

**2020 ANNUAL REPORT ON THE ACTIVITY OF THE SPANISH FISHING FLEET**  
**Article 22 of Regulation (EU) No 1380/2013 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 December 2013**

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Owing to the large amount of information required to supplement the report, as the Spanish fleet is one of the largest in Europe, and to ensure that all the data and necessary documents are available for consultation, **an annex containing additional documents is included.**

## ANNUAL REPORT ON THE ACTIVITY OF THE SPANISH FISHING FLEET

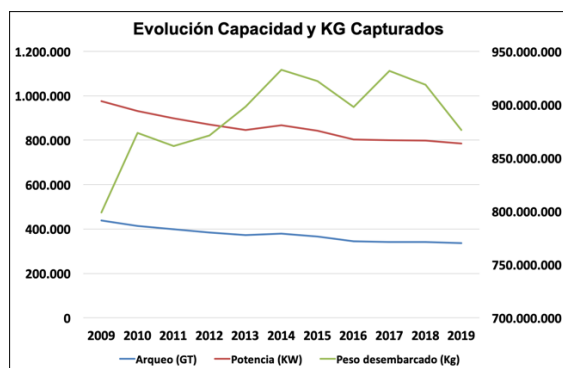
### A. REPORT SUMMARY

In 2019, of the **9 014 vessels** on the register, 8 007 (88.8%) were active in fishing and the remaining 1 007 were inactive (11.17%). It was mainly the artisanal fleet that was inactive, as 873 of the vessels not performing any activity in 2019 were under 12 metres in length.

In addition, in the course of 2019, a total of 131 vessels were permanently removed from the register and there were 40 new registrations.

The Spanish fleet operates mainly in national fishing ground waters as, of the 8 007 vessels active in 2019, 7 618 operated in those waters (more than half of them in the Cantabria and NW zone), accounting for approximately 36% of the total tonnage and 61% of the total kW. In 2019, the average **age** of the active Spanish fleet was 31 years.

Analysis of the trend in the Spanish fleet over the past 11 years shows that although the number of vessels and, therefore, their tonnage and power decrease year after year, the catch volume landed by the active Spanish fleet does not follow this same trend. This indicates that, on the one hand, **the least efficient fleet members tend to withdraw from fishing** and that, on the other hand, **due to reasons of power (restriction on kW) and tonnage (restriction on GT), the fishing effort control measure does not result in a decrease in catches**; therefore, it is necessary to use different effort control means, such as TACs and quotas, limitation of working days and temporary fishery closures, *inter alia*.



Graph - the right-hand vertical axis refers to weight landed by the Spanish fleet and the right-hand vertical axis refers to GT or kW [sic]

Finally, we can confirm that, in 2019, the Spanish government maintained its approach to structural adjustment of the country's fishing capacity through actions in the areas of management, competitiveness, diversification, monitoring and surveillance, helping to establish a fleet that is more closely aligned with fishing opportunities.

### B. SPANISH OPINION ON THE BALANCE BETWEEN FLEET CAPACITY AND FISHING OPPORTUNITIES

The Spanish government — with 8 007 active vessels operating in various fishing grounds, using different gears and with very different degrees of experience — faces enormous difficulties in devising indicators that define which strata of the fleet are in balance/imbalance, mainly because **greater disaggregation** would be required to do this. The creation of indicators by supra-regions

and fishing gear is so highly aggregated in the requested population that it does not provide a realistic view of the Spanish fleet. Therefore, Spain carries out a much more disaggregated segmentation of the population in the **Action Plan**.

However, indicators by supra-regions are created and they are evaluated in section H.

The general trend of the fleet in recent years would be:

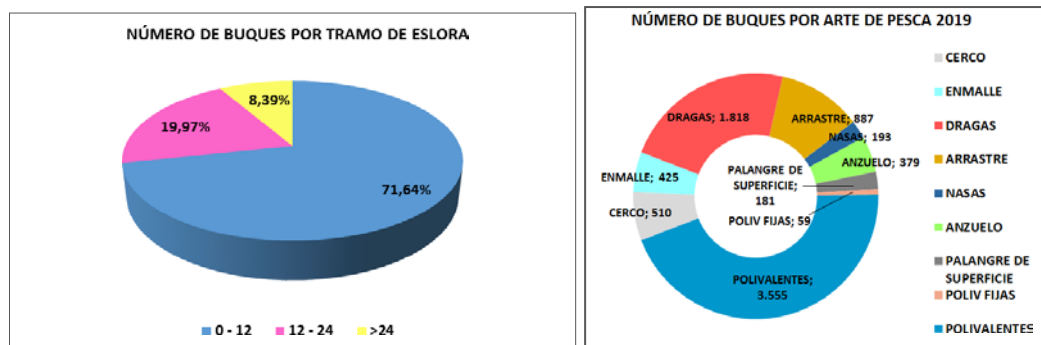
	Trend Active and Inactive 2016-2019			
	2016	2017	2018	2019
ACTIVE	8 354	8 295	8 050	8 007
INACTIVE	1 105	1 061	1 157	1 007
General Total	9 459	9 356	9 207	9 014

### C. STRUCTURE OF THE FLEET

#### i. Description of the fleet (Annex I) active in 2019

The Spanish fleet is largely **artisanal**, as 71.64% of vessels are under 12 metres in length, while 19.97% measure 12-24 metres and only 8.39% are over 24 metres in length.

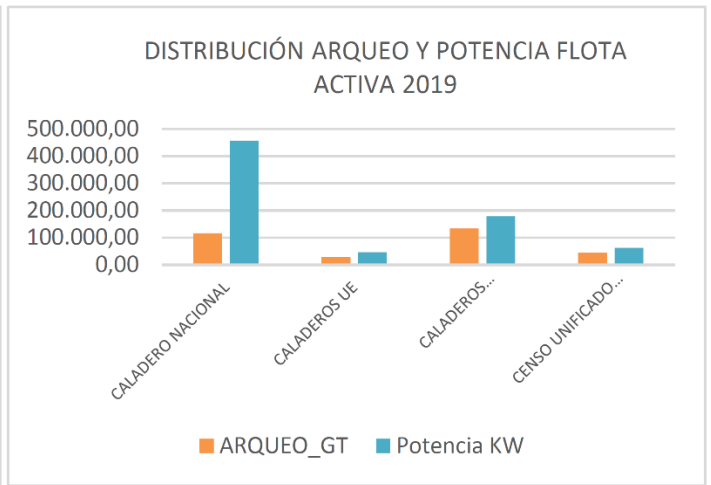
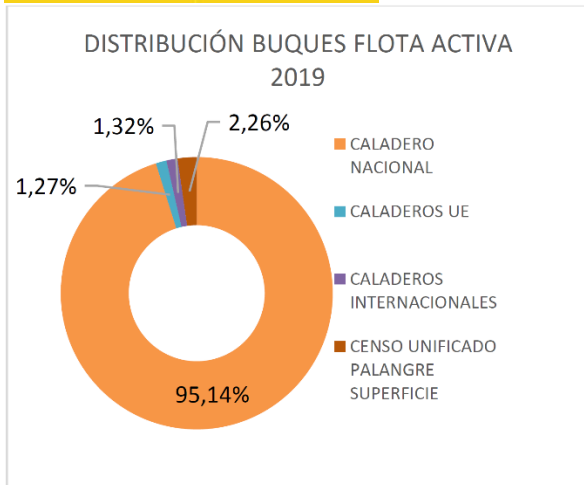
In 2019, the average **age** of the active Spanish fleet was 31 years. The artisanal fleet is the oldest (35 years), while the fleet of vessels measuring 12-24 metres is approximately 22 years old. Vessels measuring over 24 metres in length have an average age of approximately 19 years.



As regards **fishing techniques**, artisanal vessels using polyvalent gear account for 44% of the total, followed by vessels using dredges, which are mainly artisanal and dedicated to harvesting shellfish, and which account for 23% of the total. These are followed, to a lesser extent, by vessels using trawl nets (11%), purse seines (6%), hooks including surface longlines (7%) and gillnets (6%).

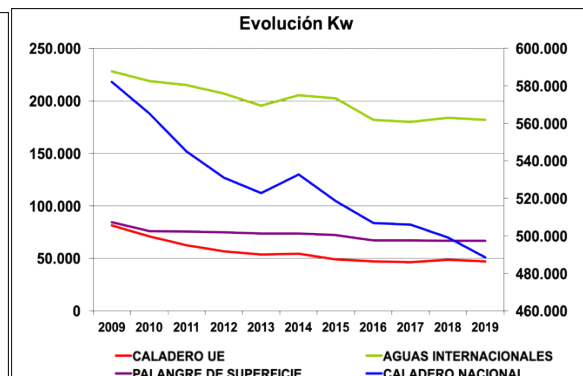
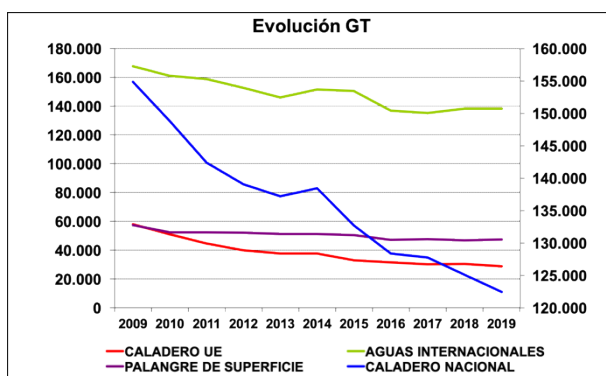
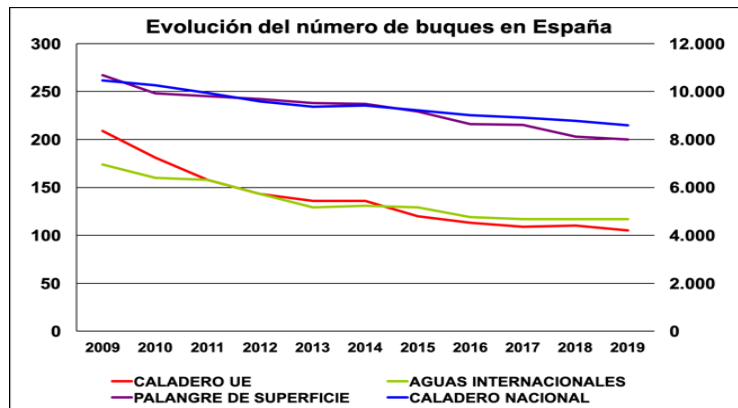
#### ii. Link with fisheries: management of fishing activity by the Spanish fleet (Annex II)

In total 95.14% of vessels fished in national fishing ground waters, corresponding to 35.97% of GT and 61.39% of kW. The remainder of the fleet is made up of the 102 vessels operating in EU waters (which account for barely 1.27% of the total fleet), and the fleet operating in international or third-country waters under bilateral arrangements, RFOs or private licences (1.32% of the total fleet), consisting mainly of bottom trawlers and freezer tuna seiners and accounting for 50.25% of the active fleet's total tonnage and 30.25% of its power. Finally, the Consolidated Register of Surface Longliners — which fish in the Atlantic, Indian and Pacific Oceans — comprises 2.26% of the fleet's vessels.



### iii. Trend in fleet and fishing activity (Annex III)

In general, the trend in the registered fleet is characterised by a marked reduction in capacity, whether this is measured in terms of number of vessels, GT or kW, as detailed below:



The right-hand vertical axis exclusively refers to national fishing ground data; the left-hand vertical axis refers to the other fishing grounds

In addition, analysis of the number of licenses that have been granted for carrying out fishing activity shows that they have decreased, which confirms this trend.

#### D. FISHING EFFORT SCHEMES 2019 (Annex IV)

Fishing capacity and effort are regulated in each fishery according to its particular characteristics. This is achieved through management or recovery plans, controls on fishing methods, maximum authorised periods of activity, closure periods and other technical requirements or restrictions placed on vessels (power, length, tonnage). Specific registers listing vessels authorised to fish have been established and TACs and quota regulations are enforced.

##### *i. List of fishing effort schemes*

The regulated closure periods are as follows:

TEMPORARY CLOSURES			
FISHING GROUND	GEAR	ZONE/SPECIES	DURATION
Gulf of Cádiz	Purse seine		From 1 December to 31 January
		Meagre ( <i>Argyrosomus regius</i> )	During April, May and June
	Trawl net		From 15 September to 30 October
	All	Octopus	From 1 May to 15 July
Cantabria and NW zone	Trawl net	Getaria	From 1 September to 31 December
		El Callejón and La Carretera	From 1 September to 1 March
		A Coruña-Cedeira	From 1 October to 31 January
	Bottom-set gillnet and fixed gillnet	Punta de la Vaca	From 1 November to 31 May
		From cardinal point 43°43'N - 005°51'W to 43°48'N - 005°51'W	From 2 March to 31 August
Set gillnet	From cardinal point 43°33'N - 004°30'W to 43°41'N - 005°07'W	From 1 January to 31 May	
Mediterranean	Trawl net	From Cubelles to the Gola Sur (Southern Arm) of the River Ebro	From 1 May to 30 June
		From the Gola Sur (Southern Arm) of the River Ebro to level with Almenara	From 1 July to 31 August
		From cardinal point 40°30'N - 1°30'E to 40°52'N - 1°26'E	From 1 June to 30 July
		From level with Almenara to Punta de la Escaleta	From 1 May to 31 May
		From Punta de la Escaleta	From 1 June to 30 June
		Murcia	From 18 May to 16 June
		Aesop shrimp in Cubelles	From 4 February to 5 March
		Aesop shrimp in Palamós	From 5 January to 5 March

	Purse seine	France and the mouth of the River Tordera	From 20 December to 19 January
		From the River Tordera to Torre Barona	From 4 December to 6 January
		From Torre Barona to Cubelles	From 20 December to 19 January
		From Cubelles to the River Senia	From 20 December to 16 February
		From the River Senia to the Gola del Perelló	From 1 December to 31 January
		Gola del Perelló	From 6 December to 5 January
		Region of Murcia	From 21 December to 19 January

In addition, there is a temporary closure for swordfish fishing in the Mediterranean Sea in place for all surface longliners from 1 January to 31 March.

Also, the EMFF may provide aid for measures aimed at the temporary cessation of fishing activities. In 2019, at the time of preparing this report and according to data recorded in apliFEMP information system, this aid has been forwarded to vessels that have stopped their activity due to the following closure periods:

TEMPORARY STOPPAGES FINANCED
Article 33(1)(a) of the EMFF Regulation. Management plan for purse seiners operating in the Gulf of Cádiz
Article 33(1)(a) of the EMFF Regulation. Ría de Nalón eel exploitation plan
Article 33(1)(c) of the EMFF Regulation. Management plan for fishing using mechanised dredges or trawl nets on the Mediterranean coast of Andalusia
Article 33(1)(c) of the EMFF Regulation. Management plan for bottom trawlers operating in the Mediterranean
Article 33(1)(c) of the EMFF Regulation. Management plan for purse seiners operating in the Mediterranean
Article 33(1)(c) of the EMFF Regulation. Management plan for surface longliners operating in the Mediterranean

The following is also established for the fleet operating outside European Union waters:

- ICCAT: a closure period for FADs for all purse seiners from 1 January to 28 February in 2020 and from 1 January to 31 March in 2021, throughout the area covered by the Convention.  
No drifting FADs can be installed during the 15-day period prior to the start of the closure.
- WCPFC: a closure period for FADs for all purse seiners from July to September between parallels 20° N and 20° S. In addition to the ban on fishing using FADs during April and May.
- IATTC: there is a closure period for fishing applicable to all purse seiners from 9 November to 19 January of the following year. There is also a special closure for tropical tuna fishing within the area between 96° and 110° W and between 4° N and 3° S, known as the “corralito”, from 9 October to 8 November of each year.

In addition, there is a temporary closure for swordfish fishing in the Mediterranean Sea in place for all surface longliners from 1 January to 31 March.

## ii. *Impact of fishing effort reduction schemes on capacity*

Over 2019, a total of 131 vessels were withdrawn from the active fishing fleet register and there were only 40 new registrations.

The effect of the temporary stoppages must be added to this, so that, taking into account the tonnage and power of the vessels that benefited from this aid and the number of calendar days that they remained moored in harbour, we can say that this aid enabled a decrease in fishing effort of 159 492.61 GT and 403 008.38 kW for 30 days in 2019.

In addition, in the case of trawlers and purse seiners in the Gulf of Cádiz, these stoppages enabled (once those in receipt of aid are removed) a decrease of 313 094.36 GT and 1 213 653.21 kW, with a reduction in effort of 60 days for purse seiners and 45 days for trawlers. Finally, it cannot be forgotten that the effort was reduced by 75 days for the entire octopus fishing fleet.

## E. STATEMENT OF COMPLIANCE WITH THE ENTRY-EXIT SCHEME AND REFERENCE LEVELS (Annex V) (Regulation (EU) No 1380/2013)

NATIONAL TOTAL (including the Canary Islands)	GT	KW
<b>FISHING CAPACITY LIMIT R138072013</b>	<b>423 550.00</b>	<b>964 826.00</b>
Withdrawn with public aid since 01/01/2014	24 963.39	57 689.89
<b>FLEET CAPACITY AS AT 31/12/2019</b>	<b>332 444.64</b>	<b>777 321.03</b>
Difference	66 141.97	129 815.08

SITUATION IN THE CANARY ISLANDS AS AT 31/12/2019						
CANARY ISLANDS	EU Waters [Length < 12 m]		EU Waters [Length > 12 m]		International and Third-Country Waters [Length > 12 m]	
	GT	KW	GT	KW	GT	KW
<b>FISHING CAPACITY LIMIT R138072013</b>	<b>2 617.00</b>	<b>20 863.00</b>	<b>3 059.00</b>	<b>10 364.00</b>	<b>28 823.00</b>	<b>45 593.00</b>
Withdrawn with public aid since 01/01/2014	20.58	143.64	0.00	0.00	0.00	0.00
<b>FLEET CAPACITY AS AT 31/12/2019</b>	<b>1 559.88</b>	<b>15 138.91</b>	<b>2 105.52</b>	<b>7 504.73</b>	<b>16 787.28</b>	<b>25 796.35</b>
Difference	1 036.54	5 580.44	953.48	2 859.27	12 035.72	19 796.65

## F. FLEET MANAGEMENT SYSTEM

### i. *Summary of the strengths, successes and weaknesses of the fleet management system*

#### Strengths and successes:

- IT improvements in data collection and consolidation: Improvement of the FLUX system and the system of algorithms for the completion of the Economic Data Call (DORI).
- The application of the General Register of the Fishing Fleet (*Registro General de la Flota Pesquera* - REGFLOP) in the Spanish Fishing Information System (*Sistema de Información Pesquera Español* - SIPE), increasing the information available and developing improvements in web services with the Merchant Marine and with the Social Marine Institute (*Instituto Social de la Marina* - ISM), which facilitates and streamlines the processing of administrative procedures relating to the General Register of the Fishing Fleet.
- The Register of Professionals in the Fishing Sector and the databases on Spanish graduates in third countries and of officers on board national vessels not using Spanish ports has been managed and administered.
- Categorisation of the different vessels of the Spanish fleet in the various fishing producer organisations and fishermen's guilds. In this way, a source of data necessary for compliance with the Common Fisheries Policy and, in particular, the Common Market Organisation has been obtained.
- The continuity of the annual Programme of Observers On Board Surface Longliners operating within the framework of the RFOs for Highly Migratory Species is worth special mention, with minimum observer coverage of 5% of the fishing effort in each of the pelagic longline fishing grounds.
- Sources of data on board the freezer tuna purse seiner fleet have been unified by updating the electronic log application to include data on fishing using FADs. Therefore, a reduction of errors in data collection is expected.
- In respect of the landing obligation, measures have been adopted including, *inter alia*, a Ministerial Order published in 2019, establishing the use at national level of mechanisms provided in European Union legislation.
- There are practically no areas of fishing activity without management measures, which contributes to the conservation and sustainability of fishery resources. In this respect, the principle of establishing quotas for fishing grounds and methods in Spain is contributing to maintaining the general stability of the fleet and, in turn, to the relative maintenance of the fishing effort.

#### **Weaknesses:**

- Some basic rules, in the form of Royal Decrees, need to be updated. In this respect, work is ongoing on a review and compilation of fishing rules.
- Some of the measures implemented in recent years in relation to the distribution of species quotas subject to TACs, especially for certain stocks in the Cantabria and NW zone, have not managed to ensure that our fleet is using them in a fully optimal manner.

On the issue of **engine power verification**, it has been noted that there are vessels that could operate with a higher power than that recorded in the register, primarily due to adjustments to their configuration or the removal of limiters; due to the complexity of the issue and the difficulty of detecting it, Spain is working on an agreement with the authorities of the Merchant Marine and the Autonomous Communities to enable the creation of a comprehensive and continuous programme of engine verification.



## **ii. Plan for improvements to the fleet management system**

- A **competitiveness strategy** for the fishing sector continues to be implemented, with actions incorporating funding instruments and actions in the areas of structural support, marketing, specific management and social support.
- We are continuing our policy of **changing the quota management model**, moving towards more individual or itemised distribution (ports, provinces, etc.). To that end, during 2019, a ministerial order has been drawn up establishing a mechanism for optimising their use, such as making transfers more flexible or establishing a mechanism for annual optimisation of quota use.
- Similarly, a ministerial order has been drawn up for the Mediterranean trawler fleet under the European Union plan for demersal resources in the Western Mediterranean.
- For recreational fishing, a **review of the management measures** currently in force in the Royal Decree of 2011 has been launched. This need arises from the current reality of this activity, with its enormous expansion in recent years, which requires improved data collection, as well as the implementation of new control measures.
- Development of the Engine Power Verification Plan

## **iii. Information on the general level of compliance with fleet policy instruments**

In general, Spain has a **high level of compliance with the provisions of the CFP**. One of the best examples is that already in 2019, all stocks exploited by Spain under the TACs and Quotas Regulation were already complying with the Maximum Sustainable Yield, according to the available scientific evaluations, one year earlier than foreseen by the CFP.

Council Regulation (EC) No 1224/2009 establishes that Member States shall ensure that the certified engine power is not exceeded. Commission Implementing Regulation (EU) No 404/2011, laying down detailed rules for the implementation of said Regulation, states that, for the purposes of **engine power verification**, Member States shall establish a sampling plan for the identification of those fishing vessels or groups of fishing vessels in their fleet for which there is a risk of under-declared engine propulsion power. Spain carried out this plan in 2014 and 2017 and is designing a programme for the continuous verification of engine power, in collaboration with the Autonomous Communities and the Ministries for Transport (Directorate-General of the Merchant Marine).

It can also be considered that it has been possible to resolve the palpable difficulties in the management of **the full application of the landing obligation**, with the rules and criteria adopted internally in Spain, which have made it possible to maintain the activity of the fleet without any great distortions in 2019. Thus, in four years of gradual implementation, Spain has made great efforts to adapt the rule and tools so that the fishing sector can continue its activity by recognising this new challenge:

- From a management point of view, the rule has been amended to allow the fleet to continue operation as it has done to date with the possibility of being able to use a battery of approved exception. Individual cost allocation has been chosen and a *de minimis* exception has been obtained for the most sensitive

species, the use of which is compulsory in all fishing grounds. The conditions associated with high survival have been established and SWAPS have been negotiated with other Member States to avoid bottleneck fisheries. Likewise, inter-species flexibility has been managed to give the fleet greater alternatives to continue its activity.

- All possibilities have been developed in the electronic fishing log so that the operator can document their activity and use of all possible exceptions.
- Training has been provided in person and by videoconference to both the sector and the inspectors, to improve their knowledge of the rule, which will help with both compliance and verification thereof.
- Using conventional means of inspection, the objective of monitoring compliance with the landing obligation has been given priority.

Work is currently underway to amend fishing legislation to enable, *inter alia*, the introduction of monitoring using REM systems.

In December 2019, the General Secretariat for Fisheries obtained the support of the Structural Reform Support Service (DG REFORM) to launch a technical assistance project based on the development of three systems based on new technologies, the latter of which is related to the implementation of REM circuits: the installation of Remote Economic Monitoring (REM), which will obtain information from CCTV and sensors installed on the vessels to detect possible non-compliance with the landing obligation, in accordance with the guidelines published by EFCA.

In respect of the **collection of data and scientific knowledge**, it is worth mentioning Regulation (EU) 2017/1004, which lays the foundations for Member States to define their national programmes and collect the variables allowing them to describe the fishing sector. In the case of Spain, the Ministry of Agriculture, Fisheries and Food participates in the national programme through the General Secretariat for Fisheries, which provides coordination and data on transversal variables, and the Unit responsible for statistics. Biological variables are collected by the Research Institutes: the Spanish Institute of Oceanography and the Fundación AZTI-Tecnalia. This means that the number of instances of non-compliance by the various end-users is practically negligible, in terms of both compliance with deadlines and the quality and quantity of data provided.

**Electronic Fishing Log:** By the end of 2019, there were 1 776 national vessels registered and reporting information in the electronic log application, which is used for the electronic exchange of information on fishing activity, notifications, landings, sales notes and transport documents. Thus, the Communications Centre handled a total of 2 643 586 messages during 2019, with the update of version 4 of the electronic log application (DEAv4) being noteworthy, providing major improvements for the fleet and for quality assurance in relation to the data sent via the vessel's electronic log application to the electronic log application communications centre in Madrid.

**Fisheries inspection and monitoring by the General Secretariat for Fisheries:** In 2019, a new Framework Agreement was signed on collaboration between the Ministry of the

Interior and the Ministry of Agriculture, Fisheries and Food, which established the actions to be taken in the areas of inspection, monitoring and support for the fishing fleet, which are making it possible to effectively handle the control of fishing quotas, fleet activity and the fight against illegal, unreported and unregulated fishing. This agreement includes the Maritime Service of the Guardia Civil (SERMAR), the Air Service of the Guardia Civil and the Nature Protection Service (SEPRONA).

Thus, in 2019, 8 617 inspections took place, of which 5 577 were performed in a port, 1 126 were performed at sea and 1 914 were performed in the air (sightings).

**Fisheries Satellite Monitoring Centre:** Throughout 2019, continuous satellite monitoring was carried out on 1 948 Spanish vessels operating in fishing grounds around the world. Likewise, the fisheries monitoring centre (FMC) handled a total of 9 900 000 messages via satellite, including messages both sent and received. Thanks to the information obtained via the Satellite Vessel Location System, and following the relevant investigations, the FMC issued 18 monitoring reports as a result of non-compliance with fishing regulations.

**Infringements and penalties:** In 2019, a total of 934 decisions on infringement proceedings in external water sea fisheries were issued, of which 845 imposed penalties. The majority of the infringement proceedings resulting in the imposition of penalties concerned **non-compliance with Article 100(2)(c) of Law 3/2001, of 26 March 2001, on state maritime fisheries** “Failure to complete the Fishing Log or landing declaration, or doing so by altering the data relating to catches, fishing effort or the geographical position of fishing operations or infringing the legislation in force”. Finally, just as in previous years, these figures show that the Fisheries Inspectorate and the Guardia Civil issued over 90% of the infringement reports.

## **G. INFORMATION ON CHANGES TO ADMINISTRATIVE PROCEDURES RELEVANT TO FLEET MANAGEMENT (Annex VI)**

During 2019, progress has been made in complying with Law 39/2015 on the Common Administrative Procedure for Public Administrations, which obliges legal entities to interact with the Public Administrations by electronic means in order to carry out any administrative procedure. Specifically, in the area of the fishing sector, the NOTIFICA platform is used to comply with this legal provision.

- During 2019, the amendment of the Royal Decree on fishing permits was carried out and we have formed part of inter-ministerial working group created for the transposition of *Council Directive (EU) 2017/159*; the legislative reforms necessary for Spain to ratify the Work in Fishing Convention, 2007, have been examined and a draft version of the legislation has been drawn up for approval.

Finally, it should be noted that 2019 was a year of intense regulatory activity in relation to fishery management, which is detailed in Annex VI and reflects the adjustments made and scrutiny exercised by the administrations in order to achieve the objectives of the CFP.

## **H. ASSESSMENT AND DISCUSSION OF INDICATOR BALANCE (Annex VII) – 2018 DATA**

The creation of indicators by supra-regions and fishing gear is so highly aggregated in the requested population that it does not provide a realistic view of the Spanish fleet. For example, evaluating the North Atlantic (NAO) trawlers measuring 24-40 m in length jointly

provides a very different result to that which would actually be shown if this trawler fleet were segmented into the four North Atlantic fishing grounds in which the Spanish fleet operates (Cantabria and the North-West, the Gulf of Cádiz, NAFO waters and EU-27 waters), which could give situations of balance or imbalance that are not really applicable to the whole trawler fleet operating in those waters. Therefore, Spain carries out a much more disaggregated segmentation of the population in the Action Plan.

Although Spain takes the data from the Action Plan as segments in balance/imbalance, below we will specify the economic, technical and biological indicators for the entire Spanish fishing fleet, segmented by supra-region. As indicated in the 2014 Guidelines and as explained in the Annex, we have taken a historical series of data from the last three years. For each year, based on the various indicators and their relative importance, an overall indicator for the year is created for each fleet segment; finally a weighted indicator is created for the last three years, giving a greater weight to the results of the last year.

\* The calculation of the economic (CR/BER and RoFTA), technical and biological (SHI and SAR) indicators is explained in Annex VII to this Report.

\*\* The calculation of the Overall Indicator and Weighted Average for the years 2016-2017-2018 is also detailed in Annex VIII to this Report.

### **NORTH ATLANTIC**

As regards the data obtained, taking into account the new requirements laid down in Commission Implementing Decision (EU) 2016/1251 of 12 July 2016 adopting a multi-annual Union programme for the collection, management and use of data in the fisheries and aquaculture sectors for the period 2017-2019, both Morocco (34.1.1) and the Canary Islands (34.1.2) have become part of the North Atlantic supra-region.

SUPRA-REGION CLUSTER DC	ACTIVE			INACTIVE		
	VESSELS	TOT_GT	TOT_KW	VESSELS	TOT_GT	TOT_KW
<b>NORTH ATLANTIC</b>	5 764	121 711.65	342 797.02	731	8 093.24	23 556.11

	Stratum	Length	CR/BER			RoFTA (%)			TECHNICAL 220			SHI			SAR			OVERALL INDICATOR			Weighted Average**	No of vessels		
			2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016-2018	2016	2017	2018
North Atlantic	DTS	3	2.81	3.99	2.61	165.5	39.93	53.74	0.82	0.8	0.81	< 40%	<40%	<40%				3	3	3	3	66	66	63
		4	4.01	2.76	4.49	303.37	81.37	92.36	0.88	0.83	0.84	< 40%	< 40%	< 40%				3	3	3	3	74	75	75
		5	3.42	2.4	1.14	72.24	73.59	6.95	1.19	1.18	1.18	1.35	1.21	1.32				2	2	2	2	107	108	102
		6	3.56	3.07	1.53	625.05	306.34	28.16	0.95	1.09	0.81	0.81	0.98	1.54		COD	COD		3	3	2	2	17	13
	PS	2	5.08	-1.42	1.08	129.58	-84.68	1.85	0.45	0.43	0.39	< 40%	< 40%	< 40%	HOM			3	1	2	1	20	18	19
		3	7.23	3	2.42	132.38	85.42	58.5	0.71	0.65	0.6	< 40%	< 40%	< 40%				3	2	2	2	116	112	108
		4	5.4	1.96	1.64	82.08	48.16	16.35	0.87	0.81	0.73	< 40%	< 40%	< 40%				3	3	3	3	99	101	97
		5	9.75	4.12	4.07	146.08	82.53	86	0.84	0.83	0.74	< 40%	1.32	0.73	HOM			3	2	3	3	57	81	87
	DFN	2	16.01	0.66	3.23	169.75	-12.24	78.9	0.71	0.68	0.63	< 40%	< 40%	< 40%				3	1	2	2	106	115	119
		3	3.89	4.33	1.1	54.88	92.99	2.74	0.84	0.82	0.8	< 40%	< 40%	1.28				3	3	2	2	145	139	153
		4	0.79	1.82	1.26	-10.36	21.07	9.86	1.01	1.01	0.94	1.64	1.44	1.48				1	2	2	2	23	25	31
	HOK	2	3.74	1.08	5.6	145.65	2.38	138.14	0.51	0.47	0.44	< 40%	1.4	1.37				2	2	2	2	64	63	69
		3	4.12	3.58	2.46	41.19	81.07	38.79	0.75	0.68	0.63	1.36	1.27	1.36				2	2	2	2	74	81	73
		4	1.71	2.06	-0.23	15.31	43.76	-33.24	0.89	0.86	0.74	1.11	1.03	0.97				2	2	1	2	33	29	26
		5	13.14	15.38	2.86	253.8	152.18	25.63	0.79	0.77	0.58	0.63	0.81	0.76				2	3	3	2	50	25	16
	HOK-LLD	4	8.75	10.29	1.79	292.5	272.27	27.34	1	0.99	0.94	< 40%	0.91	0.84				3	3	3	3	12	11	9
		5	3.95	2.97	2.54	60.58	54.31	38.78	1.33	1.38	1.39	< 40%	< 40%	< 40%				3	3	3	3	33	30	32
	FPO	2	7.35	3.44	2.31	51.4	60.43	44.43	0.77	0.71	0.69	< 40%	< 40%	< 40%				3	3	2	3	71	71	77
		3	5.43	6.4	0.86	26.14	65.07	-5.78	0.78	0.69	0.74	< 40%	< 40%	< 40%				3	2	1	3	56	58	52
	DRB	1	11.56	1.96	5.41	93.28	12.69	46.35	0.5	0.54	0.52	< 40%	< 40%	< 40%				2	2	2	2	1 731	1 814	1 611
		2	14.45	2.69	4.52	89.83	27.85	17.5	0.54	0.47	0.26	< 40%	< 40%	< 40%				3	2	2	2	14	14	16
		3	4.12	2.24	2.69	42.87	18.3	18.05	0.57	0.47	0.27	< 40%	< 40%	< 40%				3	2	2	2	84	84	83
	Polyvalent gear	1	2.52	3.1	3.48	32.57	41.46	88.99	0.5	0.46	0.44	< 40%	< 40%	< 40%				2	2	2	2	2 043	1 954	2 106
2		1.97	6.2	7.26	18.56	199.13	62.01	0.52	0.48	0.46	< 40%	< 40%	< 40%				2	2	2	2	70	60	40	
3		6.44	2.59	1.38	51.37	41.88	13.99	0.82	0.81	0.61	1.11	1.07	1.05				2	2	2	2	47	42	28	
Passive Gear	5	3.35	2.19	1.56	164.86	92.39	34.76	1.23	1.31	1.29	0.96	0.79	0.81				3	3	3	3	56	55	59	

## **NORTH ATLANTIC INDICATORS**

**TRAWLERS:** The trawler fleet is made up of 138 vessels, 15 of which are inactive. The 0-18 m and 18-24 m segments include 141 vessels operating in the national fishing grounds, mainly in the Gulf of Cádiz (IXa); they remain in the same good economic situation reported in 2016, with good short- and long-term profitability. The technical indicator shows a slight imbalance and the composition of its catches does not allow for evaluation of the SHI indicator (they do not amount to 40% of the stocks under study). They also do not fish for SAR species. The overall situation is one of balance.

The 24-40 m segment includes 102 vessels, trawling in the Cantabria and NW zone (28.VIIIc) as well as in Portuguese (IXa) and EU (ICES 27 VI, VII, VIII abde) waters; they are balanced both economically and technically, but the SHI shows dependence on overexploited stocks of blue whiting, Atlantic mackerel, hake 27 8c9a and Norway lobster. This indicator shows an imbalance in 2018.

The vessels measuring over 40 metres in length include 15 cod-fishing vessels and the NAFO fleet, show good profitability, with a higher occupation of the fishing ground and, for the first year, they depend on overexploited species (redfish 2127) and over 10% of their catch is cod species 27.1, which has been determined to be at high risk. This indicator shows an imbalance in 2018.

Therefore, *in the North Atlantic trawler fleet, only one imbalance due to biological causes is observed, among vessels measuring over 24 metres in length*; however, given the variability of fisheries that are intertwined in this segment, it is not possible to know to which of them the imbalance is attributed. Thanks to the action plan carried out, in which the trawler fleet in the national fishing grounds (separating the Cantabria and NW zone from the Gulf of Cádiz), the EU waters trawler fleet and the fleet operating in other North Atlantic waters are evaluated separately, it is possible to determine situations of balance/imbalance for the various fishing grounds in the North Atlantic.

**PURSE SEINERS:** This fleet includes 311 vessels operating exclusively in the waters of the national fishing grounds (27.8c and 9a); the 10-12 m segment, composed of 19 vessels, has improved its economic results compared to 2017, since last year the statistical data were erratic, as the real landing value of these vessels did not correspond to the statistical data. A deterioration can be seen concerning the RoFTA, due to an increase in statistical fixed costs in 2018. The occupation of the fishing grounds is imbalanced, which is typical of the artisanal fleet. This fleet does not depend on SHI species or SAR species, but its overall indicator shows a slight imbalance.

The 12-18 m segment includes 108 vessels and is maintaining good profitability; the technical indicator shows a low fishing ground occupation

intensity, this segment does not depend on over-exploited stocks or SAR stocks and its slight imbalance is attributed to the low occupation of the fishing grounds, which is typical of the artisanal fleet.

The 18-24 m segment is showing a good economic situation, with a slightly imbalanced occupation of the fishing ground; it does not depend on over-exploited species and its indicator shows a balance. The 24-40 m segment is showing good economic profitability, a slightly imbalanced occupation of the fishing ground and, despite its dependence on over-exploited stocks in 2017 (sardines), in 2018 this indicator is in balance due to the strong improvement of the pil-27.8abd, as notified by the STECF

**FLEET USING GILLNETS:** Composed of 303 vessels; the 10-12 m segment includes 119 vessels using small-scale gear operating in the Cantabria and NW zone (miño nets, beta nets, trasmallo nets, etc.), which are improving in profitability, possibly due to a survey error in 2017, meaning that, despite low occupation of the fishing ground and not depending on overexploited species or SAR species, its indicator shows a balance. The 12-18 m segment includes 153 vessels; its economic situation is still very good and the occupation of the fishing ground is acceptable and dependent for the first year on over-exploited species (hake and mackerel), placing it in a slight imbalance. The 18-24 m segment includes 31 vessels, its good economic profitability continues to depend on overexploited stocks (hake and mackerel) and its overall indicator shows a slight imbalance.

**FLEET USING HOOKS:** 184 vessels operating in the waters of the national fishing ground, where all strata show good economic performance in both the short and long term, with the exception of the 18-24 m segment (26 vessels, mainly bottom-set longliners in the Cantabria and NW zone), due to low statistical incomes that do not correspond to the reality of the value landed.

In respect of the use of the fishing ground, the 10-12 m, 12-18 m and 24-40 m segments are worse than the previous year, with low use of the fishing ground, and the 24-40 m segment continues to show a slight imbalance.

Biologically, the fleet of vessels measuring up to 18 metres in length continues to depend on over-exploited species (Atlantic mackerel and Southern hake). Vessels measuring over 18 metres in length are not dependent on over-exploited species. No vessels depend on SAR species.

The 2018 overall indicator shows a biological imbalance for the segment of vessels measuring up to 18 metres in length, a clear imbalance for those measuring 18-24 metres in length and a balance for those measuring 24-40 metres in length.

**FLEET USING PASSIVE GEAR (PGP):** The passive gear fleet in ICES zones and bottom-set longliners (27 VIII abde), which show very good profitability and no dependence on overexploited stocks, with optimum fishing ground occupation; they do not depend on overexploited species or SAR species as they mainly fish for Northern hake, resulting in an indicator in total balance.

**FLEET USING POTS (FPO):** In which the occupation of the fishing ground by the 10-12 m segment is worse, which is normal in artisanal fleets,

while the economic conditions for the 12-18 m segment are worse, due to a decrease in statistical incomes not corresponding to reality; as they do not depend on SHI or SAR species, they are considered to be in balance.

**FLEET USING TRAWL NETS AND DREDGERS (DRB):** 1 710 artisanal vessels, dedicated to shellfish harvesting and dredging for striped venus in the Gulf of Cádiz, with good short- and long-term profitability and low occupation of the fishing grounds, like most of the artisanal fleet, and as they do not depend on SHI or SAR species, they are considered to be in balance.

**FLEET USING POLYVALENT GEAR:** 2 174 small vessels, which show an improvement in their economic indicators, although the technical indicator is in imbalance, which corroborates the STECF reports that, since 2015, have been reiterating that a low occupation of the fishing grounds (technical imbalance) in the artisanal fleet cannot be attributed to an imbalance between capacity and opportunity, given its part-time occupation. Biologically, the 12-18 m segment shows a slight dependence on over-exploited species, as in previous years (Southern hake and mackerel). The overall indicator for the 12-18 m segment in the PMP stratum shows a slight biological imbalance.

#### INDICATORS FOR THE NORTH ATLANTIC, CANARY ISLANDS AND MOROCCO

	Stratum	Length	CR/BER			RoFTA (%)			TECHNICAL 220			SHI			SAR			OVERALL INDICATOR			Weighted Average**	No of vessels		
			2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016-2018	2016	2017	2018
Canary Islands	PS	3		2.61	4.78		156.9	78.27		0.6	0.58		< 40%	< 40%					2	2	2		16	16
		2		7.24	3.19		173.1	81.72		0.29	0.3		0.71	0.58					2	3	3		43	44
	HOK	3		6.6	1.77		136.2	21.95		0.6	0.52		0.83	1.08					2	2	2		27	30
		5		0.36	-0.77		-30.42	-53.25		0.9	0.92		1.02	1.42					2	1	1		22	25
	PMP	1		0.91	-2.96		-4.5	-87.2		0.35	0.35		< 40%	< 40%					1	1	1		485	459
FPO	2		0.45	2.12		-39.56	35.3		0.45	0.34		< 40%	< 40%					1	2	2		12	16	
MA	HOK	3		4.06	-5.04		29.18	-56.15		0.88	0.41		< 40%	< 40%					3	1	1		19	8



## **CANARY ISLANDS**

The purse-seiner fleet measuring 12-18 m in length, formed of 16 vessels, shows good economic results, does not depend on overexploited species and has an overall indicator that is in balance. The fleet using hooks measuring 10-12 m (44 vessels) and 12-18 m (30 vessels) in length show good profitability; they depend on bigeye tuna, a species that is slightly overexploited, meaning that the 12-18 m segment has a slight imbalance; the 24-40 m segment (25 vessels) shows a low profitability for the second year, in both the short and long term, with increasing dependence on bigeye tuna, which shows a clear imbalance.

## **MOROCCO**

The fleet operating mostly in 34.1.1 was formed in 2018 of 8 vessels mainly using hooks, with lengths ranging from 12 m to 18 m. Due to the closure of the agreement, with losses in income of almost 89% compared to the previous year, this fleet has had very poor economic profitability and a technical imbalance; however, biologically, it does not depend on SHI or SAR species. The overall indicator for this fleet for this year is in imbalance.

## MEDITERRANEAN

SUPRA-REGION CLUSTER DC	ACTIVE			INACTIVE		
	VESSELS	TOT_GT	TOT_KW	VESSELS	TOT_GT	TOT_KW
<b>MEDITERRANEAN</b>	2 092	50 802.05	196 222.63	406	3 357.27	19 474.58

			* CR/BER			RoFTA (%)			TECHNICAL 220			SHI			SAR			OVERALL INDICATOR			Weighted Average **	No of vessels			
	Stratum	Length	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016-2018	2016	2017	2018	
Mediterranea	DTS	2	9.14	1.85	2.51	62.63	41.88	49.23	0.73	0.60	0.60	< 40%	< 40%	< 40%				3	2	2	2	19	18	17	
		3	5.38	2.57	3.27	73.14	64.12	84.98	0.86	0.85	0.86	< 40%	< 40%	< 40%				3	3	3	3	147	147	146	
		4	3.75	1.91	1.96	47.81	38.86	47.33	0.92	0.91	0.92	3.96	4.08	3.57				2	3	2	2	301	303	292	
		5	3.19	1.32	1.21	45.30	15.79	9.88	0.95	0.91	0.93	4.12	4.25	3.26	HKE			2	3	2	2	130	132	126	
	PS	2	9.11	30.89	0.46	107.68	194.05	-29.40	0.72	0.68	0.61	< 40%	< 40%	1.35				3	2	1	2	20	18	16	
		3	3.65	3.25	1.83	70.70	62.72	42.00	0.97	1.00	0.97	1.74	1.54	1.47	PIL			2	2	2	2	85	84	73	
		4	4.02	2.26	2.90	49.02	42.97	64.80	1.06	1.04	1.02	1.67	1.55	1.47	PIL			2	2	2	2	86	88	79	
		5	2.56	2.78	5.15	100.25	115.34	175.47	0.51	0.55	0.51	0.96	0.83	0.77	PIL			2	2	2	2	25	26	26	
	DFN	2	3.54	1.28	1.47	64.24	10.57	7.55	0.69	0.68	0.61	< 40%	< 40%	< 40%				3	2	2	2	84	85	89	
		3	1.41	1.55	0.83	21.20	27.85	-7.06	0.79	0.77	0.75	< 40%	< 40%	< 40%				3	3	1	3	54	53	58	
	HOK	2	13.17	-0.49	2.08	221.16	-57.99	33.94	0.54	0.44	0.37	< 40%	< 40%	< 40%				2	1	2	2	52	47	36	
		3	3.52	3.80	1.46	12.79	40.66	22.45	0.58	0.57	0.43	< 40%	2.09	0.83				2	2	3	2	21	23	26	
	HOK-LLD	3	5.26	1.88	1.79	87.83	41.44	58.20	0.68	0.66	0.67	1.55	1.60	1.71		SWO	SWO	2	2	2	2	44	42	31	
		4	2.67	1.99	2.94	42.13	45.31	68.49	0.81	0.80	0.82	1.66	1.54	1.72		SWO	SWO	2	2	2	2	21	22	21	
	FPO	2			0.20			-39.85			0.59			< 40%							1	1	0	0	21
		3	6.16	1.55	1.42	318.41	26.17	26.89	1.14	0.98	1.14	< 40%	< 40%	< 40%				3	3	3	3	24	31	23	
	DRB	2	1.11	1.16	-9.33	3.19	7.66	-69.54	0.43	0.44	0.35	< 40%	< 40%	< 40%				2	2	1	1	18	39	56	
		3	3.01	1.11	-1.68	22.93	1.74	-61.67	0.88	0.77	0.80	< 40%	< 40%	< 40%				3	2	1	1	14	14	13	
	Polyvalent gear	1	3.31	15.51	36.60	32.64	267.14	-73.11	0.33	0.34	0.34	< 40%	< 40%	< 40%				2	2	1	2	109	109	100	
		2	8.69	1.32	1.40	126.67	15.29	24.50	0.51	0.50	0.43	< 40%	< 40%	< 40%				2	2	2	2	951	913	829	
3		3.22	1.77	1.26	52.49	11.59	5.90	0.86	0.80	0.53	3.21	3.57	< 40%	PIL			2	2	2	2	32	34	14		

The situation concerning the stocks in this fishing ground has triggered the start of a joint action plan for the Mediterranean Sea. In 2018, 136 vessels stopped fishing compared to the previous year, which means a reduction in capacity of around 3 300 GT and 14 000 kW, and 406 vessels were inactive, 71 more than the previous year.

In general, operational capability is low, mainly due to the fact that much of the fleet operates part-time, thereby decreasing the technical indicator, which is practically in imbalance across the whole fleet.

**TRAWLERS:** 591 vessels, 19 fewer than in 2017, which improve the economic situation; however, the high dependency on overexploited stocks creates an imbalance for trawlers over 18 m in length, mainly due to ARA, DPS, HKE, MUT and NEP in GSA 06, and DPS and HKE in GSA 01. The 18-24 m and 24-40 m segments show a biological imbalance.

**PURSE SEINERS:** (194 vessels) The 6-12 m segment shows poor economic results due to an increase in both fixed and variable costs; it is in an imbalance technically and, for the first year, depends on overexploited species (sardines in GSA 01 and 06 and hake in GSA 01), meaning that this segment is in imbalance in 2018.

The 12-18 m and 18-24 m segments show a lower biological imbalance (in relation to 2017), again due to sardines, both in GSA 06 and GSA 01, and ANE in GSA 06, although this year it does not depend on SAR species. A biological imbalance is noted.

The 24-40 m segment shows very good indicators and does not depend on at-risk biological species; however, due to the inclusion of the six purse seiners targeting bluefin tuna that fish very few days to obtain their quota (13 days per year on average), the technical indicator is the only one in imbalance. We can consider this segment to be in balance.

**FLEET USING GILLNETS:** Formed of 147 vessels measuring up to 12 m in length, it maintains a good economic situation. The technical indicator shows an inefficient occupation of the fishing ground, which is typical of an artisanal fleet. The economic indicators of the 12-18 m segment are drastically worse due to an increase in fixed costs, which will have to be observed next year to see if it is due to a statistical error, together with a slight imbalance of the technical indicator. None of the strata depends on overexploited stocks studied.

**FLEET USING HOOKS:** 62 vessels belonging to the bottom-set longline and small-scale gear fleet, 11 fewer than the previous year; the economic indicators for this year are in balance; a technical imbalance remains, as it is an artisanal fleet. The 12-18 m segment, which was in imbalance in 2017 due to NEP, ARA and WHB in GSA06, shows balance in 2018, as catches of HKE in GSA 6 and of MUT, etc. have decreased to a large extent. It shows no dependence on SAR stocks. In 2018, based on its overall indicator, due to the fact that the imbalance is due to the low occupation of the fishing ground by the artisanal fleet, it is considered to be in balance.

**FLEET USING TRAWL NETS AND DREDGERS:** 69 vessels, 17 more than the previous year, were fishing using polyvalent gear and which, for the first year, show an economic imbalance and a very low level of use of the fishing grounds, which has worsened compared to 2018, probably due to the increase in the number of vessels. This fleet does not depend on overexploited stocks or SAR species and therefore has biological indicators that show an imbalance. Due to the economic imbalance, this year both the 6-12 m and 12-18 m segments became imbalanced.

**FLEET USING POTS:** This fleet includes 44 artisanal vessels that fall into the 6-12 m segment, with low occupation and very poor profitability and, despite not depending on SHI and SAR species, this segment is in balance. The study of the 12-18 m segment shows that all of its indicators are in balance.

**FLEET USING POLYVALENT GEAR:** The 0-6 m segment (100 vessels) shows a strong imbalance, due to the fact that the statistics attribute to it catch values 50% lower than the real values while, in addition, the statistics for 2017 were higher than the real values; the very low occupation of the fishing ground means that this fleet is in imbalance. The 6-12 m segment (819 vessels) only shows low fishing ground occupation (balanced) and the 12-18 m segment is economically profitable and in this year it does not reach the 40% of the species being studied for the SHI, so it only shows a technical imbalance).

**SURFACE LONGLINERS:** In 2018, 52 vessels fished, 12 fewer than the previous year, maintaining good short- and long-term profitability, with slightly improved fishing ground occupation, but increasing their dependence on swordfish, an SAR species, which maintains their imbalance.

## OTHER FISHING REGIONS

SUPRA-REGION CLUSTER DC	ACTIVE			INACTIVE		
	VESSELS	TOT_GT	TOT_KW	VESSELS	TOT_GT	TOT_KW
<b>OFRs</b>	194	149 249.46	205 280.50	20	7 613.61	11 004.53

			CR/BER			RoFTA (%)			TECHNICAL 220			SHI			SAR			OVERALL INDICATOR			Weighted Average *	No of vessels		
	Stratum	Length	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016-2018	2016	2017	2018
Other Regions	DTS	5	2.87	1.01	-0.39	112.40	0.76	124.48	1.30	1.24	1.23	< 40%	< 40%	< 40%				3	3	2	2	40	41	40
		6	1.89	2.30	3.39	160.97	198.13	177.53	1.24	1.30	1.15	< 40%	< 40%	< 40%				3	3	3	3	30	33	31
	PS	6	2.30	2.32	1.51	61.78	100.37	50.52	1.46	1.36	1.33	0.97	0.98	1.07			YFT	3	3	2	3	26	26	26
	HOK	5	3.03	4.78	3.92	79.86	170.63	162.57	1.12	1.01	1.19	0.93	1.01	< 40%				3	3	3	3	25	12	14
	HOK-LLD	5	2.83	2.16	0.74	96.66	62.74	-17.95	1.38	1.45	1.41	< 40%	< 40%	< 40%				3	3	2	3	64	62	58
		6	1.88	2.53	2.11	90.02	65.50	47.06	1.52	1.41	1.53	< 40%	< 40%	< 40%				3	3	3	3	23	25	25

**TRAWLERS:** 71 trawlers operate in OFRs, with 8 remaining inactive, probably due to the lack of agreements. Those measuring 24-40 m in length fish mainly in the area 34 FAO in agreement with Morocco and Guinea Bissau and their economic situation has worsened due to a sharp loss of income. There is no biological indicator due to lack of studies and they do not depend on SAR species. Economic imbalance in 2018. However, we must be cautious with this fleet which fluctuates based on the agreements and private licences that are granted.

The segment of vessels measuring over 40 m in length, large NAFO area trawlers fishing in the South Atlantic and large international trawlers in area 34, maintains its good economic situation and fishing ground homogeneity. The fact that it does not depend on SAR or SHI species, and its good economic results, mean that this fleet is in balance.

**PURSE SEINERS:** The 26 freezer tuna seiners that fished in 2018 continue to show good short- and long-term profitability. The technical indicator remains in balance. For the first year, they depend slightly on overexploited stocks, (AO-BET, IO-YFT and IO-ALB), with YFT-IO, a

species that accounts for over 10% of their catches, being considered high risk; therefore, they show biological imbalance.

**FLEET USING HOOKS:** With 14 vessels, this fleet shows good medium- and long-term profitability, as well as good occupation. This fleet showed a slight biological imbalance in 2017, depending on an overexploited stock, bigeye tuna; however, in 2018, catches of this species decreased by over 50% in volume. Therefore, this is a segment in balance.

### **SURFACE LONGLINERS**

The consolidated register of surface longliners has been analysed in terms of the fishing supra-regions: the North Atlantic Ocean (41 vessels), the Mediterranean Sea (52 vessels) and other regions (Central and South Atlantic, Pacific and Indian Oceans), in which 83 vessels operated in 2018, are analysed in this section.

The profitability of the 24-40 m segment (58 vessels) of this fleet has worsened from the good profitability of previous years, with an increase in fixed costs and a loss of income. This segment shows a homogeneous and balanced technical capacity and does not depend on overexploited stocks or SAR species; its economic development should be observed.

The situation for the segment of vessels measuring over 40 m in length (25 vessels) is one of complete balance.