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Coastal communities and coastal fisheries in the N-Atlantic (Kystsamfund): A summary report on conference proceedings

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Skýrsla Matís 33-14
Nóvember 2014

ISSN 1670-7192

Report summary

<i>Title</i>	Coastal communities and coastal fisheries in the N-Atlantic (Kystsamfund): A summary report on conference proceedings		
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<i>Report no.</i>	33-14	<i>Date:</i>	November 2014
<i>Project no.</i>	2002-2295		
<i>Funding</i>	The Working Group for Fisheries Co-operation (AG-Fisk) of the Nordic Council of Ministers _ AG-fisk project 108-2014		
<i>Summary in English:</i>	<p>A conference titled “Coastal fisheries and coastal communities in the N-Atlantic” was held on September 27th 2014 in connection with the Icelandic Fisheries Exhibition www.icefish.is, which took place in Kópavogur, Iceland on September 25-27.</p> <p>The motivation for the conference is that coastal fisheries and coastal communities in the N-Atlantic are currently faced with numerous operational and social challenges, but at the same time new opportunities have arisen. Some of these challenges and opportunities are specific for each country and some are common for the area as a whole. The aim of the conferences was to identify these challenges and opportunities, and to discuss how they can be addressed on national and/or cooperative Nordic level.</p> <p>The conference was attended by fifty stakeholders from seven N-Atlantic countries. At the conference, representatives from Iceland, Norway, Sweden, Denmark, Faroe Islands, Greenland and Newfoundland had presentations on the coastal fishing sector and the coastal communities in their countries. They also deliberated on the future prospects of the traditional fishing villages, taking into consideration current trends and upcoming opportunities. These country profiles were followed by a presentation on a Nordic research project that is set to examine wages in the Nordic coastal sectors and to compare them with other professions. The last presentation of the conference was aimed at comparing operational environment in the coastal sector in Iceland and Norway, as Icelandic fishermen working in Norway introduced their experience in running their business in Norway as opposed to Iceland.</p> <p>The planned agenda included a presentation from the chairman of the Icelandic Regional Development Institute, which had intended to deliberate on the institute’s strategy to support regional development. But he unfortunately had to cancel with only few hours advance, which made it impossible to find a replacement.</p> <p>Following is a short summary of each presentation, but pdf versions and video recordings along with numerous other supporting material is available at the project’s web-page www.coastalfisheries.net.</p>		
<i>English keywords:</i>	<i>Coastal fisheries, regional development, rural development, fisheries, small boats</i>		

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¹Matís, Iceland. ²Nofima, Norway. ³SYEF, Sweden. ⁴Karlkrona Municipality, Sweden. ⁵Danmarks fiskeriforening, Denmark. ⁶Syntesa, Faroe Islands. ⁷Meginfélag Útróðramanna, Faroe Islands, ⁸KNAPK, Greenland. ⁹CASD/MI, Newfoundland. ¹⁰FFAW, Newfoundland. ¹¹University of Iceland, Iceland. ¹²NASBO, Iceland. ¹³SLU, Sweden. ¹⁴IFRO, Denmark. ¹⁵Eskøy, Norway.

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1 Introduction

Coastal fisheries represent a highly important part of the N-Atlantic marine sector. The coastal fleet catches a significant part of the total catches, provides employment for a large number of fishermen, as well as processors and other supporting industries. Large portion of the vessels are located in small and often remote fishing villages where they play an important role in supplying local processing companies with raw material, which makes the fleet highly important for regional development. Coastal fisheries and coastal communities in the Nordic countries have though been fighting for survival in recent years. The coastal sector in general is struggling to return profits, the number of young people starting out in the industry is low, quality of the coastal catch is highly variable and the coastal communities have problems relying almost entirely on catch from small vessels that are highly dependent on weather. Different social structures, educational opportunities and requirements towards certain “quality of life” issues have also had the affects that people have been migrating from the coastal communities into larger cities. There is also fierce competition between different fleet types in each of the respective countries, as they compete for the same scares resource, which has created tension and disunity within the catching sectors. Survival of coastal communities in the N-Atlantic and Nordic countries has therefore become to a large extent a political issue, rather than just a question of good or bad business. Social, economic and environmental considerations therefore need to be addressed when looking at the future of coastal fisheries and coastal communities in the Nordic countries and the N-Atlantic.

In attempt to adequately address these issues the Working Group for Fisheries Co-operation (AG-Fisk) of the Nordic Council of Ministers has funded a project, titled **“kystsamfund” / Coastal fisheries and coastal communities in the N-Atlantic**. The project aims at establishing a network of people across the Nordic countries that can contribute to a constructive analysis of the Nordic coastal communities and the role of the coastal sector in the national economy, regional development and other relevant issues. The project partners are to provide an analysis on the coast sectors in each of the Nordic countries (Labrador & Newfoundland included) which will be published in a NMR report in March 2015. The first draft outcomes were presented at a conference, which was held in connection with the Icelandic fisheries exhibition and the chairmanship of Iceland in the Nordic Council of Ministers

A conference was titled **“Coastal fisheries and coastal communities in the N-Atlantic”** and was held on September 27th 2014 in connection with the Icelandic Fisheries Exhibition www.icefish.is, which took place in Kópavogur, Iceland on September 25-27.

The conference was attended by fifty stakeholders from seven N-Atlantic countries. At the conference, representatives from Iceland, Norway, Sweden, Denmark, Faroe Islands, Greenland and Newfoundland had presentations on the coastal fishing sector and the coastal communities in their countries. They also deliberated on the future prospects of the traditional fishing villages, taking into consideration current trends and upcoming opportunities. These country profiles were followed by a presentation on a Nordic research project that is set to examine wages in the Nordic coastal sectors and to compare them with other professions. The last presentation of the conference was aimed at comparing operational environment in the coastal sector in Iceland and Norway, as Icelandic fishermen working in Norway introduced their experience in running their business in Norway as opposed to Iceland.

The planned agenda included a presentation from the chairman of the Icelandic Regional Development Institute, which had intended to deliberate on the institute's strategy to support regional development. But he unfortunately had to cancel with only few hours advance, which made it impossible to find a replacement.

This report contains a short summary of each presentation along with the slides presented. The slides and video recordings of each presentation, along with numerous other supporting materials are available at the project's web-page www.coastalfisheries.net.

2 Opening of the conference

Sigurður Ingi Jóhannsson, the Icelandic Minister of Fisheries

Sigurður Ingi thanked the organisers for initiating the conference. He deliberated about the importance of the coastal sector in Iceland, both in historic and present context. Sigurður Ingi emphasised the significance of the small boat sector for Icelandic fisheries as a whole, as well as for ensuring diversified processing and marketing opportunities. He also highlighted the importance of the small boats in respect to regional development and social sustainability. Behind the small boats are often family owned companies that play a significant role in many rural communities. These companies face many of the same challenges and opportunities as any other businesses in rural areas. There is a value in diversified markets and the coastal sector is an important piece in the diversified seafood sector in Iceland. Sigurður Ingi then opened the conference and acknowledged that it is a part of the initiatives connected to the Icelandic chairmanship of the Nordic Council of Ministers 2014.



Sigurður Ingi Jóhannsson, the Icelandic minister of fisheries

3 Welcome, Agenda & Aim of the Conference

Jónas R. Viðarsson, Research group leader at Matís in Iceland

Jónas thanked the Working Group for Fisheries Co-operation (AG-Fisk) of the Nordic Council of Ministers for funding the event and the "Kystsamfund" project as a whole. The "Kystsamfund" project has the objective to establish a network of people across the Nordic countries that can contribute to a constructive analysis of the Nordic coastal communities and the role of the coastal sector in the national economy, regional development and other relevant issues. The project partners are to provide an analysis on the coast sectors in each of the Nordic countries (Labrador & Newfoundland included) which will be published in a NMR report in March 2015. The first draft outcomes



Jónas R. Viðarsson from Matís in Iceland

will be presented at this conference, which is held in connection with the Icelandic fisheries exhibition and the chairmanship of Iceland in the Nordic Council of Ministers. Following are the slides accompanied with Jonas's presentation:



Kystsamfund

Conference on Coastal fisheries and coastal communities in the N-Atlantic
Höld á Síðisinni í Kópavogur á 27.09.2014



Working Group for Fisheries Co-operation (AG-Fisk)

Welcome



Working Group for Fisheries Co-operation (AG-Fisk) funded this conference

Objective of AG-Fisk is to facilitate networking and co-operation within the Nordic marine sector




27.09.2014 1

Agenda

10:35 - 10:25	Opening of the conference - Sigurður Þorj. Jóhannsson, Minister of Fisheries
10:25 - 10:30	Welcomes, Agenda & Aims of the Conference - Jónna R. Vilhjánsdóttir (Matís)
10:30 - 10:45	Norway: Audun Jørgensen (Pollens), Health Sigvaldsson (Biskaya AS)
10:45 - 11:00	Sweden: Bengt Larsson (Sveigen yfirskrifskvæma E3 - Fiskeping), Carl Axel Ottosson (Karlskrona Marakapital)
11:00 - 11:15	Denmark: Henrik S. Lund (Danmarks Fiskeforretning), Mia Nielsen (University of Copenhagen - IFRO)
11:15 - 11:30	Ferøe Islands: Duttia Djurhuus (Optimal), Auðunn Konaðsson (Ningshelling Óðobæturarnir)
11:30 - 11:45	Switzerland: Thierry Buehlmann (SOLAFIC)
11:45 - 12:00	Newfoundland: Northern Marine Centre (Centre for Aquaculture and Seafood Development - Fisheries and Marine Institute (University of Newfoundland)), David Decker (Fish Food & Allied Workers)
12:00 - 12:15	Coffee break
12:15 - 12:30	Iceland: Sigrún Ágústsson (University of Iceland), Jónna R. Vilhjánsdóttir (Matís), Hildur Árnason (National Association of Small Boat Owners)
12:30 - 12:45	Presentation on the project "Einkalíf og vinnuleysis á norðvestri kystfélakari" Staffan Vágu (SU), Alan Nilsen (University of Copenhagen - IFRO)
12:45 - 13:00	Opening endorsement of coastal vessels in Norway: Wulf Sigvaldsson and Björn Sigurðsson (Biskaya AS)
13:00 - 13:15	Coastal communities and regional development in Iceland: Þorvaldur Björnsson (The Icelandic Regional Development Institute / University of Akureyri)
13:15 - 14:00	O&A



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Aim of the conference

Coastal fisheries and coastal communities in the N-Atlantic are faced with numerous challenges, some of which are specific for each country and some that are common for the area as a whole. These challenges will be identified at the conference and the future of the coastal communities discussed.

Knowledge transfer and networking

What are the common challenges and how can we cooperate to solve these challenges?






Working Group for Fisheries Co-operation (AG-Fisk)

27.09.2014 4

Key questions

The country profiles are to address the following questions:

1. Basic description of the coastal sector
2. The importance of the coastal fleet for regional development
3. Strategies in place to support the coastal fleet and regional development
4. What is the future of the coastal fleet and coastal communities

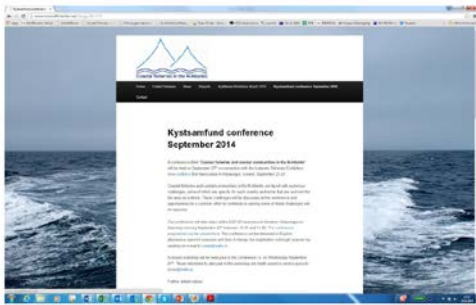




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The web-page

www.coastalfisheries.net

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4 The Norwegian coastal sector

Audun Iversen and Edgar Henriksen (Nofima)

Audun reported that the Norwegian coastal fleet consists of 5.809 vessels, ranging from very small dinghies up to 21 meter longliners, gillnetters, Danish seiners and purse seiners. More than half of the fleet is operated in North-Norway, which makes the fleet very important for regional development. The fleet can be broken into three size categories i.e. below 11 meters (84%), 11-15 meters (13%) and 15-21 meetings (3%). The quotas are quite equally divided between the three groups. Coastal catch accounts for about 25% of Norwegian total catches, but in value the share is higher, as the coastal fleet catches about 70% of the cod, the most valuable species. For 2014 the coastal fleet has been allocated quotas of 300 thousand tons of cod, 54 thousand tons of haddock and 38 thousand tons of saithe.



Audun Iversen from Nofima in Norway


Fishermen in Norway are 12 thousand in total, of which 9.800 have fisheries as their main occupation. Almost 50% of the full time fishermen live in N-Norway and 40% in West Norway. The coastal sector has reduced dramatically in size since 1960, when the fishing fleet counted 40 thousand vessels and 50 thousand fishermen.

One of the problems that the sector has to deal with is the seasonality of the fishery, as 3/4th of the yearly catches are landed from the beginning of February to the end of April, when the Barents Sea cod comes to the Norwegian coast to spawn. The fishermen prioritize low cost over higher quality, even supplies and higher prices. 73% of the coastal catch is caught with gillnet or Danish seine, which has proven to be a reason for some quality problems.

The coastal fleet has been favoured by legislation because of regional development issues. This could however be up for reconsideration at the parliament in near future, as some of the reasoning for the advantages given to the sector have been challenged. The so called social contract (samfunnskontrakt), which has been a big motivation for favouring the coastal sector, will be discussed at the parliament in 2015 and economic optimisation, restructuring, legislation and possibly a resource tax will be part of that discussion.

The slides from Audun's and Edgar's presentation are presented below.

Kystsamfund
Conference on
Coastal fisheries and coastal communities in the N-Atlantic
Held at Simarna in Kópavogur on 27.09.2014






Norway

Audun Iversen and Edgar Henriksen

Content of the presentation

The presentation will focus on the following issues:

1. The Norwegian coastal fleet
2. Significance of the coastal fleet for regional development
3. Strategies in place to support the coastal fleet and regional development
4. What is the future of the coastal fleet and coastal communities?

The Norwegian coastal fleet

What is a coastal vessel?

The coastal fleet is defined by

- Vessel length:
 - Below 11m
 - 11-15m
 - 15-21m
- Fishing rights:
 - «Coastal fishing rights», individual vessel quotas
 - Structuring allowed for boats over 11m
 - The largest «coastal vessels» are now 50m long...

The Norwegian coastal fleet consisted in 2012 of 5809 boats



Coastal vessels by region and size

Region/vessel group	Below 11m	11-14,99 m	15-20,99m
North Norway	2729	452	132
Mid Norway	417	62	5
West Norway	1316	155	32
South Norway	252	32	8
East Norway	188	28	1
Total	4902	729	178

Quotas are quite equally divided between the three groups

Catches from the coastal fleet

What do they catch?

- Cod, saithe, haddock, but also herring and mackerel

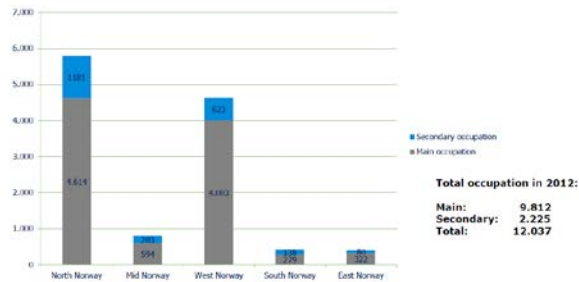
How much?

- About 25 % of total catch
- 70 % of cod, the most important species for the coastal fleet
 - 2014: 300.000 tonnes of cod, 54' of haddock, 38' of saithe

By what?

- Line, gillnet, danish seine, purse seine

Norwegian fishermen by region



Significance for regional development

The size and distribution of the fleet makes it of great importance for many Norwegian coastal towns and villages. For many towns, employment in processing is of equal or greater importance.

Continuing decline in employment:

- 1960:**
- 50,000 fishermen (main occ.)
 - 40,000 boats
 - 30,000 in the industry
- Today:**
- 9,000 fishermen
 - 6000 boats (halved in 12 years)
 - 9000 in the industry



Fishing harbours in Northern Norway

Profitability in the coastal fleet

Vessel group	Operating margin		
	2009	2010	2011
less than 11 meters	-0,1	-0,7	6,2
11 – 14,99 meters	6	7,8	6,6
15 – 20,99 meters	5,5	6,5	8
Coastal purse seiners less than 11 meters	16,8	-1,5	14,1
Coastal purse seiners 11 – 21,35 meters	31,8	12,8	18,5

- Marginal profitability for the smallest vessels
- Somewhat better for the larger coastal fleet
- The group (also) doing purse seines do well

The coastal fleet and regional development

Regulations promoting regional development

(or more precisely: Methods of conservation, slowing down restructuring...)

From the Ministry:

- "...to sustain a varied fleet along the coast"
- "...facilitate a controlled restructuring, ...to follow productivity development"

1. Ownership requirements
 1. Owners must be active fishermen
 2. Nationality or local attachment:
 1. Boats over 15m: must be at least 60 % Norwegian owned
 2. Boats under 15m: must live in Norway
2. Ownership change
 1. Licenses can not be rented
 2. Licenses may only be sold with boats (for now)
 3. Restrictions on sale by:
 1. geography
 2. vessel group

Strategies to support the coastal fleet and regional development

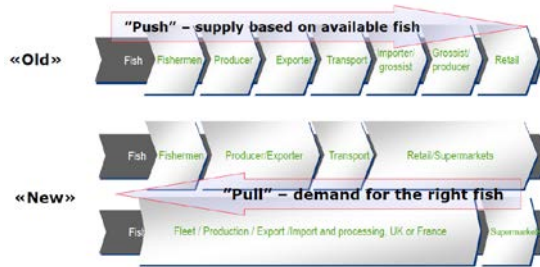
Measures supporting the processing industry

- Obligations for delivery
- Obligations for processing
- Fresh fish bonus (20-30 % of the quota)
- Live storage
- New quota year/partly transferable quota year has been discussed...

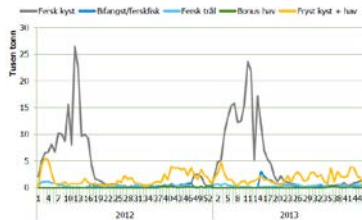
Are these measures effective?

- Predictable landings?
- Do we avoid quality issues?

The coastal fleet and the value chain



Industrial production based on landings from the coastal fleet?

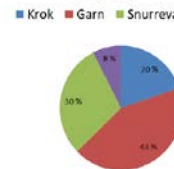


- Fishermen prioritize low cost
- No price incentive for delivering
 - Higher quality
 - Even supplies
- A lot of the cod is today exported fresh and unprocessed from Norway

Quality issues

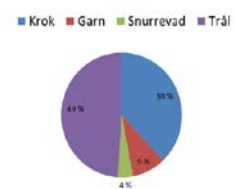
- Much of the catch has quality issues
 - Strengthened by strong seasonality
- Gear use is very different from Iceland

Norway



Quality issues: 73 % caught with gill net or danish seine

Iceland



In Iceland: 13 %

A new «social contract»?

There is a debate in Norway on what the society should expect from the fishing fleet

The fishing fleet is given access to a common, valuable resource

What should society expect in return?

- Employment?
- Raw material for processing industry?
- Resource tax?
- Debate is particularly strong in the north, and in connection to trawl licenses given to processing companies in the 70ies.

What is the future of the coastal fleet and coastal communities

We are

- harvesting a finite resource, with
- increasing productivity

This do and will present many communities with challenges

- Fewer boats/fishermen
- Fewer landings
- Less processing?

Coastal fisheries still have great potential

- Well suited to traditional value chains
- Can be more adapted to a demand-driven model
- Great potential for increased productivity
- **So: How do we develop the coastal fleet?**



cod is king!

Thank you for your attention!

For my contact details on SMS:
Send Nofima 26 til 2077

5 The Swedish coastal sector

Bengt Larson, Sveriges yrkesfiskares Ek. Förening Carl-Axel Ottosson, Karlskrona Municipality

Bengt Larson reported that the Swedish coastal fleet consists of vessels under 12 meters, which is also the EU's definition for small-scale fisheries under the CFP (Common fisheries Policy). There are 1.363 vessels in Sweden that meet this criteria, which is 87% of all registered fishing vessels in the country. The number of coastal vessels have though reduced by 46% since 1995. The number of Swedish fishermen have also reduced significantly since 1995 and there has been little or no recruitment. In 1995 there were 2.600 fishermen in Sweden, 1.500 of which were under 50 years of age. Today there are only 1.300 fishermen left and 500 of them are under 50 years of age.

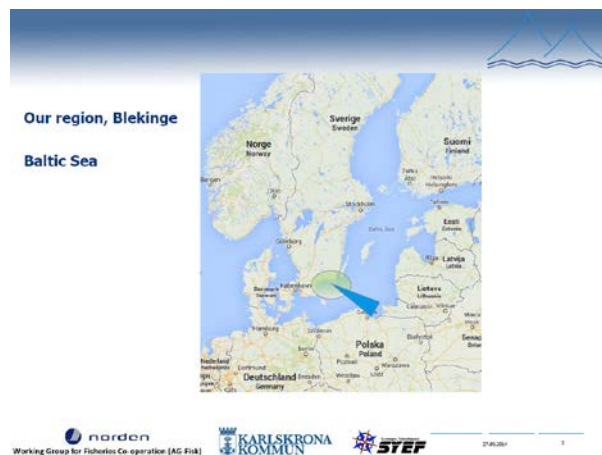
As members of the EU the government is to pay attention to small-scale fisheries and consider special treatment to the sector. This is though left to each member state to act on and the Swedish government has not really done anything to favour the coastal sector.

Carl-Axel explained how the coastal sector in the Karlskrona kommun consists with other industries, but has though had to struggle for survival in the last few years. The coastal sector has had to compete with the navy, heavy industry and construction industry for space and attention. The municipality's authorities have though actively tried to support the coastal sector, not the least because of cultural and "tourist" importance.

Following are the slides accompanied with Bengt's and Carl-Axel's presentation:



Bengt Larson from SYEF and Carl-Axel Ottosson from Karlskrona municipality in Sweden



The Swedish coastal fleet

Presentation



- Bengt Larsson
- Been a fisherman the last 24 years.
- Ecological small-scale fishery (10 m vessel)
- Several generations have been in the fishery.
- Hometown - Ronneby



Carl-Axel Ottosson
62 years old
Department of industrial and
commercial development
The municipality of Karlskrona

The Swedish coastal fleet

The issue:

What is a coastal vessel?



The Swedish coastal fleet

First:



According EU's next CFP, the magical limit of what is small-scale fishery, will be <12 meters.
In this CFP, the Commission has said that sustainable fishing practices will be rewarded.
It also says that ITQ's shall include all trawl fishing vessels. In addition, it is up to each Member State to decide on vessels <12 m even could be covered by ITQ's.

The Swedish coastal fleet

The issue:

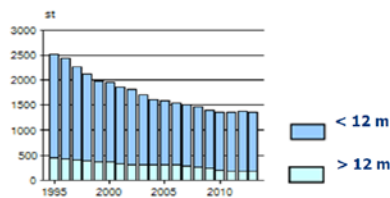
What is a coastal vessel?

<12 m !



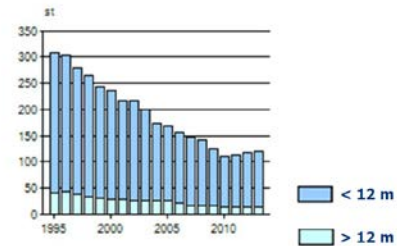
The Swedish coastal fleet

2013: 1 362 registered fishing vessels. Of these were 87 % <12m
1995-2013 reduction of 46%



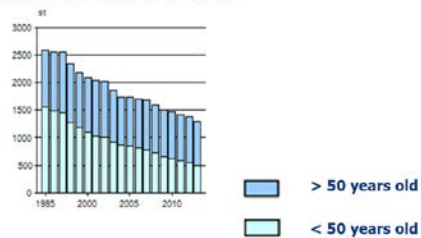
The Swedish coastal fleet

Vessels in region Blekinge län 1995 – 2013



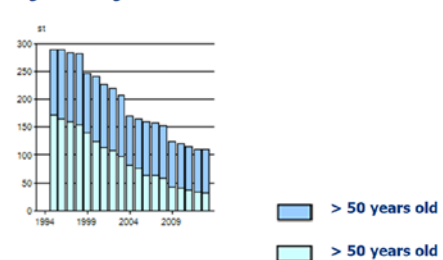
The Swedish coastal fleet

Number of fishermen in Sweden 1995 – 2013



The Swedish coastal fleet

Fishermen in region Blekinge 1995 – 2013



The Swedish coastal fleet 

The most important for the coastal fleet's regional development:

- The EU pays attention in the CFP, that small-scale fisheries may need special treatment in the management of the values in a local fishing is to be preserved.

But, EU leaves it entirely for each Member State to deal with the issue.



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The Swedish coastal fleet 

There is currently no administrative authority working with these issues.

Swedish fisheries management are today, as well as the EU administration, *entirely focused on the management of the large scale distant water fisheries.*



We are pushing for small-scale activities will be the norm in fisheries management, rather than large scale.



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The Swedish coastal fleet 

The future of the coastal fleet and coastal communities

In Sweden, there are clear political objectives that conservation of local fisheries is important

Swedish Board of Agriculture has embarked on developing a strategy for the Swedish fishing to become a guide in this work.

§ § § ?

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The Swedish coastal fleet 



SWEDEN AT EUROPE VISIT KARLSKRONA 2014-17 N. 10.20.2014

- Saltö Fishing harbour
- Saab Kockums
- Naval Base
- Swedish Coastguard
- Maritime Museum
- ABB
- Stena Line

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The Swedish coastal fleet 

Karlskrona
-Residential city of the county Blekinge
-64.000 inhabitants

UNESCO
-World heritage among 1000 other in the world
-Biosphere area



-Industri, Telecom, Tourism, Maritime, Transports and Public agencies
-Blekinge institute of technology

"i Karlskrona AB", owned by the municipality
-We serve the companies and businesses in Karlskrona
-Businessdevelopment

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The Swedish coastal fleet 

The fishing industry in Karlskrona



- 16 different harbours
- "Saltö port" mainport for landings
- Saltö, once the largest fishing port in Sweden approx. 15.000 tons
- 4 fishfood industries at Saltö, now 1
- 9-16 trawlers landing fish depending season
- 16 coastal fishingvessels landing in 5 homeports
- Approx. 3.000 tons fish are landed at Karlskrona. Herring, Cod, flatfish

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The Swedish coastal fleet 

- A memberowned first buyer company is now closing down
- The municipality bought the Iceproduction-machine to guarantee ice.!!!!
- 90 tons capacity a day



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The Swedish coastal fleet 

The local coastal fishing has to have a plan

Threats:

- Lack of dialog
- Lack of knowledge from the local politicians and the society
- A small industry
- Increased interest for locations of housing
- The municipalities "Master plans".
- Lack of commitment from the companies in the fishing industry.




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The Swedish coastal fleet 

Possibilities:

- More dialog
- “Educate” local decisionmakers the conditions of the fishindustry
- Plan for development
- Sustainable fishing
- Consumers interest of local food
- Local plan for arcipelago harbours in Karlskrona

The Swedish coastal fleet 

More oppurtunities;



www.fiskonline.se

When traditional craftsmanship meets modern technology...

The Swedish coastal fleet 

The new way of selling and distribute local landed fish whit high quality!



The Swedish coastal fleet 



Shortest path from sea to plate!

Thanks for listening !

6 The Danish coastal sector

Henrik S. Lund, Danmarks Fiskeriforening

The definition of a coastal vessel is variable in Denmark, but the government has initiated a program that is aimed at supporting smaller vessels i.e. coastal fishing system. Vessels under 17 meters that stay out at sea for less than three days are eligible for that system (80% of fishing trips need to be shorter than three days). There are about 400 vessels that are eligible for that system, but only half of them have actually entered the system. The coastal system gives access to certain extra quotas, which are valued at approximately 20 million DKK a year or 6.700 Euros for each vessel on average.

Coastal vessels use primarily gillnets, bottom trawls and pelagic trawls as fishing gear. There are almost 1.200 full time fishermen in the Danish fishing fleet, of which 44% are working on vessels under 18 meters and 18% working within the coastal fishing system.

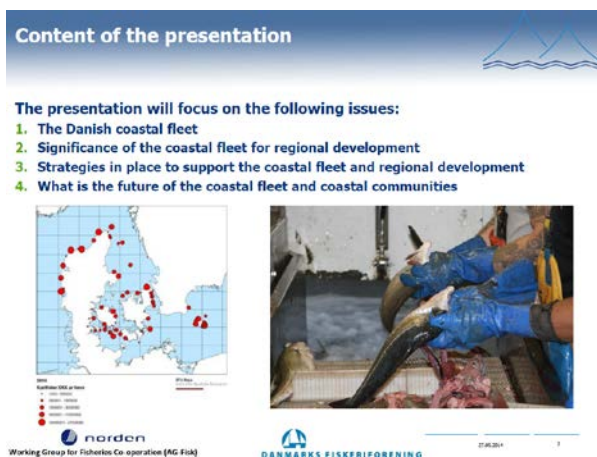
The total landing value of the Danish fleet in 2011 amounted to 400 million Euros, where the coastal fleet accounted for 34 million Euros and vessels working within the coastal fishing system accounted for 13.5 million Euros.

Numerous research have shown that the Danish coastal fleet is struggling because of low income and negative returns. In addition the coastal cod stocks and the plaice stock have been migrating further out to sea and away from many traditional coastal fishing grounds. And to make things even more worse the coastal fleet is now competing with growing seal population and a huge stock of the great Cormorant. The future of the Danish coastal sector is therefore not very bright.

Following are the slides accompanied with Henrik's presentation:



Henrik S. Lund from Danmarks Fiskeriforening in Denmark



The Danish coastal fleet

What is a coastal vessel?

- As in many other countries the definition of a "coastal vessel" is difficult. It is not possible in most countries to actually make the definition.
- Should days at sea or size be used to define the coastal vessel?
- In Denmark there have been made an attempt to maintain the abundance of smaller vessels by creating a **coastal fishing system**. Here the vessels today need to be under 17 meter to participate and 80 % of the trips need to be carried out under 3 days.
- Not all vessels under 17 meter think the coastal system is good so only about 50 % of the vessels have joined the system.

Data presented about the Danish coastal fleet comes from the report: **Danish coastal fishing, structure and economy 2013**, Max Nielsen, University of Copenhagen

The Danish coastal fleet

Fisheries management and Coastal vessels:

- The Danish ITQ-system allows all kinds of fishing gear to be used. The most common gears used is trawl and gill netting.
- About 200 vessels have joined the Danish coastal fishing system.

Tab. 2. Antal kommercielt aktive fartøjer under 18 meter fordelt på ikke-kystfisker- og kystfiskerfartøjer

Aktive	Antal ikke-kystfiskerfartøjer					Antal kystfiskerfartøjer						
	2007	2008	2009	2010	2011	Fald (%)	2007	2008	2009	2010	2011	Fald (%)
< 12 m	104	82	89	85	90	-5	178	152	130	108	100	-39
12-15 m	70	74	69	74	66	-6	95	91	83	77	66	-31
15-18 m	73	70	74	72	70	-4	21	23	23	25	25	+19
Totalt	250	230	232	231	226	-11	294	266	236	210	195	-33

Kilde: Fiskeris og Skovforvaltningsstyrelsen.

The Danish coastal fleet

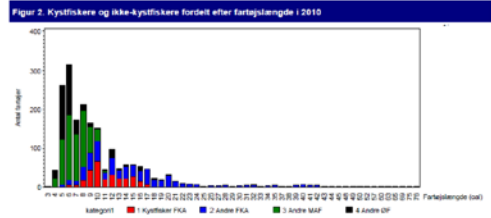
Shares of fish reserved for the coastal fishing system 2014:

- 2,24 % of Cod in the North Sea (105 ton)
- 3,08 % of Cod in Kattegat
- 4,77 % of Cod in Skagerrak (151 ton)
- 5,81 % of Cod in the Baltic Sea (432 ton)
- 2,13 % of Sole in the North Sea
- 4,40 % of Sole in Skagerrak and Kattegat
- 4,00 % of Plaice in the Baltic Sea
- 2,59 % of Plaice in Kattegat
- 2,20 % of Plaice in Skagerrak

The extra allowances allocated from 2007-2011 amounted to 13-20 mill. DKK annually. This averages to about **50,000 DKK (6.700 €)** for each vessel and 6.3% of the inshore fishermen turnover.

The Danish coastal fleet

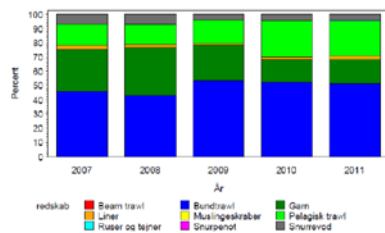
In 2010 there were 2.826 registered boats in total in the Danish fishing fleet.



The Danish coastal fleet

Gear used by the coastal fleet compared to landings (Kilos)

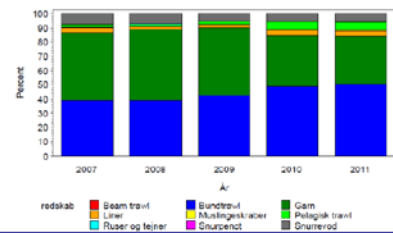
Figur 3. Redskabsfordeling af landingen (kg) for kystfiskere. Redskab: landing kategori: Kystfisker



The Danish coastal fleet

Gear used by the coastal fleet compared to earnings (DKK)

Figur 4. Redskabsfordelingen af landingsværdi (kr.) for kystfiskere. Redskab: landingsværdi kategori: Kystfisker



The Danish coastal fleet

Employment in the coastal sector:

1,159 full time fishermen were employed in the fisheries in Denmark 2010, 18% of those working in coastal fishing and 44% in fisheries with vessels less than 18 meters. Inshore fishing and fishing vessels less than 18 meters, is contributing significantly to the fishing employment, but only modestly to earnings.



The Danish coastal fleet

Value 2011:

Total landed value for the Danish fleet 2974 mill. DKK (400 mill. €)
Total coastal fleet 254 mill. DKK (34 mill. €)
Coastal fishing system about 100 mill. DKK (13,5 mill. €)

Tab. 6. Omsætning af aktive danske fartøjer i 2011, fordelt på fartøjslængde og fartøjslængde, mio. kr.

Fartøjslængde	Fartøjslængde (meter)								Totalt
	<12	12-13	13-14	14-15	15-16	16-17	17-18	>18	
Kystfiskerfartøjer									
1 dag	78	21	20	38	17	27	0	0	201
2 dage	3	3	2	10	2	1	0	0	27
3 dage	1	1	1	5	1	0	0	0	14
>3 dage	1	0	0	0	0	0	0	0	1
Totalt	82	25	23	53	20	28	0	0	254
Andre fartøjer									
1 dag	61	18	17	30	16	36	24	158	310
2 dage	2	2	2	10	10	10	20	152	217
3 dage	0	1	1	6	7	16	20	194	245
>3 dage	0	0	0	0	0	0	0	1.811	1.811
Totalt	63	21	20	46	33	62	44	2.315	2.773
Totalt	145	46	43	99	53	90	44	2.315	2.826

Note: Hættede tal omregnet from ards tonner til salg til omkring 7,24 og tallet ned til nærmeste helt. Fartøjer der ikke er registrerede har blot fået 1 dag pr. år.

The Danish coastal fleet

Very bad economy in the coastal fleet!

The rapport conclude:

small vessels have a very low income and in many cases a negative return year after year. Fishing with smaller vessels especially under 15 meter can not be compared to bigger vessels where external capital have to give a return.

Fishermen in small boats either accept low pay, do not get a return on the capital or must have unregistered income to survive.



The coastal fleet and regional development

Kreds Nord



The coastal fleet and regional development

The coastal fleet are very dependent on healthy fish stocks close to shore as their radius of action often is limited.

Study about the condition of coastal fish stocks in Danish waters

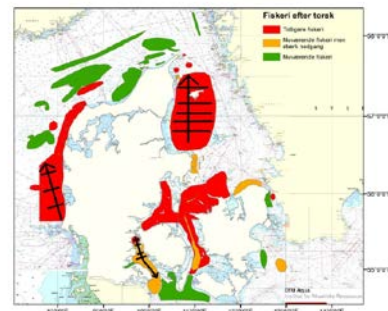
74 fishermen
Gill Net 49
Trawl 23
Danish Seine 2

Cod 60
Plaice 52
Sole 29
Turbot 14



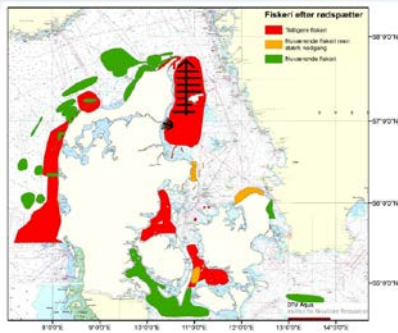
The coastal fleet and regional development

COD



The coastal fleet and regional development

PLAICE



Strategies in place to support the coastal fleet and regional development

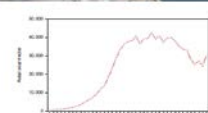
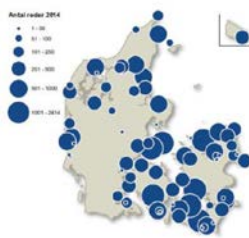
The Danish government allocates fishing rights to support the coastal fishery:

The coastal fishing system where vessels under 17 meter can apply and get a little more fish. vessels with gill net, longlines, pelagic trawls, danish seines purse seine and pots gets 50 % more supplement per. quota share compared to vessels using trawl or beamtrawl.

- 2,24 % of Cod in the North Sea (105 ton)
- 3,08 % of Cod in Kattegat
- 4,77 % of Cod in Skagerrak (151 ton)
- 5,81 % of Cod in the Baltic Sea (432 ton)
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- 2,20 % of Plaice in Skagerrak

Strategies in place to support the coastal fleet and regional development

Regulation put in place to limit the population of the great Cormorant.



What is the future of the coastal fleet and coastal communities

The coastal fishery in Denmark is under pressure

The bigger coastal communities will survive because the larger vessels are using the same ports as the small ones, but the small harbors with only small vessels will in few years shutdown.

Consolidation is also happening in the Danish coastal sector. Must often when a smaller coastal boat is sold, this will be to a bigger vessels that don't fish in coastal waters.



What is the future of the coastal fleet and coastal communities



Main problem - Fish are disappearing from the coastal waters maybe into deeper water.

- Only a few places left in Denmark where there close coastal fishing is good

Why this is happening is not known in details but seals and cormorants are known to eats big quantities of fish on a daily basis and the populations of these animals are very big again.



 **norden**
Working Group for Fisheries Co-operation (AG-Fish)

 **DANMARKS FISKERIFORENING**

27/06/2014

14

 **norden**
Working Group for Fisheries Co-operation (AG-Fish)

 **DANISH FISHERMEN**

Thank you for your attention

7 The Faroese coastal sector

Durita Djurhuus, Syntesa

Auðunn Konráðsson, Meginfélag Útróðramanna

Vessels under 15 meters are considered coastal vessels in the Faroe Islands. There are in total 542 coastal vessels in the Islands, 327 of which are reporting catches and only 35 that are fully operational i.e. with catch values exceeding 54 thousand Euros.

The demersal stocks that the coastal fleet depends on are in critical condition, which is why the sector is struggling for survival. Total catches in 2013 amounted to only 4 thousand tons, valued at 7 million Euros. Cod catches of the coastal fleet were just under 1.700 tons in 2013, but in 2002 they amounted to 12.000 tones.

The Faroese fisheries management system is based on effort quotas and due to the poor condition of the demersal stocks the coastal fleet was only allocated 11.600 fishing days in 2013, compared to 33.600 in 1997.

Due to the above mentioned situation, the importance of the fleet for the national economy has diminished and today there are only around 80 fishermen working full time in the sector. If the stocks do not recuperate soon the sector will most likely continue to shrink and young people will most certainly not choose coastal fisheries as a profession.

Following are the slides to Durita's presentation.




Durita Djurhuus from Syntesa in the Faroe Islands

Kystsamfund
Conference on
Coastal fisheries and coastal communities in the N-Atlantic
Held at Simrum in Kópavogur on 27.09.2014


Faroe Islands

Durita R. Djurhuus
Auðunn Konráðsson

Working Group for Fisheries Co-operation (AG-FIK)

Content of the presentation

The presentation will focus on the following issues:

1. The Faroese coastal fleet
2. Significance of the coastal fleet for regional development
3. Strategies in place to support the coastal fleet and regional development
4. What is the future of the coastal fleet and coastal communities



Working Group for Fisheries Co-operation (AG-FIK)

27.09.2014

The Faroese coastal fleet

What is a coastal vessel?

The Faroese Law of Commercial Fishing defines 6 vessel groups of which no 4 partly and no 5 includes the coastal vessels:

Vessel group	Definition
4A	Larger vessels 15-40 GT and < 15 m
5A	Smaller vessels < 15 GT and < 15 m Minimum annual landing value of DKK 400.000 / € 54.000
5B	Smaller vessels < 15 GT and < 15 m

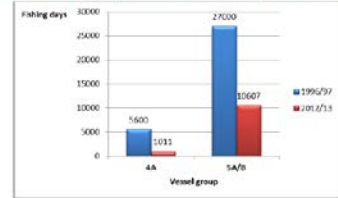
Authorized fishing gear for coastal vessels is jig and long line

The Faroese coastal fleet

Terms in coastal sector?

The National System of Fishing Days in Faroese Waters
➢ Maximizing input/output

Allocated fishing days to coastal fleet 1996/97 and 2012/13



The Faroese coastal fleet

In 2013 there were 542 registered coastal vessels <15 meters and <40 GT

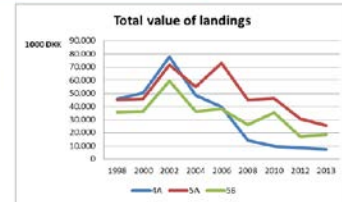
Vessel groups	Licences assigned / vessels reporting catches / fully operational
4A Larger vessels < 15 m < 40 GT	10 / 7 / 4
5A Smaller vessels < 15 m < 30 GT	39 / 39 / 20
5B Smaller vessels (leisure mainly) < 15 m < 30 GT	493 / 281 / 11
Total coastal vessels	542 / 327 / 35

Total number of coastal vessels fully operational (annual catch value of minimum 400.000 DKK / 54.000 €) is 35 vessels in 2013

The Faroese coastal fleet

Volume and value of catches:

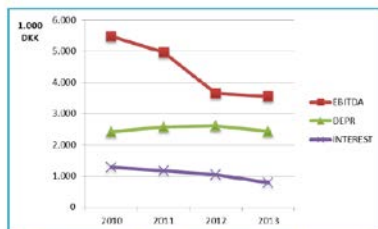
Top 3 species	2002	2013
Cod	11.954 t	1.696 t
Haddock	4.589 t	803 t
Saithe	294 t	609 t



The Faroese coastal fleet

Financial operating environment:

The economic situation for fully operating vessels from 2010-2013



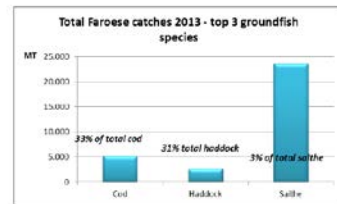
Based on numbers from 19 coastal vessels in 4A and 5A/B

The Faroese coastal fleet

The significance of the coastal sector 2013:

Total catches coastal vessels Faroese waters: 4.295 t (1,06% of total catches) !
Landed value: 7 mill. € / 51.629 mill. DKK (3 % of total) !

- Landed value cod and haddock: 32% and 35% of total
- Significant!

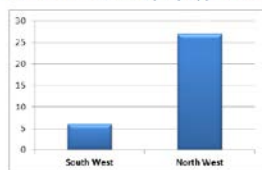


The coastal fleet and regional development

The regional distribution of the coastal fleet:

Less and less basis for activity in SW region (MES)
- no initiatives for regional job job creation in sector

Share of coastal vessels (fully op) in each region:



The Faroese coastal sector

Employment in the coastal sector:

Most fishing vessels in the coastal vessel sector are owned by individuals or by a registered company/one person company.
For the larger vessels in 4A there are on average 3 employees associated with the boat and the smaller vessels in 5A and 5B 1 and 2 persons associated.

Full time employees directly attributable to the coastal vessels is estimated to be around 70-80 FTE's.



The Faroese coastal fleet

What becomes of the catches (estimates):

Haddock

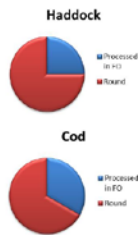
1/4 of haddock is processed in FO for domestic market.
3/4 is exported as round fish – mainly to the UK market.

Cod

1/3 of cod is processed in FO for domestic market and export. 2/3 of cod is exported as round – mainly to France, German and the UK market.

Max added value?

- vessels get a relatively good price on auction
- transport + logistics is effective and not too costly – value chain rewarded!



Strategies in place to support the coastal fleet and regional development

Currently there are no specific strategies in place!

Main challenges:

- Insufficient fish stocks in Faroese waters (cod and haddock)
- Large proportion of closed areas to protect spawning stocks – cod / haddock
- Extremely difficult to obtain MES in the sector

Discussion points:

- Access to restricted areas for selected vessels (under close monitoring/rotating scheme)
- Financial support to fully operational vessels to survive extreme fluctuations
- Share in extra ordinary resources i.e. mackerel
- Access to fishing grounds in neighboring territories ..

What is the future of the coastal fleet and coastal communities

Development characteristics for coastal sector:

- Fully professional coastal fishing in severe decline
- Youth is not entering the sector
- Leisure or non professional fishery is increasing
- Tourist vessels (concepts) are increasing



➤ *Not many positive future prospects – small part of the fleet is hanging in there but questionable for how long*



8 The Greenlandic coastal sector

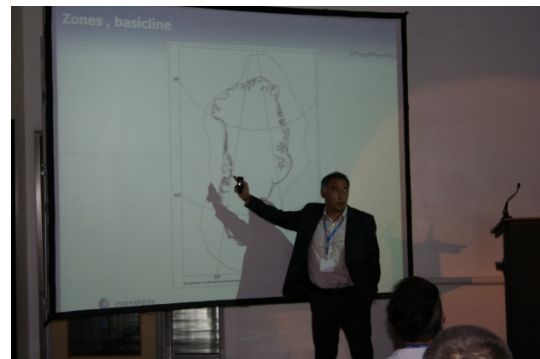
Tønnes Berthelsen, KNAPK

There are 310 Greenlandic fishing vessels registered in the Danish Maritime Authority's registry, 294 of which are classified as coastal vessels, which means that they have licenses to fish within 3 NM of baseline (line drawn between uttermost Islands or coast line) and are under 120 GT in size. In addition there are about 1.500 dinghies that are not registered, but have though fishing licenses. These dinghies are for example fishing for Greenland halibut (825 licenses issued) and lumpfish (610 licenses issued). Total catches of the coastal fleet amount to almost 100 thousand tonnes, but half of that volume are shrimp, which are caught by larger vessels which are though defined as coastal vessels, because they are allowed to fish within the baseline.

The coastal fisheries 107 million Euros into society in 2013, which makes it hugely important for regional development. For the smaller vessels the main opportunities are in Greenland halibut and lumpfish. The lumpfish fishery is currently being evaluated for MSC certification, which high fishermen are hoping will make the fishery more profitable. There are also indications that the cod stocks will significantly increase in the next few years, which could make that fishery profitable. At the moment the cod fishery is not returning profits and few fishermen are interested in entering the fishery.

One of the main challenges the coastal fleet is facing in Greenland is a monopoly in the processing sector and very difficult logistics. If the coastal sector is to flourish these challenges will have to be addressed.

Following are the slides to Tønnes's presentation.



Tønnes Berthelsen from KNAPK in Greenland



The Greenland coastal fleet

What is a coastal vessel?

Coastal fishery or vessel in Greenland terms is:

Offshore trawlers can operate into the basic-line. Basic-line is a line from uttermost island/coast to uttermost island/coast

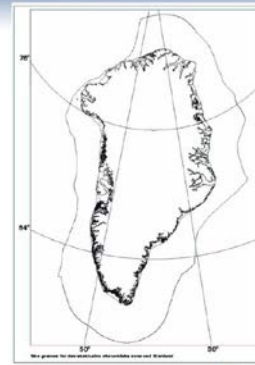
Coastal fleet can operate to 3 NM from basic-line
(Foreign vessels holding a quota can operate into the 12 NM line)

Coastnear vessel can be a maximum of 120 GT or 75 GRT (Gov. Act no 18, 1996)

Mandatory to land catch



Zones, baseline



Greenland coastal fleet



The Greenland coastal fleet

Municipality division



Municipality	Number of GR vessels	Age	Offshore vessels
Kujataa (south)	38	43,9	1
Sermersooq	96	42,3	10
Qaqqata (Mid)	63	46,9	2
Qaasuitsup (North)	107	44,0	3
Total	294		16

Dinghies

Greenland Halibut 825 licensees < 6 m.
Lumpfish 610 licensees in 2013 fewer this year though
1.500 qualified estimation

17 cities 57 settlements



Coast near fisheries' quotas

Shrimp

43 % of TAC

Greenland halibut

Inshore

3 management areas total approx. 25,500 m.t.

Cod

15,000 m.t.

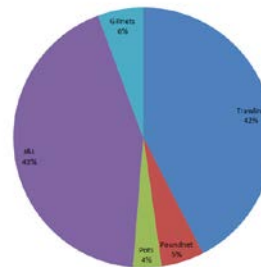
Snowcrab

2,550 m.t.

Lumpfish, catfish, capelin



Gear distribution



Significance of coastal fleet for regions

Greenland fish & shellfish exports 2013 totals DKK 2.5 bill (Euro 335 m)

Coastnear fisheries generated DKK 800 m (Euro 107 m) into society

Divided into municipalities (DKK), share, % of inhabitants:

North	542 mio	66.6 %	31.2 %
Mid	102 mio	12.5 %	17.1 %
Cross Ice cap	142 mio	17.4 %	39.0 %
South	12 mio	1.5 %	12.7 %



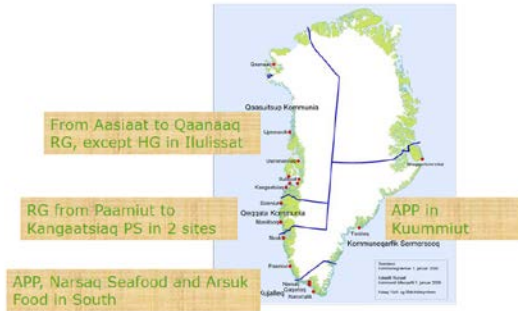
Strategies in place to support the coastal fleet and regional development

- Last election March 2013, new regime inaugurated
- Regime 2009 – 2013 abolished subsidies to settlement plants, new regime adopted that too. Size < DKK 8 mio
- Strategy relies on private entrepreneurship
- Regime have allocated funds for which municipalities can apply, however mainly for unemployment reduction initiatives like maintenance on dwellings = short term solutions
- No quota allocations to regions except 1 example cods of 2,500 m.t. to be delivered to 2 plants in south

- So, no really strategy !



What is the future of the coastal fleet and coastal communities



Cont.

Monopolies are big challenges

Ensuring funds on the Finance Act
Condemnation (?)
support modernization

Mandatory to land ?



9 The Newfoundland and Labrador coastal sector

Heather Manuel, Centre for Aquaculture and Seafood development / Fisheries and Marine Institute of Memorial University of Newfoundland

David Decker, Fish Food & Allied Workers

There were 6.958 coastal vessels (under 20 meters / 65 feet) registered in Newfoundland & Labrador (NL) at end of year 2013. Of those 4.769 reported catches. The vessels can range between 1-150 registered tonnage, but the mainstay of the boats range from 11-15 tonnes and 85% are under 35 feet (10.6 meters).

The coastal fleet's landings in 2013 amounted to 191 thousand tonnes, valued at 390 million CAD. Crustaceans and shellfish are by far the most important species with snow crab accounting for 54% of the value and shrimp for 20%. The most important demersal species is turbot, which in 2013 produced 11 thousand ton landings, valued at 53 million CAD. The cod stock

used to be of significant importance, but since the stock collapsed in the beginning of the 90's the cod fishery has been of little importance. It is though expected that the cod stock will be returning to its former "glory" in the near future, which will require restructuring and considerable investment for the sector as a whole if it is to reap the benefits. Fishing rights are allocated to areas, which makes the coastal sector highly important for regional development.

NL fish harvesters were 9.500 in total in 2013 compared to 16.500 in 1998. About 12% of the harvesters in 1998 were over the age of 55, but today 28% are over that age. Coastal fishermen are reducing in number and they are becoming older i.e. little recruitment. The same story can be told about fish processing where plant workers have reduced from 21.000 down to 8.400 during that same period. The government has supported the coastal sector by invoking a so called owner-operator-principle, which stakes that the owner needs to be an active fishermen. There is also a so called minimum processing requirements on harvested products in effect that ensures that harvest benefit people working in the fish plants.

Following are the slides to Heather's and David's presentation.



Heather Manuel from CASD and David Decker from FFAW in Newfoundland



The Newfoundland and Labrador coastal fleet

What is a coastal vessel?

The Newfoundland and Labrador coastal fleet, for the purpose of this discussion, is comprised of small commercial fishing vessels <20 metres (65 feet).

A "fishing enterprise" is defined as an authorized fishing business under which multiple fishing licenses or vessels up to 27 meters (90 feet) operate. Each enterprise is controlled by one owner who directs fishing effort among that owner's vessels and licenses (DFO 2013a).

The Newfoundland and Labrador coastal fleet

As of December 31, 2013 there were 6,958 coastal vessels (Source: DFO, 2013)

In total, 4,769 Coastal Vessels produced landings in the 2013 fishing year (Source: DFO, 2013).

More than 80% of the coastal fleet is constructed of fiberglass and wood.

Registered tonnage ranges from <1 up to 150; most however are in the range of 11-15 tonnes

The Newfoundland and Labrador coastal fleet

Number of Registered Inshore Vessels
as of December 31, 2013 (Source: DFO, 2013)

NAFO	<35'	35' to 64'11"	65' to 89'11"	Grand Total
2J	207	34	2	243
3K	1592	244	2	1838
3L	1794	397	5	2196
3PN	130	15		145
3PS	1058	192		1250
4R	1138	155		1293
Grand Total	5919	1039	9	6967

The Newfoundland and Labrador coastal fleet

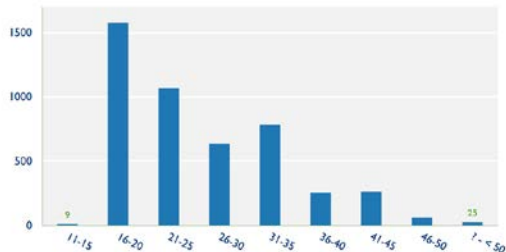
Active Vessels 2013
(Source: DFO, 2013)

	2J	3K	3L	3PN	3PS	4R	Grand Total
Inshore <35	92	1099	1041	71	699	784	3786
Nearshore 35-89	39	221	397	13	186	136	992
Grand Total	131	1320	1438	84	885	920	4778



The Newfoundland and Labrador coastal fleet

Figure 4. Coastal Fleet Distribution by Vessel Length Range, 2012.



The Newfoundland and Labrador coastal fleet

TAC, Landings (tonnes) & Landed Value (\$ Cdn) for 2013

(Source: DFA, DFO Statistics)

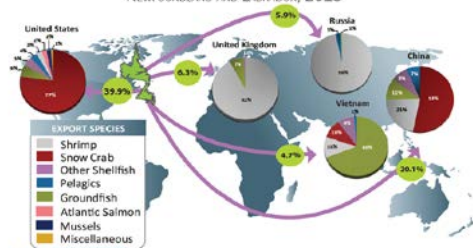
Species	TAC (tonnes)	Landings (tonnes)	Value (\$,000)
Snow Crab	52,287	50,806	209,210
Gulf Shrimp	6,115	6,115*	9,500*
Northern Shrimp	44,287	44,287*	68,000
Lobster		2,207	17,348
Whelk		4,329	6,125
Northern Cod	13,000	8,066	9,061
Turbot		10,981	52,654
Herring	30,721	29,575	9,780
Mackerel	36,000	5,145	2,496
Capelin	36,711	30,070	6,628
TOTAL		191,581	390,802

*Values are estimated

The Newfoundland and Labrador coastal fleet

Figure 6. Newfoundland & Labrador Fishery Exports, Top Five Export Countries by Value, 2013 (DFA 2014, 15).

TOP FIVE WORLD MARKET DESTINATIONS FOR SEAFOOD PRODUCTS
NEWFOUNDLAND AND LABRADOR, 2013



The coastal fleet and regional development



Total Companies	86
Total Plants	111
Total Buyers	27
Included Communities	99

The coastal fleet and regional development

Age of Workers			Annual Income	
Fish Harvesters			Fish Harvesters	Income (\$ Cdn)
Year	Age < 25	Age 55+	Year	\$ per year
1990	2,200	2,000	1990	14,572
2010	500	2,700	2013	32,050
Plant Workers			Plant Workers	
Year	Age < 25	Age 55+	Year	\$ per year
1990	5,370	1,500	1990	16,140
2010	1,340	2,600	2010	26,840

- Workers are aging; younger workers are leaving

Summary of NL Coastal Fishery & Regional Development

	1998	2013
Vessels	11,200	~ 4,500
Plants	211	111
Harvesters	16,500	~9,500
Plant Workers	21,000	~8,400
Fishery Value	\$400 million	\$600 million
Market Value	\$800 million	\$900 million

- Plant workers include aquaculture and capture fisheries
- \$ Value includes inshore and offshore fisheries
- Although # of vessels, plants and workers have decreased, \$ value has increased.

Strategies in place to support the coastal fleet and regional development

- Current regulation in Canada is intended to restrict who has able to control a fishing enterprise – owner-operator principle.
- Requirement of residency in the region in which quota allocation is held.
- Minimum Processing Requirements on harvested product ensures that harvest also is to the benefit of people working in the fish plants of Newfoundland and Labrador. This often provides the families of the harvesters with a second income from the fishing industry

Strategies in place to support the coastal fleet and regional development

- Three Case Studies of Special Allocation
 - Labrador Fishermen's Union Shrimp Company
 - Allocation has been economic driver for the Southern Coast of Labrador. Quota lease revenue has been utilized to invest in the inshore fisheries sector
 - St. Anthony Basin Resources Inc.
 - Has rejuvenated a significantly contracting area of the province. Special allocation has been used to fund a fish processing plant and cold-storage facility
 - Fogo Island Co-Operative Society Ltd.
 - Special allocation of offshore quota was key in the process of establishing a shrimp processing facility in the region.

Income from Special Allocations has been at the core in establishing facilities within these three regions. With processing facilities the product landed by the inshore fleet provides direct employment in the local areas



What is the future of the coastal fleet and coastal communities

- If government supports owner-operator, current licensing conditions and fleet separations, coastal communities are given the opportunity to continue to thrive and prosper.
- Protection of the owner-operator policy is the best assurance that the benefits of the harvesting activity remain in the coastal communities.
- Corporate interests and sometimes government policy appears to rely heavily on the economies of scale which mostly results in greatest benefit for the few.

THANK-YOU

10 The Icelandic coastal sector

Jónas R. Viðarsson, Mátís

Sveinn Agnarsson, University of Iceland

Halldór Ármannsson, the National Association of Small Boat Owners

Vessels that are less than 15 meters in length and 30 GT are considered coastal vessels in Iceland. The fleet consists of roughly 1.800 vessels (total number of vessels in Iceland are about 2.300) of which 1.248 reported catches in 2013.

The coastal fleet is operating within a number of systems but in total little under 20% of allocated TAC of demersal species are distributed to coastal vessels. Almost 90% of the coastal fleet consists of vessels under 10 meters, but the mainstay of the catches are caught by vessels between 10 and 15 meters. In 2012 the coastal fleet landed 83 thousand tons of catches valued at 172 million Euros, which was 17% of total landing value of the Icelandic fishing fleet.

There are 4.900 full time fishermen in Iceland of which 25% are on coastal vessels. The coastal fleet is hugely important for regional development and many of the smaller fishing villages around the country depend almost entirely on the sector for survival. The government is aware of this and has actively favoured the coastal sector for decades, allocating special regional quotas and political “pots” to the smaller vessels.

The coastal sector in Iceland in many respects become a big industry in recent years, where consolidation and optimisation has been implemented. Today 42% of the coastal quotas (in the Jig and line system) are owned by the 15 largest companies in the coastal sector. It is likely that this aggregation of quotas will continue, with increasing investments in boats, gear and equipment. At the same time it is unavoidable that traditional coastal fishermen i.e. one man family owned companies will struggle and cease operation.

Following are the slides to Jonas’s, Svein’s and Halldór’s presentation.



Jónas R. Viðarsson from Mátís in Iceland



Jonas R. Viðarsson (Matis)
Sveinn Agnarsson (UI)
Halldór Ármannsson (NASBO)

norden
Working Group for Fisheries Co-operation (AG Fisk)



norden
Working Group for Fisheries Co-operation (AG Fisk)



020426 1

The Icelandic coastal fleet

What is the definition of a coastal vessel in Iceland?
There have been made attempts to define the term "coastal vessel" amongst international stakeholders. But they have been unsuccessful. Coastal vessels are therefore defined differently depending on countries and conceptions of people.

There is no official definition for coastal vessels in Iceland, but for the purpose of this discussion the Icelandic coastal fleet has been defined in accordance with size restrictions in the fisheries management Act, for vessels eligible for jig and line quota

<15 meters and <30 GT

one definition is that boats landing daily should be defined as coastal vessels. We have chosen not to use that definition.

The Icelandic coastal fleet

Icelandic fisheries management is based on ITQs, where the coastal vessels are either a part of the larger ITQ system like any other fishing vessels or they are in a separate system solely available for <15 m and <30 TG jig or line vessels (J&L).

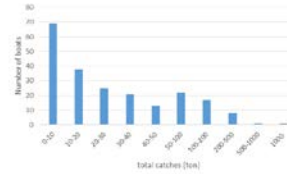
81% of the demersal quotas are allocated to the larger ITQ system 12% to the J&L system and 7% to special arrangement "political pots"



The Icelandic coastal fleet

Coastal vessels in the larger ITQ system:

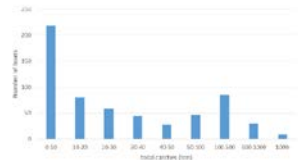
There are 150 coastal vessels in this category, most of which have relatively small catches with only 27 vessels exceeding 100 ton yearly catches. Vessels in this category with the most catch are gillnetters.



The Icelandic coastal fleet

Coastal vessels in the J&L system:

The coastal vessels in this category are 853 in total and amongst them are some of the most efficient small boats in the world. Capable of reaching up to 30nm, some have auto-line systems with up to 25 thousand hooks and the most efficient vessels catch close to 2,000 thousand tons a year and 125 vessels exceed 100 ton annual catches.



The Icelandic coastal fleet

In 2013 there were 1.922 registered boats <15 meters and <30 GT
1.248 of those reported catches

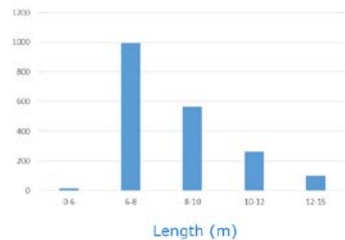
These boats have fishing licence with in the:

- The larger Individual Transferable Quota system (ITQ)
- The Jig and Line system (J&Ls)
- The coastal jigging system
- The Lumpfish system
- Leisure fishing

Type of license/vessels reporting catches	
Total number of registered vessels / vessels reporting catches	2.287/1.828
Total number of registered "coastal vessels" / vessels reporting catches	1.922/1.248
J&Ls licenses / J&Ls with reported catches	853/605
J&Ls with permanent J&L quota	254
Small vessels in ITQ system with licenses / with reported catches	150/126
Small vessels in ITQ system with permanent quota	87
Lumpfish licenses / vessels reporting catches	444/297
Leisure fishing licenses	46
Tourist vessels with J&Ls licenses	33

The Icelandic coastal fleet

Size / length distribution of the coastal fleet:



The Icelandic coastal fleet

Employment in the coastal sector:

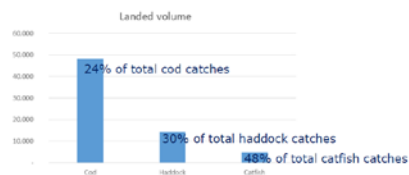
4.900 full time fishermen were in Iceland 2012, which is around 2,9% of the workforce. Of those 1.240 (25%) were employed on small coastal vessels. In addition considerable number of employees were working part time on small coastal vessels, for example within the Coastal Jigging system.



The Icelandic coastal fleet

Volume and Value 2012:

Total catches: 82.712 t. (5.6% of total landings)
Landed value: 172 mill. € / 26.600 mill. ISK (17% of total)
Estimated export value: 343 mill. € / 53.000 mill ISK (19,7% of total)



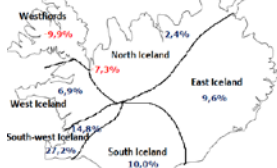
The Icelandic coastal fleet

Operating environment for the small coastal fleet in Iceland has been highly unstable

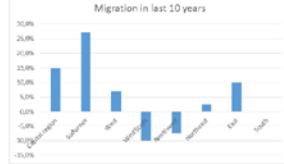
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Revenue	180,0%	160,0%	160,0%	160,0%	150,0%	130,0%	130,0%	130,0%	130,0%	130,0%
Wages	43,1%	43,1%	33,8%	33,8%	34,4%	34,4%	34,4%	34,4%	34,4%	34,4%
Oil	2,1%	2,1%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Fuel/jigger	6,1%	2,3%	8,2%	1,0%	7,2%	5,3%	5,0%	3,4%	4,8%	1,9%
Refrigeration	0,7%	0,1%	0,1%	5,2%	0,7%	0,7%	0,7%	0,7%	0,8%	0,8%
Office cost	1,9%	2,9%	0,4%	0,4%	0,7%	0,7%	1,0%	1,0%	1,0%	1,0%
Insurance	0,9%	5,1%	1,0%	1,0%	1,0%	1,0%	2,0%	2,1%	2,7%	1,6%
Costs of sale	0,8%	0,7%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Other costs	22,1%	22,1%	22,1%	22,1%	22,1%	22,1%	22,1%	22,1%	22,1%	22,1%
Profit	88,1%	88,1%	88,1%	88,1%	88,1%	88,1%	88,1%	88,1%	88,1%	88,1%
EBITDA	18,7%	0,0%	17,4%	24,0%	12,2%	12,2%	12,2%	12,2%	12,2%	12,2%
EBIT	24,0%	2,1%	5,0%	5,0%	5,0%	5,0%	5,0%	5,0%	5,0%	5,0%
EBE	5,7%	5,4%	5,3%	12,2%	2,1%	2,1%	2,1%	2,1%	2,1%	2,1%
EBITDA	-15,1%	-0,4%	0,5%	-0,5%	-1,8%	-0,9%	0,1%	0,4%	0,5%	-0,8%

The coastal fleet and regional development

Population development



Region	Population	%	Migration in last 10 years
Capital region	208,752	64%	14.80%
Suburmes	21,560	7%	27.20%
West	15,442	5%	6.90%
Westfjords	6,972	2%	-9.90%
Northwest	7,245	2%	-7.30%
Northeast	29,091	9%	2.40%
East	10,537	3%	9.60%
South	26,253	8%	10.00%

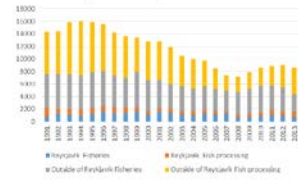


The coastal fleet and regional development

Population development



Number of jobs in fishing and processing sectors

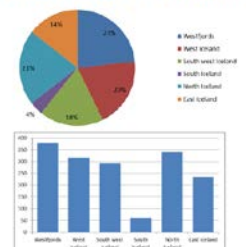
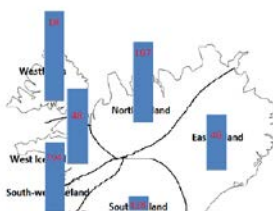


The coastal fleet and regional development

The regional distribution of the coastal fleet

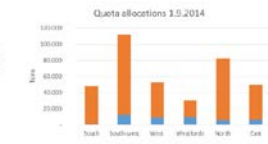
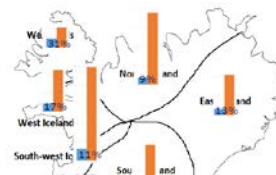
Persons for each coastal vessel in the region

Portion of coastal vessels in each region



The coastal fleet and regional development

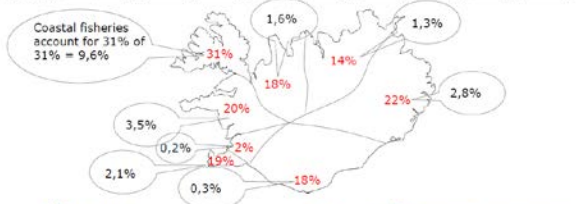
Quota allocations to coastal vessels and other fleet types*:



The coastal fleet and regional development

Contribution of different sectors according to area (2011)

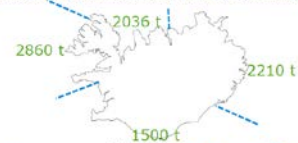
	Capital	Suburmes	West	Westfjords	North(west)	North(east)	East	South	Total
Seafood industry	2%	10%	20%	31%	18%	14%	22%	18%	8%
Heavy industry	3%	3%	2%	1%	2%	6%	21%	6%	7%
Other industry	8%	0%	0%	3%	5%	7%	0%	0%	7%
Construction	4%	7%	4%	5%	8%	8%	7%	7%	5%
Trade and transport	28%	15%	12%	11%	10%	11%	11%	13%	23%
Banking and services	31%	18%	15%	10%	10%	22%	16%	18%	27%
Public service	22%	20%	19%	22%	24%	26%	15%	22%	21%



Strategies in place to support the coastal fleet and regional development

Regional Quota system

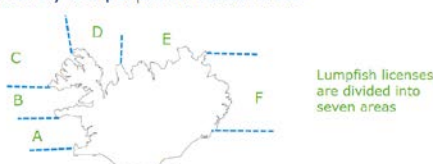
- Government allocates fishing rights to support communities suffering from setbacks such as stock collapses and loss of quotas from individual municipalities. 10,500 t, where most is caught by coastal vessels.
 - 8,200 t to municipalities
 - 2,300 to the Regional development institute
- Coastal jiggers are awarded 8,600 tons in an Olympic fishery during May-August



Strategies in place to support the coastal fleet and regional development

Long-line concession

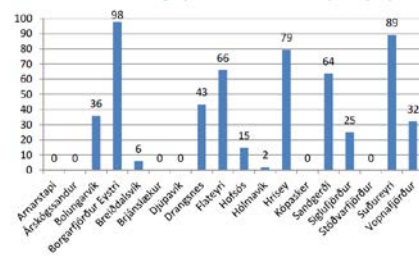
- Long-liners day boats using manual baiting on land are allowed to land extra 20% to their quota.
 - This "pol" contains 5.175 tons (3.375 t cod, 1.100 t haddock and 700 t catfish)
- The Lumpfish fishery is important for certain areas



Strategies in place to support the coastal fleet and regional development

What becomes of the catches?

Share of landings processed in home port (%)



What is the future of the coastal fleet and coastal communities



Consolidation in the coastal sector where larger entities are acquiring a large part of the H&L quotas.

- The 15 largest quota holders were in possession of 42,2% of the J&L quota in the 2013/14 fishing year
- The larger entities invest heavily in vessels and quotas
- Likely to see similar development as in the larger ITQ system, which can eventually have problematic results for some coastal communities

Opportunities in the tourist industry and coastal fisheries

Company	%
1 Stak-konk ehf.	7,3
2 Jakobs Valgeir ehf.	4,2
3 Nona ehf.	3,8
4 GPG Seafood ehf.	3,3
5 Sigurbjörg ehf.	2,8
6 Einhamar Seafood ehf.	2,8
7 Sæfell ehf.	2,6
8 Grunnur ehf.	2,4
9 Kleifar ehf.	2,3
10 Salting ehf.	1,9
11 Nesver ehf.	1,9
12 Blaknes ehf.	1,9
13 Úgerðarf. Sandg.	1,8
14 Marver ehf.	1,6
15 Borgarhöfði ehf.	1,6
Total	42,2

11 Presentation on the project “Employment and salary of Nordic coastal fishermen”

Staffan Waldo and Johan Blomquist, the Swedish AgriFood economics centre (SLU)

Max Nielsen, Department of food and resource economics at the University of Copenhagen (IFRO)

Staffan Waldo introduced a Nordic project titled “Beskæftigelse og aflønning af nordiske kystfiskere” which has just started. The objective of the project is to collect and analyse data on salaries and employment in coastal fisheries in Iceland, Norway, Sweden and Denmark. The aim is then to compare salaries across sectors to see how competitive the coastal sector is in comparison with other sectors regarding salaries and employment. There are already indications from previous studies done in Denmark that suggest that wages are low in the coastal sector and preliminary results from Sweden that many coastal fishermen have income from other sources than fisheries. At the same time other fishing segments are doing much better using the same resource.



Staffan Waldo from SLU in Sweden

The slides from Staffan’s presentation are presented below.



Employment and salary of Nordic coastal fishermen

Max Nielsen, University of Copenhagen, Denmark
Staffan Waldo and Johan Blomquist, AgriFood Economics Centre/SLU, Sweden

Fishermen go ashore, Carl Locher, the Skagen Painters, 1885



Coastal Fishery anno 2012



Background

Denmark	2010	Active ves- sels (2011)	Employment (full time)	Turnover (DKK Mill.)	Earning (DKK Mill.)	Rate of return
Coastal vessels		199	209	254	286	1.4%
Other vessels < 18 m		227	306	404		
Vessels > 18 m		242	644	2.316	1.286	9.8%
Total		668	1.159	2.974	1.533	7.8%

↓
Less active 1.003
Inactive 1.116

❑ Rate of return high at large vessels, low at small vessels

❑ If coastal vessels are desired, special arrangements needed

Dias 3

Background

Coastal fisheries coexist with other fisheries



Regulation exists to avoid that there are too many fishermen fishing too few fish

- ❑ Regulation
 - TACs ensure fish in the future
 - Other regulations limit no. of fishermen
 - Economically viable (?)
- ❑ Special arrangements maintain quota shares of coastal fishermen
 - Balance large/small vessels
 - Maintain employment
 - Reduced economic outcome

Background

❑ Publicly available statistics do not show the entire picture

❑ Example - Danish employment in fisheries 2010

- 1) Employed 1 November ➔ 2,561 (survey)
 - Neglect season, count heads not involvement
- 2) FT-employment active vessels ➔ 1,159 (working days/220)
 - What is a working day on long fishing trips? Income from other sectors?

The project

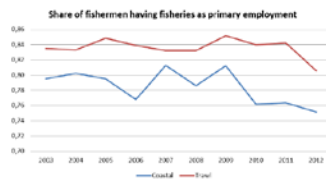
Title: **Salary and employment in Nordic coastal fisheries**

- Purpose
 - To identify salary/employment of coastal fishermen
 - To explain why coastal fishermen stop fishing
- Countries – Iceland, Norway, Sweden, Denmark
- Project partners
 - Max Nielsen, Associate Professor, University of Copenhagen, Denmark (project coordinator)
 - Staffan Waldo, senior researcher and Johan Blomquist, researcher AgriFood Economics Centre, Sweden
 - Frank Asche, Professor, University of Stavanger, Norway
 - Jónas R. Viðarsson, program director, Mafís, Iceland

Some preliminary data from Sweden

Fishing as primary employment

- Definition primary employment: Fishing is the activity with highest share in total income
- Coastal vessels = all other vessels than trawlers



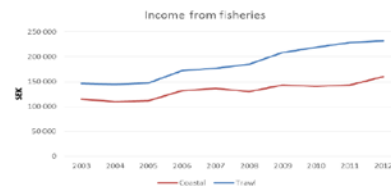
- Approximately 40 % of the coastal fishermen have income from other sectors

The project

- Statistics for individual fishermen that earned income from fisheries
 - Personal income (total all sectors)
 - Household income
- Statistics for individual vessels
 - Vessels information - Length, gear, engine
 - Sale – Landing value and quantity, species
 - Accounts – Turnover, costs, profits
- Data period – the last decade
- Merged via the person/company number
- Sources – National Statistical Offices and Fisheries Ministries

Some preliminary data from Sweden

Income (before tax) from fisheries



- Definition: Income from fisheries for fishermen with fisheries as main income
- Comparison: Wage in manufacturing 2012 is SEK 287,000
 - Coastal fishermen 25-34 years: SEK 278,000
 - Coastal fishermen 35-44 years: SEK 249,000
 - Older coastal fishermen have low income, not the young

Further work

Questions studied in the project

- Do coastal fishermen earn less than in other jobs?
- To what extent is the income of coastal fishermen from fishery?
- What other businesses do coastal fishermen work in (tourism, oil)?
- Why do coastal fishermen stop in business (age, salary, profit)?

Answers important for special coastal fleet management

Nyhavn



12 Eskøy AS

Hrafn Sigvaldason and Bjarni Sigurðsson, Eskøy AS

Bjarni started by introducing the Norwegian fishing company Eskøy AS, which owned by three Icelanders. The company was established in 2007 and owns today two coastal vessels named Saga K and Åsta B, which are run from Tromsø in N-Norway. In 2013 Saga K landed 1.600 tonnes of catches valued at 1.6 million Euros and Åsta B caught 1.300 tonnes valued at 1.4 million Euros. The company employs 22 persons that work on double shifts i.e. 4 weeks on and 4 weeks off.

The operational environment for Eskøy has been favourable, as they have been able to target species such as haddock free from quota. Eskøy owns two 11 meter quotas, which only restrict TAC in cod, but they can more or less catch as much haddock as they want. This has enabled them to keep full operation of both vessels all the year round. The only disadvantage they can point at when running a coastal vessel in Norway is that prices are negotiated in advance through a sales organisation i.e. so called "minstepris". Because of this arrangement prices are rather low and incentives to improve quality are lacking. Average prices in 2013 were for example around 1 Euro/kg whilst average prices at Icelandic auction markets were over 2 Euros/kg.



Bjarni Sigurðsson from Eskøy AS in Norway

Hrafn then made a comparison of starting out with a small coastal vessel in Norway and in Iceland. He first showed that if he were to invest in a modest 10 meter vessel in Iceland and Norway for 16.000 Euros and not buying any quotas (operating in the open coastal system in Iceland and the open group in Norway) he could at best catch around 40 tons a year in Iceland, but 500 tons in Norway. The total value could amount to 70.000 Euros in Iceland whilst the same vessel could land catches valued of up to 470.000 Euros in Norway.



Hrafn Sigvaldason from Eskøy AS in Norway

Hrafn then took another example where he would invest in a top-of-the-line coastal vessel for 1.2 million Euros. If he would then buy a "fullstrukturert" 14-15 meter quota in Norway, which includes 370 tons of cod, 450 tons of haddock, 50 tons of saithe, 15 tons of Greenland halibut and free fisheries in other species, it would cost 1.4 million Euros in Norway. The same cod, haddock and saithe quota in Iceland would on the other hand cost 11 million Euros, and he would in addition have to buy quotas in the other species. It is therefore obvious that it is much easier to start out in the coastal sector in Norway than in Iceland.

Following are the slides to Bjarni's and Hrafn's presentation.

Eskøy AS

- Eskøy AS - Established 7.10 2007
- Small presentation of Eskøy AS
- Experience of driving small coastal vessels in the operational environment in Norway
- Comparison Norway VS Iceland

ESKØY AS

- Established 7. October 2007
- Shareholders: Nordeng AS 40 %, Hrafn Sigvaldason 40 % and Helgi Sigvaldason 20 %
- Owns and drives «Ásta B» T-3-T Build 2009 and «Saga K T-7-T Build 2011
- Quota; two quotas under 11 meter
- Double shifts on board 4 weeks on 4 weeks of
- Total 22 persons working, 20 on board the vessels

"SAGA K" T-20-T OUR FIRST BOAT



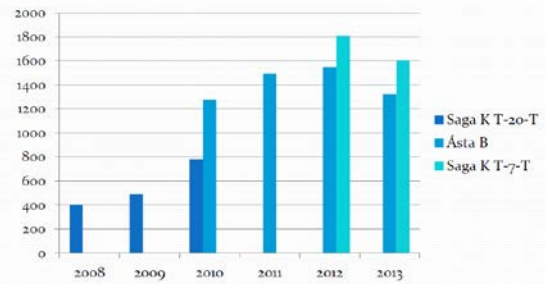
M/S SAGA K T-7-T



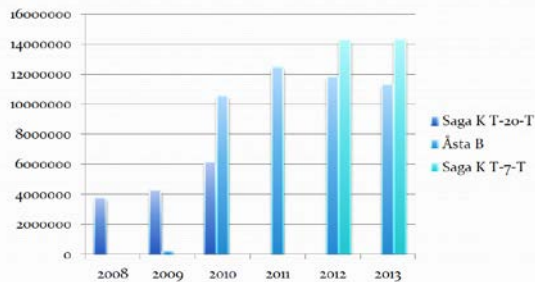
M/S "SAGA K" T-7-T



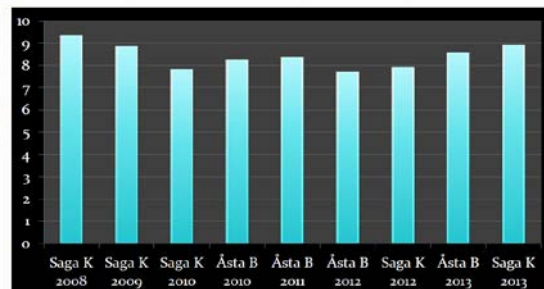
Eskøy AS: Year catch from the beginning



Total catch worth in NOK



Average price (kr/kg Norwegian krona)





"Ásta B" T-3-T & "Saga K" T-7-T In Eidkjosen
Tromsø christmas 2011

Iceland VS Norway

Comparison of starting with a small vessel in Norway
or in Iceland

New 10 meter vessel

Norway

- Vessel costs 2,5 million.
- Registered in open group and receives quota of 25. tonns cod, 12.5 tons Greenland halibut, and free fishing in most other species for example haddock.
- All year round
- Every type of fishing gear
- catch up to 500 tons.
- Catch value up to 4.000.000,-

Iceland

- Vessel costs 2,5 million
- Can register in „Strandveidar“ (cost license system) and can expect to catch up to 40 tons
- Only 1 person per boat , only 800.- kg a day , and 4 days a week. Only jigging
- Catch value up to 600.000,-

New vessel 14,9 meter

Norway

- Vessel cost 10 million
 - Quota price 12 million
 - Cod 370 tons
 - Haddock 450 tons
 - Pollock 50 tons
 - Greenland halibut 15 tons
- Tusk, Catfish, and other species free.

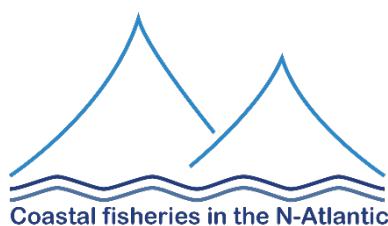
Iceland

- Vessel cost 10 million
- Quota Price 94 million
- Cod 370 tons
- Haddock 450 tons
- Pollock 50 tons
- All other species cost.

Thank you / Takk fyrir okkur



13 List of attendees



Coastal fisheries and coastal communities in the N-Atlantic (Kystfiskeri)

Conference held at the IceFish expo in Iceland 27 September 2014

	Name	Company	Country
1	David Decker	FFAW	CA
2	Heather Manuel	MI	CA
3	Helge Paulsen	AG-Fisk / DTU	DK
4	Henrik S. Lund	DK fisk	DK
5	Auðunn Konráðsson	Meginfélag útróðrarmanna	FO
6	Jákup Mørkøre	Ministry of fisheries	FO
7	Durita Djurhus	Syntesa	FO
8	Hilmar Ogmundsson	Departementet for Finanser og Indenrigsanliggender	GL
9	Therese Lind Benhardt	Departementet for Finanser og Indenrigsanliggender	GL
10	Birgitte Jacobsen	Government of Greenland	GL
11	Katrin Wilhelm Poulsen	Government of Greenland	GL
12	Tönnes "Kaka" Bertelsen	KNAPK	GL
13	Axel Helgason	Bátasmiðjan	IS
14	Gísli Svan Einarsson	Fisk Seafoods / Verið Science park	IS
15	Ásmundur Skeggjason	Höfði-ship brokers	IS
16	Þorsteinn Sigurðsson	Icelandic Marine Research Institute	IS
17	Hjalti S. Mogensen	Libra lögmenn ehf.	IS
18	Arnliótur B. Bergsson	Matís	IS
19	Gunnar Þórðarson	Matís	IS
20	Jónas R. Viðarsson	Matís	IS
21	Kristinn Ólafsson	Matís	IS
22	Lilja Magnúsdóttir	Matís	IS
23	Sigurjón Arason	Matís	IS
24	Sveinn Margeirsson	Matís	IS
25	Valur N. Gunnlaugsson	Matís	IS
26	Grímur Valdimarsson	Ministry of fisheries	IS
27	Sigurður Ingi Jóhannsson	Ministry of fisheries	IS
28	Arthur Bogason	National Association of Small Boat Owners	IS
29	Halldór Ármannsson	National Association of Small Boat Owners	IS
30	Arnór Snæbjörnsson	Ministry of Industries and innovation	IS
31	Geir Oddsson	Norden	IS
32	Elías J. Bjarnason	SAFIR -Skipasala	IS
33	Niels Einarsson	Stefansson Arctic institute	IS
34	Hreiðar Þór Valtýrsson	University of Akureyri	IS
35	Ögmundur Knútsson	University of Akureyri	IS

Name	Company	Country
36 Daði Már Kristófersson	University of Iceland	IS
37 Matthias Kokorsch	University of Iceland	IS
38 Sveinn Agnarsson	University of Iceland	IS
39 Jóhann A. Jónsson		IS
40 Kristín Mogensen		IS
41 Sigvaldi Þorsteinsson		IS
42 Svein Olsen		IS
43 Bjarni Sigurðsson	Eskoy	NO
44 Helgi Sigvaldason	Eskoy	NO
45 Hrafn Sigvaldason	Eskoy	NO
46 Audun Iversen	Nofima	NO
47 Carl-Axel Ottosson	Karlskrona Municipality	SE
48 Staffan Valdo	SLU	SE
49 Bengt Larson	SYEF	SE

