



Economic performance of selected European fishing fleets in 2008

the potential economic impact on selected fishing fleets segments of TACs proposed by ACFM and reviewed by SGRST for 2008 (EIAA-model calculations)

Frost, Hans; Calvo, Christina; Thøgersen, Thomas Talund

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**Economic performance of
selected European fishing fleets in 2008**

***The Potential Economic Impact
on Selected Fishing Fleet Segments
of TACs Proposed by ACFM and
reviewed by SGRST for 2008
(EIAA-model calculations)***

FINAL version (21.11.2007)

This report does not necessarily reflect the view of the European Commission and in no way anticipates the Commission's future policy in this area.

Acknowledgement: The model used in this Report has been developed from the original EIAA model set out for the Economic Interpretation of ACFM Advice under FAIR CT97-3541. Most of the data presented has been collected under Data Collection Regulation (DCR) and made available by SGECA (subgroup of Economic Assessment at its assembly in Brussels 23-27. October 2006.

The biological information forms basis for the economic assessment. This information was provided by the SGRST (Subgroup on Reviews of scientific Advice on Stocks) during the assembly in Ispra 22-26 October 2007. These contributions are greatly appreciated.

The calculation in the EIAA model has been headed by Hans Frost from the Institute of Food and Resource Economics (FOI) in Copenhagen assisted by Cristina Calvo from university of VIGO and Thomas Thøgersen from FOI. Angel Calvo has been focal point to the DG-fish. Joint Research Center (JRC) have provided the economic data.

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I. Introduction to the EIAA Report for 2008

Recommendation

The calculations of the economic repercussions of the TAC/quota advice forwarded by the SGRST have this year been performed on a new platform. The TAC/quota advice by SGRST has been provided as previous years, but costs and earnings data and landings composition data required to carry out the assessment has been provided by JRC. It has therefore been investigated to which extent this new platform is operational. The data collected by JRC are placed in a database with specific codes for all the variables according to the DCR (Data Collection Regulation).

The conclusion is that the new platform is operational. The information stored in the database is workable, but some effort has been used to produce the information in a format that is comparable with the TAC/quota advice format and the required input format of the EIAA model. Further data polishing and checks of data quality are required.

It is recommended that in order to comply with the time restriction, attention is given to the fact that substantial effort is needed to produce the required data i.e. that JRC is provided with enough resources to carry out this type of data preparation.

1. The Economic Assessment

This report gives an assessment of the expected economic impact of the TACs proposed by the ACFM for 2008 and reviewed by the SGRST meeting 22-26 October 2007. The costs and earnings information and landings compositions of the pertinent fleet segments were provided by the SGECA at its meeting in Brussels 23-27 October 2006. Later calls for data have improved the data.

The EIAA model used for the calculations is described in the report from 2005 available from http://ec.europa.eu/fisheries/publications/factsheets/legal_texts/sec_2004_1710_en.pdf However, one important change must to be noted: The price flexibility rates have been changed according to those used in the calculations regarding the flatfish management plan. The rates for all species have been increased to 0.3 compared to 0.2, and for sole and plaice the rates are 0.62 and 0.22. Higher flexibility rates imply larger price response to changes in landings.

It is important to emphasize that the model is used to project the economic repercussion of different TAC/quota scenarios. This approach entails that prices and costs, which are independent of the TAC/quotas, are kept unchanged relative to the baseline period given as an average of the three preceding years.

To carry out an assessment of the economic impact of ACFM advice, the fleet segments examined need to be subject to quotas, and knowledge of the catch composition for the national fleet and each fleet segment is also required.

Data Collection Regulation (DCR)

In previous years the costs and earnings information was taken from the Annual Economic Report (AER) [Annual Report 2005 \(final version\)](#) and the database CAClient hosted by LEI <http://www3.lei.wur.nl/ca/>.

This procedure has changed significantly from 2006. Now cost and earnings data as well as landings composition data originates from the DCR¹. Data is now requested from the Member States by Joint Research Centre. The fleet segments are in accordance with the DCR as shown in Table 1. The EIAA model can work with these segments without problems.

According to the Appendix XVII of the DCR, the vessel segmentation that has to be adhered to comprises two dimensions for the collection of the economic data. Firstly, a dimension taking into account vessel length and, secondly, a dimension separating vessels in terms of gear used (with a higher desegregation for the extended programme than for the minimum programme), see Table 1. The difference between the minimum and the extended programme is that level 4 in Table 1 is omitted in the minimum programme, and the four length groups below 24 metres at level 1 are aggregated to two, leaving only four length groups in the minimum programme.

¹ Commission Regulation (EC) no 1639/2001, OJ L222, 17.8.2001, p. 53

Table 1. Detailed desegregation of vessels (Extended Programme)

Vessel length (level 1)			< 10 m	10 - 12 m	12 - 18 m	18 - 24 m	24 - 40 m	≥ 40 m	
Type of fishing technique									
Level 2	Level 3	Level 4							
Mobile gears	Beam trawl	North Sea < 221 kW							
		North Sea ≥ 221 kW							
		Outside North Sea							
	Demersal trawl and demersal seine	Bottom trawl							
		Danish and Scottish seiners							
		Polyvalent							
	Pelagic trawl and seiners	Pelagic trawl							
		Pelagic seiner and purse							
		Polyvalent							
	Dredges								
Polyvalent mobile gears									
Passive gears	Gears using hooks	Longlines							
		Other gears using hooks							
	Drift nets and fixed nets								
	Pots and traps								
	Polyvalent passive gears								
	Polyvalent gears								

Source: Commission Regulation (EC) no 1639/2001 Appendix IV (section C)

The extended programme allows for 6 segments according to length and 17*6 segments per country if all types of fishing techniques are included. In principle even more segments are possible, if Appendix X in the DCR forms basis. In the minimum programme, a full categorization allows for 10*4 segments per country.

Data considerations

As the process finds itself in a transition period with respect to changing data sources, only four or less segments have been included for each Member State, namely the segments with the highest value of landings. Further necessary information in terms of TAC/quotas, landings composition per segment, and costs and earnings has to be available. Data for 2006 has not yet been requested and the calculations are therefore based on a 2003-2005 baseline period. The EIAA model normally uses a three year average as input for the calculations in order to even out fluctuations. For many countries, the above necessary information is only available for 2005. The calculations are therefore carried out based on data from 2005, if no further information exists. This is done to secure that a wide spectrum of countries can be analysed. For each country the most important segments in terms of landings value has been included, as far as data allow. The countries containing a limited baseline period include Estonia, France, Germany, Ireland and Poland. An overview of all the countries and segments included in the report can be seen in Table 2.

Table 2. Segments distributed on the desegregation of vessels (Minimum Programme)

Vessel length (level 1)	< 12 m		12 - 24 m									
Country	LT	SW	DK	FI	FR	GE	IR	NL	PO	SP	SW	UK
Type of fishing technique												
Level 2	Level 3											
Mobile gears												
Beam trawl												
Demersal trawl and seine												
Pelagic trawl and seine												
Dredges												
Polyvalent mobile gears												
Passive gears	1	1										
Hooks												
Drift and fixed nets												
Pots and traps												
Polyvalent passive gears												
Polyvalent gears												

Vessel length (level 1)	24 - 40 m										≥ 40 m				
Country	DK	FI	FR	GE	IR	LT	NL	PO	SP	SW	UK	DK	NL	SW	
Type of fishing technique															
Level 2	Level 3														
Mobile gears															
Beam trawl															
Demersal trawl and seine															
Pelagic trawl and seine															
Dredges															
Polyvalent mobile gears															
Passive gears															
Hooks															
Drift and fixed nets															
Pots and traps															
Polyvalent passive gears															
Polyvalent gears															

Source: Commission Regulation (EC) no 1639/2001 Appendix III (section C)

Last year (October 2006), six countries were included in the report. This report includes more countries and more segments. In general, the data have not improved substantially for the fleet segments not included last year. However, it has been found relevant to investigate to which extent it was possible to include more segments within the relative short period i.e. two weeks available for the group to carry out the work in time for the STECF plenary meeting. The data collection process has changed in accordance to the implementation of the DCR, and therefore the work this

year included an investigation of whether the new data formats could be used in the EIAA calculations. The conclusion is that it is possible to work on the new platform but further elaboration and experience with the data processing including relevant adjustments of the model is important to gain time.

With respect to the new states admitted as members of the EU from May 2004, in last year's report, one fleet segment was included for Lithuania to test if it was possible to carry out calculations for the new member states subjected to TAC/quotas. However, this model calculation was performed by use of a specially designed version of the EIAA model adapted to Lithuania, as the new member states were not included in the version of the model that was applied for the old member states. This year, six segments are included for the new member states i.e. three for Lithuania and three for Poland. The calculations are performed by using a model similar to the version used for the old member states. Comparing the results obtained by the specially designed model for Lithuania in 2006 and the general EIAA model show no significant differences. However, the quality of the data still needs improvements. The model was also applied to Estonia and Latvia, but it turned out that the required input data was incomplete.

Data Requirements

Apart from the results presented in this report, having in mind that data input can be improved, an important conclusion is that it is possible to perform EIAA calculations by use of the new platform within the limited time available before the STECF plenary meeting. To perform the work properly, the model requires three types of data input:

1. Costs and earnings data per fleet segment
2. Landings compositions per fleet segment
3. Proposed TAC/quotas and preferably spawning stock biomasses

The information collected within item 1 and 2 needs to be consistent and the information collated in 2 and 3 needs to be consistent with respect to species and management areas. This information normally originates from different sources. The data is collected by JRC and is available for a number of fleet segments. However, some data work is still required aiming at producing fully consistent data for item 1 and 2. The procedure of acquiring TAC/quota and spawning stock information from the SGRST has functioned well.

It should be noted that until 2005 data were collated as part of the compilation of the Annual Economic Report (AER) [Annual Report 2005 \(final version\)](#). This information was used in the EIAA reports until 2006. In this connection data checks were performed. From 2006 similar data checks are not performed. Therefore, some uncertainty is associated with the data for the countries not included in last years EIAA report. The countries included last year were: Denmark, Finland, Netherlands, Sweden, United Kingdom, and Lithuania.

2. TAC proposals for 2008.

The group has evaluated the potential economic impact of TAC proposals for 2008 based on the following criteria:

1. Management plans taking into account the provisions for stock recovery agreed by the Council.
2. If no management plans exist, the single species TAC advice has been used. As far as possible, TACs for 2008 were taken directly from the ICES advice for single species exploitation boundaries.

It has been considered to evaluate the economic performance of the ICES mixed fishery advice. The interactions between stocks and fisheries are here taken into consideration, but this will entail many zero quotas. The evaluation is therefore found not to be realistic and it is decided not to evaluate this scenario.

The TAC proposals for 2008 and the agreed quotas for 2005 to 2007 are shown in Table I1. The TACs for the new member states (Lithuania, Estonia, Latvia and Poland) are not included in this table, but shown in Table I2.

3. Long-term TACs and SSBs

Since the long-term equilibrium estimates of TAC and SSB should be largely unaffected from one year to the next, the long-term calculations presented in this report are based on the ICES advice for 2004. Results for long term TACs are not included in this report. However, the SSBs are used in the EIAA model to include the impact of stock abundance on catch per unit effort. Further information can be found in the EIAA report for 2005 [EIAA report](#).

II. Assessment of the Economic Impact of Proposed TACs for 2008 by Fleet Segments

The economic consequences of the management proposal are presented in this chapter. The chapter is organised in the following way.

First, summary results for 2007 and the management plan for 2008 are presented for all the included segments. The selected economic indicator is the operating profit margin defined as net profit relative to value of landings. Theoretically, net profit relative to value of the invested capital would be a more appropriate measure. However, because of uncertainty about estimated value of invested capital, it is concluded that this economic indicator is not useful.

The net profit is defined as value of landings minus all costs. If net profit is negative, operating profit margin is negative. In the summary table, the profit margin for 2007 and the management plan for 2008 is related verbally to the profit margin for 2003-2005 in the following way:

‘Impact’ = Impact of 2007 TAC on operating profit margin compared to 2003-2005

- W ‘Worsened’ = Segment was making losses, losses now greater.
- I ‘Improved’ = Segment was making losses, losses now smaller or even profits.
- L ‘Lower’ = Segment was making profits, profits now lower.
- H ‘Higher’ = Segment was making profits, profits now higher.
- ‘ – ‘ = No significant change.

Second, the TAC proposals for the old and new member states are shown in two tables.

Third, the situation of the included segments of each country is presented in tables and figures, describing the economic results of the management plan relative to the baseline 2003-2005.

The general picture for the selected segments is that they are expected to be performing very poorly in economic terms. There may be some uncertainty related to projections because of the change of data provision procedure compared to earlier years. However, for Denmark, Finland and the Netherlands, data are consistent over time and considered reliable, while data for the other countries may change when further checked. No time has been available to do this.

SUMMARY TABLE

Segment	2007		Management plan 2008	
	Operating Profit Margin	Impact	Operating Profit Margin	Impact
Denmark				
Pelagic Trawl and Seine 12 – 24 m	-22.9%	W	-16.0%	W
Pelagic Trawl and Seine 24 – 40 m	-36.5%	W	-35.1%	W
Pelagic Trawl and Seine ≥ 40 m	-6.1%	L	-8.9%	L
Demersal Trawl and Seine 12 – 24 m	-29.8%	W	-19.8%	W
Finland				
Pelagic Trawl and Seine 12 – 24 m	9.5%	I	3.2%	I
Pelagic Trawl and Seine 24 – 40 m	15.2%	I	9.2%	I
France				
Demersal trawl and seine 12-24 m	1.7%	I	-2.0%	W
Demersal trawl and seine 24-40 m	-0.1%	I	-5.2%	W
Pelagic trawl and seine 12-24 m	-2.2%	L	-3.0%	L
Pelagic trawl and seine 24-40 m	-19.2%	W	-19.3%	W
Germany				
Demersal trawl and seine 12-24 m	-44.6%	W	-24.9%	W
Demersal trawl and seine 24-40 m	37.6%	L	44.5%	H
Beam trawlers 12-24 m	-21.4%	W	-20.5%	W
Ireland				
Demersal trawl and seine 12-24 m	10.9%	H	0.2%	L
Demersal trawl and seine 24-40 m	18.9%	L	11.1%	L
Lithuania				
Passive Gears <12 m	5.0%	L	5.0%	L
Demersal Trawl and Seine 24-40 m	16.9%	L	13.5%	L
Drift and fixed net 24-40 m	23.5%	L	19.6%	L

Netherlands

Beam trawlers 12 – 24 m	-3.4%	L	-1.5%	L
Beam trawlers 24 – 40 m	-19.5%	W	-12.5%	W
Beam trawlers \geq 40 m	-14.1%	L	-6.4%	L
Pelagic Trawl and Seine \geq 40 m	-5.1%	W	-8.3%	L

Poland

Demersal trawl and seine 12-24 m	-22.5%	W	-27.1%	W
Demersal trawl and seine 24-40 m	-67.3%	W	-74.1%	W
Pelagic trawl and seine 24-40 m	-27.3%	I	-27.8%	-

Spain

Demersal trawl and seine 24-40 m	-9.9%	W	-13.4%	W
Pelagic trawl and seine 12-24 m	0.7%	L	-0.3%	L
Pelagic trawl and seine 24-40 m	-0.6%	L	-2.2%	L

Sweden

Passive Gears < 12 m	44.5%	L	51.6%	H
Demersal Trawl and Seine 12 – 24 m	14.0%	L	25.7%	H
Pelagic trawl and seine 24 – 40 m	5.1%	I	10.8%	I
Pelagic trawl and seine \geq 40 m	20.8%	H	26.0%	H

UK

Beam trawlers 24 - 40 m	-51,7	W	-50,1	I
Demersal Trawl and Seine 12 - 24 m	-6,3	I	-8,4	I
Dredgers 12-24 m	-10,1	I	-10,2	-
Pots and Traps 12-24 m	7,7	H	7,6	-

Table I.1. TAC proposals for 2008 for EU (15). Metric tonnes.

	2005 ¹	2006 ²	2007	Management plan 2008
Herring				
I,II	78541	62000	70000	110142
IIIa	82696	70217	59609	71000
IIIbcd (EC zone)	108440	108691	148000	120758
IIIbcd, Management Unit 3 (sub-div. 30-31)	64000	91600	88100	77860
IIa,IVab	305557	315351	242155	124250
IVc,VIIId	74293	50023	37517	19151
Vb,VIaNb	29440	33340	34000	14733
VIa S,VIIbc	14000	15400	13860	13860
VIaClyde	1000	800	800	800
VIIa	4800	4800	4800	4400
VIIef	1000	1000	1000	1000
VIIghjk	13000	11050	9393	9393
Anchovy				
VIII	30000	5000	5000	5000
IX,,X,CECAF	8000	8000	8000	4800
Cod				
I,IIb	19499	18920	15457	14315
IIIa Skagerrak	3773	3207	2759	3556
IIIa Kattegat	1000	850	731	731
IIIbcd (EC zone)	42391	49024	24500	32629
IIa,IV	22659	19260	16564	21353
Vb,VI,XII,XIV	721	613	490	490
VIIa	2150	1828	1462	1462
VIIb-k,VIII,IX,X,CECAF34.1.1	6200	5270	4743	4743
Megrim				
IIa (EU),IV	1740	1740	1479	1740
Vb,VI,XII,XIV	2880	2448	2880	1400
VII	19263	18300	18300	11700
VIIIabde	2237	2125	2125	1300
VIIIc,IX,,X,CECAF	1059	1269	1440	1430
Anglerfish				
IIa (EU zone),IV	10314	10314	11345	11345
Vb,VI,XII,XIV	4686	4686	5155	5155
VII	25082	26456	28080	26800
VIIIabde	6120	6120	7920	6200
VIIIc,IX,,X,CECAF	1955	1955	1955	1955
Haddock				
IIIa,IIIbcd	3610	2935	3219	2900
IIa,IV (EU zone)	52082	44546	46983	34903
Vb,VI,XII,XIV	8302	8407	4615	4200
VII,VIII,IX,X,CECAF34.1.1	11520	11520	11520	10341
VIIa	0	0	1179	1179
Whiting				
IIIa	723	910	1473	1050
IIa,IV (EU zone)	19800	17370	21420	3945
Vb,VI,XII,XIV	1600	1360	1020	1020

TACs (cont.)	2005	2006	2007	Management plan 2008
Whiting (cont.)				
VIIa	514	437	371	371
VIIb-k	21600	18360	19940	10000
VIIIabde	3600	3600	3600	3600
VIIIc,IX,,X,CECAF	816	653	653	653
Hake				
IIIa,IIIbcd	1284	1323	1588	1626
IIa,IV (EU zone)	1496	1541	1850	1895
Vb,VI,VII,XII,XIV	23888	24617	29541	30282
VIIIabde	15932	16419	19701	20197
VIIIc,IX,,X,CECAF	5968	6661	6128	7100
Blue Whiting				
IIa,IV	122024	106313	106313	43842
Vb,VI,VII	474333	222109	222109	91594
VIIIabd	64673	30283	279058	12488
VIIIe	0	0	0	0
VIIIc,IX,,X,CECAF	134227	62852	47442	25919
Nephrops				
IIIa,IIIbcd	4700	5170	5170	4700
IIa,IV (EU zone)	21350	28147	26144	22820
Vb,VI	12700	17675	19885	16275
VII	18596	21498	25133	17450
VIIIab	3100	4030	4320	3600
VIIIc	162	146	146	146
VIIIde	0	0	0	0
IX,,X,CECAF	540	486	437	250
Northern Prawn				
IIIa, IIa,IV	10599	10599	10599	10599
Plaice				
IIIa Skagerrak	7448	7526	8330	7520
IIIa Kattegat	1900	1920	2125	1880
IIIbcd (EU zone)	3201	3201	3201	1203
IIa,IV (EU zone)	57370	55820	49143	49348
Vb,VI,XII,XIV	982	786	786	786
VIIa	1608	1608	1849	5200
VIIbc	160	136	122	40
VIIde	5151	4378	5050	3500
VIIfg	476	405	417	240
VIIhjk	466	396	337	177
VIII,IX,,X,CECAF	448	448	448	448
Pollack				
Vb,VI,XII,XIV	563	450	450	450
VII	17000	13600	15300	15300
VIIIab	1680	1680	1680	1680
VIIIc	328	262	262	262
VIIIId	0	0	1	1
VIIIe	0	0	1	1
IX,,X,CECAF	360	230	288	230

TACs (cont.)	2005	2006	2007	Management plan 2008
Saithe				
Ila,IIIabcd,IV	69947	59160	59160	73500
Vb,VI,XII,XIV	15044	12787	12787	15887
VII,VIII,IX,X,CECAF34.1.1	5574	4738	3790	7350
Mackerel				
Ila (EU),IIIabcd,IV	17067	17621	17445	16211
Ila,Vb,VI,VII,VIIIabde,XII,XIV	217477	225837	256363	207766
VIIIc,IX,,X,CECAF	24873	26176	29611	24081
Sole				
IIIa,IIIbcd	416	900	900	970
II,IV	18320	17470	10800	12800
Vb,VI,XII,XIV	68	68	68	68
VIIa	960	960	816	816
VIIbc	65	64	65	65
VIIId	5700	5720	6220	6590
VIIe	865	940	900	765
VIIIfg	1000	950	893	1000
VIIhjk	650	650	650	300
VIIIab	4140	4060	4540	4170
VIIIcde,IX,,X,CECAF	1216	1216	1216	1216
Sprat				
IIIa	46250	48100	48100	12500
IIIbcd (EC zone)	199541	169791	429300	174299
Ila,IV(part n/a)	257000	263540	147028	195000
VIIde	7680	6144	6145	6144
Horse Mackerel				
Ila(EU),IV(EU)	40616	40957	40983	17280
VI,VII, VIIIabde,XII,XIV,Vb(EU)	133233	135257	135518	178200
VIIIc,IX	44000	55000	550000	25000
X,CECAF	3200	3200	3200	3200
Turbot, brill				
Ila(EU),IV	4550	4323	4323	4323
Lemon Sole, witch				
Ila(EU),IV	6500	6175	6175	6175
Dab, flounder				
Ila(EU),IV	18000	17100	17100	17100
Skates and rays				
Ila(EU),IV	3220	2737	2190	2190
Norway Pout				
Ila,IV(n/a)	86500	86500	86500	49000
Sand eel				
Ila,IV	33668	33668	20000	20000
Salmon				
LIIbcd (EC zone). except sub-division 32 of IBSFC	346918	346918	222028	323337

1. As decided by the Council, Council Regulation (EC) No. 27/2005 of 22. December 2004

2. As decided by the Council, Council Regulation (EC) No. 51/2006 of 20. January 2006

The list of TAC/management areas in the table is not fully complete.

Table I.2. TAC proposals for 2008 for EU (4 - Baltic). Metric tonnes.

	2005 ¹	2006 ²	2007 ³	2008 ⁴
Herring				
IIIbcd (EC zone)	53732	54651	61971	67249
Gulf of Riga	37424	40000	37500	36094
Cod				
I,IIb	1460	1417	1417	-
IIIbcd (EC zone)	21191	24715	22453	16862
Sprat				
IIIbcd (EC zone)	291095	251035	271117	257701
Salmon				
LIIbcd (EC zone)	105923	105923	100705	85836

Note: 4 – Baltic is Estonia, Latvia, Lithuania, and Poland

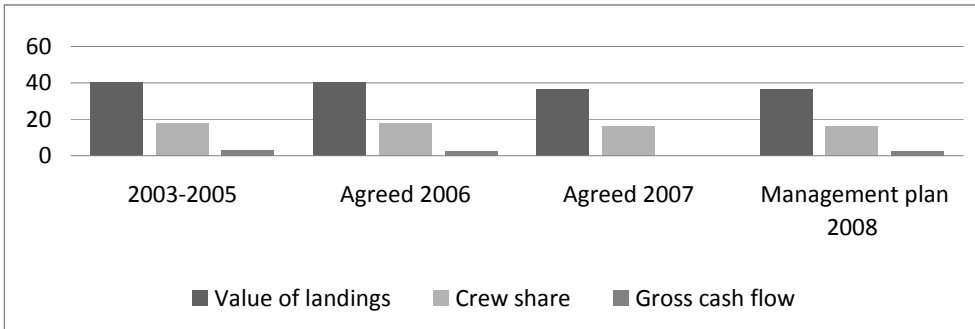
3. As decided by the Council, Council Regulation (EC) No. 27/2005 of 22. December 2004
 4. As decided by the Council, Council Regulation (EC) No. 51/2006 of 20. January 2006
 5. As decided by the Council, Council Regulation (EC) No 1941/2006 of 11. December 2006
 6. Commission proposal 3. September 2007
 - Poland has a small quota of plaice
- Some TAC/management areas are aggregated in the table.

1. Denmark

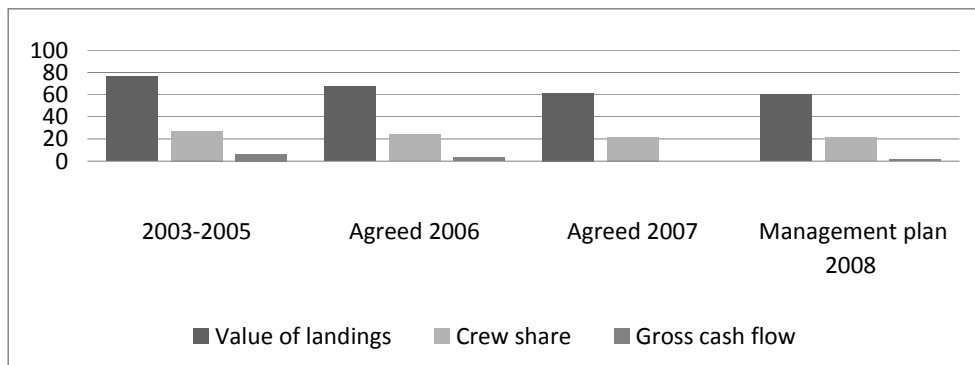
mEuro

	2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Pelagic trawl and seine 12-24 m				
Operating profit margin	-13.3%	-14.3%	-22.9%	-16.0%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	40.2	40.1	36.3	36.7
Crew share	17.8	17.8	16.1	16.2
Gross cash flow	3.0	2.6	0.0	2.5
Net profit	-5.4	-5.7	-8.3	-5.9
Gross value added	20.8	20.4	16.1	18.7
Pelagic trawl and seine 24-40 m				
Operating profit margin	-21.0%	-28.9%	-36.5%	-35.1%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	76.5	67.2	61.3	59.9
Crew share	27.1	23.8	21.7	21.2
Gross cash flow	6.4	3.1	0.1	1.5
Net profit	-16.1	-19.4	-22.4	-21.0
Gross value added	33.6	26.9	21.9	22.7
Pelagic trawl and seine >40 m				
Operating profit margin	4.0%	0.5%	-6.1%	-8.9%
Performance	STABLE	STABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	87.1	80.6	72.4	68.7
Crew share	23.4	21.7	19.5	18.5
Gross cash flow	26.9	23.8	19.0	17.3
Net profit	3.5	0.4	-4.4	-6.1
Gross value added	50.3	45.4	38.5	35.7
Demersal trawl and seine 12-24 m				
Operating profit margin	-16.6%	-17.7%	-29.8%	-19.8%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	58.5	58.4	50.9	52.0
Crew share	31.8	31.7	27.7	28.3
Gross cash flow	0.5	-0.1	-4.9	0.0
Net profit	-9.7	-10.4	-15.2	-10.3
Gross value added	32.3	31.6	22.7	28.2

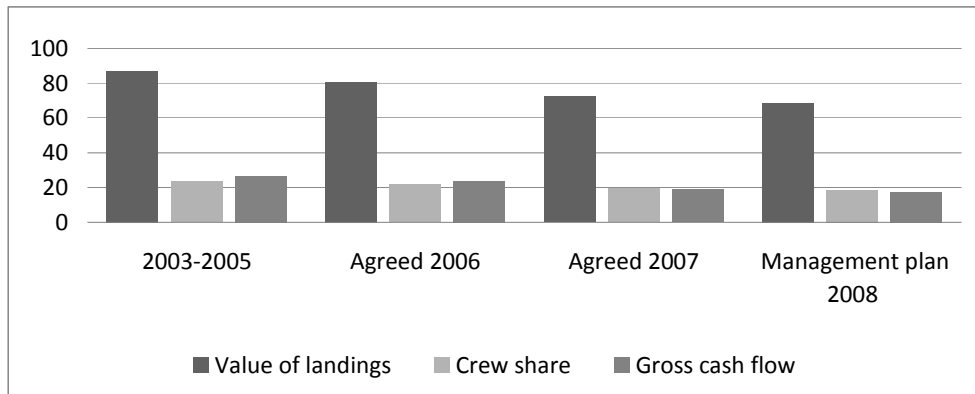
Denmark Pelagic trawl and seine 12-24 m mEuro



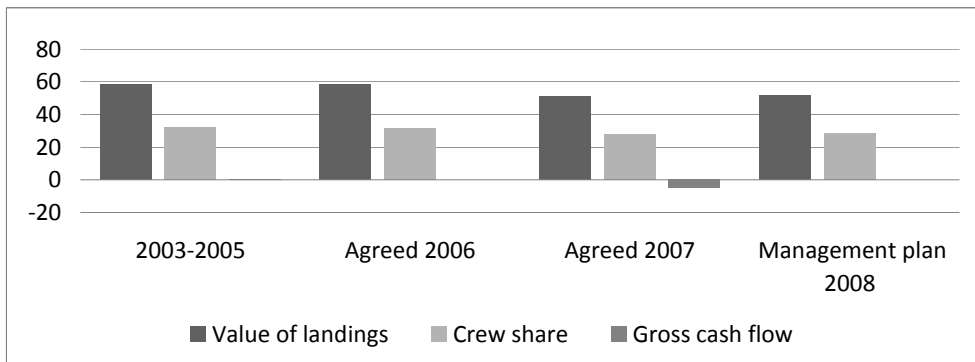
Denmark Pelagic trawl and seine 24-40 m mEuro



Denmark Pelagic trawl and seine >40 m mEuro



Denmark Demersal trawl and seine 12-24 m mEuro

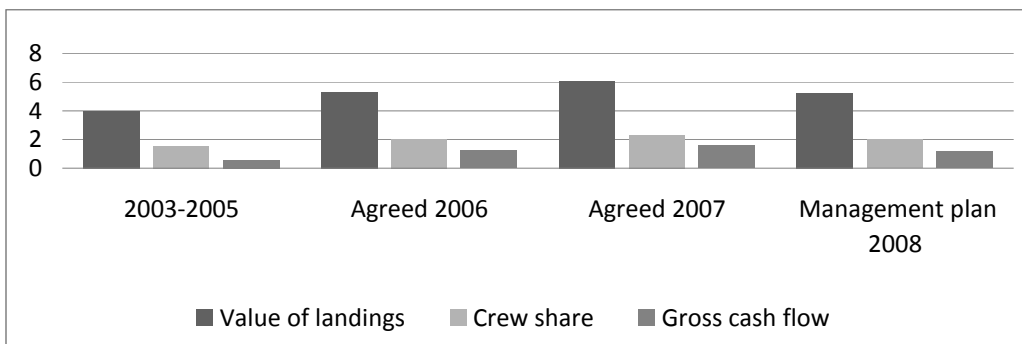


2. Finland

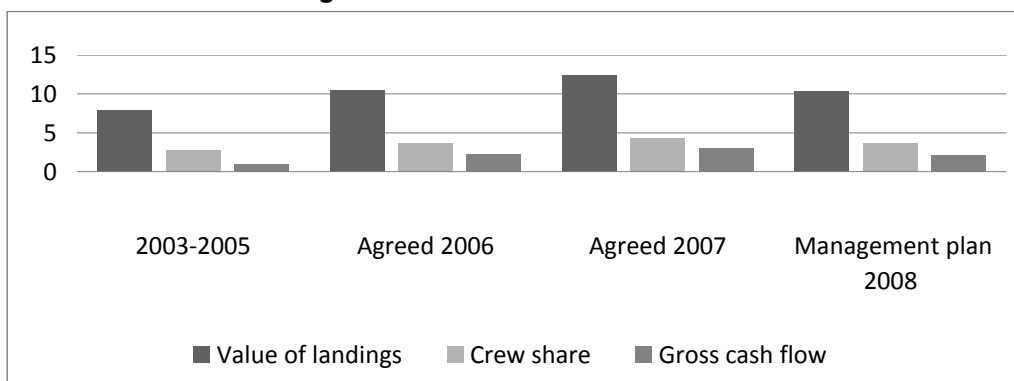
mEuro

	2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Pelagic trawl and seine 12-24 m				
Operating profit margin	-10.8%	4.2%	9.5%	3.2%
Performance	UNPROFITABLE	STABLE	PROFITABLE	STABLE
Value of landings	4.0	5.3	6.1	5.2
Crew share	1.5	2.0	2.3	2.0
Gross cash flow	0.6	1.2	1.6	1.2
Net profit	-0.4	0.2	0.6	0.2
Gross value added	2.1	3.3	3.9	3.2
Pelagic trawl and seine 24-40 m				
Operating profit margin	-2.9%	10.0%	15.2%	9.2%
Performance	STABLE	PROFITABLE	PROFITABLE	PROFITABLE
Value of landings	8.0	10.6	12.4	10.4
Crew share	2.8	3.7	4.3	3.7
Gross cash flow	0.9	2.2	3.1	2.1
Net profit	-0.2	1.1	1.9	1.0
Gross value added	3.7	5.9	7.4	5.8

Finland Pelagic trawl and seine 12-24 m mEuro



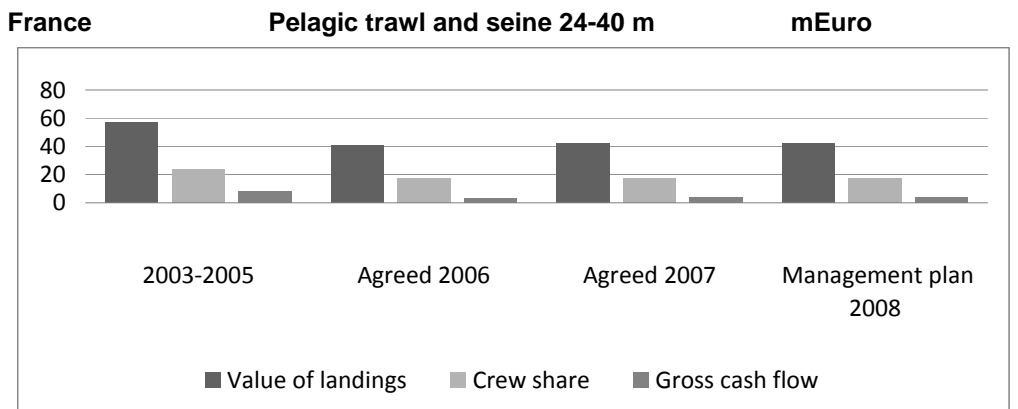
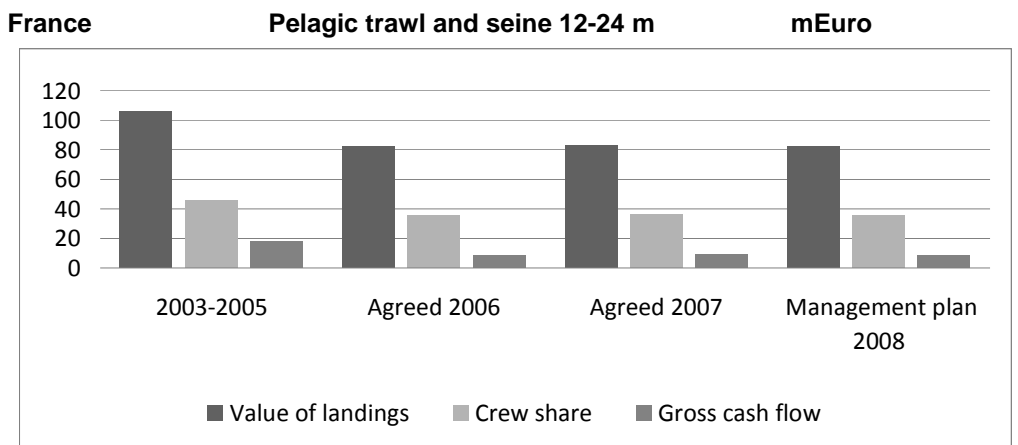
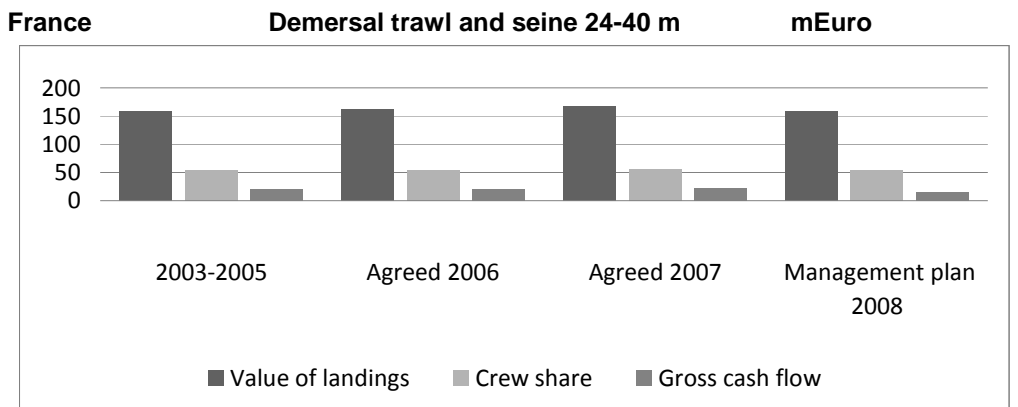
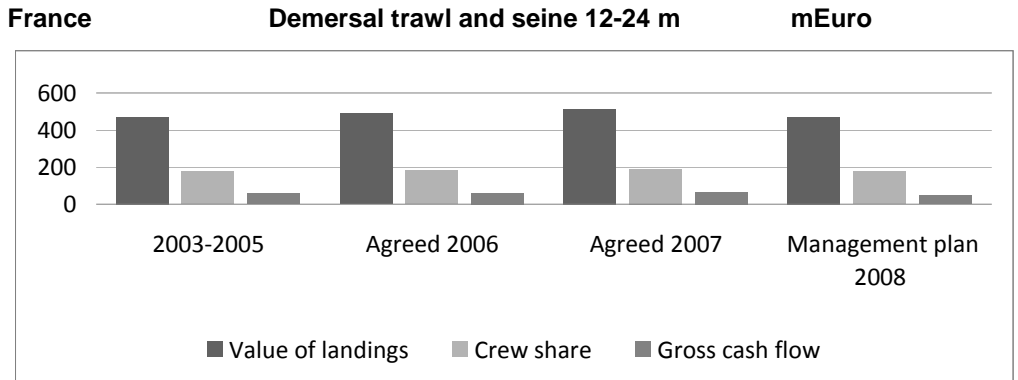
Finland Pelagic trawl and seine 24-40 m mEuro



3. France

mEuro

	2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Demersal trawl and seine 12-24 m				
Operating profit margin	-0.1%	0.5%	1.7%	-2.0%
Performance	STABLE	STABLE	STABLE	STABLE
Value of landings	469.8	489.0	513.6	471.5
Crew share	175.0	182.1	191.3	175.6
Gross cash flow	57.0	60.1	66.4	48.2
Net profit	-0.4	2.7	8.9	-9.3
Gross value added	232.0	242.3	257.7	223.8
Demersal trawl and seine 24-40 m				
Operating profit margin	-1.4%	-1.2%	-0.1%	-5.2%
Performance	STABLE	STABLE	STABLE	UNPROFITABLE
Value of landings	159.5	162.1	168.0	159.2
Crew share	53.3	54.2	56.2	53.2
Gross cash flow	20.4	20.6	22.5	14.3
Net profit	-2.2	-2.0	-0.1	-8.3
Gross value added	73.8	74.9	78.7	67.5
Pelagic trawl and seine 12-24 m				
Operating profit margin	6.8%	-2.7%	-2.2%	-3.0%
Performance	PROFITABLE	STABLE	STABLE	STABLE
Value of landings	106.1	82.6	83.1	82.3
Crew share	45.8	35.6	35.9	35.5
Gross cash flow	18.1	8.7	9.1	8.5
Net profit	7.2	-2.2	-1.9	-2.5
Gross value added	63.9	44.3	44.9	43.9
Pelagic trawl and seine 24-40 m				
Operating profit margin	-6.5%	-21.4%	-19.2%	-19.3%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	57.4	41.1	42.2	42.1
Crew share	23.9	17.1	17.6	17.5
Gross cash flow	8.4	3.4	4.0	4.0
Net profit	-3.7	-8.8	-8.1	-8.1
Gross value added	32.3	20.5	21.6	21.6

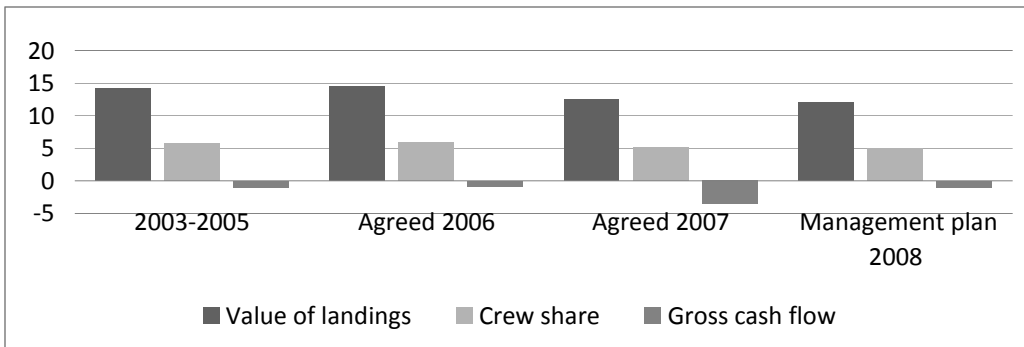


4. Germany

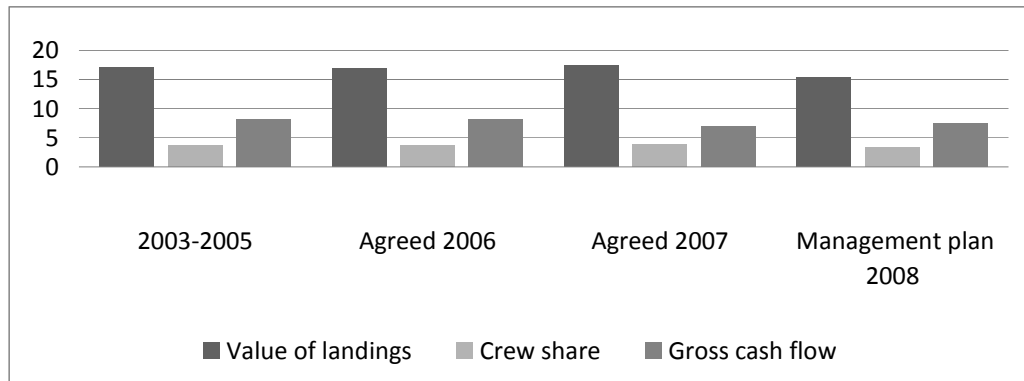
mEuro

	2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Demersal trawl and seine 12-24 m				
Operating profit margin	-21.3%	-20.2%	-44.6%	-24.9%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	14.2	14.4	12.5	12.0
Crew share	5.8	5.9	5.1	4.9
Gross cash flow	-1.0	-0.9	-3.5	-1.0
Net profit	-3.0	-2.9	-5.6	-3.0
Gross value added	4.8	5.0	1.6	4.0
Demersal trawl and seine 24-40 m				
Operating profit margin	44.3%	44.3%	37.6%	44.5%
Performance	PROFITABLE	PROFITABLE	PROFITABLE	PROFITABLE
Value of landings	17.1	17.0	17.4	15.5
Crew share	3.7	3.7	3.8	3.4
Gross cash flow	8.1	8.1	7.1	7.4
Net profit	7.6	7.5	6.5	6.9
Gross value added	11.8	11.8	10.8	10.8
Beam trawlers 12-24 m				
Operating profit margin	-19.2%	-19.9%	-21.4%	-20.5%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	42.3	42.1	40.9	41.1
Crew share	19.5	19.4	18.8	18.9
Gross cash flow	-2.5	-2.7	-3.1	-2.8
Net profit	-8.1	-8.4	-8.8	-8.4
Gross value added	17.0	16.7	15.7	16.1

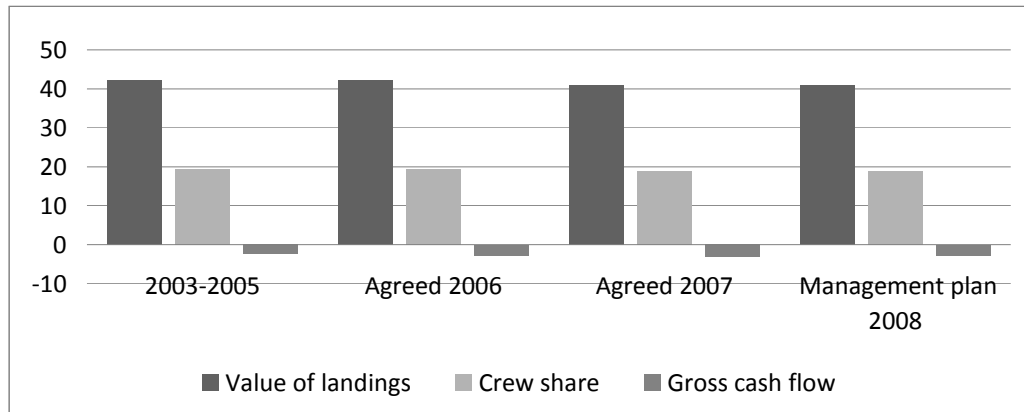
Germany Demersal trawl and seine 12-24 m mEuro



Germany Demersal trawl and seine 24-40 m mEuro



Germany Beam trawlers 12-24 m mEuro

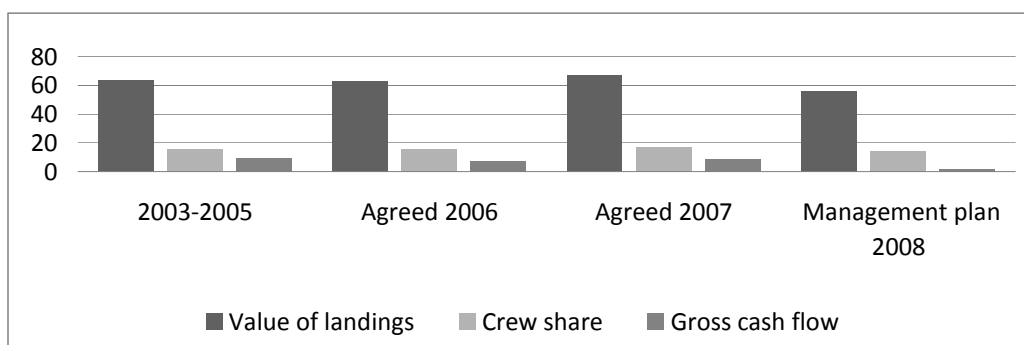


5. Ireland

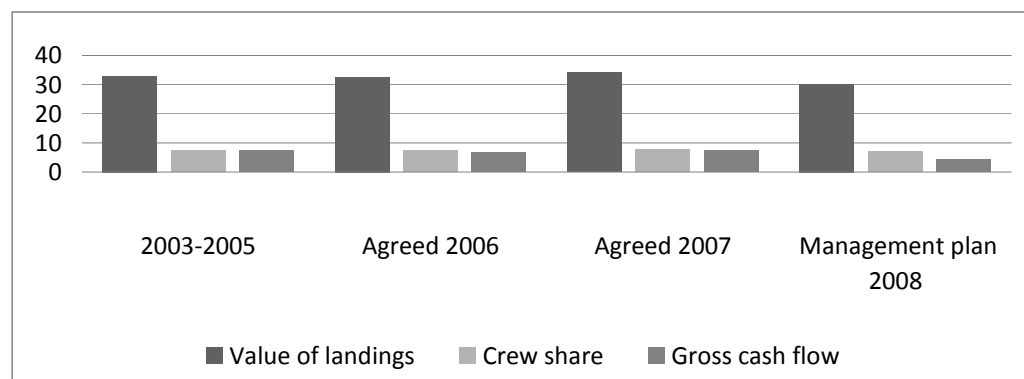
mEuro

	2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Demersal trawl and seine 12-24 m				
Operating profit margin	12.4%	9.3%	10.9%	0.2%
Performance	PROFITABLE	PROFITABLE	PROFITABLE	STABLE
Value of landings	63.5	62.8	66.9	56.1
Crew share	15.8	15.6	16.7	14.0
Gross cash flow	9.4	7.3	8.8	1.6
Net profit	7.9	5.8	7.3	0.1
Gross value added	25.2	22.9	25.4	15.5
Demersal trawl and seine 24-40 m				
Operating profit margin	19.4%	17.6%	18.9%	11.1%
Performance	PROFITABLE	PROFITABLE	PROFITABLE	PROFITABLE
Value of landings	32.9	32.6	34.1	30.2
Crew share	7.5	7.4	7.8	6.9
Gross cash flow	7.3	6.7	7.4	4.3
Net profit	6.4	5.7	6.4	3.3
Gross value added	14.8	14.1	15.2	11.2

Ireland Demersal trawl and seine 12-24 m mEuro



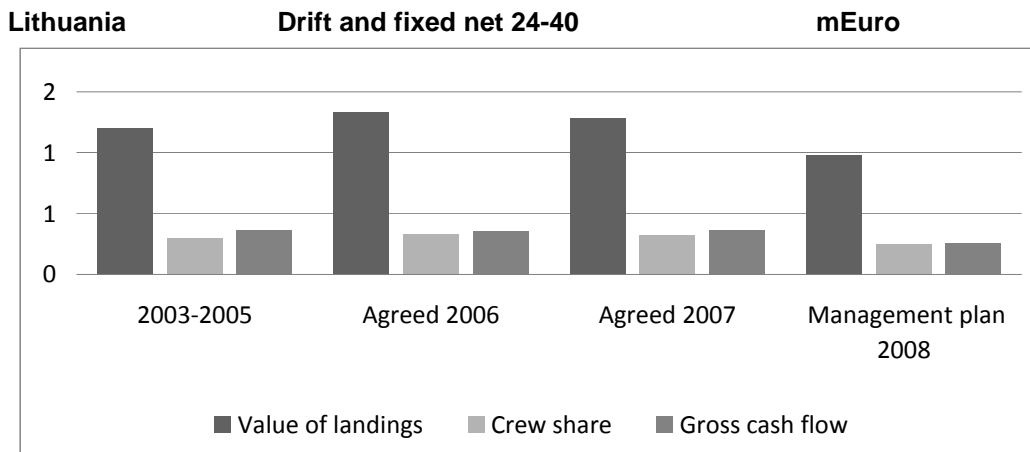
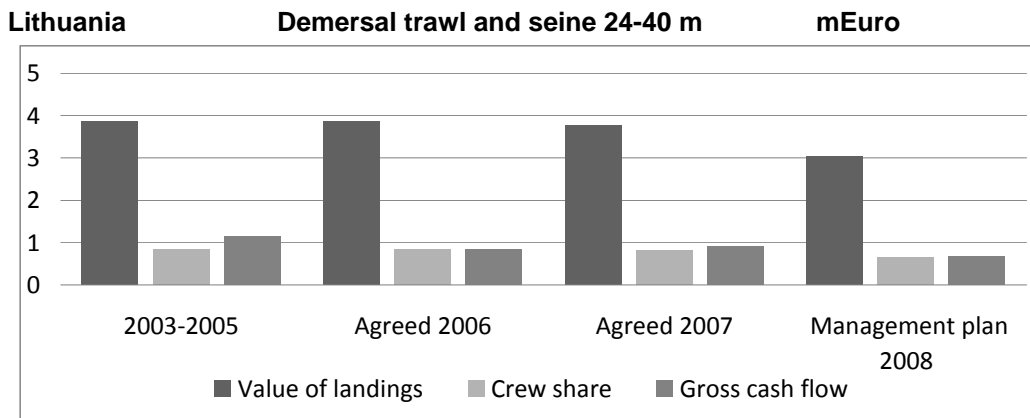
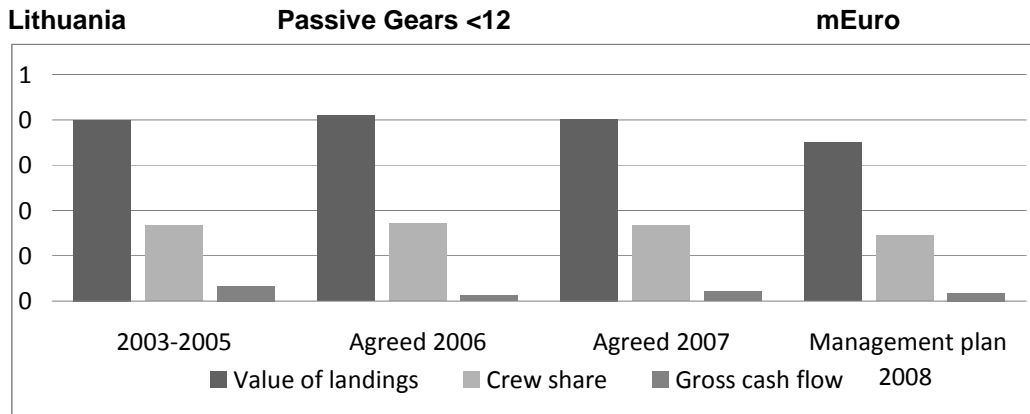
Ireland Demersal trawl and seine 24-40 m mEuro



6. Lithuania

mEuro

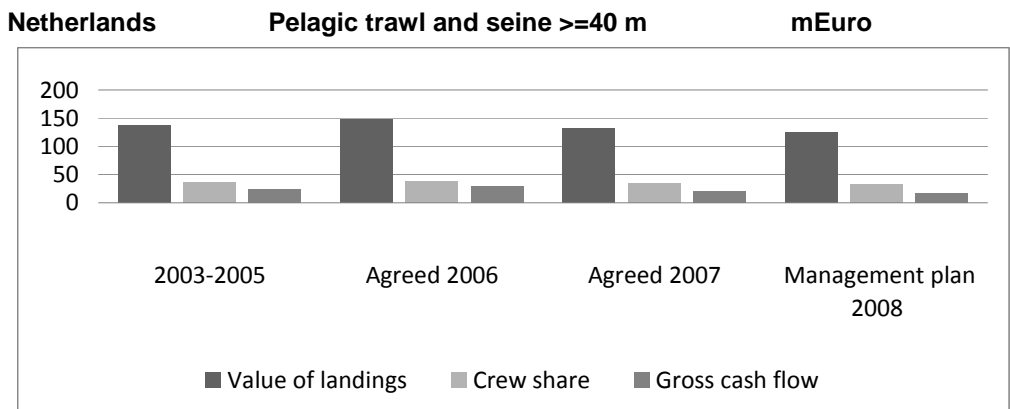
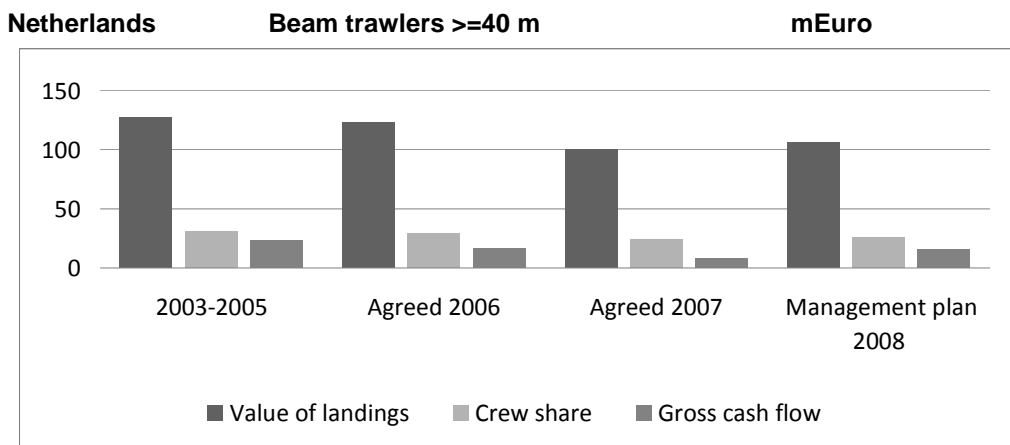
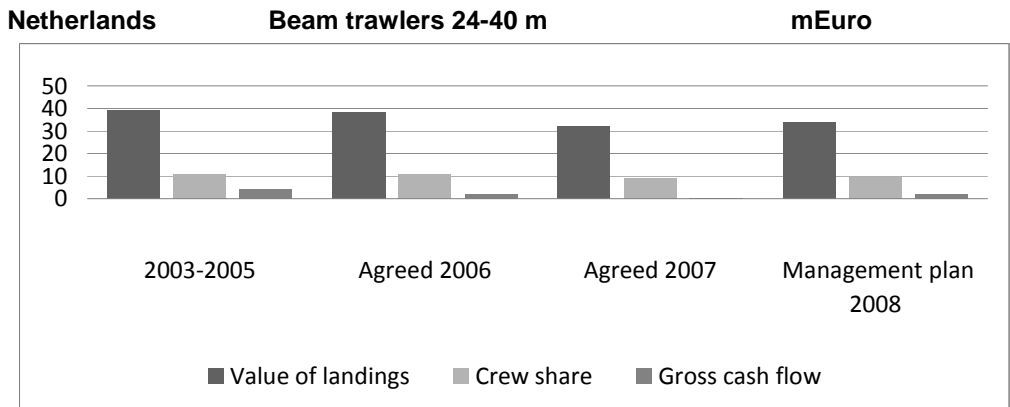
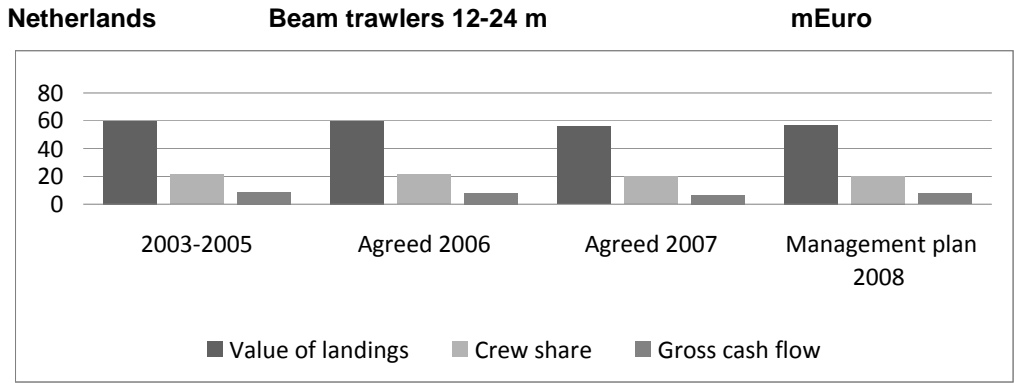
	2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Passive gears <12 m				
Operating profit margin	8.3%	3.0%	5.0%	5.0%
Performance	PROFITABLE	STABLE	PROFITABLE	PROFITABLE
Value of landings	0.4	0.4	0.4	0.3
Crew share	0.2	0.2	0.2	0.1
Gross cash flow	0.0	0.0	0.0	0.0
Net profit	0.0	0.0	0.0	0.0
Gross value added	0.2	0.2	0.2	0.2
Demersal trawl and Seine 24-40 m				
Operating profit margin	22.4%	14.8%	16.9%	13.5%
Performance	PROFITABLE	PROFITABLE	PROFITABLE	PROFITABLE
Value of landings	3.9	3.9	3.8	3.0
Crew share	0.8	0.8	0.8	0.7
Gross cash flow	1.1	0.8	0.9	0.7
Net profit	0.9	0.6	0.6	0.4
Gross value added	2.0	1.7	1.7	1.3
Drift and fixed net 24-40 m				
Operating profit margin	25.0%	21.7%	23.5%	19.6%
Performance	PROFITABLE	PROFITABLE	PROFITABLE	PROFITABLE
Value of landings	1.2	1.3	1.3	1.0
Crew share	0.3	0.3	0.3	0.2
Gross cash flow	0.4	0.4	0.4	0.3
Net profit	0.3	0.3	0.3	0.2
Gross value added	0.7	0.7	0.7	0.5



7. Netherlands

mEuro

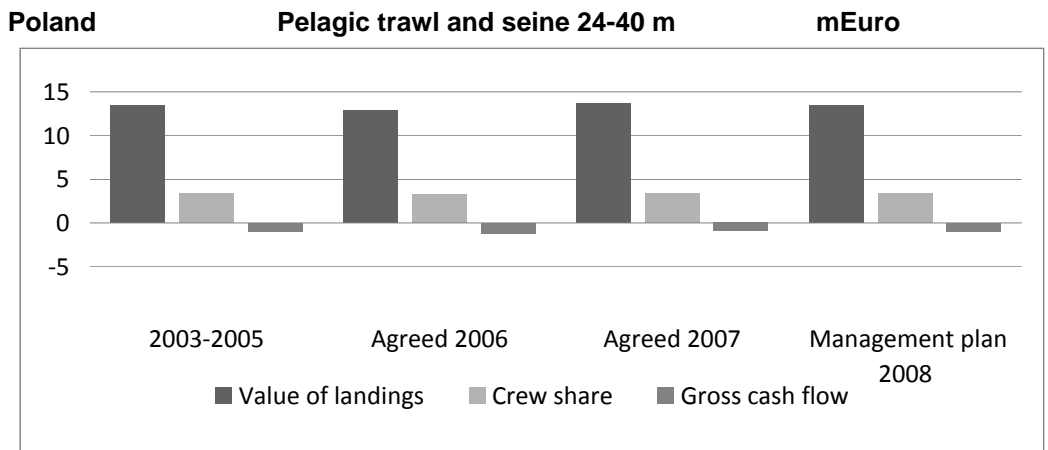
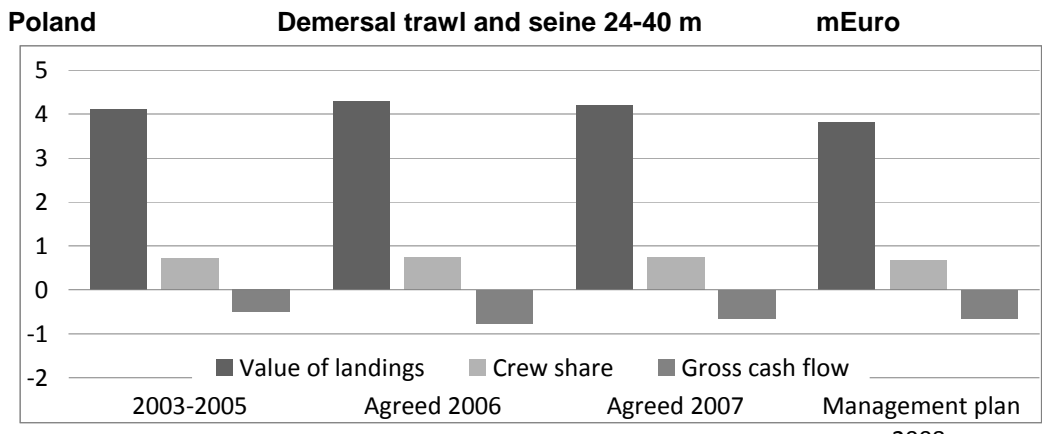
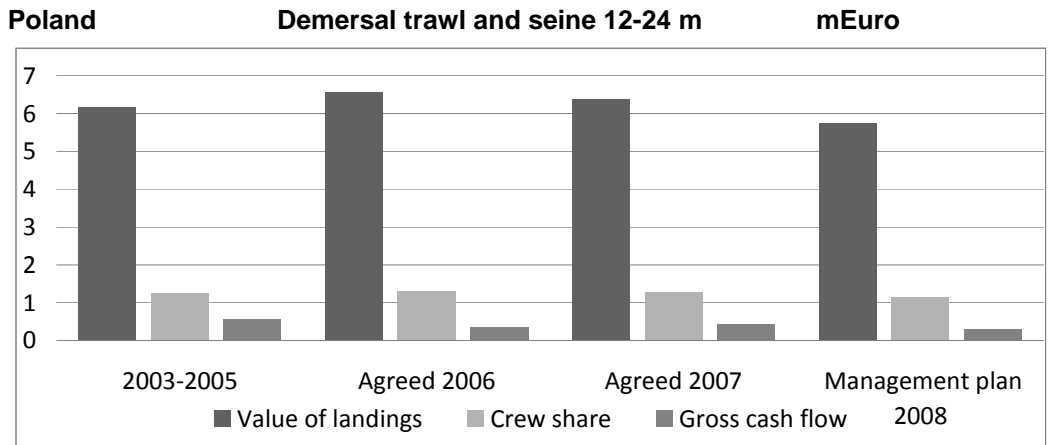
	2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Beam trawlers 12-24 m				
Operating profit margin	0.6%	-0.8%	-3.4%	-1.5%
Performance	STABLE	STABLE	STABLE	STABLE
Value of landings	59.9	59.6	55.8	56.9
Crew share	21.5	21.4	20.0	20.4
Gross cash flow	8.8	8.0	6.6	7.6
Net profit	0.3	-0.5	-1.9	-0.9
Gross value added	30.3	29.3	26.6	28.0
Beam trawlers 24-40 m				
Operating profit margin	-5.9%	-10.9%	-19.5%	-12.5%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	39.3	38.3	31.9	33.6
Crew share	11.0	10.7	8.9	9.4
Gross cash flow	4.1	2.2	0.2	2.2
Net profit	-2.3	-4.2	-6.2	-4.2
Gross value added	15.1	13.0	9.1	11.6
Beam trawlers >=40 m				
Operating profit margin	0.7%	-4.8%	-14.1%	-6.4%
Performance	STABLE	STABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	127.1	123.1	100.5	106.5
Crew share	30.4	29.4	24.0	25.5
Gross cash flow	23.1	16.3	8.0	15.4
Net profit	0.8	-6.0	-14.2	-6.8
Gross value added	53.5	45.7	32.1	40.9
Pelagic trawl and seine >=40 m				
Operating profit margin	-1.8%	2.1%	-5.1%	-8.3%
Performance	STABLE	STABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	136.9	147.6	132.6	124.9
Crew share	35.7	38.5	34.6	32.6
Gross cash flow	24.3	29.7	19.9	16.3
Net profit	-2.4	3.0	-6.7	-10.3
Gross value added	60.0	68.2	54.5	48.9



8. Poland

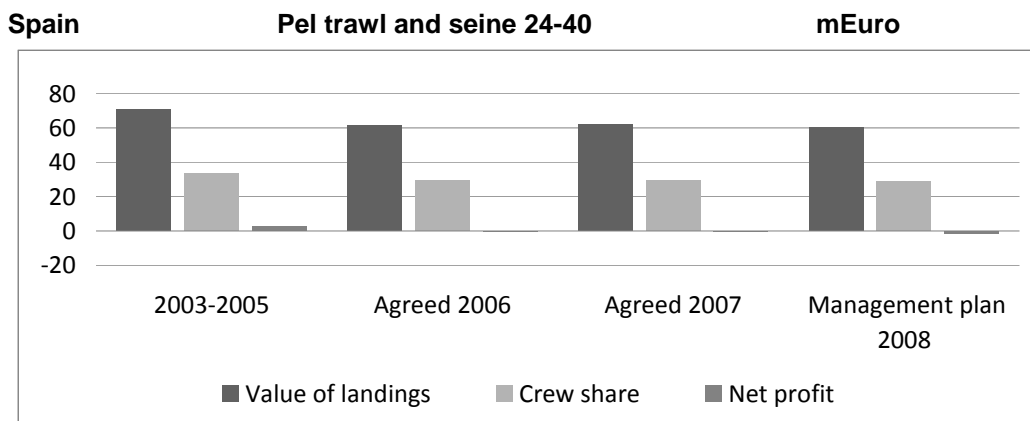
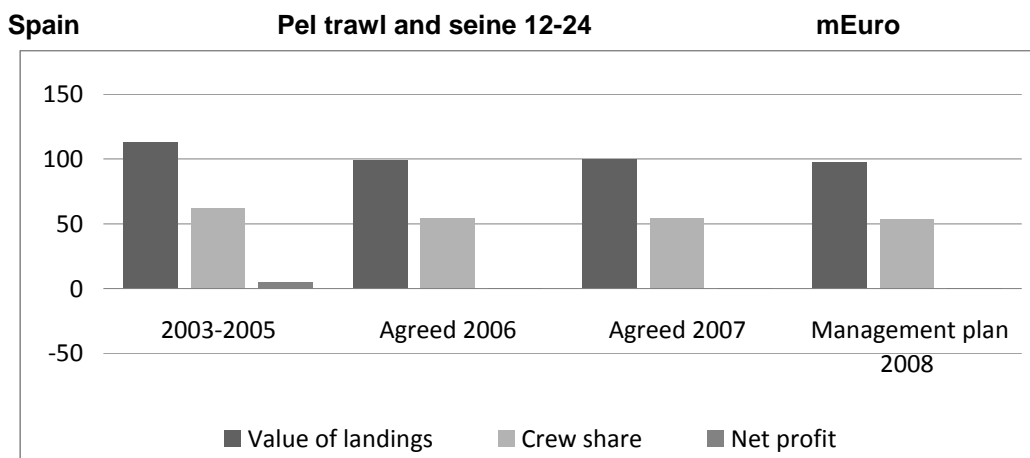
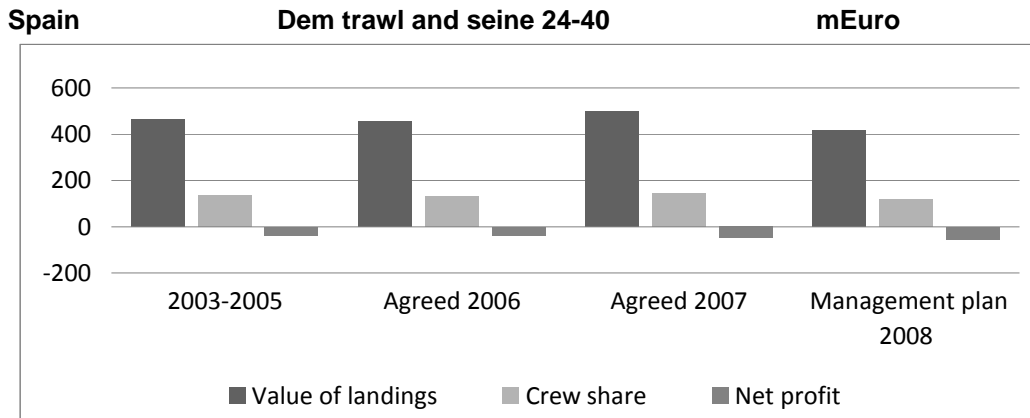
mEuro

	2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Demersal trawl and seine 12-24 m				
Operating profit margin	-21.0%	-23.2%	-22.5%	-27.1%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	6.2	6.6	6.4	5.8
Crew share	1.2	1.3	1.3	1.2
Gross cash flow	0.6	0.4	0.4	0.3
Net profit	-1.3	-1.5	-1.4	-1.6
Gross value added	1.8	1.7	1.7	1.5
Demersal trawl and seine 24-40 m				
Operating profit margin	-65.3%	-68.3%	-67.3%	-74.1%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	4.1	4.3	4.2	3.8
Crew share	0.7	0.7	0.7	0.7
Gross cash flow	-0.5	-0.8	-0.7	-0.7
Net profit	-2.7	-2.9	-2.8	-2.8
Gross value added	0.2	0.0	0.1	0.0
Pelagic trawl and seine 24-40 m				
Operating profit margin	-27.8%	-30.9%	-27.3%	-27.8%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	13.5	12.9	13.7	13.5
Crew share	3.4	3.2	3.4	3.4
Gross cash flow	-0.9	-1.2	-0.9	-0.9
Net profit	-3.7	-4.0	-3.7	-3.8
Gross value added	2.4	2.0	2.5	2.4



9. Spain

mEuro				
Dem trawl and seine 24-40				
Operating profit margin	-8.0%	-8.7%	-9.9%	-13.4%
Performance	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings	463.0	456.3	497.8	418.8
Crew share	133.1	131.1	143.1	120.4
Net profit	-36.9	-39.8	-49.1	-56.3
Gross value added	96.2	91.4	94.0	64.1
Pel trawl and seine 12-24				
Operating profit margin	4.3%	0.6%	0.7%	-0.3%
Performance	STABLE	STABLE	STABLE	STABLE
Value of landings	113.1	99.6	99.8	97.8
Crew share	61.8	54.4	54.5	53.4
Net profit	4.8	0.6	0.7	-0.3
Gross value added	66.6	54.9	55.2	53.1
Pel trawl and seine 24-40				
Operating profit margin	3.7%	-0.8%	-0.6%	-2.2%
Performance	STABLE	STABLE	STABLE	STABLE
Value of landings	70.8	61.8	62.0	60.1
Crew share	33.8	29.5	29.6	28.6
Net profit	2.6	-0.5	-0.4	-1.3
Gross value added	36.4	29.0	29.2	27.3



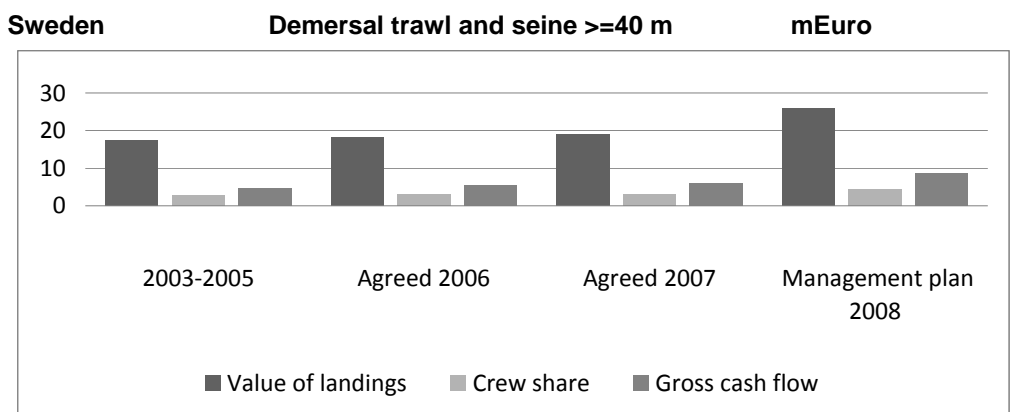
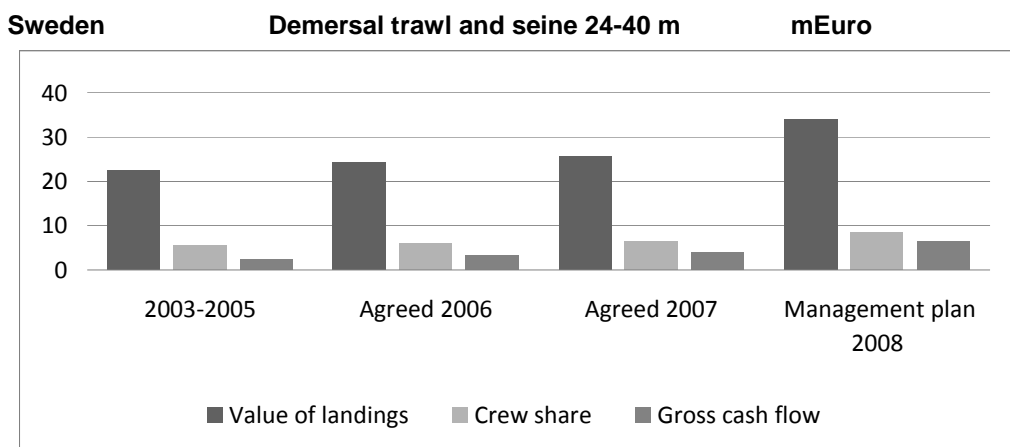
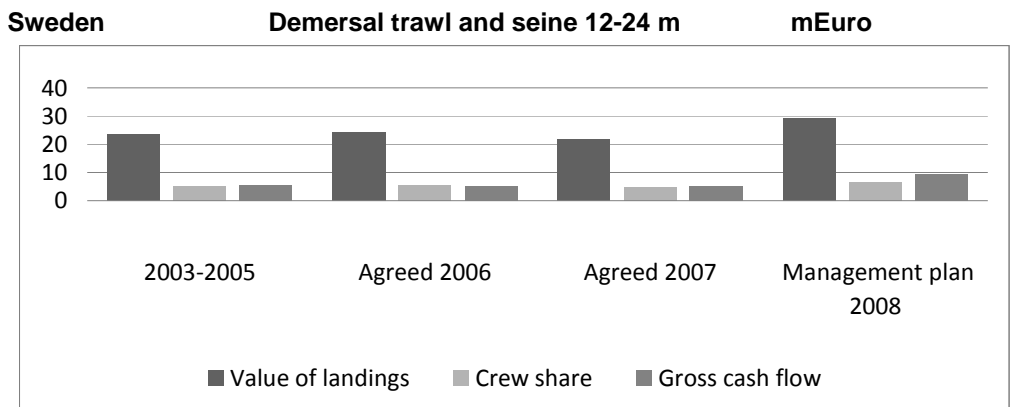
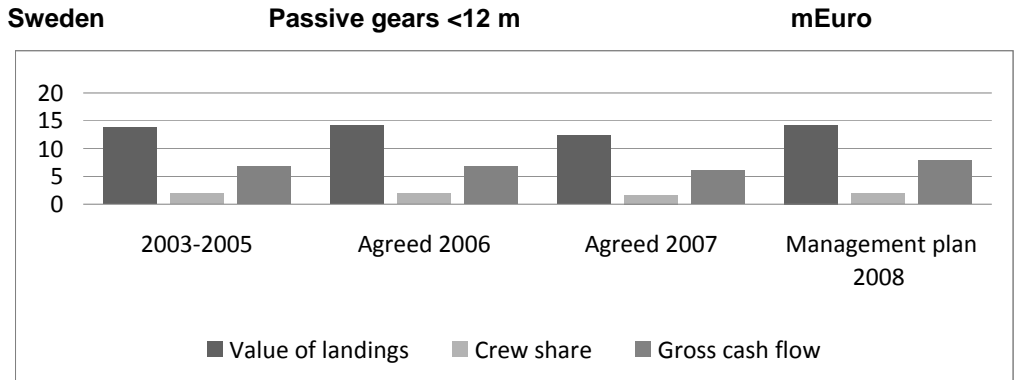
2)

2) It is not possible to present gross cash flow for the Spanish fleet. Net profit is presented instead.

10. Sweden

mEuro

	2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Passive gears <12 m				
Operating profit margin	45.4%	44.7%	44.5%	51.6%
Performance	PROFITABLE	PROFITABLE	PROFITABLE	PROFITABLE
Value of landings	13.8	14.1	12.4	14.3
Crew share	1.9	1.9	1.7	2.0
Gross cash flow	6.7	6.8	6.0	7.9
Net profit	6.2	6.3	5.5	7.4
Gross value added	8.6	8.8	7.7	9.8
Demersal trawl and seine 12-24 m				
Operating profit margin	14.1%	12.9%	14.0%	25.7%
Performance	PROFITABLE	PROFITABLE	PROFITABLE	PROFITABLE
Value of landings	23.7	24.2	21.9	29.2
Crew share	5.3	5.4	4.9	6.6
Gross cash flow	5.3	5.1	5.0	9.5
Net profit	3.3	3.1	3.1	7.5
Gross value added	10.6	10.6	10.0	16.0
Demersal trawl and seine 24-40 m				
Operating profit margin	-0.9%	2.7%	5.1%	10.8%
Performance	STABLE	STABLE	PROFITABLE	PROFITABLE
Value of landings	22.4	24.1	25.7	33.9
Crew share	5.6	6.0	6.4	8.5
Gross cash flow	2.4	3.3	4.0	6.3
Net profit	-0.2	0.7	1.3	3.7
Gross value added	8.0	9.3	10.4	14.8
Demersal trawl and seine >=40 m				
Operating profit margin	19.3%	19.3%	20.8%	26.0%
Performance	PROFITABLE	PROFITABLE	PROFITABLE	PROFITABLE
Value of landings	17.4	18.2	19.1	25.9
Crew share	2.9	3.0	3.2	4.3
Gross cash flow	4.8	5.4	5.8	8.6
Net profit	3.4	3.5	4.0	6.7
Gross value added	7.7	8.4	9.0	12.8

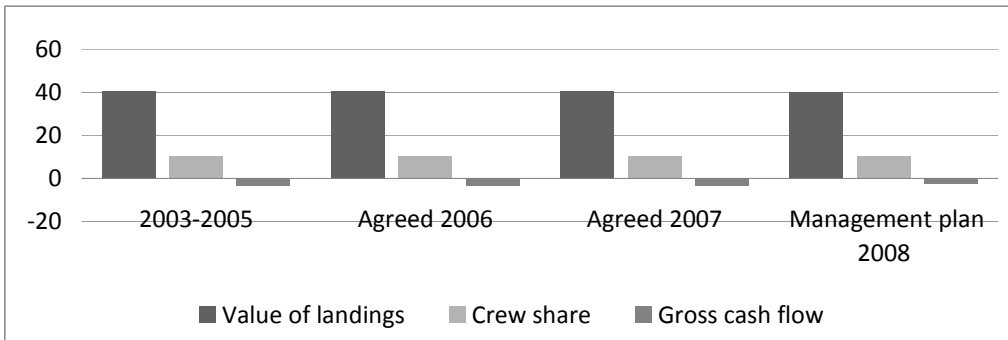


11. United Kingdom

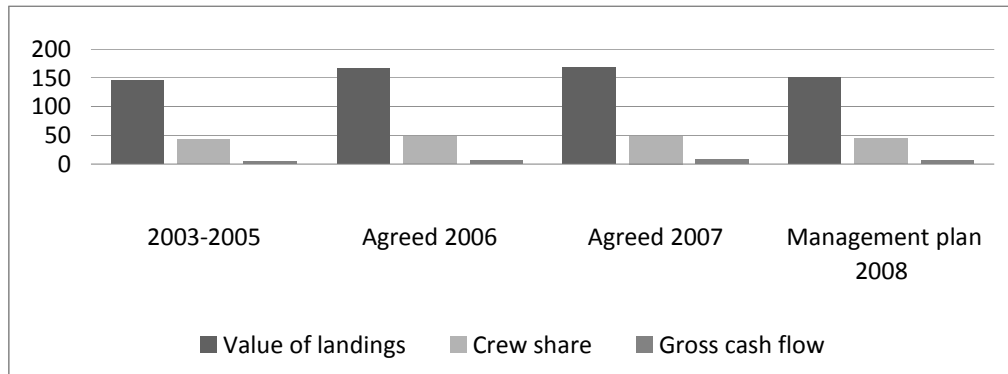
mEuro

		2003-2005	Agreed 2006	Agreed 2007	Management plan 2008
Beam trawlers 24-40 m					
	0	-51.4%	-51.8%	-51.7%	-50.1%
	0	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings		40.7	40.6	40.4	40.3
Crew share		10.4	10.4	10.4	10.3
Gross cash flow		-3.4	-3.6	-3.4	-2.7
Net profit		-20.9	-21.0	-20.9	-20.2
Gross value added		7.0	6.8	6.9	7.6
Demersal trawl and seine 12-24 m					
	0	-9.4%	-7.4%	-6.3%	-8.4%
	0	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings		145.1	165.8	167.7	150.9
Crew share		42.5	48.6	49.1	44.2
Gross cash flow		4.9	6.2	8.0	5.8
Net profit		-13.6	-12.3	-10.6	-12.7
Gross value added		47.4	54.8	57.1	50.0
Dredgers 12-24m					
	0	-10.2%	-10.1%	-10.1%	-10.2%
	0	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE	UNPROFITABLE
Value of landings		28.8	28.9	28.9	28.9
Crew share		9.1	9.2	9.2	9.1
Gross cash flow		0.8	0.8	0.8	0.8
Net profit		-2.9	-2.9	-2.9	-2.9
Gross value added		9.9	10.0	10.0	9.9
Pots and Traps 12-24m					
	0	7.6%	7.6%	7.7%	7.6%
	0	PROFITABLE	PROFITABLE	PROFITABLE	PROFITABLE
Value of landings		24.6	24.7	24.7	24.6
Crew share		8.3	8.4	8.4	8.3
Gross cash flow		4.1	4.1	4.1	4.1
Net profit		1.9	1.9	1.9	1.9
Gross value added		12.4	12.5	12.5	12.4

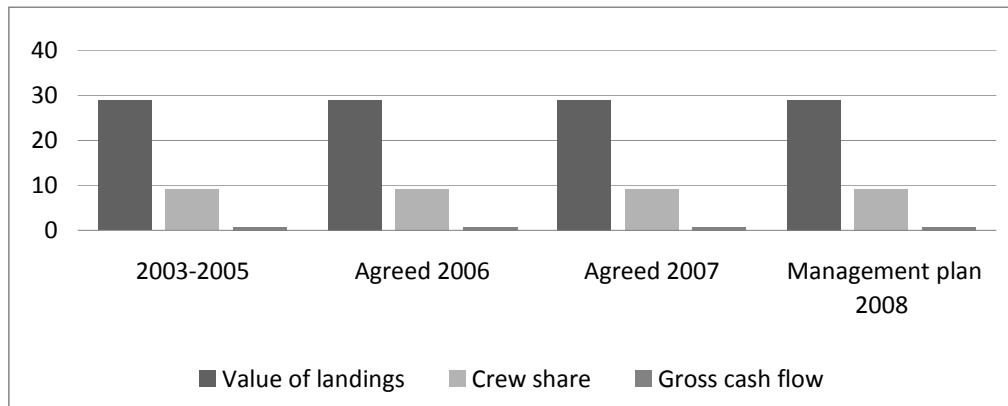
United Kingdom Beam trawlers 24-40 m mEuro



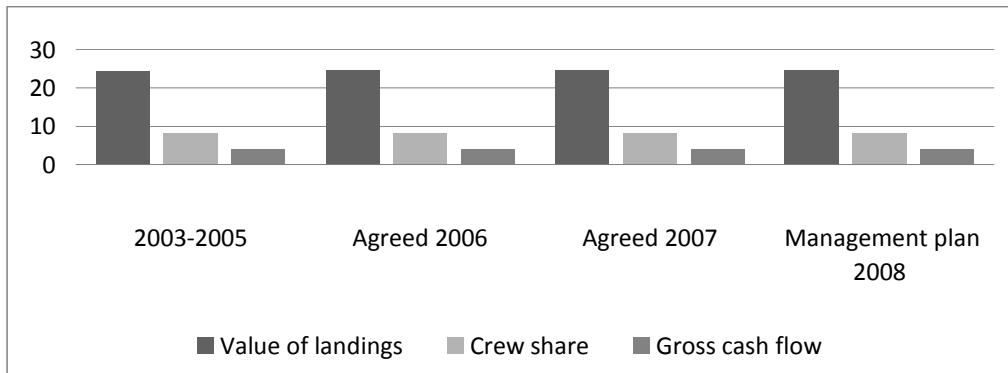
United Kingdom Demersal trawl and seine 12-24 m mEuro



United Kingdom Dredgers 12-24m mEuro



United Kingdom Pots and Traps 12-24m mEuro



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