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Ref: BSAC/2023-2024/32

Copenhagen, Monday 20th November 2023

**Subject: BSAC recommendations on the STECF 2023 Annual Economic Fleet Report**

**Dear Frangiscos Nikolian,**

The Baltic Sea Advisory Council (BSAC) is glad to provide the Scientific, Technical and Economic Committee for Fisheries (STECF) with its recommendations on STECF's 2023 Annual Economic Report on the EU Fishing Fleet (hereafter the AER)<sup>1</sup>. The AER provides a comprehensive overview of the latest information available on the structure and economic performance of the EU Member States fishing fleets.

On 26<sup>th</sup> October 2023, Mr. Raul Prellezo, STECF Chair of the 2023 AER presented this year's report to the BSAC Executive Committee.

BSAC members are keenly interested in the social and economic aspects of the Baltic fishing fleets, and the BSAC recognises the importance of the AER to understand the socioeconomic impact of management decisions, and would appreciate if STECF sometime in the future could meet with BSAC to explain more in detail how the data collection programme is undertaken.

The BSAC notes that according to the AER, the Baltic fleets have, as a whole in 2021, seen a decrease of landing volumes and values, number of vessels and crews. The gross profit suffered "a substantial 33% decline from the previous year". The situation for the small-scale coastal fleet was no exception since, collectively, the small-scale fleet "was particularly marked in the Baltic region were collectively the SSCF was already performing at negative gross losses in 2018-19, deteriorating further in 2020. In 2021, although an improvement of the performance was observed, the fleet is still operating at gross losses".

**The BSAC remarks that this negative situation translates into different situations at vessel levels.**

- The BSAC welcomes that, this year, STECF produced a break-even revenue analysis in relation to fuel prices for the main fleet segments of the EU fishing fleet as this analysis highlights the correlation between fuel prices and the fleets' ability to make a profit which is likely to be a major factor also in years to come.

**BSAC recommends that the report for 2024 also includes an analysis estimating how much fish need to be caught by different fleet segments to reach the break-even point,**

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<sup>1</sup> Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2023 Annual Economic Report on the EU Fishing Fleet (STECF 23-07), Prellezo, R., Sabatella, E., Virtanen, J., Tardy Martorell, M. and Guillen, J. editor(s), Publications Office of the European Union, Luxembourg, 2023, doi:10.2760/423534, JRC135182.

taking into account the operational costs, including the fuel costs. These figures should help to assess the profitability of Baltic fisheries and allow decision makers to draw suggestions on how to alleviate some negative economic outcome.

- As the Chair of the 2023 AER recognised, the current unit used to measure the fishing effort is not fully satisfactory, in particular in the case of small-scale fleet (for instance, one day at sea for a small-scale vessel does not equal one fishing day of a larger vessel with a trawl). **The BSAC welcomes that STECF is looking at how to better measure fishing effort and highlights the important of this to better assess the current situation.**
- In order to provide a clearer picture and allow for more accurate comparison across Member States, the **BSAC recommends that profit of fleets should be disaggregated and distinguish between its origin** (from sales or from assets).
- When pertinent data is available, the **BSAC recommends that the AER should take into account all the different commercialisation and marketing channels used when assessing the revenues of each fleet.**
- In order for the AER report to be of use to decision makers, it needs to be broken down to the appropriate scale. **The BSAC therefore recommends the European Commission and STECF to look into the possibilities of obtaining less aggregated data than the current Small Scale Coastal Fleet/Large Scale Fleet division.**

The BSAC hopes that these recommendations can help improve the AER's data and methodology. We recognise that not only STECF but also the European Commission and Member States have to coordinate specifically if this requires to modify the data call.

The difficult economic situation for some fishing segments of the Baltic fishing fleet calls for specific and timelier STECF work on the Baltic to help advise decision makers.

Finally, the BSAC remains available to discuss and provide input to the European Commission and STECF on the AER, in order to ensure proper interpretation of the results presented in the report.

Kind regards,



Jarek Zieliński  
BSAC Executive Committee Chair