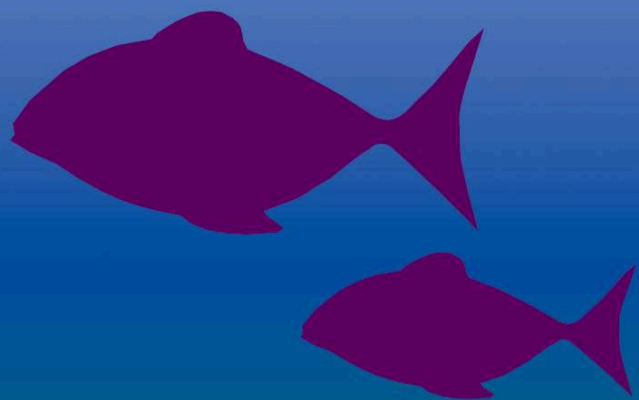


FranceAgriMer



Key figures for the fisheries and aquaculture sector in France 2009 Edition



Sources :

FranceAgriMer : Etablissement national des produits de l'agriculture et de la mer

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

- 1** Total sales of fisheries and aquaculture products
- 4** Sales of fisheries products at auction
- 9** Sales of aquaculture products
- 10** Fishing fleet
- 11** Aquaculture firms
- 12** Jobs

Fish trading and processing

- 13** Economic data
- 14** Regional distribution of firms
- 15** Breakdown of firms by total net sales

Trade

- 16** Imports and exports by presentation
- 18** Imports and exports by species group
- 20** Imports and exports by geographic area
- 22** Imports and exports by principal species

Consumption

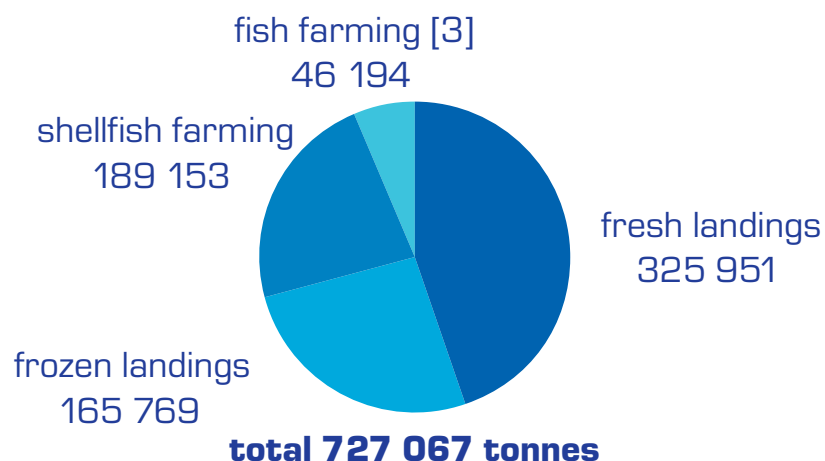
- 23** Supply balance
- 25** Household purchases
- 29** Catering purchases
- 30** Breakdown of purchases by distribution channel

Total sales of fishery and aquaculture products

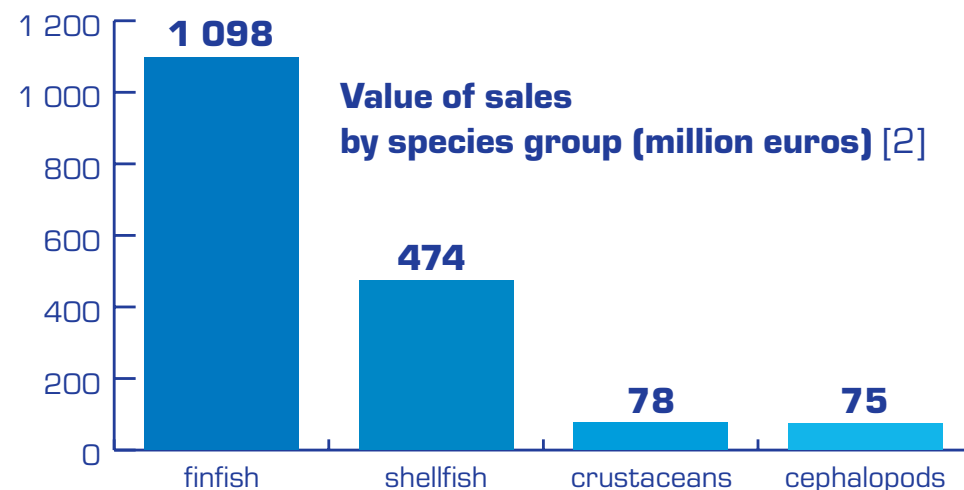
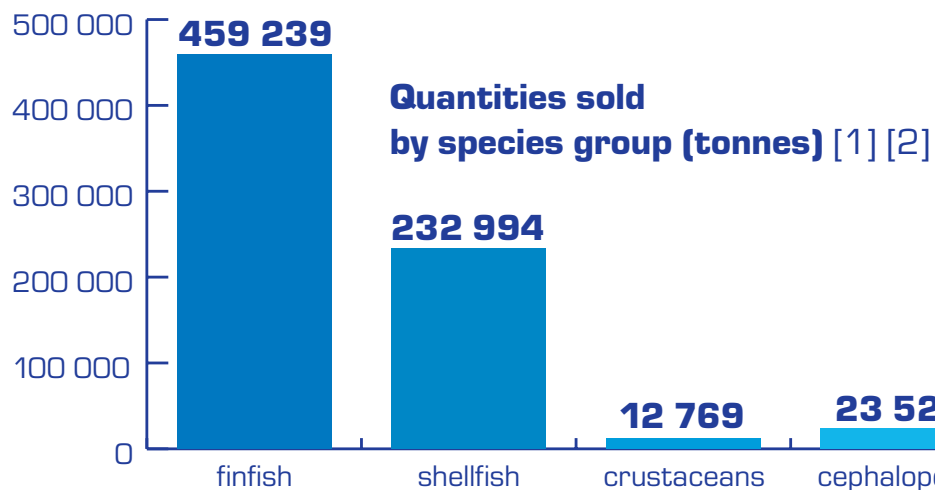
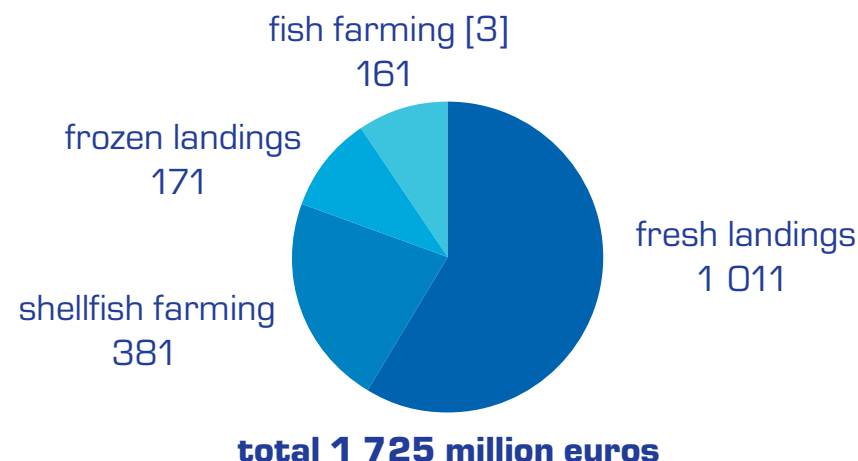
Metropolitan France and overseas territories in 2007

Source : DPMA

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



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



[1] live weight

[2] excluding seaweed

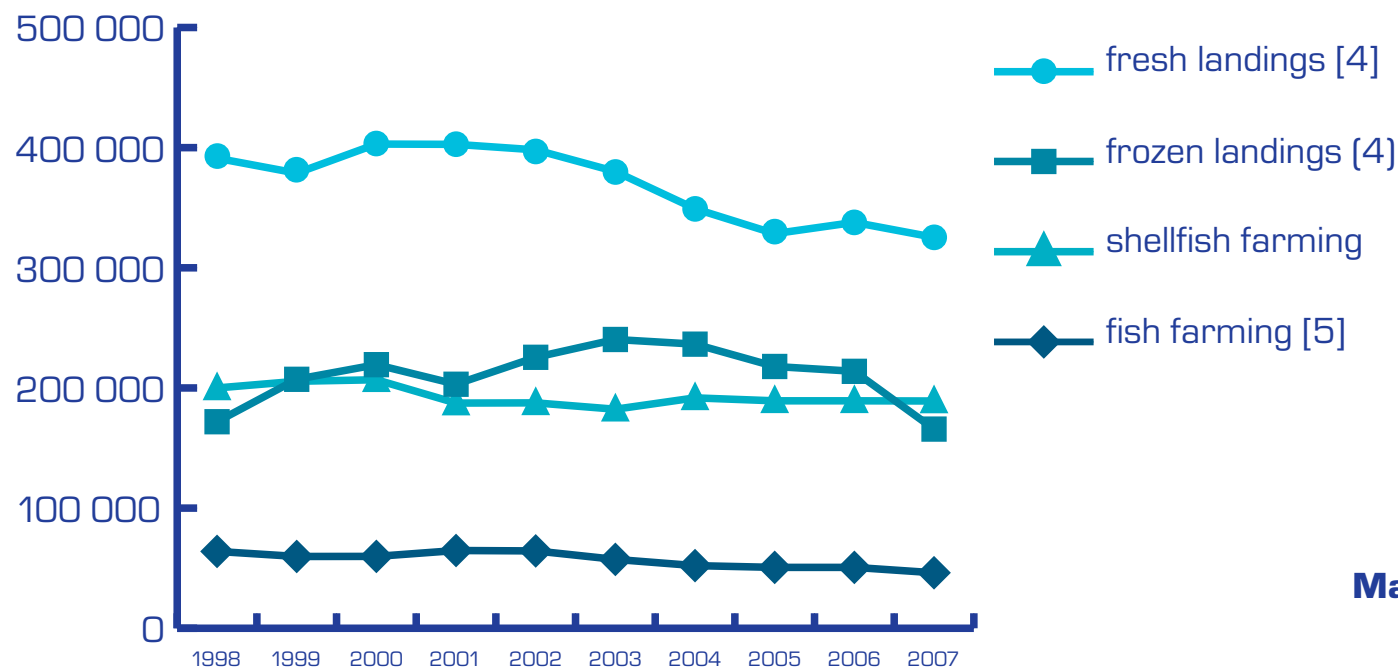
[3] including farmed crustaceans

Total sales of fishery and aquaculture products

Metropolitan France and overseas territories

Source : DPMA

Changes in quantities sold (tonnes) [1] [3]



Quantities sold in 2007 [1] [3]

metropolitan France 703 900 tonnes
overseas territories 24 600 tonnes

Value of sales in 2007 [3]

metropolitan France 1 553 millions euros
overseas territories 172 millions euros

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

tuna	104 562
oyster	112 677
mussel	74 364
sardine	34 611
trout	30 059
great atlantic scallop	22 742
herring	21 930
monkfish	21 779

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

[2] excluding seaweed

[3] excluding overseas territories

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

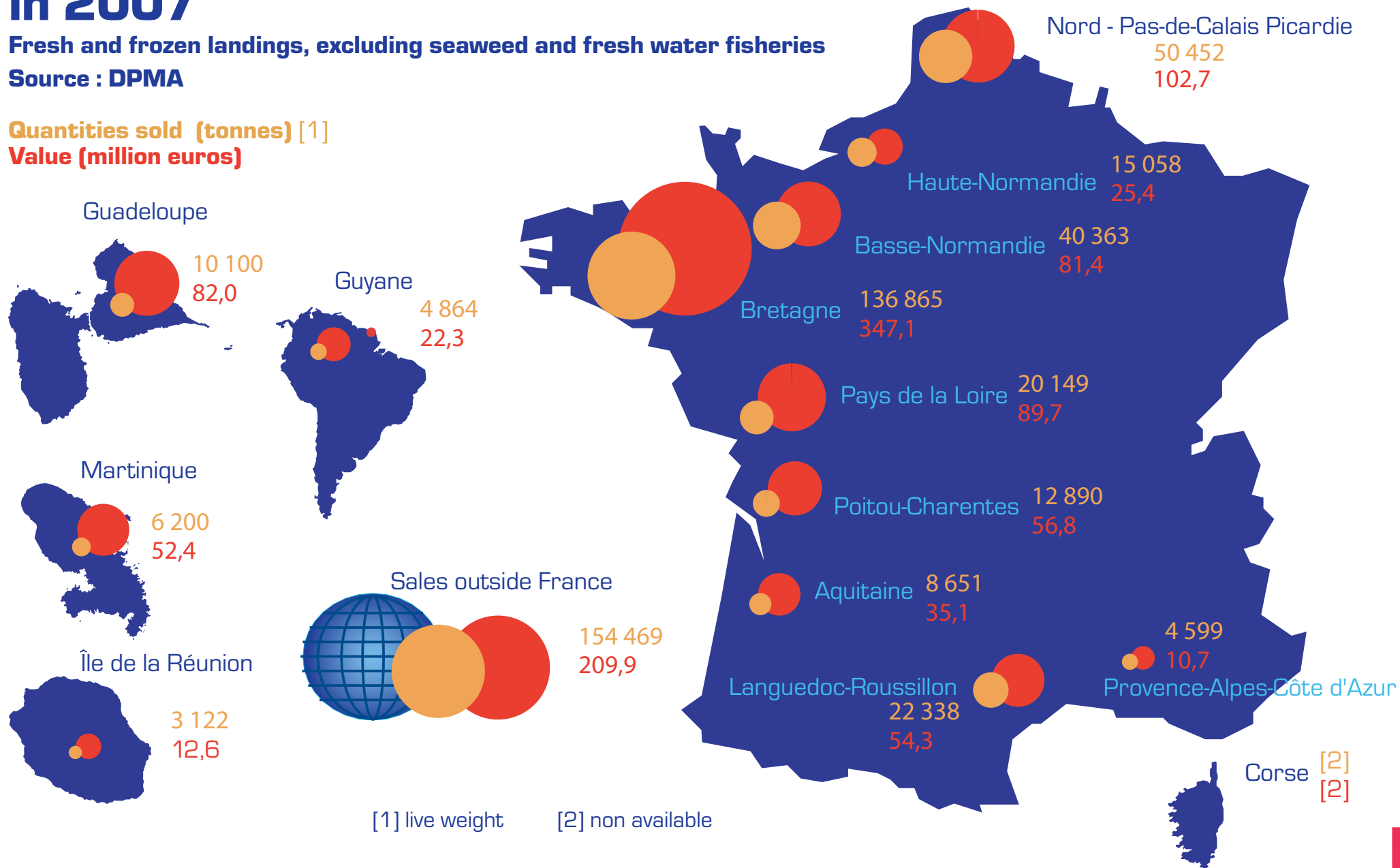
[5] including farmed crustaceans

Breakdown by region of total sales of fishery products in 2007

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 : FranceAgriMer

Number of auctions in 2008 : 40

Sales by French vessels in 2008

Quantities sold	205 025 tonnes
Value of sales	615 million euros

Sales by foreign-registered vessels in 2008

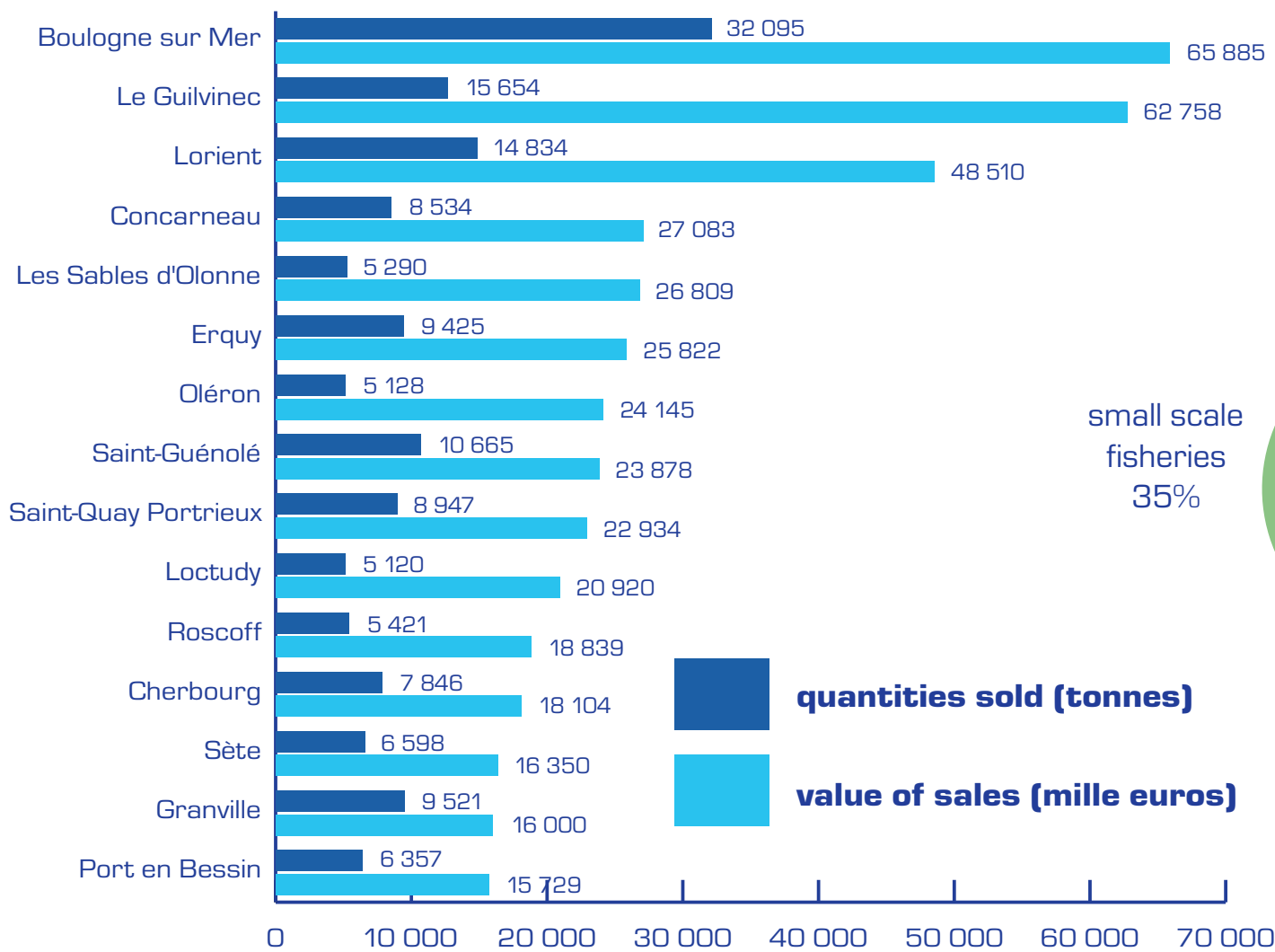
Quantities sold	4 832 tonnes
Value of sales	17 million euros



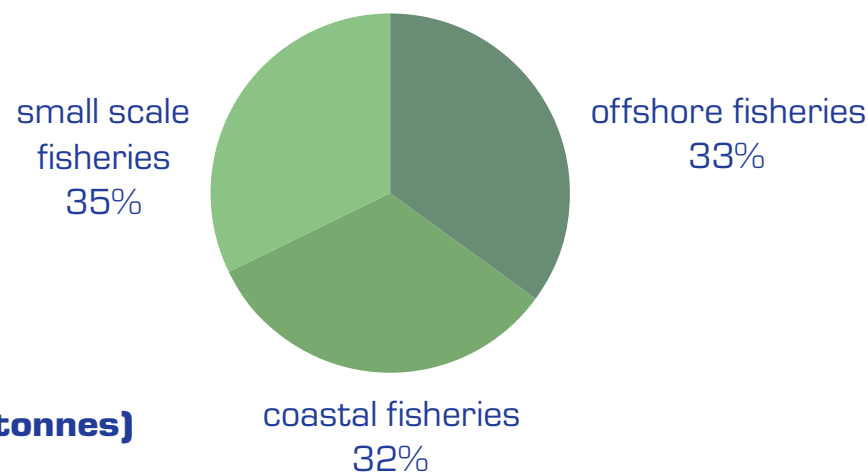
Sales of fishery products at auction

Quantities sold and value of sales by French vessels at the main auctions in 2008

Source : FranceAgriMer



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

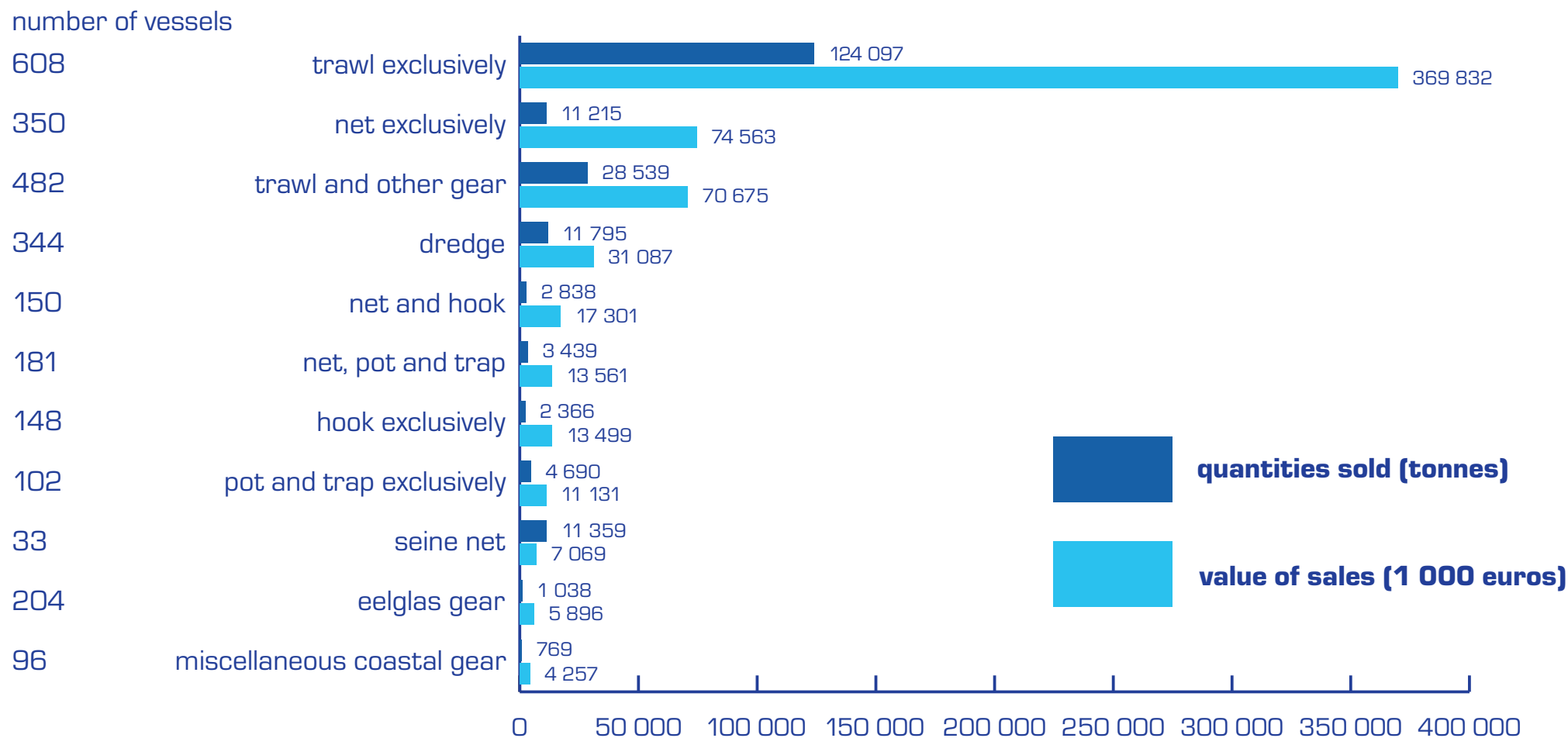


[1] as defined in page 10

Sales of fishery products at auction

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

Source : FranceAgriMer / IFREMER



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

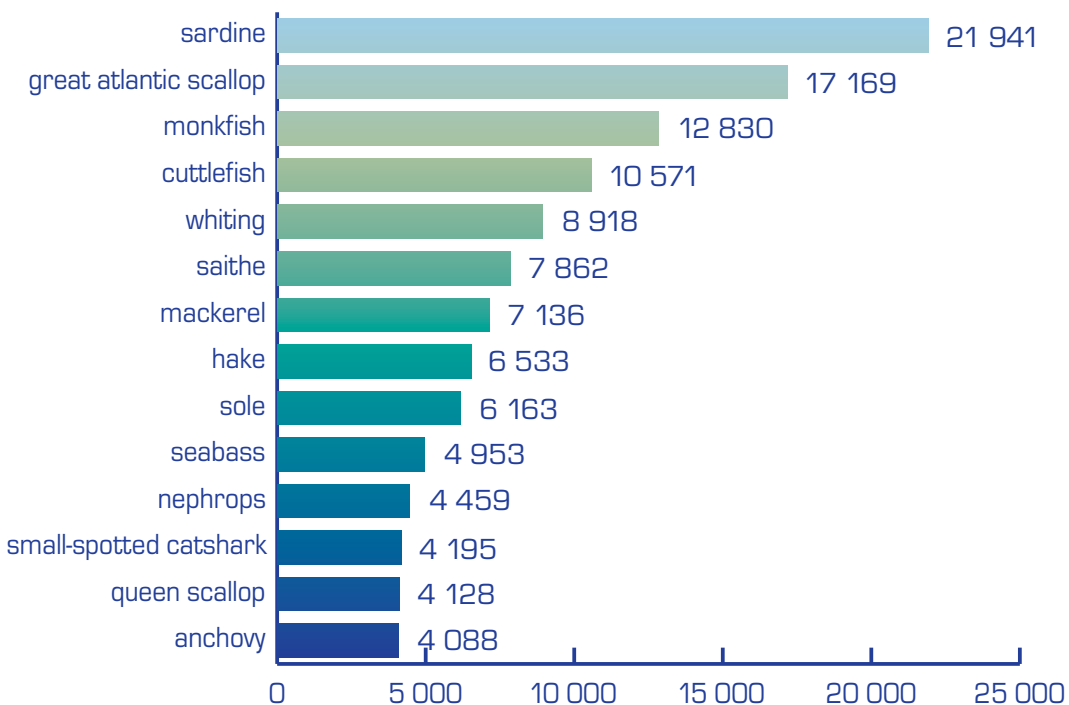
[2] excluding Mediterranean sea

Sales of fishery products at auction

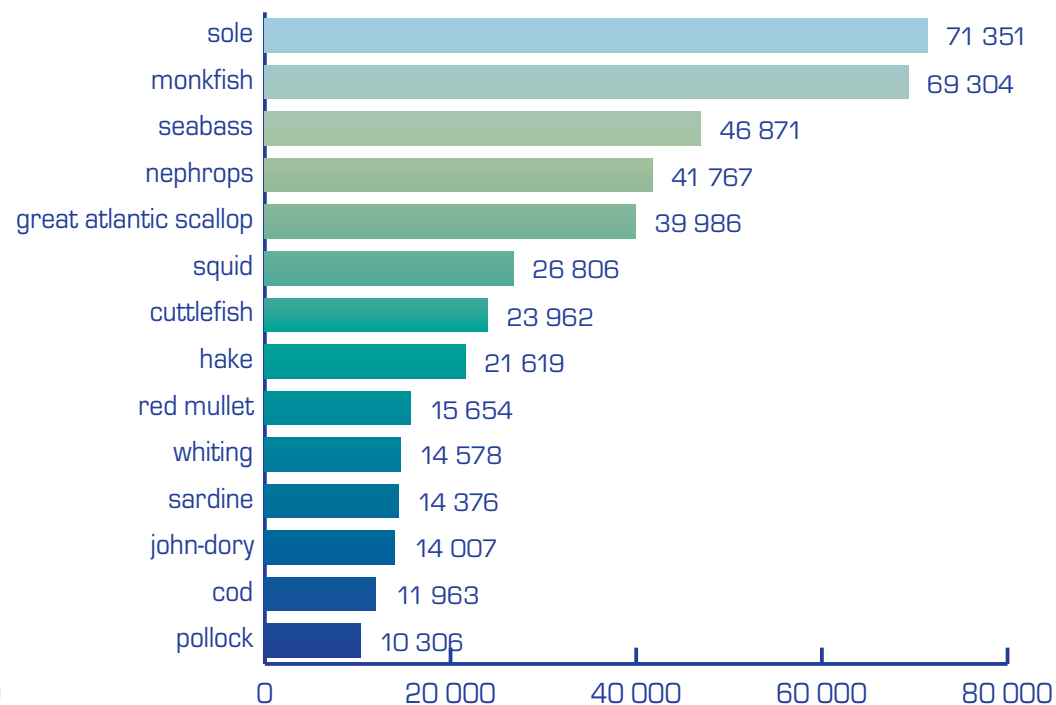
Main species sold by French vessels in 2008

Source : FranceAgriMer

Quantities sold (tonnes)



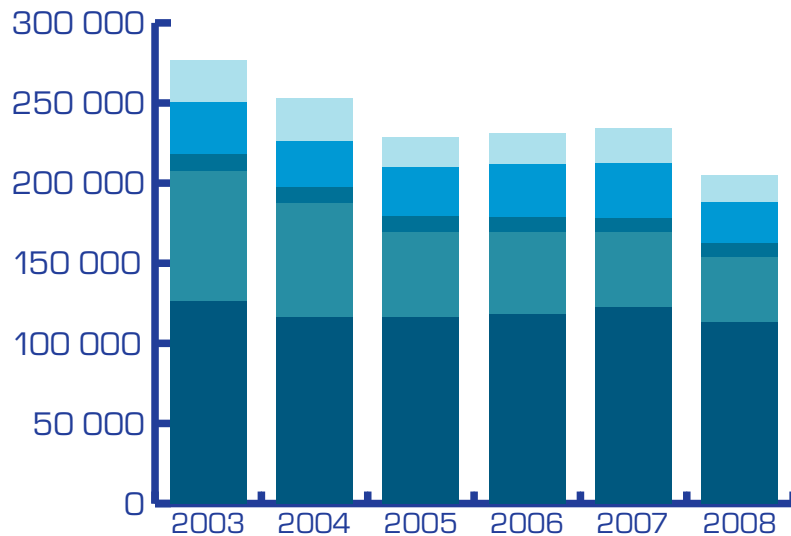
Value (1 000 euros)



Sales of fishery products at auction

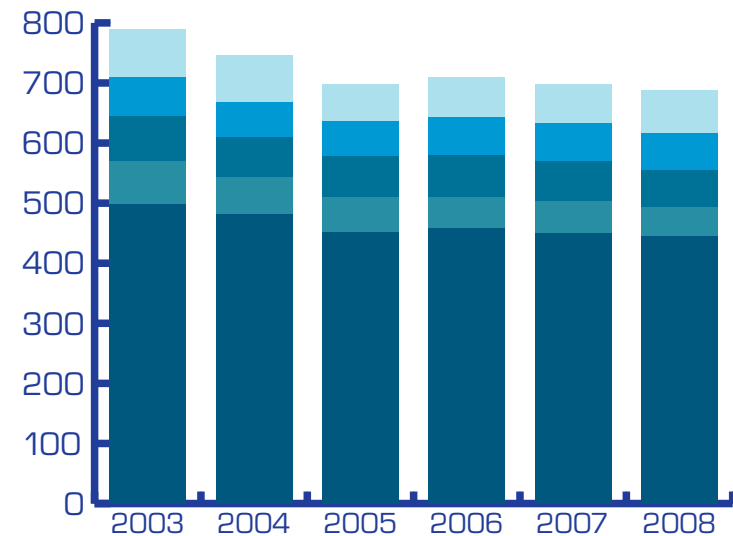
Source : FranceAgriMer

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



- cephalopods
- bivalves
- crustaceans
- tuna and small pelagics
- other fish

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



- cephalopods
- bivalves
- crustaceans
- tuna and small pelagics
- other fish

Sales of aquaculture products

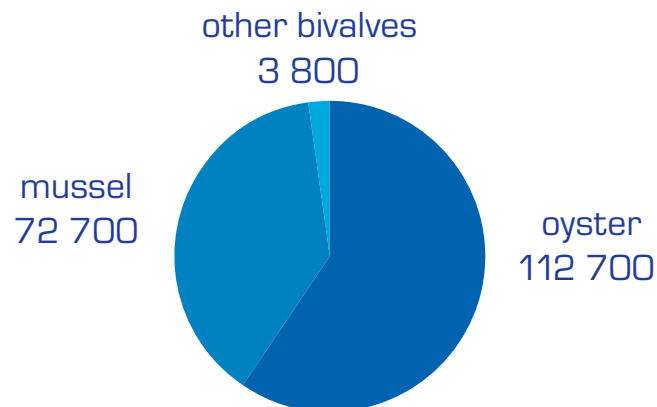
Metropolitan France

Source : DPMA

Quantities sold in 2007 (tonnes) [1]

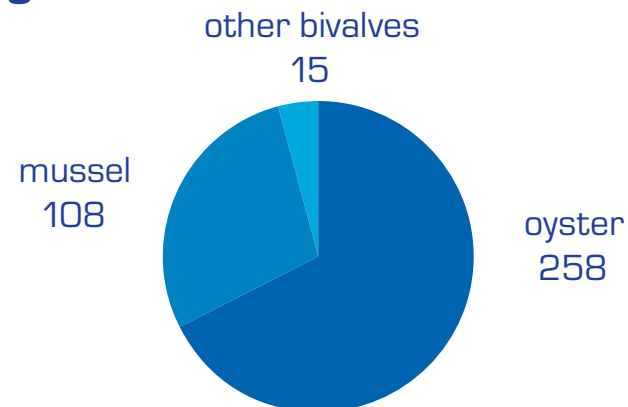
total : 235 400 tonnes

shellfish farming

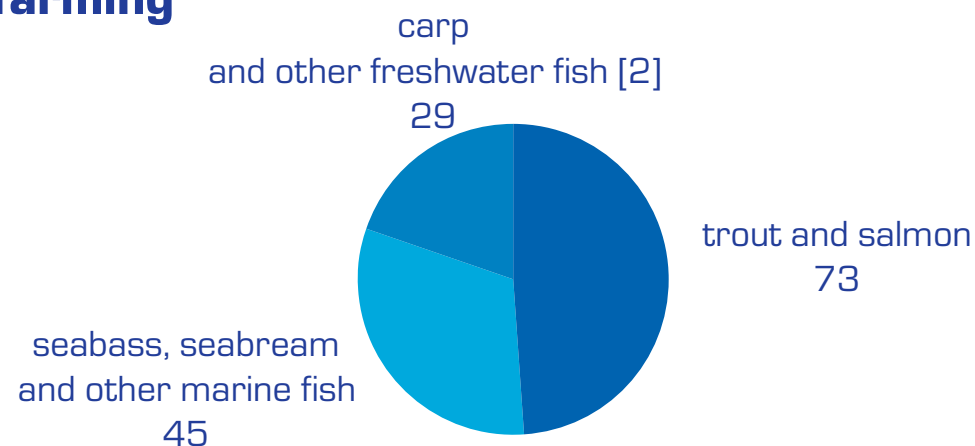
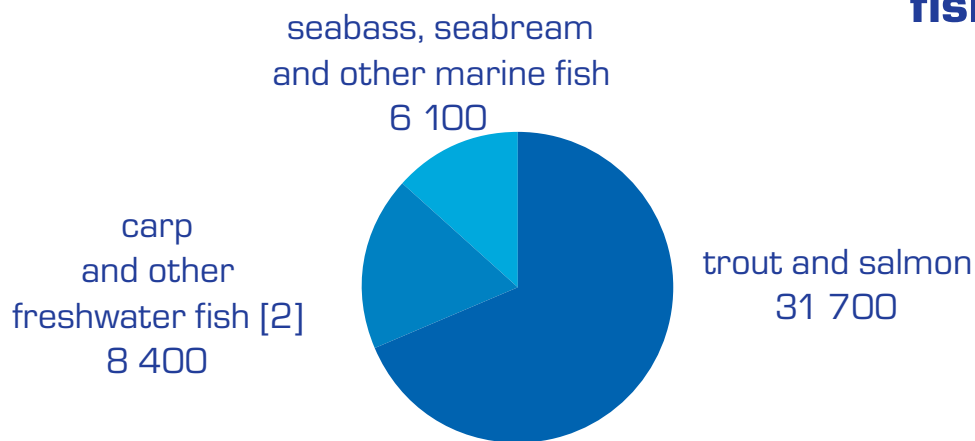


Value of sales in 2007 (million euros)

total : 527 million euros



fish farming



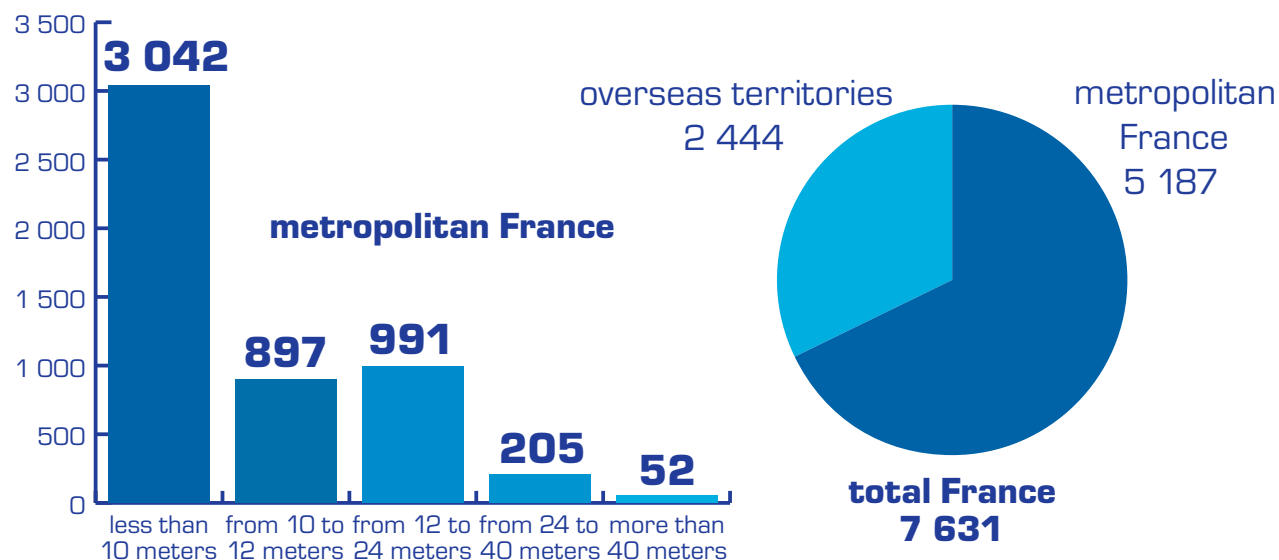
[1] live weight

[2] including farmed crustaceans

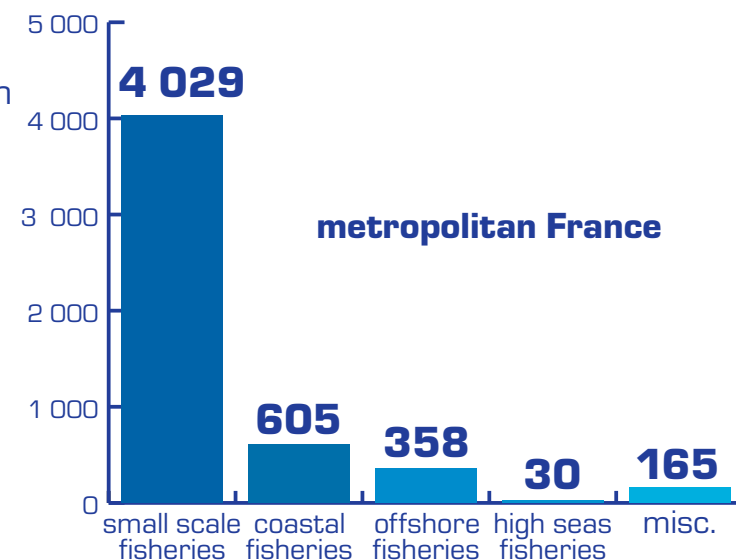
Fishing fleet in 2007 [1]

Source : SDSIM / Fichier BARPOP

Breakdown of total vessels by length



Breakdown of total vessels by fishery category



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

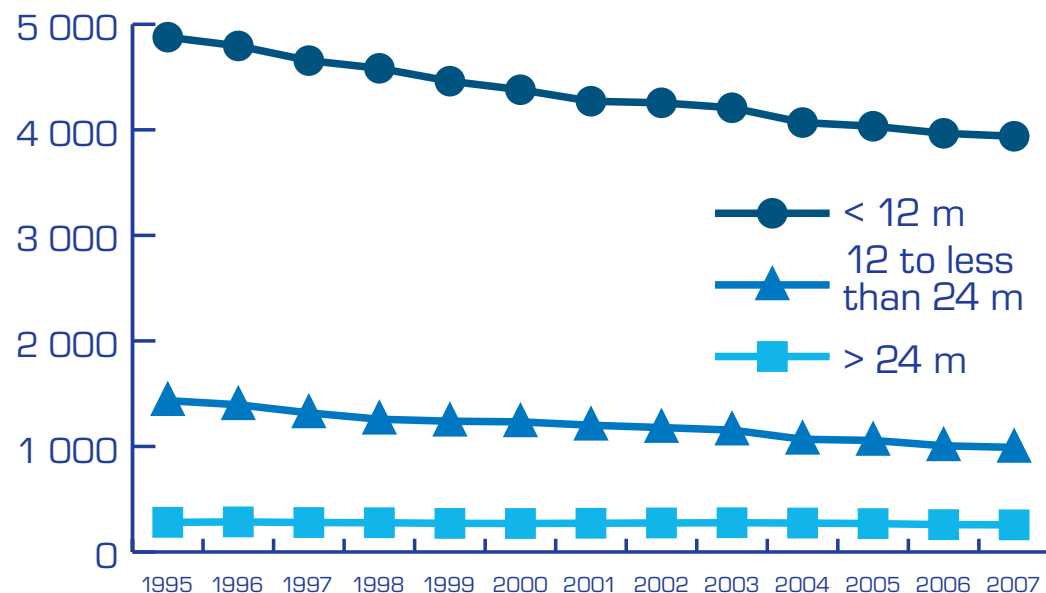
Vessels over 1 000 GRT or vessels over 150 GRT if out of port > 20 days

[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 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

Aquaculture firms

Source : DPMA (aquaculture survey 2007)

Number of aquaculture firms in 2007

shellfish farming (including seaweed and shrimps)	3 160
marine fish farming	50
fresh water fish farming (excluding pond aquaculture)	461

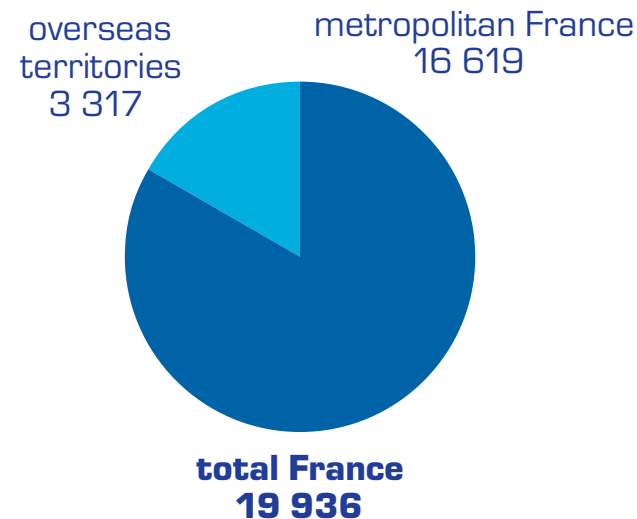
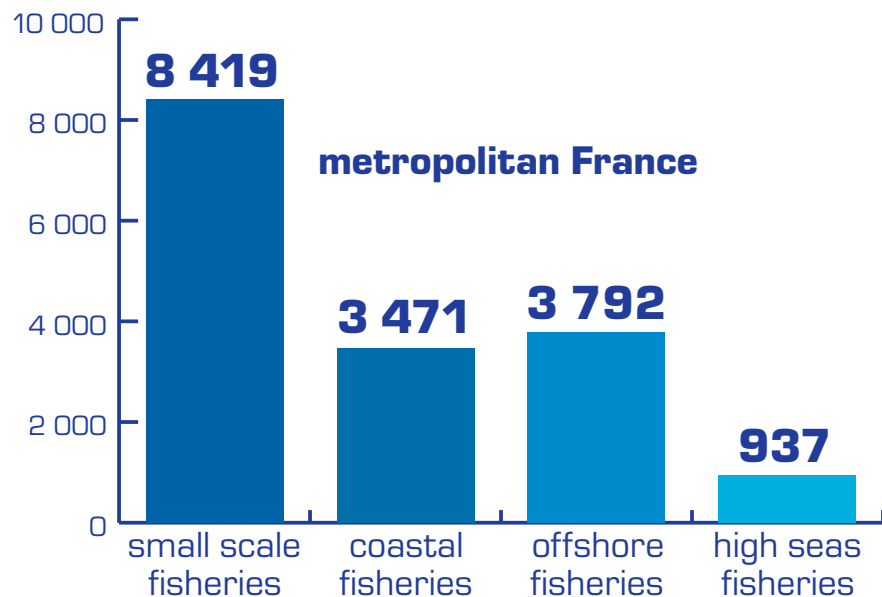
[1] excluding vessels engaged in aquaculture and small scale fisheries

Jobs

Number of seamen employed on board French fishing vessels in 2007

(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

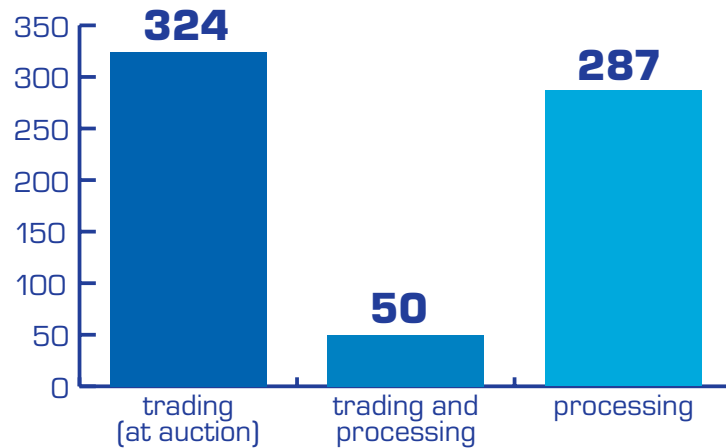
fisheries in 2006 [1]	9 782
shellfish farming (including seaweed and shrimps) in 2007	9 100
marine fish farming in 2007	650
fresh water fish farming (excluding pond aquaculture) in 2007	1 430

[1] excluding Mediterranean sea

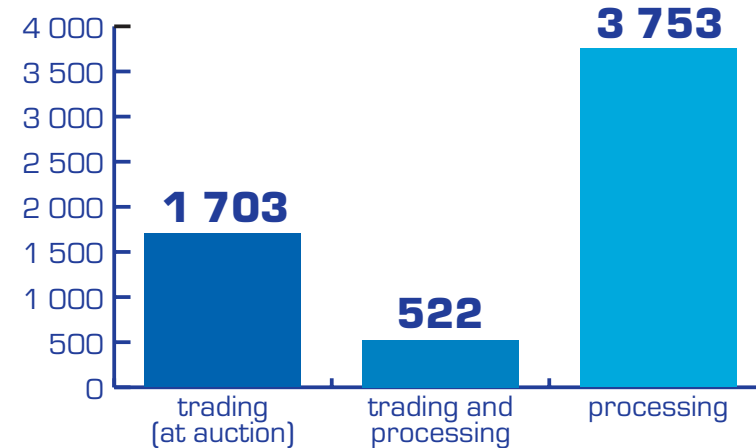
Economic data 2006

Source : FranceAgriMer

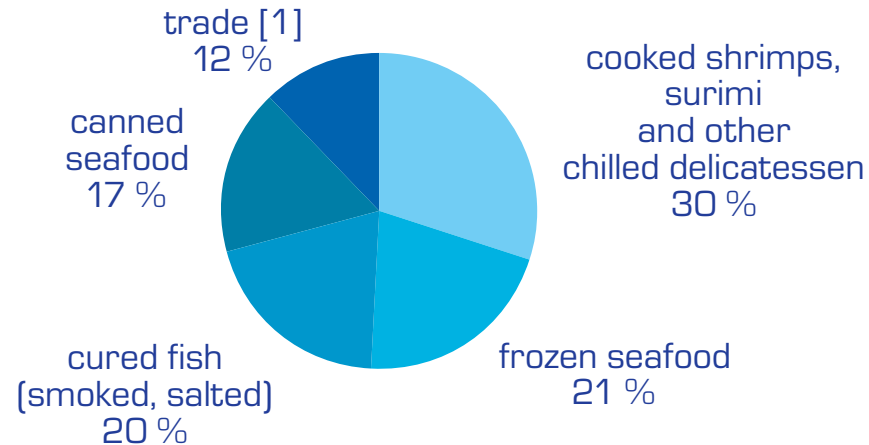
Total number of firms



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

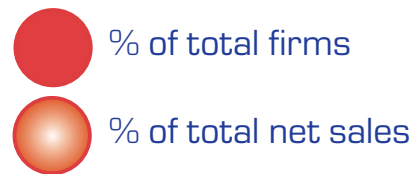
trading	5 500
processing	13 000

[1] including trade of canned or frozen seafood

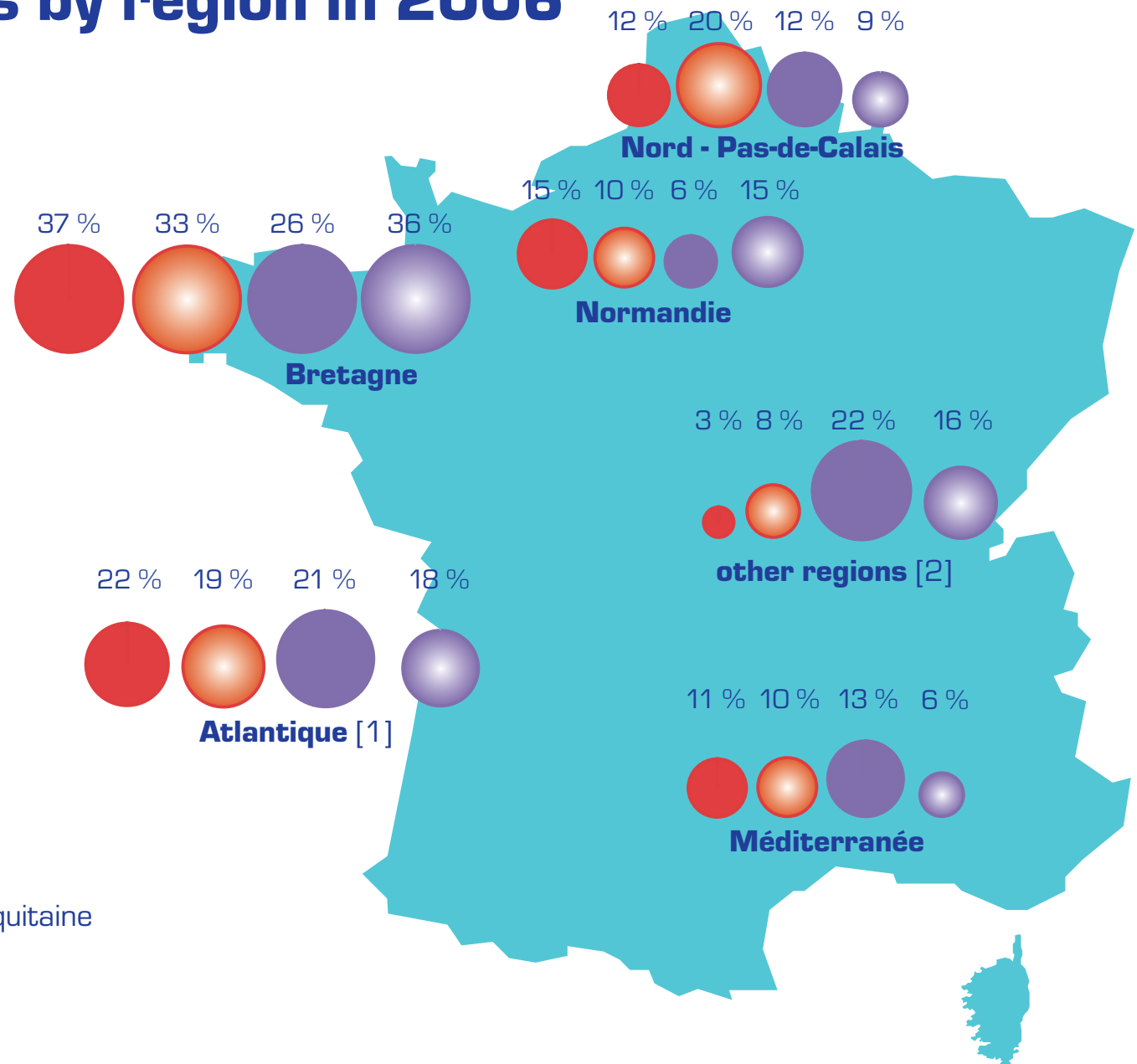
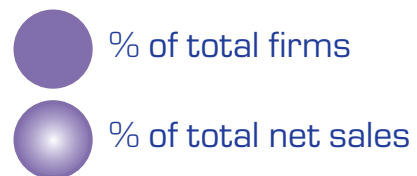
Breakdown of the total number of firms and total net sales by region in 2006

Source : FranceAgriMer

Trading (including trading and processing)



Processing



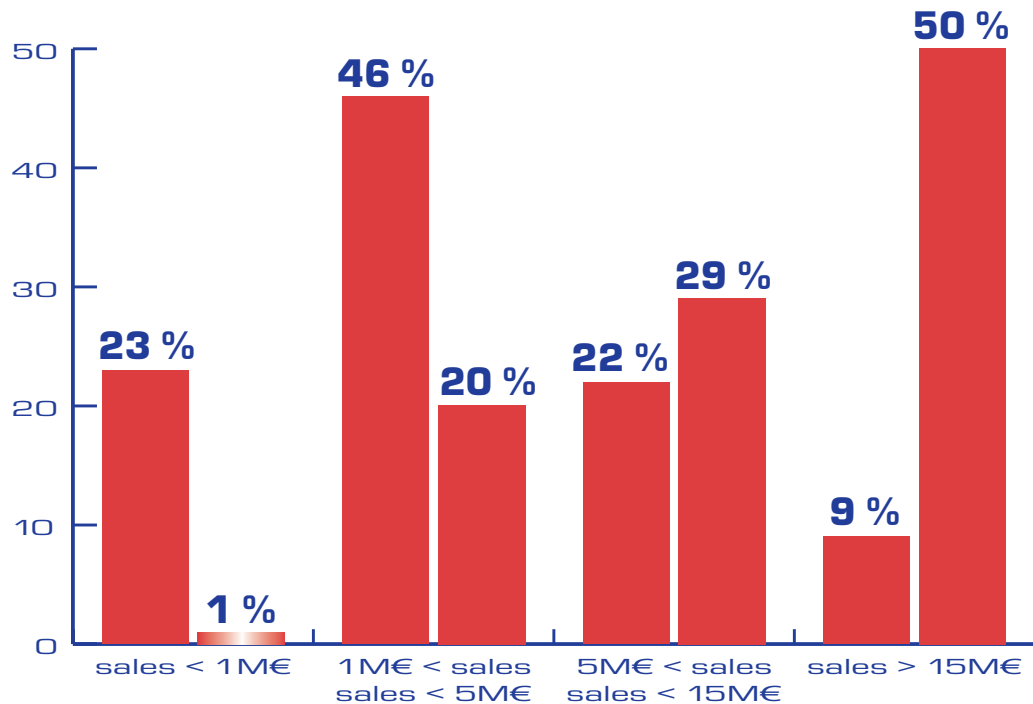
[1] Pays de la Loire, Poitou-Charentes, Aquitaine

[2] including overseas territories

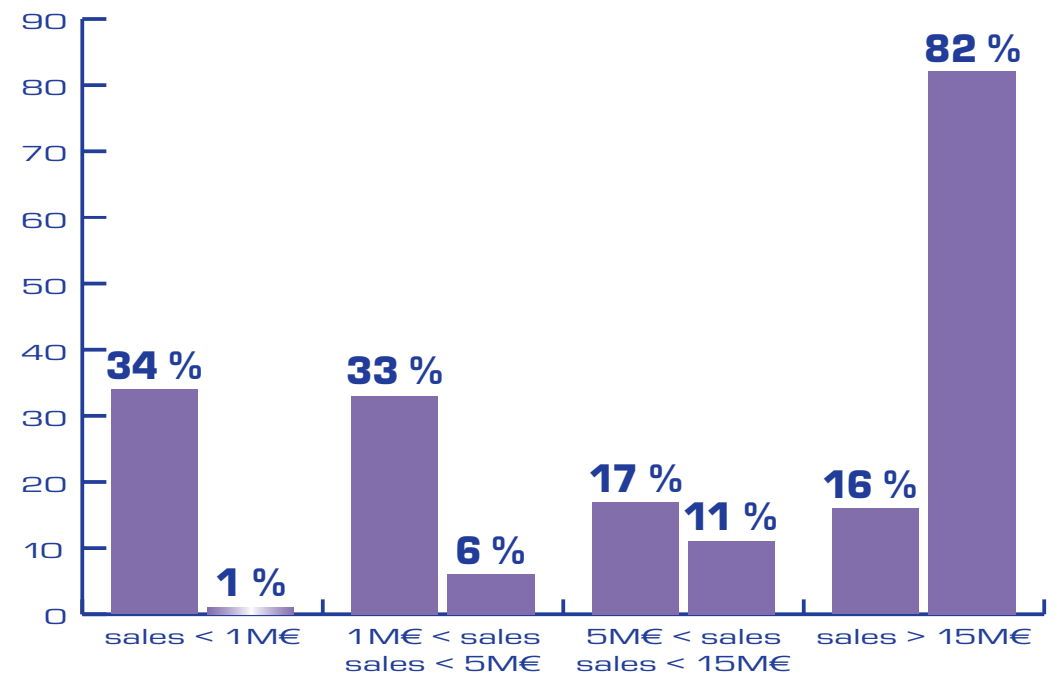
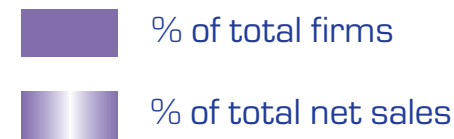
Breakdown of total number of firms and total net sales by size class in 2006

Source : FranceAgriMer

Trading (including trading and processing)



Processing

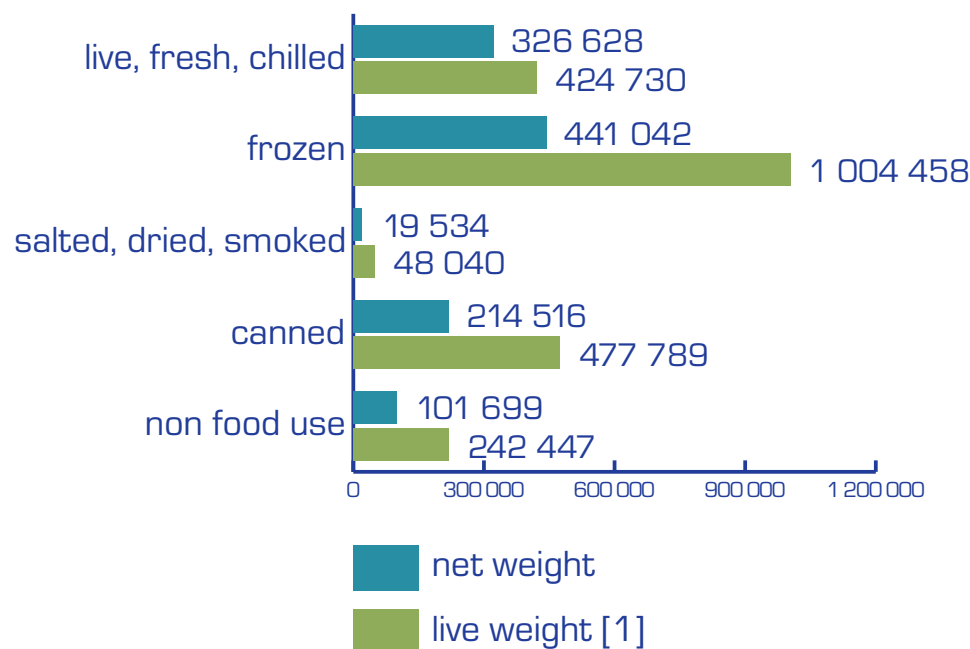


Imports of aquatic products by presentation in 2008

Metropolitan France and overseas territories

Source : DNSCE

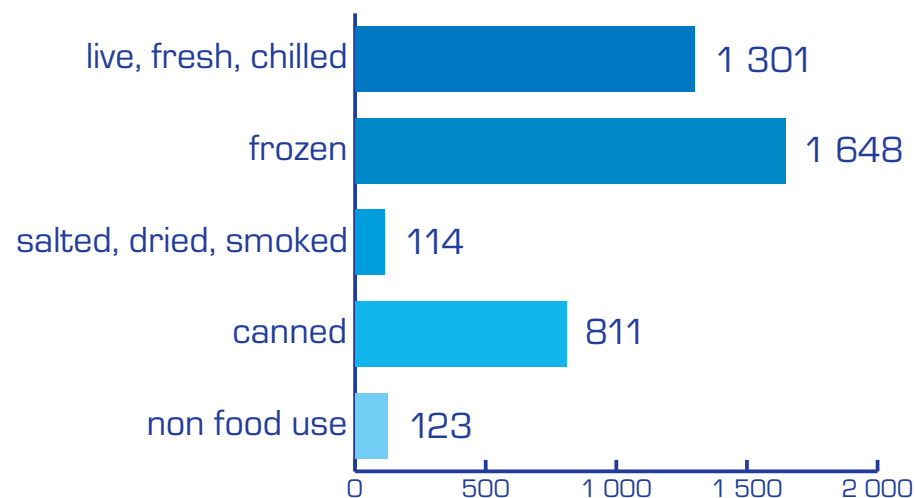
Imports by volume (tonnes)



total net weight : 1 103 419 tonnes

total live weight : 2 197 465 tonnes

Imports by value (million euros)



total : 3 997 million euros

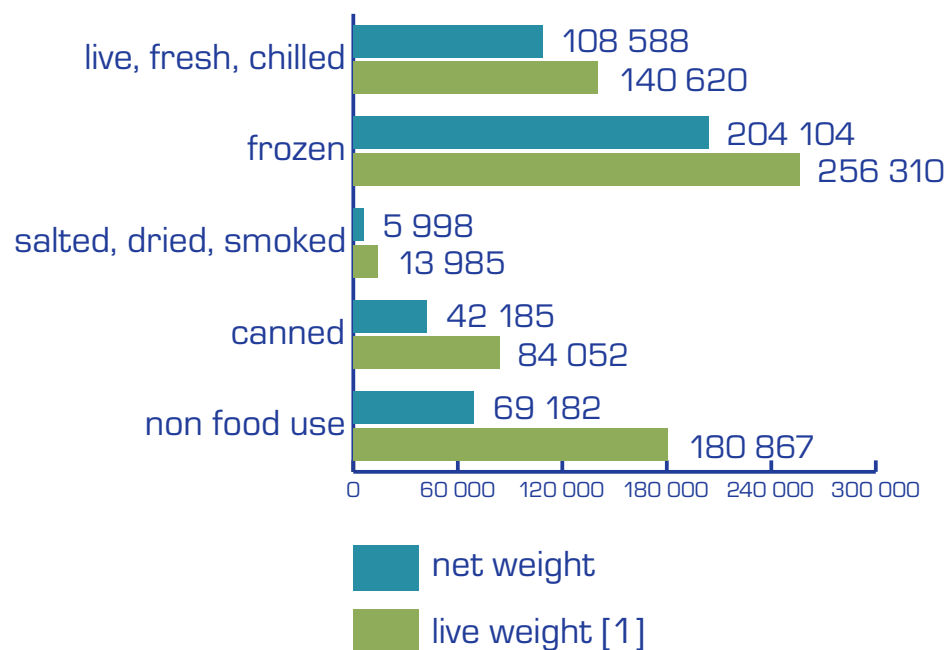
[1] data collection methodology is detailed on inside back cover

Exports of aquatic products by presentation in 2008

Metropolitan France and overseas territories

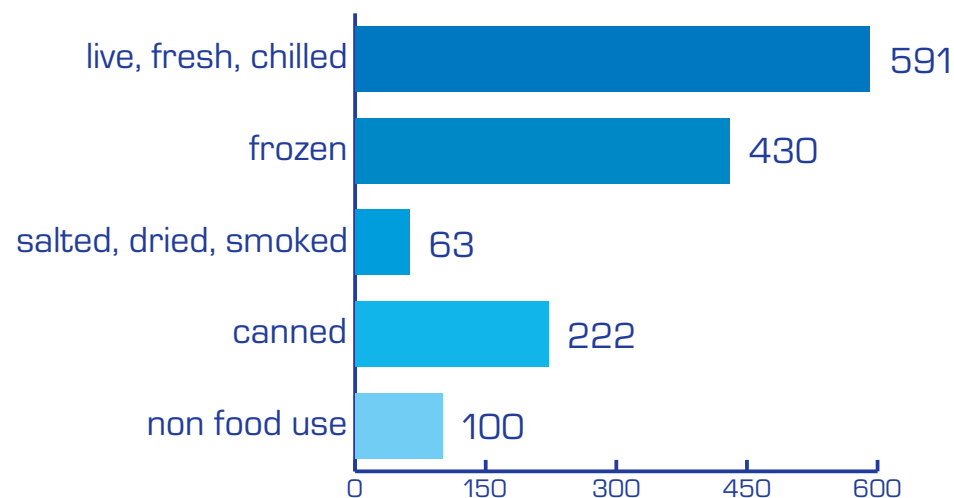
Source : DNSCE

Exports by volume (tonnes)



total net weight : 430 057 tonnes
total live weight : 675 834 tonnes

Exports by value (million euros)



total : 1 406 million euros

Trade gap : 2 591 million euros

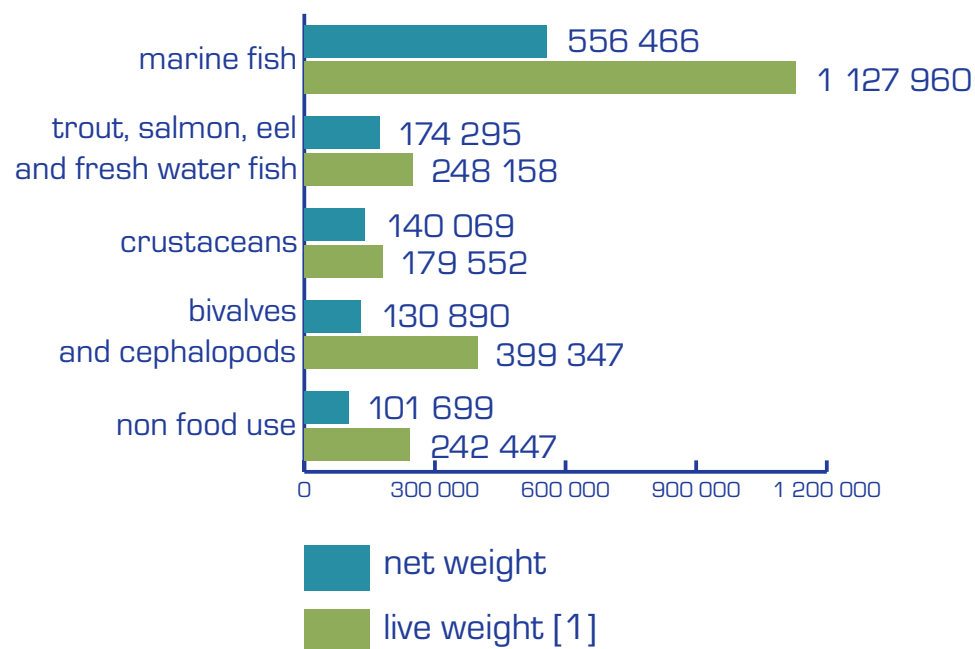
[1] data collection methodology is detailed on inside back cover

Imports of aquatic products by species group in 2008

Metropolitan France and overseas territories

Source : DNSCE

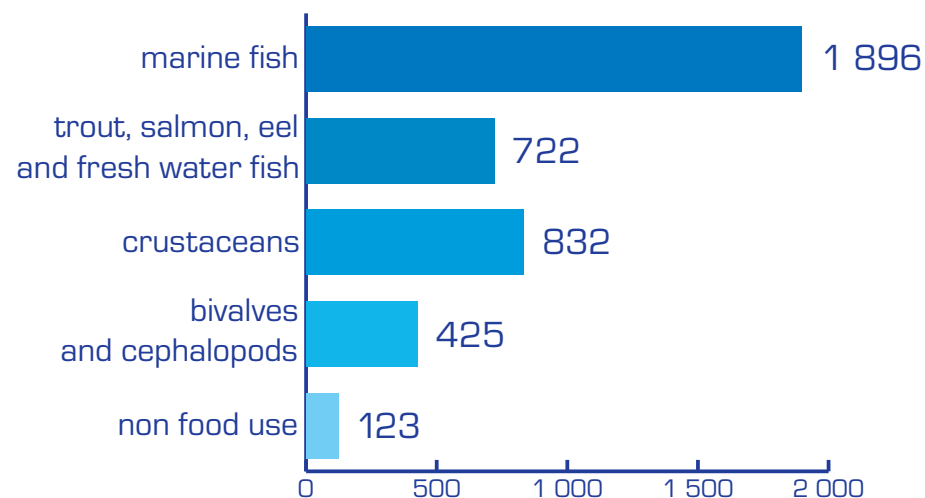
Imports by volume (tonnes)



total net weight : 1 103 419 tonnes

total live weight : 2 197 465 tonnes

Imports by value (million euros)



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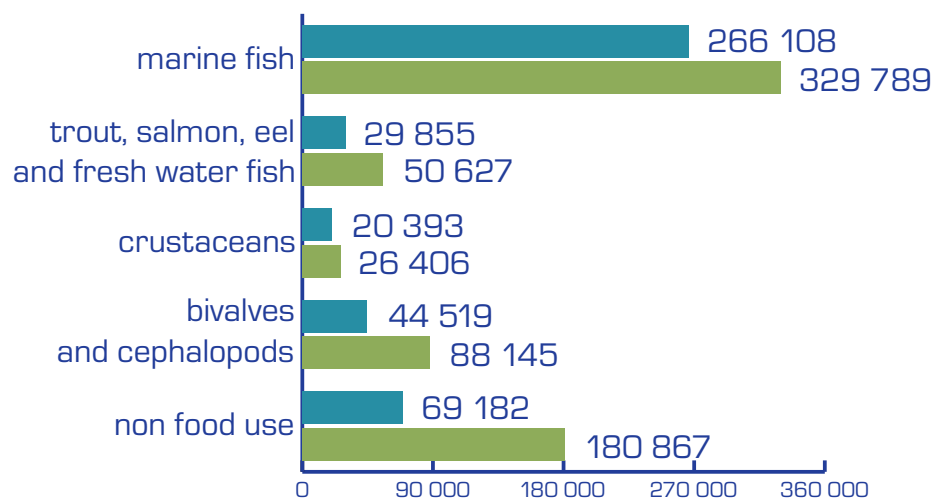
[1] data collection methodology is detailed on inside back cover

Exports of aquatic products by species group in 2008

Metropolitan France and overseas territories

Source : DNSCE

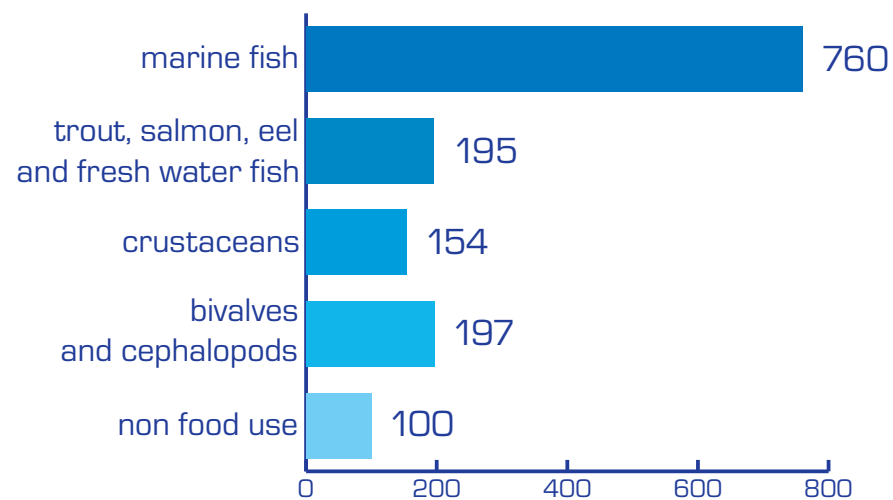
Exports by volume (tonnes)



net weight
live weight [1]

total net weight : 430 057 tonnes
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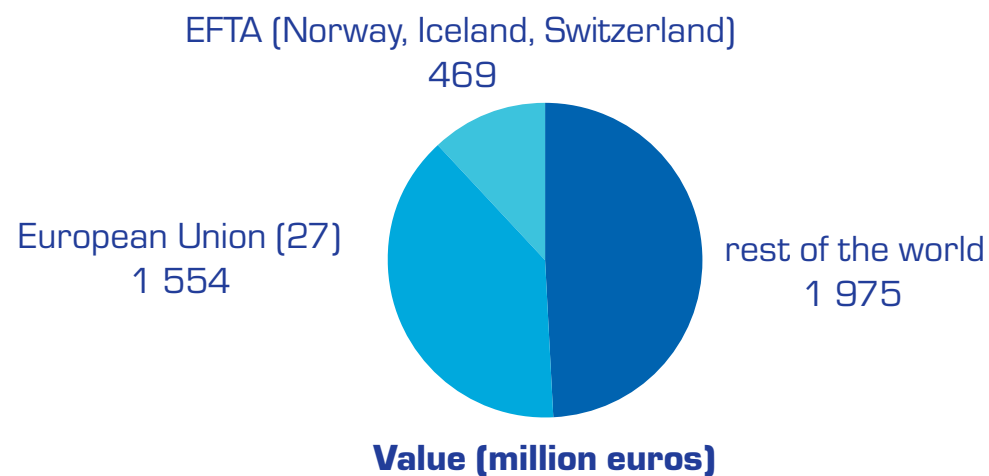
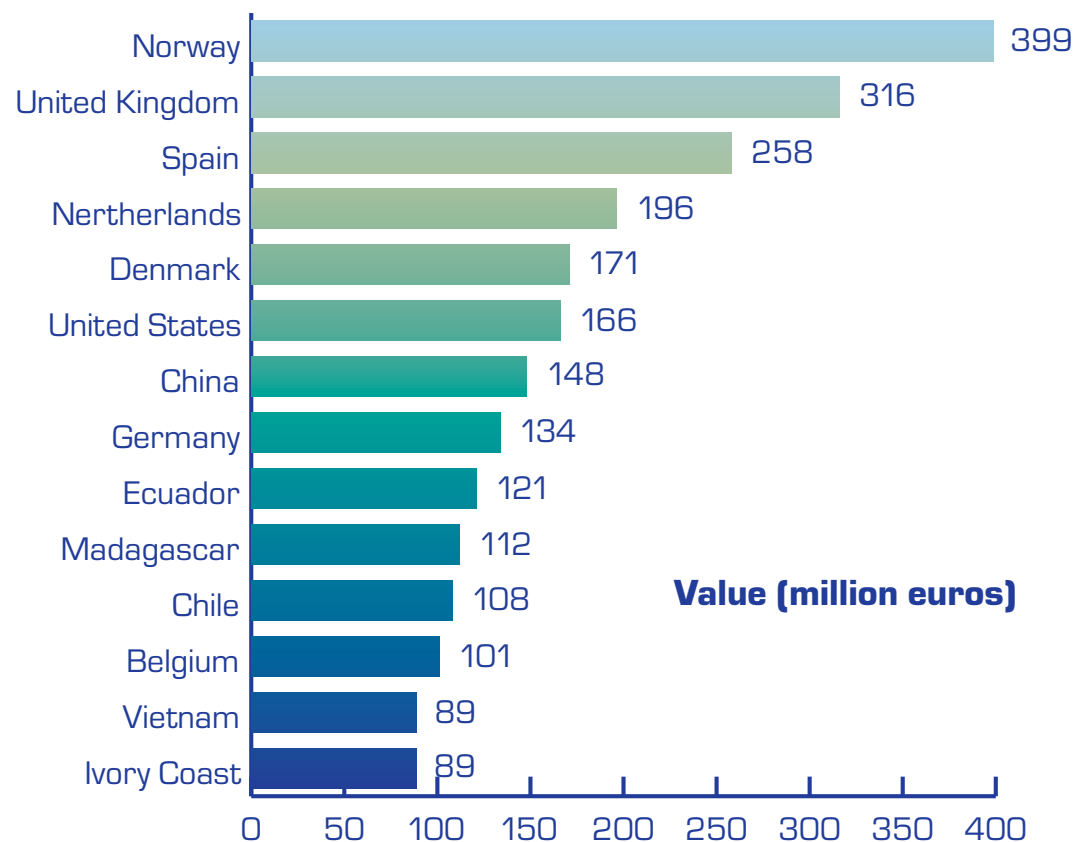
Trade gap : 2 591 million euros

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

Imports of aquatic products by geographic origin in 2008

Metropolitan France and overseas territories

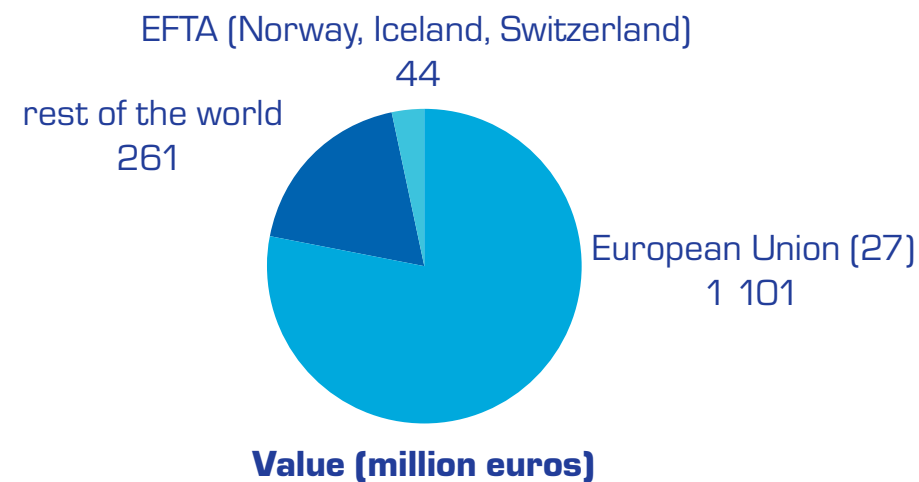
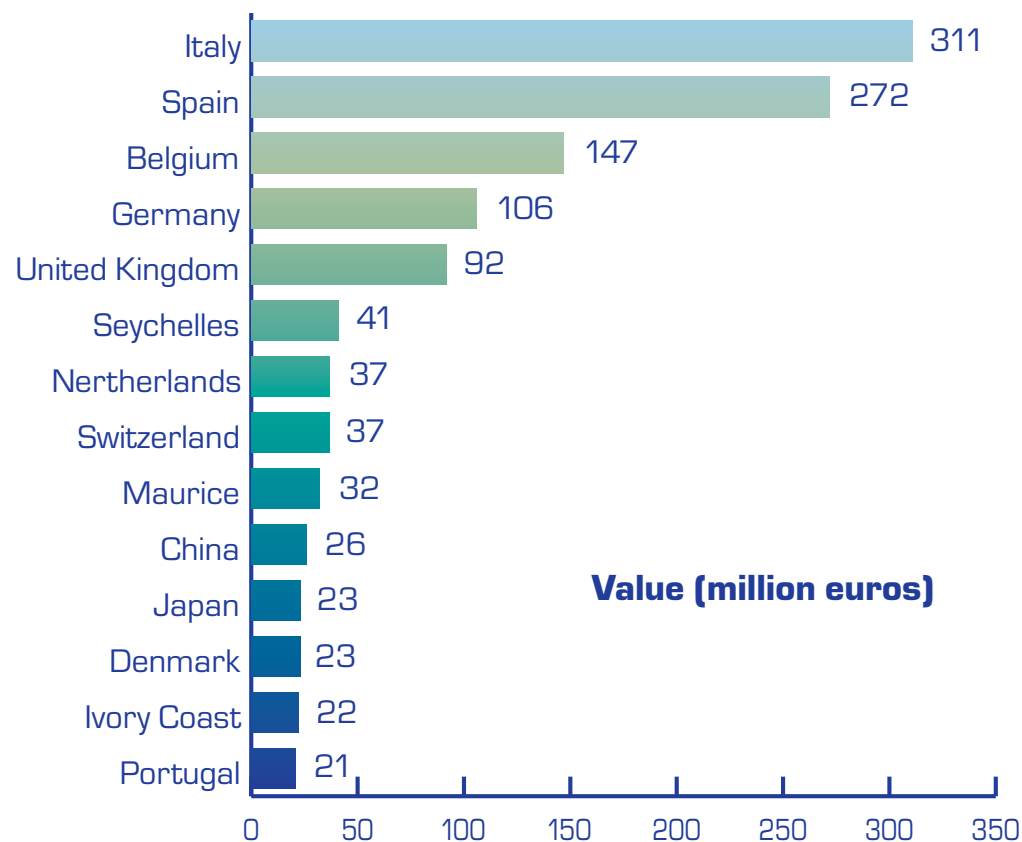
Source : DNSCE



Exports of aquatic products by destination in 2008

Metropolitan and overseas territories

Source : DNSCE



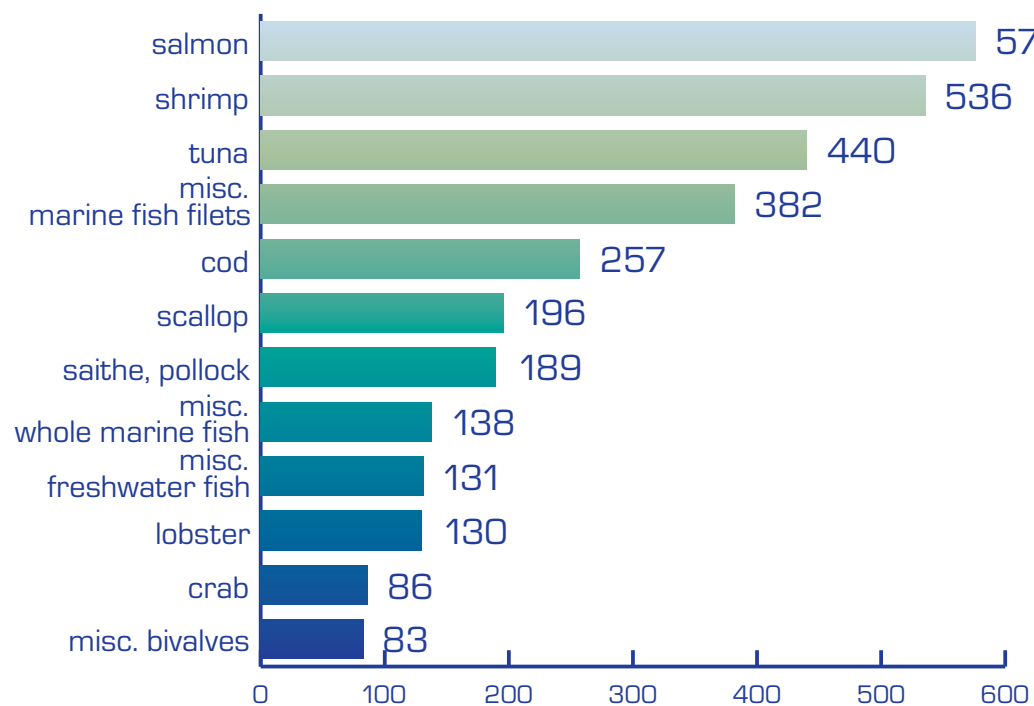
Imports and exports of aquatic products

Main species in 2008

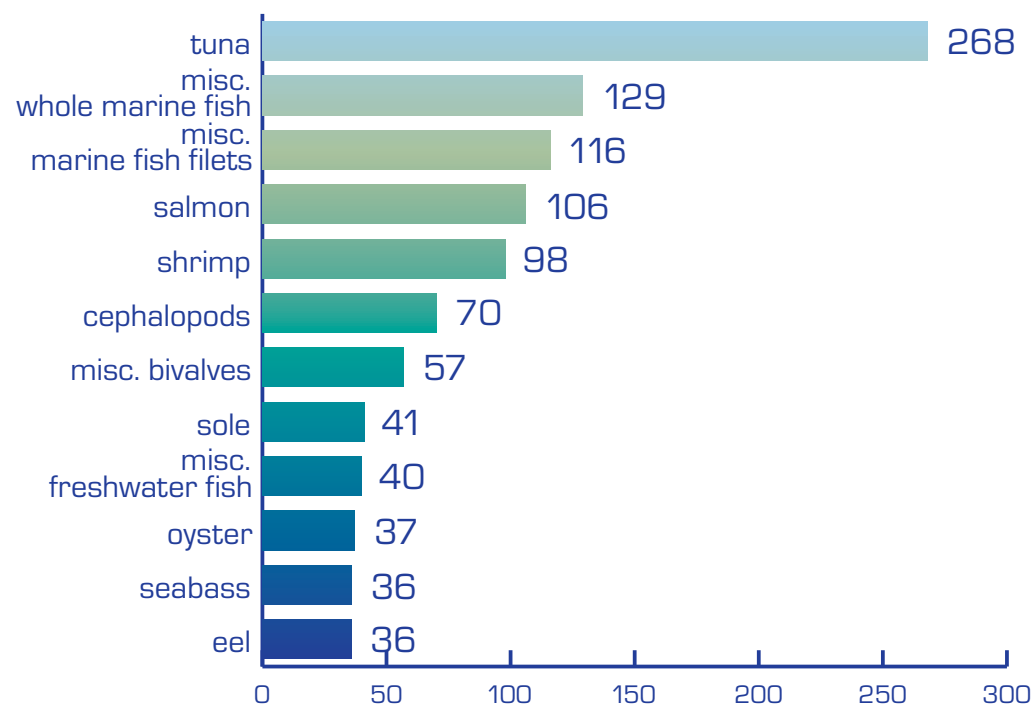
Metropolitan France and overseas territories

Source : DNSCE

Imports by value (million euros)



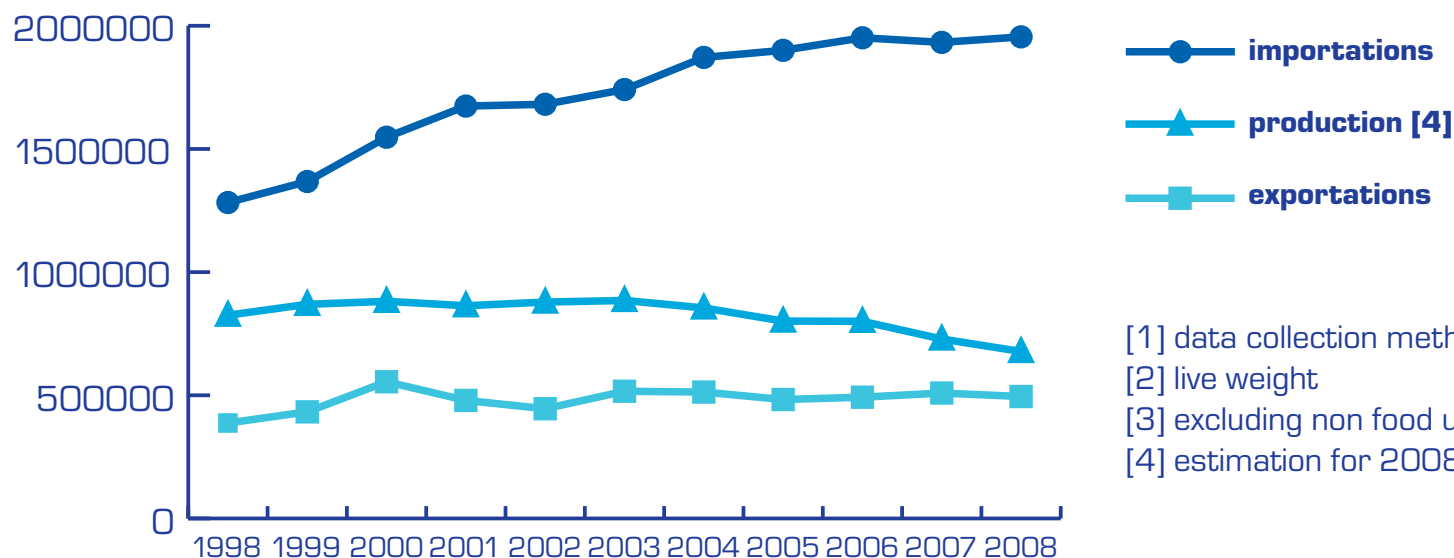
Exports by value (million euros)



Supply balance = Production + Imports - Exports [1]

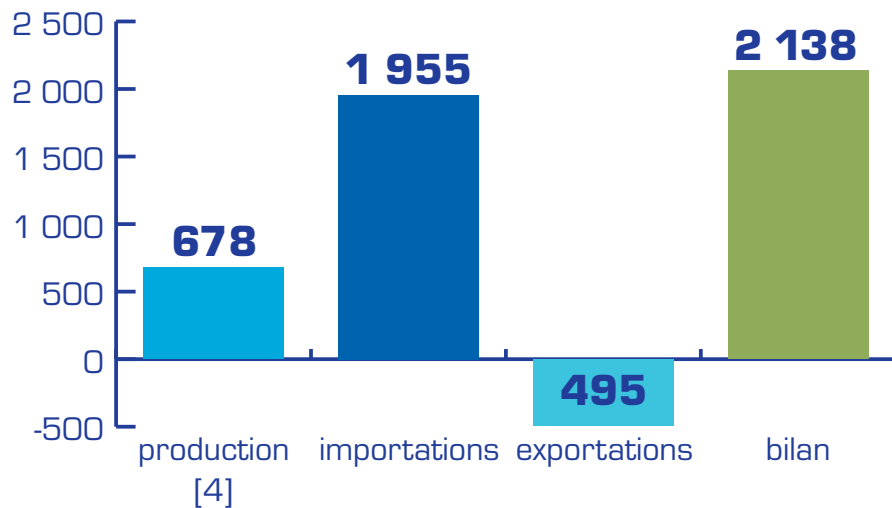
Source : FranceAgriMer

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

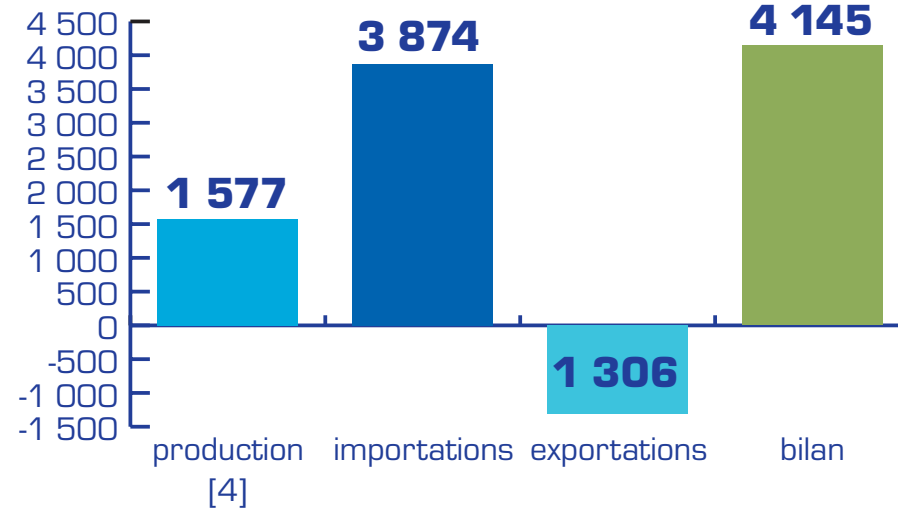


[1] data collection methodology is detailed on inside back cover
 [2] live weight
 [3] excluding non food use
 [4] estimation for 2008

Supply balance in quantities in 2008 (1 000 tonnes)



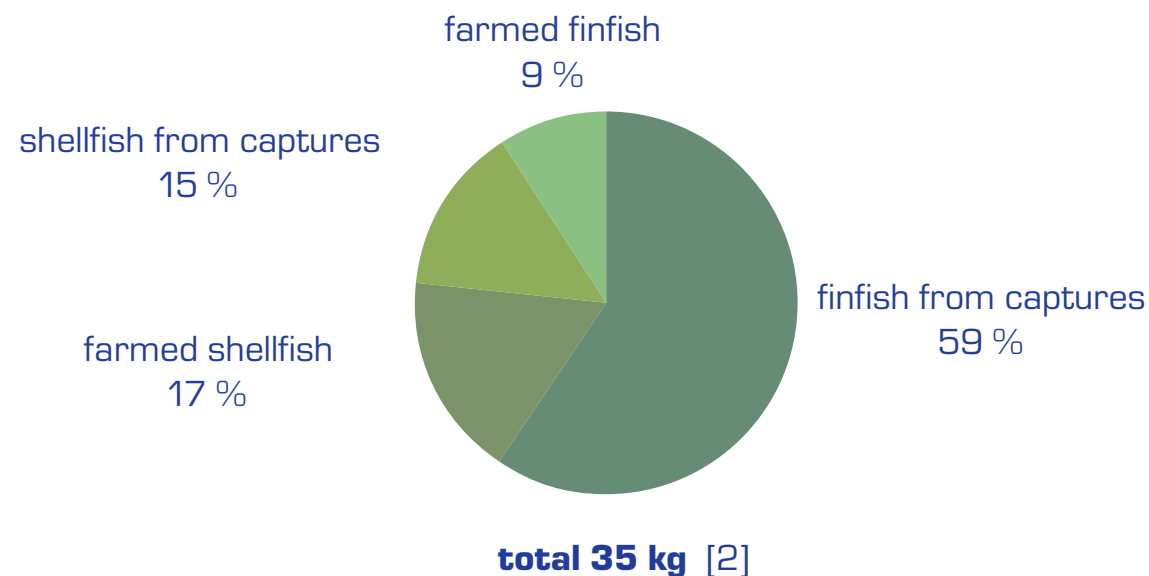
Supply balance in value in 2008 (million euros)



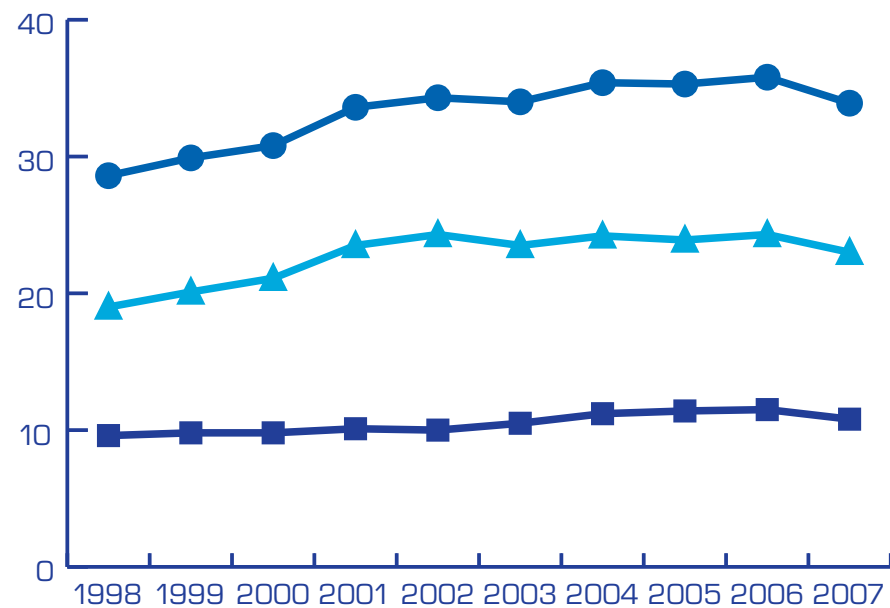
Supply balance per capita and per year [1]

Source : FranceAgriMer

Average 2005-2006-2007



Changes in supply balance (kg) [2]



- total Average growth rate in the last ten years : 2,2 %
- ▲ finfish
- shellfish (bivalves, crustaceans and cephalopods)

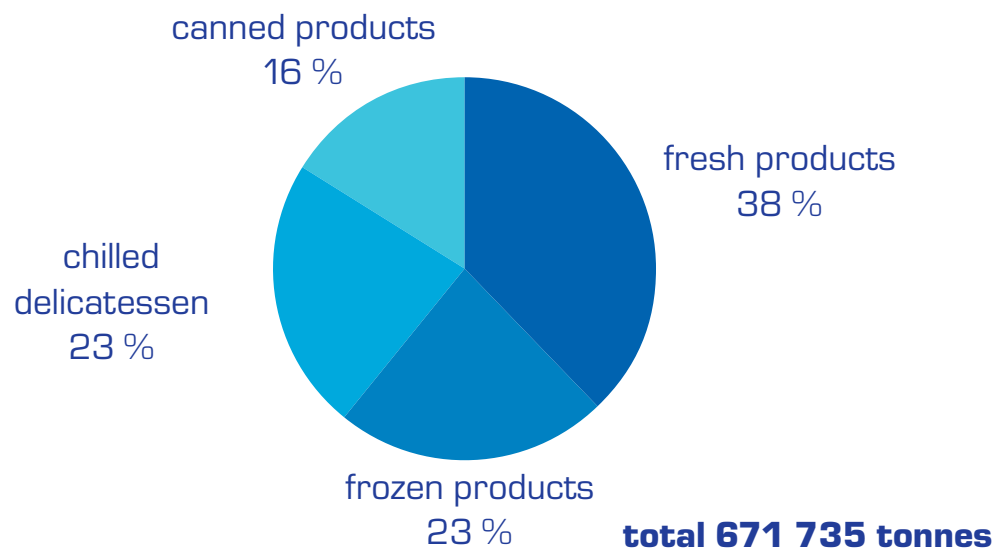
[1] data collection methodology is detailed on inside back cover

[2] live weight

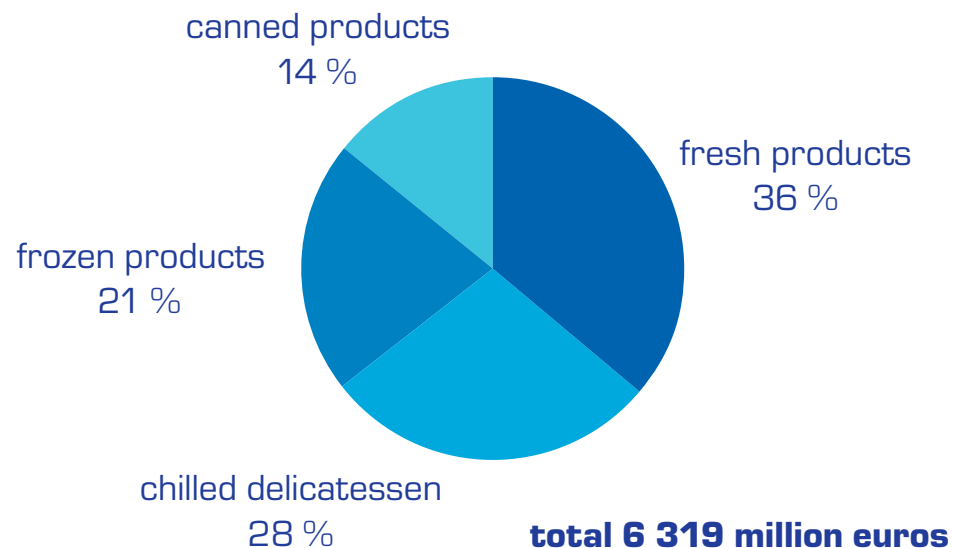
Purchases of aquatic products by French households for home consumption in 2008 [1]

Source : FranceAgriMer / TNS

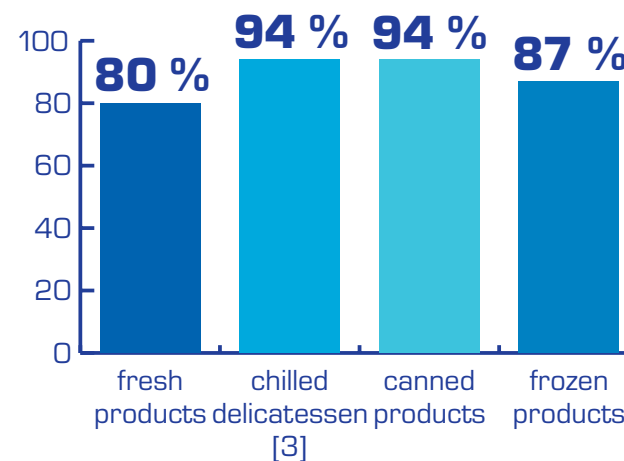
Quantities purchased [2]



Household spending



Percentage of purchasing households



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

[2] net weight

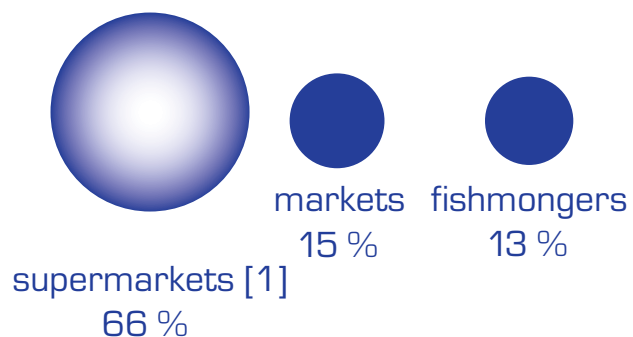
[3] with bar code

Purchases of aquatic products by French households for home consumption in 2008

Source : FranceAgriMer / TNS

Market shares value of distribution channels by presentation

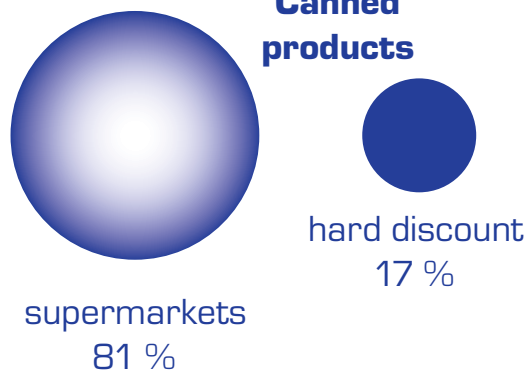
Fresh products



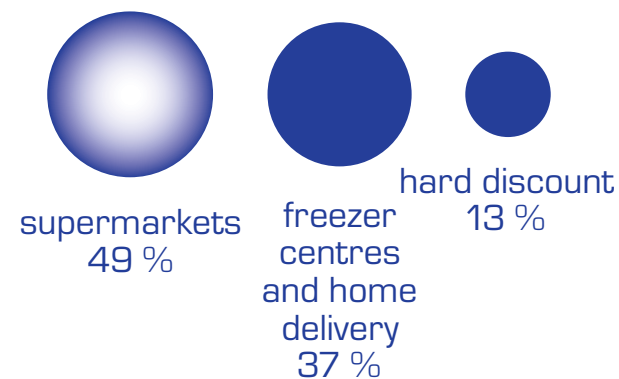
Chilled delicatessen



Canned products



Frozen products



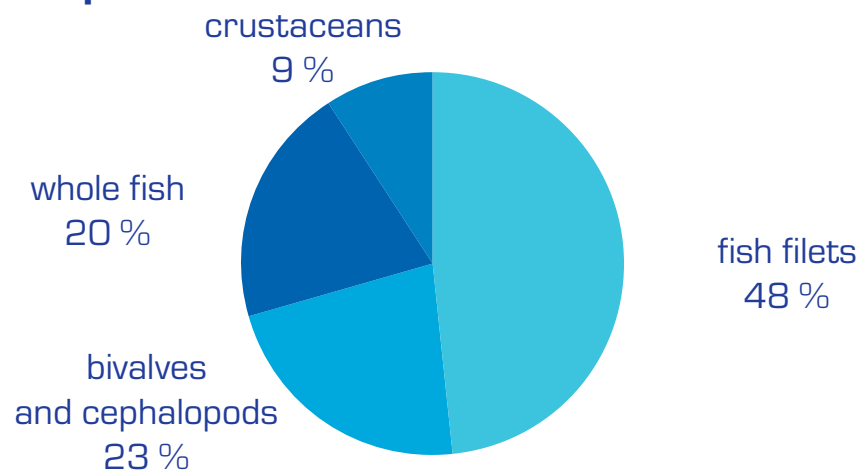
[1] excluding Hard Discount

Purchases of aquatic products by French households for home consumption in 2008

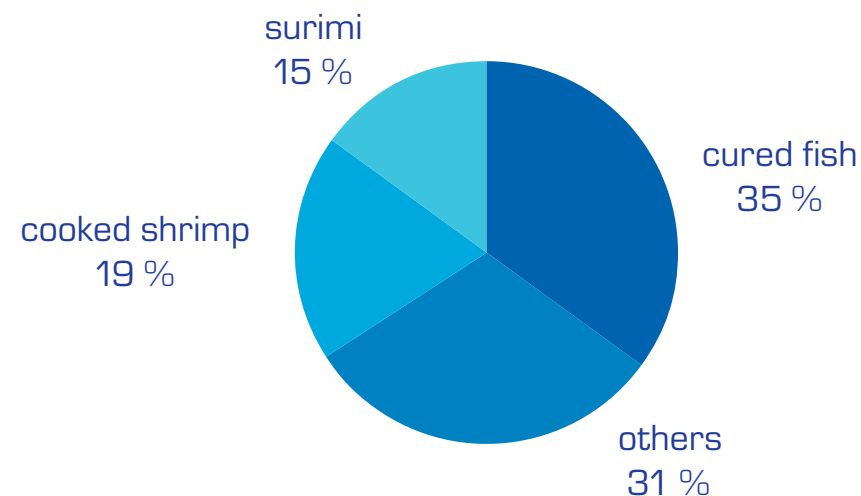
Breakdown of expenditure by presentation and species group

Source : FranceAgrimer / TNS

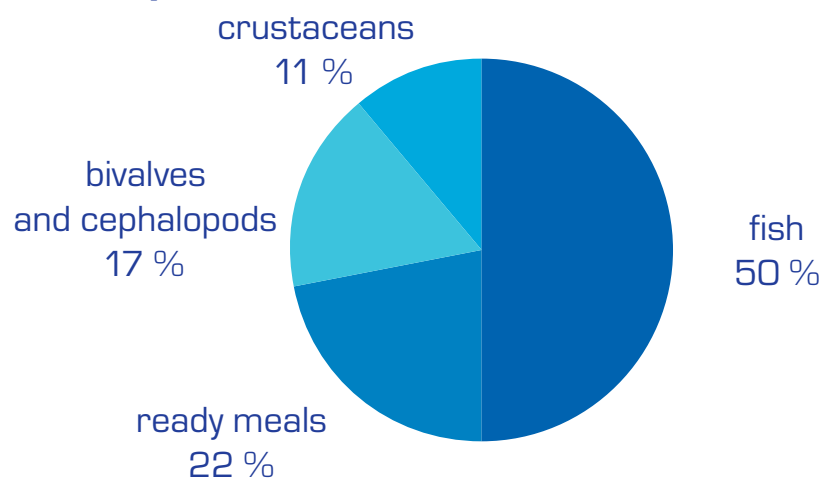
Fresh products



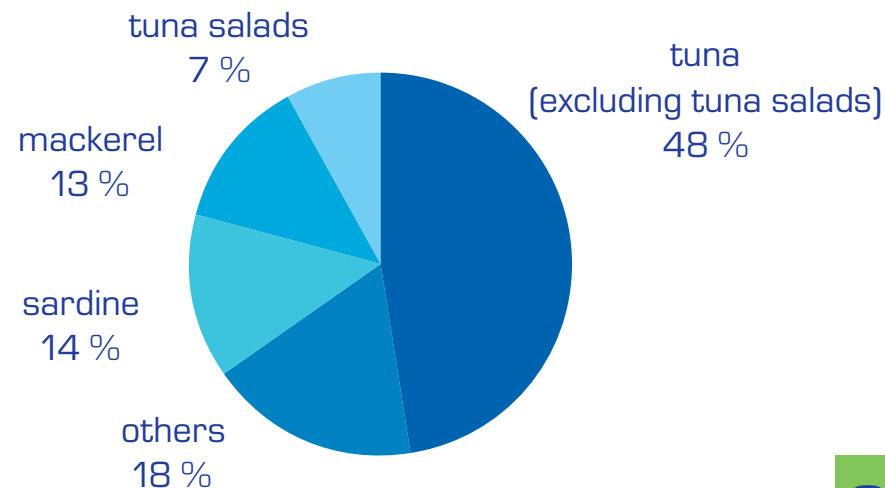
Chilled delicatessen



Frozen products



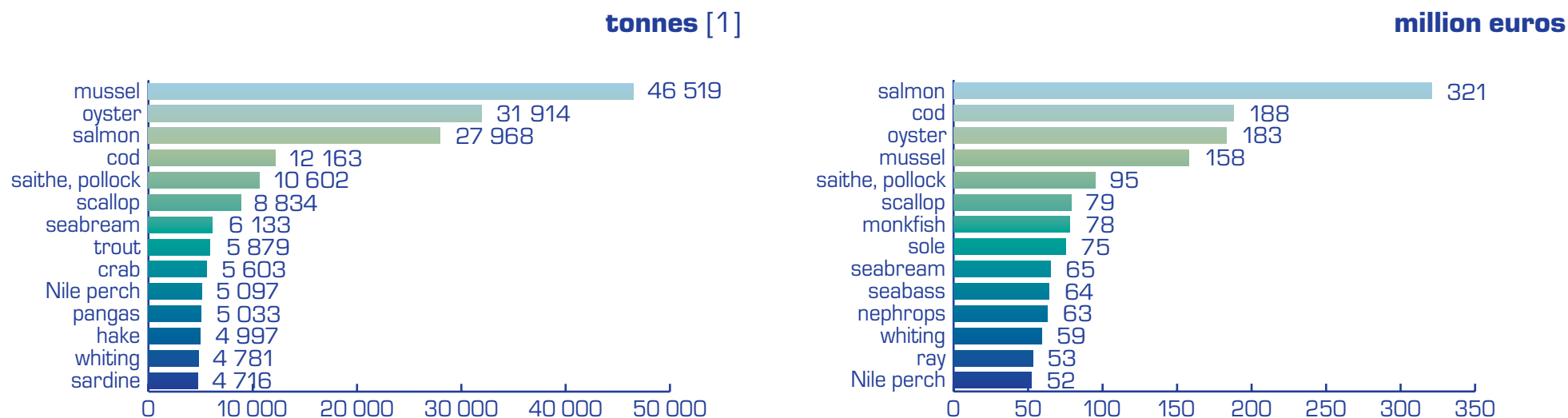
Canned products



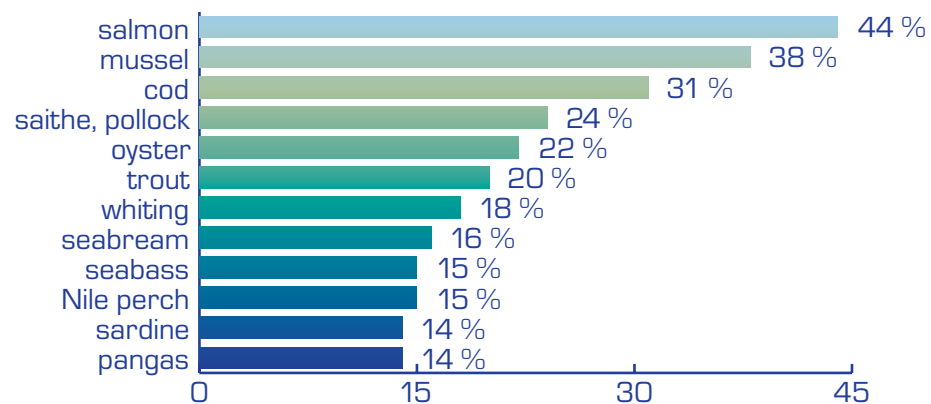
Purchases of aquatic products by French households for home consumption in 2008

Source : FranceAgriMer / TNS

Main species purchased at the fresh counter



percentage of purchasing households

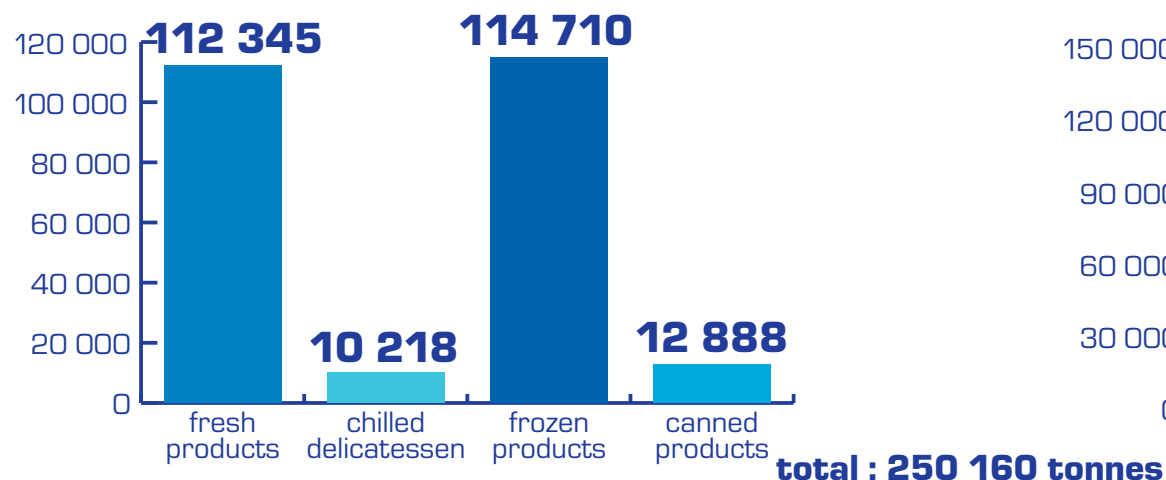


[1] net weight

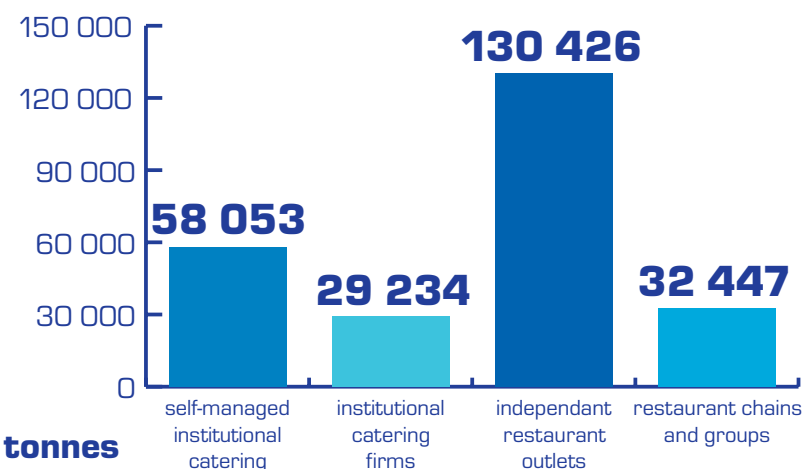
Purchases of aquatic products by the catering sector in 2008

Source : FranceAgriMer / GIRA Foodservice

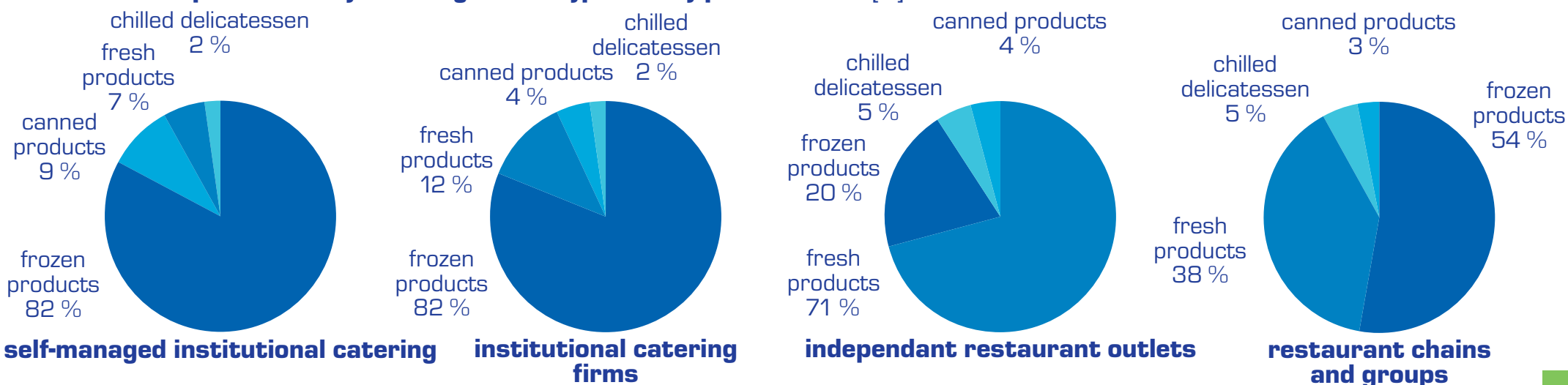
Quantities purchased by presentation (tonnes) [1]



Quantities purchased by presentation (tonnes) [1]



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

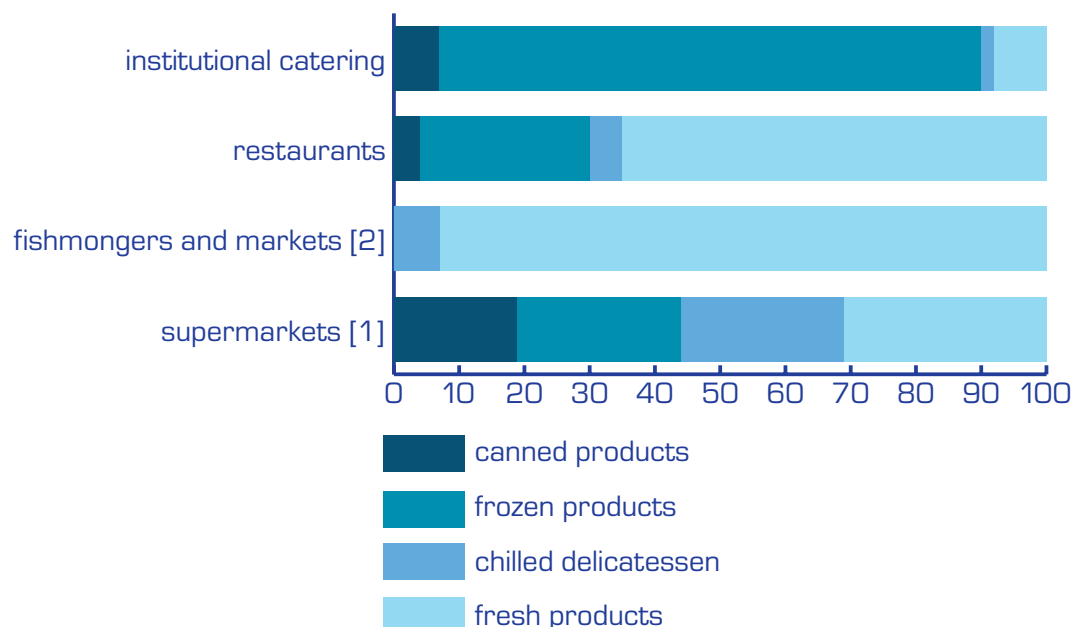


[1] net weight

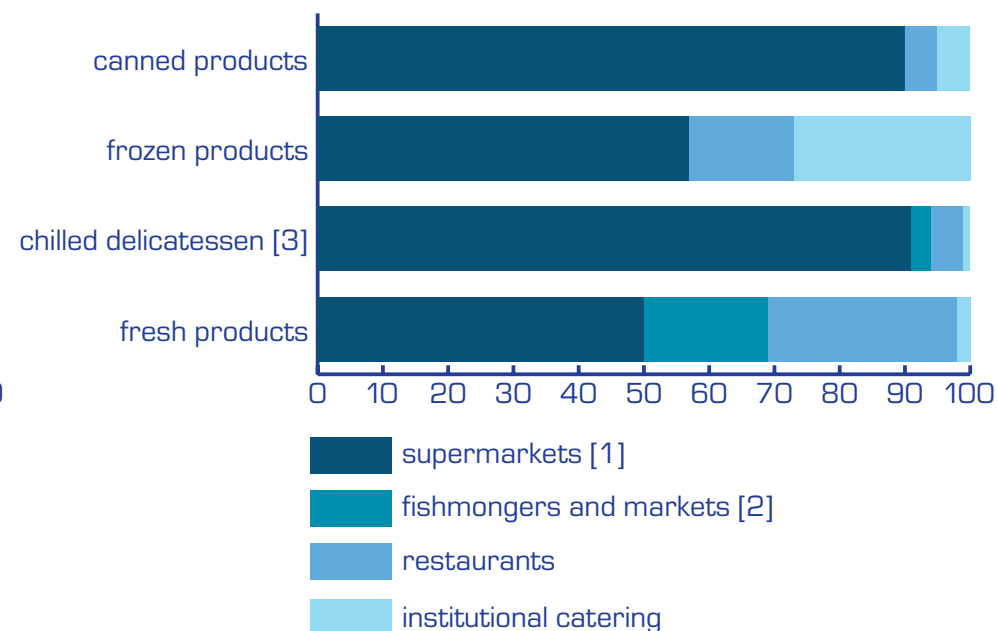
Breakdown of purchases by distribution channel in 2008

Source : FranceAgriMer / TNS and 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]	184 550	148 402	151 503	110 076
fishmongers and markets [2]	71 000	5 310	unsignificant	unsignificant
restaurants	105 125	8 657	42 604	6 487
institutional catering	7 220	1 561	69 114	6 401

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

[2] including direct sales

[3] net weight

Data collection methodology

Data : Included data are the last available at the date of publication

Foreign Trade : Raw Import/export data are provided by French Customs on a net weight basis. In this document data are converted into 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.

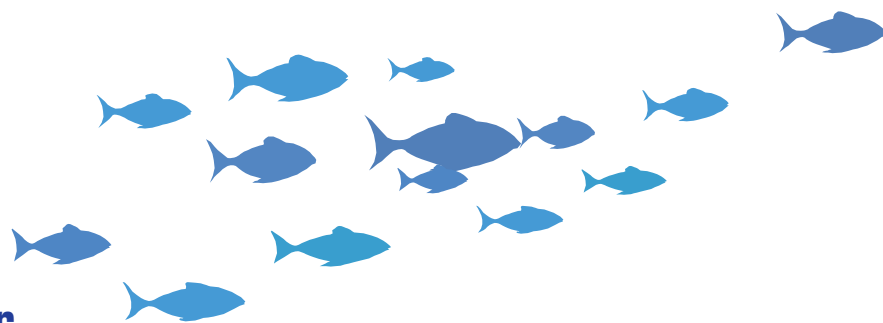
Coverage varies according to the product in question, and the overall rate of coverage is approximately 80%.

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

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