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ANNUAL FLEET REPORT FOR 2016 – Belgium

'Sustainable balance between fishing capacity and fishing opportunities'

31.5.2017

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DEPARTEMENT
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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 2016 the capacity of the Belgian fleet fell by a further 276 kW and 217 GT. The total decrease was 34 % in kW and 43 % in GT terms compared with the 2003 reference level. Fishing capacity is, in other words, well below the reference levels (Table 4.2).

In 2017, the current reporting year, a full review of the way in which indicators are calculated was carried out in accordance with the guidelines provided, as recommended by the Commission.

The 2008-2016 summary contained 14 fleet segments (Table 7.1). On the basis of the number of segments in 2016, together with the minimum time series of three 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 technology:

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 carefully assessed 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 fact, 'in balance'. On the basis of the full range of indicators, it may therefore be concluded that TBB18-24 and TBB24-40, the significant fleet segments, are **in balance** with the fishing opportunities.

B) Overview:

1. Is there a balance between fleet capacity and fishing opportunities?
   Yes, in balance. Stable in 2016.
2. Size of the fleet:
   72 fishing vessels: 13 855 GT and 45 051 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 (2 481 tonnes)
     - plaice (8 946 tonnes)

   See Section 2.1 for details.
4. Number of changes in fleet capacity:
   Nine. 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?
   As well as providing extensive information on previous years, in the 2017 reporting year Belgium will focus on implementing the sole improvement action plan in VIId (sole, English Channel East, sol-eche). The action plan was submitted in December 2016 in response to the Commission's finding in the previous year that the two largest fleet segments, TBB 24-40 and TBB18-24, were not 'in balance' and that a specific action plan therefore had to be drawn up and implemented. The points for action under the plan are discussed in Section 6.E. The *ex ante* conditions under the EMFF are another related factor. Belgium would point out that all the relevant information has been uploaded in SFC 214.
9. Balance indicators applied?
   Yes.
   Key indicators:
   Technical (three, out of operation, VUW 220 and 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 2016 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 2016 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. In comparison with 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 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 the Belgian fisheries sector is, as has repeatedly been stated, below subsistence level, there are nevertheless developments which indicate that the situation might stabilise if solutions can be found to the problems of fleet renewal, investment in family businesses and, above all, a vision for the future of the sector as a whole in a new CFP environment. Every effort is being made to find viable solutions for mixed fisheries in order to meet both the economic and the environmental targets.
- 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. Given that the fishing grounds are widely dispersed and the fleet size has been greatly reduced, a smaller fleet is not an option.
- 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.
  The shift of biological reference points from Fpa to Fmsy is an important factor that has had a major impact on the Belgian sector, which is highly specialised in sole fishing, particularly as a result of decreasing quotas in major fishing grounds, resulting in a shift in fishing activity. The distribution of fishing grounds accordingly makes a positive contribution to

solving the problems in part, while the sector will continue its efforts to help achieve the MSY.

- Dependency on government support?
  Yes.
  Over the past year Belgian vessel owners have submitted few applications for aid under the EMFF, partly because of the restrictions imposed by the fund and partly because of the uncertainties resulting from increasing implementation of the landing obligation. There has accordingly been a shift from individual projects to collective projects in order to future-proof the sector. It is regrettable that no funding is provided to replace the outdated fleet with new fishing vessels which are even more environmentally friendly and economical.

- 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. In any case, rising gas oil prices have a direct and very negative impact on the sector's profitability. The major efforts made in recent years to improve the situation, which were driven by the EFF, have indeed made the beam trawl fleet less dependent on gas oil prices and brought it into line with the beam trawl fleets of other Member States. Those efforts must be sustained if the dependency of the fleet is to be further reduced.

- Can fleets withstand short-term catch limits?
  To some extent.
  The administrative transition from the CFP to the Fmsy principle has for the most part now been made. The next challenge is to implement the landing obligation. 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 and 2019. 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 or even absurd situations.

D) Amendments to the fleet report compared with previous years

This year the report was drawn up in consultation and cooperation with the scientific research institute ILVO on the basis of the most recent data available and the most accurate calculations set out in the guidelines. If this leads to a positive assessment, the approach taken and structure used may be extended on the basis of the feedback received.

2 SECTON 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, 52 %), the English Channel (VIIde, 32 %), the Celtic Sea (VIIfg, 13 %), the Irish Sea (VIIa, 1 %) and the Bay of Biscay (VIIIab, 2 %). Landings from other areas are negligible. These percentages are very stable and do not change much from year to year. Only fishing activities in the Irish Sea decreased further and were almost halved as a percentage, from 2 % in the previous year to 1 % in 2016.

Table 2.1 Overview of Belgium's main fishing activities in 2016			
Fishing method	Days at sea (%)	Landings (%)	Value (%)
Beam trawl	63.9	76.2	73.6
Otter trawl	5.7	6.4	4.8
Dredges	2.1	1.7	1.4
Shrimp	16.4	5.0	8.1
Nephrops	8.5	6.3	8.7
Passive	1.3	0.2	0.4
Seine	2.1	4.2	3.1
Total	14 248	24 583 tonnes	EUR 93 329 000
Zone	Days at sea (%)	Landings (%)	Value (%)
IVb,c	52.0	51.7	49.7
VIId,e	27.1	31.5	27.7
VIIf,g	15.5	12.9	2.1
VIIa	1.0	0.9	0.7
VIIa,b	3.8	2.1	4.3

On 31 December 2016 the Belgian fishing fleet consisted of 72 vessels (-4). Broken down by segment, 35 vessels had engine power of more than 221 kW (large fleet segment, LFS) and 37 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 25 years for the large fleet segment and 33 years for the small fleet segment.

Table 2.2 Breakdown by fleet segment for Belgium in 2016		
Segment		Number
SFS (<=221 kW)	Coastal fishing boats	16
	Eurocutters	15
	Other	6
LFS (>221 kW)	Large sheerlegs	29
	Other	6
Total		72

24 583 tonnes of fishery products were landed in 2016 (see Table 2.3). Of those, 16 713 tonnes were landed in the Belgian ports of Zeebrugge, Ostend and Nieuwpoort. The remaining 7 870 tonnes were landed in foreign ports, with over 90 % of that tonnage landed in the Netherlands. The total value of the landings was EUR 93.3 million, EUR 65.0 million of which was landed in Belgian ports. Landings in foreign ports had a value of EUR 28.4 million. The **number of landings** and the **value of landings increased significantly**, by **9.3 % and 14.1 %** respectively, compared with 2015.

Table 2.3 Development of the number of landings and the value of landings by Belgium in 2016				
Year	Landings (tonnes)	Development N-1 (%)	Value of landings EUR	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

Catches made in the various areas consist predominantly of plaice (*Pleuronectes platessa*) and sole (*Solea solea*) (see Table 2.4). Together they make up 36 % and 10 % respectively of the total volume landed and 16 % and 30 % respectively of the value landed. Other species individually account for 5 % or less of the volume landed.

Table 2.4 Composition of the number of landings and the value of landings by Belgium in 2016									
Species	Landings		Value		Species	Landings		Value	
	Tonnes	%	EUR	%		Tonnes	%	EUR	%
PLAICE	8 946	36.4	15 311 000	16.4	BLONDE RAY	417	2.0	1 087 000	1.2
SOLE	2 481	10.1	28 317 000	30.3	DOGFISH	407	2.0	192 000	0.2
TUB GURNARD	1 252	5.1	1 400 000	1.5	DAB	399	2.0	398 000	0.4
SHRIMP	1 114	4.5	7 360 000	8.0	BRILL	356	1.0	2 446 000	2.6
COD	1 065	4.3	3 388 000	4.0	WHITING	341	1.0	366 000	0.4
CUTTLEFISH	893	4.0	2 864 000	3.1	POUTING	315	1.0	198 000	0.2
SCALLOPS	769	3.1	2 424 000	2.6	MEGRIM	287	1.0	672 000	0.7

LEMON SOLE	763	3.1	3 989 000	4.3	Other	2 519	10.2	6 537 000	6.0
NEPHROPS (WHOLE)	763	3.1	5 762 000	6.2				
TURBOT	532	2.2	5 018 000	5.4				
ANGLERFISH	516	2.1	5 091 000	5.5				
THORNBACK RAY	449	1.8	975 000	1.0				

2.2 BREAKDOWN OF FISHING ACTIVITIES

The dataset used to calculate the indicators is identical to that provided in response to the call made each year for data for the JRC's annual economic report.

The fleet is segmented as follows in accordance with the standard classification:

Table 2.5: Composition of fleet segments		Total number of vessels								
fishing_tech	vessel_length	2008	2009	2010	2011	2012	2013	2014	2015	2016
DTS	VL1012	1		1	1	1		1		
DTS	VL1218					2	1	2	1	1
DTS	VL1824	1	3	2	4	6	7	8	7	6
DTS	VL2440	4	6	5	5	5	5	5	5	5
DFN	VL1012		1							1
DFN	VL1218	2	2	4	4	1	1	1		
DFN	VL1824	1	1	1	1	1	1	1	2	1
DRB	VL1824			1	1		1	1		1
DRB	VL2440		1	1	1	1		1	1	1
TM	VL2440		1							
TBB	VL1012						1			
TBB	VL1218	5	4	4	4	3	3	3	3	2
TBB	VL1824	36	35	36	34	30	25	24	25	22
TBB	VL2440	48	40	33	31	31	31	29	29	28
INACTIVE	VL1012								1	
INACTIVE	VL1218		1	1	1	2	1		2	3
INACTIVE	VL1824	2	2			2	4	2	1	4
INACTIVE	VL2440	2	5	2	3	3	2	2	2	2
Total, Belgium		102	102	91	90	88	83	80	79	77

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 DDTS 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 to be able 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 wider economy, sends out a clear signal that this primary sector is in need of stimulation and support in order to effectively tackle its current and future challenges.

3 SECTION B

3.1 OPINION ON PLANS FOR REDUCING THE FISHING EFFORT

The same as in previous reporting years.

3.2 IMPACT OF FISHING EFFORT REDUCTION PLANS ON FISHING CAPACITY

The same as in previous reporting years.

4 SECTION C

Capacity of the Belgian fishing fleet
Capacity of the fleet on 1 January 2003: GT_{03} = 24 363 GT and kW_{03} = 68 304 kW ([1])
Reference levels on 1 January 2003: $R(GT)_{03}$ = 23 372 GT and $R(kW)_{03}$ = 67 857 kW

Capacity added with State aid in 2016: GT_{100} = 0 and kW_{100} = 0

Tonnage added for safety reasons in 2016: GT_s = 0

Table 4.1: Changes in fleet capacity during 2016	Name	Number	Date	GT	kW	Comments
Fleet capacity on 31 December 2012 according to the fleet register				**14 072**	**45 327**	
Withdrawals without State aid in 2016				**-444**	**-1 957**	
Z.402	NOOITGEDACHT	BEL034022000	8.1.2016	-102	-221	
N.95	JONAS II	BEL040951987	22.2.2016	-18	-471	
N.34	L'ETAPLOIS	BEL040731986	14.3.2016	-22	-220	
Z.468	CLEANER	BEL035681988	30.3.2016	-100	-221	
N.58	PELORUS JACK	BEL040581986	15.6.2016	-66	-221	
O.20	NYX	BEL040221963	30.6.2016	-37	-161	
Z.181	DUBBELE SENIOR	BEL037382002	1.7.2016		-221	
N.57	SPES-NOVA	BEL040571986	22.12.2016	-99	-221	
Withdrawals due to loss of fishing vessels in 2016				**-95**	**-221**	
Z.85	MORGENSTER	BEL030851987	31.7.2016	-95	-221	
Engine power added in 2016 to the licence of lost fishing vessels				**25**	**221**	
Z.85	ALEXIS II	FRA000686426	1.8.2016	25	221	

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[1] Fleet capacity as at 1 January 2003, adjusted in fleet register on 28 April 2008.

Engine power added in 2016 following consolidation				**0**	**221**	
O.554	GODELIEVE	BEL015542000	26.7.2016		221	
Capacity added without State aid in 2016				**367**	**1 736**	
Z.189	CORNELIS GERRIT	BEL034022000	8.1.2016	102	221	
Z.180	CORNELIS SENIOR	BEL035681988	30.3.2016	100	221	
O.81	JAIDY	BEL040581986	15.6.2016	66	221	
Z.181	DUBBELE SENIOR	BEL037382002	1.7.2016		852	
O.83	JOKE	BEL040571986	22.12.2016	99	221	
Withdrawals of engine power in 2016 through conversion into fishing entitlement factors				**0**	**-55**	
O.20	NYX	BEL040221963	30.6.2016		-55	Fishing entitlement factor 1.25 for Z.180
Withdrawals of engine power in 2016 for administrative reasons				**-70**	**-221**	
O.71	JACOB KIEN	BEL030701985	15.10.2016	-70	-221	
Capacity of the fleet on 31 December 2016				**13 855**	**45 051**	

Capacity of the fleet on 31 December 2016

Tonnage: **13 855 GT**
Engine power: **45 051 kW**

Reference levels and fleet ceiling

The reference levels and fleet ceilings on 31 December 2016 were as follows:

GT ref = **19 034.19 GT**
kW ref = **48 284.80 kW**

Table 4.2: Reference levels calculated on 31 December 2016				
Belgium		**GT**		**kW**
1	Reference level on 1.1.2003	**R(GT)03**	23 372	**R(kW)03**	67 857
2	Entries of vessels of more than 100 GT financed with public aid	**GT100**	0	**kW100**	0
3	Increases in tonnage GT for reasons of safety	**GTS**	117		
4	Exits before 1.1.2007 financed with public aid	**GTa1**	2 935	**kWa**	7 584
5	Exits after 1.1.2007 financed with public aid	**GTa2**	2 646		8 363
6	Power of engines replaced			**kWr**	20 361
7	**Capacity of the fleet on 31.12.2016**	**GTt**	13 855	**kWt**	45 051
8	**Reference level on 31.12.2016**	**R(GT)t**	**19 034.19**	**R(kW)t**	**48 284.80**

Line 8 : R(GT)t = 1 - 35 % 2 + 3 - 99 % 4 - 96 % 5 and R(kW)t = 1 - 35 % 2 - 4 - 5 - 20 % 6
Not to deduct 991 (GTa1) from GT Reference Level
Not to deduct 447 (kWa) from kW Reference Level
GT Ceiling is higher than GT Reference Level, the GT Ceiling is the GT Reference Level

Fleet catch capacity as at 31 December 2016 (13 855 GT and 45 051 kW) was below the reference levels (19 034.19 GT and 48 284.80 kW).

5   SECTION D

5.1   SUMMARY OF STRENGTHS AND WEAKNESSES OF THE FLEET MANAGEMENT SYSTEM

The principle that capacity can never increase except for reasons of GT safety, when the reserve between the fleet ceiling and current GT capacity can be used, is integral to all aspects of fleet management. GT safety was not applied in 2016.

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. From 2018, or 2019 at the latest, the Member States will enter 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 sufficient quotas remain for a range of target and by-catch species. Although the allocation of quotas is relatively stable, entire fleets are at risk of being made inoperative on account of the disproportionate number of choke species in the framework of sustainable exploitation to maximise the fishing opportunities of the fleet segments.
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 give rise to 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.

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

Belgium's VIId sole action plan (AP7d-sol) following the Commission's decision to classify the Belgian fisheries segments as 'in imbalance' on the basis of the fleet report submitted in 2016.

The action plan, which was submitted at the end of 2016, contains 10 targeted actions to be taken by Belgium in response to the high F/Fmsy indicator for sole in VIId. Belgium's fishing activities are

the cause of only a small part of total fishing mortality in that fishing zone. That is why the impact of the sub-actions must be monitored and evaluated over time and in relation to the zone or to the wide range of fishing activities targeting the species.

The following list indicates the current status of the various sub-actions:
- Minimum length of fish landed: 25 cm: implemented (Ministerial Decree of 3 March 2017, in force since 11 March 2017).
- Improved selectivity of juvenile fish: Flemish panel in use since 1 January 2016.
- Action plan tabled and proposed at the meeting of the regional working group (North-Western Waters High-Level Group, set up in April 2017).
- Monitoring of capacity and fishing effort: the relevant values and indicators can be requested for this zone and are used where necessary.
- Sol-eche benchmark: currently at ICES level in 2017.
- Inspection programme: VIId percentage to be calculated for 2017 and subsequent years.
- Investments to reduce unwanted catches: open measure under the EMFF.
- Investments to increase survival: open measure under the EMFF.
- Investments to improve selectivity: open measure under the EMFF.
- Improving quota management: sole in VIId is a standing agenda item and is discussed at each meeting of the Quota Committee (set up in January 2017).
- Implementing Valduvis: Valduvis implementation project submitted under the EMFF.
- Valduvis indicator for VIId: it will be possible to draw up specific aggregations using the Valduvis tool as soon as the system is operational.

7 SECTION F: BALANCE INDICATORS

7.1 TECHNICAL INDICATORS

7.1.1 Percentage of inactive fishing vessels

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

Table 7.1: Number inactive		Total number of vessels								
fishing_tech	vessel_length	2008	2009	2010	2011	2012	2013	2014	2015	2016
DTS	VL1012	1		1	1	1		1		
DTS	VL1218					2	1	2	1	1
DTS	VL1824	1	3	2	4	6	7	8	7	6
DTS	VL2440	4	6	5	5	5	5	5	5	5
DFN	VL1012		1							1
DFN	VL1218	2	2	4	4	1	1	1		
DFN	VL1824	1	1	1	1	1	1	1	2	1
DRB	VL1824			1	1		1	1		1
DRB	VL2440		1	1	1	1		1	1	1
TM	VL2440		1							
TBB	VL1012						1			
TBB	VL1218	5	4	4	4	3	3	3	3	2
TBB	VL1824	36	35	36	34	30	25	24	25	22
TBB	VL2440	48	40	33	31	31	31	29	29	28
INACTIVE	VL1012								1	
INACTIVE	VL1218		1	1	1	2	1		2	3
INACTIVE	VL1824	2	2			2	4	2	1	4
INACTIVE	VL2440	2	5	2	3	3	2	2	2	2
Total, Belgium		**102**	**102**	**91**	**90**	**88**	**83**	**80**	**79**	**77**

The percentage of inactive fishing vessels in each relevant fleet segment has not exceeded the 20 % limit for the past three years (see Table 7.2). The Belgian fleet segments are accordingly **in balance** as far as the 'inactive fishing vessels' indicator is concerned.

Table 7.2: Percentage inactive	Percentage of inactive vessels								
Length cat.	2008	2009	2010	2011	2012	2013	2014	2015	2016
VL1012	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	100.0 %	0.0 %
VL1218	0.0 %	14.3 %	11.1 %	11.1 %	25.0 %	16.7 %	0.0 %	33.3 %	50.0 %
VL1824	5.0 %	4.9 %	0.0 %	0.0 %	5.1 %	10.5 %	5.6 %	2.9 %	11.8 %
VL2440	3.7 %	9.4 %	4.9 %	7.5 %	7.5 %	5.3 %	5.4 %	5.4 %	5.6 %
All	3.9 %	7.8 %	3.3 %	4.4 %	8.0 %	8.4 %	5.0 %	7.6 %	11.7 %

Table 7.3: Vessel use/average 220		VUR 220								
Fishing tech.	**Length cat.**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
DTS	VL2440	1.00	1.04	0.97	0.93	0.78	0.91	0.76	0.82	0.96
PMP	VL1824	0.55	0.54	0.62	0.53	0.62	0.60	0.76	0.46	0.63
TBB	VL1824	0.75	0.77	0.80	0.75	0.80	0.75	0.77	0.74	0.82
TBB	VL2440	1.04	1.13	1.17	1.22	1.20	1.25	1.31	1.26	1.32

Table 7.4: Vessel use/maximum observed		VUR								
Fishing tech.	**Length cat.**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
DTS	VL2440	0.78	0.79	0.72	0.77	0.68	0.81	0.64	0.76	0.84
PMP	VL1824	0.8	0.44	0.49	0.58	0.74	0.68	0.62	0.68	0.76
TBB	VL1824	0.68	0.71	0.63	0.68	0.74	0.69	0.72	0.64	0.74
TBB	VL2440	0.76	0.82	0.8	0.85	0.84	0.87	0.9	0.87	0.86

The ratio of theoretical use (Table 7.3) to observed use (Table 7.4) in each relevant fleet segment has not been covered by the 70 % criterion for the past three years. The Belgian fleet segments are accordingly **in balance** as far as the 'ratio of theoretical to observed use' indicator is concerned.

7.2 BIOLOGICAL INDICATORS

7.2.1 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 below the 40 % limit for fleet segments DTS24-40 and PMP18-24.

Table 7.5: The stocks for which F and Fmsy are available as a percentage of turnover										
Fishing tech.	**Length cat.**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
DTS	VL2440	51 %	60 %	57 %	51 %	0.04 %	35 %	36 %	33 %	30 %
PMP	VL1824	89 %	50 %	44 %	50 %	0.00 %	51 %	29 %	38 %	25 %
TBB	VL1824	60 %	65 %	58 %	61 %	0.00 %	39 %	50 %	54 %	33 %
TBB	VL2440	63 %	67 %	66 %	63 %	0.05 %	60 %	65 %	61 %	59 %

The table shows that SHI complies with the minimum 40 % criterion only in respect of TBB18-24 and 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: SHI		SHI								
Fishing tech.	Length cat.	2008	2009	2010	2011	2012	2013	2014	2015	2016
DTS	VL2440	1.60	1.59	1.53	1.29	0.75	1.00	0.98	0.98	
PMP	VL1824	1.92	1.85	1.71	1.54	0.00	1.14	1.42	1.11	
TBB	VL1824	1.62	1.83	1.67	1.44	0.00	1.25	1.35	1.24	
TBB	VL2440	1.49	1.57	1.42	1.30	0.75	1.21	1.24	1.13	

The result is very different when SHI is calculated by dividing by total turnover:

Table 7.7: SHI (in relation to total turnover)		SHI (divided by value all stocks)								
Fishing tech.	Length cat.	2008	2009	2010	2011	2012	2013	2014	2015	2016
DTS	VL2440	0.87	1.03	0.92	0.72		0.42	0.42	0.34	
PMP	VL1824	1.80	1.04	0.86	0.82		0.70	0.43	0.42	
TBB	VL1824	1.02	1.22	1.00	0.90		0.51	0.69	0.67	
TBB	VL2440	1.00	1.12	0.99	0.86		0.76	0.84	0.71	

The purpose of the indicator is to reflect the economic dependence of fleet segments on stocks for which the fishing mortality rate is higher than Fmsy. 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, however.

Belgium considers that the picture that this presents of the economic dependence is very different from the reality based on the standard calculation.

The standard calculation method is the determining factor and an important point to be considered when the guidelines are discussed.

7.2.3 SAR

Table 7.8: Stocks at risk		SAR								
Fishing tech.	Length cat.	2008	2009	2010	2011	2012	2013	2014	2015	2016
DTS	VL2440	0	0	0	0	0	0	0	0	
PMP	VL1824	1	0	0	0	0	0	0	0	
TBB	VL1824	1	0	1	0	0	0	0	0	
TBB	VL2440	1	2	1	1	0	1	1	1	

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

Table 7.9: SAR - stocks		SAR - stocks								
Fishing tech.	Length cat.	2008	2009	2010	2011	2012	2013	2014	2015	2016
DTS	VL2440									
PMP	VL1824	cod-347d								
TBB	VL1824	ple-eche		ple-eche						
TBB	VL2440	sol-iris	sol-iris	sol-iris	sol-iris		sol-iris	sol-iris	sol-iris	
			ple-eche							

The indicator may be negative for fleet segment TBB24-40, given that SAR > 0 (see Tables 7.8 and 7.9).

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.

7.3 ECONOMIC INDICATORS

7.3.1 ROFTA(-LTIR)

Table 7.10: Return on fixed tangible assets		ROFTA								
Fishing tech.	Length cat.	2008	2009	2010	2011	2012	2013	2014	2015	2016
DTS	VL2440	-35.32	-8.17	-3.84	-10.90	-25.70	-16.38	-25.63	4.13	
PMP	VL1824	31.59	-9.64	-5.04	-131.97	75.98	9.07	2.93	-20.33	
TBB	VL1824	-53.12	-20.05	-14.39	-20.17	-17.14	-19.89	-14.16	-11.58	
TBB	VL2440	-34.56	-11.22	-3.80	8.26	-13.15	-13.00	2.87	22.49	

Table 7.11: ROFTA - low-risk long-term interest rate		ROFTA-LTIR								
Fishing tech.	Length cat.	2008	2009	2010	2011	2012	2013	2014	2015	2016
DTS	VL2440	-37.43	-10.29	-5.95	-13.01	-27.81	-18.49	-27.74	2.01	
PMP	VL1824	29.48	-11.75	-7.15	-134.08	73.87	6.96	0.82	-22.44	
TBB	VL1824	-55.24	-22.17	-16.50	-22.28	-19.25	-22.01	-16.27	-13.69	
TBB	VL2440	-36.68	-13.33	-5.91	6.15	-15.26	-15.11	0.76	20.38	

Only fleet segment TBB18-24 may have been in imbalance in accordance with the < 0 criterion for the past three years (see Table 7.11).

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

Table 7.12: Current revenue/break-even revenue		CR/BER								
Fishing tech.	Length cat.	2008	2009	2010	2011	2012	2013	2014	2015	2016
DTS	VL2440	-0.17	0.64	0.84	0.70	0.37	0.50	0.04	1.17	
PMP	VL1824	3.79	0.45	0.76	-0.18	1.82	1.53	1.18	0.21	
TBB	VL1824	-0.42	-0.06	0.39	0.11	0.12	0.04	0.51	0.62	
TBB	VL2440	0.09	0.61	0.87	1.25	0.63	0.66	1.07	1.66	

The status of CR/BER is similar to ROFTA-LTIR. Only fleet segment TBB18-24 has been covered by the < 1 criterion for the past three years (see Table 7.12).

The two economic indicators are in stark contrast to the standard Belgian 'profitability' economic indicator, which is supported by a very long time series (shown here only for 2009-2015). The indicator is calculated in accordance with the following formula:
Net profit (before tax) x 100 / turnover.

Although this indicator is calculated on the basis of a different aggregation of fishing vessels, it *is* representative of the actual economic situation. As evidence of this, the indicator is shown for the various components *and* the entire SFS, including segment TBB18-24. As similar trends can be observed within the SFS, this analysis is also considered to be reliable and representative of the difference in aggregation from the guidelines. Segment TBB18-24 corresponds most closely to 'SFS Eurocutters'.

Irrespective of the status of the indicator based on this criterion, Belgium considers the perception that fleet segment TBB18-24 is in imbalance to be incorrect. The reasons for the divergences when the ROFT-LTIR calculation method is used will have to be examined further and are an important point to be considered when the guidelines are discussed.

The examination will also have to be extended to other fleet segments (which, although not at present covered by the 'in imbalance' criteria, also display such divergences).

Table 7.15: Profitability indicator							
Group	2009	2010	2011	2012	2013	2014	2015
SFS – Coastal fishing boats (≤ 221 kW)	+6.3 %	+2.7 %	-4.0 %	+1.1 %	+12.2 %	+15.1 %	+10.5 %
SFS – Eurocutters (≤ 221 kW)	+8.5 %	+5.3 %	+3.7 %	+4.8 %	+7.8 %	+12.9 %	+17.0 %
SFS – Other vessels (≤ 221 kW)	+7.7 %	+5.6 %	+14.1 %	+3.5 %	-5.1 %	+22.4 %	+13.8 %
TOTAL, SFS (≤ 221 kW)	**+7.9 %**	**+4.6 %**	**+2.3 %**	**+3.8 %**	**+8.2 %**	**+14.0 %**	**+14.9 %**
LFS - Sheerlegs (≥ 662 kW)	+7.1 %	+11.7 %	+12.6 %	+1.3 %	+0.2 %	+6.8 %	+16.6 %
LFS – Other vessels (> 221 kW)	-5.2 %	+6.1 %	+8.9 %	+3.8 %	+3.1 %	+5.9 %	+8.6 %
TOTAL, LFS (> 221 kW)	**+6.3 %**	**+11.3 %**	**+12.3 %**	**+1.5 %**	**+0.5 %**	**+6.7 %**	**+15.9 %**