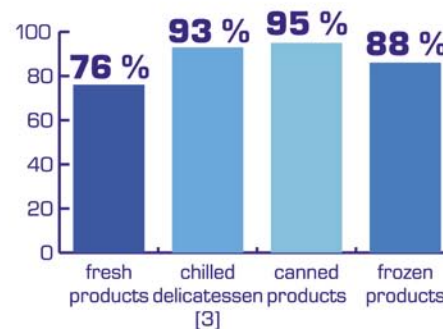
### Quantities purchased [2]



### Household spending



### Percentage of purchasing households [%]



[1] data collection methodology is detailed on inside back cover

[2] net weight

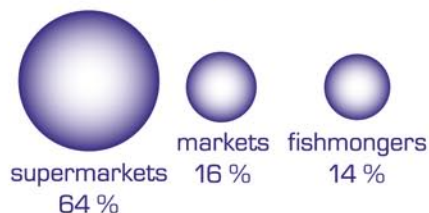
[3] with bar code

# Purchases of aquatic products by French households for home consumption in 2007

Source : OFIMER/TNS

Market shares value of distribution channels by presentation

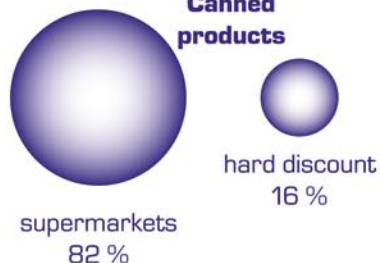
## Fresh products



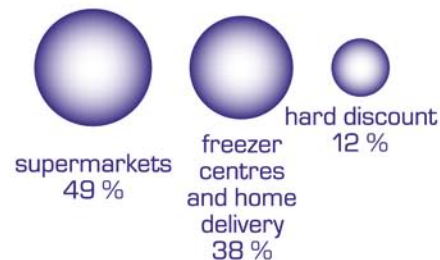
## Chilled delicatessen



## Canned products



## Frozen products

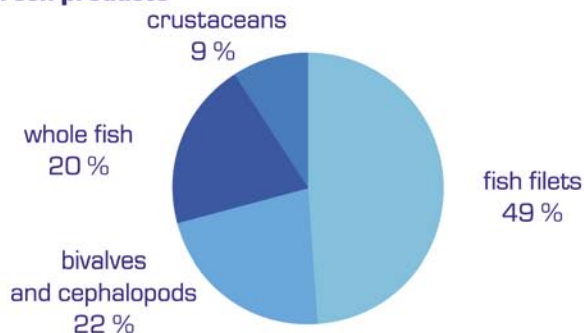


## Purchases of aquatic products by French households for home consumption in 2007

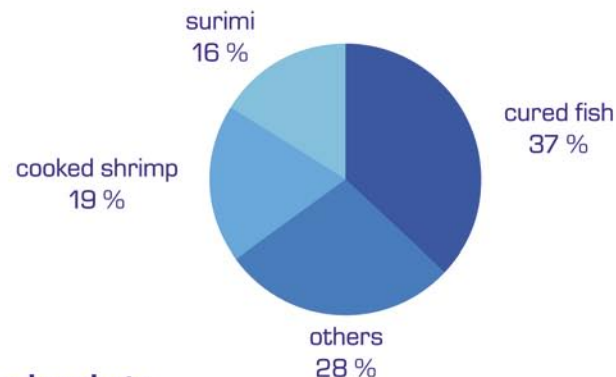
Breakdown of expenditure by presentation and species group

Source : OFIMER/TNS

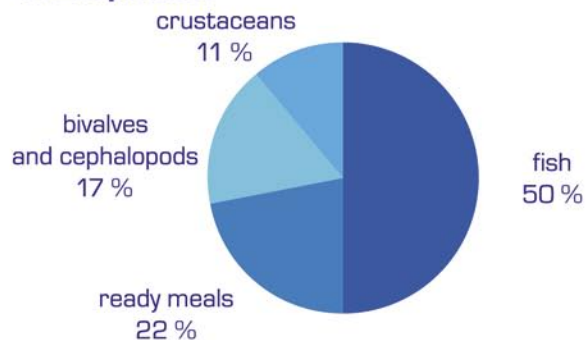
### Fresh products



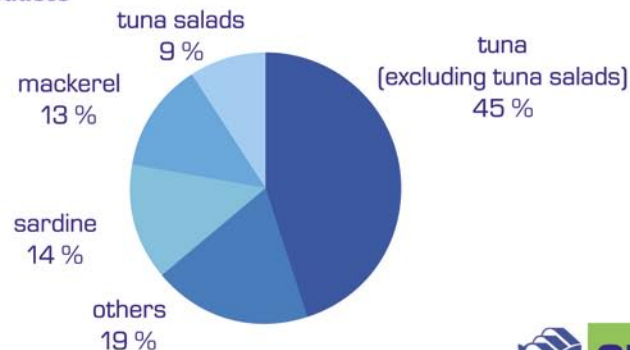
### Chilled delicatessen



### Frozen products



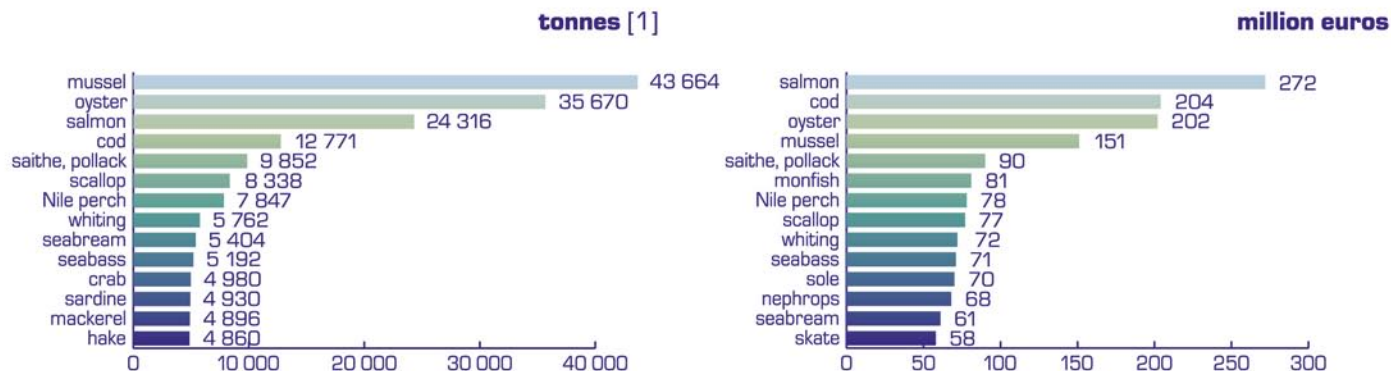
### Canned products



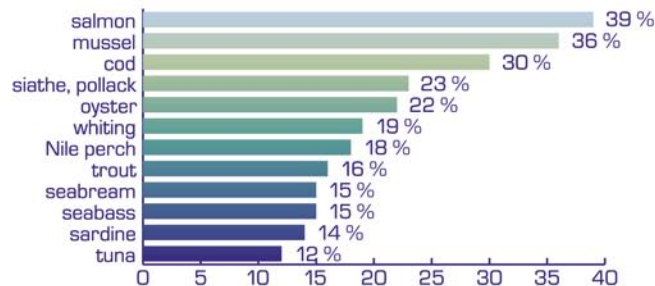
# Purchases of aquatic products by French households for home consumption in 2007

Source : OFIMER/TNS

Main species purchased fresh



## percentage of purchasing households



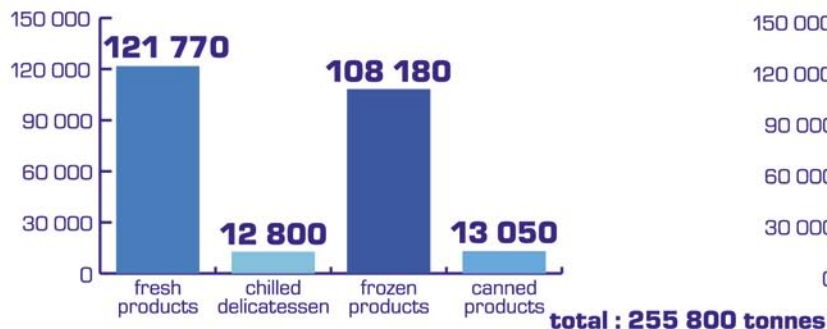
[1] net weight



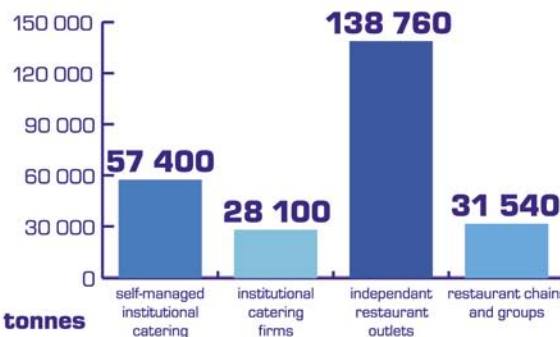
## Purchases of aquatic products by the catering sector in 2007

Source : OFIMER/GIRA Foodservice

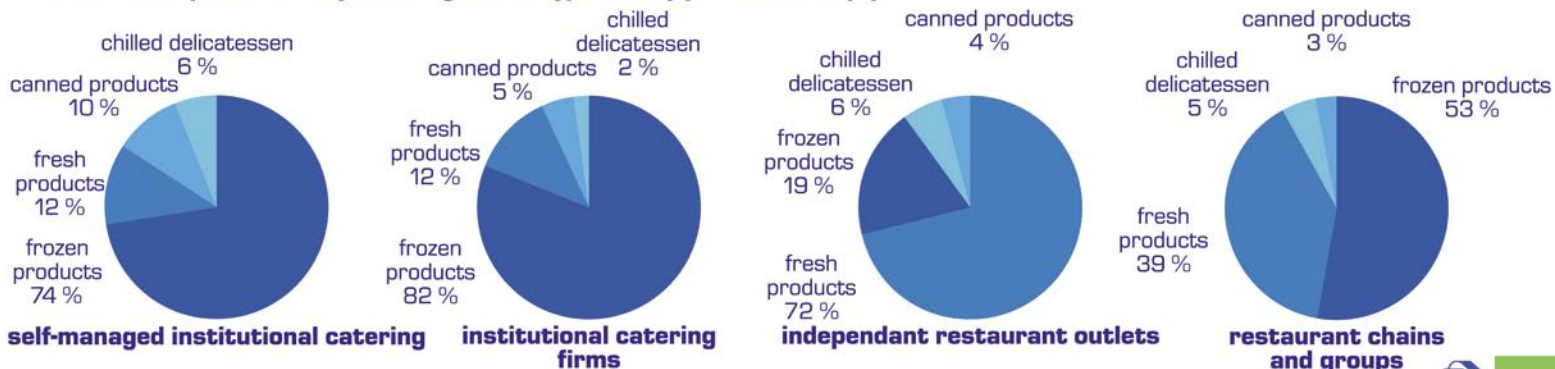
Quantities purchased by presentation (tonnes) [1]



Quantities purchased by catering outlet type (tonnes) [1]



Quantities purchased by catering outlet type and by presentation [1]

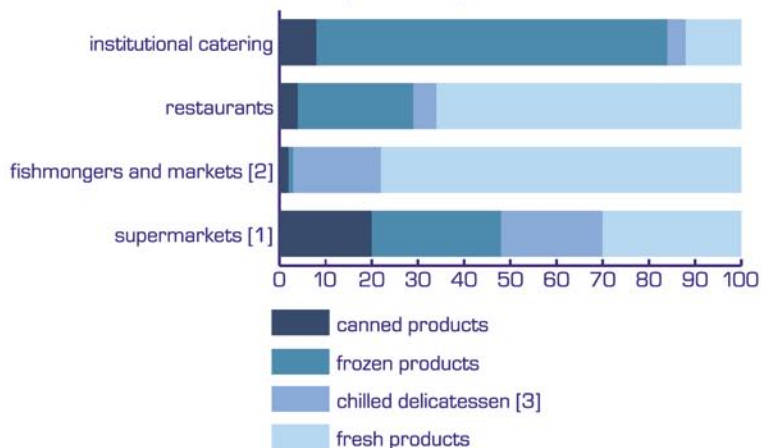


[1] net weight

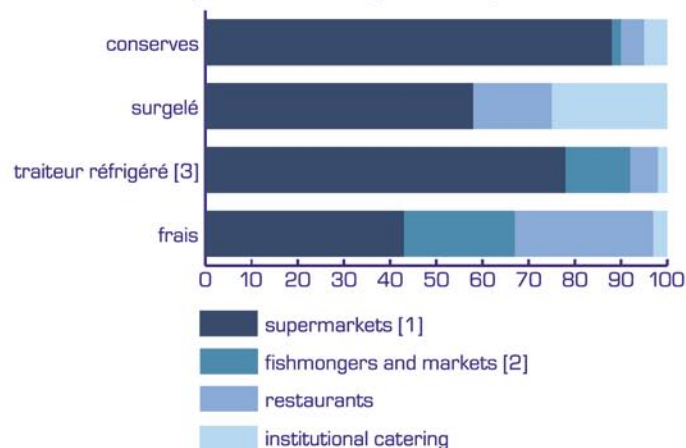
## Breakdown of purchases by distribution channel in 2007

Source : OFIMER/TNS and OFIMER/GIRA Foodservice

### Breakdown of purchases by presentation for the different outlets (% volume)



### Breakdown of purchases by outlet for the different presentations (% volume)



(tonnes) [3]	fresh products	chilled delicatessen	frozen products	canned products
supermarkets [1]	164 348	119 623	151 628	110 390
fishmongers and markets [2]	91 750	21 977	unsignificant	unsignificant
restaurants	111 514	9 209	43 081	6 497
institutional catering	9 973	3 719	65 091	6 718

[1] including hard discount, freezer centres and home delivery

[2] including direct sales

[3] net weight

## **Data collection methodology**

**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.

### **Consumption :**

French consumption may be measured in two ways :

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

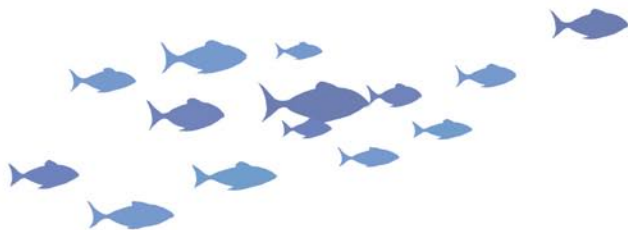
Apparent consumption is measured in live weight equivalent and includes the overseas territories (French Caribbean Islands, Reunion Island and French Guyana).

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,  
and especially about prices at all levels of the sector (production, trade, consumption) and their trend :**

[www.ofimer.fr](http://www.ofimer.fr) Filière (Sector section)

Bilan annuel OFIMER 2007 des ventes déclarées en halles à marée  
Bilan annuel OFIMER /DPMA 2006 de la production de la pêche et de l'aquaculture  
Bilan annuel OFIMER 2007 du commerce extérieur des produits de la pêche et de l'aquaculture  
Bilan annuel OFIMER 2007 de la consommation des produits de la pêche et de l'aquaculture



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