



## 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.

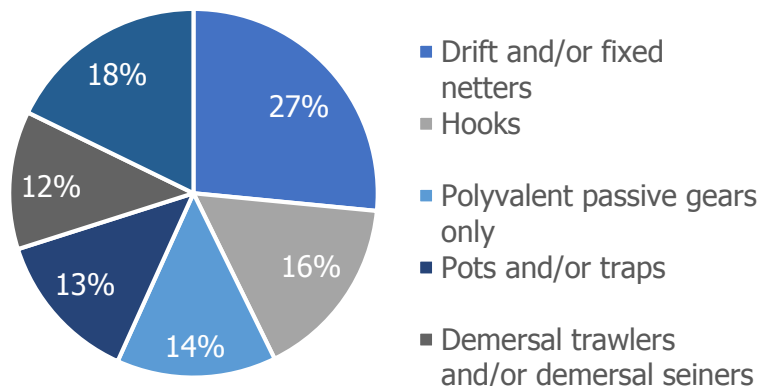
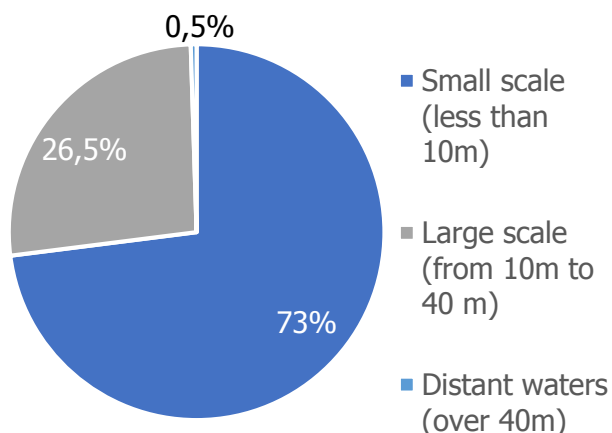
(1000 tonnes)	World	EU-28	France	% World	% EU-28
Catches	104 635	5 144	497	0,5%	9,7%
Aquaculture	106 094	1 307	207	0,2%	15,8%
Total	211 511	6 451	704	0,3%	10,9%

## FISHING FLEET

(2015, source: [JRC and Annual Economic Report](#))

Vessels	Capacity	Power
Number: <b>6.911</b> (including 1.186 inactive)	GT: <b>171,9</b>	KW: <b>999,4</b>
<b>TOTAL FTE: 6.865</b>		
Small scale	Large scale	Distant fleet
Jobs (FTE): <b>52%</b>	Jobs (FTE): <b>44%</b>	Jobs (FTE): <b>4%</b>

The French **fishing fleet\*** and **gear composition**:



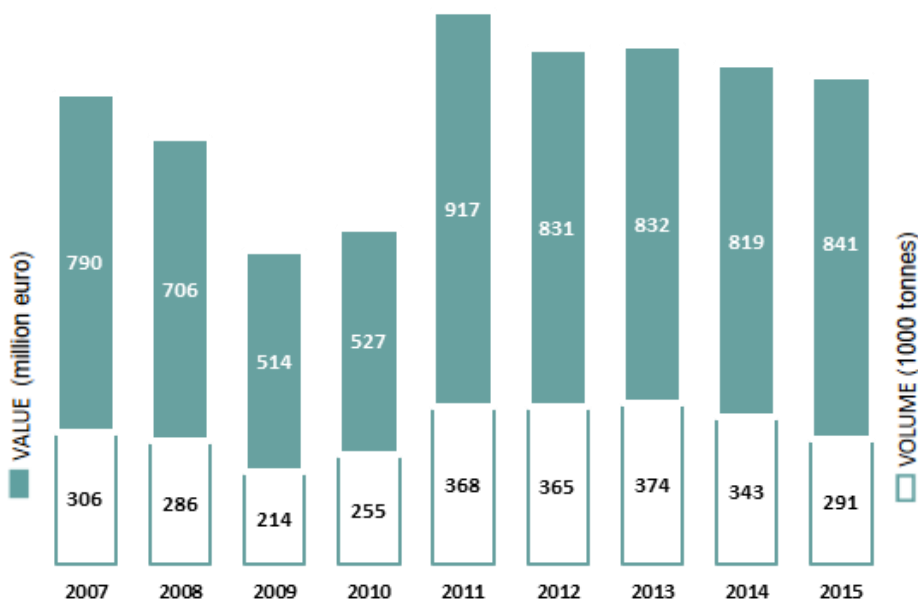


## LANDINGS

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 37 main ports, with auction halls (covered by EUMOFA).



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



SOLE	81	10%	25	8%	SCALLOP
MONK	73	9%	20	7%	SARDINE
SCALLOP	71	8%	19	7%	SEAWEED AND OTHER ALGAE
HAKE	47	6%	17	6%	HAKE
EUR. SEABASS	45	5%	14	5%	MONK
NORWAY LOBSTER	42	5%	11	4%	WHITING
OTHERS	481	57%	185	63%	OTHERS

(source: Eurostat)

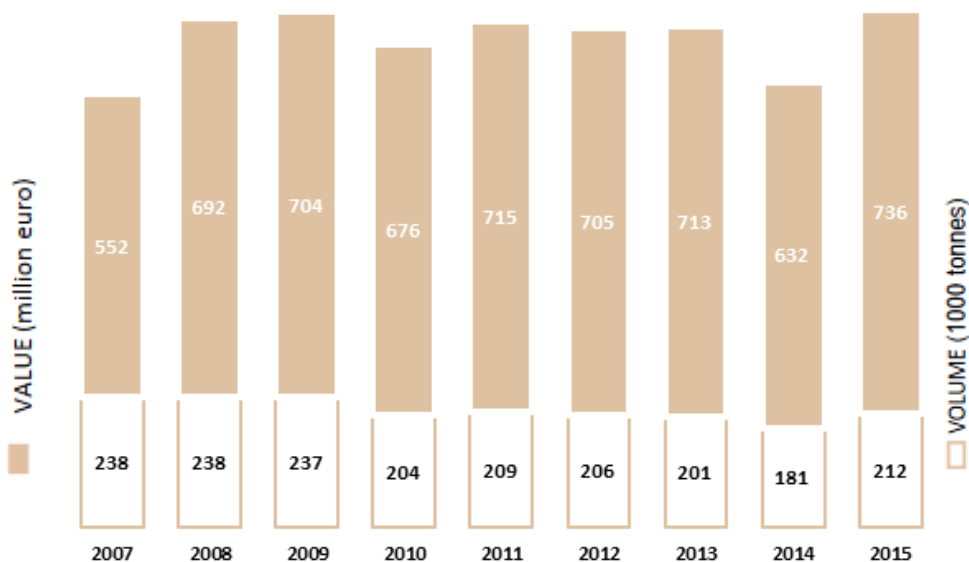


## AQUACULTURE

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, 78% of fish is farmed in sea and brackish waters and 21% in freshwater.

The most important aquaculture production methods are (Eurostat):

- 53% off bottom, entirely farmed in sea and brackish water;
- 17% in tanks, entirely farmed in freshwater;
- 5% in ponds, entirely farmed in freshwater.



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



OYSTER	387	53%
MUSSEL	138	19%
MYTILUS SPP.	123	17%
TROUT	87	12%

77	37%	OYSTER
75	36%	MUSSEL
37	18%	MYTILUS SPP.
17	5%	TROUT
		OTHERS

(source: Eurostat)



## PRODUCER ORGANISATIONS

(2016, source: DG MARE, [link](#))

**19 producers organisations (POs)** and **2 associations of POs** are recognised for the management of fishery activities of their associated members.

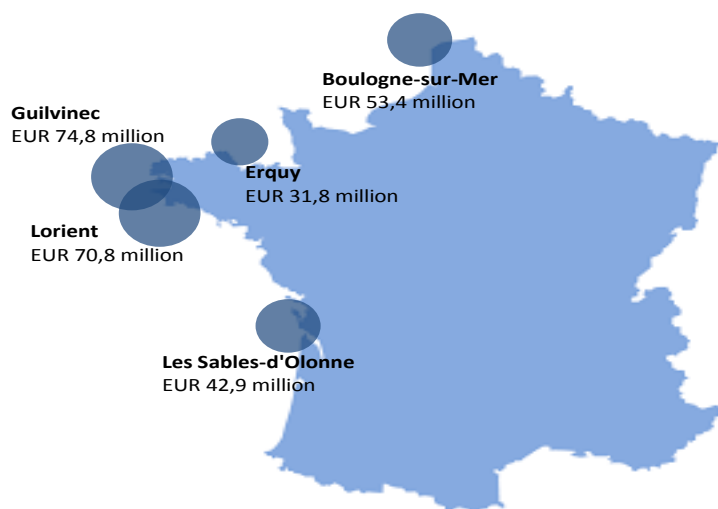
Out of the 19 POs, 14 are involved in fisheries and 5 in aquaculture (4 in shellfish farming, 1 in fish farming).

## FIRST SALES (2016, source: EUMOFA)

**First sale** concerns 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 2015, 70% of the volume and 85% 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 2016, 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)
Le Guilvinec	18.602	75	Monk, Norway lobster, megrim
Lorient	21.060	71	Monk, Norway lobster, hake
Boulogne-sur-Mer	22.353	54	Squid, saithe, common 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.

The “Réseau des nouvelles des marchés” (RNM) publishes daily, weekly and monthly price quotations on the wholesale market of Rungis ([www.rnm.franceagrimer.fr](http://www.rnm.franceagrimer.fr)).

**11 wholesale markets**  
**100 companies**



## PROCESSING (source: Eurostat-SBS)

In 2015, 12.122 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.

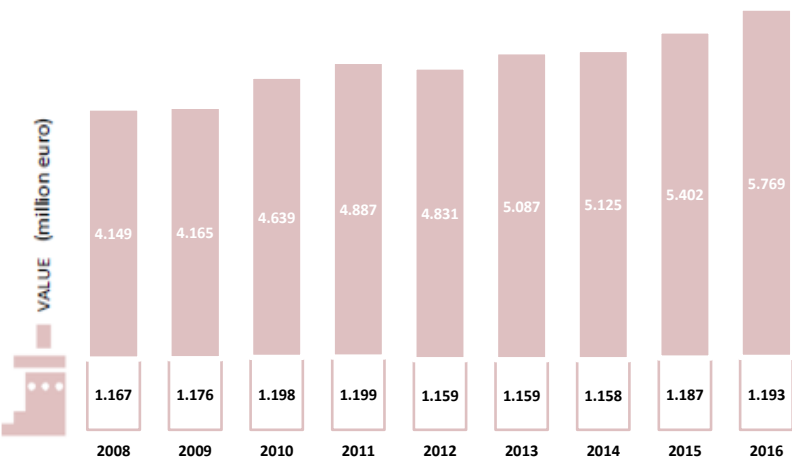
The main products were fresh fillets, smoked salmonids, cooked shrimps, canned fish, prepared dishes and surimi. refrigerated fish.

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



# TRADE (source: Eurostat)

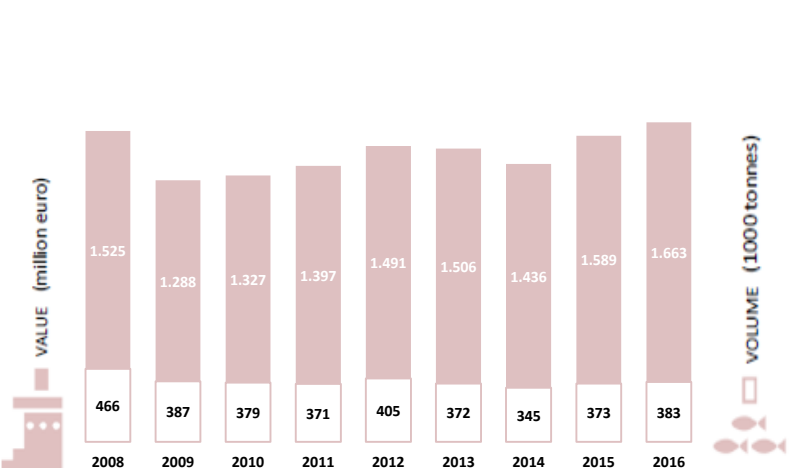
## Import



MAIN COMMERCIAL SPECIES IMPORTED AND % OF TOTAL IMPORTS (2016, million euro)

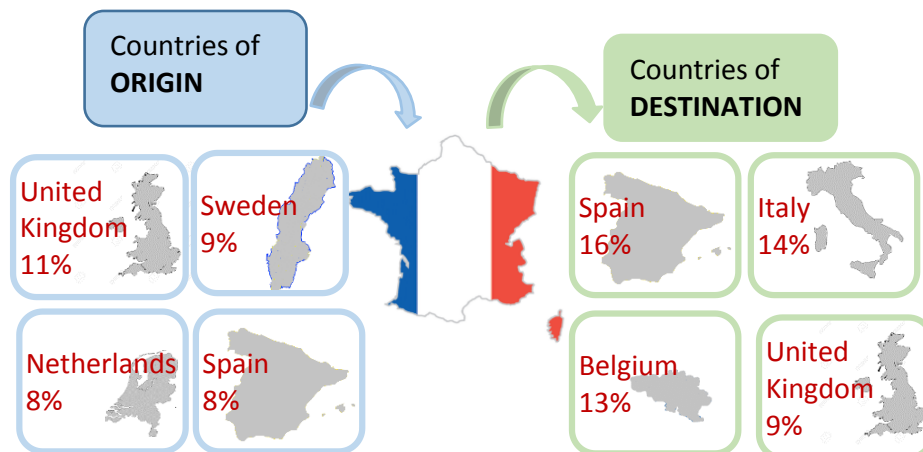
Species	Value (million euro)	% of Total Imports
SALMON	1.221	21%
TROPICAL SHRIMP	603	10%
COD	459	8%
OTHER MARINE FISH	298	5%
SCALLOP	230	4%
YELLOWFIN TUNA	190	3%
<b>Total</b>	<b>2.769</b>	<b>48%</b>

## Export



MAIN COMMERCIAL SPECIES EXPORTED AND % OVER TOTAL EXPORTS (2016, million euro)

Species	Value (million euro)	% of Total Exports
SALMON	193	12%
OTHER MARINE FISH	167	10%
OTHER PRODUCTS	143	9%
YELLOWFIN TUNA	98	6%
OYSTER	74	4%
TOOTHFISH	57	3%
OTHERS	875	53%

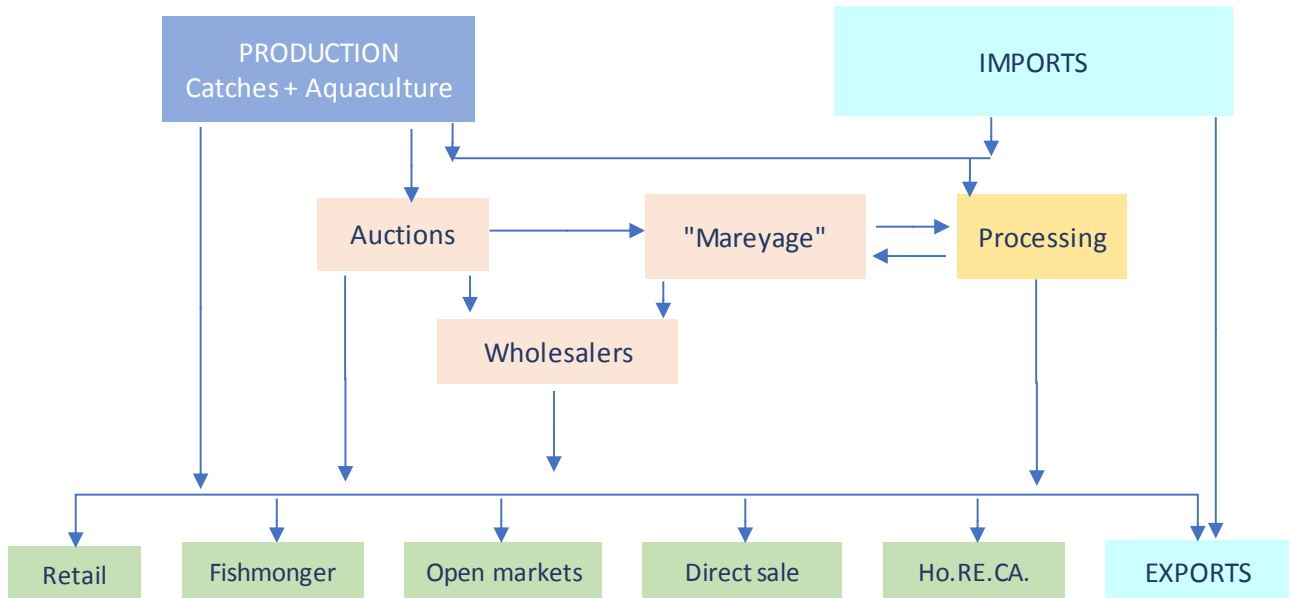




## DISTRIBUTION

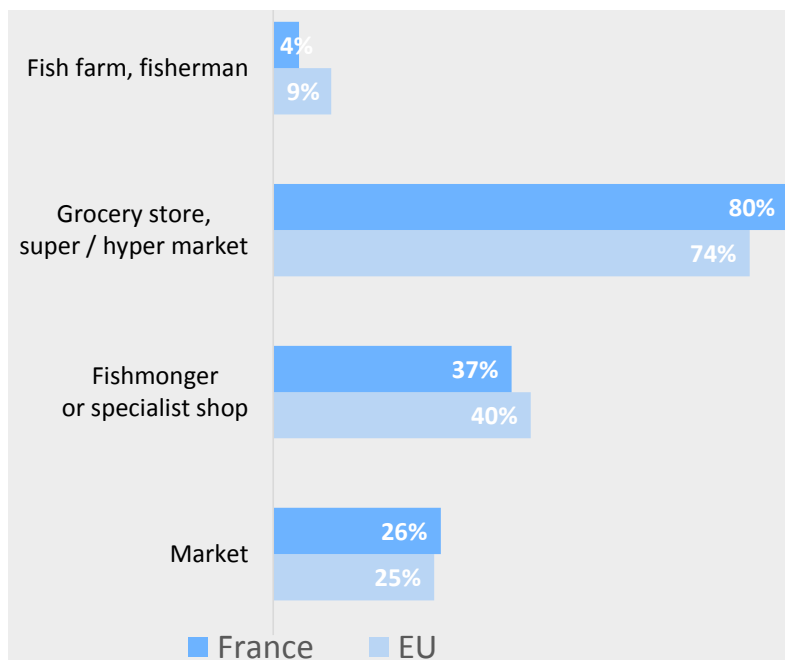
### The supply chain of fishery and aquaculture products in France

(source: FranceAgriMer)



### Consumers preferences on purchasing channels

(source: EUROBAROMETER)

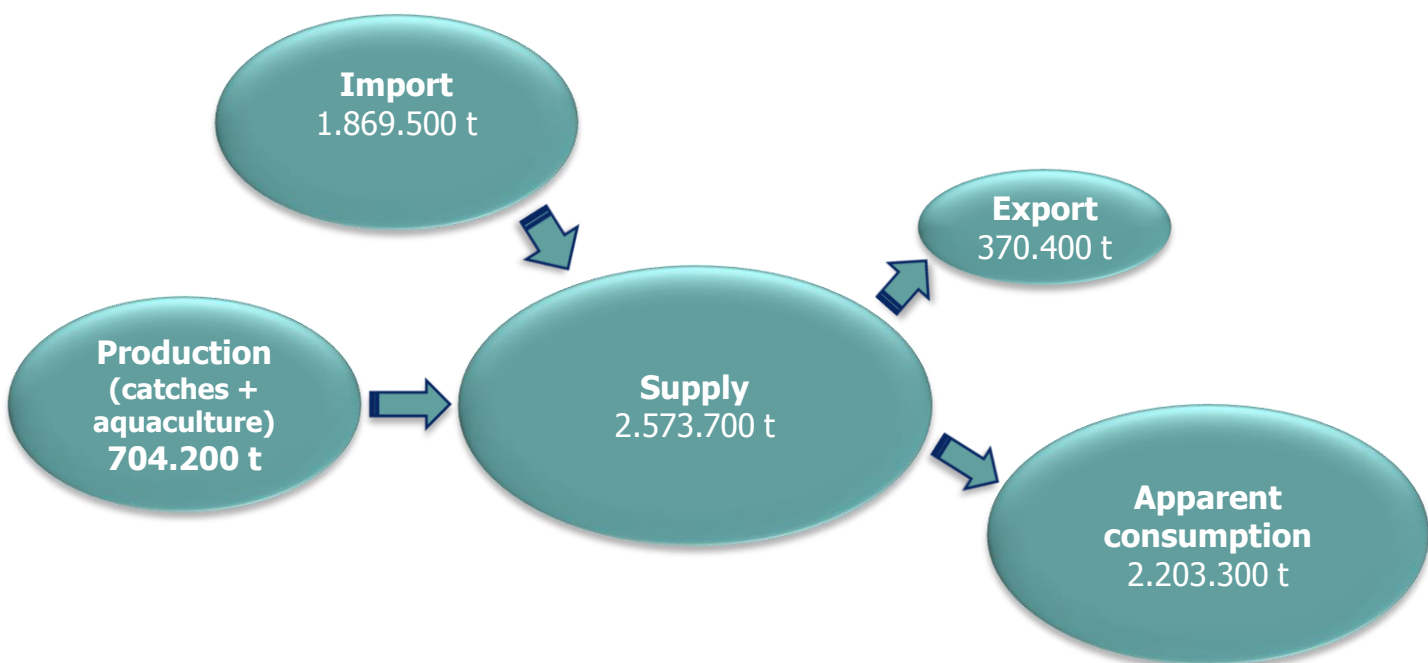




*France*



## SUPPLY BALANCE (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**.

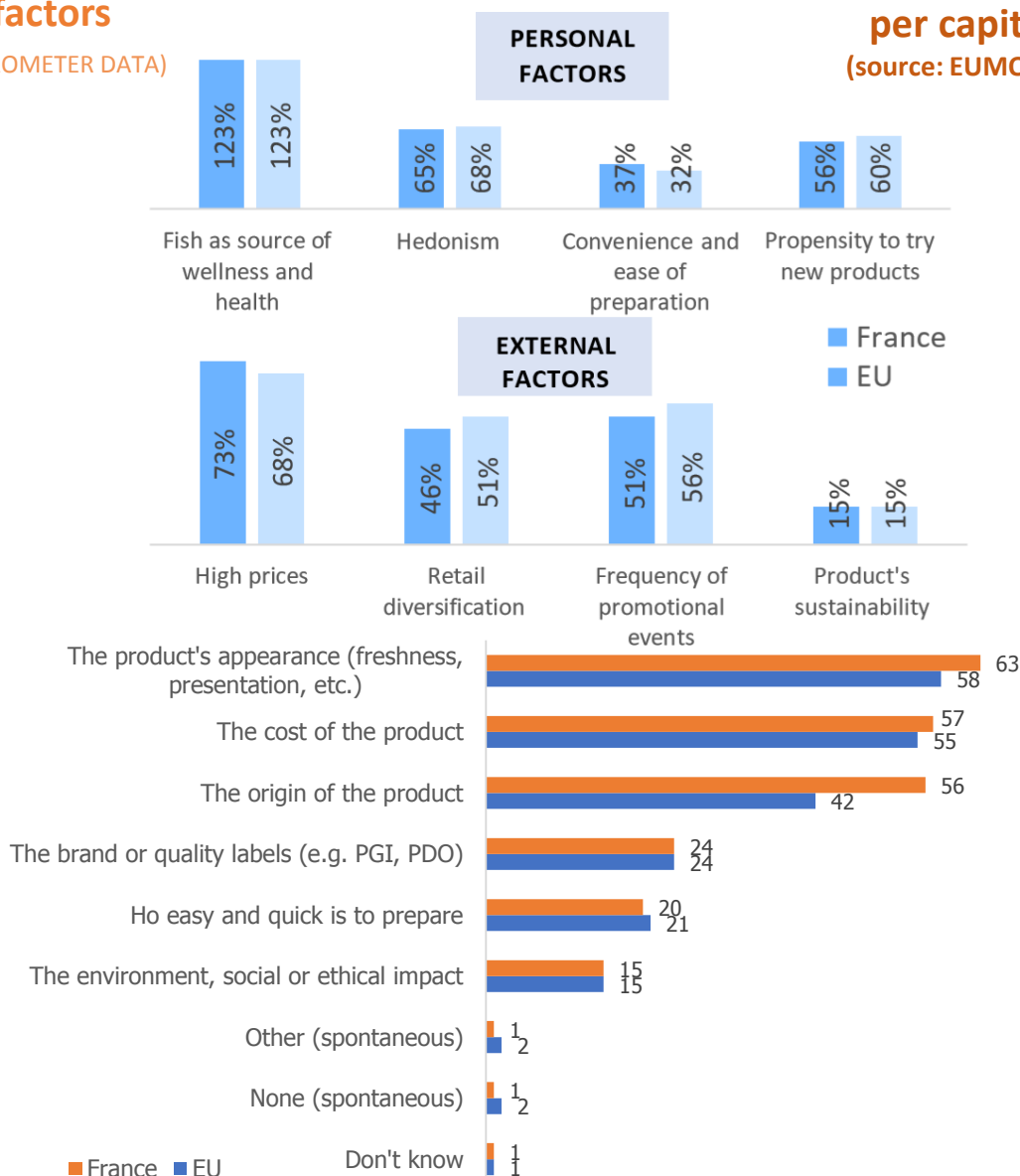
From a socio-demographic point of view, regular fish consumers belong mainly to age classes 40-54 years and over 55 years. Young people also tend to eat fish frequently in France and the number of regular consumers in the age group 15-24 years is higher than the EU average (source: "EU consumer habits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

French consumers consume specifically fresh, frozen and tinned, while loose fish is more frequently consumed (71%) than the EU average (68%).

## Purchasing factors

(source: EUROBAROMETER DATA)

**33,9 Kg per capita**  
(source: EUMOFA)





# FRANCE IN EUMOFA



## 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 (37 auctions). Click [here](#) for the list of auctions.

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 22 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.