

# Fleet Report of The Netherlands for the year 2018

Following Art 22 of Regulation 1380/2013.

## Summary

The active fleet at 31-12-2018 was 103.510 GT en 246.939 KW; including the reserved capacity of 59.747 GT and 94.753 KW, hence the Dutch fleet has not and will not exceed the capacity ceiling.

## Fleet at 31-12-2018

	Nr of vessels	KW active	reserved KW	BT active	reserved BT
MFL1	524	214.464	83.329	94.786	55.378
MFL2	199	32.475	11.424	8.724	4.369

## Indicators

All the indicators in this report have been calculated using the formulas in *Guidelines for analysis of the balance between fishing capacity and fishing opportunities according to Art. 22 of Regulation 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy (COM(2014)545)* and updated in 2020 based on the methods used in the Balance STECF EWG 19-13 (see also Beukhof and Hamon 2020). Changes to the method used lead to small changes in the indicator value compared to last years report.

Although the SHI of the large beam trawler segments remains above 1, they show a decreasing trend throughout the time period, with values close to 1 in 2017 and 2018.

The SHI of the pelagic fleet segment seems to fluctuate around 1, with values above 1 in 2008-2010, 2017 and 2018, and values below 1 between 2011 and 2016. Because of the fluctuations of the SHI around 1, there is no clear indication that the SHI points towards structural overcapacity of the pelagic fleet, despite the current SHI being above 1.

The economic indicators of the Dutch fleet demonstrate a positive return of investment (ROI) well above the 5 year average interest rate since the year 2014 indicating that the fleet is viable in the long run.

## Conclusion

On basis of the indicators in this report the Netherlands will not initiate an action plan for structural adjustment of the fleet capacity.

## Part I

### Biological sustainability indicators for the Dutch demersal and pelagic fleet segments

Two biological indicators (Sustainable Harvest Indicator and Stock-at-risk indicator) are used to assess whether the Dutch fleet is relying on overfished stocks, and/or is involved in causing a high biological risk to a depleted stock. A detailed description of the calculations can be found in Beukhof and Hamon (2020). Calculation of the indicators depends on the availability of quantified scientific advice for the fish stocks in question. The indicators were calculated for each of the 11 active fleet segments. They are presented based on the clustered fleet segmentation following the economic and technical indicators.

#### 1.1. Sustainable Harvest Indicator

The Sustainable Harvest Indicator (SHI) was calculated based on the Dutch landing value per fleet segment in 2018. Values of  $F$  and  $F_{MSY}$  were taken from ICES stock advice, with the exception of Atlantic bluefin tuna, for which values were taken from ICCAT. For segments that have a  $SHI > 1$ , the underlying  $F$ ,  $F_{MSY}$  and landing values are presented.

#### Pelagic fleet

Splitting of the landings data of herring in ICES sub-division 4a over the two stocks in this area was done by assigning all catches to North Sea herring (her.27.3a47d), as the Dutch pelagic fleet has not been catching any Norwegian spring spawning herring (her.27.1-24a514a) in this area in recent years. Note that this is different from the splitting factors from Annex IV in STECF-19-13. The SHI for the pelagic fleet segment in 2018 is 1.03 (Table 1). Table 2 presents the underlying  $F$ ,  $F_{MSY}$  and landing value of the stocks, as well as the cumulative proportion of the total landing value. The latter indicates that North Sea herring contributed the most to the SHI, as it had the highest landing value and proportion (36%), followed by blue whiting (34%; whb.27.1-9121 ) and mackerel (17%; mac.27.nea).

Table 1. The SHI for the pelagic fleet in 2018, the number of stocks included in the analysis and the percentage of landings value for which stock assessment data was available.

Fleet segment	SHI	Number of stocks included	Percentage of landings value with stock assessment data available
NLD-NAO-TM-VL40XX-NGI	1.03	16	90

Table 2.  $F$ ,  $F_{MSY}$ , ratio of  $F$  over  $F_{MSY}$ , landing value and cumulative proportion of stocks of the pelagic fleet segment in terms of total landing value. The stocks are list from highest to lowest cumulative contribution. To calculate the SHI, the  $F/F_{MSY}$  ratios are weighted by the landing value per stock. Table continues on the next page.

Stock	F	$F_{MSY}$	$F/F_{MSY}$	Landing value (€)	Cumulative proportion
her.27.3a47d	0.21	0.26	0.80	37,288,615	0.357
whb.27.1-91214	0.39	0.32	1.23	35,218,144	0.693
mac.27.nea	0.24	0.23	1.03	17,733,152	0.863
hom.27.2a4a5b6a7a-ce-k8	0.09	0.07	1.18	12,522,631	0.983
her.27.1-24a514a	0.13	0.16	0.82	1,448,486	0.996
her.27.irls	0.33	0.26	1.28	153,337	0.998
hke.27.3a46-8abd	0.22	0.27	0.81	134,141	0.999
pok.27.3a46	0.36	0.36	0.99	41,252	1
had.27.46a20	0.22	0.19	1.18	19,679	1

whg.27.47d	0.20	0.17	1.16	11,943	1
had.27.7b-k	0.77	0.40	1.93	2,399	1
bss.27.4bc7ad-h	0.08	0.17	0.46	2,075	1
whg.27.7b-ce-k	0.62	0.52	1.19	2,017	1
whg.27.6a	0.05	0.18	0.29	1,475	1
ple.27.420	0.19	0.21	0.89	13	1
cod.27.47d20	0.63	0.31	2.03	2	1

### Large beam trawlers

The SHI for both large beam trawler segments in 2018 is 1.02 (Table 3). The percentage of landing value with stock assessment data is lower for the 24-40m category, as this fleet segment catches also brown shrimp (*Crangon crangon*) for which there is no assessment available. The stocks that contributed together at least 75% to the total landing value are sole (sol.27.4) and plaice (ple.27.420) in the North Sea (Table 4, Table 5). Note that Norway lobster (*Nephrops norvegicus*) was also caught by the 24-40m segment, but this species was not yet taken into account in the analysis, as landings information and stock assessment Functional Units do not align. Future fleet reports should ensure that this species is taken into account and depends on a transparent process from the ICES stock assessors of linking landings by ICES rectangles to Functional Units.

Table 3. The SHI for the large beam trawler fleet segments in 2018, the number of stocks included in the analysis and the percentage of landings value for which stock assessment data was available.

Fleet segment	SHI	Number of stocks included	Percentage of landing value with stock assessment data available
NLD-NAO-TBB-VL2440-NGI	1.02	12	71
NLD-NAO-TBB-VL40XX-NGI	1.02	12	92

Table 4.  $F$ ,  $F_{MSY}$ , ratio of  $F$  over  $F_{MSY}$ , landing value and cumulative proportion of stocks of the large beam trawler segment between 24-40m in terms of total landing value. The stocks are list from highest to lowest cumulative contribution. To calculate the SHI, the  $F/F_{MSY}$  ratios are weighted by the landing value per stock.

Stock	$F$	$F_{MSY}$	$F/F_{MSY}$	Landing value (€)	Cumulative proportion
sol.27.4	0.22	0.20	1.09	12,587,059	0.570
ple.27.420	0.19	0.21	0.89	6,652,738	0.871
tur.27.4	0.36	0.36	0.99	2,652,283	0.991
cod.27.47d20	0.63	0.31	2.03	93,646	0.995
whg.27.47d	0.20	0.17	1.16	34,778	0.997
sol.27.20-24	0.23	0.23	1.01	28,225	0.998
bss.27.4bc7ad-h	0.08	0.17	0.46	17,626	0.999
wit.27.3a47d	0.24	0.15	1.54	11,175	1
hke.27.3a46-8abd	0.22	0.27	0.81	6,044	1
had.27.46a20	0.22	0.19	1.18	1,344	1
pok.27.3a46	0.36	0.36	0.99	1,006	1
mac.27.nea	0.24	0.23	1.03	197	1

Table 5.  $F$ ,  $F_{MSY}$ , ratio of  $F$  over  $F_{MSY}$ , landing value and cumulative proportion of stocks of the large beam trawler segment >40m in terms of total landing value. The stocks are list from highest to lowest cumulative contribution. To calculate the SHI, the  $F/F_{MSY}$  ratios are weighted by the landing value per stock. Table continues on the next page.

Stock	F	$F_{MSY}$	$F/F_{MSY}$	Landing value (€)	Cumulative proportion
sol.27.4	0.22	0.20	1.09	68,309,276	0.556
ple.27.420	0.19	0.21	0.89	40,067,117	0.882
tur.27.4	0.36	0.36	0.99	12,887,735	0.987
cod.27.47d20	0.63	0.31	2.03	469,025	0.991
sol.27.20-24	0.23	0.23	1.01	445,875	0.994
whg.27.47d	0.20	0.17	1.16	237,954	0.996
bss.27.4bc7ad-h	0.08	0.17	0.46	220,892	0.998
wit.27.3a47d	0.24	0.15	1.54	199,863	1
hke.27.3a46-8abd	0.22	0.27	0.81	25,607	1
had.27.46a20	0.22	0.19	1.18	17,273	1
pok.27.3a46	0.36	0.36	0.99	7,144	1
mac.27.nea	0.24	0.23	1.03	267	1

### Small beam trawlers

The percentage of landing value for the two small beam trawler segments (vessel length 12-18m and 18-24m) with stocks for which stock assessment data was available was very low, and therefore, no SHI was calculated (Table 6). These low percentages could be explained by the large amount of landings of brown shrimp and bivalves, for which there are no stock assessments. Furthermore, the 18-24m segment also catches Norway lobster, which was not included in the analysis. Future fleet reports should ensure that this species is taken into account, as is discussed above.

Table 6. The SHI for the small beam trawler fleet segments in 2018, the number of stocks included in the analysis and the percentage of landings value for which stock assessment data was available. Hyphen indicates this percentage was <60%, and therefore, no SHI was calculated.

Fleet segment	SHI	Number of stocks included	Percentage of landing value with stock assessment data available
NLD-NAO-TBB-VL1218-NGI	-	9	1
NLD-NAO-TBB-VL1824-NGI	-	11	14

### Demersal trawlers

The percentage of landing value for the two demersal trawler segments (vessel length 18-24 and 24-40m) with stocks for which stock assessment data was available was very low, and therefore, no SHI was calculated (Table 7). These low percentages could be explained by the large amount of landings of brown shrimp and European squid (*Loligo vulgaris*), which are not scientifically assessed. Furthermore, both segment also catch Norway lobster, which was not included in the analysis. Future fleet reports should ensure that this species is taken into account, as is discussed above.

Table 7. The SHI for the demersal trawler fleet segments in 2018, the number of stocks included in the analysis and the percentage of landings value for which stock assessment data was available. Hyphen indicates this percentage was <60%, and therefore, no SHI was calculated.

Fleet segment	SHI	Number of stocks included	Percentage of landing value with stock assessment data available
NLD-NAO-DTS-VL1824-NGI	-	12	45
NLD-NAO-DTS-VL2440-NGI	-	23	50

### Small scale fleet

The small scale fleet consists of the small beam trawlers (0-10m), the drift and fixed nets segments (18-24m), and two passive gear segments (0-10m and 10-12m). For drift and fixed nets segment and the small beam trawl segment, the landings value of stocks with data on  $F$  and  $F_{MSY}$  was less than 60% of the total landings value for these segments, and therefore, no SHI was calculated (Table 8). This was mostly due to lack of assessment data for brown shrimp and brown crab (*Cancer pagurus*). For the 0-10m and 10-12m passive gear segments the SHI for 2018 was calculated to be 0.51 and 0.96, respectively.

Table 8. The SHI for the small scale fleet in 2018, the number of stocks included in the analysis and the percentage of landings value for which stock assessment data was available. Hyphen indicates this percentage was <60%, and therefore, no SHI was calculated.

Fleet segment	SHI	Number of stocks included	Percentage of landings value with stock assessment data available
NLD-NAO-PG-VL0010-NGI	0.51	9	77
NLD-NAO-PG-VL1012-NGI	0.96	8	94
NLD-NAO-DFN-VL1824-NGI	-	7	20
NLD-NAO-TBB-VL0010-NGI	-	9	13

### Time series of SHI

Figure 1 shows the trend in SHI for the segments for which the SHI was calculated for 2018. The 2018 data are the values calculated in this fleet report, whereas the remaining values come from STECF-19-13. Although the SHI of the large beam trawler segments remains above 1, they show a decreasing trend throughout the time period, with values close to 1 in 2017 and 2018.

The SHI of the pelagic fleet segment seems to fluctuate around 1, with values above 1 in 2008-2010, 2017 and 2018, and values below 1 between 2011 and 2016. The lack of a trend reflects the often fluctuating trends observed in the SSB and recruitment of small pelagic species as well as the uncertainty in the assessment of the stocks itself. Because of the fluctuations of the SHI around 1, there is no clear indication that the SHI points towards structural overcapacity of the pelagic fleet, despite the current SHI being above 1.

The SHI of the passive gear segment 0-10m (part of the small scale fleet) fluctuates around 1.5 in the beginning of the study period and decreases to values below 1 thereafter. The SHI of the 10-12m passive gear segment shows a steady decline from SHI >2 in the first years of the study period to 0.96 in 2018.

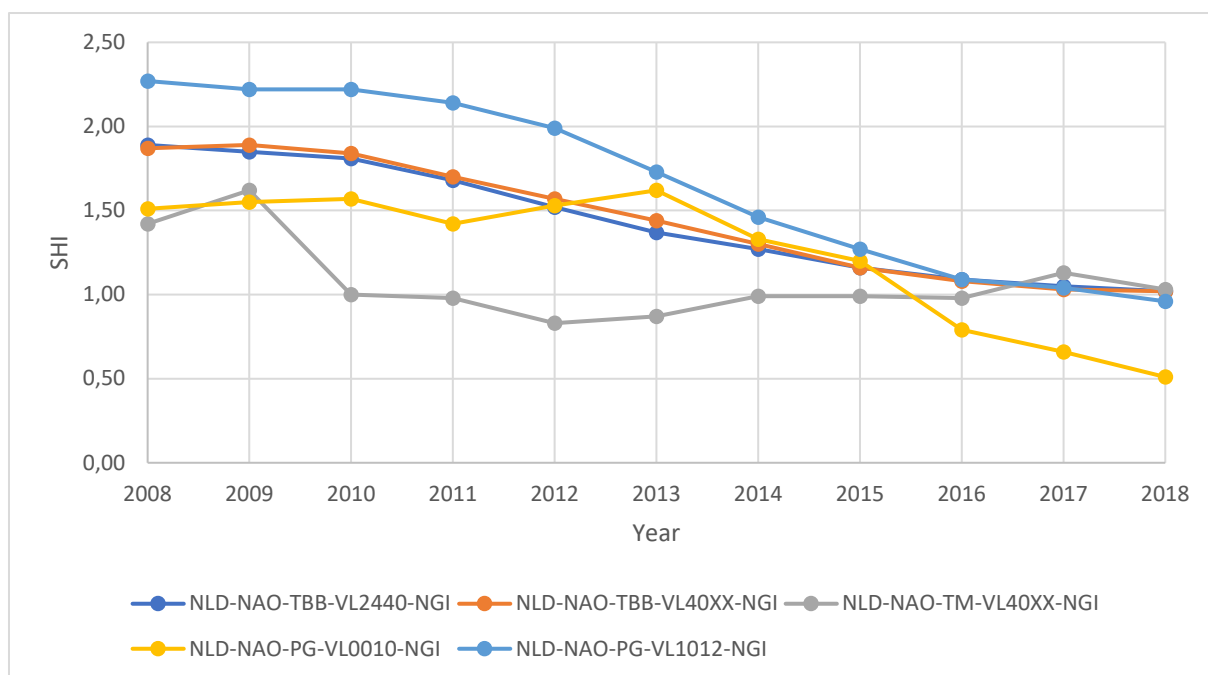


Figure 1. Trends in the Sustainable Harvest Indicator (SHI) from 2008 to 2018 for the fleet segments (pelagic, large beam trawlers and passive gear) that were calculated in this report. Data from 2009-2017 come from STECF-19-13, whereas the values of 2018 are from this fleet report.

## 1.2. Stock-at-risk indicator

The stock-at-risk (SAR) indicator was calculated based on the Dutch landings (in weight) per fleet segment in 2018 and total landings per stock as estimated by ICES (or ICCAT in case of Atlantic bluefin tuna). Values of SSB and  $B_{lim}$  were taken from ICES stock advice (or ICCAT). At the time of writing, no total landings across all countries for 2018 were available for spurdog (*Squalus acanthias*; dgs.27.nea; stock at biological risk according to criterium B). It was therefore not possible to check for criterium 2 for this stock. As for the SHI, Norway lobster was not yet taken into account in the SAR analysis either. Future reports should ensure this species is taken into account.

### Pelagic fleet

The number of stocks at risk for the pelagic fleet in 2018 was 1 (Table 9), as the SSB of Western horse mackerel (hom.27.2a4a5b6a7a-ce-k8) was below  $B_{lim}$  (criterium A) and the landings by the fleet comprised of more than 10% of the total landings of the stock (criterium 2). However, another exploited stock by the pelagic fleet (that is when criterium 1 and/or 2 is/are met) could be potentially at risk. Herring West of Scotland and West of Ireland (her.27.6a7bc) has a zero catch advice in terms of commercial catches. However, it has a monitoring TAC of 5800 t for scientific purposes. It is therefore argued that this stock should not be included in the SAR indicator for the pelagic fleet, as the landings fall under the monitoring TAC.

Table 9. The stock-at-risk (SAR) indicator for the pelagic fleet segment in 2018, and the corresponding stocks at risk. The stocks in parentheses suggest another SAR value and more stocks at risk, but it is argued in the text why these stocks should not or cannot yet be included in the SAR indicator.

Fleet segment	SAR	Stocks at risk
NLD-NAO-TM-VL40XX-NGI	1	hom.27.2a4a5b6a7a-ce-k8 (her.27.6a7bc)

### Large beam trawlers

The number of stocks at risk for the large beam trawler segments was 1 for the 24-40m segment, and 0 for the >40m segment (Table 10). The stock at risk for the 24-40m segment was the common skate complex (consisting of common blue skate and flapper skate) in the North Sea, Skagerrak and

Kattegat (rjb.27.3a4), as the landings by the fleet segment comprised more than 10% of the total landings of the stock (criterion 2), no landings are allowed (criterion C) and the species are listed on the IUCN Red List as critically endangered (criterion D).

Table 10. The stock-at-risk (SAR) indicator for the large beam trawler segments in 2018, and the corresponding stocks at risk. Hyphen indicates that no stocks at risk were identified.

Fleet segment	SAR	Stocks at risk
NLD-NAO-TBB-VL2440-NGI	1	rjb.27.3a4
NLD-NAO-TBB-VL40XX-NGI	0	-

### Small beam trawlers

No stocks at risk were identified for the two small beam trawler segments (Table 11).

Table 11. The stock-at-risk (SAR) indicator for the small beam trawler segments in 2018, and the corresponding stocks at risk. Hyphen indicates that no stocks at risk were identified.

Fleet segment	SAR	Stocks at risk
NLD-NAO-TBB-VL1218-NGI	0	-
NLD-NAO-TBB-VL1824-NGI	0	-

### Demersal trawlers

No stocks at risk were identified for the 18-24m demersal trawler segment, whereas one stock at risk was identified for the 24-40m segment (Table 12). This was the common skate complex, which was also identified to be at risk for the 24-40m beam trawlers. Similarly, landings by the demersal trawler segment comprised more than 10% of the total landings of the stock.

Table 12. The stock-at-risk (SAR) indicator for the demersal trawler segments in 2018, and the corresponding stocks at risk. Hyphen indicates that no stocks at risk were identified.

Fleet segment	SAR	Stocks at risk
NLD-NAO-DTS-VL1824-NGI	0	-
NLD-NAO-DTS-VL2440-NGI	1	rjb.27.3a4

### Small scale fleet

No stocks at risk were identified for the small scale fleet segments (Table 13).

Table 13. The stock-at-risk (SAR) indicator for the small scale fleet segments in 2018, and the corresponding stocks at risk. Hyphen indicates that no stocks at risk were identified.

Fleet segment	SAR	Stocks at risk
NLD-NAO-PG-VL0010-NGI	0	-
NLD-NAO-PG-VL1012-NGI	0	-
NLD-NAO-DFN-VL1824-NGI	0	-
NLD-NAO-TBB-VL0010-NGI	0	-

To summarize the results of the biological indicators:

- The pelagic fleet has a SHI value slightly above 1 and exploits 1 stock at risk. The SHI of the pelagic fleet seems to fluctuate around 1 (2008-2018).
- The large beam trawler segments have a SHI slightly above 1. These 2018 values contribute to the declining trend in SHI since 2008. The 24-40m beam trawler segment exploits 1 stock at risk, whereas this is 0 for the >40m beam trawler segment.
- The passive gear fleet segments (belonging to the small scale fleet) had SHI values below 1 and did not exploit any stocks at risk.

- The SHI could not be calculated for the small beam trawler segments, the demersal trawler segments, the drift/fixed net segment and the small scale beam trawl segment.
- One of the two demersal trawler segments exploits 1 stock at risk, whereas this is 0 for the other segment.
- None of the small beam trawlers and small scale fleet segments exploit stocks at high biological risk.

Uncertainties around the biological indicators:

- The estimates of  $F$  and  $F_{MSY}$  depend on the quality of the assessment. Many of the stock assessments used to define the  $F/F_{MSY}$  ratio are uncertain, and some are even highly uncertain, such as horse mackerel and cod. This affects the calculation of SHI. Longer trends in SHI values are therefore useful to interpret any potential fleet over-capacity.
- Fisheries advice aims to fish stocks at or below  $F_{MSY}$ . Given the uncertain nature of estimation of stock size and exploitation rate, it is to be expected that, looking back,  $F$  exceeds  $F_{MSY}$  in some years while management was in line with  $F_{MSY}$  advice. Longer-term perspectives on SHI are indicative of constant over- or underexploitation of target species.
- Due to the schooling nature of rays and skates, bycatch of these species is likely to be binary over the years (absent vs present). Especially for stocks for which a 0-TAC is issued, like the common skates, an incidental bycatch triggers SAR to take a value of 0, while measured over slightly longer periods one would conclude that bycatches are minimal.

## References

Beukhof, E. & Hamon, K. (2020). Indicators of the balance between fleet capacity and fishing opportunities: discrepancies between the Dutch national fleet report and STECF. Wageningen Marine Research report C045/20, Wageningen University & Research, 29 p.

Scientific, Technical and Economic Committee for Fisheries (STECF) – Assessment of balance indicators for key fleet segments and review of national reports on Member States efforts to achieve balance between fleet capacity and fishing opportunities (STECF-19-13); Publications Office of the European Union, Luxembourg.



## Part II

### Economic and social indicators for the 2018 Dutch fleet

There were 721 vessels in the Dutch fleet in 2018 (724 vessels in 2019), that were allowed to fish commercially in marine waters. From these vessels 522 were considered active based on logbook information (see Table 1). The active fleet is then split into several fleets, the small scale and coastal fishery, the small and large beamtrawlers (<24m or >24m), the demersal trawlers and the pelagic trawlers. Except for the pelagic trawlers, those fleets are themselves made of several segments defined by the data collection framework (DCF) and used by STECF. Because of data trustworthiness and economic importance, the small scale and coastal fleet was previously excluded from the economic part of the fleet report. The fleet segments which include the main fleets (commercially active cutters and trawlers) consisted of 312 vessels and cumulated about 99% of the landings value in 2019.

Since 2017, three small scale segments have been pooled with others because the number of vessels fell below the threshold of 10 vessels used to protect confidentiality of data. The DFN\_VL1218 was clustered with DFN\_VL1824, DTS\_VL0010 with TBB\_VL0010 and DRB\_VL2440 with TBB\_VL1218 in the small beamtrawler fleet. Those choices were made to pool the fleets with fleets with as similar cost structures as possible.

Table 14: Number of vessels per fleet (in grey) and disaggregated by STECF segment.

Fleet	2012	2013	2014	2015	2016	2017	2018	2019
Small scale and coastal	248	254	248	232	231	219	210	206
DFN_VL1218	12	13	13	8	8	-	-	-
DFN_VL1824	13	9	10	7	7	13	17	17
DRB_VL2440	8	7	8	8	8	-	-	-
DTS_VL0010	14	15	13	10	12	-	-	-
PG_VL0010	169	179	167	165	162	161	157	158
PG_VL1012	15	12	17	17	19	18	18	17
TBB_VL0010	17	19	20	17	15	27	18	14
Small beamtrawlers	169	171	176	174	174	178	184	171
TBB_VL1218	18	14	17	17	19	23	23	23
TBB_VL1824	151	157	159	157	155	155	161	148
Large beamtrawlers	84	86	79	77	83	85	88	86
TBB_VL2440	27	32	27	24	28	27	28	25
TBB_VL40XX	57	54	52	53	55	58	60	61
Demersal trawlers	35	27	32	36	32	35	33	49
DTS_VL1824	13	9	10	12	9	8	5	17
DTS_VL2440	22	18	22	24	23	27	28	32
Pelagic trawlers	12	13	10	7	7	8	7	6
TM_VL40XX	12	13	10	7	7	8	7	6

All the indicators in this chapter have been calculated using the formulas in *Guidelines for analysis of the balance between fishing capacity and fishing opportunities according to Art. 22 of Regulation 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy (COM(2014)545)* and updated in 2020 based on the methods used in the

Balance STECF EWG 19-13 (see also Beukhof and Hamon 2020). Changes to the method used lead to small changes in the indicator value compared to last years report. Those changes include i) using real values adjusted for inflation using the consumer price index, ii) opportunity costs of capital are calculated using real interest rate and iii) the return on investment (ROI) should be compared to the 5 year average interest rate. The real interest rate used to calculate opportunity costs of capital and the 5 years average low risk long term interest rate are shown below in table 2.

*Table 15: Inflation, interest rate, real interest rate, 5 year average low risk long term interest rate and consumer price index for the Netherlands. sources: Eurostat and ECB*

indicator	2012	2013	2014	2015	2016	2017	2018
inflation	2.80	2.60	0.30	0.20	0.10	1.30	1.60
interest rate	1.93	1.96	1.45	0.69	0.29	0.52	0.58
real interest rate	-0.85	-0.62	1.15	0.49	0.19	-0.77	-1.00
5yr average interest rate	3.17	2.71	2.26	1.80	1.26	0.98	0.71
consumer price index	0.97	0.99	1.00	1.00	1.00	1.01	1.03

Below the results for specific segments are discussed in more detail.

## Economic indicators

The economic indicators are calculated in real terms with 2015 as base year (see Table 2 for the consumer index price used for the calculations), this leads to small differences with the indicators produced last year. All differences in method and results are detailed in Beukhof and Hamon (2020).

### Total fleet

The economic indicators of the Dutch fleet demonstrate a positive return of investment (ROI) well above the 5 year average interest rate since the year 2014 indicating that the fleet is viable in the long run. The negative ROI and very low ratio of current revenue over break-even revenue (CR/BER) before 2014 were caused by the economic results of the pelagic fleet segment. The social indicators of the total fleet are positive with the average crew costs per full time equivalent (FTE) above the average Dutch gross salary<sup>1</sup> and a gross value added (GVA) of more than 219 million euro in 2018.

*Table 16: Economic and social indicators total Dutch fleet. ROI: Return on Investment in %, CR/BER: current revenue over break-even revenue, NPM: net profit margin in %, Crew Costs/FTE: crew costs per full time equivalent in thousand euro and GVA: gross value added in million euro*

Indicators	2012	2013	2014	2015	2016	2017	2018
ROI	-3.20	-1.70	4.60	5.40	15.30	12.90	13.40
CR/BER	0.86	0.94	1.39	1.44	2.11	1.89	1.74
NPM	-2.90	-1.40	8.30	8.90	20.40	17.00	13.50
Crew Costs/FTE	57.60	59.20	63.50	71.10	92.10	78.40	80.10
GVA	131.80	150.80	182.60	184.40	283.80	238.60	219.40

<sup>1</sup> Average Dutch labour cost was around EUR 59 k/year in 2018

<https://opendata.cbs.nl/statline/#/CBS/nl/dataset/84163NED/table?ts=1558951433485>

## Small scale and coastal fleets

This section was added in 2020 to allow comparison with the balance report of STECF. The economic data for these fleets are collected using questionnaires and the quality is highly variable between years. In 2018, 210 vessels were operating in the small scale and coastal fisheries. They are a heterogeneous group of vessels, including mainly smaller vessels, vessel using active gears with an annual fishing revenue lower than EUR 50 k, vessels using passive gears and vessels fishing for shellfish. In 2018, the small scale and coastal fleets represented about 1% of the total Dutch value of landings. For the past two years, the economic indicators have been in balance for most of the smallscale and coastal fleets expect for the TBB\_VL0010. The high year-to-year and between segments variability is likely due to the quality of the data rather than real changes in the fleet.

*Table 17: Economic and social indicators small scale and coastal fleet (in grey) and for all the STECF segments in that cluster. ROI: Return on Investment in %, CR/BER: current revenue over break-even revenue, NPM: net profit margin in %, Crew Costs/FTE: crew costs per full time equivalent in thousand euro and GVA: gross value added in million euro . Missing values for 2017 and 2018 for some segments are due to the aggregation of the fleets with less than 10 vessels with larger fleets.*

Fleet	Indicators	2012	2013	2014	2015	2016	2017	2018
<b>Small scale and coastal</b>	<b>ROI</b>	<b>1.90</b>	<b>14.90</b>	<b>29.30</b>	<b>17.40</b>	<b>-30.50</b>	<b>4.40</b>	<b>11.20</b>
DFN_VL1218	ROI	1.20	1.10	1.50	1.70	1.30	-	-
DFN_VL1824	ROI	-3.80	19.60	8.30	9.50	-21.20	3.20	5.50
DRB_VL2440	ROI	3.30	508.40	679.00	104.80	-115.50	-	-
DTS_VL0010	ROI	-5.20	-4.10	-1.10	-3.10	-8.10	-	-
PG_VL0010	ROI	6.00	3.50	10.00	13.70	9.20	7.00	19.50
PG_VL1012	ROI	7.50	4.00	9.30	11.80	7.00	6.30	20.40
TBB_VL0010	ROI	-4.50	1.50	9.00	15.40	-5.70	-0.20	-4.60
<b>Small scale and coastal</b>	<b>CR/BER</b>	<b>1.56</b>	<b>2.49</b>	<b>4.62</b>	<b>3.25</b>	<b>-0.20</b>	<b>1.70</b>	<b>2.49</b>
DFN_VL1218	CR/BER	1.64	1.44	1.65	2.65	2.18	-	-
DFN_VL1824	CR/BER	0.99	3.97	2.13	1.83	-0.10	2.73	2.22
DRB_VL2440	CR/BER	2.31	32.72	70.36	9.02	-1.43	-	-
DTS_VL0010	CR/BER	0.03	0.19	0.76	0.18	0.09	-	-
PG_VL0010	CR/BER	1.87	1.44	1.65	2.65	2.18	1.73	2.91
PG_VL1012	CR/BER	1.93	1.44	1.65	2.65	2.18	1.73	2.91
TBB_VL0010	CR/BER	0.45	0.97	1.84	2.90	0.18	1.05	0.31
<b>Small scale and coastal</b>	<b>NPM</b>	<b>9.40</b>	<b>23.70</b>	<b>51.50</b>	<b>25.40</b>	<b>-29.90</b>	<b>22.40</b>	<b>32.30</b>
DFN_VL1218	NPM	11.40	10.60	18.10	37.80	31.20	-	-
DFN_VL1824	NPM	-0.10	33.20	39.10	10.50	-115.60	36.00	25.00
DRB_VL2440	NPM	8.00	43.50	72.80	18.10	-42.10	-	-
DTS_VL0010	NPM	-655.30	-179.70	-23.00	-249.20	-81.00	-	-
PG_VL0010	NPM	19.60	10.60	18.10	37.80	31.20	22.70	37.60
PG_VL1012	NPM	22.20	10.60	18.10	37.80	31.20	22.70	37.60
TBB_VL0010	NPM	-20.80	-1.50	33.50	36.20	-37.40	3.00	-72.50
<b>Small scale and coastal</b>	<b>Crew Costs/FTE</b>	<b>33.60</b>	<b>17.50</b>	<b>14.90</b>	<b>29.20</b>	<b>91.10</b>	<b>11.90</b>	<b>18.60</b>
DFN_VL1218	Crew Costs/FTE	28.40	12.40	11.90	7.40	6.70	-	-
DFN_VL1824	Crew Costs/FTE	74.90	12.60	4.50	32.70	76.50	14.10	42.50
DRB_VL2440	Crew Costs/FTE	174.10	61.40	71.60	123.90	819.90	-	-

Fleet	Indicators	2012	2013	2014	2015	2016	2017	2018
DTS_VL0010	Crew Costs/FTE	1.90	2.30	2.00	2.50	30.50	-	-
PG_VL0010	Crew Costs/FTE	16.10	12.40	11.90	7.40	6.70	10.90	15.40
PG_VL1012	Crew Costs/FTE	13.80	12.40	11.90	7.40	6.70	10.90	15.40
TBB_VL0010	Crew Costs/FTE	32.90	11.90	4.90	39.60	59.50	28.00	16.00
<b>Small scale and coastal</b>	<b>GVA</b>	<b>8.40</b>	<b>6.70</b>	<b>12.00</b>	<b>8.30</b>	<b>8.90</b>	<b>2.90</b>	<b>5.20</b>
DFN_VL1218	GVA	0.40	0.20	0.20	0.10	0.10	-	-
DFN_VL1824	GVA	1.30	0.60	0.50	0.30	0.20	0.40	1.10
DRB_VL2440	GVA	2.60	3.10	7.80	4.30	5.60	-	-
DTS_VL0010	GVA	-0.00	-0.00	0.20	0.00	0.20	-	-
PG_VL0010	GVA	3.60	2.50	2.40	2.90	2.10	2.10	3.70
PG_VL1012	GVA	0.30	0.20	0.20	0.40	0.20	0.20	0.40
TBB_VL0010	GVA	0.30	0.20	0.70	0.30	0.50	0.30	0.00

### Beamtrawlers shorter than 24 meters

In 2018 the fleet segment beamtrawlers shorter than 24 meters consists of 184 vessels fishing mainly for shrimps (74% of their fishing revenue in 2018) and sole (10% of the revenue in 2018). The return of investment for the small beamtrawlers has been high since 2012 with extreme values in 2016 because of high shrimp prices. The ratio of current revenue over break-even revenue shows a similar pattern indicating a viable segment. During the same period, the average crew wage was higher than the Dutch minimum salary<sup>2</sup> and Dutch average wage<sup>1</sup>. The GVA of the small beamtrawlers is positive, indicating that the fleet has a value for society, in 2018 it still represented 27% of the total GVA for the Dutch fleet. The large fluctuations in the values for the segment of beam trawlers 12-18 meters is partly due to the high variability in the data for this segment.

*Table 18: Economic and social indicators small beam trawl fleet (in grey) and from the STECF segments in that cluster. ROI: Return on Investment in %, CR/BER: current revenue over break-even revenue, NPM: net profit margin in %, Crew Costs/FTE: crew costs per full time equivalent in thousand euro and GVA: gross value added in million euro*

Fleet	Indicators	2012	2013	2014	2015	2016	2017	2018
<b>Small beamtrawlers</b>	<b>ROI</b>	<b>13.20</b>	<b>12.80</b>	<b>10.30</b>	<b>9.80</b>	<b>44.60</b>	<b>18.60</b>	<b>19.80</b>
TBB_VL1218	ROI	-2.30	-5.90	-7.30	-8.30	10.10	90.50	29.20
TBB_VL1824	ROI	14.10	13.60	11.40	10.50	46.50	15.10	18.10
<b>Small beamtrawlers</b>	<b>CR/BER</b>	<b>1.51</b>	<b>1.51</b>	<b>1.45</b>	<b>1.48</b>	<b>3.16</b>	<b>1.87</b>	<b>1.85</b>
TBB_VL1218	CR/BER	0.93	0.82	0.68	0.77	1.39	4.35	3.14
TBB_VL1824	CR/BER	1.54	1.55	1.50	1.52	3.29	1.71	1.72
<b>Small beamtrawlers</b>	<b>NPM</b>	<b>10.80</b>	<b>9.50</b>	<b>10.10</b>	<b>11.50</b>	<b>29.40</b>	<b>16.80</b>	<b>16.10</b>
TBB_VL1218	NPM	-2.20	-6.50	-16.40	-10.90	11.60	28.70	27.10
TBB_VL1824	NPM	11.30	10.00	10.90	12.20	29.90	15.00	14.30
<b>Small beamtrawlers</b>	<b>Crew Costs/FTE</b>	<b>54.00</b>	<b>64.60</b>	<b>55.70</b>	<b>55.80</b>	<b>105.30</b>	<b>77.90</b>	<b>75.50</b>
TBB_VL1218	Crew Costs/FTE	34.40	32.40	22.40	28.60	50.40	58.80	77.70
TBB_VL1824	Crew Costs/FTE	55.30	66.50	58.10	57.30	109.30	82.00	75.20
<b>Small beamtrawlers</b>	<b>GVA</b>	<b>34.20</b>	<b>43.50</b>	<b>41.70</b>	<b>39.70</b>	<b>91.50</b>	<b>62.10</b>	<b>58.20</b>
TBB_VL1218	GVA	1.10	1.00	0.90	0.80	2.50	9.40	9.10

<sup>2</sup> Minimum Dutch salary is about EUR 20 k/year bruto in 2018 <https://www.salaris-informatie.nl/wettelijk-minimumloon#1-juli-2018>

Fleet	Indicators	2012	2013	2014	2015	2016	2017	2018
TBB_VL1824	GVA	33.10	42.50	40.80	38.90	89.00	52.60	49.10

### Large beamtrawlers

The large beamtrawlers consisted of 88 vessels fishing mainly flatfish in 2018, sole and plaice representing almost 77 % of the value of their landings in 2018 (78% in 2019). The segment of vessels between 24-40 meter is a heterogeneous group consisting of a number of so-called eurocutters (vessels of around 24 meter and an engine power of 221 kw) and a group of vessels of little less than 40 m and an engine power of 1471 kw). Since 2012 the average ROI has been positive and the fleet has revenues well above the break even revenue. This was mainly due to the lower fuel costs and the transition to innovative pulse gears, but also the increased fish prices. The high ROI since 2014 and the fact that the current revenue is much higher than the break-even revenue indicates an economically very viable segment. The social indicators show that the average crew cost per FTE is higher than the average Dutch salary<sup>1</sup>. The GVA of the large beam trawler is positive and contributes to 38% of the total GVA for the Dutch fleet. It is expected that with the prohibition of the pulse gear, the economic and social indicators for these segments will decrease in the coming years.

*Table 19: Economic and social indicators small beam trawl fleet (in grey) and from the STECF segments in that cluster. ROI: Return on Investment in %, CR/BER: current revenue over break-even revenue, NPM: net profit margin in %, Crew Costs/FTE: crew costs per full time equivalent in thousand euro and GVA: gross value added in million euro*

Fleet	Indicators	2012	2013	2014	2015	2016	2017	2018
<b>Large beamtrawlers</b>	<b>ROI</b>	<b>3.10</b>	<b>4.90</b>	<b>11.00</b>	<b>13.90</b>	<b>17.60</b>	<b>13.90</b>	<b>19.60</b>
TBB_VL2440	ROI	3.60	4.00	8.70	14.40	27.00	19.50	14.20
TBB_VL40XX	ROI	3.00	5.10	11.50	13.90	16.00	13.00	20.60
<b>Large beamtrawlers</b>	<b>CR/BER</b>	<b>1.26</b>	<b>1.42</b>	<b>2.00</b>	<b>2.58</b>	<b>3.25</b>	<b>2.70</b>	<b>2.39</b>
TBB_VL2440	CR/BER	1.21	1.25	1.54	2.00	2.97	2.28	1.62
TBB_VL40XX	CR/BER	1.27	1.48	2.18	2.78	3.35	2.84	2.62
<b>Large beamtrawlers</b>	<b>NPM</b>	<b>4.30</b>	<b>7.00</b>	<b>16.30</b>	<b>23.70</b>	<b>28.30</b>	<b>23.50</b>	<b>19.60</b>
TBB_VL2440	NPM	4.00	4.90	11.40	19.20	27.40	20.80	11.00
TBB_VL40XX	NPM	4.40	7.60	17.60	24.90	28.50	24.20	21.60
<b>Large beamtrawlers</b>	<b>Crew Costs/FTE</b>	<b>60.50</b>	<b>62.40</b>	<b>68.90</b>	<b>79.80</b>	<b>93.70</b>	<b>83.20</b>	<b>84.60</b>
TBB_VL2440	Crew Costs/FTE	54.50	54.90	53.70	63.40	88.90	83.00	71.60
TBB_VL40XX	Crew Costs/FTE	62.40	65.40	74.90	85.50	95.20	83.30	88.90
<b>Large beamtrawlers</b>	<b>GVA</b>	<b>47.50</b>	<b>51.20</b>	<b>64.90</b>	<b>85.10</b>	<b>103.80</b>	<b>93.10</b>	<b>83.20</b>
TBB_VL2440	GVA	10.00	12.40	13.20	16.10	23.80	18.80	13.80
TBB_VL40XX	GVA	37.50	38.80	51.70	68.90	80.00	74.30	69.40

### Demersal trawlers

The demersal trawl fleet segments consists of 33 vessels in 2018, targeting various species such as nephrops, plaice and mullet (those three species make up for about 53% of the value of landings in 2018). The segment of 24-40 meter also include one vessel which is larger than 40 meter. The fleet showed a positive return of investment and a revenue over break-even revenue above one since 2012 on average although the smaller demersal trawlers show high inter-annual variability and two years with indicators "not in balance". These indicate an economically viable fleet despite heterogeneity in the segments. The average crew wage has

been above average wage<sup>1</sup> in the Netherlands in all years. The GVA of the demersal fleet is positive and contributes to 9% of the total GVA for Dutch fleets.

*Table 20: Economic and social indicators demersal fleet (in grey) and from the STECF segments in that cluster. ROI: Return on Investment in %, CR/BER: current revenue over break-even revenue, NPM: net profit margin in %, Crew Costs/FTE: crew costs per full time equivalent in thousand euro and GVA: gross value added in million euro*

Fleet	Indicators	2012	2013	2014	2015	2016	2017	2018
<b>Demersal trawlers</b>	<b>ROI</b>	<b>2.10</b>	<b>2.50</b>	<b>6.70</b>	<b>19.40</b>	<b>15.10</b>	<b>14.50</b>	<b>10.80</b>
DTS_VL1824	ROI	-4.20	4.30	15.20	30.70	18.30	-3.00	0.70
DTS_VL2440	ROI	3.90	1.60	4.60	17.30	14.80	17.60	12.00
<b>Demersal trawlers</b>	<b>CR/BER</b>	<b>1.17</b>	<b>1.22</b>	<b>1.32</b>	<b>2.18</b>	<b>1.72</b>	<b>1.59</b>	<b>1.41</b>
DTS_VL1824	CR/BER	0.90	1.28	1.40	2.00	1.31	0.96	1.05
DTS_VL2440	CR/BER	1.30	1.20	1.29	2.24	1.88	1.80	1.45
<b>Demersal trawlers</b>	<b>NPM</b>	<b>4.10</b>	<b>5.50</b>	<b>7.70</b>	<b>19.30</b>	<b>16.80</b>	<b>13.80</b>	<b>8.90</b>
DTS_VL1824	NPM	-2.90	6.60	9.30	17.20	9.50	-1.50	1.30
DTS_VL2440	NPM	6.60	5.00	7.20	19.90	18.80	16.40	9.60
<b>Demersal trawlers</b>	<b>Crew Costs/FTE</b>	<b>53.90</b>	<b>48.80</b>	<b>58.40</b>	<b>82.20</b>	<b>75.40</b>	<b>80.60</b>	<b>75.70</b>
DTS_VL1824	Crew Costs/FTE	42.30	43.30	50.60	73.00	57.30	80.60	82.60
DTS_VL2440	Crew Costs/FTE	59.80	51.40	61.70	85.90	82.50	80.60	75.10
<b>Demersal trawlers</b>	<b>GVA</b>	<b>13.80</b>	<b>10.90</b>	<b>14.70</b>	<b>24.30</b>	<b>25.00</b>	<b>23.10</b>	<b>19.90</b>
DTS_VL1824	GVA	3.30	3.30	3.80	5.70	4.80	2.70	1.70
DTS_VL2440	GVA	10.60	7.60	10.90	18.60	20.20	20.50	18.20

### Pelagic fleet

The pelagic fleet consisted of 7 vessels in 2018 targeting pelagic species on large trawlers. In 2018, the four main species (herring, blue whiting, mackerel and horse mackerel) amounted for 92% of the revenue of the fleet. It has sustained a calculated loss every year over the period until 2015 with negative gross profits. However, there is a tidy positive result with a positive Return On Investment (ROI) and revenue above the breakeven revenue since 2016. Because the pelagic fleet is vertically integrated in companies the calculated losses do not mean that the sector is unprofitable: the prices used to calculate revenue are internally applied transfer prices provided by the fishing companies as the fish is not sold in auction but transformed and traded directly by the companies. The crew wage is higher than the average Dutch salary<sup>1</sup> and the GVA is positive. In 2018, this GVA contributed to 24% of GVA for the total Dutch fleet.

*Table 21: Economic and social indicators pelagic fleet (in grey). ROI: Return on Investment in %, CR/BER: current revenue over break-even revenue, NPM: net profit margin in %, Crew Costs/FTE: crew costs per full time equivalent in thousand euro and GVA: gross value added in million euro*

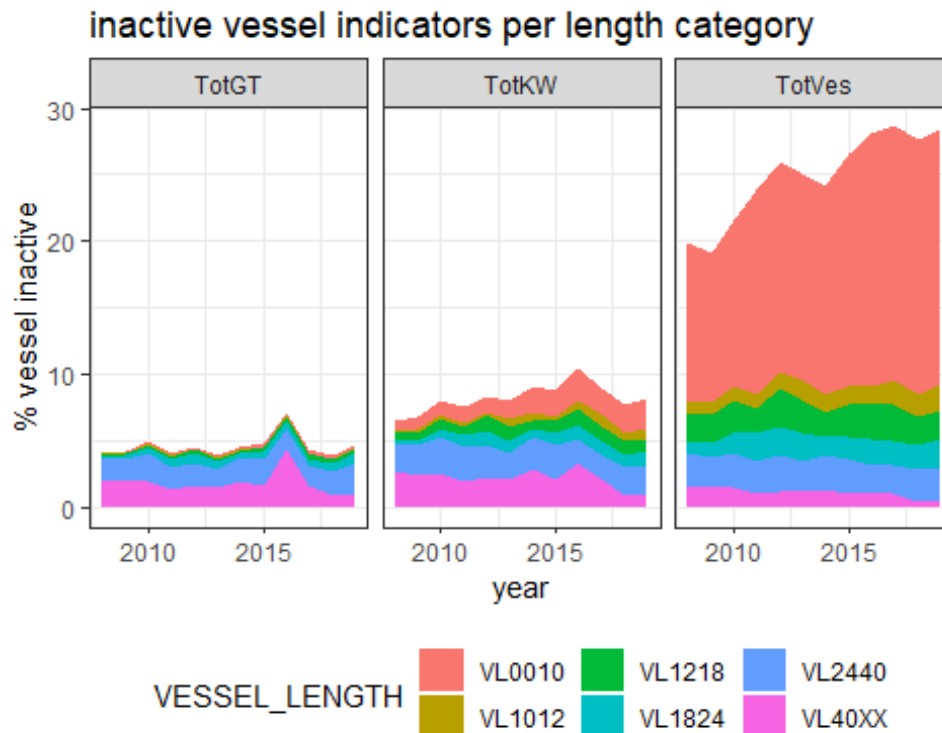
Fleet	Indicators	2012	2013	2014	2015	2016	2017	2018
<b>Pelagic trawlers</b>	<b>ROI</b>	<b>-16.00</b>	<b>-21.30</b>	<b>-9.20</b>	<b>-13.20</b>	<b>5.50</b>	<b>7.20</b>	<b>2.10</b>
TM_VL40XX	ROI	-16.00	-21.30	-9.20	-13.20	5.50	7.20	2.10
<b>Pelagic trawlers</b>	<b>CR/BER</b>	<b>0.11</b>	<b>0.36</b>	<b>0.73</b>	<b>0.28</b>	<b>1.24</b>	<b>1.39</b>	<b>1.15</b>
TM_VL40XX	CR/BER	0.11	0.36	0.73	0.28	1.24	1.39	1.15
<b>Pelagic trawlers</b>	<b>NPM</b>	<b>-23.40</b>	<b>-25.80</b>	<b>-6.90</b>	<b>-20.60</b>	<b>7.00</b>	<b>9.20</b>	<b>3.20</b>

Fleet	Indicators	2012	2013	2014	2015	2016	2017	2018
TM_VL40XX	NPM	-23.40	-25.80	-6.90	-20.60	7.00	9.20	3.20
<b>Pelagic trawlers</b>	<b>Crew Costs/FTE</b>	<b>66.30</b>	<b>68.60</b>	<b>84.30</b>	<b>89.40</b>	<b>81.80</b>	<b>84.60</b>	<b>97.30</b>
TM_VL40XX	Crew Costs/FTE	66.30	68.60	84.30	89.40	81.80	84.60	97.30
<b>Pelagic trawlers</b>	<b>GVA</b>	<b>28.00</b>	<b>38.50</b>	<b>49.20</b>	<b>27.00</b>	<b>54.60</b>	<b>57.30</b>	<b>52.90</b>
TM_VL40XX	GVA	28.00	38.50	49.20	27.00	54.60	57.30	52.90

## Technical indicators

### Inactive vessel indicator

Following the method used by STECF, the inactive vessel indicator is calculated for all vessel length categories as the ratio inactive over the total fleet. Three indicators of capacity utilization are calculated, using the number of vessels (TotVes), the engine power (TotkW) and the gross tonnage (TotGT). While the inactivity of the Dutch fleet lays below 10% in terms of gross tonnage and engine power, the large number of small inactive vessels brings the total inactive vessel percentage above the 20% threshold. This is mainly due to the relatively large amount to small inactive vessels (approx. 19% of the fleet total) which contribute less than 1% to the total tonnage of the fleet. The inactivity percentage of the categories <10m and 12-18m has been growing over time. The larger vessel categories' contribution to the inactivity percentage is small due to the low number of large vessels in the fishery (Table 1). Over the whole period the inactivity for the large vessels has remained relatively stable. The large inactive vessels are cockle vessels included in this category. These vessels are used in the hand cockle fisheries or other activities where no landing registrations are required (and in this way registered as inactive).





*Table 22: Percentage inactive per vessel length category in terms of vessel number, KW and tonnage.*

Indicator	Vessel length	2012	2013	2014	2015	2016	2017	2018	2019
TotGT	VL0010	0.15	0.15	0.18	0.22	0.23	0.21	0.22	0.24
	VL1012	0.07	0.08	0.08	0.08	0.08	0.11	0.11	0.12
	VL1218	0.32	0.23	0.18	0.31	0.34	0.35	0.29	0.32
	VL1824	0.65	0.60	0.39	0.60	0.62	0.53	0.57	0.74
	VL2440	1.79	1.33	1.74	1.91	1.51	1.56	1.84	2.43
	VL40XX	1.65	1.58	2.04	1.73	4.43	1.63	0.91	0.95
TotKW	VL0010	1.19	1.44	2.01	1.96	2.41	2.07	2.07	2.23
	VL1012	0.25	0.65	0.47	0.29	0.52	0.83	0.65	0.75
	VL1218	1.16	0.95	0.66	0.93	1.21	1.15	0.97	1.00
	VL1824	1.07	1.03	0.68	0.93	1.04	0.98	0.98	1.19
	VL2440	2.49	1.85	2.42	2.53	1.84	1.87	2.07	2.09
	VL40XX	2.24	2.21	2.87	2.22	3.41	2.12	0.97	0.98
TotVes	VL0010	15.68	15.37	15.72	17.57	18.96	19.16	19.00	19.20
	VL1012	1.35	1.63	1.39	1.26	1.36	1.77	1.66	1.93
	VL1218	2.84	2.31	1.81	2.51	2.59	2.72	2.22	2.07
	VL1824	2.16	2.18	1.25	1.67	1.91	1.77	1.80	2.35
	VL2440	2.70	2.31	2.64	2.51	2.05	2.17	2.36	2.35
	VL40XX	1.22	1.22	1.39	1.12	1.23	1.09	0.55	0.55

### Vessel Utilization Ratio

Looking at the utilisation of the active fleet in terms of fishing effort:

- the small scale vessels are largely underutilised, below 20% of the days at sea over the maximum observed effort (max observed days in based on average days at sea of 10 most active vessels). Which comes from very heterogeneous levels of effort in the fishery (note that days at sea are real 24h days so for small scale fleets with day trips 3 x 8 hours trip would make a day). The maximum number of days at sea observed has also sharply declined in 2018.
- The smaller beam trawlers also have very heterogeneous levels of activity in the fleet and are utilised at around 60% of the KW-days. This is mainly due to the seasonality of the shrimping activity and the limitation of the effort due to market regulation.
- The large beam trawls are utilized at around 70% for all years. The slight decrease in utilisation in the most recent years is due to the increasing trend in the maximum number of days at sea observed for this fleet. From 222 in 2008 up to 309 days in 2018, the most active vessels are now fishing continuously and are longer at sea than the pelagic trawlers.
- The utilisation for the segments using demersal trawls remains around 70%.
- The utilisation of pelagic fleet has increased over the last years. In 2018 7 pelagic vessels were fishing under Dutch flag utilising 105% of the KW-days and GT-days.

*Table 23: Vessel utilization ratio as a proportion of seadays, gtdays and kWdays over maximum observed sea days.*

Indicator	Fleet	2012	2013	2014	2015	2016	2017	2018
observeddays	Small scale and coastal	0.24	0.18	0.17	0.18	0.15	0.16	<b>0.18</b>
	DFN_VL1218	0.84	0.78	0.79	1.00	1.00	-	-
	DFN_VL1824	0.78	1.12	1.00	1.14	1.29	0.79	<b>0.62</b>



Indicator	Fleet	2012	2013	2014	2015	2016	2017	2018
	DRB_VL2440	0.81	0.65	0.52	1.06	0.57	-	-
	DTS_VL0010	0.76	0.70	0.78	1.02	0.84	-	-
	PG_VL0010	0.19	0.17	0.15	0.16	0.15	0.17	<b>0.17</b>
	PG_VL1012	0.72	0.86	0.66	0.67	0.60	0.63	<b>0.62</b>
	TBB_VL0010	0.61	0.63	0.59	0.69	0.83	0.41	<b>0.59</b>
	Small beamtrawlers	0.62	0.60	0.61	0.62	0.63	0.59	<b>0.58</b>
	TBB_VL1218	0.60	0.77	0.62	0.65	0.59	0.57	<b>0.54</b>
	TBB_VL1824	0.67	0.64	0.65	0.66	0.68	0.63	<b>0.62</b>
	Large beamtrawlers	0.79	0.75	0.76	0.76	0.73	0.70	<b>0.65</b>
	TBB_VL2440	0.84	0.81	0.82	0.85	0.84	0.82	0.79
	TBB_VL40XX	0.84	0.81	0.81	0.80	0.77	0.74	0.71
	Demersal trawlers	0.78	0.90	0.89	0.84	0.78	0.83	0.83
	DTS_VL1824	0.94	1.00	1.02	0.93	1.00	1.12	1.00
	DTS_VL2440	0.80	0.91	0.89	0.85	0.78	0.83	0.84
	Pelagic trawlers	0.98	0.80	1.00	1.14	1.00	1.00	1.14
TM_VL40XX	0.98	0.80	1.00	1.14	1.00	1.00	1.14	
observedgt	Small scale and coastal	1.41	1.13	0.86	1.17	0.65	0.47	0.73
	DFN_VL1218	1.01	0.94	0.97	0.95	0.90	-	-
	DFN_VL1824	0.96	1.20	0.93	1.14	1.36	0.75	<b>0.60</b>
	DRB_VL2440	0.89	0.67	0.61	0.96	0.57	-	-
	DTS_VL0010	1.12	1.34	1.29	1.12	1.15	-	-
	PG_VL0010	0.19	0.17	0.13	0.14	0.14	0.16	<b>0.16</b>
	PG_VL1012	0.59	0.81	0.58	0.58	0.52	0.62	<b>0.56</b>
	TBB_VL0010	0.22	0.42	0.43	0.39	0.53	0.50	<b>0.56</b>
	Small beamtrawlers	0.68	0.64	0.65	0.65	0.67	0.70	0.70
	TBB_VL1218	0.69	0.81	0.67	0.67	0.61	0.77	0.81
	TBB_VL1824	0.67	0.63	0.64	0.64	0.66	0.62	<b>0.61</b>
	Large beamtrawlers	0.85	0.85	0.83	0.81	0.79	0.75	0.71
	TBB_VL2440	0.79	0.75	0.74	0.82	0.78	0.79	0.77
	TBB_VL40XX	0.71	0.69	0.69	0.68	0.66	0.63	<b>0.61</b>
	Demersal trawlers	0.91	1.02	0.99	0.96	0.81	0.81	0.80
DTS_VL1824	0.89	0.92	0.92	0.77	0.90	0.99	0.89	
DTS_VL2440	0.71	0.81	0.79	0.75	0.68	0.71	0.74	
Pelagic trawlers	0.76	0.75	0.87	0.93	0.78	0.80	1.05	
TM_VL40XX	0.76	0.75	0.87	0.93	0.78	0.80	1.05	
observedkw	Small scale and coastal	0.51	0.51	0.35	0.36	0.40	0.19	<b>0.25</b>
	DFN_VL1218	0.75	0.66	0.59	0.63	0.96	-	-
	DFN_VL1824	0.76	1.04	0.81	0.95	1.10	0.64	<b>0.51</b>
	DRB_VL2440	0.91	0.68	0.64	1.07	0.52	-	-
	DTS_VL0010	1.22	1.51	1.17	1.08	0.74	-	-
	PG_VL0010	0.20	0.18	0.14	0.14	0.14	0.14	<b>0.18</b>
	PG_VL1012	0.41	0.62	0.41	0.40	0.41	0.44	<b>0.42</b>
	TBB_VL0010	0.56	0.81	0.71	0.67	1.11	0.66	0.71
	Small beamtrawlers	0.64	0.60	0.62	0.62	0.64	0.64	<b>0.64</b>
	TBB_VL1218	0.70	0.83	0.64	0.63	0.59	0.70	<b>0.67</b>
	TBB_VL1824	0.62	0.58	0.60	0.60	0.62	0.57	<b>0.56</b>
	Large beamtrawlers	0.87	0.87	0.85	0.83	0.81	0.77	0.73

Indicator	Fleet	2012	2013	2014	2015	2016	2017	2018
	TBB_VL2440	0.78	0.75	0.72	0.83	0.80	0.79	0.77
	TBB_VL40XX	0.71	0.69	0.69	0.67	0.66	0.63	<b>0.60</b>
	Demersal trawlers	0.84	0.96	0.95	0.91	0.79	0.79	0.78
	DTS_VL1824	0.84	0.89	0.91	0.73	0.88	0.99	0.89
	DTS_VL2440	0.68	0.80	0.78	0.73	0.67	0.69	0.72
	Pelagic trawlers	0.76	0.73	0.87	0.94	0.78	0.80	1.06
	TM_VL40XX	0.76	0.73	0.87	0.94	0.78	0.80	1.06

*Table 24: Maximum observed sea days per fleet.*

Indicator	Fleet	2012	2013	2014	2015	2016	2017	2018
	Small scale and coastal	80	106	108	101	143	115	78
	DFN_VL1218	58	53	45	22	14	-	-
	DFN_VL1824	43	67	28	35	26	27	32
	DRB_VL2440	76	106	108	61	143	-	-
	DTS_VL0010	2	5	7	1	7	-	-
	PG_VL0010	80	84	107	101	133	115	78
	PG_VL1012	36	27	30	35	41	34	25
	TBB_VL0010	22	16	19	22	16	24	13
	Small beamtrawlers	208	219	198	203	217	210	204
MAX_DAYS	TBB_VL1218	73	65	84	85	89	119	115
	TBB_VL1824	208	219	198	203	217	210	204
	Large beamtrawlers	246	253	242	252	269	286	309
	TBB_VL2440	204	204	199	201	211	211	205
	TBB_VL40XX	246	253	242	252	269	286	309
	Demersal trawlers	232	208	214	206	225	213	223
	DTS_VL1824	185	179	189	180	174	156	165
	DTS_VL2440	232	208	214	206	225	213	223
	Pelagic trawlers	218	199	221	223	261	257	236
	TM_VL40XX	218	199	221	223	261	257	236

## References

Beukhof, E., and K. G. Hamon. 2020. "Indicators of the Balance Between Fleet Capacity and Fishing Opportunities: Discrepancies Between the Dutch National Fleet Report and Stecf." IJmuiden: Wageningen Marine Research. <https://doi.org/10.18174/521470>.