

SOVEREIGNPIALPHA FRANCE LTD



# FRENCH FISHERIES AND SUSTAINABILITY

Prepared by

BobÉ ENGUELEGUELE Stéphane

September 2024



2024 SOVEREIGNPIALPHA FRANCE Ltd. RCS Paris 948431838 36, rue Scheffer 75016 Paris France

Téléphone: +33 751 053 066 email: [sb@sovereignpialpha.com](mailto:sb@sovereignpialpha.com)

**GLOBAL QHSE © is a brand operated by Sovereignpialpha France Ltd. All Rights Reserved**

The content presented here is the result of research conducted by Sovereignpialpha France Ltd with input from external sources. The opinions and conclusions expressed in this work do not necessarily represent the views of Sovereignpialpha France Ltd. We cannot guarantee the data's accuracy, completeness, or timeliness. Sovereignpialpha France Ltd assumes no responsibility for any errors, omissions, or inconsistencies in the information, nor for any liabilities arising from the use or non-use of the information, the methods used, processes, or conclusions stated. Additionally, some sections of this work have been edited using AI technology.

Attribution: Thank you for citing this work as follows: Bobé Enguelegue. S. (2024). France Fisheries and Sustainability. Paris: Sovereignpialpha France Ltd Report.

All questions relating to rights and licences should be directed to SOVEREIGNPIALPHA FRANCE Ltd.



## TABLE OF CONTENTS

<b>TABLE OF CONTENTS</b>	<b>4</b>
<b>EXECUTIVE SUMMARY</b>	<b>6</b>
<b>INTRODUCTION</b>	<b>10</b>
<b>Marine Environment Changes</b>	<b>17</b>
<b>Anomalies Analysis</b>	<b>17</b>
<b>Trend Analysis</b>	<b>18</b>
<b>Impact of Climate Change on World's Seas</b>	<b>21</b>
<b>Challenges to French Fisheries</b>	<b>22</b>
<b>Regulations Changes and Economics Constraints</b>	<b>22</b>
<b>Climate Change</b>	<b>23</b>
<b>PRODUCTIVITY OF FRENCH FISHERIES</b>	<b>26</b>
<b>Trends Analysis</b>	<b>26</b>
<b>Correlation Analysis</b>	<b>28</b>
<b>SECTOR ECONOMIC ROBUSTNESS</b>	<b>30</b>
<b>Financial Performances of the Fisheries</b>	<b>30</b>
<b>Trend and Pattern Analysis</b>	<b>32</b>
<b>Value Added and Profitability Analysis</b>	<b>35</b>
<b>Employment</b>	<b>36</b>
<b>Companies Failures</b>	<b>40</b>
<b>French Fleet</b>	<b>42</b>
<b>ANALYSIS OF CAPTURES</b>	<b>44</b>
<b>Volumes of Captures</b>	<b>44</b>
<b>Seasonal Analysis of Capture Volumes (2022)</b>	<b>46</b>
<b>Fishing, Productivity and Sustainability: Fisheries and GDP</b>	<b>48</b>
<b>Protection of Access Rights for Small-Scale Fisheries</b>	<b>52</b>
<b>Global and French Fisheries Sustainability Indicators</b>	<b>54</b>
<b>R&amp;D Commitment to the Fishing Industry</b>	<b>57</b>
<b>CONCLUSION</b>	<b>60</b>
<b>BIBLIOGRAPHY</b>	<b>64</b>



## EXECUTIVE SUMMARY

This report aims to evaluate the performance of the French fishing industry in light of the United Nations Sustainable Development Goals (SDGs). Drawing upon diverse data sources, including INSEE, Agreste, the Ministry of Ecological Transition, and the OECD, the report provides a detailed analysis of France's economic and sectoral performance alongside international benchmarks. The data span several years and offer comprehensive insights into various aspects of the fishing industry, including economic output, employment, climate impacts, and sustainability indicators.

The economic analysis reveals the fluctuating financial health of the French fishing sector from 2008 to 2021. Despite an average annual revenue of €1,234.82 million, the industry exhibits significant volatility, as evidenced by a standard deviation of €101.70 million. The financial value of fish landings grew from €1,168.1 million in 2013 to €1,389.1 million in 2016 before experiencing a slight decline. This growth aligns with solid market demand and improved operational efficiency. Additionally, there was a notable reduction in direct subsidies, indicating a reduced reliance on government support and suggesting increased resilience within the sector.

Regionally, Brittany and Normandy have shown consistent profitability growth, underscoring their strategic importance to the industry. In contrast, areas such as Provence-Alpes-Côte d'Azur, while improving, exhibit slower growth, highlighting a need for targeted initiatives to enhance their economic contributions. Investing in high-performing regions and addressing the specific challenges of lower-performing areas will be critical to ensuring balanced regional development.

The analysis of employment data from 2010 to 2021 demonstrates substantial variability, with employment figures ranging from a minimum of 1 to a maximum of 15,052, reflecting the wide distribution of employment values within the sector. A high standard deviation suggests that employment opportunities are unevenly distributed, with some regions showing significant employment while others do not.

Further analysis into fleet sizes shows a consistent decline in the total number of ships across all categories in France, particularly among smaller

ships, while larger vessels show relative stability. This trend reflects ongoing changes in fleet composition, potentially driven by economic, regulatory, or technological factors.

The report also explores the impact of climate change on marine environments, particularly in the Mediterranean and Black Seas, where significant warming and ecological shifts are expected. These changes will likely affect primary production, species distribution, and overall ecosystem health, posing challenges to the fishing industry.

The report assesses various SDG indicators relevant to fisheries from a sustainability perspective. The analysis of SDG indicator 14.b.1 shows positive progress in protecting access rights for small-scale fisheries, with scores increasing from 4.00 in 2018 and 2020 to 5.00 in 2022. This improvement represents a crucial step towards sustainable fisheries management, supporting biodiversity and local economies by ensuring that small-scale fisheries can operate effectively and sustainably.

Regarding research and development (R&D), France's funding for fisheries research is relatively modest and fluctuates significantly compared to Norway, which maintains a consistent and substantial level of investment. France's R&D spending in fisheries has varied from as low as 0.33% in 2009 to peaks of 4.97% in 2011, suggesting changes in investment priorities or reporting practices over time. The data on government financial transfers to the fisheries sector in France from 2004 to 2012 also reflects high volatility, with substantial year-to-year changes and no statistically significant long-term trend. The findings suggest an unstable policy environment, which could impact the long-term sustainability and development of the fisheries sector in France. The report provides a comprehensive overview of the French fishing industry, highlighting its economic contributions, regional dynamics, employment trends, and sustainability challenges. The findings underscore the need for continued investment in sustainable practices, enhanced regional support, and a stable policy framework to secure the sector's long-term viability. Strengthening research and development efforts and combating illegal, unreported, and unregulated (IUU) fishing will be crucial for furthering sustainable development, economic stability, and environmental conservation in French fisheries.



