

EWG 21-03 & EWG 21-08

AER 2021

Chaired by:

Natacha Carvalho

Raúl Pallezo

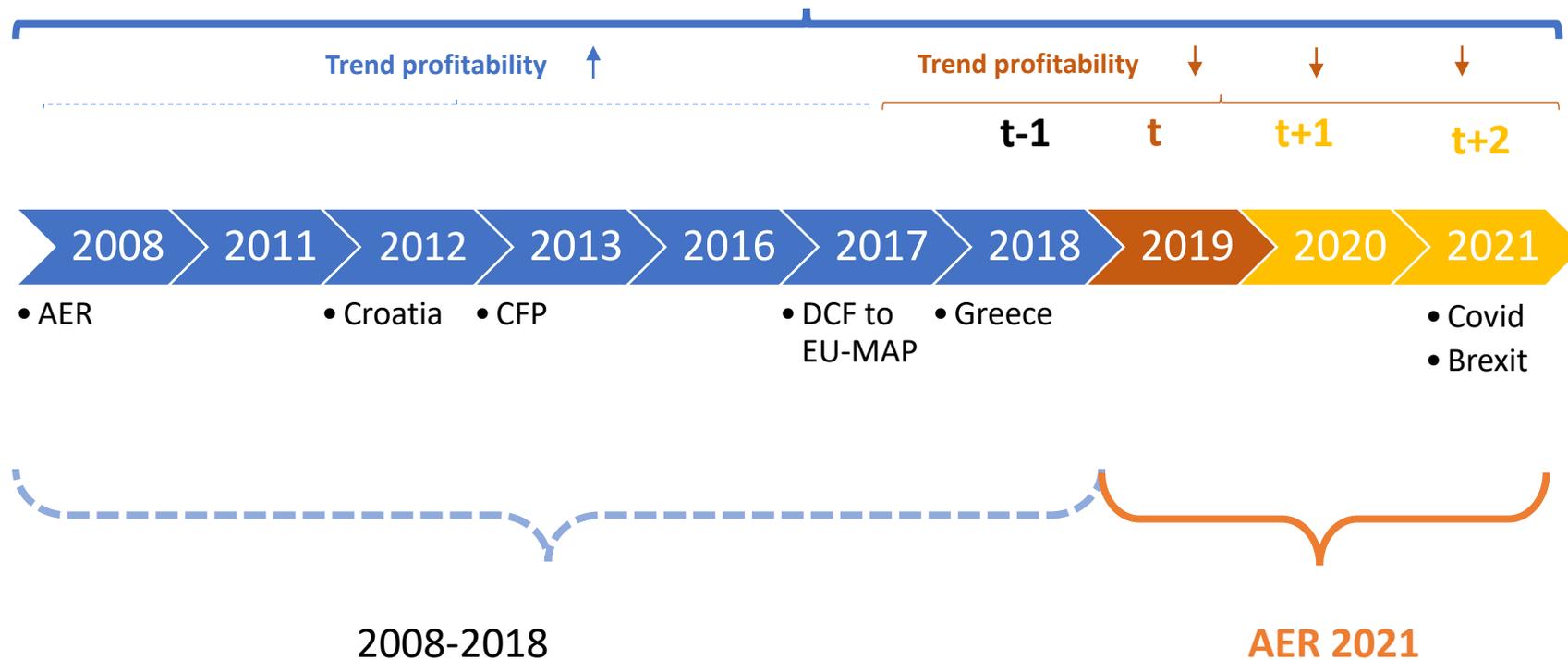
Presentation to the MAC

25-01-2022

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

AER

Timeline



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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

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**Let's talk about
2019 (or year t)**

EU 27
2019

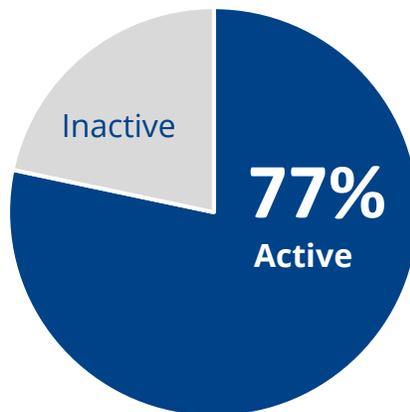
4.0 M tonnes

Landings

EUR 6.1 billion

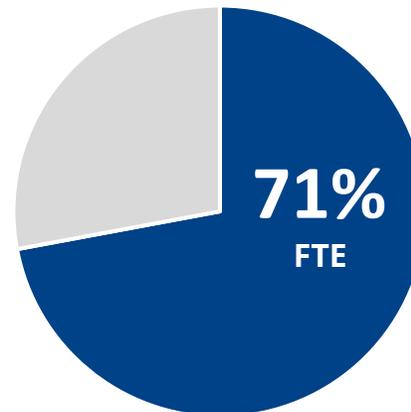
Value of landings

FLEET



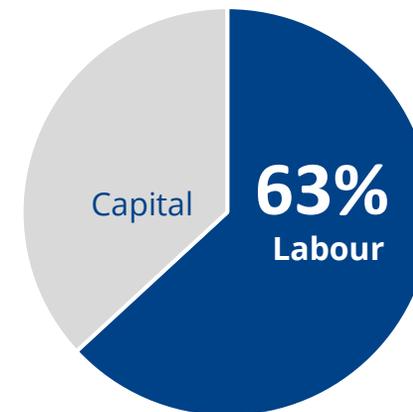
73 983
Total vessels

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

SSCF

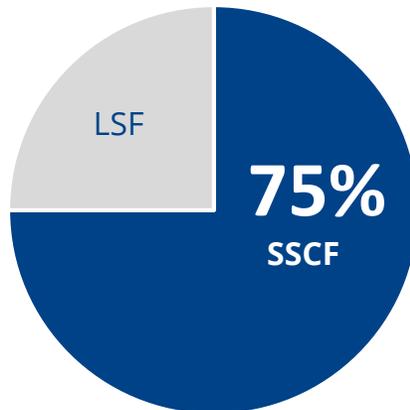
0.22 M tonnes

Landings

EUR 0.96 billion

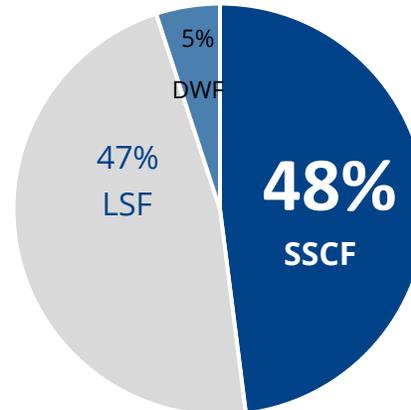
Value of landings

FLEET



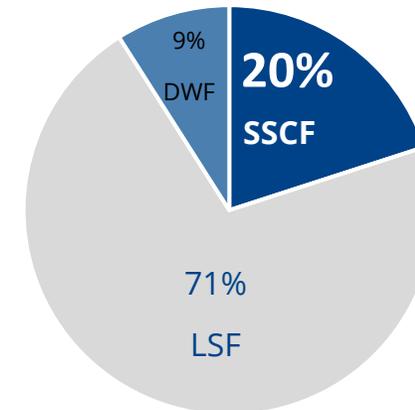
42 838
Active vessels

CREW



62 650
Fishers

GVA



EUR 678 M
Contribution to GDP

EU 27

2019 vs 2018

SSCF

-8.1%

Landings

+0.4%

Value of landings

FLEET



CREW



GVA



-2%

Active vessels

-3.2%

Fishers

-1.5%

Contribution to GDP

EU-27

LSF vs. SSCF vs. DWF

2019

- Overall, **LSF and SSCF's profitability margins go down**. But:
 - SSCF: In the MED, BS and NSEA **up**;
 - SSCF: SWW and NWW **down**;
 - **SSCF: Baltic almost collapses**.
 - LSF's profitability down except in the Mediterranean.
 - Gap in profitability between SSCF and LSF **reducing**.
- Average wages much higher in LSF, but SSCF values biased by mixed rents.
- DWF with only 0.4% of the fleet account for 14% of the landings (value and weight) and aprox. 10% of the GVA.
 - Profitability margins of DWF worsened compared to 2019.

LSF drives the EU
Overview

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**Let's talk about
2020 (or year $t+1$)**

Nowcast 2020

Is **not an Impact assessment** of the COVID-19 on EU fisheries, is the usual AER nowcast.

Economic performance in 2020 was obtained by applying the observed and anticipated drivers and variables, where in this case, COVID-19 is an important driver, but not the only one considered.

Compared to 2019

- Landings decreased 1% in weight and 4% in value.
- GVA increased 1% and gross profit 9%.
- SSCF decreased 4 and 5%, GVA and GP respectively, while LSF increased by 3% and 11%
- Fuel price decreased 21%.

Challenging to differentiate what effects are directly related to the COVID-19 pandemic and to what extent (e.g. fuel prices).

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**Let's talk about
2021 (or year $t+2$)**

Forecast 2021

Is **not an Impact assessment** of the COVID-19 + Brexit, is the usual AER forecast.

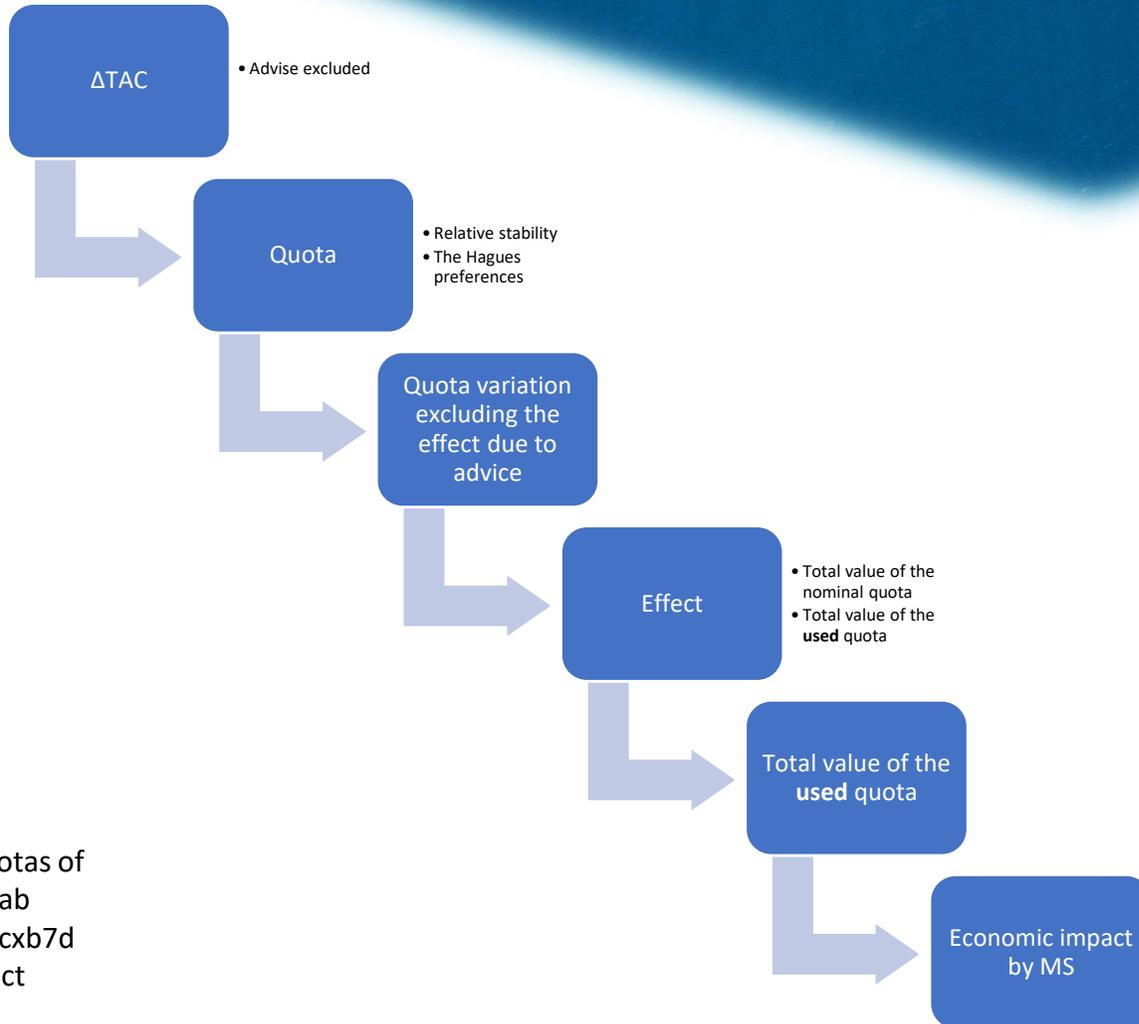
Compared to 2020	Compared to 2019
<ul style="list-style-type: none"> ➤ Real prices relatively up (+1%) ➤ Fuel costs up (16%). ➤ Activity moderately affected ➤ Landings (-1.8%); Value of Landings (-0.8%). ➤ Gross profit (-6.9%) 	<ul style="list-style-type: none"> ➤ Real prices relatively constant ➤ Fuel costs down (-6.7%). ➤ Activity severely affected: ➤ Landings (-2.8%); Value of landings (-3.6%). ➤ Gross profit (-14.3%)

No recovery for SSCF and LSF in 2021 compared to 2019 and 2020

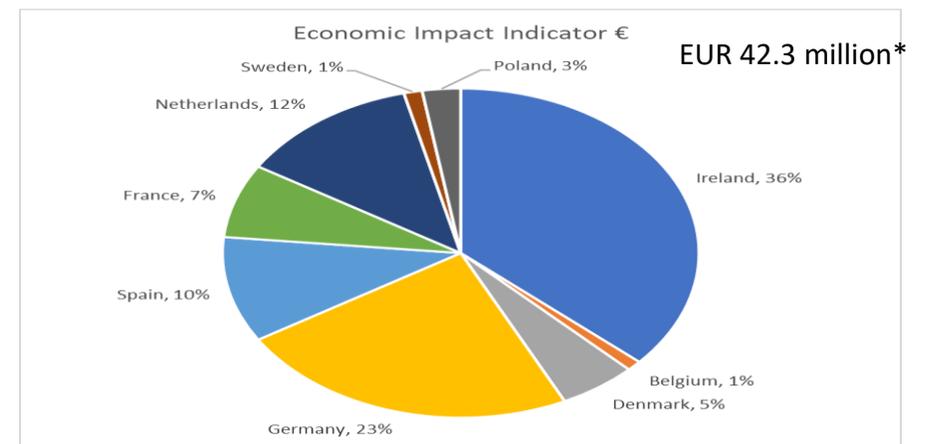
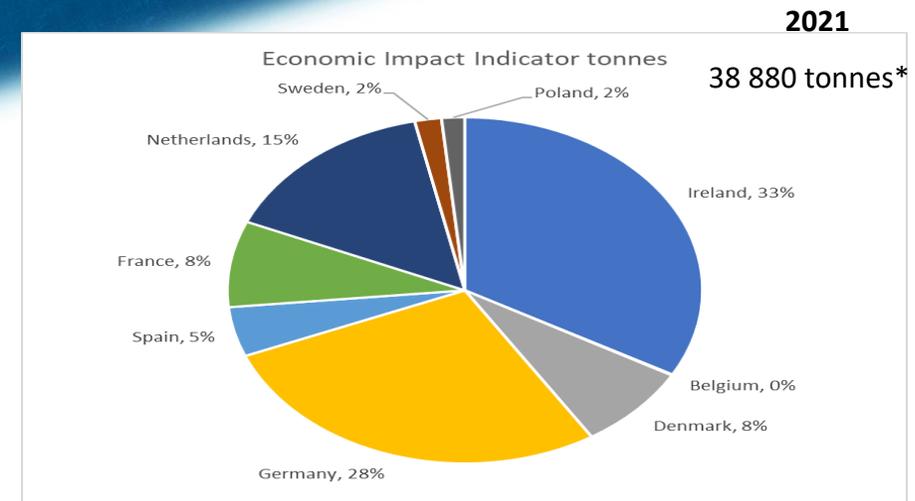
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TCA (Brexit)

TCA (TACs and quotas 2021-2025)



*Final quotas of Herring 4ab
Herring 4cxb7d
Not correct

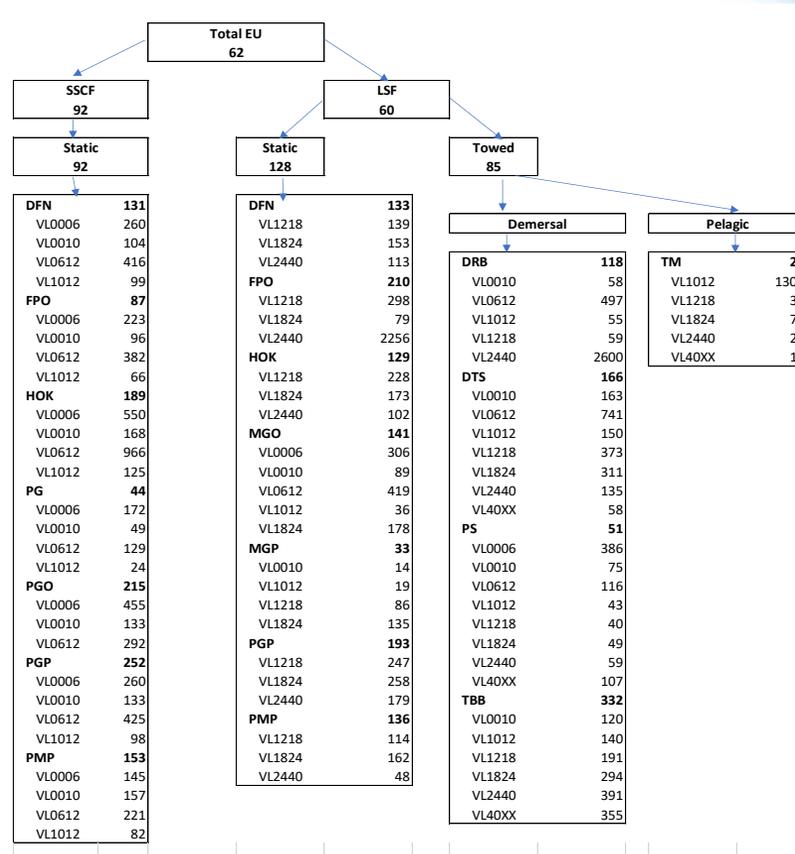


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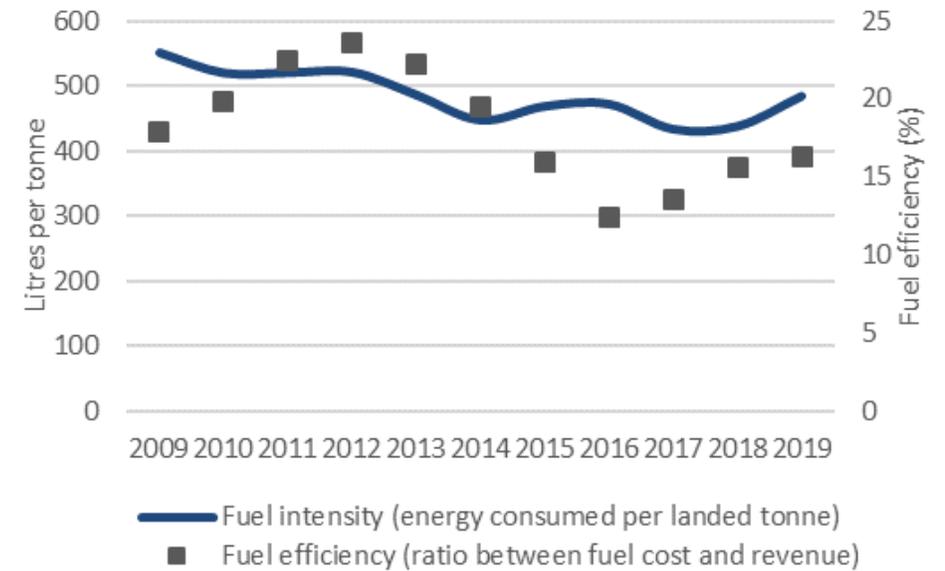
FUEL

FUEL

Litres per landed tonne



Intensity and efficiency



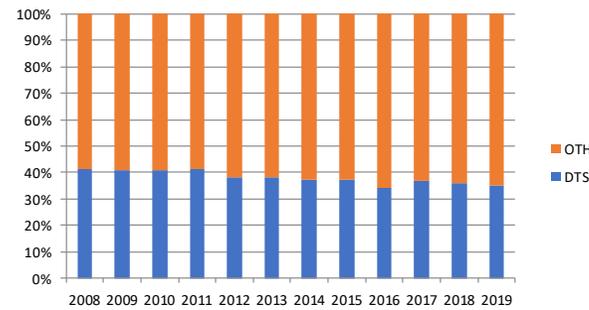
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Trawlers

Trawlers

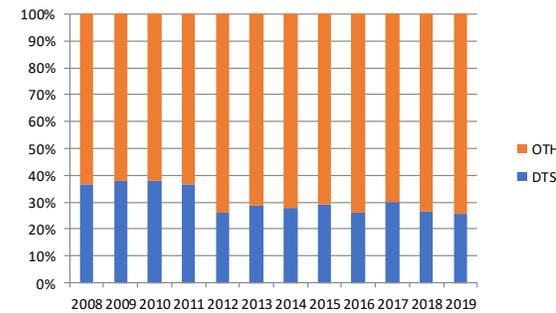
Landed value

35%

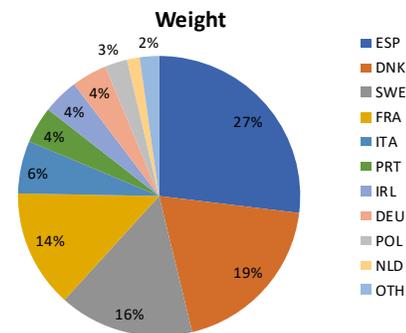


Landed weight

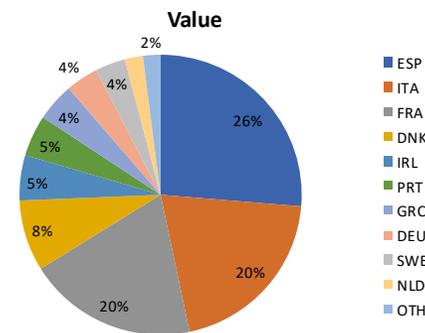
26%



**Spain
Denmark
Sweden
France**



**Spain
Italy
France**



Take home messages

- Economic performance down although profitable (some exceptions such as the SSCF in the Baltic).
- COVID-19, effects not clear. Because other costs (e.g fuel prices changed).
- In any case anticipated differences among SSCF (seem to be more affected) and LSF
- We had specific chapters on trawlers, fuel, Brexit,...
- It is not easy to handle (too) many specific chapters...,
- Because our priority is to have the best data as possible and provide the best overview.

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The End