

Seafood industry integration in all EU Member States with a coastline

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Structure of the Presentation

- 1. Methodology**
- 2. Quantitative analysis**
- 3. Country findings**
- 4. Conclusions**
- 5. Recommendations**

1. Methodology

Quantitative analysis

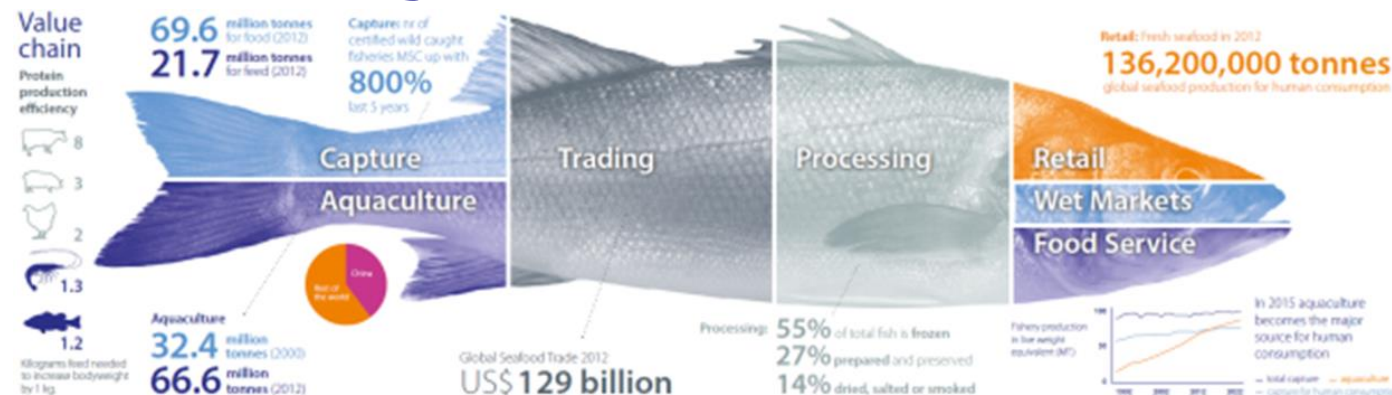
Qualitative analysis

Definition of integration

- Structural vertical integration
- Structural horizontal integration
- Informal arrangements

Company structure analyses

**Stakeholder
interviews**



2. Quantitative analysis

Empirical analysis model:

- Focus on horizontal integration
- Combination of three measures
- Control variables
- Analyse impact on: employment, income & productivity

Findings:

- No. of employees **not affected** by horizontal integration
- Average wages and salaries of total crew **decrease**
- Income from landings, live weight of landings and value of landings **decrease**
- Vessel productivity **decreases** with integration
- Sector productivity is **not affected** by integration

Possible explanations



3. Country findings: Example 1

Highly integrated (Cornelis Vrolijk, NL)

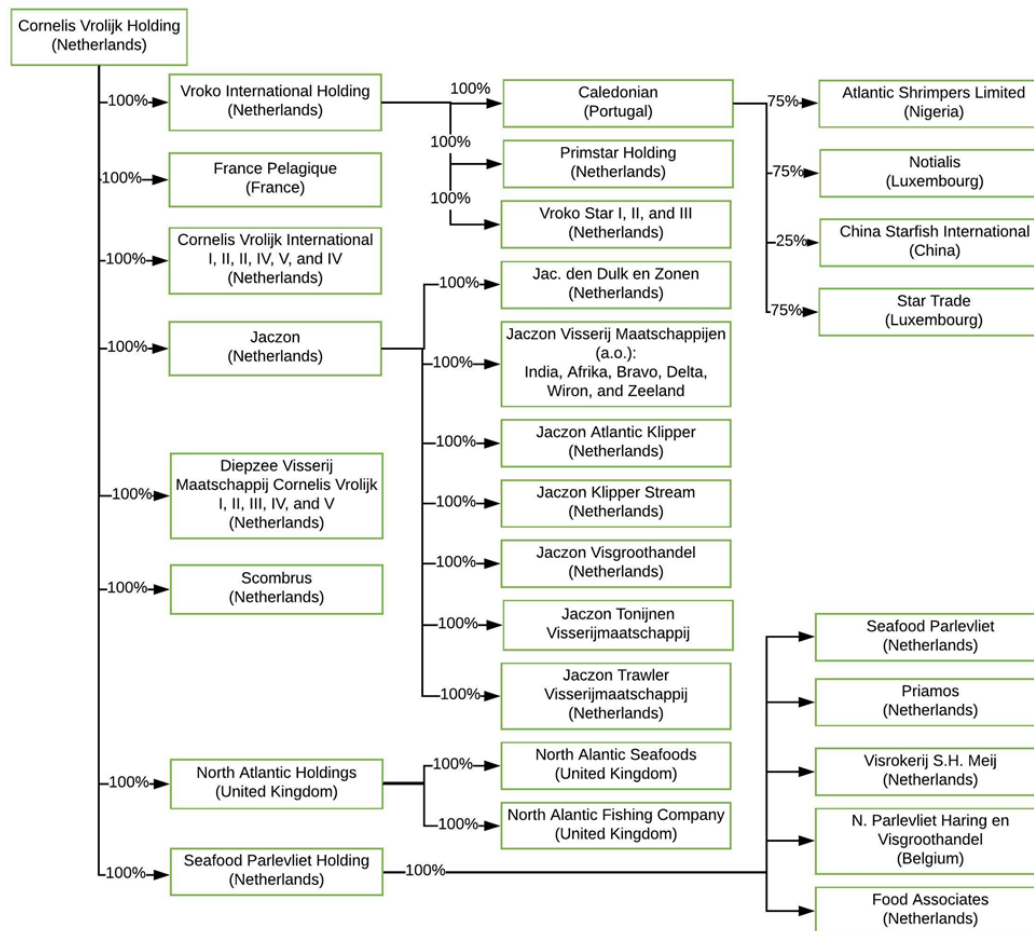


Figure 85
p. 195

3. Country findings: Example 2

High level international integration (PP Groep, NL)

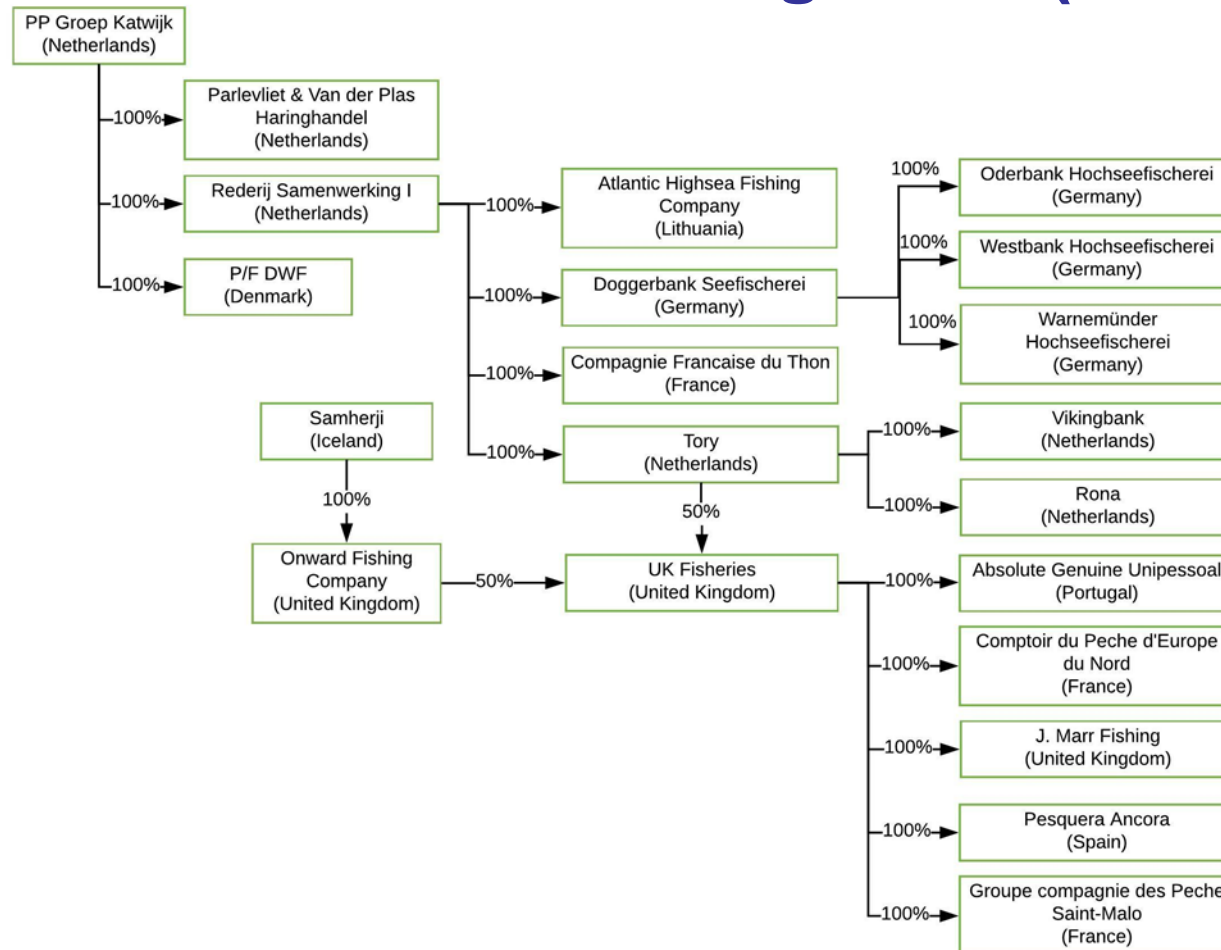


Figure 84
p. 193

3. Country findings: Example 3

Integration outside EU (Portobello Capital, ES)

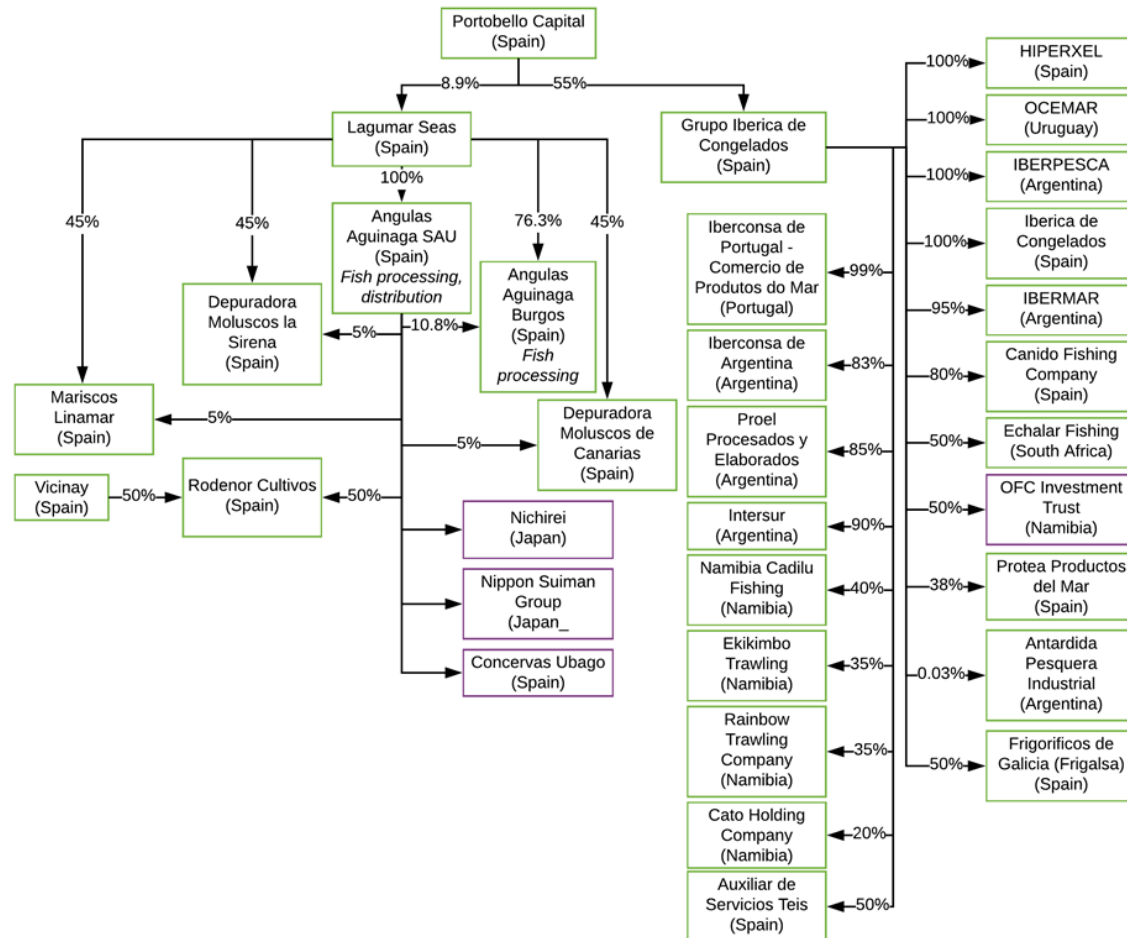


Figure 111
p. 246

3. Country findings: Example 4

Broad raw material base (Gallagher Bros, IE & Ta Psarokaika, CY)

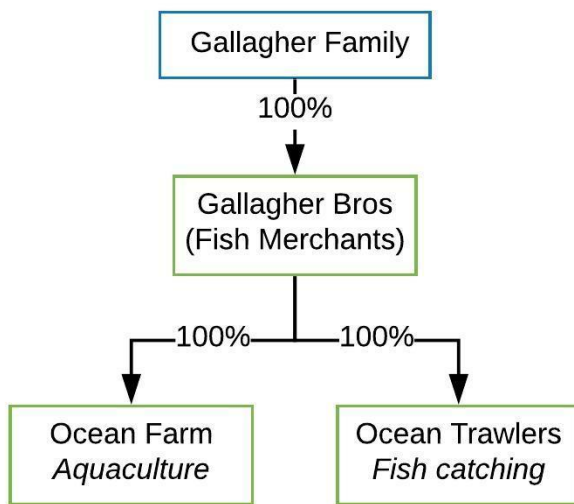


Figure 60, p. 147

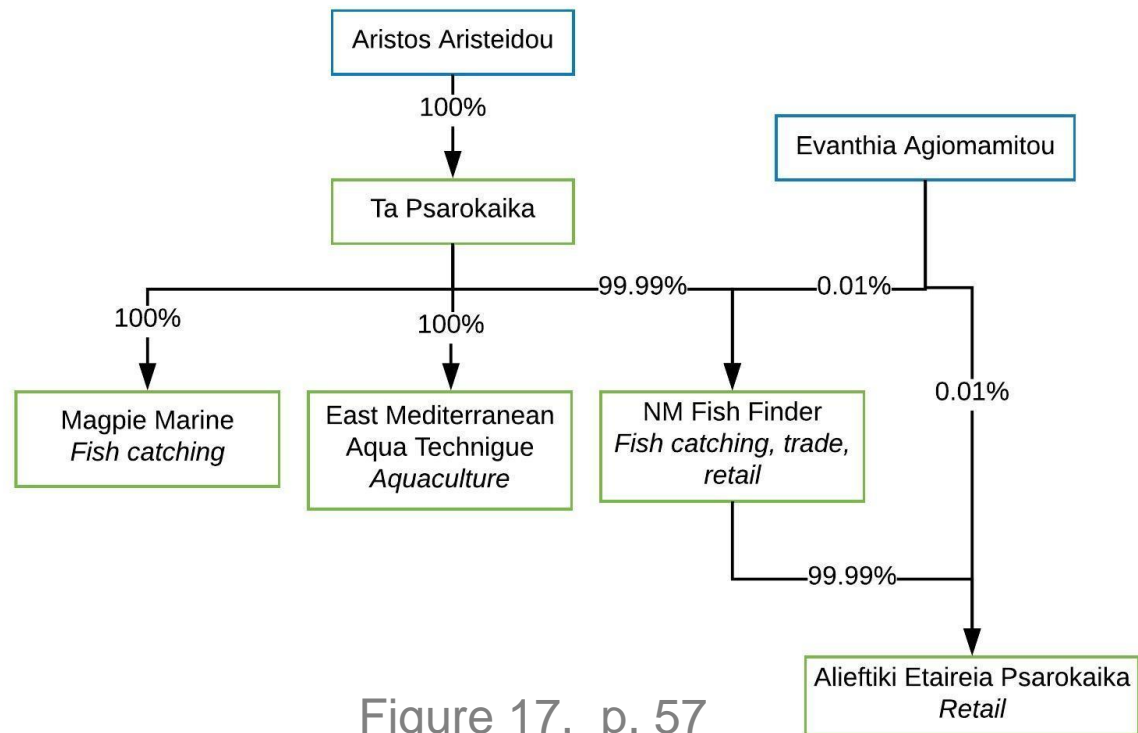


Figure 17, p. 57

3. Country findings: Example 5

Sea-to-supermarket (Intermarché, FR)

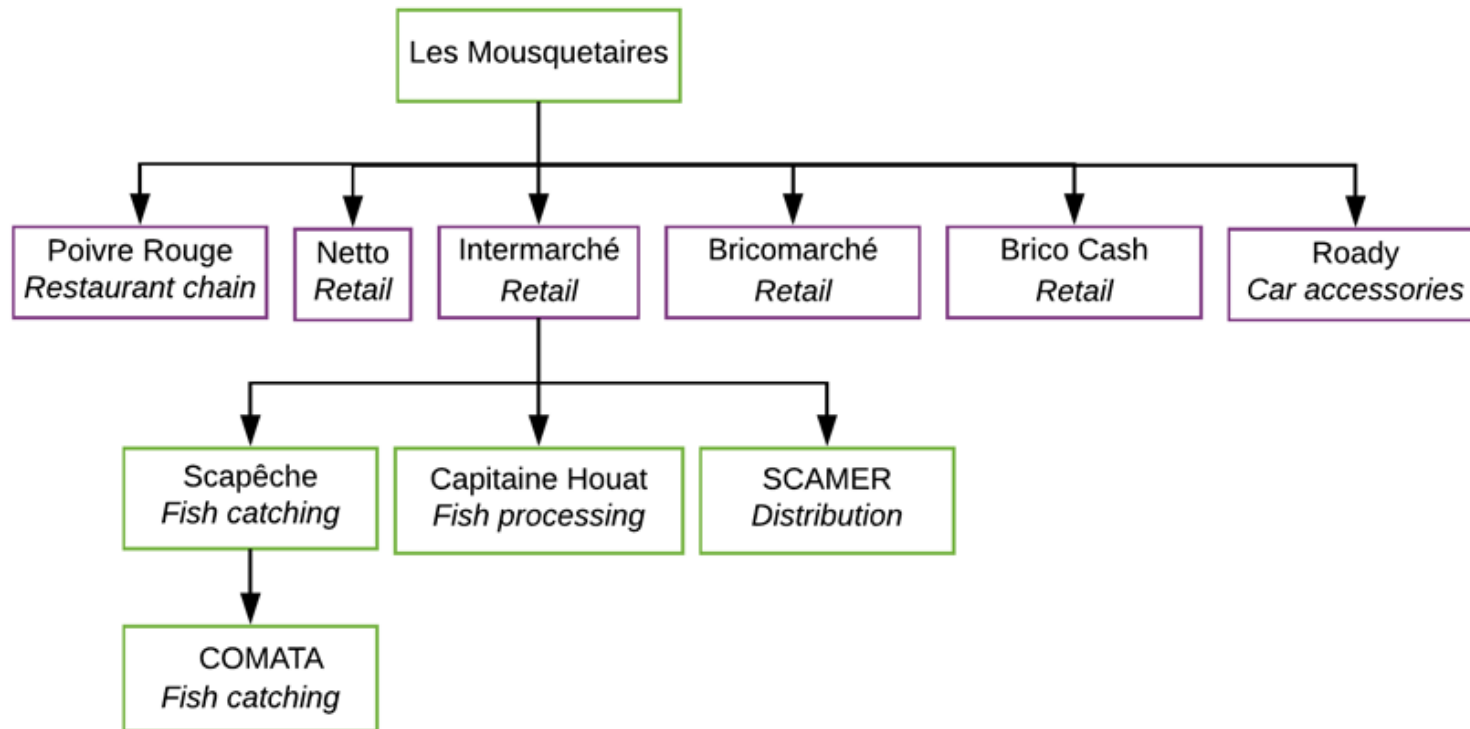


Figure 45
p. 111

3. Country findings: Example 6

Quota management system driven international integration (Omega Fishing, FI & Astrid Fiske, SE)

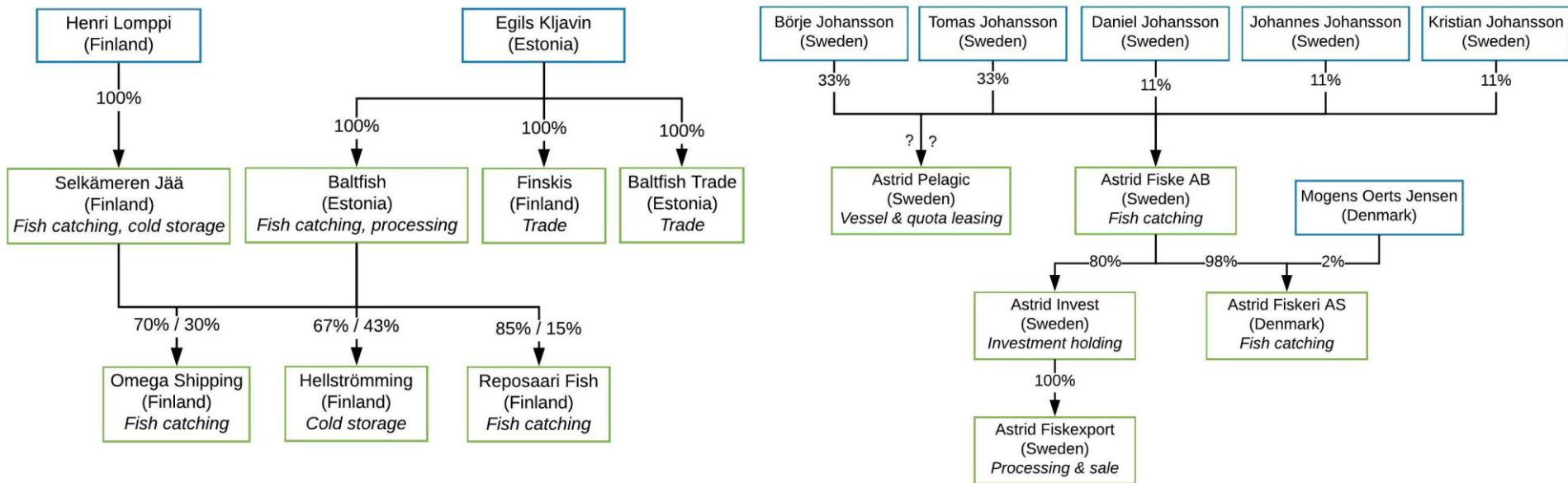


Figure 40
p. 101

Figures 22 & 116
p. 70 & 256

4. Conclusions – 1

General trends:

- Significant variation between Member States
- Broad range of different factors - many inter-linked – drive these variations

Three main categories:

- Regulatory environment
- Natural resources
- Firm performance



4. Conclusions – 2

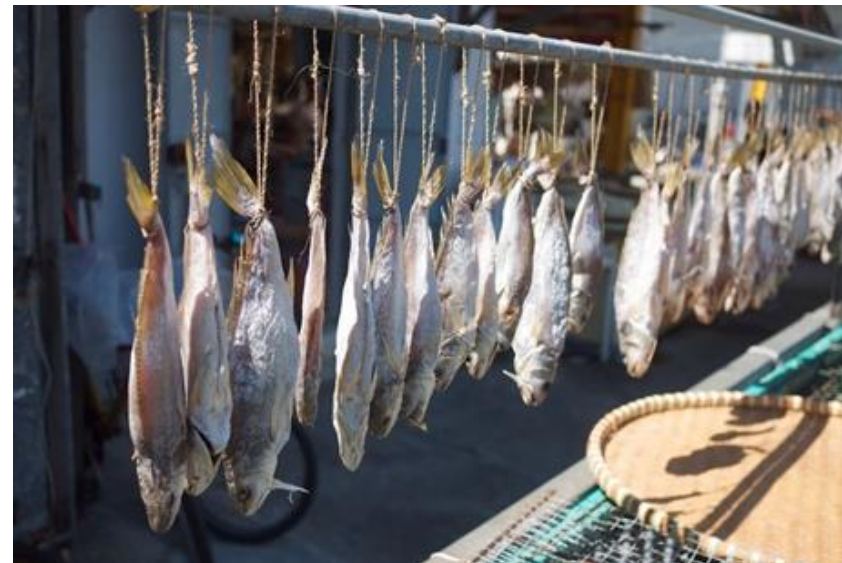
Regulatory environment:

- Ease of access
- Regulatory clarity / stability
- Fisheries management system

Natural resources:

- Fishing segment
- Access to sufficient fish stocks
- Historical factors

Firm performance



5. Recommendations

Deeper econometric analysis

**National level comprehensive & coherent
legislative frameworks for fisheries**

**Incentivize aquaculture in resource scarce
jurisdictions**

**Foster development of
markets for non-TAC
and by-catch species**



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