

EWG 21-03 & EWG 21-08

AER 2021

Chaired by:

Natacha Carvalho

Raúl Prellezo

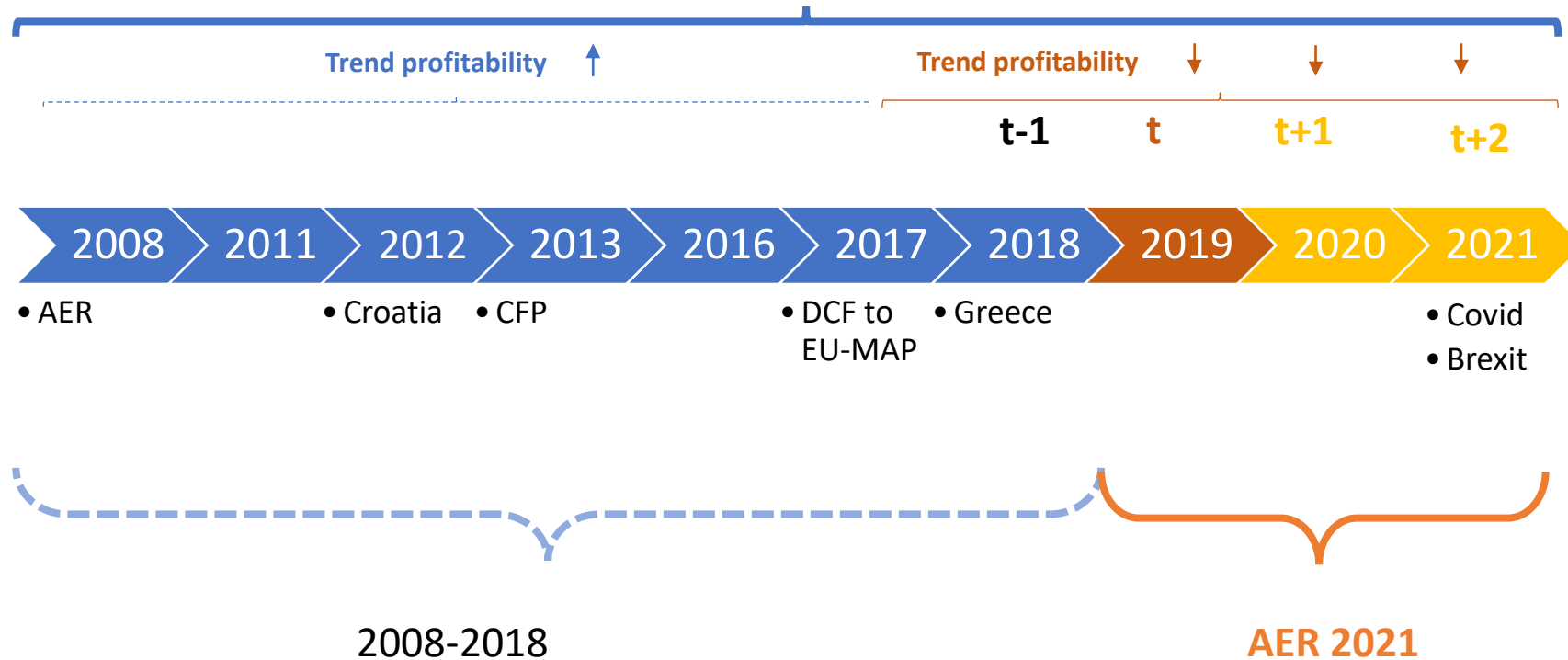
Presentation to the LDAC

16-02-2022

- 25 + 25 experts (including LDAC)
- 2 STECF members
- 2 JRC experts
- Support of the IT team of the JRC
- 5 observers (including MAC, NWWAC)
- and 2 x virtual meetings

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Timeline



EWG 21-03 & EWG 21-08

In four sentences

- Prior to 2017 reduction in the number of vessels although, individually, more profitable;
- In 2017-2019 we cannot say this;
- In 2019 profitability went down quite intensively.
- However, the EU fleet is profitable and is expected to be in 2020-21.

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Contents

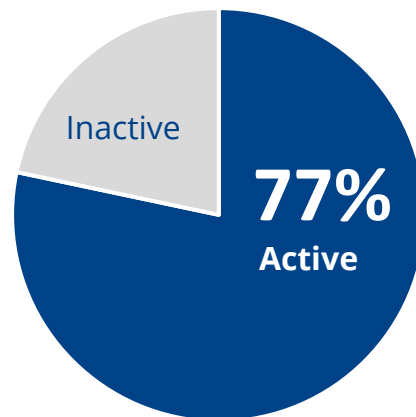
- EU overview ➤ All, SSCF, DWF; LSF;
DTS; TCA; FUEL
- National chapters ➤
➤ 2019
➤ 2019 vs 2018
➤ 2019 vs 2018-2008
➤ 2020 (nowcast)
➤ 2021 (forecast)
- Regional chapters ➤
➤ MED, BKS, BS; NSEA; SWW;NWW
➤ OMR;
➤ LDF: ICCAT, CECAF, IOTC; NAFO;
- Annexes ➤
➤ Nowcast methodology
➤ Tables and more tables

EU 27
2019

4.0 M tonnes
Landings

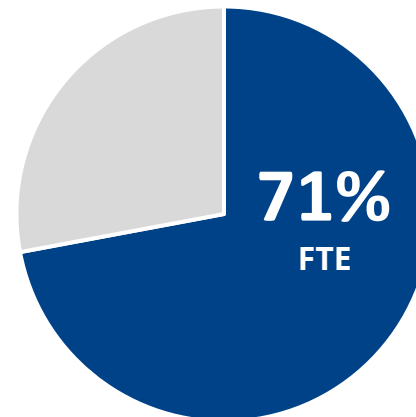
EUR 6.1 billion
Value of landings

FLEET



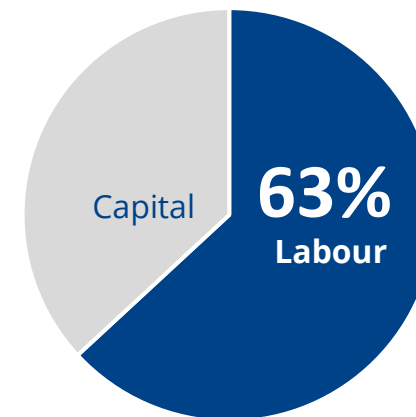
73 983
Total vessels

CREW



129 540
Fishers

GVA



EUR 3 370 M
Contribution to GDP

EU 27
2019 vs 2018

-9.6%

Landings

FLEET



-1.4%
Total vessels

CREW



-4.1%
Fishers

-6.2%

Value of landings

GVA



-10.7%
Contribution to GDP

EU 27
2019
DWF

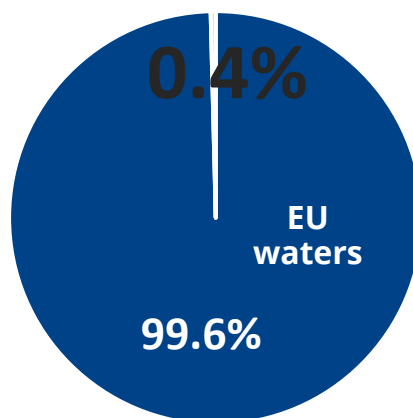
0.7 M tonnes (17%)

Landings

EUR 0.97 billion (16%)

Value of landings

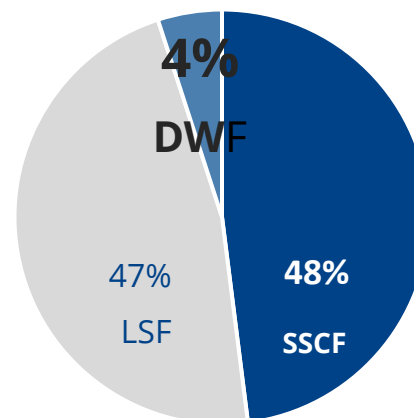
FLEET



259

Active vessels

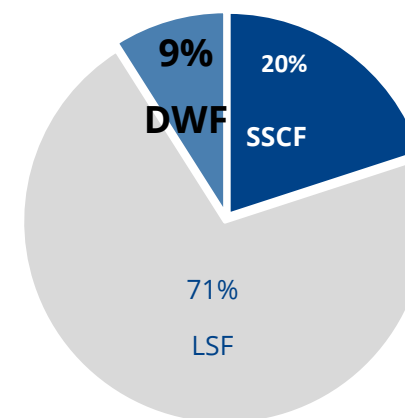
CREW



6 465

Fishers

GVA



EUR 301 M

Contribution to GDP

EU 27
2019 vs 2018
DWF

-2.4%

Landings

-2.0%

Value of landings

FLEET



+3.6%
Active vessels

CREW



+4.5%
Fishers

GVA



-22%
Contribution to GDP

Background information

- With 17% of the landings, these are relevant EU fleets.
- In the AER structure, DWF belongs to the OTHER FISHING REGIONS (OFR), divided in:
 - OR: Canary islands, Azores, Madeira and French OR. (SSCF)
 - DWF: over 24m and 50% of the effort in non EU waters (LSF)

Background information

- In the last years, special effort has been made to fully cover this segment.
- One independent expert (from the LDAC) coordinating this chapter. Your support is essential.
- Extra effort asked to the MS to provide geo indicators.
- Still further extra work required to provide a full coverage of DWF:
 - Identification of drivers affecting the economic performance.
 - Relate them to the situation of the different segments.

Northwest Atlantic Fisheries Organization NAFO

- EWG decided only fleets > 18 m LOA at least 20% of a fleet segment's total landed value taken from NAFO, excluding ICCAT major species.
- Value of landings in the 2010-2018 range, although mean price reduced (from 3 to 2.4 €/kg).
- Reduction in revenue, GVA and profitability. Although profitable with better indicators for Portuguese trawlers than Spanish ones.

International Commission for the Conservation of Atlantic Tunas ICCAT

- EWG decided only fleets > 18 m LOA at least 20% of a fleet segment's total landed value taken from ICCAT major species.
- Value of landings increased, mean price similar (from 2.6 to 2.5 €/kg).
- MED higher prices (directed mainly to Bluefin tuna and swordfish).
- Slight decrease in revenue and profits, although profitable and stable margins.

Indian Ocean Tuna Commission IOTC (LDF)

- EWG decided only fleets > 18 m LOA at least 20% of a fleet segment's total, although a description of the segments with landings in the RA.
- Mainly tropical tunas. PS and longliners, while PS increasing their dependency on Indian vs Atlantic.
- Only EU vessels.
- Lower landings in weight and value than in 2018.
- Related to the increased share of skipjack (lower price) vs yellowfin (higher price). Also; quotas on yellowfin.
- Profitable segments but lower than before.

Fishery Committee for the Eastern Central Atlantic CECAF

- Overlaps with ICCAT, so focused on small pelagic and demersal fisheries.
 - 13 segments of 23 (including ICCAT). 81% of the vessels but 43% of landings value
- Better performance than in 2018
- Difficult to provide an overall assessment. FR (mostly ICCAT species); ITA, DEU, LTU mainly demersal and/or small pelagics. SPA and PRT, 60-66% ICCAT.
- Profitable in 2019 (vs negative in 2018).
- Still really demanding analysis.

The North East Atlantic Fisheries Commission NEAFC

- EWG decided only fleets > 18 m LOA at least 20% of a fleet segment's total, excluding ICCAT regulated species.
 - Atlantic mackerel, herring, cod and blue whiting (RA) represent 1/3 of the more than 10 million tonnes landed in the CA.
 - Difficult to provide an overall assessment due to lack of disaggregated data.

NOWCASTING Methods

Reported	Non reported	North Atlantic	Mediterranean
Number of vessels	Costs	TAC	Effort
Days at sea (t+1)	Employment	Biomass	Biomass (when available)
Value of landings (t+1)	income	Quota uptake	

**Well established methods but in 2020 the COVID-19 came
And in 2021, COVID+Brexit.
Some failures in 2020. In 2021 we went back to the original system.**

NOWCASTING

Which are the variables used to nowcast?

Number of vessels	EU fleet register
TACs	Council regulations
Swaps	FIDES
Quota uptake	FIDES
SSB	Stock assessment
Fuel Costs	EUMOFA
Market Prices	
Inflation	CPI Eurostat

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The End

Happy to respond any question or
feedback that you have or send it to:

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