

COUNTRY FACT-SHEET :

**FRANCE** 



**A- General overview**

**i. Morphological structure of the Atlantic coastline (data)**

1.1. Length of coastline in km	6 020 km (4 580 km + 1 440 km for overseas departments)
1.2. Total area of the coastal zone in km <sup>2</sup> (within a range of 10 km from the coast).	Not found.
1.3. No. of inhabited islands (if any).	19 (not included the 3 former islands of Noirmoutier, Ré and Oléron now linked to the continent by bridges) : 13 in continental France and 6 in French overseas departments.

**ii. Population and related social conditions for the Atlantic maritime areas (data)**

2.1. Total country population (Eurostat).	65 857 000 (Eurostat), <b>64 933 051 (INSEE)</b>
2.2. No. inhabitants living in the Atlantic coastal area. Source : Coastal regions : (INSEE) ; Coastal cities of coastal regions (Observatoire National de la Mer et du Littoral)	Coastal regions : 16 245 510 (15 165 714 + 1 079 796 in overseas departments) Coastal cities of coastal regions : 3 458 985 (2 567 609 + 891 376 in overseas departments)
2.3. Total employment of population aged 20-64 living in Atlantic area (last three years – Eurostat).	6 282 700 (2010); 6 270 700 (2011); 6 320 300 (2012)
2.4. Female employment rate, persons aged 20-64	59,93 (65,18 in continental France and 49,43 in overseas departments)
2.5. Older persons employment rate, persons aged 55-64	40,25 (38,2 in continental France and 44,3 in overseas departments)
2.6. Total unemployment of population aged 20-64 living in Atlantic area (last three years – Eurostat).	610 800 (2010) ; 630 300 (2011); 675 000(2011)
2.7. Youth unemployment rate, persons aged 15-24	31,87 (21,75 in continental France and 52,13 in overseas departments)



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**iii. Economic role of Atlantic maritime areas over the national total (data)**

3.1. Gross Domestic Product (GDP) per capita in the Atlantic coastal areas (in euros) (if available from the last three years).	23 835 (26 295 in continental France and 18 915 in overseas departments)
3.2. Gross Domestic Product (GDP) per capita in the country (in euros) (if available from the last three years).	31 076
3.3. Gross Value added (GVA) (in euros) in the last three years (if available) in the Atlantic coastal areas.	Coastal regions : 382 487 Millions € (INSEE, 2012 base 2005) of which 364 235 in continental France and 18 252 in overseas departments.
3.4. Gross Value added (GVA) (in euros) in the last three years (if available) in the country.	1 820 900 Millions € (INSEE, 2012 base 2005)

**iv. GVA – Details by NACE activities (data)**

Sector	GVA of coastal regions (billion EUR) (Source INSEE, 2012)	Share in the national GVA for the sector
Agriculture, Aquaculture and Fishing (A)	12,25 (French overseas departments excluded)	34,2 /100
Manufacturing (C)	54,00 (French overseas departments excluded)	23,6/ 100
Construction (F)	26,79 (French overseas departments excluded)	23,9 /100
Wholesale and retail trade; transport; accommodation and food service activities; information and communication (G-J)	271,20	19,2/ 100

**v. Employment – Details by NACE activities (data) - 2012**

Sector	Employment of coastal regions (thousand)	Share in the national employment for the sector
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Sector	Employment of coastal regions (thousand)	Share in the national employment for the sector
Agriculture, Aquaculture and Fishing (A)	279 500	36/100
Manufacturing (C)	1 011 100	26,9/100
Construction (F)	506 600	26,7 100
Wholesale and retail trade; transport; accommodation and food service activities; information and communication (G-J)	1 359 700	23,9/ 100

**B – Marine and maritime economic activities (MEAs)**

**Overview of relevant maritime economic activities in FRANCE at NUTS-0 level (Country level).**

Maritime economic activity		Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year
<b>0. Other sectors</b>						
0.1	Shipbuilding (excl. leisure boats) and ship repair	0,91 (2010)	16 ,5 (2010)	76 (2007)	Turnover : 4,54 (2010)	IFREMER, DEMF 2011
0.2	Water projects	0,58 (2010)	5,3 (2010)	157 (2010)	Turnover : 1,06 (2010)	IFREMER, DEMF 2011
<b>1. Maritime transport</b>						
	Shipping (total)	1,65 (2007)	14 057 (2007) DEMF	About 100 companies (900 ships of which 547 registered in France)	Turnover : 10,4 (2007), 12,7 (2010)	IFREMER, DEMF 2011
1.1	Deep-sea shipping	No data in French statistics	22 000 (of which 16 000 sailors (Armateurs de France)			Cluster Maritime Français Armateurs de France



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Maritime economic activity		Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year
1.2	Short-sea shipping (incl. Ro-Ro)	No data in French statistics				
1.3	Passenger ferry services	No data in French statistics				
1.4	Inland waterway transport	0,207 (2009)	3,8 (2009)		Turnover : 0,65 (2009)	IFREMER, DEMF 2011
<b>2. Food, nutrition, health and ecosystem services</b>						
2.1	Fish for human consumption Of which : -Fishing - Fish trade -Fish processing	No data at the total fishing industry level  0,62 (2009) 0,335 (2009) 0,59 (2009)	32 (2009)  Of which 10,9 (2009)  6,2 (2009)  15,6 (2009)	4 837 units (boats) 706 349	Turnover total fishing industry : 7,1 (2009) Of which : Fishing : 1 (2009) Fish trade: 3,1 (2009) Fish processing : 3	IFREMER, DEMF 2011
2.2	Fish for animal feeding	Not identified (minor sector in France)				IFREMER, DEMF 2011



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Maritime economic activity		Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year
2.3	Marine aquaculture	0,45	9,5 in shellfish farms	2 952 shellfish farms	Turnover ; 0,845 (of which 80 % for shellfish farming)	IFREMER, DEMF 2011
2.4	Blue biotechnology	No specific data for marine biotechnology		No data at national level		
2.5	Agriculture on saline soils	Not available	Not available	Not available		
<b>3. Energy and raw materials</b>						
3.1	Offshore oil and gas	2,35 (2009)	25 (2009)		Turnover : 8,2	IFREMER, DEMF 2011
3.2	Offshore wind	0	0	0		
3.3	Ocean renewable energy	0	0	1		
3.4	Carbon capture and storage	0	0	0		
3.5	Aggregates mining (sand, gravel, etc.)	0,025 (2009)	0,65 (2009)	12 (2009)	Turnover : 0,073	IFREMER, DEMF 2011
3.6	Marine minerals mining	No existing activity in France	0	0		
3.7	Securing fresh water supply (desalination)	No activity in France	0	0		
<b>4. Leisure, working and living</b>						
4.1	Coastal tourism	9,8 (2009)	215			

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Maritime economic activity		Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year
4.2	Yachting and marinas	0,277 (leisure boatbuilding in 2009)	40 (total leisure boats industry in 2009) of which : 8,3 in boatbuilding (9,9 in 2008)  50 (total leisure boats industry in 2011)	5 000 enterprises in 2011 of which 350 in boatbuilding and repair  370 marinas	Turnover : 4,5 for total leisure industry 1 for leisure boat building and repair	IFREMER, DEMF 2011 ; Cluster Maritime Français (CMF)
4.3	Cruise tourism		14,2		Total spending :1, 076 billions € in 2013 About 2,4 million passengers visit French ports.	CLIA 2014 (Cruise Line International Association)
<b>5. Coastal protection</b>						
5.1 – 5.2	Coastal protection against flooding and erosion	Not found				

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Maritime economic activity		Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year
5.3	Protection of habitats					

**Breakdown of maritime economic activities at regional level (NUTS 2) in the Atlantic NUTS2 regions of the country.**

Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
<b>0. Other sectors</b>				
0.1	Shipbuilding (excl. leisure boats) and ship repair	Shipbuilding concern one major shipyard (in St Nazaire) , 3 middle-size (between 250 and 500 workers) and various smaller one. Ship repair concern one major centre in Brest (1 military) and 1 civilian ...		Le Marin; GICAN, SEA EUROPE, CMF
0.2	Water projects			
<b>1. Maritime transport</b>				
1.1	Deep-sea shipping	In the concerned area of continental France, are located 3 large ports (traffic > 25 M tonnes – Le Havre (more than 60 M tonnes), Nantes and Rouen, 2 middle-sized (Bordeaux and La Rochelle, 8< traffic<10 M	There are not many headquarters of French companies in deep sea fishing in the area, except in Bordeaux which host the 2 main French oil tankers companies.	Le Marin (“Navires de commerce français 2012



Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		tonnes) and various smaller one which hosts deep-sea large ships (containers, dry bulk, oil, LNG..) of about 2- 4 M tonnes (Caen, Brest, Lorient, Bayonne and in the French overseas departments Fort de France (Martinique) and Pointe à Pitre (Guadeloupe)		
1.2	Short-sea shipping (incl. Ro-Ro)	In 2012-14 a motorway of the sea lined Nantes to Gijon, and various container feeder lines links ports such as Nantes, Brest and Bordeaux to the international hub of Le Havre. Combined Ro-Ro and passengers services link Haute Normandie, Basse Normandie and Brittany (Dieppe, Le Havre, Caen, Cherbourg, Saint Malo, Roscoff) to UK and Ireland.	Roscoff hosts the headquarters of Brittany Ferries, the major French car ferries company in the area.	Le Marin ("Navires de commerce français 2012)
1.3	Passenger ferry services	In addition to the combined Ro-ro services between Brittany	In addition to Brittany ferries there numerous (between 15 and 20) small	Le Marin ("Navires de commerce français 2012 »)



Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		and Normandy for one site to UK and Ireland from on side, there are several small ferries or passengers ships for coastal French islands (Belle-Ile, Groix..) or Jersey and Guernesey. In Guadeloupe local companies link the main island to two other smaller one (La Desirade, Marie Galante)	companies involved in transport of passengers for coastal islands.	
1.4	Inland waterway transport	The waterway transport concerns mainly the Seine river (50 % of the total French inland waterway transport in tons-km) and at a lower level the Garonne river and the estuaries of Gironde and Loire.		
<b>2. Food, nutrition, health and ecosystem services</b>				
2.1	Fish for human consumption	Fishing for human consumption is a major sector in the area with most of major fishing ports in Brittany, Pays de Loire, Basse Normandie.	The fishing fleet has been greatly reduced during the year 1990- 2000, from 7 100 to 4 400 units in continental France (overseas departments	Le Marin French Directory for fisheries and aquaculture

Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		<p>The fishing industry includes the fishing sector, the fish trade and the fish processing.</p> <p>The area hosts most of the major fish auctions : Lorient (1<sup>st</sup> rank in France among 36 in 2013) , Le Guilvinec (3<sup>rd</sup>), Erquy (5) Concarneau (7), Saint-Guenolé (8) and Saint Quay Portrieux in Brittany, Les Sables d’Olonnes (4) in Pays de Loire, La Cotinière (6) in Poitou-Charente and St –Jean de Luz (9) in Aquitaine.</p> <p>Concerning value of fish landed and sold in these ports the main species are 1) monkfish, 2) sole, 3) sea bass, 4) scallops 5) hake</p>	<p>excluded.</p> <p>If less acute this reduction continued from 2 000 to 2010 (3 800) and from 2010 to 2014 (3 600 units).</p> <p>About 120 fishing units are large ships (length above 25 m) of which very large tuna purse seiner registered in Brittany but operating off West Africa or Seychelles and big trawlers. About 900 others units are middle size boats (12-25 m) of which a majority of trawlers.</p>	
2.2	Fish for animal feeding	Fishing for animal feeding is not developed in the area		
2.3	Marine aquaculture	Marine aquaculture concerns mainly shellfish of which mainly oyster and mussels (95 %	192 000 tons of which: -186 000 of shellfish (98 000 tons of oysters, 87 000 tons of mussels)	French directory for fisheries and aquaculture

Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		of aquaculture production). "Production areas are mainly in Poitou-Charente, Basse Normandie and Brittany. Fish farming concerns mainly turbot and sea trout) but is modest compared to continental aquaculture.	- 5 700 tons of fish (mainly sea bass and sea bream)  ( In addition, there is a continental aquaculture, concerning production of fishes (44 000 tons of which 35 000 tons of trouts).	
2.4	Blue biotechnology	Blue biotechnology is a developing sector in the area. It is difficult to assess the sector are from one side, data concern mainly the biotechnology sector without identifying the marine component. There are more data for Brittany (the leading region) but it is some times difficult to distinguish "pure biotech" which use high tech to use some marine based molecule and an important component of marine bio resources processing but not strictly biotech (i.e the seaweeds processing sector in Brittany)	Brittany host 62 companies involved in marine biotechnology and 15 research laboratories of which those of the biologic station in Roscoff.	Capbiotek

Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
2.5	Agriculture on saline soils	There is no specific information in this field. Available data concern agriculture on coastal cities and villages or regions but not specifically on saline soils. Agriculture on saline soils in the concerned area deals with various activities such as sheep breeding such as in the Mount St-Michel Bay (West Basse Normandie, and North East Brittany or salicornes crops in marshes of Poitou Charente?		
<b>3. Energy and raw materials</b>				
3.1	Offshore oil and gas	There is no production activity in the area but some companies and services working for the sector (engineering, manufacturing of tubes, anchors..), tools for exploration of oil and gaz. Moreover a lot of crew of offshore fleets came from Brittany.		

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PROMOTING **SMART SUSTAINABLE AND INCLUSIVE** GROWTH FOR THE ATLANTIC AREA

Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
3.2	Offshore wind	There are no wind farms in France, but 5 projects in Haute-Normandie, Basse Normandie and Pays de Loire.		
3.3	Ocean renewable energy	There are no farms save La Rance tidal dam located in Saint Malo (North Brittany) built in the 1960's. In addition, there are some projects of pilot farms and test sites (mainly for current and wave energy ) in Brittany, Pays de Loire and Basse-Normandie.		
3.4	Carbon capture and storage	No project in the area		
3.5	Aggregates mining (sand, gravel, etc.)	Sand and gravel collection, for various purposes: building, coast reconstruction, agriculture, water treatment. Major production areas: Northern Brittany, Charente maritime, Haute Normandie.	Production : about 7 000 tons in 2010 12 companies and 15 ships	IFREMER, DEMF 2011
3.6	Marine minerals mining	No activity in the area		



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PROMOTING **SMART SUSTAINABLE** AND **INCLUSIVE** GROWTH FOR THE ATLANTIC AREA

Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
3.7	Securing fresh water supply (desalination)	No activity in the area		
<b>4. Leisure, working and living</b>				
4.1	Coastal tourism	A major, if not the first sector of the marine economy. The Atlantic coast - from Brittany to Poitou-Charente - hosts a lot of beaches, marinas, and place for nautical sports. Aquitaine is a hot spot of surf and associated ports. Fishing in foot and shellfish consumption are popular in the whole area. Cultural tourism is widespread from the Normandy coast to the Basque country with several aquariums (Brest, La Rochelle, Saint-Malo, Biarritz) maritime museums (Cherbourg, St Malo, Brest, Douarnenez, Concarneau, Lorient, La Rochelle..	First sector for employment (> 200 000 persons) but often as a seasonal business.	
4.2	Yachting and marinas	The Nautical industry is a developing sector in boatbuilding and boat repair, equipment manufacturing, Conversely to the Mediterranean French shore	Turnover Beneteau : 600 millions € (boat sector only)	



Maritime economic activity	Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
	<p>which host motor boats, most of leisure units are sailing boats on the West Channel and Atlantic French coast ( but not In French overseas departments)</p> <p>Several large marinas in the area in continental France. Majors ones are La Rochelle (4 400 berths), Arcachon and Brest (2 000 to 3 000). Then there are 15 marinas of 1 000 to 1 500 berths and 20 others of 500 to 1 000 berths. French overseas departments host about 15 marinas.</p> <p>The major area for boatbuilding are Pays de Loire, ( Saint Gilles Croix de Vie, les Sables d’Olonnes) Poitou-Charente (La Rochelle area) and South Brittany. Pays de Loire hosts one of the biggest world leisure boat builders (Beneteau). In addition the French Atlantic area hosts a lot of companies</p>	<p>77 ports on the concerned area of continental France (of which 43 in Brittany) with 48 230 berth ( of which 25 901 in Brittany)</p> <p>(about 2 000 berths in French overseas departments)</p>	<p>Observatory of leisure ports</p>

Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		involved in manufacturing equipment (sails as navigation help systems, anchors..)		
4.3	Cruise tourism	<p>Cruise tourism is a developing sector for 10 years</p> <p>In the concern area, Le Havre is the leading port welcoming 277 000 passengers in 2012 (1/2 of the leading European Atlantic Port (Lisbon) and 1/3 of the French leading port Marseille. Other ports of continental France welcome also passengers at a lower scale: La Rochelle (70 000), Cherbourg (58 000), Rouen, Brest...</p> <p>Cruise tourism is a major sector in economy of La Martinique and Guadeloupe (between 200 000 and 250 000 cruise passengers for each port of Fort de France and Pointe à Pitre.</p>	<p>In 2013, the cruise industry spent 1 billion € in France (of which 1/3 through shipbuilding in Saint-Nazaire the only French shipyards for liners.</p> <p>The whole sector employed 14 000 persons (including shipbuilding)</p>	<p>CLIA France (Cruise Line International Association) 2014 CLIA Europe 2013</p>
<b>5. Coastal protection</b>				
5.1 – 5.2	Coastal protection against flooding and erosion	Erosion is a permanent issue at usual times with higher peaks of interest following damaging	In France 25 % of the shoreline (that is 1 700 km) is submitted to erosion.	CEREMA



Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		climatic event (storm Xynthia which led to major flooding further breaking of dikes in Pays de Loire, or majors damages further to storms during winter 2014 which increased erosion on various points of the Atlantic coast.		
5.3	Protection of habitats	Marine parks are developing (1 existing for some years in Brittany, 1 from 2014 in Charente Maritime, and other projects. In addition the area host several Natura 2 000 or other protected zones.		AAMP : Agence Marine des Aires Protégées (French Agency for Marine Protected areas)

**C. List of existing clusters operating in areas of relevance for the Atlantic Plan.**

Name of the cluster	Responsible body	Contact details of person of contact (name, family name, telephone, mobile phone, email, website, postal address)	Source of funding	Name of Members	National / Regional level	Maritime sector(-s) concerned	Objective	Geographic area covered
<b>Cluster Maritime Français</b>		<b>Francis VALLAT –</b> Président	Contribution of members.	358	National	All	Promotion of the French maritime sector. Networking	France

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Name of the cluster	Responsible body	Contact details of person of contact (name, family name, telephone, mobile phone, email, website, postal address)	Source of funding	Name of Members	National / Regional level	Maritime sector(-s) concerned	Objective	Geographic area covered
<a href="mailto:contact@cluster-maritime.fr">contact@cluster-maritime.fr (link sends e-mail)</a> Tel : +33 (0)1 42 25 00 48  47, rue de Monceau 75008 Paris		<b>Philippe PERENNEZ</b> - Directeur Général Mail : <a href="mailto:p.perennez@cluster-maritime.fr">p.perennez@cluster-maritime.fr (link sends e-mail)</a> Mobile : +33 (0)6 72 15 24 89					of members. Organisation of events (as the yearly Maritime Economy forum). Networking of European maritime cluster. Lobbying at French or European level to support the maritime industries.	
Pole Mer Bretagne Atlantique		Patrick POUPON – Directeur - + 33(0) 298 05 70 21 <a href="mailto:Patrick.poupon@polemer-ba.com">Patrick.poupon@polemer-ba.com</a>	Contribution of members + funding from the French Government and local authorities (Regional Council of Brittany and departments (counties) councils	300	Regional (Brittany, Pays de Loire, Basse, Normandie	all	Favour funding of research projects in marine sciences and technology, associating private companies.	Brittany, Pays de Loire, Basse Normandie



**D. List of maritime strategies at regional and national level, as well as those under preparation.**

Title of the official document	Responsible body	National / Regional level	Maritime strategy concerned	Publishing date	URL	Objective (max 150 words)	Beneficiaries	Source of funding	Budget	Geographic area covered	Population interested
Rapport : Une ambition maritime pour la France	Secrétariat Général de la Mer	National	French national maritime strategy	2006		Report for an integrated maritime policy		French Government		France (including overseas departments and territories)	Maritime sector stakeholder and administrations
Grenelle de la mer – 2 <sup>nd</sup> rapport d'étape	Ministry ecology, sustainable development, transport and housing	National	French national maritime policy	2012		Report on results on consultations of stakeholder of the maritime sector called "Grenelle de la mer" – 2009-2012		French Government		France (including overseas departments and territories)	Maritime sector stakeholder and administrations
Assises de la	Ministry	National	French	January		Synthesis		French		France	Maritime

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Mer et du littoral	ecology, sustainable development and energy		national policy for the sea and coastal zones	2014		of reports of stakeholders presented during the National Council for the sea and coastal zones		Government		(including overseas departments and territories)	sector stakeholder and administrations
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