

2018 Annual Economic Report of the EU fishing fleets

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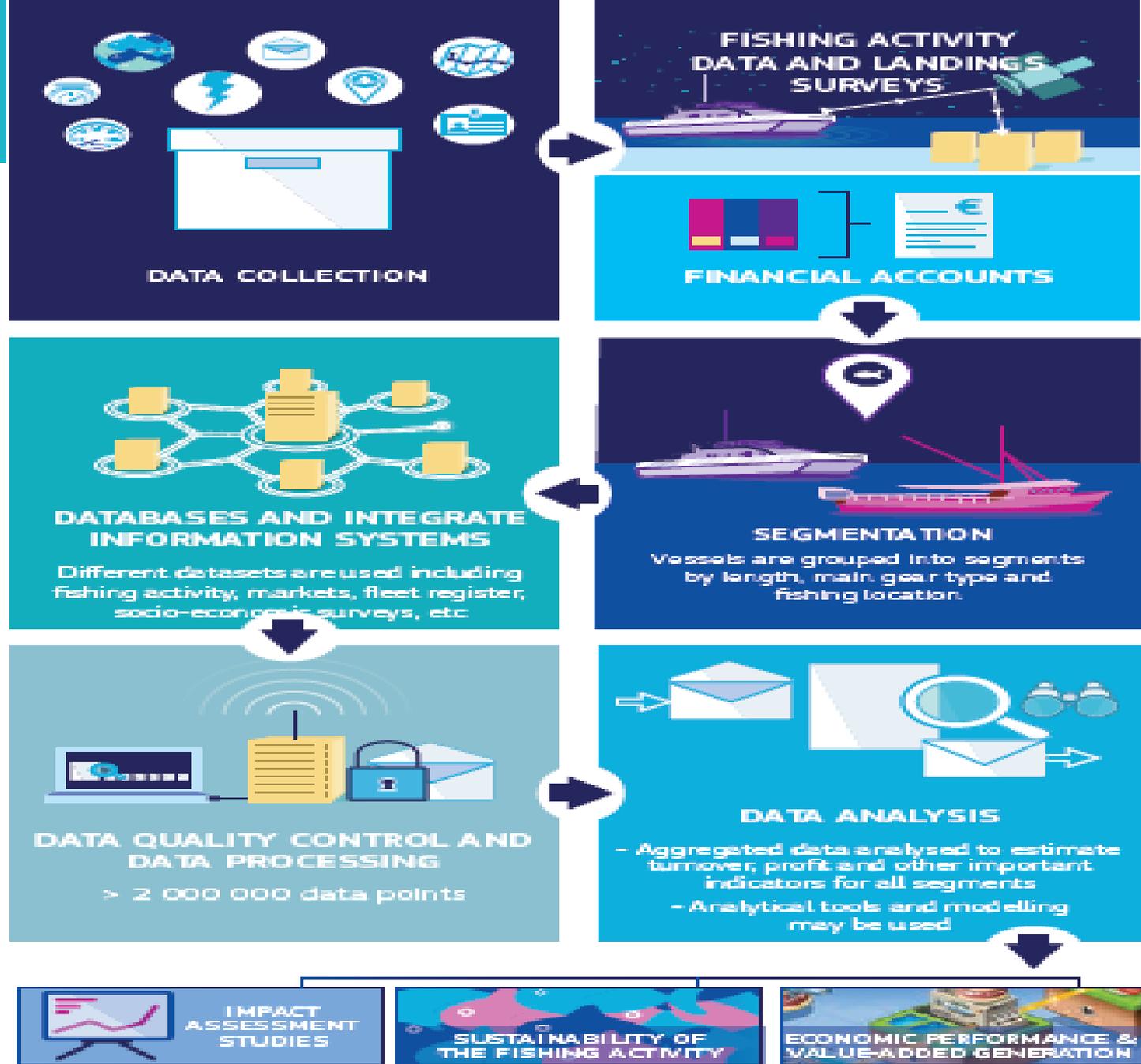
Outline



1. Process, quality and policy uses
2. EU overview: main indicators
3. Main trends
4. Future developments



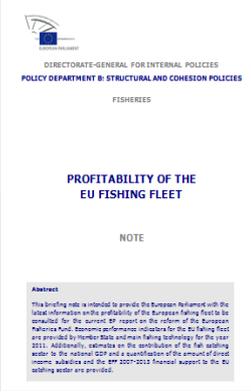
Data collection process



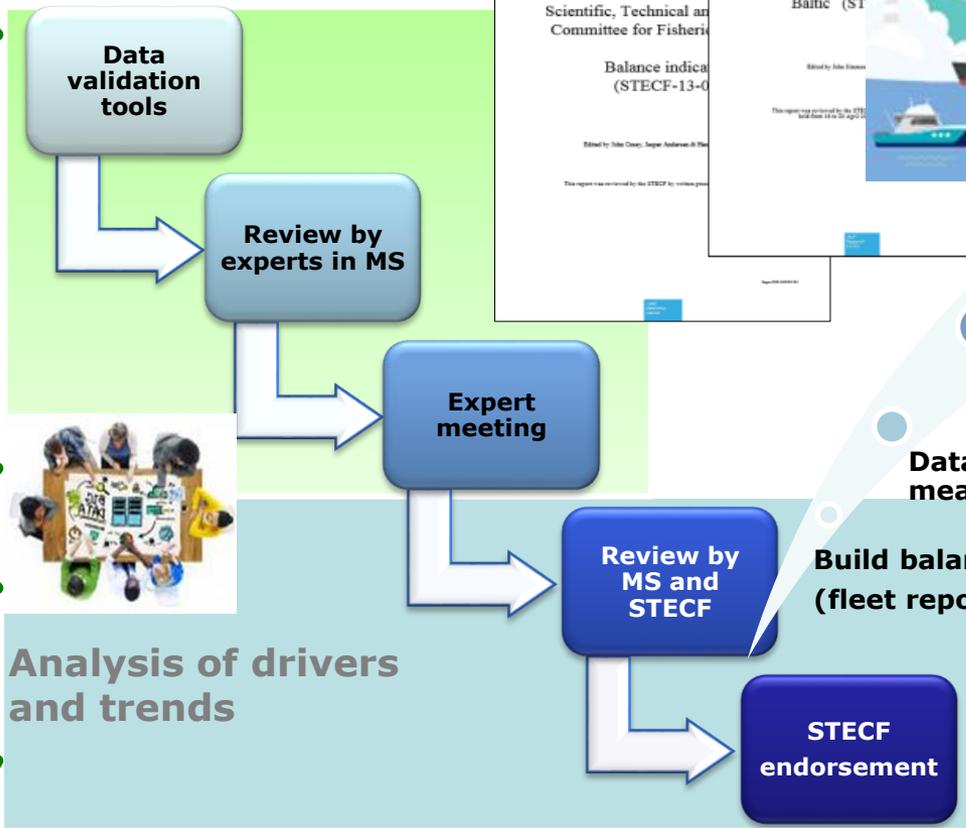
1. Data quality and policy uses



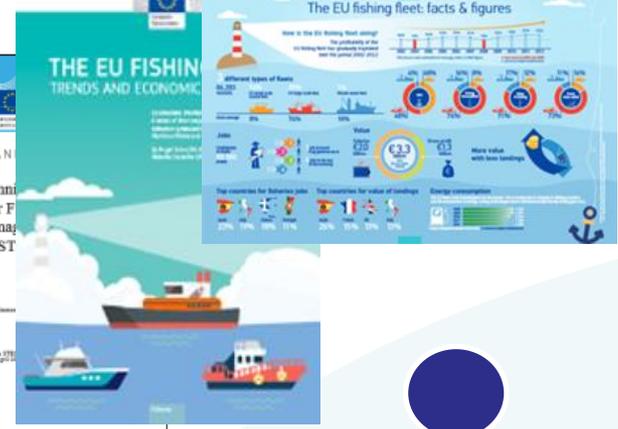
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Data quality checks



Analysis of drivers and trends



Economic impacts of TACs

MS and external organizations (FAO, OECD)

Evaluation and implementation of structural policies.

Support for IA and policy analysis

Data reference for evaluations of conservation measures (management plans)

Build balance indicators (fleet reports)

Policy support



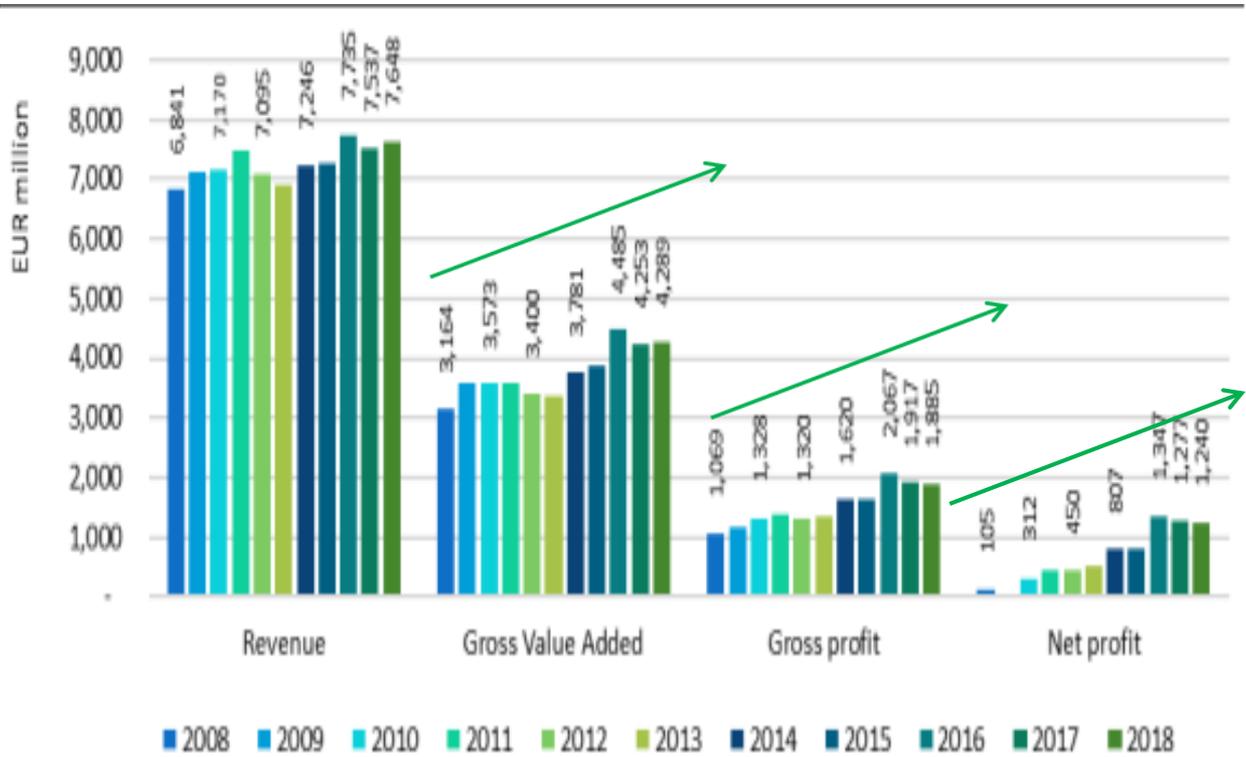
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Main results



Good news...



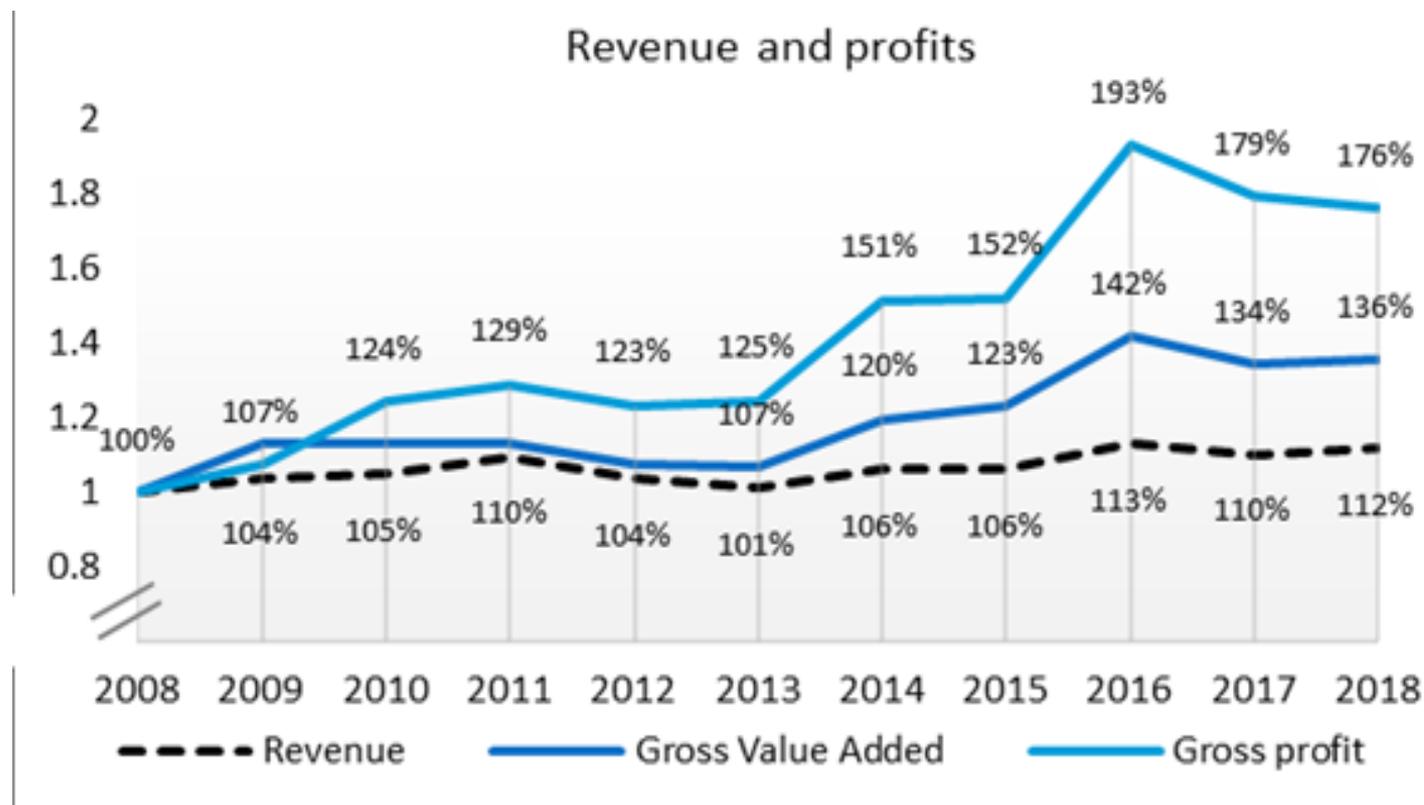
Main drivers:

- (1) higher "landings per unit of effort",
- (2) higher average prices for various species,
- (3) lower total costs.

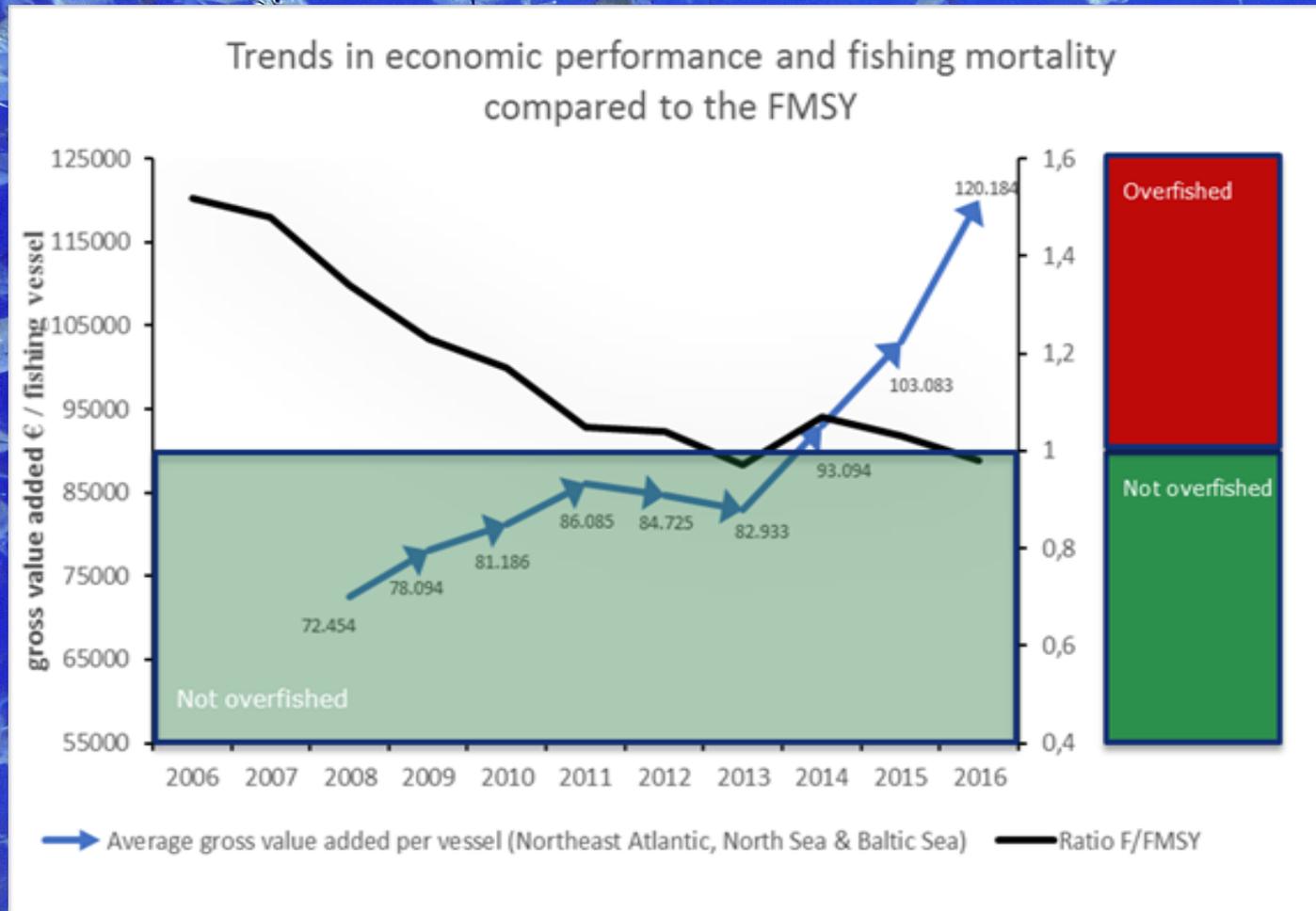
Good news...



High growth in revenues and profitability



TRENDS IN THE EU FLEETS : CONSERVATION PAYS OFF

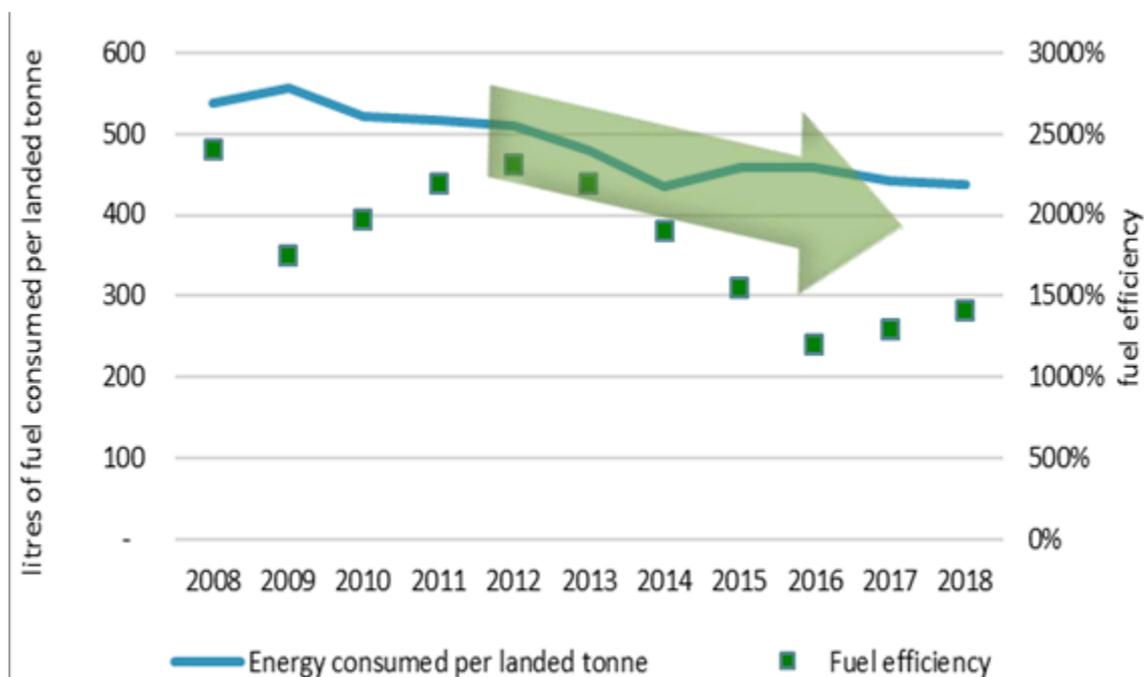


Good news...

Progress in fuel efficiency

Improvement of 12% in fuel efficiency over the period 2008-2016

Fuel efficiency "energy consumption/fish landed"

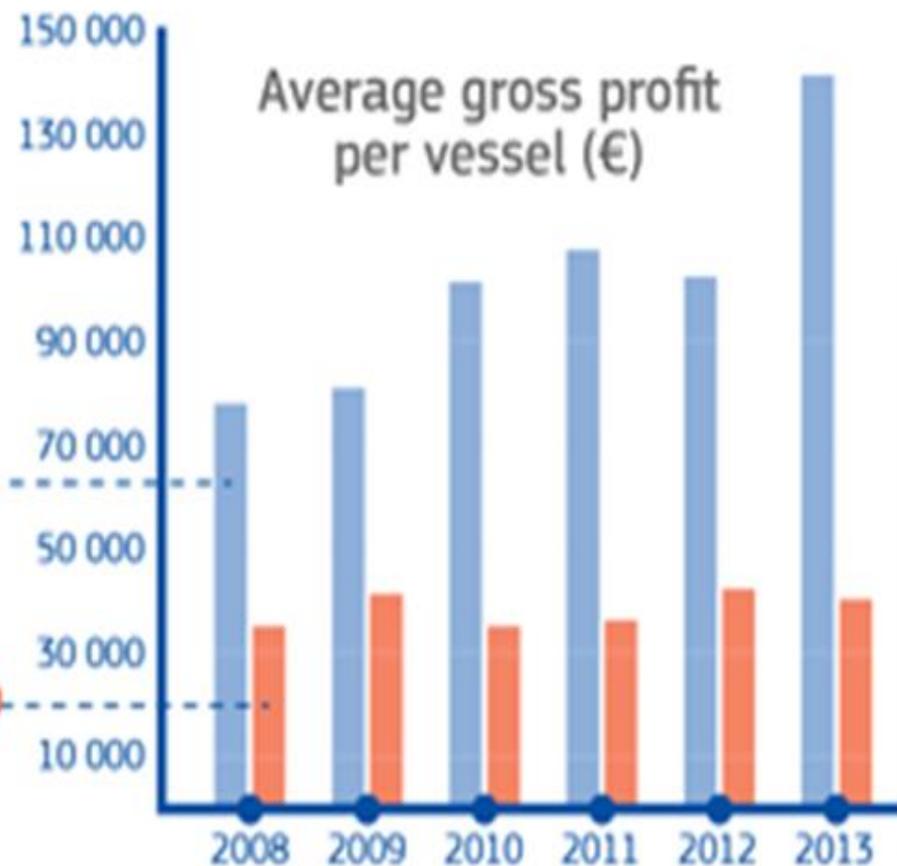




And the challenges ahead...

- **25% of the EU fleets still in losses**
- **5 national fleets still suffering net losses in 2016.**
- **The economic performance of many EU fleets in the Mediterranean region, although profitable, continues to stagnate.**
- **The economic performance of several SSCF fleets, although profitable, continues to stagnate or show limited improvement.**
- **Employment in some EU fleets/regions continues to decline.**

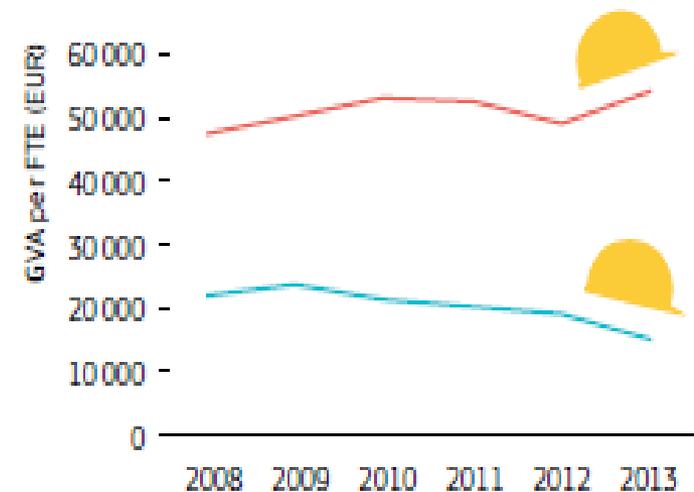
Main results



The bad news...

Labour productivity falls in the SSCF: conservation measures and EMFF support on innovation, advisory services, professional training, lifelong learning, etc...

Employment in the EU fleet continues to decline: EMFF support for young fishermen, diversification of income, health and safety, etc...



What explains the good and bad news?

Progress towards MSY and recovery of some stocks.

Overexploitation of some EU stocks.

Public support to valued added and cost saving projects:

Poor marketing and market saturation

Innovation projects

Implementation of certification schemes and better marketing

Limited access to credit

More fuel efficient fishing techniques

Shortage of local crews, particularly young

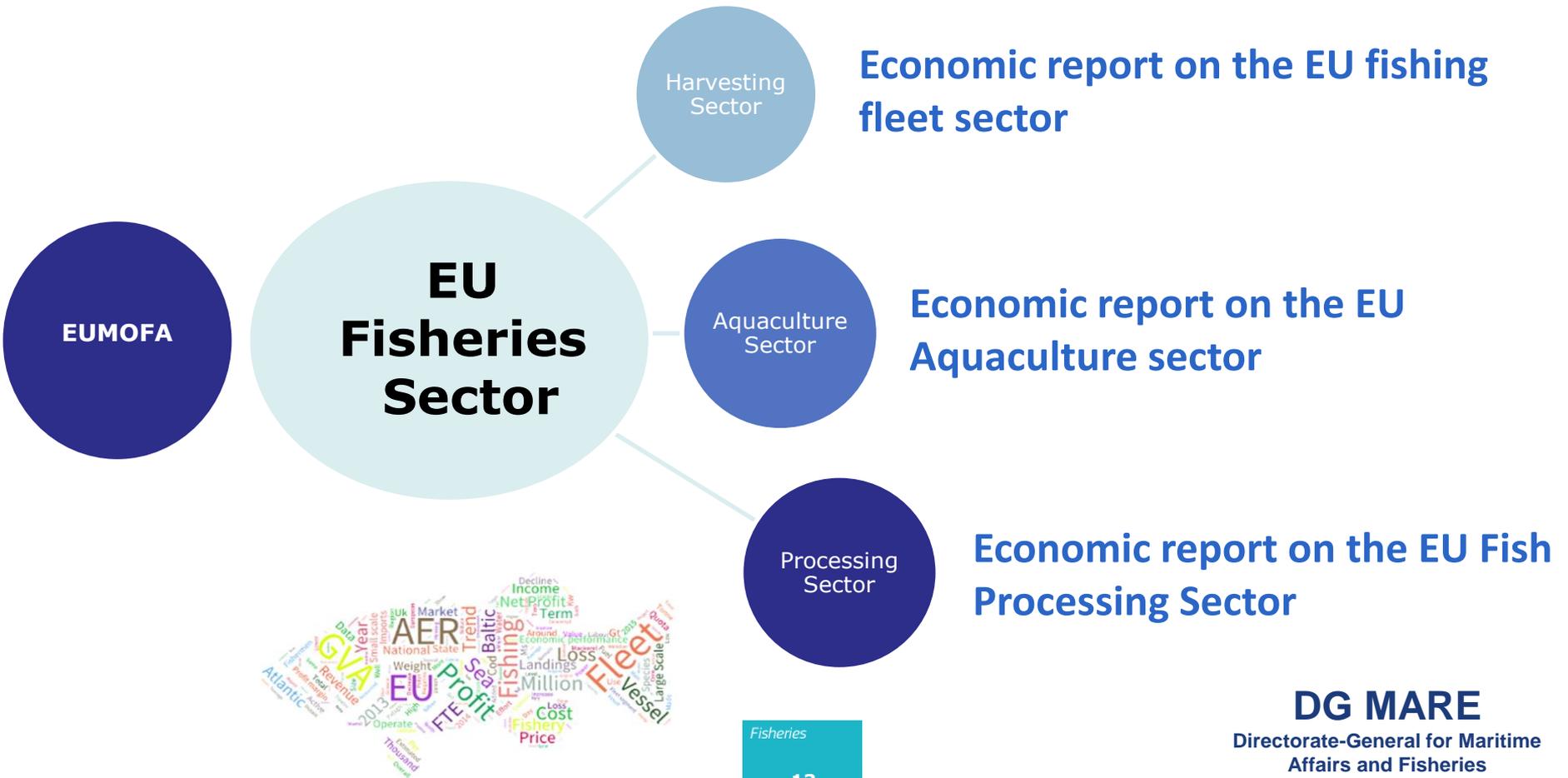
Training to upgrade fishermen's competences

fishermen

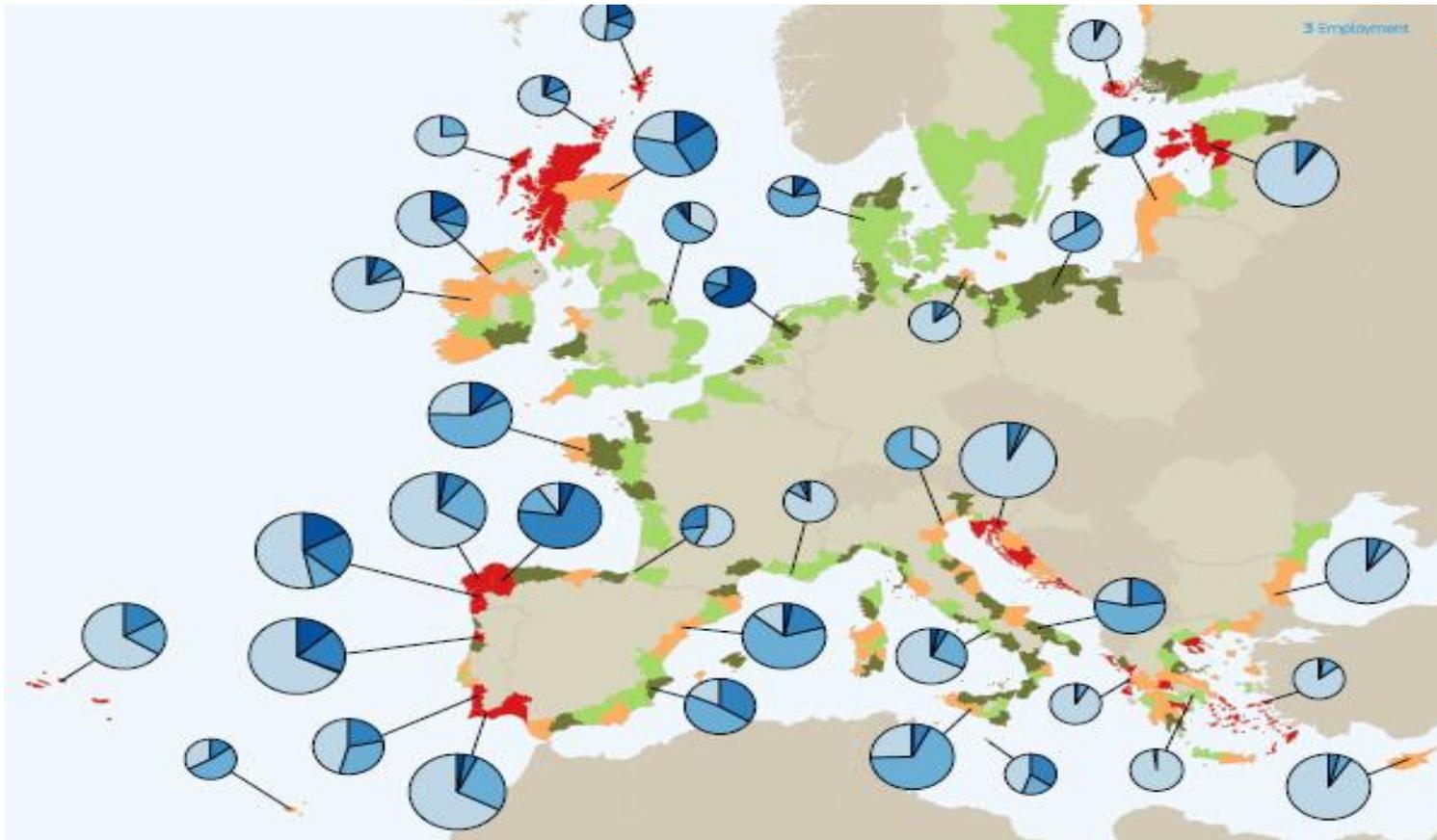
External factors.

3. Other EU economic and market data sources to support policy analysis

INTEGRATED ANALYSIS OF THE EU FISH VALUE CHAIN



Concentration of the fisheries dependency in in several EU regions and communities



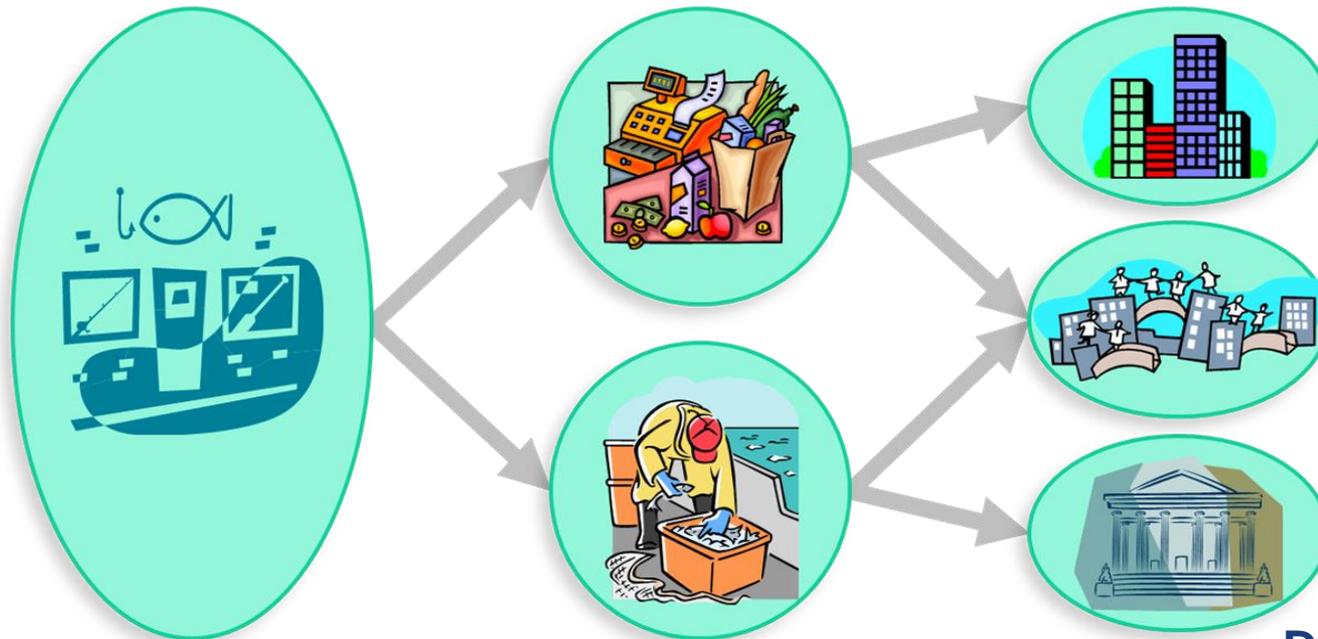


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Analysis of ancillary activities: multipliers of the SSCF and LSF

Study on the economic importance of activities ancillary to fishing in the EU

<https://bookshop.europa.eu/en/study-on-the-economic-importance-of-activities-ancillary-to-fishing-in-the-eu-pbEA0116931/>





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Thank you!