

>>> Fisheries and aquaculture

Key figures FranceAgriMer

> April 2019

The fisheries and aquaculture sector in France

Production
Firms
Trade
Consumption



SUMMARY



Production **page 3**

France in the EU-28 & in the world in 2016
Total sales of fisheries and aquaculture products
Sales of fisheries products at auction
Sales of aquaculture products
Fishing fleet
Aquaculture firms
Jobs



Firms **page 15**

Fishmonger firms
Trading firms
Processing firms



Trade **page 19**

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



Consumption **page 25**

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

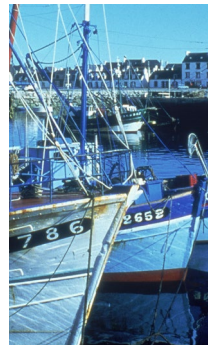
PRODUCTION

fishing fleet /

aquaculture firms / jobs

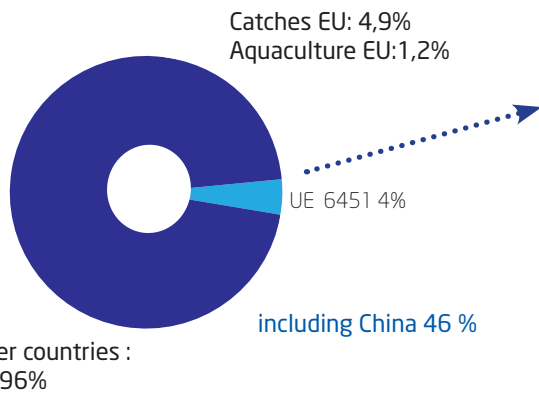
total sales of fisheries and aquaculture products





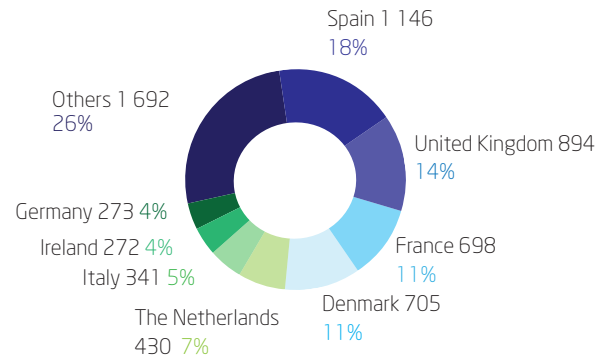
Production / landings and aquaculture

France in the EU-28 and in the world in 2016



Source : FAO

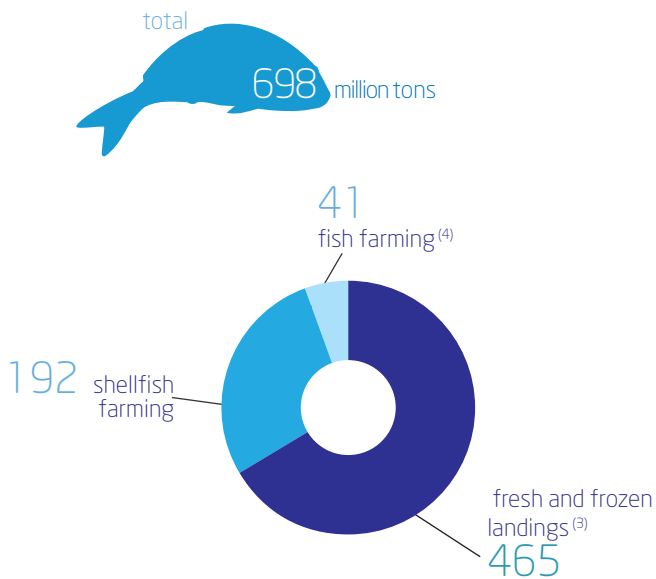
in 1000 tons and % of total



Source : Eumofa

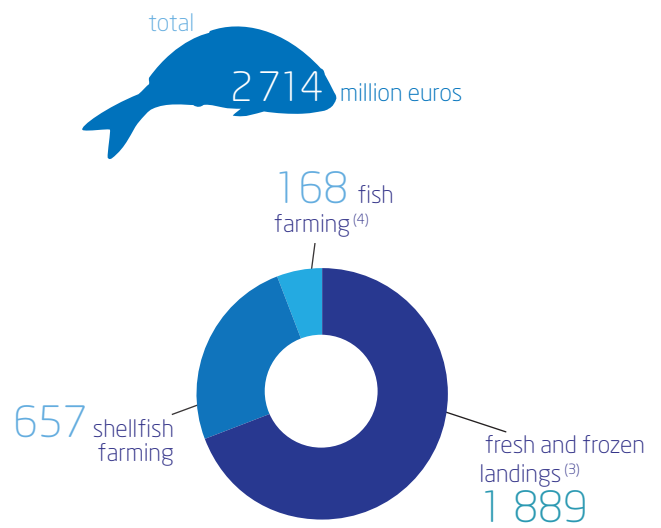
Quantities sold in 2016 ⁽¹⁾

by method of production (million tons) ⁽²⁾



Value of sales in 2016 ⁽²⁾

by method of production (million euros)



(1) excluding seaweeds - (2) equivalent live weight - (3) total sales to processing industry and export sales

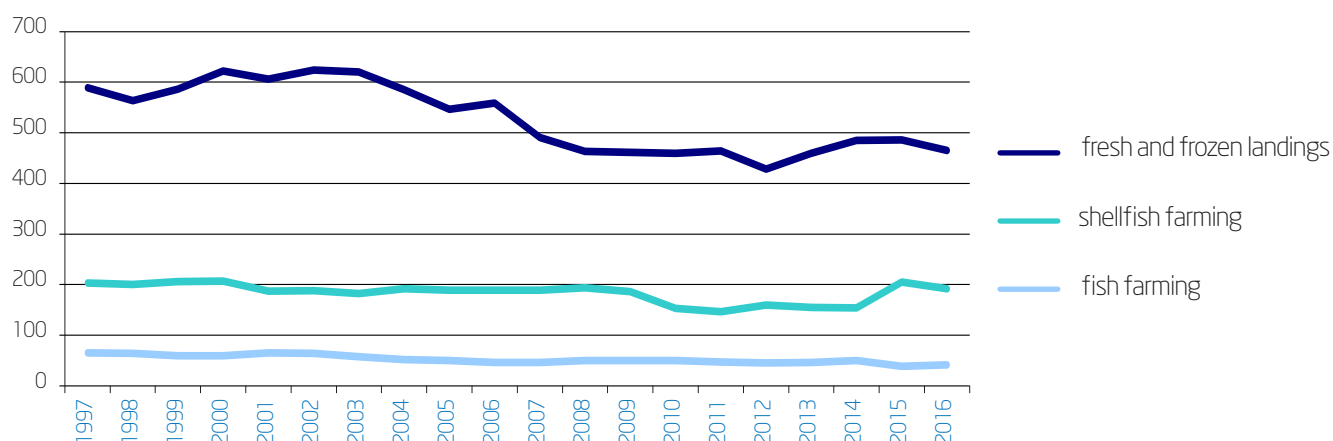
(4) including farmed crustaceans

Source : MAA /DPMA/Eumofa

Total sales / metropolitan France and overseas territories

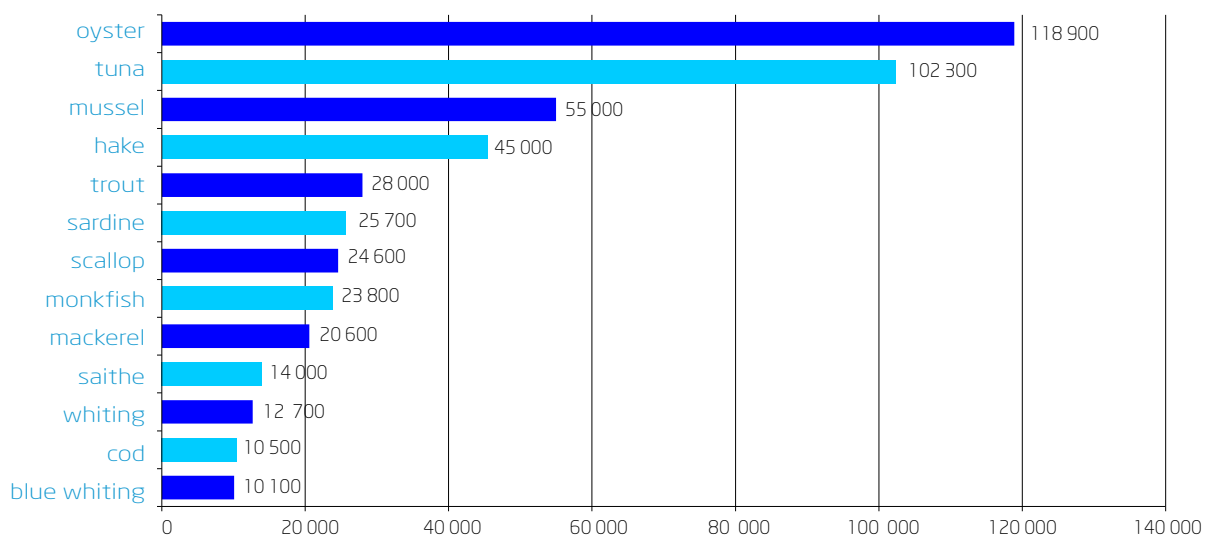
Changes in quantities sold in metropolitan France ⁽¹⁾

(1 000 tons) ⁽³⁾



Main species sold in 2016 ⁽²⁾⁽³⁾

tons

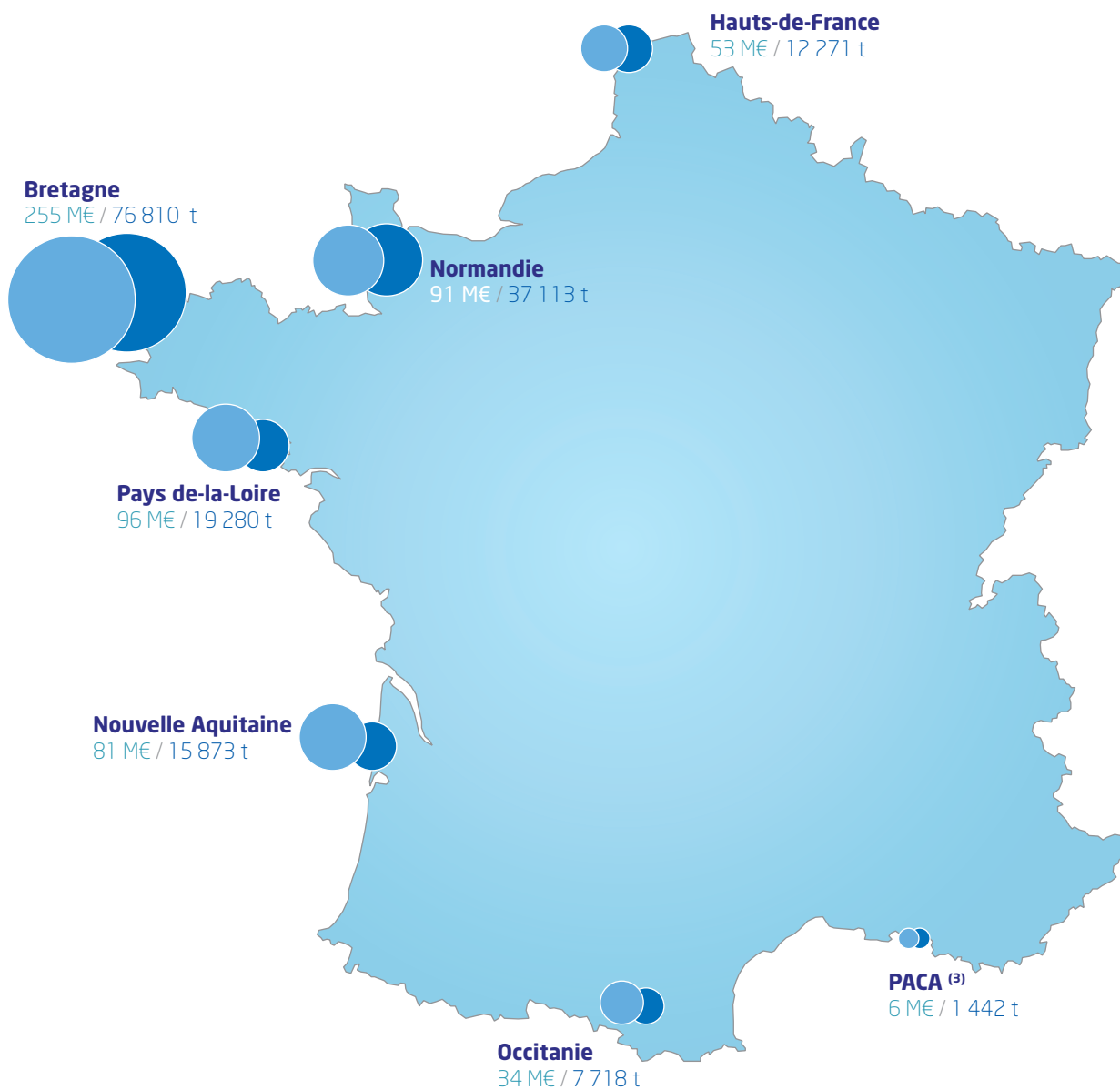


(1) excluding seaweeds - (2) equivalent live weight - (3) sales, sales to processing industry and export sales
Source : MEEM / CGDD / SOeS

Fresh and frozen landings in 2018⁽¹⁾

Sales

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



(1) excluding seaweeds and freshwater fishing - (2) equivalent live weight - (3) Sales without auction - VISIOMer

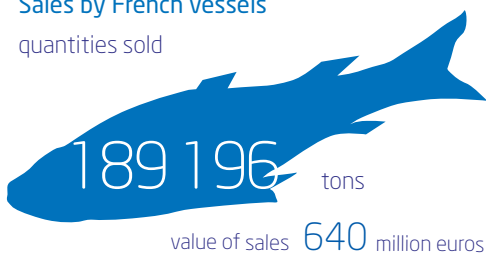
Source : VISIOMer/FranceAgriMer

Sales of fishery products at auction in 2018

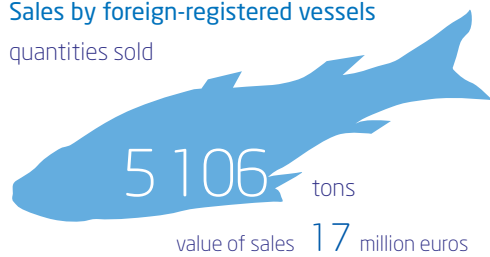
Number of auctions: 37



Sales by French vessels
quantities sold

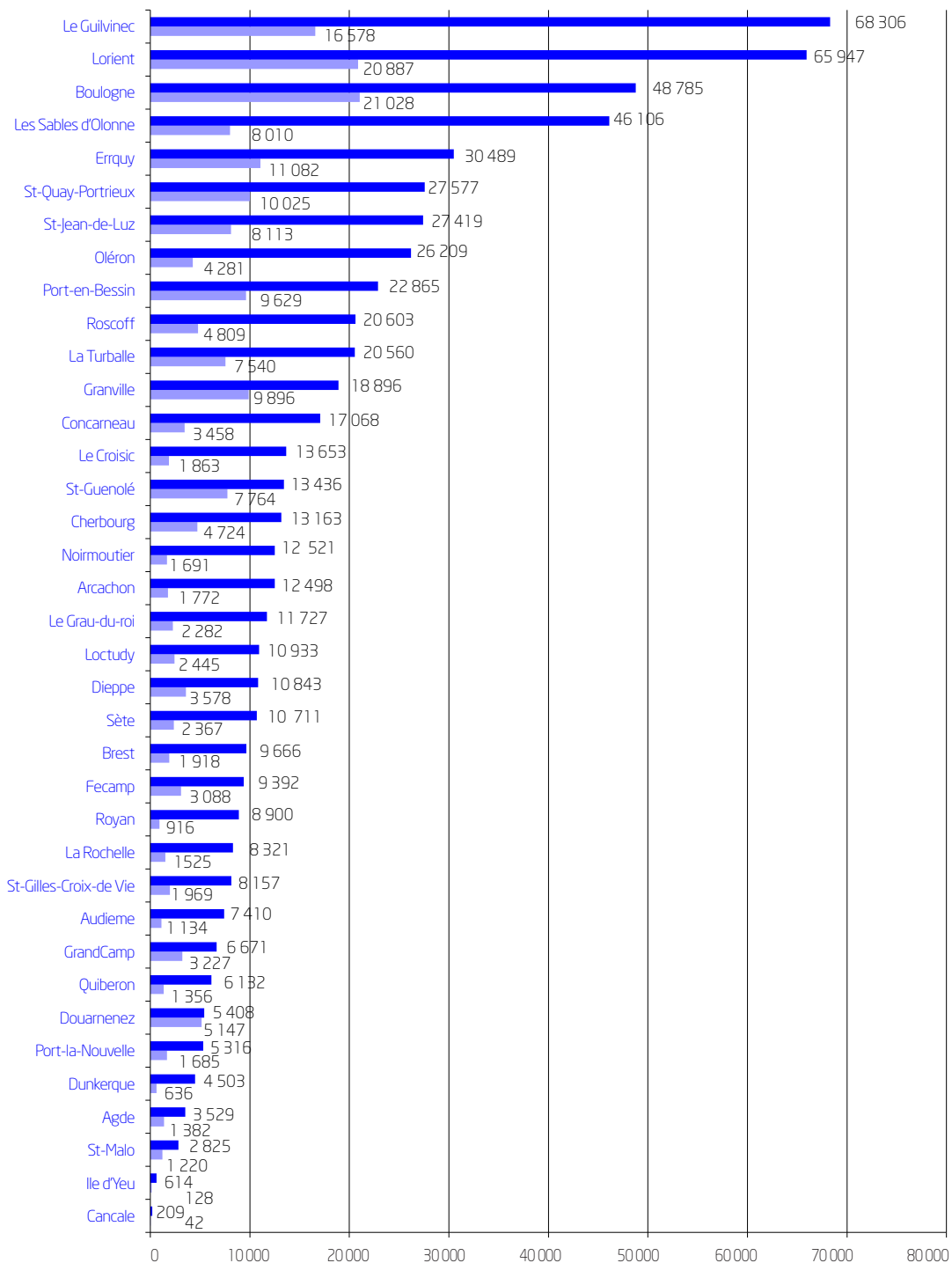


Sales by foreign-registered vessels
quantities sold



Source : VISIOMer/ FranceAgriMer

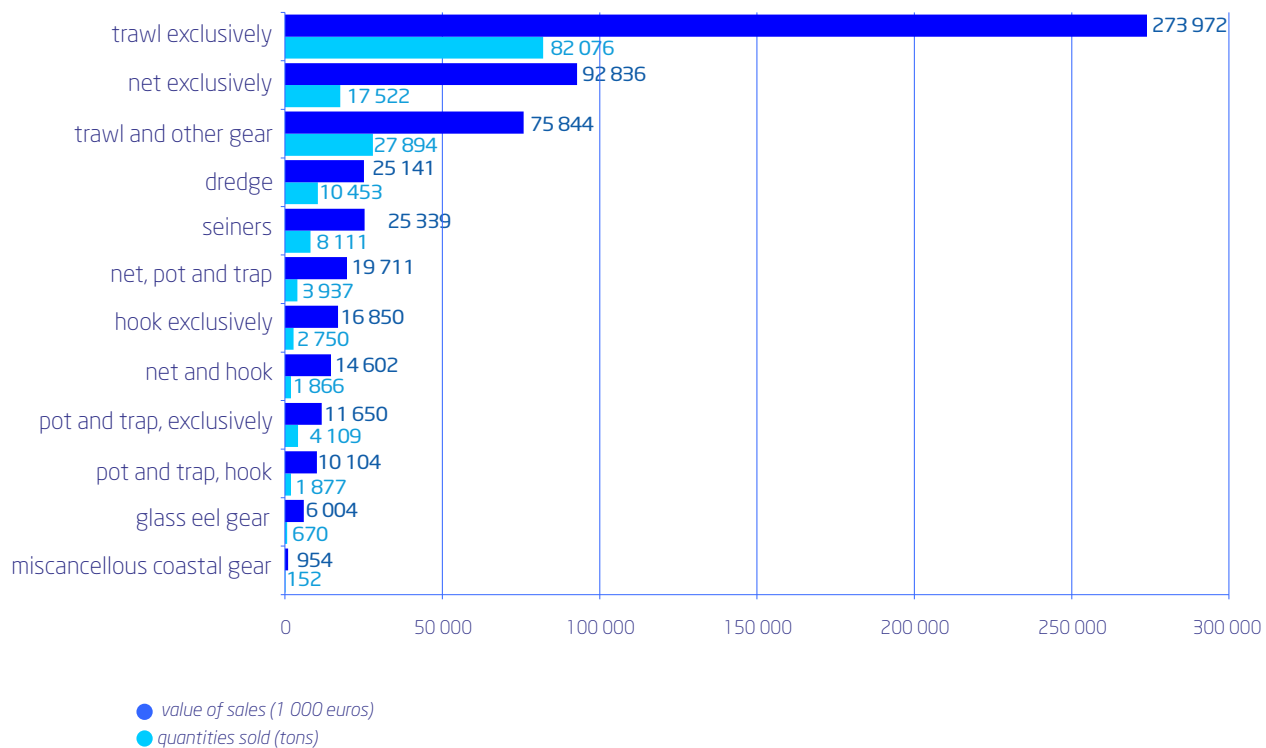
Quantities sold and value of sales by french vessels at the main auctions in 2018



Source: VISIOMer/ FranceAgriMer

● quantities sold (tons)
● value of sales (1 000 euros)

Breakdown of quantities sold and value of sales at auction in 2018 by fleet segment ⁽¹⁾⁽²⁾⁽³⁾



Number of vessels (sales at auction in 2018) ⁽¹⁾⁽²⁾⁽³⁾

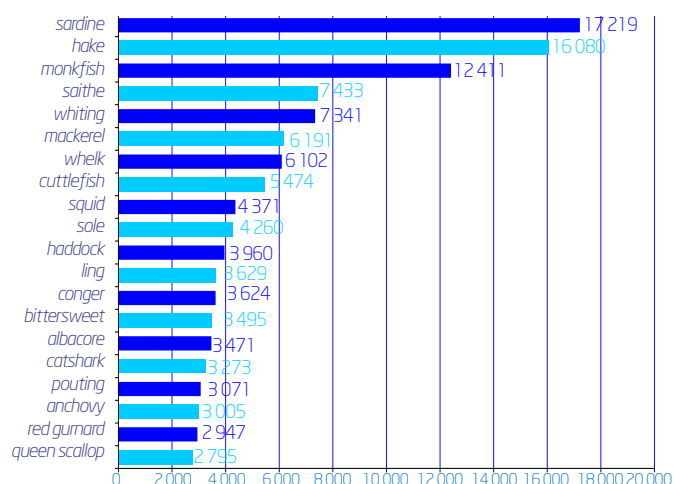
trawl and other gear	437
trawl exclusively	403
net exclusively	320
dredge	259
net, pot and trap	253
pot and trap exclusively	220
hook exclusively	178
glass eel gear	130
pot and trap, hook	108
net and hook	98
miscellaneous coastal gear	80
seiners	63
total	2 549

(1) breakdown by fleet segment based on main gear used by vessels according to the 2017 Ifremer SIH survey - (2) excluding Mediterranean sea - (3) unspecified and inactives are not considered

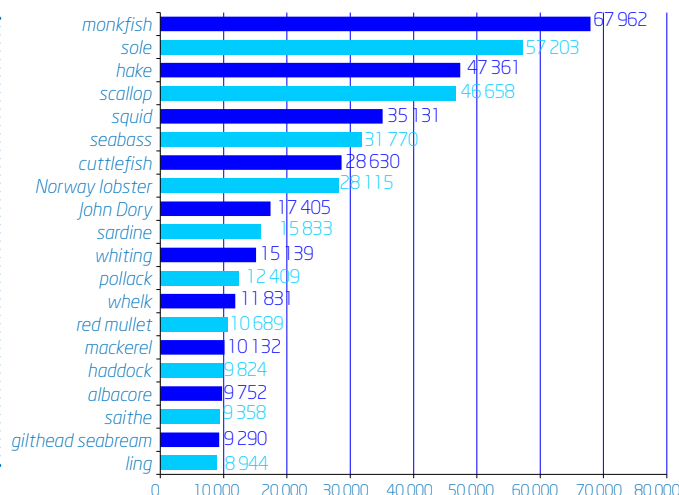
Sources: FranceAgriMer, Ifremer

Main species sold at auction by French vessels in 2018

Quantities sold (tons)

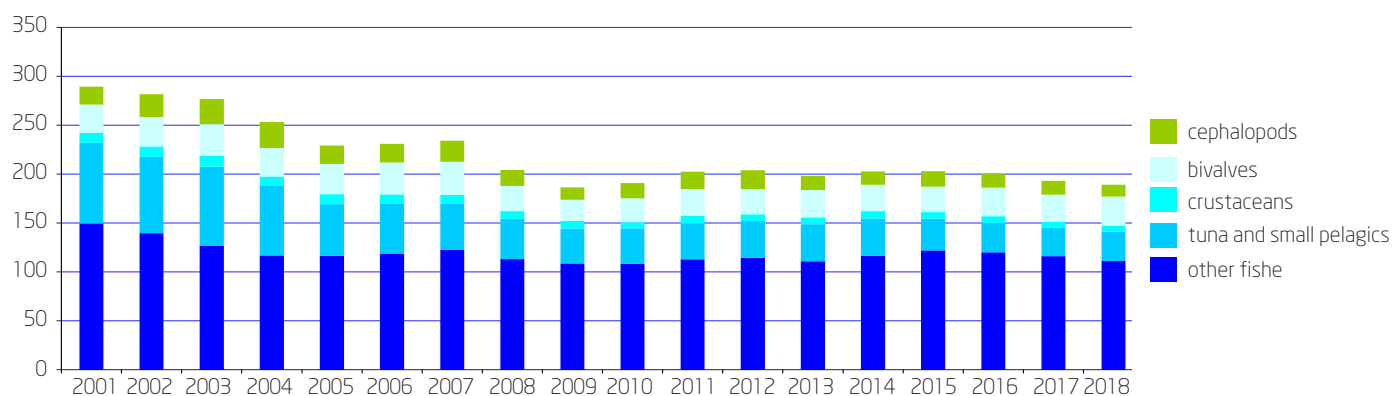


Value of sales (1 000 euros)



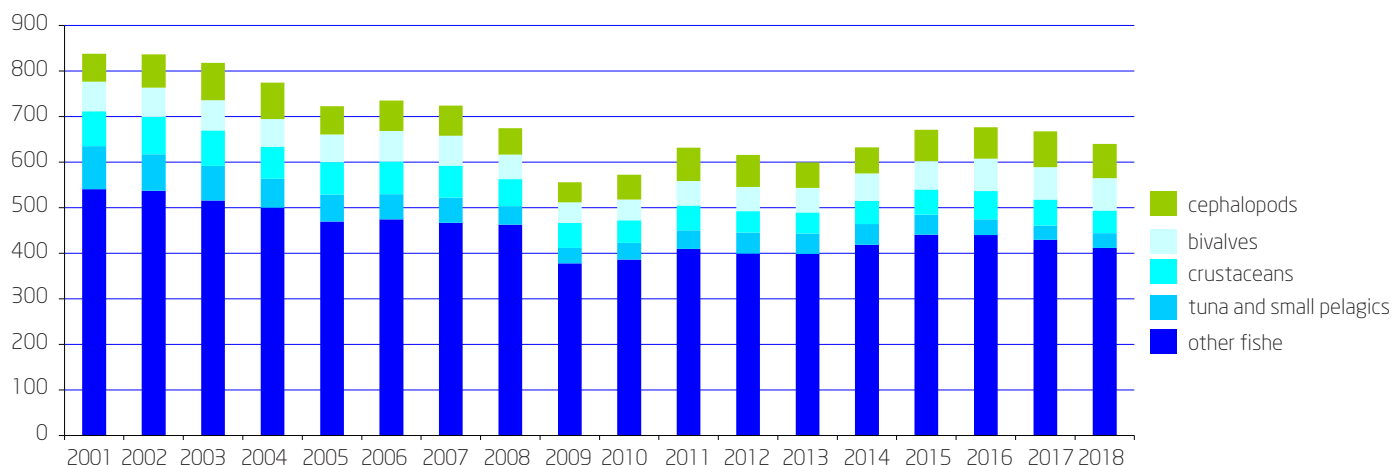
Changes in quantities sold by the French vessels by species group

(1 000 tons)



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

(million euros)

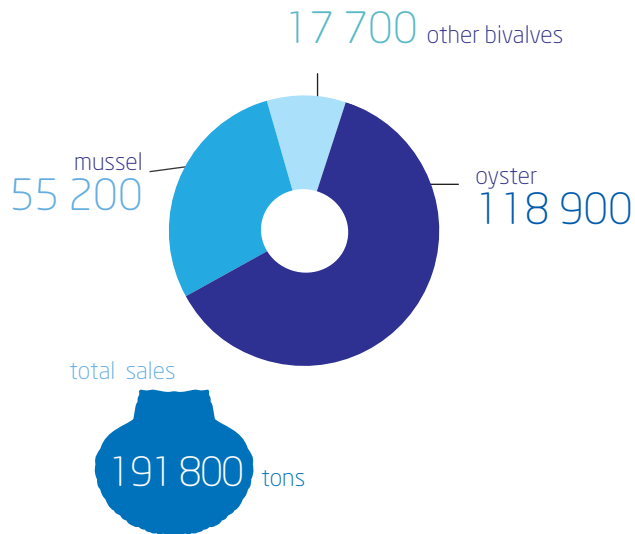


Source: VISIOMer/ FranceAgriMer

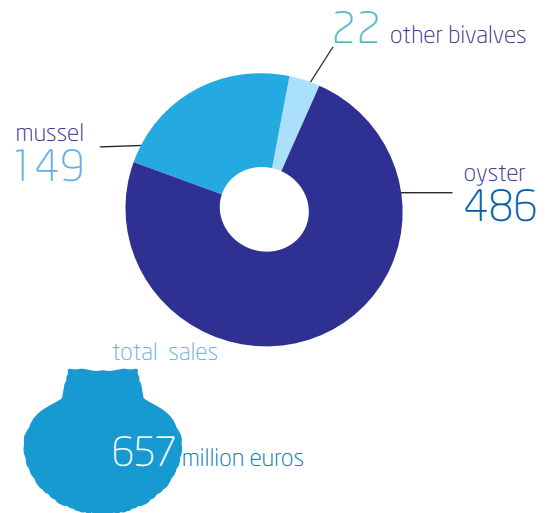
Sales of aquaculture products in metropolitan France

Shellfish farming 2016

Quantities sold for consumption (tons)⁽¹⁾

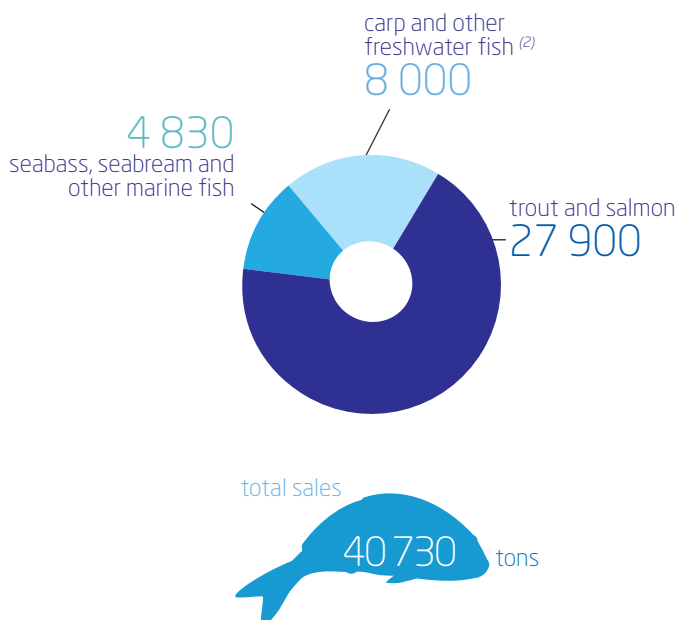


Value of sales (million euros)

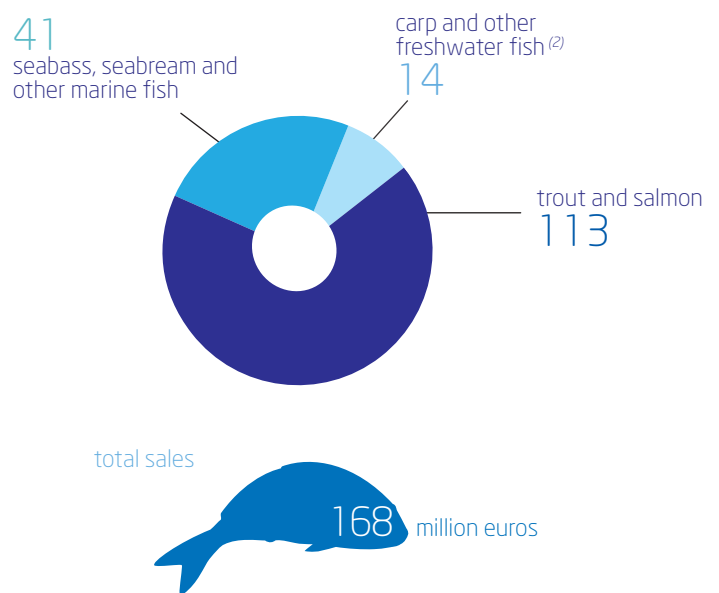


Fish farming 2016

Quantities sold (tons)⁽¹⁾



Value of sales (million euros)



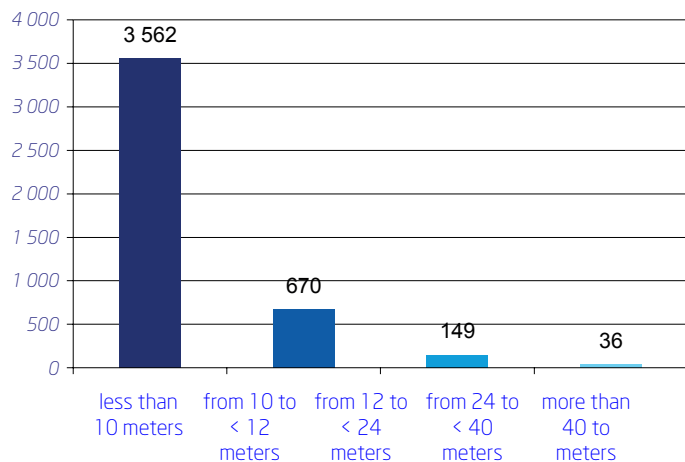
(1) equivalent live weight - (2) including farmed crustaceans

Source: Aquaculture survey 2016- LEMNA for DCF (EU) + DPMA data from 2015

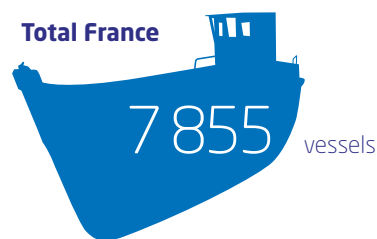
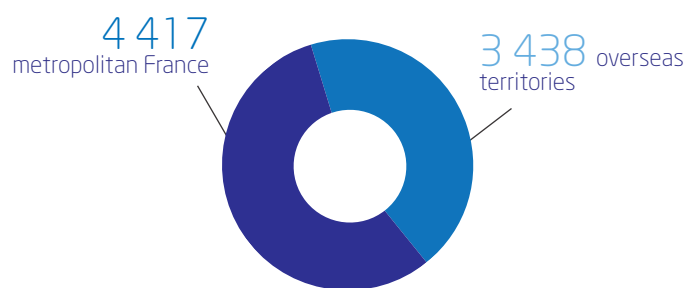
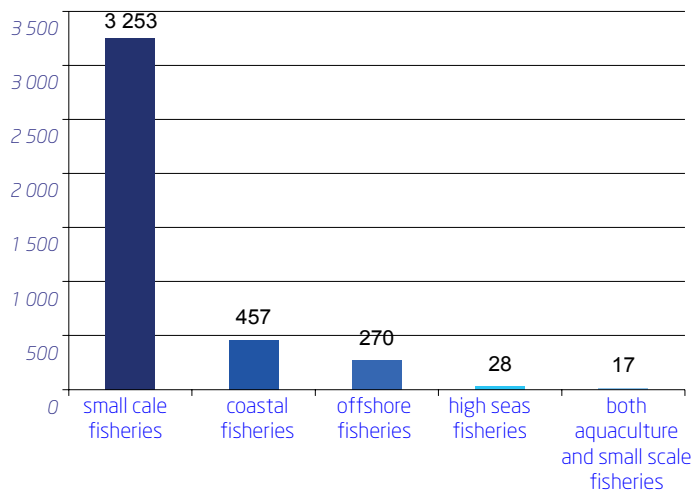
Production

Fishing fleet

Breakdown of total vessels by length in 2017 (metropolitan France)



Breakdown of total vessels by fishery category in 2014 (metropolitan France)⁽¹⁾

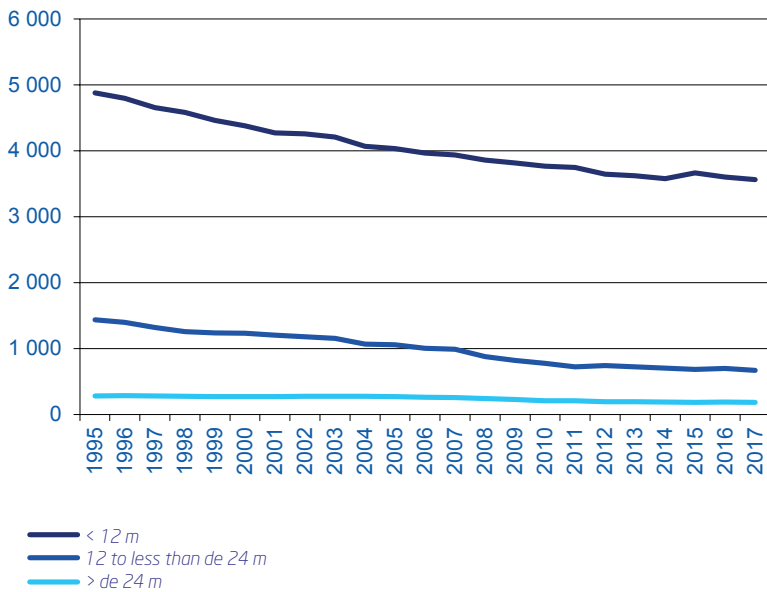


- Small scale fisheries** out of port for less than 24 hours
- Coastal fisheries** between 24 hours and 96 hours out of port
- Offshore fisheries** more than 96 hours out of port
- High seas fisheries** vessels over 1 000 GRT (gross register tonnage) or vessels over 150 GRT if out of port more than 20 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: IFREMER 2017 + study on overseas territories

Changes in the number of fishing vessels in metropolitan France



Source : IFREMER 2017

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

Aquaculture firms

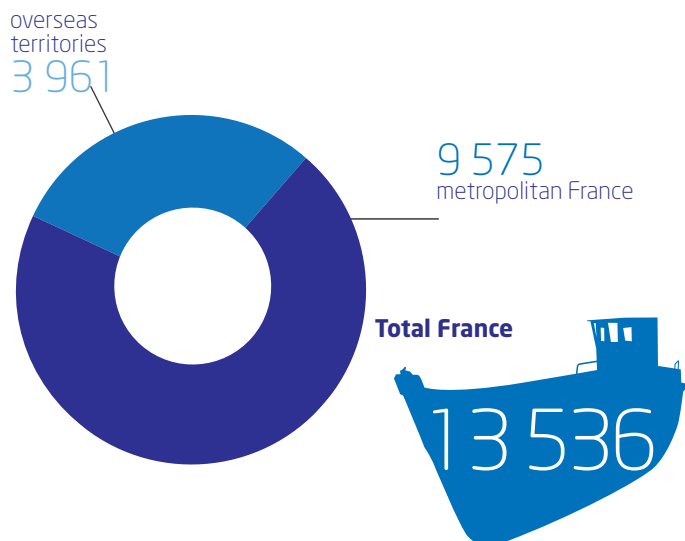
shellfish farming - including seaweed and shrimps	2 432
marine fish farming and sturgeon	35
continental salmonids farming	268

Source: aquaculture survey from 2016 - LEMNA for DCF (EU) + DPMA data from 2015

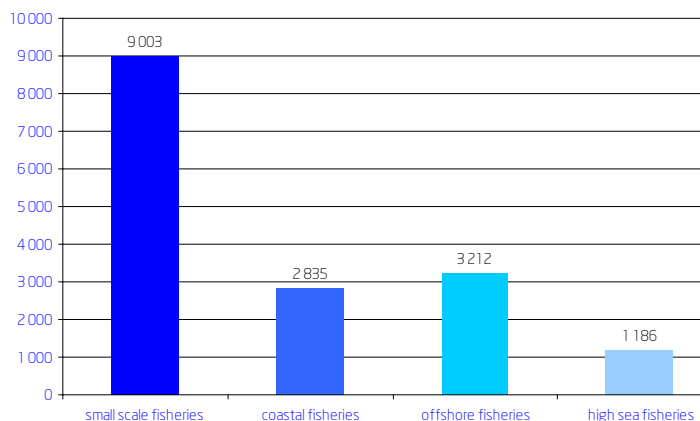
Production

Jobs

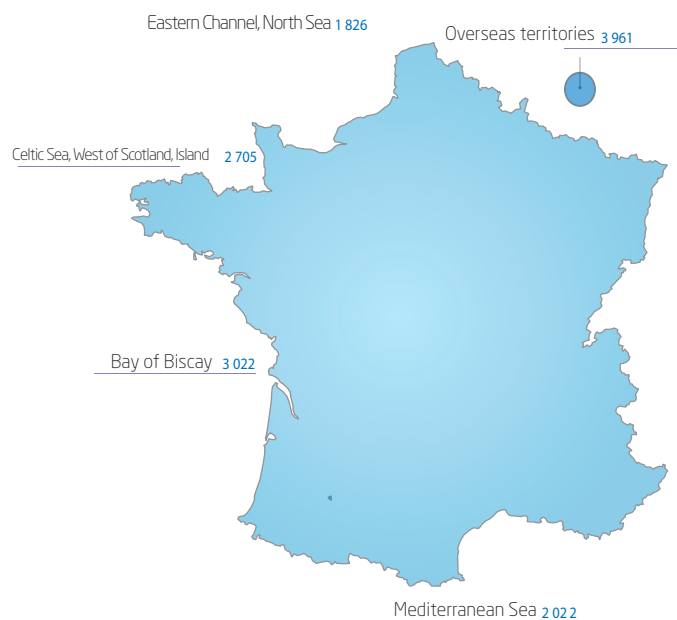
Number of seamen employed on board French fishing vessels in 2016 (seamen of all nationalities)



Total France



Regional sharing



Source: MAA/DAM/DPMA

Number of full time equivalent jobs in 2016 ⁽¹⁾

	jobs	FTEJ
shellfish farming	13 841	7 892
marine fish farming and sturgeon ⁽²⁾	521	468
continental salmonids farming	1 223	945

(1) including seasonal jobs - (2) Data from 2014

Source: DPMA - Data Collection Framework (DCF)

FIRMS

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





Firms /

Fishmonger firms

Fishmongers in 2016

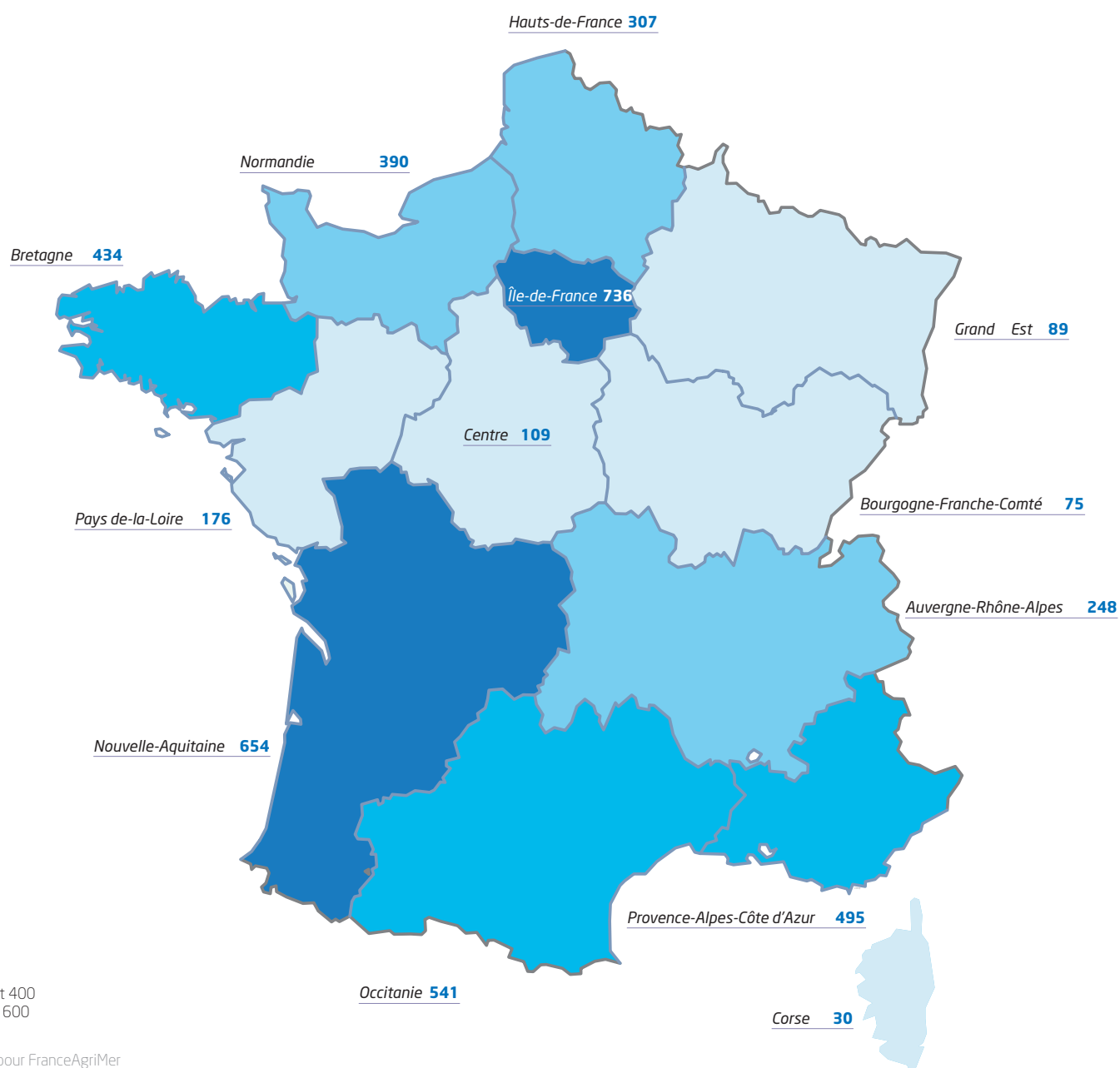
number of establishments



net sales



full time equivalent jobs



Source : Via.Aqua pour FranceAgriMer

Trading firms in 2016

number of firms



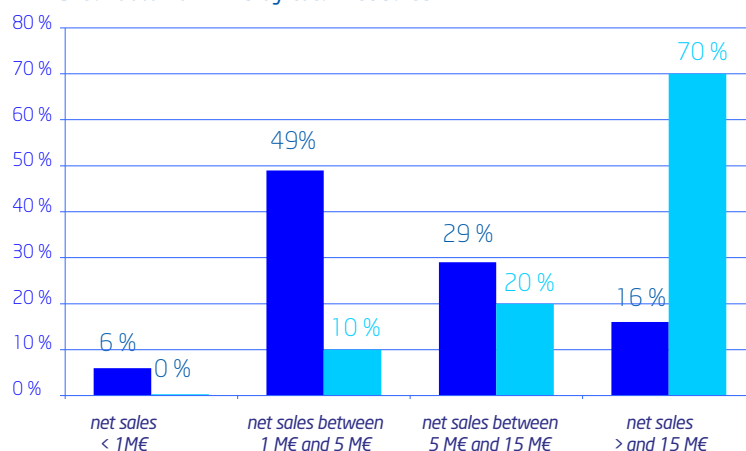
jobs ⁽¹⁾



net sales ⁽¹⁾

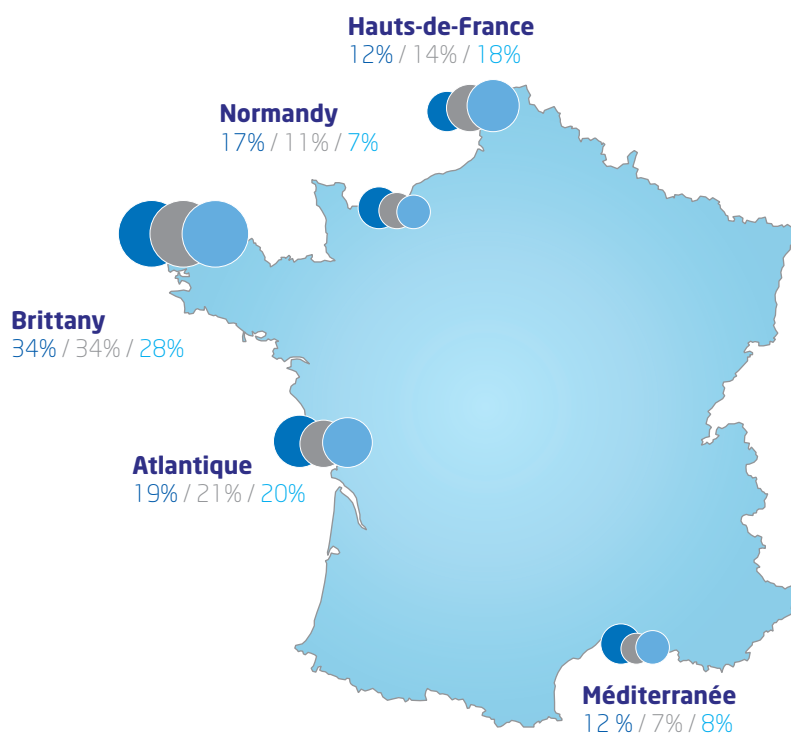


Breakdown of firms by total net sales



Breakdown of firms and total net sales by region

● % of total firms ● % of total net sales



Others regions
including overseas territories
6% / 13% / 20%

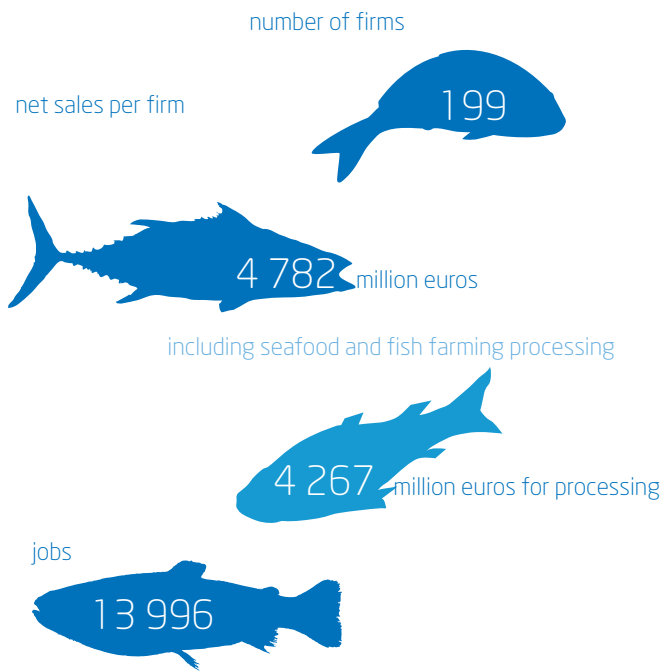


● % of total firms
● % jobs
● % of total net sales

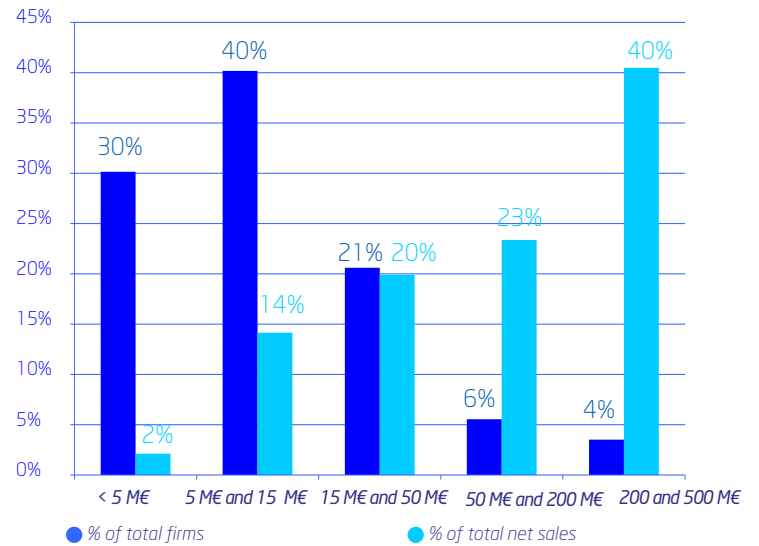
Source: FranceAgriMer

(1) data 2014 or 2015

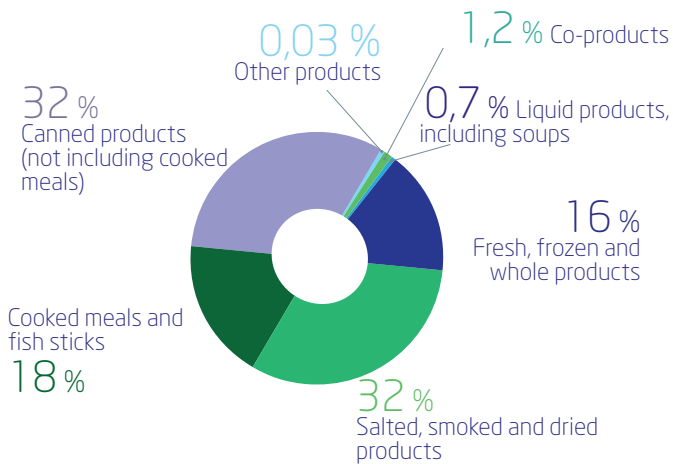
Processing main activity firms in 2017



Breakdown of firms by total net sales⁽³⁾

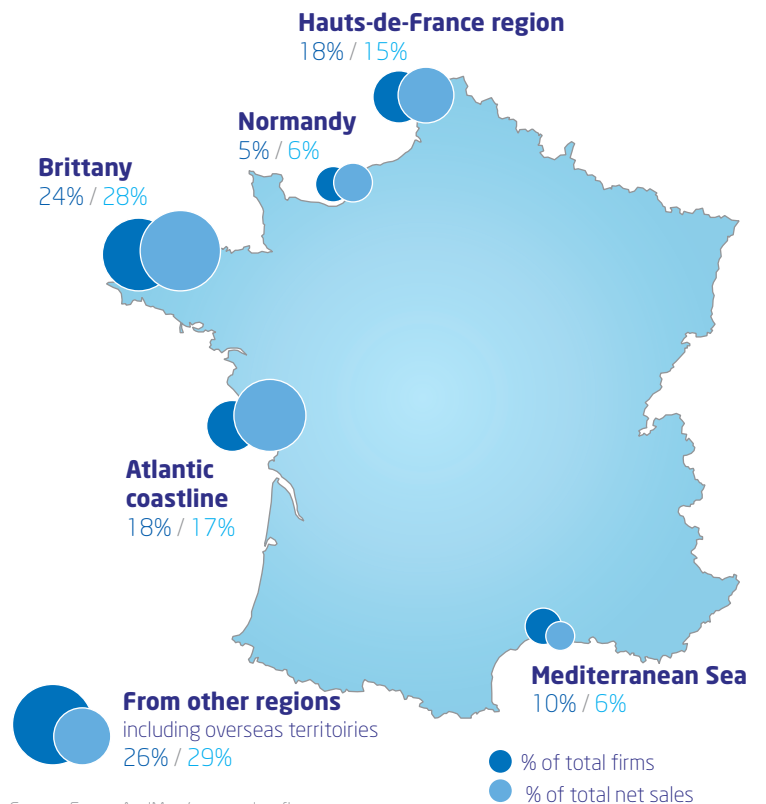


Seafood processing net sales⁽³⁾



(1) filleting, cutting, peeling, packaging, surgelation
 (2) seaweeds, in fish products, others
 (3) small sample estimation

Breakdown of processing firms and sales by region⁽³⁾



Source: FranceAgriMer / processing firms survey

TRADE

imports / exports

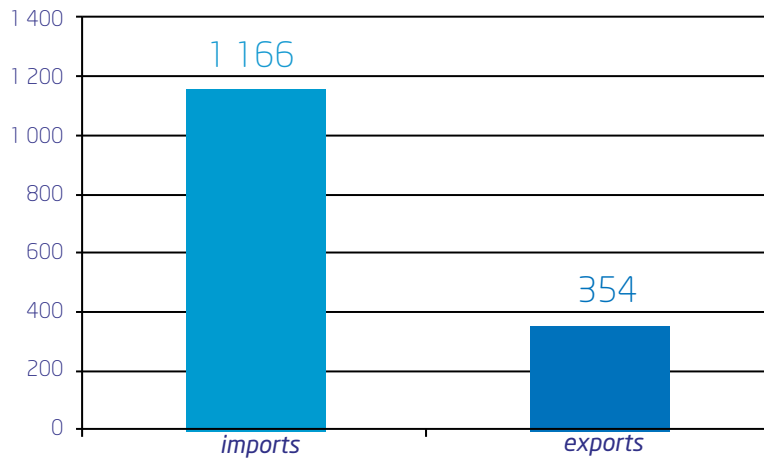
by presentation / by species / by geographical origine /
main species



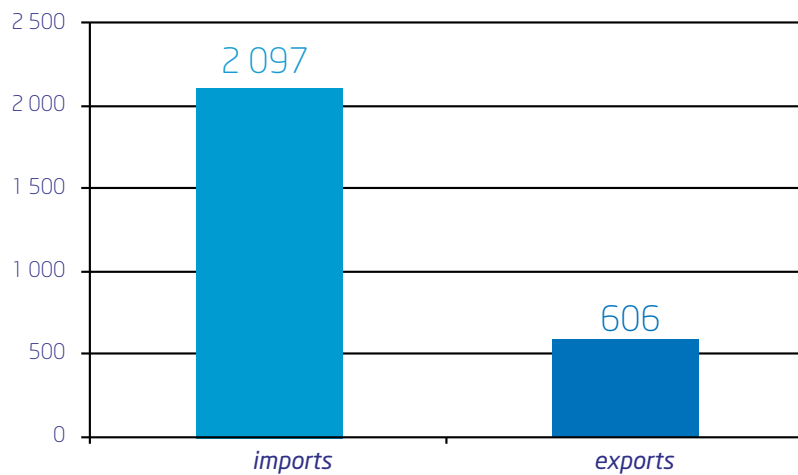


Supply balance in 2018

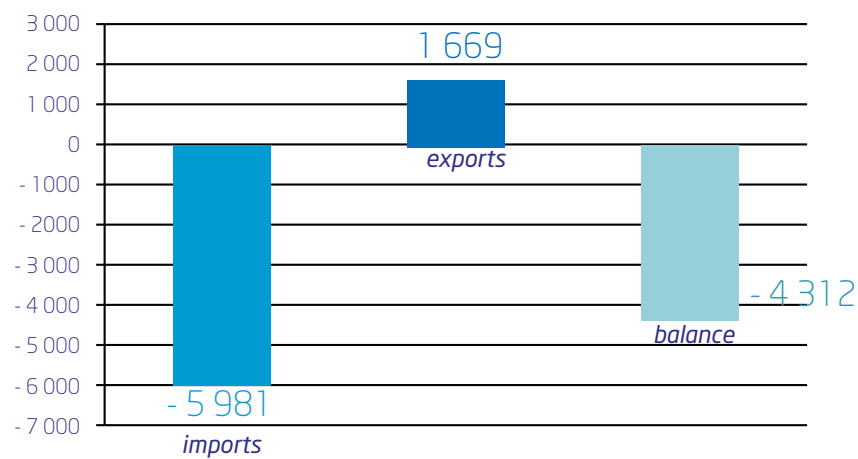
Net weight (1 000 tons)



Live weight (1 000 tons)



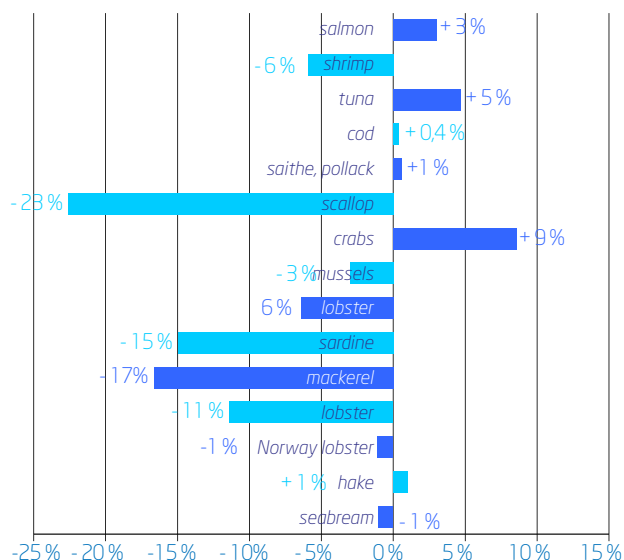
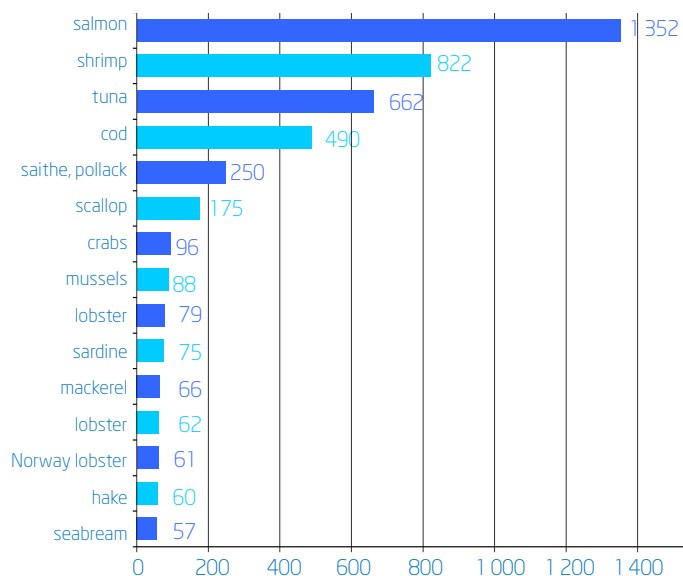
Value (million euros)



Source : French customs

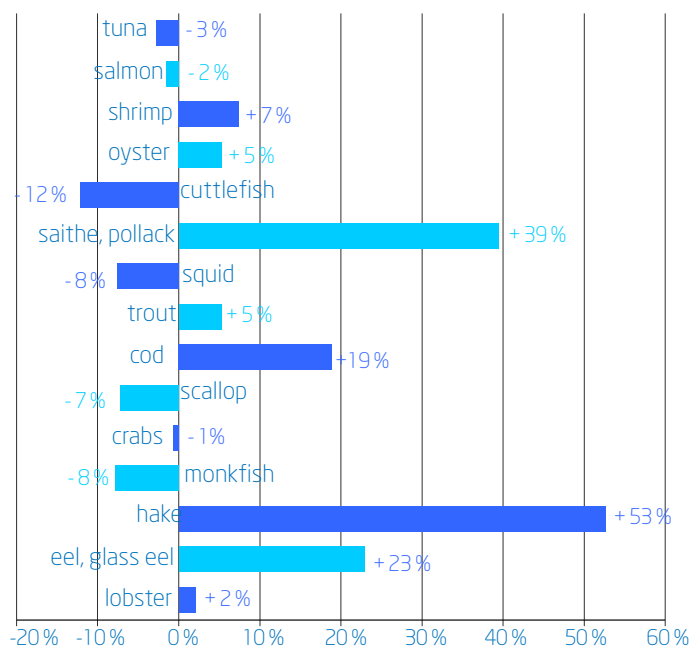
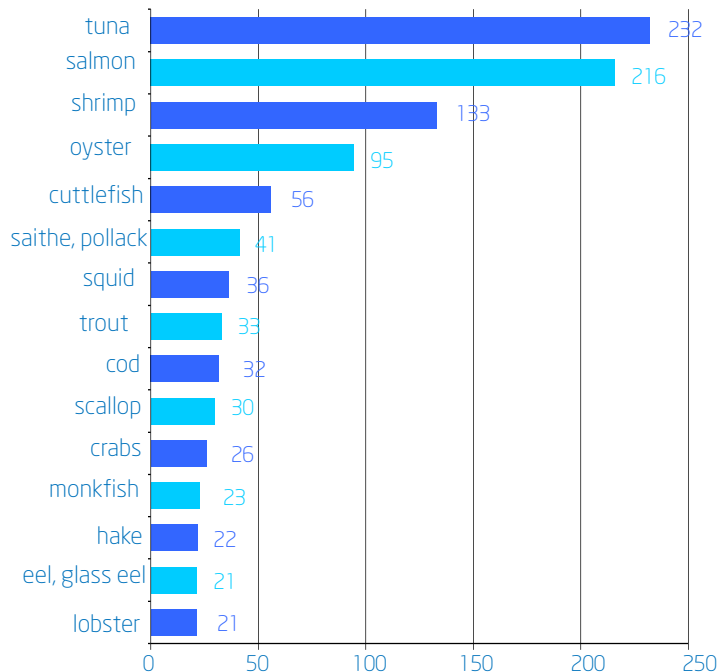
Imports - main species in 2018

Value (million euros)



Exports - main species in 2018

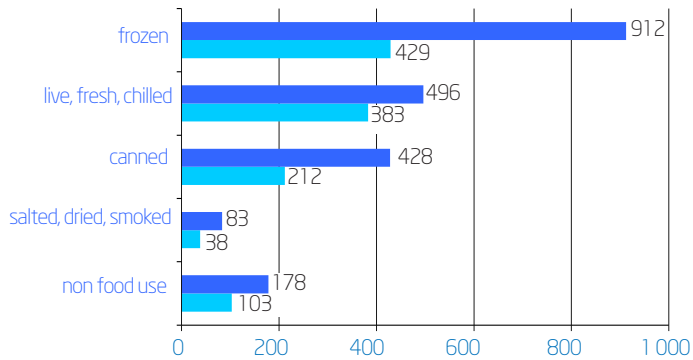
Value (million euros)



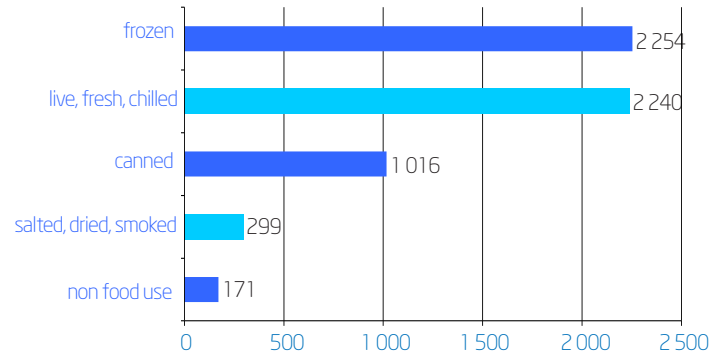
Source : French customs

Imports by presentation in 2018

Imports by volume (1 000 tons)



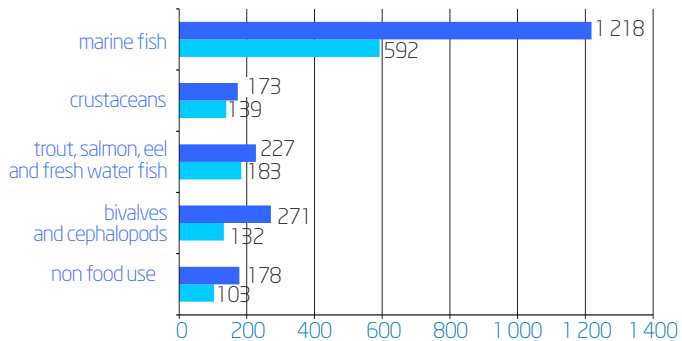
Imports by value (million euros)



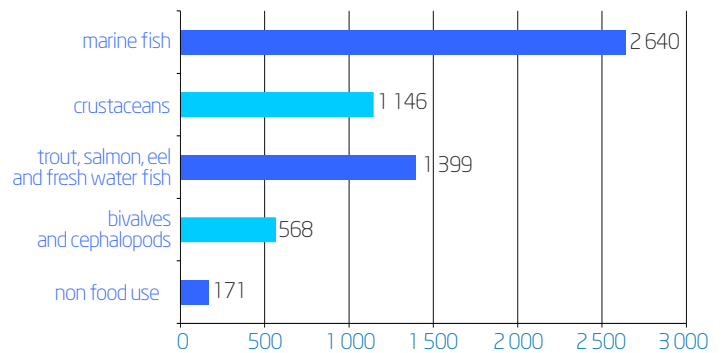
● live weight⁽¹⁾
● net weight

Imports by species group in 2018

Imports by volume (1 000 tons)



Imports by value (million euros)

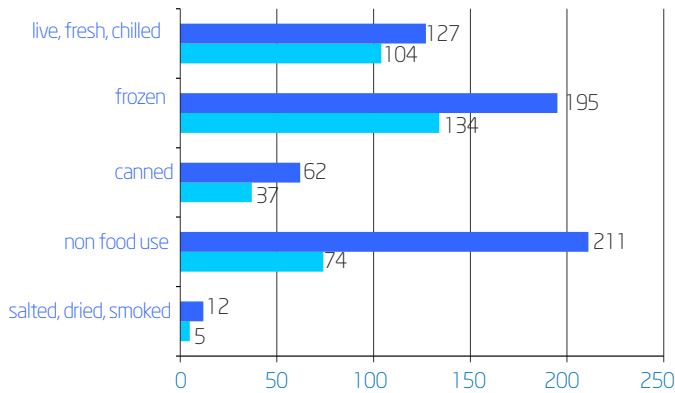


● live weight⁽¹⁾
● net weight

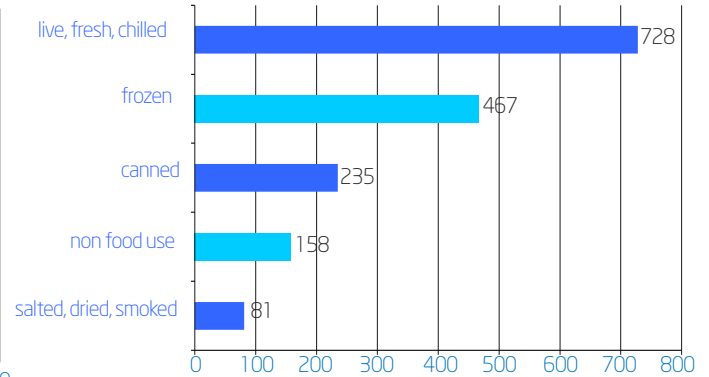
(1) data collection methodology is detailed on inside back cover -
Source: French customs

Exports by presentation in 2018

Exports by volume (1 000 tons)



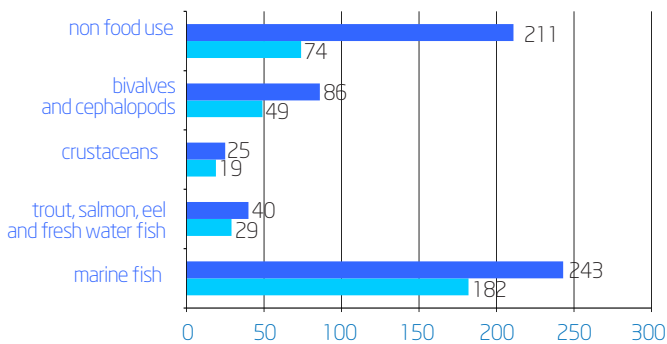
Exports by value (million euros)



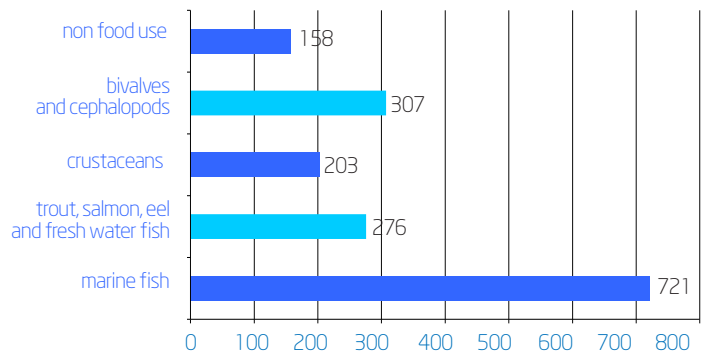
● live weight (1)
● net weight

Exports by species group in 2018

Exports by volume (1 000 tons)



Exports by value (million euros)

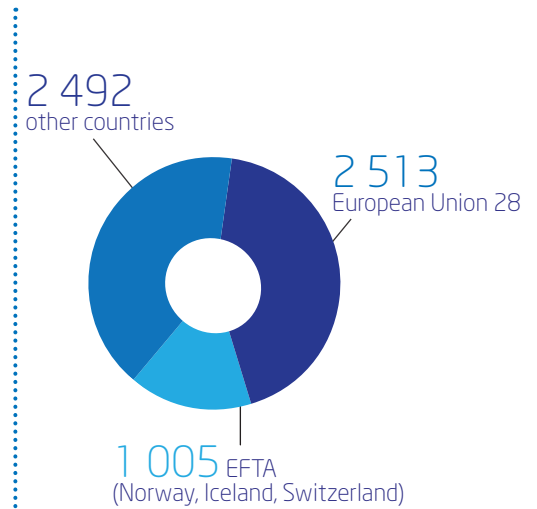
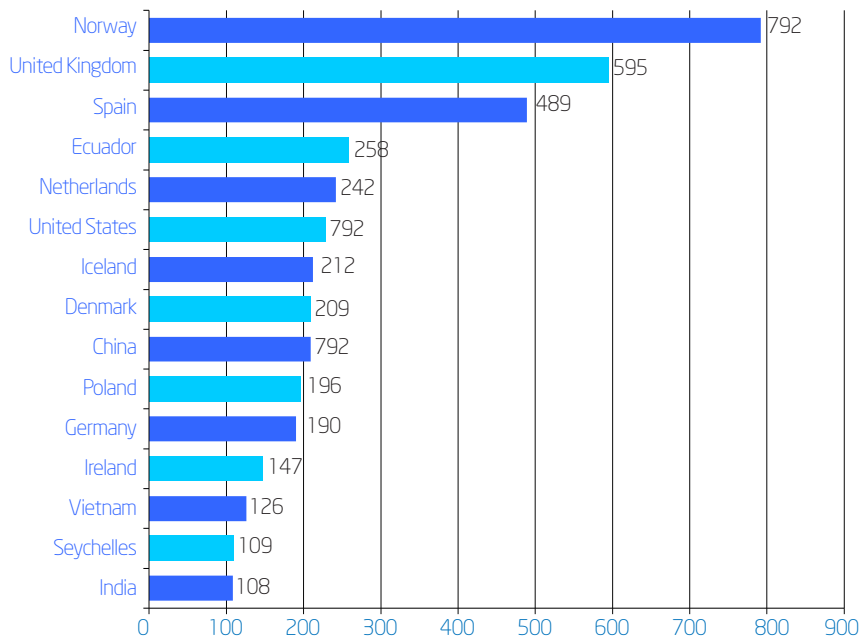


● live weight (1)
● net weight

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

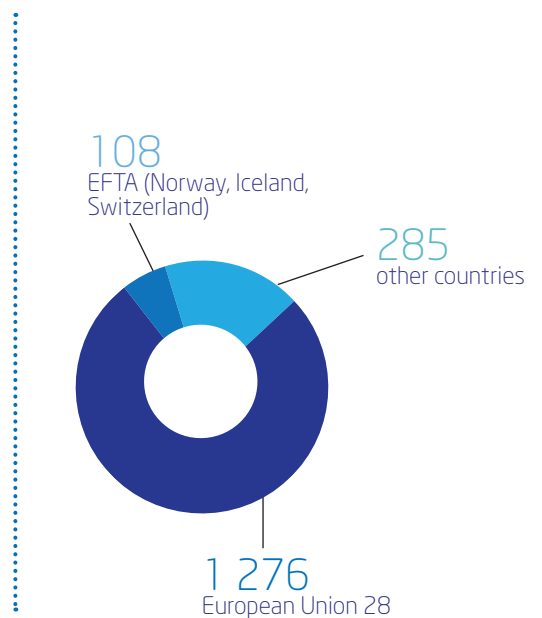
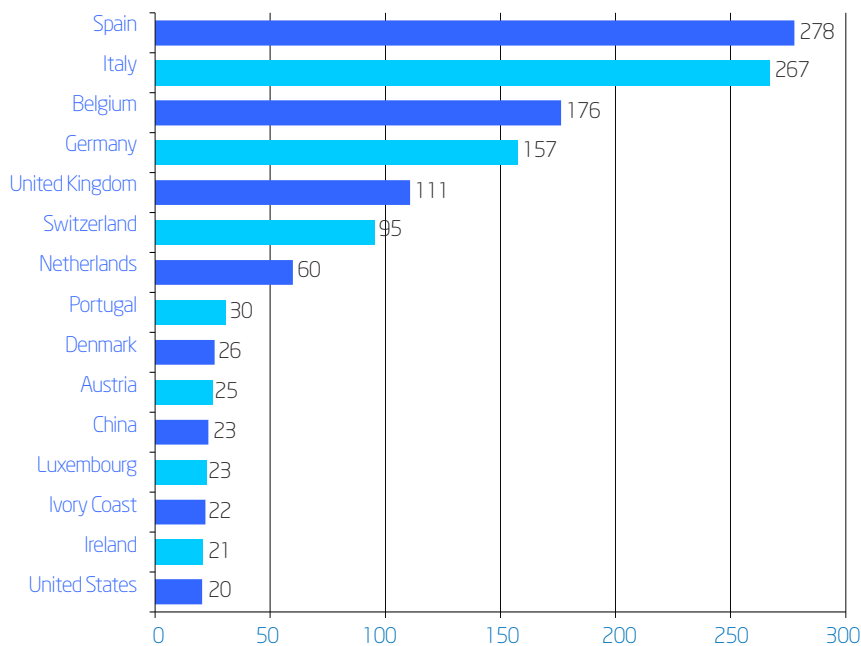
Imports of aquatic products by geographical origin in 2018

Value (million euros)



Exports of aquatic products by destination in 2018

Value (million euros)



Source : French Customs

CONSUMPTION

supply balance / purchases

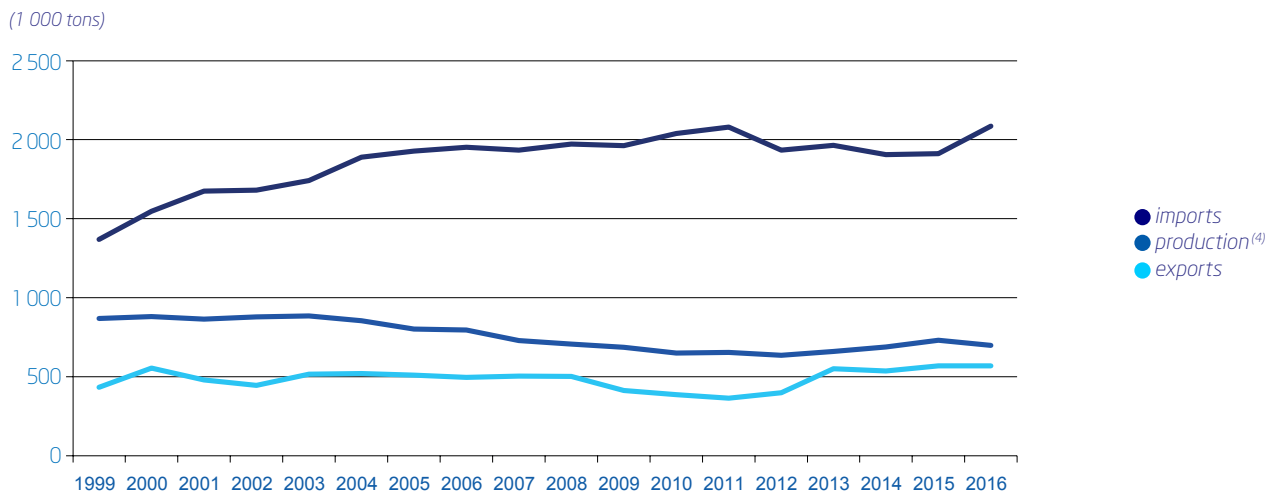
households / catering / breakdown of purchases by distribution channel





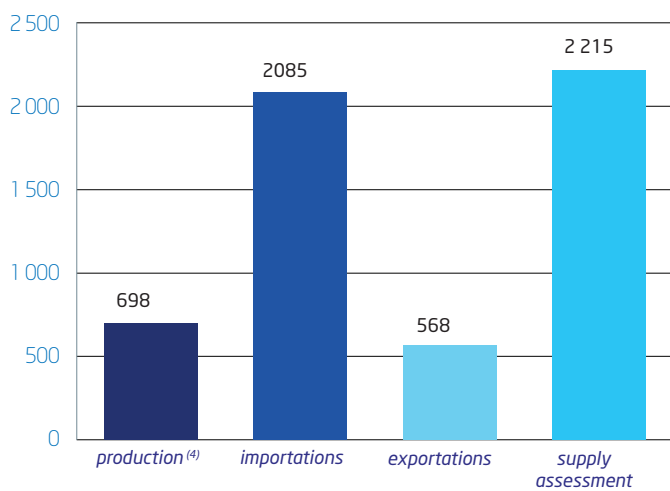
Consumption / supply balance

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

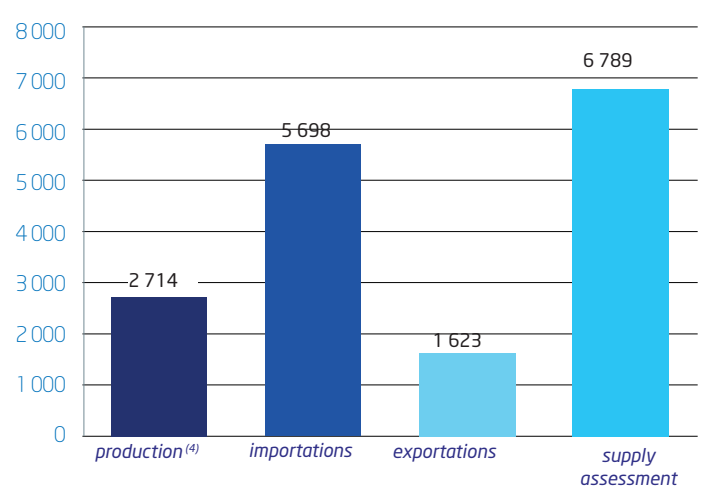


Supply balance in 2016 ⁽¹⁾⁽²⁾⁽³⁾

in volume (1 000 tons)

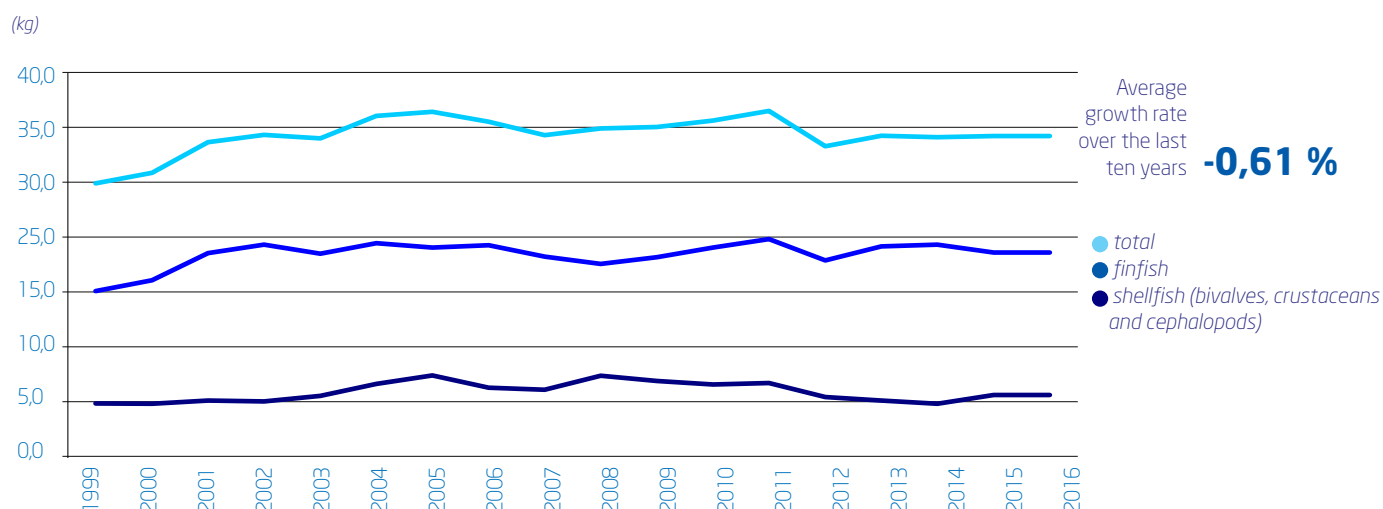


in value (million euros)

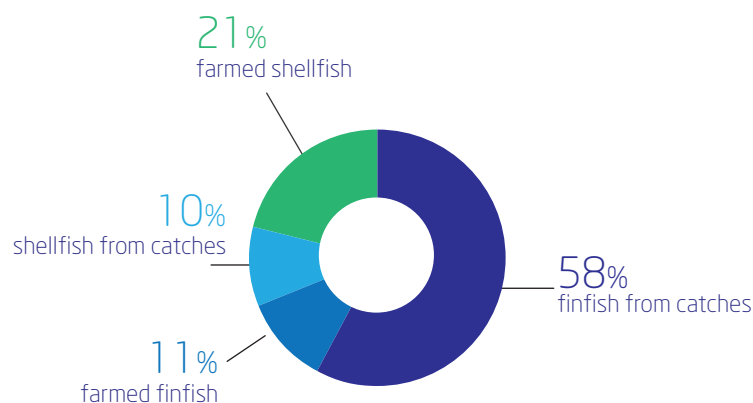


(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) excluding non food use - (4) estimates for 2014 and 2015
Source: FranceAgriMer

Changes in supply balance ⁽¹⁾⁽²⁾



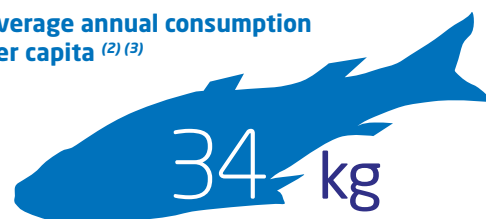
Breakdown by products in 2015 ⁽¹⁾⁽²⁾



(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) average 2013-2015
Source : FranceAgriMer

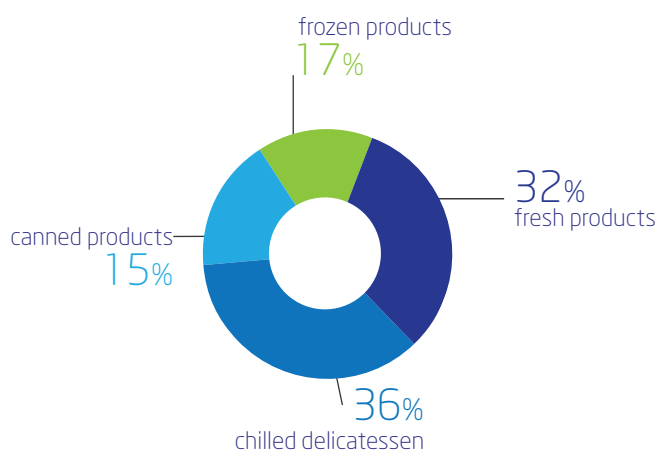
Average annual consumption per capita ^{(2) (3)} (kg)	
Fish farming	4
Salmon	3
Others/farming	7
Mussel	3
Oyster	1
Scallop	1
Shrimp	1
Fish from catches	20
Tuna	4
Cod	2,70
Alaska pollock	2,20
Scallop	1,29
Sardine	1
Hake	1
Herring	0,75
Mackerel	0,74
Saithe	0,67
Monkfish	0,40

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

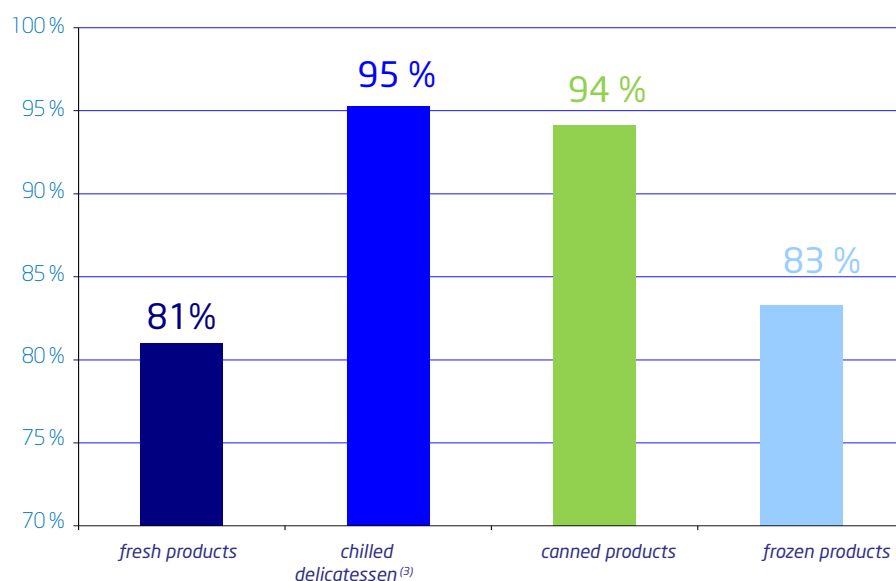


(1) voir note méthodologique en troisième de couverture - (2) équivalent poids vif - (3) moyenne 2013-2015
Source : FranceAgriMer

Households spending in 2018 ⁽¹⁾



Percentage of purchasing households in 2018 ⁽²⁾



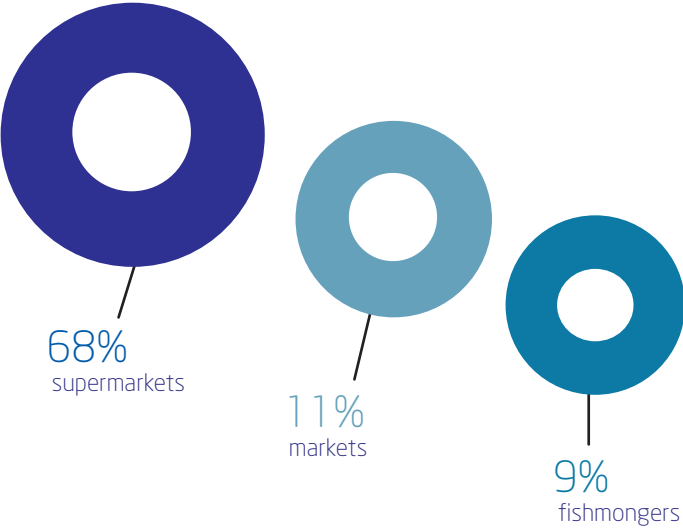
Consommation des ménages sur 10 ans

	2009		2018		Evolution	
	Total quantities (1 000 tons)	Spending (1 000 €)	Total quantities (1 000 tons)	Spending (1 000 €)	Volumes	Values
Fresh products	259 158	2 339 637	239 908	2 766 399	-7%	18%
Frozen products	149 560	1 369 744	118 406	1 269 548	-21%	-7%
Canned products	109 816	915 354	124 912	1 136 821	14%	24%
Chilled delicatessen	162 066	1 878 324	186 970	2 675 224	15%	42%

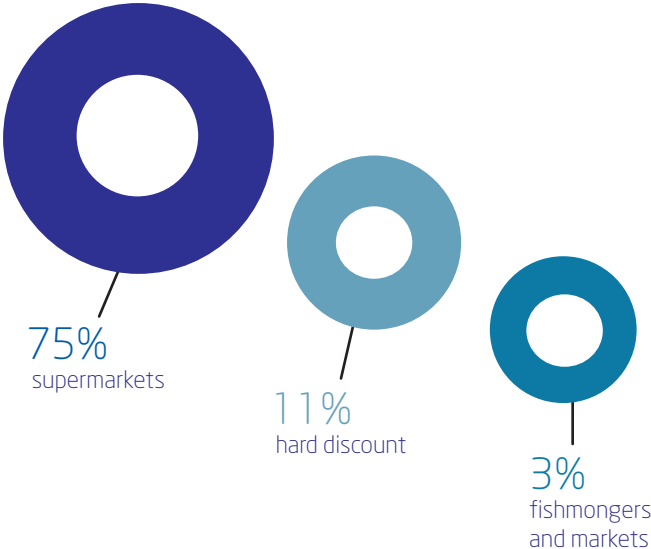
(1) data collection methodology is detailed on inside back cover - (2) a purchasing households buys the product at least once a year - (3) with bar code
Source: FranceAgriMer from Kantar Worldpanel

Consumption of aquatic products by presentation for home consumption in 2018⁽¹⁾

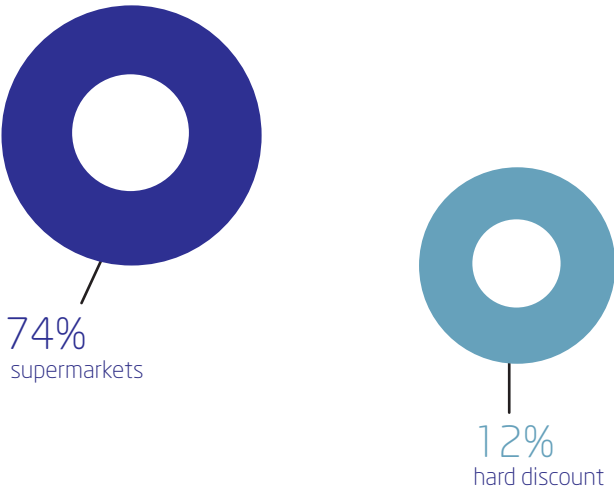
Fresh products



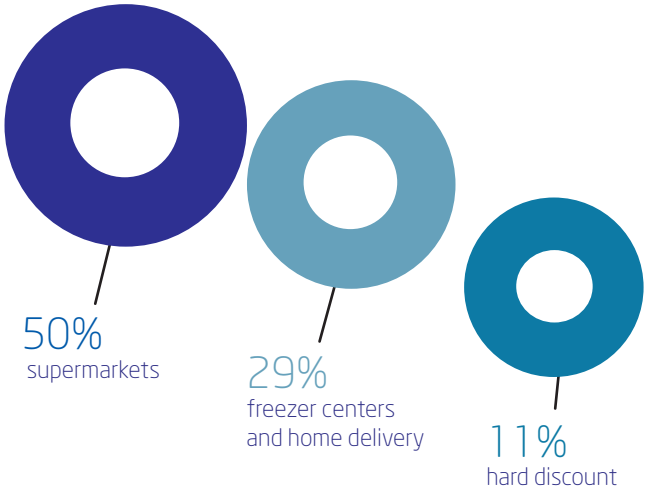
Chilled delicatessen



Canned products



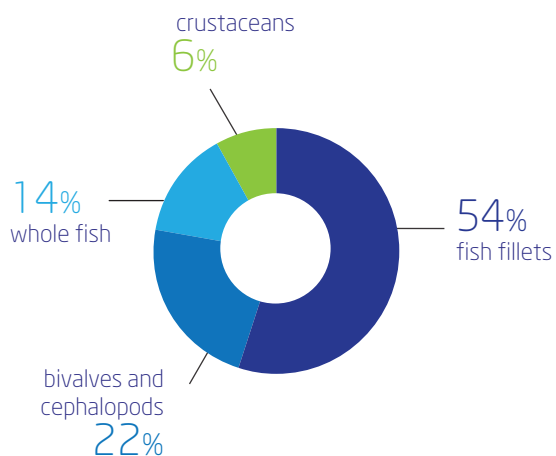
Frozen products



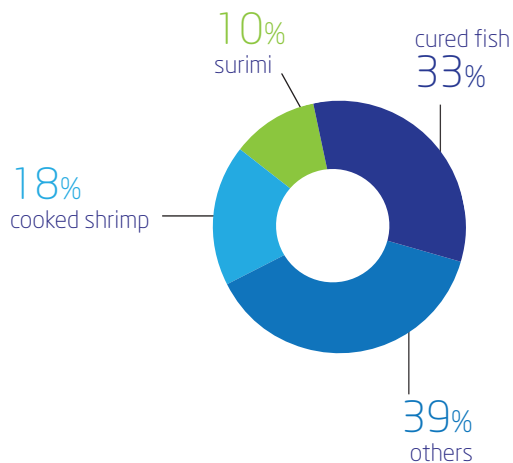
(1) data collection methodology is detailed on inside back cover
Source: FranceAgriMer from Kantar Worldpanel

Breakdown of expenditures by presentation and species groups in 2018 ⁽¹⁾

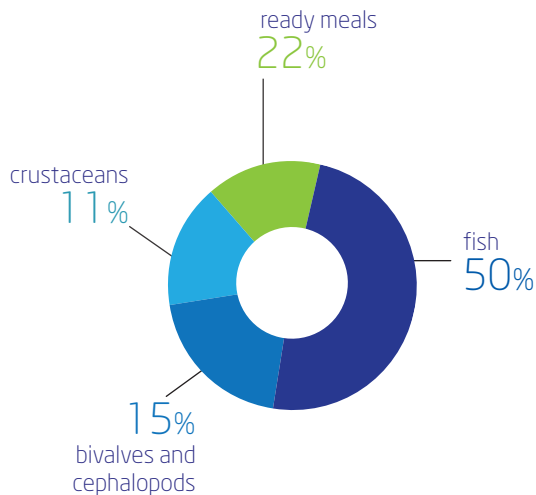
Fresh products



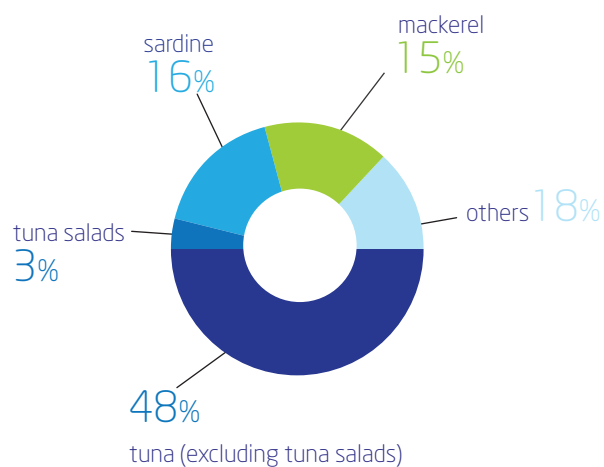
Chilled delicatessen



Frozen products



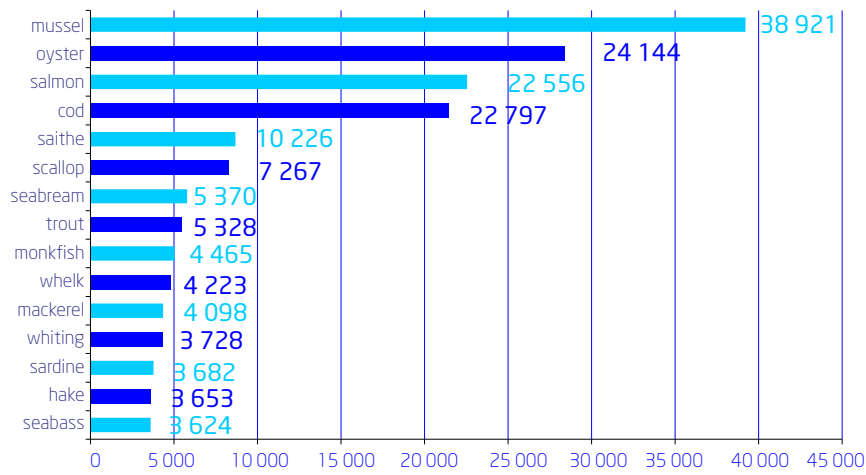
Canned products



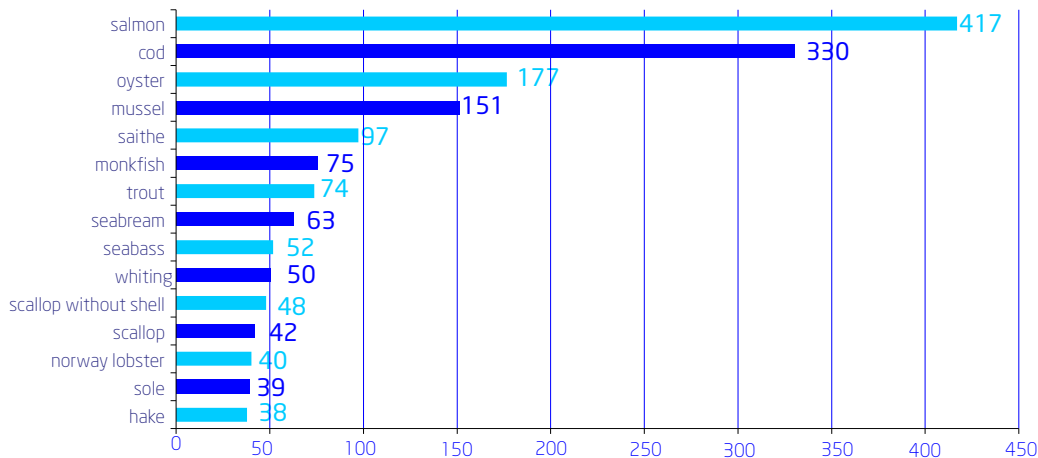
(1) data collection methodology is detailed on inside back cover
Source: FranceAgriMer from Kantar Worldpanel

Main species purchased fresh in 2018 ⁽¹⁾

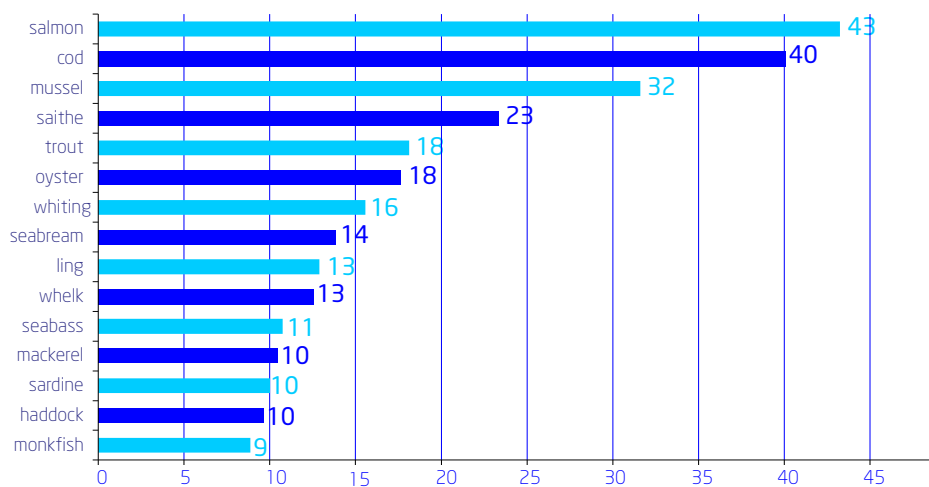
tons ⁽²⁾



million euros



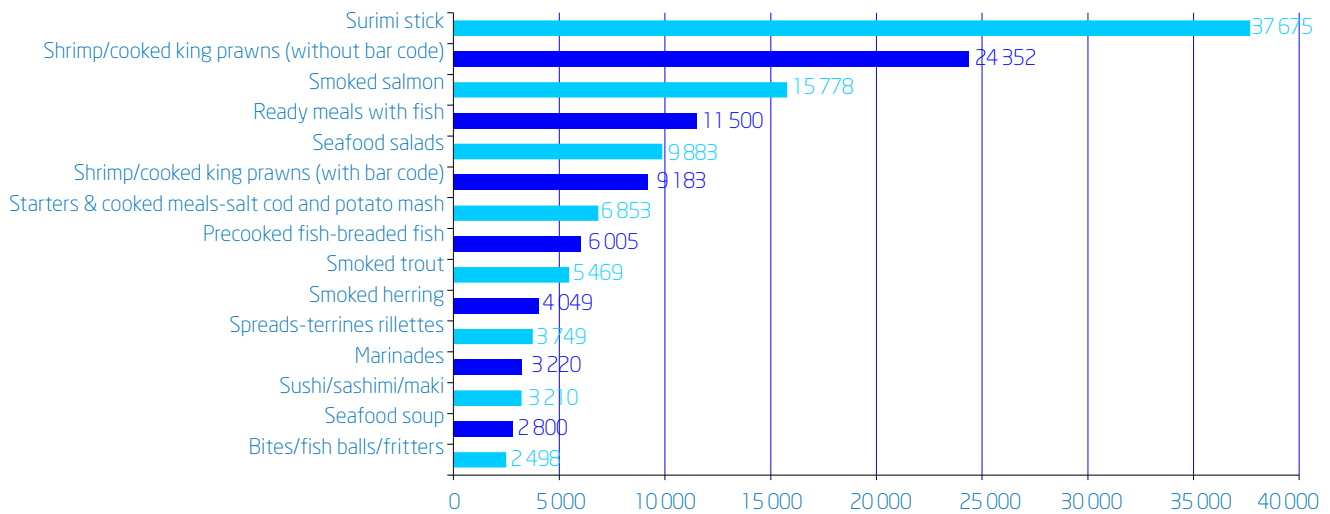
percentage of purchasing households (%)



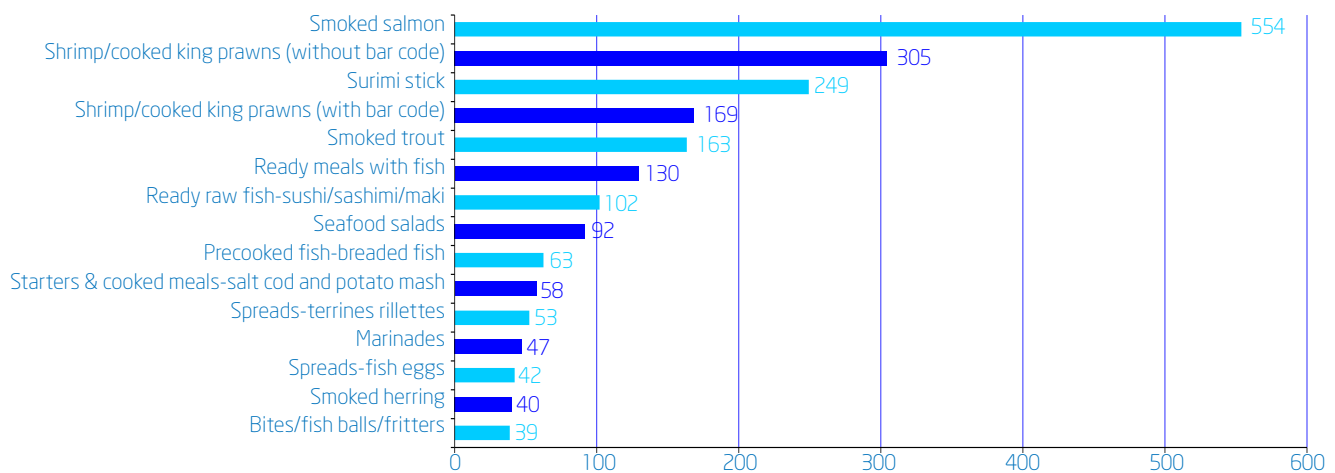
(1) data collection methodology is detailed on inside back cover - (2) net weight
Source: FranceAgriMer from Kantar Worldpanel

Mains species purchased in chilled delicatessen in 2018 ⁽¹⁾

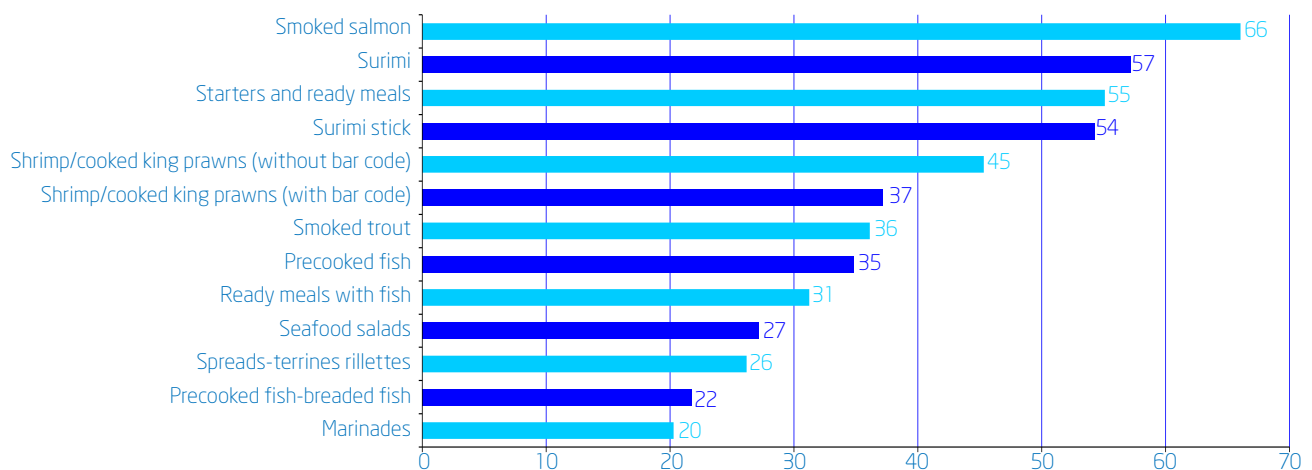
tons ⁽²⁾



million euros



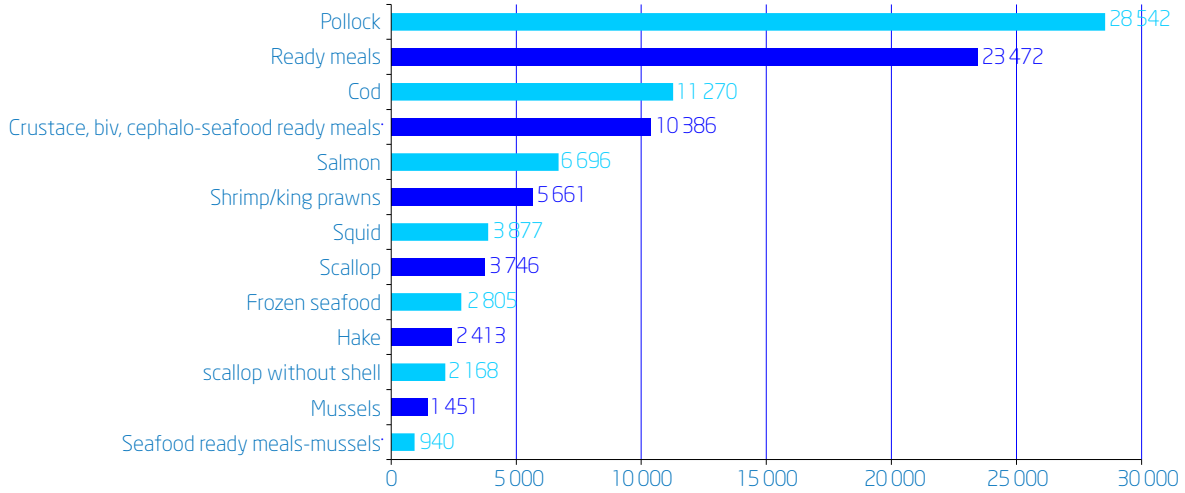
percentage of purchasing households (in %)



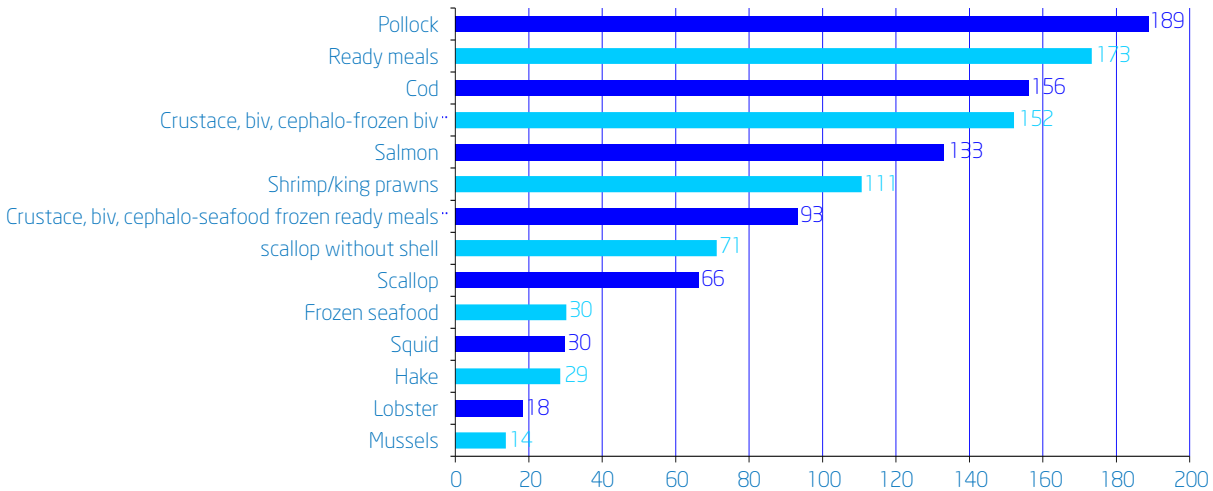
Source: FranceAgriMer from Kantar Worldpanel

Main species purchased frozen in 2018 ⁽¹⁾

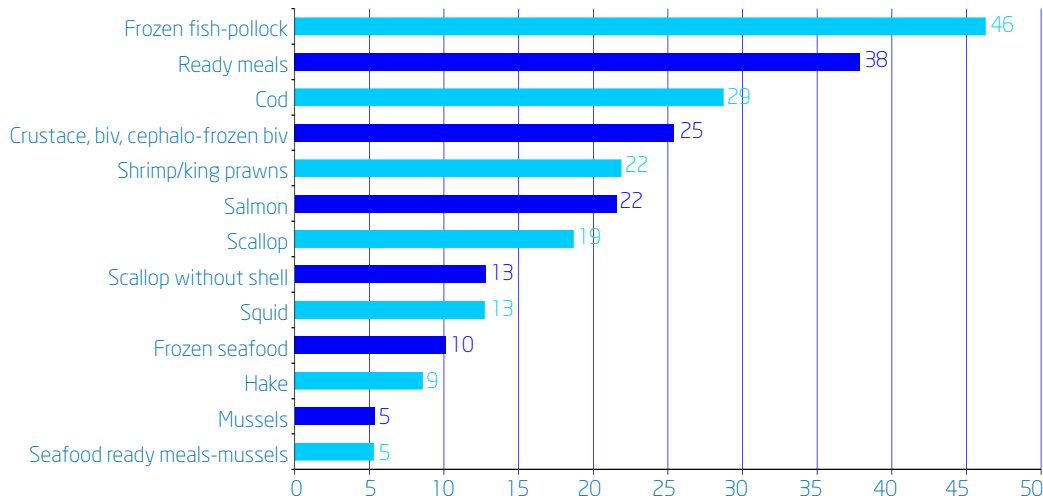
tons ⁽²⁾



million euros



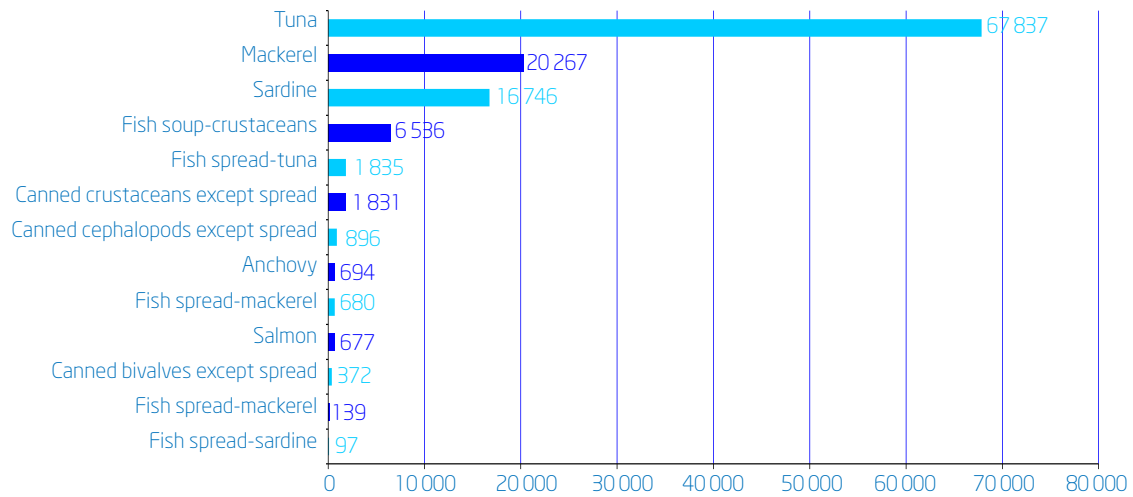
percentage of purchasing households (in %)



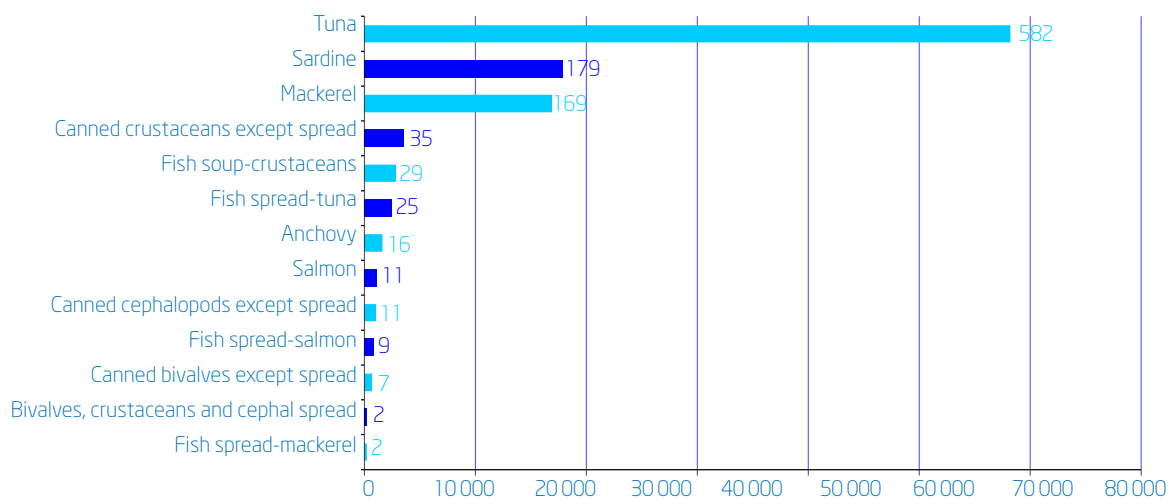
Source: FranceAgriMer from Kantar Worldpanel

Main species purchased frozen in 2018 ⁽¹⁾

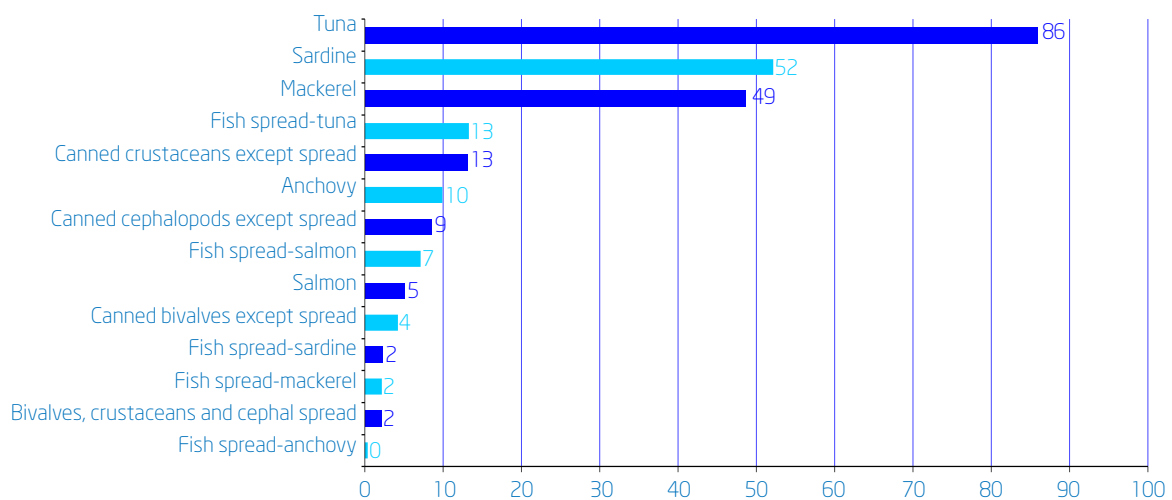
tons ⁽²⁾



million euros



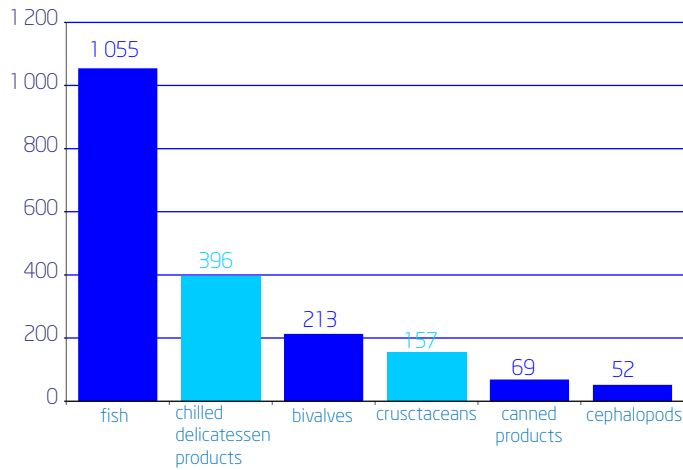
percentage of purchasing households (in %)



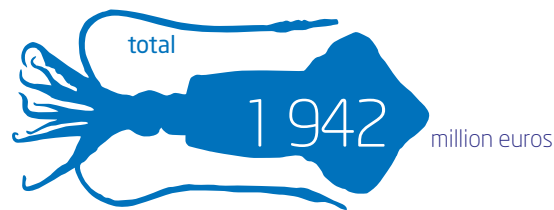
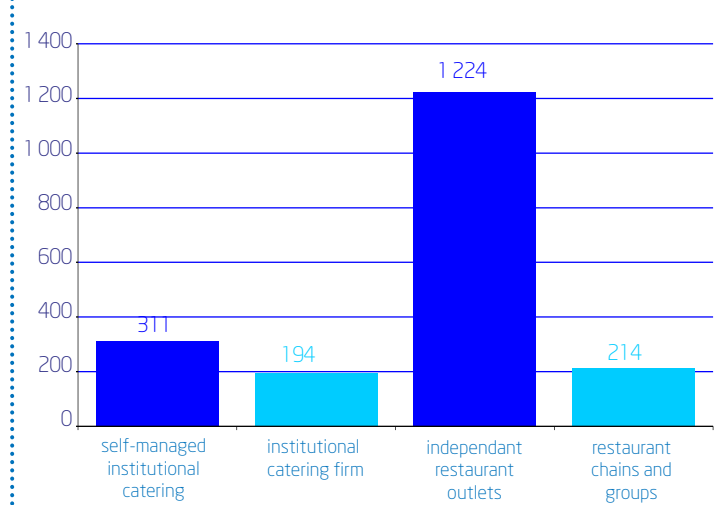
Source: FranceAgriMer from Kantar Worldpanel

Spending in 2017

by presentation (million euros)



by catering outlet type (million euros)

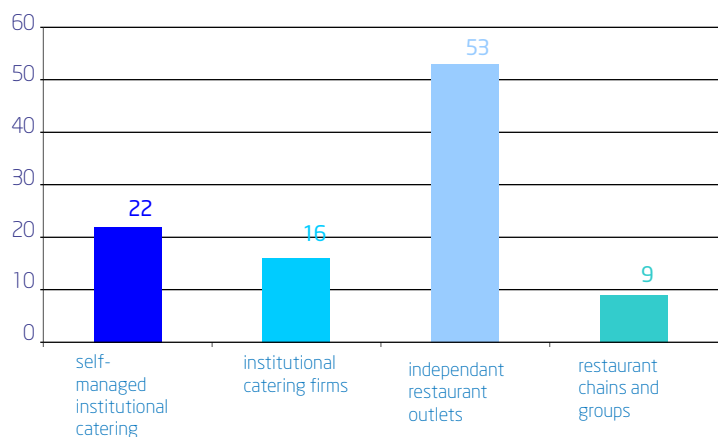


Source: FranceAgriMer from GiraFoodService

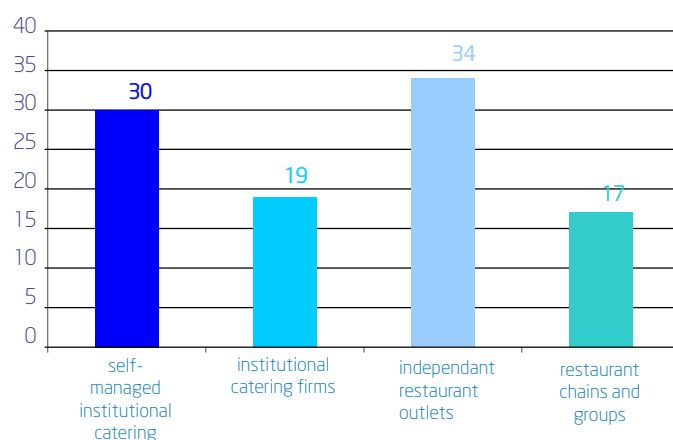
Purchases of aquatic products by the catering sector

Spending by catering outlet and by presentation in 2017

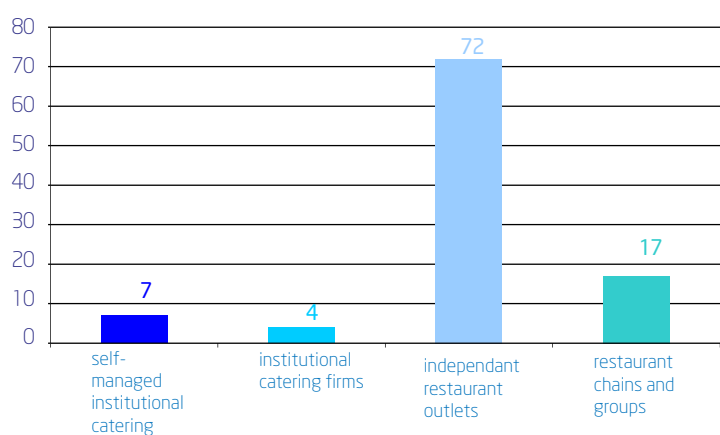
Fish products



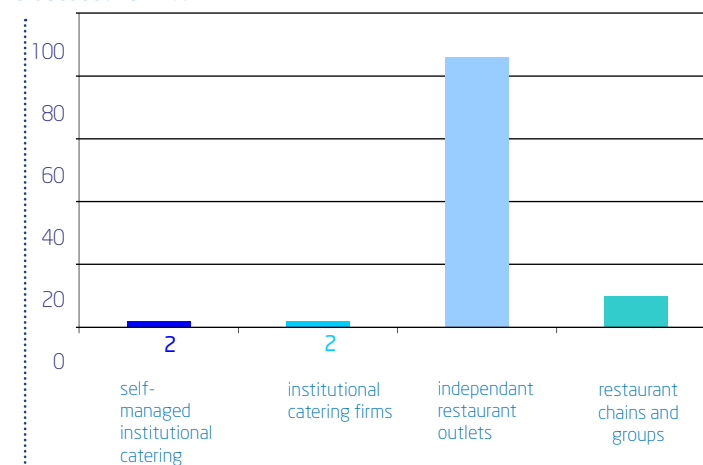
Chilled delicatessen products



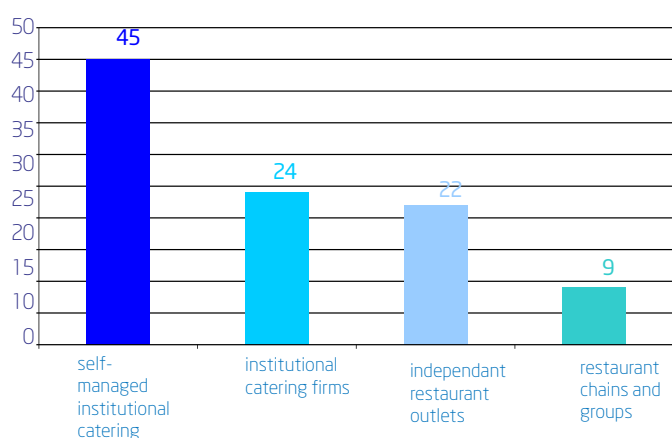
Shellfish products %



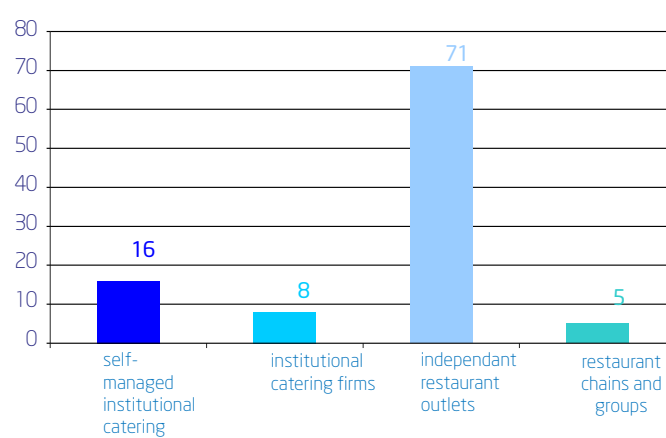
crustaceans in %"



Canned products en %

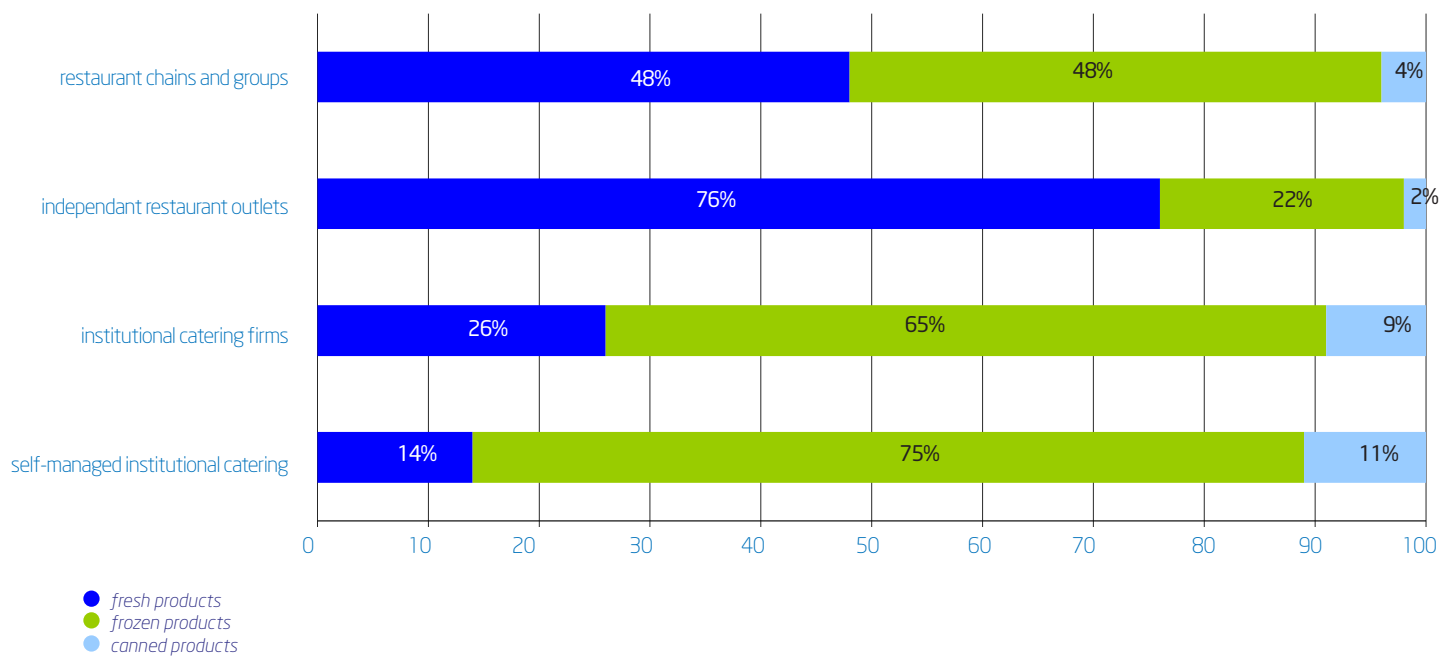


Céphalopodes en %

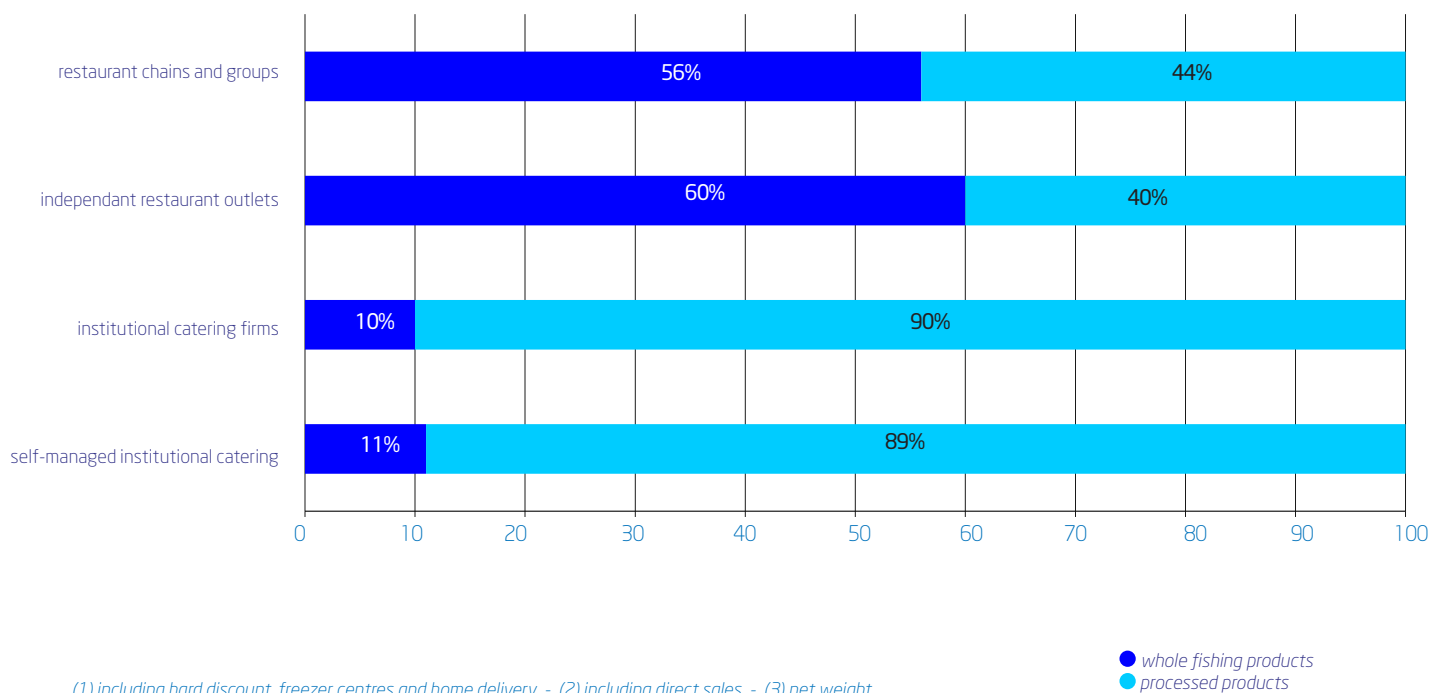


Source: FranceAgriMer from GiraFoodService

Breakdown of purchases by king of conservation for different outlets (quantities)



Breakdown of purchases by outlet for different presentations (quantities)



(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

