

# Economic performance of the EU fishing fleet

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## **1) EU fleet economic data collection**

- Timescales
- Data call
- Evaluation
- Analysis

## **2) 2011 EU fleet economic performance (AER) results**

- Employment and wages
- Landings
- Prices
- Income and expenditure
- Economic performance
- Subsidies

## **3) Summary**

### **Variable groups:**

Capacity, fishing enterprises (DCF only), employment, effort, landings, incomes, expenditures, capital and investments, recreational catches (DCF only)

### **Years:**

2002-2007 (DCR all), 2008-2009 (DCF economic), 2008-2010/11 (DCF transversal)

### **Aggregation levels:**

DCR all: 1) fleet segment, 2) national totals

DCF economic: 1) fleet segment / supra region, 2) national totals

DCF transversal: 1) fleet segment / FAO sub region 3/4, 2) national totals

### **Changes from last years call:**

National totals, effort aggregation levels, price data, recreational catches, clustering guidelines, years requested

VARIABLE GROUPING	BEL	BGR	CYP	DEU	DNK	ESP	EST	FIN	FRA	GBR	GRC	IRL	ITA	LTU	LVA	MLT	NLD	POL	PRT	ROU	SVN	SWE
CAPACITY	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
CAPACITY_TOT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
CAPVALINVEST	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
CAPVALINVEST_TOT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
EFFORT_FAO_LEVEL3_4	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
EFFORT_FS_SUPRA	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
EFFORT_TOT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
EMPLOYMENT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
EMPLOYMENT_TOT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
EXPENDITURE	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
EXPENDITURE_TOT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
FISHENT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
FISHENT_TOT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
INCOME	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
INCOME_TOT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
LANDINGS_FAO_LEVEL3_4	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
LANDINGS_FAO_TOT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
REC_CATCH	Red	Red	Green	Green	Green	Green	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
CAPACITY_DCR	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
CAPACITY_DCR_TOT	Green	Green	Red	Green	Red	Red	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
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EMPLOYMENT_DCR	Green	Red	Green	Green	Green	Green	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
EMPLOYMENT_DCR_TOT	Green	Red	Green	Green	Green	Green	Green	Green	Green	Red	Red	Green	Green	Green	Green	Red	Green	Green	Red	Red	Green	Green
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Country	DCR (2002-2007)	DCF (2008-2011)	Country	DCR (2002-2007)	DCF (2008-2011)
Belgium		<ul style="list-style-type: none"> <li>Recreational catch data not submitted</li> </ul>	Ireland	<ul style="list-style-type: none"> <li>Landings value data significantly lower than Eurostat data in some years</li> </ul>	<ul style="list-style-type: none"> <li>Landings value data significantly lower than Eurostat data</li> </ul>
Bulgaria	<ul style="list-style-type: none"> <li>Employment, Financial position, Revenues, costs and fuel consumption datasets not submitted</li> </ul>	<ul style="list-style-type: none"> <li>Recreational catch data not submitted</li> </ul>		<ul style="list-style-type: none"> <li>FTEs and fuel consumption not submitted</li> </ul>	<ul style="list-style-type: none"> <li>Employment, income, expenditures, capital values not submitted for certain fleet segments</li> </ul>
Cyprus	<ul style="list-style-type: none"> <li>Number of vessels data submitted significantly lower than Eurostat statistics</li> </ul>	<ul style="list-style-type: none"> <li>No 2010 transversal data submitted</li> </ul>		<ul style="list-style-type: none"> <li>Time series for number of vessels in national fleet is questionable</li> </ul>	<ul style="list-style-type: none"> <li>No 2010 effort or landings data submitted</li> </ul>
Germany		<ul style="list-style-type: none"> <li>Not a real national picture – around half total volume of landings are missing due to confidentiality issues</li> </ul>	Latvia	<ul style="list-style-type: none"> <li>Capital costs data not submitted</li> </ul>	<ul style="list-style-type: none"> <li>Capital values and capital costs data not submitted for certain segments in 2008</li> </ul>
Denmark	<ul style="list-style-type: none"> <li>Landings and effort data submitted using incorrect area codes and aggregation levels</li> <li>Number of vessels submitted significantly lower than Eurostat statistics</li> <li>Landings volumes and values submitted for 2005 significantly lower than Eurostat data</li> </ul>	<ul style="list-style-type: none"> <li>Landings volumes and values submitted significantly lower than Eurostat data</li> </ul>		<ul style="list-style-type: none"> <li>Tonnage and kilowatts data significantly lower than Eurostat statistics</li> </ul>	<ul style="list-style-type: none"> <li>Tonnage and kilowatts data significantly lower than Eurostat statistics</li> </ul>
Spain	<ul style="list-style-type: none"> <li>Value of landings not submitted.</li> </ul>	<ul style="list-style-type: none"> <li>Volume and value of landings at FAO area level 3 and national totals not submitted</li> </ul>	Malta	<ul style="list-style-type: none"> <li>Fleet tonnage data significantly lower than Eurostat statistics</li> </ul>	<ul style="list-style-type: none"> <li>Fleet tonnage data significantly lower than Eurostat statistics</li> </ul>
	<ul style="list-style-type: none"> <li>Data on landings volumes likely to be only 1/3rd of total</li> </ul>	<ul style="list-style-type: none"> <li>No data on fuel consumption</li> </ul>		<ul style="list-style-type: none"> <li>Missing data for certain segments</li> </ul>	<ul style="list-style-type: none"> <li>Missing data for certain segments</li> </ul>
	<ul style="list-style-type: none"> <li>No data on fuel consumption</li> </ul>	<ul style="list-style-type: none"> <li>No 2010 effort data submitted</li> </ul>		Portugal	<ul style="list-style-type: none"> <li>Financial position datasets not submitted</li> </ul>
Estonia	<ul style="list-style-type: none"> <li>Effort data for National fleet not submitted, only partial data</li> </ul>	<ul style="list-style-type: none"> <li>Effort data for National fleet not submitted, only partial data</li> </ul>	<ul style="list-style-type: none"> <li>Number of vessels, Tonnage, kilowatts data submitted significantly lower than Eurostat statistics</li> </ul>		<ul style="list-style-type: none"> <li>Historical vessel value, unpaid labour values, in-year investments and financial position not submitted</li> </ul>
Finland	<ul style="list-style-type: none"> <li>FTEs, energy consumption, and borrowing data were not submitted</li> </ul>		<ul style="list-style-type: none"> <li>Fixed costs, borrowing, investment, FTEs and fuel consumption not submitted</li> </ul>		
France	<ul style="list-style-type: none"> <li>Number of vessels and kilowatts data submitted significantly lower than Eurostat statistics</li> </ul>	<ul style="list-style-type: none"> <li>No 2010 transversal data submitted</li> </ul>	Romania	<ul style="list-style-type: none"> <li>Financial position, capacity, employment, expenditure, income, effort, landings datasets not submitted for 2007</li> </ul>	<ul style="list-style-type: none"> <li>Capital values and investments data not submitted</li> </ul>
	<ul style="list-style-type: none"> <li>No data submitted on total employed</li> </ul>	<ul style="list-style-type: none"> <li>Financial position, number of trips, unpaid labour values, number and length of nets, number of fishing operations, number of traps, number of hooks, soaking time not submitted for relevant segments</li> </ul>	Sweden		<ul style="list-style-type: none"> <li>Issues with clustering scheme for 2009</li> </ul>
	<ul style="list-style-type: none"> <li>High levels of missing data for certain fleet segments</li> </ul>	<ul style="list-style-type: none"> <li>High levels of missing data for certain fleet segments</li> </ul>	Netherlands	<ul style="list-style-type: none"> <li>Landings volume data significantly lower than Eurostat data in 2006 and 2007</li> <li>Missing data for certain segments</li> </ul>	<ul style="list-style-type: none"> <li>Recreational catch data not submitted</li> <li>Missing data for certain segments</li> </ul>
United Kingdom	<ul style="list-style-type: none"> <li>High levels of missing data for certain fleet segments</li> </ul>	<ul style="list-style-type: none"> <li>Recreational catch data not submitted</li> <li>Number of fishing operations, number of traps, number of hooks, number and length of nets, and soaking time not submitted for relevant segments</li> </ul>	Italy	<ul style="list-style-type: none"> <li>FTE data missing for large number of segments</li> </ul>	<ul style="list-style-type: none"> <li>In-year investments, non-fishing income, unpaid labour values not submitted</li> <li>Missing parameters for certain segments</li> <li>No 2010 effort data submitted</li> </ul>
	Greece	<ul style="list-style-type: none"> <li>Financial position, capacity, employment, expenditure, income, effort, landings datasets not submitted for 2007</li> <li>High levels of missing data for certain fleet segments in 2003</li> </ul>		<ul style="list-style-type: none"> <li>Capacity, capital values and investment, incomes, expenditures, employment effort, landing, fishing enterprises not submitted for 2008, 2009 or 2010</li> </ul>	Lithuania

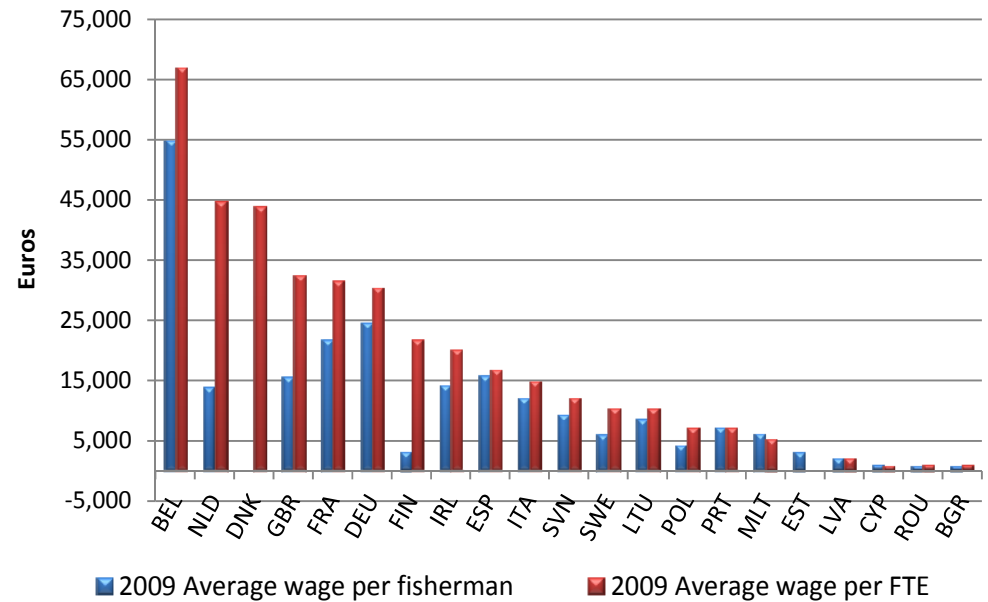
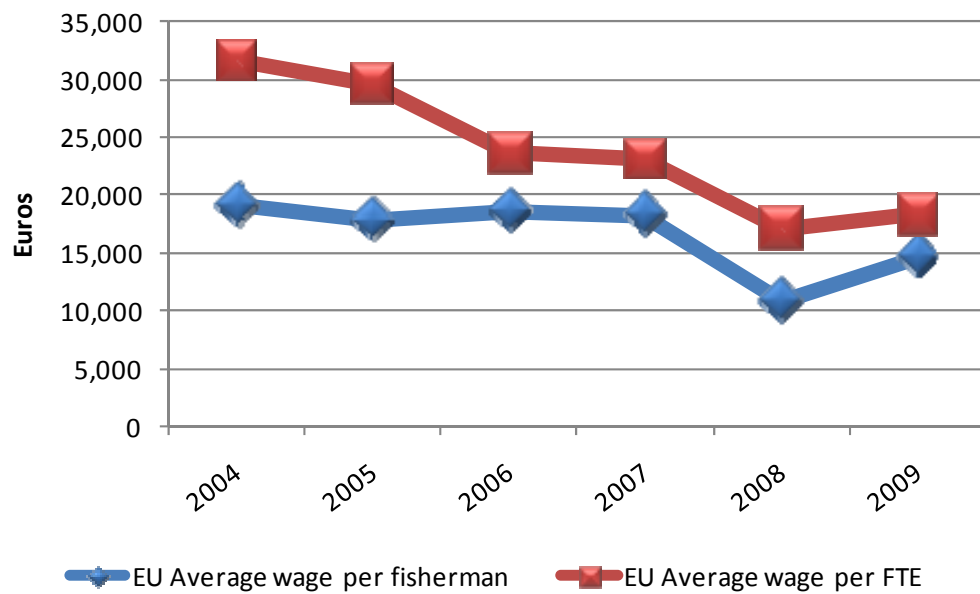
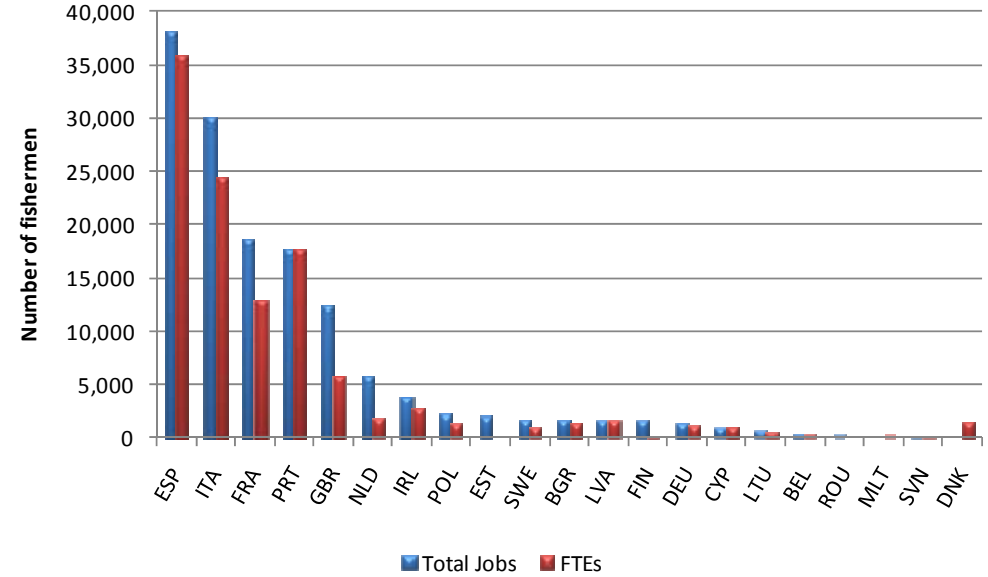
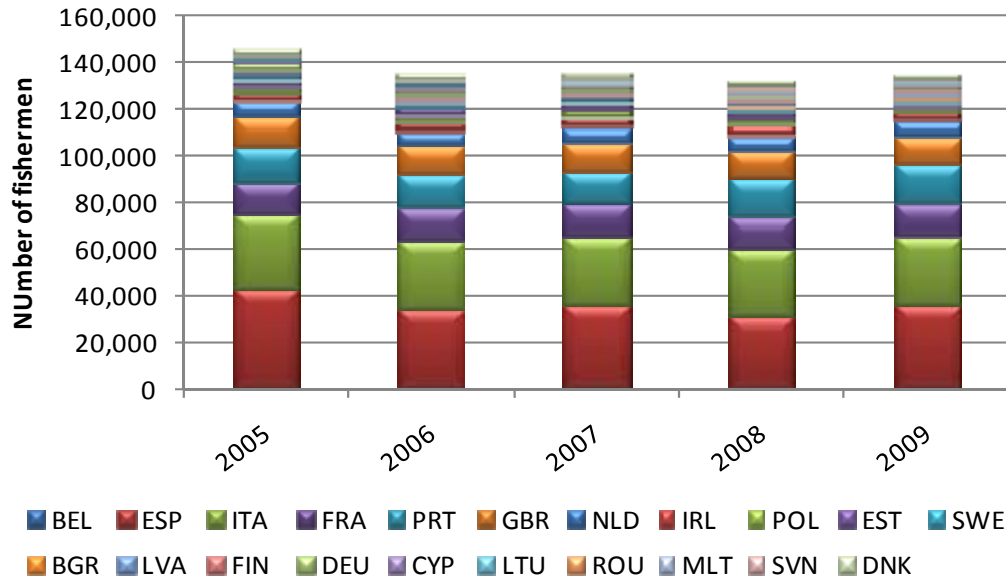
STECF expert working group 11-04 convened to produce 2011 AER

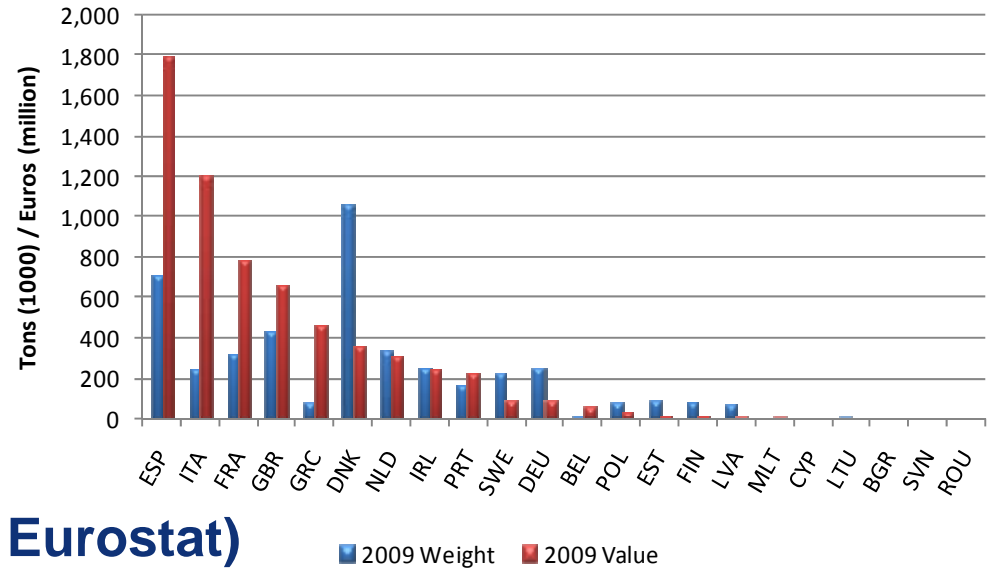
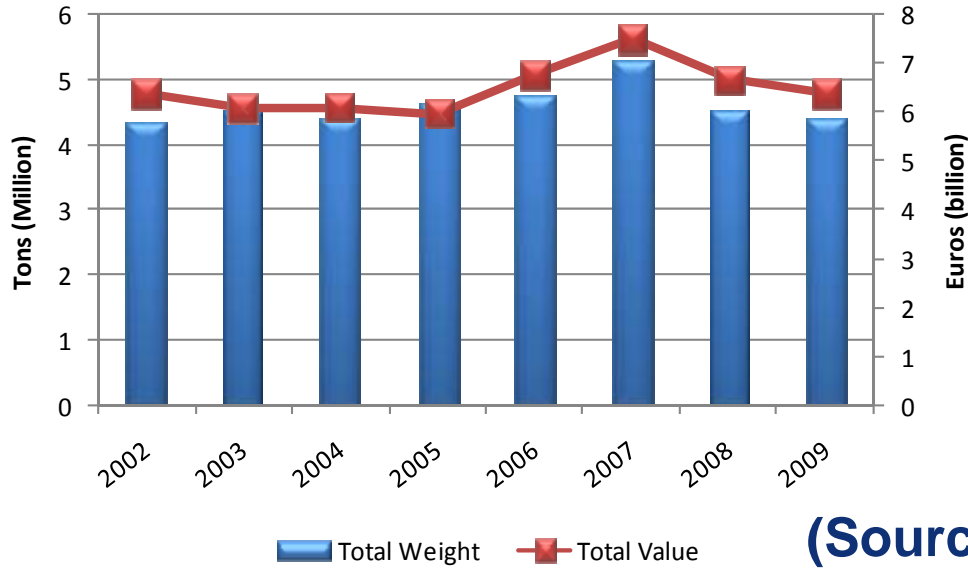
Meeting held 23<sup>rd</sup>-27<sup>th</sup> May 2011, JRC Ispra, Italy

17 economic experts from 14 EU Member States

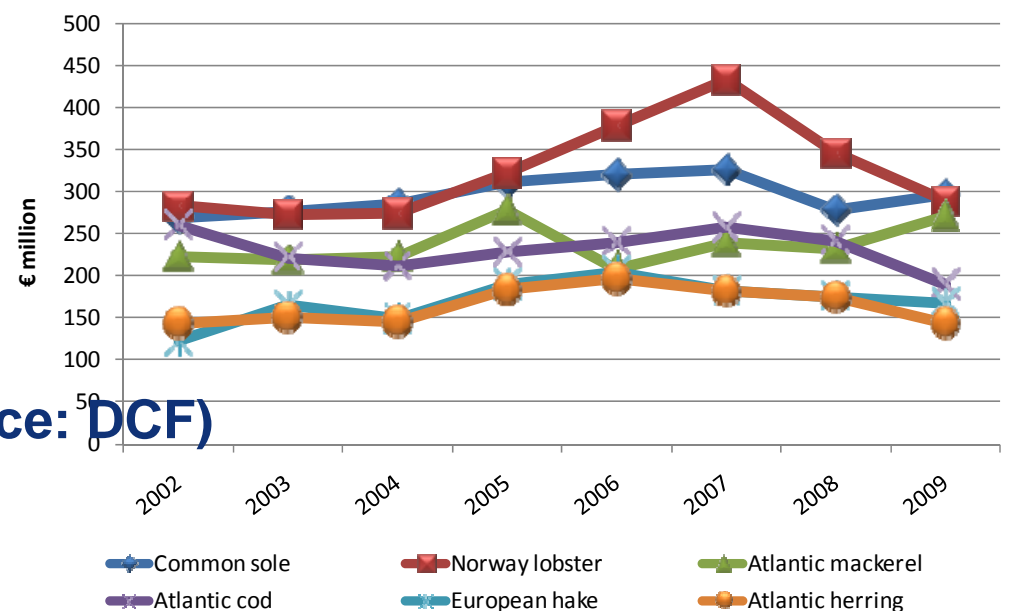
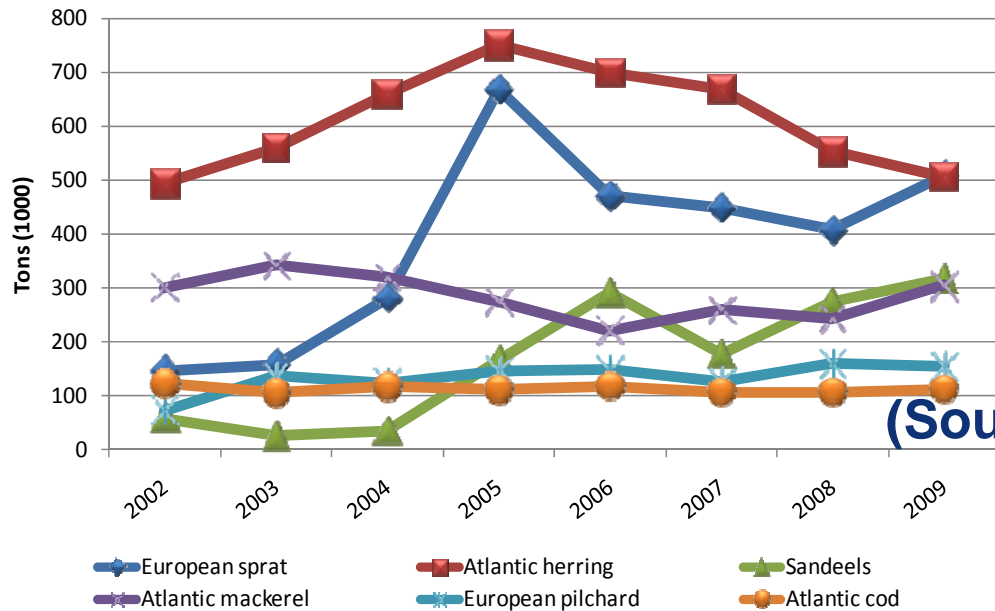
## **Terms of reference for 2011 AER on the fleet:**

- EU overview
- Regional Analysis
- National chapters
- Fish price analysis
- Specific topics for analysis:
  - *Analysis of the transactions and investments in fishing rights in the EU fleet.*
  - *Analysis of the subsidies in the EU Fleets and their importance for fleet profitability.*

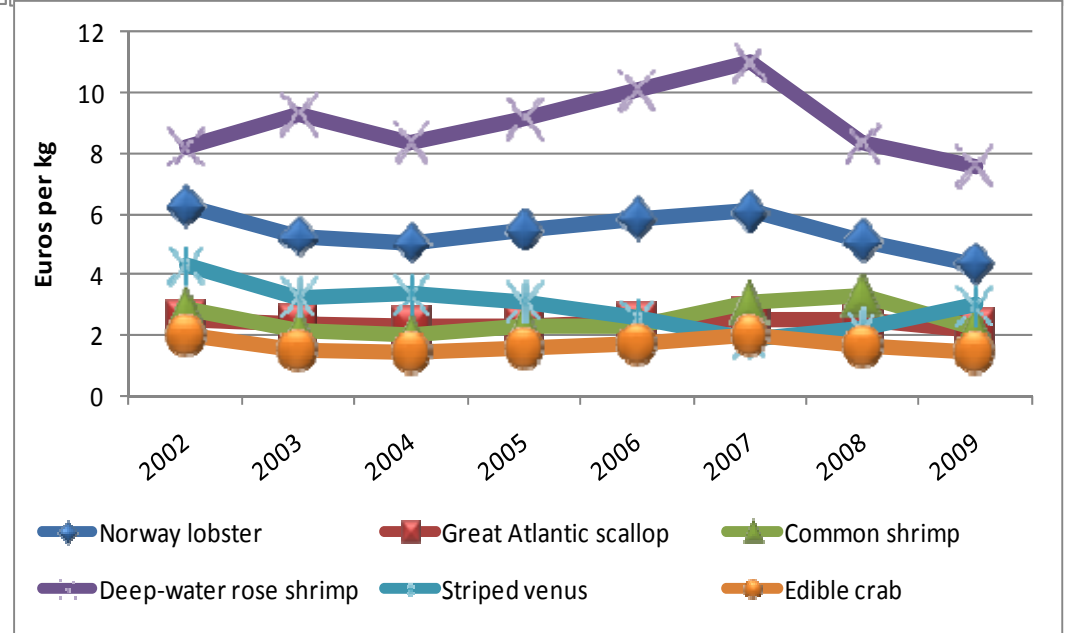
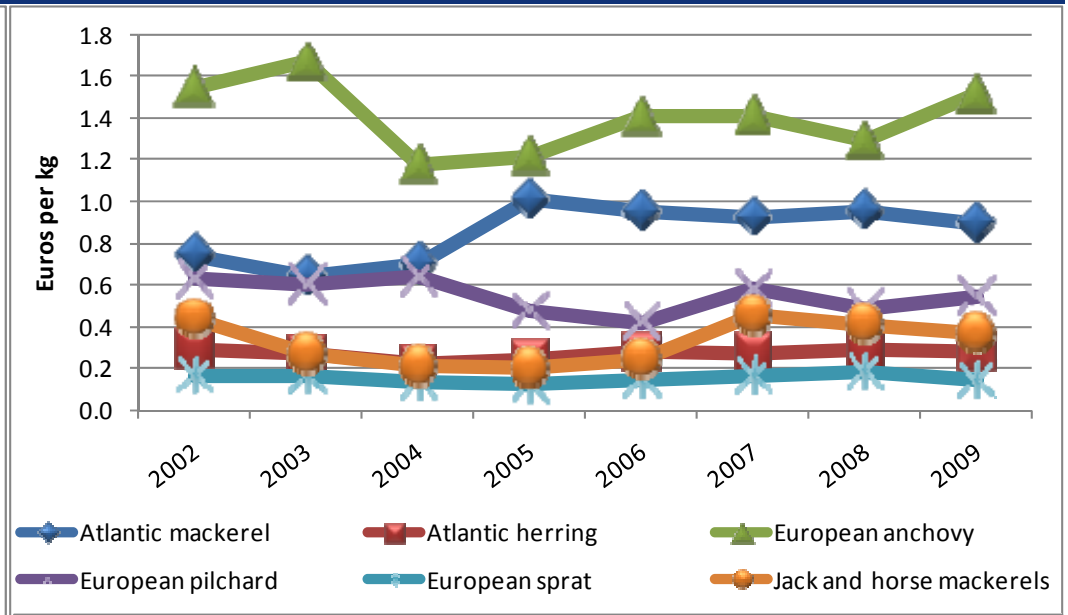
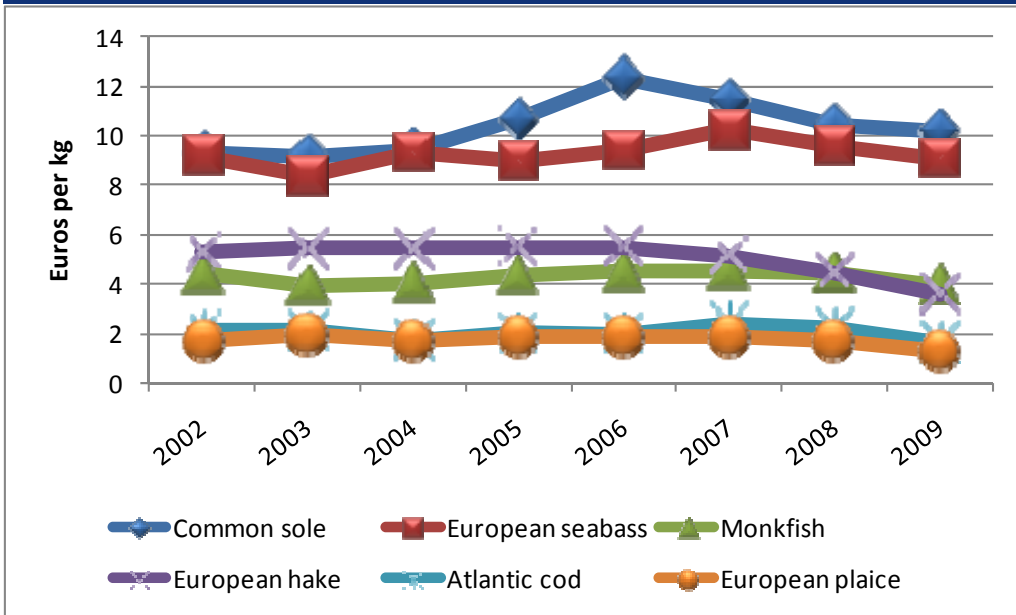




(Source: Eurostat)



(Source: DCF)



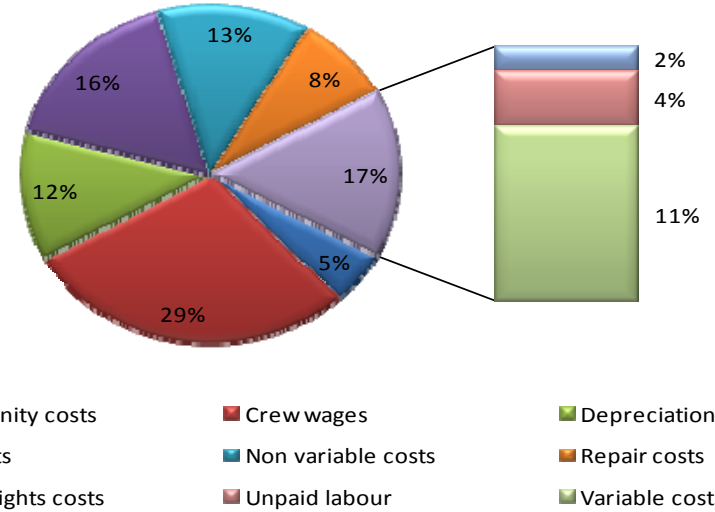
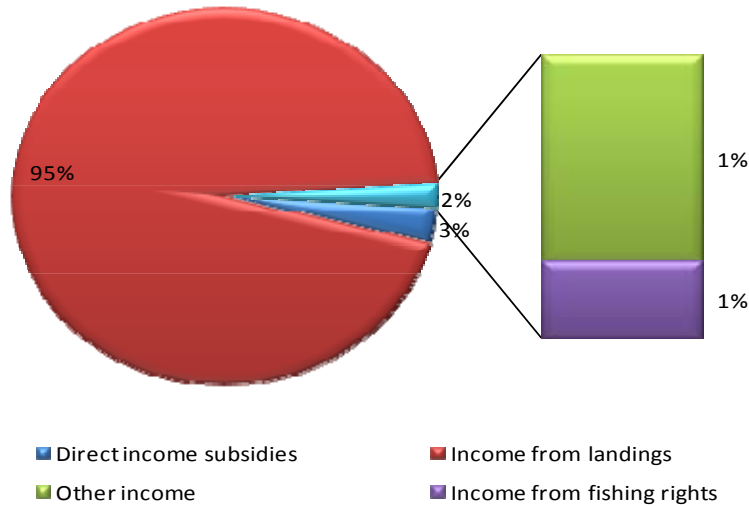
Top left: Demersal species

Top right: Pelagic species

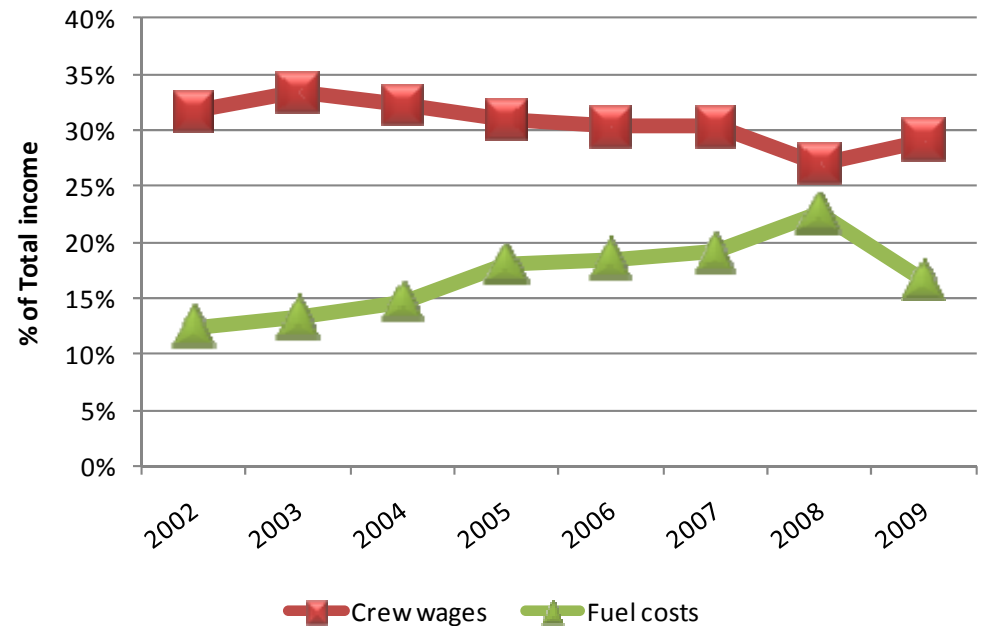
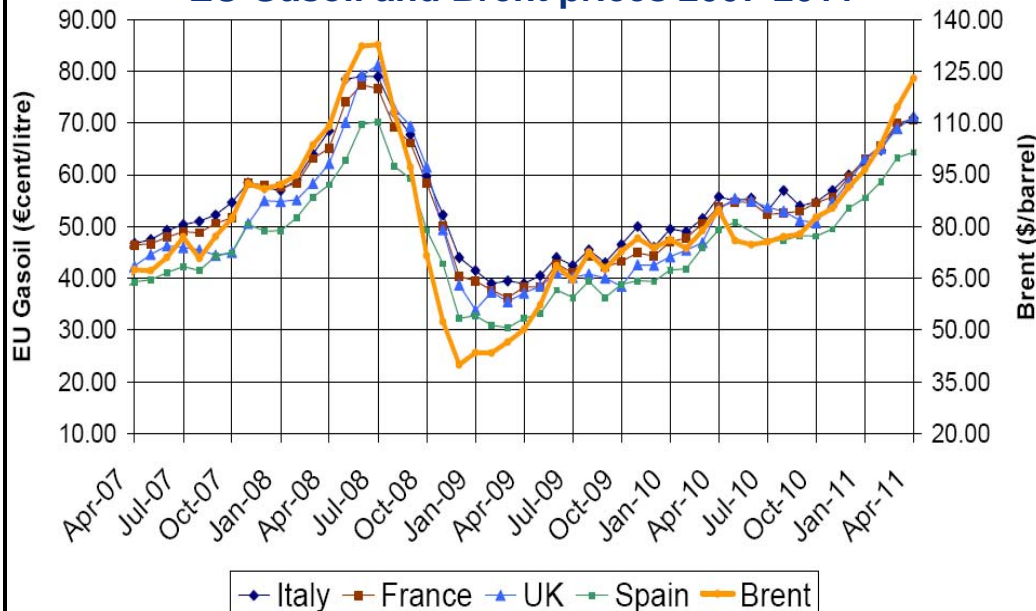
Bottom right: Shellfish species

Top 6 species in each category based on landed value in 2009

Spain and Greece excluded due to missing data



**EU Gasoil and Brent prices 2007-2011**

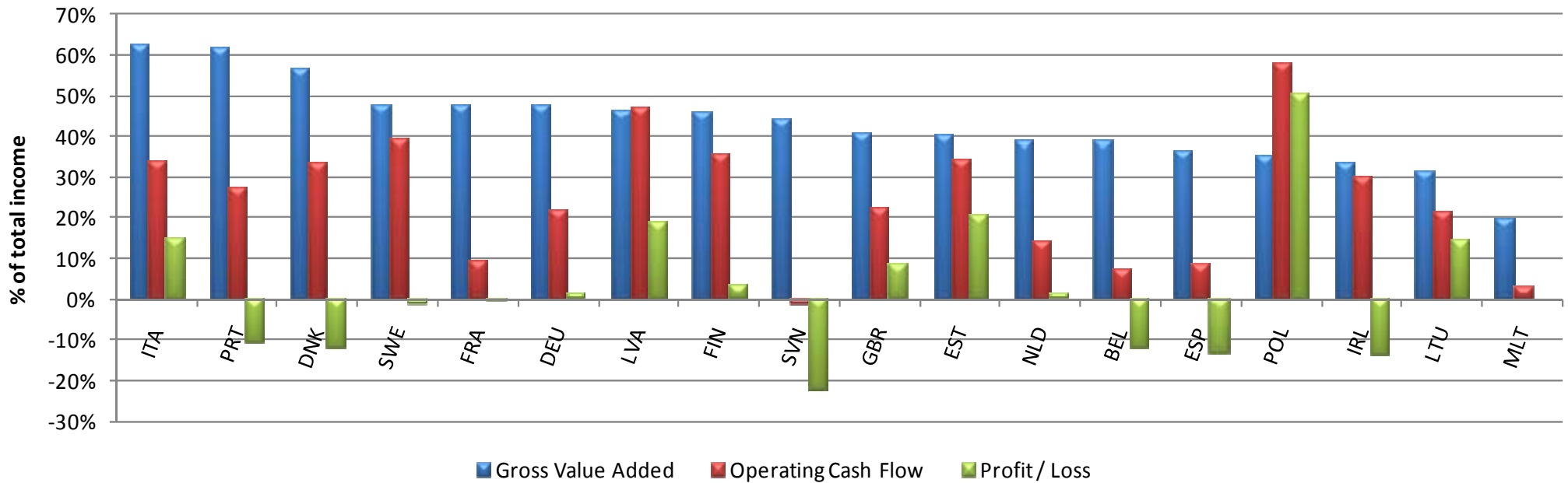
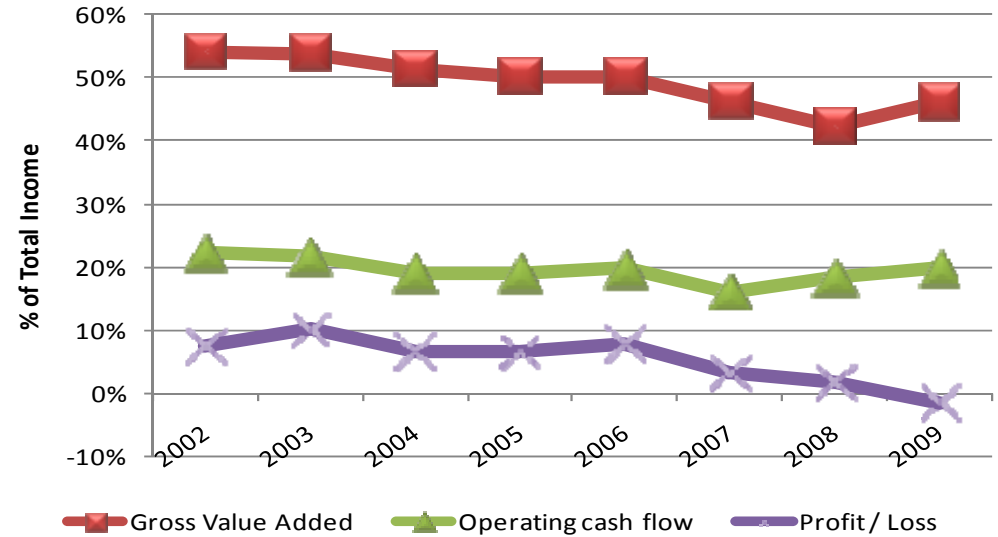
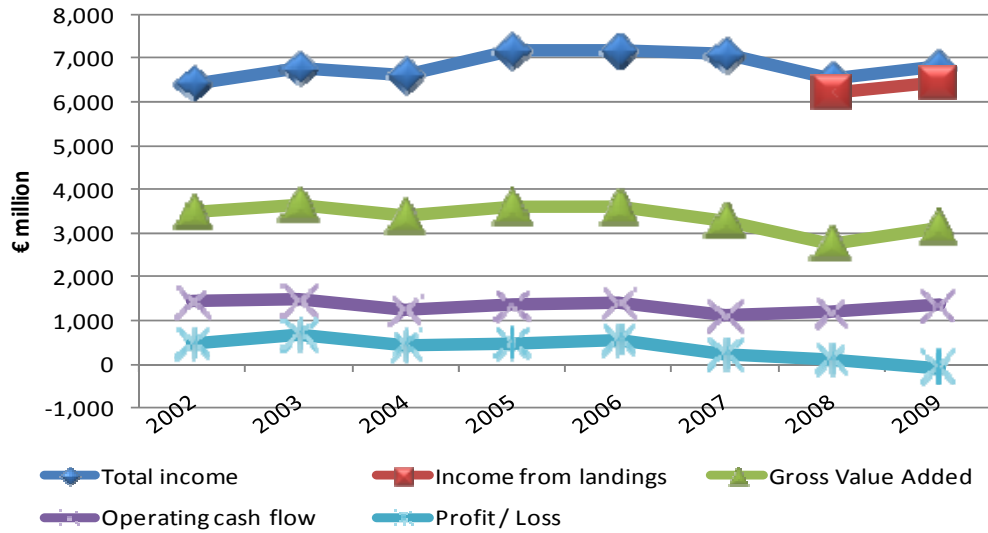


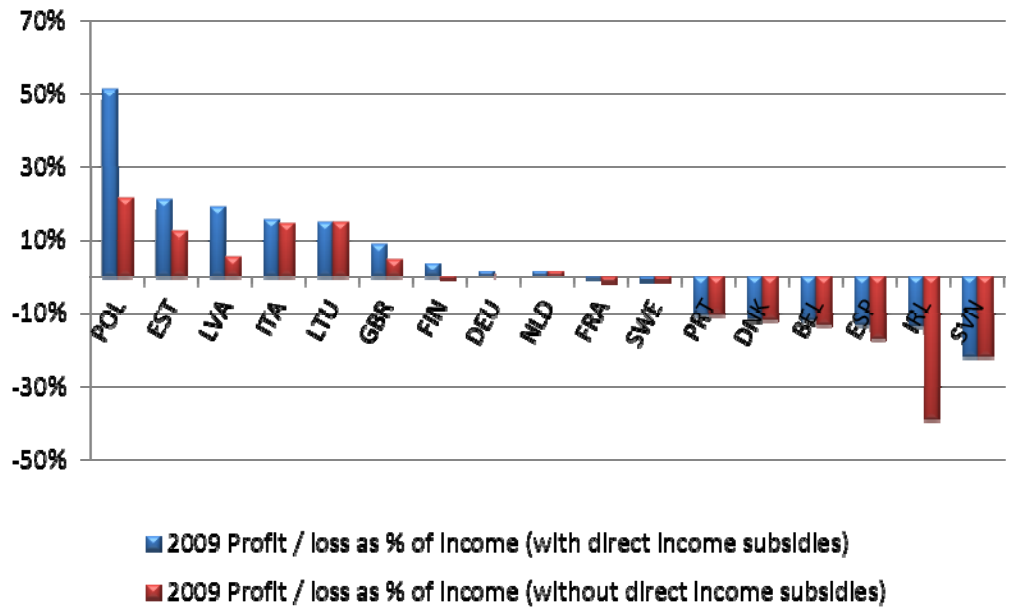
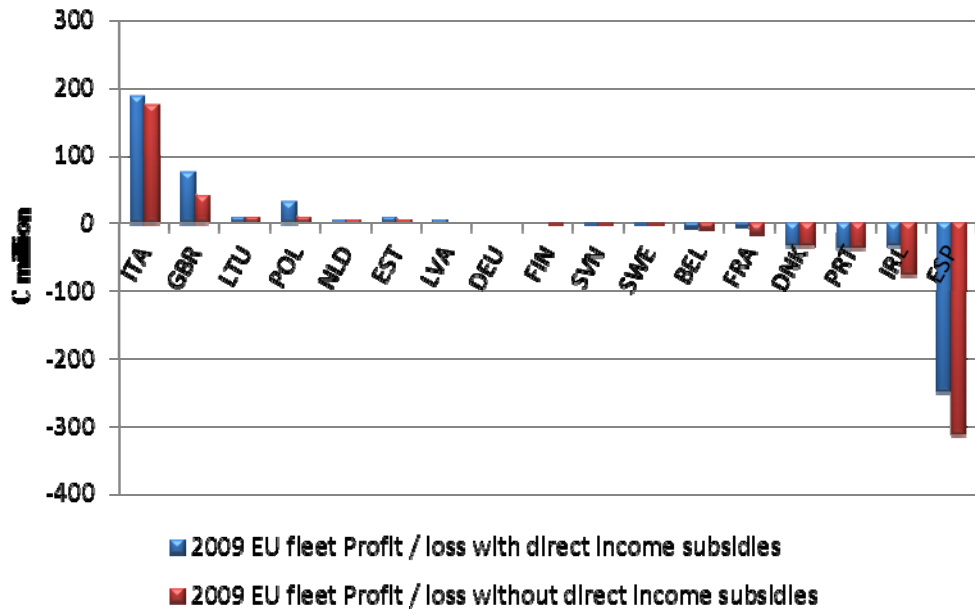
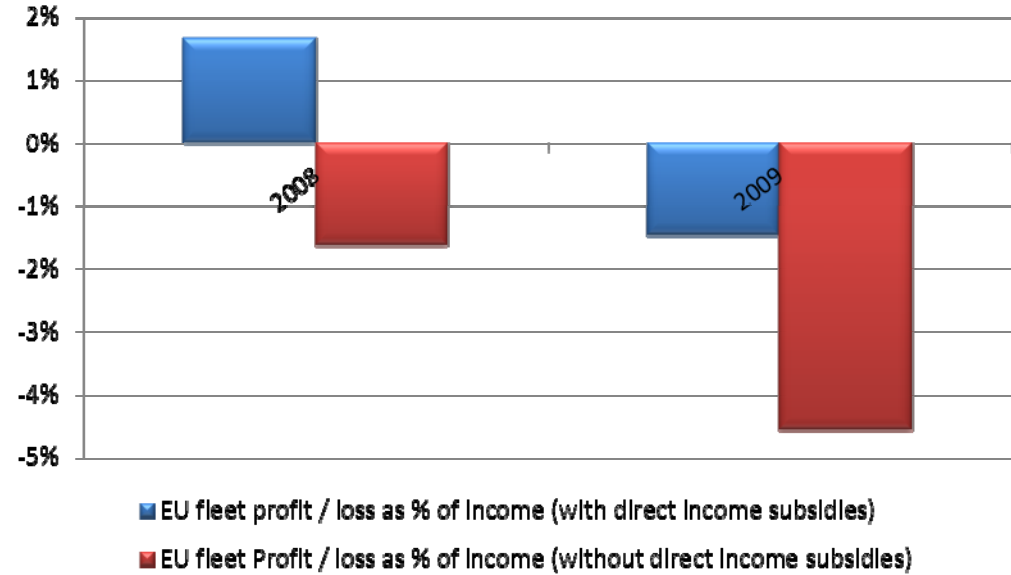
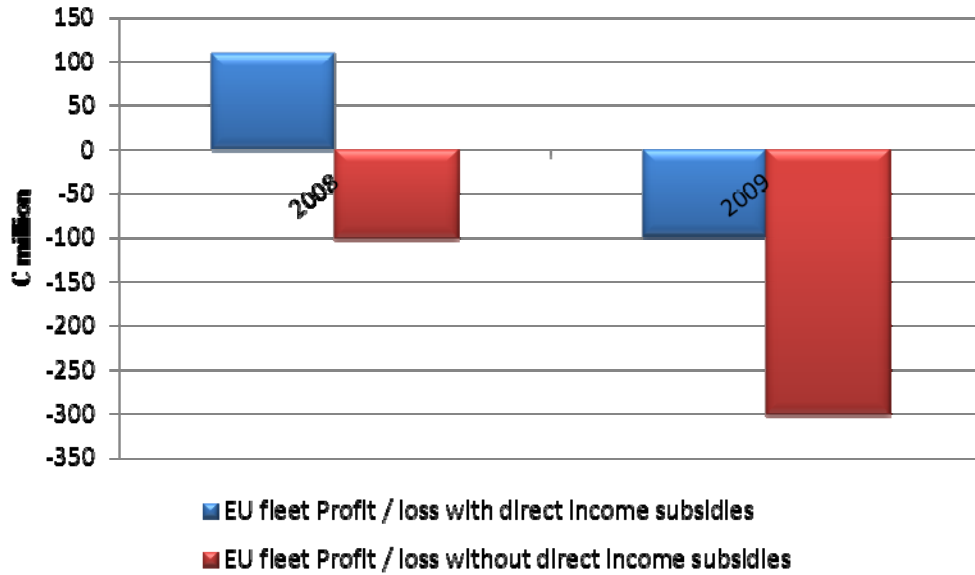
**Income** = Total income including value of landings, direct income subsidies, tourism etc

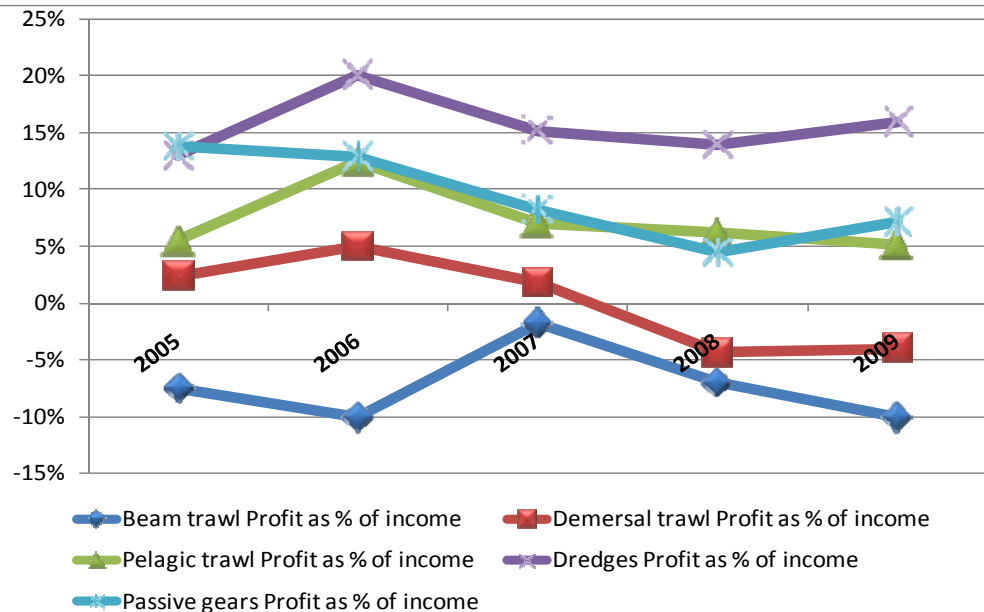
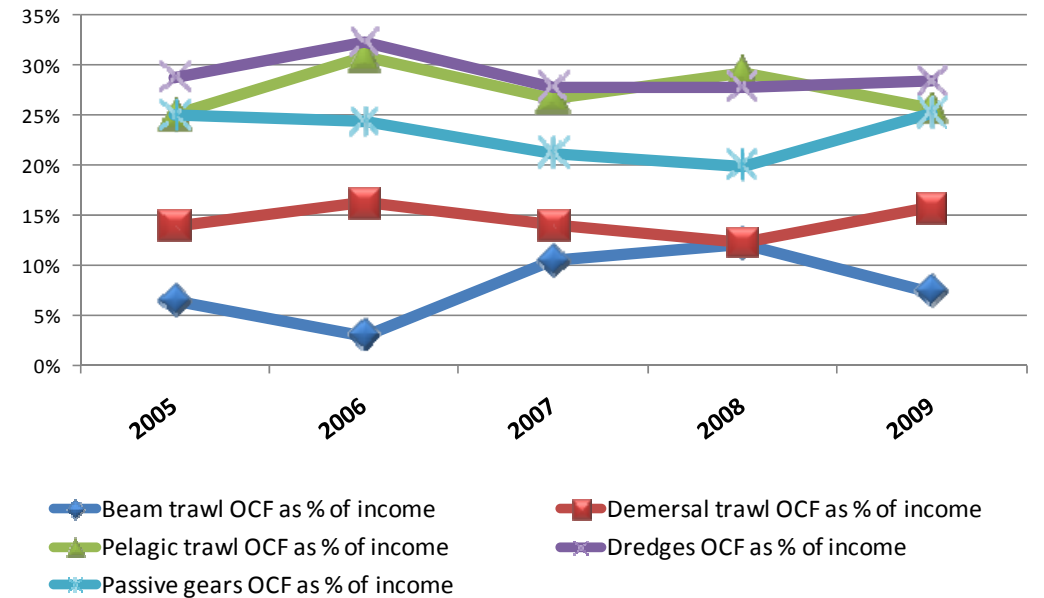
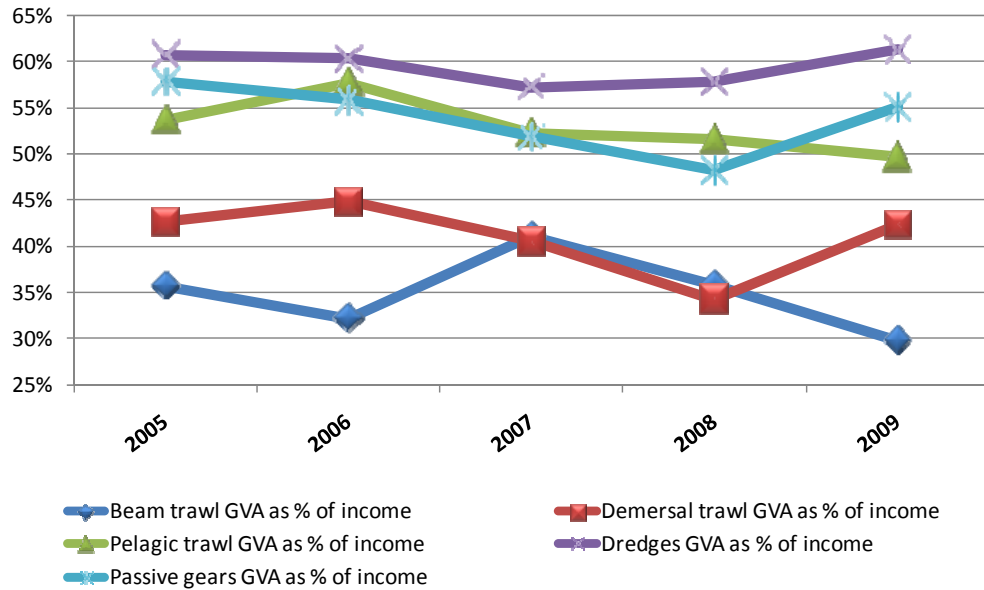
**Gross Value Added (GVA)** = Contribution to gross national product (GNP), sum of remuneration of crew and owner. Income minus all operating costs *except* crew costs

**Operating cash flow (OCF)** = Income minus all operational costs, *excludes* capital costs

**Profit or loss** = Income minus all costs, *includes* capital costs, where capital costs are depreciation and real interest

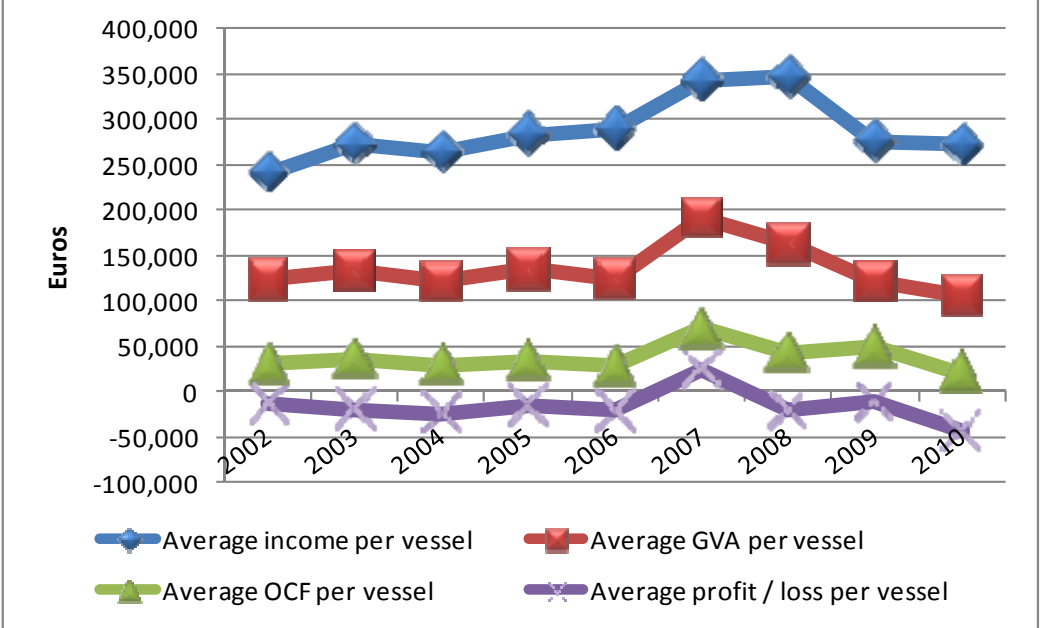
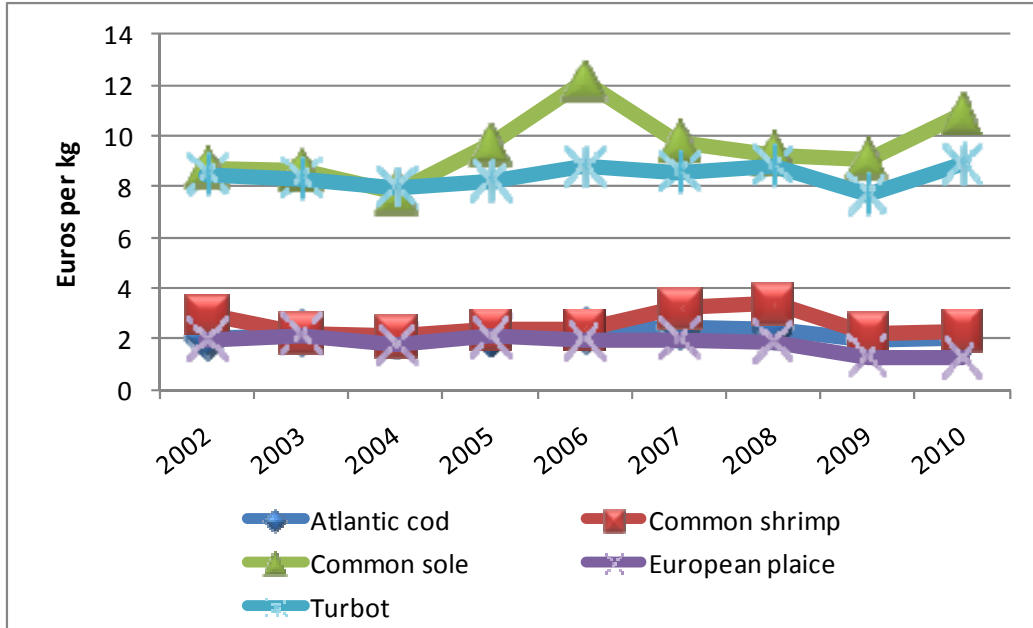
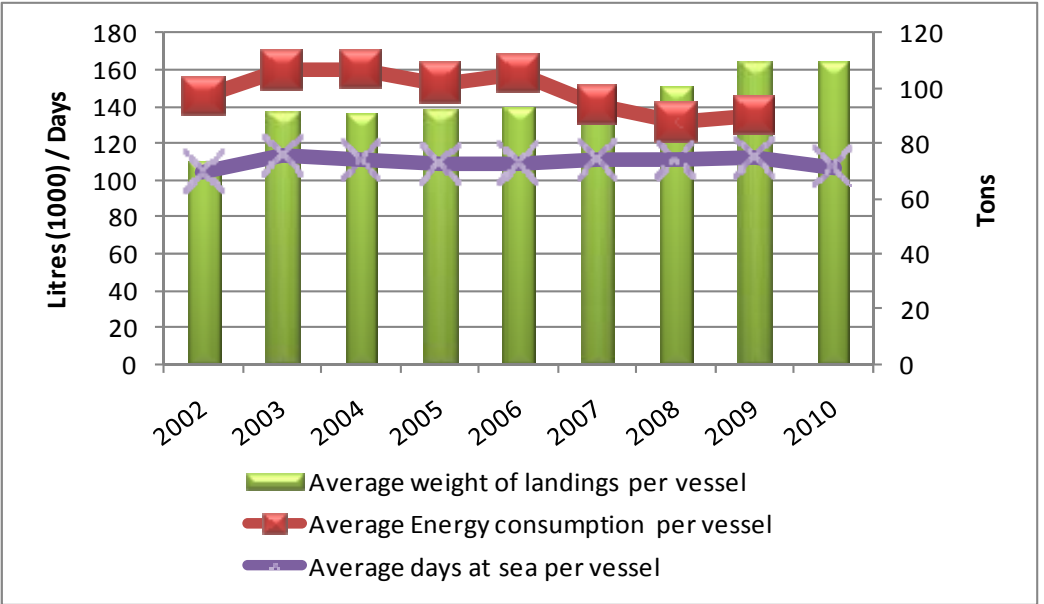
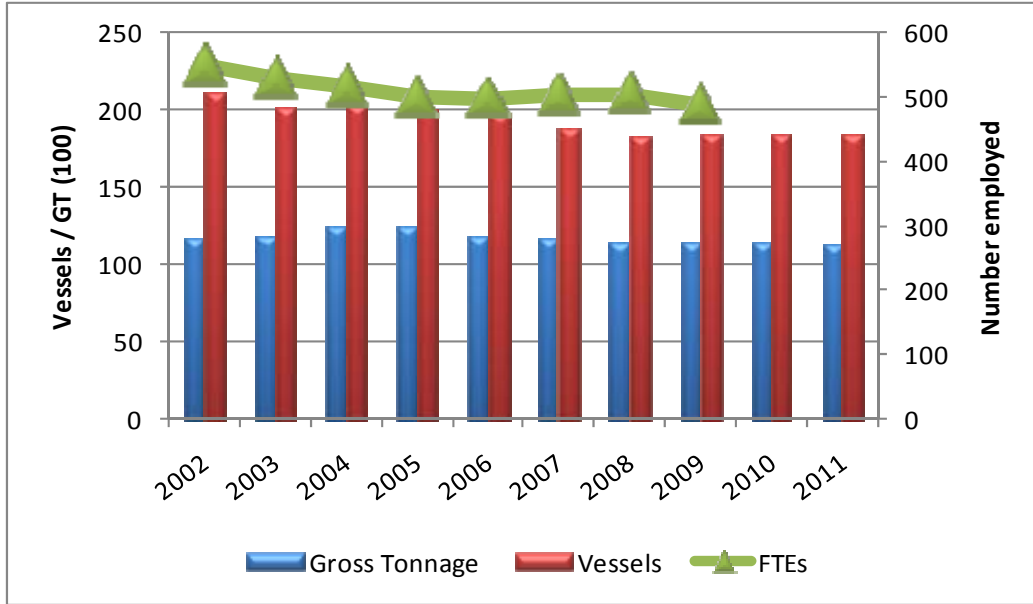






Top left: GVA as % of Income  
 Top right: OCF as % of income  
 Bottom left: Profit / loss as % of income

Greece and Spain fleets excluded



- Small increase in EU level employment and average wages in 09 from 08 but both lower than earlier years
- Total EU fleet volume and value of landings both decreased again in 09 from peak in 07
- 1<sup>st</sup> sale prices of most main species were either stable or decreasing between 08 and 09 – particularly demersal
- Total EU fleet income and expenditure on crew wages increased in 09 from 08, expenditure on fuel decreased in 09 from 08
- Gross value added and cash flow increased in 09, however EU fleet moved from profit to loss making position overall due to increase in capital costs
- EU fleet made estimated overall loss of -4.6% of total income in 09 when direct income subsidies not taken into account
- Fuel intensive, mixed fishery mobile gear vessels least profitable

- Overall, improvement in data coverage compared to previous year.
- Quality of some initial submissions still poor – JRC addressed quality issues with MS
- Compliance in terms of timely submission requires improvement.
- Most Member States datasets have some coverage and quality issues for specific variables and or segments and or years
- This year, Member States who have not submitted significant amounts of the data requested are:
  - **Greece:** No data of any type for 2007, 2009
  - **Spain:** Improvement, but no landings values by species submitted for any year, only 1/3<sup>rd</sup> of national fleet landings volumes submitted and missing some key segments - incomplete