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Fisheries

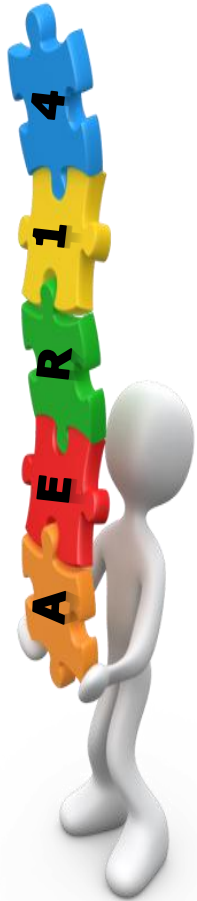
The AER on the EU Fishing Fleet 2014

Support to policy analysis (EMFF OP)

Angel Calvo Santos, MARE A3
1 December 2014

DG MARE
Directorate-General for Maritime
Affairs and Fisheries

1. Content of the 2014 report



1 - Economic and structural overview of the EU fishing fleet.

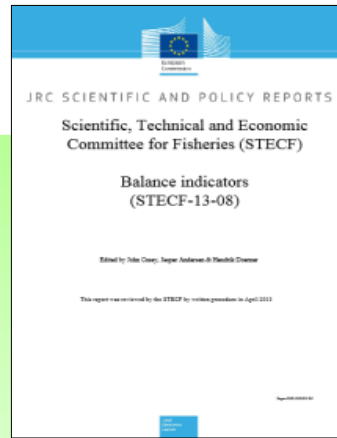
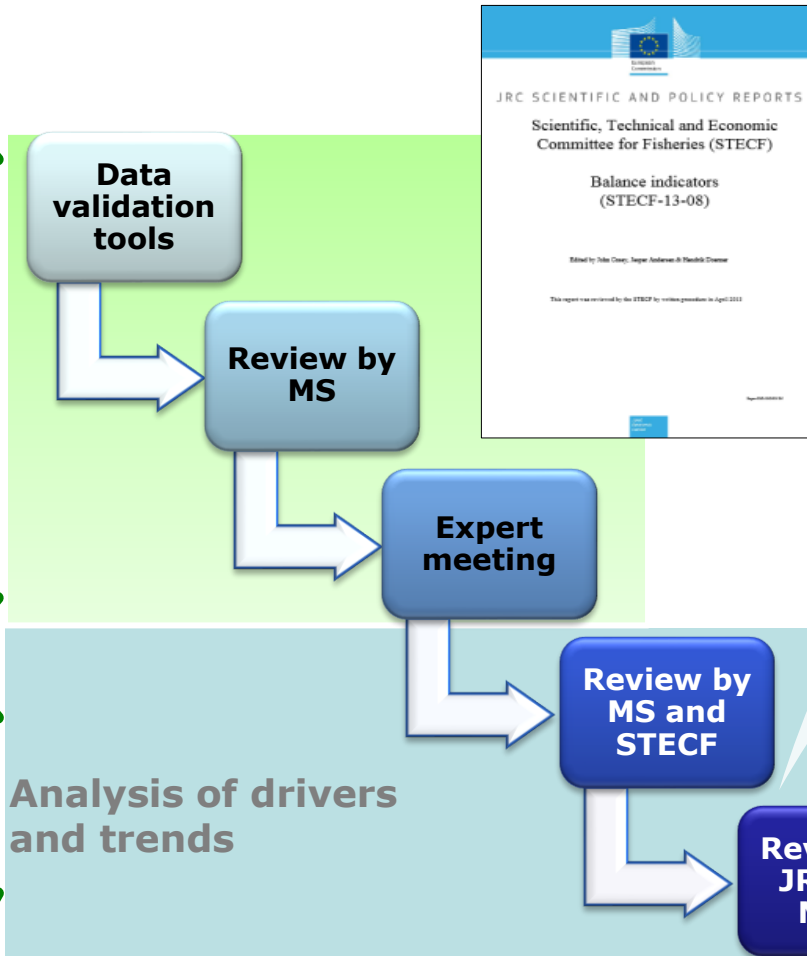
2 -Regional analyses of the EU fishing fleet.

3 - Economic performance assessments for each EU Member State.

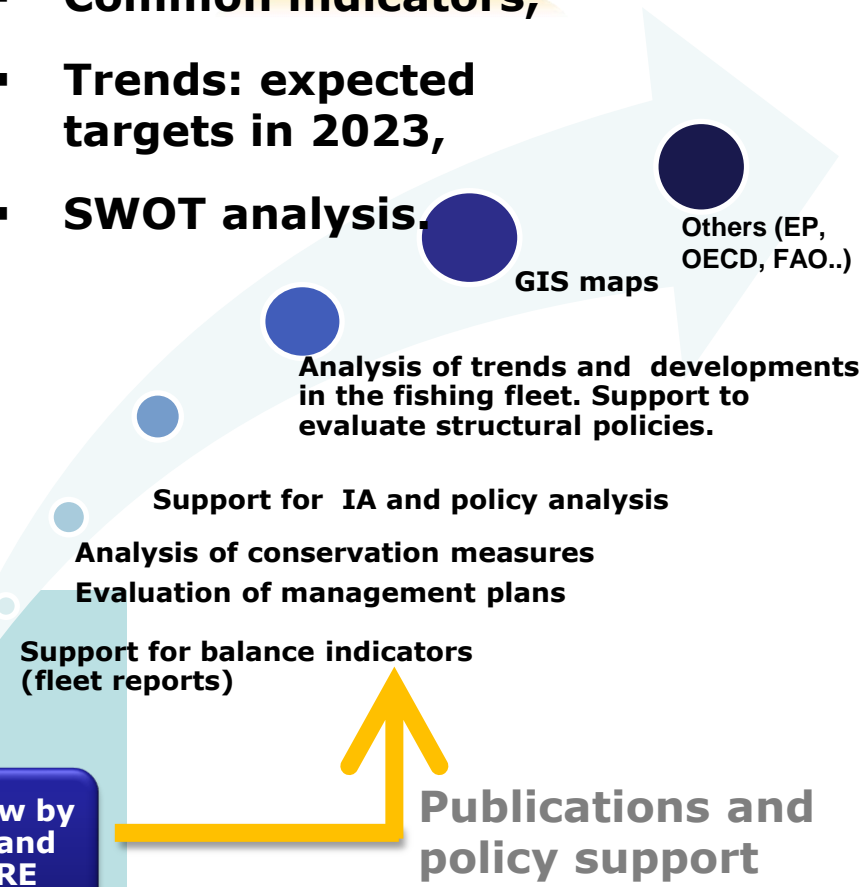
4 – Balance indicators

1. AER policy uses

Data quality checks



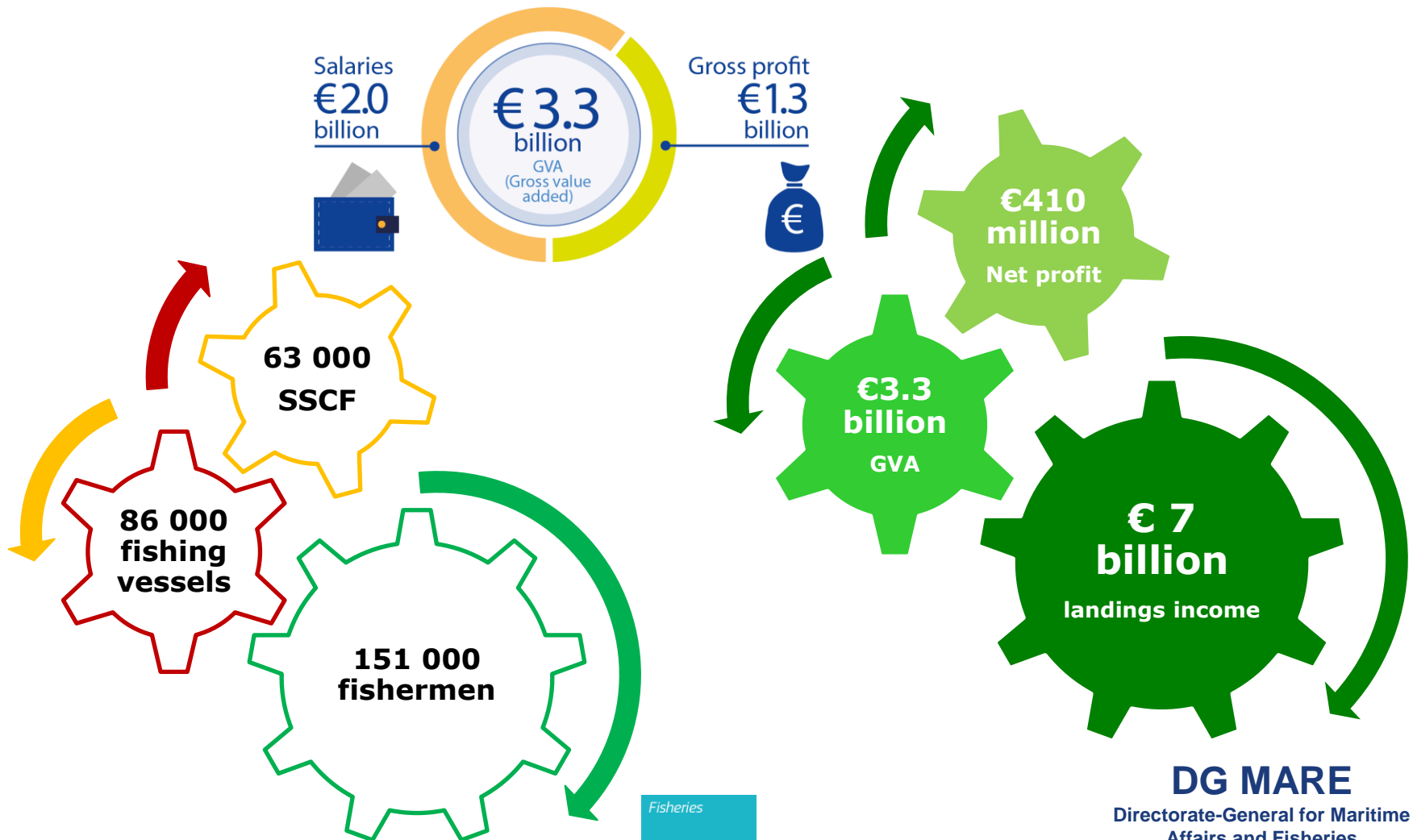
- **Common indicators,**
- **Trends: expected targets in 2023,**
- **SWOT analysis.**





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2. The big numbers of the EU fleet





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2. EU overview: a quick snapshot by MS

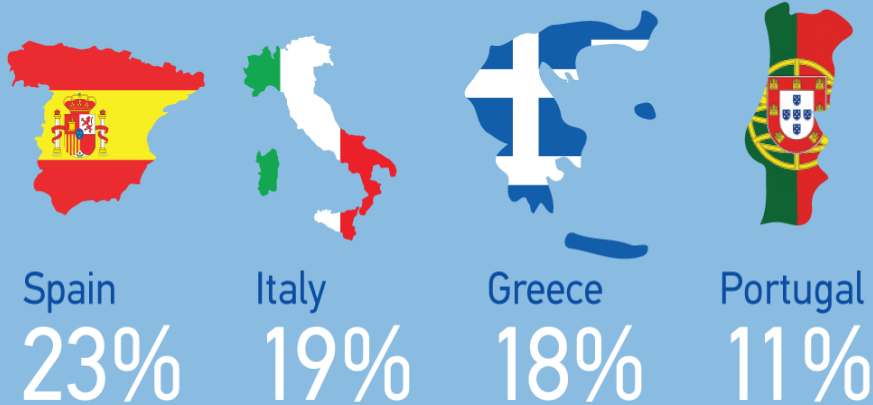


GT

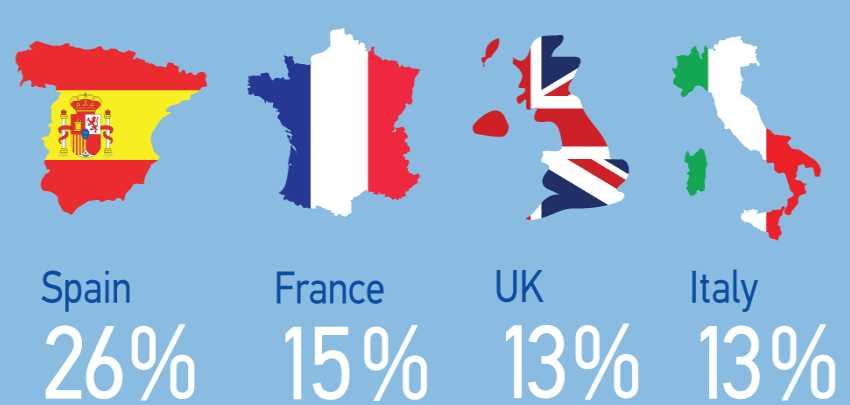
kW



Top countries for fisheries jobs



Top countries for value of landings



2. EU overview: fleet category

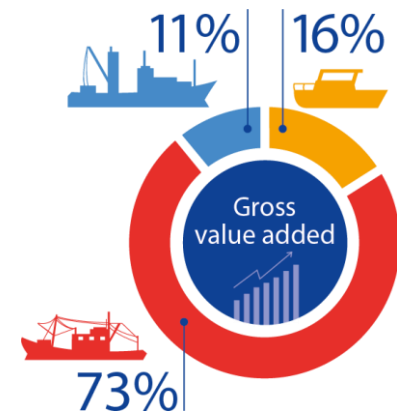
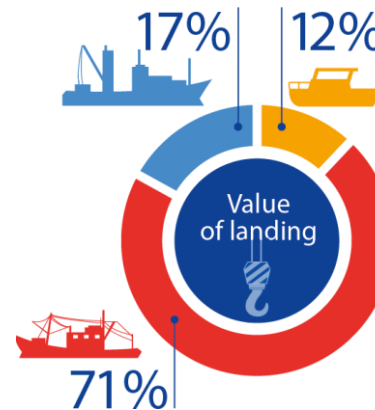
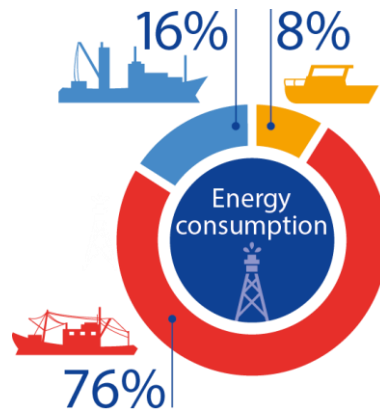
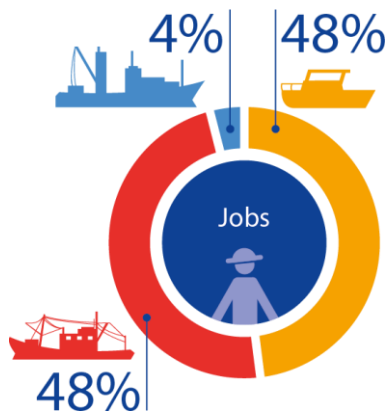
3 different types of fleets

86,283
vessels

74%
EU small-scale
coastal fleet

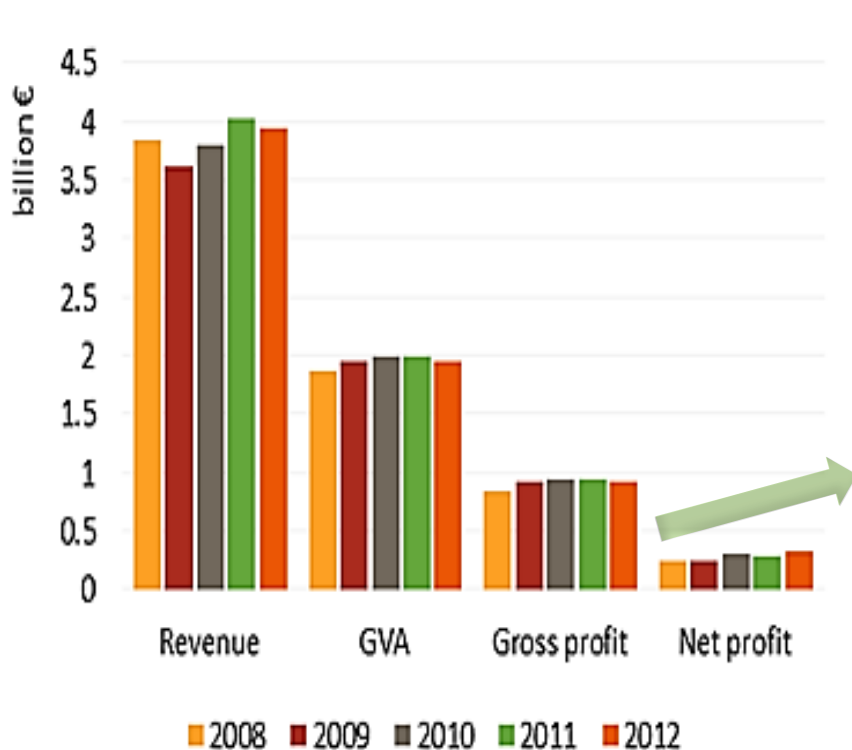
25%
EU large-scale fleet

1%
Distant-water fleet



2. EU overview: trends in the economic performance

Good news...



and bad news...

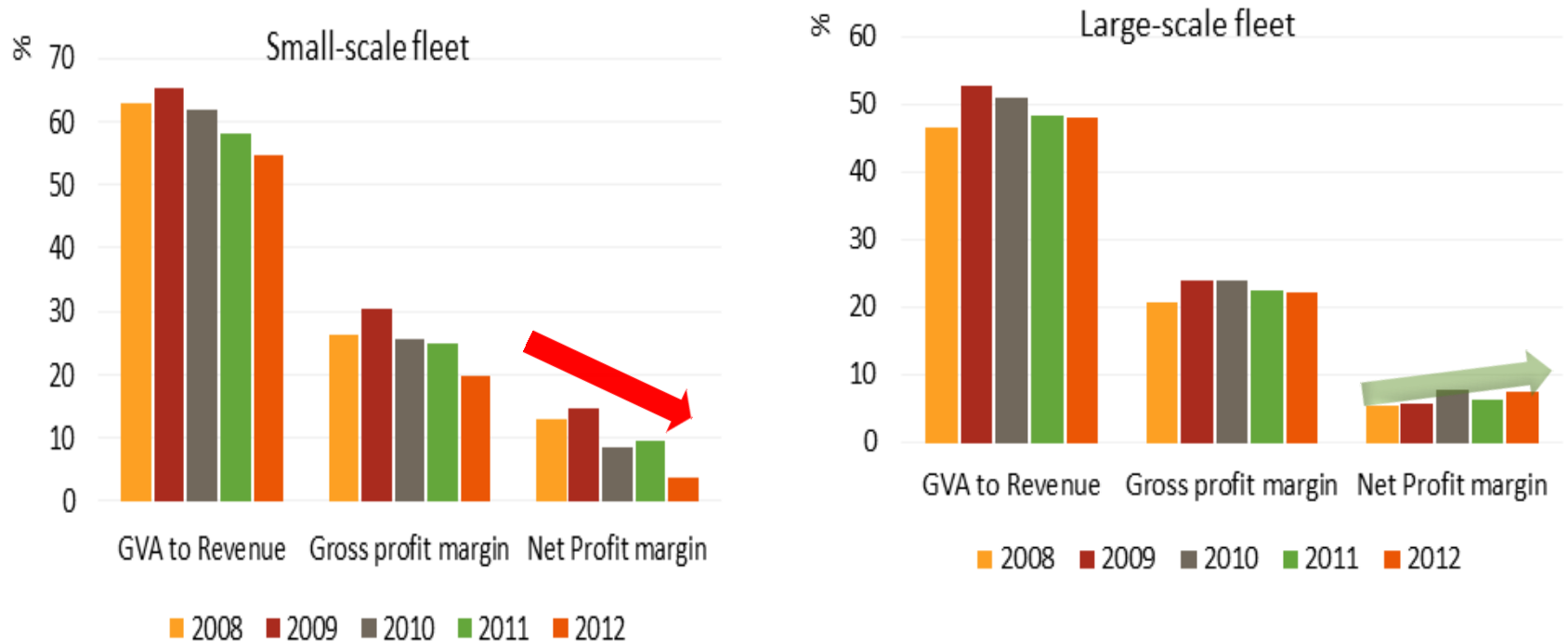
Overcapacity in several fleet segments (e.g. beam trawlers)

Several fleet segments in a loss making position

4 national fleets incurring in losses



2. EU overview: trends in the economic performance by fleet category



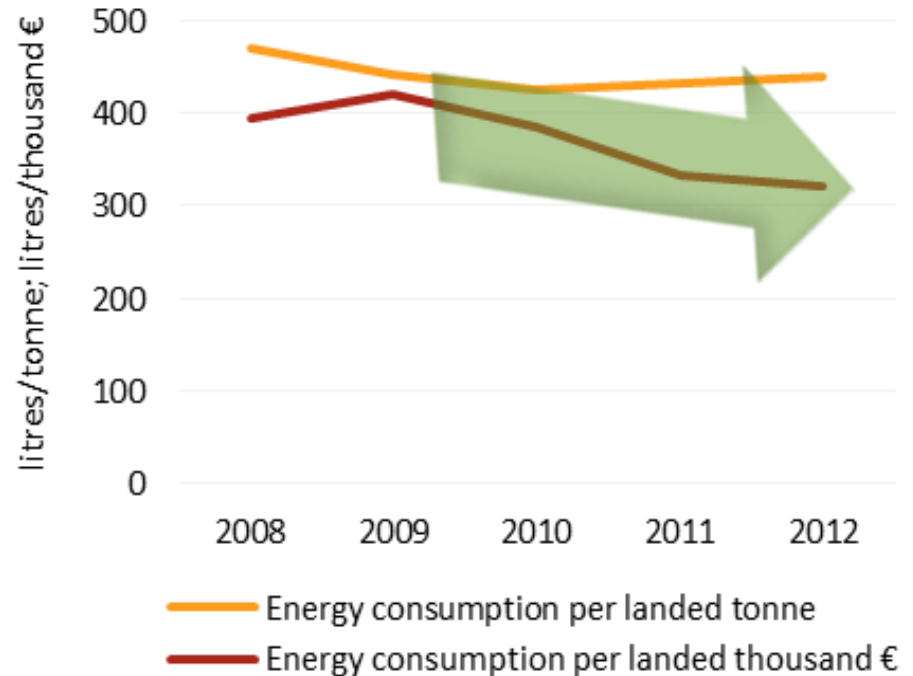
2. EU overview: fuel efficiency

Fuel efficiency "energy consumption/fish landed"

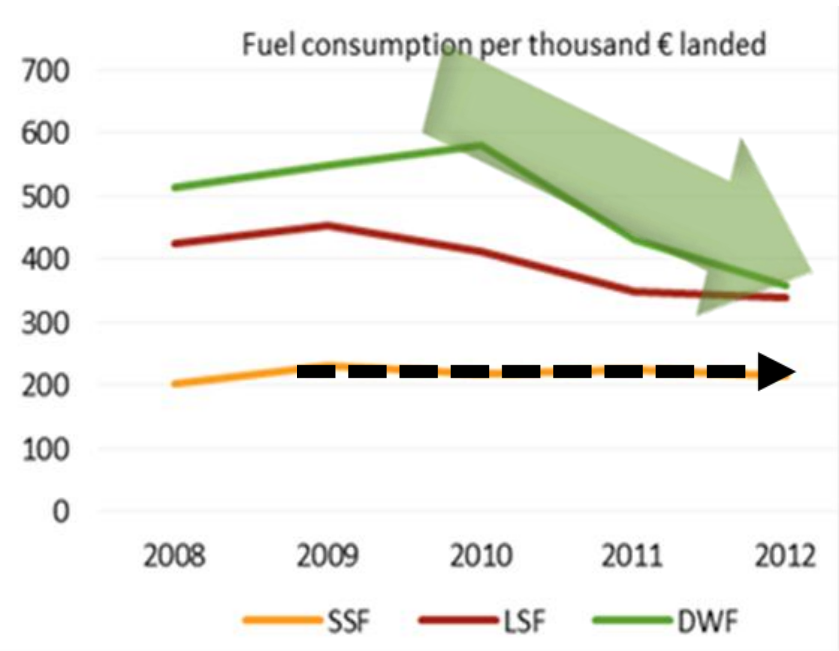
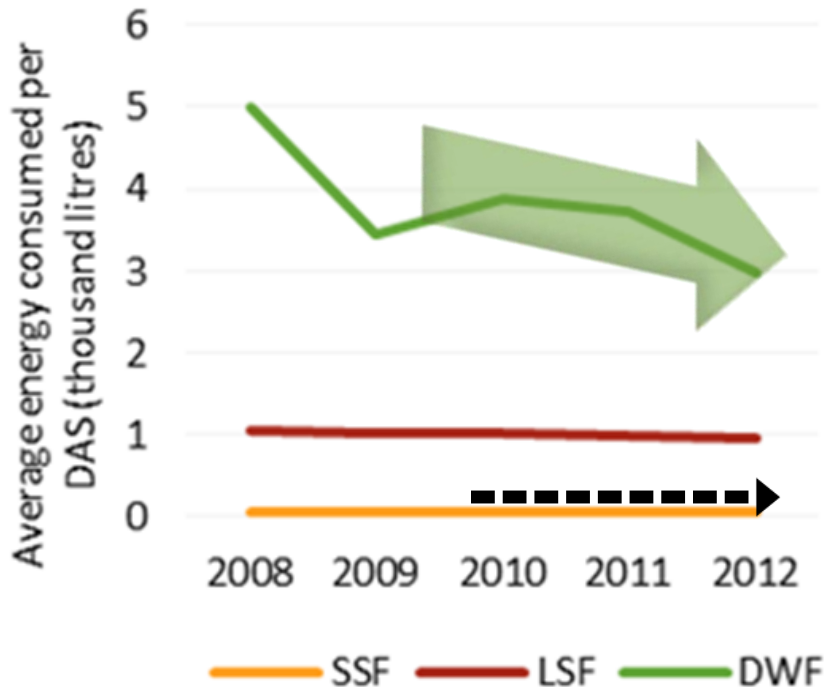
The EU fleet's fuel consumption has decreased. This is mainly due to changes in fishing practices and the introduction of energy-saving technologies (more environmentally friendly fishing gear etc.).



Energy consumption in millions of litres of fuel (based on a sample of national fleets)

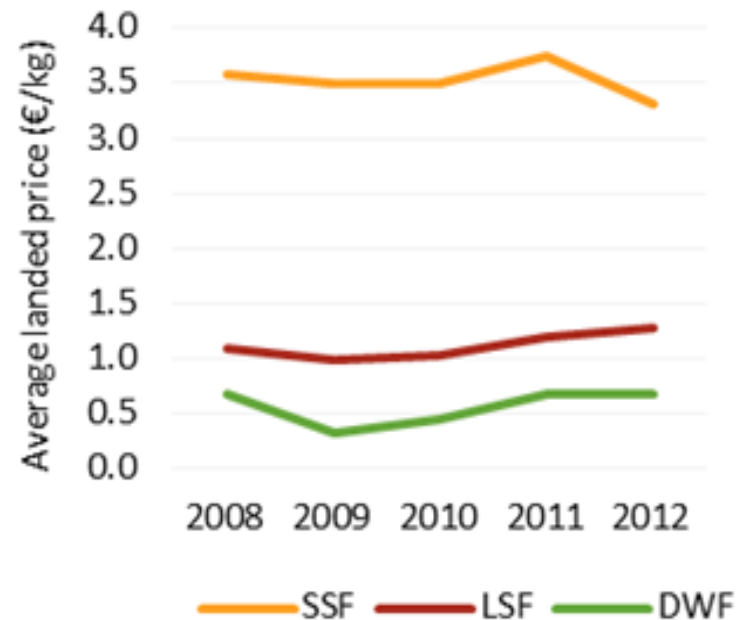


2. EU overview: fuel efficiency by fleet category

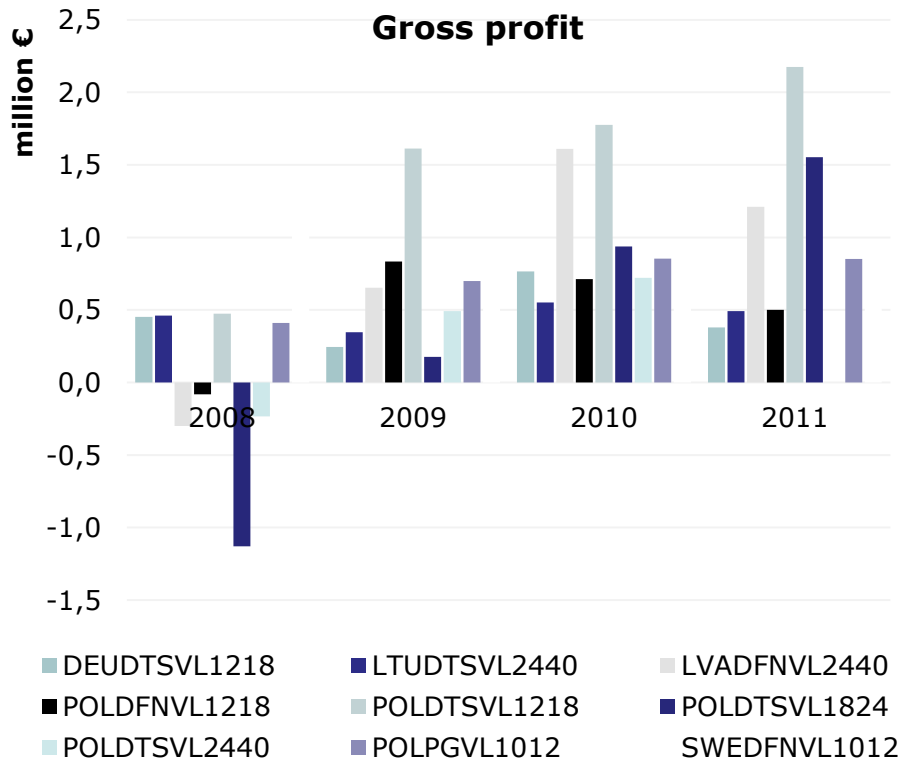


2. EU overview: trends in first sale prices

Top species at EU level in terms of weight	Variation in average price				
	Δ2008-09	Δ2009-10	Δ2010-11	Δ2011-12	Δ2012-average (2008-2011)
Atlantic herring	-15,2%	26,7%	8,5%	11,9%	27,7%
European sprat	-28,3%	26,2%	20,0%	20,3%	40,9%
European pilchard(=Sardine)	-0,3%	-11,4%	-7,9%	67,9%	47,9%
Skipjack tuna	-36,7%	8,5%	26,2%	2,4%	11,4%
Jack and horse mackerels nei	-18,5%	5,9%	16,9%	14,8%	25,6%
European anchovy	18,9%	-12,5%	-7,5%	33,9%	22,9%
Sandeels(=Sandlances) nei	-3,6%	60,8%	-4,3%	41,7%	68,3%
Norway lobster	-18,3%	11,9%	15,5%	-0,4%	11,0%
Saithe	-2,8%	17,9%	18,1%	-3,1%	17,3%
Atlantic cod	-27,4%	4,1%	7,5%	1,4%	0,0%
Atlantic mackerel	-9,6%	0,8%	24,9%	-16,8%	-4,2%
European plaice	-26,6%	-4,1%	6,4%	-1,7%	-7,6%
European hake		0,3%	-6,0%	-7,2%	-10,9%
Great Atlantic scallop	-15,1%	-1,5%	13,2%	-14,4%	-10,7%
Haddock		13,2%	1,3%	-10,2%	-5,7%



3. Analysis of key fleet segments (Long Term Management plans)



✓ GVA 40% between 2008-2011

3. Drivers & Trends that influence the economic performance (SWOT analysis?)

Higher average first sale prices for commercially important species;

Recovery of some stocks;

Research and innovation projects funded by the EFF and national support;

Capacity reduction (with or without public support);

Implementation of certification schemes and the growing demand for certified products;

More fuel efficient fishing techniques and changes of fishing behaviour;

Increasing fuel prices;

Economic crisis and limit access to credit;

Shortage of local crews ;

Poor marketing ;

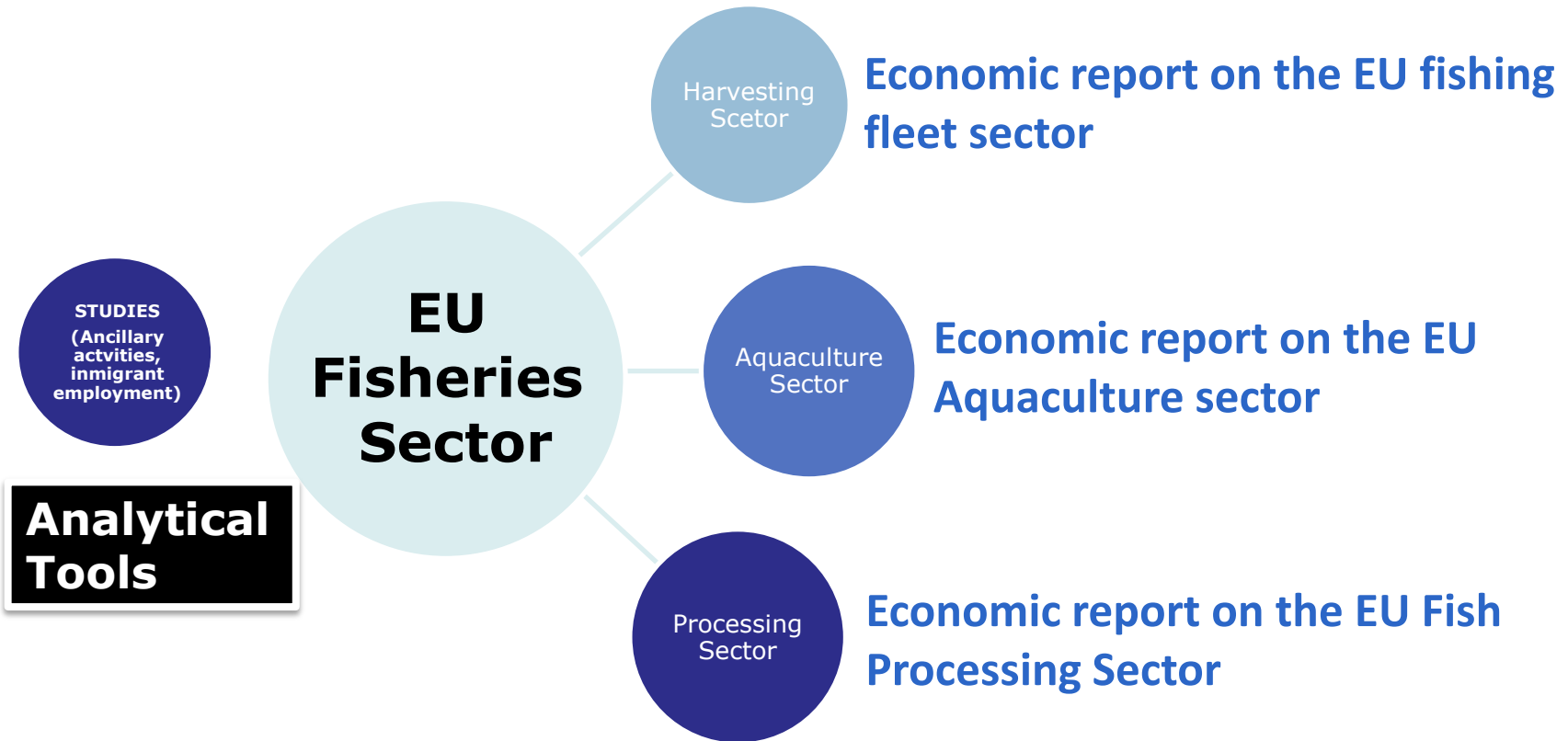
Reduced TACs and quotas;

Severe weather conditions damage caused by marine mammals;

Increase in the number of areas that prohibit or limit specific fishing;

3. Other applications and developments

CLOSE THE ANALYSIS OF THE EU FISH VALUE CHAIN



Thank you!



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