

State of the Fish Stocks and the Economics of Fishing Fleets

Tuesday 26th of September 2017, Brussels

Broadcast of the event [here](#).

About the event

The Directorate General for Maritime Affairs and Fisheries of the European Commission (DG MARE) organised its annual Scientific Seminar on the status of European fish stocks, fisheries management systems and the economic performance of the EU fishing fleet.

Presentations covered the state of the fish stocks in the Mediterranean Sea, the Black Sea, the North-East Atlantic and the Baltic Sea, the economic performance of the EU fishing fleet, as well as a comparison between the EU and the US fisheries management systems. Presentations were made by senior experts in fisheries biology from **DG MARE**, **ICES** and **STECF**, among others.

The sessions were chaired by Mrs **Hélène Clark**, EC, DG MARE, Director for Fisheries Policy Atlantic, North Sea, Baltic and Outermost Regions.

Welcome

The meeting was opened by Mr **João Aguiar Machado**, DG MARE Director General who reminded of the importance of implementing the reformed CFP, beat rather than meet the MSY deadline of 2020, sticking to our science-based policy and continue to improve our knowledge. MSY is important in many ways; ecologically, socially and economically, and it is essential to keep EU fishing industry at sea. He underlined that the EC's commitment to scientific and economic advices is strong.

He drew up a brief overview of the status of the fish stocks, expressing that the overall picture is positive, with fish mortality decreasing, the number of stocks at MSY increasing, an economic forecast upbeat, ... and presented the state of play of the Multi-annual Plans in EU. But he also stressed that the Mediterranean and Black Sea are heavily overfished, drawing attention to the [MedFish4Ever Declaration](#) as well as the [Bucharest Declaration](#). He stressed the importance for the MS from the Mediterranean and Black Sea to turn their commitments into actions.

Presentations

1. Comparison of EU and US fisheries management systems

Ernesto Penas Lado, DG MARE Principal Adviser, gave a presentation comparing the EU and US fisheries management systems. He explained that such a comparison is needed to put the CFP and its performance into perspective, and that the US positive and negative experience is a useful example. The choice of the comparison to the US can be explained by the share of complexity largely comparable to the CFP. He pointed out the many elements in common and the important differences between the CFP and the US fishery Management, highlighting that the US system is

more of a flexible management regime that contains a range of management options that takes into account and allows for variation, while the EU system is, for example in the case of the Baltic Sea MAP, requires amendments to biomass thresholds, adopted by co-decision by Council and Parliament.

The following table summarises the comparison made between both fisheries management:

	EU	US
<i>Incorporating uncertainty in policy</i>	<i>Low</i>	<i>High</i>
<i>Scientific evaluation</i>	<i>2/3 (Atlantic/Baltic)</i>	<i>90% main stocks More money spent in marine research</i>
<i>F objective</i>	<i>F_{MSY} target or limit?</i>	<i>F_{MSY} limit (flexible)</i>
<i>B objective</i>	<i>Aspirational 'above B_{MSY}'</i>	<i>Above ½ B_{MSY}</i>
<i>Recreational fishing</i>	<i>Not included</i>	<i>Included</i>
<i>Overfishing reduction</i>	<i>Recent, partial</i>	<i>Longer, more complete; Distinction made between overfishing and overfished stock</i>
<i>TAC consumption</i>	<i>Relatively high but slight decrease over the past years</i>	<i>Low</i>
<i>Discard objective</i>	<i>Fixed across the board</i>	<i>Flexible</i>
<i>Discard reduction</i>	<i>?</i>	<i>Extremely variable</i>
<i>Impact of Advisory Councils</i>	<i>Low</i>	<i>High</i>

Questions and discussion

- **University of Iceland** wondered what the economic outcomes of those 2 fisheries management systems are, highlighting that the purpose of fisheries is economic. **Ernesto Penas Lado** referred to NOAA's [website](#) which publishes such annual reports.
- **The Scottish White Fish Producers Association** asked for more explanation on the difference between the impact of ACs from the EU and the US. **Ernesto Penas Lado** explained that the main factor explaining this difference resides in the fact that the scope of the ACs in US is much wider which leads them to have a higher impact on policy issues.
- **The Mediterranean Advisory Council** wondered why US has already data on the biological status of the stock for 2016, while such data usually takes 2 years to be available in EU. **Ernesto Penas Lado** indicated that in the US such analysis are not centralised as it is in EU. US's ACs all have a scientific and statistical council. He referred to the following presentations "Biological status and developments of the main stocks" for more information on data availability.

2. Economic performance of the EU fishing fleet

Michael Keatinge, STECF, Chair of the STECF WG on Economics, gave a comprehensive overview of the latest information available on the structure and economic performance of EU MS fishing fleets, referring to [The 2017 Annual Economic Report on the EU Fishing Fleet](#). His presentation summaries the main findings regarding fishing capacity, effort, employment, landings, income, costs, projected values for 2016, and forecast estimates for 2017.

The following table summarises the assessment made for 2016-2017:

	2016	2017
Landed weight	- 3.4%	+ 1%
Landed value	+ 3.6%	Unchanged
Operating costs	- 4.8%	+ 1%
Capital costs	- 2.5%	- 2%
GVA to revenue	+ 11%	- 3%
Gross profit	+ 27%	- 7%
Net profit	+ 61%	- 5%

Questions and discussion

- **The Baltic Sea Advisory Council** stressed the lack of “intermediary” fishing fleet in the report, which only separates vessels into “small” or “large” categories.
- **VisNES/EAPO**, regarding the wages, stressed the importance of recognising that the net earnings of employees are different than the ones of self-employed (taking care of pensions, sickness ...).
- **The North Western Water Advisory Council** wondered what basis was used for the forecast of 2016-2017. **Michael Keatinge** explained that the estimates were made based on data that is already known, i.e. TACs allocation, the fuel price and many main drivers.
- **The Pelagic Advisory Council** raised the point of depreciation, and wondered how the STECF handles that, as it is a massive issue, particularly on the pelagic fisheries. **Michael Keatinge** recognised that the difference between growth and net is to be taken into account for depreciation.
- **The North Sea Advisory Council** wondered whether the presentation would make more sense by separating it into North and South regions. This would give a totally different picture. **Michael Keatinge** agreed but underlined that the full report does do so.

3. Long-term trends with respect to Maximum Sustainable Yield (MSY)

Ernesto Jardim, JRC, Senior Fisheries Scientist, presented a series of graphs showing the evolution (from 2003 to 2015) of the number of stocks where fishing mortality rates are above and below the reference fishing mortality, the number of stocks outside safe biological limits (SBL), the number of stocks outside the CFP requirements, and the annual value of F/F_{MSY} and of SSB.

STECF comments were:

- *On the stock status:*
 - *Many stocks are still overexploited in the North East Atlantic (NEA) but stocks status is significantly improving:*
 - *The proportion of overexploited stocks decreased from more than 70% to close to 40%*
 - *The proportion of stocks outside the SBL follows the same decreasing trend, from 65% in 2003 to 38% in 2015*
 - *The proportion of stocks outside the CFP requirements decreased from almost 90% to 60%*
 - *These indicators were not computed for the Mediterranean due to data limitations*
- *On the trends in fishing pressure:*
 - *In 2000s, the median fishing mortality in the NEA was 1.5 time larger than F_{MSY} and has now stabilised around 1.0 (half of the stocks have reached F_{MSY}). However, F has not decreased since 2011.*
 - *In the Mediterranean Sea and Black Sea, F remained at a very high level during the whole 2003-2014 period, with no decreasing trend, around 2-3 times larger than F_{MSY} .*
- *On the trends in biomass:*
 - *Improvement in the ICES area:*
 - *SSB in 2015 was around 35% higher than in 2003*
 - *A less pronounced but still improving trend is also observed for data poor stocks (ICES category 3)*
 - *No improvement in the Mediterranean and Black Sea*
 - *SSB decreased about 25% over the period*

STECF conclusions were:

- *2017 results confirm a reduction in the overall exploitation rate for the ICES area*
- *On average, the stock biomass is increasing and stock status is improving*
- *Nevertheless, progress achieved until 2015 seems too slow to ensure that all stocks will be rebuilt and managed according to F_{MSY} by 2020*
- *Stocks in the Mediterranean and Black Sea remain in a very poor situation; F has remained high and SSB shows a declining trend over the entire period examined.*

4. Biological status and developments of the main stocks

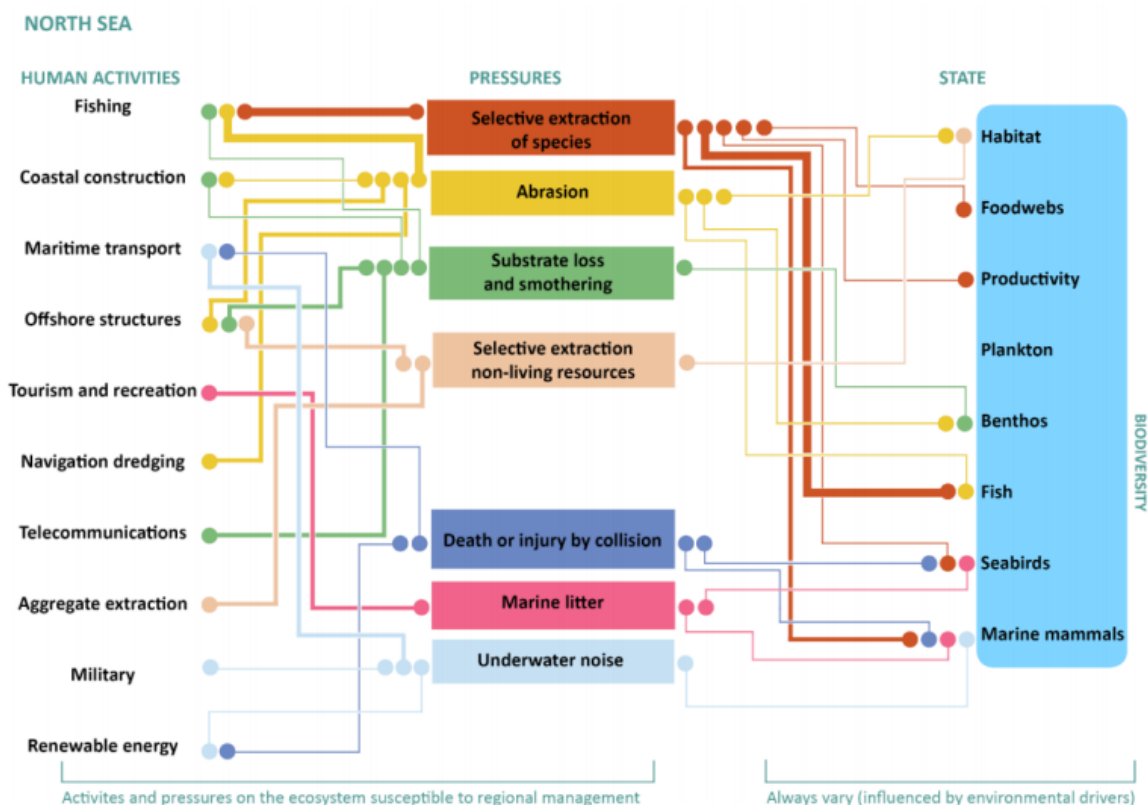
A. Northeast Atlantic, Baltic Sea and North Sea stocks

Eskild Kirkegaard, ICES Advisory Committee Chair, started by presenting the developments and general trends in the stock size and exploitation using MSY trigger as an indicator focusing on:

- *hake, four-spot megrim and sardine for the Bay of Biscay ecoregion;*
- *cod west of Scotland, herring Irish sea, Celtic sea and southwest of Ireland, and sole Bristol Channel and Celtic Sea for the Celtic Seas ecoregion;*
- *cod, plaice and herring for the North Sea, Skagerrak and Kattegat ecoregion;*
- *sprat for the Baltic Sea ecoregion.*

He then explained the causes for changes in stock size such asg. reduced fishing mortality and evolution of the age composition of stocks. He went on by introducing the ecosystem impacts of those stock sizes changes such as the changes in the special distribution of the stocks.

Finally, he announced that ICES will from now on give ICES fisheries overviews by ecoregion which will include information on fishing effort, landings, spatial distribution, species interaction, swept area, and temporal trends in F and SSB... as well as ICES ecosystem overviews where fisheries will be put in their ecosystem contexts and how each factors (management politics, social and use, chlorophyll, benthic habitats ...) impact each other. Here under is the example of the North Sea:



B. Mediterranean Sea stocks

Clara Ulrich, STECF Chair, presented an overview of STECF's work on the state of the stocks in the Mediterranean Sea. She referred to the analytical assessments of the Commission staff working [document](#) on the State of Play of the CFP and Consultation on the Fishing Opportunities for 2018. She also presented the recent work of STECF on data poor stocks.

Her take-home messages were:

- *There is a continuous improvement in the scientific work:*
 - *Increasing number of stocks with some assessment, increasing coordination between GFCM/DG MARE/STECF, increasing transparency/availability of assessment results*
 - *Robust methodological developments*
 - *Investigations of data-poor assessments*
 - *Revisions of reference points*
- *A global ecological picture still very pessimistic:*
 - *No observed decreased in catches overall*
 - *Average biomass still decreasing*
 - *Average fishing mortality still increasing*
- *How many times F is above F_{MSY} can though remain imprecise, not (only) because of uncertain data but because biomass is low ($F \sim C/B$)*
- *Reducing fishing mortality means reducing catches of adult fish:*
 - *Every catch counts!*
 - *Any measure that only reduces/displaces the fishing effort without also ensuring of total catches will not contribute to achieving the CFP objectives*
 - *Protecting juveniles is not enough... protection of the adults is a priority*

Questions and discussion

- ***Oceana** asked what are the plans of the EC and the MS to fix the situation in the Mediterranean Sea. Regarding the Atlantic, Oceana stated that we need to focus on the trends on the short-term, especially since the reformed CFP. They wondered what are the intentions of the EC to commit to the reformed CFP and to meet MSY in 2020. **Veronica Veits** (EC, DG MARE, Director Fisheries Policy Mediterranean and Black Sea) stressed the importance of getting/delivering the commitments made during the MedFish4Ever Declaration, along with working on other measures such as regional plan for action to address IUU fishing, more controls ... She highlighted that we can only succeed if all MS work together and support those measures. We also need to convince MS of the implementation of TACs and quotas. **Hélène Clark** added that the EC is fully committed to the objectives of the CFP and is using all the tools available to promote these objectives, starting with the TACs setting, developing MAPs, and reviewing the Technical Measures Regulation.*
- ***The Pew Charitable Trusts** indicated that B_{MSY} had not been used as an indicator, and asked what work was done to use better biomass indicators/proxies than B_{pa} and MSY $B_{trigger}$, in order to allow reporting on the progress the biomass objective of the CFP.*

STECF replied that it is trying to use B_{MSY} but it is traditionally not computed in EU, this means that they lack values to allow them to compute this indicator. *ICES* explained the difference between B_{MSY} and MSY Btrigger and underlined that they feel they do have an appropriate indicator now.

- **The Baltic Sea Advisory Council** stressed the need to take into consideration the economic activity part of fisheries, and not only the nature part. Asked if it is always good to end up fishing below on average F_{MSY} , which would for him be in contradiction with the CFP – we should fish at F_{MSY} otherwise we do not deliver.
- **Europêche** asked what the role of the fishing sector, the EC, independent experts etc is when setting TACs not according to scientific advices. *Europêche* also asked what if we were to apply B_{MSY} . **Hélène Clark** underlined that setting TACs is a science-based process but we need to take into consideration the socio-economic impacts, which is a delicate balance to try to make. **Ernesto Penas Lado** added that science is there to inform on the situation and the consequences of taking different options. It helps policy makers to be well informed. However, he stressed that there is not one magic figure to be set. The objective is F_{MSY} by 2020, that is very clear, but the rhythm we want to take to reach this objective can depend. Regarding using B_{MSY} , he expressed that we are not there yet. If we apply this criterion then we will find out that there is a big time gap between the evolution of the fishing mortality, which is very well described, and the evolution of the spawning stock biomass.
- **Seas at Risk**, underlining that we only have 3 years to go to meet the MSY objective, asked how the EC envisage improving this situation together with the MS and the Councils. *Seas at Risk* also asked why 2003 was used as a baseline and not 2014. **Eskild Kirkegaard** reported we need to consider that we do not have an MSY advice for all stocks, however *ICES* hopes to provide advices for many of the data-limited stocks next year.

Concluding remarks

Mr Karmenu Vella, European Commissioner for Environment, Maritime Affairs and Fisheries, concluded by reiterating the take-home messages given by Mr João Aguiar Machado, i.e. that a good and steady progress has been made, we have come a long way, many stocks in the NEA have been rebuilt, and we have made progress in the development of MAPs. However, all of this is the result of hard but necessary decisions made in the past. Areas of concerns remain the Mediterranean and Black Sea. He stressed that we need to look at the Mediterranean Sea with a fresh look, we need to consider low and high impact fishing, we cannot continue pointing out North African countries, and EU MS need to understand that less commitment (i.e. commit to TACs and quotas) does not mean more profit. He added that, on top of overexploiting our seas, we still have to import 60% of our fish products, and this is how critical we have to be.

Jessica Demblon