

FACTS ABOUT THE

# NORWEGIAN FISHERIES INDUSTRY

# 2003



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# facts about the Norwegian Fisheries Industry

"The riches of the sea - Norway's future!". We strongly support this vision. Norway is a coastal state with both a right and an obligation to manage one of the most productive sea areas in the world. At the same time these waters offer excellent opportunities for an environmentally sound aquaculture industry. The fisheries and aquaculture industries are among Norway's major export industries and constitute the very foundation of economic activities along the Norwegian coast.

Not only coastal regions benefit from the rich marine resources. It goes without saying that an industry, which in 2002 generated export revenues of NOK 28.7 billion and a significant domestic turnover, is of paramount importance to the entire population.

Our objective is that the marine sector should take over more of Norway's potential value creation. Such a development will require vibrant and dynamic coastal communities with a well-planned infra-

structure and enterprising and creative businesses. The industry must be viable and provide young people with attractive and competitive jobs.

This is the 17<sup>th</sup> edition of Facts about the Norwegian Fisheries Industry. Here you will find statistics and brief comments providing a profile of the Norwegian fisheries industry. We have also outlined some of the key factors in its development.

The brochure is published by Norges Fiskarlag (The Norwegian Fishermen's Association), Norwegian Seafood Federation (FHL) and the Norwegian Ministry of Fisheries. In addition, various sectors of the industry have contributed with updated information.

It is our hope that this edition, like the previous ones, will provide valuable information to those who would like to extend their knowledge of one of Norway's major industries.

Oslo/Trondheim, Sept. 2003

MINISTRY OF FISHERIES



*Svein Ludvigsen*

Svein Ludvigsen  
Cabinet minister

NORWEGIAN FISHERMEN'S  
ASSOCIATION



*Reidar Nilsen*

Reidar Nilsen  
Chairman

NORWEGIAN SEAFOOD FEDERATION  
(FHL)

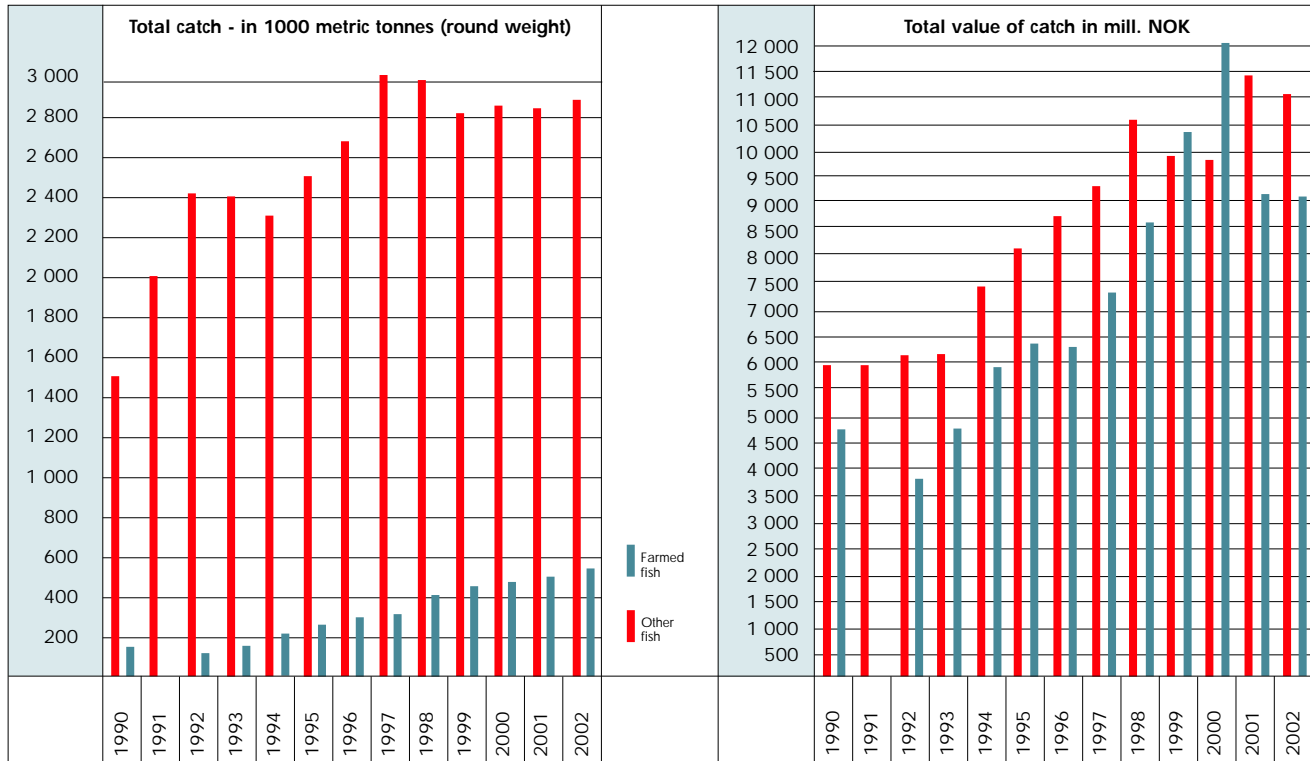


*Lisbeth Berg-Hansen*

Lisbeth Berg-Hansen  
Chairman of the board



## Volume and primary value of Norwegian fisheries and fish farming 1990 – 2002



2002: Provisional figures  
 Farmed fish figures for 1991 not published  
 Source: Directorate of Fisheries



# *t*he fishermen



From 1960 to 1975, the total number of fishermen in Norway declined from about 61,000 to about 35,000. In 1995 the figure was almost 24,000. In the meantime more selective registration criteria had been introduced in the official Fishermen's Register.

18,648 fishermen were registered in 2002. 13,913 of them had fishing as their sole or main occupation, while fishing was a secondary occupation for the remaining 4,735. Consequently, 75 per cent of all registered fishermen had fishing as their sole or main occupation.

Over the last 50 years the number of fishermen has dropped substantially. This is, of course, a result of increased efficiency in terms of fishing methods and equipment on vessels. The decrease in the number of fishermen working on Norwegian fishing vessels has slowed down somewhat in recent years.





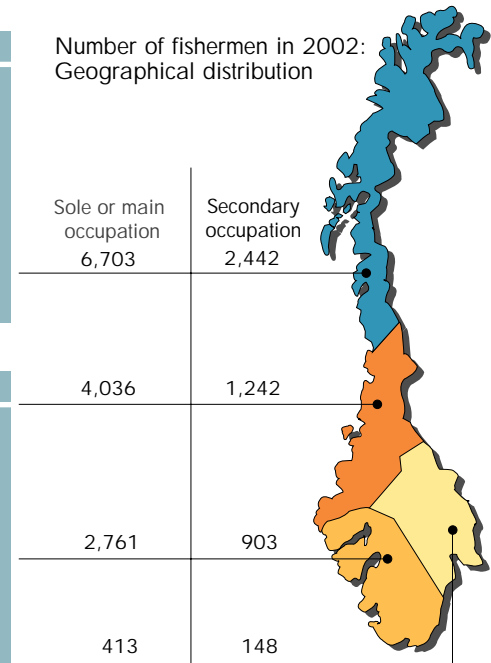
### Number of fishermen

Year	Sole or main occupation	%	Secondary occupation	%	Total
1948	68,400	80.0 %	17,100	20.0 %	85,500
1960	45,200	74.2 %	15,700	25.8 %	60,900
1971	30,819	74.5 %	10,562	25.5 %	41,381
1975	25,388	72.0 %	9,874	28.0 %	35,262
1980	25,140	72.3 %	9,649	27.7 %	34,789
1995	17,160	72.5 %	6,493	27.5 %	23,653
2000	14,259	71.0 %	5,835	29.0 %	20,094
2002	13,913	74.6 %	4,735	25.4 %	18,648

### Number of sole or main occupation fishermen distribution by age

Year	15-19 year	20-29 year	30-39 year	40-49 year	50-59 year	60 and older	Total
1995	544	4,386	3,735	3,648	3,067	1,780	17,160
1996	465	4,251	3,765	3,627	3,170	1,809	17,087
1997	436	3,896	3,727	3,503	3,242	1,857	16,661
1998	425	3,105	3,395	3,189	3,223	1,804	15,141
1999	458	3,010	3,447	3,180	3,330	1,901	15,326
2000	445	2,587	3,245	3,032	3,273	1,677	14,259
2001	425	2,287	3,165	2,931	3,165	1,727	13,700
2002	385	2,442	3,335	3,007	3,117	1,627	13,913

### Number of fishermen in 2002: Geographical distribution





# t he fishing fleet



By the end of 2002, 10,649 fishing vessels were registered, of which 8,165 were covered vessels and 2,847 open boats. Only a part of the large number of registered vessels is used for all-year fishing. 5,870 of the 10,649 vessels had catch incomes exceeding NOK 25,000. 5,277 of these were covered vessels and 593 open boats.

In 2002 the fishing fleet in all-year operation numbered 2,206 vessels, i.e. vessels operating for at least 30 weeks. The table below shows the distribution of vessels used for all-year fishing in 2002.

	8 - 12,9 m	13 - 20,9 m	21 - 30,9 m	31 - 40,9 m	41 m and over	Total
Number	1 127	598	207	86	188	2206
Average age	21	28	22	23	17	22
<b>By county:</b>						
Finnmark	210	88	21	3	19	341
Troms	184	94	27	6	19	330
Nordland	390	233	66	3	28	720
Trøndelag	75	29	7	3	4	118
Møre og Romsdal	109	42	27	37	65	280
Sogn og Fjordane	29	19	24	11	8	91
Hordaland	31	9	9	9	39	97
Rogaland	32	26	10	9	6	83
Agder/Østlandet	67	58	16	5	0	146



## Fishing fleet licences

By the end of 2002, 727 licences for fishing, sealing and whaling were granted to 388 vessels. These licences were: 83 cod trawling, 94 purse seine, 47 blue whiting trawling, 99 deep sea prawn trawling, 116 North Sea/industrial trawling, 11 saithe trawling, 130 capelin trawling and 36 other types of licences. There has been a considerable reduction in the number of vessels and licences since 1980. It is, however, only the ocean going fishing vessels which have their fishing regulated by licences. The majority of the fleet, the coastal vessels, are regulated by annual fishing permits.

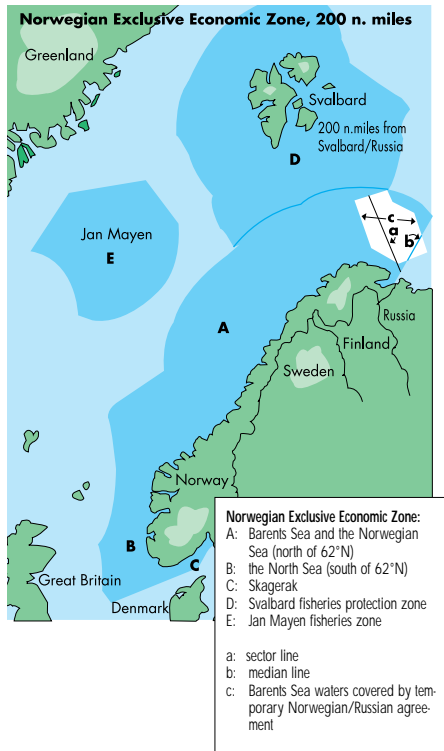


**DISTRIBUTION OF LICENCES BY COUNTY 1980-2002**

County	1980		1990		1995		2000		2002	
	Vessels	Licences	Vessels	Licences	Vessels	Licences	Vessels	Licences	Vessels	Licences
Finnmark	87	123	62	107	54	85	44	75	38	62
Troms	113	175	76	131	72	118	57	99	51	81
Nordland	120	156	74	114	71	112	61	99	61	95
Nord-Trøndelag	13	16	5	10	5	12	5	14	4	10
Sør-Trøndelag	33	52	9	20	7	15	5	14	5	11
Møre og Romsdal	210	279	120	207	100	153	98	161	90	171
Sogn og Fjordane	75	87	13	16	9	11	7	9	5	5
Hordaland	139	183	54	95	55	103	57	120	52	126
Rogaland	127	154	70	82	57	81	53	116	36	88
Agder/Østlandet	79	90	64	66	68	77	52	76	46	78
Total	996	1315	547	848	498	767	439	783	388	727



# *n*orwegian fishery yields 2000, 2001\*, 2002\*



Catch area	QUANTITY CAUGHT ROUND FISH WEIGHT				Percentage distribution 2000 - 2002
	2000 1000 t.	2001 1000 t.	2002 1000 t.	Average 2000-2002	Quantity %
Norwegian mainland zone and outside the 200 n. miles zone	2.003.8	1.912.3	1.958.4	1.958.2	72.3
Svalbard fisheries protection zone	31.3	60.5	47.8	46.5	1.7
Jan Mayen fisheries zone	46.2	57.0	72.0	58.4	2.2
EU zone	486.7	333.0	427.8	415.8	15.3
Greenlandic zone	9.4	9.9	8.9	9.4	0.4
Icelandic zone	51.5	52.1	55.4	53.0	1.9
Russian zone	15.8	102.1	138.4	85.4	3.2
Faroese zone	47.5	68.9	14.3	43.6	1.6
Canadian zone	2.6	12.6	12.8	9.3	0.3
ICES - area XII	2.9	78.2	7.2	29.4	1.1
<b>Total</b>	<b>2.697.7</b>	<b>2.686.6</b>	<b>2.743.0</b>	<b>2.709.0</b>	<b>100.00</b>

Including Norwegian catches on Russian quota, also catches for research purposes  
 \*Provisional figures for 2001 and 2002





## Landed catches from Norwegian fisheries, volume and primary value 1998 - 2002

SPECIES	VOLUME (in tonnes)					PRIMARY VALUE ( NOK 1000)				
	1998	1999	2000	2001	2002	1998	1999	2000	2001	2002
Herring	831 844	829 008	799 946	581 161	569 800	1 462 364	1 202 500	1 435 433	2 243 454	2 027 800
Sprat	35 166	22 214	6 425	12 465	2 600	57 245	32 300	20 725	23 583	11 900
Mackerel	158 340	161 046	174 225	180 603	184 200	840 788	865 529	985 414	1 336 185	1 361 200
Capelin	88 226	91 813	373 986	482 834	531 600	77 377	190 881	368 473	535 185	649 700
Blue whiting	570 665	534 570	553 478	573 686	558 100	489 429	288 870	323 803	400 869	551 500
Norway pout, sandeel,	371 200	238 713	171 927	214 582	202 000	332 291	131 261	104 283	165 623	185 600
Horse mackerel	13 366	46 657	2 084	7 988	36 700	27 551	106 723	4 859	45 410	97 600
Cod	321 428	256 555	219 192	208 767	227 600	3 366 922	3 324 833	2 930 358	2 903 495	2 863 100
Saithe	194 452	198 387	169 729	169 490	202 300	1 051 721	1 012 460	739 300	82 226	931 300
Haddock	79 008	53 243	45 935	51 642	54 900	720 641	591 078	533 668	616 593	553 700
Tusk	21 032	23 274	21 915	18 777	18 100	186 211	191 344	178 308	178 351	154 200
Ling, blue ling	23 138	19 761	17 733	14 583	16 100	272 843	228 231	224 469	234 039	209 500
Redfish	28 571	30 856	26 274	28 656	16 300	196 632	201 066	175 830	201 691	109 600
Greenland halibut	11 948	19 704	13 019	15 152	11 500	187 802	284 852	236 579	260 652	172 900
Prawn	57 142	63 538	66 520	65 314	66 600	819 492	902 867	1 028 998	824 959	791 700
Shellfish	156	445	597	691	700	3 043	8 484	11 101	13 138	12 900
Kelp and sea tangle	179 762	178 542	192 426	175 210	182 600	28 888	28 423	35 800	32 517	33 400
Other species	55 010	40 205	38 000	58 514	28 500	429 725	384 243	429 082	577 178	290 900
<b>Total</b>	<b>3 040 454</b>	<b>2 808 531</b>	<b>2 893 411</b>	<b>2 860 115</b>	<b>2 910 200</b>	<b>10 550 965</b>	<b>9 975 951</b>	<b>9 766 483</b>	<b>11 415 148</b>	<b>11 008 500</b>

2000, 2001 and 2002: Provisional figures

Source: Directorate of Fisheries



# *f*ish farming



Over the last decades fish farming has become very important for the employment and pattern of settlement along the Norwegian coast. Today, some 4,600 persons are involved in work on fish and shellfish farms. Indirectly, many more depend on the aquaculture industry. A total of 20,000 people are employed in fish farming and other industries supplying the aquaculture industry with services and products such as fish feed, equipment, transport and packaging.

The aquaculture industry will have a growing impact on coastal communities and the Norwegian economy as the marine sector will provide an increasingly larger proportion of Norway's total value creation.

2002 saw a production of 450,000 tonnes of salmon and 83,000 tonnes of rainbow trout. For the time being, only small quantities of other species are produced, such as cod, char, halibut, blue mussel, oyster and scallop. The value of farmed salmon and trout was a good NOK 11 billion, representing 38% of the total value of Norwegian fish exports.



## Employees in fish and shellfish farming

Country	Number of people	
	Men	Women
Finnmark		
Troms	495	57
Nordland	631	88
Nord-Trøndelag	267	29
Sør-Trøndelag	471	101
Møre og Romsdal	548	81
Sogn og Fjordane	365	53
Hordaland	730	132
Rogaland	301	48
Agder/Østlandet	89	10
2001	3 897	599
2000	3 719	603
1999	3 770	576
1998	3 526	542
1997	3 590	607

Source: Directorate of Fisheries.

## Farmed salmon and rainbow trout, harvest by county. (1000 tonnes, round weight)

Country	Salmon		Rainbow Trout	
	2001	2002	2001	2002
Finnmark	32 893	38 352	282	574
Troms	25 785	47 111	466	2 390
Nordland	75 330	85 612	6 894	8 276
Nord-Trøndelag	33 554	48 194	519	952
Sør-Trøndelag	44 419	47 130	6 829	9 762
Møre og Romsdal	54 364	45 942	17 515	20 711
Sogn og Fjordane	38 781	35 606	13 062	16 163
Hordaland	82 435	70 724	16 036	23 566
Rogaland	32 439	31 333	3 397	782
Total	420 000	450 006	65 000	83 175

Source: Directorate of Fisheries, Norwegian Seafood Federation (FHL)





# Landing installations and processing industry

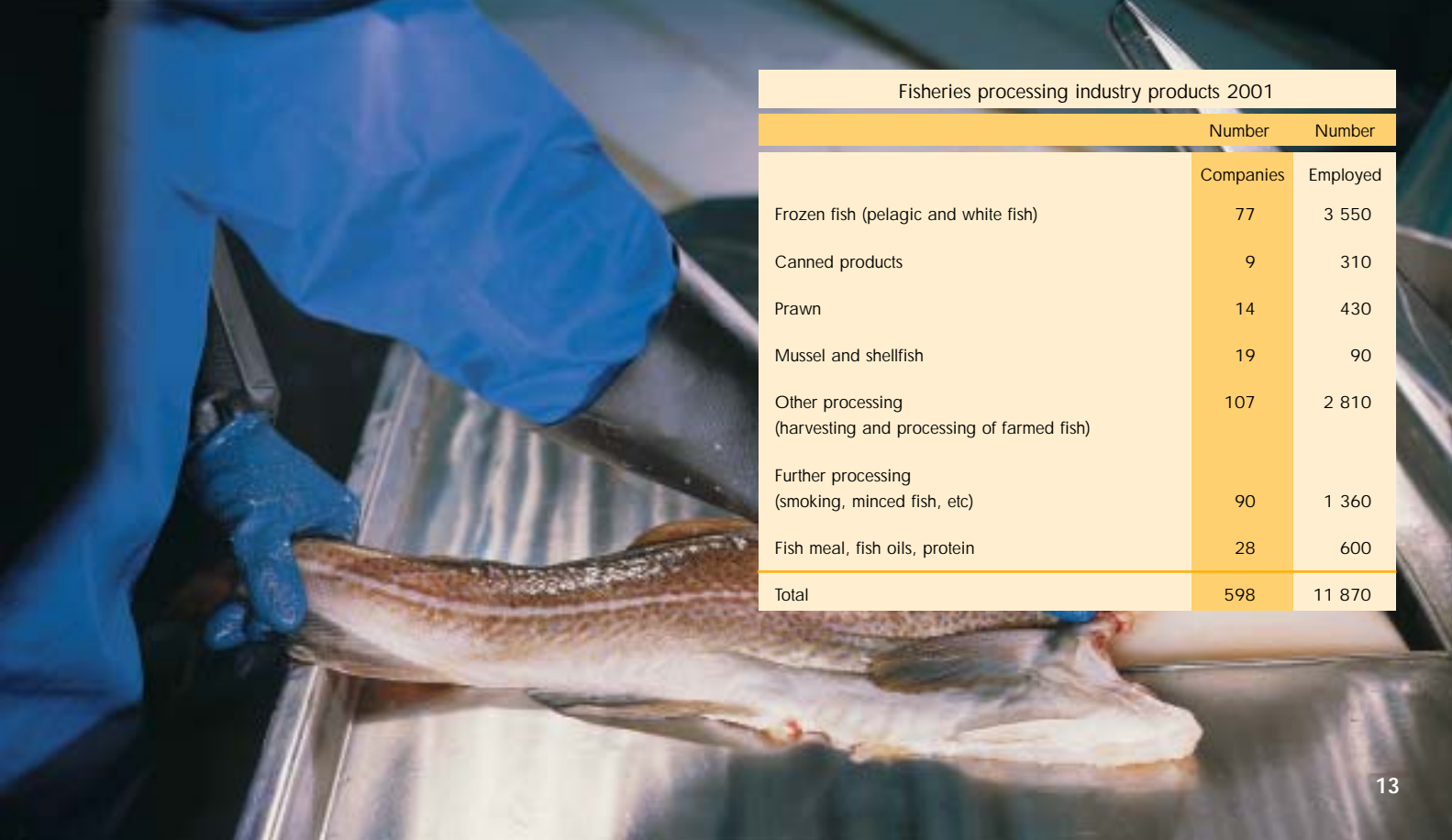


The Norwegian fish processing industry consists of a large number of small and medium-sized businesses scattered along the entire coastline. In 2001, some 600 processing companies employed approximately 12,000 people.

Many companies have invested substantial in modern facilities and equipment, quality assurance, skills development and marketing initiatives. Investments demand a high degree of capacity utilization and presuppose stable supplies of raw materials. Steady supplies of raw materials are hard to achieve because catches vary with the seasonal availability of the different fish stocks.

The high level of costs in Norway, a negative trend in the exchange rate and deteriorating access to the EU market have provided the Norwegian processing industry with major challenges in recent years. As a result, the structure in the different sectors of the industry is changing. In the white-fish sector and in the industry based on pelagic raw material (herring, capelin, mackerel), we see a trend towards stronger concentration of ownership interests. Many companies also tend to relocate in low-cost countries and the EU. The challenge is to exploit the unique competitive advantage that Norway has: access to fresh raw material of superior quality.





Fisheries processing industry products 2001

	Number	Number
	Companies	Employed
Frozen fish (pelagic and white fish)	77	3 550
Canned products	9	310
Prawn	14	430
Mussel and shellfish	19	90
Other processing (harvesting and processing of farmed fish)	107	2 810
Further processing (smoking, minced fish, etc)	90	1 360
Fish meal, fish oils, protein	28	600
Total	598	11 870

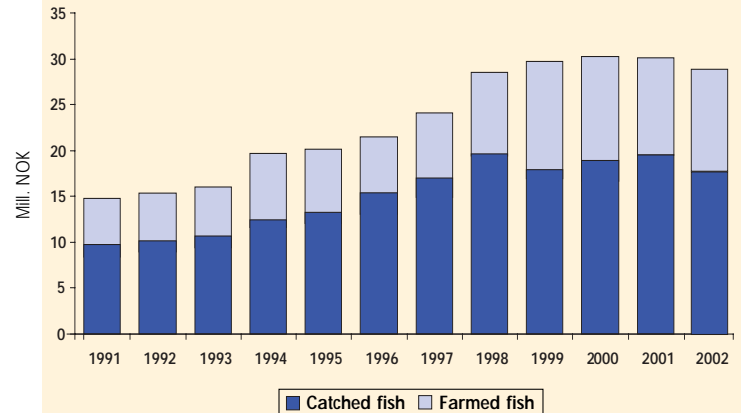


# Sales value of fish and fish products



Approximately 90 per cent of the total quantity of landed and farmed fish is exported. 10 per cent is sold in the domestic market. The total export value of fish and fish products amounted to NOK 28.7 billion in 2002.

Export value of Norwegian fish and fish products 1991 - 2002





## Value of Norwegian exports of fish and fish products 2002 (NOK million)

Products	Export 2002	EU- countries total	Of which					Other countries total	Of which	
			Denmark	France	UK	Portugal	Sweden		Japan	Russia
Fresh fillets excluding salmon and herring	186	180	30	12	42	0	21	6	1	0
Fresh fish excl. salmon and herring	1,233	1,128	507	170	105	2	59	105	19	34
Frozen fish excluding salmon and herring	5,659	735	82	11	262	201	30	4,925	2,387	393
Frozen fillets excluding salmon and herring	1,845	1,386	80	226	669	0	151	459	37	3
Klipfish	2,535	1,281	2	62	11	995	0	1,254	0	0
Canned fish, excluding salmon and herring	246	215	10	7	1	0	171	31	0	2
Fish meal	669	621	238	36	192	0	8	48	2	0
Farmed salmon, processed	2,166	1,209	72	310	37	0	170	957	377	15
Farmed salmon and trout, fresh and frozen	7,366	4,995	1,348	1,208	274	37	313	2,371	672	400
Prawn	964	821	124	22	269	0	301	144	27	2
Salted fish, excluding herring	1,086	1,019	10	16	3	493	9	67	0	0
Herring and sprat, canned	224	102	22	0	0	0	74	113	8	0
Herring and sprat, processed	104	98	15	3	2	0	51	6	0	0
Herring and sprat, fresh and frozen	2,566	547	185	45	34	0	10	2,018	51	901
Herring and fish oil	206	125	10	10	46	0	4	81	0	0
Shellfish and molluscs, excl. prawn	195	102	12	25	6	0	20	92	33	3
Stockfish	633	486	3	5	16	1	45	148	0	1
Other products	789	400	196	7	48	2	68	397	73	38
<b>Total export</b>	<b>28,672</b>	<b>15,450</b>	<b>2,946</b>	<b>2,174</b>	<b>2,014</b>	<b>1,731</b>	<b>1,505</b>	<b>13,222</b>	<b>3,688</b>	<b>1,793</b>

Source : Norwegian Seafood Export Council



# t he fisheries industry in a national perspective

The Norwegian fisheries industry has in recent years seen a favourable development. Subsidies have been removed from the industry, the profitability in parts of the fleet has been improved and the fisheries industry emerges as an industry with a considerable potential for increased value creation. The industry's main challenge now is how to meet the growing competition from low-cost countries.

Fishing and fish farming are of vital importance in many coastal districts, where a large number of people earn their living directly from these industries. A considerable number of self-employed persons and wage earners are dependent on the fish resources through processing and sales of fish and fish products, equipment and gear industry, shipbuilding and repair yards, transport and packaging.

Norway exported seafood to the tune of NOK 28.7 billion in 2002. This represents 5.7 per cent of the country's total exports value, thus making the fisheries industry Norway's second largest export industry, after oil and gas.

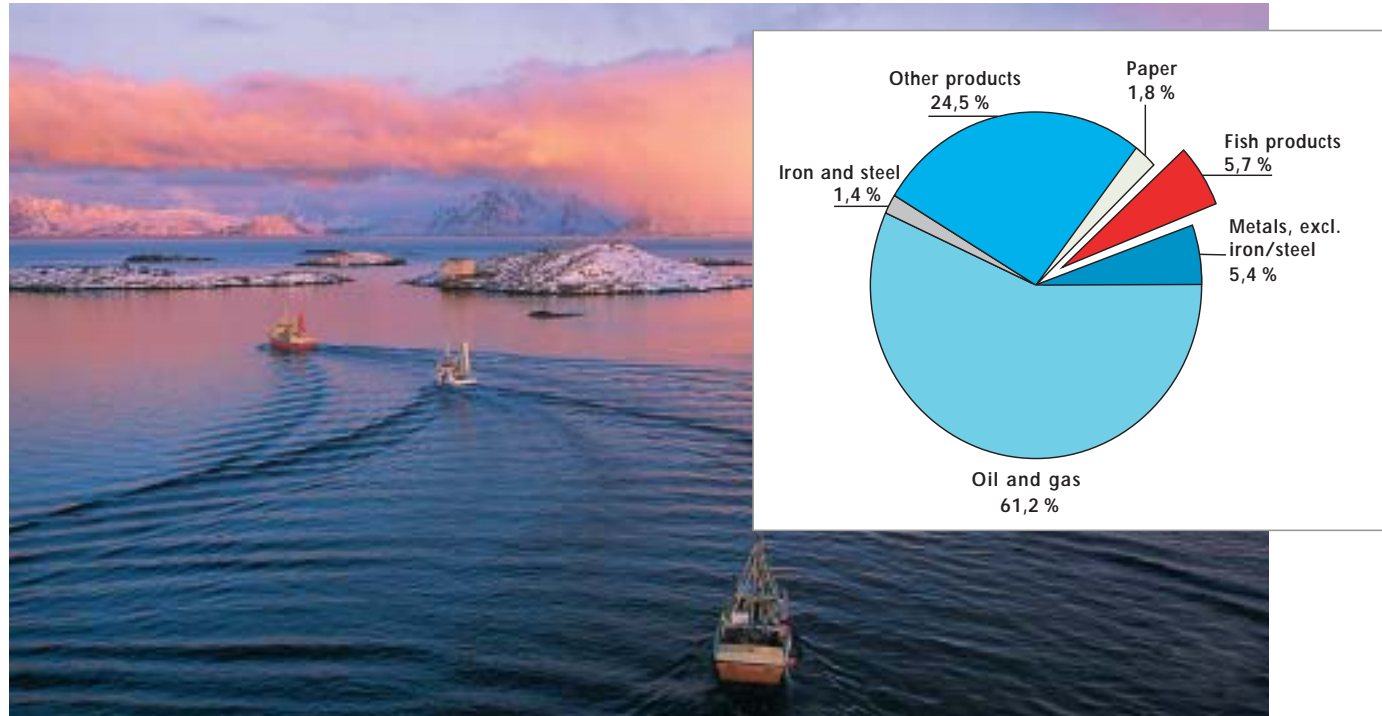
The Norwegian fisheries industry is strongly dependent on its international environment. Firstly, we share most of our fish stocks with other countries. This requires close co-operation in the management of fisheries resources. Secondly, most of the fish landed in Norway is exported. The Norwegian fishing industry is thus strongly affected by developments in different markets and changes in international trade policies.







## Fish and fish products' share of Norway's total exports 2002



Source: Norwegian Seafood Export Council, Central Bureau of Statistics



# t he Norwegian fisheries industry in an international perspective



From 1950 to 1970 the total global catch of fish increased by about 7 per cent annually. In 1970, the catch totalled about 60 million tonnes. From 1975 to 1990, catches increased sharply. The peak year was 1989, with a total of 100 million tonnes, including freshwater fish. Since 1989, the global catch has stabilized at this level.

The major fisheries nations in 2002 were China\*, with a total catch of 17 million tonnes, and Peru, with a total catch of 8 million tonnes. Norway is the 10th largest producer, with a total catch of 3 million tonnes. In fish farming, China\* is in the lead with a production of 34 million tonnes, and India is in second place boasting a production of 2 million tonnes. By comparison, Norway is in the tenth place with a production of 0.5 million tonnes. In 2002 Norway exported a good 2 million tonnes of seafood representing a value of NOK 27,7 billion, and was amongst the 3 largest fish-exporting countries world wide.

Norway is exporting seafood to approximately 160 countries. The EU is our largest market, and the export value is close to NOK 15 billion. Other major markets for Norwegian seafood are Japan, Denmark and France. In 2002 these markets received fish worth NOK 3.6 billion, NOK 2.9 billion and NOK 2.1 billion, respectively.

Aquaculture is steadily becoming more important to the Norwegian economy as new markets are being established around the world. In 2002, the export of Norwegian salmon and trout amounted to almost NOK 11 billion. When it comes to catch fisheries, the most important species are cod (NOK 5 billion), herring (NOK 3 billion) and mackerel (NOK 3 billion).

\* unconfirmed statistics



# Major fisheries nations, wild fish and farmed fish, 2002

Million tonnes

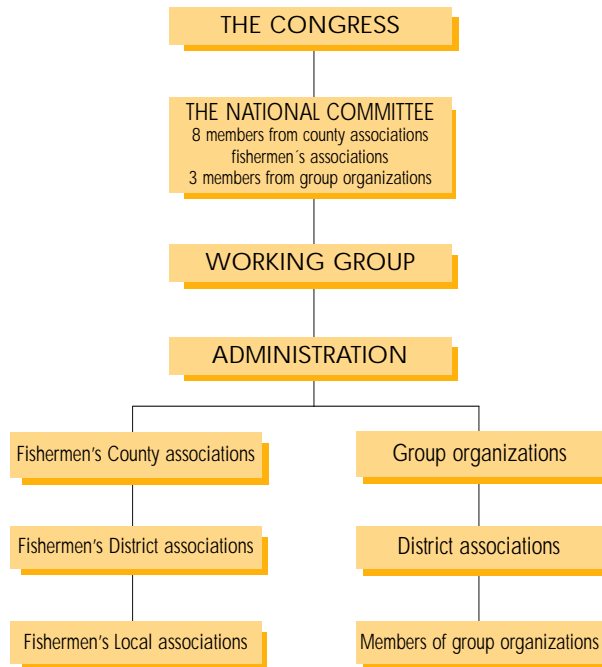


Source: FAO

\* Unconfirmed statistics



# the organization of fishing fleet



## Norwegian Fishermen's Association (NFL)

is a politically independent national organization based on voluntary membership of fishermen via their county associations and group organizations.

The members own vessels and/or gear, and they work on a share or percentage basis. It includes fishermen working on vessels of all sizes.

The highest governing body of NFL is the Congress, which consists of some 70 delegates elected by the county associations and group organizations. Ordinarily, the Congress meets every second year. In the intermediate periods, authority is exercised by the National Committee, consisting of 11 members elected by the Congress.

Organizational activities embrace economic, social and cultural issues. NFL works in close cooperation with national authorities. For instance, the Basic Agreement for the Fishing Industry, effective since 3 June 1964, provides that the Association is responsible on behalf of the fisheries industry as a whole when negotiating with the authorities on matters that concern economic conditions in the industry.

Due to the great importance of the fisheries industry in the coastal districts, NFL has an important responsibility regarding the development of the communities in these areas.





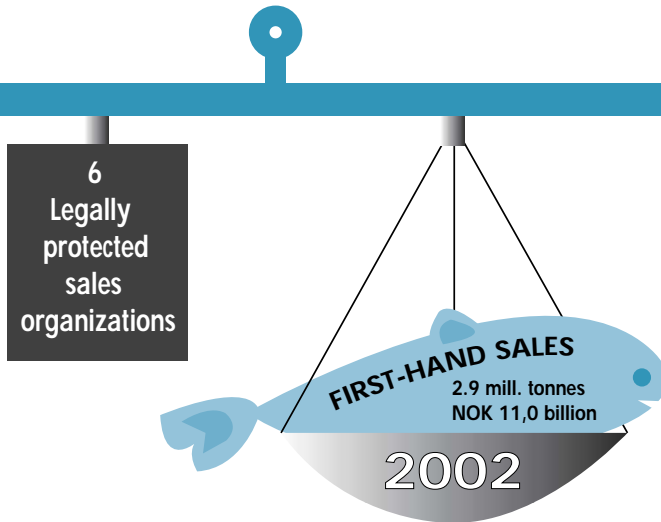
## The fishermen's legally protected sales organizations

According to the Raw Fish Act of 14 December 1951, all first-hand sales of fish and shellfish, except for farmed fish, are to be carried out through the fishermen's sales organizations. Currently there are 6 such organizations, which have legally protected rights to first-hand sales either with respect to a geographical district or with respect to certain species of fish.

When the fish farmers' sales organization ceased to exist in 1991, farmed fish was excluded from the provisions of the Raw Fish Act.

The sales organizations are based partly on indirect membership through the fishermen's associations, partly on direct membership of individual fishermen or crews, and partly on a combination of these forms of membership. The aims of the sales organizations are, through organised sales, to ensure high and stable prices and reliable terms of payment. The individual sales organizations have arranged their activities in different ways to achieve this. Minimum first-hand prices are usually determined by negotiations between the sales organisations and the buyer's organizations. If agreement cannot be reached, the Raw Fish Act gives sales organizations the authority to set the minimum prices.

There is a levy on all first-hand sales to cover the administrative costs of the sales organizations.





# t he organization of processing and marketing

Norwegian Seafood Federation (FHL) is a nation-wide employer's organization encompassing around 600 member enterprises with more than 10,000 employees. FHL consists of the following branches:

- FHL industry and exports
- FHL aquaculture
- FHL fish meal
- FHL fish feed

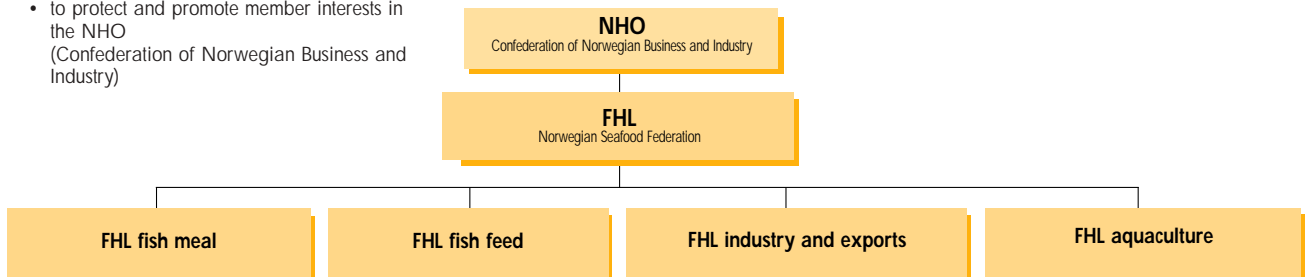
FHL's objectives are:

- to protect and to promote the common interests of its members vis-à-vis authorities, national and international institutions, organizations and society in general
- to provide members with optimal framework conditions and a development potential which enhance their competitive strength and viability, and create attractive and safe jobs
- to ensure efficient promotion of the industry
- to enhance skills development in the industry
- to develop favourable and productive relations between member enterprises, employees and their organizations
- to protect and promote member interests in the NHO (Confederation of Norwegian Business and Industry)

FHL is attached to the NHO (Confederation of Norwegian Business and Industry). FHL attends to member interests in the following areas:

- Business policy
- Trade policy
- Environment and food safety
- R&D
- Health, work environment, safety
- Collective agreement questions, wage and working conditions

The FHL branches attend to member interests in the various business sectors. FHL operates within the entire value chain in the Norwegian fishing and aquaculture sectors in order to present the industry as dynamic and effective to authorities, central and local government administration and to the public in general.







# Central government administration

The Royal Norwegian Ministry of Fisheries was established in 1946. The Ministry of Fisheries is the secretariat of the Minister of Fisheries and manages the fisheries sector by laws and regulations.

"The riches of the sea - Norway's future" is the vision of the Ministry of Fisheries. The objectives are to ensure stable framework conditions for sustainable and profitable fishing and aquaculture industries, as well as other business activities based on marine organisms. Thus, these industries may in the next decades realize a potential value creation many times the present. Furthermore, the Ministry of Fisheries aims to enhance sea transport competitiveness, secure sea traffic and maintain an adequate pollution contingency plan.

## The Ministry of Fisheries is organized in four departments:

- Department of Marine Resources and Environment
- Department of Aquaculture and Markets
- Department of Coastal Administration
- Department of Administration and Research

## The Ministry of Fisheries is responsible for:

- The fishing industry
- The aquaculture industry
- Ports, lighthouses, pilot services, electronic navigation devices and emergency preparedness systems in case of pollution.

Fish stocks migrate across economic zones and international waters, and for this reason international co-operation is necessary to ensure sustainable management of the fish stocks. Norway has fishing agreements with the EU, Russia, Faeroe Islands, Iceland and Greenland.

Annual negotiations are conducted to establish quotas for the different stocks and decide how the fisheries are to be managed. The Norwegian delegations include representatives of the authorities, marine scientists and the fisheries industry. Quotas are based on the assessments and recommendations of the International Council for the Exploration of the Sea (ICES). Norway also participates in regional fisheries organizations, such as the Northeast Atlantic Fisheries Commission (NEAFC), the Northwest Atlantic Fisheries Organization (NAFO), the North Atlantic Marine Mammal Commission (NAMMCO) and in global organizations as the FAO and the International Whaling Commission (IWC).

Various auxiliary institutions, which are both executive and administrative, give technical/professional advice within their fields to the Ministry:

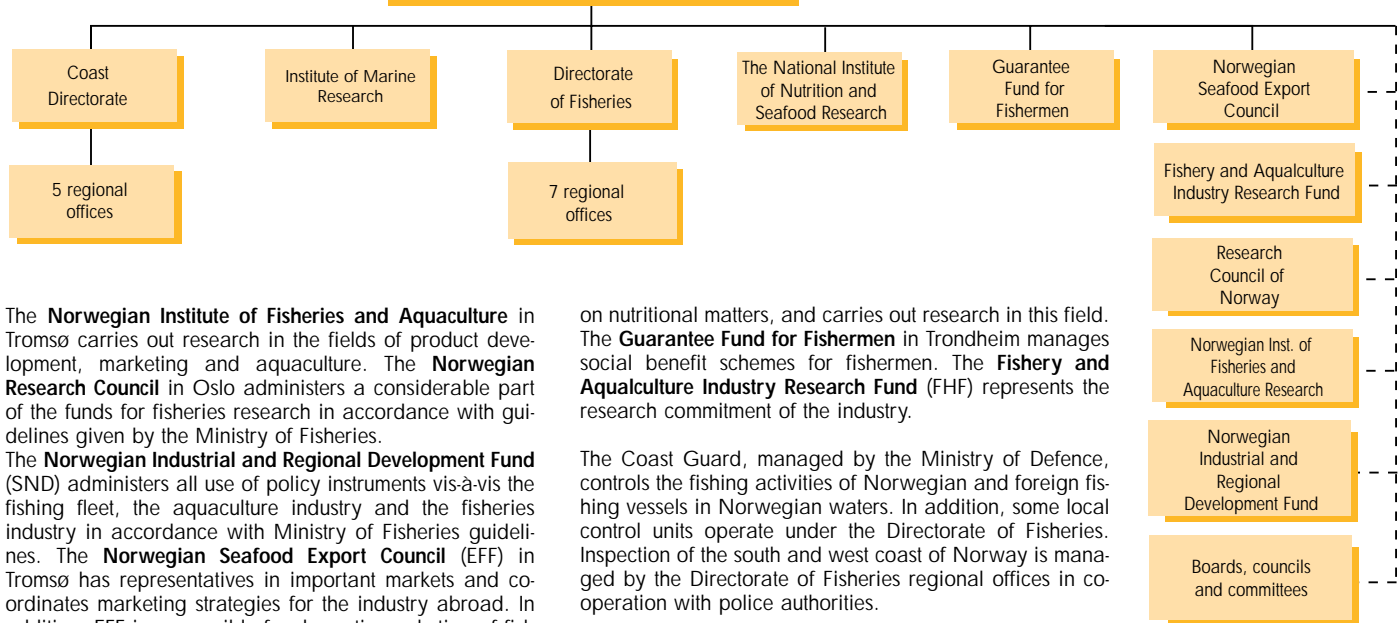
The **Coastal Administration** is a body for the Ministry of Fisheries in the port, pilot and lighthouse service. The Coastal Administration is divided into five regional offices that carry out tasks concerning the ports, pilot and lighthouse service under the direction of the **Coast Directorate** in Ålesund. The department for emergency response in Horten is a part of the Coast Directorate. The **Directorate of Fisheries** in Bergen is a body within the fisheries and fish farming administration. The regional Fisheries Administration will, as of 1 January 2004, consist of seven district offices. Their tasks consist of both advisory and control activities.

The main tasks of the **Institute of Marine Research** in Bergen are research and monitoring of the living marine resources, sea and coastal environment as well as research on fish farming and sea ranching.





## Ministry of Fisheries



The **Norwegian Institute of Fisheries and Aquaculture** in Tromsø carries out research in the fields of product development, marketing and aquaculture. The **Norwegian Research Council** in Oslo administers a considerable part of the funds for fisheries research in accordance with guidelines given by the Ministry of Fisheries.

The **Norwegian Industrial and Regional Development Fund (SND)** administers all use of policy instruments vis-à-vis the fishing fleet, the aquaculture industry and the fisheries industry in accordance with Ministry of Fisheries guidelines. The **Norwegian Seafood Export Council (EFF)** in Tromsø has representatives in important markets and coordinates marketing strategies for the industry abroad. In addition, EFF is responsible for domestic marketing of fish and fish products. The **National Institute of Nutrition and Seafood Research (NIFES)** advises the fisheries authorities

on nutritional matters, and carries out research in this field. The **Guarantee Fund for Fishermen** in Trondheim manages social benefit schemes for fishermen. The **Fishery and Aquaculture Industry Research Fund (FHF)** represents the research commitment of the industry.

The Coast Guard, managed by the Ministry of Defence, controls the fishing activities of Norwegian and foreign fishing vessels in Norwegian waters. In addition, some local control units operate under the Directorate of Fisheries. Inspection of the south and west coast of Norway is managed by the Directorate of Fisheries regional offices in cooperation with police authorities.



# e ducation, research and competence

The Oslo-based Research Council of Norway and the Institute of Marine Research in Bergen are advisory bodies to the Ministry on questions concerning fisheries research and management of marine resources.

Funding of fisheries research is channelled partly through the Research Council of Norway, and partly through the Institute of Marine Research, the National Institute of Nutrition and Seafood Research and the Norwegian Institute of Fisheries and Aquaculture Research.

The Research Council of Norway is a national body for research strategies. The purpose of the Council is to increase general knowledge and to contribute to public research needs through promoting basic and applied research in all important fields.

The Institute of Marine Research is mainly concerned with investigating the coastal and sea environment, fish stocks and other marine organisms, in addition to the aquaculture industry and sea ranching. The results of the research conducted by the institute are of great importance to the various coastal businesses. The institute administers research stations and research vessels, and has a close contact with research institutes abroad. Much of the international co-operation is channelled through the International Council for the Exploration of the Sea (ICES).

The Norwegian Institute of Fisheries and Aquaculture Research is a company in the NORUT research group and has its head office in Tromsø and a regional office in Bergen. The institute has its own aquaculture research station.

The National Institute of Nutrition and Seafood Research in Bergen advises the fisheries authorities on nutritional matters. It carries out research on the nutritive value of fish and other marine resources. The institute also undertakes nutritional studies on various types of farmed fish, and develops models for analysing nutrients.

The Fishery and Aquaculture Industry Research Fund (FHF) was founded in 2000 when the Norwegian Storting (Parliament) passed an act imposing an R&D duty on the export value of fish and other marine resources. FHF is to strengthen research and development (R&D), enhance the potential for value creation, adjustment to the environment, reorganization and innovation. Funds are to be allocated to research on issues related to the industry and to joint initiatives of benefit to the different sectors of the industry.

In addition to the research institutes mentioned above, universities, colleges and other centres also undertake research. Fishery research in Norway embraces a wide field, such as marine resources, fish health, fishery technology, the fishing industry, industrial development, nutrients and commercial issues.



es. Education and training in subjects related to fishing, sea farming, fishing and coastal industries and marketing are offered at a number of upper secondary schools in coastal districts.



**Norway was the first country in the world to establish an independent Ministry of Fisheries.**

1900: Directorate of Fisheries established (remaining until 1946 under the Ministry of Trade, Shipping, Manufacture and Fisheries).

1946: Ministry of Fisheries established.



**Research and training play an increasingly central role. Substantial pioneering work has been carried out, especially in the marine research sector, contributing to the growth of a whole school of thought at international level.**

1939: First fishermen's training school founded (Aukra)

1947: Marine Research Institute established.

1970: Act on Graduate and Postgraduate Fisheries Training passed.

1972: Norwegian Institute for Studies in Research and Higher Education established.

1973: FTFI established

1990: The Institute of Research on Fisheries and Aquaculture established.

2000: Act on duty for R&D purposes in the fisheries and aquaculture industries



**Norges Fiskarlag**  
Founded 1926  
The Norwegian Fishermen's Association

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