DEPARTEMENT
LANDBOUW & VISSERIJ

ANNUAL FLEET REPORT 2021 – Belgium

'Sustainable balance between fishing capacity and fishing opportunities'

31.5.2022

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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

1 Summary 4
2 Section A 8
2.1 Description of the Belgian fleets 8
2.2 Breakdown of fishing activities 11
2.3 Development of the fleet 13
3 Section B 13
3.1 Opinion on plans for reducing the fishing effort 13
3.2 Impact of fishing-effort reduction plans on fishing capacity 13
4 Section C 14
5 Section D 17
5.1 Summary of strengths and weaknesses of the fleet management system 17
5.2 Plans to improve the fleet management system 17
5.3 Information on the general level of compatibility with fleet policy instruments 17
6 Section E: Information on changes to administrative procedures relevant to fleet management .. 18
7 Section F: Balance indicators 19
7.1 Technical indicators 19
7.1.1 Percentage of inactive fishing vessels 19
7.1.2 Days at sea / maximum number of theoretical and observed days at sea 20
7.3 Biological indicators 21
7.3.1 SHI according to F/FMSY 21
7.3.2 SAR 24

Vlaanderen
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7.4 Economic indicators 25
7.4.1 ROFTA(-LTIR) 25
7.4.3 Current revenue / break-even revenue (CR/ BER) 26

1 SUMMARY

A) Conclusion

In 2021 the capacity of the Belgian fleet increased by 2 400 kW and 436 GT (compared with 2020) to 43 629 kW and 13 689 GT. This increase is due to the introduction of two fishing vessels using the reserved capacity of previously withdrawn vessels. As a result, that capacity reserve has been exhausted and the (slightly) distorted picture following the withdrawals in 2018-2019 has been brought back into balance. In general, the Belgian fishing fleet has decreased sharply, by a total of 36% in kW terms and 44% 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 2021.

In 2021, the current reporting year, the same method was used to calculate indicators as in previous reporting years.

The 2013-2021 summary contained 14 possible fleet segments (Table 7.1). On the basis of the number of segments in 2021, 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:

Fishing tech.	**Length cat.**
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 TBB24-40, the significant fleet segments, are **in balance** with the fishing opportunities.

B) Overview

1. Is there a balance between fleet capacity and fishing opportunities?
   Yes, in balance. Stable in 2021.
2. Size of the fleet:
   64 fishing vessels: 13 689 GT and 43 629 kW.
3. Largest segments, main species and volumes landed:
   - Largest segments:
     - TBB 24-40 (formerly part of the large fleet segment, large beam trawlers)
     - TBB 18-24 (formerly part of the small fleet segment, beam trawl method)
     - DTS 24-40 (formerly part of the large fleet segment, large 'others')
     - PMP 18-24 (formerly part of the small fleet segment, small 'others')
   - Main species:
     - sole (2 526 tonnes)
     - plaice (3 419 tonnes)

   See Section 2.1 for details.
4. Number of changes in fleet capacity:
   19. 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 2021 reporting year.
   In the context of the North Sea, North-Western waters and South-Western waters discard plans (Regulations (EU) 2018/2035, 2018/2034 and 2018/2033 respectively), intensive use is made of selective and targeted fishing using the appropriate resources such as Benthos release panels or flip-up ropes in the North Sea and North-Western waters, where plaice survival rates are high (Section 6).
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 2020 and that both were in balance.

- Could the fishing opportunities be used with a smaller fleet? No.
  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. In 2021 efforts continued to be made to further the sustainable development of fishing activities by means of improved selectivity, energy efficiency, etc. Moreover, following consultation between the government and producer organisations (POs), fishing activities are managed so as to be spread evenly 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.
  In addition, Brexit continues to cause many problems. Various vessels have still not been given access to the UK's 12 nautical miles through individual fishing licences, despite their extensive files. Landing in UK ports and subsequent transport are still not possible either. Belgium is currently carrying out test trips to UK ports in order to develop the necessary cooperation and experience, but with mixed results. A number of obstacles still need to be overcome before commercial fishing via this route can be resumed, probably by summer 2022. These uncertainties are also having an impact on the way forward, including for the Specialised Committee on Fisheries. At the moment the impact on the fleet is still very high and very uncertain.
  COVID-19 had a major impact on fishing in 2021 as well. Belgium has sought, as far as possible, to allow these key sectors to continue their activities. Accordingly, it opted not to put a new laying-up scheme in place in 2021.
- Is this likely to improve the financial situation of the fleet? No.

Economic results will depend primarily on the fishing opportunities: the available quotas combined with fish and fuel prices. To mitigate the impact of Brexit, two BAR measures were launched in 2021. Three additional measures will be launched in 2022. Looking ahead to 2022, the Ukraine crisis will also lead to a fuel crisis that, again, will have a severe impact.

- 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. The complementarity and implementation of the measures for the successive crises of Brexit/COVID/Ukraine are complex. This support is absolutely necessary, however, 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? To some extent.
  In addition to the administrative transition from the CFP to the Fmsy principle, the main current and future challenges are the landing obligation and Brexit. In the context of Brexit, an effective catch limit is expected in the future, resulting in decreasing quotas. Continued access to UK waters, both to the 12 nm zone and to the 200 nm zone, and possible additional technical measures make all this uncertain.
  Another important development is the establishment of areas with fisheries measures. The number and size of these areas is increasing rapidly. Because its fishing grounds are so widespread, it is not self-evident for Belgium's fisheries sector to keep track of all these initiatives. Nor is it clear to what extent the fisheries sector will be free or able to adapt to this situation. Not enough notice seems to be being taken of the voice and input of the fisheries sector on this issue or on integrated marine spatial planning (wind energy, aquaculture, multi-use, etc.).
  Looking ahead to 2022, Belgium's access to the Norwegian economic zone is also at risk due to the unilateral imposition by the Norwegian authorities of a beam trawl ban in Norwegian waters from 1 October 2022. Given the considerable efforts made in recent years to secure that access, this would be an unfortunate development and further impede the ability of the fisheries sector to respond flexibly and proactively to the many challenges of the CFP.

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

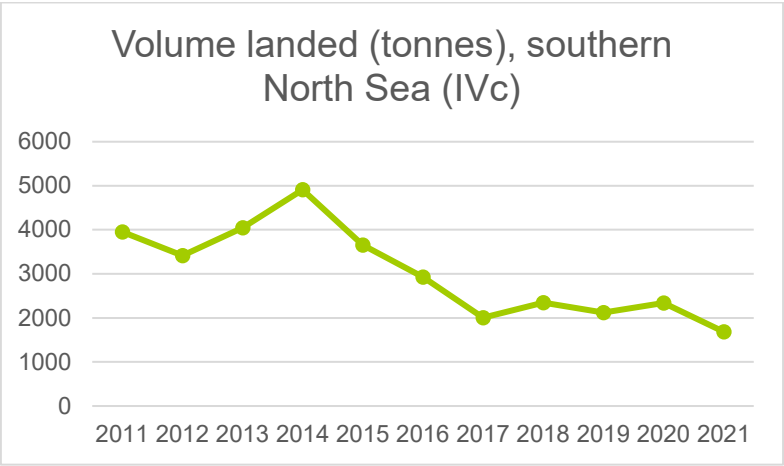
2 SECTION 2

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 the remaining group 'other fishing' (consisting of static gear, dredge and seine fishing). Most fish is landed from the central and southern North Sea (IVb,c, 37%), the English Channel (VIIde, 29%), the Celtic Sea (VIIfg, 23%), the Irish Sea (VIIa, 6%) and the Bay of Biscay (VIIIab, 3%). Landings from other areas are negligible (< 2%). These percentages are very stable and do not change much from year to year.
Although the North Sea, at 37%, still tops the list of landing areas, it should be noted that the importance of the southern North Sea (IVc) has fallen steadily and markedly in recent years. This is a concern to the fisheries sector in general and to coastal fisheries 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 2021

Fishing method	Days at sea (%)	Landings (%)	Value (%)
Fishing method	Days at sea (%)	Landings (%)	Value (%)
Beam trawl	67.5	77.5	80.8
Otter trawl	6.6	7.8	8.0
Dredges	0.4	0.4	0.3
Shrimp	13.2	3.2	3.6
Nephrops	8.3	6.8	5.2
Static gear	2.1	1.1	0.6
Seine	2.0	3.3	1.6
Total	13 161	16 683 tonnes	EUR 77 188 000
Zone	Days at sea (%)	Landings (%)	Value (%)
IVb,c	44.1	37.0	31.3
VIId,e	25.7	29.3	26.6
VIIf,g	19.3	22.6	25.0
VIIa	5.5	6.3	10.4
VIIIa,b	3.3	2.6	4.9



On 31 December 2021 the Belgian fishing fleet consisted of 64 vessels (the same number as in 2020). Broken down by segment, 32 vessels had engine power of more than 221 kW (large fleet segment, LFS) and 32 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 24 years (6 years less than in the previous year) for the large fleet segment and 37 years (1 year more than in the previous year) for the small fleet segment. There was considerable rejuvenation of the fleet in 2021, with six vessels being taken into service in the LFS and one in the SFS.

Table 2.2 Breakdown by fleet segment for Belgium in 2020

Segment		Number
SFS (≤ 221 kW)	Coastal fishing boats	14
	Eurocutters	14
	Other	4
LFS (> 221 kW)	Large beam trawlers	28
	Other	4
Total		64

16 683 tonnes of fishery products were landed in 2021 (see Table 2.3). Of those, 12 132 tonnes were landed in the Belgian ports of Zeebrugge (6 765), Ostend (5 070) and Nieuwpoort (298). The remaining 4 551 tonnes were landed in foreign ports, mainly in the Netherlands and Denmark. The total value of the landings was EUR 77.2 million, EUR 60.8 million of which was landed in Belgian ports. Landings in foreign ports had a value of EUR 16.3 million. The volume of landings decreased significantly (by 8.9%), while their value increased for the first time in years (by 3.8%). This was due to the fact that the average price of fish increased from EUR 4.1 to EUR 4.6, mainly as a result of the more expensive/ typical Belgian species such as sole, turbot, brill, Norway lobster, skate and ray, lemon sole, cod, scallops and anglerfish.

Table 2.3 Development of the volume and value of landings by Belgium in 2021

Year	Landings (tonnes)	Development N-1 (%)	Value of landings (EUR)	Development N-1 (%)
2012	21 894	8.7	76 351 000	−3.9
2013	22 793	4.1	73 080 000	−4.3
2014	24 273	6.5	81 267 000	11.2
2015	22 489	−7.3	81 815 000	0.7
2016	24 583	9.3	93 329 000	14.1
2017	22 142	−9.9	88 183 000	−5.5
2018	20 646	−6.8	84 593 000	−4.1
2019	19 309	−6.5	80 819 000	−4.5
2020	18 306	−5.2	74 339 000	−8.0
2021	16 683	−8.9	77 188 000	3.8

Catches made in the various areas consist predominantly of plaice (*Pleuronectes platessa*) and sole (*Solea solea*) (see Table 2.4). They make up 21% and 15% respectively of the volume landed, at 11% and 43% respectively, together account for over half of the value landed. Other species individually account for less than 1% of the volume landed.

Table 2.4 Composition of the volume and value of landings by Belgium in 2021

Species	Landings		Value		Species	Landings		Value	
	Tonnes	%	EUR	%		Tonnes	%	EUR	%
PLAICE	3 419	20.5	8 337 000	10.8	COD	509	3.0	1 788 000	2.3
SOLE	2 526	15.1	32 794 000	42.5	SCALLOPS	480	2.9	1 044 000	1.4
SKATES AND RAYS	1 292	7.7	3 219 000	4.2	HADDOCK	271	1.6	280 000	0.4
CUTTLEFISH	1 054	6.3	3 695 000	4.8	TURBOT	266	1.6	3 506 000	4.5
GURNARDS	799	4.8	833 000	1.1	WHITING	259	1.6	261 000	0.3
MEGRIM	716	4.3	1 033 000	1.3	POUTING	221	1.3	93 000	0.1
ANGLERFISH	701	4.2	5 528 000	7.2	WHELK	220	1.3	232 000	0.3
NORWAY LOBSTER	679	4.1	3 934 000	5.1	DAB	193	1.2	155 000	0.2
LEMON SOLE	616	3.7	2 404 000	3.1	BRILL	191	1.1	1 817 000	2.4
SHRIMP	607	3.6	2 724 000	3.5	FLOUNDER	160	1.0	72 000	0.1
SHARKS	539	3.2	263 000	0.3	Other	966	5.8	3 177 000	4.1
					Total	16 683	100	77 188 000	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									
Clustered gear	Length cat.	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**
DTS	VL1012	1		1							
DTS	VL1218	2	1	2	1	1	1	1	1	1	
DTS	VL1824	6	7	8	7	6	6	8	8	8	8
DTS	VL2440	5	5	5	5	5	6	6	9	7	5
DFN	VL1012					1	1	1	1		
DFN	VL1218	1	1	1							
DFN	VL1824	1	1	1	2	1	1	1	1	1	1
DRB	VL1824		1	1		1		1	1	1	1
DRB	VL2440	1		1	1	1	1	1			
FPO	VL1012									1	1
TBB	VL1012		1								
TBB	VL1218	3	3	3	3	2	2	2	2	2	1
TBB	VL1824	30	25	24	25	22	21	18	18	17	17
TBB	VL2440	31	31	29	29	28	28	27	24	25	31
INACTIVE	VL1012				1						
INACTIVE	VL1218	2	1		2	3	1	1	1	1	1
INACTIVE	VL1824	2	4	2	1	4	4	2	1	2	4
INACTIVE	VL2440	2	1	1	1	1	1	1	1	1	1
Total (1)		**87**	**82**	**79**	**78**	**76**	**73**	**70**	**68**	**67**	**71**

(l) 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

Reference levels and fleet ceiling
The reference levels and fleet ceilings on 31 December 2021 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 2021

Tonnage:	**13 689 GT**
Engine power:	**43 629 kW**

Fleet catch capacity as at 31 December 2021 (**13 689 GT** and **43 629 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 2021.

Table 4.1: Changes in fleet capacity during 2021	Name	Number	Date	GT	kW	Comments
Fleet capacity on 1 January 2021 according to the fleet register				**12 478**	**41 229**	
Withdrawals without State aid				**−1 182**	**−5 249**	
Z.700	BRAVEHEART	BEL037002012	18.1.2021	−23	−221	
Z.19	SONJA	BEL030191974	6.4.2021	−159	−902	Foundered in 2018
Z.59	RAQUEL	GBR000B13502	7.7.2021	−275	−1 122	
BOU.24	ZEEVONK	BEL000241964	8.8.2021	−44	−202	
O.13	MORGENSTER	BEL000131989	22.8.2021	−94	−218	Foundered in 2018
Z.85	ALEXIS II	FRA000686426	23.9.2021	−25	−221	
Z.90	FRANCINE	BEL030901982	15.10.2021	−311	−1 200	
Z.39	ZUIDERZEE	BEL030391982	28.10.2021	−251	−1 163	
Capacity added without State aid				**2 393**	**7 285**	
Z.483	JASMINE	BEL034832021	13.1.2021	385	1 200	using the capacity of B.462 (2018)
Z.19	BRIGITTE	BEL030192021	7.4.2021	322	902	Replaced Z.19, foundered
Z.98	WINDROOS	BEL030982021	19.4.2021	385	1 200	Replaced Z.98
Z.39	SOPHIE	BEL030392021	20.8.2021	385	1 163	Replaced Z.39
O.34	LADY FORTUNA	BEL030341988	23.8.2021	68	218	Replaced O.13, foundered
Z.24	ELIA	BEL030242021	3.9.2021	80	202	Replaced BOU.24
Z.91	FRANSON	BEL030912021	21.10.2021	384	1 200	Replaced Z.90
Z.26	AVANTI	BEL030262022	17.12.2021	384	1 200	Replaced BEL035101889 (2020, then Calypso)
Capacity added without State aid through aggregation of engine power				**0**	**442**	

Z.53	VAN EYCK	BEL030531981	19.1.2021	0	221	of Z.700
O.51	STORMVOGEL	BEL010511983	11.10.2021	0	221	of Z.85
Renumbering with an impact on capacity				**0**	**−78**	
Z.94	OP HOOP VAN ZEGEN	BEL030981991	7.7.2021	0	−78	Formerly Z.98
Capacity of the fleet on 31 December 2021				**13 689**	**43 629**	

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. GT safety was not applied in 2021. 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 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 2021 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 2: INFORMATION CHANGES IN THE ADMINISTRATIVE PROCEDURES RELEVANT TO FLEET SEGMENT

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 80-110mm 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 3m.'

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 80-119mm 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 80-110mm (see Regulation (EU) 2019/1241), a further condition is that a panel with a mesh size of at least 180mm be fitted in the upper half of the anterior part of the net.

7 SECTION ON 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									
Clustered gear	Length cat.	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
DTS	VL1012	1		1							
DTS	VL1218	2	1	2	1	1	1	1	1	1	
DTS	VL1824	6	7	8	7	6	6	8	8	8	8
DTS	VL2440	5	5	5	5	5	6	6	9	7	5
DFN	VL1012					1	1	1	1		
DFN	VL1218	1	1	1							
DFN	VL1824	1	1	1	2	1	1	1	1	1	1
DRB	VL1824		1	1		1		1	1	1	1
DRB	VL2440	1		1	1	1	1	1			
FPO	VL1012									1	1
TBB	VL1012		1								
TBB	VL1218	3	3	3	3	2	2	2	2	2	1
TBB	VL1824	30	25	24	25	22	21	18	18	17	17
TBB	VL2440	31	31	29	29	28	28	27	24	25	31
INACTIVE	VL1012				1						
INACTIVE	VL1218	2	1		2	3	1	1	1	1	1
INACTIVE	VL1824	2	4	2	1	4	4	2	1	2	4
INACTIVE	VL2440	2	1	1	1	1	1	1	1	1	1
Total		87	82	79	78	76	73	70	68	67	71

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

Table 7.2: Percentage of inactive vessels										
Length cat.	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
VL1012	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00
VL1218	0.33	0.20	0.00	0.50	1.00	0.33	0.33	0.33	0.33	1.00
VL1824	0.05	0.12	0.06	0.03	0.13	0.14	0.07	0.04	0.07	0.15
VL2440	0.05	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03

In at least one of the past 3 years, the percentages have been below 20%, except for category VL12-18. The length category 12-18, which was previously already a limited remaining group, 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									
Clustered gear	Clustered length cat.	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
DTS	VL2440	0.72	0.85	0.73	0.79	0.92	0.86	0.83	0.84	0.89	0.76
PMP	VL1824	0.58	0.59	0.73	0.44	0.67	0.83	0.59	0.69	0.72	0.41
TBB	VL1824	0.76	0.72	0.74	0.69	0.78	0.75	0.81	0.77	0.78	0.70
TBB	VL2440	1.07	1.11	1.18	1.14	1.17	1.12	1.13	1.19	1.16	0.96

Table 7.4: Vessel use / maximum observed		VUR									
Clustered gear	Clustered length cat.	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
DTS	VL2440	0.69	0.82	0.69	0.76	0.88	0.81	0.66	0.68	0.73	0.63
PMP	VL1824	0.76	0.67	0.62	0.70	0.82	0.93	0.84	0.74	0.63	0.69
TBB	VL1824	0.74	0.70	0.70	0.70	0.74	0.77	0.76	0.72	0.76	0.73
TBB	VL2440	0.87	0.89	0.94	0.89	0.88	0.88	0.84	0.90	0.85	0.71

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 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 INDICATOR

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.	**Length cat.**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**
DTS	VL2440	0.49	0.42	0.43	0.40	0.36	0.36	0.49	0.44	0.42	0.48
PMP	VL1824	0.51	0.61	0.30	0.38	0.27	0.36	0.39	0.34	0.14	0.47
TBB	VL1824	0.49	0.40	0.51	0.55	0.34	0.33	0.33	0.44	0.48	0.46
TBB	VL2440	0.62	0.63	0.68	0.64	0.63	0.59	0.62	0.66	0.65	0.63

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 2021											
Fishing tech.	**Length cat.**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**
DTS	VL2440	1.44	1.31	1.25	1.22	1.18	1.20	1.15	1.02	0.96	0.84
PMP	VL1824	1.95	1.82	1.80	1.90	1.99	2.11	1.93	1.43	1.07	1.06
TBB	VL1824	1.74	1.67	1.68	1.64	1.64	1.61	1.56	1.46	1.37	1.41
TBB	VL2440	1.46	1.38	1.43	1.38	1.35	1.32	1.28	1.13	1.10	1.05

The highly distorted picture of the SHI for the Belgian fleet segments was previously discussed in the 2016-2017 fleet report. The relationship to 'turnover limited to stocks with F and Fmsy' introduces a very heavy bias in the absolute value of the indicator for the fleet segments concerned as regards the economic dependence of the segments. (If all of the stocks were taken into account, then the indicator would be in the range of from 0.35 to 0.75.)

The high price of sole also increases this bias. If the SHI were to be provided on the basis of the weights, the SHI for TBB24-40 would be 0.43 in 2021. This, again, is within the range of 0.35-0.75 as defined in the previous detailed studies.

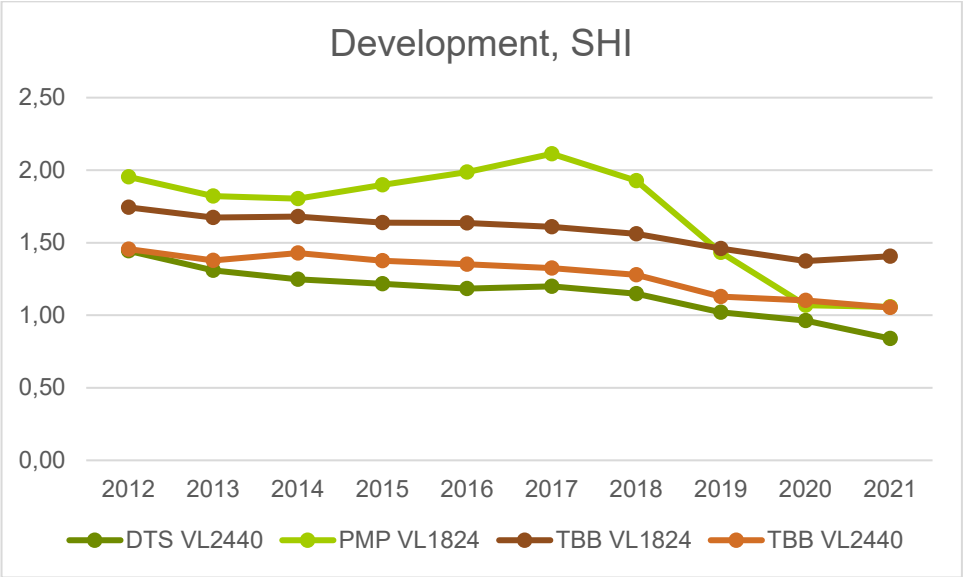
The negative values for 2021 are in stark contrast with the positive results in recent years (see Table 7.6 for 2020).

Table 7.6: Sustainable Harvest Indicator 2020

Fishing tech.	Length cat.	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
DTS	VL2440	1.48	0.75	1.21	1.17	1.07	1.01	0.97	0.94	0.91	0.89
PMP	VL1824	1.94		1.61	1.51	1.29	1.14	1.07	1.07	1.03	1.23
TBB	VL1824	1.72		1.49	1.41	1.20	1.03	0.95	0.93	0.91	0.93
TBB	VL2440	1.42	0.75	1.26	1.29	1.14	1.06	0.99	0.99	0.91	0.96

This is a known phenomenon in Belgium, where the biological assessment F/Fmsy of essentially one stock, sole 7d, determines whether the overall final result of the SHI indicator is positive or negative. As the annual update also adjusts the figures for previous years, it looks as though this assessment has been negative for a number of years. This is absolutely not the case. The current result is the consequence of the benchmark sole 7d in 2021 (sol.27.7d (ices.dk), which adjusted fishing mortality upwards. As a result, the SHI is suddenly negative throughout the update of the time series. This also demonstrates the limitation and 'on/off' effect of the SHI in Belgium. This effect is more pronounced for VL18-24 as these vessels, because they are smaller, are able to fish less far out and therefore have a higher sole 7d ratio.

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.



Belgium has already taken a large number of initiatives for sole 7d and, by extension, for all sole stocks. Since 2016, in order to protect the young year classes, it has increased the minimum landing length for all sole stocks to 25 cm. Belgium considers the approach to be proportionate, given the current positive developments, the previous favourable results and the sudden reversal, in 2021, of the SHI indicator through the sole 7d benchmark.

The SHI is higher than the 1 criterion for the various fleet segments except for DTS 24-40, which has a value slightly above 1 (1,7). This needs to be qualified in view of the severe limitations of the SHI in Belgium.

Irrespective of the status of the indicator based on this criterion, the perception that fleet segments PMP 18-24, TBB 18-24 and TBB 24-40 are in imbalance is incorrect. On the basis of the above additional information, Belgium considers the Belgian fleet segments to be **in balance** as far as the SHI indicator is concerned.

7.3.2 SAR

Table 7.9: Stocks at risk: SAR stocks											
Fishing tech.	**Length cat.**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**
DTS	VL2440	0	0	0	0	0	0	0	0	0	
PMP	VL1824								1		
TBB	VL1824	0	0	0	0	0	0	0	0	0	
TBB	VL2440	2	2	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.**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**
DTS	VL2440										
PMP	VL1824							Sole 4c-a-1			
TBB	VL1824										
TBB	VL2440	Whiting 7a-a2 Sole 7a-a-2	Cod 7a-ab-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:

- 462 tonnes of sole were caught in VIIa, which is very little (3.72%) 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.	Length cat.	2012	2013	2014	2015	2016	2017	2018	2019	2020
DTS	VL2440	−26.49	−17.17	−26.42	3.34	50.75	31.02	8.78	−1.72	2.53
PMP	VL1824	75.19	8.28	2.14	−21.12	−0.14	−11.69	−6.84	88.59	1 672.25
TBB	VL1824	−17.93	−20.68	−14.95	−12.37	52.63	10.58	22.41	−7.47	9.29
TBB	VL2440	−13.94	−13.79	2.08	21.7	66.1	40.34	19	35.22	34.93

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.

7.4.3 Current revenue / break -even revenue (CR/BER)

Table 7.12: Current revenue / break-even revenue										
Fishing tech.	**Length cat.**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**
DTS	**VL2440**	0.37	0.50	0.04	1.17	2.48	2.33	1.39	0.93	1.14
PMP	**VL1824**	1.82	1.53	1.18	0.21	1.04	0.51	0.77	2.25	5.04
TBB	**VL1824**	0.12	0.04	0.51	0.62	2.29	1.67	1.81	0.76	1.39
TBB	**VL2440**	0.63	0.66	1.07	1.66	2.41	2.13	1.52	1.73	2.23

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.