DEPARTEMENT
LANDBOUW & VISSERIJ

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ANNUAL FLEET REPORT 2019 – Belgium

'Sustainable balance between fishing capacity and fishing opportunities'

31.5.2020

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Compiled by:
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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

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1 SUMMARY

A) Conclusion

In 2019 the capacity of the Belgian fleet increased slightly by 138 kW and 16 GT compared with 2018. This increase is rather arbitrary as two of the three fishing vessels that left the fishing fleet in 2018 still had their capacity in kW and GT in order for a replacement vessel to be introduced into the fleet. One fishing company made use of this capacity in 2019. The increase in 2019 is therefore the logical consequence of the excessive, arbitrary decrease in 2018. In general, the Belgian fishing fleet has decreased sharply, by a total of 37% in kW terms and 47% in GT terms compared with the 2003 reference level. Fishing capacity is thus also well below the reference levels (Table 4.1). There were 68 fishing vessels at the end of 2019.

In 2019, the current reporting year, the same method was used to calculate indicators as in previous reporting years.

The 2010-2019 summary contained 14 possible fleet segments (Table 7.1). On the basis of the number of segments in 2019, 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 TBB18-24 and TBB24-40 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 DTS24-40 and PMP18-24 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 clearer that the applicable final assessment is 'in balance'. On the basis of the full range of indicators, it may therefore be concluded that TBB18-24 and TBB2440, 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 2019.
2. Size of the fleet:
   68 fishing vessels: 12,914 GT and 42,808 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 (2,347 tonnes)
     - plaice (5,418 tonnes)

   See Section 2.1 for details.
4. Number of changes in fleet capacity:
   5. 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 2019 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 2018 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 2018 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 fishermen 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). Moreover, every effort must be made to find viable solutions in order to fully implement the landing obligation. This still remains problematic and particularly risky in these highly mixed fisheries despite the lessons gradually learned over previous years. Lastly, Brexit is causing a great deal of uncertainty in the sectors and requires particular attention.
- Is this likely to improve the financial situation of the fleet?
  Economic results will depend primarily on the fishing opportunities: the available quotas combined with fish and fuel prices. The full introduction of the landing obligation and the prospect of Brexit are making it too difficult to carry out more in-depth analysis. The economic results in recent years have remained very positive following the sharp increase in 2015.
- 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 under the EMFF. The continuation of the accelerated sustainable transition of the fleets as regards energy efficiency, selectivity and survival has been significantly delayed both by the restrictions imposed by the EMFF and by the uncertainties resulting from increasing implementation of the landing obligation and Brexit. It is regrettable that no funding is available to replace the outdated fleet with new, environmentally and economically sustainable fishing vessels. In the longer term, it is essential that such funding is provided in order to ensure that the sector is balanced and performs well.

- 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. Similar energy-efficiency actions, such as engine replacement under the EFF, are no longer practicable under the EMFF. This is in stark contrast to the absolute need and the objectives of both economic performance and reduced environmental impact. Those objectives are still as critical, but the impetus of actions which stimulate or expedite change has completely disappeared or is no longer possible in the context of Belgium. Nevertheless, the objectives are at the heart of the CFP.
- 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. After a gradual introduction in order to adapt the existing systems, the implementation of the obligation is now entering a crucial phase. A number of stocks accounting for a large volume of the catch composition will be introduced in 2018-2020. These include, in particular, the choke species: species which do not determine the type of fishing activity but which do present a high risk of seriously and problematically preventing or even stopping the overall activity.
  The toolbox measures which have for years been proposed to limit this effect have been found to be very difficult to administer and in some cases even impracticable. This real divergence between the legislative framework and good practice will have to be addressed soon if it is not to lead to undesirable situations.

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

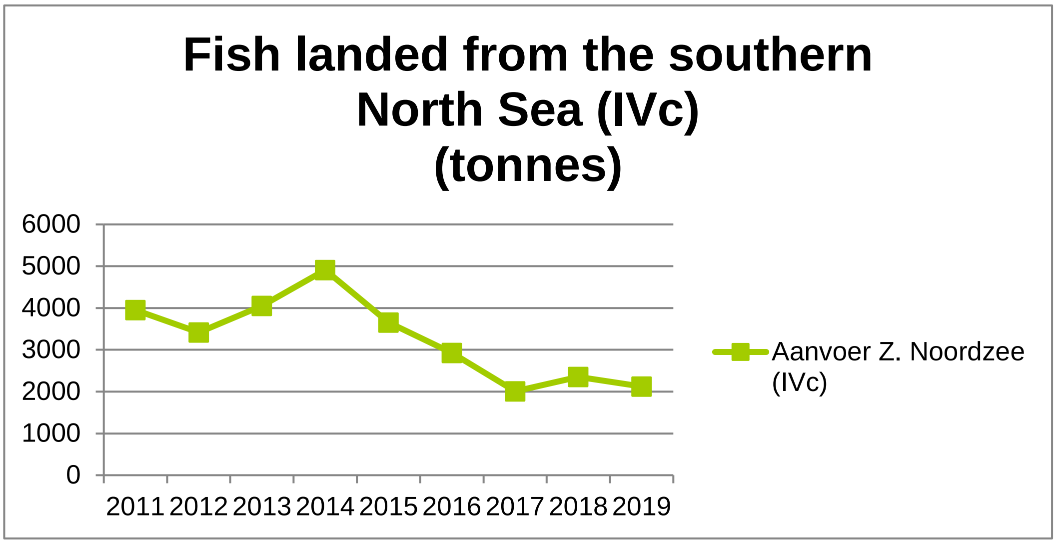
2 SECTION A

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 the remaining group 'other fishing' (consisting of static gear, dredge and seine fishing). Most fish is landed from the North Sea (IVb,c, 45%), the English Channel (VIIde, 28%), the Celtic Sea (VIIfg, 17%), 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 45%, 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, in particular as a result of the pulse, will have to be further examined.

Table 2.1 Overview of Belgium's main fishing activities in 2019			
Fishing method	Days at sea (%)	Landings (%)	Value (%)
Beam trawl	59.5	70.9	74.8
Otter trawl	9.4	10.3	8.3
Dredges	1.2	1.5	0.8
Shrimp	13.9	4.3	3.4
Nephrops	11.8	8.0	8.6
Passive	2.0	0.5	0.6
Seine	2.3	4.5	3.5
Total	13,418	19,309 tonnes	€80,819,000
Zone	Days at sea (%)	Landings (%)	Value (%)
IVb,c	48.0	45.1	38.5
VIId,e	24.9	28.2	25.6
VIIf,g	16.4	16.6	21.1
VIIa	4.6	5.8	7.6
VIIIa,b	4.3	2.9	5.1
Other	1.7	1.5	2.2



On 31 December 2019 the Belgian fishing fleet consisted of 68 vessels. Broken down by segment, 32 vessels had engine power of more than 221 kW (large fleet segment, LFS) and 36 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 28 years for the large fleet segment and 36 years for the small fleet segment.

Table 2.2 Breakdown by fleet segment for Belgium in 2019

Segment		Number
SFS (<=221 kW)	Coastal fishing boats	14
	Eurocutters	15
	Other	7
LFS (>221 kW)	Large beam trawlers	27
	Other	5
Total		68

19,309 tonnes of fishery products were landed in 2019 (see Table 2.3). Of those, 13,754 tonnes were landed in the Belgian ports of Zeebrugge (8,001), Ostend (5,351) and Nieuwpoort (402).
The remaining 5,555 tonnes were landed in foreign ports, mainly in the Netherlands. The total value of the landings was €80.8 million, €59.2 million of which was landed in Belgian ports. Landings in foreign ports had a value of €21.7 million. The number of landings and the value of landings decreased significantly, by 6.5% and 4.5% respectively, compared with 2018.

Table 2.3 Development of the number of landings and the value of landings by Belgium in 2019

Year	Landings (tonnes)	Development N-1 (%)	Value of landings (€)	Development N-1 (%)
2000	26,522		88,672,000	
2001	26,976	1.7	96,584,000	8.9
2002	25,810	-4.3	91,911,000	-4.8
2003	23,637	-8.4	90,364,000	-1.7
2004	23,607	-0.1	85,889,000	-5.0
2005	21,545	-8.7	86,280,000	0.5
2006	20,264	-5.9	90,687,000	5.1
2007	21,793	7.5	90,328,000	-0.4
2008	20,012	-8.2	76,279,000	-15.6
2009	19,175	-4.2	68,367,000	-10.4
2010	19,773	3.1	76,242,000	11.5
2011	20,138	1.8	79,437,000	4.2
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

Catches made in the various areas consist predominantly of plaice (*Pleuronectes platessa*) and sole (*Solea solea*) (see Table 2.4). They make up 28% and 12% respectively of the volume landed and, at 17% and 36% 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 number of landings and the value of landings by Belgium in 2019

Species	Landings		Value		Species	Landings		Value	
	Tonnes	%	€	%		Tonnes	%	€	%
PLAICE	5,418	28.1	13,362,000	16.5	MEGRIM	459	2.4	883,000	1.1
SOLE	2,347	12.2	29,317,000	36.3	SCALLOPS	448	2.3	893,000	1.1
CUTTLEFISH	1,480	7.7	6,322,000	7.8	ANGLERFISH	441	2.3	4,263,000	5.3
SKATES AND RAYS	1,419	7.3	2,629,000	3.3	DAB	372	1.9	303,000	0.4
GURNARDS	866	4.5	988,000	1.2	TURBOT	365	1.9	4,063,000	5.0
SHRIMP	796	4.1	2,695,000	3.3	WHITING	321	1.7	338,000	0.4
LEMON SOLE	676	3.5	2,646,000	3.3	WHELK	270	1.4	509,000	0.6
COD	670	3.5	2,191,000	2.7	POUTING	265	1.4	122,000	0.2
NORWAY LOBSTER	660	3.4	4,311,000	5.3	RED MULLET	261	1.4	653,000	0.8
DOGFISH AND GREATER SPOTTED DOGFISH	611	3.2	285,000	0.4	BRILL	256	1.3	1,974,000	2.4
					Other	910	4.7	2,071,000	2.6
					Total	19,309	100	80,819,000	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 to 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.	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
DTS	VL1012	1	1	1		1					
DTS	VL1218			2	1	2	1	1	1	1	1
DTS	VL1824	2	4	6	7	8	7	6	6	8	8
DTS	VL2440	5	5	5	5	5	5	5	6	6	9
DFN	VL1012							1	1	1	1
DFN	VL1218	4	4	1	1	1					
DFN	VL1824	1	1	1	1	1	2	1	1	1	1
DRB	VL1824	1	1		1	1		1		1	1
DRB	VL2440	1	1	1		1	1	1	1	1	
TM	VL2440										
TBB	VL1012				1						
TBB	VL1218	4	4	3	3	3	3	2	2	2	2
TBB	VL1824	36	34	30	25	24	25	22	21	18	18
TBB	VL2440	33	31	31	31	29	29	28	28	27	24
Inactive	VL1012						1				
Inactive	VL1218	1	1	2	1		2	3	1	1	1
Inactive	VL1824			2	4	2	1	4	4	2	1
Inactive	VL2440	1	2	2	1	1	1	1	1	1	1
Total		**90**	**89**	**87**	**82**	**79**	**78**	**76**	**73**	**70**	**68**

It is clear from the above that TBB18-24 and TBB24-40 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 will 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 fishermen/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 2019 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 2019

Tonnage:	**12,914 GT**
Engine power:	**42,808 kW**

Fleet catch capacity as at 31 December 2019 (**12,914 GT** and **42,808 kW**) was below the reference levels (**18,962 GT** and **51,586 kW**).

The capacity of the licence linked to the scrapped fishing vessels B.462 (from 2018) and Z.99 (from 2019) still remains available for use in the future.

Table 4.1: Changes in fleet capacity during 2019	Name	Number	Date	GT	kW	Comments
Fleet capacity on 1 January 2019 according to the fleet register				**12,898**	**42,670**	
Withdrawals without State aid in 2019						
Z.99	ARAVIS	FRA000686897	6.5.2019	**-252**	**-1,062**	Not final
GT safety added in 2019				**3**	**0**	
Z.115	ANTJE DE VRIES	BEL035961988	13.2.2019	3	0	
Capacity added without State aid in 2019						
Z.300	SOLA GRATIA	DNK000040851	25.3.2019	**265**	**1,200**	On licence B.518 from 2018
Renumbering in 2019: no impact on capacity						
Z.281	JOCHEM	BEL037382002	16.5.2019			Formerly Z.181
O.187	GRIETJE	BEL011871989	11.7.2019			Formerly Z.187
Capacity of the fleet on 31 December 2019				**12,914**	**42,808**	

5 SECTION

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 applied once (+3) in 2019. 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 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, or 2019 at the latest, the Member States have entered the minefield of choke species, the impact of which is far more difficult to estimate and record. Choke species can result in all fishing operations in an area having to be discontinued when one 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 in 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 is clear, pragmatic, global solutions which will be reliable, effective and practicable in both the short and the long term.
The overall situation will also be strongly influenced by Brexit in 2019-2020 and the prospects it presents for the future. Belgium is participating fully in this unclear, ongoing process and is preparing for the various possible scenarios.

5.3 INFORMATION ON THE GENERAL LEVEL OF COMPATIBILITY OF FLEET MANAGEMENT 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: INFORMATION ON CHANGES IN 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 (for the year 2019), 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 2019 discard plans 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: 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.	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
DTS	VL1012	1	1	1		1					
DTS	VL1218			2	1	2	1	1	1	1	1
DTS	VL1824	2	4	6	7	8	7	6	6	8	8
DTS	VL2440	5	5	5	5	5	5	5	6	6	9
DFN	VL1012							1	1	1	1
DFN	VL1218	4	4	1	1	1					
DFN	VL1824	1	1	1	1	1	2	1	1	1	1
DRB	VL1824	1	1		1	1		1		1	1
DRB	VL2440	1	1	1		1	1	1	1	1	
TM	VL2440										
TBB	VL1012				1						
TBB	VL1218	4	4	3	3	3	3	2	2	2	2
TBB	VL1824	36	34	30	25	24	25	22	21	18	18
TBB	VL2440	33	31	31	31	29	29	28	28	27	24
Inactive	VL1012						1				
Inactive	VL1218	1	1	2	1		2	3	1	1	1
Inactive	VL1824			2	4	2	1	4	4	2	1
Inactive	VL2440	1	2	2	1	1	1	1	1	1	1
Total		**90**	**89**	**87**	**82**	**79**	**78**	**76**	**73**	**70**	**68**

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.	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
VL1012	0	0	0	0	0	0	1.00	0	0	0
VL1218	0.17	0.13	0.13	0.33	0.20	0.00	0.50	1.00	0.33	0.33
VL1824	0.05	0.00	0.00	0.05	0.12	0.06	0.03	0.13	0.14	0.07
VL2440	0.08	0.03	0.05	0.05	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. As there are now only three fishing vessels in length category 12-18, 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.	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
DTS	VL2440	0.91	0.88	0.72	0.85	0.73	0.79	0.92	0.86	0.83	0.84
PMP	VL1824	0.64	0.51	0.58	0.59	0.73	0.44	0.67	0.83	0.59	0.69
TBB	VL1824	0.76	0.70	0.76	0.72	0.74	0.69	0.78	0.75	0.81	0.77
TBB	VL2440	1.05	1.09	1.07	1.11	1.18	1.14	1.17	1.12	1.13	1.19

Table 7.4: Vessel use / maximum observed		VUR									
Clustered gear	Clustered length cat.	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
DTS	VL2440	0.76	0.78	0.69	0.82	0.69	0.76	0.88	0.81	0.66	0.68
PMP	VL1824	0.55	0.58	0.76	0.67	0.62	0.70	0.82	0.93	0.84	0.74
TBB	VL1824	0.64	0.72	0.74	0.70	0.70	0.70	0.74	0.77	0.76	0.72
TBB	VL2440	0.83	0.81	0.87	0.89	0.94	0.89	0.88	0.88	0.84	0.90

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.**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
DTS	VL2440	62%	65%		51%	54%	52%	48%	47%	61%	54%
PMP	VL1824	50%	63%		70%	37%	53%	41%	54%	54%	47%
TBB	VL1824	60%	70%		50%	60%	64%	42%	40%	38%	49%
TBB	VL2440	71%	72%		70%	75%	73%	73%	68%	71%	72%

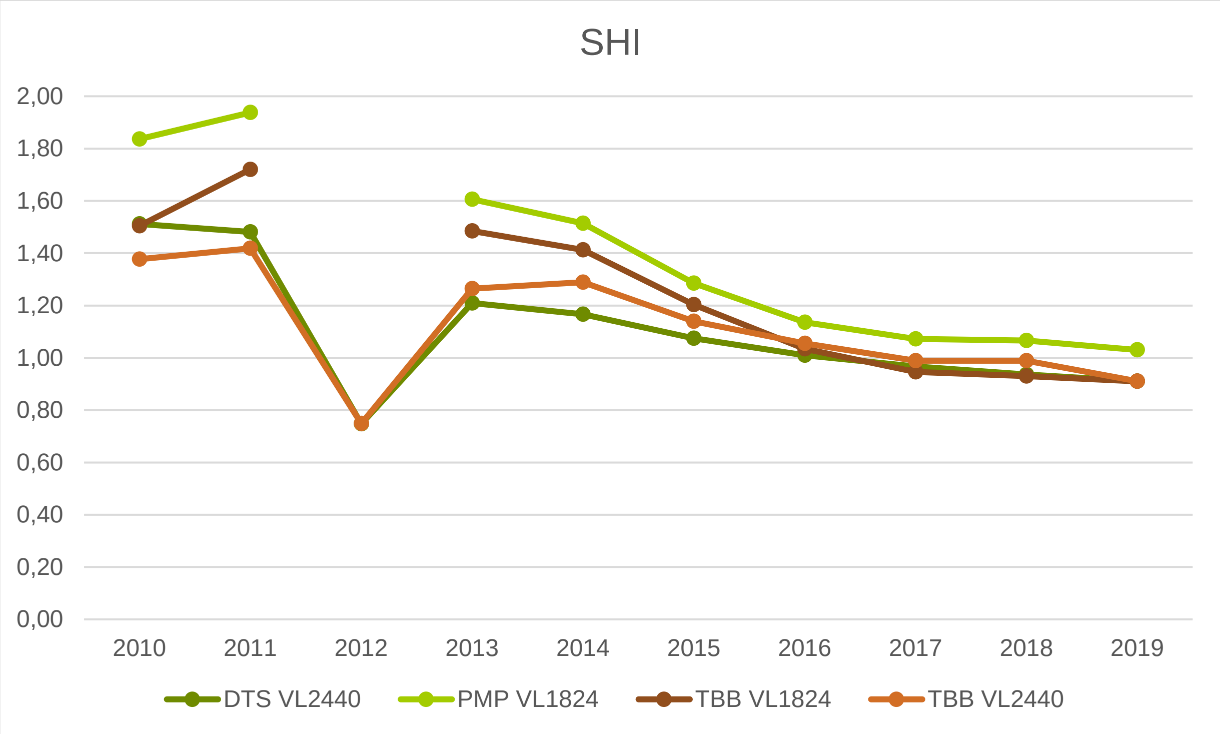
The table shows that the SHI complies with the minimum 50% criterion only in respect of TBB24-40.

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										
Fishing tech.	**Length cat.**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
DTS	VL2440	1.51	1.48	0.75	1.21	1.17	1.07	1.01	0.97	0.94	0.91
PMP	VL1824	1.84	1.94		1.61	1.51	1.29	1.14	1.07	1.07	1.03
TBB	VL1824	1.50	1.72		1.49	1.41	1.20	1.03	0.95	0.93	0.91
TBB	VL2440	1.38	1.42	0.75	1.26	1.29	1.14	1.06	0.99	0.99	0.91

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 trend followed by the indicator is, however, representative and shows the result of the efforts made to apply MSY as part of the CFP.



There is a marked decline in all fleet segments. PMP 18-24 is the only segment with values of just above 1. This needs to be qualified in view of the low Fmsy rate and the fact that the group of remaining vessels is small and diverse.

The Belgian fleet segments are accordingly **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.**	**2010**	**2011**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
DTS	VL2440	0	0	0	1	0	0	0	0	0
PMP	VL1824	0	0	0	0	0	0	0	0	0
TBB	VL1824	1	1	0	0	0	0	0	0	0
TBB	VL2440	4	4	1	1	3	3	3	1	2

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

Table 7.10: SAR stocks detail										
Fishing tech.	**Length cat.**	**2010**	**2011**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
DTS	VL2440				*Raja radiata* 4b-c-2					
PMP	VL1824									
TBB	VL1824	Plaice 7d-a-2	Sole 7d-a-2							
TBB	VL2440	Whiting 7a-a-2 Plaice 7d-a-2 Sole 7a-a-2 Sole 7h-a-2	Whiting 7a-a-2 Sole 7a-a-2 Sole 7h-a-2 Sole 7d-a-2	Sole 7a-a-2	Sole 7a-a-2	Plaice 7h-a-2 Sole 7a-a-2 Sole 7d-a-2	Plaice 7h-a-2 Sole 7a-a-2 Sole 7d-a-2	Plaice 7h-a-2 Sole 7a-a-2 Sole 7d-a-2	Plaice 7h-a-2	Plaice 7h-a-2 Sole 7h-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:

- Only 74 tonnes of sole were caught in VIIh, which is absolutely marginal (0.45%) in relation to the quantity (16,428 tonnes) landed by this fleet segment. Moreover, the fish caught came from the stock of sole in VIIhjk, Belgium being active only – and to a very limited extent – in Subarea VIIh.
- Only 6 tonnes of plaice were caught in VIIh, which is absolutely marginal (0.03%) in relation to the quantity (16,428 tonnes) landed by this fleet segment. Moreover, the fish caught came from the stock of plaice in VIIhjk, Belgium being active only – and to a very limited extent – in Subarea VIIh.

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.**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**
DTS	VL2440	-5.00	-11.69	-26.49	-17.17	-26.42	3.34	50.75	31.02	8.78
PMP	VL1824	-6.20	-132.76	75.19	8.28	2.14	-21.12	-0.14	-11.69	-6.84
TBB	VL1824	-15.55	-20.96	-17.93	-20.68	-14.95	-12.37	52.63	10.58	22.41
TBB	VL2440	-4.96	7.47	-13.94	-13.79	2.08	21.70	66.10	40.34	19.00

Except for segment PMP-VL1824 (see Table 7.11), there are no fleet segments in imbalance in accordance with the < 0 criterion, and this has been the case for the past 3 years. As stated above, segment PMP-VL1824 is in fact not really a 'segment', but rather a heterogeneous group of four remaining fishing vessels.

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.	**Length cat.**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**
DTS	VL2440	0.84	0.70	0.37	0.50	0.04	1.17	2.48	2.33	1.39
PMP	VL1824	0.76	-0.18	1.82	1.53	1.18	0.21	1.04	0.51	0.77
TBB	VL1824	0.39	0.11	0.12	0.04	0.51	0.62	2.29	1.67	1.81
TBB	VL2440	0.87	1.25	0.63	0.66	1.07	1.66	2.41	2.13	1.52

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.