FRANCE IN THE WORLD AND IN THE EU

(2015, source: FAO and Eurostat)

France is the EU's 4th largest producer for fisheries and 3rd largest for aquaculture products.

(1000 tonnes)	World	EU-28	France	% World	% EU-28
Catches	104 635	5 144	497	0,5%	9,7%
Aquaculture	106 094	1 307	207	0,2%	15,8%
Total	211 511	6 451	704	0,3%	10,9%

FISHING FLEET

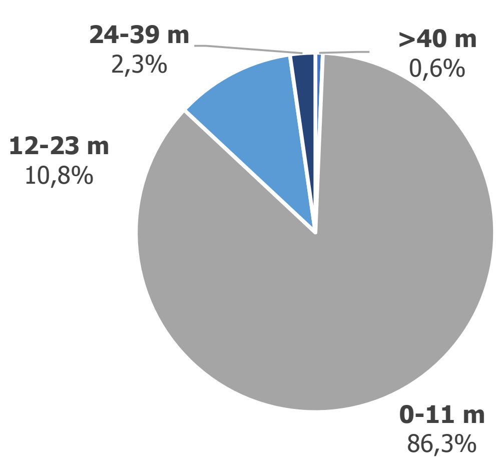
(**fleet** - 2017, source: EU fishing fleet register; **employment** - 2015, source: JRC)

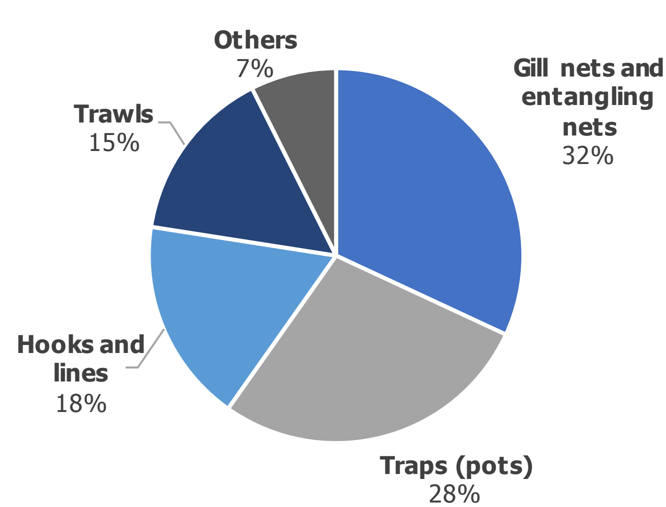
Vessels	Capacity	Power
Number: **6.513**	GT: **174.402**	KW: **969.890**

TOTAL FTE: **6.865**

0-11 m	12-23 m	24-39 m	>40 m
Jobs (FTE): **40%**	Jobs (FTE): **34%**	Jobs (FTE): **14%**	Jobs (FTE): **12%**

The French fishing fleet and gear composition:



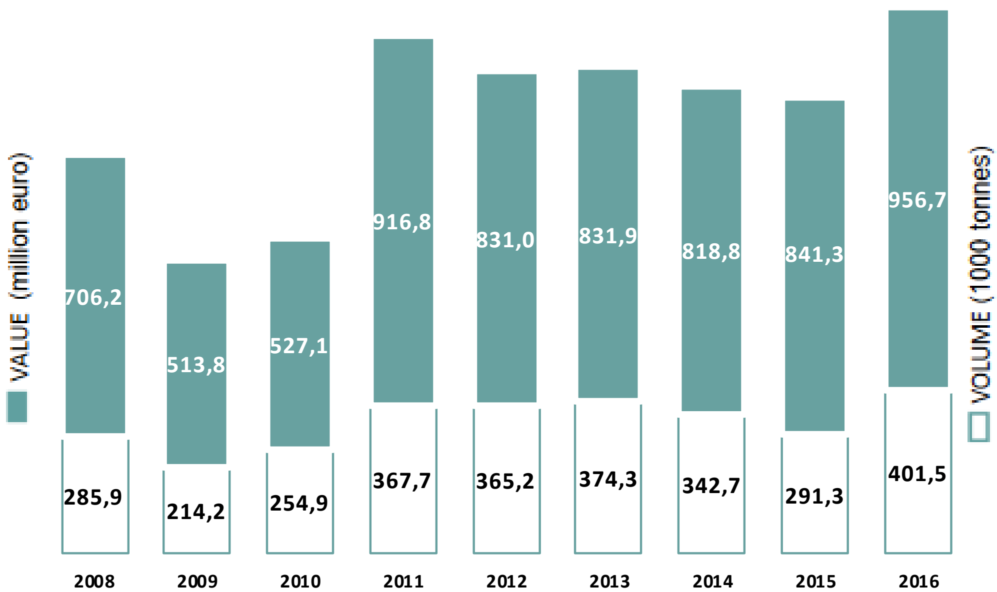


LANDINGS

Landings represent the initial unloading of any quantity of fisheries products, including aquatic plants, from on board a fishing vessel to land in a given country, regardless of the nationality of the vessel making the landings. Landings include also sales occurred in outermost regions. Landings are reported in net weight.

In France, the species are mainly landed fresh and for human consumption (99% respectively). 98% of fishery products are landed by French vessels.

There are 446 fishing ports recorded in France (source: EU Master Data Register).



Main commercial species landed and % of total (2016, million euro and 1.000 tonnes)

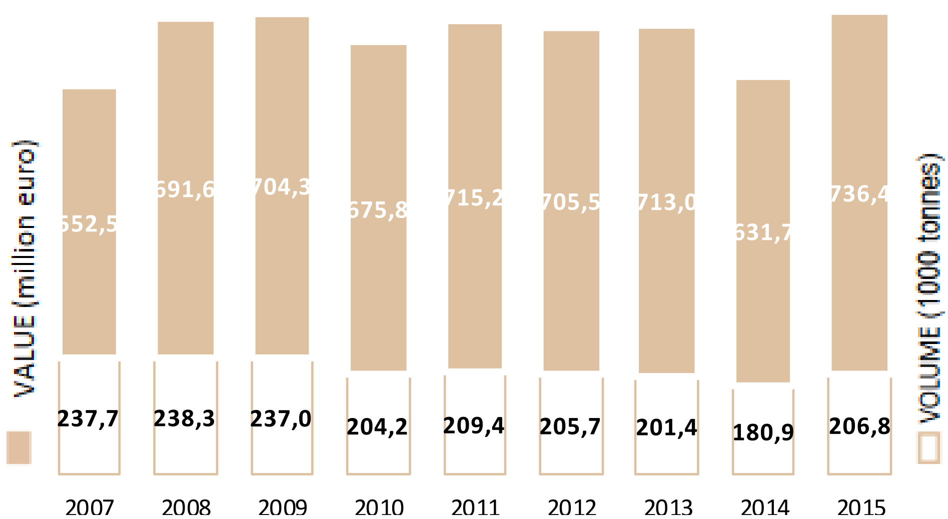
Species (value)	Value (million euro)	%	Volume (1.000 tonnes)	%	Species (volume)
YELLOWFIN TUNA	79	8%	59,5	15%	SEAWEED AND OTHER ALGAE
SOLE	77	8%	41,6	10%	YELLOWFIN TUNA
SCALLOP	77	8%	37,6	9%	SKIPJACK TUNA
MONK	73	8%	25,5	6%	SCALLOP
NORWAY LOBSTER	48	5%	23,9	6%	SARDINE
HAKE	40	4%	14,2	4%	MONK
OTHERS	562	59%	199,2	50%	OTHERS

(source: Eurostat)

AQUACULTURE

Aquaculture refers to the farming of aquatic (freshwater or saltwater) organisms, such as fish, molluscs, crustaceans and aquatic plants. Aquaculture data are reported in live weight equivalent and value. Farmed products are generally not sold in auction markets, but directly from producers to wholesalers or to retailers.
In France, 79% of fish is farmed in sea and brackish waters and 21% in freshwater.
The most important aquaculture production methods are (Eurostat):

- 63% off bottom, entirely farmed in sea and brackish water;
- 15% in tanks and raceways, entirely farmed in freshwater;
- 5% in ponds, almost entirely farmed in freshwater.



Main commercial species farmed and % of total
(2015, million euro and 1.000 tonnes)

Species	Value (million euro)	% of total
OYSTER	388	53%
MUSSEL MYTILUS SPP.	138	19%
TROUT	123	17%
OTHER FRESHWATER FISH	24	3%
EUROPEAN SEABASS	18	2%
OTHERS	46	6%

Volume (1.000 tonnes)	% of total	Species
77	37%	OYSTER
75	36%	MUSSEL MYTILUS SPP.
37	18%	TROUT
4	2%	CARP
4	2%	OTHER FRESHWATER FISH
10	5%	OTHERS

(source: Eurostat)

PRODUCER ORGANISATIONS

(2018, source: DG MARE, link)

16 producers organisations (POs) and **2 associations of POs** are formally recognised. Their role is to contribute to the achievement of the objectives of the CFP and of the CMO through the collective management of their members' activities.

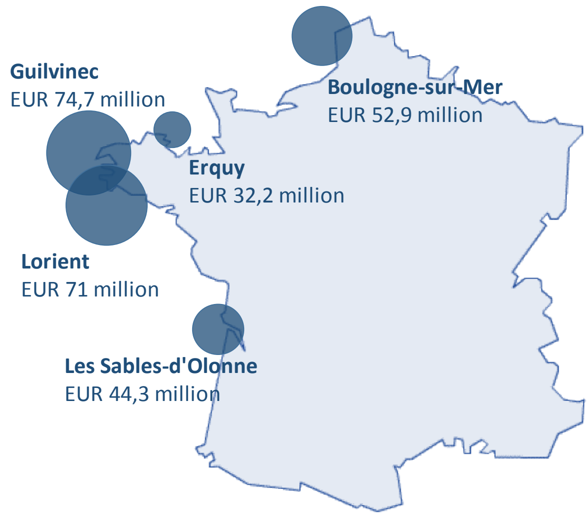
Out of the 16 POs, 15 are involved in fisheries and 1 in aquaculture. As for the associations of POs, they both operate in the fishery sector.

FIRST SALES (2016, source: EUMOFA)

First sales concern the fish that is sold or registered at an auction center or to registered buyers or to producer organizations (PO). First sales may differ from landings since the former do not cover fish that is landed by vessels owned by processing companies or direct sales to processors.

In France there are 37 auction markets and Le Guilvinec, Lorient, Boulogne-sur-Mer, Les Sables-d’Olonne and Erquy covered together 41% (in value).

In 2016, 50% of the volume and 70% of the value of landings have been sold in the auction markets of Metropolitan France. Auction markets are responsible for gathering and transmitting sales notes to FranceAgriMer, thanks to the RIC (Réseau Inter-Criées: Auction markets network).



37 auctions were operating in 2016:
- 1 in the North sea,
- 4 in the Mediterranean,
- 20 in the Bay of Biscay and Iberian coast,
- 12 in the Celtic sea.

In 2017, the main 3 auctions covered 32% in terms of volume and 30% in terms of value

Top-3 auctions	Volume (tonnes)	Value (million EUR)	Top-3 main commercial species (value)
Guilvinec	18.212	75	Monk, Norway lobster, megrim
Lorient	21.864	71	Monk, Norway lobster, ling
Boulogne-sur-Mer	20.900	53	Squid, saithe, sole

WHOLESALE (source: FFMIN, SEMMARIS)

Wholesale is an intermediary stage in the distribution channel that buys in bulk and sells to resellers (e.g. retailers) rather than to consumers.

In France 11 wholesale market places ("marchés d'intérêt national" or MIN) are involved in sales of fishery and aquaculture products. About 100 fish wholesaling companies operate on these markets, out of which 44 are situated in Paris-Rungis Wholesale Market.

In 2016 Rungis sold 97,441 tonnes of FAP for a value of EUR 852 million (source: https://www.rungisinternational.com) .

The "Réseau des nouvelles des marchés" (RNM) publishes daily, weekly and monthly price quotations on the wholesale market of Rungis (www.rnm.franceagrimer.fr).

11 wholesale markets
100 companies

PROCESSING (source: Eurostat-SBS)

In 2015, 12.073 persons were employed in France in the fish processing industry.

In France, the fish processing industry recorded a value added of EUR 625 million, covering 2% of the value added of total manufacture of food products.

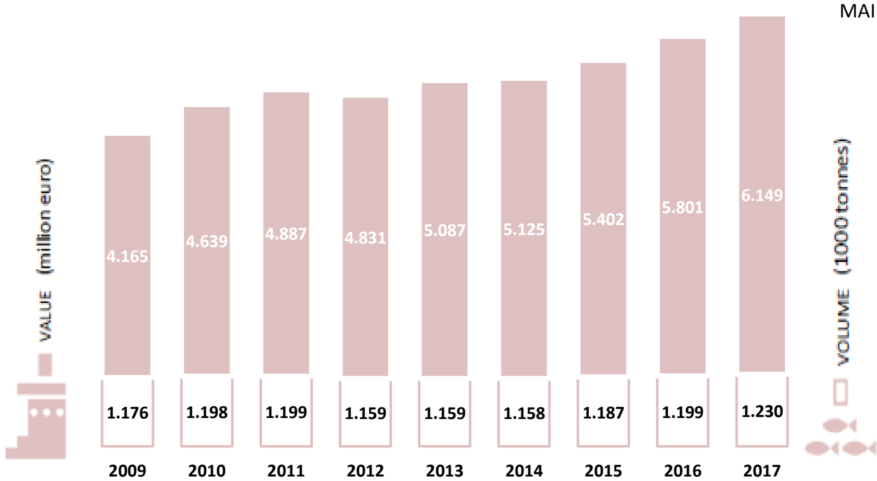
The main products in 2016 were, smoked salmon, prepared dishes and surimi, fresh fillets, prepared and preserved tuna and mackerel.

380 companies
Sales: EUR 3,7 billion
(2015, source Eurostat - SBS)

France updated on 16-04-18

TRADE (source: Eurostat)

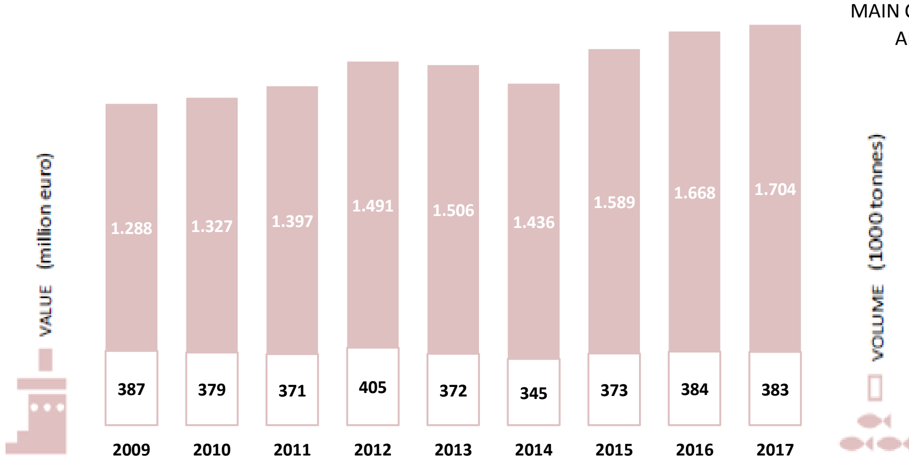
Import



MAIN COMMERCIAL SPECIES IMPORTED AND % OF TOTAL IMPORTS
(2017, million euro)

SALMON	1.290	21%
TROPICAL SHRIMPS	648	11%
COD	482	8%
OTHER MARINE FISH	293	5%
SCALLOP	241	4%
SKIPJACK TUNA	215	3%
OTHERS	2.980	48%

Export



MAIN COMMERCIAL SPECIES EXPORTED AND % OVER TOTAL EXPORTS
(2017, million euro)

SALMON	191	11%
OTHER PRODUCTS	163	10%
OTHER MARINE FISH	147	9%
YELLOWFIN TUNA	97	6%
OYSTER	90	5%
TROPICAL SHRIMPS	70	4%
OTHERS	947	55%

Main countries of **ORIGIN** (in value, 2017)

United Kingdom 13%
Sweden 10%
Netherlands 9%
Spain 8%

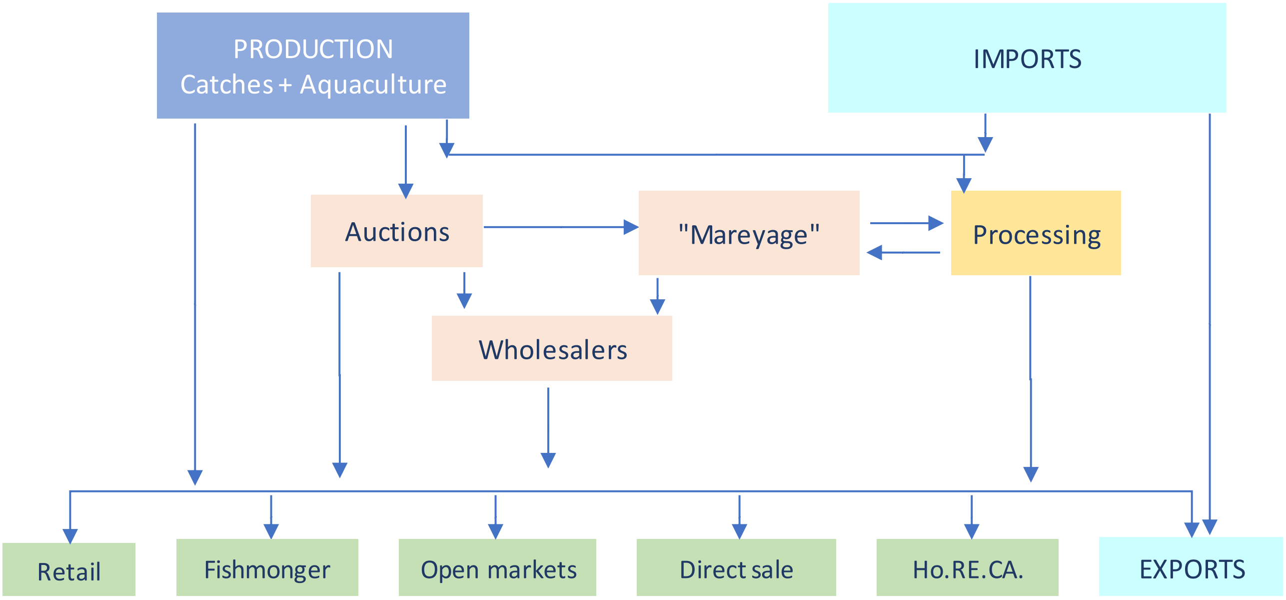
Main countries of **DESTINATION** (in value, 2017)

Italy 17%
Spain 17%
Belgium 12%
United Kingdom 9%

DISTRIBUTION

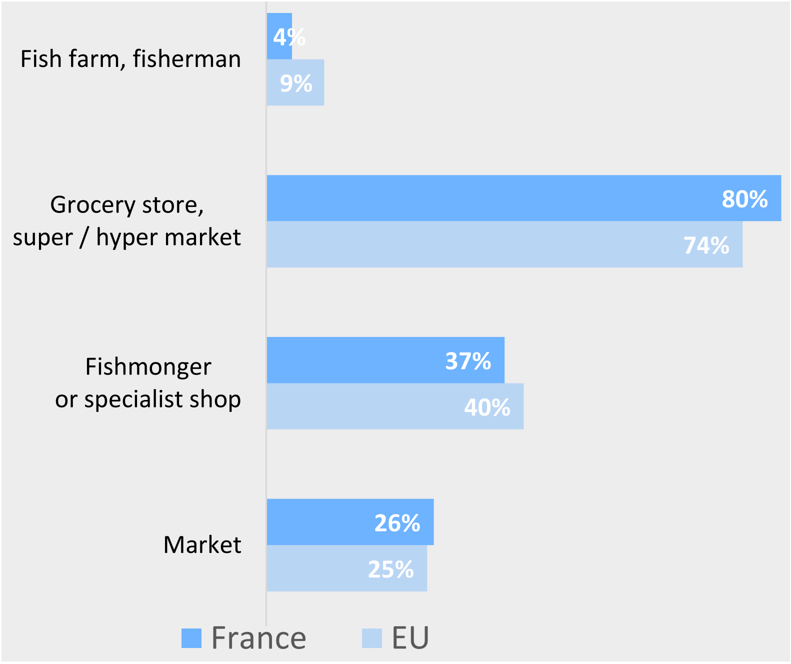
The supply chain of fisheries and aquaculture products in France

(source: FranceAgriMer)

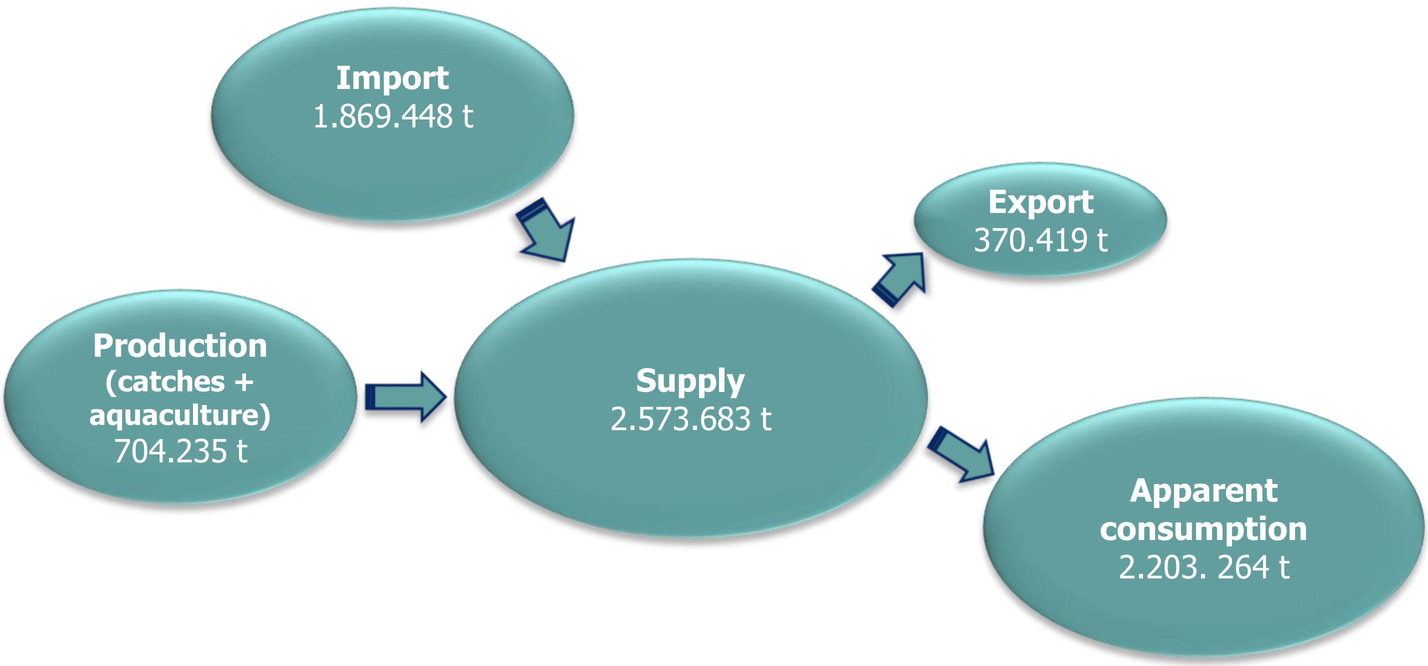


Consumer preferences on purchasing channels

(source: EUROBAROMETER)



SUPPLY BALANCE (2015, source: EUMOFA)



CONSUMPTION

Apparent consumption of fishery and aquaculture products in France amounted to 33,9 kg/per capita in 2015, slightly increasing (+1%) compared to the previous year. Main consumed species are shellfish and salmon.

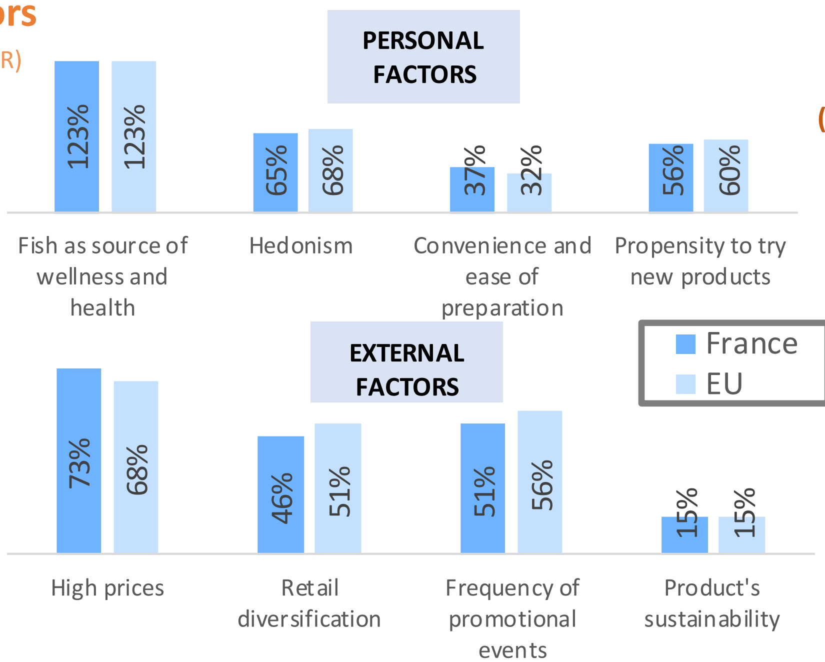
French consumers consume specifically fresh, frozen and tinned, while loose fish is more frequently consumed (71%) than the EU average (68%). From a socio-demographic point of view, regular fish consumers belong mainly to age classes 40-54 years and over 55 years. Young people also tend to eat fish frequently in France and the number of regular consumers in the age group 15-24 years is higher than the EU average (source: "EU consumer habits regarding fishery and aquaculture products").

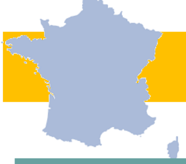
Purchasing factors

(source: EUROBAROMETER)

33,9 Kg per capita

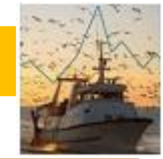
(source: EUMOFA)





FRANCE IN EUMOFA

updated on 16-04-18



LANDINGS

Volumes and values are collected by EUMOFA from **Eurostat – Fishery**. Data concern all species landed in France. Data are available on a yearly basis, accessible through simple and advanced tables.

FIRST SALES

Volumes and values are collected from **France AgriMer** on a weekly and monthly basis. Data include all sales occurred through auctions and do not include other sales occurred out of auctions (e.g. direct sales).

Weekly data are collected and disseminated for 14 species and 23 places of sale. Click here for the list of species and places of sale.

Monthly data are collected and disseminated for all species sold in all auctions included in the data transmission (click here for the list).

Both types of data are accessible through simple and advanced tables.

TRADE

Volumes and values are collected from **Eurostat – COMEXT.** Data concern trade of all fisheries and aquaculture products as recorded by national customs, available on a monthly and yearly basis.

Data are accessible through simple and advanced tables.

AQUACULTURE

Volumes and values are collected by EUMOFA from **Eurostat – Fishery**. Data are available on a yearly basis, accessible through simple and advanced tables.

WHOLESALE

Prices are collected from **France AgriMer** on a weekly basis. Data include all sales occurred in the Rungis market and cover a selection of 15 species.

Data are accessible through simple and advanced tables.

PROCESSING

Volumes and values are collected from **Eurostat – PRODCOM.** Data concern 24 processed products as recorded through the PRODCOM nomenclature.

Data are available on a yearly basis and are accessible through simple tables.

CONSUMPTION

Household consumption of fresh fishery and aquaculture products is collected from a **private provider** by EUMOFA on a monthly basis for 10 products based on panel reporting. Click here for the products per each Member State.

Data (volumes and values) are accessible through simple queries on a monthly and yearly basis.