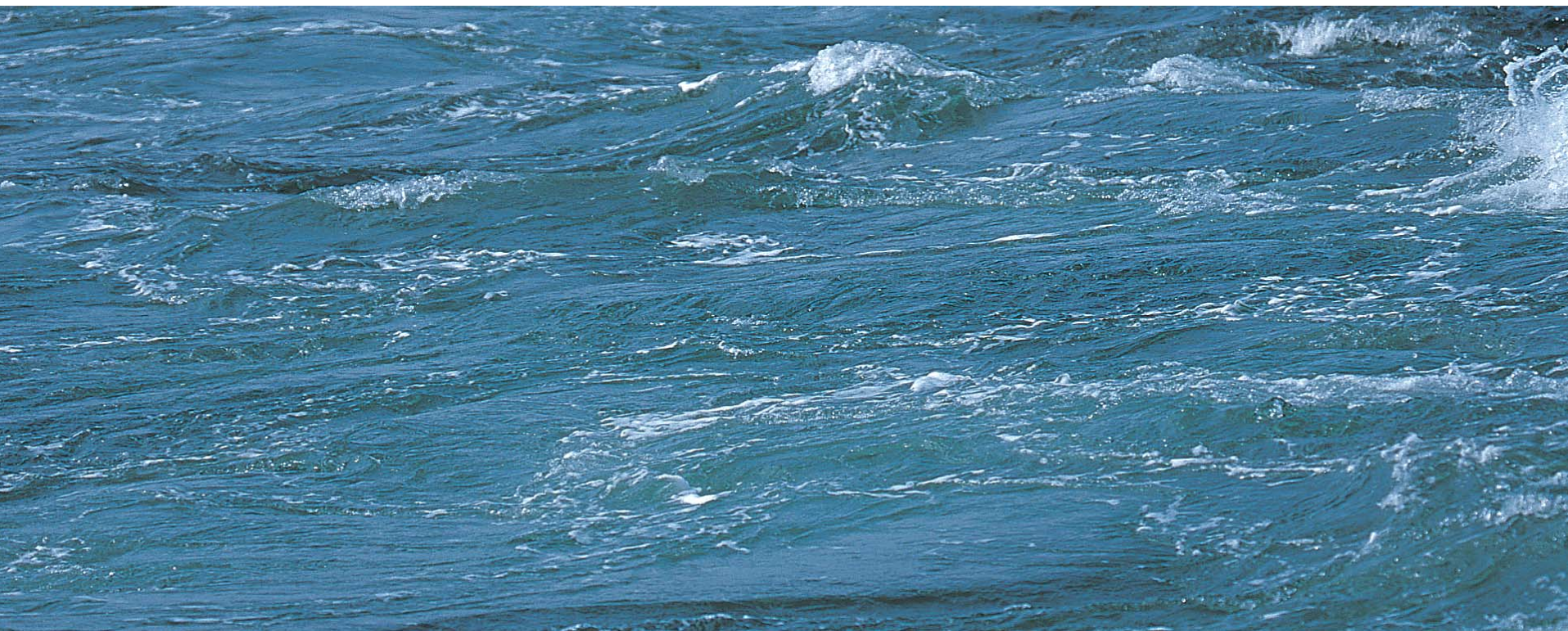


INNOVATION IN FISHERIES CHAINS & NETWORKS



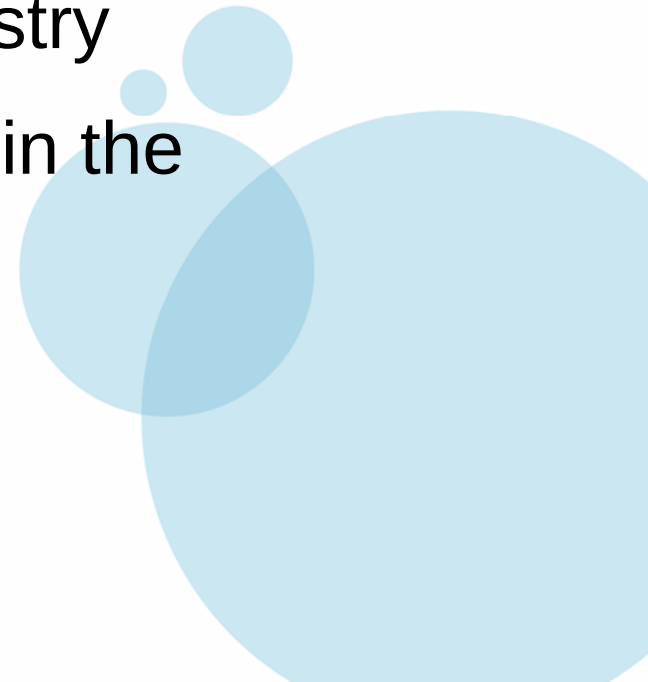
Monday, 20 November 2006



Presentation by
Marianne Raben Olrik
Danish Fishermen's Association

INNOVATION IN FISHERIES CHAINS & NETWORKS

1. General developments in the fisheries industry in Europe
2. Developments in the labour market for fisheries and the seafood industry
3. Future skills needs of workers in the fisheries sector



1. General developments in the fisheries industry in Europe

FISH

Prices:

- More dependant on world marked prices

Quality:

- See packing
- More “power” to the consumers

Quantity of fish:

- Decreasing quotas
- More control & regulation



1. General developments in the fisheries industry in Europe

Decreasing EU production

Total fishery products (tonnes)	1994	2004	Change			1994	2004	Change
Spain	1.274.020	1.217.326	-4%		Lithuania	51.036	164.685	223%
Denmark	1.886.608	1.132.545	-40%		Finland	167.994	147.542	-12%
France	930.901	912.421	-2%		Latvia	138.665	125.936	-9%
United Kingdom	963.648	862.136	-11%		Estonia	124.097	88.156	-29%
Netherlands	529.306	600.561	13%		Belgium	35.106	27.774	-21%
Italy	575.160	396.867	-31%		Czech Republic	22.610	23.912	6%
Ireland	319.250	338.609	6%		Hungary	18.206	19.986	10%
Germany	277.067	319.332	15%		Cyprus	9.718	3.987	-59%
Sweden	394.231	275.925	-30%		Slovakia	3.488	2.783	-20%
Portugal	273.502	228.188	-17%		Austria	3.491	2.667	-24%
Poland	462.532	227.365	-51%		Slovenia	3.133	2.592	-17%
Greece	214.307	190.145	-11%		Malta	3.260	1.935	-41%
					European Union (25)	8.681.335	7.313.377	-16%

1. General developments in the fisheries industry in Europe

Increasing global production

Total fishery products (tonnes)	1994	2004	Change
European Union (25 countries)	8.681.335	7.313.377	-16%
Europe	17.293.795	16.313.782	-6%
Africa	5.667.731	7.869.297	39%
North America	9.066.164	8.799.906	-3%
South America	22.935.204	19.061.243	-17%
Asia	64.654.685	101.558.680	57%
Australia	239.358	280.141	17%
New Zealand	500.916	631.886	26%
All countries of the world	120.716.550	155.214.930	29%

1. General developments in the fisheries industry in Europe

VESSELS

More safety

Better working conditions

New technique

New electronics

More effective



1. General developments in the fisheries industry in Europe

Decreasing number of vessels

Number of vessels	1995	2005		1995	2005
Greece	20.718	18.275	Estonia	:	1.045
Italy	19.359	14.459	Poland	:	974
Spain	18.385	13.691	Latvia	:	928
Portugal	11.746	9.955	Cyprus	:	887
France	6.598	7.859	Netherlands	1.023	830
United Kingdom	9.655	6.774	Lithuania	:	272
Denmark	5.180	3.274	Slovenia	:	169
Finland	4.106	3.267	Belgium	154	121
Germany	2.392	2.121	European Union	105.863	89.373
Sweden	2.508	1.640	European Union		83.677
Malta	:	1.421	(15)		
Ireland	2.044	1.411			

1. General developments in the fisheries industry in Europe

Decreasing tonnage

Gross tonnage	1995	2005		1995	2005
Spain	607.493	487.397	Latvia	:	38.541
United Kingdom	270.586	218.713	Poland	:	30.260
France	179.207	215.116	Estonia	:	24.216
Italy	258.540	213.231	Belgium	22.870	22.686
Netherlands	180.205	171.988	Malta	:	19.006
Portugal	127.880	108.697	Finland	24.668	17.126
Greece	110.224	93.012	Cyprus	:	9.121
Denmark	107.124	91.961	Slovenia	:	1.060
Ireland	60.717	87.753	European Union	2.086.616	2.025.146
Lithuania	:	64.404	European Union (15)		1.836.533
Germany	76.887	64.075			
Sweden	58.220	44.778			

1. General developments in the fisheries industry in Europe

Old vessels

Vessels aged 25 years or more (Percent of the total fleet)	1995	2005
Denmark	21	59
Slovenia	:	59
Portugal	0	56
Sweden	33	55
Ireland	32	52
Poland	:	51
Spain	:	50
Lithuania	:	44
Italy	34	43
Greece	26	41
Cyprus	:	37
United Kingdom	25	36

	1995	2005
Malta	:	35
Netherlands	38	35
Latvia	:	33
Finland	14	30
France	:	29
Belgium	0	27
Germany	9	21
Estonia	:	19
European Union	17	43
European Union (15)		43

1. General developments in the fisheries industry in Europe

Summary general developments:

The production is decreasing

The number of vessels are decreasing

Power to the consumers

⇔ The sector is getting smaller



2. Developments in the labour market for fisheries and the seafood industry

Labour market in general:

- Low unemployment rates
- A lot of opportunities
- Demography



2. Developments in the labour market for fisheries and the seafood industry

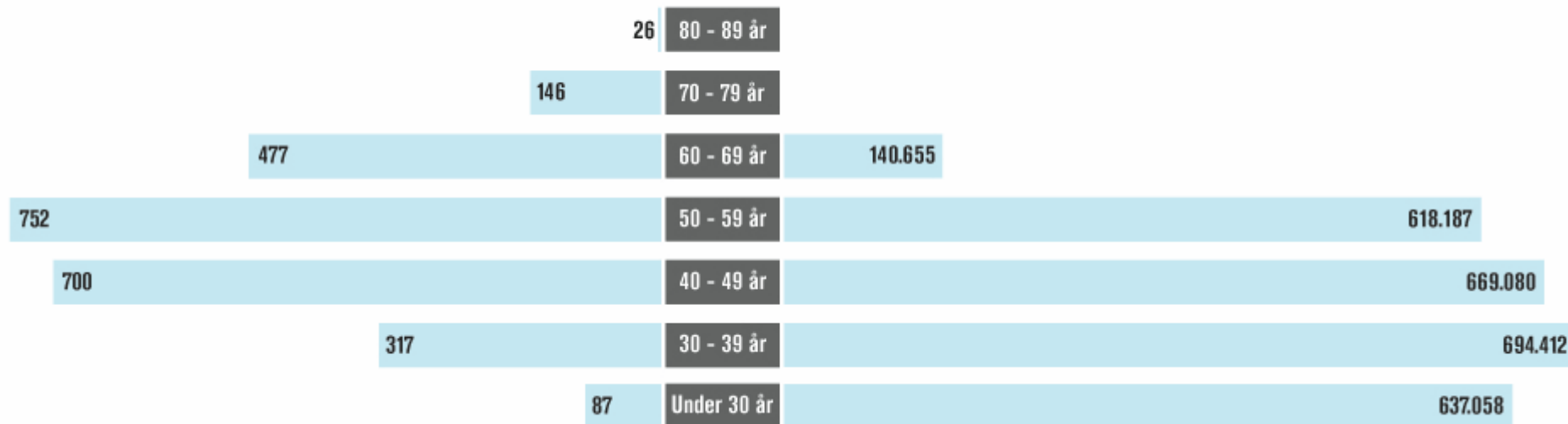
Labour market in the fisheries sector:

- Low unemployment rates
- A lot of opportunities
- Demography

The Danish ship owners 2005

Alder

The Danish workforce 2005



Kilde: Fiskeridirektoratet

Kilde: Danmarks statistik

2. Developments in the labour market for fisheries and the seafood industry

Employment in the fishery sector	1994	2004	Change
Greece	32.704	:	
Spain	77.962	:	
Ireland	7.700	:	
Italy	45.000	:	
Lithuania	:	:	
Luxembourg	:	:	
Hungary	4.300	:	
Malta	1.780	:	
Netherlands	3.762	:	
Austria	2.300	:	
Poland	11.187	:	
Slovakia	:	:	

Employment in the fishery sector	1994	2004	Change
France	33.629	32.064	-5%
Portugal	31.721	21.345	-33%
United Kingdom	21.874	11.720	-46%
Estonia	11.225	8.430	-25%
Finland	5.566	4.762	-14%
Denmark	6.256	4.197	-33%
Latvia	4.751	4.115	-13%
Germany	4.209	3.904	-7%
Sweden	3.500	1.913	-45%
Czech Republic	2.039	1.849	-9%
Cyprus	1.159	1.123	-3%
Belgium	652	880	35%
Slovenia	174	352	102%

2. Developments in the labour market for fisheries and the seafood industry

The labour market for fisheries and the seafood industry

Possibilities:

- A free life
- A lot of technique and electronics
- Relatively high income

Treats:

- Regulations
- Image
- The family needs you
- Facilities on board
- Other possibilities
- Manual work



3. Future skills needs of workers in the fisheries sector

Motivation

Leadership

Dare to run a risk

Life long learning

Technical know how

Understanding of safety

Innovator



INNOVATION IN FISHERIES CHAINS & NETWORKS

REFOPE

- A European network on education & recruitment

Register of European training centres

Preparing a safety guide for all EU vessels

Organizing seminars and international meetings



INNOVATION IN FISHERIES CHAINS & NETWORKS

THE FISHERIES CIRCLE

- A Danish network on education & recruitment

Image and recruitment

Advertising (television, cinema, exhibitions, newspapers)

“Open vessel”

Educational materials for primary schools

Visits at primary schools



INNOVATION IN FISHERIES CHAINS & NETWORKS



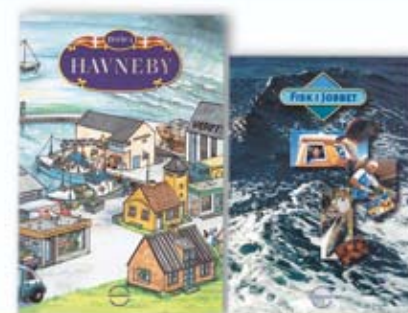
plancher



hæfter



cd-rom



bøger



fagbøger



kortspil

INNOVATION IN FISHERIES CHAINS & NETWORKS

The educations

Values

Strategy

Quality

- Teachers skills (pedagogy,...)
- Students skills
- Traineeship on board vessels
- Contact to the sectors
- Educational materials
- Facilities at school
- Coaching



INNOVATION IN FISHERIES CHAINS & NETWORKS

There is an ocean of opportunities...

CATCH'EM!!!



THE FISHERIES CIRCLE