

# The fisheries and aquaculture sector in France

> EDITION april 2010



Production  
Trade  
Consumption

... Imports and exports / Supply balance

fishing fleet / aquaculture

distribution channel



# Summary

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## Production

page 3



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

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## Trade

page 15



Imports and exports by presentation  
Imports and exports by species group  
Imports and exports by geographical area  
Imports and exports by principal species

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## Consumption

page 21



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

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# Production

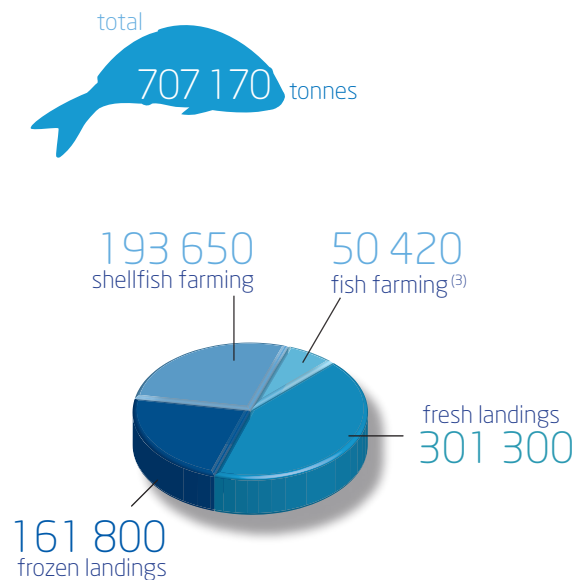


fishing fleet /  
aquaculture firms / jobs  
total sales of fisheries and aquaculture products

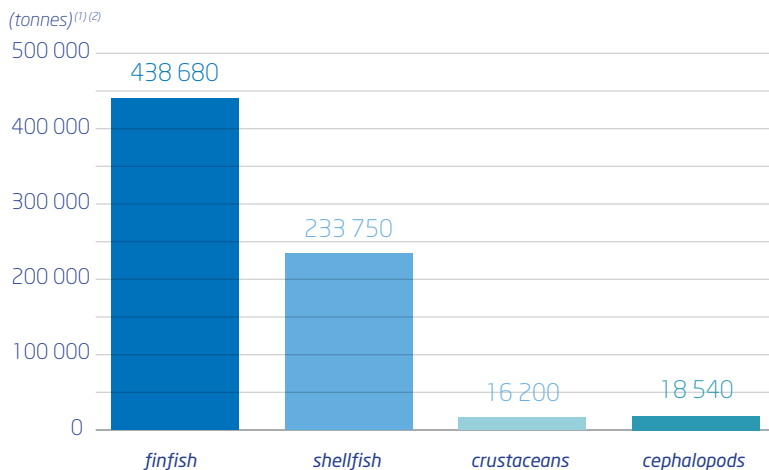


## Quantities sold in 2008 <sup>(1)(2)</sup>

by method of production (tonnes)

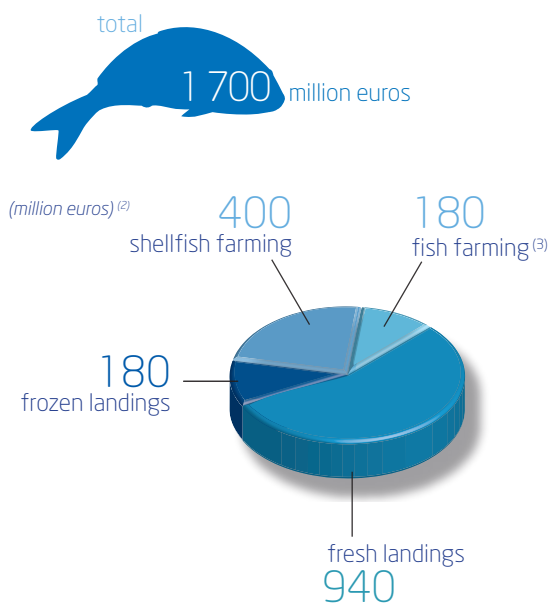


by species group

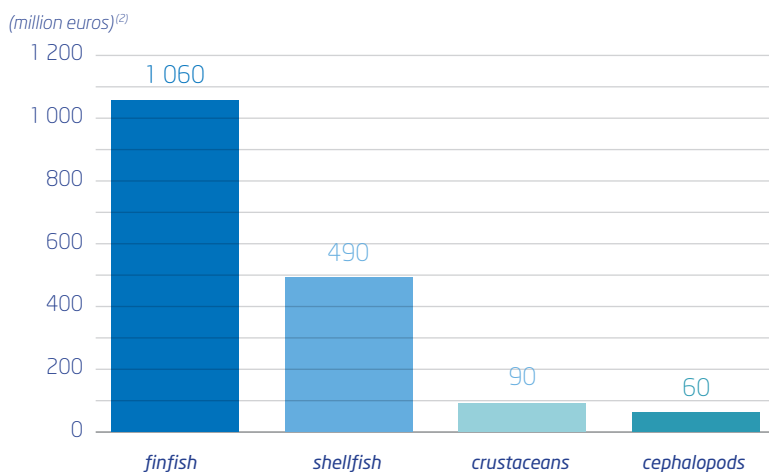


## Value of sales in 2008 <sup>(2)</sup>

by method of production



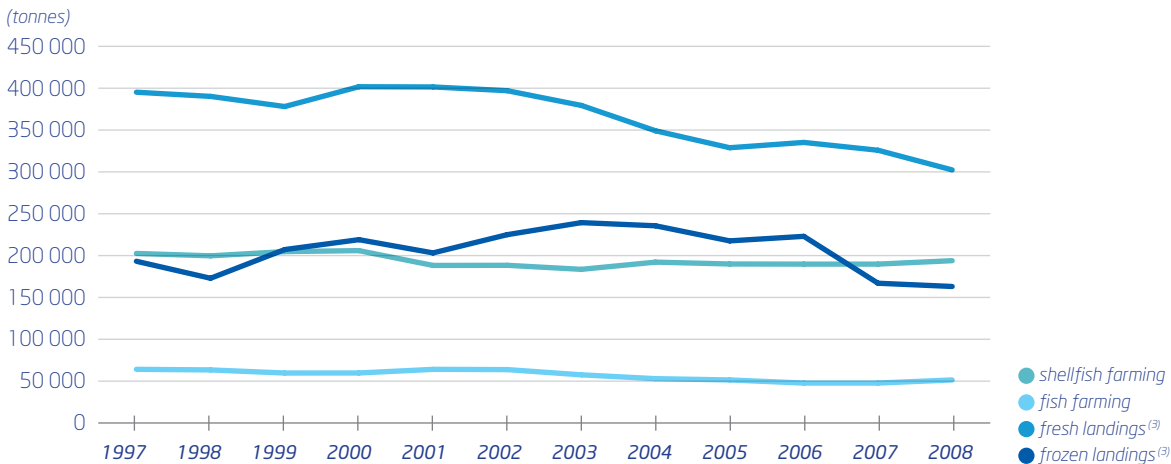
by species group



(1) live weight - (2) excluding marine seaweed - (3) including farmed crustaceans - Source: DPMA

# Total sales / metropolitan France and overseas territories in 2008

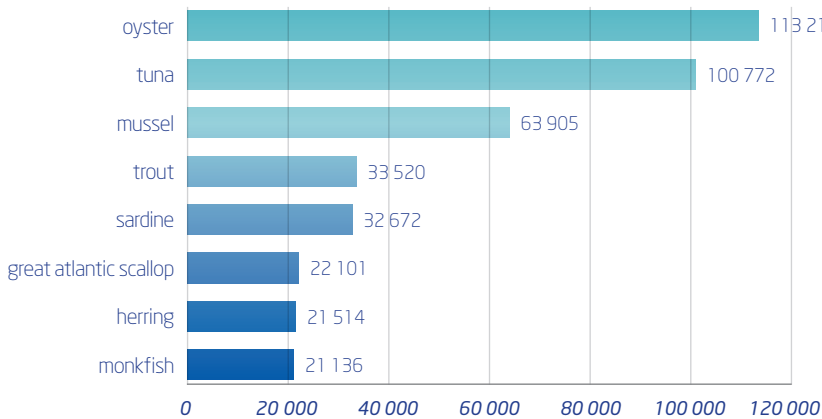
## Changes in quantities sold in metropolitan France <sup>(1)(2)</sup>



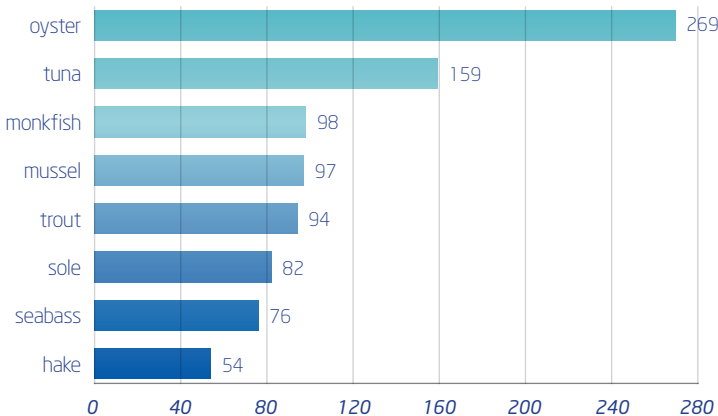
## Main species sold in 2008

(metropolitan France)

tonnes <sup>(1)</sup>

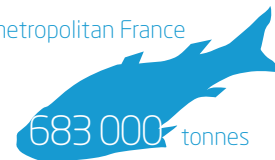


million euros



## Quantities sold in 2008 <sup>(1)(3)</sup>

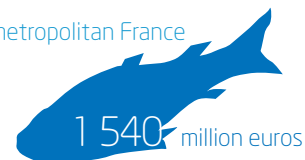
metropolitan France



overseas territories 24 170 tonnes

## Value of sales en 2008 <sup>(3)</sup>

metropolitan France



overseas territories 160 million euros

<sup>(1)</sup> quantities in tonnes equivalent landed weight till 1999, then in live weight from 2000 on

<sup>(2)</sup> excluding seaweed

<sup>(3)</sup> total sales by French vessels : sales at auction, direct sales, sales to processing industry and export sales

Source : DPMA



## Fresh and frozen landings, excluding seaweed and freshwater fisheries

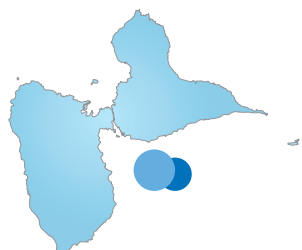
Source : DPMA

### Sales

live weight (tonnes) / value (million euros)



### Guadeloupe



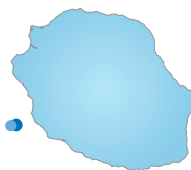
10 100 t / € 82 M

### Martinique



6 200 t / € 52

### Réunion



1 455 t / € 6 M

### French Guyana



3 933 t / € 16 M

# Sales of fishery products

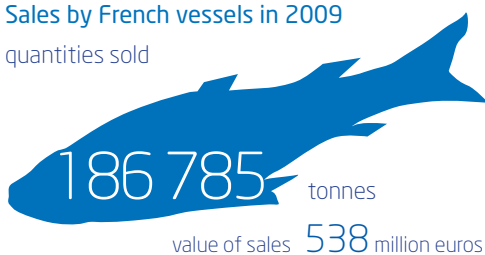
## Sales of fishery products at auction

Source: FranceAgriMer

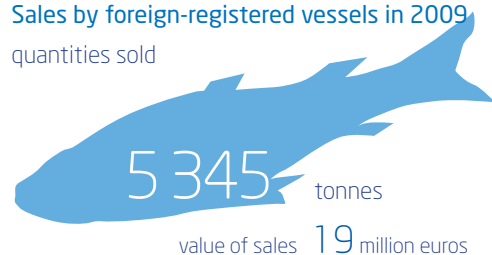
Number of auctions in 2009: 40



Sales by French vessels in 2009  
quantities sold



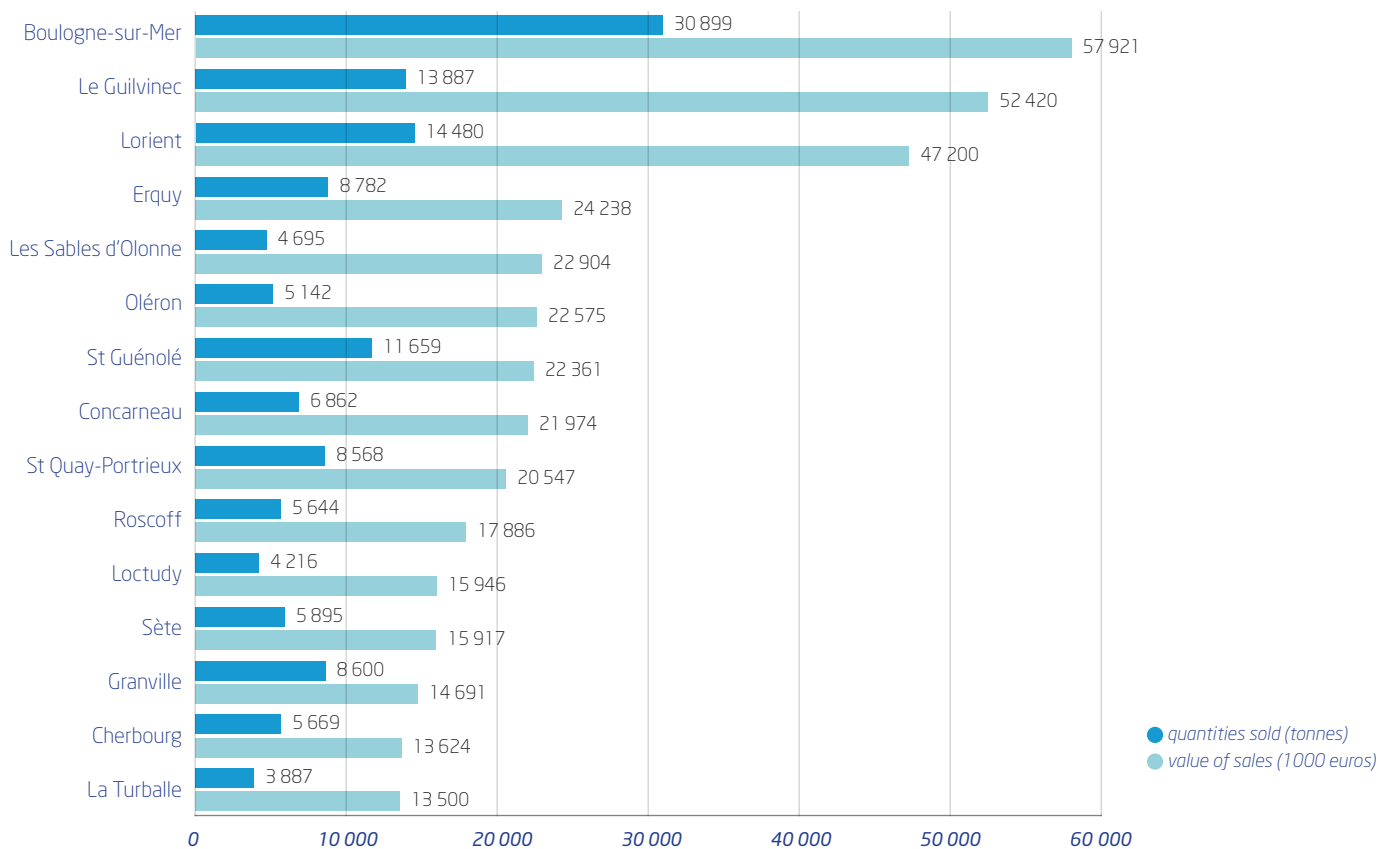
Sales by foreign-registered vessels in 2009  
quantities sold





## Quantities sold and value of sales by french vessels at the main auctions in 2009

Source : FranceAgriMer

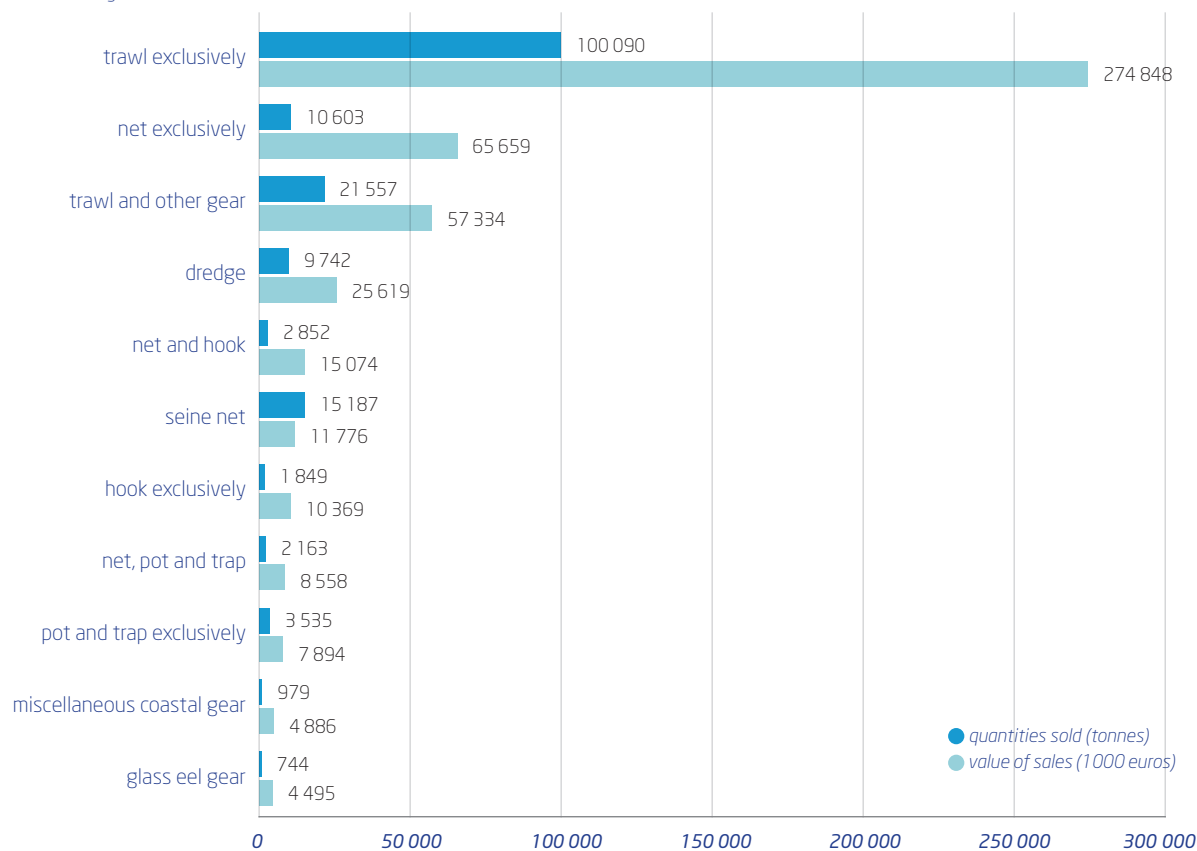




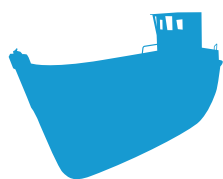
# Sales of fishery products

## Breakdown of quantities sold and value of sales at auction in 2009 by fleet segment <sup>(1)(2)</sup>

Source: FranceAgriMer / IFREMER



## Number of vessels (sales at auction in 2009)

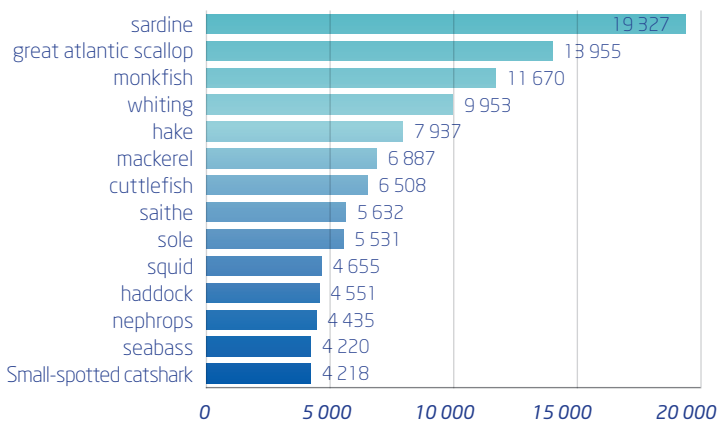


|                                   |              |
|-----------------------------------|--------------|
| <b>trawl exclusively</b>          | <b>508</b>   |
| <b>trawl and other gear</b>       | <b>451</b>   |
| <b>net exclusively</b>            | <b>353</b>   |
| <b>dredge</b>                     | <b>309</b>   |
| <b>net, pot and trap</b>          | <b>184</b>   |
| <b>glass eel gear</b>             | <b>161</b>   |
| <b>net and hook</b>               | <b>142</b>   |
| <b>hook exclusively</b>           | <b>141</b>   |
| <b>miscellaneous coastal gear</b> | <b>99</b>    |
| <b>pot and trap exclusively</b>   | <b>96</b>    |
| <b>seine net</b>                  | <b>31</b>    |
| <b>total</b>                      | <b>2 475</b> |

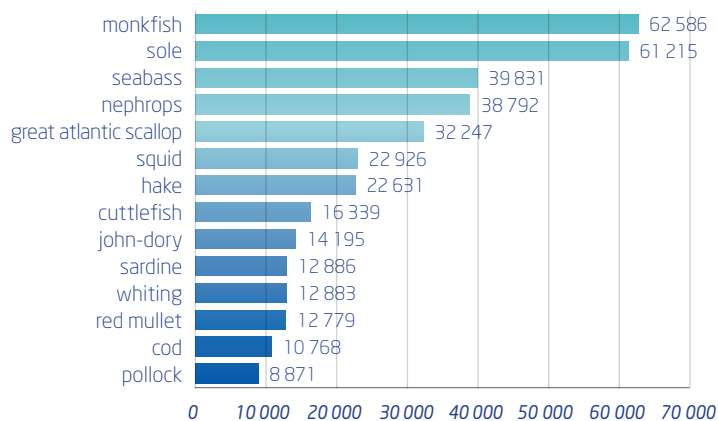
(1) breakdown by fleet segment based on main gear used by vessels according to the 2008 IFREMER SIH survey - (2) excluding Mediterranean sea

## Main species sold at auction by French vessels in 2009

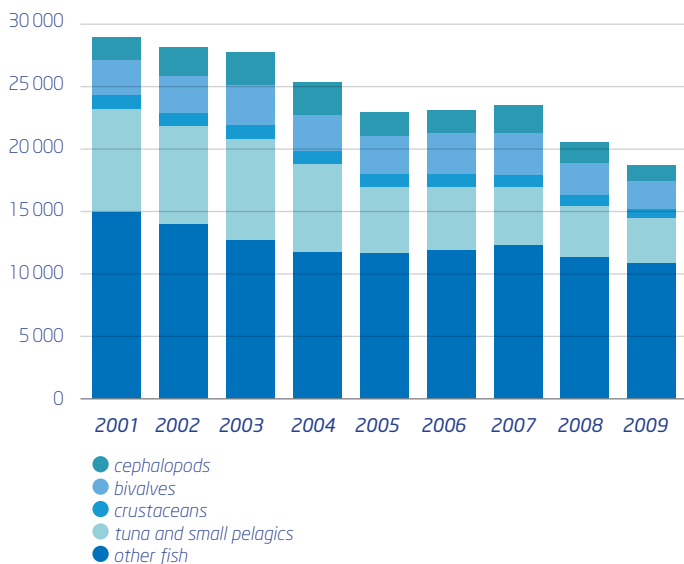
Quantities sold (tonnes)



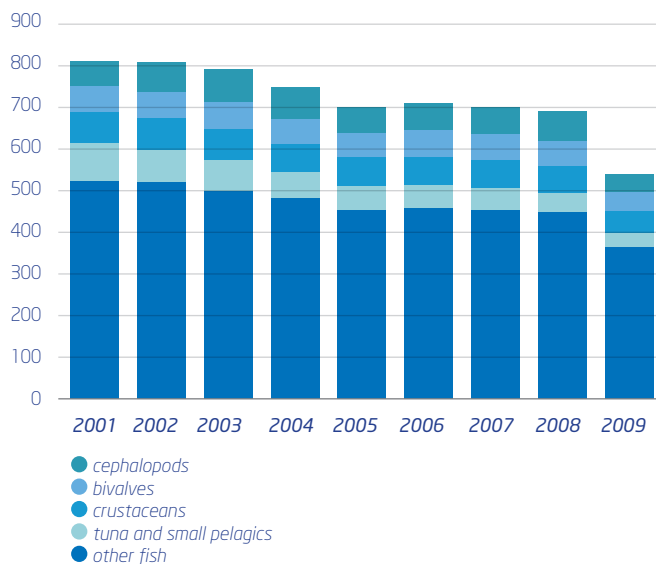
Value of sales (1 000 euros)



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



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

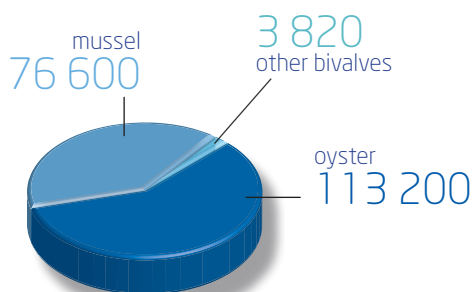


Source: FranceAgriMer

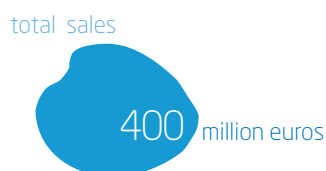
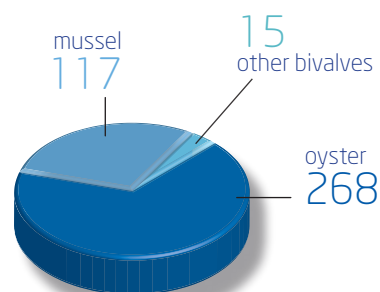
# Sales of aquaculture products in metropolitan France

## Shellfish farming

Quantities sold in 2007 (tonnes)<sup>(1)</sup>

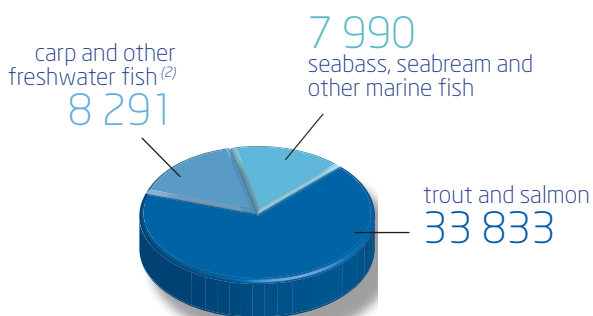


Value of sales in 2007 (million euros)

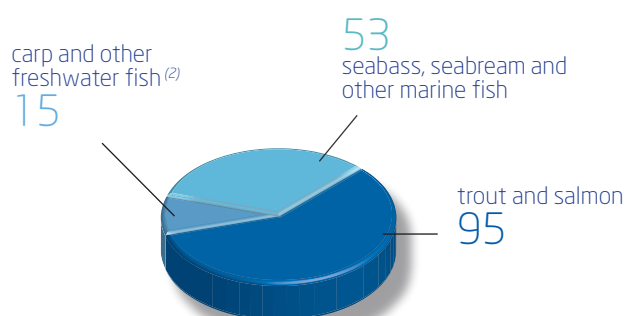


## Fish farming

Quantities sold in 2007 (tonnes)<sup>(1)</sup>



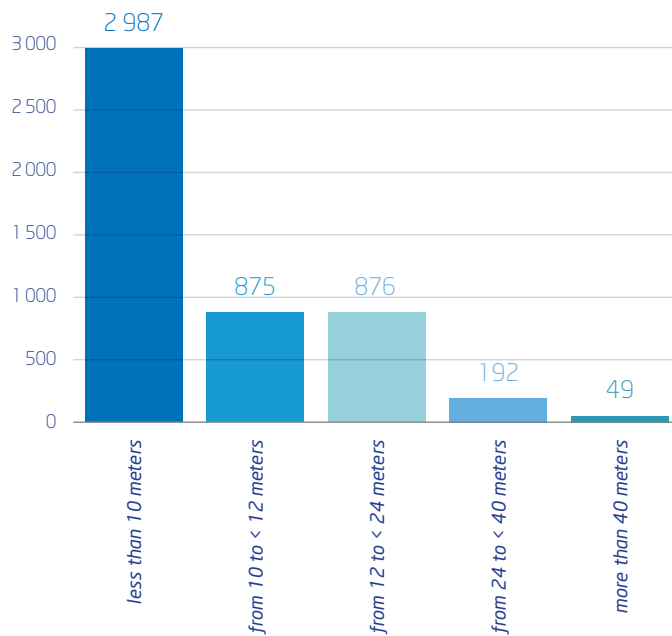
Value of sales in 2007 (million euros)



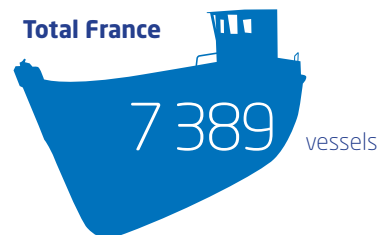
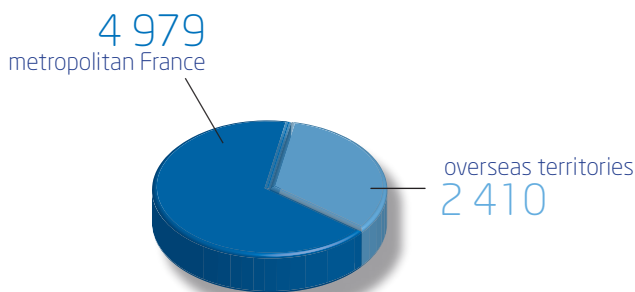
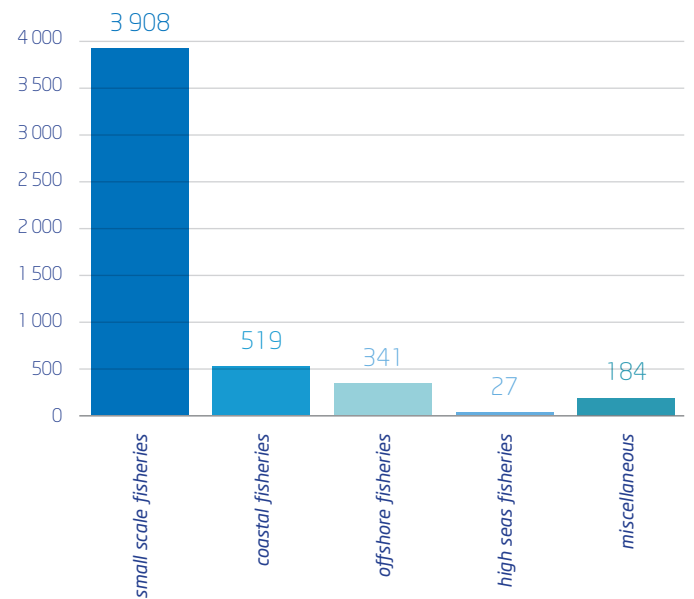
(1) live weight - (2) including farmed crustaceans - Source: DPMA

## Fishing fleet in 2008<sup>(1)</sup>

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

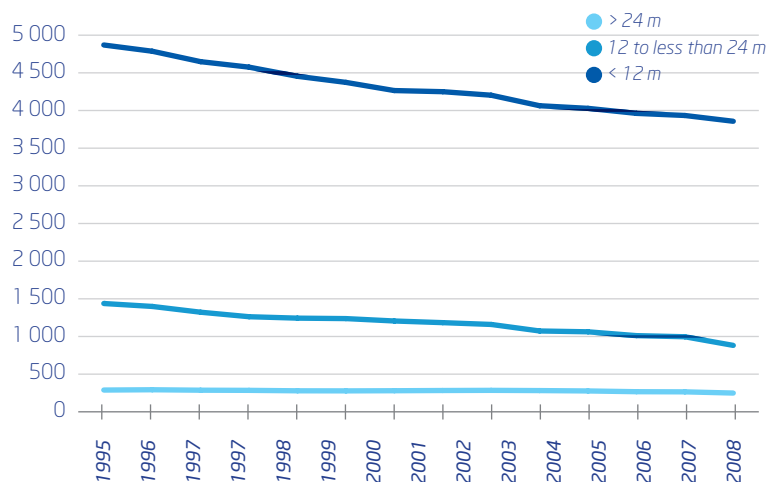
(1) excluding vessels engaged both in aquaculture and small scale fisheries - Source : SDSIM - Fichier BARPOP

# Fishing fleet / Aquaculture firms

## Fishing fleet <sup>(1)</sup>

Source : SDSIM - Fichier BARPOP

Changes in the number of fishing vessels in metropolitan France



|             | < 12 m | 12 to less than 24 m | > 24 m |
|-------------|--------|----------------------|--------|
| <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    |
| <b>2007</b> | 3 939  | 991                  | 257    |
| <b>2008</b> | 3 862  | 876                  | 241    |

## Aquaculture firms

Source : DPMA - aquaculture survey 2007

|  |       |
|--|-------|
| <b>shellfish farming (including seaweed and shrimps)</b> | 3 160 |
| <b>marine fish farming</b>                               | 39    |
| <b>salmonids farming</b>                                 | 456   |

(1) excluding vessels engaged both in aquaculture and small scale fisheries

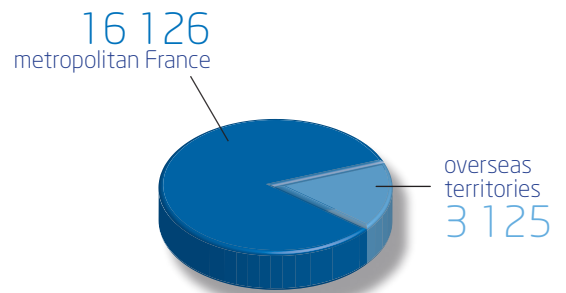
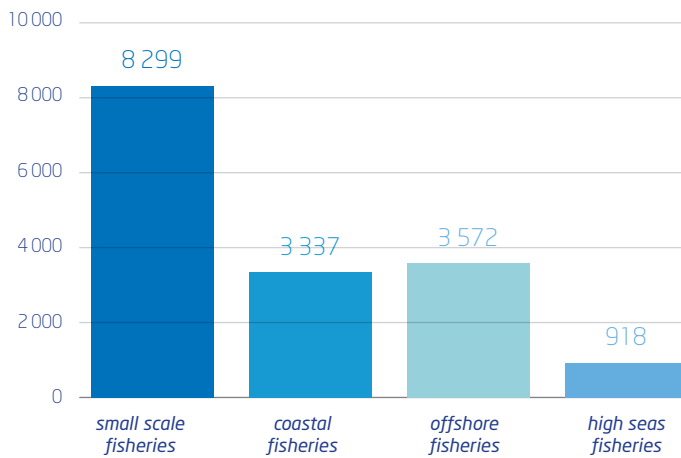


## Jobs

Number of seamen employed on board French fishing vessels in 2008 (seamen of all nationalities - excluding seamen in vessels engaged both in aquaculture and small scale fisheries)

Source: SDSIM

### metropolitan France



## Number of full time equivalent jobs

Source: Ifremer - SIH 2008 / DPMA - aquaculture survey 2007

|  |        |
|--|--------|
| <b>fishing in 2008</b>   | 10 840 |
| <b>shellfish farming (including seaweed and shrimps) in 2007</b> | 9 100  |
| <b>marine fish farming in 2007</b>                               | 430    |
| <b>salmonids farming in 2007</b>                                 | 1 490  |

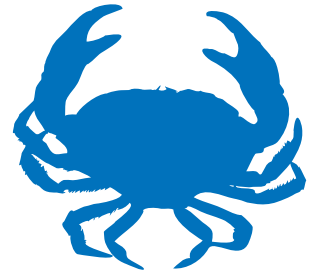
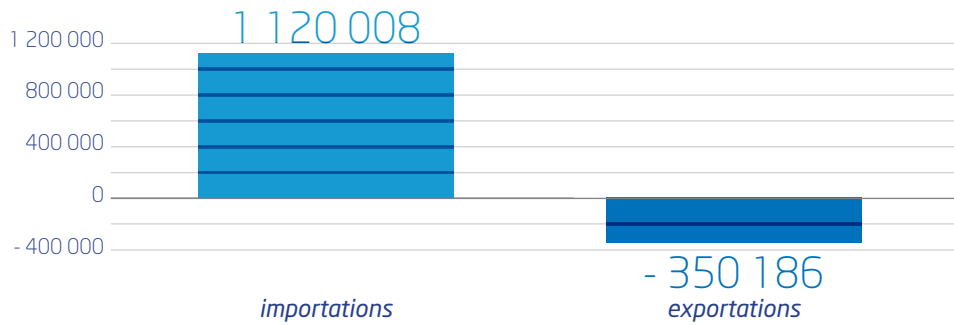
# Trade

imports / exports

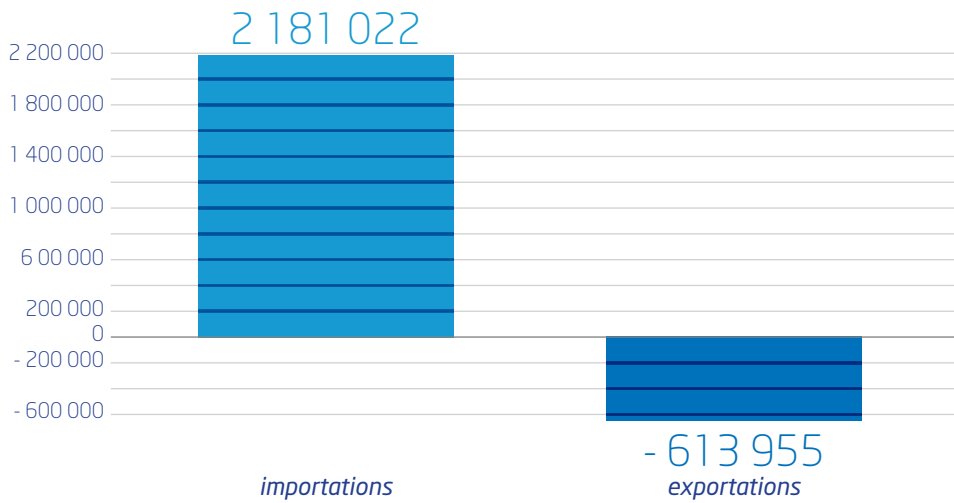
by presentation / by species / by geographical origine /  
main species



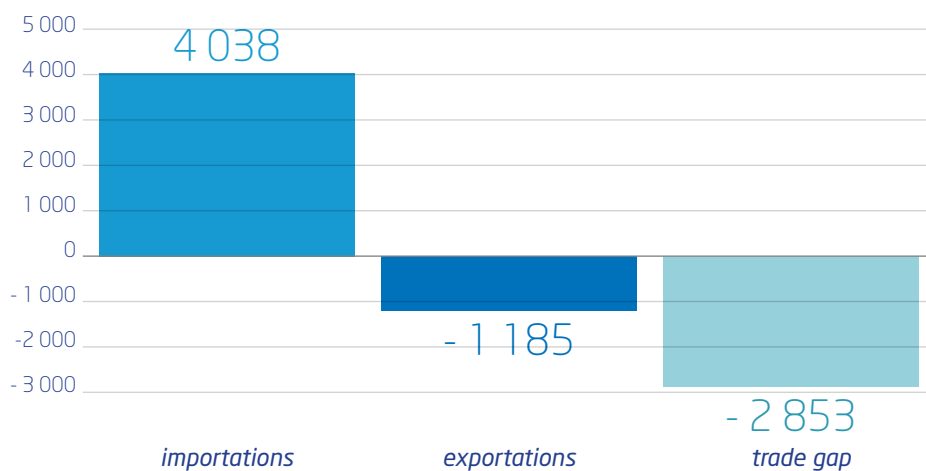
## Net weight (tonnes)



## Live weight (tonnes)



## Value (million euros)



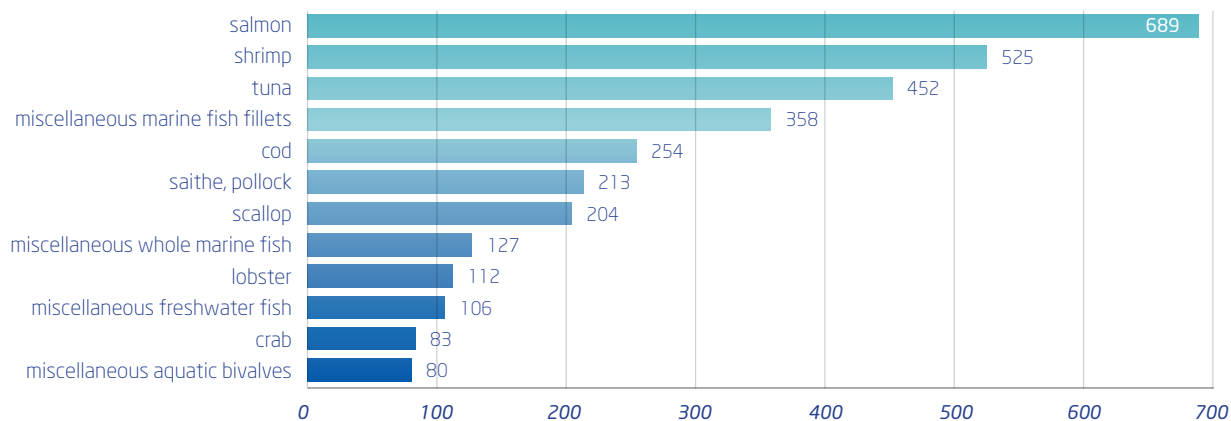
Source: French customs



# Imports and exports / metropolitan France and overseas territories

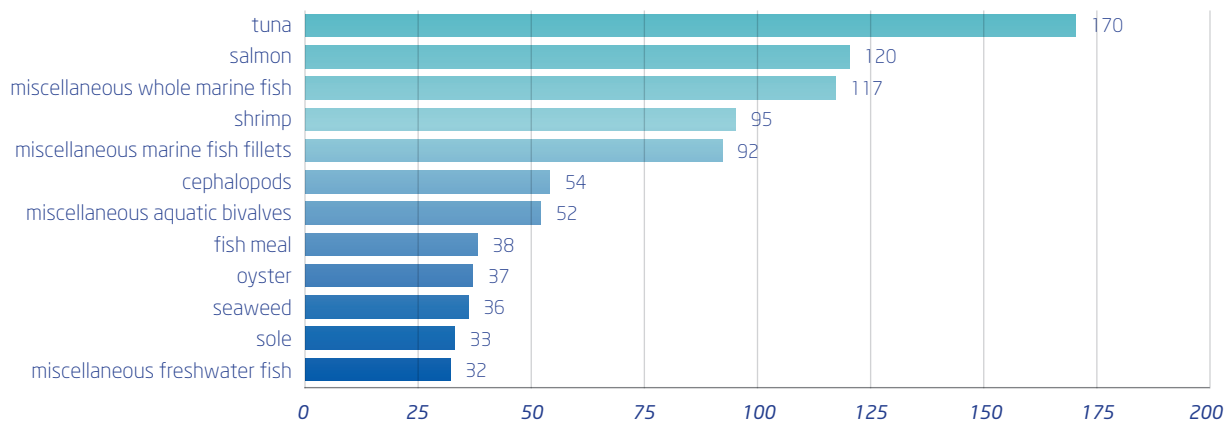
## Imports - main species in 2009

Value (million euros)



## Exports - main species in 2009

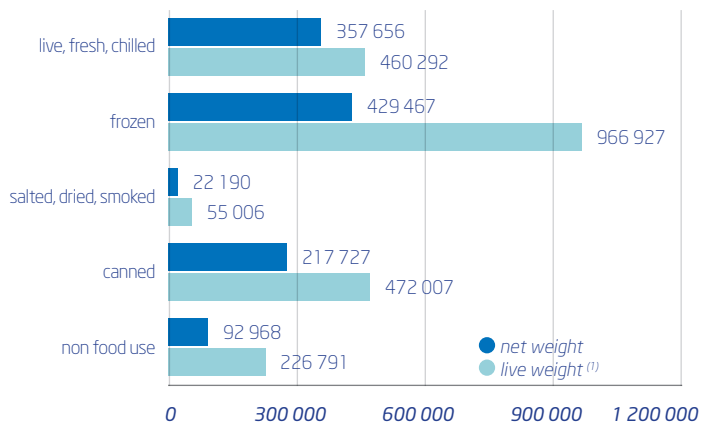
Value (million euros)



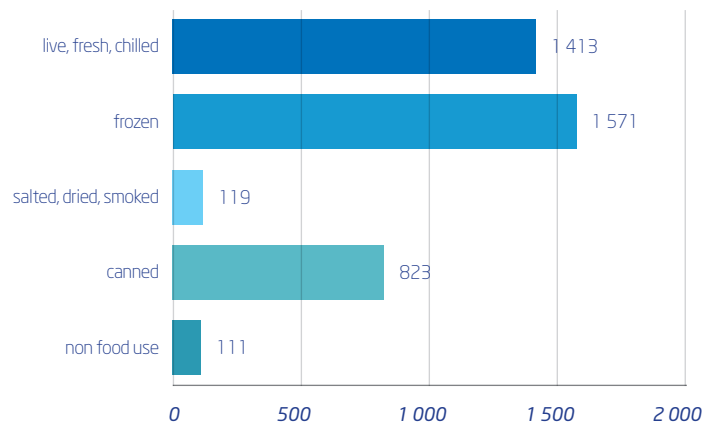
Source: French customs

## Imports by presentation in 2009

Imports by volume (tonnes)

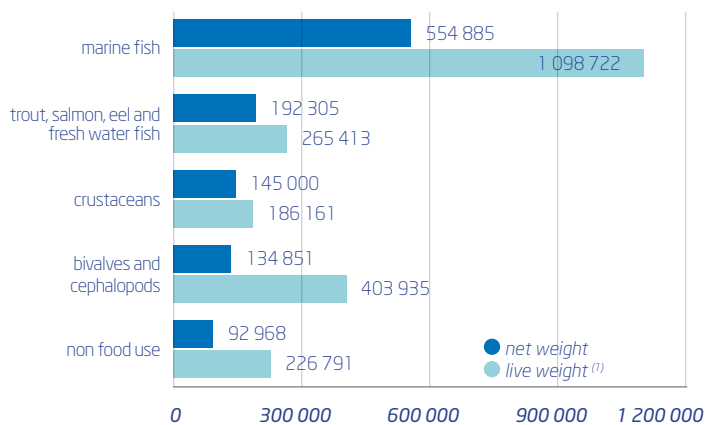


Imports by value (million euros)

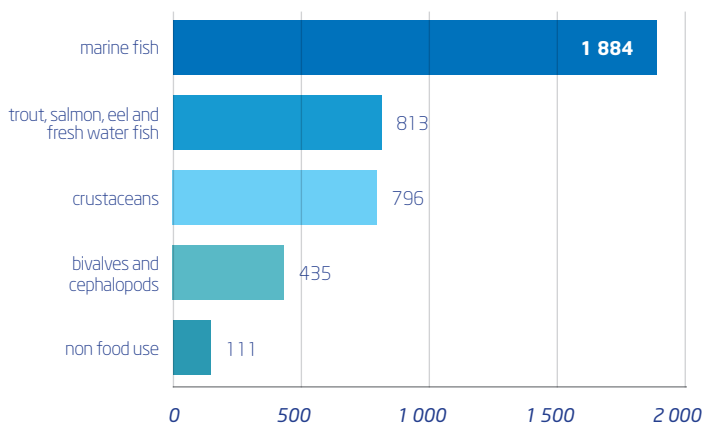


## Imports by species group in 2009

Imports by volume (tonnes)



Imports by value (million euros)

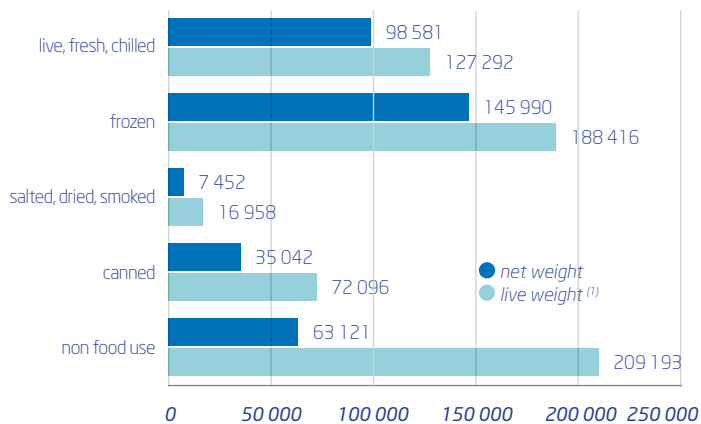


(1) data collection methodology is detailed on inside back cover - Source : French customs

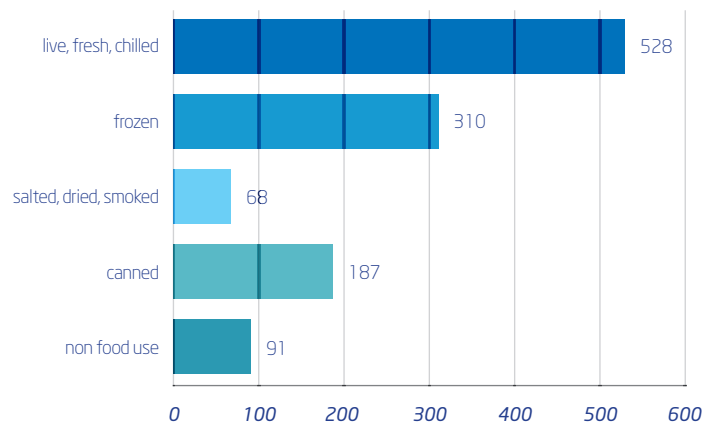
# Imports and exports / metropolitan France and overseas territories

## Exports by presentation in 2009

Exports by volume (tonnes)

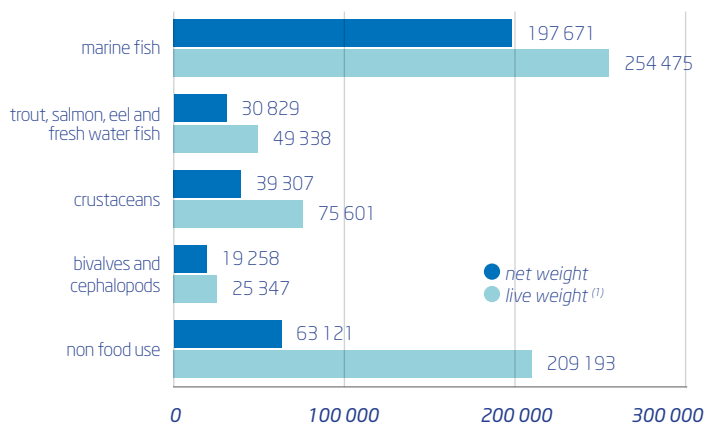


Imports by value (million euros)

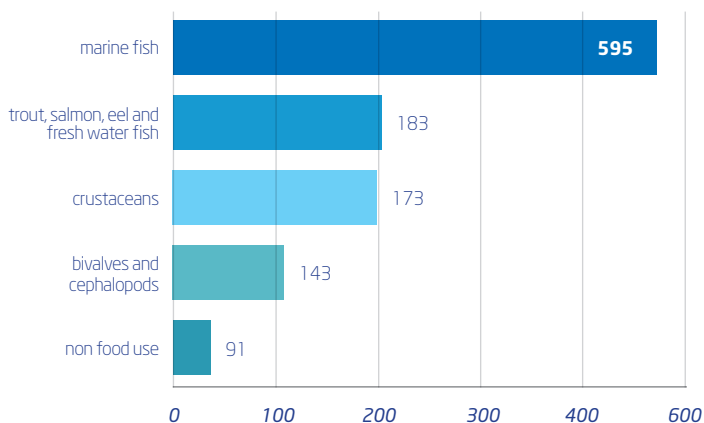


## Exports by species group in 2009

Exports by volume (tonnes)



Imports by value (million euros)

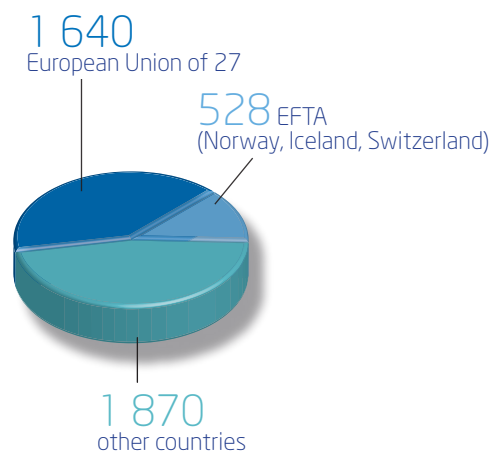
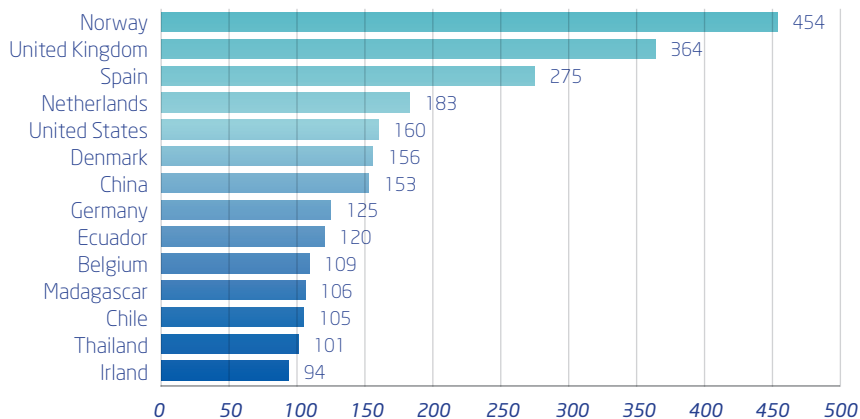


(1) data collection methodology is detailed on inside back cover - Source : French customs

# Imports and exports / metropolitan France and overseas territories

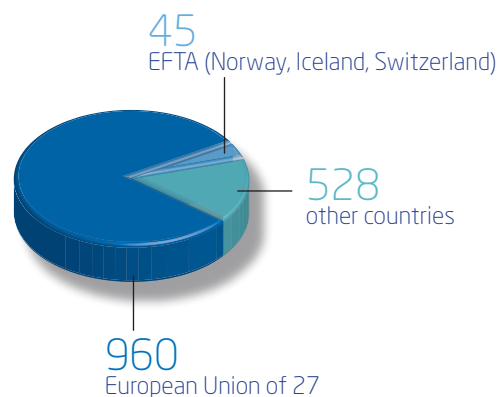
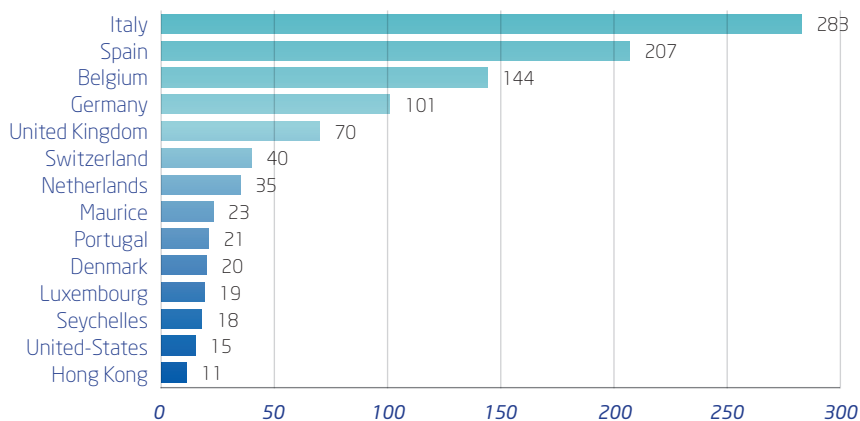
## Imports of aquatic products by geographical origin in 2009

Value (million euros)



## Exports of aquatic products by destination in 2009

Value (million euros)



Source: French customs

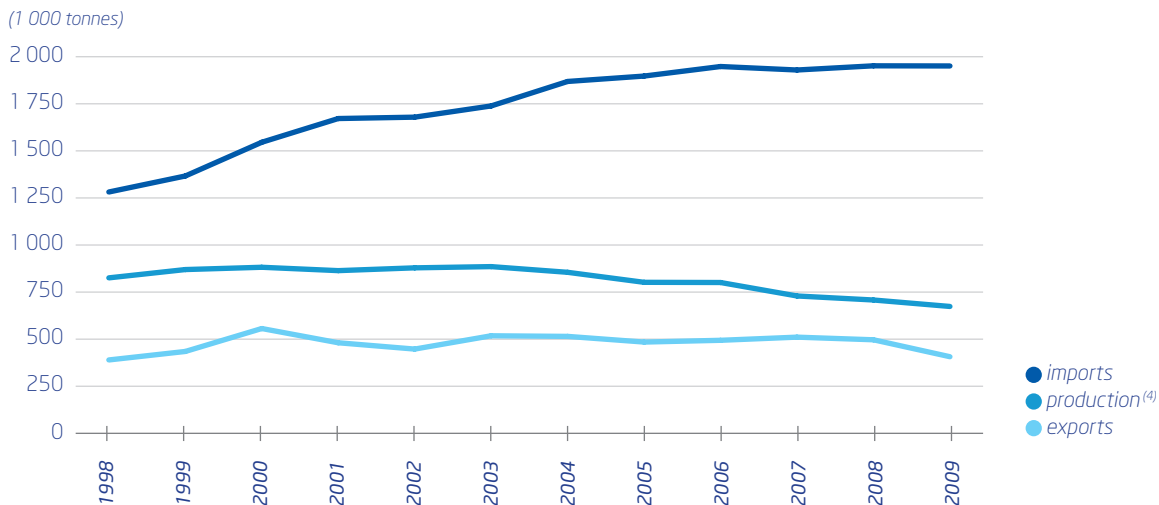
# Consumption

supply balance / purchases

household / catering / breakdown of purchases by distribution channel

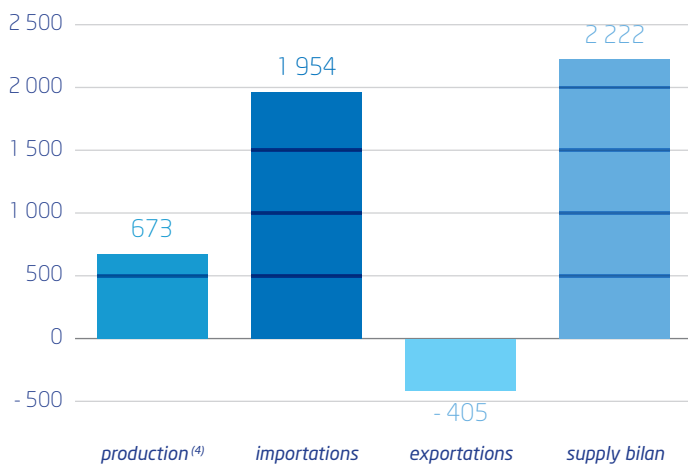


## Balance changes in production, imports and exports <sup>(2)(3)</sup>

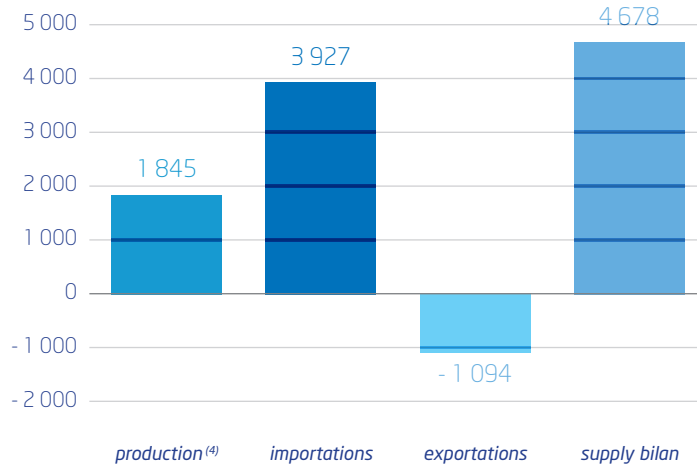


## Supply balance in 2009 <sup>(2)(3)</sup>

in quantity (1 000 tonnes)



in value (million euros)

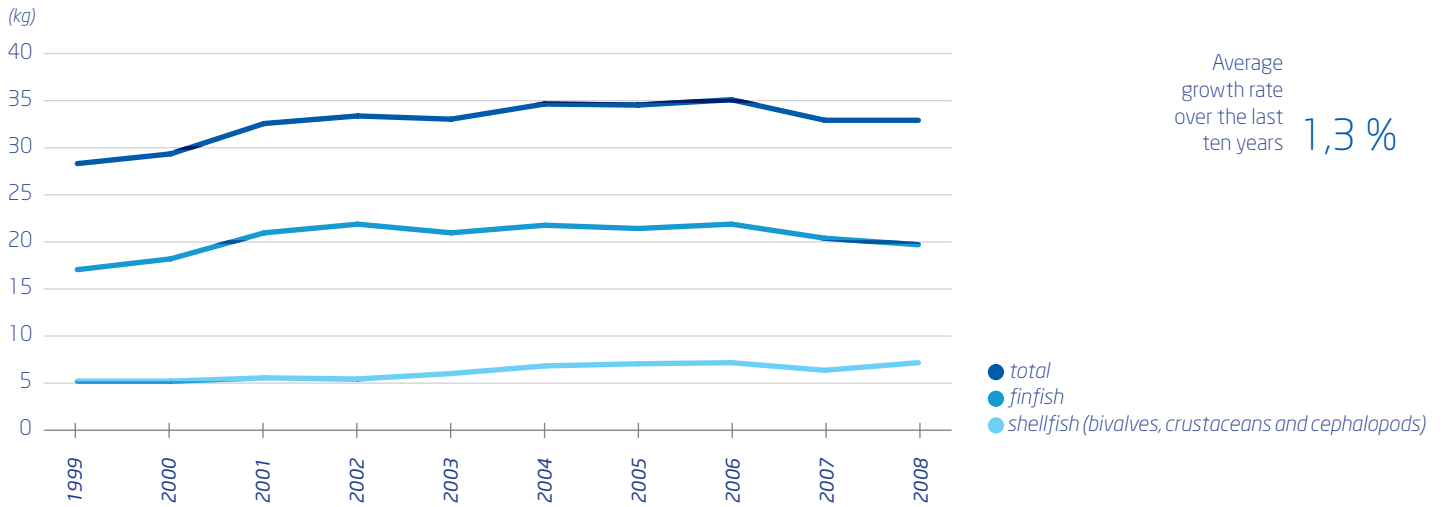


(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) excluding non food use - (4) estimation 2009 - Source : FranceAgriMer

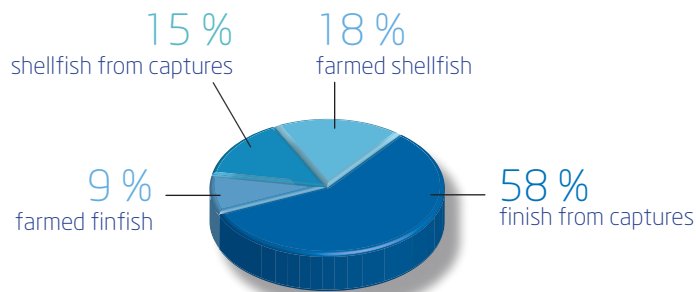
# Supply balance <sup>(1)</sup>



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



## Average 2006-2008 <sup>(2)</sup>



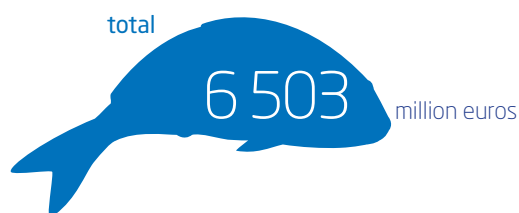
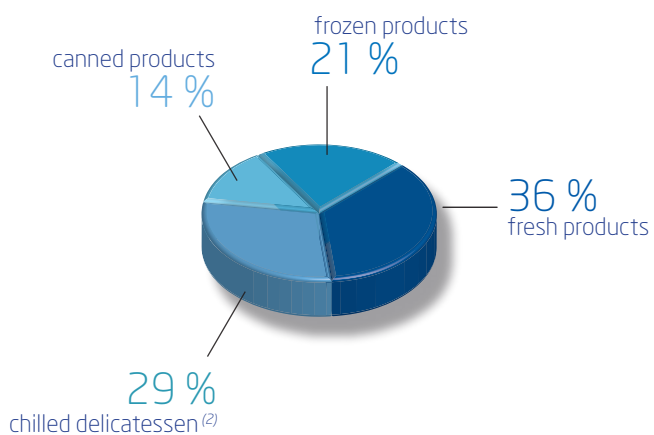
## Average annual consumption per capita



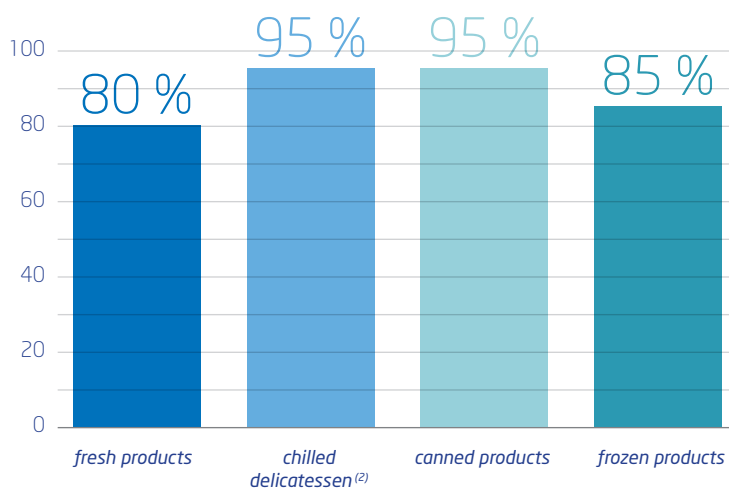
(1) data collection methodology is detailed on inside back cover - (2) live weight - Source : FranceAgriMer



## Household spending in 2009



## Percentage of purchasing households in 2009<sup>(3)</sup>



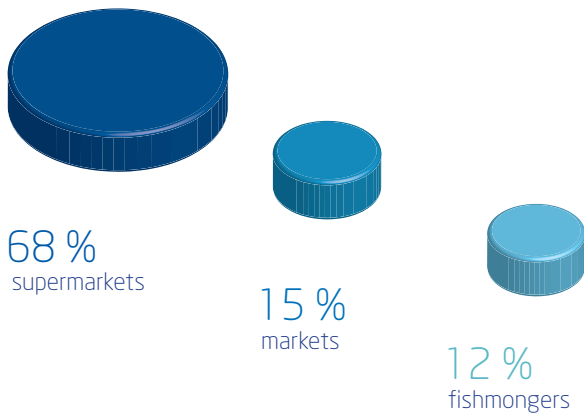
(1) data collection methodology is detailed on inside back cover - (2) with bar code - (3) a purchasing household buy the product at least once a year



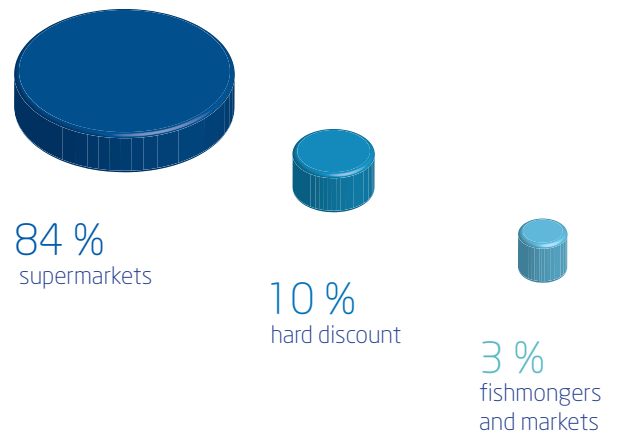
# Purchases by French households for home consumption <sup>(1)</sup>

## Purchases of aquatic products by french households for home consumption in 2009

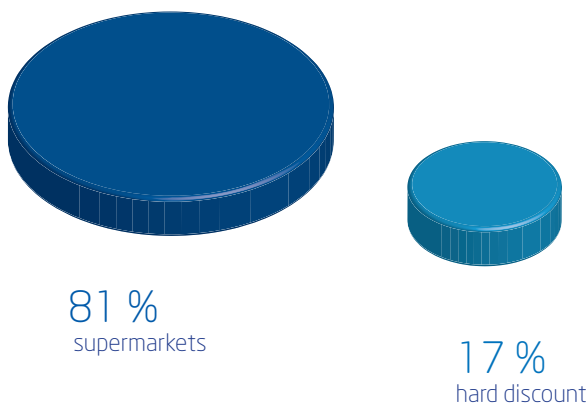
### Fresh products



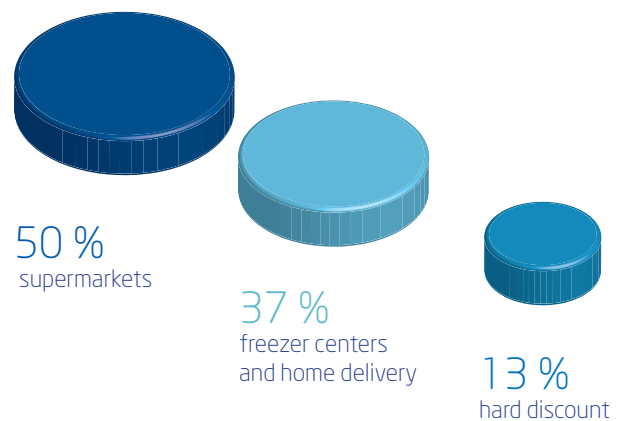
### Chilled delicatessen



### Canned products



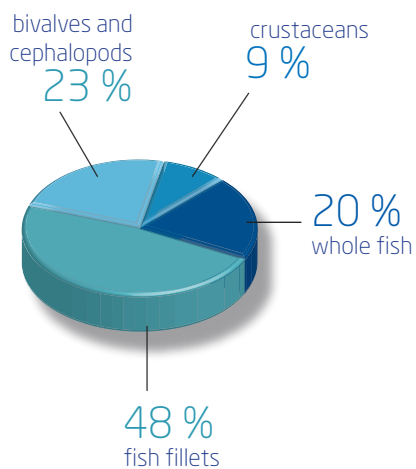
### Frozen products



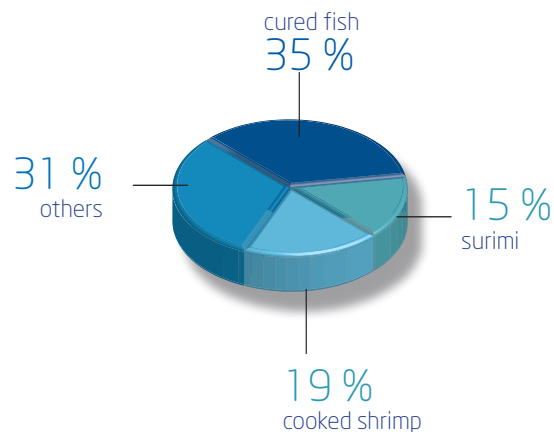
(1) data collection methodology is detailed on inside back cover - Source : FranceAgriMer / Kantar Worldpanel

## Breakdown of expenditures by presentation and species group in 2009

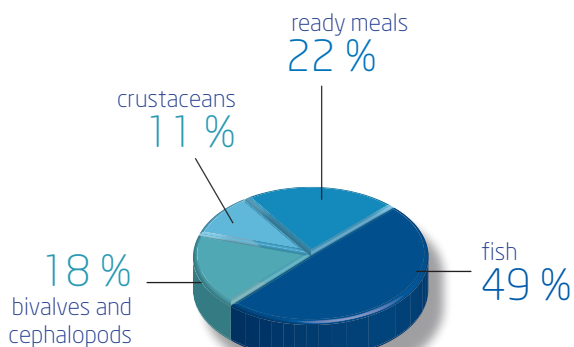
### Fresh products



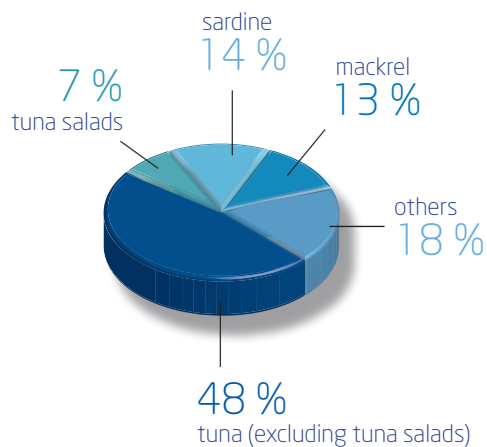
### Chilled delicatessen



### Frozen products



### Canned products

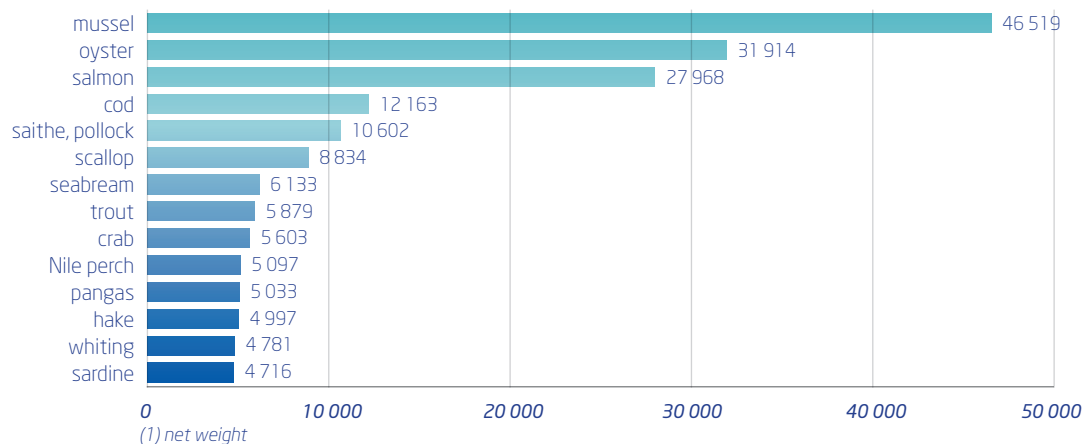


(1) data collection methodology is detailed on inside back cover - Source : FranceAgriMer / Kantar Worldpanel

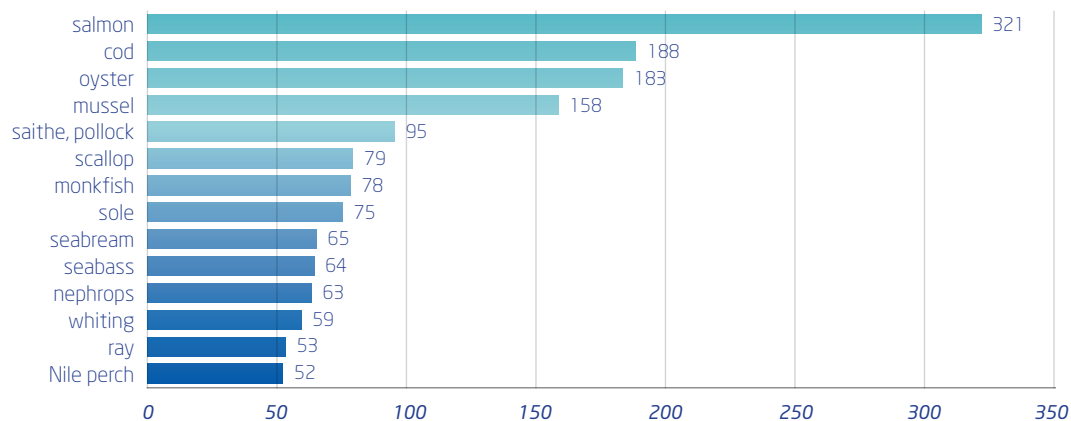
# Purchases by French households for home consumption in 2009<sup>(1)</sup>

## Main species purchased fresh in 2009

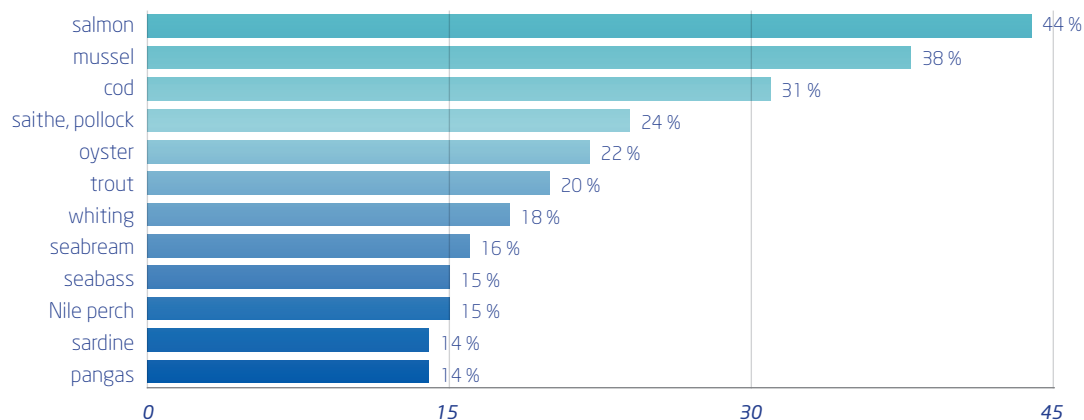
tonnes<sup>(2)</sup>



million euros



percentage of purchasing households

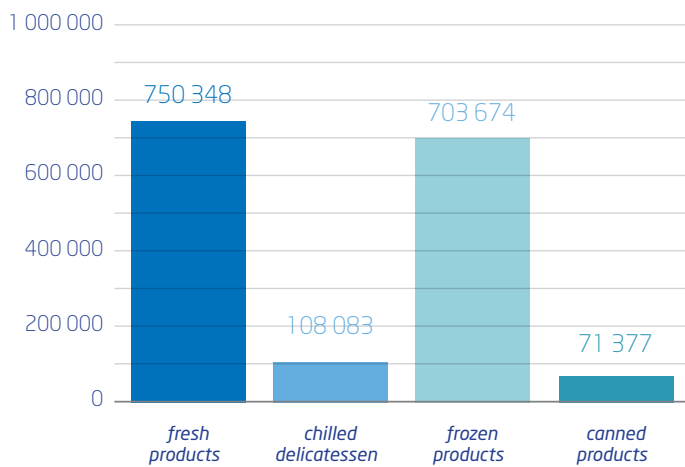


(1) data collection methodology is detailed on inside back cover - (2) net weight - Source : FranceAgriMer / Kantar Worldpanel

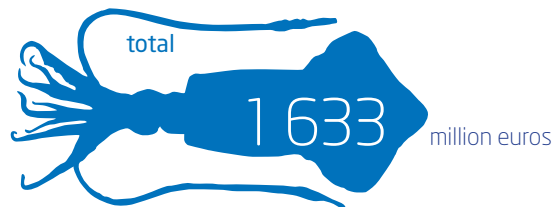
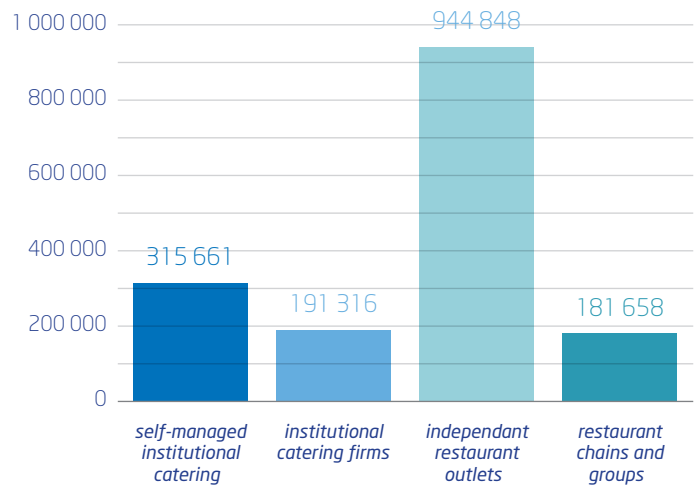


## Spending in 2009

by presentation (1,000 euros)



by catering outlet type (1,000 euros)

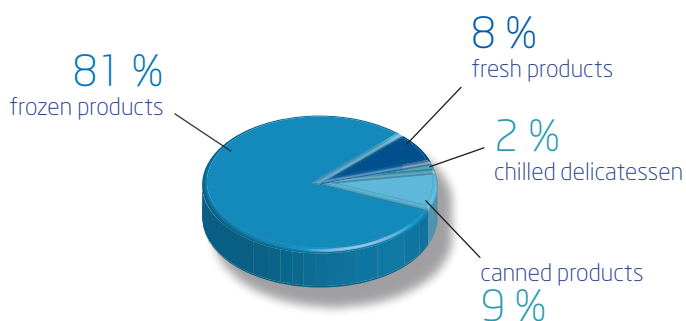


Source: FranceAgriMer / GIRA Foodservice

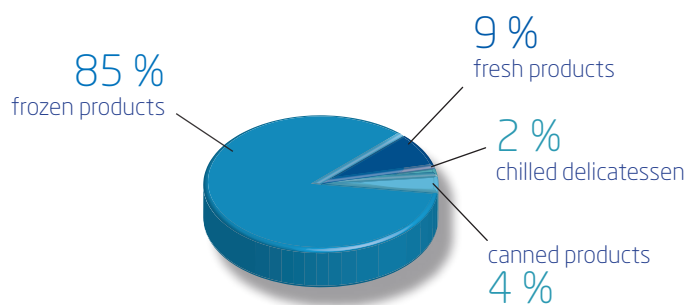
# Purchases of aquatic products by the catering sector

## Spending by catering outlet and by presentation in 2009

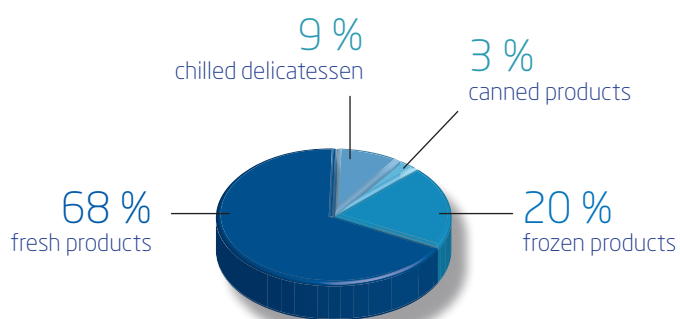
### self-managed institutional catering



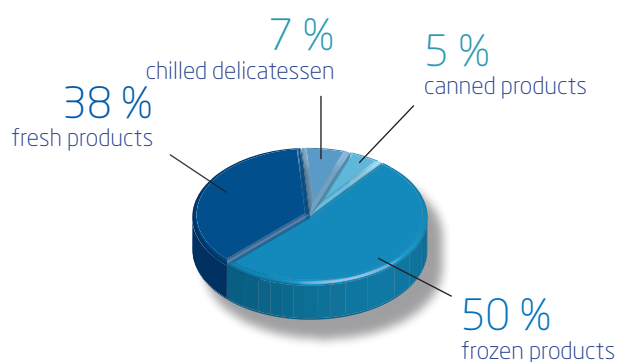
### institutional catering firms



### independant restaurant outlets



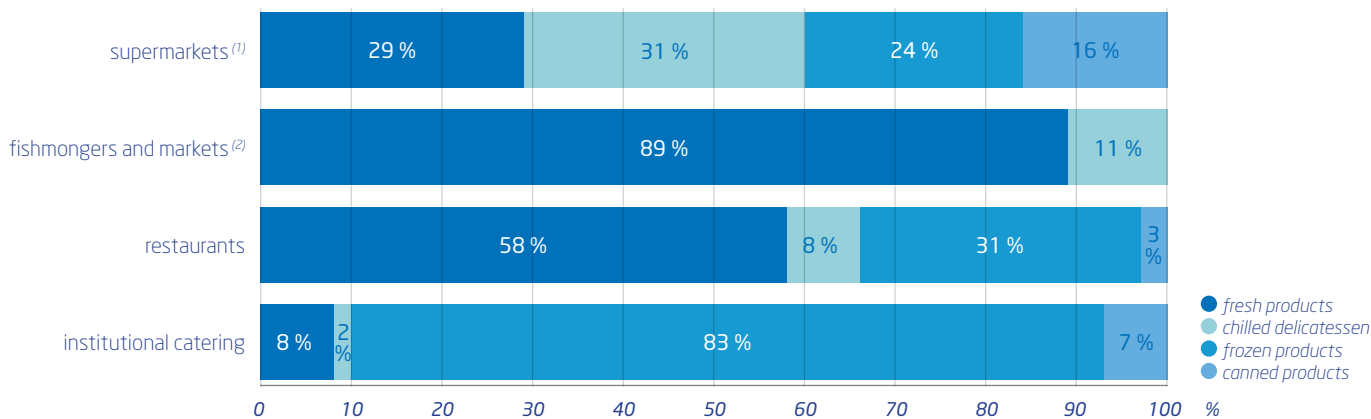
### restaurant chains and groups



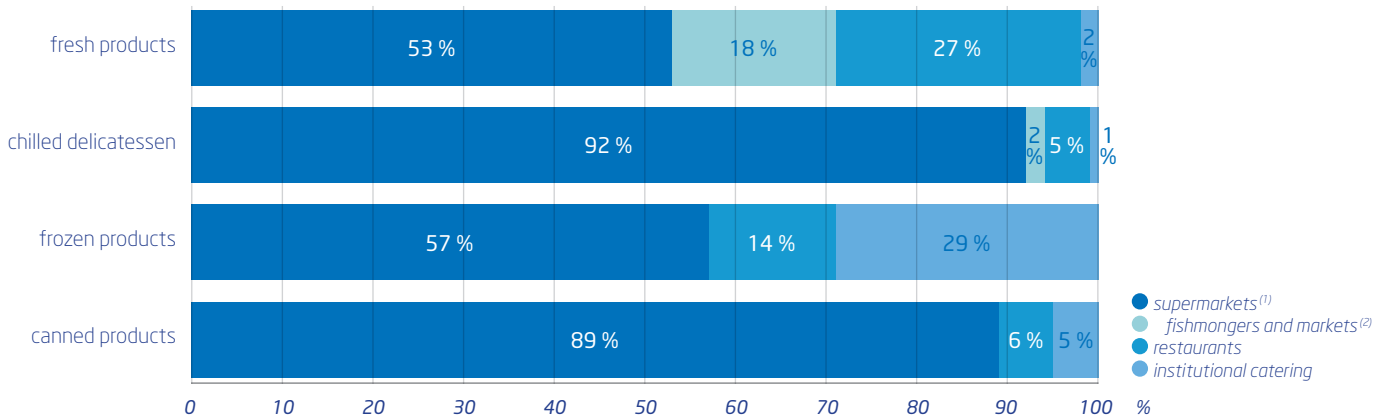
Source: FranceAgriMer / GIRA Foodservice

# Breakdown of purchases by distribution channel

Breakdown of purchases by presentation for different outlets (value)



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



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

Source : Kantar Worldpanel et GIRA Foodservice for FranceAgriMer

## Data collection methodology

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**Data** Included data are the last available in april 2010.

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

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**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 %.

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

- Bilan annuel FranceAgriMer 2009 des ventes déclarées en halles à marée
  - Bilan annuel FranceAgriMer / DPMA 2008 de la production de la pêche et de l'aquaculture
  - Bilan annuel FranceAgriMer 2009 du commerce extérieur des produits de la pêche et de l'aquaculture
  - Bilan annuel FranceAgriMer 2009 de la consommation des produits de la pêche et de l'aquaculture
- 

**DPMA** Direction des Pêches maritimes et de l'aquaculture du ministère de l'Alimentation 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

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

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