



# **Study on the economic importance of activities ancillary to fishing in the European Union**

**9th EMFF expert group  
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# Objectives

- Get a better understanding of the socio-economic importance of ancillary activities (general and to coastal communities) and of the constraints under which they operate.
- Calculate estimates of multipliers (income & jobs) national and regional level.
- Look at activities complementary to fishing and inland fishing.

# Methodology: desk research & case studies

Activities related to servicing of the fishing vessel and fishing equipment:

- Building and maintaining fishing vessels
- Technical equipment
- Netting

Supplies for the operation:

- Fuel
- Ice
- Salt
- Bait
- Food for the crew
- Port facilities

R + D + I services:

- Education and training
- Research
- Accounting
- Management
- Insurance
- Certification

Activities related to servicing of the aquaculture equipment:

- Building and maintaining aquaculture installations
- Technical equipment

Supplies for the operation:

- Feed
- Energy
- Veterinary services
- Fertilisers
- Sewage facilities

R + D + I services:

- Education and training
- Research
- Management
- Insurance
- Certification

**Marine fishing**

Activities related to the sale of fish

- Sorting
- Transport
- Auctioneering
- Storage
- Pre-sale processing

**Aquaculture**

Activities related to the sale of fish

- Handling and packaging
- Transport
- Auctioneering
- Storage
- Pre-sale processing

Downstream

*First point of sale*

# Case studies

*73 case studies were performed:*

26 in marine fishing

26 in aquaculture

3 in inland fishing

4 in shellfish gathering

4 in the seaweeds industry

2 in ice fishing

8 in complementary activities

*9 MS: ES, UK, FR, NL, DK, PL, IT, GR and HU*

## Findings

- The ancillary sector is about **one-third of the size** of the primary sector, in terms of income as well as employment.
- Multipliers** found in the case studies are lower than these found during the desk research: on average 0.5 and 1.0, both related to income as well as employment.
- Higher in aquaculture (1) than in fishing (0,5)
- differences explained by different definitions of the ancillary sector, related to the inclusion of downstream activities beyond the first point of sale (processing).

## Marine fishing

- *The sector ancillary to marine fishing employed around 36k FTE in 2014.*
- *Generating 2.8 billion Euros in 2009 and 2.5 billion Euros in 2014.*
- *Mainly generated in activities related to the servicing of equipment of vessels.*
- *90%+ of jobs and 88% of income associated to industrial & long distance fishing.*
- *Ancillary companies are reducing their dependency on marine fishing through the diversification to:*
  - other sectors, and*
  - other regions; nationally, within the EU and even globally*

## Characteristics of jobs

*The ancillary industry is dominated by males.*

*Aging workforce.*

*Education levels are low, but increasing in technology related services.*

*Older people generally have lower education levels, compared to younger people.*

*Due to the less seasonal character of the work, not many part time workers.*

*Foreign labour is not significant.*

# Aquaculture

- *The sector ancillary to aquaculture is estimated to employ close to 25k FTE in 2014 (up from 19k in 2009).*
- *Marine aquaculture increasing the number of jobs.*
- *The sector generated close to 2.8 billion Euros in 2014.*
- *Servicing equipment and vessels and supplies (fish feed) account for the majority of jobs & income*
- *Companies investing and innovating continuously.*
- *The industry related to the production of feed is driven by economies of scale with a tendency towards large companies.*
- *Ancillary companies tend to diversify to other sectors – e.g. agriculture, construction and tourism.*



## Aquaculture

- *The ancillary industry is dominated by males.*
- *In less technical jobs (e.g.: pre-sales activities), the gender distribution becomes more equal.*
- *Aging workforce.*
- *Education levels are low, but increasing in technology related services.*
- *Foreign labour involvement is not significant.*
- *Most people have full-time employment.*

## Complementary activities & inland fishing

*-The economic importance of the complementary sector is limited compared to both the primary sector and the ancillary sector in marine fishing and aquaculture.*

*-Significant activity and growth is found in aquaculture focusing on 'experiencing' the cultured product via guided tours, tastings, restaurants and local shops.*

*- Inland fishing is significant in some Member States, but has been in decline since the 1980s.*

*14.000-15.000 vessels*

*35.000 tonnes produced*

*100 to 110 million Euros*

*17.100 fishermen, most part-timers*



**Thank you for your attention!**