



Advice

STECF's Annual Economic Report on the EU Fishing Fleet (2024)

Brussels, 31 January 2024

1. Background

The Scientific, Technical and Economic Committee for Fisheries (STECF) publishes, every year, the Annual Economic Report on the EU Fishing Fleet¹, which provides a comprehensive overview of the latest information available on the structure and economic performance of EU Member State fishing fleets, for example on fishing capacity, effort, employment, landings, income and costs. The 2024 report is expected to cover the period 2008 to 2024 with 2022 as the reference year and nowcast performance estimates for 2023 and 2024.

As highlighted in previous advice², the report has particular relevance for the work of the Market Advisory Council (MAC) and is highly valued by the EU fishing fleet and by the other relevant stakeholders. Ahead of the 2023 report, the MAC adopted advice with several recommendations to DG MARE³, including on timeline and potential time gaps, data collection, social variables, national and special chapters, and the breakeven fuel price point.

2. Timeline and potential time gaps

¹ The reports are made publicly available on the [website](#) of the Joint Research Centre (JRC).

² On 23 September 2020, the MAC adopted [advice](#) on "Data Collection by the Scientific, Technical and Economic Committee for Fisheries (STECF)", which included a section dedicated to this economic report.

³ The mentioned [advice](#) was adopted on 3 February 2023.



The 2024 edition of the Annual Economic Report on the EU Fishing Fleet will cover the 2008-2024 period and use 2022 as the reference year and include nowcast and forecast performance estimates for 2023 and 2024.

In the view of the MAC, the timing of the nowcast should be extended to ensure a better alignment between the economic advice and the scientific advice on the status of the stocks. Through the use of proxies from the fish price, it should be possible to have better data to estimate nowcast performances. A specific *ad hoc* contract could be set up by the Commission services to investigate how to develop a common method for nowcasting as well as how to improve data access in the most recent year.

3. Data collection

Under the multiannual programme for data collection (EU MAP)⁴, social variables are required to be collected every three years, which leads to a time gap. The quality and relevance of the data would be much improved if it was as up to date as possible. Since the compilation and analysis of the data requires significant expertise and human resources, this could be achieved via a web-based data format where sections of the data and their encompassing data could easily be updated regularly in accordance to the availability of each Member State. Additionally, it would also be important, for the analysis of the data, if the collection would differentiate between whether topics are not relevant to specific Member States or whether there is no data available.

⁴ Commission Delegated Decision (EU) 2021/1167 establishing the multiannual Union programme for the collection and management of biological, environmental, technical and socioeconomic data in the fisheries and aquaculture sectors from 2022, and Commission Implementing Decision (EU) 2021/1168 establishing the list of mandatory research surveys at sea and thresholds as part of the multiannual Union programme for the collection and management of data in the fisheries and aquaculture sectors from 2022.

4. Social variables

In the context of the report, data is collected on several social variables⁵. Unfortunately, work remains to be done on the utilisation and quality of the data, since there is data that is collected through the Member States on a yearly basis, but that it is not included in the report.

It is worth highlighting that the EU Social Partners in Sea Fisheries⁶ are in the process of providing feedback on social variables to acquire social data in fisheries, particularly focusing on the variables suggested in Annex 3 (variables, indicators, sources) of the STECF report 23-17 on social variables⁷. In their view, it would be important to update the systematic comparative analysis across the EU on fishing dependency, as it is currently based on a report from a decade ago⁸.

5. National chapters

The report includes specific chapters for each EU Member State. These chapters can be extensive and complex to read. Therefore, it would be useful to also include shortened tailor-made reports directed at the end-user. Alternatively, the chapters could be made easily accessible through an online platform where the user could select various data sets to obtain a tailor-made analysis, in a similar manner to the website of the Blue Economy Observatory or the facts and figures on the Common Fisheries Policy webpage.

⁵ E.g., Employment by gender, employment by age, employment by education level, employment by nationality, employment by employment status, FTE by gender, unpaid labour by gender. Some Member States collect data at enterprise level, others at employee level. Member States use different sampling strategies (e.g., census, probability sample survey or nonprobability sample survey).

⁶ The EU Social Partners are composed of Européche, ETF, and COPA-COGECA. More information is available here: <https://ec.europa.eu/social/main.jsp?catId=480&langId=en&intPageId=1851>.

⁷ <https://stecf.jrc.ec.europa.eu/documents/43805/72190453/STECF+23-17+-+Social+Data.pdf/8eec15c4-5d23-4b10-b4c3-ecab442f3bbf>

⁸ https://oceans-and-fisheries.ec.europa.eu/system/files/2016-09/final-report_en.pdf

In the context of the national chapters of the previous edition of the report, inaccuracies in fuel consumption information have been detected by fisheries operators. These have been brought up to the attention of the individual national authorities of the Member States.

6. Special chapters

The report can include special chapters on specific topics. In the view of the MAC, it would be relevant for the 2024 edition to include a specific chapter estimating the impacts of Brexit, while taking into account the impact on supply and on the market of the most recent UK's regulations, including on spatial limitations for fishing activities. Several topics that fall under social variables, such as overviews on fisheries certifications, medical examination, fisheries training and education institutions, and on fishing capacity, would also benefit from special chapters.

7. Vessels below 12 meters not included in the small-scale coastal fleet segment

In the view of the MAC, the segment distribution in the report should include an additional category to cover fishing vessels below 12 meters that are not part of the small-scale coastal fleet segment. This segment is particularly impacted by the conflict of uses in the marine space with other maritime activities. Therefore, precise data on their economic status is needed to monitor their profitability changes followed the crises faced by the sector. According to the fleet register, this segment only represents around 4.000 vessels. The coverage of this segment could be done through a special chapter.

8. Recommendations

For the 2024 edition of the Annual Economic Report on the EU Fishing Fleet, particularly the development the Terms of Reference for the corresponding STECF Expert Working Group, the MAC believes that DG MARE, with the appropriate involvement of STECF, should:

- a) Extend the timing of the nowcast exercises to ensure a better alignment between the economic advice and the scientific advice on the status of the stocks, including through the use of proxies from the fish price, the development of a common method for nowcasting, and improvement of data access;
- b) Improve the quality and relevance of the data collection on social variables, for example via a web-based data format to facilitate updates by Member States, plus the differentiation, in the data collection, between whether topics are not relevant to specific Member States and topics where there is no data available;
- c) Ensure that the data on social variables yearly collected by the Member States is fully utilised and included in the report, plus proceed with an update of the systematic comparative analysis across the EU on fishing dependency;
- d) Considering the complexity of the national chapters, include shortened tailor-made reports directed at the end-user or, alternatively, develop an online platform for tailor-made analyses;
- e) Include a special chapter estimating the impacts of Brexit, plus consider the inclusion of special chapters on social topics, such as overviews on fisheries certifications, medical examination, fisheries training and education institutions, and on fishing capacity;
- f) In the segment distribution, include an additional category for fishing vessels below 12 meters that are not part of the small-coastal fleet segment, or, if not possible, a special chapter dedicated to the described segment;
- g) When analysing and interpreting data on social aspects of fisheries management, take the opportunity to consult the EU Social Partners in Sea Fisheries, to benefit from the expertise and capacity of their experts and of their dedicated working group.