

STRUCTURAL CHANGES OF THE EUROPEAN FISHERIES FLEET: A PRELIMINARY ASSESMENT



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OBJECTIVES

- (i) Analyze major structural changes of European fisheries fleet
- (ii) Explore Common Fisheries Policy effects in community waters and third countries waters
- (iii) First results of references levels are presented

METHODOLOGY AND DATA BASE USED

Different information and data bases were consulted and analysed

- Community Multiannual Guidances Programmes decisions
- FAO FIGIS Database
- **EUROSTAT**: it allowed us classify different segments in

Inshore (0-24,9 GRT), **Coastal** (25-149,9 GRT), **Deep Sea** (150- 499,9 GRT), **High Sea** (> 500 GRT)

Weaknesses: a) Period 1990-2002 b) Not all capacity (vessels, tonnage and power) was included

RESULTS

- (i) Two processes were detected (a) Reduction of inshore and coastal fleets and technical development rates (b) Increase of Deep and High sea fishing capacity
- (ii) Fishing effort of European fleet is expanding in High sea and EEZ's of third countries

Inshore fleet reduction 1990-2002 (%)		
Vessel	GRT	KW
-10,0	-33,6	-12,2

Coastal fleet reduction 1990-2002 (%)		
Vessel	GRT	KW
-27,9	-18,2	-30,3

Inshore fleet - Technical development rate (EU average)					
1990			2002		
GRT/Vessel	KW/Vessel	KW/GRT	GRT/Vessel	KW/Vessel	KW/GRT
4,4	36,4	8,1	3,3	36,5	10,9
Coastal fleet - Technical development rate (EU average)					
59,1	255,6	4,3	63,8	242,1	3,7

Deep Sea fleet reduction 1990-2002 (%)		
Vessel	GRT	KW
+16,7	+17,4	-1,2

High Sea fleet reduction 1990-2002 (%)		
Vessel	GRT	KW
-11,8	+12,5	+6,4

Deep sea - Technical development rate (EU average)					
1990			2002		
GRT/Vessel	KW/Vessel	KW/GRT	GRT/Vessel	KW/Vessel	KW/GRT
245,9	705,0	2,8	247,4	594,2	2,4
High sea - Technical development rate (EU average)					
1.114,4	1.864,6	1,6	1.389,8	2.079,4	1,4



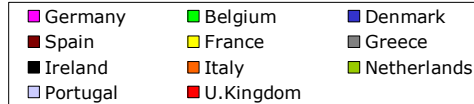
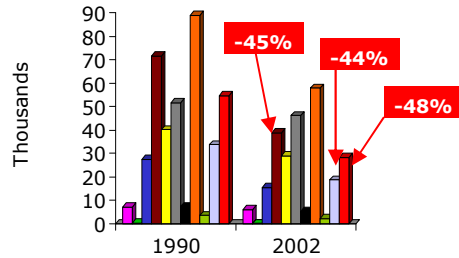
"Better resources uses and energy efficiency than large-scale fisheries"

- Measures to be adopted for small scale fisheries:**
- Rebuild marine ecosystems to ensure local communities activity
 - Preference fisheries rights must be accorded

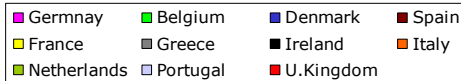
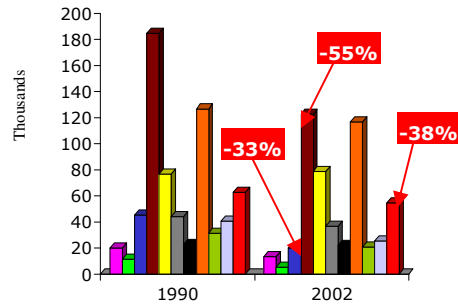


Inshore fleet (Tonnage)

Evolution in %



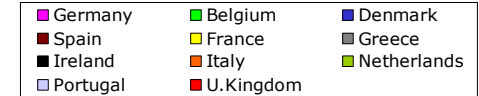
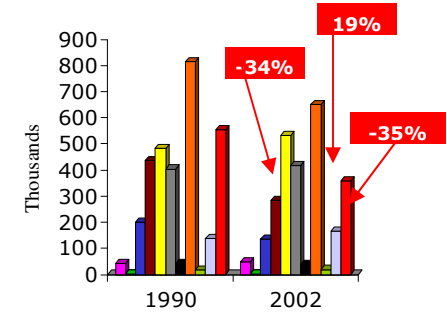
Coastal fleet (Tonnage)



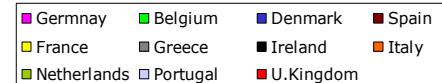
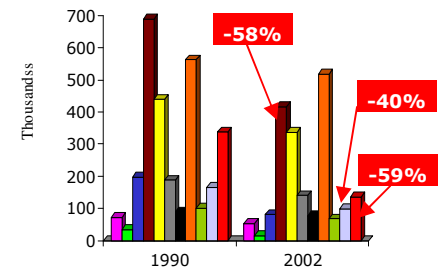
Country	1990			2002		
	GRT/ Vessel	KW/ Vessel	KW/ GRT	GRT/ Vessel	KW/ Vessel	KW/ GRT
DE	8,6	50,8	5,9	3,0	24,8	8,0
BE	17,0	138,0	8,1	15,0	426,5	28,4
DK	9,7	71,1	7,2	4,6	40,8	8,7
ES	4,2	25,5	6,0	3,1	23,4	7,3
FR	5,6	68,0	12,1	4,2	78,5	18,3
EL	3,1	24,4	7,8	2,4	22,1	9,0
IE	7,5	43,7	5,7	4,5	34,4	7,5
IT	5,7	52,5	9,1	4,2	47,6	11,2
NL	11,3	57,1	5,0	6,0	50,2	8,2
PT	2,2	9,1	4,1	1,9	17,0	8,8
UK	5,7	57,7	10,1	4,5	57,9	12,7

Country	1990			2002		
	GRT/ Vessel	KW/ Vessel	KW/ GRT	GRT/ Vessel	KW/ Vessel	KW/ GRT
DE	56,1	197,4	3,5	49,5	196,6	3,9
BE	76,2	234,2	3,0	81,4	225,1	2,7
DK	62,4	271,1	4,3	54,8	219,7	4,0
ES	68,2	255,3	3,7	64,2	217,9	3,3
FR	52,7	303,4	5,7	71,4	305,1	4,2
EL	57,9	245,3	4,2	62,7	239,1	3,8
IE	55,4	219,1	3,9	73,3	258,5	3,5
IT	56,0	249,4	4,4	59,5	266,0	4,4
NL	66,2	211,1	3,2	66,4	215,8	3,2
PT	55,2	225,6	4,0	63,2	247,4	3,9
UK	50,9	274,4	6,0	67,8	169,0	2,4

Inshore fleet (Power)



Coastal Fleet (Power)

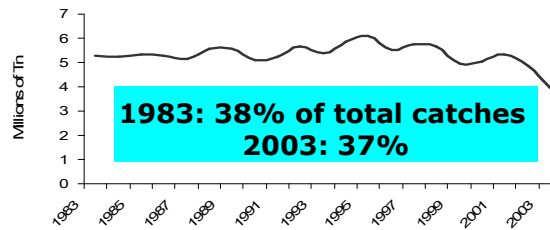




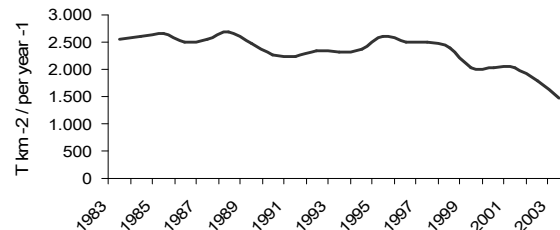
Factors undermining reduction fishing effort

- Inappropriate reduction objectives
- "Fish race" of member States
- Commission acquiescence
- North Atlantic subsidies
- Passive control of transfer capacity between EU countries

EU fisheries fleet catches in EU EEZ



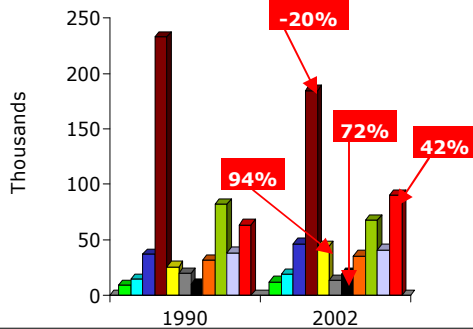
Primary production for EU catches in community waters



Catches and primary production in community waters are declining

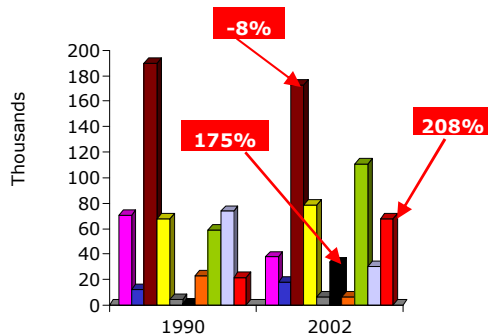
Deep Sea fleet (Tonnage)

Evolution in %



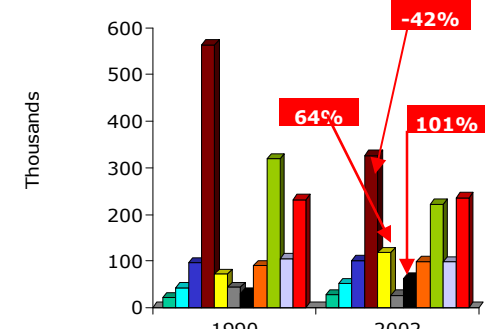
Germany Belgium Denmark Spain
France Greece Ireland Italy
Netherlands Portugal U.Kingdom

High Sea fleet (Tonnage)



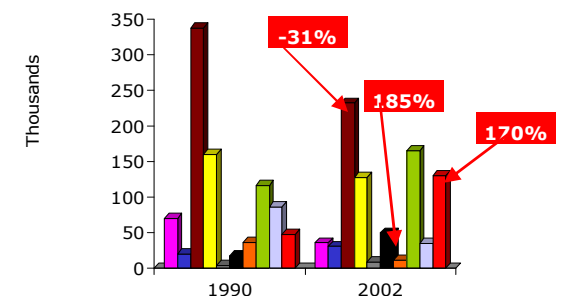
Germany Denmark Spain France
Greece Ireland Italy Netherlands
Portugal U.Kingdom

Deep Sea fleet (Power)



Germany Belgium Denmark Spain
France Greece Ireland Italy
Netherlands Portugal U.Kingdom

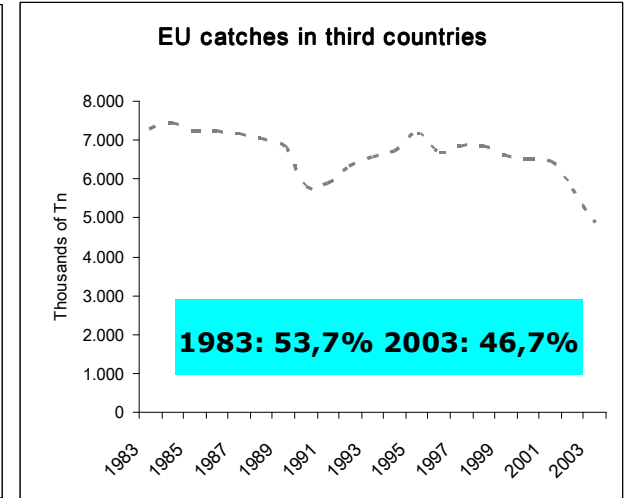
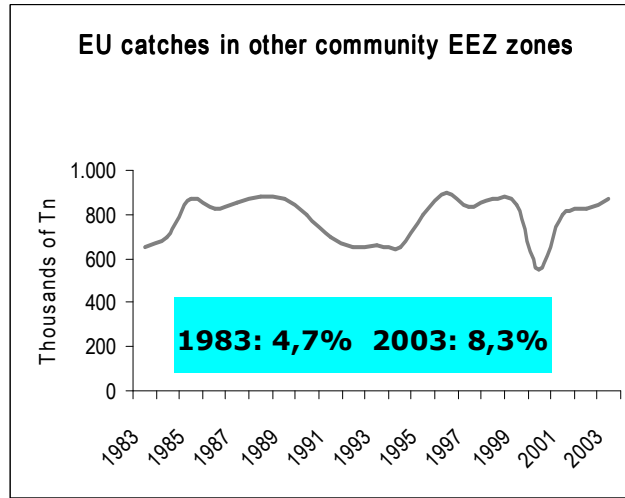
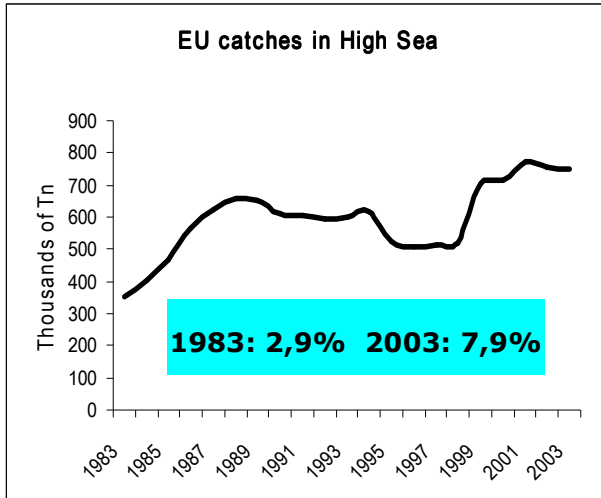
High Sea Fleet (Power)



Germany Denmark Spain France
Greece Ireland Italy Netherlands
Portugal U.Kingdom



...and fishing effort in High sea and other EU EEZs is increasing



- To introduce new capacity with community aid capacity from 2003 to 2004 it should be permanently withdrawn without aid
 - (i) 1 Gross Tonne (GT) withdrawn for 1 GT introduced, for vessels up to 100 GT
 - (ii) 1.35 GT withdrawn for 1 GT introduced, for vessels between 100 and 400 GT.
- Subsidies until 2004 for vessels under 400 GT. After that it will be possible receive aid only for safety and working conditions on board.

Country	Tonnage 2002	Reference levels 2003	Tonnage 2004	Power 2002	Reference levels 2003	Power 12-31-2004
DE	67.113	84.262	65.959	158.244	175.927	160.225
BE	24.194	132.706	23.794	66.863	66.863	66.732
DK	101.081	783.113	97.138	363.202	459.526	323.975
ES	527.268	23.203	498.988	1.266.236	1.793.251	1.210.106
FL	19.736	259.838	19.352	191.233	216.195	187.605
FR	228.065	119.910	228.006	1.096.469	1.164.805	1.109.040
EL	109.303	86.981	97.646	634.921	653.497	568.991
IR	68.189	229.862	81.222	193.153	230.226	226.389
IT	217.960	213.139	217.493	1.312.797	1.338.971	1.294.303
NL	180.063	194.756	200.497	418.945	527.067	470.202
PT	116.968	286.120	119.140	403.245	492.844	407.001
UK	242.707	51.993	229.608	914.158	1.129.194	889.635
SW	46.982	132.706	44.869	231.286	261.028	225.761

Source: Council Regulation (CE) No 1438/2003, Community Register Fleet.