DEPARTEMENT
LANDBOUW & VISSERIJ

///
//

ANNUAL FLEET REPORT FOR 2022 – BELGIUM

'Sustainable balance between fishing capacity and fishing opportunities'

31.5.2023

///
//

Compiled by:
Department of Agriculture and Fisheries
Policy Coordination and Environment Division

Author(s)
Bart Maertens, Policy Consultant

Date
31.5.2023

DEPARTEMENT
LANDBOUW & VISSERIJ

///

ANNUAL FLEET REPORT FOR 2022 – BELGIUM

'Sustainable balance between fishing capacity and fishing opportunities'

31.5.2023

Article 22 of Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy

///
//

TABLE OF CONTENTS

Vlaanderen
is landbouw & visserij

DEPARTEMENT
LANDBOUW & VISSERIJ

Vlaanderen
is landbouw & visserij

1 SUMMARY

A) Conclusion

In 2022 the capacity of the Belgian fleet increased by 1 062 kW and 164 GT (compared with 2021) to 44 691 kW and 13 853 GT. This increase is due mainly to the introduction of a new fishing vessel using the reserved capacity of a vessel withdrawn previously (in 2019). In general, the Belgian fishing fleet has decreased sharply, by a total of 35% in kW terms and 43% in GT terms, compared with the 2003 reference level. Fishing capacity is thus also well below the reference levels (Table 4.1). There were 64 fishing vessels at the end of 2022.

In 2022, the current reporting year, the same method was used to calculate indicators as in previous reporting years.

The 2013-2022 summary contained 15 possible fleet segments (Table 7.1). On the basis of the number of segments in 2022, together with the minimum time series of 3 years and the number of vessels to be contained in each fleet segment, the indicators were calculated for the following four segments, on their own or in combination with the allocated fishing technique:

FishingTech	LengthCat
DTS	VL2440
PMP	VL1824
TBB	VL1824
TBB	VL2440

The segments TBB 18-24 and TBB 24-40 are of particular relevance as regards the classifying of segments as 'in balance or imbalance' (ref. Ares(2015)462923 - 02/10/2015 and Ares(2016)5818532 - 07/10/2016).

Although the indicators for fleet segments DTS 24-40 and PMP 18-24 are set out in this report, the corresponding results will have to be interpreted with reservations because the segments are so small and diverse.

Where the amount of data relating to a fleet segment is limited, the absolute values of a number of indicators and the associated criteria can result in an unfavourable interpretation for the fleet balance in that segment. If, however, the standard calculations are seen in the light of the characteristics and trends within the Belgian fleet segments, it becomes clear that the applicable final assessment is 'in balance'. On the basis of the full range of indicators, it may therefore be concluded that TBB 18-24 and TBB 24-40, the significant fleet segments, are in balance with the fishing opportunities.

B) Summary overview

1. Is there a balance between fleet capacity and fishing opportunities?
   Yes. There is a balance. Stable in 2022.
2. Size of the fleet:
   64 fishing vessels: 13 853 GT and 44 691 kW.
3. Largest segments, main species and volumes landed:
   - Largest segments:
       o TBB 24-40 (formerly part of the large fleet segment, large beam trawlers)
       o TBB 18-24 (formerly part of the small fleet segment, beam trawl method)
       o DTS 24-40 (formerly part of the large fleet segment, large 'others')
       o PMP 18-24 (formerly part of the small fleet segment, small 'others')
   - Main species:
       o sole (2 444 tonnes)
       o plaice (2 314 tonnes)
   See Section 2.1 for details.
4. Number of changes in fleet capacity:
   6. See Table 4.1 for details.
5. Changes in stocks or fishing opportunities over the last year:
   None.
6. Plans to reduce fishing effort over the last year:
   None.
7. Entry/exit matched over the last year?
   Yes, fleet below reference levels and entry/exit requirements complied with at vessel level (Section 4.C).
8. Plans to improve fleet management?
   The main fleet segments were in balance in the 2022 reporting year.
   A reduction in fishing capacity may be introduced in 2023 with support as a result of Brexit and through the resources from the Brexit Adjustment Reserve (BAR), estimated at 10% or six fishing vessels.
9. Balance indicators applied?
   Yes.
   Key indicators:
   Technical (three, out of operation, VUW 220 and VUW observed), biological (two, SHI and SAR), economic (two, ROFTA-LTIR and CR/BER).

C) Analysis of the balance between fleet capacity and fishing opportunities

The analysis of fleet capacity and fishing opportunities indicates that there was little unused capacity and few unused fishing opportunities in 2022 and that both were in balance.

- Could the fishing opportunities be used with a smaller fleet? No (except for substantial reduction due to the Trade and Cooperation Agreement (TCA) with the UK – Brexit).
  Belgium's fishing activities are dominated by mixed demersal fishing for sole and plaice. A characteristic feature of the activities is that they aim to utilise 100% of target species, while the utilisation of by-catches is not dependent on the effort specific to them. Beam trawl fleets are particularly stable in terms of annual effort and fishing pressure exerted in relation to annual fishing opportunities. Efforts continued in 2022 to further develop fishing activities in a sustainable way through improved selectivity, energy efficiency, etc. Fishing activities are also managed, following consultations between the government and the producer organisation (PO), in such a way as to achieve a good distribution over the year. This is necessary in order to ensure that supply and marketing are stable. As in previous years, the government checks that this is the case when approving the POs' production and marketing plans.
  Although it targets two species, sole and plaice, the Belgian fleet, which is equipped for flatfish fishing, exerts uniform fishing pressure on the various components of the demersal ecosystem, partly by spreading the pressure over the various fishing grounds. Compared with other types of fishing, beam trawling exerts much less pressure on spatial or temporal aggregations/patterns. Such aggregations or specific components are avoided because the Belgian quota system seeks to allocate fishing quotas in a mixed package in which individual transactions between fishers are prohibited. All those factors play a part in the sustainable management of beam trawling. The negative impact of the beam trawl disturbing the seabed has decreased significantly in recent years as a result of changes made to gear (lighter chains, rolling beam heads, sumwing, etc.) depending on the areas fished.
  Apart from the majority of landings made by these beam trawl segments, there is only limited commercial fishing using other fishing methods. The vessels in question fish for certain quota components outside the scope of balanced beam trawling. Greater variability here presents a higher risk to economic viability.
  Although Belgium's (small) fisheries sector is, as has repeatedly been stated, below subsistence level, the sector is doing everything it can to develop as necessary to make the systematic transition to overall sustainability. Although the vessels are somewhat longer, the problems of fleet renewal, investment in family businesses, crew shortages, etc. are more widespread (which is similar to the situation with small-scale coastal fishing boats). While the landing obligation has now been fully implemented, the need for viable solutions remains high. Although Belgium has already learned important lessons in this regard, full implementation of the landing obligation presents major challenges to mixed fisheries, and only continuous, daily and intensive quota management can eliminate the main risks here.

  Brexit continues to pose many challenges.
  - The process of gaining access to the UK's 12 nautical mile (nm) zone through individual fishing licences has been completed. In this regard Belgium is/remains of the opinion that a (limited) number of vessels have been wrongly refused or not included in the historical capacity ceiling calculation. Belgium regrets that these files, where there were clear explanations for why the 4 years of presence had not quite been achieved (death of owner, sinking of fishing vessel, loss of fishing season due to large-scale conversion to sustainable fishing techniques, VMS signal just beyond the old/new UK 12 nm zone borders, etc.), were ultimately not accepted by the UK. The legislative framework is/was not established to take such circumstances into account. Belgium

therefore regrets that fishing vessels with a clear link to the UK 12 nm zone have literally slipped through the net and their access and corresponding rights have been lost. As far as Belgium is concerned, these files remain open.

- Landings by Belgian fishing vessels in UK ports are still not possible (except for a 'test run' as part of the projects aimed at achieving this during the last two years). Even if such a trip had been successful, the results could not be extended to the whole sector (no definitive solutions and new or different combinations of problems each time). Nor has it been possible to pass on the accumulated experience to the other ports frequently used by Belgian fishing vessels. In this respect, Belgium is very disappointed by the complete failure of this scheme despite the UK's 'commitment and will' to arrive at a swift solution. Belgium can only establish – on the basis of facts and experience – that this is not in line with the framework of agreements. Nor, according to its tasks and agenda, does the Specialised Committee on Fisheries appear to be a forum for dealing with such issues.

All this has had a severe impact on the Belgian fisheries sector (> 50% from UK waters) and chain operation, not only in economic and organisational terms, but also in terms of preserving (fishing) rights and profitability in the long term. In light of the current conflict situations and the risk of further phasing-out and hampering of fleet activities, the Belgian fisheries sector sees the consequences of Brexit as very bleak. In this way ideas for the use of Brexit funds to implement a scrappage scheme, in addition to the numerous initiatives and projects aimed at achieving the goals that are achievable, are gaining momentum. At the beginning of 2023, the sector seems to be heading for a 10% reduction in Belgian fleet capacity with support. This could mean a decrease of some 6 fishing vessels (3 from the small fleet segment and 3 from the large fleet segment, each with sufficient activity in UK waters).

- Is this likely to improve the financial situation of the fleet? No (except Brexit).
  Economic results will depend primarily on the fishing opportunities: the available quotas combined with good fish prices and low fuel prices.
  However, the impact of Brexit is much more complex. The scrapping incentive is a direct consequence of Brexit itself. While Belgium previously did not see any benefit in reducing fishing capacity with financial support – due, inter alia, to it being a very small sector operating at minimum level and the fleet being in balance – a limited adaptation might seem necessary. The successive Brexit/COVID/Ukraine crises also have a strong combined impact on confidence within the sector.
- Is F too high in relation to the Ftarget? No.
- Is the catch too high in relation to biomass?
  No, given that quota utilisation is closely monitored.
- CPUE – MSY? MSY.
- Dependency on government support? Yes.
  In recent years Belgian vessel owners have focused mainly on on-board safety and working and living conditions in addition to energy efficiency, selectivity and survival under the EMFF. There must be no let-up in this sustainable transition of the fleets if Belgium is to achieve its ambitious long-term targets. Accompanying measures have also been put in place during the successive Brexit/COVID/Ukraine crises; indeed, food security and safety concerns have become even more explicit. This support is absolutely necessary in order to cope with all this and also to boost the dynamics of the sectors and to doggedly continue to sustainably develop our fleet segments. Without government support, these necessary innovations are not possible.
- Can economic performance withstand fluctuations in costs (e.g. oil prices)? No.
  The major Belgian fleet segments use beam trawls, meaning that fuel costs are (and will remain) significant, despite considerable innovation and investment in reducing them as far as possible. Gas oil prices have a direct and major impact on the sector's profitability.

- Can fleets withstand short-term catch limits? No.

  Many crises (Brexit/COVID/Ukraine) and policy initiatives (FMY, landing obligation) have emerged in recent years. They had – and continue to have – a severe impact on the sectors concerned.

  The establishment of areas with fisheries measures (ban on seabed impact fishing techniques) is moving forward apace. This is particularly problematic for Belgian fishing vessels operating in waters of various Member States, the UK and NO. The fisheries sector shares the awareness of and concern for the good health of the seas and oceans, but the aggregation of each of these separate areas will have a significant impact on fishing activities.

  The need for offshore energy farms and the speed with which they are planned, designed and built also poses major challenges. The usable free space is constantly shrinking, and it is therefore questionable whether – according to the current forecasts – there will still be areas where economically viable fishing can be carried out by 2030-2050. Once again, the fisheries sector is not opposed to the development of the blue economy, but the speed of development is so high and the absence of a balanced framework so pertinent that the necessary objectives of multi-use and complementary sectors cannot/will not be achieved. On the contrary, it seems that fishing, which has been a user of the marine environment since time immemorial, will simply be banned and excluded in these developments.

  The EC action plan in early 2023 also includes many risks and threats to fisheries. Again, the industry shares the concerns and objectives underlying this bundle of initiatives. However, the warning not to de facto exclude or ban fisheries is more than justified. There is a need to create a framework that also provides for and guarantees the fishing sector's full potential and opportunities. This is particularly important for the renewal of marine spatial plans (after 2026). Where fishing was previously expected in current plans to develop its activities 'elsewhere', this will no longer be possible in the future.

  All these future plans, when mapped out, seem to encompass and block almost all fishing activity. The fishing sector stresses the need to include fishing space in marine spatial use. As an example, in BE there are ideas for connecting large marine nature parks (no human activity in the long term) or energy farms (unsuitable for fisheries, if only for safety reasons, for example). If fisheries are to continue to exist, consideration must – very urgently – be given to how fishing, including in these areas, can be continued in balance with the various (long-term) objectives. Not enough notice seems to be being taken of the voice and input of the fisheries sector regarding these delicate issues.

  Finally, the Norwegian (unilateral) decision to ban beam trawling in Norwegian waters from 1 October 2022 is very disadvantageous for Belgian fisheries. Given the considerable efforts made in recent years to restore fishing activities in NO waters, this constitutes a new constraint on recent activities. After so many years of inactivity, it is very regrettable that a large part of the expected opportunities are again being thwarted before they have properly been launched. BE clearly expects more from the EU-NO agreement. This observation also applies to the growing conflict situations between the EU and the UK.

D) Amendments to the fleet report compared with previous years The structure of the report is similar to last year.

2 SECTION A

2.1 DESCRIPTION OF THE BELGIAN FLEETS

Belgium's fishing activities consist mainly of beam trawling for sole and plaice (see Table 2.1). It also engages in shrimp fishing, otter trawling, *Nephrops* fishing and one remaining group 'other fishing' (consisting of static-gear, dredge and seine fishing, no dredge in 2022). Most fish is landed from the central and southern North Sea (IVb,c, 32%), the English Channel (VIIde, 35%), the Celtic Sea (VIIfg, 23%), the Irish Sea (VIIa, 7%) and the Bay of Biscay (VIIIab, 2%). Landings from other areas are negligible (< 3%). These percentages are very stable and do not change much from year to year. In 2022, landings from zone VIIde for the first time exceeded those from IVbc.

The decline in landings from the North Sea remains notable, falling to 32%. This is a concern for the fisheries sector in general and coastal fishing in particular. The impact of increased fishing pressure, even after the ban on pulse fishing, will have to be further examined.

Table 2.1 Overview of Belgium's main fishing activities in 2022			
Fishing method	Days at sea (%)	Landings (%)	Value (%)
Fishing method	Days at sea (%)	Landings (%)	Value (%)
Beam trawl	61.6	71.6	75.2
Otter trawl	8.2	10.0	8.2
Dredges	0.0	0.0	0.0
Shrimp	19.4	7.2	6.4
Nephrops	7.1	5.8	6.5
Static gear	1.0	0.1	0.1
Seine	2.7	5.3	3.5
Total	14 584	16 932 tonnes	EUR 79 285 000
Zone	Days at sea (%)	Landings (%)	Value (%)
IV b, c	41.7	31.5	27.2
VII d, e	26.2	35.0	30.3
VII f, g	20.6	22.5	25.2
VII a	6.3	6.5	11.1
VIII a, b	2.3	2.0	3.9
Other	2.9	2.5	2.3

Aanvoer Z. Noordzee (IVc)
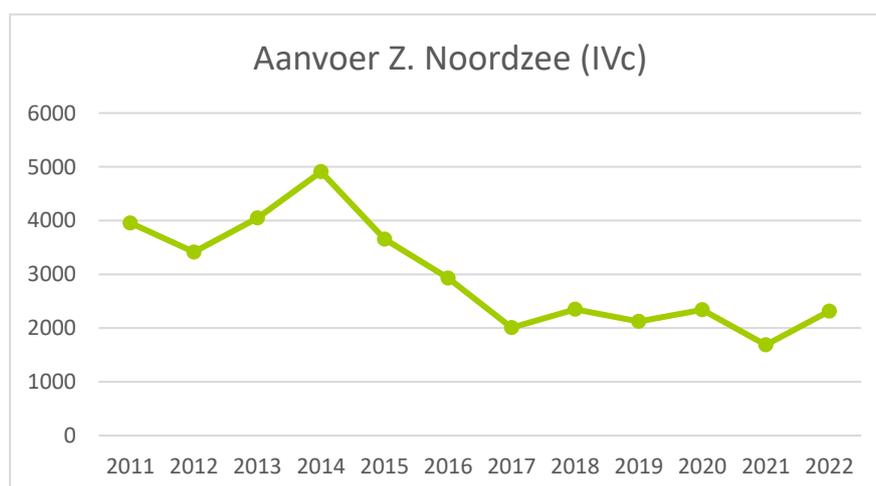
On 31 December 2022 the Belgian fishing fleet consisted of 64 vessels (the same number as in 2021). Broken down by segment, 33 vessels had engine power of more than 221 kW (large fleet segment, LFS) and 31 had engine power of 221 kW or less (small fleet segment, SFS). Detailed information on each segment is provided in Table 2.2. The average age of the fleet was 23 years (1 year less than in 2021) for the large fleet segment and 37 years (the same as in 2021) for the small fleet segment. In 2022, two vessels were taken into service in the LFS.

Table 2.2 Breakdown by fleet segment for Belgium in 2022		
Segment		Number
SFS (≤ 221 kW)	Coastal fishing boats	14
	Eurocutters	14
	Other	3
LFS (> 221 kW)	Large beam trawlers	28
	Other	5
Total		64

16 932 tonnes of fishery products were landed in 2022 (see Table 2.3). Of those, 13 405 tonnes were landed in the Belgian ports of Zeebrugge (51%, 6 789), Ostend (47%, 6 273) and Nieuwpoort (2.6%, 343). The remaining 3 527 tonnes were landed in foreign ports, mainly in the Netherlands and Denmark. The total value of the landings was EUR 97.3 million, EUR 79.8 million of which was landed in Belgian ports. Landings in foreign ports had a value of EUR 17.5 million. The volume of landings increased slightly (+ 1.5) for the first time in many years, but above all their value increased sharply (+ 26) due to strong fish prices. The average fish price rose from EUR 4.63 to EUR 5.75 (+ 24%), with various, typically Belgian fish species increasing above 30%, including sole, plaice, megrim, Norway lobster, scallops and brill.

Table 2.3 Development of the volume and value of landings by Belgium in 2022				
Year	Landings (tonnes)	Development N−1 (%)	Value of landings (k€)	Development N-1 (%)
2013	22 793	4.1	73 080	− 4.3
2014	24 273	6.5	81 267	11.2
2015	22 489	− 7.3	81 815	0.7
2016	24 583	9.3	93 329	14.1
2017	22 142	− 9.9	88 183	− 5.5
2018	20 646	− 6.8	84 593	− 4.1
2019	19 309	− 6.5	80 819	− 4.5
2020	18 306	− 5.2	74 339	− 8.0
2021	16 683	− 8.9	77 188	3.8
2022	16 932	1.5	97 285	26.0

Catches made in the various areas consist predominantly of sole (*Solea solea*) and plaice (*Pleuronectes platessa*) (see Table 2.4). They make up 14.4% and 13.7% respectively of the volume landed and, at 43.2% and 7.6% respectively, together account for over half of the value landed. Other species individually account for less than 1% of the volume or value landed.

Table 2.4 Composition of the volume and value of landings by Belgium in 2022									
Species	Landings		Value		Species	Landings		Value	
	Tonnes	%	EUR	%		Tonnes	%	EUR	%
Common sole	2 444	14.4	42 073 000	43.2	Lemon sole	440	2.6	2 137 000	2.2
Plaice	2 314	13.7	7 382 000	7.6	Scallops	414	2.4	1 331 000	1.4
Cuttlefish	2 255	13.3	9 854 000	10.1	Haddock	369	2.2	438 000	0.5
Skates and rays	1 512	8.9	3 703 000	3.8	Cod	270	1.6	1 088 000	1.1
Shrimp	1 109	6.5	5 996 000	6.2	Pouting	243	1.4	168 000	0.2
Gurnards	849	5.0	884 000	0.9	Mackerel	228	1.3	412 000	0.4
Megrim	847	5.0	1 922 000	2.0	Whiting	226	1.3	295 000	0.3
Anglerfish	700	4.1	6 054 000	6.2	Turbot	218	1.3	3 500 000	3.6
Norway lobster	586	3.5	4 518 000	4.6	Dab	181	1.1	154 000	0.2
Sharks	571	3.4	240 000	0.2	Brill	155	0.9	1 936 000	2.0
					Total of other species	1 001	5.9	3 202 000	3.3
					Total	16 932	100	97 285 000	100

2.2 BREAKDOWN OF FISHING ACTIVITIES

The dataset used to calculate the indicators is identical to that provided in response to the call made each year for data for the JRC's annual economic report.
The segmentation of the fleet in accordance with the standard classification is shown in Table 2.5:

Table 2.5: Composition of Belgian fleet segments		Year									
ClusteredGear	LengthCat	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
DTS	VL1012		1								
DTS	VL1218	1	2	1	1	1	1	1	1		
DTS	VL1824	7	8	7	6	6	8	8	8	8	8
DTS	VL2440	5	5	5	5	6	6	9	7	5	7
DFN	VL1012				1	1	1	1			
DFN	VL1218	1	1								
DFN	VL1824	1	1	2	1	1	1	1	1	1	1
DRB	VL1824	1	1		1		1	1	1	1	
DRB	VL2440		1	1	1	1	1				
FPO	VL1012									1	
TM	VL2440								1		1
TBB	VL1012	1									
TBB	VL1218	3	3	3	2	2	2	2	2	1	1
TBB	VL1824	25	24	25	22	21	18	18	17	17	16
TBB	VL2440	31	29	29	28	28	27	24	25	29	28
Inactive	VL1012			1							
Inactive	VL1218	1		2	3	1	1	1	1	1	
Inactive	VL1824	4	2	1	4	4	2	1	2	4	4
Inactive	VL2440	1	1	1	1	1	1	1	1	3	2
Total (1)		82	79	78	76	73	70	68	67	71	68

(1) Numbers may differ from the final total at the end of the year, depending on whether the vessels are included in the further analysis.

It is clear from the above that TBB 18-24 and TBB 24-40 are the only significant fleet segments.

In terms of both numbers and diversity, DTS 18-24 and DTS 24-40 are very limiting for any further accurate analysis. Indicators for the latter two segments have nevertheless been provided. The results of those indicators should not, however, affect the final decision on whether or not the Belgian fleet segments are in balance. The segments in question are too marginal and too diverse for it to be possible to reliably assess the indicators concerned.

2.3 DEVELOPMENT OF THE FLEET

The Belgian fleet segments are very stable in their composition, except for the smaller segments, which actually form a heterogeneous group of five remaining fishing vessels.
The most worrying development to be observed is the steady fall in the number of vessels. This, combined with other clear trends such as difficulties in recruiting crews, business succession, average age of fishers/vessels, and the general reduction in capacity of the entire fisheries sector and the related economy, sends out a clear signal that this primary sector is in need of stimulation and support in order to effectively tackle its current and future challenges.

3 SECTION B

3.1 OPINION ON PLANS FOR REDUCING THE FISHING EFFORT

The same as in previous reporting years.

3.2 IMPACT OF FISHING-EFFORT REDUCTION PLANS ON FISHING CAPACITY

The same as in previous reporting years.

4 SECTION C

Reference levels and fleet ceiling

The reference levels and fleet ceilings on 31 December 2022 were as follows (see Annex II to Regulation (EU) No 1380/2013):

GT ref =   **18 962 GT**
kW ref =   **51 586 kW**

Capacity of the fleet on 31 December 2022

Tonnage: **13 853 GT**
Engine power: **44 691 kW**

Fleet catch capacity as at 31 December 2022 (**13 689 GT** and **44 691 kW**) was below the reference levels (**18 962 GT** and **51 586 kW**).

The remaining capacity of previously scrapped fishing vessels was fully utilised in 2022.

Table 4.1: Changes in fleet capacity during 2022	Name	Number	Date	GT	kW	Comments
Fleet capacity on 1 January 2022 according to the fleet register				**13 689**	**43 629**	
Withdrawals without State aid				**− 335**	**− 1 421**	
O.83	JOKE	BEL040571986	14.6.2022	− 99	− 221	
Z.84	CALYPSO	BEL030151975	31.8.2022	− 236	− 1 200	
Capacity added without State aid				**491**	**2 262**	
Z.99	ARAVIS	BEL030992022	15.5.2022	240	1 062	using the capacity of Z.99 (already scrapped in 2019)
Z.38	ZUIDERZEE	BEL030391982	31.8.2022	251	1 200	using the capacity of Z.84
Capacity added without State aid through aggregation of engine power				**0**	**221**	
Z.182	HENNIE	NLD199001509	14.6.2022	0	221	of O.83
GT safety added				**8**	**0**	
O.191	ROMY	BEL011901963	27.4.2022	8	0	
Capacity of the fleet on 31 December 2022				**13 853**	**44 691**	

5 SECTION D

5.1 SUMMARY OF STRENGTHS AND WEAKNESSES OF THE FLEET MANAGEMENT SYSTEM

The principle that capacity can never increase except for reasons of GT safety, when the reserve between the fleet ceiling and current GT capacity can be used, is integral to all aspects of fleet management. In 2022, 8 GT safety was assigned. The Belgian fleet management system is operated on the basis of a fixed number of kilowatts, which can never increase. Some flexibility is provided for the management of gross tonnage by monitoring the capacity in relation to the number of kilowatts available.

There were no other specific changes compared with previous reporting years.

5.2 PLANS TO IMPROVE THE FLEET MANAGEMENT SYSTEM

One of the greatest challenges presented by the landing obligation is (still) to solve the problem of discard and choke species in typical mixed fisheries. During the early years when the obligation was phased in, the Member States focused the efforts of the regional groups on gaining experience by selecting less problematic or lower-risk species, and also the main commercial target species. From 2018 – and still in 2022 and beyond – mixed demersal fisheries have been faced with the complex problem of choke species, the impact of which is potentially very high. There is a risk of all fishing operations in an area having to be discontinued when one marginal quota has been exhausted, despite the fact that ample quotas remain for other target and by-catch species. Fleets are at risk of being made inoperative on account of the disproportionate number of choke species within the framework of sustainable exploitation to ensure that the fishing opportunities of the fleet segments are balanced.
The problem with current attempts to solve the problem of choke species is that they are, for the most part, partial solutions, many of which create new problems. What the Member States need are clear, pragmatic, global solutions which work smoothly, reliably and efficiently in practice in both the short and the long term.
The overall situation will also be strongly influenced by Brexit and the prospects it presents for the future. With regard to the Trade and Cooperation Agreement of 24 December 2020, Belgium is participating fully in this unclear ongoing process. The entire process with regard to data, scientific advice, TAC/quota and balanced fisheries management is proving very difficult. There is much concern whether this complex situation with the UK can/will develop rapidly in the near future.

5.3 INFORMATION ON THE GENERAL LEVEL OF COMPATIBILITY WITH FLEET POLICY INSTRUMENTS

Fleet capacity or changes to it are always compatible with policies based on a balanced fleet, given that greater sustainability is at the heart of Belgian fisheries policy.

6 SECTION E: INFORMATION ON CHANGES TO ADMINISTRATIVE PROCEDURES RELEVANT TO FLEET MANAGEMENT

There is a strong focus on technologies that increase the selectivity of catches and reduce unwanted by-catches.

Thus, by Ministerial Order of 22 December 2018, it was laid down that:
a) the tail, i.e. the last 3 metres of net before the cod-end of beam trawl nets from the BT1 (beam trawls with nets with a mesh size of more than 120 mm) and BT2 (beam trawls with nets with a mesh size of 70-89 mm) segments, must be made of netting material with a mesh size of at least 120 mm (the 'Flemish panel');
b) beam trawl nets from the BT2 segment of the LFS must promote selectivity in one of the following two ways:
- the ground-rope must be equipped with a flip-up rope; or
- at the bottom of the trawl net, before the Flemish panel, there must be a square-mesh benthic panel with a mesh size of 170 mm and a minimum length and width of 1.8 metres.

It should be noted that, under the discard plans since 2019 for the main geographical areas where Flemish fisheries are active, the use of the 'Flemish panel' is a condition for benefiting from certain exemptions from the landing obligation (e.g. the *de minimis* exemption for sole caught by a beam trawl with a mesh size of 80-110 mm in certain parts of the North-Western waters and in the North Sea).

In this context, the 'Flemish panel' is defined as follows:
'The Flemish panel is the last tapered netting section of a beam trawl,
- the posterior of which is directly attached to the cod-end;
- the upper and lower netting sections of the panel having a mesh size of at least 120 mm measured between the knots; and
- the panel having a stretched length of at least 3 m.'

The discard plans thus contain a number of other examples in which selectivity is key to obtaining an exemption from the landing obligation, e.g. in the case of high survival of undersized sole caught in the North Sea by beam trawlers with nets with a mesh size of 80-119 mm and equipped with a flip-up rope or a Benthos release panel.

In order, in the central and southern North Sea and large parts of the North-Western waters, to engage in directed fishing for sole using a beam trawl with nets with a mesh size of 80-110 mm (see Regulation (EU) 2019/1241), a further condition is that a panel with a mesh size of at least 180 mm be fitted in the upper half of the anterior part of the net.

7 SECTION F: BALANCE INDICATORS

7.1 TECHNICAL INDICATORS

7.1.1 Percentage of inactive fishing vessels

Table 7.1 lists all 'possible fleet segments' and the number of fishing vessels they contain.

Table 7.1: Number inactive		Year									
ClusteredGear	LengthCat	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
DTS	VL1012		1								
DTS	VL1218	1	2	1	1	1	1	1	1		
DTS	VL1824	7	8	7	6	6	8	8	8	8	8
DTS	VL2440	5	5	5	5	6	6	9	7	5	7
DFN	VL1012					1	1	1	1		
DFN	VL1218	1	1								
DFN	VL1824	1	1	2	1	1	1	1	1	1	1
DRB	VL1824	1	1		1		1	1	1	1	
DRB	VL2440		1	1	1	1	1				
FPO	VL1012									1	
TM	VL2440								1		1
TBB	VL1012	1									
TBB	VL1218	3	3	3	2	2	2	2	2	1	1
TBB	VL1824	25	24	25	22	21	18	18	17	17	16
TBB	VL2440	31	29	29	28	28	27	24	25	29	28
Inactive	VL1012			1							
Inactive	VL1218	1		2	3	1	1	1	1	1	
Inactive	VL1824	4	2	1	4	4	2	1	2	4	4
Inactive	VL2440	1	1	1	1	1	1	1	1	3	2
Total		82	79	78	76	73	70	68	67	71	68

The percentage of inactive fishing vessels in each length category is shown in Table 7.2.

Table 7.2: Percentage of inactive vessels										
LengthCat	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
VL1012	0.00	0.00	1.00	0.00	0.00	0.00	0.00	NA	0.00	NA
VL1218	0.17	0.00	0.33	0.50	0.25	0.25	0.25	0.25	0.50	0.00
VL1824	0.11	0.06	0.03	0.12	0.13	0.07	0.03	0.07	0.13	0.14
VL2440	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.08	0.05

There are no fleet segments in imbalance in accordance with the < 20% criterion. This has been the case for all of the past 3 years (see Table 7.2). The length category 12-18, which was previously already a limited remaining group, now consists of only one vessel, so the indicator is not relevant.

The major Belgian fleet segments are generally **in balance** as far as the 'inactive fishing vessels' indicator is concerned.

7.1.2 Days at sea / maximum number of theoretical and observed days at sea

Table 7.3: Vessel use / average 220		VUR 220									
ClusteredGear	ClusteredLengthCat	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
DTS	VL2440	0.85	0.73	0.79	0.92	0.86	0.83	0.84	0.89	0.76	0.69
PMP	VL1824	0.59	0.73	0.44	0.67	0.83	0.59	0.69	0.72	0.44	0.60
TBB	VL1824	0.72	0.74	0.69	0.78	0.75	0.81	0.77	0.78	0.78	0.78
TBB	VL2440	1.11	1.18	1.14	1.17	1.12	1.13	1.19	1.16	1.03	1.10

Table 7.4: Vessel use / maximum observed		VUR									
ClusteredGear	ClusteredLengthCat	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
DTS	VL2440	0.82	0.69	0.76	0.88	0.81	0.66	0.68	0.73	0.65	0.55
PMP	VL1824	0.67	0.62	0.70	0.82	0.93	0.84	0.74	0.63	0.67	1.00
TBB	VL1824	0.70	0.70	0.70	0.74	0.77	0.76	0.72	0.76	0.34	0.79
TBB	VL2440	0.89	0.94	0.89	0.88	0.88	0.84	0.90	0.85	0.77	0.84

The ratio with regard to theoretical use (Table 7.3) and observed use (Table 7.4) in each relevant fleet segment has not fallen under the 70% criterion for all of the past 3 years.

The Belgian fleet segments are accordingly **in balance** as far as the 'ratio of days at sea to theoretical and observed use' indicator is concerned.

7.3 BIOLOGICAL INDICATORS

7.3.1 SHI according to F/FMSY

Table 7.5 shows, for each relevant fleet segment, the stocks for which F and Fmsy are available as a percentage of total turnover. It is clear from this that the indicator is regularly below the 50% limit for the various fleet segments: DTS24-40, PMP18-24 and TBB18-24.

	Table 7.5: Percentage of landed value of fish stocks for which F/Fmsy is known											
Fishing Tech	**LengthCat**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**
DTS	VL2440	0.42	0.43	0.4	0.36	0.36	0.49	0.44	0.42	0.48	0.36
PMP	VL1824	0.61	0.3	0.38	0.27	0.36	0.39	0.34	0.14	0.47	0.95
TBB	VL1824	0.4	0.51	0.55	0.34	0.33	0.33	0.44	0.48	0.46	0.39
TBB	VL2440	0.63	0.68	0.64	0.63	0.59	0.62	0.66	0.65	0.63	0.62

The table shows that the SHI complies with the minimum 50% criterion only in respect of TBB24-40.

On the basis of the standard SHI calculation method, using only stocks for which F and FMSY have been defined, the values of the indicator are as follows:

| | Table 7.6: Sustainable Harvest Indicator 2022 | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Fishing Tech** | **LengthCat** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** |
| DTS | VL2440 | 1.31 | 1.25 | 1.22 | 1.18 | 1.20 | 1.15 | 1.02 | 0.96 | 0.81 | 0.85 |
| PMP | VL1824 | 1.82 | 1.80 | 1.90 | 1.99 | 2.11 | 1.93 | 1.43 | 1.07 | 0.94 | 0.91 |
| TBB | VL1824 | 1.67 | 1.68 | 1.64 | 1.64 | 1.61 | 1.56 | 1.46 | 1.37 | 0.99 | 0.98 |
| TBB | VL2440 | 1.38 | 1.43 | 1.38 | 1.35 | 1.32 | 1.28 | 1.13 | 1.10 | 0.99 | 1.02 |

The SHI indicator (Table 7.6) per relevant fleet segment does not exceed the 1 criterion, and this has been the case for all of the past 3 years.

The Belgian fleet segments are accordingly **in balance** as far as the SHI indicator is concerned.

The highly distorted picture of the SHI for the Belgian fleet segments was discussed in each of the previous annual fleet reports. In this context, there are three main comments:

- The relationship to 'turnover limited to stocks with F and Fmsy' introduces a very strong bias in the absolute value of the indicator for the fleet segments concerned in terms of economic dependence. If all of the stocks were taken into account, then the indicator would be in the range of 0.35-0.75.
- The high price of sole increases this bias. If the SHI were calculated on the basis of the weights, the SHI for TBB24-40, for example, would be 0.34, instead of 1.02, in 2022. This, again, is within the range of 0.35-0.75 as defined in the previous detailed studies.
- The positive/negative end value of the SHI indicator (just below 1 / just above 1) is strongly driven by the biological estimation F/Fmsy of sometimes one stock (e.g. sole 7d or sole 7f, g in the past 10 years), which is therefore also highly arbitrary for the fleet segment. The annual update also adapts historical data and can thus create a highly biased picture or a complete 'reversal' by the most recent estimate (e.g. benchmark).

The limitations of the SHI indicator in the Belgian situation have been clearly demonstrated in previous years. In such a situation, it is appropriate to monitor how the indicator develops. Not only does this provide more clarity; it also shows the results of the efforts to apply MSY as part of the CFP.
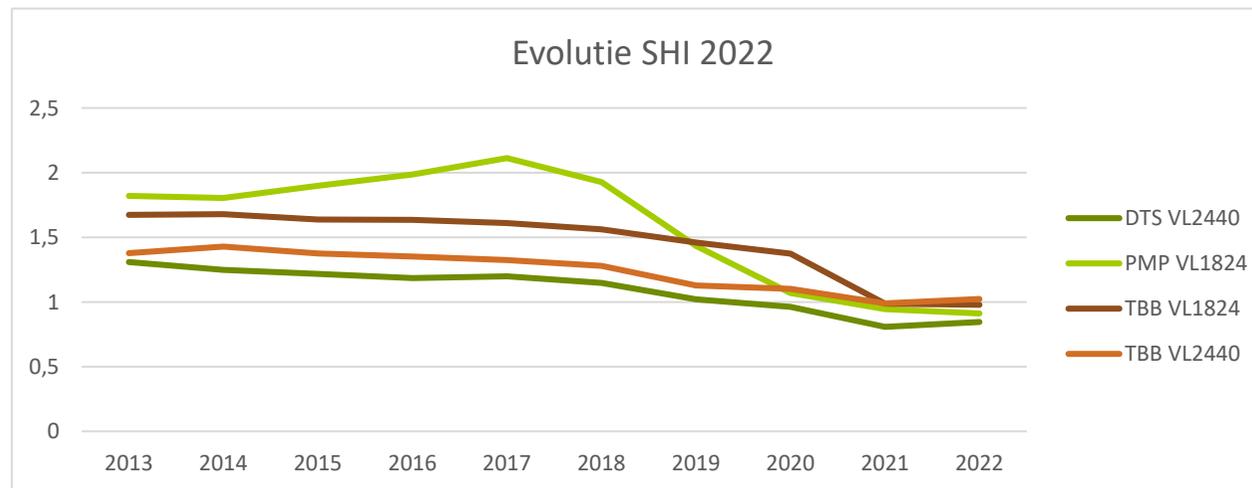
The trends of the SHI indicator again confirm the positive evolution for the biological evaluation of the catch composition and the status **in balance** for the Belgian fleet segments.

7.3.2 SAR

Table 7.9: Stocks at risk: SAR stocks											
Fishing Tech	**LengthCat**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**
DTS	VL2440	0	0	0	0	0	0	0	0	0	0
PMP	VL1824	0	0	0	0	0	1	0	0	0	0
TBB	VL1824	0	0	0	0	0	0	0	0	0	0
TBB	VL2440	1	1	1	1	1	1	1	1	1	1

The stocks responsible for this are set out in the following table:

Table 7.10: SAR stocks detail											
Fishing Tech	**Length Cat**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**
DTS	VL2440										
PMP	VL1824							Sole 4c-a-1			
TBB	VL1824										
TBB	VL2440	Sole 7a-a-2	Sole 7a-a-2	Sole 7a-a-2	Sole 7a-a-2	Sole 7a-a-2	Sole 7a-a-2	Sole 7a-a-2	Sole 7a-a-2	Sole 7a-a-2	Sole 7a-a-2

Species – ICES area – biological criterion – economic criterion

The indicator may be negative for fleet segment TBB24-40 in accordance with the criterion SAR > 0 (see Tables 7.9 and 7.10). That is not the case for all of the stocks fished in that segment, however:

- 520 tonnes of sole were caught in VIIa, which is very little (4.08%) in relation to the quantity (12 405 tonnes) landed by this fleet segment, especially as the stock of sole in VIIa was identified according to the second condition: Member State responsible for > 10% of the quota.

Irrespective of the status of the indicator based on this criterion, Belgium considers the perception that fleet segment TBB24-40 is in imbalance to be incorrect. The limit of > 0 is the determining factor and an important point to be considered when the guidelines are discussed.

The Belgian fleet segments are accordingly **in balance** as far as the SAR indicator is concerned.

7.4 ECONOMIC INDICATORS

7.4.1 ROFTA(-LTIR)

Table 7.11: ROFTA – low-risk long-term interest rate										
Fishing Tech	**LengthCat**	2013	2014	2015	2016	2017	2018	2019	2020	2021
DTS	VL2440	− 17.17	− 26.42	3.34	50.75	31.02	8.78	− 1.72	2.53	− 8.37
PMP	VL1824	8.28	2.14	− 21.12	− 0.14	− 11.69	− 6.84	88.59	1 672.25	210.44
TBB	VL1824	− 20.68	− 14.95	− 12.37	52.63	10.58	22.41	− 7.47	9.29	− 5.4
TBB	VL2440	− 13.79	2.08	21.7	66.1	40.34	19	35.22	34.93	− 1.36

There are no fleet segments in imbalance in accordance with the < 0 criterion. This has been the case for the past 3 years (see Table 7.11).

The Belgian fleet segments are accordingly **in balance** as far as the ROFTA-LTIR indicator is concerned.

7.4.2 Current revenue / break-even revenue (CR/BER):

Table 7.12: Current revenue / break-even revenue										
Fishing Tech	**LengthCat**	2013	2014	2015	2016	2017	2018	2019	2020	2021
DTS	VL2440	0.5	0.04	1.17	2.48	2.33	1.39	0.93	1.14	0.71
PMP	VL1824	1.53	1.18	0.21	1.04	0.51	0.77	2.25	5.04	3.05
TBB	VL1824	0.04	0.51	0.62	2.29	1.67	1.81	0.76	1.39	0.83
TBB	VL2440	0.66	1.07	1.66	2.41	2.13	1.52	1.73	2.23	0.96

CR/BER shows no fleet segments in imbalance in accordance with the < 1 criterion. This has been the case for the past 3 years (see Table 7.12).

The Belgian fleet segments are accordingly **in balance** as far as the CR/BER indicator is concerned.