JRC Scientific and Technical Reports

Scientific, Technical and Economic Committee for Fisheries (STECF)

Report on the Evaluation of Data Collection Related to the Fish Processing Sector (SGECA 09 03)

19-23 OCTOBER, ISPRA

Edited by Ralf Döring & Jordi Guillen

EUR 24140 EN - 2009

JRC EUROPEAN COMMISSION

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JRC 56380

EUR 24140 EN
ISBN 978-92-79-14845-3
ISSN 1018-5593
DOI 10.2788/5476

Luxembourg: Office for Official Publications of the European Communities

Printed in Italy

Table of contents

REPORT ON THE EVALUATION OF DATA COLLECTION RELATED TO THE FISH PROCESSING SECTOR (SGECA 09 03)

SUBGROUP ON ECONOMIC AFFAIRS (SGECA) OF THE SCIENTIFIC, TECHNICAL AND ECONOMIC COMMITTEE FOR FISHERIES (STECF)

STECF OPINION EXPRESSED DURING THE PLENARY MEETING (PLEN-09-03)

9-13 NOVEMBER 2009, BRUSSELS

1. Introduction

STECF is requested to review the report on the Evaluation of Data Collection Related to the Fish Processing Sector of the SGECA 09 03 meeting of October 19-23, 2009 (Ispra), evaluate the findings and make any appropriate comments and recommendations.

This report constitutes the first attempt to compile national statistics and give an overview on the performance of the fish processing industry in the EU. Since 2006, Member States have to collect data on the fish processing industry under the Data Collection Regulation. This has allowed working in this report with 2006 and 2007 data.

The report first presents the data at the national level and later at the EU level, showing the importance of this sector, with a turnover around 25 billion Euros, Gross Value Added of around 4 billion Euros and more than 120 thousand employees. The report also deals with the trends and drivers for change in the fish processing industry and the future possible issues following the data analysis. Hence this report helps to quantify the importance of this industry, necessary since the fish processing industry is an important driver to accomplish the basic aims of the Common Fisheries Policy: the sustainable use of marine resources.

When reviewing the draft report, a particular attention should to be paid to the methodology applied to produce indicators and assess such data and the content of the chapters on trends and drive for change and future possible issues following the data analysis

2. Terms of Reference

Taking the first DCR call for fish processing data, SGECA 09-03 is requested to analyse and comment on the data delivered and if possible economic performance of MS national fish processing sector. JRC shall compile the data into similar tables for each of the MS as far as possible.

SGECA 09-03 is especially requested to work on and comment on the following items:

1. Data Coverage and quality

2. Data Analysis and description:
   a) National level (preparing a chapter for each MS)
   b) EU level
   c) Description of trends and drivers for change (e.g. relevant information on policies that affect economic performance)

3. Discussion of future possible issues following the data analysis:
   a) Dependence of the industry on the EU-fleet and, therefore, also the quotas
   b) Regional level (defining of regions, comparability of data etc.)
   c) Are there possibilities for a deeper economic analysis?
   d) Regional importance of the industry, sector specifics in connection with the industry
   e) Analysis of cost structures and vulnerabilities

3. STECF comments and recommendations

STECF recognises the fish processing industry as an important factor contributing to accomplishing one of the basic aims of the Common Fisheries Policy: the sustainable use of marine living resources. Therefore, STECF sees this first evaluation of data from the fish processing industry as an important step to show how the catching and processing sectors can interact and affect each other's success. It additionally may show the linkage between consumer preferences, fish processors and the catching sector (as in the case of certification).

STECF observes that the report is a good attempt at the first EU-wide analysis of the performance of the fish processing sector.

STECF notes that given the late availability of data to the working group, the working group members found it difficult to complete and check their work during the week available.

STECF recognises that SGECA 09-03 managed to address to some extent all Terms of Reference with the exemption of 3e. However, STECF notes that some of the responses to the TORs need further discussion or improvement. Some MS did not deliver data or delivered only part of the data requested. Some data sets are internally inconsistent and there are large differences in the amount of data delivered by various countries.

STECF notes that some of the indicators presented, such as turnover per employee, seem highly implausible, and that this could have been mentioned in the working group report. STECF further notes that for some of the MS whose figures seemed implausible, there was no expert who could be asked to check the validity of the figures.

STECF observes that there is room for error and misunderstandings in regulation 1639/2001 concerning the parameters collected under the DCR. There is also large variation in which parameters were reported and the level of detail in the data. The heterogeneity in parameters that were collected and reported undermines the possibility to conducts analyses on a larger scale and on an EU level.

STECF regrets that some MS have not submitted data that is required by regulation 1639/2001. STECF observes that MS must follow the specifications in regulation 199/2008 and the guidelines for data collection under the DCF provided by SGECA 08-01 and SG-RN/ECA 09-03 in order for JRC or working groups to be able to analyse the data.

STECF further notes that in particular the issues raised under TOR 3 on a discussion of future possible issues following from the data analysis need to be addressed in more depth. Point 3 e) on cost structures and vulnerabilities was not addressed at all, point 3 d) on regional dependency on the fish processing industry was included in the national chapters and for 3 b) it is not clear that a regional or segment specific (e.g. whitefish segment) analysis makes sense at all.

Data on the fish processing industry are partly collected by national statistical offices. There are two regulations for the data collection: NACE and ProdCom (both under number 10.20,

fish processing industry). NACE is a systematic approach to data collection from a company perspective following the main activity. A company may have many activities, one of which is fish processing. This source of information only includes data on cost structure. In cases where fish processing activity is of minor importance to the company it is not reported as fish processing. Especially in large companies this might lead to bias in the data and any analyses conducted.

The second main regulation for collection of data is the ProdCom. In this case companies have to deliver data on production of commodities. In this case all companies above 20 FTE have to deliver data on their fish products. However, under this regulation sales prices and sales volume are the only data requested. Nevertheless, the ProdCom gives a better overview of total production. It is a problem that there are differences in how MS interpret the different categories under 10.20, and in many cases this makes it impossible to compare the data between countries.

STECF observes that in the new DCF, especially in Commission Regulation 1581/2004 and 199/2008, collection of data on amounts of raw material is no longer requested. STECF suggests that a critical analysis of the technical reports, national programmes and this report is necessary to clarify the possibilities and practicalities of collecting data on the amounts of raw material used in the processing industry. These data is crucial to answer the question on the linkages between the processing sector and the EU fleet. STECF suggests that the Commission should clarify this via a study or a separate working group. If there is to be a separate committee on the quality of economic data then that committee could deal with this issue as well.

STECF observes that the SGECA 09-03 working group developed a format and structure for the national chapters and for some useful indicators. STECF notes that a publication equivalent to the Annual Economic Report of EU Fishing Fleets would be a useful presentation of the data and analysis conducted by the working group and may be done every year to be able to show trends in the industry. For next year **STECF recommends** additionally a follow up on some of the issues not adequately addressed in this first report. The TORs for next year's meeting should include at least: data coverage and quality, national chapter, EU level analysis, discussion of possibilities for deeper economic analysis, analysis of cost structures and vulnerabilities.

STECF observes that section 9.2. of the working group report presents possible deeper economic analysis based on data collected under the old and new data regulations. The possibilities presented here are ambitious, and are not feasible if economic data are provided on a national level only, as requested by the DCR/DCF. In order to be able to conduct the analyses proposed here, **STECF recommends** that at the national institutes, data should be disaggregated by either type of commodity or by company size.

STECF recommends that working groups and calls for data are better organised and co-ordinated so that data are received by JRC staff, analysed and checked with the appropriate MS where necessary, before the start of the STECF working group. The previously suggested

STECF time frame (see STECF 2008[1] [winter plenary report]) the preparation of the fleet data could be taken as a basis.

[1] STECF 2008. 29th Plenary Meeting Report of the Scientific, Technical and Economic Committee for Fisheries (PLEN-08-03). Office for Official Publications of the European Communities, Luxembourg, EUR 23624 EN, JRC48911.

ANNEX I

SGECA-09-03: REPORT ON THE EVALUATION OF DATA COLLECTION RELATED TO THE FISH PROCESSING SECTOR.

Ispra, 19-23rd October 2009,

This report is the opinion of the expert working group on Economic Affairs (SGECA-09-03) and not of the Scientific, Technical and Economic Committee for Fisheries (STECF)

This report does not necessarily reflect the view of the European Commission and in no way anticipates the Commission's future policy in this area

4. Introduction to working group report

4.1. Background

This report on the EU fish processing industry is the first attempt to compile national statistics and give an overview on the performance of the sector. The economic data used in this publication is collected within the framework of the Data Collection Regulation (DCR), cf. Council Regulations 199/2008, 1543/2000 and Commission Regulations 1581/2004 and 1639/2001. The data call requested data for the years 2006 and 2007. The data delivered by the member states can be found in the appendix.

This publication includes:

1. An overview on the data coverage and quality
2. A detailed economic and structural overview of the processing sector of most of the countries required to deliver data
3. A short overview on the EU level using indicators from the national chapters.
4. Description of trends and drivers of change
5. An overview on possibilities for deeper economic analysis.

The report has been produced by fisheries economists from DG JRC and a working group of economic experts (SGECA 09-03) under the Scientific, Technical and Economic Committee for Fisheries (STECF), which convened 19th-23rd of October 2009 in Ispra, Italy. The group consisted of 16 independent experts. The list of experts can be found in section 4.3.

4.2. Terms of Reference

Taking the first DCR call for fish processing data, SGECA 09-03 is requested to analyse and comment on the data delivered and if possible economic performance of MS national fish processing sector. JRC shall compile the data into similar tables for each of the MS as far as possible.

SGECA 09-03 is especially requested to work on and comment on the following items:

4. Data Coverage and quality

5. Data Analysis and description:
   d) National level (preparing a chapter for each MS)
   e) EU level
   f) Description of trends and drivers for change (e.g. relevant information on policies that affect economic performance)

6. Discussion of future possible issues following the data analysis:
   f) Dependence of the industry on the EU-fleet and, therefore, also the quotas
   g) Regional level (defining of regions, comparability of data etc.)
   h) Are there possibilities for a deeper economic analysis?
   i) Regional importance of the industry, sector specifics in connection with the industry
   j) Analysis of cost structures and vulnerabilities

4.3. Participants

STECF members

- Döring, Ralf (chair)
- Virtanen, Jarno

External Experts

- Avdic, Edo
- Bengtsberg, Rickard
- Beukers, Rik
- Brown, Adam
- Calvo, Cristina
- Duarte, Fernando
- Ebeling, Michael
- Goti, Leyre
- Malvarosa, Loretta
- Moura, Carlos
- Nielsen, Rasmus
- Petersen, Carsten Scotte
- Razmislaviciute-Palioniene, Agne

JRC experts

- Guillen, Jordi

European Commission

- Calvo Santos, Angel Andres
- Folisi, Floriana
- Vasilaki, Marousa

See Appendix II for contact details of the participants.

4.4. Glossary

This glossary briefly explains the definitions of the different variables used in this report. The legal basis for some of these definitions are found in Commission Regulation (EC) N° 2007/98 of 17 December 1998 concerning the definitions of characteristics for structural business statistics.

Structural indicators	
Number of firms	A count of the number of enterprises active during at least a part of the reference period
Employment (Total)	Number of people employed (includes full-time and part-time employees)
Employment (FTE)	Number of full time equivalent (methodologies to calculate one FTE varies between the countries)

Performance indicators	
Turnover	Turnover comprises the totals invoiced by the observation unit during the reference period, and this corresponds to market sales of goods or services supplied to third parties.
Income	Turnover + Subsidies + all other income. The DCR requested to deliver turnover (income) as one indicator. Some countries only reported turnover without any other components.
Gross Value Added (GVA)	Income minus production costs except labour costs. Shows the value added created by processing the raw material to the raw material itself: = Turnover – Production Costs (Excluding Labour Costs)
Gross Capital Flow (GCF)	Turnover minus all production costs. Measures in which magnitude and in which way capital flows i.e. in to or out of the firm : = Income - Production Costs (Including Labour Costs)
Earnings Before Interest and Tax (EBIT)	Income minus all production costs minus depreciation: = Income – Production Costs – Depreciation
Net Profit	Income minus all production costs minus depreciation and interest costs: = Income – Productions Costs – Fixed Costs

Return on Investment (ROI)	A performance measure used to evaluate the efficiency of an investment : = Net Profit / Total Investments
Financial Position	Ratio of own capital and borrowed capital. Measures the firms financial position. = Own Capital / Borrowed Capital

Productivity indicators	
Turnover per FTE (or Employee)	Average turnover per FTE (or employee). Used to make comparisons between segments and different member states. = Turnover / FTE (Or Number of Employees)
Net Profit per FTE (or Employee)	Average net profit per FTE (or employee). Used to make comparisons between segments and different member states. = Net Profit / FTE (Or Number of Employees)
Running Cost to Turnover Ratio in %	Ratio of production costs and turnover. Shows how much of the turnover (income) that is consumed by production costs. = Production Costs / Turnover

4.5. Chairman Comments

The SGECA 09-03 meeting was the first one on the processing industry in the European Union. The data call was published four weeks in advance to the meeting. Until November 5th 20 countries delivered data.

From the 17 countries which delivered data before the end of the meeting 11 countries were covered by invited experts. For the 6 other countries participants of the meeting were asked to provide some basic analysis following the agreed structure. Therefore, we were able to provide at least for the 17 countries which delivered data a national chapter although some chapters are quite short and with not much detail. However, before finishing, the report we asked national correspondents of these countries to give us some additional information. The same was done for the three countries which delivered data after the meeting.

For a possible second meeting we shall try to publish the data call a little earlier to have the possibility to have a look at the data well before the meeting. Also some additional experts are necessary for better country coverage and possibilities to improve the regional and sectoral analysis.

The main work at this meeting was on the national chapters. Over the four days the experts needed substantial parts of our time to agree to a common framework for the data analysis. Therefore, other TORs were not addressed that deeply during the week. This is one reason why we decided to include some examples for a deeper economic analysis from countries which have longer time series or are already analyzed there sector more deeply. With the common structure the group at the follow up

meeting will be able to allocate more time to a deeper analysis and may use these examples as food for thought.

During the meeting the group agreed to allow some freedom with the descriptions in the national chapters besides the basic tables we agreed to insert in every chapter. Therefore, all chapters are different and differ especially in length. This gave the experts room to address problems and give information's they see as relevant.

5. Data coverage and quality

This report is the first attempt to compile national statistics and give an overview on the performance of the EU fish processing industry. The data used in this publication has been collected within the framework of the Data Collection Regulation (DCR). The Data Call was issued on the 21st of September, and so the deadline for the data submission was the 19th of October. The data call requested data for the years 2006 and 2007. From the 19th to the 23rd of October took place the SGECA 09-03 meeting in order to prepare this report.

Out of the 27 countries that the EU is compounded, 5 of them do not have coastal waters, and were not included in the DCR framework (Austria, Czech Republic, Hungary, Luxembourg and Slovakia). Out of the remaining 22 countries that participated in the DCR framework Bulgaria and Romania became part of the EU in 2008, starting then the requisite to collect and report data under the DCR. Since economic data is collected for the previous year, then during 2008 it had to be collected 2007 data.

The Data call was answered by 15 countries before the deadline (68%), 2 countries submitted their data during the meeting (9%), 3 countries submitted the data after the meeting (14%) and so far 2 countries have not submitted any data (9%).

Figure 5.1 and table 5.1 inform when the data was submitted.

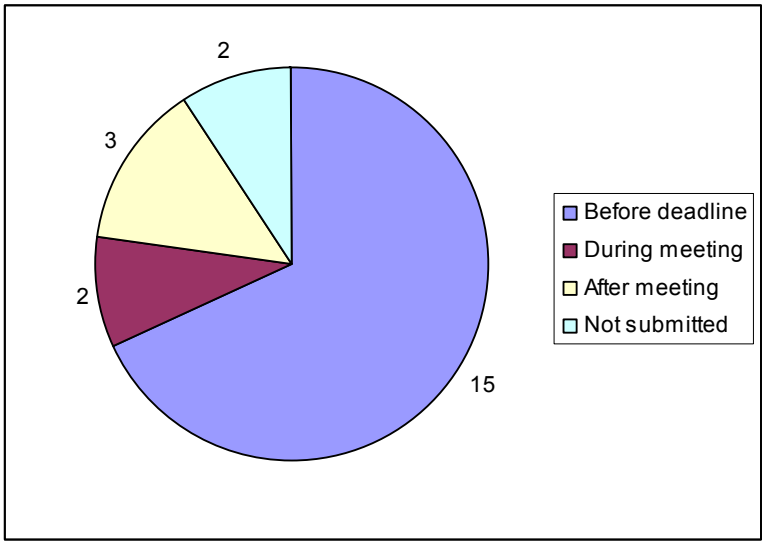


Figure 5.1: Stages at what data was submitted

Table 5.1: Stages for data submissions and resubmissions

	Submitted	Resubmissions	Comments
Belgium	Before deadline		
Bulgaria	During meeting		
Cyprus	5th November	16th December	Data in Cyprus pounds
Denmark	Before deadline	During meeting	Minor changes
Estonia	Before deadline		
Finland	Before deadline		
France	Before deadline		
Germany	Before deadline	During meeting	Minor changes
Greece	3rd November		
Ireland	-		
Italy	Before deadline	During meeting	Minor changes
Latvia	27th October	4th November	Minor changes from currency conversion
Lithuania	During meeting		
Malta	-		
Netherlands	Before deadline		
Poland	Before deadline		
Portugal	Before deadline		
Romania	Before deadline		
Slovenia	Before deadline		
Spain	Before deadline		
Sweden	Before deadline	During meeting	Minor changes
United Kingdom	Before deadline	During meeting	Minor changes

For the 2 countries that have not submitted any data so far, only Ireland informed that they were not capable to report the data in time because of the lack of staff due to the economic crisis.

However, countries that have submitted data, not often have submitted all the variables they were requested. In fact, only Poland and Slovenia reported all the requested parameters for 2007. Next table summarises the data presented and missing data by country and parameter. So, it allows checking the performance on submitting data for each MS, but it also identifies which parameters present more difficulties to be submitted.

From the table it can be seen that only 61% of all data requested for 2007 was really submitted. It should be noted that 2006 figure considers all 22 countries; however, not all countries had the obligation to submit data for that year. So, the coverage of the 48% on data submitted for 2006 would be close to the 61% in 2007 when analysing the coverage on the mandatory data.

Table 5.2: Data submitted by country

		Belgium	Bulgaria	Cyprus	Denmark	Estonia	Finland	France	Germany	Greece	Ireland	Italy	Latvia	Lithuania	Malta	Netherlands	Poland	Portugal	Romania	Slovenia	Spain	Sweden	United Kingdom	Total (%)
2006	Raw material: Total	0	1	1	0	1	1	0	1	1	0	1	0	1	0	0	1	1	0	0	1	0	0	41
	Raw material: per species	0	1	0	0	0	1	0	0	1	0	1	0	0	0	0	1	0	0	0	0	0	0	23
	Income (Turn-over) total	1	1	1	1	1	1	1	1	1	0	1	1	1	0	1	1	1	0	0	1	1	0	68
	Income (Turn-over) product	1	1	0	1	0	0	0	1	1	0	0	1	1	0	1	1	0	0	0	0	1	0	45
	Production costs total	1	0	1	1	1	1	0	1	0	0	1	1	1	0	1	1	1	0	0	1	1	0	59
	labour	1	0	1	1	1	1	0	1	0	0	1	1	1	0	1	1	1	0	0	1	1	0	55
	energy, fuel	1	0	1	1	0	1	0	1	0	0	1	1	1	0	1	1	1	0	0	1	1	0	55
	raw material	1	0	1	1	0	1	1	1	0	0	1	1	1	0	1	1	1	0	0	1	1	0	59
	packaging	1	0	1	1	0	1	0	1	0	0	0	0	1	0	0	1	0	0	0	0	0	0	32
	others	1	0	1	1	1	1	0	1	0	0	1	0	1	0	1	1	1	0	0	1	1	0	50
	Fixed costs	1	0	0	1	1	1	0	1	0	0	1	1	1	0	0	1	1	0	0	1	0	0	45
	Products Price	0	1	0	1	0	0	0	1	1	0	0	0	1	0	0	1	1	0	0	0	0	0	32
	Financial position	1	0	0	1	1	1	1	1	0	0	1	0	1	0	0	1	1	0	0	0	1	0	45
	Investments	1	0	0	1	1	1	1	1	0	0	1	1	1	0	1	1	1	0	0	1	1	0	59
	Employment: FTE	1	0	0	1	1	1	1	1	1	0	1	1	1	0	1	1	1	0	0	1	1	0	68
	Capacity utilisation	0	0	0	0	0	0	0	1	0	0	0	0	1	0	0	1	1	0	0	0	0	0	18
	Number by companies	0	1	1	1	1	1	0	1	1	0	1	1	1	0	1	1	1	0	0	1	1	0	59
	TOTAL (%)	71	35	53	82	59	82	29	94	41	0	76	59	94	0	59	100	82	0	0	65	65	0	48
2007	Raw material: Total	0	1	1	0	1	1	0	1	1	0	1	0	1	0	0	1	1	1	1	1	0	1	55
	Raw material: per species	0	1	0	0	0	1	0	0	1	0	1	0	0	0	0	1	0	1	1	0	0	0	32
	Income (Turn-over) total	1	1	1	1	1	1	1	1	1	0	1	1	1	0	1	1	1	1	1	1	1	1	82
	Income (Turn-over) product	1	1	0	1	0	0	0	1	1	0	0	1	1	0	1	1	0	1	1	0	1	0	55
	Production costs total	1	0	1	1	1	1	0	1	0	0	1	1	1	0	1	1	1	1	1	1	1	1	73
	labour	1	0	1	1	1	1	0	1	0	0	1	1	1	0	1	1	1	1	1	1	1	1	68
	energy, fuel	1	0	1	1	0	1	0	1	0	0	1	1	1	0	1	1	1	1	1	1	1	1	68
	raw material	1	0	1	1	0	1	1	1	0	0	1	1	1	0	1	1	1	1	1	1	1	1	73
	packaging	1	0	1	1	0	1	0	1	0	0	0	0	1	0	0	1	0	1	1	0	0	1	45
	others	1	0	1	1	1	1	0	1	0	0	1	0	1	0	1	1	1	1	1	1	1	1	64
	Fixed costs	1	0	0	1	1	1	0	1	0	0	1	1	1	0	0	1	1	1	1	1	0	1	59
	Products Price	1	1	0	1	0	0	0	1	1	0	0	0	1	0	0	1	1	1	1	0	0	0	45
	Financial position	1	0	0	1	1	1	1	1	1	0	1	0	1	0	0	1	1	0	1	0	1	1	59
	Investments	1	0	0	1	1	1	1	1	1	0	1	1	1	0	1	1	1	1	1	1	1	1	82
	Employment: FTE	1	0	0	1	1	1	1	1	1	0	1	1	1	0	1	1	1	1	1	1	1	1	82
	Capacity utilisation	0	0	0	0	0	0	0	1	1	0	0	0	1	0	0	1	1	1	1	0	0	0	32
	Number by companies	0	1	1	1	1	1	0	1	1	0	1	1	1	0	1	1	1	1	1	1	1	1	73
	TOTAL (%)	76	35	53	82	59	82	29	94	59	0	76	59	94	0	59	100	82	94	100	65	65	76	61
TOTAL (%)		74	35	53	1	59	82	29	94	50	0	76	59	94	0	59	100	82	47	50	65	65	38	55

0: missing data
1: data available

The quality is being checked by looking at the coverage rate of the data collected. This ratio informs about the percentage of the sources of data available (data collected from companies) in respect to the total population (total number of companies).

Table 5.3: Percentage of the population sampled of the parameters requested

	2006			2007		
	Sample	Population	Coverage rate	Sample	Population	Coverage rate
Belgium						
Bulgaria						
Cyprus						
Denmark			Total			Total
Estonia						
Finland						
France						
Germany						
Greece						
Ireland						
Italy			10%			10%
Latvia						
Lithuania			30%[a]			33%[a]
Malta						
Netherlands	52	112	46%	46	124	37%
Poland			Voluntary/Total			
Portugal			41%			53%
Romania						
Slovenia				12	12	100%[b]
Spain						
Sweden			Census/Total			Census/Total
United Kingdom						11-23%
Total (%)						

[a] The number of companies and the employment had a 100% coverage rate.

[b] For income per product, raw materials and prices, the coverage rate was 50% (6 out of 12).

During the meeting, only this data was provided, so there is the need of further checks with other sources.

6. National chapters

6.1. Belgium

Overview of the sector

The Belgium processing industry in 2007 generated a total income of about 400 million Euros. While, in 2006 the total income was almost 200 million Euros. Employment in 2007 was also higher, 993 FTE in 2007 compared to 443 in 2006.

Data are available about the volume and value of final products in 2007. In this year a total volume of more than 32 000 tonnes was produced with a total value of 215 million Euros.

Table 6.1.1: Volume and value of final products in 2007

Main products	**2007**	**2007**
	volume (tn)	**Value ('000 €)**
Frozen fish products	8 044	59 242
Shellfish	7 812	38 695
Fresh fish products	6 101	56 800
Other products	10 684	60 756
Total	32 641	215 493

Fisheries products from Belgian origin only account for the 10% of the raw materials for the Belgian processing industry. 40% come from other EU countries and 26% from non EU countries. The remaining 25% comes from aquaculture, again mainly from EU and non EU countries.

Economic performance and competitiveness:

Numbers show an important increase in the Belgian processing industry between 2006 and 2007. That in the case that numbers were correct, the numbers of employment and turnover would have increased by a 124% and a 107%; in a context of negative profits (losses) and decreases in the productivity.

Table 6.1.2: Economic performance and competitiveness indicators in 2006-2007

Indicator	**2007**	**Variation from 2006**
Structural indicators		
No of firms	n.a.	n.a.
Employment	993	124%
Performance indicators		
Turnover * (‘000 €)	400 426	107%
GVA (‘000 €)	84 668	49%
GCF (‘000 €)	51 636	12%
Net profit (‘000 €)	35 828	-16%
Return on Investment (%)	12	-39
Financial position (%)	n.a	n.a.
Productivity indicators		
Income per FTE (‘000 €)	403	-8%
Net profit per FTE (‘000 €)	36	-63%
Running cost to turnover ratio in %	87	11

* Income is turnover and other incomes (subsidies and taxes are excluded)

6.2. Bulgaria

Overview of the sector

The seafood processing industry in Bulgaria consisted of 26 firms and generated a total income of about 23 million Euros in 2007.

Table 6.2.1: Main products

Main products	2006	2007	2006	2007
	Volume (tn)	Volume (tn)	Value (‘000€)	Value (‘000€)
Total fresh chilled	188	126	483	300
Total frozen	2 852	4 108	4 496	6 610
Salomns and trouts smoked	173	40	1 248	381
prepared food and tinned fish from mackerel	2 137	2 101	4 130	4 546
Total prepared food and tinned fish	3 159	3 396	6 488	6 941
Crayfish, mussels and other aquatic invertebrates prepared or tinned	1256	4 978	1 334	4 385
Total	8 763	10 309	21 893	22 752

Economic performance and competitiveness:

Table 6.2.2: Economic performance and competitiveness indicators in 2006-2007

Indicator	2007	Variation from 2006
Structural indicators		
No of firms	26.	0
Employment	n.a.	
Performance indicators		
Turnover (‘000 €)	22 752	3.9%
GVA (´000 €)	n.a.	
GCF (´000 €)	n.a.	
Net profit (´000 €)	n.a.	
Return on Investment	n.a.	
Financial position	n.a.	
Productivity indicators		
Turnover per employee (´000 €)	n.a.	
Net profit per FTE (or employee)	n.a.	
Running cost to turnover ratio in %	n.a.	

6.3. Cyprus

Overview of the sector

There were 25 processing industries in Cyprus in 2007. The turnover in 2007 was 12 263 thousand Cyprus pounds (around 20-21 million Euros). Even it seems that the industry is making profits (it lacks information on the fixed costs), the economic performance has worsened from 2006.

Table 6.3.1: Raw material

Main raw materials	**2006**	**2007**
	Volume (tn)	**Volume (tn)**
Total	215.508	251.401

Economic performance and competitiveness

Table 6.3.2: Economic performance and competitiveness indicators in 2006-2007

Indicator	2007	2006/2007
Structural indicators		
No of firms	25	0%
FTE		
Performance indicators		
Turnover (´000 Cyprus pounds)	12263	-11.0%
GVA (´000 Cyprus pounds)	3327	-56.3%
GCF (´000 Cyprus pounds)	3188	-57.7%
Net profit (´000 €)		
Return on Investment (in %)		
Financial position* (in %)		
Productivity indicators		
Turnover per FTE (´000 €)		
Net profit per FTE (´000 €)		
Running cost to turnover ratio in %	74.0%	+28.7

*Financial position is calculated as Own capital/Total liabilities.

6.4. Denmark

Overview of the sector

Size of the industry

The structural development in the fish processing industry is characterised by a decline in the number of work places from 254 in 1995 to 150 in 2007. The number of full-time employees fell in the same period from 6 822 to 4 428. The average size of the workplace measured by the number of full-time employees rose, however, from 27 to 29 employees per place of employment. The Danish fish processing industry is dominated of small and middle sized firms.

In 2007 there were 128 firms in the Danish fish processing industry. This was an increase from 2006 of 4 firms corresponding to a 3 % increase. The turnover decreased in the same period with 8% from a turnover of 2.1 billion Euros to a turnover of 1.9 billion Euros in 2007. At the same time the output in terms of commodities from the industry (processed raw material) decreased with 14% from 323 thousand tonnes to 368 thousand tonnes. The Danish fish processing sector employed in total 4 428 full-time employees in 2007. The employment in 2006 was almost the same with 4 414 FTE.

Nature of the industry: concentration

The Danish fish processing industry is mainly located around the most important harbours in Denmark. The most important areas in terms value and volume of landings are the north and western parts of Jutland and some of the largest concentration of processing industry are located in these areas. Furthermore some of the Danish islands are more depend of the local fisheries and industry, like Bornholm, because of the jobs that the industry creates.

Main products – main segments

Main market segments

Denmark is one of the world largest importer and exporter of fish and fish products. The Danish industry produces a large variety of different products based on many different species.

The raw material in the Danish processing industry is measured as output from the industry and not the raw material going in to the industry, nevertheless; the output data give a good overview of the species used and there importance for the industry.

The most important species for consumption in terms of volume is herring (33%) followed by cod (20%) and Salmon (10%). In terms of value the most important species is cod (24%), salmon (22%) and herring (14%). Production of herring and cod was falling in both value and volume between 2006 and 2007 and the production of salmon was increasing.

Fish for reduction is an important industry for Denmark. In 2007 fish for reduction make up for 63% of the total Danish catch and 32% of the total value. The value and volume for fish for reduction was falling between 2006 and 2007.

Table 6.4.1: Raw materials as output

Main raw materials	2006	2007	2006	2007
	Volume (tn)	Volume (tn)	Value (‘000€)	Value (‘000€)
Herring	71 521	60 817	124 462	113 575
Cod	41 446	37 103	200 134	192 742
Salmon	16 735	17 958	163 038	176 210
Others	93 416	70 517	390 591	336 828
Total for consumption	223 118	186 395	878 360	819 220
Fish for reduction	409 281	314 739	323 925	262 366
Total	632 399	501 134	1 202 285	1 081 720

In terms of degree of processing the most important group of products for consumption are prepared and preserved products with 65% of the volume of processed products. Fresh fillet makes up for 15%, while smoked, salted and dried cover 13%, and frozen fillet 7%. In terms of value prepared and preserved products are also the most important with share of 59% while smoked products cover 26% of production value. Fresh and frozen fillet make up for 11 and 5 %, respectively.

Taking fish for reduction into account fish meal and fish oil accounts for 63% of the total volume and 32 % of total value.

Table 6.4.2: Main products

Main products	2006	2007	2006	2007
	Volume (tn)	Volume (tn)	Value (‘000€)	Value (‘000€)
Fresh fillet	52 581	28 615	120 027	87 366
Frozen fillet	14 126	12 218	44 355	39 113
Smoked	26 367	24 707	205 108	209 274
Prepared and preserved	130 044	120 855	508 871	483 468
Total for consumption	223 118	186 395	878 360	819 220
Fish meal fish oil	409 281	314 739	323 925	262 366
Total	632 399	501 134	1 202 285	1 081 720

The Danish fish processing industry can be divided into segments based on the Commodity Trade Statistics collected by Statistics Denmark. The Danish segmentation is based on the main species used in the Danish fish processing sector, which are:

- Cod and flatfish
- Herring and Mackerel (Prepared and preserved industry)
- Molluscs, Shrimps and Crustaceans
- Mixed production (mixed species)
- Salmonoids
- Fishmeal factories

The dependency on the selected species in each sub branches is high. Cod and flatfish correspond for 72% of the total amount produced in the subsector. Herring and mackerel 81%, Molluscs, Shrimp and Crustaceans 89%, Salmonoids 83% and fishmeal factories 100% fish for reduction.

The structure of the different sub branches are descript for 2007. The sub branch "Cod- and flatfish" was economically the most important in 2007 with a turnover off 0.55 billion Euro and 1 155 full-time employees. "Mixed production" was the second most important sub branch with 793 full-time employees and a turnover of 0.43 billion Euros. The sub branch "Molluscs, Shrimps and Crustaceans" was the smallest with a turnover of 0.11 billion Euros and 272 full-time employees. In between was the sub branch "Salmonoids" with a turnover of 0.34 billion Euros and 1,131 fulltime employees, "Fishmeal factories" with a turnover of 0.29 billion Euro and 345 full-time employees and "Herring and mackerel" with 0.23 billion Euros in turnover and 732 full-time employees.

The sub branches with the highest profitability was "Molluscs, Shrimps and Crustaceans" and "Salmonoids" with a profitability of 62 and 13% of the physical capital. The profitability was lowest in the sub branch "Cod- and flatfish" and "Mixed production" with a negative profitability of -19 and -1%, respectively. The profitability of the sub branches "Molluscs, Shrimps and Crustaceans" are relatively high, whereas the profitability in the sub branch "Cod- and flatfish" and "Mixed production" is low.

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

In general the Danish fish processing industry are not dependent on domestic catches. The fish market is a global market and raw material is traded from all over the world. Nevertheless, the catches of cod, herring and mackerel have some importance. The fish meal factories are the most dependent of domestic catches, but are they are also receiving raw material from other countries lying around Denmark, like Norway, Iceland, UK and Sweden.

The salmon industry using fresh products in production are for most part dependent of the aquaculture production in Norway and UK, but frozen raw material for production are imported from all over the world. The industry using fresh trout is for most part dependent on raw material from Norway and domestic production, but again frozen raw material are imported from all over the world.

The import to the Danish industry is dominated by Norway, because of the large amount of salmon going through Denmark to the European marked. Other major exporters to Denmark are Sweden, Holland and UK. Also the export is dominated by salmon that are exported to especially Germany and France.

Economic performance and competitiveness

All performance and productivity indicators for the Danish processing industry were declining from 2006 to 2007 except from the return of investment, which rose by 6%. The GVA and GCF decreased with 8 and 57% from 2006 to 2007, respectively. Turnover per FTE declined with 5% corresponding to a turnover per FTE of 436 in 2007. Net profit per FTE was negative in both 2006 and 2007, and declining from -3 million Euros in 2006 to -7 million Euros in 2007.

Table 6.4.3: Economic performance and competitiveness indicators in 2006-2007

Indicator	2007	Variation from 2006
Structural indicators		
No of firms	128	3%
FTE	4 428	0%
Performance indicators		
Turnover (´000 €)	1 946 599	-7%
GVA (´000 €)	222 550	-8%
GCF (´000 €)	19 469	-57%
Net profit (´000 €)	-30 883	-142%
Return on Investment (in %)	-49	6
Financial position* (in %)	20	-1
Productivity indicators		
Turnover per FTE (´000 €)	436	-5%
Net profit per FTE (´000 €)	-7	-141%
Running cost to turnover ratio in %	89	0**

*Financial position is calculated as Own capital/Total liabilities.

Future possible development

The number of processing plants has been increasing from 67 in 2007 to 68 in 2008. The production of fish for human consumption increased 18% in 2008 in relation to 2007. Production of fishmeal and oil are also increasing from 2007 to 2008 with 10%. In 2008, the production based on salmonoids, herring and mackerel rose in relation to 2007, whereas production based on all other species fell. Furthermore the production of fresh and frozen filet, smoked, prepared and preserved products increased. Sales prices and raw material prices were falling for most species, raw material prices however more than sales prices.

Profitability in the fish processing sector is expected to decline slightly in 2009 in most parts of the industry. Stable profitability is, however, is expected for fish meal factories and in the mackerel productions. These expectations are due to the financial crisis which causes declining demand for fish in Europe. In the traditional markets for fish species such as cod, flatfish and shrimp in Western Europe the demand are expected to fall due to declining purchasing power. In the more recently developed markets for cheaper species such as herring and mackerel in Russia and Eastern Europe the decline is due to the export enterprises problems with insurance against losses at export markets. The development must also be considered in conjunction with the expected price falls for most fish species, salmon excluded, as well as in conjunction with the expectation that there will be a significant increase in raw material supply of cod, mackerel and flatfish in 2009.

6.5. Estonia

Overview of the sector

Size of the industry

There were 57 fish processing enterprises in Estonia in 2007. The number of fish processing factories was almost stable over 2006-2007 years. The turnover of production was more than 104.2 million Euros in 2007. Comparing with 2006 the turnover decreased by 7 percent in 2007. The employment calculated in full time equivalent in the fish processing industry in 2007 decreased by 11% (from 2370 in 2006 to 2103 in 2007).

Nature of the industry: concentration

The location and historic background have formed the Estonian fish processing industry into what it is today. During the soviet period, the Estonian fish processing sector was a large and well-developed branch of the national economy which produced a variety of fish products for the entire Soviet Union. Since the main markets were geographically far away, it was necessary to concentrate on the products which had long shelf life: different types of fish preserves and conserves.

Directly after Estonia regained independence in 1991, the eastern countries (e.g. Russia, Ukraine) remained as main market areas for fish products and this situation still persists. However, due to economical or political contingencies in the eastern countries, many fishing and processing enterprises in Estonia, are not oriented exclusively towards the eastern markets any more but also have turned look to the western markets (e.g. Finland, Denmark, Sweden, Germany).

Main products – main segments

The main products in the Estonian fish processing industry in 2006 and 2007 were frozen fish, preserves and conserves. But also smoked fish, fish fillets and ready-made products were represented in assortment.

The volume of raw material used for processing and income of fish processing enterprises were decreasing during the year 2007. Occasion for this decreasing was political crisis (Bronze Night) between Estonia and Russia that involved substantial decline in the fish export capacity to Russia (from 16.8 million Euros in 2006 to 12.3 million Euros in 2007).

Table 6.5.1: Raw material

Raw material	2006	2007
	Volume (tn)	Volume (tn)
Total	85 000	75 000

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

Herring and sprat from the Baltic Sea are the most important local raw material for the Estonian fish processing enterprises. Fish is sold fresh or frozen (mostly to the eastern markets but occasionally also to western fish meal factories), or processed in Estonia before selling in the local market or abroad. Estonian coastal fishing provides reasonably large volumes of expensive freshwater fish like perch, pikeperch and pike which are used as raw material for fillets. Raw material for ready-made products are import origin mainly (e.g. ocean fish). In 2006-2007 fish was imported from 36 countries (e.g. main trade partners were Denmark, Finland, Sweden). Due to its small size, the fish markets and processing enterprises do not depend on domestic aquaculture production.

Economic performance and competitiveness

Table 6.5.2: Economic performance and competitiveness indicators in 2006-2007

Indicator	**2007**	**Variation from 2006**
Structural indicators		
No of firms	57	4 %
Employment in FTE	2 103	-11 %
Performance indicators		
Turnover (´000 €)	104 219	-7 %
GVA (´000 €)	23 756	22 %
GCF (´000 €)	6 291	53 %
Net profit (´000 €)	1 157	-894 in 2006
Return on Investment (in %)	3	212
Financial position (in %)	82	9
Productivity indicators		
Turnover per FTE (´000 €)	50	5 %
Net profit per FTE (´000 €)	0.6	-0.4 in 2006
Running cost to turnover ratio in %	94	-2

Regardless the decreases in turnover Estonian fish processing enterprises got profit in 2007. In 2006 the Estonian fish processing enterprises incurred losses near 900 thousand Euros and in 2007 they received the profit of more than 1 million Euros. Achievement of profit came from the reduction in running costs in 2007.

In spite of 11 % decrease in the employment in 2007, the labour costs were increasing 13 % during the same time. The reasons for these trends were on the one hand difficulties (political crisis) for fish processing enterprises oriented toward the Russian market, and on the other hand the continuous improvement in Estonian economy situation, which brought the rise in labour shortage, and entrepreneurs were compelled to offer more competitive incomes to prevent workers leaving.

Comments on data

The data of fish processing sector were not segmented. Unfortunately, we had some problems with getting of all needed data for 2006 and 2007 due to insufficient response rate; therefore we are able to provide text only with general overview in some points.

6.6. Finland

Overview of the sector

There were 147 fish processing firms in Finland in 2007. These firms produced 75 million kilograms of fish with a production value of 150 million Euros. The industry was highly concentrated in the sense that the 15 largest companies produced almost 80% of the total revenue generated b y the industry. Employment in fish processing decreased compared to the previous year. In 2007 the industry employed 387 FTEs, a decrease of 15% compared with 2006. The majority of the job losses occurred in the largest processors.

Table 6.6.1: Raw material

Main raw materials	2007
	Volume (tn)
Baltic herring	30 134
Rainbow trout	20 064
Salmon	13 998
Herring	4 962
European whitefish	2 245
Other	2 826
Total	74 229

Source FGFRI: Fish processing 2007. No data available on 2006.

Production (in terms of volume processed) increased steadily between 2003 and 2007. There was a growth in production of around 15% between 2005 and 2007. Of the main sources of raw material, 70% was domestic landing and aquaculture products. Farmed rainbow trout was the most important species in terms of value in 2007. Baltic herring was the most important species in terms of volume; 30 thousand tons was processed in 2007. The main market for Baltic herring is the Russian export market. One third of Finnish raw material is imported. Norwegian salmon was the most important imported species for processing in 2007. Together with rainbow trout they were the most important species in terms of value; production volumes for both species reached 34 thousand tons in 2007.

Economic performance and competitiveness

The total revenue of the Finnish processing industry was 150 million Euros in 2007, an increase of 12% compared to the previous year. Despite this increase, gross value added remained stable at 29 million Euros while profitability deteriorated. Gross cash flow decreased by one third and net profit deteriorated to zero. The financial position of the processing firms also declined. The solvency ratio dropped to 23% in 2007 which can be considered as relatively mediocre.

Increasing costs have deteriorated profitability. Total production costs (excluding capital costs) were high in 2007 at around 96% of income. Raw material was the major cost item; they accounted for over half of total production costs.

Despite an increase in the number of firms, employment decreased. In particular, large companies reduced employment significantly. This increased the productivity of labour in terms of production but not in terms of profitability.

Table 6.6.2: Economic performance and competitiveness indicators in 2006-2007

Indicator	**2007**	**Variation from 2006**
Structural indicators		
No. of firms	147	17 %
Employment	387	-15 %
Performance indicators		
Turnover (´000 €)	149 800	12 %
GVA (´000 €)	28 700	0 %
GCF (´000 €)	6 300	-31 %
Net profit (´000 €)	0,0	-100 %[1]
Return on Investment (in %)	0	0
Financial position (in %)[2]	23	-11
Productivity indicators		
Turnover per FTE (´000 €)	387	31 %
Net profit per FTE (´000 €)	0,0	-100 %
Production cost to income ratio in %	96	3

[1] Net profit was 4.3 million Euros in 2006 [2] Solvency ratio

According to a recent survey (Fishery barometer 2009; http://www.rktl.fi/en/julkaisut/j/465.html) the profitability of the large companies improved in 2008. Other companies presumed that economic circumstances remained unchanged.

Comment on data

The economic data is compiled by combining data from Statistics Finland (SF) and Finnish Game and Fisheries Research Institute. Economic data is based on financial statements in SF. FGFRI carried out a survey on fish production. Financial data covers all firms in the industry. The production survey is carried out as a stratified survey. The target population include firms whose main activity is not fish processing.

6.7. France

Overview of the sector

Economic performance and competitiveness:

Table 6.7.1: Economic performance and competitiveness indicators in 2006-2007

Indicator	2007	Variation from 2006
Structural indicators		
No of firms	n.a.	
Employment	23 240	-2%
Performance indicators		
Turnover (‘000 €)	4 345 955	-1%
GVA (´000 €)	n.a.	
GCF (´000 €)	n.a.	
Net profit (´000 €)	n.a.	
Return on Investment (in %)	n.a.	
Financial position (in %)	117	6
Productivity indicators		
Turnover per employee (´000 €)	187 003	2%
Net profit per FTE (or employee) (´000 €)	n.a.	
Running cost to turnover ratio in %	n.a.	

6.8. Germany

Overview of the sector

The German Fish Processing Sector contains of 293 enterprises (as of 31/12/2007). The turnover is 2 301 246 000 Euro and total employment is 8 237 persons. The sector is, compared with the size of the German fishing fleet to other EU fleets, in an EU wide comparison quite large. This is due to historical reasons and the size of the German market. Germany has the world´s largest fish finger factory. The sector is characterized by a continuous decline of employees and a year to year increase in sales. In 2004 the employment in enterprises with 10 and more employees was around 9 000 persons and the sales amounted to 1.7 Billion Euro, compared to around 7 800 employees and 2.3 Billion Euros sales in 2007.

Nature of the industry: concentration

From the sectors 293 enterprises 208 have 0-10 employees. This part of the whole sector stands for only 5.25 % of the whole sector sales and 4.8 % of the whole sectors employment. The 31enterprises with 50 and more employees contribute 84 % of the sectors turnover and 78% of all employees are employed in this size segment.

In terms of employment more than one quarter of the industry is located at Bremerhaven, the largest city at the German North Sea Coast. In the whole fishery sector, 4 000 persons are directly employed in this sector at Bremerhaven, which is one of Europe´s leading centres for fish processing and frozen food products. Around one eights of the sectors employment is located at Cuxhaven.

Main products – main segments

Main market segments

The main products are fish fingers and breaded fish fillets. The production value ex works of this category in 2007 was 469 951 000 Euro. Processed herrings had a production value ex works of 257 098 000 Euro, frozen fish fillets amounted to 160 800 000 Euro, fish salad to 122 617 000 and the production value of smoked salmon in 2007 was 111 621 000.

Table 6.8.1: Main Products (Volume and Value)

Main products	2006	2007	2006	2007
	Volume (tn)	Volume (tn)	Value (‘000 €)	Value (‘000 €)
Fish Finger and breaded fish fillet	154 852	174 409	410 665	469 951
Herring processed and/or preserved	77 117	83 612	224 712	257 098
Frozen fish fillet	58 549	57 199	160 681	160 800
Total	473 361	472 600	1 657 175	1 711 299

Specific data for the raw material per species only for the processing sector are not available in a sufficient quality. For the whole German fish and sea food consumption of 1.3 Million tonnes (i.e. 16.4 kg per capita) the main species are Alaska Pollack with 23.6%, Herring with 16.1% and Salmon with 11% in terms of catch volume.

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

The German fish processing sector as the whole fish sector does not rely very much on domestic products or landings. Only 15% (2007) of the total German fish market is covered by domestic or foreign landings of the German fleet, imports stand for 85% of the total fish market in terms of volume (incl. export). In terms of import value Poland - with a share of 11.2% - was the largest foreign supplier, followed by China (10.3%), Denmark (10.1), Netherlands (9.0%) and Norway (8.7%).

The main species for the processing industry are the white fish species, followed by Alaska-Pollack and herring.

Economic performance and competitiveness:

Table 6.8.2: Economic performance and competitiveness indicators in 2006-2007 1)

Indicator	2007	Variation from 2006
Structural indicators		
No of firms (10 and more employees)	85	
Employment	7 816	-7%
Performance indicators		
Turnover (‘000 €)	2 301 246	13%(#)
GVA (´000 €)	386 612	6%
GCF (´000 €)	125 122	39%
Net profit (´000 €)	24 809	Losses in 2006
Return on Investment (in %)	n.a.	
Financial position (in %)	48	2
Productivity indicators		
Turnover per employee (´000 €)	294 427	17%
Net profit per FTE (or employee) (´000 €)	3174	Losses in 2006
Running cost to turnover ratio in %	85	-15

1) Unless otherwise indicated, data are related to enterprises with 20 and more employees

#) numbers are not comparable due to the change in threshold of statistics from 10 to 20 employees.

2) Net Profit for Germany does not include indirect taxes, but subsidies.

After overall losses in the sector in 2006, the German Fish processing industry gained net profit in 2007 again. Nevertheless, in terms of return of sales it only amounts to 1.08%.

Comment on sector´s performance and possible development in the future:

Since the German retail sector is dominated by large companies, the German fish processing industry is not able to pass higher prices of raw material or input factors like energy easily to the retail companies. This is reflected by the producer price index in comparison to the retail price index.

Table 6.8.3: Retail and Production Price Index

	2003	2004	2005	2006	2007
Retail price index fish and fish products	113	113	115	121	125
Production price index fish processing industry	123	115	114	119	119

The profit of the sector is under high pressure from the retail sector as well as from competitors especially in Poland and other new Baltic EU-countries. This extended in former years to the movement of processing enterprises from Germany to these new EU-countries, financed by subsidies from the European Union.

Moreover primary processing of raw material fishery products has continued to increase in third countries (non EU), supplying semi-prepared products for the European added value processing industry.

Comment on data

Since for statistical purposes the population is stratified, some data are only available for enterprises with 10 and more, resp. 20 and more employees. In 2007 a change in the stratification took place, so some data are only available from 20 and more employees upwards.

6.9. Greece

Overview of the sector

About 160 enterprises in Greece were involved in the processing sector of fisheries products in 2007. These enterprises are located either in areas with traditionally processing activities (Northern Greece) or in big landing sites and consumer centers (Athens, Thessaloniki, Kavala). The majority of plants are classified as small industry ones, therefore engages small number of employees.

The number of employees is used to classify enterprises[2]. The majority of them are classified as small industry ones.

Table 6.9.1: Size of processing companies in Greece according to their personnel in 2006[3]

Personnel	Number of companies
1-10	65
11-49	43
50-249	8
250 and more	1
Total	**117**

Frozen products are the primary presentation of the raw material due to the long conservative live of the product. 67% of all raw materials are frozen, 27% are fresh and 5% are fillets. The fresh fish is originated mainly from local landings.

First provider of the Greek processing industry for 2006 is Community market (EU-25). However, due to the globalization of the markets and the variety of products, all markets contribute considerable amounts of raw material. 27% of the raw material comes from Greece, 10% from the rest of the EU, 19% from Africa, 8% from America, 7% from Asia, 7% from the rest of Europe, etc.

On next table it can be seen the main species used as raw materials in volume.

Table 6.9.2: Raw material in volume (tonnes)

Main Raw materials	2006	2007
	Volume (tn)	Volume (tn)
Sardine	n.a.	4 176
Anchovy	7 819	4 687
Hake	5 118	4 204
Squid	9 487	9 730
Octopus	10 129	6 633
Total	**85 320**	**58 265**

[2] For the calculation of employing equivalent, part time employees are assumed to be occupied four months per year in the sector.
[3] Data was collected over 117 enterprises.

The most significant part of the processing production is directed into the local market (79%). An important part is consumed in the rest of the European Union (16%), while a small percentage is addresses to some 3rd countries[4].

Table 6.9.3: Production of the processing sector in Greece according for 2006

Main products	**2006**	**2006**
	Volume (tn)	**Value ('000€)**
Salted	4 614	17 990
Canned	5 531	22 855
Smoked	1 252	9 396
Fillets	5 799	36 563
Fish preparations	269	1 045
Fresh	246	2 233
Frozen	62 348	272 817
Shell removal	684	2 868
Total	**80 743**	**365 768**

Economic performance and competitiveness:

Table 6.9.4: Economic performance and competitiveness indicators in 2006-2007

Indicator	**2007**	**Variation from 2006**
Structural indicators		
No of firms	160	18.5%
Employment (total)	2175	-10.2%
Performance indicators		
Turnover ('000 €)	186 719	-49.0%
GVA ('000 €)		
GCF ('000 €)		
Net profit ('000 €)		
Return on Investment (%)		
Financial position (%)	44	
Productivity indicators		
Turnover per employee ('000 €)	86	-43.2%
Net profit per employee ('000 €)		
Running cost to turnover ratio in %		

[4] Not all companies reported the destination of their product.

6.10. Italy

Overview of the sector

Size of the industry

At the end of 2007 the number of fish processing enterprises (preserved, frozen, chilled fish product and preparation of fish meals) registered in Italy was 376 (the data collection programme excludes enterprises managed on a personal basis). The number of people employed was about 7 750 persons. The turnover of the sector was, in 2007, more or less 3 100 million Euro while the raw materials processed were about 490 thousand tonnes.

Nature of the industry: concentration

53% of the fish processing enterprises are located in the southern Italy and in the islands, 20% in the Northeast, 18% in the central regions and only 8% in the Northwest.

Indeed, the regions with the largest number of companies are Sicily (17%), Veneto (12%) and Campania (10%). The largest number of employees is found, however, in the North-East, that, from a general economic point of view, is the most productive and developed Italian area. While on average the number of employees per fish processing enterprise is 21, in the north-eastern regions, as Friuli V. G. and Veneto, the number of employees per company is respectively, 38 and 30 units.

As far as the dimensional level, 52% are companies with up to a maximum of 10 employees (micro enterprises) while 92% is made up of small business (less than 50 employees, the sum of the classes <10 and 11-50).

The classification of enterprises by legal status (the main legal forms were considered) shows a preponderance of a Ltd. from (74%) due to the prevalence of the small and medium enterprises.

Main products – main segments

Main market segments

The Italian fish processing sector is represented by two main segments: the canning sector (mainly tuna, sardine and anchovies) and the freezing sector. Before going deeper in the analysis, however, it is necessary to outline that most of the firms that declare, as their main economic activity, “freezing and/or chilling” actually:

a) produce frozen or chilled fish products but also provide marketing services as they sell, mainly to the large distribution channel, both their own and also external products;

b) do not make any processing activity: they just buy (mainly from abroad) frozen and chilled fish or fish products and re-sell on the national market;

b) they just store fish products;

c) they make a small processing, e.g. buy frozen fish fillets and make just packaging activities.

This creates big confusion from a data collection point of view in the sense that the dimension of the fish processing sector (meant just as adding a value to the raw material through processing) is probably overestimated (as data can include also commercial activities).

The canning sector can be considered the main segment of the Italian fish processing industry, mainly tuna preserved in oil and anchovies, salted or preserved in oil. In 2007 the tuna canning sector had a production of 86 thousand tonnes with a value of about 1 billion Euros.

As far as the main species processed (by the overall sector: canning, freezing sectors as well as by firms preparing fish meals), the total volume was equal, in 2007, to about 491 thousand tons. The most important species, in volume terms, were anchovies (28% of the total), followed by yellowfin tuna (21%). Other fish represented 14% of the total, while cuttlefish, mussels and clams represented, respectively, 9% and 6%.

Table 6.10.1: Raw material

Main raw materials	**2007**
	Volume (tn)
Anchovies	135 317
Crustaceans	12 699
Cuttlefish	43 633
Eel	804
Other fish	68 605
Hake	9 185
Other molluscs	40 317
Mussel	28 997
Squilla mantis	193
Pilchards	12 988
Clams	27 924
Swordfish	1 160
Trout	7 626
Yellowfin tuna	101 921
Total	**491 369**

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

The Italian fish processing sector largely depends on imports, especially the canning industry, mostly represented by the tuna canning sector.

In recent years, the increase of the production costs, primarily due to the decrease of tuna catches, has led the Italian companies, totally depending from abroad for the supply of raw materials, to change their production and marketing strategies.

On one hand, imports of frozen, fresh and refrigerated tuna (mostly from Spain) is again increasing at the expense of the semi-manufactured tuna loins (mostly imported from

Ecuador, Colombia and ACP countries), more expensive than the first; secondly, the need to reduce costs has led several companies to relocate production in areas closer to fishing grounds and where the labour cost is lower. On the same time, some Italian brands of canned tuna have been acquired by foreign companies, especially Spanish. This means that Italy imports from Spain finished products (in 2007 50% of the overall production) and only distribute them on the market.

Economic performance and competitiveness:

Table 6.10.2: Economic performance and competitiveness indicators in 2006-2007

Indicator	2007	Variation from 2006
Structural indicators		
No of firms	376	
Employment (total)	7 750	
Performance indicators		
Turnover (‘000 €)	3 152 922	+1%
GVA (‘000 €)	358 188	+10%
GCF (‘000 €)	123 114	+24%
Net profit (‘000 €)	62 273	+75%
Return on Investment (%)	3	+1
Financial position (%)	27	+1
Productivity indicators		
Turnover per employee (‘000 €)	407	+1%
Net profit per employee (‘000 €)	8	+75%
Running cost to turnover ratio in %	96	-1

The value of the turnover of the sector was equal, in 2007, to 3 100 million Euro, showing an increase of +1% since the previous year 2006. This is essentially due to the rising trend of the producer prices of industrial processing and preserving of fish and fish products.

As far as operational costs (excluding the labour costs) just a small increase of +0.22% is registered from 2006 and 2007. However some differences can be noted among the different type of costs: a stability for the raw materials costs and an increase (of about +3%) for the energy costs.

As far as the canning sector, the rising cost of a very important raw material for the sector, olive oil, which, unlike other countries is mostly used in Italy for canned tuna, has damaged the sector in the most recent years. This increase, that amounted, in the period 2002-2006, to more than 11% (Databank, 2008), is partly due to the entry into force, in 2004, of EC Regulation 865 of the Council which abolished, with effect from November 2005, the refund for olive oil used in the manufacture of preserved fish and vegetables products. Rising trend over the period 2002-2006 is also registered in the cost of other raw materials, crucial for the canning industry as tinplate (+10%) and glass (+1.6%) and for items such as transport (+2.8 %) and electricity (+6.9%).

The GVA was equal, in 2007, to 358 million Euros, showing an increase of +10% since 2006.

As far as the labour costs it was equal, in 2007, to 235 million Euros, increasing of about +3% since 2006. The labour cost/employee amounted to about 30 000 Euro. If making the analysis at geographical level a large heterogeneity can be found: the remuneration of the labour factor ranges from 24 000 Euro for people working in southern Italy fish processing enterprises to 41 thousand Euro for people working in the North-West of Italy.

On average the overall running costs amounted, in 2007, to 96% of the turnover (-1% since 2006).

The economic result of the sector was positive, as the net profit (earnings before interests and taxes) was equal to 62 million Euros.

The value of the ROI (return on investments) is equal, in 2007, to 3%, meaning that on 100 Euro invested in the sector a net profit of 3 Euro can be gained through the productive process.

The analysis of the productivity indicators shows that the turnover per employee for the Italian fish processing sector is 407 thousand Euros (+1% since 2006). Again, if looking at the different geographical areas great differences can be found: a maximum value of the turnover per employee of 794 thousand Euros for the North-East enterprises and a minimum value of 236 thousand Euros for the southern factories.

As far as the financial indicators, the total invested capital (total value of assets) in the sector was equal, in 2007, to 2 000 million Euro (increase of +6% since 2006). However the sector does not show a very good performance in terms of financial position (ratio between equity and the borrowed capital). This value is equal, in 2007, to 27%, representative of a situation of under-investment and strong use of borrowed capital.

Comments on data

It should be stressed that the way enterprises submit data for statistical and fiscal purposes does not easily allow to make a clear distinction between different types of processing. In particular, in specifying the type of economic activity (NACE classification) firms very often report only the main activity 15.2 (e.g. “processing and preserving of fish and fish products”) without going in details (15.2.1 or 15.2.2, respectively “preserving of fish and shellfish by freezing, salting, etc.” and “preparation and canning of products and canned fish, crustaceans and molluscs”). This does not allow a collection and hence an analysis by type of processing but only at dimensional or geographical level.

Another important issue for the Italian fish processing sector (but also for most of the Mediterranean countries) is the high dependence from raw material imported from abroad (very often from non EU countries). Bearing this in mind, if the main purpose of the DCR (now DCF) is to collect data on the fish processing sector in order to see how the fish processing sector is impacted by the fish catching sector (e.g. how the decrease in fish stocks and the increasing catch restrictions impact the fish processing production and performance) and *vice-versa* (e.g. if the increasing demand for fish processed products can exert a pressure on the stocks, via the catching sector), hence the data collection for the Italian fish processing

sector has little significance and utility. Data could only be used to have an idea of the dimension of the sector and to carry out sectoral analysis.

6.11. Latvia

Overview of the sector

Size of the industry

The number of fish processing factories has insignificantly decreased from 116 in 2006 to 107 in 2007. The number of full time employees also decreased from 7353 to 5648 in the same period. The Latvian fish processing industry is dominated of small and middle size firms.

The total volume of the fish production has reduced about 8 tones in 2007 compared to the year 2006 and composed about 170 thousand tones. The most profitable production type was "prepared and canned fish" which bring revenue about 88 in 2006 and 86 million EUR in 2007.

Nature of the industry: concentration

The most Latvian fish processing enterprises are located in Tukums area. Some number of small fish processing firms is situated near the fishermen settlements.

Main products – main segments

The total value of row material for processing industry was almost stable over the year 2006-2007 and was about of 141 million EUR (82 % of total population). The total value of the main types of fish products has reduced from 141.7 million EUR in 2006 to 127 million EUR in 2007.

"Prepared and canned fish" was the most important product with share of 68 percent of total value in 2007. The "fresh and frozen fish fillets" and "dried, salted or smoked fish" shares were about 10 percent.

Table 6.11.1: Main products

Main products	2006		2007	
	Volume (tn)	Value ('000 €)	Volume (tn)	Value ('000 €)
Fresh and cilled fish	9 321	39 239	8 738	36 676
Frozen fish	17 778	58 443	6 456	60 271
Freh and frozen fillets	14 362	3 820	12 679	3 923
Dried, salted or in brine, smoked fish	11 722	7 503	12 876	6 168
Prepared and canned fish	88 480	68 897	86 278	62 686
Total	**141 662**	**177 902**	**127 027**	**169 724**

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

"Prepared and canned fish" cover 62 percent of total value of fish products export. The main important trade partners for this product type are USA, Russia and Estonia. "Fresh and chilled fish" makes up for 13 percent, while "Fresh and frozen fillets", "frozen fish" and "dried, salted and smoked fish" cover 10, 9 and 3 percent respectively. For these fish products the main trade partners are Lithuania, Estonia, Belarus, Denmark and France.

Latvia imports fish products mainly from 20 countries. The largest imports are recorded from Sweden, Lithuania and Norway. The most important fish products are frozen and chilled fish, which value is about 53 percent of total import.

Totally, foreign trade balance in 2007 was dominated of fish products export of about 42 million EUR. Total value of Latvian fish products export was 120 million EUR.

Economic performance and competitiveness:

Table 6.11.2: Economic performance and competitiveness indicators in 2006-2007

Indicator	2007	Variation from 2006
Structural indicators		
No of firms	107	1%
Employment (total)	5 648	2%
Performance indicators		
Income* ('000 €)	167 935	0.1%
GVA ('000 €)	19 861	0.3%
GCF ('000 €)	n.a.	
Net profit ('000 €)	n.a.	
Return on Investment (%)	n.a.	
Financial position (%)	50	95
Productivity indicators		
Income per employee ('000 €)	30	75
Net profit per employee ('000 €)	n.a.	
Running cost to turnover ratio in %	103	1

* Income = Turnover

Economic indicators for the Latvian fish processing industry were collected for the first time. The information was collected by the method of questionnaire by the Central Statistic Bureau of Latvia. The number of firms covered 82 percent of total number of fish processing enterprises.

Economic indicators calculated *by the formulas ordered of the Commission Regulation (EC) N 2007/98* showed unrealistic values for Net Profit and some others indicators. These variables do not reflect the real economic situation in the fish processing industry and cannot be used for the economic analyses.

There is no doubt that the main reason for these difficulties is the methodological inconsistency of primary data collection and processing. It is expected that the system of economic data collection should be develop and improve.

6.12. Lithuania

Overview of the sector

Size of the industry

There were 36 fish processing enterprises registered in Lithuania in 2007. The number of fish processing factories was almost stable over the years 2006-2007. The volume of the production was more than 81 thousand tons of fish products, the turnover – EUR 177.5 million in 2007. Compared to the year 2006 the volume of the production and the turnover increased more than 20 percent (accordingly from 67.1 thousand tonnes and EUR 131.4 million). The employment calculated in full time equivalent in the fish processing industry in 2007 decreased by 3% (from 4 145 in 2006 to 4 041 in 2007), while number of persons employed decreased by 8% (from 5 034 in 2006 to 4 632 in 2007). That means that partial employment decreased and productivity of working power increased rapidly.

Nature of the industry: concentration

Main Lithuanian fish processing plants are concentrated near the port or main towns with a good infrastructure. More than one third of the fish processing plants (13 enterprises) are situated near the port of Klaipeda in Klaipeda district.

Lithuanian fish processing industry is characterised by a mix of companies, some with highly modern production facilities that deliver products of international quality for EU and Russian markets, while others are less technically sophisticated, mostly oriented to Lithuanian market.

Some small fish processing plants are owned by fishermen and process the caught fish. Most of the biggest plants do not have any capacity for fishery, their activities are specialized only on fish processing.

Main products – main segments

For the purpose of data collection and this analysis Lithuanian fish processing industry was segmented to a big and medium companies, with employment of over 50 persons and a small sized companies with employment of less than 50 persons. The segmentation was proposed in Lithuanian data collection programme and approved by SGRN.

There is a balance between the number of small and medium or big companies (by the number of employees 19 small and 17 medium sized or big companies in 2007). Almost all the companies are specialized to produce several groups of fish products; only few companies are specialized in the production of only one product. However the medium and big companies produced over 90% of volume and value of production in 2007.

It is quite complicated to segment the data of the raw material for processing by the fish species even if in Lithuania the assortment of species is less varied therefore simply the total volume of raw material is presented here.

Table 6.12.1: Raw material

Raw material	2006	2007
	Volume (tn)	Volume (tn)
Total	80 483	94 072

The raw material used for processing was increasing during the year 2007 by 17%.

Main products of Lithuanian fish processing industry in 2007 were aromatized sea products (surimi products); the production of these products covered 28.1% of income of fish processing industry. The frozen fish products covered 19.8%, smoked fish products – 17.9%, salted fish products – 15.7% of turnover of Lithuanian fish processing industry. The smallest group of products (excluding non alimentary products) of Lithuania fish processing industry is dried and withered fish products – 0.8% of turnover in 2007.

Table 6.12.2: Main products

Main products	2006	2007
	Value (‘000 €)	Value (‘000 €)
Aromatized sea products	1 909	49 851
Frozen fish products	48 711	35 219
Smoked fish products	27 914	31 748
Salted and soused fish products	26 894	27 857
Total industry production in 1000 €	131 353	177 516

Quite strange trend appears in the production of aromatized fish products which by value of production in 2007 were in the first place and in 2006 it was far from being amongst the most important products. This appearance may be caused by the lack of information in the sample of economic data, more over that the volume of production of aromatised products received from all the registered enterprises shows that these products are in the top of volumes processed since 2004.

The second and third groups of the main products are frozen fish, which accounted about 20% of value of production and smoked fish products – 18% of value. Salted and soused fish products are also very important for Lithuanian fish processing industry, because products of this category are quite demanded on the external market and are one of the important products for export. Salted and soused fish products accounted about 16% of total volume of production in 2007.

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

Lithuanian fish processing industry is dependent on the imported raw material because of small catching quotas in the Baltic Sea and poor assortment of domestic fish for processing.

Most of the fish caught by Lithuanian fishermen in Atlantic and Pacific Oceans is realized in the foreign markets, while only small part of it is used in Lithuanian fish processing plants. One of main domestic species – Baltic cod – is used for processing in small companies; other domestic species are used for impermanent processing. The fish originating from inland fishery is usually smoked or dried by fishermen or in the small processing plants, situated near the fishing areas. The main aquaculture fish species – carp – in general is sold alive.

Lithuania is importing mostly fish filet and other fish meat. Import of these products covered 40% of the total volume of imported fish in 2006 and 43% in 2007. Frozen fish is also imported intensively: 32% of the total volume of imported fish products in 2006 and 30% in 2007. The import of prepared fish products (CN codes 1604-1605 under the combined nomenclature) covers only 12% of volume of imported fish and fish products. Most of imported fish is used for processing. Main species imported to Lithuania in 2006-2007 were Pacific salmons, herrings, sardines, mackerels, surimi for processing, and other species.

Main trade partners supplying fish for Lithuanian market (both for processing and for final consumption) in 2007 were Iceland (12.2 thousand tons or 13% of volume imported), Latvia (10.0 thousand tons or 11%), Netherlands (8.1 thousand tons or 9%), Norway (7.9 thousand tons or 9%), USA (6.3 thousand tons or 7%), Germany (5.0 thousand tons or 5%), China (4.6 thousand tons or 5%). The main suppliers of fish products in 2006 were almost the same as in 2007: Iceland, Norway, Latvia, Germany, USA, Estonia, and Spain. Other important partners exporting the fish products into Lithuanian market remain Ukraine, and Belarus.

Economic performance and competitiveness:

Table 6.12.3: Economic performance and competitiveness indicators in 2006-2007

Indicator	**2007**	**Variation from 2006**
Structural indicators		
No of firms	36	-3%
Employment in FTE	4 040	-3%
Performance indicators		
Turnover (‘000 €)	177 516	35%
GVA (‘000 €)	27 546	-19%
GCF (‘000 €)	5 539	-40%
Net profit (‘000 €)	-5 382	-42%
Return on Investment (in %)	-9	-6
Financial position (in %)	185	57
Productivity indicators		
Turnover per FTE (‘000 €)	44	39%
Net profit per FTE (‘000 €)	-1	-46%
Running cost to turnover ratio (in %)	97	4

The total volume of production of Lithuanian fish processing industry in 2007 was 81 463 tons. The production increased by 21% since 2006. The increase of the volume of raw material used for processing was 17 % at the same time.

Regardless of the increase of production and turnover Lithuanian fish processing enterprises incur losses. The loss in 2007 was EUR 5 382 thousand or 3% of total turnover. Comparing

with 2006 during the year it increased by 42 percent. However gross value added and gross cash flaw remained positive and accounted accordingly EUR 27.5 and 5.5 million.

Accordingly to the collected data from the enterprises the reason of the growing losses of fish processing industry could be explained by increase of raw material costs by 75%, which resulted increase of total production costs by 40% in 2007. While during the same period the labour, energy, packaging, and other costs decreased accordingly by 12%, 56% and 3%.

It is difficult to explain the immense increase of raw material costs. There is no straight link between this increase and the value of the imported raw material because during the same year the price per kilogram of imported products increased only by 4.3%. The increase in raw material costs could be mostly explained by increase of production and raw material use by 17 % and growing prices at the resale stage.

The fish processing sector could have higher losses than in 2006-2007 in the coming 2008-2009 years. The one presumptive reason of that would be the increase of interests paid for loans and further investment using credits in the processing and in business despite the fact that Lithuanian fish processing industry is already modern and higher quality oriented. Another reason would be the economic crisis, decrease of production volumes, deterioration of the production and product prices influenced by the decrease of consumption/demand.

There also could be important changes in the costs structure in the coming years. The significant increase of energy costs could appear due to the increase of fuel prices and the costs of energy in the other sectors. The costs of labor, packaging might be diminished on the ground of the economic crisis in case of necessity.

Regarding the raw material costs they have to decrease in the coming years, as the fish price felt down in the global market. The raw material cost covered 75 % of total running costs in 2007 and it was the only one cost item that was increasing. Raw material suppliers facing the subsequence of the global economic crisis and the decreasing demand of their products will probably decrease the prices of raw material for processing in 2008-2009. Otherwise there is a place for processing companies to use the substitutive and less expensive fish species for processing, to change the habitude of processing. In any case the processing industry will face the global economic crisis and the descending consumption and this industry would try to find the way to keep the stand in the market and keep the business running.

The data of 2006-2007 for the evaluation of fish processing sector was collected by Fisheries department under the Ministry of Agriculture of the Republic of Lithuania and the Lithuanian Institute of Agrarian Economics. The data on volume and value of production and on employment has been received from all the registered fish processing enterprises under the Order of the Minister of Agriculture on the statistical forms. The financial data has been collected using the questionnaires with the response rate of 30% in 2006 and 33% in 2007.

Taking into account the new DCF, statistical forms, which are approved by the Order of the Minister of Agriculture, has been elaborated and supplemented by economic and financial data from questionnaire.

It would be quite complicated to segment the data of the fish processing industry by fish species even if in Lithuania the assortment of species is not rich. The variation of products from one fish species would be illimitable and it would be difficult to compare the production costs and profitability. The production lines used in fish processing could usually be used for processing of different fish species, but for the same level of preparation. So it could be difficult to make a meaningless segmentation when companies can switch from one fish species to another during the year dependently on the fishing season and demand on the market. Lithuania already five years collects the data from fish processing industry on volume and value by processing method and this approach justified itself.

6.13. Netherlands

Overview of the sector

Size of the industry

In 2006 and 2007 the Dutch processing sector according to NACE code 10.2 consists of 112 and 124 companies respectively. Turnover in these years accounted for 799 million euro and 756 million euro while the level of employment was 3501 FTE in 2006 and 3120 FTE in 2007. The number of processing companies and wholesale together is about 300 companies. Activity and data of both sectors is often integrated. In 2005 these 300 companies had an estimated turnover of 2.7 billion euro. Another 0.9 billion euro in fish products was shipped through the Dutch main ports that year.

Nature of the industry: concentration

The Dutch processing sector is not very concentrated. In 2006 and 2007 more than 80% of the processing companies have less than 50 working persons. Most of the fish processing companies are situated near coastal harbours or the borders of the IJsselmeer. Shellfish production and processing is concentrated at Yerseke, Zeeland, in the most southwestern region of the Netherlands.

Nearly all relevant sectors have been facing difficulties with respect to their growth opportunities for a number of years already. Companies within these sectors have to deal with the unstable supply of raw materials from the North Sea and environmental restrictions. Structural growth on the basis of local supply is therefore impossible. The sector has partially adapted to this situation. Some companies have shifted their attention to imported species. Others have been focusing on international markets that offer better opportunities for products with added value by extending their marketing and quality policies, with regard to both the provision of raw materials and to their customers.

The internal market has grown significantly since 2000, with the supermarkets as emerging distribution channel. Dutch fish processing is gradually benefiting more and more from this new sales channel. The entrepreneurs in the processing industry see important threats in terms of the provision of raw material and new catch restrictions. Also the lack of concentration in the sector is seen as an important problem that causes price competition between all companies. As a result of this margins are under pressure.

Main products – main segments

Fish-processing in The Netherlands is primarily based on flatfish, herring, shrimps and shellfish (especially mussels). The Netherlands have a dominant position in the processing of flatfish and roundfish, which is concentrated around the city of Urk. The added value of the round fish and flatfish industry is quite low. The supply of raw materials and the pressure placed on the margins are seen as the main threats. About 85% of the processed roundfish and

flatfish in The Netherlands is exported. Italy, Germany, France, Spain and Belgium are the most important markets for roundfish and flatfish. The most important products are sole and plaice and other flatfish products, but also imported species are becoming a significant group of exported products.

The shellfish sector is the second most important sector within the Dutch fishing industry. The shellfish industry is mainly focusing on mussels (fresh and preserved) and oysters. Most of the shellfish processing companies are integrated with the supply sector and are concentrated around Yerseke. More than 60% of the shellfish sector's sales are to countries outside the Netherlands. Belgium and France are the most important export markets for mussel companies. The four largest mussel processing companies have a large market share of almost 60%. The shellfish sector is still able to realize added value products, mainly because marketing factors such as the image of mussels and oysters as a traditional and regional product.

Other important market segments are the processing of herring for Dutch consumption, the smoking of salmon and eel and the processing of shrimp.

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

The input for the processing industry in 2005 is based on about 250,000 tonnes of raw material (flatfish, herring, salmon, shrimp and mussels). The supply of raw materials was for many years seen as the main threat of flatfish industry, though the stocks seem to recover now. There has been a decrease in using raw material from the Dutch fleet (such as plaice). Reason for this is the availability of cheap alternatives from Asia like pangasius and yellowfin sole. Because of environmental regulations with respect to the fishing of mussel seed there is limited supply of mussels. Opportunities for growth therefore are small. The last few years mussel processing companies start to import raw material from Germany, Ireland and Chile. The smoking of salmon and processing of herring are depending on imports, while eel to large extent is based on domestic production. Shrimps are also based on domestic production but are often integrated with the importing of shrimps or prawns from Asia.

Economic performance and competitiveness:

Table 6.13.1: Economic performance and competitiveness indicators in 2006-2007

Indicator	**2007**	**Variation from 2006**
Structural indicators		
No of firms	124	11%
Employment	3 120	-11%
Performance indicators		
Income* (´000 €)	784 005	-4%
GVA (´000 €)	165 329	-6%
GCF (´000 €)	56 599	3%
Net profit (´000 €)	30 931	17%
Return on Investment (%)	2	0
Financial position (%)	59	-12
Productivity indicators		

Income per FTE (or employee) in 1000 €	251	7%
Net profit per FTE (or employee) in 1000 €	10	31%
Running cost to income ratio in %	93	-1

Data are based on figures of the Dutch statistical agency about the processing industry. In 2006 and 2007 samples of 52 and 46 companies were taken and aggregated to the total number of processing companies.

In the period 2003-2007 the number of companies has been fluctuating. This mainly has to do with the roundfish and flatfish industry. Access to this market segment is relatively easy and economies of scale are difficult to realize. Compared to other processing sectors, there is no process of consolidation in the roundfish and flatfish industry. Most of the loss in employment in 2007 also took place in this market segment as a result of further mechanization of the primary processing (filleting machines). In 2007 turnover decreased with just 5% while net profits decreased by more than 25%. A possible explanation for this could be lower margins in the roundfish and flatfish industry because of increased competition of imports from Asian countries.

6.14. Poland

Overview of the sector

Size of the industry:

In 2007 there were 169 firms in the Polish fish processing industry. This was an increase from 2006 of 40 firms corresponding to a 31 % increase. The turnover increased in the same period with 21% from a turnover of 1 051 billion Euros to a turnover of 1 276 billion Euros in 2007. At the same time the output in terms of commodities from the industry (processed raw material) increased with 14% from 323 thousand ton to 368 thousand ton. The Polish fish processing sector employed in total 14 149 full-time employees in 2007. The employment increased from 2006 to 2007 with 2 023 FTE corresponding to an increase of 17 %.

Main products – main segments

Important species in the Polish fish processing industry deducted from input of raw material in 2007 is: Herring (29%), Salmon (18%), Cod (11%), Sprat (10%) and Mackerel (9%). Raw material input from all of these species except cod increased from 2006 to 2007.

Table 6.14.1: Raw material

Main raw materials	2006	2007
	Volume (tn)	Volume (tn)
Herring	91 924	104 860
Salmon	52 737	65 015
Cod	44 349	40 264
Sprat	35 196	36 214
Total	322 866	367 804

Table 6.14.2: Main products

Main products	2006	2007
	Value (‘000 €)	Value (‘000 €)
smoked	313 848	417 363
frozen	214 495	218 304
marinated	175 664	190 517
canned	76 043	117 409
fresh & chiled	81 549	42 937
salted	31 342	39 270
other	44 229	83 261
Total	1 052 607	1 276 247

Economic performance and competitiveness:

Table 6.14.1: Economic performance and competitiveness indicators in 2006-2007

Indicator	**2007**	**Variation from 2006**
Structural indicators		
No of firms	169	31%
FTE	14 149	17%
Performance indicators		
Turnover* (´000 €)	1 276 247	21%
GVA (´000 €)	202 089	40%
GCF (´000 €)	81 492	40%
Net profit** (´000 €)	55 980	45%
Return on Investment (in %)	16	-3
Financial position (in %)	2	-10
Productivity indicators		
Turnover per FTE (´000 €)	7 551	-7%
Net profit per FTE (´000 €)	299	11%
Running cost to turnover ratio in %	84	-2**

* Turnover equals income included other income

** Net profit is equal to EBIT

Comment:

Since capital size is not present in the Polish data, profitability cannot be calculated.

6.15. Portugal

Overview of the sector

Size of the industry

Portugal is a country that consumes a large amount of fish *per capita*. With around 56kg/person/year, it is one of the biggest consumer in Europe, next to Iceland (and worldwide, after the leader Japan) and the highest in the EU. Still, there are very particular differences over the industry productive segments (subsectors).

The importance of fish industry is obvious.

First, because the cannery subsector is almost 100% depending of the national small pelagic suppliers (and close to zero in tuna), and this is one important export issue toward national food products. Second, the salted cod consumption is very high, and a great part of it is prepared in Portuguese factories. Finally, frozen and primary processing is another subsector that covers a major part of the fish and fish products for national demand and exports as well.

With 154 active processing companies, the production is over 150 000 ton per year, with a turnover of 1 300 million euro.

More than 6 300 people work directly at the plants, mostly women work force.

Nature of the industry: concentration

The nature of the Portuguese mainland coast was the origin of the coastal communities' settlement. This means that fishing communities are generally concentrated around urban areas, depending both on access to the sea and on shelter conditions (ports) and developing concentrated industries in their back.

This situation provided conditions for the concentration of the cannery industry next to the major national ports (the most frequent resource in Atlantic waters are the small pelagic, like sardine and horse-mackerel), and in time became one of the most important items for Portuguese exports.

There are 22 cannery factories in all, mainly around Matosinhos (North), in Algarve (South) and Peniche (Center).

Also the economic history is the back bone for one of the most important concentration on fish industry in national and international terms: the salting and drying cod is most concentrated near the almost only port for the external fleet (Aveiro), with 30 of the 46 of these factories (national wide) and more than 65% of production. The final product is mainly consumed by domestic market.

The fresh and frozen segment is mainly an importer of raw-material for supplying the domestic market. The 86 producing companies are spread around the urban metropolitan areas, in general not depending of the national fleet or aquaculture production.

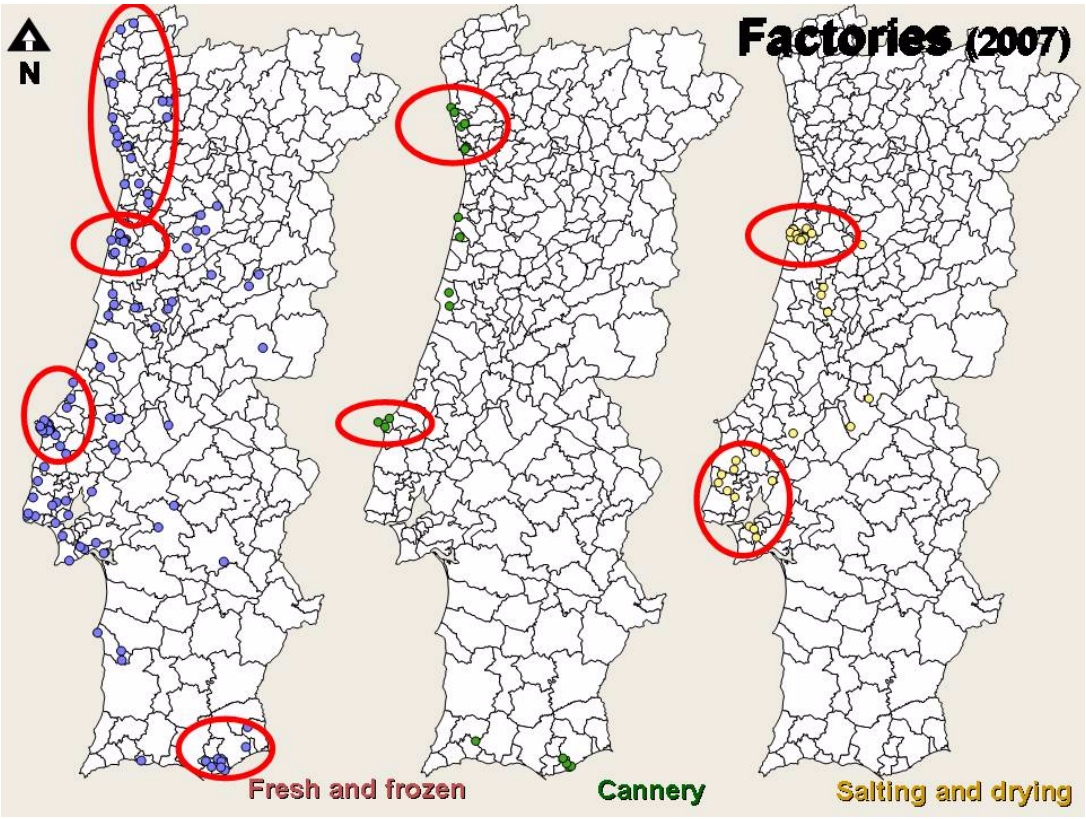


Figure 6.15.1: Establishment distribution, by segment (subsector)

Main products – main segments

a. Fresh (multi-species from the domestic fleet, and small pelagic from seine segment; bivalves, cephalopods)

b. Frozen (multi-species, from imports – Hake, sardine, redfish, cod, scabardfish, cephalopods, bivalves, crustaceans)

c. Cannery (small pelagic from local fleet and tuna from imports (90%) and local Azores fleet)

d. Salting and drying (cod and similar species, over 95% from imports).

It's not possible, at this time, to gather information on quantity and value per species. It is possible however to identify some of the most relevant products.

Table 6.15.1: Production by products and segment

Main products	2006	2007
	Volume (tn)	Volume (tn)
Dry salted cod	48 824	49 818
Sardine frozen	3 465	3 913
Sardine cannery	17 016	16 926
Tuna cannery	13 459	13 907
Red-fish fresh and frozen	4 629	5 586
Hake frozen	7 131	7 587
Total Frozen	82 998	86 533
Total Salted and Dried	55 472	60 070
Total Cannery	42 324	43 153
Total	**180 794**	**189 756**

Table 6.15.2: Sells by Industry, by products and segment

Main products	2006		2007	
	Volume (tn)	Value ('000 €)	Volume (tn)	Value ('000 €)
Dry salted cod	35 853	265 257	34 404	279 022
Sardine frozen	3 500	4 281	3 872	4 883
Sardine cannery	16 554	49 862	17 337	53 826
Tuna cannery	13 716	63 688	11 532	44 611
Red-fish fresh and frozen	4 545	12 746	5 371	12 816
Hake frozen	7 136	21 145	7 457	24 106
Total Frozen	67 278	254 996	69 569	263 260
Total Salted and Dried	41 973	291 552	42 291	313 393
Total Cannery	41 782	162 237	40 628	150 123
Total	**151 033**	**708 785**	**152 488**	**726 776**

Source: INE, 2009

The volume for different product of the same species is fundamental: cannot add tonnage of frozen sardine with tonnage of cannery sardine, for example.

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

Dependency: See above

Main trade:

Imports total connected products (2006): 391 530 ton; 1 272 476 m€

Imports total fish industry (2006): 66 473 ton; 168 307 m€

Main partners: UE (97% Fresh fish, 57% Frozen, 54% Salted), Spain (98% Fresh, 48% Frozen); Russia (16% Frozen); USA (13% Frozen), Denmark (19% Salted), Norway (14% Salted).

Exports total connected products (2006): 130 845 ton; 464 017 m€

Exports total fish industry (2006): 28 706 ton; 63 911 m€

Economic performance and competitiveness:

Table 6.15.3: Economic performance and competitiveness indicators in 2006-2007

Indicator	**2007**	**Variation from 2006**
Structural indicators		
Nº of firms	154	0%
Employment	6 301	0%
Performance indicators		
Production	152 488 t (INE)	+5%
Turnover (´000€) income	1 293 976	
GVA (´000€)	171 205	+ 4%
GCF (´000€)	99 248	+ 7%
Net profit (´000€)	70 650	+ 16%
Return on Investment (in %)	9	1
Financial position (in %)	45	17
Productivity indicators		
Turnover per FTE (or employee) (´000€)	205	-8%
Net profit per FTE (or employee) (´000€)	11	+12%
Running cost to turnover ratio in %	92	-1

Comment on possible development in the coming years (e.g.):

- *changes in inputs: domestic/imports*

The Portuguese fish processing industry has an enormous dependency on imports, and that shall be the same in future. Only cannery still depends on domestic production (for sardine and mackerel, while tuna has high dependency on third country imports).

To the salting and drying subsector the dependency will be the same for the next years. It isn't expected that aquaculture can provide an alternative in the next years, even there is same raw material that came from that kind of origin.

- *on profitability (total vs average);changes in profitability*

Only one year variation and so tight variables (no comparison possible at this time, for instance with other sectors of the fisheries sector) gives no room to a reliable analyses.

- *changes in inputs: domestic/imports*

Domestic market shows slow growth rate after some decrease on cannery due to international market situation, and more recent evolution of international cod price: changes on international market for cod supply brought instability, but also opportunity; China is now seen as an important participant in the cod business.

Cannery exports knew unexpected growth in last couple years: while the domestic market get a considerable growing in the last years, absorbing the diminishing export of sardine products that occurred at the same time.

- *other reasons for changes: general economic, policy issues*

After the approval of the EU structural funds, companies restart the flux of investments (same were projects that were already started with the previous).

Comment on data

Data sources, coverage, reliability

Primary source – From inquiry made by the General Directorate for Fisheries and Aquaculture (DGPA)

Secondary source – From the National Bureau of Statistics (INE). When this data is presented, differences from DPGA origin data are possible.

Full coverage of the universe of companies on fish processing industry, with 41% response rate.

Medium to low reliability with most parameters with a precision level 0 or 1 for a level of confidence of 95%

Have one or two examples with the input/output structure to have an idea about way to go?

Think that factory level should be an absolute need, as a basis to possible segmentation and/or territorial level outputs.

Data related only to the Company level shows enormous differences towards the one processed at factory (or plant) level. That option, if occurs, it will switch the regional/geographical reference from the real site of production to the main office address, and in some cases (mainly the big firms situation) it'll aggregate enormous amount of production in one region that, by absurd, could have not even one factory present.

The data origin came from two main sources: from the National Statistical Institute (INE) and from inquiries conducted by the Directorate General for Fisheries and Aquaculture (DGPA)

6.16. Romania

Overview of the sector

Size of the industry

The Romanian processing industry includes 87 firms, processing 6 540 tonnes of raw material with a total turnover of 21 492 362 €. The total employment generated is 929. However employment is not calculated by FTE but considering full time and part time workers equally. The industry is mainly composed of very small firms, with 77 firms of less than ten workers of a total of 87 processing firms.

Main products – main segments

The industry is characterized by the small units; most of them located in super markets chains, in the big cities of the country around 85 %. These firms own the major capital invested in the branch 86.14 % from the total industry. The biggest firms are located on/around Bucharest, the focal point of consumption, having more than 10 % from the total population of Romania.

Main products – main segments

Data from Romania is well segmented by firm size for all the data items available. Further than this, volume of raw material is detailed by species; and production in both volume and value is specified by product category. The main species by volume processed is the Asian carp with 2 100 tonnes. Other species with significant volumes are carp, catfish, salmon and cod. By value, the most relevant products are marinated fish with 7 793 611 € followed by pre-cooked fish (5 912 386 €) and smoked fish (4 353 299 €).

Table 6.16.1: Raw material

Main raw materials	**2008**
	Volume (tn)
Asian Carp	2 100
Carp	900
Catfish	850
Total	**6 540**

Table 6.16.2: Main products

Main products	**2008**	
	Volume (tn)	**Value ('000 €)**
Pre-cooked fish	1 746	5912
Marinate	1 733	7794
Smoked	767	4353
Total	**4 964**	**21 492**

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

The processing industry depends on proportion of 61 % of domestic production (fishing and aquaculture). From the total processed quantity 39 % are from imports (2 542 tonnes). The main species imported : salmon 750 tonnes, cod 650 tonnes, pangassius 110 tonnes, seabream 52 tonnes and carp 300 tonnes, come from EU countries (Norway, UK, Hungary, Poland, Slovakia, Greece) and ex – EU countries (e.g. for pangassius). The main part of production is delivered to domestic market, the quantity exported being very small – 70 tonnes.

Economic performance and competitiveness

Table 6.16.3: Economic performance and competitiveness indicators in 2008

Indicator	**2008**
Structural indicators	
No of firms	87
Employment	929
Performance indicators	
Turnover*** (´000 €)	21 492
GVA (´000 €)	15 634
GCF (´000 €)	4 385
Net profit* (´000 €)	2 807
Return on Investment (in %)	6.3
Financial position (in %)	n.a.
Productivity indicators	
Turnover per employment (´000 €)	42
Net profit per employment (´000 €)	5
Running cost to turnover ratio in %	79.6

Comments on data

The first National Programme Data Collection under the DCF was executed on 2008, after the addmission of Romania in EU. Therefore, 2006 and 2007 data is not available.

6.17. Slovenia

Overview of the sector

Size of the industry

a) In 2007 there were 11 companies and in 2008 there were 12 companies in the Slovenian fish processing sector. Between 2007 and 2008 the number of companies increased by 9%. In 2007 Slovenia had 6 companies with less than 10 employees, 4 companies with 11-49 employees and one company with 50-249 employees. In 2008 was founded a new company with less than 10 employees, so in this sector was 7 companies of this year.
b) In 2007 the turnover was 25 761 000€, in 2008 increased by 12, 7% and amounted 29 037 000€.
c) The value of raw material increased by 11, 3% from 2007 to 2008 and it was 14 789 000€ in 2007 and 16 454 000€ in 2008.
d) In the Slovenian fish processing sector was 213 FTE employees in 2007 and 211 FTE employees in 2008. Employment was therefore reduced by 0, 9%.

Nature of the industry: concentration

Most Slovenian fish processing companies is located on the Slovenian coast, including the largest Slovenian company which employing 38% of all persons employed in processing industry and representing around 40% of all income. All companies which are located on the Slovenian coast representing 77% of all income of Slovenian fish processing industry.

Main products – main segments

In the case of Raw material per species (tonnes) and Income (turnover) per product only six companies are compiled the data, others are opinions that this is a trade (business) secret. That is the reason that we do not have these data from the largest Slovenian company which produced fish pates and various fish cans (sardines, tuna, anchovies, mackerel filets …). Disregarding the largest Slovenian company, the main products in Slovenian fish processing industry in 2007 are Tuna pate (12% of all income), squid – fresh or frozen (3% of all income), dried cod spread (1.6% of all income), Alaska Pollock (1% of all income) and hake filet (0,9% of all income).

Table 6.17.1: Raw material

Main raw materials	**2007**	**2008**
	Volume (tn)	**Volume (tn)**
BFT - tuna	268	586
SQR - squid	256	354
ALK – Alaska Pollock	108	
SAL – Atlantic salmon		131
Total	632	1 071

Table 6.17.2: Main products

Main products	2007		2008	
	Volume (tn)	Value (‘000 €)	Volume (tn)	Value (‘000 €)
Tuna pate	661	3 112	1 255	6 126
squid	141	774	235	1 359
Dried cod spread	37	409	56	592
Salmon pate			154	903
Total	839	4 295	1 700	8 980

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

Slovenian fish processing industry mainly depends on imports of raw materials. The raw material for fish processing industry is traded from all over the world. Only a few companies depend on local landings of sardines and anchovy.

Economic performance and competitiveness indicators:

Table 6.17.3: Economic performance and competitiveness indicators in 2007-2008

Indicator	2008	Variation from 2007
Structural indicators		
No of firms	12	+9%
Employment (FTE)	211	-1%
Raw material (´000€) (Production)	16 454	+11%
Raw material ton only for 6 companies	1327	+46%
Turnover (´000€)	29 037	+13%
Performance indicator		
GVA (´000€)	11 572	+15%
GCF (´000€)	7 242	+16%
Net profit (´000€)	3 610	-27%
Return on Investment (in %)	85	-40
Financial position (in %)	29	-70
Productivity indicators		
Turnover per FTE (´000€)	121	+14%
Net profit per FTE (´000€)	23	-26%
Significant costs changes (´000€) - Energy costs	600,52	+59%
- Labour costs	4330	+13%
- Other running costs	410	-22%
Running cost to turnover ratio in %	75	-1,3

Comment on possible development in the coming years (e.g.):

- We can expect that the income and the profit in the coming years will increase, because the Slovenian processing industry is developing and shifts in foreign markets.

- Slovenian fisheries sector is affected by the small size of our sea fishing area, significant characteristic of Slovenian fleet is also age. Average age was calculated at approximately 32, 37 years in 2007. Because of that and because of increase in markets, the Slovenian fish processing industry will be even more dependent on imports of fish raw material.

In the period 2007-2008 the processing companies in Slovenia made profits. The companies were on average more prosperous than those in activities of fisheries and fish farming.

In 2008 the profit fell by 27% compared to the year 2007. The reason for this fell is probably an economic crisis and the reduction of prices of certain product and increasing investment in 2007.

Comment on data

According to the data from Veterinary Administration of the Republic of Slovenia (VURS) fourteen companies are authorized for processing of marine fish and other marine organisms in Slovenia. From this list were excluded two companies which do not process maritime organisms.

Target populations are therefore all companies who have a license for the processing of maritime organisms and the processing involved in practice. The number of such enterprises in Slovenia in 2008 is twelve. In June 2009 the questionnaires were sent to all twelve enterprises and they all also returned the questionnaire. Therefore, the response was 100%. In the case of Raw material per species (tonnes) and Income (turnover) per product only six companies are compiled the data, others are opinions that this is a trade secret.

Economic data on the fish processing industry are collected from accounting records – AJPES (Agency of the Republic of Slovenia for Public Legal Records and Related Services) and through questionnaires that are sent to all processing companies in Slovenia.

Slovenia has a few processing companies that are entirely committed to fishery products. Most companies do have different types of processing activities, of which fish may be one, but not necessarily the most important one. This was taken into account when we putting together the questionnaires and in the subsequent analysis of the data provided.

The national programme for collection of economic data for the processing industry combines information from three main resources:

- Questionnaire information returned from processing companies on a voluntary basis,
- The Central Statistical Office of Slovenia,
- The annual accounts of business enterprises.

The data collected from all sources are combined in such a way that a complete set of accounting items is compared for each business enterprise.

6.18. Spain

Overview of the sector

Size of the industry (in a text without subheadings)

The fish processing sector in Spain is conformed by a total of 620 firms with an overall turnover of 4 549 564 €. There is no data available for production volume or value. The use of raw materials has increased in the period 2006/2007 by 4.82% with a total value of 2 366 728 €. In terms of employment the industry amounts to 21 418 FTE, with a variation in the period 2006/2007 of 0.93%.

Nature of the industry: concentration

The industry structure is concentrated on the micro and SME sizes. There is a large segment of micro and small firms (more than 500) and two representative groups of medium firms (84) and large firms (15). However, available data is not segmented by firm size.

Main products – main segments

Tuna, mussels, sardines, shellfish and anchovy are the main products of the Spanish caning industry. Canned tuna represents the largest share of Spanish production. However there is no disaggregated data on the share of each species in raw materials or final production.

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

Spain produces a significant proportion of its canned tuna using whole frozen tuna as raw material. However there is a growing trend of using tuna loins imported from Ecuador, Venezuela and El Salvador.

The Spanish canning industry has significant links with the Italian processing sector. Spanish canneries have bought several Italian trademarks, and thus now Spanish companies are processing tuna for the Italian market in their canneries in Galicia. This becomes evident from the increase in Italian imports of canned tuna from Spain year by year.

Mussel, sardine, shellfish and anchovy are processed on a seasonal basis, and these products are bought to the artisanal/coastal fleet and aquaculture sector in the north coast. A typical example of this is the shellfish processing industry in Galicia. Therefore the link between artisanal fisheries, mussel aquaculture and processing industry is a remarkable aspect of dependency on national raw material.

Economic performance and competitiveness:

Table 6.18.1: Economic performance and competitiveness indicators in 2006-2007

Indicator	2007	Variation from 2006
Structural indicators		
No of firms	620	5%
Employment	21 418	1%
Performance indicators		
Turnover (´000 €)	4 549 564	6%
GVA (´000 €)	1 611 276	9%
GCF (´000 €)	1 133 734	10%
Net profit (´000 €)	952 070	11%
Return on Investment (in %)		
Financial position (in %)		
Productivity indicators		
Turnover per FTE (or employee) (´000 €)	212	5%
Net profit per FTE (or employee) (´000 €)	44	10%
Running cost to turnover ratio in %	75	-1

According to the data available it is not possible to comment on the evolution of the profitability of the sector.

There are two special cases in relation to the raw material (inputs) in the Spanish processing industry, the bay of Biscay anchovy and the surimi.

After the closure of Bay of Biscay anchovy fishery, more and more imports from Mediterranean and Pacific anchovy are entering the processing channels. This represents a threat to the link of national coastal purse seiner fishing anchovy with the fishing industry, as it is uncertain that the processing industry will return to process Bay of Biscay anchovy when the fishery reopens.

A special case referred to the Spanish processing industry is that of the surimi industry. Surimi eel is now a popular processed fish product as an alternative to fresh eel, due to the high prices reached by fresh eel as it became more and more scarce until the final closure of the fishery due to the very poor state of the stock.

6.19. Sweden

Overview of the sector

From 2001 to 2007 the number of enterprises operating in the Swedish processing industry increased from 177 to 219, an increase that were most significant in the smaller enterprises. The number of FTE increased from 1 858 to 1 867 although it fluctuated during the period. The net turnover increased with 39 % to a total of 537 million Euros. The Swedish processing industry is mainly located to the west and the south coast of Sweden, as is the major part of the fishing fleet.

Size of the industry

In 2007 a total of 219 firms operated in the fish processing industry in Sweden, an increase of 5 % since 2006. The total net turnover increased with 5 % from 2006 to 2007 to a total of 537 million Euros in 2007. No data is collected on production volume although the production value increased with 1 % to a total of 472 million Euros in 2007. The number FTE increased with 3 % to total of 1 867 FTE in 2007.

Nature of the industry: concentration

The Swedish fish processing industry is to a major extent located at the west and the south coast. The processing industry in the county of Västra Götaland accounted for 68 % of the net turnover in 2007. Västra Götland is followed by the counties of Blekinge 8.8 %, Halland 5.6 % and Skåne 3.7 % of the total net turnover. The same pattern is displayed in number of enterprises and number of employees. This pattern pretty much follows the same pattern as the concentration of the fishing fleet which is located to a large extent at the west and south coast.

Main products – main segments

The Swedish processing industry produces a wide range of products, ranging from filleted herring and cod to prepared dishes, caviar substitutes and various smoked products. The main part of the income comes from various form of products made from herring. Sprat is also an important species for the Swedish processing industry. The sector itself is very heterogeneous with both small family businesses processing their own landings and larger enterprises with an industrial production.

Due to the nature of the data the only segmentation possibilities today is by the size of the business. Segmentation by species or product is currently not available. Although relationship between business size and diversification exists since smaller enterprises tend to specialise whereas larger enterprises produce a wider range products.

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

Dependency of domestic production depends itself on the size of the enterprise. Smaller family enterprises are more dependent on local landings than larger enterprises. On overall the Swedish processing industry depends to a large extent more on imported raw material than on domestic landings. Swedish aquaculture sector produced in 2007 around 6 000 tonnes of fish and shellfish for human consumption making it a smaller contributor in the supply of raw material for production of processed goods.

Data on trade patterns and domestic landings displays a pattern where domestic landings are decreasing and the imports of fish that is fresh, frozen or primarily processed is increasing. The export of the same goods has been increasing as well but at slower pace. The total of the import and export i.e. the net export has been decreasing during the last decade. Some of this increase in imports is being used for direct human consumption but large part is going in into the processing industry as raw material. Approximately 70 - 80 % of the input raw material in the processing industry is imported where Norway, Denmark and Germany are the largest trading partners.

Economic performance and competitiveness indicators:

Table 6.19.1: Economic performance and competitiveness indicators in 2006-2007

Indicator	2007	Variation from 2006
Structural indicators		
No of firms	219	5 %
Employment (FTE)	1 867	3 %
Performance indicators		
Income[1] (‘000 €)	537 165	5 %
GVA (‘000 €)	114 861	8 %
GCF (‘000 €)	35 410	- 5 %
Net profit (‘000 €)	16 472	- 20 %
Return on Investment (in %)	10	1
Financial Position[2] (in %)	53	- 8
Productivity Indicators		
Turnover per FTE (‘000 €)	288	2 %
Net profit per FTE (‘000 €)	9	- 26 %
Running costs to turnover ratio (%)	96	5

[1] Turnover

[2] Financial position is calculated as own capital divided by borrowed capital

The Swedish processing industry has shown a steady increase in net turnover from 2001 to 2007 both in totals and on average. The net profit has been fluctuating during the same period but displays a positive trend. This development is expected to continue.

Currently the main part of the raw material used in the processing industry is imported and this relationship is not expected to change. It is more likely that imported raw material will play an even bigger part as inputs in the fish processing industry in the future.

6.20. United Kingdom

Overview of the sector

Size of the industry

The UK fish processing industry has reduced in size in recent years. The changes to the industry have involved rationalisation and consolidation. There are now 454 processing businesses employing 14,660 FTEs with a total turnover of approximately £2.6 billion. It is estimated that the total production volume is 470,000 tonnes of output from an input volume of 680,000 tonnes.

Table 6.20.1: Number of enterprises in segments

Size FTEs	Number of enterprises
0 – 10	251
11 – 49	140
50 – 249	55
>250	8
Total	454

Nature of the industry: concentration

The industry is characterised by a small number of large, multi unit businesses and a large number of small single site businesses. Seafood businesses employing 100 FTEs or more account for only 6% of processing sites but nearly 50% of total employment. By contrast, small processing units employing 10 people or fewer account for more than 50% of all processing units yet provide less than 10% of total employment.

In recent years there has been consolidation within the industry with acquisitions by already large seafood processing businesses. This means that a high proportion of industry employment and production is now concentrated within a small number of very large multi-unit seafood processing companies.

The key geographical area for fish processing in the UK is Humberside. Humberside, which includes both Hull and Grimsby, is home to some of the UK's largest seafood processing businesses and the industry provides over 4 000 FTE jobs in the area. The majority of processing employment on Humberside involves secondary processing or mixed processing (with an emphasis on secondary). While large secondary and mixed processors provide the majority of employment and production in Humberside, there remain a significant number of processing units and employment within smaller primary and mixed processors. The main supply source for Humberside processors are importers and the main customer type are multiple retailers.

Grampian in the north east of Scotland is the second most significant area for fish processing in the UK with over 3 300 FTE jobs provided by the processing industry in this region. In Grampian the majority of employment is within businesses undertaking a mix of both primary and secondary processes with only a small number of jobs within processing businesses undertaking only one type of processing. As with Humberside, there are a large number of small processing businesses within Grampian. The most common source of supply for Grampian based processors is locally landed fish. Grampian processors main customers groups are other processors and wholesale markets.

The remainder of the industry is based around coastal areas in South West England, North England, Northern Ireland and the Highlands and Islands in Scotland. Processing businesses in these areas have a tendency to source raw materials locally. These businesses also have a greater tendency to sell their products locally than many of the large processing businesses based in Humberside.

Salmon

The UK has a large salmon processing industry. The salmon processing industry provides 5 223 FTE jobs at 71 processing units. Statistics for the salmon processing industry are not included in this chapter. Further analysis would be required to produce financial information and production volume statistics for this industry.

The majority of the UK salmon processing industry is based within Scotland. Salmon processing businesses rely heavily on aquaculture production and there is often a greater degree of vertical integration within the salmon supply chain than is apparent in the seafood processing industry. Salmon is also imported from a number of countries including Sweden, Faroes, Norway and the USA. The key export markets for salmon are the USA and France.

Main products – main segments

The main products produced by the industry include:

Whitefish fillets (cod, haddock, pollock): fresh, frozen and breaded

Shellfish (warm & cold water prawns, nephrops): fresh, frozen, breaded

Pelagic species (herring, mackerel): fresh, frozen, smoked

Added value products: utilising a wide range of species for a wide range of products including ready meals.

Main segments:

The industry can be segmented into primary, secondary and mixed processing units. The majority of processing businesses and employment within the industry is within mixed processing units.

The industry can be segmented by species processed (demersal, shellfish, pelagic, mixed). Businesses processing a mix of species form the majority of the industry.

Main Market Segments

Retail: the majority (over 50% by value) of production output in the UK goes into the multiple retail supply chain

Wholesale markets: the second most important market for UK processors is the wholesale market which attracts around 15% of output by value.

Exports: exports are the third most important customer type for UK processors. The majority of exports are to countries within the EU but exports to countries outside the EU are also significant. When combined, these two types of export account for 12% of processor production output (by value).

Dependency of domestic production (fishing/aquaculture) - including import: main trade partners/species

UK processors are increasingly reliant upon imports for raw materials. The total UK supply of seafood is in the region of 1.1 million tonnes of which 670 000 tonnes is imported in comparison to 440 000 tonnes of domestic landings. Aquaculture is less significant in terms of seafood processing as approximately 30 000 tonnes of aquaculture species are available for UK processors (this figure does not include salmon production).

Processors' methods of sourcing supplies differ and the size of the processing business is an important factor in relation to the sourcing practices adopted. Large processors are more likely to import raw materials and supplement these with local landings. This is largely due to the scale of these larger businesses and the fact that they require consistent and continuous supply of materials to meet customer demands. In many cases these large processors cannot guarantee consistency of supply from domestic sources. Key trading partners for imported seafood materials are Iceland, Denmark, Norway, China, Germany and Faroes.

Smaller processors are more likely to source supplies locally from domestic landings and are often primary processing businesses. These smaller businesses often have the flexibility to react to changing supply situations and to make use of different species as required. These smaller processors are likely to access a range of different customer types including wholesale markets, food service markets, exports and secondary processors.

Demersal Species

In recent years the volume of UK landed demersal species available to UK processors has decreased. Imported demersal species now constitute 75% of the total demersal species supply available to processors in UK. Key imported products in 2007 included cod (Iceland, China, Denmark), haddock (Iceland, Norway, Faroes), pollock (Germany, USA) and coley (Faroes, Iceland, Norway). Whitefish may be imported in different formats including head on gutted chilled materials, frozen fillets and other partially processed materials.

The number of processors in the UK that process exclusively demersal species has reduced in recent years. Processors that previously worked only with demersal species have diversified and now work with a range of species. This is a reaction to the inconsistent supply environment and the necessity to spread risk and expand portfolios of product types.

The UK is heavily reliant upon imports for the key species of cod and haddock. In 2007, 117 000 tonnes of cod were imported in comparison to only 19 000 tonnes of UK landings. In relation to haddock the gulf between landings and imports is not as great but imports of 70 000 tonnes are more than double the UK landings of 33 000 tonnes.

Shellfish Species

The volume of shellfish species landed in the UK has increased in recent years with landings of nephrops and crab largely responsible for this increase. The overall ratio of landed shellfish to imported shellfish is in the region of 50% landings and 50% imports. Much of the volume of imported shellfish is warm or cold water prawns which require little or no further processing within the UK. Large volumes of shellfish are exported each year. Key markets for exports of shellfish include Spain and France for crabs whilst Italy, France and Spain are the key nations for exports of nephrops and scallops.

Shellfish processors in the UK are more likely to source rely upon domestic landings than other segments of the industry. Many shellfish processors have direct contracts with the catching vessels or source supplies from local merchants. This can allow these processors to influence the quality of catch and enable them to achieve premium prices for their products.

Pelagic Species

The volume of pelagic species available to UK processors has fluctuated in recent years. The vast majority of pelagic species processed in the UK are sourced from UK landings with very little imports (official statistics for pelagic landings include canned tuna and also foreign vessels landing their catch in the UK). Processors are affected by varying total allowable catches and these have fluctuated in recent years. For example, North Sea herring had a TAC of 454 000 tonnes in 2006 but only 201 000 tonnes in 2008, these fluctuations make it difficult for processors to match capacity with supply.

The UK exports large volumes of pelagic species each year. In 2007 large volumes of herring were exported to Netherlands (22 000 tonnes), Germany (8 000 tonnes) and Russia (8 000 tonnes). In 2007 mackerel was also exported in large volumes to Russia (41 000 tonnes) and Netherlands (14 000 tonnes).

Economic performance and competitiveness indicators:

Table 6.20.1: Economic performance and competitiveness indicators in 2006-2007

Indicators	2007	Variation from 2006
Structural Indicator		
No of firms	454	
Employment	14 660	
Raw material ton (Production) Input / Output	681 000 t 472 000 t	
Performance Indicators		
Turnover (´000 €)	3 525 473	
GVA (´000 €)	607 737	
GCF (´000 €)	118 445	
Net profit (´000 €)	8 703	
Return on Investment (in %)		
Financial position (in %)	5.5:1	
Productivity indicators		
Turnover per FTE (or employee) (´000 €)	240	
Net profit per FTE (or employee) (´000 €)	0.6	
Running costs to turnover (%)	97	

*Exchange rate GBP 0.7335 to 1 Euro as per European Central Bank exchange rate at 31/12/07

Comment on possible development in the coming years:

The level of profitability within the industry has been a concern for processing businesses in recent years. The industry tends to operate with small profit margins and this means that it is sensitive to input cost fluctuations. Rising energy costs affected businesses during 2007 and 2008. Although these energy costs have reduced since 2008, the impact that they had on the industry demonstrated that the industry is exposed to energy cost rises. Such energy costs relate not only to the cost of production but also to transport and distribution costs and they can also affect the cost of raw materials.

The price of raw materials is an input cost that affects the industry significantly as it is the cost which absorbs the greatest proportion of turnover. When raw material costs are high, profit margins have a tendency to fall. There are different dynamics affecting different types of processor. Processors reliant upon imports may be better placed to secure continuous supplies at a constant price than processors reliant upon local landings. The processors reliant upon imports are however exposed to currency fluctuations (which may or may not be offset by hedging currency). By contrast processing businesses relying on local landings may find it more difficult to source consistent supplies at a consistent price. When the price of domestically landed fish is high this affects processors sourcing locally as in many cases they find it very difficult to pass on increasing raw material costs to customers. It may also make their products too expensive and therefore unattractive to their customers.

The supply of raw materials into the processing industry has evolved over the last decade and continues to do so. Supply of raw materials is a key concern for the industry across all sizes

and types of processing business. There appears to be a tendency for larger processors to source more raw materials from imports. These larger processors will draw upon locally landed materials as a supplement to imported materials. The reasons for this are quite clear: large processors require large volumes of raw materials and they require a consistent and continuous supply of these materials in order to meet customer demands. Relying on domestically landed raw materials cannot deliver this consistency and continuity of supplies. Smaller processors may be better placed to adapt to fluctuations in local supply but may not be able to import their supplies in the same manner that a larger processing business can. Sourcing locally means that smaller processing businesses may be exposed to changes in catching sector regulations. It may be considered unlikely that domestic landings will increase to the extent required to satisfy UK demand in the foreseeable future.

There are other supply issues currently affecting the processing industry. Increasing volumes of new 'alternative' species such as tilapia and pangasius are being imported into the UK for both processing and consumption. Although the volume of imports of these species is relatively insignificant in comparison to the key consumption species, the trend is significant. It may be that increasing volumes of these species are imported for consumption and this may affect both the price achievable for domestically landed species and also the demand. Lack of continuity of domestically landed and processed whitefish can also lead to customers of the sector (wholesalers, distributors and retailers etc.) switching to alternative sources of supply which may be imported frozen fillets or alternative species. If customers switch away from domestically landed and processed materials it can be difficult to win back the custom when domestic supplies improve.

The UK processing industry is adapting to increasing demands for good environmental credentials. Many processing businesses now have environmental policies and source materials from accredited sources such as MSC. For many processors taking these steps are necessary as they provide access to markets (particularly multiple retail markets) which require good environmental credentials. Other processors are taking proactive measures as they expect demands in this area to continue to increase and they are eager to ensure they meet the necessary criteria.

A shortage in the supply of skilled labour is an issue which UK fish processors expect will become increase in the foreseeable future. In recent years the UK processing industry has harnessed the labour of new EU member states to fill the labour gap and provide the necessary employees for production. This labour supply may not always be available or easily attracted to the UK industry in the future and this leads the industry to be concerned about how they will access suitably skilled workers in the coming years.

7. Summary on EU level of economic performance

Following this first data call on the processing industry the subgroup concentrated on the methodology of the national chapters without putting much effort in discussion to compile information's on the EU level. One important issue was the calculations of economic performance indicators especially on the competitiveness of the sector. The following table summarizes some of the results on these indicators from the national chapters.

Table 7.1: Summary economic performance of the EU fish processing industry

	2007					
	Turnover (income)[a]	GVA [a]	ROI [a]	Turnover/FTE [a]	Net profit/FTE [a]	Employment/FTE
Belgium	400 426	84 668	12%	403	36	993 (Empl.)
Bulgaria	22 752					
Cyprus	20 947[b]	5 683[b]				
Denmark	1 946 599	222 550	-49%	436	-7	4 428 (FTE)
Estonia	104 219	23 756	3%	50	0.6	2 103 (FTE)
Finland	150 000	28 700	0%	387	0	387 (Empl.)
France	4 345 955			187		23 240 (Empl.)
Germany	2 301 246	125 222		294	32	7 816 (Empl.)
Greece	186 719			86		2 175 (FTE)
Ireland						
Italy	3 152 922	358 188	3%	407	8	7 750 (Empl.)
Latvia	167 935	19 860	-164%	30	-14	5 648 (FTE)
Lithuania	177 516	27 546	-9%	44	-1	4 040 (FTE)
Malta						
Netherlands	784 005	165 329	2%	251	10	3 210 (Empl.)
Poland	1 276 247	202 089	16%	8	0.3	14 149 (FTE)
Portugal	1 293 976	171 205	9%	205	11	6 301 (Empl.)
Romania (2008)	21 492	15 634	6.3	42	5	929 (Empl.)
Slovenia	29 037	11 572		121	23	211 (FTE)
Spain	4 549 564	1 611 276		212	44	21 418 (Empl.)
Sweden	537 165	114 861		288	13	1 867 (FTE)
United Kingdom	3 525 473	607 737		240	0.6	14 660 (Empl.)
Total	24 994 195	3 795 876	206	206	13.8	121 325

a) in 1000 €
b) unofficial estimates

It should be noticed that out of the 27 countries that the EU is compounded, 5 of them do not have coastal waters, and were not included in the DCR framework (Austria, Czech Republic, Hungary, Luxembourg and Slovakia). Out of the remaining 22 countries that participated in

the DCR framework Ireland and Malta didn't submit data and Cyprus submitted disagregated data that didn't allow us to obtain proper estimates.

In the future with more countries delivering data (especially France as one of the three most important countries with respect to fish processing) it may be possible to give a more comprehensive overview.

The overview on the economic performance shows almost 25 bln. € in turnover, 4 bln. € in GVA and nearly 120 000 employees (mostly calculated in FTE). This shows the importance of the sector especially taking into account some regions within several countries which are dependent on this industry.

A closer look on the Turnover/FTE indicator reveals that three countries are over 400, one more at 387 and then a larger group between 205 and 294. The new member states are below 100. For the net profit/FTE indicator the picture is more diverse with some countries having losses or rather small profits. Three countries are above 32 with Spain leading with 44. There seems to be no clear correlation between Turnover/FTE and Net profit/FTE.

8. Trends and drivers for change

There are lots of trends and drivers in the fish processing industry. We need to observe these to see how they interact and develop over time.

Globalisation and the increased internationalisation of the seafood supply chain are possibly the key trends in the industry and have implications and effects on the industry which may increase in the coming years.

Supply

The globalisation of seafood supply chains has increased in recent years and may continue to do so in the medium term future. EU processors, particularly larger processors, often source raw materials from across the globe and have developed the capabilities to do this efficiently. Sourcing of seafood from across the globe is necessary as the EU does not have the volume of landed seafood to satisfy consumer demand.

As total allowable catches are set on an annual basis and management plans are subject to regular changes, the supply into the EU varies during the year and over years. This fluctuating supply helps to drive increases in global sourcing as large processing businesses require continuous and comparable supplies. The fact that supply volumes are subject of changes can affect local markets: processors may switch out of local landed species and utilise imports whilst the customers of processors may switch to imported finished products or substitute species. The inconsistent nature of supplies adversely affects investment in the industry as it is very difficult for smaller businesses to develop business plans based around local landings. It is also difficult for processors to achieve optimum capacity in their business when they are unable to accurately forecast supply volumes.

The EU imports partially processed materials from across the globe and it also sends raw materials overseas for processing in lower labour cost regions. This is effectively the outsourcing of processing, particularly the primary processing stage, and can often increase yields alongside reducing costs. There are a number of issues connected to this: more outsourcing of production affects EU processing employment opportunities; there are implications for food safety, hygiene and quality; and it may affect the long term processing capabilities within the EU. If the EU imports increasing volumes of partially processed seafood it raises questions relating to trade barriers of both a tariff and non-tariff nature which may be used to protect the EU processing industry. The EU may also be exposed to lower production cost areas dumping materials onto the EU market in a manner which could threaten EU production.

The development and growth of aquaculture is another trend in the industry. Technological advances are improving production efficiency in aquaculture and yield rates. New species, for example cod, are being farmed commercially and may become more profitable if further advances in production can be made. Aquaculture species from Asia are becoming more prevalent in the EU market. These species have established themselves in many EU

marketplaces and it may be expected that the volume of these will increase in future years. If this issue is considered in a 10 – 20 year time frame it can be argued that the EU should be investing in aquaculture of seafood species in order to ensure that food supplies are secure over this longer timeframe. Investment in this area would also ensure that the EU can make the technological advances which will be necessary for an aquaculture sector to be competitive globally.

The competition for raw materials across the globe is encouraging seafood companies to invest abroad in order to secure supplies. An example of this is the Norwegian investment in Chilean salmon farms and processing plants. Spanish companies have also invested in the South American tuna industry. As global populations increase, and if forecast increases in demand for seafood materialise, then competition for supplies may well intensify. Companies making early moves to secure supplies may gain an advantage.

Competitiveness

The competitiveness of the EU seafood processing sector on a global basis is a major issue. If seafood is viewed simply as a commodity then countries with a comparative advantage will be more competitive than the EU. It may be that labour costs will rise in what are currently low labour cost regions however this may not be large enough rises or they may not occur soon enough to benefit the EU processing industry. This is a key issue as price is a major driver in purchasing decisions at all levels of the supply chain. It will be difficult for EU processors to compete with extra-EU imports, on a processing level, in terms of purely price. There are options to increase competitiveness of the EU industry. Greater levels of vertical integration could yield greater competitiveness and it may also be possible for EU processors to differentiate their products on the basis that they are produced in the EU.

Many EU member states have already experienced consolidation in their processing industries. Despite this consolidation many nations retain large numbers of small seafood processors. These smaller processors often rely upon locally landed materials but have a greater level of flexibility and can often adapt better than large businesses to fluctuating supplies. These smaller businesses may struggle to achieve economies of scale which would make them more competitive.

Demand

Consumer demands for products evolve over time and seafood products are not an exception to this. In some countries demand for convenience products, such as ready meals, have increased whilst in others demand for these products is increasing. Changing patterns of demand and consumer buying habits must be monitored by industry so they can be proactive in terms of product development. There appears to be growing consumer interest in niche seafood products and demand for the experience of specialised products. This may be an area of opportunity for seafood processors and it may offer an opportunity to command premium prices. It may be that smaller or medium sized operations are best placed to take advantage of this trend as these sizes of business can often be flexible in their product offerings.

Certification and Environmental Issues

Sustainable resource use and environmental issues, such as impacts of fishing methods on non-target species and habitats, have emerged in recent decades and are likely to be of increasing importance in future years. Sustainability of stocks has already impacted in the EU processing industry. For example, in Spain the Northern Anchovy canning industry is no longer viable or sustainable as the raw materials are no longer available. Some of the supply issues discussed above are a consequence of the stock sustainability situation. Sustainability of stocks in the sense of the physical supply of materials is an issue for processors.

There is another aspect to the stock sustainability situation which relates to the accreditation of stocks. Processors are increasingly driven to source their materials from accredited sources, for example MSC certified fisheries. This trend is driven by multiple retailers who are often eager to protect themselves from the attention of NGO pressure groups and subsequently consumer interests. The pattern of trade is important to this aspect of supply. For example, if a processor wants to sell into the German market then MSC accreditation may be of greater importance than if they want to sell into the markets in Russia or Southern Europe.

Products produced from materials sourced from accredited stocks may offer the opportunity for product differentiation and may provide a premium price possibility. In the longer term however it may be the case that such accreditation is simply a requirement for access to markets and is no longer a factor enabling premium pricing. Accreditation of stocks and sourcing accredited products increases costs. Although it may be possible to achieve a price premium for these products it is not clear who receives this premium and it is also unclear if processors (or the fleet) are able to fully pass these costs on to their customers or the consumer.

9. Future possible issues following the data analysis

9.1. Dependency on EU fishing fleet/quotas

It was not possible in this first meeting on the fish processing industry and a first analysis of the data collected under the DCR framework to do a comprehensive analysis of the dependency of the industry on the landings of the EU fishing fleet and, therefore, the quotas. In some of the national chapters and in the analysis of possible drivers for change some aspects are included which may give a first impression on this issue. This shall be included again in the TOR for a possible second meeting. However, it was the feeling in the group that additional information's on the fish market is necessary to follow the fish from landing to the consumer. The results from the project answering the call for tenders on a market observatory system within the EU may help to address these questions at a later stage.

9.2. Possibilities for deeper economic analysis – present and future

Regulation 1639/2001 – analysis possibilities on present data

Data collected according to regulation 1639/2001 is segmented by species. Data on raw material is collected in tonnes per species and in value (cost). For products prices and volumes are collected. Data is collected on primary and secondary production.

Based on this data different types of economic analysis's can be conducted. For example:

Input/output analysis of the processing industry's dependency on domestically landed and imported raw material. This can be done for of two purposes. The first one is to link the processing industry's production to the stocks and TAC and how they are affected. The other one to conduct sensitivity analysis's on changes in foreign trade. For instance if a trading partner raises the price level or constitutes a tax/subsidy on import/export.

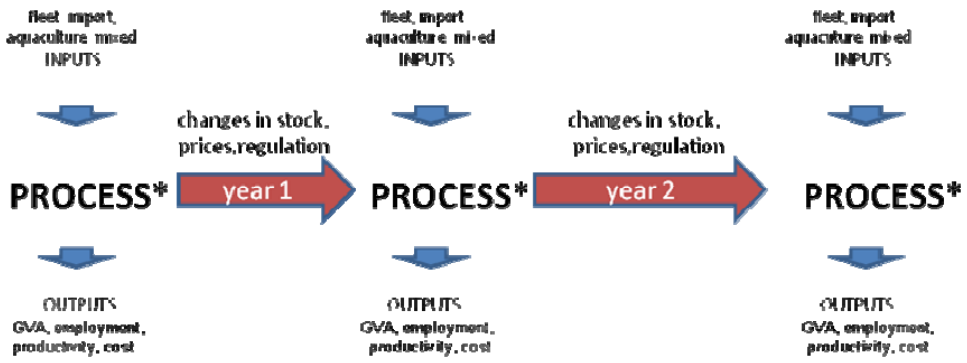
This information is also useful to trace dependency on trade regulations and to evaluate potential drivers for the processing industry as the demand for certified fish products. The evolution of the characteristics of these raw materials across time would help to identify the origin of changes in costs (changes in price or availability of certain species) and their influence in competitiveness.

Based on data on primary and secondary sectors, analysis of the change in the structure of the industry can be carried out. Analysis's on how dependent the countries industries are on primary and secondary products produced in other countries (EU or third countries). This would say something about the development of the industry if it moves towards producing more secondary products importing primary products from other European or third countries.

To further evaluate the competitiveness of the processing industry it would be helpful to detail the inputs and outputs of different segments. Segmenting by species used as raw materials, by primary/secondary processing, by types of processing (canned, salted etc.) and by size of

firms helps to identify threats for competitiveness as well as sources of value for European industries. A closer look at segment composition and evolution contributes to anticipate future market trends as products with growing competition or possible niches. This type of analysis also allows for regional comparisons of the structure and composition of the processing sector.

A development of appropriate performance indicators for disaggregated segments would help to identify the efficiency and competitiveness of European processing industries in a comparable way. Calculating productivity indicators for segments that have their inputs well identified would make it possible to relate value to costs and thus evaluate efficiency. Identifying for example revenue obtained from national fleet production would contribute to a better knowledge of the value chain and the use of subsidies. Again, as different countries may work with species alike, regional comparison would be easier.



***for different segments, depending on country: primary/secondary, canery/salting/marinated, small/large firm**

Source: Example of an input/output analysis provided by Leyre Goti

Figure 9.3.1: Possible Input/Output analysis in the future

Examples from Danish data

- Sub branches in Denmark

The Institute of Food and Resource Economics in cooperation with Statistics Denmark divides the processing industry into sub branches based on the commodity production of the firms taken from the Commodity Statistics.

As a criterion for the segmentation the firm's main production of species is identified. The firm is added to a sub branch if the commodity production consists of more than 50% of certain species.

- Cod and flatfish
- Herring and mackerel
- Shrimps and mussels
- Salmonoids
- Mixed industry
- Fishmeal factories

The table below shows the share of different species in each segment.

Table 9.3.1: Main species distributed on sub branches.

	Cod and Flatfish	Mackerel	Herring	Shrimp and Mussels	Salmon	Fish for reduction	Others	Total
Cod and Flatfish	72	0	0	2	1	0	24	100
Herring and Mackerel	0	35	46	1	6	1	9	100
Shrimp and Mollusc	0	0	0	89	0	0	11	100
Salmonoides	3	0	5	0	83	1	9	100
Mixed processing	18	1	10	8	19	0	45	100
Fishmeal and Oil	0	0	0	0	0	100	0	100

Source: Institute of Food and Resource Economics and Statistics Denmark.

From the table it can be seen that the specialization of the firms are high, and that each sub branch are highly dependent on one or a few species. From this segmentation it is possible analyse the effect of reduction in supply of different species or the effect of both price and regulation changes on the sub branch.

From the Commodity Trade Statistics it can also be analysed the degree of processing in each sub branches as shown below.

Table 9.3.2: Degree of processing for each sub branch

	Fresh fillet	Frozen fillet	Smoked, salted and dried	Prepared and preserved	Total
Cod and Flatfish	12	7	16	66	100
Herring and Mackerel	2	1	6	91	100
Shrimp and Mollusc	0	0	0	100	100
Salmonoides	27	3	60	10	100
Mixed processing	19	6	16	59	100
Fishmeal and Oil	0	0	0	100	100

Source: Institute of Food and Resource Economics and Statistics Denmark.

Also on the degree of processing the sub branches are relative homogeneous. If time series data are available on degree of processing analysis of changes in the composition of commodities can be done. This analysis could track changes and developments of the industry or development in certain sub branches.

Regulation 199/2008 – analysis possibilities on future data

Data collected according to regulation 199/2008 is segmented by size of the enterprise rather than species. In this type of data collection the ability to conduct input/output analyses is lost but other possibilities are gained.

Based on this data different types of economic analysis's can be conducted. For example:

Analyses on structural differences can be carried out with this type of data. If longer time series of data exist it could be used to analyse the development in turnover, value added, productivity, efficiency etc. It can also be used to analyse the difference in development between firm sizes to see which firm size has shown the largest development in number of firms, FTE and efficiency/productivity measures such as turnover/firm, turnover/FTE, value added/FTE etc.

Analysis possibilities based on both regulations

There are possibilities for analysis's that can be carried independent on which regulation that regulates the data collection. For example:

If data is available on a national regional level it can be used to compare the relative development between national regions. Comparisons can be made in the relative share of the total turnover, number of firms, relative share of employment, productivity etc. This can also be done in a cross country context on a European or Supraregion level to display differences in turnover, productivity. If time series exist changes in relative shares of the total can be compared over time on turnover, employment, productivity etc.

Investment data could be used for analysing the development of the industry in terms of future development and important regions. In order to see if large investments has an effect in changes of the concentration/location of the industry.

Social economy analysis's are also important in order to see how social patterns change as the structure of the processing industry changes due to changes in taxes, fleet size, TAC changes, species etc. Data that can be used for this kind of analysis's be would wage levels, gender distribution, regional dependency on the industry itself, age distribution of the employees etc.

Examples from Swedish data

Data on the Swedish fish processing industry that is segmented by size enterprise rather than segmented by species is available from 2001 to 2007 making possible to analyse changes in structure over time. Below are examples of different kind of analysis's that can be carried out with this type of data based on data from 2001 to 2006.

Over time the number of enterprises changes and while it is interesting to study the change in total it is also interesting to study the relative changes between the sizes of the enterprises. For instance the number of fish processing firms in Sweden grew from 177 to 208 from 2001 to 2006 but the growth is not evenly distributed over the different firm sizes. Firms that have zero FTE are a special case where the owners economy and firms economy is not separated and legally the owner is not employed in the firm itself. However this segment has shown the largest increase in absolute number of firms which is interesting since it is firms dealing with small scale fish processing and may have an important impact on local economies. On overall the smaller enterprises have displayed a larger increase in absolute numbers than larger enterprises

Table 9.3.3: Number of Swedish fish processing firms in Sweden 2001-2006 segmented into different size classes

Number of FTE	2001	2002	2003	2004	2005	2006	Change 2000-2006
0	72	74	83	98	100	95	23
1-4	47	42	54	50	50	52	5
5-9	22	24	23	23	27	24	2
10-19	15	13	15	17	14	21	6
20-49	16	15	11	14	13	9	- 7
50-	5	5	5	5	7	7	2
Total	177	173	191	207	211	208	31

Source: Statistics Sweden

The same kind of structural analysis can be carried out on the net turnover per firm and compare the relative changes between the sizes of the enterprises. From 2001 to 2006 the overall change in the net turnover per firm for the whole sector was practically zero. What is interesting is that smaller businesses have displayed a large increase in net turnover while the largest firms have seen a reduction in net turnover per FTE. This says something about the dynamics of the sector, at a first glance at the totals it may look like nothing has happened over time but by breaking it down in to group structural changes are revealed.

Table 9.3.4: Net turnover/firm in the Swedish processing industry 2001-2006 segmented into different size classes, fixed prices in 1000 €

Number of FTE	2001	2002	2003	2004	2005	2006	Change 2001-2006
0	153	169	181	180	197	246	61 %
1-4	372	418	455	623	384	582	57 %
5-9	1 386	1 087	1 256	1 256	1 530	1 726	25 %
10-19	4 313	4 310	4 382	3 586	3 908	4 860	13 %
20-49	7 714	9 302	9 324	9 406	8 252	10 234	33 %
50-	39 950	44 082	41 053	39 743	31 276	33 737	-16 %
Total	2525	2729	2314	2266	2158	2526	0%

Source: Statistics Sweden

Value added per FTE is an interesting measure because it says something about the efficiency of the firms and the labour. Value added per FTE grew with 9 % in the whole sector from 2001 to 2006. A similar pattern is revealed here as in the tables above, it is smaller enterprises that has displayed a larger increase in value added per FTE rather than larger enterprises.

Table 9.3.5: Value added/FTE in the Swedish fish processing industry 2001-2006 segmented into different size classes, fixed prices in 1000 €

Number of FTE	2001	2002	2003	2004	2005	2006	Change 2001-2006
0	18	22	16	16	23	27	47 %
1-4	37	39	42	55	40	50	35 %
5-9	47	42	42	36	42	61	31 %
10-19	57	57	52	57	52	65	15 %
20-49	52	59	60	54	51	51	- 1 %
50-	58	63	58	68	60	65	13 %
Total	55	59	53	57	53	60	9 %

Source: Statistics Sweden

9.3 Analysis of cost structures/vulnerabilities

These points of the TOR were addressed under drivers of change and some of the national chapters. A deeper analysis may be possible at the second meeting when the analysis of the data does not need that much time anymore because of an agreed common method now.

10. Conclusions

The fish processing industry is an important driver to accomplish the basic aims of the Common Fisheries Policy: the sustainable use of marine resources. Since 2006 Member States have to collect data on the industry. The data call for this meeting asked for the 2006 and 2007 data. It was obvious that this first meeting could only be a starting point. One or more follow up meetings are necessary.

This first report contains now results from the first two years of data collection. For the years from 2009 on a different framework for data collection will lead to some changes in the data and possibly will make it impossible to compare results with the first three years.

A problem raised during the SGECA 09-03 was that there was room for error and misunderstandings in regulation 1639/2001 concerning the parameters collected under the DCR. There also exists a large variation in which parameters that were reported and the level of detail in the data. The heterogeneity in parameters that where collected and reported undermines the possibilities to conducts analysis's on larger scale and on an EU level.

SGECA 09-03, therefore, stresses the importance that the MS follow the guidelines for data collection under the DCF provided by SGECA 08-01. Further SGECA 09-03 stresses, that MS shall follow the specifications in regulation 199/2008 in order to be able to use the data for analysis purposes. Member states shall also harmonize the data collection using the Prodcom systematic. There are many differences how to interpret several categories.

This time the meeting needed a lot of time to decide on a common structure of the national chapters and the calculation of indicators. For the next meeting the group will be able to work more on other aspects like the dependency on landings of the EU fleet or regional analysis. However, especially the dependency question is not easy to answer because of the change in the DCF not to collect data on raw material anymore. It seems necessary to take the fish market (raw and processed products) more into account and the results of a project following the call for tenders on a market observatory system may be a starting point for that.

Many countries have problems collecting data on Raw material going into the processing industry. Instead the national Commodity Trade Statistics can be used to identify species and quantities going into the industry. The commodity trade statistics can be used to segment the industry both on species (produced products) and degree of processing (fresh, fillet, prepared and preserved etc.). Furthermore the Commodity Trade Statistics is also collected and reported for Eurostat and is already harmonized between countries.

A recommendation for future studies could be the use of the commodity trade statistics for segmentation of the European fish processing industry, and a study concerning the conversion factors for calculation of raw material going into the fish processing industry based on the commodity trade statistics.

The participants of the SGECA meeting also discussed the possibility of spatial economic analysis or the analysis of possible clusters in the industry. Such an analysis is not possible with the collected data and also not with the data in upcoming years. The EU Commission may consider a study to show the usefulness of such an approach. Additionally, a change in the regulation for the data collection framework after 2014 may allow for such an analysis. If the CFP will move to a more regional management approach this will be a good complementation from the processing industries side.

11. Appendix

Appendix I Declarations of Experts

Declarations of invited experts are published on the STECF web site on https://stecf.jrc.ec.europa.eu/home together with the final report.

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Appendix III: Data

1. Belgium

Reference year	2006		2007	
Income				
Income from products and services	186083.1	kEuro	393494.9	kEuro
Other income	7470.1	kEuro	6931.0	kEuro
Production costs				
Staff costs: Wages and salaries	7806.5	kEuro	24078.2	kEuro
Staff costs: Social security costs	2869.4	kEuro	8953.6	kEuro
Energy costs	858.7	kEuro	5048.2	kEuro
Purchase of raw materials	114144.3	kEuro	266631.6	kEuro
Packaging	8249.6	kEuro	6693.6	kEuro
Other production costs	13416.7	kEuro	37384.7	kEuro
Details on purchase of raw material				
Fisheries products of Belgian origin		ton	2463.5	ton
Fisheries products of foreign origin, EU		ton	10063.6	ton
Fisheries products of foreign origin, non-EU		ton	6573.1	ton
Aquaculture products of Belgian origin		ton	228.8	ton
Aquaculture products of foreign origin, EU		ton	4135.4	ton
Aquaculture products of foreign origin, non-EU		ton	1916.7	ton
Fisheries products of Belgian origin	6482.0	kEuro	12363.4	kEuro
Fisheries products of foreign origin, EU	18258.2	kEuro	67065.3	kEuro
Fisheries products of foreign origin, non-EU	3893.1	kEuro	46771.0	kEuro
Aquaculture products of Belgian origin		kEuro	31628.9	kEuro
Aquaculture products of foreign origin, EU		kEuro	28892.1	kEuro
Aquaculture products of foreign origin, non-EU		kEuro	10063.0	kEuro
Fixed costs				
Depreciation	2616.185	kEuro	6853.9	kEuro
Financial costs, net	813.882	kEuro	6457.6	kEuro
Exceptional costs	42.03	kEuro	2496.4	kEuro
Taxes				
VAT	2697.29	kEuro	-409.2	kEuro
Taxes, other than VAT	1093.715	kEuro	4108.7	kEuro
Profits				
Profit for the financial year	-1657.27	kEuro	14372.6	kEuro
Investments				
Gross investments in tangible goods	22115.83	kEuro	6037.4	kEuro
Financial position				
Net capital	4693.9	kEuro	50845.4	kEuro
Debts	13563.8	kEuro	169921.9	kEuro
Balance sheet total - Assets	83072.8	kEuro	286677.2	kEuro
Balance sheet total - Liabilities	83272.8	kEuro	294167.8	kEuro
Employment				
Number of employees (average over the year)	504.2		1082.5	
Number of full-time equivalents (average over the year)	443.4		993.4	
** of which labourers and technicians	368.8		681.8	
** of which administrative personnel	72.3		309.0	
** of which management	14.5		24.0	

** of which other personnel categories	12.0		13.6	

Volume and value of the end products according to the PRODCOM classification Only end products derived from fisheries and aquaculture products !		Volume		Value	
15.20.11	**Fish, fish fillets, other fish meat, fish livers and roes, fresh or chilled**	6100.6	ton	56800.1	kEuro
15.20.11.30	Fresh or chilled fish livers and roes	0.6	ton	0.0	kEuro
15.20.11.90	Fresh or chilled fish fillets and other fish meat without bones	6100.0	ton	56800.1	kEuro
15.20.12	**Fish, fish fillets, other fish meat, fish livers and roes, frozen**	8044.4	ton	59242.0	kEuro
15.20.12.10	Frozen whole salt water fish	1528.2	ton	11976.4	kEuro
15.20.12.30	Frozen whole fresh water fish	1.7	ton	7.8	kEuro
15.20.12.50	Frozen fish livers and roes	0.0	ton	0.0	kEuro
15.20.12.70	Frozen fish fillets	6514.5	ton	47257.8	kEuro
15.20.12.90	Frozen fish meat without bones (excluding fillets)	0.0	ton	0.0	kEuro
15.20.13	**Fish, dried, salted or in brine; smoked fish; meal, powder or pellets of fish fit for human consumption**	591.7	ton	5474.8	kEuro
15.20.13.10	Flours, meals and pellets of fish, fit for human consumption; fish livers and roes, dried, smoked, salted or in brine	0.0	ton	0.0	kEuro
15.20.13.30	Fish fillets, dried, salted or in brine, but not smoked	0.0	ton	0.0	kEuro
15.20.13.53	Smoked salmon (including fillets)	463.2	ton	5055.6	kEuro
15.20.13.55	Smoked herring (including fillets)	0.0	ton	0.0	kEuro
15.20.13.59	Other smoked fish (including fillets)	128.5	ton	419.3	kEuro
15.20.13.70	Dried fish, salted fish, fish in brine, but excluding fillets	0.0	ton	0.0	kEuro
15.20.14	**Fish, otherwise prepared or preserved; caviar and caviar substitutes from fish eggs**	4836.2	ton	24604.0	kEuro
15.20.14.11	Prepared or preserved salmon, whole or in pieces but not minced	226.0	ton	1884.0	kEuro
15.20.14.12	Prepared or preserved herring, whole or in pieces but not minced	142.0	ton	743.0	kEuro
15.20.14.13	Prepared or preserved sardines, sardinella, brisling and sprat, whole or in pieces but not minced	0.0	ton	0.0	kEuro
15.20.14.14	Prepared or preserved tuna, skipjack and bonito, whole or in pieces but not minced	474.0	ton	2268.0	kEuro
15.20.14.15	Prepared or preserved mackerel, whole or in pieces but not minced	0.0	ton	0.0	kEuro
15.20.14.16	Prepared or preserved anchovies, whole or in pieces but not minced	0.0	ton	0.0	kEuro
15.20.14.17	Fish fillets in batter or breadcrumbs, including fish fingers	0.0	ton	0.0	kEuro
15.20.14.19	Other prepared or preserved fish, but excluding fish fingers	1526.2	ton	7716.0	kEuro
15.20.14.30	Other preparations of fish	2468.0	ton	11993.0	kEuro
15.20.14.51	Caviar (sturgeon roe)	0.0	ton	0.0	kEuro
15.20.14.59	Caviar substitutes	0.0	ton	0.0	kEuro
15.20.15	**Crustaceans, frozen; molluscs and other aquatic invertebrates, frozen, dried, salted or in brine**	7812.0	ton	38695.0	kEuro
15.20.15.30	Frozen crustaceans	7200.0	ton	35174.0	kEuro
15.20.15.53	Scallops and mussels, frozen, dried, salted or in brine	585.0	ton	3349.0	kEuro
15.20.15.59	Other aquatic invertebrates, frozen, dried, salted or in brine	27.0	ton	172.0	kEuro
15.20.16	**Other prepared and preserved products of crustaceans, mollusks and other aquatic invertebrates**	5195.1	ton	30677.3	kEuro
15.20.17	**Flours, meals and pellets of fish, crustaceans, mollusks and other aquatic invertebrates, unfit for human consumption**	0.0	ton	0.0	kEuro
15.20.18	**Other inedible products of fish, crustaceans, mollusks and other aquatic invertebrates**	61.3	ton	0.0	kEuro

2. Bulgaria

	2006				
Product group name	Production (tones)	Producer value without VAT per tone in leva	Producer value without VAT per tone in euro	Sales tons (total)	Producer value without VAT (total) in euro
Liver, spawn and fish sperm: fresh or chilled	76	3421.05	1749.16	76	132936
Fillet and other fish meat: fresh or chilled	112	6116.07	3127.10	112	350235
Marine fish: frozen	1814	1750.14	894.83	1813	1622331
Freshwater fish: frozen	376	6828.04	3491.12	378	1319644
Fish fillet: frozen	568	4600.37	2352.13	543	1277208
Other fish meat: frozen	126	4584.75	2344.15	118	276609
Fish fillet: dried, salted, in souse, but not smoked	53	13755.10	7032.87	49	344611
Pacific salmon, Atlantic salmon and Danube trout: smoked (including fillets)	174	14104.05	7211.29	173	1247553
Herring: smoked (including fillets)	31	3259.26	1666.43	27	44994
Other fishes: smoked (including fillet)	295	5833.88	2982.82	307	915724
Fish: dried ot salted	60	3796.88	1941.31	64	124244
Prepared food and tinned fish from salmon, whole or in pieces (excluding dround fish)	91	11662.92	5963.16	89	530721
Prepared food and tinned fish from herring, whole or in pieces (excluding dround fish)	272	5015.15	2564.21	264	676950
Prepared food and tinned fish from pilchard or sprat, whole or in pieces (excluding dround fish)	471	2941.56	1504.00	462	694846
Prepared food and tinned fish from tuna, fishes with furrowed abdomen, whole or in pieces (excluding dround fish)	71	4382.35	2240.66	68	152365
Prepared food and tinned fish from mackerel, whole or in pieces (excluding dround fish)	2191	3779.91	1932.64	2137	4130355
Other prepared food or tinned fish (excluding sea stars)	17	4941.18	2526.39	17	42949
Other prepared food and tinned fish	125	4163.93	2128.98	122	259736
Cavair (from Sturgeon)	0.62	1088709.68	556648.42	0.62	345122.02
Other roe (excluding cavair)	113	4449.53	2275.01	113	256484
Crayfishes: flour, semolina and granulated agglomerates fit for human consumption: frozen	99	7090.91	3625.52	99	358927
Mussels(Pecten, Perna and Mytilus): frozen, dried or salted	4	8250.00	4218.16	4	16873
Aquatic invertebrates: flour, semolina and granulated agglomerates, frozen, dried or salted, fit for human consumption	464	7625.27	3898.74	459	1789521
Crayfishes, Mussels an other aquatic invertebrates prepared or tinned	1551	7751.59	3963.33	1256	4977936
Other fish products, Crayfishes, Mussels an other aquatic invertebrates; fish discard unfit for human consumption	12	666.67	340.86	12	4090

	2007				
Product group name	Production (tones)	Producer value without VAT per tone in leva	Producer value without VAT per tone in euro	Sales tons (total)	Producer value without VAT (total) in euro
Liver, spawn and fish sperm: fresh or chilled	52	3923.08	2005.84	52	104304
Fillet and other fish meat: fresh or chilled	74	5175.68	2646.28	74	195825
Marine fish: frozen	2844	1787.80	914.09	2705	2472607
Freshwater fish: frozen	704	6837.27	3495.84	719	2513509
Fish fillet: frozen	598	4914.82	2512.91	587	1475077
Other fish meat: frozen	106	2989.69	1528.60	97	148275
Fish fillet: dried, salted, in souse, but not smoked	39	7025.64	3592.15	39	140094
Pacific salmon, Atlantic salmon and Danube trout: smoked (including fillets)	43	18625.00	9522.81	40	380912
Herring: smoked (including fillets)	110	4709.19	2407.77	107	256668
Other fishes: smoked (including fillet)	387	6774.19	3463.59	403	1395826
Fish: dried ot salted	101	3793.48	1939.58	92	178441
Prepared food and tinned fish from salmon, whole or in pieces (excluding dround fish)	16	6312.50	3227.53	16	51640
Prepared food and tinned fish from herring, whole or in pieces (excluding dround fish)	251	5282.87	2701.09	251	677973
Prepared food and tinned fish from pilchard or sprat, whole or in pieces (excluding dround fish)	764	2456.14	1255.80	741	930551
Prepared food and tinned fish from tuna, fishes with furrowed abdomen, whole or in pieces (excluding dround fish)	73	6753.85	3453.19	65	224457
Prepared food and tinned fish from mackerel, whole or in pieces (excluding dround fish)	2273	4232.37	2163.98	2101	4545952
Other prepared food or tinned fish (excluding sea stars)	122	4540.98	2321.77	122	283255
Other prepared food and tinned fish	96	4440.00	2270.14	100	227014
Cavair (from Sturgeon)	0.32	1118750.00	572007.79	0.32	183042.49
Other roe (excluding cavair)	64	3862.50	1974.86	63	124239
Crayfishes: flour, semolina and granulated agglomerates fit for human consumption: frozen	66	7854.84	4016.12	62	248999
Mussels(Pecten, Perna and Mytilus): frozen, dried or salted	4	7500.00	3834.69	4	15339
Aquatic invertebrates: flour, semolina and granulated agglomerates, frozen, dried or salted, fit for human consumption	546	5816.99	2974.18	536	1592673
Crayfishes, Mussels an other aquatic invertebrates prepared or tinned	1750	6429.54	3287.37	1334	4385354

Production	Value (2006), EUR	Value (2007), EUR
Ocean mackerel, whole, frozen, kg	1.84	1.87
Ocean cod, gutted frozen, kg	2.37	2.45
Fish in souse, sprat	2.99	3.28
Tinned sprat, 160 g	0.42	0.43

3. Cyprus

	2006	2007	Units
Number of Enterprises	25	25	
Raw material- Total	215507846.00	251401223.00	Kg
Income (turnover)- Total	13775210.42	12262720.00	Cyprus pounds
Production costs – Total	6237956.25	9074770.00	Cyprus pounds
Labour	75000.00	139130.00	Cyprus pounds
Energy	265927.08	240120.00	Cyprus pounds
Packaging	2011331.25	268207.50	Cyprus pounds
Other running costs	733143.75	518920.00	Cyprus pounds

4. Denmark

Basic indicators (in 1000 EUR):

	2006	2007
Number of enterprises	124	128
Employment (FTE)	4414	4428
Operating result:		
+ Income	2047641	1891183
+ Other income	54759	55415
- Labour	-196915	-203081
- Energy	-40447	-35459
- Raw material (1+2)	-1440049	-1336619
1- Raw material	-1365212	-1267161
2 - Packaging	-74837	-69458
- Other running costs (3+4)	-379806	-351970
3 - Running costs	-175237	-144162
4 - Resale commodities	-204569	-207808
- Depreciation	-33565	-35152
- Financial costs, net	-24396	-15200
- Extraordinary costs, net	2102	197
- Tax	-6039	-5166
Net profit	-16714	-35852
Financial position	21%	20%
+ Total fixed assets	377082	448880
+ Total current assets	754695	780827
Investments (assets)	1131778	1229707
+ Net capital	241974	249772
+ Provisions	11890	8670
+ Long-term debt	183833	196828
+ Short-term debt	694081	774438
Total liabilities	1131778	1229707
Investment	59993	70378
Sales	-37291	-6799
Investment, net	22702	63579
Raw material (Volume)	NA	NA
Capacity utilization	NA	NA

Production:

	2006			2007		
Commodity	**Value 1000 EURO**	**Ton**	**Price Euro**	**Value 1000 EURO**	**Ton**	**Price Euro**
0202209000	389	136	2.86	390	135	2.90
0203221100	2233	631	3.54	1434	520	2.76
0207139900	257	4599	0.06	22	132	0.16
0207147000	3916	948	4.13	2646	619	4.27
0302112000	2040	650	3.14	1598	653	2.45
0302118000	5533	1379	4.01	5393	1176	4.59
0302120000	19713	2617	7.53	21512	3317	6.48
0302211000	353	66	5.30	238	39	6.09
0302213000	35	2	14.35	40	3	15.31
0302220000	229	52	4.41	392	88	4.46
0302230000	60	3	17.28	60	3	18.73
0302299000	44	5	8.33	44	5	9.11
0302329000	13	2	7.48			
0302361000	25	3	7.52	522	1178	0.44
0302400000	1930	2922	0.66	2097	2863	0.73
0302501000	12310	2673	4.61	12889	2329	5.53
0302620000	85	21	3.97	63	14	4.54
0302630000	367	129	2.84	114	40	2.87
0302640000	224	117	1.91	1240	871	1.42
0302652000	467	55	8.43	194	21	9.19
0302660000	5	0	18.59	2	0	20.59
0302691900	20	4	5.10	12	2	5.93
0302693100	461	199	2.31	441	188	2.35
0302694100	0	0	1.95	1	0	2.93
0302695100	36	67	0.54	45	65	0.70
0302696100	546	96	5.71	728	120	6.07
0302696800	6	1	5.69	7	1	5.71
0302698100	337	29	11.59	103	11	9.04
0302699900	850	203	4.20	631	183	3.44
0302700000	1639	168	9.75	685	97	7.10
0303212000	2003	680	2.95			
0303213000				4008	1472	2.72
0303218000	5008	1215	4.12	5241	1153	4.54
0303220000	14122	2289	6.17	15958	3907	4.08
0303311000	439	424	1.04	933	335	2.78
0303320000	51	29	1.77			
0303397000	186	29	6.44			
0303500000	432	938	0.46			
0303510000				270	282	0.96
0303529000				1802	530	3.40
0303601100	1	1	1.73			
0303718000				10	9	1.14
0303743000	1215	660	1.84	1091	545	2.00
0303760000	157	7	21.68	87	6	15.15
0303793500	454	44	10.35			
0303798100	119	53	2.23	15	2	7.77
0303799800	542	85	6.40			
0303809000	5361	1446	3.71	6098	1178	5.17
0304111000				24	3	8.75
0304101300	17125	2023	8.46	18387	2373	7.75
0304101500	557	142	3.92	116	20	5.81

0304101700	988	106	9.35	544	83	6.55
0304101900	1336	138	9.67	287	39	7.29
0304103100	33892	4185	8.10	28340	3087	9.18
0304103300	9106	2987	3.05	8347	2416	3.45
0304193500				64	5	12.68
0304103800	34070	24058	1.42			
0304193900				17870	10107	1.77
0304109100	3	3	1.00			
0304109700	17390	17228	1.01	9033	9656	0.94
0304109800	5580	1712	3.26			
0304199900				4397	826	5.33
0304201300	3143	479	6.56			
0304201500	0	0	1.45			
0304201700	227	45	5.09			
0304202100	56	9	5.89			
0304202900	12995	2336	5.56			
0304203100	2287	823	2.78			
0304203300	2485	494	5.03			
0304203500	58	11	5.50			
0304204500	199	43	4.67			
0304205300	721	159	4.53			
0304205800	34	15	2.33			
0304207100	3842	560	6.87			
0304207300	67	13	4.98			
0304207500	1604	1287	1.25			
0304208500	919	371	2.48			
0304209100	9	2	4.79			
0304209400	8755	1107	7.91			
0304291300				3970	610	6.51
0304291500				156	22	7.00
0304291700				90	18	5.03
0304292900				13252	2034	6.52
0304293100				1032	397	2.60
0304293300				49	4	11.93
0304293500				0	0	6.72
0304295300				1116	292	3.83
0304297100				3581	449	7.98
0304297300				39	5	7.84
0304297500				2302	2079	1.11
0304298500				369	121	3.04
0304299100				7	3	2.07
0304299900				6462	873	7.40
0304901000	432	144	3.00			
0304902200	5146	5407	0.95			
0304903800	412	250	1.65			
0304903900	31	11	2.84			
0304904100	290	231	1.25			
0304904500	162	56	2.91			
0304909700	460	274	1.68			
0304992100				0	1	0.20
0304992300				4051	4644	0.87
0304993300				204	68	3.01
0304993900				1414	258	5.47
0304994100				19	15	1.25
0304994500				238	44	5.42
0304999900				724	280	2.58
0305200000	385	147	2.61	404	37	10.84

0305301100	33295	5199	6.40	26172	3919	6.68
0305301900	7975	1398	5.70	7416	1206	6.15
0305303000	3	5	0.60			
0305309000	277	55	5.01	215	48	4.49
0305410000	88272	8690	10.16	95076	9010	10.55
0305420000	368	53	7.01	229	39	5.80
0305491000	7029	523	13.43	9473	716	13.23
0305493000	915	119	7.68	938	145	6.46
0305494500	48545	4847	10.02	53499	5329	10.04
0305495000	6109	323	18.91	5306	273	19.46
0305498000	3419	487	7.01	2675	230	11.64
0305610000	8495	4508	1.88	7935	3755	2.11
0305620000	31	9	3.46			
0305695000	1	2	0.26			
0306121000	5684	540	10.53	6639	596	11.14
0306129000	400	33	12.26	222	25	8.93
0306131000	3739	2158	1.73	83	37	2.27
0306135000	72	5	14.20	270	19	14.38
0306193000	2568	266	9.65	7834	705	11.12
0306199000	8	9	0.96	2	2	1.00
0306229100	13	0	30.62	7	0	30.60
0306231000	21	5	4.22	1	0	6.11
0306243000	144	39	3.70	125	26	4.79
0306248000	1	0	6.37	14	1	18.45
0306291000	687	74	9.29	1957	202	9.69
0306293000	16067	1445	11.12	6805	525	12.96
0306299000	206	23	8.86	341	56	6.07
0307101000	451	73	6.22	165	23	7.17
0307109000	1278	183	6.99	4906	744	6.59
0307291000	472	88	5.38	392	69	5.71
0307311000	1457	561	2.60	3465	1771	1.96
0307391000	1623	583	2.78	171	60	2.87
0307490100	28	8	3.71	11	2	6.17
0307600000	12	19	0.64	7	11	0.67
0307910000	510	63	8.14	24	4	6.18
0307991800	1	0	3.48	0	0	4.98
0408198900	272	53	5.16	295	54	5.43
0511911001	2005	12568	0.16	1776	9390	0.19
0511911009	21289	144114	0.15	17036	123926	0.14
0703109000	0	0	1.83			
0910999900	1	0	6.23	7	1	5.99
1101009000				8	8	0.91
1504209000	65033	106575	0.61	75274	119415	0.63
1604110000	3392	239	14.21	2914	239	12.20
1604129101	355	270	1.32	298	103	2.90
1604129102	11733	2688	4.36	10680	2283	4.68
1604129103	168	21	7.97	176	22	8.05
1604129109	1441	329	4.39	1373	319	4.30
1604129902	410	206	1.99	689	404	1.70
1604129903	41992	18397	2.28	49664	22057	2.25
1604129905	23711	14241	1.66	17403	10601	1.64
1604129909	11642	6884	1.69	9790	4855	2.02
1604139000	1006	791	1.27	985	900	1.09
1604141600				539	93	5.82
1604149000				4	5	0.90
1604151100				59193	13680	4.33
1604151101	65677	14812	4.43			

1604160000	241	171	1.41	35	24	1.46
1604191000	4	1	5.65			
1604199100	91296	21710	4.21	101722	22649	4.49
1604199200	18	3	5.94			
1604199300	321	87	3.70	301	71	4.25
1604199500	4538	1271	3.57	3857	814	4.74
1604199800	43476	8673	5.01	40153	7874	5.10
1604200500	2099	390	5.38	2290	489	4.68
1604201000	835	159	5.24	1410	254	5.55
1604205009	3924	1010	3.89	8719	2312	3.77
1604207000	4	1	7.25			
1604209000	18543	6421	2.89	31775	8951	3.55
1604309000	19807	3462	5.72	8410	939	8.95
1605100000	61	12	5.02	450	90	5.02
1605201009	43834	5957	7.36	43057	4855	8.87
1605209101	12	2	7.35	3326	303	10.96
1605209109	52278	7942	6.58	41449	6133	6.76
1605209909	25530	4822	5.30	13875	2690	5.16
1605400000	16835	1774	9.49	13536	1369	9.89
1605901100	12191	2735	4.46	10381	3578	2.90
1605901900	11255	4476	2.51	4793	1823	2.63
1605909000	224	89	2.52	212	77	2.77
1701129000	1	1	0.71	1	1	0.64
1902209900	87	24	3.64	116	29	3.99
1905409005				12	11	1.15
2001901000	400	144	2.79	573	219	2.61
2001909901	9	2	3.87	9	2	3.87
2103909001	6	2	3.12	13	3	4.10
2103909007				90	22	4.18
2104109000	1799	964	1.86	1999	1035	1.93
2301200000	254719	286534	0.89	181645	175419	1.04
2309909906	4235	16172	0.26			
2309909907				5465	19904	0.27
2501009100	1	6	0.13	1	4	0.13
4819100000				3	3	0.81

5. Estonia

TYPE	2006	2007	UNIT
Raw Material (Total)	85000	75000	Tonnes
Income (Total)	112074956	104219064	EUR
Production Cost (Total)	107967673	97928368	EUR
-- Labour	15420730	17465008	EUR
-- Other Running Costs	92546943	80463359	EUR
Fixed Costs	5001470	5133575	EUR
Financial Position	0.75	0.82	
Investment (Asset)			
-- Replacement	30933238	35790523	EUR
Employment	2370	2103	FTE
Number Of Enterprises	55	57	

6. Finland

	2006	2007
Income (turnover)	134.0	149.8
Production costs		
Labour	19.7	22.4
Energy	2.4	2.0
Raw material	75.2	78.7
Packaging	5.2	6.1
Other running costs	22.4	34.3
Fixed costs	4.8	6.3
Financial position	34%	23%
Investments (assets)	74,677	67,610
Employment		
-number	831	908
- FTE (2000)	687	756
Capacity utilisation		
Number of enterprices	126	147

Raw material (in tones):

Baltic herring	30134
Rainbow trout	20064
Salmon	13998
Herring	4962
European whitefish	2245
Vendace	910
Perch	415
Pikeperch	341
Redfish	322
Pike	298
Mackerel	137
Char	87
Saith	69
Cod	64
Other	182
Total	74229

7. France

Type	2006	2007	UNIT
Employment	23,821	23,240	EURO
Income (Turnover)	4,379,814,281	4,345,954,835	EURO
Raw Cost	1,654,967,897	1,472,531,238	EURO
Amortissement	112,980,269	117,446,739	EURO
Capital Value	1,436,683,198	1,469,612,288	EURO
Debt	1,220,822,294	1,185,560,806	EURO

8. Germany

Indicators	2006	2007	Units and comments
Income and Additional Information			
Turnover	2038794	2301246	in 1000 Euro
Gross production value	2112786	2071475	in 1000 Euro
Material consumption, commodity, hired labour	1457047	1396928	in 1000 Euro
Net production value	655739	674547	in 1000 Euro
Other intermediate inputs	289822	287935	in 1000 Euro
Gross value added	365917	386612	in 1000 Euro
Other indirect taxes minus subsidies	9706	15051	in 1000 Euro
Gross value added at factor cost	356211	371561	in 1000 Euro
Depreciation	46906	53326	in 1000 Euro
Net value added at factor cost	309305	318235	in 1000 Euro
Gross value of income from dependent employment	275958	261390	in 1000 Euro
Production costs (Production cost category are based on sampling, with a standard error below 5 %)			
Labour (incl. Agency worker, incl. social insurance cost)	293,542	279900	in 1000 Euro
Energy	35403	39236	in 1000 Euro
Raw Material and Supplies (without Energy, incl. Packaging)	1222256	1251049	in 1000 Euro
Packaging is about 9,3 % of turnover in 2006, estimated from survey, with answers representing 2201,5 FTE			
Commodity	184888	85,427	in 1000 Euro
Other running costs (incl. Insurance, industrial services et al.)	304322	290641	in 1000 Euro
Taxes on Cost items	10036	15468	in 1000 Euro
Interest on Dept Capital	16681	21376	in 1000 Euro
Total	2067128	1983097	in 1000 Euro
Fixed costs (= depreciation)	46906	53326	
Financial position (Share of own/borrowed capital)	31.224	32.335	Calculated by FTE weighted average (random sampling, representing 2229,2 and 2837 employees; FTE. For enterprises with more than 10 employees.
Investment			
New tangible assets - gross investment	39171	57407	in 1000 Euro (Enterprises with 20 or more employees)
Land and Buildings	11		in 1000 Euro (Enterprises with 20 or more employees)
Proceeds from disposal of tangible assets	1548	3 624	in 1000 Euro (Enterprises with 20 or more employees)
Employment			
Full time	8392	7816	Number (at 30.9.)
Part time	603	567	Number
Hours worked	14,060	14,060	Volume in 1000 h
FTE	8043	6925.1	(38 h per week, 5 days per week, 230 working days)
Capacity utilization	78.117	81.59	Calculation analogue to Financial Position
Number of Enterprises	85	85	with 10 or more employees
Unless otherwise indicated, data from enterprises with more than 10 (2006) or 20 (2007) employees, based on census.			

Income (per product)	2006		2007	
	Value ('000 Euro)	Volume (tn)	Value ('000 Euro)	Volume (tn)
Fresh or cooled:				
Fish Filet and other fish	60156	8728	Confidential	7661
Frozen:				
Marine Fish	21517	4323	8687	2047
Fresh Water Fish	confidential	confidential	confidential	confidential
Fish Filet	160681	58549	160800	57199
Other	7542	1560	10225	1946
Fish dried, salted or in pickle; smoked fish, fish flour, powder and pellets of fishes edible:				
Filet, dried or salted	1187	303	1474	377
Salmon (Atlantic and Pacific and Donau), smoked	144379	12940	111621	10520
Bloated Herring	7961	2400	6254	1703
Other Fish, smoked	52460	5637	51851	5728
Fish, other modes of preparation and preservation; as a whole or in pieces, but not finely hackled:				
Salmon	24869	4626	18769	1926
Herring	224712	77117	257098	83612
Sardines and Sprats	confidential	confidential	confidential	confidential
Tuna and Skipjack	3016	1276	3641	1450
Mackerel	confidential	confidential	confidential	confidential
Fish Filet, Fish Finger rare, only coated with batter, breaded, even pre-baked, frozen	410665	154852	469951	174409
Other Fish (without Fish Finger)	84197	28487	86511	32008
Fish Salad	127977	31120	122617	27469
Fish processed with other modes of preparation and preservation	142071	44959	161103	51204
Caviar surrogate	27720	1561	13536	691
Crustacea, frozen	confidential	confidential	confidential	confidential
Food preparation of crustacea, molluscs et al.	77466	8457	84185	8888
Crustacea, Molluscs et al. prepared or preserved	17760	confidential	16956	2124
Total (incl. confidential data)	1657175	473361	1711299	472600

9. Greece

Production costs

The following percentages were calculated for each cost category in the total production costs:

- 19,3 % labour
- 2,7 % energy
- 63,3 % raw materials
- 9,4 % packaging
- 5,3 % other running costs

Fixed costs

The following percentages were calculated for each cost category in the total of fixed costs.

- 4,1 %, depreciations
- 59,5 %, loan installments
- 28,4 %, administration and disposal costs
- 5,5 %, interest due
- 2,5 % other costs

Financial position: Share of own/borrowed capital

The Share (analogy) of the owners' capital to borrowed capital is 0,44

Investment

In year 2007 the Seafood exploitation industry has invested 9.786.807 € for durable elements (fixed assets).

They did not proceed to any insurance for these investments.

Employment: Number in FTE

In year 2007 the seafood exploitation industry employed total of 2.175 persons (the number calculated in FTE).
Not including self- employment

Capacity utilization

The capacity utilization of the Seafood exploitation industry in year 2007 runs at 41.4 %

Number of Enterprises

In the year 2007, the seafood exploitation industry numbered 160 different enterprises.

Raw materials

	Quantity (tons)	Income (€)
Sardine	4176	8024654
Anchovy	4687	13408076
Hake	4204	12693797
Common dentex	128	756039
Smoothhands	1955	5316646
Red porgy	280	1083954
Red mullet	246	844197
Common Pandora	213	866564
Redfishes	1338	4402736
White grouper	46	196793
Soles	1106	3887156
Combers	1323	5661365
King clip	223	451310
Angler	129	619091
Squid	9730	23380614
Cuttlefish	2272	7223127
Octopus	6633	30672086
Shrimps	1373	9375545
Lobsters	145	2026209
Trouts	1169	3626490
Mussels	2035	4933376
Tunas	874	6012237
Atlantic mackerel	1579	5749712
Pangasius	180	613200
Surimi	26	201280
Round sardinella	362	151179
Salmons	607	1496450
Musky octopus	1123	4171800
Broadtail squid	800	2370555
Pink shrimps	1207	8311032
Swordfish	86	496013
Chub mackerel	306	779478
Herring	504	1296895
Grey mullets	4	77500
Atlantic bonito	21	173977
European eel	567	680100
Other	6610	14624944
Total	**58265**	**186719177**

Production

Species	**Value (€) per ton**
Sardine	2149 €
Anchovy	3027 €
Hake	3086 €
Common dentex	5861 €
Smoothhands	2854 €
Red porgy	3650 €
Red mullet	3532 €
Common Pandora	4207 €
Redfishes	3356 €
White grouper	4577 €
Soles	3613 €
Combers	4175 €
King clip	2119 €
Angler	8972 €
Squid	2485 €
Cuttlefish	3378 €
Octopus	4805 €
Shrimps	6899 €
Lobsters	14683 €
Trouts	4691 €
Mussels	2441 €
Tunas	8676 €
Atlantic mackerel	5256 €
Pangasius	3407 €
Surimi	8387 €
Round sardinella	436 €
Salmons	3164 €
Musky octopus	3810 €
Broadtail squid	3441 €
Pink shrimps	8156 €
Swordfish	6442 €
Chub mackerel	3957 €
Herring	3803 €
Grey mullets	12917 €
Atlantic bonito	15816 €
European eel	2173 €
Other	2402 €
Total	**3512 €**

10. Italy

Data type	2006	2007	Units
Income (turnover)	3,114,821,783	3,152,921,558	Euro
Raw material costs	2,246,012,451	2,242,747,057	Euro
Labour costs	227,182,149	235,074,115	Euro
Energy costs	146,580,968	150,597,384	Euro
Fixed costs (depreciation)	63,442,637	60,841,430	Euro
Other running costs	396,092,634	401,388,621	Euro
Investment (assets)	2,059,458,792	2,182,966,900	Euro
Financial position	0.26	0.27	Ratio
Number of enterprises	372	372	Number
Employment	7750	7750	Number

Species	Status of raw material	2006	2007	Unit
ANE	fresh	100,507	102,969	TONS
ANE	semifinished	31,575	32,348	TONS
CRU	fresh	8,151	8,351	TONS
CRU	semifinished	4,244	4,348	TONS
CTL	fresh	17,882	18,320	TONS
CTL	semifinished	24,708	25,313	TONS
ELE	fresh	785	804	TONS
FIN	fresh	57,179	58,579	TONS
FIN	semifinished	9,786	10,026	TONS
HKE	fresh	18	18	TONS
HKE	semifinished	8,947	9,166	TONS
MOL	fresh	13,118	13,439	TONS
MOL	semifinished	26,236	26,878	TONS
MSM	fresh	25,148	25,764	TONS
MSM	semifinished	3,155	3,233	TONS
MTS	fresh	189	193	TONS
PIL	fresh	10,359	10,613	TONS
PIL	semifinished	2,319	2,375	TONS
SVE	fresh	16,329	16,729	TONS
SVE	semifinished	10,927	11,195	TONS
SWO	fresh	1,096	1,123	TONS
SWO	semifinished	36	37	TONS
TRO	fresh	7,444	7,626	TONS
YFT	fresh	12,754	13,067	TONS
YFT	semifinished	86,730	88,854	TONS

11. Latvia

Economic information about Latvian fish processing industry	2006	2007
Raw material: Total and per species (tonnes)	No data	No data
Income (turnover): Total and per product (thousand Euro)	163886	167935
Production costs: Total and per category cost (thousand Euro)	174509	171825
• labour (thousand Euro)	23616	23750
• energy (thousand Euro)	8062	7592
• raw material (value) (thousand Euro)	142830	140482
• packaging	No data	No data
• other running costs	No data	No data
Fixed costs: Average costs, calculated from investment (thousand Euro)	63545	72643
Financial position: Share of own/borrowed capital	No data	No data
Investment (asset) (thousand Euro)	40934	46822
• Historical	No data	No data
• Replacement	No data	No data
• Insurance	No data	No data
Prices/product: Value per tonne	No data	No data
Employment: Numbers in FTE	7343	5648
Capacity utilization: Annual average	No data	No data
Number of Enterprises (total)	116	107

12. Lithuania

Indicator	Units	2006		2007	
		< 50 employed	> 50 employed	< 50 employed	> 50 employed
Number of enterprises	Number	21	16	19	17
Raw material:	t	6070	74412	7225	86847
Income (turnover) Total:	EUR	17175306	114178116	14654247	162861506
Production costs:					
• labour	EUR	2929419	22070692	1260433	20746336
• energy	EUR	979607	4608656	539454	1895014
• raw material (value)	EUR	8459371	66650694	10715920	120839184
• packaging	EUR	611576	3142361	313593	3308027
• other running costs	EUR	1044788	11662547	1454971	10903583
Fixed costs: Average costs, calculated from investment	EUR	2255013	10729985	938547	9982310
Investment (asset)					
• Historical	EUR	10878359	89089753	8122252	49784329
Employment:		467	4568	445	4187
Capacity utilization: Annual average		45%	65%	71%	77%

Raw material	Units	2006		2007	
		< 50 employed	> 50 employed	< 50 employed	> 50 employed
Alive and fresh fish	EUR	20385	3175	0	0
Chilled fish products	EUR	3286130	1436035	2230003	629255
Chilled fish products, disemboweled	EUR	3206295	222035	84788	10195
Frozen fish products	EUR	1209554	47501416	1045494	34173889
Frozen fish products, disemboweled	EUR	557107	42533967	623178	27926043
Salted and soused fish products	EUR	3988882	22904800	2845607	25010976
Salted and soused fish products, packed in as small tare	EUR	672466	13740013	320501	4469561
Smoked fish products	EUR	6385751	21528231	3390785	28357514
Smoked fish products, disemboweled	EUR	3678216	19279173	896596	15964055
Aromatized sea products	EUR	0	1909179	0	49851281
Dried and withered fish products	EUR	777746	1973164	426542	1004525
Gastronomic fish products	EUR	1506859	8740222	1269369	17383303
Other fish products	EUR	0	399163	3374194	505745
Canned and preserved fish with oil	EUR	0	2353067	0	2584887
Canned and preserved fish natural	EUR	0	664153	18063	203972
Canned and preserved fish with sauces	EUR	0	1224524	54189	2516920
Canned and preserved fish paste	EUR	0	32205	0	127492
Non alimentary fish products	EUR	0	3508780	0	511747
Total	EUR	17175306	114178116	14654247	162861506

Production prices	Units	2006		2007	
		< 50 employed	> 50 employed	< 50 employed	> 50 employed
Alive and fresh fish	EUR/t	559.0	406.0		
Chilled fish products	EUR/t	3083.0	4239.0	2310.0	4469.0
Chilled fish products, disemboweled	EUR/t	3289.0	3062.0	1878.0	4586.0
Frozen fish products	EUR/t	234.0	3318.0	364.0	3468.0
Frozen fish products, disemboweled	EUR/t	224.0	4281.0	1495.0	4518.0
Salted and soused fish products	EUR/t	1490.0	1453.0	1950.0	1363.0
Salted and soused fish products, packed in as small tare	EUR/t	1391.0	1688.0	1309.0	1159.0
Smoked fish products, disemboweled	EUR/t	2428.0	4074.0	2638.0	4386.0
Smoked fish products	EUR/t	2465.0	3739.0	3019.0	3490.0
Aromatized sea products	EUR/t				1962.0
Dried and withered fish products	EUR/t	1906.0	4827.0	1639.0	951.0
Gastronomic fish products	EUR/t	1110.0	1010.0	1360.0	1334.0
Other fish products	EUR/t		1015.0	12552.0	890.0
Canned and preserved fish with oil	EUR/t		3436.0		2520.0
Canned and preserved fish natural	EUR/t		3077.0	36203.0	3343.0
Canned and preserved fish with sauces	EUR/t		1482.0	2896.0	3725.0
Canned and preserved fish paste	EUR/t		1469.0		1665.0
Non alimentary fish products	EUR/t		471.0		102.0

13. Netherlands

Variable	2006	2007
Companies with ≤ 10 persons	50	57
Companies with 11 - 49 persons	45	51
Companies with 50 - 249 persons	17	16
Companies with ≥ 250 persons	0	0
Total number of companies	112	124
Sample size	52	46
Turnover (€)	799,073,484	756,621,835
Subsidies (€)	15,094,000	2,465,000
Other income (€)	6,220,000	24,918,050
Total income (€)	820,387,484	784,004,885
Wages (€)	117,684,778	105,720,118
Non-paid labour (€)	2,287,070	3,010,398
Total labour cost (€)	119,971,848	108,730,516
Energy costs (€)	9,739,073	13,166,944
Raw material costs (€)	539,443,813	520,654,020
Other costs (€)*	96,221,023	84,854,796
Total costs (€)	765,375,757	727,406,276
Depreciation (€)	22,364,770	16,876,471
Net financial costs (€)	6,122,446	8,790,987
Total capital costs (€)	28,487,216	25,667,458
Net exceptional costs (€)	390,000	-19936000
Total value of the assets (€)	1,323,854,703	1,461,774,356
Net investment (€)	179,495,646	154,796,124
Total debt (€)	777,971,448	922,076,762
Number of employed persons	4151	3723
FTE's	3501	3120
*Other costs include among others: working accommodation, equipment, transportation, sales and communication		

14. Poland

	2006	2007	Units
Number of Enterprises	129	169	
Capacity utilization: Fish processing	78.7	78.3	%
Capacity utilization: Total operating	81.9	80.9	%
FTE	12125.88	14149.13	
Production costs	905791	1045549	1000 EUR
labour	86193	120597	1000 EUR
energy	12563	14855	1000 EUR
raw material	583717	634452	1000 EUR
packaging	76159	86368	1000 EUR
other running costs	147159	189276	1000 EUR
Fixed costs (depreciacion)	19507	25512	1000 EUR
The value of goods and materials sold according to procurement (purchase) prices	86797	149207	1000 EUR
Total operating costs	1012096	1220267	1000 EUR
Own capital	218545.4	316214	1000 EUR
Credits & loans	102534.5	168753.6	1000 EUR
Financial position: share of own/borrowed capital	2.1	1.9	
Investment (asset) Historical	238370.2	357671.6	1000 EUR

Income (in 1000 EUR)	2006	2007
Total income	**1050726.6**	**1276247.1**
Income from sale products (goods and services)	**937169.5**	**1109062.1**
smoked	313847.7	417363.4
frozen	214495.4	218304.5
marinated	175663.8	190516.5
canned	76043.2	117409.4
fresh & chiled	81548.6	42937.2
salted	31341.9	39270.1
other	44228.9	83260.7

Raw material bought for processing (tn)	2006	2007
Herring	91924	104860
Salmon	52737	65015
Cod	44349	40264
Sprat	35196	36214
Mackerel	29432	32683
Alaska pollack	13890	16578
Rainbow trout	5918	11959
Flounder	10940	9802
Pangas catfishes nei	6109	8590
Hake	3631	3298
Haddock	75	2430
Blue grenadiers nei	1212	2361
Other fish	27453	33750
Total	**322866**	**367804**

Raw material provides for inward processing (tn) *	2006	2007
Herring	1361	20301
Northern prawn	7988	10587
Alaska pollack	6863	8788
Sprat	4342	7875
Salmon	50	3630
Blue grenadiers nei	97	1220
Pangas catfishes nei	845	1108
Pike-perch	337	1036
Other fish	6620	5985
Total	**28503**	**60530**

*Processing, treatment or production of goods from raw materials and materials provided by a foreign contractor
The processed, treated or produced commodity remains the property of the sending party and is subject to return. Such transactions are called inward processing for the country in which the processing takes place and outward processing for the country commissioning the commodity for processing abroad.

Product prices

Major species	Type of product		2006	2007	Units
Salmon	smoked	fillets	11330.1	8640.8	EUR/tonnes
Rainbow trout	smoked	fillets	8143.8	5461.7	EUR/tonnes
Cod	fresh	fillets	5696.0	5035.4	EUR/tonnes
Cod	frozen	fillets	4743.5	5203.9	EUR/tonnes
Haddock	frozen	fillets	.	4776.4	EUR/tonnes
Flounder	fresh	fillets	4223.0	3083.4	EUR/tonnes
Mackerel	canned		2727.0	2848.7	EUR/tonnes
Flounder	frozen	fillets	3087.5	2900.8	EUR/tonnes
Alaska pollack	frozen	fillets	2164.5	2516.1	EUR/tonnes
Hake	frozen	fillets	2160.5	2487.6	EUR/tonnes
Pangas catfishes nei	frozen	fillets	2340.7	2304.6	EUR/tonnes
Mackerel	smoked	gutted without head	2283.0	2121.0	EUR/tonnes
Herring	canned		2492.6	2083.6	EUR/tonnes
Herring	marinated	fillets	2034.5	1986.6	EUR/tonnes
Blue grenadiers nei	frozen	fillets	2200.4	1917.6	EUR/tonnes
Herring	marinated	flaps	2182.1	1805.8	EUR/tonnes
Herring	salted	fillets	1971.3	1701.4	EUR/tonnes
Herring	smoked	gutted without head	1692.9	1230.5	EUR/tonnes
Sprat	canned		1768.0	1528.6	EUR/tonnes
Sprat	smoked		1608.1	1218.2	EUR/tonnes
Herring	frozen	whole with head	752.9	897.5	EUR/tonnes
Herring	fresh	gutted without head	576.7	614.8	EUR/tonnes
Herring	fresh	flaps	929.6	578.1	EUR/tonnes
Sprat	frozen	whole with head	247.4	292.9	EUR/tonnes

15. Portugal

CODIFICATION	SECTOR	2006	2007	Precision Level 2006	Precision Level 2007
Raw material (Total)	2	11,472.55	52,756.07	0	0
Raw material (Total)	3	11,315.86	12,443.01	0	0
Raw material (Total)	4	44,806.22	26,073.76	0	1
Income (turnover): Total	2	597,912,534.44	482,139,678.66	1	2
Income (turnover): Total	3	112,837,105.22	151,695,420.23	0	0
Income (turnover): Total	4	619,140,042.00	660,141,778.81	0	1
Production costs - labour	2	44,715,435.28	37,409,586.19	1	2
Production costs - labour	3	13,351,505.33	18,723,424.75	1	1
Production costs - labour	4	12,803,884.67	15,824,218.42	1	1
Production costs - energy	2	13,794,083.33	14,142,271.18	1	2
Production costs - energy	3	2,904,926.00	4,299,487.06	0	0
Production costs - energy	4	4,552,947.20	4,616,133.64	1	1
Production costs - raw material(value)	2	438,939,256.25	355,905,085.06	1	1
Production costs - raw material(value)	3	75,559,860.33	98,685,970.49	0	0
Production costs - raw material(value)	4	544,574,159.47	554,493,128.49	0	1
Production costs - packaging	2				
Production costs - packaging	3				
Production costs - packaging	4				
Production costs - other running costs	2	46,234,951.94	35,407,542.77	1	1
Production costs - other running costs	3	12,603,730.11	21,189,307.98	0	0
Production costs - other running costs	4	27,055,663.07	34,032,474.21	0	0
Production costs - TOTAL	2	543,683,726.81	442,864,485.21	1	2
Production costs - TOTAL	3	104,420,021.78	142,898,190.28	0	0
Production costs - TOTAL	4	588,986,654.40	608,965,954.76	0	1
Fixed costs	2	19,656,068.19	14,022,339.82	1	2
Fixed costs	3	5,106,588.44	6,414,682.42	0	0
Fixed costs	4	8,757,079.73	8,161,096.20	1	1
Financial Position	2	464,904,458.89	351,581,764.89	0	0
Financial Position	3	101,597,880.11	125,992,927.22	0	0
Financial Position	4	659,312,256.27	454,698,555.59	0	0
Investment(asset)-Historical	2	343,081,398.75	335,786,881.29	1	1
Investment(asset)-Historical	3	41,799,974.00	128,293,716.63	0	0
Investment(asset)-Historical	4	381,259,788.67	351,402,261.28	0	1
Investment(asset)-Replacement	2				
Investment(asset)-Replacement	3				
Investment(asset)-Replacement	4				
Investment(asset)-Insurance	2				
Investment(asset)-Insurance	3				
Investment(asset)-Insurance	4				
Employment (FTE)	2	3,435	3,290	1	2
Employment (FTE)	3	1,377	1,734	1	1

Employment (FTE)	4	1,122	1,277	1	1
Capacity Utilization	2	98,060.65	84,414.76	1	2
Capacity Utilization	3	13,799.06	16,609.22	1	1
Capacity Utilization	4	68,998.40	35,051.80	1	1
Number of enterprises	2	85	85		
Number of enterprises	3	17	17		
Number of enterprises	4	38	38		

16. Romania

	2008	
Indicator	**Total**	**Units**
Production costs	17,107,059	Euro
labour	11,248,717	Euro
energy, fuel	301,008	Euro
raw material	5,324,558	Euro
packaging	82,726	Euro
others	150,050	Euro
Fixed costs	1,577,834	Euro
Financial position	na	Euro
Investments:	44,695,150	Euro
replacement	35,456,120	Euro
inssurance	42,459,665	Euro
Employment	929	no
- Fulltime	839	no
- Part-time	90	no
Capacity utilisation	202	%
Number of companies	87	

Raw material (tones)	**2008**
sprat	258
carp	900
catfish	850
assian carp	2,100
other fresh water species	62
salmon	750
trout	120
pangasius	110
cod	650
seabream	60
other ocean fish	680
total	6,540

	2008		
Incomes	**Volume (tn)**	**Value (Euro)**	**Price (Euro/tn)**
cannedfish	71	214,360	3019.2
salted	76	288,328	3793.8
smoked	767	4,353,299	5675.7
marinate	1,733	7,793,611	4497.2
salads	15	50,722	3381.5
cookedfish	556	2,879,656	5179.2
pre-cookedfish	1,746	5,912,386	3386.2
Total	4,964	21,492,362	4329.6

17. Slovenia

Indicators	2007	2008
turnover	25761012	29036882
subsidies	1233215	418624
other income	211470354	209609697
wages and salaries of staff	3849833	4330292
imputed value of unpaid labour	2341149	-2662778
energy cost-electricity	342507	464554
energy cost- fuel	29103	110721
energy cost-other	6636	25244
raw material	14788966	16454382
other operational costs	522774	409991
fixed costs	1278648	3632091
extraordinary costs	252550	347336
insurance	60326	189970
total value of assets	25923744	52990399
net investments	3468162	755291
debt	14063442	41214002
number of persons employed	241	250
FTE national	213	211
capacity utilization	62.43	66.75
number of working hours	445192	440078
number of enterprises	11	12

Raw materials	2007			2008		
	Weight (kg)	Value (Euro)	Price	Weight (kg)	Value (Euro)	Price
ALK - Alaska pollock	107940	224330	2.08	31028	65700	2.12
ANE - European anchovy	1500	3579	2.39	1000	5058	5.06
BFT – Bluefin tuna	267664	1078686	4.03	586220	2356604	4.02
BSS - sea bass	6195	30611	4.94	3492	16450	4.71
BSS - sea bass 1-1,5kg				130	910	7.00
BSS - sea bass 200-300gr				1097	3697	3.37
BSS - sea bass 300-400gr				444	2100	4.73
BSS - sea bass 400-600gr				510	2703	5.30
BSS - sea bass; cleaned	5000	25000	5.00	6000	30600	5.10
BSS - sea bass; filet	1500	13350	8.90	1900	17480	9.20
COD - cod fish	3921	72164	18.40	4970	128783	25.91
CTC - common cuttlefish	5200	15600	3.00	3500	10850	3.10
dried cod-fish	3058	79522	26.00	3613	75355	20.86
EDT - musky octopus	1310	4500	3.44	3700	13400	3.62
HKE - hake; filet	72900	156050	2.14	76927	191507	2.49
HKE - hake; headless	13500	17345	1.28	10245	16073	1.57
JOD - John Dory				1100	14850	13.50
MSM - Mediterranean mussel	26584	68191	2.57	17901	43587	2.43
OCC - octopus	4300	19565	4.55	4000	21200	5.30
PEN - white shrimp - Panaeus	1000	4900	4.90	600	1830	3.05
PIL - European pilchard	6053	10462	1.73	7200	13440	1.87
REB - Beaked redfish				5345	13946	2.61
RED - redfish	7300	19600	2.68	6802	10792	1.59
RKQ - mussel Anadara spp.	1000	4100	4.10	600	2520	4.20
SAL - Atlantic salmon	47000	203980	4.34	130778	534376	4.09
SBG - gilthead	3444	13079	3.80	3519	12695	3.61
SBG - gilthead 1-1,5kg				80	500	6.25
SBG - gilthead 200-300gr				1183	4058	3.43
SBG - gilthead 300-400gr				841	2733	3.25
SBG - gilthead 400-600gr				317	1205	3.80
SBG - gilthead; cleaned	4800	23520	4.90	5500	27500	5.00
SBG - gilthead; filet	1100	9680	8.80	2000	18000	9.00
seafood	15000	42000	2.80	16000	45600	2.85
shrimp	20710	47230	2.28	15259	32734	2.15
SMD - shark	20283	34300	1.69	14300	23720	1.66
SQR - squid	149480	354501	2.37	246883	546032	2.21
SQR - squid; frozen	78000	109200	1.40	86000	150500	1.75
YFT - yellowfin tuna	1800	28800	16.00	1000	12500	12.50
Total	877542	2713846	3.09	1301984	4471589	3.43

Production	2007			2008		
	Weight (kg)	Value (Euro)	Price	Weight (kg)	Value (Euro)	Price
Alaska pollock	101825	261690	2.57	30588	83200	2.72
Atlantic salmon - filet				1193	7755	6.50
Beaked redfish - filet				4056	22700	5.60
cleaned frozen squids	78000	397800	5.10	125883	707063	5.62
cleaned squids				0	91153	
dried cod spread	37139	409151	11.02	45405	592027	13.04
European pilchard	935	2900	3.10	950	3040	3.20
gilthead	2201	17297	7.86	2291	19089	8.33
gilthead 1-1,5kg				80	1310	16.38
gilthead 200-300gr				1183	9712	8.21
gilthead 300-400gr				841	7645	9.09
gilthead 400-600gr				317	3157	9.96
gilthead cleaned	4800	30720	6.40	34100	5500	0.16
gilthead filet	1100	12980	11.80	2000	23200	11.60
hake - filet	83910	223200	2.66	76553	262500	3.43
hake - headless	16199	34179	2.11	10636	24783	2.33
John Dory - filet				1100	20790	18.90
marinated anchovies	772	8590	11.12	1174	13050	11.12
marinated musky octopus	160	2805	17.51	488	8505	17.44
redfish	6718	27008	4.02	6207	24921	4.02
salmon pate				153793	902764	5.87
sea bass				2024	18112	8.95
sea bass 1-1,5kg				130	2092	16.09
sea bass 200-300gr				1097	8930	8.14
sea bass 300-400gr				443	4862	10.98
sea bass 400-600gr				510	5646	11.07
seabass	2172	19200	8.84			
seabass cleaned	5000	32500	6.50	6000	38400	6.40
seabass filet	1500	18000	12.00	1900	22610	11.90
seafood	15000	52500	3.50	73345	278664	3.80
shark	20912	61272	2.93	13402	44200	3.30
shrimp	52	430	8.34			
shrimps	2501	13532	5.41	1553	7486	4.82
squid	62520	376372	6.02	93485	560442	6.00
Tuna pate	660765	3112203	4.71	1255393	6126319	4.88
Total	1104181	5114329	4.63	1948120	9951626	5.11

18. Spain

Industria de procesado (NACE 15.20) Apendice XII de la Decisión de la Comisión de 6/11/2008.			
Grupos de variables	**Variables**	**2006**	**2007**
Renta	Volumen de negocios	4,296,355	4,549,564
	Subvenciones	16,069	16,851
	Otras rentas	17,792	17,578
Costes de personal	Sueldos y salarios del personal	454,156	477,542
	Valor imputado del trabajo no remunerado		
Gastos de energía	Gastos de energía	56,432	68,792
Coste de materias primas	Compra de peces y otras materias primas para producción	2,257,923	2,366,728
Otros gastos de funcionamiento	Otros gastos de funcionamiento	500,365	502,768
Costes de capital	Amortización del capital	127,795	127,624
	Costes financieros netos	40,614	54,040
Gastos extraordinarios netos	Gastos extraordinarios netos	-34,914	-39,083
Valor del capital	Valor total del activo (valor del capital)		
Inversiones netas	Inversiones netas	164,469	134,906
Endeudamiento	Endeudamiento		
Empleo	Número de personas empleadas. Hombres		
	Número de personas empleadas. Mujeres		
	Número de personas empleadas. Total	22,248	22,798
	UTA nacional (jornada estándar de 1.800 horas año)	21,221	21,418
Número de empresas	Número de empresas total	592	620
	nº de empresas con 1 a 9 empleados	210	229
	nº de empresas con 10 a 49 empleados	281	292
	nº de empresas con 50 a 249 empleados	86	84
	nº de empresas con mas de 250 empleados	15	15

Variables (Apendice XII de la Decisión de la Comisión de 6/11/2008)	2006	2007
Volumen de negocios	4,296,355	4,549,564
Subvenciones	16,069	16,851
Otras rentas	17,792	17,578
Sueldos y salarios del personal	454,156	477,542
Gastos de energía	56,432	68,792
Compra de peces y otras materias primas para producción	2,257,923	2,366,728
Otros gastos de funcionamiento (servicios exteriores menos gastos de energia)	500,365	502,768
Amortización del capital	127,795	127,624
Costes financieros netos	40,614	54,040
Gastos extraordinarios netos	-34,914	-39,083
Inversiones netas	164,469	134,906
Número de personas empleadas.	22,248	22,798
UTA nacional (jornada estándar de 1.800 horas año)	21,221	21,418
Número de empresas total	592	620
nº de empresas con 1 a 9 empleados	210	229
nº de empresas con 10 a 49 empleados	281	292
nº de empresas con 50 a 249 empleados	86	84
nº de empresas con mas de 250 empleados	15	15

CNAE 152. Elaboración y conservación de pescados y productos a base de pescado. Variables INE (Encuesta Industrial de Empresas)	2006	2007
Ventas netas de productos	3,626,494	3,780,176
Ventas netas de mercaderías	540,198	631,758
Prestaciones de servicios	129,663	137,631
Importe neto de la cifra de negocios	4,296,355	4,549,564
Trabajos realizados para el inmovilizado	2,089	2,121
Subvenciones a la explotación	16,069	16,851
Otros ingresos de explotación	17,792	17,578
Total de ingresos de explotación	4,332,306	4,586,114
Variación de existencias de productos	40,211	23,410
Gastos de personal	454,156	477,542
(Gastos de energía incluidos en Servicios exteriores)	56,432	68,792
Consumo de materias primas	2,257,923	2,366,728
Consumo de otros aprovisionamientos	290,167	306,516
Consumo de mercaderías	402,193	483,946
Trabajos realizados por otras empresas	69,442	65,191
Consumos y trabajos realizados por otras empresas	3,019,724	3,222,381
Servicios exteriores	556,797	571,560
Dotaciones para amortización del inmovilizado	127,795	127,624
Total de gastos de explotación	4,158,472	4,399,106
Resultados financieros	-40614	-54040
Resultados extraordinarios	34914	39083
Inversión realizada en activos materiales	164,469	134,906
Resultado del ejercicio	123,613	118,589
Número de personas empleadas	22,248	22,798
Número de horas trabajadas	38,198	38,552
jornada estandar de trabajo anual	1,800	1,800
UTA nacional (nº de horas anuales/1800)	21,221	21,418
Número de empresas total	592	620
Empresas < 20 empleados	339	358
Empresas => 20 empleados	252	263
nº de empresas con 1 a 9 empleados	210	229
nº de empresas con 10 a 49 empleados	281	292
nº de empresas con 50 a 249 empleados	86	84
nº de empresas con mas de 250 empleados	15	15

19. Sweden

	2006	SEK	EUR	
Group	**Variable**	**Total**	**Total**	**Commentaries**
Raw material	Total	-	-	Not available
	Species	-	-	Not available
Revenue (Turnover)	Total	4757223000	514049857	
	Product	-	-	Not available
Production costs	Total	4350455000	470095846	
	Labour	639878000	69143110	Includes social security costs
	Energy	-	-	Not available
	Raw material	2739186000	295987422	
	Packaging	-	-	Not available
	Other running costs	971391000	104965314	Includes packaging and energy costs
Fixed cost		114002	12319	Depreciation costs
Financial position		0.65	0.53	
Investment	Historical	4686588000	506417272	
	Replacement	58994000	6374697	
	Insurance	537000	58026	
Prices/product	Value	-	-	Not available
	Weight	-	-	Not available
Employment	FTE	1819	1819	
Capacity utilization		-	-	Not available
Number of enterprises	≤ 9	171	171	
	10-49	30	30	
	≥ 50	7	7	Data for businesses with ≥ 250 FTE are included in the ≥ 50 FTE due to confidentiality reasons
	Total no enterprises	208	208	

	2007	SEK	EUR	
Group	**Variable**	**Total**	**Total**	**Commentaries**
Raw material	Total	-	-	Not available
	Species	-	-	Not available
Revenue (Turnover)	Total	4968827000	537164679	
	Product	-	-	Not available
Production costs	Total	4767311000	515379401	
	Labour	734931000	79451141	Includes social security costs
	Energy	78831000	8522178	
	Raw material	2781254000	300672858	
	Packaging	-	-	Not available
	Other running costs	1172295000	126733225	Includes packaging costs
Fixed cost		123995	13405	Depreciation costs
Financial position		0.53	0.53	
Investment	Historical	3963705000	428504016	
	Replacement	9736000	1052529	
	Insurance	276000	29838	
Prices/product	Value	-	-	Not available
	Weight	-	-	Not available
Employment	FTE	1867	1867	
Capacity utilization		-	-	Not available
Number of enterprises*	≤10	184	184	
	11-49	28	28	
	≥50	7	7	Data for businesses with ≥ 250 FTE are included in the ≥ 50 FTE due to confidentiality reasons
	Total no enterprises	219	219	

*The business size categories changed from 2006 to 2007 due to adaption to the DCF.

20. United Kingdom

13.1. - Processing industry : Population segments for collection of economic data		Country: UK		NP year: 2008.	MP
Segment	**Total population no. N**	**Planned sample no. T**	**Achieved sample no. A**	**Sample rate A/N*100 (%)**	**Response rate A/T*100 (%)**
Companies 1 - 10 FTEs	252	all	77	31%	31%
Companies 11 - 25 FTEs	105	all	40	38%	38%
Companies 26 - 50 FTEs	35	all	12	34%	34%
Companies 51 - 100 FTEs	39	all	21	21%	21%
Companies 100 + FTEs	25	all	11	44%	44%
Source - 2008 SEAFISH survey of the UK seafood processing industry					

Parameter	2008	Mean	Unit
FTE Band 1 - 10			
Investment (asset)	Gross Investment	806200	£
	Net Investment	435260	£
	Turnover	682300	£
Income	Volume Output (tonnes)	180.58	tonnes
	Raw Materials	527868.1	£
	Labour	56366.18	£
	Energy	4842.13	£
Production Costs	Other goods and services	27342.5	£
Fixed Costs		55835.77	£
Financial Position		5.43	
Prices/product		n/a	
No. of processing sites		251	
Total employment (FTEs)		1387	
TE Band 11 - 25			
Investment (asset)	Gross Investment	1671137	£
	Net Investment	636171	£
	Turnover	2414261	£
Income	Volume Output	609.45	tonnes
	Raw Materials	1347209	£
	Labour	198644.6	£
	Energy	28830.05	£
Production Costs	Other goods and services	149344.3	£
Fixed Costs		48249.94	£
Financial Position		5.56	
Prices/product		n/a	
No. of processing sites		105	
Total employment (FTEs)		1701	
FTE Band 26 - 50			
Investment (asset)	Gross Investment	1790604	£
	Net Investment	1066305	£
	Turnover	4988288	£
Income	Volume Output	503.5	tonnes
Production Costs	Raw Materials	3086083	£
	Labour	1275212	£

	Energy	57870.38	£
	Other goods and services	666754.7	£
Fixed Costs		111962.9	£
Financial Position		7.18	
Prices/product			n/a
No. of processing sites		35	
Total employment (FTEs)		1254	
FTE Band 51 - 100			
Investment (asset)	Gross Investment	8291786	£
	Net Investment	2384786	£
	Turnover	12201951	£
Income	Volume Output	2612.66	tonnes
	Raw Materials	5618543	£
	Labour	1278725	£
	Energy	111101.5	£
Production Costs	Other goods and services	441912.5	£
Fixed Costs		215815.7	£
Financial Position		7.18	
Prices/product			n/a
No. of processing sites		39	
Total employment (FTEs)		2717	
FTE Band 101 +			
Investment (asset)	Gross Investment	16257764	£
	Net Investment	8871457	£
	Turnover	62946405	£
Income	Volume Output	10150.3	tonnes
	Raw Materials	44816895	£
	Labour	9557808	£
	Energy	1352464	£
Production Costs	Other goods and services	6878826	£
Fixed Costs	Depreciation	2044959	£
Financial Position	Share of owned/borrowed capital	4.96	
Prices/product		n/a	
No. of processing sites		24	
Total employment (FTEs)		8982	

European Commission

EUR 24140 EN **– Joint Research Centre – Institute for the Protection and Security of the Citizen**

Title: Scientific, Technical and Economic Committee for Fisheries (STECF) Report on the Evaluation of Data Collection Related to the Fish Processing Sector (SGECA 09 03).

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Luxembourg: Office for Official Publications of the European Communities
2009 – 135 pp. – 21 x 29.7 cm
EUR – Scientific and Technical Research series – ISSN 1018-5593
ISBN 978-92-79-14845-3
DOI 10.2788/5476

Abstract

This report constitutes the first attempt to compile national statistics and give an overview on the performance of the fish processing industry in the EU. Since 2006, Member States have to collect data on the fish processing industry under the Data Collection Regulation. This has allowed working in this report with 2006 and 2007 data.

The report first presents the data at the national level and later at the EU level, showing the importance of this sector, with a turnover around 25 billion Euros, Gross Value Added of around 4 billion Euros and more than 120 thousand employees. The report also deals with the trends and drivers for change in the fish processing industry and the future possible issues following the data analysis.

Hence this report helps to quantify the importance of this industry, necessary since the fish processing industry is an important driver to accomplish the basic aims of the Common Fisheries Policy: the sustainable use of marine resources.

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LB-NA-24140-EN-N

ISBN 978-92-79-14845-3