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Summary of the 2013 Annual Economic Report on the EU Fishing Fleet (STECF-13-18)

Scientific, Technical and Economic Committee
for Fisheries (STECF)



This report was reviewed and released by the STECF by written procedure in September 2013.

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Summary of the 2013 Annual Economic Report on the EU Fishing Fleet (STECF 13-18)

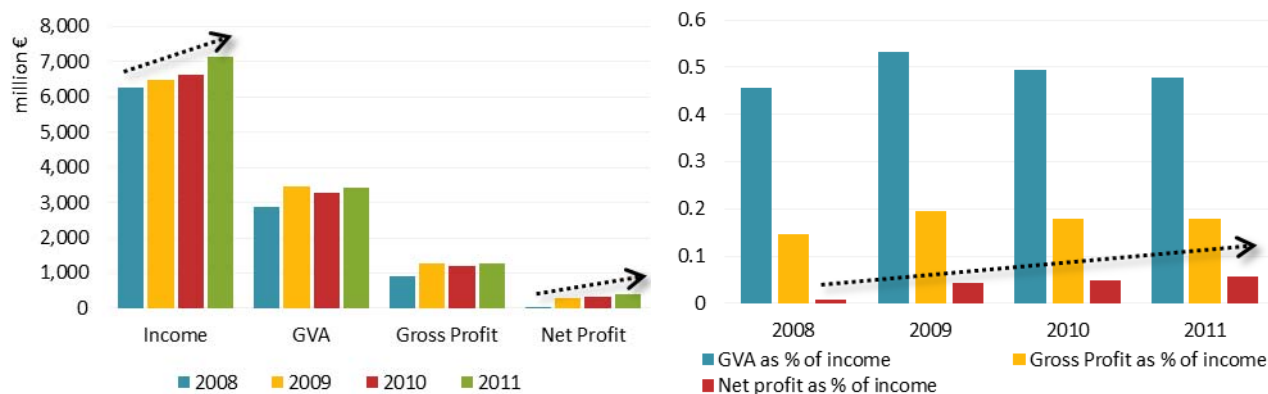
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Reports on the Economic performance of the European Fishing Fleet (AER) are prepared annually by independent experts convened under the auspices of the Scientific, Technical and Economic Committee for Fisheries (STECF). This summary report of the 2013 AER was prepared in draft by the Editors in cooperation with the Structural Policy and Economic Analysis Unit of DG Maritime affairs and Fisheries (DG MARE) who commissioned the work, and the Maritime Affairs Unit of the Joint Research Centre (action FISHREG). STECF wishes to acknowledge the extensive efforts of Natacha Carvalho, John Anderson and all of the staff in the Structural Policy and Economic Analysis Unit of DG Maritime affairs and Fisheries involved in its preparation.

This report was reviewed and adopted by the STECF by written procedure in September 2013.

1. Main Findings of the 2013 AER

The latest data from EU Member States indicate that the EU fishing fleet landed less in quantity but generated a higher first-sale value in 2011. Although costs increased overall in 2011, income also increased and to a greater extent than costs. The EU fishing fleet was therefore profitable in 2011. Profits were higher in 2011 than in 2010. The amount of Gross Value Added (GVA) generated was €3.4 billion, an increase of 4%; gross profit was €1.3 billion, a 7% increase and net profit was €410 million, an increase of 22% from 2010¹. In relative terms, net profit margin increased steadily over the period analysed, from 1% in 2008 to 6% in 2011. Although GVA as a proportion of income was 1% lower than in 2010, the fleet's gross profit margin remained stable in 2011 at 18% (Figure 1).



Source: EU Member States DCF data submissions

Figure 1 - EU Member States economic performance indicators: 2008 to 2011

EU Fleet

According to data held in the EU fleet vessel register, the total number of vessels in the EU fishing fleet on the 1st of January 2012 was 82,047, with a combined gross tonnage (GT) of 1.69 million tonnes and engine power of 6.36 million kilowatts (kW). The overall capacity of the EU fleet decreased between 2008 and 2012 (vessels: -7%, GT: -12% and kW: -9%).

The part of the EU fleet covered by the DCF data submitted² spent almost 3.8 million days at sea in 2011 and consumed 1,658 million litres of fuel. While days at sea increased almost 8% between 2008-2011, total fuel consumption decreased by 7.7% over the same period, suggesting that the EU fleet is becoming more fuel-efficient; looking for ways to reduce fuel consumption to mitigate rising fuel prices (Table 1).

According to Eurostat³, the EU fleet landed 4,669 thousand tonnes of seafood in 2011, corresponding to an estimated €6.3 billion in landed value⁴. While weight of landings decreased by 6% over the period 2008-2011, value of landings

¹ all excluding direct income subsidies and income and expenditure on leasing fishing rights

² Excludes Cyprus, Greece and Spain due to incomplete or non-submission of data. The coverage in this analysis represents around 90% of the whole EU fleet in GT.

³ <http://epp.eurostat.ec.europa.eu/portal/page/portal/fisheries/data/database>

increased almost 9% (Table 1). The decrease in volume of landings was mainly attributable to the long-distance fleet – vessels that are active outside EU waters - and, to a lesser extent, the large-scale fleet operating within EU waters. The small-scale fleet saw its landings, in terms of volume and value, increase during the period.

The EU fleet's net profit margin increased steadily over the years analysed, from 1% in 2008 to 6% in 2011. GVA as a proportion of income was however, 1% lower than in 2010, while gross profit margin remained stable at around 18%. Overall, the economic performance of the EU fleet improved in 2011 compared to 2010; showing some signs of stagnation but nonetheless consolidating the improving trends observed since 2008.

Economic performance estimates for 2012 suggest that although fleet income increased in most Member States, GVA as a proportion of income increased in only half of those Member States while gross and net profit margins increased in roughly one third of those Member States. Although preliminary economic performance projections for a number of key fleets in 2013 suggest mixed performance, it was not possible to project an overall economic position in 2013 due to poor quality and missing data for a number of Member States' fleets.

Small-scale fleet

Based on EU Member States' DCF data submissions, the EU small-scale fleet^{5 6} in 2011 consisted of around 36 thousand vessels⁷ (Table 1). It represented 40% of employment in the EU fleet⁸ and 6% of the total gross tonnage of the EU fleet⁵. The small-scale segment spent 61% of the total number of days at sea for the EU fleet⁹ in 2011 but consumed only 10% of the total fuel consumed by the EU fleet⁹ in 2011. While the small-scale fleet represented around 6% of the total EU fleet¹⁰ in terms of landed weight, it also produced 15% of total landed value in 2011, indicating that the small scale fleet generally obtains higher first sale prices. The small-scale fleet contributed 19% of the GVA, 16% of gross profits and 20% of net profits produced by the total EU fleet⁸ in 2011. Net profit generated by the small-scale fleet increased substantially over the period 2008-2011, see table 1. In relative terms, and compared to the other main fleet components, the small scale fleet generated the highest GVA, gross profit and net profit as a % of income, 62%, 20% and 8% respectively (Table 2).

Large-scale fleet

Based on EU Member States DCF data submissions, in 2011 the EU large-scale fleet^{5 11} consisted of almost 27.4 thousand vessels (Table 1). It represented 53% of total EU fleet employment⁸ and 75% of total EU fleet tonnage^{Error! Bookmark not defined.}. The large-scale fleet spent 38% of the total number of days at sea for the EU fleet^{Error! Bookmark not defined.} in 2011 but consumed around 85% of the total fuel consumption consumed⁹. It contributed 86% of the landings in weight and 80% in value of the total seafood landings by the EU fleet¹⁰ in 2011, suggesting an overall lower value catch composition. The large-scale fleet contributed around 71% of total GVA, 72% of gross profits and 65% of net profits produced by the EU fleet⁸ in 2011. Net profit generated by the large-scale fleet also increased over the period 2008-2011 (Table 1). In relative terms, the large-scale fleet generated a GVA, gross profit and net profit margin of 48%, 18% and 5% respectively (Table 2).

Long-distance fleet

Based on EU Member States DCF data submissions, in 2011 the EU distant water fleet^{12 13 5} accounted for only 1% of the total number of vessels in the EU fleet⁵, but represented 7% of total EU fleet employment⁸ and 19% of total EU fleet tonnage⁵. The distant water fleet spent less than 1% of the total number of days at sea for the overall EU fleet⁹ in 2011 and consumed around 5% of total fuel consumed by the EU fleet⁹. It also contributed 7% in weight and 5% in value of

⁴ DCF data on landings in weight and value excludes Greece and Spain due to non-submission of data. The DCF data covered approximately 76% of the total EU landings in value and 78% of the landings in weight.

⁵ excluding data from Cyprus and Greece which were not reported

⁶ Small scale fleet segment includes all vessels under 12 metres using static gears (drift and/or fixed netters, vessels using pots and/or traps, vessels using hooks, vessels using passive gears only for vessels <12m, vessels using other passive gears, vessels using polyvalent passive gears only, vessels using active and passive gears).

⁷ If datasets for the three MS who did not provide data were considered, the number of vessels and employment associated to the small-scale fleet would be significantly larger.

⁸ excluding data from Cyprus, Estonia and Greece which were not reported

⁹ excluding data from Cyprus, Estonia and Greece and Spain which were not reported

¹⁰ excluding data from Spain and Greece which were not reported

¹¹ Large scale fleet includes all vessels using towed gears (dredgers, demersal trawlers and/or demersal seiners, vessel using other active gears, vessels using polyvalent active gears only, purse seiners, beam trawlers, pelagic trawlers) and vessels over 12 meters using static gears operating in EU fishing regions as well as in NAFO and NEAFC fishing areas.

¹² Long distance fleet includes EU-registered vessels over 24 metres operating in Other Fishing regions including EU outermost regions.

¹³ Data availability for the EU long-distant water fleet is limited and may be underreported or missing in many cases for several MS, due mainly to data collection and confidentiality reasons (few fishing vessels owned by reduced number of enterprises). To protect commercial sensitivity, economic data on these fleets are often omitted or aggregated into other fleet segments.

total EU fleet's¹⁰ seafood landings in 2011 (Table 1). The distant water fleet contributed around 10% of the total GVA, 12% of gross profit and 14% of the net profit produced by the EU fleet⁸ (all excluding Cyprus, Estonia and Greece due to non-submission of data) in 2011. It moved from a loss making position in 2010 to post a profit in 2011, with net profits increasing substantially over the period 2008-2011 (Table 1). In relative terms, the distant-water fleet generated a GVA, gross profit and net profit margin of 33%, 14% and 6% respectively (Table 2).

Table 1 – Main trends for the EU fleet by main fishing activity: 2008-2011

Development trend based on the % change (%Δ) of the net profit margin in 2011 to the average net profit margin in 2008-2010. Arrows indicate change (Δ) in relation to the average 2008-2010: (↗) increase; (↘) decrease and (↔) stable/no change (Δ between -1 and +1%). The analysis in the table refers to the sample covered under the DCF available data, representing 77% of the whole EU fleet.

	2008	as % of total	2009	as % of total	2010	as % of total	2011	as % of total	%Δ to 2010	Development trend		
No. Vessels	68,227.3		66,107.0		65,332.4		63,674.7		-2.5%	↘	-4.3%	↘
<i>Large-scale fleet</i>	30,930	45%	29,191	44%	27,746	42%	27,361	43%	-1.4%	↘	-6.6%	↘
<i>Small-scale fleet</i>	36,925	54%	36,545	55%	37,192	57%	35,945	56%	-3.4%	↘	-2.6%	↘
<i>Distant-water fleet</i>	372	1%	371	1%	395	1%	369	1%	-6.6%	↘	-2.7%	↘
Vessel tonnage	1,778,252.4		1,715,678.9		1,655,240.1		1,596,879.2		-3.5%	↘	-7.0%	↘
<i>Large-scale fleet</i>	1,405,401	79%	1,315,295	77%	1,263,228	76%	1,204,689	75%	-4.6%	↘	-9.3%	↘
<i>Small-scale fleet</i>	97,066	5%	96,460	6%	96,516	6%	95,315	6%	-1.2%	↘	-1.4%	↘
<i>Distant-water fleet</i>	275,785	16%	303,924	18%	295,496	18%	296,875	19%	0.5%	↔	1.8%	↗
FTE (national)	101,080.8		104,159.9		105,031.8		98,561.2		-6.2%	↘	-4.7%	↘
<i>Large-scale fleet</i>	56,836	56%	58,075	56%	53,401	51%	50,650	51%	-5.2%	↘	-9.7%	↘
<i>Small-scale fleet</i>	36,535	36%	37,396	36%	41,961	40%	40,713	41%	-3.0%	↘	5.4%	↗
<i>Distant-water fleet</i>	7,710	8%	8,689	8%	9,670	9%	7,199	7%	-25.6%	↘	-17.2%	↘
Days at sea (thousand)	3,252.3		3,410.6		3,778.5		3,756.8		-0.6%	↔	7.9%	↗
<i>Large-scale fleet</i>	1,253	39%	1,261	37%	1,491	39%	1,441	38%	-3.4%	↘	7.9%	↗
<i>Small-scale fleet</i>	1,989	61%	2,124	62%	2,270	60%	2,303	61%	1.4%	↗	8.2%	↗
<i>Distant-water fleet</i>	10	0%	26	1%	17	0%	13	0%	-24.2%	↘	-26.9%	↘
Energy consumption (million litres)	1,766.4		1,860.2		1,760.1		1,657.7		-5.8%	↘	-7.7%	↘
<i>Large-scale fleet</i>	1,596	90%	1,593	86%	1,513	86%	1,407	85%	-7.0%	↘	-10.3%	↘
<i>Small-scale fleet</i>	149	8%	168	9%	159	9%	165	10%	3.7%	↗	3.9%	↗
<i>Distant-water fleet</i>	21	1%	100	5%	88	5%	87	5%	-1.9%	↘	24.0%	↗
Landings value (million €)	4,595.1		4,358.8		4,609.7		4,911.0		6.5%	↗	8.6%	↗
<i>Large-scale fleet</i>	3,546	77%	3,449	79%	3,733	81%	3,949	80%	5.8%	↗	10.4%	↗
<i>Small-scale fleet</i>	662	14%	727	17%	691	15%	734	15%	6.1%	↗	5.8%	↗
<i>Distant-water fleet</i>	386	8%	183	4%	185	4%	228	5%	23.4%	↗	-9.2%	↘
Landings weight (thousand tonnes)	3,623.1		3,812.7		3,813.7		3,526.4		-7.5%	↘	-6.0%	↘
<i>Large-scale fleet</i>	3,085	85%	3,214	84%	3,351	88%	3,049	86%	-9.0%	↘	-5.2%	↘
<i>Small-scale fleet</i>	194	5%	222	6%	215	6%	218	6%	1.4%	↗	3.7%	↗
<i>Distant-water fleet</i>	344	9%	377	10%	248	7%	259	7%	4.6%	↗	-19.7%	↘
Revenue (million €)	6,255.7		6,468.2		6,633.1		7,134.2		7.6%	↗	10.6%	↗
<i>Large-scale fleet</i>	4,690	75%	4,715	73%	4,680	71%	5,041	71%	7.7%	↗	7.4%	↗
<i>Small-scale fleet</i>	949	15%	998	15%	1,029	16%	1,046	15%	1.6%	↗	5.4%	↗
<i>Distant-water fleet</i>	617	10%	755	12%	924	14%	1,047	15%	13.3%	↗	36.8%	↗
Energy costs (million €)	1,461.3		1,112.1		1,272.1		1,531.1		20.4%	↗	19.4%	↗
<i>Large-scale fleet</i>	1,185	81%	845	76%	951	75%	1,166	76%	22.5%	↗	17.3%	↗
<i>Small-scale fleet</i>	113	8%	99	9%	121	10%	142	9%	17.3%	↗	27.6%	↗
<i>Distant-water fleet</i>	164	11%	168	15%	200	16%	223	15%	11.9%	↗	26.1%	↗
Labour costs (million €)	1,938.6		2,195.3		2,092.1		2,126.6		1.6%	↗	2.5%	↗
<i>Large-scale fleet</i>	1,424	73%	1,591	72%	1,464	70%	1,491	70%	1.8%	↗	-0.1%	↔
<i>Small-scale fleet</i>	410	21%	447	20%	440	21%	437	21%	-0.7%	↔	1.0%	↗
<i>Distant-water fleet</i>	105	5%	157	7%	188	9%	199	9%	5.7%	↗	32.6%	↗
GVA (million €)	2,848.1		3,444.1		3,282.2		3,413.4		4.0%	↗	7.0%	↗
<i>Large-scale fleet</i>	2,106	74%	2,656	77%	2,383	73%	2,420	71%	1.6%	↗	1.6%	↗
<i>Small-scale fleet</i>	599	21%	649	19%	649	20%	643	19%	-0.9%	↘	1.7%	↗
<i>Distant-water fleet</i>	143	5%	139	4%	250	8%	350	10%	39.9%	↗	97.6%	↗
Gross profit (million €)	914.8		1,253.6		1,194.6		1,286.8		7.7%	↗	0.1	↗
<i>Large-scale fleet</i>	686.1	75%	1,068.8	85%	922.9	77%	929.4	72%	0.7%	↔	4.1%	↗
<i>Small-scale fleet</i>	190.8	21%	202.8	16%	209.6	18%	206.1	16%	-1.7%	↘	2.5%	↗
<i>Distant-water fleet</i>	37.8	4%	-18	-1%	62.1	5%	151.3	12%	143%	↗	453.8%	↗
Net profit (million €)	44.9		271.9		319.2		410.2		28.5%	↗	93.5%	↗
<i>Large-scale fleet</i>	4.2	9%	301.2	111%	283.3	89%	268.2	65%	-5.3%	↘	36.7%	↗
<i>Small-scale fleet</i>	71.9	160%	49.6	18%	62.9	20%	83.2	20%	32.2%	↗	35.3%	↗
<i>Distant-water fleet</i>	-31.2	-69%	-78.9	-29%	-27.0	-8%	58.8	14%	318%	↗	228.7%	↗

Source: EU Member States 2013 DCF data submissions.

Table 2 – Main performance indicators for the EU fleet by main fishing activity: 2008-2011

Development trend based on the % change (%Δ) of the net profit margin in 2011 to the average net profit margin in 2008-2010. Arrows indicate change (Δ) in relation to the average 2008-2010: (↗) increase; (↘) decrease and (↔) stable/no change (Δ between -1 and +1%).

	2008	2009	2010	2011	%Δ to 2010	Development
GVA as % of income	46%	53%	49%	48%	-3.4%	↘ -3.2% ↘
<i>Large-scale fleet</i>	44.9%	56.3%	50.9%	48.0%	-6.1%	↘ -5% ↘
<i>Small-scale fleet</i>	63.1%	65.0%	63.0%	61.5%	-2.5%	↘ -4% ↘
<i>Distant-water fleet</i>	23.1%	18.4%	27.1%	33.4%	19.0%	↗ 46% ↗
Gross profit margin	15%	19%	18%	18%	0.1%	↔ 4.0% ↗
<i>Large-scale fleet</i>	14.6%	22.7%	19.7%	18.4%	-7.0%	↘ -3% ↘
<i>Small-scale fleet</i>	20.1%	20.3%	20.4%	19.7%	-3.4%	↘ -3% ↘
<i>Distant-water fleet</i>	6.1%	-2.4%	6.7%	14.4%	53.5%	↗ 314% ↗
Net profit margin	1%	4%	5%	6%	16.3%	↗ 77.2% ↗
<i>Large-scale fleet</i>	0.1%	6.4%	6.1%	5.3%	-13.8%	↘ 27% ↗
<i>Small-scale fleet</i>	7.6%	5.0%	6.1%	8.0%	23.1%	↗ 28% ↗
<i>Distant-water fleet</i>	-5.1%	-10.4%	-2.9%	5.6%	152.0%	↗ 191% ↗

Source: EU Member States 2013 DCF data submissions

Main drivers and trends affecting the economic performance of the EU fleet

Overall, in 2011 there was a decrease in the total volume of seafood landed by the EU fleet but an increased landed value. Although total costs of the EU fleet increased, total income increased more, and subsequently the economic performance of the EU fleet showed improvements to 2010, with 6% of income retained as net profit. The data shows that the economic performance of the EU fleet has been improving gradually over recent years, from a net profit margin of 1% in 2008 to 6% in 2011. However, as the EU fleet is very diverse, operating in many different fisheries using a wide variety of fishing techniques, this trend did not apply to all fleet segments. While the EU fleet overall was profitable in 2011, six national fleets and around 45% of the fleet segments made net losses. Economic performance estimates for 2012 suggest increased income for nine out of the 14 Member State fleets that provided sufficient data for analysis, while GVA as a proportion of total income increased in half and net profit margin increased in a third of those Member State fleets.

Factors that may have contributed to good/poor economic performance include, but are not limited to the following (in no specific order):

- Reduced TACs and quotas for several key stocks
- Increasing fuel prices and other operating costs
- The effects of the global economic crisis which continues to affect internal and international markets for some species and limits access to credit
- Market saturation (e.g. Baltic Cod)
- Low abundance of some species
- Severe weather conditions
- Insufficient routes to market
- Shortage of local crews as young people are less and less attracted to fishing as a career choice
- Increase in areas that prohibit or limit specific fishing activity/access due to other spatial marine use inter alia offshore renewable energy production, MPA's and areas closures for stock specific recovery measures

Factors that may have contributed to improved economic performance include, but are not limited to the following (in no specific order):

- Higher average first sale prices for many commercially important species
- Favourable market conditions (internal and export) for several species
- Implementation of certification schemes and the growing demand for certified products
- Capacity reduction
- More fuel efficient fishing techniques and fishing behaviour
- Recovery of some stocks, such as the Baltic herring, Baltic cod and North Sea plaice, leading to increased TAC and quotas
- Innovation projects

The main issues affecting fleet economic performance in each Member State can be found in section 7 of this summary report.

2. Introduction/Background

The 2013 Annual Economic Report (AER) on the European Union (EU) fishing fleet provides a comprehensive overview of the latest information available on the structure and economic performance of EU Member States fishing fleets.

The 2013 AER (STECF 13-15) was produced by two working groups of economic experts (EWG 13-03 and EWG 13-04) convened under the Scientific, Technical and Economic Committee for Fisheries (STECF). The data used to compile all the various analyses contained within the report were collected under the data collection framework (DCF), cf. Council regulation (European Commission (EC) No 199/2008 of 25th February 2008). The data call requested economic and transversal data for the years 2008 to 2013.

This summary document aims to highlight some key results from the 2013 AER¹⁴, on which it is based. For a more in depth assessment of the economic performance of the EU fleet as well as further information on the methodology used, the 2013 AER full report (STECF 13-15) should be consulted.

The 2013 AER full report along with the accompanying data sets are available at:

<http://stecf.jrc.ec.europa.eu/reports/economic>

3. EU Fishing Fleet Structure

The EU fishing fleet is very diverse, using a large variety of fishing gear types on vessels up to and over 100 meters in length. According to the data held by Eurostat and the EU fleet vessel register, the total number of vessels in the EU fishing fleet in 2012 was 82,047, with a combined gross tonnage (GT) of 1.69 million tonnes and engine power of 6.36 million kilowatts (kW). The number of vessels registered in the EU fleet in 2011 amounted to 83,590, with a combined gross tonnage (GT) of 1.74 million tonnes and engine power of 6.5 million kilowatts (kW). Overall, capacity of the EU fleet decreased between 2008 and 2012 by: vessels -6.8%, GT -12.5% and kW -9.2%. Greece had the highest number of registered vessels in 2011, accounting for 20.5% of the EU total. The Italian fleet was the second largest in number, accounting for 16% of the EU total, followed by Spain at 13%. Spain's fishing fleet was the largest in terms of GT, with almost 24% of the EU total, followed by the United Kingdom at 12% and Italy at 10.6%. Italy's fishing fleet was the largest in terms of engine power, with 17% of the EU total, followed by France (15%) and then Spain (14%) (Table 3).

Table 4 and Table 5 break down EU fleet capacity by main type of fishing operation, into small-scale, large-scale and long-distance fleets, according to Member States data submissions. By definition, the *small-scale fleet* includes all fleet segments under 12m in length using non-towed gears (i.e. passive/static)¹⁵ and the long-distance fleet, all fleet segments over 24m operating predominately in other fishing areas, including EU outermost regions (e.g. Canaries and Madeira). Here, the large-scale fleet includes all fleet segments not included in either the small or long-distance fleets, i.e. all vessels using towed (active/mobile)¹⁶ and vessels over 12m using non-towed gears, fishing in EU waters as well as in NAFO and NEAFC fishing areas.

In 2011, according to the DCF data submitted, the EU small-scale fleet consisted of almost 36 thousand vessels, the large-scale fleet 27 thousand vessels and the long-distance fleet 369 vessels, accounting for 56%, 43% and 1% of the vessels in the EU fleet, respectively. Overall, the total number of vessels in the EU fleet has decreased, and of that total, the number of vessels actively engaged in fishing operations has also decreased.

According to the DCF data submitted (excludes Cyprus and Greece), Italy possessed the largest small-scale fleet in 2011 with 24% of the number of vessels, followed by Spain (19%), France (12%) and then Portugal (11%). Combined, these four MS possessed 66% of the number of EU small-scale vessels covered. With over 5,800 vessels, Italy also encompassed the largest large-scale fleet (21%), followed by Portugal with more than 4,500 vessels (16%). Spain possessed the largest long-distance fleet with 290 vessels, totalling 79% of the vessels and 58% of the gross tonnage of the EU distant water fleet.

¹⁴ An overall evaluation of the economic performance of the EU fishing fleet in 2011 was not possible due to outstanding and/or erroneous data submissions. The main data issues encountered in the 2013 AER included, but were not limited to: (1) Greece – no data submitted; (2) Cyprus and Spain – substantial amount of data not provided and (3) Estonia – incomplete and questionable data sets. Other major data limitations are referred to in the text for clarity.

¹⁵ Static/mobile gears include: drift and/or fixed netters, vessels using pots and/or traps, vessels using hooks, vessels using passive gears only for vessels < 12m, vessels using other passive gears, vessels using polyvalent passive gears only, vessels using active and passive gears.

¹⁶ Towed/active gears include: dredgers, demersal trawlers and/or demersal seiners, vessel using other active gears, vessels using polyvalent active gears only, purse seiners, beam trawlers, pelagic trawlers.

Table 3 – Fleet register capacity data for the EU fishing fleet in 2011

 Arrows indicate change (Δ) in relation to 2010: (\uparrow) increase; (\downarrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

	N vessels	% of EU total	Δ to 2010	Gross tonnage (thousand tonnes)	% of EU total	Δ to 2010	Engine power (thousand kW)	% of EU total	Δ to 2010
BEL	89	0.1%	\leftrightarrow	15.8	0.9%	\downarrow	51.2	0.8%	\leftrightarrow
BGR	2,340	2.8%	\uparrow	7.9	0.5%	\uparrow	63.4	1.0%	\uparrow
CYP	1,004	1.2%	\downarrow	4.1	0.2%	\downarrow	43.1	0.7%	\downarrow
DNK	2,819	3.4%	\leftrightarrow	66.0	3.8%	\downarrow	240.1	3.7%	\downarrow
DEU	1,655	2.0%	\downarrow	67.7	3.9%	\leftrightarrow	158.8	2.4%	\downarrow
ESP	10,850	13.0%	\downarrow	414.3	23.8%	\downarrow	934.6	14.3%	\downarrow
EST	934	1.1%	\downarrow	14.7	0.8%	\leftrightarrow	40.2	0.6%	\leftrightarrow
FIN	3,365	4.0%	\uparrow	16.7	1.0%	\uparrow	172.9	2.7%	\uparrow
FRA	7,222	8.6%	\leftrightarrow	172.9	9.9%	\downarrow	991.6	15.2%	\downarrow
GBR	6,475	7.7%	\downarrow	207.6	11.9%	\leftrightarrow	827.6	12.7%	\downarrow
GRC	17,112	20.5%	\leftrightarrow	86.9	5.0%	\downarrow	502.9	7.7%	\leftrightarrow
IRL	2,146	2.6%	\uparrow	69.2	4.0%	\leftrightarrow	197.6	3.0%	\uparrow
ITA	13,449	16.1%	\leftrightarrow	185.4	10.6%	\downarrow	1,106.9	17.0%	\downarrow
LTU	171	0.2%	\downarrow	46.0	2.6%	\downarrow	54.4	0.8%	\downarrow
LVA	786	0.9%	\downarrow	40.8	2.3%	\downarrow	61.5	0.9%	\downarrow
MLT	1,090	1.3%	\downarrow	8.2	0.5%	\downarrow	80.3	1.2%	\downarrow
NLD	847	1.0%	\uparrow	146.8	8.4%	\downarrow	343.0	5.3%	\downarrow
POL	793	0.9%	\downarrow	37.3	2.1%	\downarrow	86.9	1.3%	\downarrow
PRT	8,442	10.1%	\downarrow	101.3	5.8%	\downarrow	371.2	5.7%	\downarrow
ROM	476	0.6%	\uparrow	1.2	0.1%	\downarrow	6.6	0.1%	\downarrow
SVN	183	0.2%	\downarrow	1.0	0.1%	\leftrightarrow	10.9	0.2%	\leftrightarrow
SWE	1,342	1.6%	\downarrow	32.2	1.8%	\downarrow	175.4	2.7%	\downarrow
EU total	83,590		\leftrightarrow	1,743.9		\downarrow	6,521.0		\downarrow

Source: EU Fleet Register

Table 4 - Capacity data for the EU fishing fleet in 2011, by main fishing and Member State.

 Arrows indicate change (Δ) in relation to 2010: (\uparrow) increase; (\downarrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

	EU FLEET						SMALL-SCALE FLEET			LARGE-SCALE FLEET			LONG-DISTANT WATER FLEET		
	N vessels	% of EU total	Δ 2010	Inactive vessels	% of EU total	Δ 2010	N vessels	% of EU total	Δ 2010	N vessels	% of EU total	Δ 2010	N vessels	% of EU total	Δ 2010
BEL	89	0.1%	\leftrightarrow	4	0.0%	\uparrow	-			89	0.3%	\uparrow	-		
BGR	1,010	1.6%	\downarrow	1,826	10.4%	\uparrow	926	2.6%	\downarrow	84	0.3%	\downarrow	-		
DEU	1,664	2.6%	\downarrow	513	2.9%	\downarrow	883	2.5%	\downarrow	779	2.8%	\downarrow	2	1%	\uparrow
DNK	2,663	4.2%	\leftrightarrow	1,003	5.7%	\uparrow	1,094	3.0%	\downarrow	1,569	5.7%	\leftrightarrow	-		
ESP	10,892	17.1%	\downarrow	3,312	18.8%	\uparrow	6,830	19.0%	\downarrow	3,772	13.8%	\leftrightarrow	290	79%	\downarrow
EST	934	1.5%	\downarrow	14	0.1%	\downarrow	876	2.4%	\leftrightarrow	57	0.2%	\downarrow	1	0%	\leftrightarrow
FIN	3,365	5.3%	\uparrow	1,687	9.6%	\uparrow	1,589	4.4%	\uparrow	1,776	6.5%	\uparrow	-		
FRA	6,004	9.4%	\downarrow	n/a			4,300	12.0%	\downarrow	1,684	6.2%	\downarrow	20	5%	\downarrow
GBR	6,467	10.2%	\downarrow	2,088	11.9%	\downarrow	3,198	8.9%	\uparrow	3,269	11.9%	\downarrow	-		
IRL	2,162	3.4%	\uparrow	705	4.0%	\uparrow	788	2.2%	\uparrow	1,374	5.0%	\uparrow	-		
ITA	14,715	23.1%	\downarrow	1,568	8.9%	\downarrow	8,875	24.7%	\leftrightarrow	5,824	21.3%	\downarrow	16	4%	\leftrightarrow
LTU	171	0.3%	\downarrow	125	0.7%	\downarrow	60	0.2%	\downarrow	103	0.4%	\downarrow	8	2%	\uparrow
LVA	319	0.5%	\downarrow	n/a			245	0.7%	\downarrow	74	0.3%	\downarrow	-		
MLT	1,087	1.7%	\downarrow	613	3.5%	\uparrow	532	1.5%	\downarrow	555	2.0%	\uparrow	-		
NLD	738	1.2%	\uparrow	127	0.7%	\uparrow	199	0.6%	\downarrow	539	2.0%	\uparrow	-		
POL	805	1.3%	\downarrow	41	0.2%	\downarrow	526	1.5%	\leftrightarrow	276	1.0%	\downarrow	3	1%	\leftrightarrow
PRT	8,557	13.4%	\leftrightarrow	3,466	19.7%	\uparrow	4,004	11.1%	\downarrow	4,524	16.5%	\uparrow	29	8%	\downarrow
ROU	488	0.8%	\uparrow	36	0.2%	\uparrow	197	0.5%	\downarrow	291	1.1%	\uparrow	-		
SVN	186	0.3%	\leftrightarrow	93	0.5%	\uparrow	62	0.2%	\downarrow	124	0.5%	\uparrow	-		
SWE	1,359	2.1%	\downarrow	359	2.0%	\downarrow	761	2.1%	\downarrow	598	2.2%	\downarrow	-		
EU Total	63,675		\downarrow	17,580		\uparrow	35,945	56%	\downarrow	27,361	43.0%	\downarrow	369	1%	\downarrow

Source: EU Member States 2013 DCF data submissions.

Table 5 - Capacity data for the EU fishing fleet in 2011, by main fishing activity and Member State

 Arrows indicate change (Δ) in relation to 2010: (\nearrow) increase; (\searrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

	SMALL SCALE FLEET						LARGE SCALE FLEET						LONG-DISTANT WATER FLEET					
	Engine power (kW)	% of EU total	Δ 2010	GT (tonnes)	% of EU total	Δ 2010	Engine power (kW)	% of EU total	Δ 2010	GT (tonnes)	% of EU total	Δ 2010	Engine power (kW)	% of EU total	Δ 2010	GT (tonnes)	% of EU total	Δ 2010
BEL	-	-	-	-	-	-	51,590	0.9%	\leftrightarrow	15,812	1.0%	\searrow	-	-	-	-	-	-
BGR	19,791	0.3%	\searrow	1,749	0.1%	\searrow	28,590	0.5%	\nearrow	3,218	0.2%	\searrow	-	-	-	-	-	-
DEU	22,625	0.4%	\searrow	2,387	0.1%	\searrow	121,881	2.1%	\searrow	47,324	3.0%	\searrow	11,299	0.2%	\nearrow	14,924	1%	\nearrow
DNK	42,666	0.7%	\searrow	4,039	0.3%	\searrow	204,766	3.5%	\leftrightarrow	63,504	4.0%	\leftrightarrow	-	-	-	-	-	-
ESP	144,315	2.5%	\searrow	14,729	0.9%	\searrow	590,192	10.0%	\nearrow	226,617	14.2%	\searrow	248,725	4.2%	\searrow	173,322	11%	\searrow
EST	14,370	0.2%	\searrow	1,741	0.1%	\searrow	29,082	0.5%	\leftrightarrow	12,373	0.8%	\searrow	904	0.02%	-	555	0%	-
FIN	75,801	1.3%	\nearrow	4,200	0.3%	\nearrow	95,332	1.6%	\leftrightarrow	12,461	0.8%	\nearrow	-	-	-	-	-	-
FRA	413,678	7.0%	\nearrow	15,328	1.0%	\leftrightarrow	412,786	7.0%	\searrow	112,080	7.0%	\searrow	58,673	1.0%	\nearrow	33,633	2%	\nearrow
GBR	190,279	3.2%	\nearrow	12,180	0.8%	\nearrow	644,409	11.0%	\searrow	194,988	12.2%	\leftrightarrow	-	-	-	-	-	-
IRL	32,111	0.5%	\leftrightarrow	3,418	0.2%	\nearrow	164,834	2.8%	\leftrightarrow	68,748	4.3%	\nearrow	-	-	-	-	-	-
ITA	256,031	4.4%	\nearrow	17,192	1.1%	\nearrow	845,365	14.4%	\leftrightarrow	160,110	10.0%	\searrow	17,214	0.3%	-	7,736	0%	\leftrightarrow
LTU	1,121	0.0%	\searrow	65	0.0%	\searrow	18,663	0.3%	\searrow	8,821	0.6%	\searrow	36,602	0.6%	\nearrow	37,079	2%	\nearrow
LVA	2,795	0.0%	\searrow	476	0.0%	\searrow	23,899	0.4%	\nearrow	8,505	0.5%	\searrow	-	-	-	-	-	-
MLT	30,532	0.5%	\searrow	1,387	0.1%	\searrow	54,928	0.9%	\nearrow	12,107	0.8%	\nearrow	-	-	-	-	-	-
NLD	19,362	0.3%	\nearrow	1,667	0.1%	\nearrow	274,422	4.7%	\leftrightarrow	130,522	8.2%	\searrow	-	-	-	-	-	-
POL	19,916	0.3%	\leftrightarrow	2,416	0.2%	\nearrow	56,766	1.0%	\leftrightarrow	16,089	1.0%	\searrow	15,040	0.3%	-	19,471	1%	-
PRT	115,963	2.0%	\searrow	8,364	0.5%	\searrow	242,728	4.1%	\nearrow	83,974	5.3%	\leftrightarrow	18,935	0.3%	\searrow	10,156	1%	\searrow
ROU	3,427	0.1%	\nearrow	244	0.0%	\nearrow	2,020	0.0%	\searrow	756	0.0%	\searrow	-	-	-	-	-	-
SVN	2,539	0.04%	\searrow	167	0.0%	\searrow	8,418	0.1%	\nearrow	838	0.1%	\nearrow	-	-	-	-	-	-
SWE	52,472	0.9%	\leftrightarrow	3,565	0.2%	\leftrightarrow	143,950	2.4%	\leftrightarrow	29,375	1.8%	\searrow	-	-	-	-	-	-
EU Total	1,459,793	24.8%	\leftrightarrow	95,315	6.0%	\searrow	4,014,622	68.3%	\leftrightarrow	1,204,689	75.4%	\searrow	407,392	6.9%	\leftrightarrow	296,875	19%	\leftrightarrow

Source: EU Member States 2013 DCF data submissions

4. EU Fleet Socio-Economic Structure

According to the DCF data submitted by Member States (national totals¹⁷), the total number of fishers employed in the EU fleet (excluding Cyprus, Estonia and Greece for incomplete or non-data submission) in 2011 was 127,686¹⁸, a 5.9% decrease when compared to 2010 but around the same level as in 2008. Employment in the EU fishing fleet, measured in full time equivalents (FTEs), totalled 98,561 in 2011, a 6% decrease from the 105,032 FTE in 2010. This decrease of on-board employment follows the reduction in the number of EU vessels. The three countries with the highest employment levels, Spain, Italy and Portugal, accounted for 71% of the total EU FTE employment in 2011. Spain had the highest level of employment at 33% of the EU total, followed by Italy at 21% and Portugal at 17% (Table 6).

Data on crew costs and employment levels submitted by Member States show that average wages in the EU fish catching sector oscillated between 2008 and 2011, and appear to fluctuate in line with landings value and fuel costs. According to DCF data, the average wage per FTE in 2011 was €21,577, an 8% increase compared to 2010 levels. At €77 thousand, Belgian (FTE) fishers earned the highest wages on average; over three and a half times more than the average EU fisher. At €69 thousand, Danish fishers earned three times more than the average EU fisher while French fishers, at €55 thousand, slightly more than two and a half times. On the other hand, the data suggests that Bulgarian (FTE) fishers received the lowest wages in the EU, earning on average €982 in 2011 while the Polish fishers received the second lowest average wages at €8000 in 2011 (Table 6).

When analysed by main fishing activity, the large-scale fleet employed the most fishers at 54.6 thousand FTE (51% of the EU total), followed by the small-scale fleet with around 40.7 thousand FTE (41% of the EU total). The distant-water fleet accounted for the remaining 7.3% of the EU fishers in FTE (Table 7).

The Italian fleet had the largest small-scale fishing population with almost 10 thousand FTE in 2011, suggesting that average crew size in the segment is 1.13 FTE per vessel. The high ratio FTE/total employed observed in the Italian and Spanish small-scale fleets suggests that fishing is mostly a part-time occupation. Wage per FTE in the EU small-scale fleet averaged €10,730 in 2011. Danish small-scale fishers earned the most at €51,360 a year, followed by French small-scale fishers (€41,955) and then Swedish fishers (€26,635) (Table 7). The Spanish fleet had the largest large-scale fishing population with 18 thousand FTE in 2011, accounting for almost 18% of the EU total. The data also suggests that the average large-scale fisher (FTE) earned €27,243 in 2011 with the average FTE earnings by Member State as follows: Belgium, €77,565; Denmark, €72,500; Germany, €67,897. Long-distance fleet fishers earned on average €27,598 in 2011, with French fishers earning the highest average wage

¹⁷ Data for national totals submitted by MS may not necessarily equate to corresponding values at the fleet segment level.

¹⁸ Although Cyprus, Estonia and Greece did not submit any data, it is possible to estimate that total employment will be in the region of 140,000 fishermen.

at €81,477. While average wages in the large and long-distance fleets were close to €30 thousand per fisher FTE, in the small-scale fleet average wage was estimated at a third of this value. The lower average wage in the small-scale fleet may reflect the high incident of owner-operated vessels and possibly, average wages are underestimated and profits overestimated (i.e. including what would be the crew/owner wages).

Table 6 - DCF data on employment and average wage by Member State for 2011

Arrows indicate change (Δ) in relation to 2010: (\nearrow) increase; (\searrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

	Total employed	% of EU total	Δ to 2010	FTE	% of EU total	Δ to 2010	Average wage (FTE)	Δ to 2010	Difference to average EU FTE fisher wages (€)
BEL	377	0%	\searrow	342	0%	\searrow	77,338	\nearrow	55,761
BGR	3,276	3%	\searrow	1,668	2%	\searrow	982	\nearrow	20,595
DEU	1,639	1%	\searrow	1,258	1%	\searrow	34,181	\nearrow	12,605
DNK	1,460	1%	\searrow	1,661	2%	\searrow	68,989	\nearrow	47,413
ESP	36,294	28%	\searrow	32,194	33%	\searrow	20,454	\nearrow	1,123
FIN	1,722	1%	\nearrow	316	0%	\leftrightarrow	26,610	\nearrow	5,033
FRA	10,713	8%	\searrow	7,447	8%	\searrow	54,994	\nearrow	33,417
GBR	12,405	10%	\searrow	7,192	7%	\searrow	31,608	\nearrow	10,031
IRL	4,714	4%	\nearrow	3,166	3%	\nearrow	20,957	\searrow	620
ITA	28,726	22%	\leftrightarrow	20,599	21%	\searrow	13,580	\searrow	7,997
LTU	768	1%	\nearrow	575	1%	\nearrow	9,432	\nearrow	12,144
LVA	712	1%	\searrow	378	0%	\searrow	8,745	\nearrow	12,832
MLT	225	0%	\searrow	155	0%	\searrow	48,981	\nearrow	27,404
NLD	2,763	2%	\searrow	1,768	2%	\searrow	44,287	\nearrow	22,710
POL	2,411	2%	\leftrightarrow	1,576	2%	\leftrightarrow	8,095	\nearrow	13,481
PRT	17,234	13%	\leftrightarrow	17,188	17%	\leftrightarrow	8,986	\nearrow	12,591
ROU	454	0%	\nearrow	28	0%	\searrow	16,184	\nearrow	5,393
SVN	114	0%	\searrow	77	0%	\searrow	20,281	\nearrow	1,296
SWE	1,679	1%	\searrow	974	1%	\searrow	27,990	\leftrightarrow	6,413
EU Total	127,686		\searrow	98,561		\searrow	21,577	\nearrow	

Source: EU Member States 2013 DCF data submissions

Table 7 - DCF data on employment and average wage by main fishing activity and Member State for 2011

Arrows indicate change (Δ) in relation to 2010: (\nearrow) increase; (\searrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

	SMALL SCALE FLEET							LARGE SCALE FLEET							LONG-DISTANT WATER FLEET										
	Total employed	% of EU total	Δ to 2010	FTE	% of EU total	Δ to 2010	Average wage	Δ to 2010	Total employed	% of EU total	Δ to 2010	FTE	% of EU total	Δ to 2010	Average wage	Δ to 2010	Total employed	% of EU total	Δ to 2010	FTE	% of EU total	Δ to 2010	Average wage	Δ to 2010	
BEL	n/a			n/a			n/a		377	0.3%	\searrow	341	0.3%	\searrow	77,565	\nearrow	-			-					
BGR	2,823	2.2%	\searrow	1,423	1.4%	\searrow	621	\nearrow	453	0.4%	\nearrow	245	0.2%	\searrow	3,077	\searrow	-			-					
DEU	869	0.7%	\nearrow	664	0.6%	\nearrow	4,020	\nearrow	770	0.6%	\searrow	594	0.6%	\searrow	67,897	\nearrow	-			-					
DNK	341	0.3%	\nearrow	276	0.3%	\searrow	51,360	\searrow	1,119	0.9%	\searrow	1,385	1.4%	\searrow	72,500	\nearrow	-			-					
ESP	13,453	10.5%	\nearrow	8,356	8.2%	\nearrow	15,213	\searrow	17,803	13.9%	\searrow	18,048	17.6%	\nearrow	21,004	\searrow	5,038	3.9%	\searrow	5,790	5.6%	\searrow	26,302	\nearrow	
FIN	1,589	1.2%	\nearrow	208	0.2%	\searrow	18,280	\nearrow	133	0.1%	\searrow	108	0.1%	\nearrow	42,652	\nearrow	-			-					
FRA	3,973	3.1%	\nearrow	2,647	2.6%	\searrow	41,955	\nearrow	6,302	4.9%	\searrow	4,362	4.3%	\searrow	60,248	\nearrow	438	0.3%	\nearrow	438	0.4%	\nearrow	81,477	\nearrow	
GBR	6,229	4.9%	\leftrightarrow	5,386	5.3%	\nearrow	6,606	\searrow	6,176	4.8%	\searrow	5,892	5.7%	\searrow	32,546	\nearrow	-			-					
IRL	2,333	1.8%	\nearrow	1,311	1.3%	\nearrow	2,732	\searrow	2,381	1.9%	\leftrightarrow	2,117	2.1%	\nearrow	29,650	\nearrow	-			-					
ITA	14,050	11.0%	\leftrightarrow	9,996	9.8%	\leftrightarrow	8,386	\searrow	14,676	11.5%	\searrow	10,603	10.3%	\searrow	18,395	\searrow	-			-					
LTU	128	0.1%	\nearrow	19	0.0%	\nearrow	5,168	\nearrow	257	0.2%	\searrow	187	0.2%	\leftrightarrow	6,477	\nearrow	383	0.3%	\nearrow	368	0.4%	\nearrow	11,157	\nearrow	
LVA	321	0.3%	\searrow	202	0.2%	\searrow	454	\nearrow	391	0.3%	\searrow	176	0.2%	\searrow	18,261	\nearrow	-			-					
MLT	68	0.1%	\searrow	40	0.0%	\searrow	n/a	\nearrow	157	0.1%	\searrow	114	0.1%	\searrow	21,159	\searrow	-			-					
NLD	99	0.1%	\searrow	27	0.0%	\searrow	952	\searrow	2,664	2.1%	\searrow	1,741	1.7%	\searrow	44,948	\leftrightarrow	-			-					
POL	1,163	0.9%	\nearrow	449	0.4%	\nearrow	9,399	\nearrow	978	0.8%	\searrow	857	0.8%	\searrow	9,963	\nearrow	270	0.2%	\leftrightarrow	270	0.3%	\leftrightarrow	-	\searrow	
PRT	9,309	7.3%	\searrow	9,276	9.1%	\leftrightarrow	3,642	\searrow	7,593	5.9%	\nearrow	7,165	7.0%	\nearrow	15,458	\nearrow	332	0.3%	\searrow	332	0.3%	\searrow	17,170	\nearrow	
ROU	434	0.3%	\leftrightarrow	26	0.0%	\searrow	16,391	\nearrow	20	0.0%	\nearrow	3	0.0%	\nearrow	14,042	\nearrow	-			-					
SVN	62	0.0%	\searrow	42	0.0%	\searrow	14,107	\nearrow	52	0.0%	\nearrow	35	0.0%	\nearrow	27,541	\nearrow	-			-					
SWE	925	0.7%	\searrow	367	0.4%	\searrow	26,635	\nearrow	754	0.6%	\searrow	606	0.6%	\leftrightarrow	28,811	\searrow	-			-					
EU Total	58,170	46%	\searrow	40,713	39.7%	\searrow	10,730	\nearrow	63,055	49.4%	\searrow	54,580	53.3%	\searrow	27,243	\nearrow	6,461	5.1%	\searrow	7,199	7.0%	\searrow	27,598	\nearrow	

Source: EU Member States 2013 DCF data submissions

Note: For several MS, data on the long-distance fleet may be missing due to non-submission or aggregation of data for confidentiality reasons. Additionally, DCF criteria may limit data availability on certain fleet segments as each vessel can only be allocated to one fleet segment (fishing gear and vessel length and supra-region combination) based on dominance (more than 50% of fishing time). For more information <http://datacollection.jrc.ec.europa.eu/dcf-fish/eco/dsgr>

5. EU Fishing Activity and Output

The EU fishing fleet¹⁹ spent just over 3.75 million days at sea in 2011, 95% of which were actual fishing days. Italian, French, UK and Portuguese fleets together accounted for 80% of the registered days at sea. The Italian fleet alone, at 47%, accounted for almost half of the EU fleet's sea-days.

Total fuel consumed by the EU fleet²⁰ in 2011 was 1.66 billion litres, a 6% decrease compared to consumption in 2010. The Italian fleet consumed the most fuel, at 25% of total consumption, followed by the French fleet (21%) and UK fleet (16%) (Table 8).

In terms of fuel consumption per day at sea (DAS), the data indicate that on average the EU fleet consumed around 441 litres of fuel per day at sea. Average energy consumption per day at sea in 2011 decreased 5% compared to 2010. The Dutch fleet consumed by far the most amount of fuel at 4.2 thousand litres per day at sea, followed by the Latvian fleet at 2.5 thousand litres and then the Belgian fleet at 2.3 thousand litres per day at sea.

The overall decrease in fuel consumption coincides with an increase in the average price of fuel for the EU fleet (an increase of 28% compared to 2010) and a decrease in days at sea. In 2011, the average price of fuel increased in all MS except Lithuania where fuel consumption actually increased. Fuel consumed per kilogram of fish landed, averaged 0.48 litres in 2011, an increase of 1.8% compared to 2010, and reflects both the decrease in landings volume and the increase in fuel prices.

Table 8 - DCF Effort and fuel consumption data by Member State for 2011

Arrows indicate change (Δ) in relation to 2010: (\uparrow) increase; (\downarrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

	Days at sea (thousand days)	% of EU total	Δ to 2010	Fishing days (thousand days)	% of EU total	Δ to 2010	Energy consumption (thousand litres)	% of EU total	Δ to 2010	Energy consumed per day at sea (litre/day)	Δ to 2010	Fuel consumed per kg landed	% Δ to 2010	Average fuel price (€/litre)	% Δ to 2010
BEL	17.2	0.5%	\downarrow	10.4	0.3%	\downarrow	40,266	2.4%	\downarrow	2,340.8	-10%	2.00	-15%	0.62	32%
BGR	16.1	0.4%	\uparrow	16.1	0.5%	\uparrow	1,065	0.1%	\downarrow	66.0	-33%	0.14	-17%	1.38	23%
DEU	109.3	2.9%	\downarrow	112.7	3.1%	\leftrightarrow	41,600	2.5%	\downarrow	380.4	-7%	0.53	-1%	0.63	28%
DNK	116.0	3.1%	\downarrow	108.5	3.0%	\downarrow	88,049	5.3%	\downarrow	759.3	-4%	0.12	8%	0.60	27%
FIN	148.2	3.9%	\leftrightarrow	147.3	4.1%	\downarrow	14,171	0.9%	\uparrow	95.6	5%	0.12	6%	0.73	30%
FRA	492.8	13.1%	\downarrow	455.3	12.7%	\downarrow	341,597	20.6%	\downarrow	693.2	-2%	0.74	-8%	0.62	24%
GBR	414.5	11.0%	\downarrow	333.0	9.3%	\leftrightarrow	268,137	16.2%	\downarrow	646.9	-4%	0.45	-12%	0.63	34%
IRL	49.5	1.3%	\downarrow	40.5	1.1%	\downarrow	63,777	3.8%	\downarrow	1,288.5	8%	0.32	55%	0.78	31%
ITA	1,748.5	46.5%	\uparrow	1,742.3	48.6%	\uparrow	408,155	24.6%	\uparrow	233.4	-3%	1.92	7%	0.74	25%
LTU	10.3	0.3%	\downarrow	8.1	0.2%	\uparrow	26,373	1.6%	\uparrow	2,564.3	11%	0.23	2%	0.47	-12%
LVA	19.6	0.5%	\downarrow	17.4	0.5%	\downarrow	6,498	0.4%	\leftrightarrow	330.9	121%	0.10	17%	0.64	22%
MLT	41.3	1.1%	\downarrow	54.3	1.5%	\downarrow	2,590	0.2%	\downarrow	62.7	-23%	1.35	-53%	0.85	27%
NLD	46.1	1.2%	\downarrow	36.3	1.0%	\downarrow	193,816	11.7%	\downarrow	4,204.1	0%	0.57	2%	0.54	19%
POL	58.2	1.5%	\leftrightarrow	56.3	1.6%	\uparrow	12,702	0.8%	\uparrow	218.3	2%	0.07	-3%	0.81	30%
PRT	375.1	10.0%	\downarrow	354.7	9.9%	\downarrow	107,295	6.5%	\downarrow	286.1	-14%	0.60	-11%	0.74	35%
ROU	2.9	0.1%	\downarrow	2.6	0.1%	\downarrow	217	0.0%	\uparrow	75.7	141%	0.40	-55%	1.18	18%
SVN	7.6	0.2%	\leftrightarrow	7.6	0.2%	\leftrightarrow	498	0.0%	\uparrow	65.2	3%	0.69	9%	1.24	8%
SWE	83.7	2.2%	\downarrow	83.7	2.3%	\downarrow	40,900	2.5%	\downarrow	488.9	-23%	0.24	-11%	0.67	29%
EU Total / Average	3,756.8		\leftrightarrow	3,587.1		\leftrightarrow	1,657,706.7		\downarrow	441.3	-5%	0.48	2%	0.92	28%

Source: EU Member States 2013 DCF data submissions.

According to Eurostat data, 4,669 thousand tonnes of seafood were landed by the EU fleet in 2011, amounting to an estimated €6.3 billion in value. The leading EU fishing countries were Denmark, the UK and France, which together accounted for over half the landings weight in 2011. Danish fleet landed the most, totalling 20% of the total landed weight, followed by the UK fleet (17%) (Table 9). In terms of landed value, in 2011 the Italian fleet generated the highest value for their catch (22% of the total), followed by France (21%) and then the UK (19%) (Table 10).

The small-scale fleet generated 6.2% of the landings in weight but accounted for almost 15% of the landed value in 2011. The large-scale fleet landed 86.5% in volume and 80.4% in value, indicating lower valued products than those landed by the small-scale fleet. The long-distance fleet accounted for 7.4% of the volume landed and 4.7% of the value. Landings in value increased in all three fleet segments. Yet, while volume of landings decreased in the large-scale fleet, landings increased in the small-scale and long-distance fleet segments compared to 2010 (Table 11 and Table 12).

¹⁹ Excludes data from Cyprus, Estonia, Greece and Spain which were not reported

²⁰ excludes data for Cyprus, Estonia, Greece and Spain which were not reported

Table 9 - DCF Landings in weight (tonnes) by Member State: 2008-2011

Development trend based on the % change (%Δ) of the net profit margin in 2011 to the average net profit margin in 2008-2010. Arrows indicate change (Δ) in relation to the average 2008-2010: (↗) increase; (↘) decrease and (↔) stable/no change (Δ between -1 and +1%).

Landings weight (tonnes)									
	2008	%of EU total	2009	%of EU total	2010	%of EU total	2011	%of EU total	Development trend
BEL	20,007	0.6%	18,989	0.5%	19,767	0.5%	20,138	0.6%	2.8% ↗
BGR	7,514	0.2%	7,113	0.2%	9,276	0.2%	7,600	0.2%	-4.6% ↘
DEU	110,241	3.1%	113,697	3.0%	87,337	2.3%	78,085	2.3%	-24.7% ↘
DNK	690,466	19.5%	773,029	20.7%	822,291	22.0%	710,977	20.5%	-6.7% ↘
FIN	111,481	3.2%	117,541	3.2%	122,100	3.3%	119,684	3.5%	2.3% ↗
FRA	433,855	12.3%	431,419	11.6%	447,431	12.0%	463,702	13.4%	6.0% ↗
GBR	559,454	15.8%	562,175	15.1%	553,933	14.8%	597,357	17.3%	7.0% ↗
IRL	198,004	5.6%	262,562	7.0%	314,203	8.4%	199,483	5.8%	-22.8% ↘
ITA	227,011	6.4%	242,437	6.5%	224,758	6.0%	212,369	6.1%	-8.2% ↘
LTU	176,082	5.0%	209,146	5.6%	108,620	2.9%	114,681	3.3%	-30.3% ↘
LVA	86,470	2.4%	78,464	2.1%	74,017	2.0%	63,120	1.8%	-20.8% ↘
MLT	1,281	0.0%	1,587	0.0%	1,836	0.0%	1,920	0.1%	22.4% ↗
NLD	388,519	11.0%	335,413	9.0%	381,639	10.2%	339,421	9.8%	-7.9% ↘
POL	126,150	3.6%	212,126	5.7%	170,771	4.6%	179,906	5.2%	6.0% ↗
PRT	185,879	5.3%	161,579	4.3%	189,292	5.1%	178,841	5.2%	-0.04% ↔
ROU	445	0.0%	289	0.0%	231	0.0%	537	0.0%	67.1% ↗
SVN	686	0.0%	866	0.0%	764	0.0%	719	0.0%	-6.8% ↘
SWE	214,072	6.1%	199,373	5.3%	204,441	5.5%	173,401	5.0%	-15.8% ↘
EU Total	3,537,616		3,727,805		3,732,707		3,461,941		-5.6% ↘

Source: EU Member States 2013 DCF data submissions

Table 10 - DCF landings in value (thousand €) by Member State: 2008-2011

Development trend based on the % change (%Δ) of the net profit margin in 2011 to the average net profit margin in 2008-2010. Arrows indicate change (Δ) in relation to the average 2008-2010: (↗) increase; (↘) decrease and (↔) stable/no change (Δ between -1 and +1%).

Landings value (thousand €)									
	2008	%of EU total	2009	%of EU total	2010	%of EU total	2011	%of EU total	Development trend
BEL	76,263	1.7%	67,961	1.6%	76,242	1.7%	79,437	1.6%	8.1% ↗
BGR	3,137	0.1%	2,785	0.1%	2,260	0.0%	2,698	0.1%	-1.1% ↘
DEU	153,876	3.4%	123,389	2.8%	136,985	3.0%	125,470	2.6%	-9.1% ↘
DNK	334,494	7.3%	285,774	6.6%	384,254	8.4%	412,842	8.4%	23.3% ↗
FIN	23,105	0.5%	23,815	0.5%	26,645	0.6%	32,508	0.7%	32.6% ↗
FRA	903,791	19.8%	876,352	20.2%	924,296	20.2%	1,050,706	21.5%	16.6% ↗
GBR	766,966	16.8%	736,093	17.0%	794,389	17.3%	948,709	19.4%	23.9% ↗
IRL	196,489	4.3%	185,934	4.3%	202,111	4.4%	200,276	4.1%	2.8% ↗
ITA	1,105,644	24.2%	1,202,010	27.7%	1,114,860	24.3%	1,101,033	22.5%	-3.5% ↘
LTU	84,305	1.8%	36,218	0.8%	46,902	1.0%	65,581	1.3%	17.5% ↗
LVA	23,144	0.5%	17,454	0.4%	21,036	0.5%	21,775	0.4%	6.0% ↗
MLT	8,170	0.2%	8,554	0.2%	8,841	0.2%	11,370	0.2%	33.4% ↗
NLD	365,798	8.0%	319,730	7.4%	354,679	7.7%	326,600	6.7%	-5.8% ↘
POL	34,756	0.8%	37,277	0.9%	39,957	0.9%	46,046	0.9%	23.3% ↗
PRT	369,136	8.1%	309,092	7.1%	347,274	7.6%	344,187	7.0%	0.7% ↔
ROU	725	0.0%	587	0.0%	485	0.0%	1,422	0.0%	137.3% ↗
SVN	2,078	0.0%	2,171	0.1%	1,993	0.0%	2,049	0.0%	-1.5% ↘
SWE	114,390	2.5%	100,367	2.3%	103,350	2.3%	116,531	2.4%	9.9% ↗
EU Total	4,566,267		4,335,563		4,586,559		4,889,239		8.7% ↗

Source: EU Member States 2013 DCF data submissions

Table 11 - Landings in weight (tonnes) by main fishing activity and Member State: 2011, (thousand tonnes)

Arrows indicate change (Δ) in relation to 2010: (\uparrow) increase; (\downarrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

	SMALL SCALE FLEET			LARGE SCALE FLEET			LONG-DISTANT WATER FLEET		
	Landings weight	% of EU total	Δ to 2010	Landings weight	% of EU total	Δ to 2010	Landings weight	% of EU total	Δ to 2010
BEL	-			20,137,720	0.6%	\uparrow	-		
BGR	2,323,260	0.1%	\downarrow	5,277,209	0.2%	\downarrow	-		
DEU	6,512,509	0.2%	\downarrow	71,572,690	2.1%	\downarrow	-		
DNK	10,962,780	0.3%	\downarrow	699,982,172	20.2%	\downarrow	-		
FIN	10,098,982	0.3%	\leftrightarrow	109,584,809	3.2%	\downarrow	-		
FRA	64,273,086	1.9%	\uparrow	317,336,107	9.2%	\uparrow	82,092,626	2.4%	\downarrow
GBR	38,806,217	1.1%	\uparrow	558,550,596	16.1%	\uparrow	-		
IRL	4,672,081	0.1%	\downarrow	194,810,904	5.6%	\downarrow	-		
ITA	36,716,222	1.1%	\uparrow	173,607,528	5.0%	\downarrow	2,045,675		
LTU	269,896	0.0%	\uparrow	18,216,707	0.5%	\uparrow	96,193,975	2.8%	\uparrow
LVA	3,326,510	0.1%	\uparrow	59,793,278	1.7%	\downarrow	-		
MLT	825,108	0.0%	\uparrow	1,094,751	0.0%	\uparrow	-		
NLD	627,484	0.0%	\downarrow	338,793,526	9.8%	\downarrow	-		
POL	11,417,923	0.3%	\uparrow	104,598,159	3.0%	\leftrightarrow	63,889,490	1.8%	\uparrow
PRT	10,308,063	0.3%	\downarrow	153,305,304	4.4%	\downarrow	15,227,704	0.4%	\uparrow
ROU	413,341	0.0%	\uparrow	123,847	0.004%	\uparrow	-		
SVN	54,862	0.0%	\uparrow	664,063	0.0%	\downarrow	-		
SWE	5,275,681	0.2%	\downarrow	168,125,544	4.9%	\downarrow	-		
EU Total	206,884,005	6.0%	\uparrow	2,995,574,914	86.5%	\downarrow	259,449,470	7.5%	\uparrow

Source: EU Member States 2013 DCF data submissions.

Table 12 - Landings in value (thousand €) by main fishing activity and Member State: 2011 (thousand €)

Arrows indicate change (Δ) in relation to 2010: (\uparrow) increase; (\downarrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

	SMALL SCALE FLEET			LARGE SCALE FLEET			LONG-DISTANT WATER FLEET		
	Landings value	% of EU total	Δ to 2010	Landings value	% of EU total	Δ to 2010	Landings value	% of EU total	Δ to 2010
BEL	-			79,437	1.6%	\uparrow	-		
BGR	548	0.01%	\downarrow	2,150	0.0%	\uparrow	-		
DEU	7,453	0.15%	\downarrow	118,017	2.4%	\downarrow	-		
DNK	25,030	0.51%	\uparrow	387,812	7.9%	\uparrow	-		
FIN	10,739	0.22%	\uparrow	21,768	0.4%	\uparrow	-		
FRA	190,700	3.90%	\uparrow	745,681	15.3%	\uparrow	114,325	2.3%	\uparrow
GBR	103,554	2.12%	\uparrow	845,155	17.3%	\uparrow	-		
IRL	6,849	0.14%	\downarrow	193,427	4.0%	\leftrightarrow	-		
ITA	297,235	6.08%	\uparrow	793,092	16.2%	\downarrow	10,705	0.2%	\downarrow
LTU	197	0.00%	\uparrow	6,484	0.1%	\uparrow	58,900	1.2%	\uparrow
LVA	1,220	0.02%	\downarrow	20,555	0.4%	\uparrow	-		
MLT	4,330	0.09%	\uparrow	7,039	0.1%	\uparrow	-		
NLD	4,665	0.10%	\downarrow	321,935	6.6%	\downarrow	-		
POL	10,925	0.22%	\uparrow	35,120	0.7%	\uparrow	-		
PRT	44,598	0.91%	\downarrow	255,092	5.2%	\uparrow	44,496	0.9%	\uparrow
ROU	1,315	0.03%	\uparrow	106	0.0%	\uparrow	-		
SVN	482	0.01%	\uparrow	1,567	0.0%	\uparrow	-		
SWE	13,819	0.28%	\uparrow	102,713	2.1%	\uparrow	-		
EU Total	723,661	14.8%	\uparrow	3,937,151	80.5%	\uparrow	228,427	4.7%	\uparrow

Source: EU Member States 2013 DCF data submissions.

6. EU Fleet Economic Performance Indicators

Income and Expenditure

According to DCF data, the EU fishing fleet (excluding Cyprus, Estonia and Greece) generated an income²¹ of €7.13 billion in 2011, while operating costs amounted to €5.8 billion. Total costs, including capital costs but excluding fishing right costs, amounted to €6.7 billion in 2011, equating to around 94% of income.

EU fleet income increased by 7.6% between 2010 and 2011 and consisted of €7 billion in fish sales and €131 million in non-fishing income (excluding Cyprus, Estonia and Greece) (Table 13).

Total costs increased around 6% in 2011 compared to 2010. The main cost items included labour costs (€1.9 billion in crew wages and €257 million in unpaid labour) amounting to 32% of total operating costs, and energy costs (€1.5 billion), totalling 23% of operating costs. Capital costs were estimated at €877 million (€776 million in depreciation costs and €101 million in opportunity costs of capital). All costs items increased in 2011: labour costs by 3% and repair and maintenance by 8%. Expenditure on fuel increased by a further 20% in 2011 compared to 2010 and this trend is expected to continue as fuel prices continued to rise in 2012 (Table 14).

Table 13 EU fleet income by Member State for 2011, (thousand €)

Arrows indicate change (Δ) in relation to 2010: (↗) increase; (↘) decrease and (↔) stable/no change (Δ between -1 and +1%).

	Landings income	%of EU total	Δ to 2010	Other income	%of EU total	Δ to 2010	Total Income ¹	%of EU total	Δ to 2010
BEL	79,437	1.1%	↗	2,908	2.2%	↘	82,346	1.2%	↗
BGR	2,698	0.0%	↗				2,698	0.04%	↘
DEU	125,873	1.8%	↘	3,758	2.9%	↘	129,631	1.8%	↘
DNK	385,862	5.5%	↔	8,641	6.6%	↘	394,504	5.5%	↘
ESP	1,947,108	27.8%	↗	34,947	26.7%	↗	1,982,055	27.8%	↗
FIN	33,039	0.5%	↗	2,495	1.9%	↘	35,535	0.5%	↗
FRA	1,136,904	16.2%	↗	19,463	14.9%	↘	1,156,367	16.2%	↗
GBR	948,659	13.5%	↗	23,120	17.6%	↗	971,778	13.6%	↗
IRL	239,585	3.4%	↗	6,738	5.1%	↗	246,323	3.5%	↗
ITA	1,101,033	15.7%	↘				1,101,033	15.4%	↘
LTU	46,532	0.7%	↗	428	0.3%	↘	46,960	0.7%	↗
LVA	21,775	0.3%	↗	845	0.6%	↗	22,620	0.3%	↗
MLT	11,371	0.2%	↗				11,371	0.2%	↗
NLD	326,600	4.7%	↘	1,008	0.8%	↗	327,608	4.6%	↘
POL	46,046	0.7%	↗	368	0.3%	↗	46,414	0.7%	↗
PRT	430,968	6.2%	↗	11,415	8.7%	↘	442,383	6.2%	↗
ROU	1,422	0.0%	↗				1,422	0.02%	↗
SVN	2,049	0.0%	↗	633	0.5%	↗	2,682	0.04%	↗
SWE	116,241	1.7%	↗	14,260	10.9%	↘	130,501	1.8%	↘
EU Total	7,003,204		↗	131,027		↘	7,134,231		↗

Source: EU Member States 2013 DCF data submissions.

¹Total income excludes direct income subsidies and income from fishing rights but may include indirect subsidies such as fuel tax concessions

²¹ Includes income from fishing and other income. Excludes income from leasing out fishing rights and direct income subsidies but may include indirect subsidies, such as fuel tax concessions.

Table 14 EU fleet cost structure by Member State for 2011, (thousand €)

Arrows indicate change (Δ) in relation to 2010: (↗) increase; (↘) decrease and (↔) stable/no change (Δ between -1 and +1%).

	Wages and salaries of crew	% of EU total	Δ to 2010	Unpaid labour value	% of EU total	Δ to 2010	Energy costs	% of EU total	Δ to 2010	Repair costs	% of EU total	Δ to 2010	Other variable costs	% of EU total	Δ to 2010	Non-variable costs	% of EU total	Δ to 2010	Annual depreciation costs	% of EU total	Δ to 2010
BEL	24,184	1.3%	↗	2,265	0.9%	↗	24,769	1.6%	↗	4,863	0.9%	↘	10,366	1.0%	↗	6,446	1.1%	↘	8,626	1.1%	↔
BGR	1,489	0.1%	↘	149	0.1%	↘	1,470	0.1%	↘	589	0.1%	↘	1,881	0.2%	↘	257	0.0%	↘	118	0.0%	↘
DEU	34,726	1.9%	↘	8,274	3.2%	↘	26,039	1.7%	↗	18,510	3.2%	↔	10,886	1.1%	↗	16,436	2.7%	↗	21,047	2.7%	↘
DNK	75,398	4.0%	↘	39,198	15.3%	↘	53,235	3.5%	↗	40,904	7.2%	↗	30,702	3.0%	↘	20,535	3.4%	↘	88,615	11.4%	↗
ESP	551,243	29.5%	↗	107,261	41.8%	↘	439,704	28.7%	↗	143,809	25.2%	↗	422,846	41.5%	↗	136,739	22.8%	↗	150,087	19.3%	↗
FIN	3,917	0.2%	↗	4,492	1.8%	↗	10,287	0.7%	↗	4,797	0.8%	↗	2,951	0.3%	↗	5,217	0.9%	↗	4,742	0.6%	↗
FRA	409,542	21.9%	↗	-	-	-	212,514	13.9%	↗	87,942	15.4%	↗	125,542	12.3%	↗	139,603	23.3%	↘	61,067	7.9%	↔
GBR	217,641	11.6%	↗	9,683	3.8%	↘	169,253	11.1%	↗	86,461	15.1%	↗	164,731	16.1%	↗	121,797	20.4%	↗	52,752	6.8%	↘
IRL	62,262	3.3%	↗	4,081	1.6%	↗	49,777	3.3%	↗	29,701	5.2%	↗	17,193	1.7%	↘	38,095	6.4%	↗	29,017	3.7%	↗
ITA	227,552	12.2%	↘	52,185	20.3%	↔	302,035	19.7%	↗	44,589	7.8%	↘	130,896	12.8%	↘	40,630	6.8%	↘	201,071	25.9%	↗
LTU	5,392	0.3%	↗	27	0.0%	↗	12,293	0.8%	↘	6,085	1.1%	↗	12,679	1.2%	↘	3,019	0.5%	↘	2,252	0.3%	↔
LVA	3,284	0.2%	↗	21	0.0%	↘	4,165	0.3%	↗	922	0.2%	↗	2,625	0.3%	↗	4,212	0.7%	↗	990	0.1%	↘
MLT	1,526	0.1%	↘	6,066	2.4%	↘	2,195	0.1%	↘	841	0.1%	↘	2,068	0.2%	↘	150	0.0%	↘	19,167	2.5%	↗
NLD	73,317	3.9%	↘	4,972	1.9%	↘	105,121	6.9%	↗	47,317	8.3%	↘	29,155	2.9%	↘	36,948	6.2%	↘	26,135	3.4%	↘
POL	11,717	0.6%	↗	1,041	0.4%	-	10,290	0.7%	↗	5,461	1.0%	↗	4,687	0.5%	↗	4,450	0.7%	↗	2,137	0.3%	↗
PRT	152,834	8.2%	↗	1,620	0.6%	↘	79,533	5.2%	↗	27,485	4.8%	↗	37,048	3.6%	↘	14,700	2.5%	↘	77,262	10.0%	↗
ROU	460	0.02%	↗	-	-	-	256	0.02%	↗	80	0.01%	↗	223	0.02%	↗	-	-	-	104	0.01%	↗
SVN	1,179	0.1%	↗	382	0.1%	↗	617	0.04%	↗	266	0.05%	↘	206	0.02%	↘	22	0.0%	↘	272	0.04%	↗
SWE	12,324	0.7%	↘	14,927	5.8%	↗	27,583	1.8%	↘	20,566	3.6%	↘	13,325	1.3%	↗	9,237	1.5%	↘	30,419	3.9%	↗
EU Total	1,869,987		↗	256,646		↘	1,531,135		↗	571,189		↗	1,020,011		↗	598,493		↗	775,880		↗

Source: EU Member States 2013 DCF data submissions

Economic Performance Indicators

The profitability indicators estimated²² - Gross Value Added (GVA), gross profit and net profit generated by the EU fishing fleet (excluding Cyprus, Greece and Estonia) in 2011 - showed improvements from 2010 results (Table 15).

The amount of GVA generated by the EU fishing fleet (excluding Cyprus, Greece and Estonia) in 2011 was €3.4 billion, a 4% increase from 2010. As a proportion of income, GVA increased from 48% in 2008 to 53% in 2009, falling to 49.5% in 2010 and 47.8% in 2011.

Gross profit, calculated as income minus operating costs, generated by the EU fleet in 2011 was almost €1.3 billion, a 8% increase from 2010. Gross profit as a proportion of total income increased from 15% in 2008 to 19% in 2009, falling to 18% in 2010 and 2011.

Net profit, calculated as income minus operating costs and capital costs, generated by the EU fleet in 2011 was €410 million, an increase of 28% compared to 2010. Net profit as a proportion of income increased steadily from 1% in 2008 to 6% in 2011.

Table 15 Economic performance indicators for the EU fishing fleet: 2011 (thousand €)

Arrows indicate change (Δ) in relation to 2010: (\uparrow) increase; (\downarrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

	Fleet income	%of EU total	Δ to 2010	GVA	%of EU total	Δ to 2010	Gross profit	%of EU total	Δ to 2010	Net profit	%of EU total	Δ to 2010
BEL	82,346	1.2%	\uparrow	35,901	1.1%	\leftrightarrow	9,452	0.7%	\downarrow	463	0.1%	\downarrow
BGR	2,698	0.0%	\downarrow	1,499	0.0%	\uparrow	3,137	-0.2%	\uparrow	3,257	-0.8%	\uparrow
DEU	129,631	1.8%	\downarrow	57,759	1.7%	\downarrow	14,759	1.1%	\downarrow	6,393	-1.6%	\downarrow
DNK	394,504	5.5%	\downarrow	249,128	7.3%	\downarrow	134,532	10.5%	\downarrow	45,798	11.2%	\downarrow
ESP	1,982,055	27.8%	\uparrow	838,957	24.6%	\uparrow	180,453	14.0%	\uparrow	18,642	4.5%	\uparrow
FIN	35,535	0.5%	\uparrow	12,283	0.4%	\leftrightarrow	3,874	0.3%	\downarrow	673	-0.2%	\downarrow
FRA	1,156,367	16.2%	\uparrow	590,766	17.3%	\uparrow	181,224	14.1%	\uparrow	107,189	26.1%	\uparrow
GBR	971,778	13.6%	\uparrow	429,535	12.6%	\uparrow	202,211	15.7%	\uparrow	157,654	38.4%	\uparrow
IRL	246,323	3.5%	\uparrow	111,557	3.3%	\downarrow	45,214	3.5%	\downarrow	14,300	-3.5%	\downarrow
ITA	1,101,033	15.4%	\downarrow	582,883	17.1%	\downarrow	303,147	23.6%	\downarrow	79,596	19.4%	\downarrow
LTU	46,960	0.7%	\uparrow	12,884	0.4%	\uparrow	7,465	0.6%	\uparrow	4,671	1.1%	\uparrow
LVA	22,620	0.3%	\uparrow	10,696	0.3%	\downarrow	7,390	0.6%	\downarrow	6,242	1.5%	\uparrow
MLT	11,371	0.2%	\uparrow	6,118	0.2%	\uparrow	1,474	-0.1%	\uparrow	22,226	-5.4%	\leftrightarrow
NLD	327,608	4.6%	\downarrow	109,067	3.2%	\downarrow	30,778	2.4%	\downarrow	3,000	0.7%	\uparrow
POL	46,414	0.7%	\uparrow	21,526	0.6%	\downarrow	8,767	0.7%	\downarrow	4,817	1.2%	\downarrow
PRT	442,383	6.2%	\uparrow	283,617	8.3%	\uparrow	129,163	10.0%	\uparrow	28,956	7.1%	\uparrow
ROU	1,422	0.0%	\uparrow	862	0.0%	\uparrow	401	0.0%	\uparrow	243	0.1%	
SVN	2,682	0.0%	\uparrow	1,571	0.0%	\uparrow	10	0.0%	\uparrow	388	-0.1%	\uparrow
SWE	130,501	1.8%	\downarrow	59,791	1.8%	\downarrow	32,540	2.5%	\downarrow	161	0.0%	\downarrow
EU Total	7,134,231		\uparrow	3,413,403		\uparrow	1,286,770		\uparrow	410,195		\uparrow

Source: EU Member States 2013 DCF data submissions

The EU large-scale fleet generated 71% of the EU fleet's income, with the small-scale and long-distance fleets each contributing around 15%.

The large-scale fleet generated 71% of the total GVA produced by the EU fleet in 2011, 72% of the gross profit and almost 65% of the net profit, a decrease from 89% in 2010.

The small-scale fleet contributed to almost 19% of the GVA, 16% of the gross profit and 20% of the net profit in 2011. Net profit generated by the small-scale fleet increased almost 32% while the large-scale fleet decreased by 5% compared to 2010. The long-distance fleet moved from a loss making position in 2010 to post a profit in 2011 (see Table 1).

In relative terms, the small-scale fleet generated the highest GVA, gross profit and net profit as a percentage of income, 61%, 20% and 8% respectively. The large-scale and long-distance fleets each generated a profit margin of around 5.5% in 2011 (see Table 2).

²² All indicators were estimated excluding direct income subsidies and income and costs related to fishing rights

Analysis of economic performance in 2011 by Member State revealed a mixed picture. The data suggests that 13 out of 19 Member States generated a net profit in 2011 and six Member States (Bulgaria, Ireland, Finland, Germany, Malta and Slovenia) generated net losses in 2011.

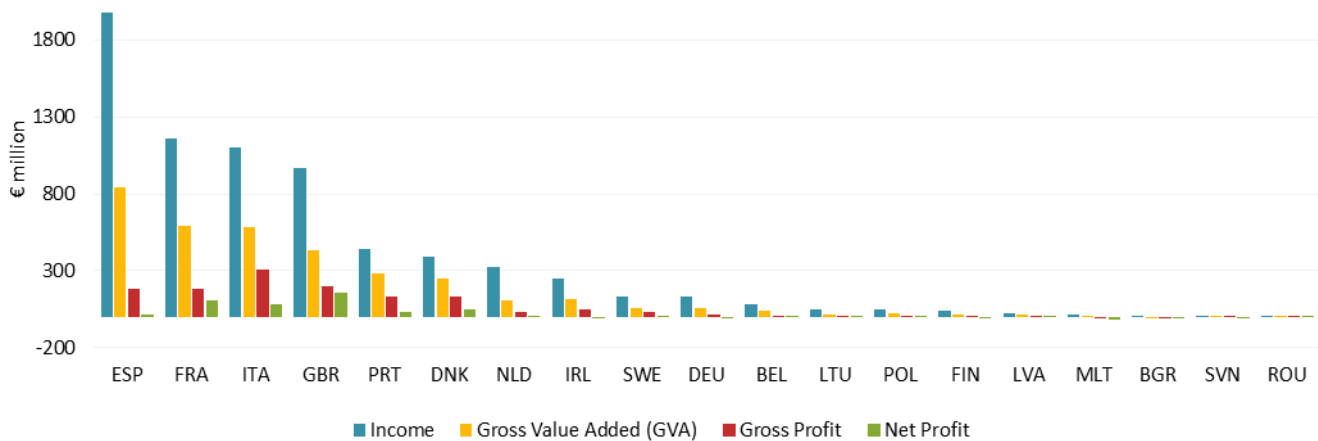
The Spanish fleet generated the highest GVA in absolute terms (25% of the EU total), followed by the French and Italian fleets, each with 17% of the EU total (Figure 2). In relative terms, the Portuguese fleet generated the highest level of GVA in relation to income (64%), followed by the Danish fleet (63%) and the Romanian fleet (61%) (Figure 3).

The Italian fleet generated the highest gross profit in absolute terms in 2011 (24% of the EU total) followed by the UK fleet (16% of the EU total) and the French fleet (14% of the EU total). In relative terms, the Danish fleet generated the highest level of gross profit in relation to income (34%), followed by the Latvian fleet (33%) and the Portuguese fleet (29%).

The UK fleet generated the highest net profit in absolute terms in 2011 (38% of the EU total) followed by the French fleet (26% of the EU total) and the Italian fleet (19% of the EU total). In relative terms, the Latvian fleet generated the highest level of net profit in relation to income (28%), followed by the Romanian fleet (17%) and the UK fleet (16%).

Data for Bulgaria, Malta and Slovenia were inconsistent and partially excluded from analysis.

The main economic profitability indicators – Income from landings, Gross Value Added (GVA), gross profit and net profit (all excluding subsidies and fishing rights) - generated by the EU small-scale, large-scale and long-distance fleets are presented in Tables 16 to 18.



Source: EU Member States 2013 DCF data submissions

Figure 2 - EU Member States performance indicators as a percentage of total income in 2010



Source: EU Member States 2013 DCF data submissions

Figure 3 - EU Member States performance indicators as a percentage of total income in 2010

Table 16 Economic performance indicators for the EU small-scale fleet: 2011 (thousand €)

Arrows indicate change (Δ) in relation to 2010: (\nearrow) increase; (\searrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

EU SMALL SCALE FLEET												
	Landings Income	% of EU total	Δ to 2010	GVA	% of EU total	Δ to 2010	Gross profit	% of EU total	Δ to 2010	Net profit	% of EU total	Δ to 2010
BGR	604,553	0.0%	\searrow	547	0.0%	\searrow	1,431	-0.1%	\searrow	1,515	-0.4%	\nearrow
DEU	7,329	0.1%	\searrow	2,930	0.0%	\searrow	261	0.0%	\searrow	1,404	-0.3%	\nearrow
DNK	23,701	0.3%	\nearrow	12,339	0.2%	\searrow	1,827	-0.1%	\nearrow	5,996	-1.5%	\leftrightarrow
ESP	162,894	2.3%	\searrow	111,889	1.6%	\searrow	15,231	-1.2%	\nearrow	23,569	-5.7%	\nearrow
FIN	10,445	0.1%	\nearrow	4,532	0.1%	\searrow	729	0.1%	\searrow	631	-0.2%	\searrow
FRA	247,399	3.5%	\nearrow	163,180	2.3%	\nearrow	52,125	4.1%	\nearrow	36,922	9.0%	\nearrow
GBR	104,557	1.5%	\nearrow	50,851	0.7%	\searrow	15,276	1.2%	\nearrow	9,639	2.3%	\nearrow
IRL	54,852	0.8%	\nearrow	31,238	0.4%	\searrow	27,658	2.1%	\nearrow	22,518	5.5%	n/a
ITA	297,235	4.2%	\nearrow	185,484	2.6%	\leftrightarrow	101,662	7.9%	\nearrow	53,423	13.0%	\leftrightarrow
LTU	200	0.0%	\nearrow	138	0.0%	\nearrow	43	0.0%	\nearrow	34	0.0%	\searrow
LVA	1,220	0.0%	\searrow	1,165	0.0%	\nearrow	1,073	0.1%	\nearrow	1,032	0.3%	\searrow
MLT	4,334	0.1%	\nearrow	2,049	0.0%	\nearrow	3,123	-0.2%	\searrow	5,624	-1.4%	\searrow
NLD	4,665	0.1%	\searrow	4,399	0.1%	\nearrow	4,373	0.3%	\searrow	4,325	1.1%	\searrow
POL	10,925	0.2%	\nearrow	7,323	0.1%	\nearrow	3,102	0.2%	\nearrow	2,276	0.6%	\nearrow
PRT	73,575	1.1%	\searrow	54,600	0.8%	\searrow	20,820	1.6%	\searrow	3,451	-0.8%	\searrow
ROU	1,315	0.0%	\nearrow	815	0.0%	\nearrow	390	0.0%	\nearrow	280	0.1%	n/a
SVN	482	0.0%	\nearrow	856	0.0%	\nearrow	269	0.0%	\searrow	77	0.0%	\searrow
SWE	13,467	0.2%	\nearrow	9,718	0.1%	\nearrow	64	0.0%	\searrow	5,167	-1.3%	\searrow
EU Total	1,019,201	14.6%	\nearrow	642,959	18.8%	\leftrightarrow	206,104	16.0%	\searrow	83,170	20.3%	\nearrow

Source: EU Member States 2013 DCF data submissions

Table 17 Economic performance indicators for the EU large-scale fleet: 2011 (thousand €)

Arrows indicate change (Δ) in relation to 2010: (\nearrow) increase; (\searrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%).

EU LARGE SCALE FLEET												
	Landings Income	% of EU total	Δ to 2010	GVA	% of EU total	Δ to 2010	Gross profit	% of EU total	Δ to 2010	Net profit	% of EU total	Δ to 2010
BEL	79,437.3	1.1%	\nearrow	35,901.3	1.1%	\leftrightarrow	9,451.8	0.7%	\searrow	463.5	0.1%	\searrow
BGR	2,093.8	0.0%	\searrow	951.7	0.0%	\searrow	1,705.5	-0.1%	\searrow	1,742.0	-0.4%	\searrow
DEU	118,544.6	1.7%	\searrow	54,829.1	1.6%	\searrow	14,498.1	1.1%	\searrow	4,989.5	-1.2%	\searrow
DNK	362,160.9	5.2%	\leftrightarrow	236,788.1	6.9%	\searrow	136,358.8	10.6%	\searrow	51,793.9	12.6%	\searrow
ESP	1,010,002.7	14.4%	\nearrow	471,235.0	13.8%	\nearrow	92,148.9	7.2%	\nearrow	8,369.2	-2.0%	\nearrow
FIN	22,594.9	0.3%	\nearrow	7,751.4	0.2%	\nearrow	3,144.9	0.2%	\searrow	42.30	0.0%	\searrow
FRA	767,669.3	11.0%	\nearrow	371,571.3	10.9%	\nearrow	108,771.5	8.5%	\nearrow	70,266.9	17.1%	\nearrow
GBR	844,101.2	12.1%	\nearrow	378,684.3	11.1%	\nearrow	186,934.4	14.5%	\nearrow	148,014.8	36.1%	\nearrow
IRL	184,733.5	2.6%	\nearrow	80,319.4	2.4%	\searrow	17,556.2	1.4%	\searrow	36,818.0	-9.0%	\nearrow
ITA	793,092.3	11.3%	\searrow	388,914.8	11.4%	\searrow	193,874.6	15.1%	\searrow	26,534.0	6.5%	\searrow
LTU	7,375.7	0.1%	\nearrow	2,750.0	0.1%	\nearrow	1,536.9	0.1%	\nearrow	1,154.2	0.3%	\nearrow
LVA	20,554.7	0.3%	\nearrow	9,530.7	0.3%	\searrow	6,316.8	0.5%	\searrow	5,209.9	1.3%	\nearrow
MLT	7,036.7	0.1%	\nearrow	4,069.0	0.1%	\nearrow	1,649.2	0.1%	\searrow	16,602.2	-4.0%	\nearrow
NLD	280,120.1	4.0%	\searrow	104,668.5	3.1%	\searrow	26,404.7	2.1%	\searrow	1,325.1	-0.3%	\nearrow
POL	35,120.3	0.5%	\nearrow	14,203.2	0.4%	\searrow	5,664.9	0.4%	\searrow	2,541.4	0.6%	\searrow
PRT	316,357.2	4.5%	\nearrow	209,394.4	6.1%	\nearrow	94,421.3	7.3%	\nearrow	27,285.9	6.7%	\nearrow
ROU	106.4	0.0%	\nearrow	46.7	0.0%	\nearrow	11.6	0.0%	\nearrow	37.17	-0.01%	n/a
SVN	1,567.4	0.0%	\nearrow	715.8	0.0%	\nearrow	258.3	0.0%	\searrow	464.9	-0.1%	\searrow
SWE	102,773.7	1.5%	\nearrow	50,072.7	1.5%	\searrow	32,604.0	2.5%	\searrow	5,328.0	1.3%	\searrow
EU Total	4,955,442.8	70.8%	\nearrow	2,420,494.2	70.9%	\nearrow	929,384.8	72.2%	\leftrightarrow	268,202.3	65.4%	\searrow

Source: EU Member States 2013 DCF data submissions.

Table 18 Economic performance indicators for the EU long-distance fleet: 2011 (thousand €)

Arrows indicate change (Δ) in relation to 2010: (↗) increase; (↘) decrease and (↔) stable/no change (Δ between -1 and +1%).

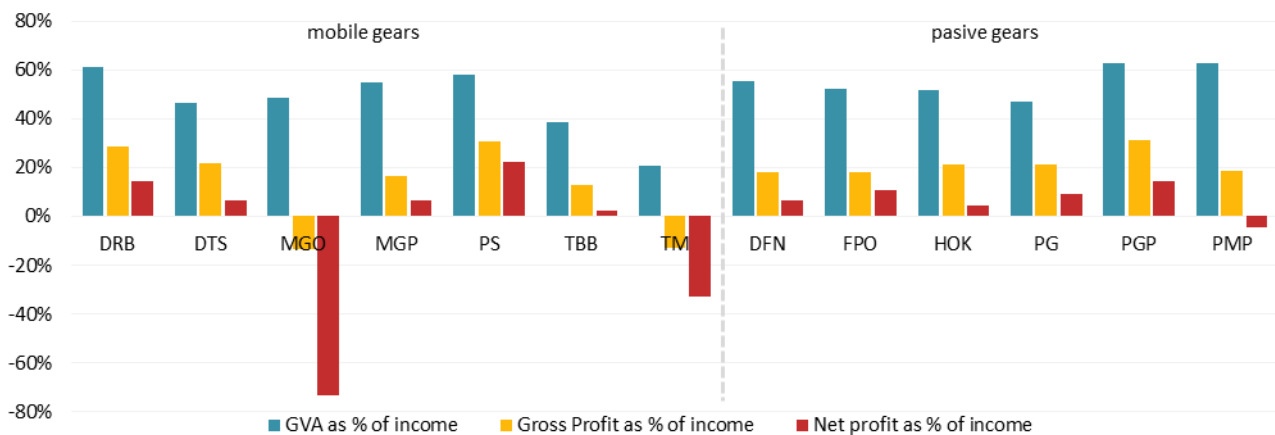
EU LONG DISTANT WATER FLEET												
	Landings Income	% of EU total	Δ to 2010	GVA	% of EU total	Δ to 2010	Gross profit	% of EU total	Δ to 2010	Net profit	% of EU total	Δ to 2010
ESP	774,211.3	11.1%	↗	255,833.0	7.5%	↗	103,534.9	8.0%	↗	50,579.8	12.3%	↗
FRA	121,836.1	1.7%	↗	56,015.1	1.6%	↗	20,328.1	1.6%	↗	-	-	-
ITA	10,705.4	0.2%	↘	8,483.8	0.2%	↘	7,610.4	0.6%	↘	361.3	-0.1%	↘
LTU	38,956.6	0.6%	↗	9,995.9	0.3%	↗	5,885.7	0.5%	↘	3,483.3	0.8%	↗
NLD	41,814.6	0.6%	↗	-	-	-	-	-	-	-	-	-
PRT	41,035.9	0.6%	↗	19,622.2	0.6%	↗	13,921.9	1.1%	↗	5,120.6	1.2%	↗
EU Total	1,028,559.9	14.7%	↗	349,950.0	10.3%	↗	151,281.0	11.8%	↗	58,822.4	14.3%	↗

Source: EU Member States 2013 DCF data submissions

Between 2008 and 2011, the static gear segments were generally more profitable than the mobile gear segments.

GVA, gross profit and net profit as a proportion of total income were consistently higher for the static gears over the period. GVA as a proportion of income varied between 53%-64% for the static gears, compared to 21%-62% for the mobile gears.

Gross profit fluctuated between 18%-31% for static gears, while mobile gears fluctuated between -13% and 31%. The static gears generally produced net profits for the years 2008 to 2011, while mobile gears made net losses in 2008 and 2009 (Figure 4). The poor performance of the mobile gear segment is mainly attributed to the pelagic trawlers (TM) and other active gear segment (MGO).



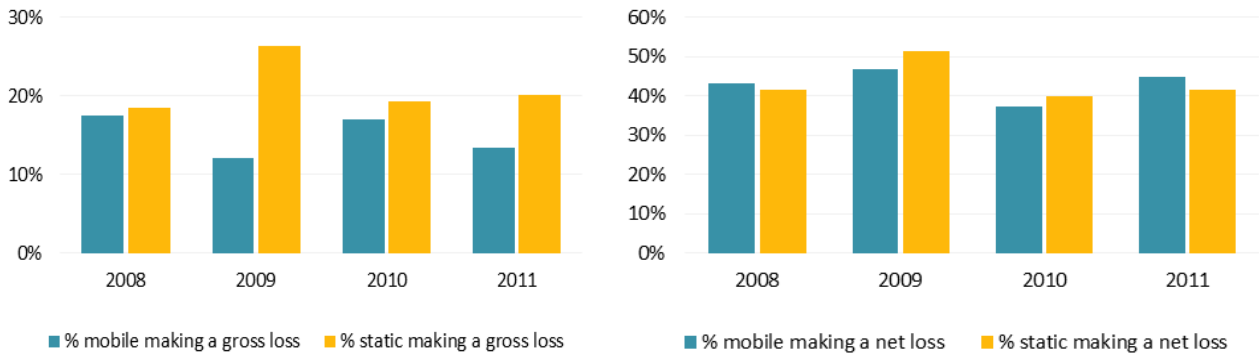
Source: EU Member States 2013 DCF data submissions

Figure 4 - Main performance indicators by fishing gear type in 2011.

Results from the 2013 DCF data, suggest that around 13% of mobile gear segments generated gross losses in 2011 i.e. vessels in these segments on average did not generate enough income to cover operational costs. The corresponding figure for 2008 was 18%.

A further 45% of mobile gear fleet segments suffered net losses in 2011 i.e. vessels in these segments on average made insufficient returns on capital invested. The corresponding figure in 2008 was 43%. In comparison, 20% of static gear fleet segments generated negative gross profits in 2011, compared to 19% in 2008, while 41% made net losses on average in 2011, the same as in 2008.

In 2009, there was a substantial increase in the proportion of segments making gross losses, in particular the static gears: 26% made gross losses and 51% made net losses. This trend was less pronounced in the mobile gear segments: 47% made net losses but only 12% made gross losses in 2009 (Figure 5).



Source: EU Member States 2013 DCF data submissions

Figure 5 – Percentage of mobile and static fleet segments making profits or losses in 2011.

Economic Performance Assessment for 2012 and 2013

As the most recent economic data available in 2013 refers to the year 2011, experts attempted to bring the report more ‘up-to-date’ by estimating 2012 and 2013 economic performance indicators. AER projections for 2012 at the EU fleet level were not possible as several MS were not in a position to provide the necessary data within the time-frame. Additionally, forecasts for 2012 and 2013 were attempted for several Member States using two bio-economic models[1]: (1) the EIAA model for EU Member States whose fleets operate in North Atlantic fisheries and (2) the BEMTOOL model for EU Member States fleets who operate in Mediterranean fisheries.

AER Assessment for 2012

Forecast figures for 2012 (using AER database projections) suggest that total fleet income increased in 9 out of the 14 Member States. Projections also suggest that in 2012, GVA as a proportion of income increased in 7 out of 14 MS, while gross margin increased in 5 and net profits as a proportion of income increased or remained stable in 6 out of 14 MS, respectively (Table 19). Therefore, improved economic performance is expected in 2012 for less than half of the national fleets analysed.

Table 19 Economic performance AER forecast indicators (million €) for 2012

Arrows indicate change (Δ) in relation to 2010: (\uparrow) increase; (\downarrow) decrease and (\leftrightarrow) stable/no change (Δ between -1 and +1%). The analysis covers the national fleets for which there was enough data to forecast economic indicators.

	Fleet income	Δ to 2011	GVA	Δ to 2011	Gross profit	Δ to 2011	Net profit	Δ to 2011	GVA % income	Δ to 2011	Gross Profit margin	Δ to 2011	Net profit margin	Δ to 2011
BEL	79,098	\downarrow	29,103	\downarrow	3,422	\downarrow	- 5,518	\downarrow	37%	\downarrow	4%	\downarrow	-7%	\downarrow
BGR	5,398	\uparrow	1,486	\leftrightarrow	5,172	\uparrow	- 5,996	\downarrow	-28%	\uparrow	-96%	\uparrow	-111%	\uparrow
DEU	150,718	\uparrow	69,614	\uparrow	19,334	\uparrow	- 2,078	\uparrow	46%	\uparrow	13%	\uparrow	-1%	\uparrow
FIN	37,239	\uparrow	14,217	\uparrow	5,430	\uparrow	2,073	\uparrow	38%	\uparrow	15%	\uparrow	6%	\uparrow
GBR	955,846	\downarrow	400,148	\downarrow	173,040	\downarrow	124,423	\downarrow	42%	\downarrow	18%	\downarrow	13%	\downarrow
ITA	905,283	\downarrow	386,662	\downarrow	142,687	\downarrow	- 77,979	\downarrow	43%	\downarrow	16%	\downarrow	-9%	\downarrow
LTU	42,260	\downarrow	643	\downarrow	3,970	\downarrow	- 6,950	\downarrow	-2%	\downarrow	-9%	\downarrow	-16%	\downarrow
LVA	24,682	\uparrow	12,527	\uparrow	8,876	\uparrow	6,775	\uparrow	51%	\uparrow	36%	\uparrow	27%	\leftrightarrow
MLT	12,672	\uparrow	8,016	\uparrow	3,069	\uparrow	- 19,326	\uparrow	63%	\uparrow	-24%	\downarrow	-153%	\uparrow
NLD	334,509	\uparrow	78,444	\downarrow	5,450	\downarrow	- 33,655	\downarrow	23%	\downarrow	-2%	\downarrow	-10%	\downarrow
POL	55,832	\uparrow	24,214	\uparrow	8,614	\downarrow	5,369	\uparrow	43%	\downarrow	15%	\downarrow	10%	\downarrow
PRT	448,219	\uparrow	304,941	\uparrow	118,086	\downarrow	16,033	\downarrow	68%	\uparrow	26%	\downarrow	4%	\downarrow
SVN	1,887	\downarrow	705	\downarrow	303	\downarrow	- 640	\downarrow	37%	\downarrow	-16%	\downarrow	-34%	\downarrow
SWE	150,275	\uparrow	78,267	\uparrow	47,053	\uparrow	15,822	\uparrow	52%	\uparrow	31%	\uparrow	11%	\uparrow
EU subtotal	3,203,918	\downarrow	1,404,728	\downarrow	508,575	\downarrow	18,353	\downarrow	44%	\downarrow	16%	\downarrow	1%	\downarrow

Source: EU Member States 2013 DCF data submissions

EIAA model projections for North Atlantic MS fleets

Results suggest that for the EU Member States operating in the North Atlantic²³, the Danish, UK, Latvian and Swedish fleets were projected as being 'profitable' in 2012 and 2013, generating net profit margins greater than 10%. The Belgian and Finnish fleets were projected as being 'reasonably profitable' in 2012 and 2013, generating net margins of between 0% and 10% of income. The Irish and Dutch fleets were projected as having 'weak profitability' in 2012 and 2013, with a projected net loss of more than 10% in both 2012 and 2013. The Estonian fleet was projected as having 'weak' profitability in 2012 and 'reasonable' profitability in 2013 (Table 20 and Table 21).

Table 20 - EIAA model Economic performance projections at national fleet level for 2012

million €	BEL	DNK	EST	FIN	GBR	IRL	LVA	NLD	SWE
Landings income	91.29	343	11.07	25.28	841.59	183.82	18.16	323.01	188.03
Other income	3.55	11.35	0.02	1.22	13.34	9.06	1.67	1.51	39.22
Labour costs	29.31	97.24	3.94	5.96	180.25	54.65	3.16	95.91	34.68
Gross cash flow	16.87	131.92	2.38	3.89	202.55	28.63	6.24	6.37	75.68
Net profit	7.32	42.08	-0.04	0.21	151.72	-34.86	2.4	-33.91	25.02
Gross value added	46.18	229.17	6.33	9.85	382.8	83.28	9.4	102.28	110.37
Net profit margin	8.0%	12.3%	-0.4%	0.8%	18.0%	-19.0%	13.2%	-10.5%	13.3%
Profitability 2012	REASONABLE	HIGH	WEAK	REASONABLE	HIGH	WEAK	HIGH	WEAK	HIGH

Source: EU Member States 2013 DCF data submissions/EIAA model

Table 21 - EIAA model Economic performance projections at national fleet level for 2013

Million €	BEL	DNK	EST	FIN	GBR	IRL	LVA	NLD	SWE
Landings income	90.8	406.13	11.59	25.89	880.11	188.38	18.29	317.82	179.8
Other income	3.55	11.35	0.02	1.22	13.34	9.06	1.67	1.51	39.22
Labour costs	29.14	110.49	4.13	6.09	188.22	55.82	3.18	95.33	33.25
Gross cash flow	17.76	162.35	2.61	4.16	226.13	30.75	6.44	8.72	72.77
Net profit	8.21	72.51	0.18	0.48	175.31	-32.74	2.59	-31.55	22.11
Gross value added	46.91	272.84	6.73	10.25	414.35	86.57	9.62	104.05	106.03
Net profit margin	9.0%	17.9%	1.6%	1.8%	19.9%	-17.4%	14.2%	-9.9%	12.3%
Profitability 2013	REASONABLE	HIGH	REASONABLE	REASONABLE	HIGH	WEAK	HIGH	WEAK	HIGH

Source: EU Member States 2013 DCF data submissions/EIAA model

BEMTOOL model projections for Mediterranean MS fleets

For the southern EU Member States operating in the Mediterranean and Black Seas²⁴, the Italian fleet was projected as having a 'weak' profitability in 2012 with a net margin of -1%, improving slightly in 2013, to produce a 'reasonable' profit of 2% of income respectively. The Maltese and Slovenian fleets were projected to have 'weak' profitability in 2012 and 2013, with projected net losses of more than 10% in both years.

Projections for Italy 2013: According to projected data for 2013, fish production is expected to continue on a declining trend, with a slight decrease of 2% compared to 2012. In fact, between 2012 and 2013 the model foresees a slight increase in gross cash flow (+0.8%) and GVA (+0.5%). Even though the economic trend is deteriorating, total net profit is expected to be positive in 2013 (Figure 7).

Projections for Malta 2013: With decreased effort, a decrease in energy costs (less energy consumption due to decreased days at sea) and other variable costs are expected. The increase in average landings price trend is expected. Combining all these factors, projections resulted in improved net profit values, increased value of landings, stable GVA and gross cash flow for 2013 when compared to 2012. All these parameters show a positive trend when compared with data from 2009-2011 (Figure 7).

23 It was not possible to produce EIAA projections for France, Lithuania and Portugal due to the amount of fishing activity undertaken by those Member States out of the North Atlantic region. No projections are available for the Spanish North Atlantic fleet due to data unavailability

24 It was not possible to produce BEMTOOL projections for the Cypriot, French, Greek and Spanish Mediterranean fleets due to data unavailability. In addition, it was not possible to project Bulgarian or Romanian fleet performance as the BEMTOOL model is designed for the Mediterranean area only

Projections for Slovenia 2013: Model outputs forecast that the value of landings will increase in 2013 by about 0.5% compared to 2012 but crew costs will also increase by 0.5%. GVA and gross cash flow will decrease in 2013 by 1% and 40% respectively compared to 2012. However, net profit will increase by 6% compared to 2012, indicating lower capital costs in 2013 (and most probably reduced capacity).

7. EU Member State Fleet Summary Report

A summary of the main issues affecting the economic performance of each EU Member States' national fleet in 2011 and 2012 are summarised below:

Belgium

The Belgian fleet mainly consists of beam trawlers operating in the North Sea, English Channel and other areas of the North Atlantic. The general trend for the Belgian fleet is continued deterioration in economic performance. The Belgian fleet has high operating costs, accounting for 92% of income in 2011, with crew and fuel costs alone accounting for 70% of income.

Bulgaria

National Fleet

The Bulgarian fleet is diverse with a broad range of vessel types targeting different species predominantly in the Black Sea. The general trend for the Bulgarian fleet is continued deterioration in economic performance. The Bulgarian fleet has suffered losses over the last three years, and if operating costs continue to be higher than income, the situation will continue. The main factors that influenced the economic status of the Bulgarian fisheries sector in 2012 were: (1) absence of bank credit lending policy that is desperately needed to enable the development of the sector; (2) a comparatively large number of ageing vessels; (3) poor weather conditions and (4) poor domestic consumption demand due to lack of affordability.

The Black Sea TAC (quota regime) was introduced in 2008 following the accession of Bulgaria and Romania to the European Union (EU). Despite the quota regime for turbot in community waters, a decreasing trend in turbot biomass has occurred since 2008. Hence, the implementation of additional and more effective management measures for restriction of turbot exploitation may be necessary and to be effective such measures would need to apply to non-EU fisheries catching turbot. To decrease overcapacity, Bulgaria has made significant efforts to withdrawing vessels from the fleet, particularly in the 6-12m, 12-18m and 18-24m length classes.

Small scale Fleet

Most of the vessels under 12m are engaged in small-scale coastal fishing with (anchored) gillnets. These vessels are generally owner-operated, for whom fishing is an additional income stream. The profit is the actual remuneration (wages) of the owner's work.

Denmark

Capacity in the Danish fleet decreased between 2010-2011 when measured in terms of number of active vessels, total gross tonnage or total kilowatt. At the same time, profitability (in terms of both gross and net profits) has decreased significantly. Employment also decreased and this trend is likely to continue over the next couple of years if the trend of smaller vessels being replaced by larger vessels with better technology continues.

Small scale fleet

The small scale fleet (defined as vessels below 12 meters using static gears), operate mostly in the Baltic Sea, and Kattegat. The total amount of income generated by the small-scale fleet accounted for €26.4 million in 2011, which is 7% of the national income for fisheries. The landings value generated by the Danish small-scale fleet has been stable from 2010-2011. The small-scale fleet have made losses in 2011 (gross loss of €1.8 million and net loss of €6 million). The loss in gross profit increased 40% from 2010 to 2011, while the net loss was stable. Whether the small-scale fleet can halt the negative trend of the economic performance in the coming years is uncertain.

Long-distance fleet

The Danish distant-water fleet mainly target deep-water shrimp (*Pandalus borealis*) in the North Atlantic, capelin in Greenlandic waters (ICES area XIV) and herring in the Norwegian Sea (ICES area I and II). The total value of fish landed by the long-distance fleet accounted to €29 million in 2011, corresponding to around 7% of the landed value of the Danish

fleet (Source: The Danish AgriFish Agency). During the last decade, the landings value of species caught by the long-distance fleet has more than doubled. Whether this trend is going to continue is uncertain.

Estonia

The year 2011 was difficult for a number of trawling companies. Of the 24 engaged in trawling, one terminated its activities during the year because it was no longer profitable to continue. The main reason was significant reduction in fishing quotas (in particular with regard to sprat), but also severe weather conditions and a continued rise in fuel prices. However, decrease in sales was offset by the rise in first sales prices of fish compared to the preceding year. The higher first sales prices were primarily due to good export conditions. Fisheries subsidies paid in 2011 to fishing companies for permanent cessation of fishing activities by scrapping or permanent reassignment of fishing vessels amounted to nearly one million euros. In addition, €400 thousand were paid for investments on-board fishing vessels.

Due to the continuous decrease in quotas for the internationally TAC-regulated species (European sprat and Atlantic herring) a decrease in total catches was observed in 2012. However, a slight increase in quotas and total catches is expected in 2013. The rise in fuel prices will be an important factor influencing fleet economic performance in the coming years.

The main management measures in Estonia are individual volume quotas (ITQs) in the open water fisheries (both Baltic and Atlantic trawling) and gear usage quotas (ITE; individual transferable effort) in the Baltic coastal fisheries. The Estonian experience shows that ITQs are an effective method for increasing the allocation of fishing rights to the most effective enterprises and speeding up the process of reducing excessive fleet capacity. The number of trawlers decreased significantly during the ITQ period (since 2001). In 2000, there were 189 vessels in the Estonian trawling sector and after ten years, this number decreased to 46 and is likely to decrease even further.

Small scale fleet

The small-scale fleet increased as fishing capacity was released in other fleet segments and the Ministry of Agriculture decided to use it in order to meet the additional need for small-scale fishing vessel entry into the register.

Finland

The Finnish national fleet is based on three main fisheries: pelagic trawlers, offshore vessels with passive gears targeting cod and salmon and small-scale fleet. The Finnish fleet as whole was making losses in 2011. Baltic herring stocks are currently exceptionally strong especially in the most important fishing grounds in Botnian Bay. Catches in 2012 and the TAC for 2013 for herring are at a record high. The market situation has also been favourable and therefore the economic performance of the pelagic trawlers looks promising for the near future.

Increased seal populations have strongly influenced the Finnish coastal fishery for several years. Many fishermen have had to stop fishing on traditional grounds. There has been a subsidy scheme in place to support fishermen to continue fishing elsewhere. There has also been a pilot project to subsidise intensive fishing for low value fish (mostly cyprinid fish) to remove nutrients from the water system. This has contributed to a new method of fishing and created new markets for non-commercial species.

Small scale fleet

The coastal small scale fleet is the biggest Finnish fleet segment with 1,548 vessels, with a high variation in the activity. The economic performance of this fleet deteriorated between 2010 and 2011.

France

National Fleet

While the capacity of the French fishing fleet has remained relatively stable since 2010 after a strong decrease, total fishing effort continued a decreasing trend in 2011. The year 2011 was generally better than 2010 in terms of economic activity. Indeed, a combination of landings increases and average prices resulted in an increase in value of landings of 12% compared to 2010. At the same time, fuel prices remained stable over most of the year, before increasing towards the end. Despite this, profitability remained satisfactory in many fleet segments. Nevertheless, economic performance differs significantly between fleet segments and supra regions (including overseas regions). For instance, vessels using pots and traps, drift and fixed netters 10-12m and dredgers under 12m were profitable in 2011, while most of demersal / pelagic trawlers and dredgers over 12m generated only modest profits, mainly due to increase in fuel costs. The economic situation was particularly worrying in the Mediterranean Sea in 2011, particularly due to the lack of abundance in pelagic species. In the Mediterranean, income for demersal / pelagic trawlers was mainly generated from hake and cephalopods (octopus, squid...) landings. Economic performance remained stable in 2012. However, the rising price of

fuel had a direct negative impact on vessel profitability. The most vulnerable segments are obviously the offshore trawlers, a reason why investment in new fuel-efficient vessels or switching to alternative, less fuel intensive fishing techniques (e.g. Danish seine) are solutions proposed to help the vessels maintain profitability. Fleet adaptation is particularly important during what will be an intense regulatory period (i.e. moving toward MSY, discards bans, etc.)

Small-scale Fleet

Economic performance improved in the small-scale fleet between 2010 and 2011 but to a lesser extent (3%) when compared to national fleet results (55%). Nonetheless, 14.6% of small-scale income was retained as profits in 2011, compared to the national fleet's 9.3% profit margin.

The small scale fleet represented about 70% of the national fleet in terms of active vessel numbers and consumed 9% of total fuel consumption. Although fuel consumption decreased 7% over the period 2009-2010, it has remained stable since 2010. As the fishing activity of the small scale fleet is limited to near the coast these vessels don't have as many options for reducing fuel consumption compared to the larger vessels that operate further from the coast.

Long-distance Fleet

The tropical tuna fleet reduced significantly in terms of size because of fishing exclusions. The economic performance has improved in the period 2008-2011, although in recent years profitability was negatively impacted by higher fuel prices and costs of resource access and security.

Germany

National Fleet

The German fishing fleet decreased further in size in 2012 in terms of vessels numbers. The number of vessels in the high seas fleet remained stable. The number of cutters and small scale fishing vessels decreased, thus continuing the long-term trend. Fleet segments were affected differently by price and quota developments.

Small-scale Fleet

The most striking development for the cutter fleet was the considerable increase in revenues from brown shrimp landings; the price more than doubled after the 2011 crash. Therefore, the economic situation became satisfactory again for the beam trawl fleet. The North Sea plaice stock is at an all-time high, and thus quota increased as well. However, the benefit for the fleet was limited due to decreasing prices.

Saithe fisheries in the North Sea were satisfactory. The lower quota was fully exploited and prices remained stable. The MSC certification of this fishery has been renewed and again proven conducive for marketing. The Nephrops fishery has become more and more important for the German cutter fleet due to the possibility of international quota exchange.

The Cod fishery in the North Sea was unsatisfactory due to slow stock recovery and resulting low quota. Baltic cod quota increased but it could not be fully exploited. The considerable stock increase led to a lack of food. Thus, the fish showed sign of malnutrition, resulting in lower prices.

Baltic flounder was successfully marketed in China. This is a promising development and might further benefit Baltic fishermen in the future.

The Baltic herring fishery was good, and the increased quota was fully exploited. Some high seas quota was internally assigned to the small scale fishery to improve the economic situation of this sector.

Long-distance Fleet

According to the German fishing industry, 2012 was a profitable year for demersal trawlers, while for the pelagic trawlers the picture was stable. Cod fisheries in the Svalbard, Barents Sea and Greenland areas were efficient; and quota was fully utilised. The Greenland halibut fishery was very efficient and led to positive results. The saithe fishery in Norwegian waters did not fulfil expectations. The demersal high seas fleet did not perform any fishing activities in the North Sea. Quota was exchanged with the cutter fleet.

The pelagic fleet experienced good results in the North Sea and North Atlantic fisheries on herring, jack mackerel and mackerel. The quota for blue whiting was unsatisfactory, but as partial compensation argentine could be targeted in parallel for the first time after several years. Some fisheries for both pelagic and demersal redfish opened in 2012.

Pelagic fisheries in Mauritanian waters took place for a short period only. Other activities outside ICES/NAFO areas did not take place in 2012: negotiations with Morocco and Mauritania failed, and the fishery in the South Pacific was unprofitable in 2011, and was no longer targeted.

Ireland

National Fleet

The composition, by segment, of the Irish national fleet (i.e. >10m and <10m LOA) in 2012 and 2013 reflects that reported for 2011. No significant removals or additions to the national fleet occurred, other than adjustments due to accidental loss, damage and occasional redundancy. There has been a 2% increase in vessel numbers in the under 10m segments.

In terms of the profitability and development trends the national fleet deteriorated for net profit margin (%), RoFTA (%) and remained stable for GVA per FTE (thousand €). Running costs continue to be a key driver influencing the economic performance of the Irish national fleet in 2011, particularly those associated with the identification and retention of crew and the cost of fuel and oils. Although marine gas oil prices throughout 2012 and into 2013 have shown some volatility they have maintained a slow annual increase in average price, which is consistent with the 5 year trend in the prices of crude, bunker and marine gas oil.

The internationally accredited (ISO65) Responsibly Sourced Standard has provided a national certification programme for Wild Seafood that was successfully achieved by a number of segments of the Irish fleet and a smaller number of related onshore facilities. Increasingly strong market demands for certified seafood products continue to generate a positive industry response to this opportunity with increased national and overseas interest capitalising growth in this area.

The ISO65 Responsibly Sourced Standard is considered to be of particular significance to vessels in the pelagic and polyvalent fleets targeting mackerel, which formerly held Marine Stewardship Council (MSC) certification. MSC certification of the herring fishery in the Celtic sea was achieved in 2012 and is prosecuted by a small fleet of 34 Irish registered vessels.

In its capacity as the government agency with responsibility for development of the sea fisheries sector in Ireland, Board Iascaigh Mhara commissioned Food Certification International to carry out a pre-assessment of a representative number of Irish fisheries under the MSC Principle and Criteria for sustainable fishing. The pre-assessment aimed to identify gaps and weaknesses in the sustainability of Irish fisheries to facilitate a strategic approach to the development of responsible and sustainable Irish fisheries.

A total of 19 métiers were identified for mixed demersal fisheries. The MSC unit of certification was defined for each fish stock and therefore a number of units of certification were defined for a given métier. Overall the project examined 8 fishing gear, fishing 18 species, over several ICES areas (stock management units) – creating a total of 79 Units of Certification. Information from this study feeds directly into the development of BIM's responsibly sourced standard and general work programme.

Small Scale Fleet

The number of small-scale vessels (under 12m) rose by 2% every year from 2011 and prior to 2011 increased by 7% and 4% between the years 2008/2009 and 2009/2010 respectively. Overall, this represents a 12% increase in the number of small-scale vessels from 1,598 to 1,835 between the years 2008 and 2011. This segment consisted of 1,934 vessels in 2013.

Italy

National Fleet

The size of the Italian fishing fleet remained stable in 2012, however both effort and production levels decreased. The 11% decrease in activity, which is mostly due to fisher reactions to the increased fuel prices, largely affected the volume of landings (-9%). The reduction in days at sea is also attributed to the reduction in activity levels of fishers, especially those employed on trawlers, for whom a social compensation (in Italy called "cassa integrazione") was issued by the Government.

Nevertheless, the market has not followed classical rules where lower production means higher prices. In 2012, a 10% decrease in the average first sale price caused a larger decrease in income from landings (-18%), which is the main cause of the decrease in most of the economic indicators. According to 2012 projections, a further decrease in labour costs can be expected, mainly due to the decrease in income levels. Energy costs also show an increase not related to activity levels (which decreased) but to increased fuel prices (projections are based on EU average fuel price). Estimations using the Italian fuel price provide lower values for energy costs, which is more or less stable compared to 2011 level (see 2012 and 2013 projections). In 2013, there was a slight decrease in fuel price in the first few months of the year and it is hoped that this may be a sign of economic recovery in the sector.

Small scale Fleet

Although decreased production seems to have also affected the small-scale fleet, this segment showed good economic performance in 2011, with increased revenues and profits when compared to the overall national fleet. However, according to projected data for 2012, the trend is deterioration: a further decrease in labour costs is to be expected, due to the decrease in the income level. In addition, energy costs are also expected to increase with the rising fuel prices in 2012 (projections are based on EU average fuel price). As for the national fleet, the slight decrease in fuel price in the first few months of 2013 may represent the first signs of the sector's gradual recovery.

Long-distance Fleet

The Italian long-distance fleet is mainly located in Mauritania, Seychelles, Mauritius, Madagascar and the Comoros. The key species include yellowfin tuna, skipjack tuna, octopus and common shrimp. Due to the reduced number of vessels, economic data was not provided for confidentiality reasons.

Latvia

The Latvian national fleet was profitable in 2011 and with increased income expected in 2012, this favourable situation is expected to continue. Towards the end of 2008 and during 2009, the Latvian fishery sector was negatively affected by the global economic crisis, which led to significant decrease in profit levels. Vessel scrapping between 2008 and 2010 and changes in the structure of fleet segments had a positive impact on incomes and minimised total costs resulting in an increase in profitability in 2011, and overall improvement in economic effectiveness. In 2012, there were two significant developments in the activity of Latvian Baltic Sea fishing fleet - a reduction in the volume of landings by 9% due to a decrease in the TAC for sprat and an increase in average fish prices.

Small scale Fleet

The Latvian small-scale fleet targets Atlantic cod, Atlantic salmon, European flounder, European smelt, Atlantic herring, European sprat and others coastal species. The number of vessels and landings volume decreased between 2011 and 2012, but the value of landings remained stable around €1.2 million. Total costs, effort (days at sea), GVA, gross profit and net profit remained stable between 2011 and 2012. Although the share of the value of landings generated by small coastal vessels as a proportion of national fleet income is quite insignificant (about 6%), this segment is very important for the country because it provides rare species to the market.

Long-distance Fleet

In 2012, Latvia had two long-distance trawlers over 40m operating in the North Atlantic and five trawlers operating in CECAF area (EEZ of Mauritania and Morocco), which all belong to three fishing firms.

Lithuania

Despite the profits obtained in 2011 by the Lithuanian fleet in large, cost effectiveness remains relatively low due to insufficient investments in the old fleet. Low fuel efficiency and considerable repair and maintenance costs reduced profitability and the GVA generated. Such cost items will further affect profits in segments with higher capital value vessels more than 24 m if investments are not promoted.

Multiannual capacity reduction to the balanced level (capacity for this segment reached a stable trend), could benefit an increase in income per vessel and better perspectives for employment.

Regarding the cod management plan, slightly reduced stocks of cod resulted in decreased quota by 8.9% for 2013. This will affect segments targeting cod such as the 24-40m demersal trawlers and 0-10m passive gears. The quota for Baltic herring and European sprat increased 15% and 11% respectively in 2013. This will result in a good outlook for pelagic trawl 24-40m vessels as well as other segments that operate in the Baltic Sea and catch moderate quantities of pelagic species. Increases in sprat and Baltic herring prices have also resulted in a better outlook for the fleet.

Small scale Fleet

The economic performance for this fleet improved. The cost drivers are first sale prices of target species and quota availability, while Repair and maintenance expenditures did not account for a significant part of the cost structure in this fleet.

Long-distance Fleet

For long-distance vessels fishing in NAFO, 2013 quotas are the same as in 2012, but significantly lower compared to 2011. In the NEAFC region, quotas increased 15% in 2013 but as these catches do not contribute significantly to the long-distance fleet's total catches, it will not have a considerable effect on the segment as a whole. For the CECAF region, which contributes the main bulk of catches, a considerable size of quota was obtained for 2013, giving a brighter outlook, taking into account the tendency of increase pelagic fish prices.

Malta

Overall, at the Maltese national fleet level increases in landings weight and higher average prices resulted in a 10.3% increase in the value of landings, from €11.3 million in 2011 to €12.6 million in 2012. Total operational costs and energy consumption for the year 2012 are expected to decline, consistent with the decrease in effort (days at sea) which decreased by 18.5% between 2011 and 2012.

Fleet profitability in 2011 was weak in nearly all fleet segments and this is expected to continue in future years considering the current trends but the economic development trend may improve in some sectors. From the socio-economic performance trends observed in the latest years (2010 and 2011) for the 14 segments analysed, over a third of the segments (5 segments) improved but these are mainly small-scale fleet segments and the 18–24m demersal trawlers. For the demersal trawl fleet segment, the situation is not expected to improve for several reasons. One reason is the rising fuel prices, which form a considerable percentage of variable costs. In addition, area restrictions to trawling around Malta may be implemented, which will greatly affect trawlers targeting demersal and deep-water shrimps. Therefore, economic performance is expected to remain low and potentially deteriorate further. Most other economic variables for the year 2013 are not expected to change drastically. However, fuel costs are expected to increase due to the substantial rise in fuel prices and consequently, profitability from this point of view is expected to be negatively affected.

Small scale Fleet

The small-scale fleet decreased significantly between 2010 and 2011, however the economic performance increased and the improving trend in the small-scale fleet segments is expected to continue into the future.

The Netherlands

National Fleet

In 2011, the economic performance of the Dutch fleet improved on previous years and was profitable. However, the economic situation is expected to have deteriorated again in 2012. The major factors causing the deterioration in economic performance include lower income due of decreasing prices and higher costs, mainly higher fuel prices. Additionally, the pelagic fleet lost fishing opportunities in 2012. Fishery licenses for African waters were not prolonged and fishing in Pacific waters was not profitable due to poor catches. Some vessels were not able to fish for some months.

The most important issues in the Dutch fishery sector are:

-Flatfish fishery in general (the beam trawl 12-18m, 24-40m and over 40m segments)

The introduction of the pulse fishery: In 2011 some 20 vessels were allowed by the ministry to invest in pulse technique. Permits were given on a temporary basis. The economic performance of these vessels in 2011 was encouraging and it is expected that results will become better generally for this part of the fleet. It is still uncertain whether the temporary permits will be transformed into permanent permits. In 2012 an additional 20 vessels were allowed to invest in pulse technique and those entrepreneurs started fishing in 2012 using a temporary permit. In addition to that, other fishermen applied for permits (around 40) but until now (2013) they are still not allowed to use the pulse technique. Economic reasons, ecologic reasons as well as societal reasons (Natura 2000, discard ban, market requirements, responsible fisheries) force fishermen more and more to innovate and to invest in more sustainable and economic viable flatfish fishing techniques (as an alternative for beam trawl). Saving fuel and costs (up to 50%), less discarding and less impact on the seabed are the most important advantages of using pulse technique to catch flatfish.

-Shrimp fishery in general (the beam trawl 18-24m segment)

The introduction of the pulse fishery: In 2011 the ministry allowed 3 vessels from this segment to invest in a pulse technique suitable for the shrimp fishery. These permits were also given on a temporary basis. The economic performance of these shrimp vessels (on an experimental basis and after that commercial operation) are rather good and it is expected that results will become better generally for this part of the fleet compared to traditional beam trawl. It is still uncertain and unclear if the temporary permits will be transformed into permanent permits. Other shrimp fishermen applied for permits but until now (2013) they are prohibited from using the pulse technique. Economic reasons, ecologic reasons as well as societal reasons (Natura 2000, discard ban, responsible fisheries) force fishermen to innovate and to invest in more sustainable and economically viable shrimp fishing techniques (as an alternative to shrimp beam trawl). Saving fuel and costs (up to 30%), fewer discards and less impact on the seabed are the most important advantages of using pulse technique to catch shrimp.

Long-distance Fleet (the pelagic trawl over 40m segment)

In 2012 this segment faced problems with effort in African waters and in the Pacific. EU-appointments and contracts with Mauritania stopped and the capacity of some 30% of the Dutch pelagic fleet could not be used. As a result of that vessels were tied up for a few months which were economically very unprofitable. Also in 2013, owners of the pelagic fleet will

not be able to schedule all trawlers for year-round fisheries. It is expected that trawlers will be tied up again for some months during the summertime.

-Small scale Fleet

This part of the fleet operates in the coastal zone and depends highly on the catch of sole, turbot, cod, mullet and seabass. The state of the stocks of these species are very important and effort (seasonal) and economic performance depend largely on that.

Poland

The economic situation of the Polish fishing fleet is expected to deteriorate in 2012, as a result of the increased number of vessels that will re-enter the fisheries after the 3 year cod quota allocation system, implemented in 2009 (rotating suspension of 1/3 of the cod fleet each year), terminates and lower TACs for pelagic species (sprat and herring). The national fleet however again produced extraordinary high landings income, 20% higher than in 2011 and 39% higher than in 2010. Subsidies in 2012 were as high as in 2011 (contributing to 25% of total income), which additionally improved economic gains for the fleet. Taking into account that effort increased in 2012 by about 15% only and number of active vessels by 6%, the fleet may well produce higher profits in 2012.

Individual limits implemented in 2012 for Central Baltic herring may have negative effects on the economic performance of segments targeting this species. Maximum allowable catch limits were established based on vessels size (length). Vessels below 15 m were allocated the lowest possible catch limit (80 tonnes) and vessels greater than 25.5 m the highest limits (800 tonne). In both cases the limits are, nonetheless, lower than actual fish capability of these vessels.

At the start of 2013, prices for Atlantic herring were slightly lower compared to 2012 (-5%) while sprat prices remained at historically high levels, which may contribute to better economic results for the national fleet in 2013, especially pelagic segments. Higher TACs for pelagic species will additionally have a positive impact on the performance of the fleet in 2013.

Less optimistic scenarios can be drawn for vessels dependent on cod catches. Cod prices are expected to decrease in 2013 as greater quantities originating from Norway become available on the European market; resulting from a significant increase in Norwegian cod quotas (+25%) and subsequent increased exports in 2013.²⁵ Lower cod prices may particularly impact on the economic performance of demersal fleet segments targeting cod in Poland (DTS, DFN, HOK and PG1012). The other issue that may have negative impact on these fisheries is the deteriorating individual condition of Baltic cod (skinny fish).

The quantity of fuel decreased 20% from 2008. The major factors causing the decrease in fuel consumption was again reduction in number of fishing vessels and subsequent reduction in days at sea.

Small scale Fleet

This fleet decreased between 2008 and 2012, mainly driven by decommissioning programmes, however the value of landings of the small-scale fleet were 14% higher in 2012 compared to 2011 and with lower levels of effort deployed (7% increase in fishing days). Subsidies are expected to become the most important source of income for small-scale fisheries in 2012 and will determine the economic results of the segment in the near future.

Long-distance Fleet

After ceasing fishing operations in Pacific waters (outside Chilean EEZ) due to poor Chilean jack mackerel stocks, the economic performance of Polish long-distance fleet is highly dependent on access to Moroccan and Mauritanian fishing grounds and available quotas. If the EU fails to reach an agreement that will allow the EU fleet to return to Moroccan waters, the Polish fleet will probably consider moving to Atlantic Antarctic fishing ground to commence a krill fishery. This however will happen only if a ready market for krill products emerges.

Portugal

The economic performance of the Portuguese fleet, which has been profitable over the last 4 years, is expected to have deteriorated in 2012, particularly in the small-scale fleet. However, these projections are based on landings for 2012, which may currently be underreported.

²⁵ <http://www.globefish.org/groundfish-december-2012.html>

There is an overall trend of decreasing capacity of the national fleet, both in terms of number of vessels, power and GT and in the number of active vessels, which is most likely to continue in the next few years. This is mainly due to the scrapping of particularly older aged vessels in the fleet. The price per kilo of landings shows an increasing trend related to the decrease in the total weight of landings. The implementation of measures at national level for restriction of catches of European Pilchard resulted in a decrease of catches of about 40% in 2012, from around 54 thousand tonnes to 32 thousand tonnes.

The Portuguese fleet is highly diversified with a broad range of vessel types targeting different species predominantly in the Portuguese Exclusive Economic Zone (27.9.a for the mainland fleet, 27.10 for the Azores's fleet and CECAF 34.1.2 for the Madeira's fleet). Eighteen vessels make up the hooks 24-40m segment, which mainly operates along the Africa Coast and Indian Ocean (FAO 34, 41, 51, 57). The fleet targets a variety of species but in particular large pelagic fishes, such as blue shark, bigeye tuna and swordfish.

Small scale Fleet

The small-scale fleet will decrease in terms of number of vessels due to a more rigorous criteria for licensing, especially for vessels with low levels of activity (e.g. from retired fishermen). The economic performance of the Portuguese small-scale fleet has deteriorated over the last few years and the situation is expected to continue in 2012 if landings did not increase.

Long-distance Fleet

Economic performance has deteriorated in recent years. However, the long-distance fleet is expected to remain profitable in the next few years. Longliners may face some constraints due to increasing restrictions regarding deep species and shark catches.

Romania

The Romania national fishing fleet is almost entirely represented by a small-scale fishery. The small-scale fleet has remained relatively stable with a marked improvement in the value landed due to internal market demand. The situation with poor concentration of ownership is the main explanation for the low level of investment in the sector, resulting in a lack of improvement in the technical condition of vessels. The general trend in the decreasing number of fishermen and number of vessels appears to have bucked in the 2012/2013 period and may correspond to changes in the number of days at sea and fishing days. These trends reflect the fluctuating character of activity from year to year and season to season. Additionally, fishermen find access to finance difficult.

The instability is underlined by the variability: in 2011 market demand for Thomas' rapa whelk resulted in the highest value of landings, and also an increase in the total annual volume reported during the 2008-2011 period. The small-scale fishery is represented by vessels less than 12m using, in the same season, polyvalent gears and polyvalent mobile and passive gears, the same vessels shifting from one gear to another in the same period. The reported data are supplied by fishermen in strict confidence. There are quality issues as they do not record in an accurate way all the expenses/selling value, etc. of the species captured for each type of gear or technique used. This fishery is characterised by a very high mixture of techniques due to the lack of a target species for catching and sale on the market.

Moving into 2012, essentially the same decreasing trend is expected, especially in the number of active vessels and fishermen. An increasing number of fishing days/days at sea is expected and as a consequence an increase in landings. Profitability is expected to be lower in 2012 compared to 2011 due to higher costs and lower income. Market prices were generally lower in 2012 compared to 2011. The main reason being the dependency of the fishery on the internal market and of a weakness in the selling system, due to a lack of concentration in the sector; the existing fishermen's organisations do not market their catch in a coordinated way.

Slovenia

National Fleet

The economic performance increased in recent years due to lower expenditure on repair costs and increases in income from other sources, although the performance is still poor. Due to scrapping in 2011, the size of the Slovenian fishing fleet decreased between 2011 and 2012: 6% in number, 38% in GT and 19% in kW. Consequently, landings volume decreased in 2012. Hence, a decrease in the value of landings and thus the total income of the Slovenian fleet is expected. Due to fleet reduction and related lower fishing effort, the biological status of fish stocks may improve. In view of this, landings volume may start to increase again due to better catches.

Repair and maintenance costs are expected to continue to increase in the future because the fleet is generally old and poorly equipped. Due to the current poor state and profitability of the fleet, improved GVA and profits is not expected.

Small scale Fleet

The same issues apply to the small-scale fleet. Approximately 20 fishermen have lost their jobs because of vessel scrapping. In the future, we can expect an increased number of small-scale vessels because some of them will start operating in a self-employed manner. Due to reduced catches, increase in prices for European pilchard (Sardine) and Anchovy and, consequently, higher income of those targeting those species can be expected.

Spain

The economic performance of the Spanish fleet, although highly variable, improved over the last four years and was profitable in 2011. In 2011, the number of fishing enterprises in the Spanish fleet totaled 10,096, with the vast majority (94%), owning a single vessel.

The Spanish fleet is highly diversified with a broad range of vessels types targeting many different species such as tunas, cod, anchovies, sardines, Squid, cuttlefish, octopus predominantly in the Mediterranean and Northeast Atlantic.

In 2012, according to the official statistics of Ministry of Agriculture, Food and Environment (<http://www.magrama.gob.es>), the reduction in size of the Spanish fishing fleet continued. Between 2011 and 2012, the size of the Spanish fleet reduced by 4%. This process has particularly affected the long-distance fleet segments, which decreased by 6%. According to the Spanish marine fisheries statistics, in the period 2010-2011 the total volume and value landed by the Spanish fleet increased by 12% and 8% respectively, reaching 2008 levels.

Small scale Fleet

The economic performance of the Spanish small-scale fleet deteriorated in 2011. This fleet segment has been performing at a loss over the last 4 years driven by a significant reduction in income.

Long-distance Fleet

The tropical purse seiner segment contained 40 vessels employing 1591 FTEs. This fleet segment generated an income of €334 million in 2011, a 15% increase from 2010. Other important segments were the demersal trawlers 24-40m (65 vessels, income of €68 million) and over 40m (29 vessels, income of €175 million) and Spanish longliners over 40m (30 vessels, income of €74 million). These three segments improved their economic performance in the period 2008-2011, with a profit margin between 5% and 10% in 2011.

Sweden

Towards the end of 2009, Sweden introduced a tradable fishing right system for pelagic quotas. The first transactions took place in the beginning of 2010 and the first effects became visible in late 2010 in terms of profitability for the pelagic fisheries. The effect of the new system can be better seen in the profitability of 2011 once capacity had been removed. However, decreases in quotas for pelagic species (most importantly for herring and sprat) had a negative effect on the expected profitability increase resulting from the system.

Fuel prices increased during 2010 and 2011 and remained at high levels during the beginning of 2012, which had an effect on all fisheries. The increase is supposed to have the greatest effect on segments fishing with active gears (e.g. trawls and seiners). In general, fuel consumption has decreased since 2009. The large demersal and pelagic vessels, demersal trawl/seines 24-40m, decreased their fuel consumption in 2011; the midsize demersal and pelagic vessels, demersal trawl/seines 18-24m, increased their use of fuel. Lower fuel consumption was generally the result of decreased number of days spent at sea and better fuel efficiency. Most of the rest of the Swedish fleet also decreased their fuel use. The question is however, how much further fuel efficiency rationalisation can occur without significant investments in new technologies and newer vessels.

The general trend since the beginning of the 2000s is a decrease in capacity, i.e. the number of vessels, which is also reflected in the reduction of total engine power and gross tonnage. This is partly due to management efforts directed at decreasing fleet size in order to bring it in balance with the resources. However, this is not the whole truth since a part of the decrease is because many fishermen have left the trade since they cannot make a living from fishing anymore. Some of the fishermen operating inside the pelagic fishing rights system have sold their rights and then left the sector while others just left the sector without being compensated. The profitability of the diminishing Swedish fleet is increasing perhaps not as fast as expected due to decreasing quotas.

The analysis of economic performance shows that all Swedish segments with vessels over 12 meters are making positive net profits. The segments with vessels with a length of less than 12 meters are all making negative net profits. Fuel prices have increased during 2010 and 2011 and stayed at high levels during the beginning of 2012, which will have an effect on

all fisheries but in particular, the active gears (e.g. trawls and seiners). Segments fishing with passive gears have been heavily affected in recent years by increasing populations of seals.

There is also a crew recruitment problem as jobs on board fishing vessels is not seen as a particularly attractive way of living for younger people due to the low wages and relatively poor working conditions compared to other jobs on land; this poor recruitment is reflected in the increasing average age of Swedish fishermen. This coupled with a decreasing fleet size is expected to continue for some time.

United Kingdom

National Fleet

The increase in the value of landings of 22% from 2008 to 2012 matches almost exactly the 23% increase in the consumer price index for fish and seafood and represents a real rate of growth of 7% over the period brought about by a 9% increase in landings. The decline in landings of mackerel has been compensated for by increases in herring and the other species important to the UK fleet. The number of vessels continues to fall steadily from 6,796 in 2008 to 6,414 in 2012 but the falling average age suggests that there has been little if any fall in capacity, newer boats being more effective than older ones. The fall in FTEs from 7,519 in 2009 – there was a decommissioning scheme in 2008, which distorts the impression for that year - to 7,113 in 2012, suggests that the cost of labour is continuing to cause substitution of capital for labour but the magnitude of the trend is not unduly strong.

While overall the fleet is profitable, with 16% of income being retained as net profit, there are considerable variations within the fleet segments and these are inconsistent within the segments or according to vessel size or according to the number of vessels within a segment offering little indication of the cause of the variability. The value of fishing rights showed a sharp increase of 29% between 2010 and 2011 reflecting optimism about the prospects of the industry.

Energy efficiency of the fleet continued to improve, by 6%, between 2010 and 2011, a consequence of the decreasing average age of vessels in the UK fleet.

An influx of vessels from the North Sea fishery for Norway lobster to the fishery west of Scotland has led to a shortage of kilowatt days-at-sea available to catch the quota. It is difficult to envisage how this will be resolved if the full quota is to be taken.

Small Scale Fleet

The increase in the value of landings of 7% from 2010 to 2011 is considerably poorer than 19% increase experienced by the national fleet as a whole, indicating that the smaller vessels have not been able to exploit the species where demand has been strongest. Landings by volume remained unchanged over the period.

The number of vessels rose from 2,859 in 2010 to 2,959 in 2011, an increase of 3%, indicating their exemption from the FQA system to fish a pool of quota. FTEs rose by 7% from 4,487 to 4,801 over the same period. The fleet is profitable, with 9% of income being retained as net profit.

The designation of Marine Protected Areas is ongoing in United Kingdom waters and a revised approach for managing fishing activities in the existing Marine Protected Areas (European Marine Sites) is also being developed. Levels of fishing activity in the proposed or designated sites are variable, but only account for small proportion of total fishing activity. Any management measures that follow designation are expected to have larger impacts on the fishing activities of small-scale fleets because these have fewer choices of alternate fishing grounds than the large-scale fleets.

Long-distance Fleet

The UK long-distance fleet consists of a few very large vessels fishing in Arctic waters and in the northern Atlantic near Greenland. The value of landings remained fairly steady at around €12m between 2010 and 2011. Little other information can be separated from the aggregate because the size of the fleet is too small to protect the commercial sensitivity of the data.

A ban on bottom trawling and the introduction of capacity limits has been proposed by the European Commission for the distant waters fleet. The impact of a ban on bottom trawling would add to costs though this would only impact negatively and in the short-run on fisheries with tradable quota. The longer-run effects are hard to judge. Capacity limits have only a short-run effect and may in the long-run lead to capital stuffing where quota is not tradable.

European Commission

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EWG-13-03/4 members: Anderson, J; P Accadia; J Berkenhagen; C Brigaudeau; N Carvalho; I Davidjuka; M Gambino; F Gravino; E Jackson; E Kaslauskas; E Kuzebski; J Lees; S Leonardi; L. Malvarosa; M Miguez; A Motova; C Moura; A Paulrud; P Rogers; A Souffez; C Stroie; K Taal; T Thøgersen; J Traguany & J Virtanen.

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Abstract

The 2013 Annual Economic Report (AER) on the European Union (EU) fishing fleet provides a comprehensive overview of the latest information available on the structure and economic performance of EU Member States fishing fleets. This summary report serves to highlight some of the key findings of the 2013 AER. Results on the economic performance indicate that the EU fishing fleet was again in profitable in 2011, with 6% of income being retained as net profit. On the whole, the EU fleet showed improvements in most of the main economic performance indicators analysed when compared to 2010. Projections for 2012 indicate increased income for over three-fifths of the fleets analysed but positive profit margins for less than half. As outlined in the Commission Decision of 26 August 2005 establishing a Scientific, Technical and Economic Committee for Fisheries 2005/629/EC the STECF draws up the Annual Economic Report on the European Fishing Fleet. In response to a request from DG Maritime Affairs and Fisheries (Structural Policy and Economic Analysis Unit) to facilitate its dissemination to the wider public, the STECF issued this summary document in addition to the 2013 AER full report. This summary report was reviewed and released by the STECF by written procedure in September 2013.

As the Commission's in-house science service, the Joint Research Centre's mission is to provide EU policies with independent, evidence-based scientific and technical support throughout the whole policy cycle. Working in close cooperation with policy Directorates-General, the JRC addresses key societal challenges while stimulating innovation through developing new standards, methods and tools, and sharing and transferring its know-how to the Member States and international community.

The Scientific, Technical and Economic Committee for Fisheries (STECF) has been established by the European Commission. The STECF is being consulted at regular intervals on matters pertaining to the conservation and management of living aquatic resources, including biological, economic, environmental, social and technical considerations.