

Presentation to the Long Distance Advisory Council of the
Annual Economic report of the EU Fishing Fleet 2020

AER 2020



JRC SCIENCE FOR POLICY REPORT

Scientific, Technical and Economic
Committee for Fisheries (STECF)

The 2020 Annual Economic
Report on the EU Fishing Fleet
(STECF 20-06)

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2020



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OBJECTIVE

Use the expertise of more than 50 people and the economic data of the fleets to obtain:

**A full overview of the economic situation of the EU fleet
in 2018.**

and project the situation to 2019 & 2020

TIMELINE



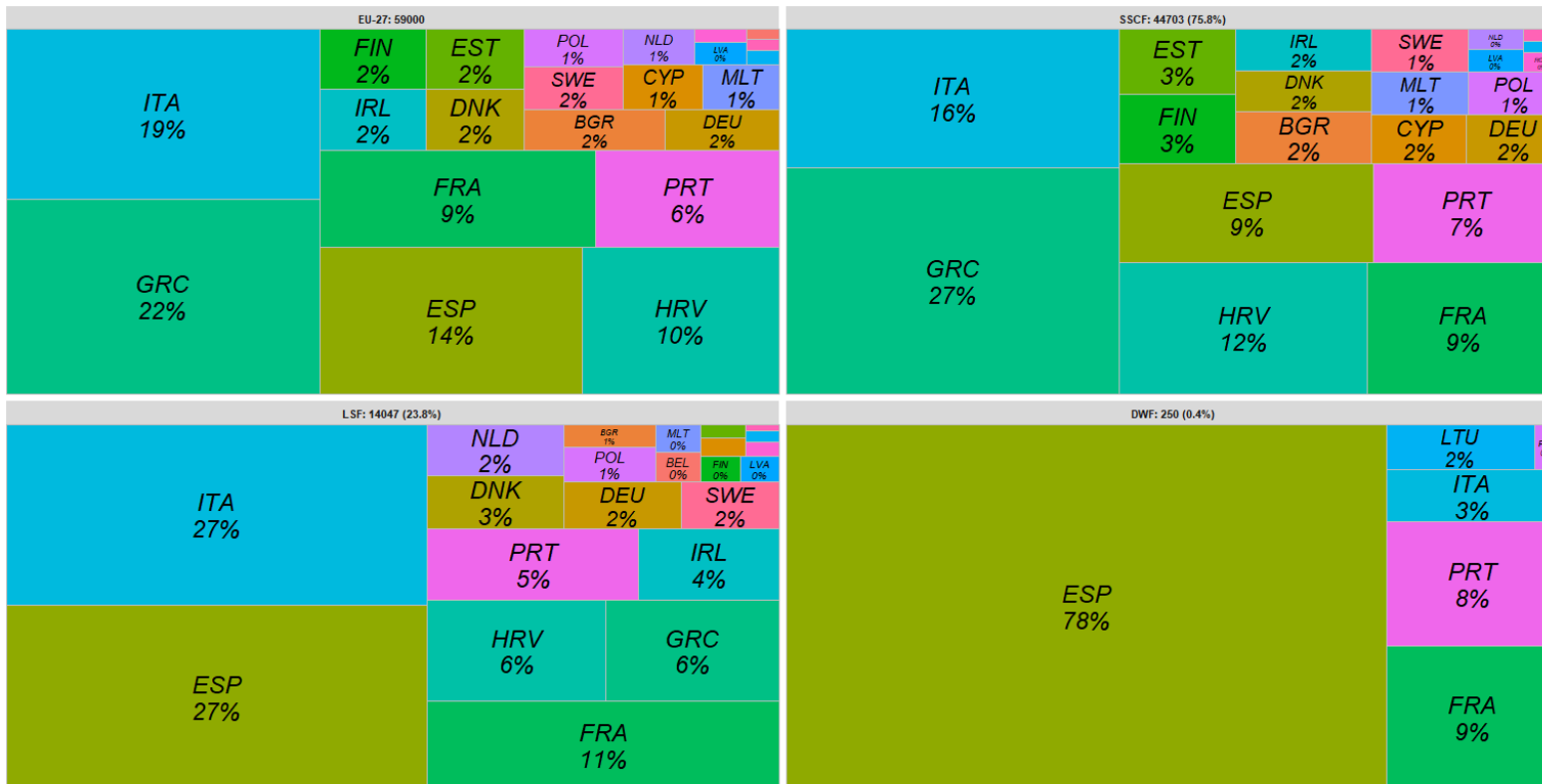
CONTENTS

- EU overview ➤ All, SSCF, DWF; LSF
- National chapters ➤
 - 2018
 - 2018 vs 2017
 - 2018 vs 2017-2008
 - 2019 (nowcast)
 - 2020 (forecast), including COVID-19
- Regional chapters ➤
 - MED, BS, BAL; NS; SWW;NWW
 - NAFO; ←
 - OR;
 - LDF: ICCAT, CECAF, IOTC ←
- Annexes ➤
 - UK NC
 - Nowcast and COVID-19 methodology
 - Tables and more tables
 - TFP

Use this link if you want to go through it

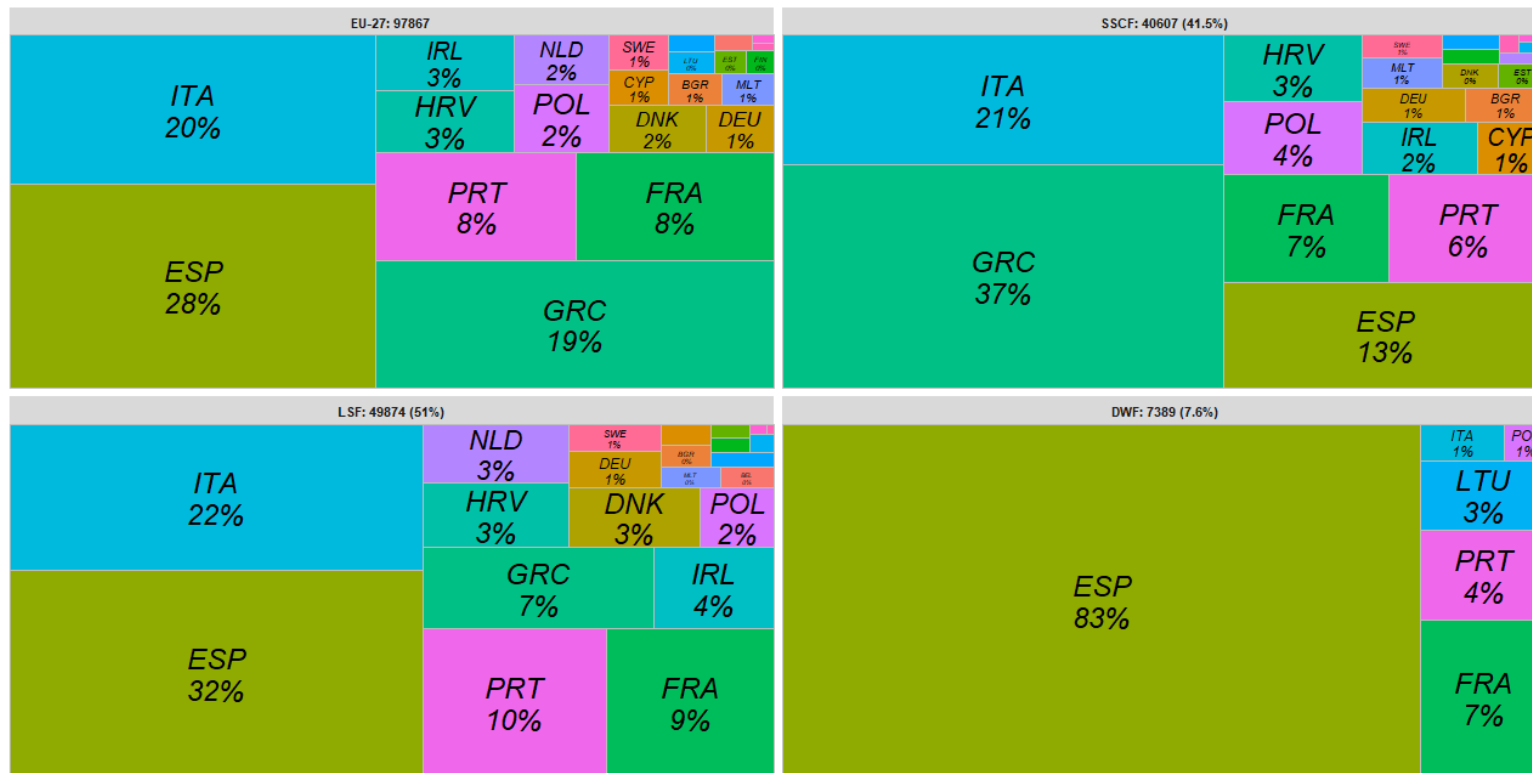


Distant Water Fleet (DWF)



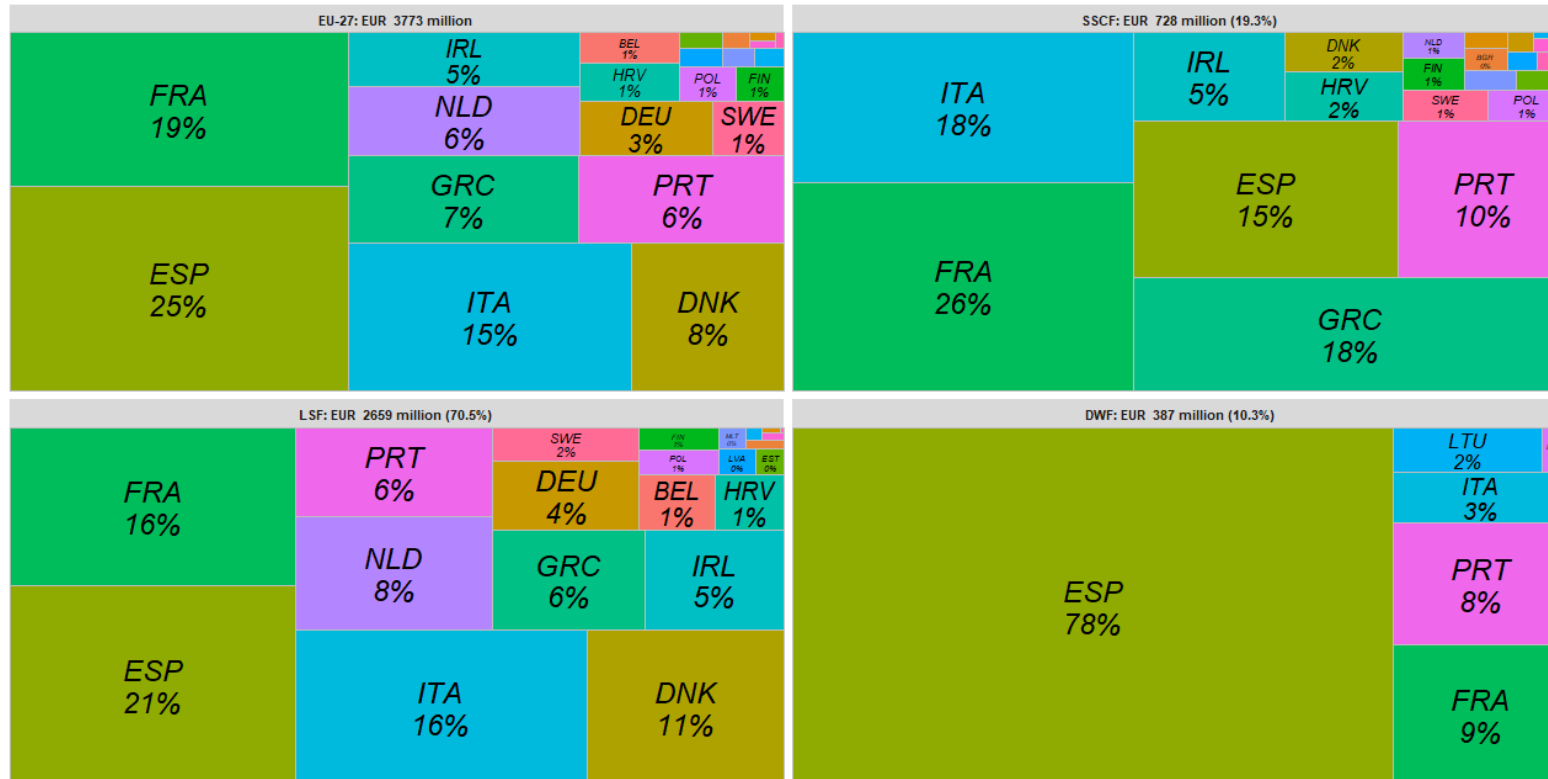
Number of Vessels
← 0.4%
of the EU-27 fleet

Distant Water Fleet (DWF)



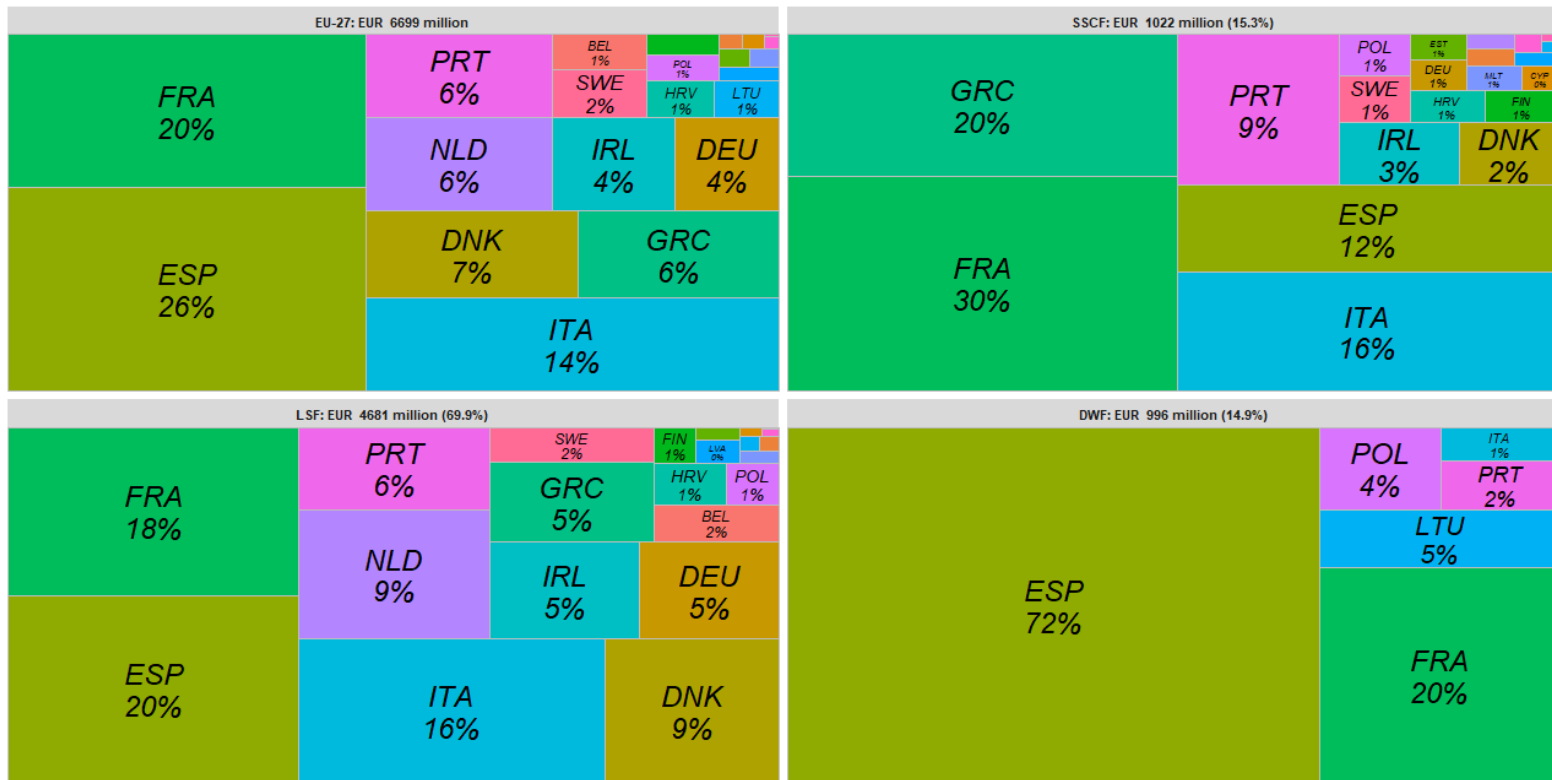
Number of FTE
← 7.6%
of the EU-27 FTEs

Distant Water Fleet (DWF)



GVA
← 10.8%
of the EU-27 GVA

Distant Water Fleet (DWF)



Landings value
← 14.9%
of the EU-27 landings

Source: AER 2020

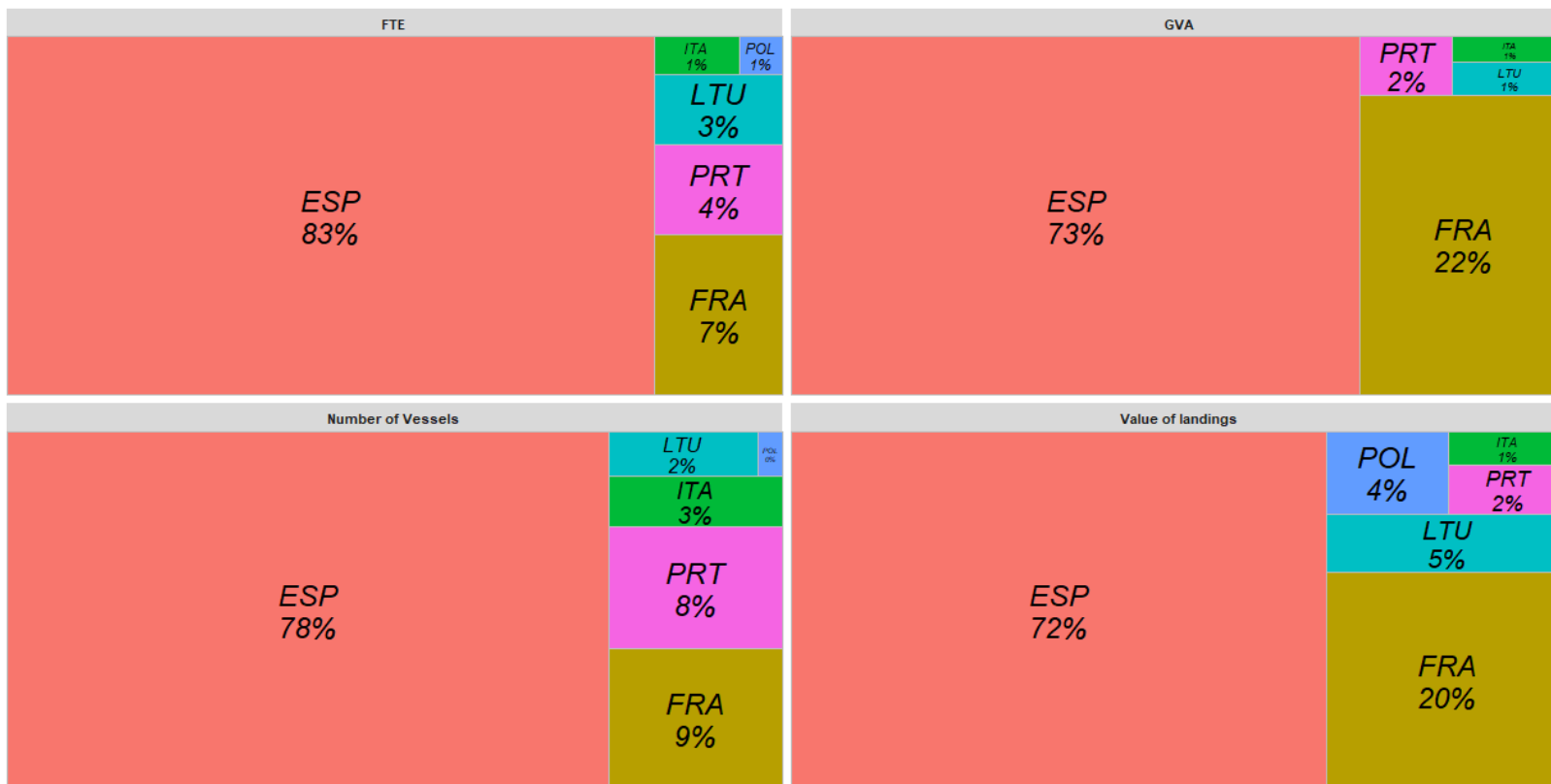
Background information

- With 15% of the landings, these are relevant EU fleets.
- In the AER structure, DWF belongs to the OTHER FISHING REGIONS (OFR), divided in:
 - OR: Canary islands, Azores, Madeira and French OR. (SSCF)
 - **DWF: over 24m and 50% of the effort in non EU waters (LSF)**

Background information

- In the last years, special effort has been made to fully cover this segment.
- **One independent expert (from the LDAC) coordinating this chapter. Your support is essential.**
- **Extra effort asked to the MS to provide geo indicators.**
- Still further extra work required to provide a full coverage of DWF:
 - Identification of drivers affecting the economic performance.
 - Relate them to the situation of the different segments.

ZOOMING
DWF



Capacity: 250 vessels

FTE: 7389

GVA: 387 million €

VL: 986 million €

International Commission for the Conservation of Atlantic Tunas ICCAT

Selection criteria

- EWG decided only fleets > 24 m LOA.
- With high dependency in the area: at least 40% of a fleet segment's total landed value taken from ICCAT.
- With tuna (or tuna like species) as target species.
- None of the 26 Spanish purse seiners included. Overall dependency at 23%.
- Although we know that at least six of them operate there.

International Commission for the Conservation of Atlantic Tunas ICCAT

2018 vs 2017

Profitable

Capacity and effort



+15% more days at sea
23% more vessels

Employment



+33% more jobs
+36% more FTE
-13% less wages

Landings and GVA



More landings but lower value
-2% less GVA
+59% more fuel costs
-36% gross profits

International Commission for the Conservation of Atlantic Tunas ICCAT

Drivers for Outlook (Current)

- Poor situation of the Atlantic (juvenile) bigeye stock .
- Limitation of number an area based management of FADs.
- HCRs under way and ready for albacore. More stability and certainty
- Shortfin mako (CITES), blue shark and other sensitive species. Catch limits and retention prohibition.
- Tuna loins contingents.
- COVID-19 related impacts.

Indian Ocean Tuna Commission

IOTC

Selection criteria

- Not possible for UK and Italy (confidentiality)
- With high dependency: at least 40% of a fleet segment's total landed value taken from the IOTC.
- With tuna (or tuna like species) as target species.
- The 14 Spanish purse seiners included + 12 French PS.
- Also, longliners from Spain and Portugal.

Indian Ocean Tuna Commission

IOTC

2018 vs 2017
Purse seiners

Profitable

Capacity and effort



+60% more days at sea (*)
Similar % more vessels (*)

Employment



-5% more jobs
+6% more FTE
-16% less wages

Landings and GVA



More landings but lower value
-22% less GVA
+11% more fuel costs
-26% gross profits

* Probably more related to statistical reallocation, we have to improve the time series.

Indian Ocean Tuna Commission

IOTC

2018 vs 2017
Others

- ESP. Longliners. 83 vessels. Lower activity than in 2017 and therefore less FTE. Economic performance **Profitable**.
- FRA Purse seiners Higher activity than in 2017 and better economic indicators. Economic performance **Profitable**.
- FRA. OR (Reunion). Mostly small scale. Economic performance **unknown**.
- PRT. Lower activity than in 2017 and therefore less FTE. Economic performance **unknown**.
- ITA. Economic performance **unknown**.
- UK. Economic performance **unknown**.

Indian Ocean Tuna Commission

IOTC

Drivers for Outlook (Current)

- Yellowfin landings down while skipjack up.
- HCR for skipjack and limits to yellowfin.
- EU vessels fully observer coverage, non-EU lower than 10%.
- Data issues around this area.
- COVID-19 related impacts.

Indian Ocean Tuna Commission

IOTC+ICCAT

Management in place

Type		IATC	ICCAT	IOTC	WCPEFC
	Limits in the catch or effort				
Longliners	TAC or catch limits	BET			BET
All	TAC or catch limits		BET/YFT	YFT	
All	Limits in the capacity	X	X	X	X
All	Limits in the supply vessels	X		X	
PS	Effort control	72d			Days per vessel
PS	Spatial-temporal closures	1 month			
	Use of FADs				
ALL	Marking FADs	X		X	X
ALL	Temporal prohibited FADs				3 months
ALL	Spatial-temporal prohibition of FADs		2 months		2 months
ALL	Number of FADs	70-450	500	350	350
ALL	Number of Boats			700	
ALL	Exclusive activation on board	X		X	X
ALL	Temporal closure of FADs	15 days			
ALL	Recovering of FADs	15 days			
ALL	No entangling FADs	from 2019	from 2016	from 2014	
	Others				
PS	Complete retention	X	X	X	X
PS	Transshipment	X	X	X	X

Fishery Committee for the Eastern Central Atlantic CECAF

Selection criteria

- Non tuna fleets (covered in ICCAT).
- France (7%), Spain (71%), Portugal (14%), Italy Lithuania and the Netherlands.
- Dependent on the fishing agreements (tuna and non tuna ones).
- For example, the agreement with Morocco came in the middle of the year.
- Profitability of these segments not assessed in the AER (lack of data).

The North East Atlantic Fisheries Commission NEAFC

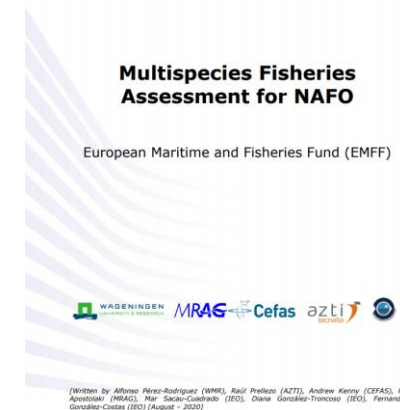
Selection criteria

- Not assessed.

The Northeast Atlantic Fisheries Organization NAFO

Selection criteria

- Estonia, Germany, Spain and Portugal.
- Regulated species are, shrimp, cod and redfishes.
- The EU fleet accounts for aprox. 2% of the NAFO landings.
- Check out the multispecies evaluation report. →
- Multi-species HCRs have winners and losers



The Northeast Atlantic Fisheries Organization NAFO

2018 vs 2017

Profitable

Capacity and effort



+40% more days at sea

Employment



+12% more FTE
-4% less wages

Landings and GVA



Less landings and lower value
-10% less GVA
+11% more fuel costs
-21% gross profits

The Northeast Atlantic Fisheries Organization NAFO

Drivers for outlook

- Poor situation of Cod 3M: Drastic cut in TAC, closure between Jan-March but also the use of sorting grids.
- Bad situation of Shrimp in 3M. (Cod-shrimp (negative) relationship observed in the multispecies models (check multispecies report)).
- This is an area in where other marine activities are affecting the environment.
- In general, the perspective in this area are not good, and re-allocation of efforts can be expected.

Conclusions

- AER is trying to have a full overview of the DWF.
- Resources are limited and tasks increase (COVID, Brexit,...)
- The main problem is the identification of fleets. We need the support from the MS, by including geo indicators (and data).
- But also the help of stakeholders (ACs) Your help and support in terms of knowledge and data analysis to produce robust time series.

AER

The End

Happy to respond any question that
you have or send it to:

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