

ECONOMIC PERFORMANCE OF SELECTED EU FISHING FLEETS

**SUMMARY DOCUMENT PREPARED
BY THE ECONOMIC UNIT OF DG FISH**

December 2007

FOREWORD

This summary document on the "Economic Performance of EU fishing fleets" has been prepared by the European Commission services, in the framework of the Data Collection Regulation (DCR) and drawing on earlier work carried out by a working group of the Scientific, Technical and Economic Committee for Fisheries (STECF). This work is a continuation of the externally financed Concerted Actions which produced similar Annual Economic Reports during 1996-2005.

The economic data have been collected at national level under the common framework of the DCR in its first year of operation. All the data have been provided by the Member States. Interpretation of the economic figures provided in this report should be made with care, as the data are the result of what can be considered as a "trial" exercise, i.e. they are based on samples, surveys and estimations with proxies.

This document presents economic results for 16 national fleets for 2005, representing about 198 000 onboard employees. It contains useful economic information on value added indicators. It provides comprehensive annual economic information on the economic situation of all EU fishing fleets, per country and per major fishing zone, for fisheries administrations and stakeholders, as well as for people not directly concerned with the fisheries sector.

This document further aims to support the economic advice provided by the STECF and to contribute to the inclusion of economic considerations when new measures under the Common Fisheries Policy (CFP) are being developed.

In early 2008 a new call for 2006 data will be launched with the view to update the analysis and aiming at the publication of a more comprehensive and official report. Improvements in data quality and coverage are still essential and in this regard feedback on this document will be appreciated. In particular, suggestions will be welcomed concerning the reporting format, economic indicators used, analysis undertaken, data quality and coverage, and avenues for further examination.

My thanks go to the STECF experts, to the colleagues of the Joint Research Centre and to the members of the Economic Analysis Unit of DG Fish for the dedication they continue to bring to this exercise. I'm sure they will continue to consolidate economic knowledge which is vital to the future evolution of the CFP.



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1. INTRODUCTION

This summary document on the "Economic Performance of Selected EU fishing fleets" has been prepared by the European Commission, under the auspices of the Data Collection Regulation (DCR) and assisted by earlier work carried out by a working group of the Scientific, Technical and Economic Committee for Fisheries (STECF). This work is a continuation of the externally financed Concerted Actions which produced similar reports in the years 1996-2005.

The objective of this document and future reports is to:

- Provide comprehensive annual economic information on the economic situation of all EU fishing fleets, per country and per large fishing zone, for fisheries administrations and stakeholders, as well as for people not directly concerned with the fisheries sector,
- Highlight recent trends in capacity and economic performance of fishing fleets,
- Provide economic interpretation to understand those recent trends, and
- Provide economic variables in order to apply bio-economic models and economic impact assessment.

The document further aims to support the economic advice provided by the STECF according to the EC Regulation 2371/2002 of 20 December 2002, article 33, and to contribute to the inclusion of economic considerations when new measures under the CFP are being developed.

This document is composed of six chapters, organised by country analysis and regional analysis, covering most of EU Member States with marine fisheries. Chapter 6 is an appendix of the main DCR economic indicators for all countries and fleets, based on the fleet segmentation outlined in Appendix 3 of the DCR. Monetary values expressed in the text and tables are given in Euro.

All chapters are set up in an identical manner. They contain general information on the total national fishing fleet and elaborate on the economic performance of one or several specific fleet segments, which can be identified in that country.

The national fleets as well as the fleet segments are discussed in terms of their main characteristics, economic and technical indicators, economic performance in 2005, assessment for 2006 and the outlook for 2007, based on indications of the first six to eight months of 2007. A pie chart depicts the share of each fleet segment of the total production value of the national fishing fleet.

The economic data have been collected at national level under the common framework of the DCR. Interpretation of the economic figures provided in this document should be made with care, as the data are based on samples, surveys and estimations with proxies. The quality and comparability of data enclosed herein would ideally still need external validation. It is imperative that the next 'official' report with 2006 data undergoes such a procedure, and that this document is used as an initial reference point of where potential data inaccuracies have arisen.

2. EXECUTIVE SUMMARY

The summary document presents economic results of 16 national fleets for 2005, representing about 198 000 onboard employees. Regrettably, economic data and analysis for Ireland, Latvia, Malta and Slovenia were not available at the time of report finalisation, although the economic data for Ireland and Latvia are enclosed in the Appendix. Data for Romania and Bulgaria are not yet collected under the DCR.

This document contains useful economic information on value added indicators. We do note, however, that value added on its own is not an indicator of profitability. Such an indicator also depends on the value of invested capital, i.e. the opportunity cost of keeping this capital employed in the fishery.

Many differences are found in terms of economic productivity among EU fleets, countries and regions. These economic differences are explained by different capital intensity, possibilities of fishing quota and the behaviour of fish markets. However, the following general conclusions can be obtained from analysis of the available economic data.

Compared to 2004, the economic performance of EU fleets has deteriorated in 2005, particularly due to fuel price increases. The economic performance in 2006 has followed different trends among fleets, countries and regions, depending on the evolution of fish prices and landings in response to the rise in fuel costs.

- Decline in economic performance in 2006: Many fleets in Spain, Portugal, Italy, Estonia and Finland. The negative economic impact of the increase in fuel price in 2006 has overshadowed the rising fish prices and mitigated positive effects of changing fishing practices and strategies.
- Improvement in economic performance in 2006: Many fleets in France, United Kingdom, Belgium, Sweden, Denmark, Poland, Lithuania and Greece. Operational measures such as the change in fishing practices, rising fish prices and higher fishing possibilities, as well as the impact of economic measures in some countries such as the fuel insurance, have compensated the increase in fuel costs.

The trawling fishing vessels, intensive in consumption of fuel, have suffered the biggest economic deterioration in 2005. The increase in fuel prices has had a considerable impact on the gross value added of trawling fleet, and for demersal trawlers fuel costs can represent up to 50% of total value landings. In contrast, vessels using passive gears have showed some economic improvement.

In relation to 2005 and 2006, the outlook of economic performance for 2007 is brighter. In the longer perspective, the majority of EU fishing fleets are expected to operate at or above the "break even revenue level", i.e. they are able to cover all the cost in the long run. However, this hinges on the immediate evolution of fuel prices, which has once again reignited global concern in the latter months of 2007.

3. GLOSSARY OF ECONOMIC DEFINITIONS AND FISHING GEAR CLASSIFICATIONS

Value of landings: Revenues from sale of fish, sometimes including other minor income (vessel rent, etc.).

Gross value added (GVA): Contribution to gross national product (GNP), sum of remuneration of labour (crew) and capital (owner).

Net profit: Value of landings minus all expenses, including depreciation and interest. This amount is before tax.

Invested capital: Value of the active fleet after depreciation.

Other running costs: Costs depending on vessel activity, excluding fuel, e.g. sale of fish, ice, food, repair of fishing gear, etc.

Vessel costs: Costs which are independent of vessel activity, e.g. insurance, part of maintenance, etc.

Depreciation: Decrease of the value of the vessel and equipment due to age, use, etc.

Interest Opportunity: Costs of capital, i.e. potential interest income which would have been received if the capital value would be in a bank deposit.

Nominal value: Value calculated at current prices, containing effects of inflation.

Real value: Value calculated at constant prices so that the effect of inflation is eliminated.

Break-even revenue: Revenue level at which all costs are covered and net profit is zero.

Productivity: Production value (real or nominal) per unit of input (man-year, kW, etc.)

CODE	FISHING GEAR
MB	Mobile gears
TBB	Beam trawl
NSS	North Sea < 221kW
NSL	North Sea > 221kW
NSO	Outside North Sea
DTS	Demersal trawl and demersal seiner
OTB	Bottom trawl
STB	Single trawl
PTB	Paired trawl
TTB	Twin trawl
MTB	Other multirig trawl
FTB	Four-panels trawl
HTB	High-opening trawl
DSS	Danish and Scottish seiners
SDN	Danish seiners
SSC	Scottish seiners
DTP	Polyvalent
PTS	Pelagic trawls and seiners
OTM	Pelagic trawl
STM	Single trawler
PTM	Paired trawlers
PEL	Pelagic seiner and purse seiner
PELFAD	With FAD
PELNOFAD	Without FAD

CODE	FISHING GEAR
PPS	Polyvalent
DRB	Dredges
DRH	Hydraulic dredge
DRO	Other dredges
MGP	Polyvalent mobile gears
MGO	Other mobile gears
PG	Passive gears
FGL	Fixed gears and lines
FGN	Fixed nets
FTN	Trammel nets
FEN	Entangling nets
GIN	Gill nets
HOK	Gears using hooks
LON	Longlines
LONSUR	Surface longlines
LONBOT	Bottom longlines
LONMID	Mid-waterlines
HOO	Other gears using hooks
HOT	Troll line
HOP	Pole line with live bait
HOW	Pole line without live bait
DFN	Drift nets and fixed nets
DNE	Drift nets
FPO	Pots and traps
FPT	Fish traps, including trap nets and pound nets
FPC	Crustaceans pots with possible subdivision by target species
PGP	Polyvalent passive gears
PGO	Other passive gears
PVG	Polyvalent gears
PMP	Combining mobile & passive gears
NOL	Vessels with no license

Mln	Million
Bln	Billion
EUR	Euro
FTE	Full Time Equivalentents (employment)
GRT	Gross Registered Tonnage (capacity)
GT	Gross Tonnage (capacity)
kW	Kilowatt (engine power)
N.A.	Data not available

4. COUNTRY ANALYSIS

4.1. FRANCE

In 2005 national production amounted to 1 214 mln Euro (excluding the Corsica region and overseas territories). Major segments representing more than 50% of the national value of landings are: Demersal trawl and seiners 12-24 metres long, Pelagic trawl and seiners more than 40 metres long, Drift and fixed nets less than 12 metres long, and Demersal trawl and seiners 24-40 metres long. Most important species are sole, anglerfish, scallops and nephrops, which account for more than 40% of the value of landings.

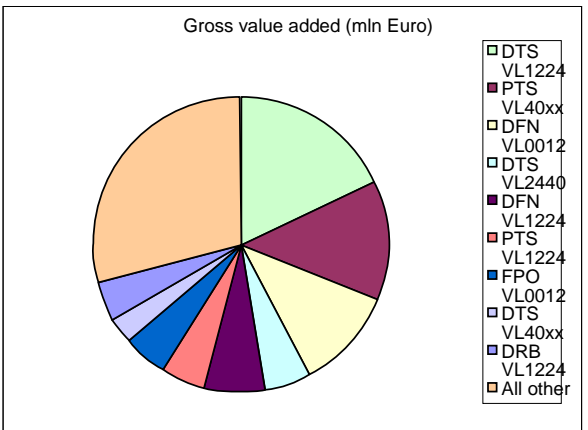
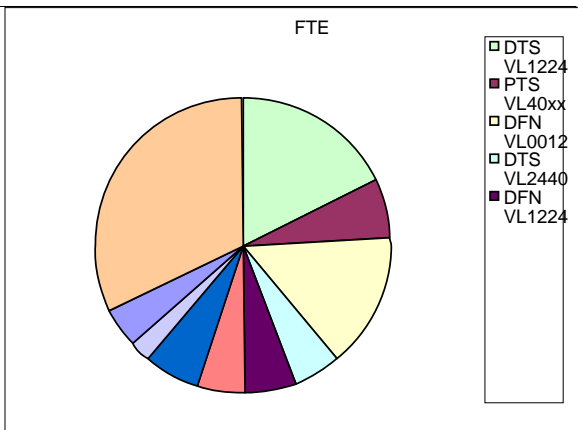
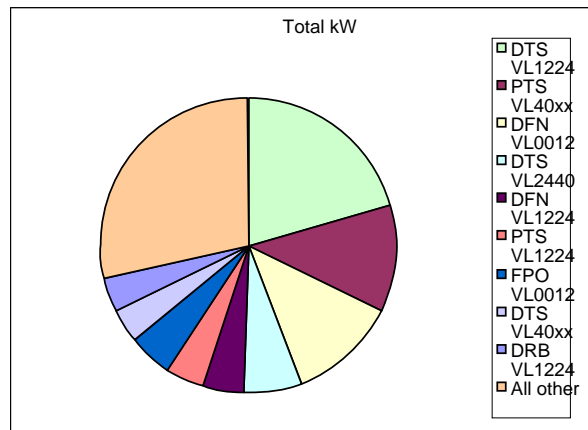
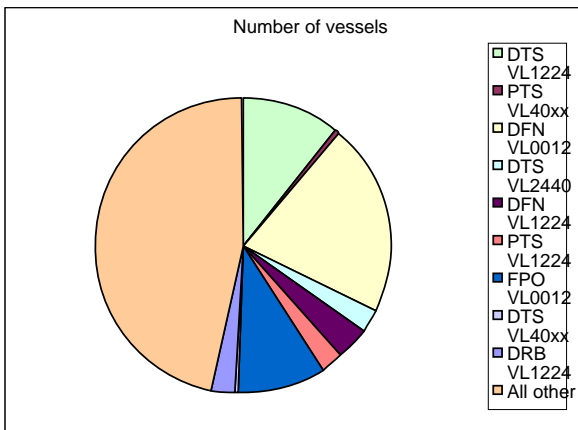
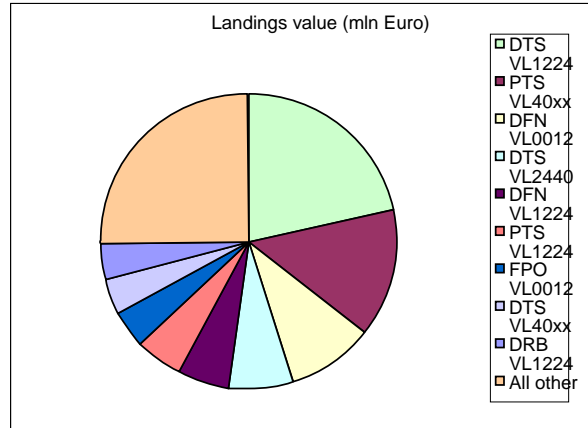
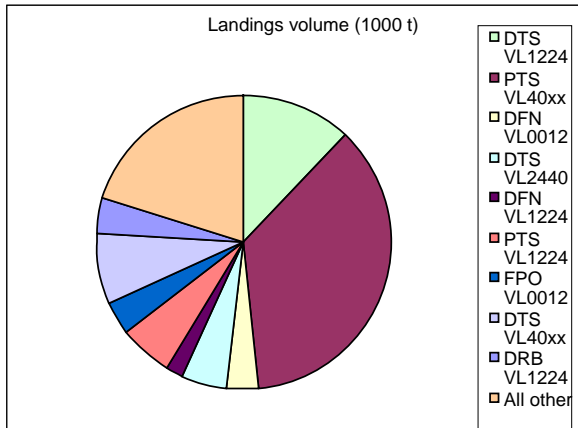
In 2005 the fleet generated income (gross value added) of 679 mln Euro. Gross cash flow is estimated at 202 mln Euro. The best performance, in terms of average net profit, has been achieved by Pelagic trawl and seiners more than 40 metres long (14 mln Euro), followed closely by the Drift and fixed nets less than 12 metres long (12 mln Euro), while Demersal trawl and seiners 24-40 metres long shows the highest loss (- 7 mln Euro). The average crew share in these segments amounted to respectively 62 783, 25 797 and 36 419 Euro/crewman.

The data reflect all the active fleet of the national registered fleet (every vessel that has fished at least one day during the year), except for the Corsica region and overseas islands. A sampling plan is currently set up for these two regions to collect data in the future.

Basic data total national fleet, 2005

Indicator	Value
Value of production (mln Euro)	1 214
Gross Value added (mln Euro)	679
Volume of production (1000 tonnes)	679
Number of FTE	13 648
Number of vessels	4 772

Composition of production by segment



Productivity in 2005

Segment (gear/size)	Gross revenues / vessel (Euro)	Catch / year / vessel (tonnes)	Gross revenues /day (Euro)	GVA / day (Euro)	GVA / FTE (Euro)	Crew share / FTE (Euro)
DTS_VL1224	511 338	169	2 347	1 092	50 248	39 019
DTS_VL2440	672 986	264	3 020	1 225	45 733	36 419
DTS_VL40xx	2 705 941	3 146	9 753	4 000	60 351	54 075
PTS_VL1224	509 519	365	2 689	1 513	47 884	36 769
PTS_VL40xx	5 148 548	7 805	18 785	9 919	105 377	62 783
DRB_VL1224	388 267	192	2 190	1 339	49 940	33 318
DFN_VL0012	113 895	23	607	399	36 846	25 797
DFN_VL1224	439 774	84	1 963	1 229	60 580	41 412
FPO_VL0012	106 614	58	537	351	39 335	27 646
All other	137 773	52	778	503	44 936	30 039

The previous table provides the results of the nine most significant segments in value, representing 75% of the national landings in value in 2005. The “All other” segment includes the 15 other sampled segments, presenting a wide diversity of gears. Thus the vessels are very heterogeneous.

The vessels of some segments work in different regions (Atlantic, Mediterranean, distant water fleet) whereas the TACs are defined by stock only for the ICES area. Thus it is not relevant to provide TAC dependence for the French segments as defined above.

The PTS_VL40xx is a very heterogeneous segment: it includes mostly distant water tropical seiners, but also purse seiners and pelagic trawlers in the Atlantic and Mediterranean.

Change 2004-2005

Segment (gear/size)	Gross revenues / vessel (%)	Catch / year / vessel (%)	Gross revenues /day (%)	GVA / day (%)	GVA / FTE (%)	Crew share / FTE (%)
DTS_VL1224	-3%	-5%	-3%	-10%	-9%	-6%
DTS_VL2440	-7%	-10%	-10%	-25%	-22%	-11%
DTS_VL40xx	11%	n.a.	13%	43%	43%	-6%
PTS_VL1224	-7%	0%	-6%	-14%	-15%	-7%
PTS_VL40xx	2%	-4%	4%	11%	3%	-4%
DRB_VL1224	2%	5%	2%	9%	6%	-1%
DFN_VL0012	4%	4%	3%	3%	0%	-3%
DFN_VL1224	5%	7%	1%	4%	16%	10%
FPO_VL0012	-7%	2%	-11%	-15%	-9%	-11%

The evolution of the “All other” segment is not estimated because four of the segments sampled in 2005 were not sampled in 2004. The composition of the “All other” segment is therefore different from one year to another.

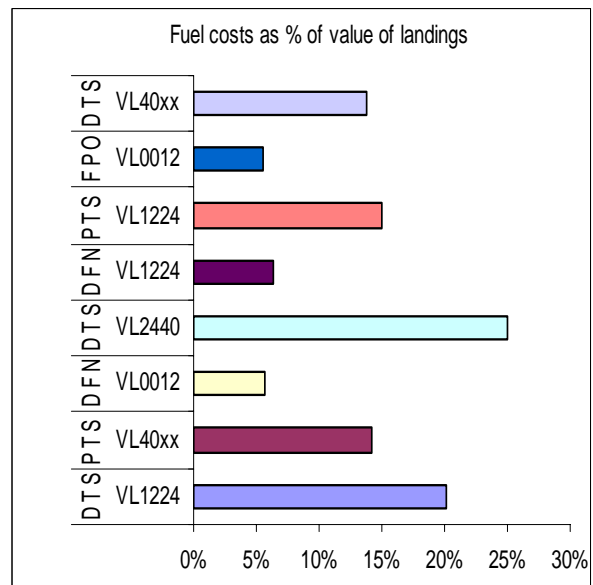
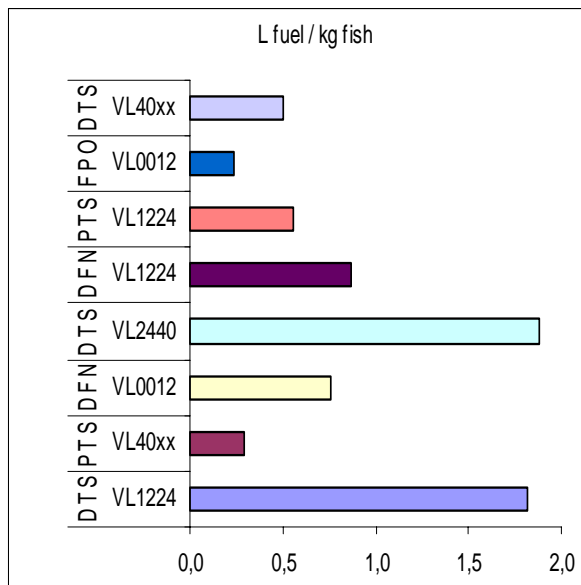
Concerning the Demersal trawl and seiners more than 40 metres long, the high increase in the GVA is explained by the exit of the less competitive vessels from the fleet between 2004 and 2005.

Assessment for 2006

The data currently available regarding the auction sales in 2006 expects to show an increase of the total income of the fleet. Indeed, the decrease in landings in volume noticed for most of the significant species has been compensated by an increase in the price of the majority of these species. Thus an increase, or at least a stagnation in value of landings, has been noticed for major species such as sole (+5%), anglerfish (+3%), scallops (+8%) and nephrops (0%). Nevertheless, for some other species, the evolution of the price did not compensate the decrease in volume (squid and hake, respectively -7% and -29% in value).

The continuing rise in the fuel price between 2005 and 2006 (+16%) will probably affect the economic performance of the fleet, especially the trawlers. Nevertheless, the fuel insurance set up in 2004 until 2006, and the change in fishing practices and strategies, will probably decrease the impact of the increase in fuel price on the GVA.

Energy efficiency



4.2. BELGIUM

In 2005 national production amounted to 86 mln Euro. Major segments are beam trawlers (TBB 24-40 and TBB 12-24), representing 95% of the national value of landings. Most important species are sole and plaice, which account for 51% of the value of landings.

In 2005 the fleet generated 26 mln Euro gross value added with a net loss estimated at 14 mln Euro. The best performance has been achieved by the fixed gear vessels, while the large beam trawlers show the highest loss. The average crew share in these segments amounted to 63 445 Euro/crewman. From 2002 to 2005 there has been a constant reduction in profits generated by the whole fleet.

However, in 2006 the average fish prices increased considerably (+12%), while the number of vessels in the fleet was reduced to 107 at the end of the year, in an effort by authorities to improve the economic conditions of the remaining vessels.

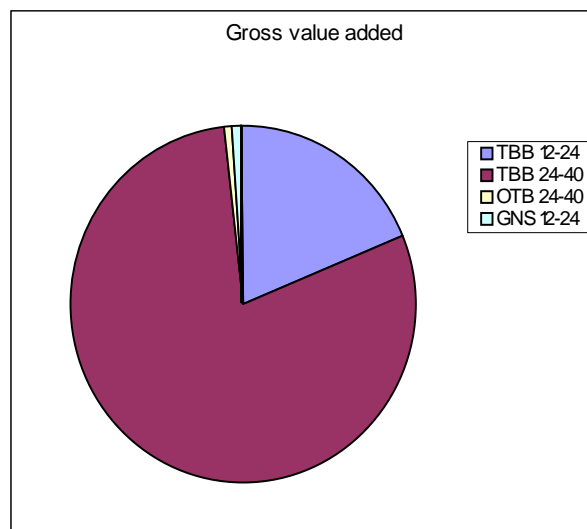
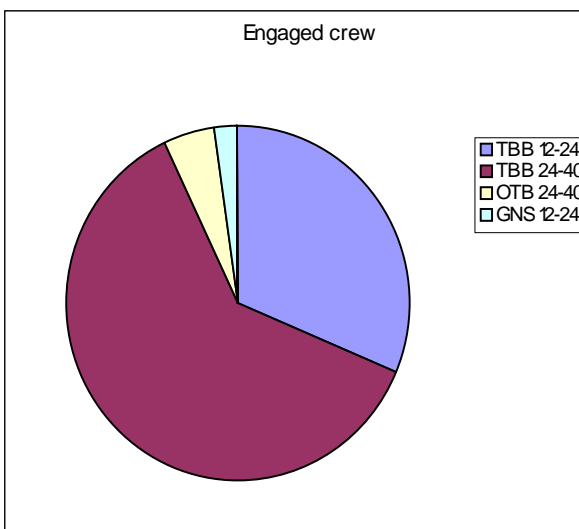
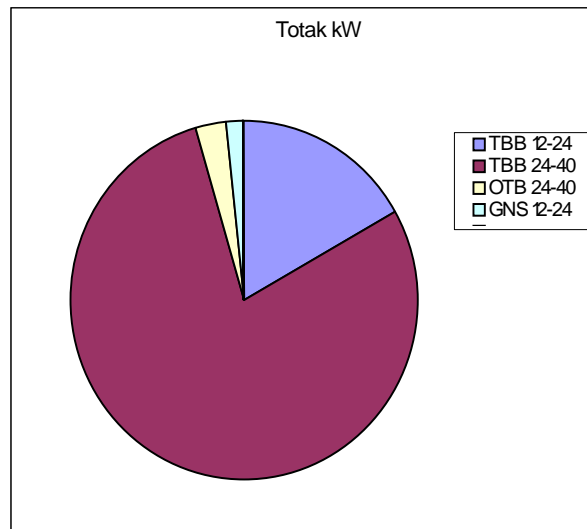
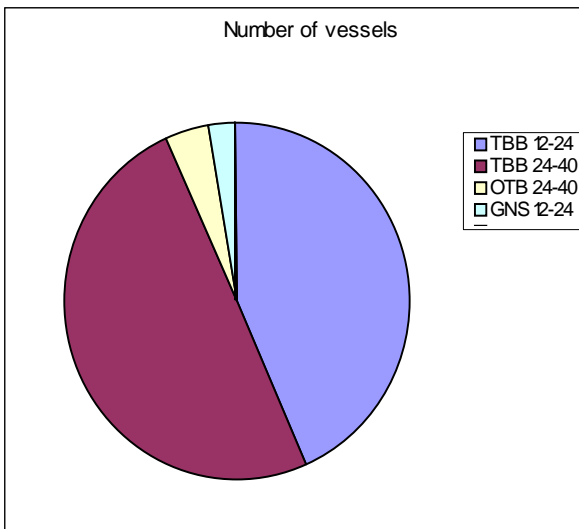
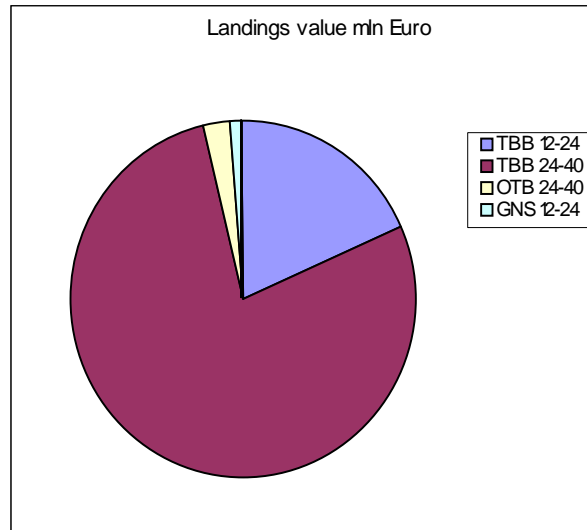
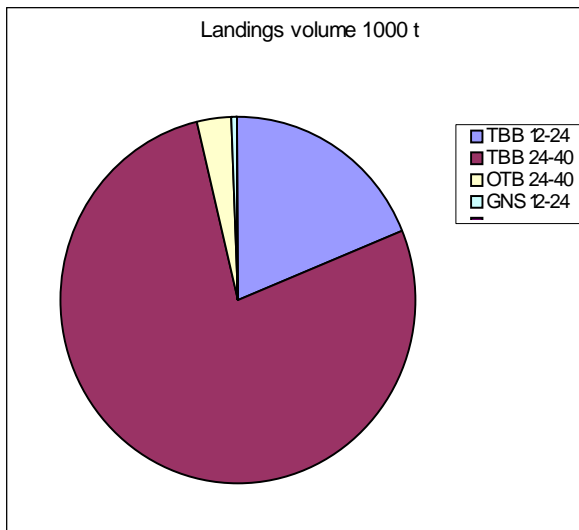
Overall the quota decreased slightly, while the average fuel price was 12% higher than in 2005. Thus the 2006 performance for individual vessels is expected to be similar or marginally better than in 2005.

The outlook for 2007 is more favourable, because fuel prices seem to have stabilised below the 2006 peak. Data reflect all vessels in the EU Fleet Register during the year 2005.

Basic data total national fleet, 2005

Indicator	Value
Value of production (mln Euro)	86
Gross Value added (mln Euro)	26
Volume of production (1 000 tonnes)	22
Number of engaged crew	570
Number of vessels	120

Composition of production by segment



Productivity and TAC dependence in 2005

Segment (gear/size)	Gross revenues / vessel (Euro)	Catch / year / vessel (tonnes)	Gross revenues /day (Euro)	GVA / day (Euro)	GVA / FTE (Euro)	Crew share / engaged crewman (Euro)	TAC dependence (%) *
TBB 12-24	308 266	78	2 359	711	26 983	36 789	81
TBB 24-40	1 111 693	278	4 957	1 512	57 780	63 445	94
OTB 24-40	427 156	131	2 555	206	6 368	161 727	89
GNS 12-24	293 638	41	3 080	706	16 823	25 174	66

*Approximate share of TAC species in the gross revenues

Change 2004-2005

Segment (gear/size)	Gross revenues / vessel (%)	Catch / year / vessel (%)	Gross revenues /day (%)	GVA / day (%)	GVA / FTE (%)	Crew share / engaged crewman (%)
TBB 12-24	0.09	-0.04	0.12	34	21	-28
TBB 24-40	0.01	-0.10	0.06	-27	-34	-10
OTB 24-40	0.22	-0.08	0.20	-79	-9	241
GNS 12-24	0.06	-0.07	0.11	-45	-47	4

Performance 2006

Segment (gear/size)	TAC (1000t)	Landings (1000t)	Average fish price (Euro/t)	Gross revenues (mln Euro)	Effort (% of 2005)	Fuel costs (mln Euro)	Total costs (mln Euro)
TBB 12-24		4	4 703	18	94	5	19
TBB 24-40		15	4 436	68	92	26	73
OTB 24-40		1	3 757	4	56	0.4	7
GNS 12-24		0	8 346	1	91	0.1	1

4.3. CYPRUS

In 2005 national production amounted to 7.36 mln Euro. Major segments are Passive gears <12m, Passive Polyvalents 12 – 24m and Demersal Trawlers 12-24m, representing 96.6% of the national value of landings. Most important species are red mullet, bogue and *Octopus vulgaris* which account for 92.6% of the value of landings.

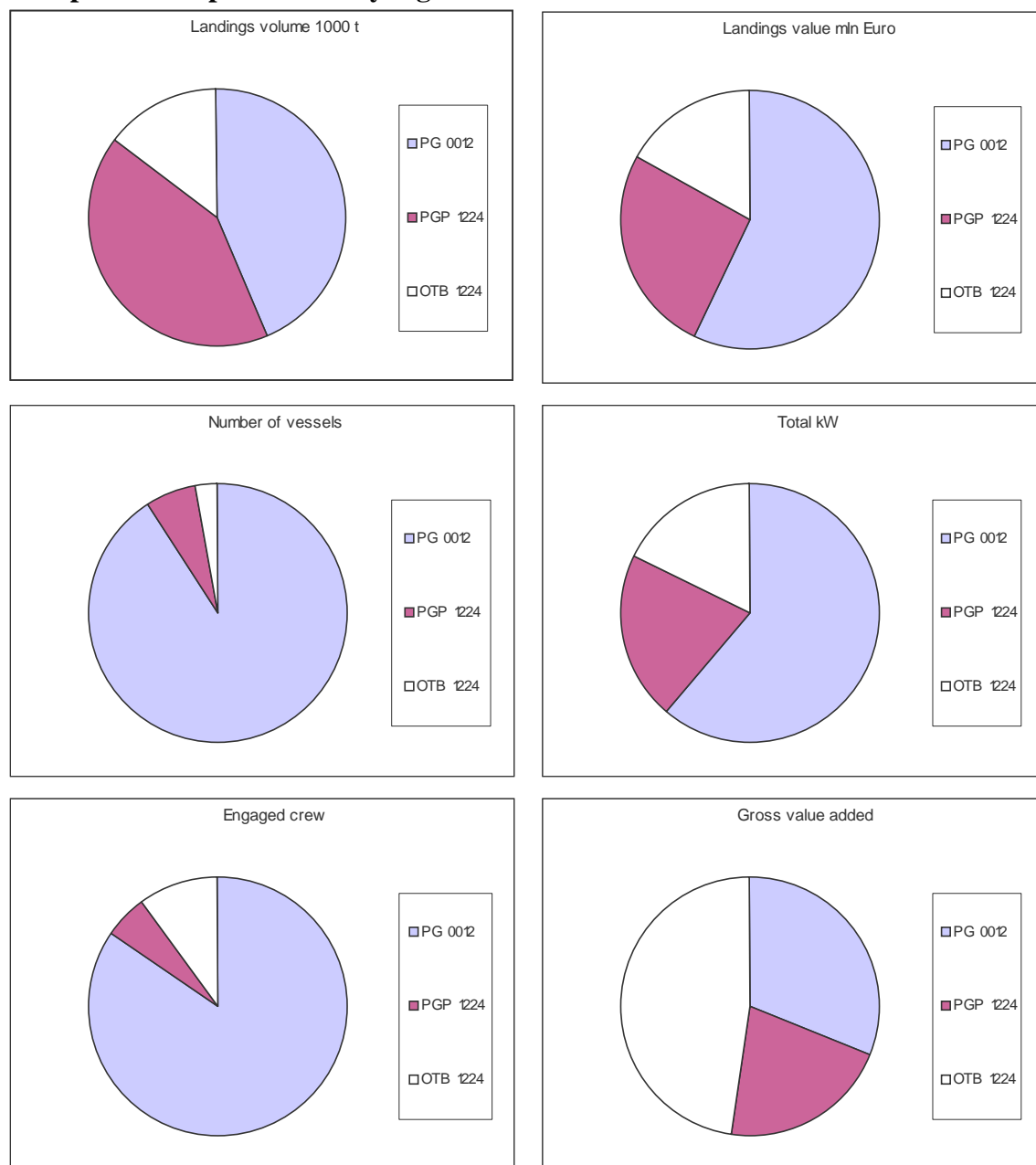
In 2005 the fleet, except for one purse seiner fleet, generated income (gross value added) of - 0.46 mln Euros. Net loss is estimated at 3.5 mln Euros. The Passive gears <12m segment shows the highest loss.

The average crew share in the Passive gears <12m segment amounted to 0.5 mln Euro (537 Euro/crewman), in the Passive Polyvalents 12 – 24m segment amounted to 1.03 mln Euro (16 176 Euro/crewman), whereas the average crew share in the Demersal Trawlers 12-24m segment amounted to 0.6 mln Euro (5 438 Euro/crewman).

Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	7.36
Value added (mln Euro)	-0.46
Volume of production (1 000 tonnes)	1.30
Number of engaged crew	1 142
Number of FTE	1 072
Number of vessels - Active	550

Composition of production by segment



Productivity and TAC dependence in 2005

Segment (gear/size)	Income / vessel (Euro)	Catch / year / vessel (tonnes)	Income /day (Euro)	GVA / day (Euro)	GVA / FTE (Euro)	Crew share / engaged crewman (Euro)	TAC dependence (%) *
PG 0012	8 140	1 138	48.22	-13.26	-1 261.20	537.18	0
PGP 1224	54 311	15 969	1 528.62	636.1	12 006.45	16 176.16	41.9%
OTB 1224	75 432	11 979	750.10	-72.288	-1 038.43	5 438.03	0

*Approximate share of TAC species in the Income

4.4. DENMARK

In 2005 national production amounted to 381 mln Euro. Major segments are PTS40XX and PTS2440, representing 47% of the national value of landings. Most important species are cod, herring, mackerel and nephrops, which account for 15%, 12%, 11% and 11% of the value of landings respectively. Industrial fish of mainly sprat and Norway pout accounted for 15% of total revenue in 2005. In 2005 the fleet generated income (gross value added) of 216 mln Euro.

Overall net profit is estimated at -12 mln Euro. The best performance has been achieved by PTS40XX with a net profit at 17 mln Euro. The only other segments with positive net profit were the Mussel dredgers DRB and the Shrimp trawlers TBB1224, while all other segments showing losses, most significantly for the PTS2440.

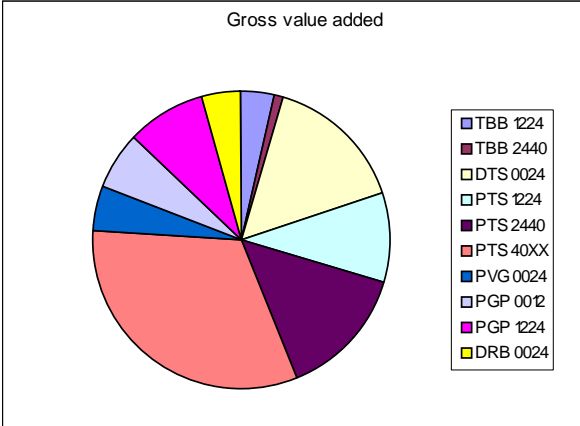
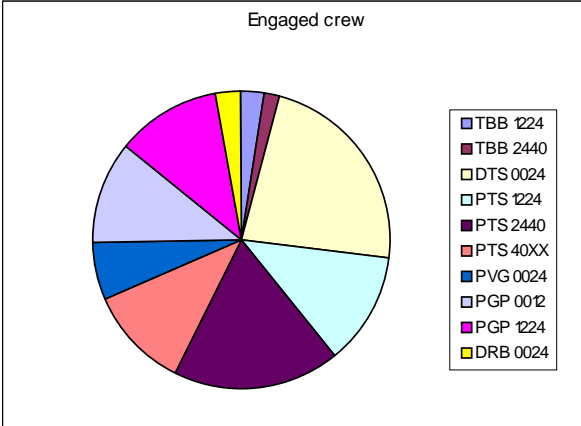
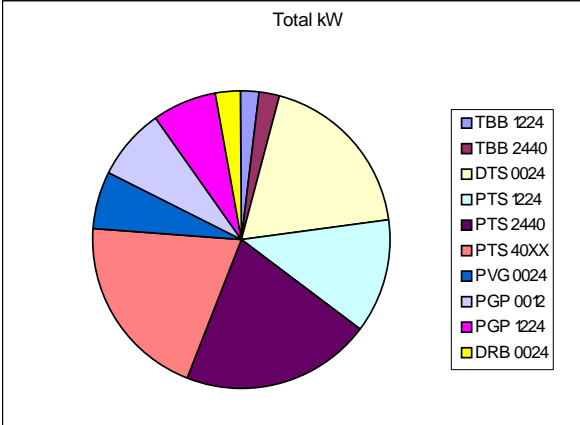
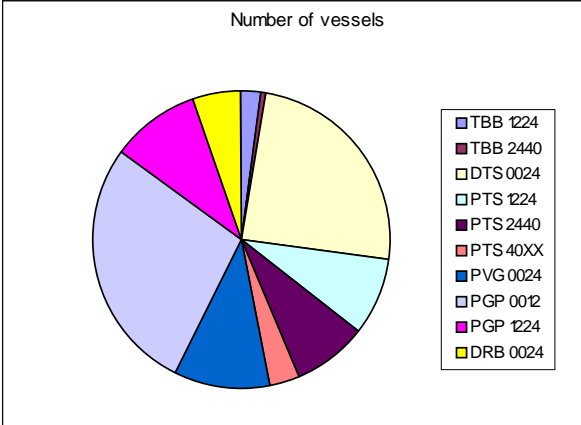
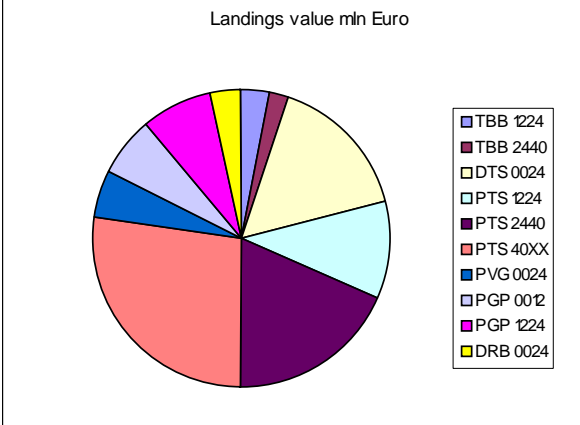
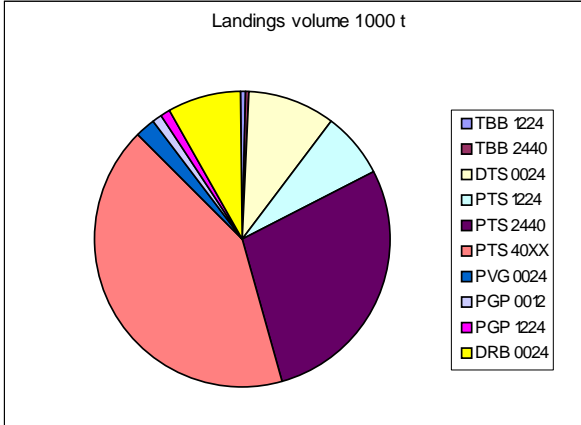
The average crew share in the PTS40XX segment amounted to 676 000 Euro per vessel, which divided by the average crew size of 8 measured in FTE equals to 84,000 Euro/FTE. For the other segments the crew share lies between 44 000 Euro/FTE for PVG0012 and 67 000 Euro/FTE for DRB0012.

After lower profit generation in 2004, (43.9 mln Euro) there is a slight increase in the profitability in 2005 at 63.4 mln Euro for the whole fleet. In 2006, the value of the national production has been 10% higher than in 2005. The most significant factor behind the increased income lies in higher prices for industrial fish, herring and nephrops, which should imply that the trawlers have an improved performance in 2006. For the vessels using passive gears the performance in 2006 has been only slightly better than in 2005.

Basic data for total national fleet, 2005

Indicator	Value
Income (mln Euro)	380.6
Gross value added (mln Euro)	216.0
Volume of production (1000 tonnes)	887.5
Number of FTE	2 835
Number of vessels	1 167

Composition of production by segment



Productivity in 2005

Segment (gear/size)	Income /vessel (Euro)	Yearly catch /vessel (tonnes)	Income /days at Sea (Euro)	GVA /days at Sea (Euro)	GVA /FTE (Euro)	Crew share /FTE (Euro)
DRB 0012	191 006	892	1 597	1 237	99 298	56 177
DRB 1224	220 655	1 601	2 684	1 726	122 198	67 072
DTS 0012	91 143	199	888	513	55 211	57 401
DTS 1224	214 619	305	1 338	749	51 245	46 953
PGP 0012	74 700	31	568	328	44 264	49 297
PGP 1224	250 382	95	1 712	1 101	58 778	47 375
PTS 1224	409 851	682	2 200	1 144	59 207	48 482
PTS 2440	741 636	2 630	3 411	1 527	60 322	46 549
PTS 40XX	2 771 626	9 579	14 630	9 297	219 630	84 343
PVG 0012	77 026	50	647	328	50 949	44 263
PVG 1224	239 659	240	1 786	978	60 942	49 782
TBB 1224	419 929	159	2 620	1 850	103 573	65 960
TBB 2440	1 387 859	596	6 118	2 005	61 505	55 417

Change 2004-2005

Segment (gear/size)	Income /vessel (%)	Yearly catch /vessel (%)	Income /days at Sea (%)	GVA /days at Sea (%)	GVA /FTE (%)	Crew share /FTE (%)
DRB 0012	-23	-37	12	6	-7	-14
DRB 1224	-32	-26	-2	-13	-31	-22
DTS 0012	52	22	94	111	109	11
DTS 1224	19	9	19	28	30	11
PGP 0012	8	-13	13	14	18	5
PGP 1224	16	15	13	11	16	10
PTS 1224	15	7	20	24	24	15
PTS 2440	18	-13	20	30	24	9
PTS 40XX	51	3	81	115	68	21
PVG 0012	19	3	7	8	27	-7
PVG 1224	-12	36	3	3	0	5
TBB 1224	40	26	37	48	42	22
TBB 2440	19	16	14	10	-6	-5

4.5. ESTONIA

In 2005 national production amounted to 34.6 mln Euro. Major segments are VL40XX and VL1224, representing 91% of the national value of landings. Most important species are shrimp, herring, sprat, Atlantic redfish and Greenland halibut, which account for 87% of the value of landings.

In 2005 the fleet generated income (gross value added) of 4.5 mln Euro. Net profit is estimated at 0.8 mln Euro. The best performance has been achieved by VL40XX, while VL2440 or 6 230 Euro/crewman.

In 2006 average fish prices increased to a small degree, while the number of vessels in the fleet remained approximately the same as in 2005. The quota decreased slightly, while the average fuel price was higher than in 2005. In view of trends in landings, prices and fuel costs, the performance in 2006 has been probably worse than in 2005. Data reflect all 1 040 active fishing vessels from the Estonian Fleet Register

Basic data total national fleet, 2005

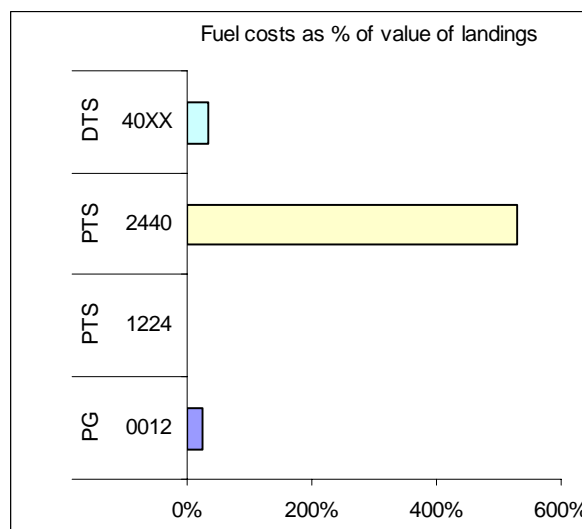
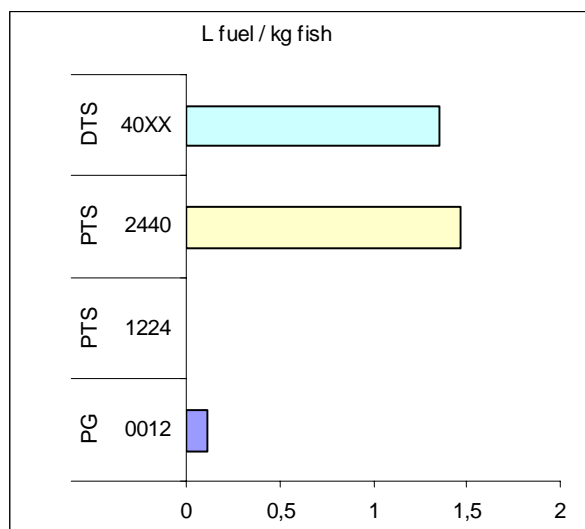
Indicator	Value
Value of production (mln Euro)	43.6
Gross Value added (mln Euro)	4.5
Volume of production (1 000 tonnes)	93.8
Number of engaged crew	2 701
Number of FTE	998
Number of vessels	1 040

Productivity and TAC dependence in 2005

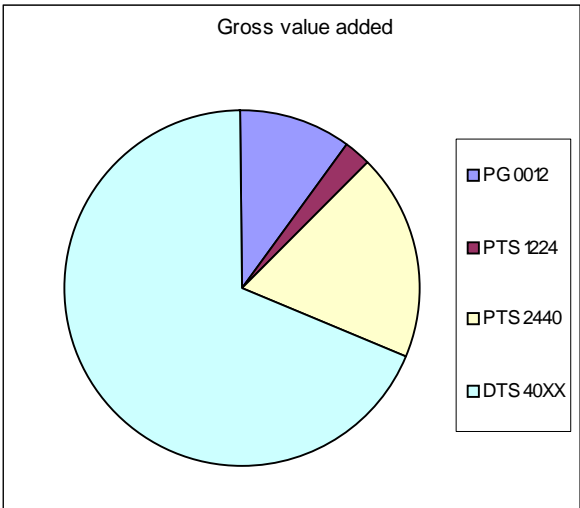
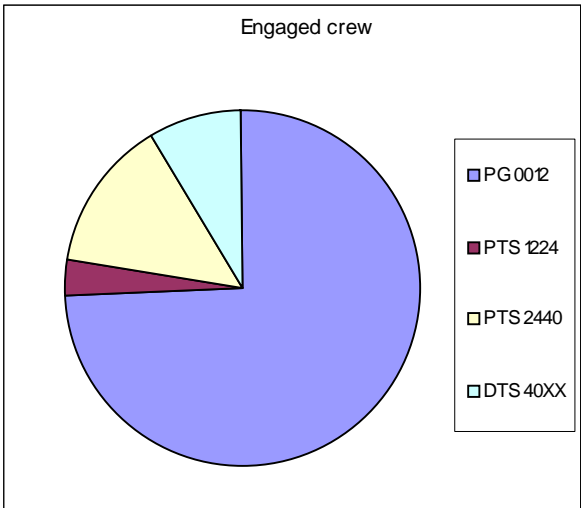
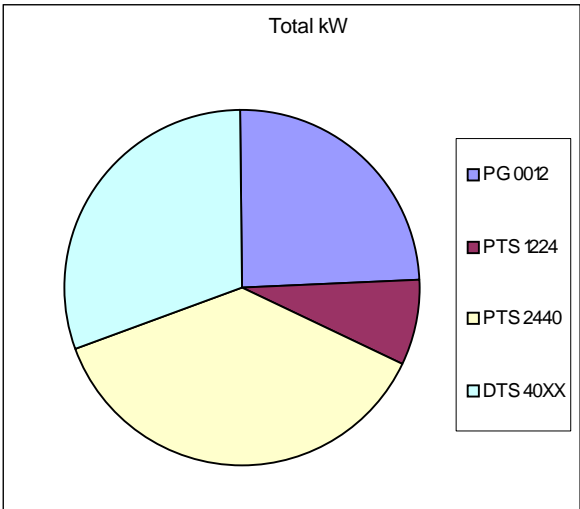
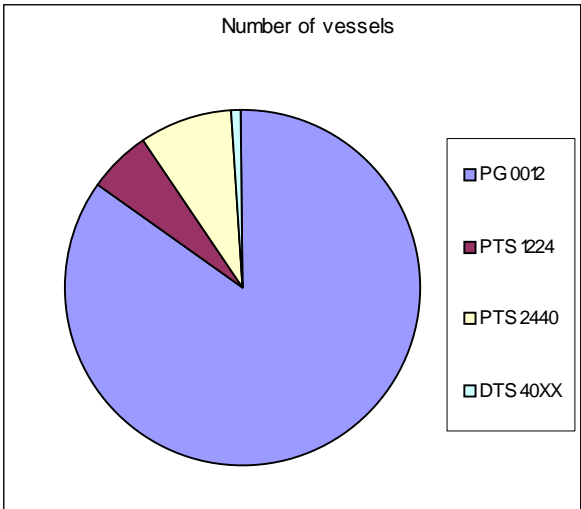
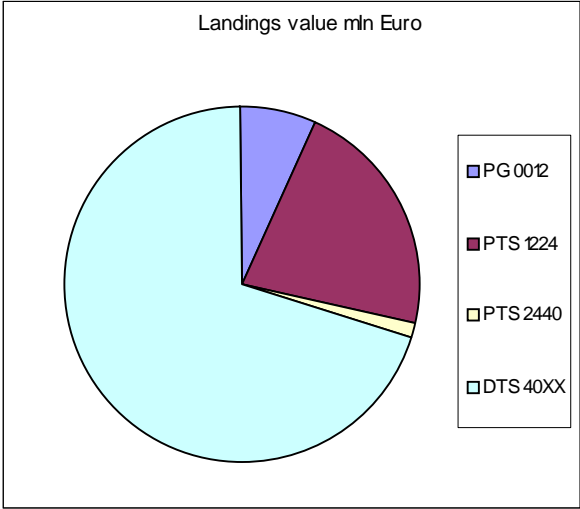
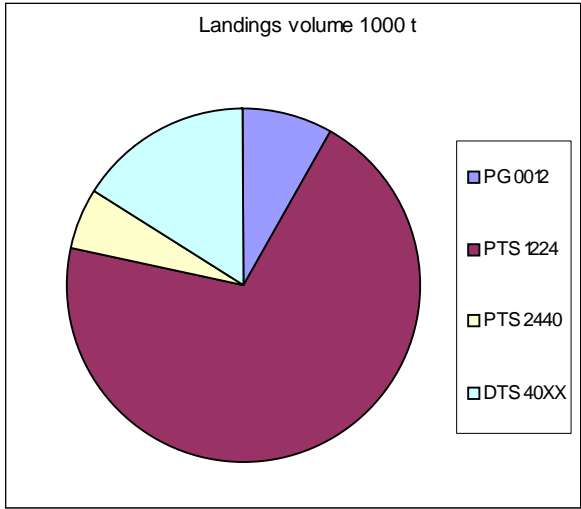
Segment (gear/size)	Gross revenues / vessel (Euro)	Catch / year / vessel (tonnes)	Gross revenues /day (Euro)	GVA / day (Euro)	GVA / FTE (Euro)	Crew share / engaged crewman (Euro)
PG/0012	2 722.7	8 853	-	-	3 843.8	575.7
PTS/1224	122 644	930	131 251	5 243.7	3 396.4	3 073.9
PTS/2440	5 656.2	57.3	762	3 217.7	5 924.7	6 234.4
DTS/40XX	2 688 519	1 696.3	6 654	2 243.9	35 168	10 218.3

*Approximate share of TAC species in the gross revenues

Energy efficiency



Composition of production by segment



4.6. FINLAND

The Finnish fleet is divided into four segments: pelagic trawlers under and over 24 m, offshore fleet fishing with driftnets and gillnets, and coastal vessels. The pelagic trawlers dominated the fisheries in terms of volume and value, catching Baltic herring and sprat. Trawlers represented 63% of the national value of landings. Small-scale fisheries were the largest segment in numbers. They accounted for one third of value of landings. Most important species for coastal fisheries were non-quota freshwater species.

In 2005 national production amounted to 20.6 mln Euro and the fleet generated income (gross value added) of 10.5 mln Euro. The total value of catches decreased from the previous year, together with volume. However, while the number of vessels decreased, the profitability of the fleet improved slightly. Taking into account estimated wages and capital costs the fleet operates close to zero profit, implying economic overcapacity.

The large pelagic trawlers are the most efficient and generated the highest revenues per vessel and the best performance per fisherman. Number of small trawlers decreased significantly by 30%. However, the improved per vessel profitability was not high enough to turn the segment results positive. Also the number of coastal vessels was down, increasing the profitability of the segment.

2006 landings were up in volume due to the favourable stock development and higher TACs. The growth in catches was achieved by the large trawler segment, while the other segments were down in volume. The size of the fleet continued to decrease. In 2006, fuel prices continued to be record-high, depressing the profitability.

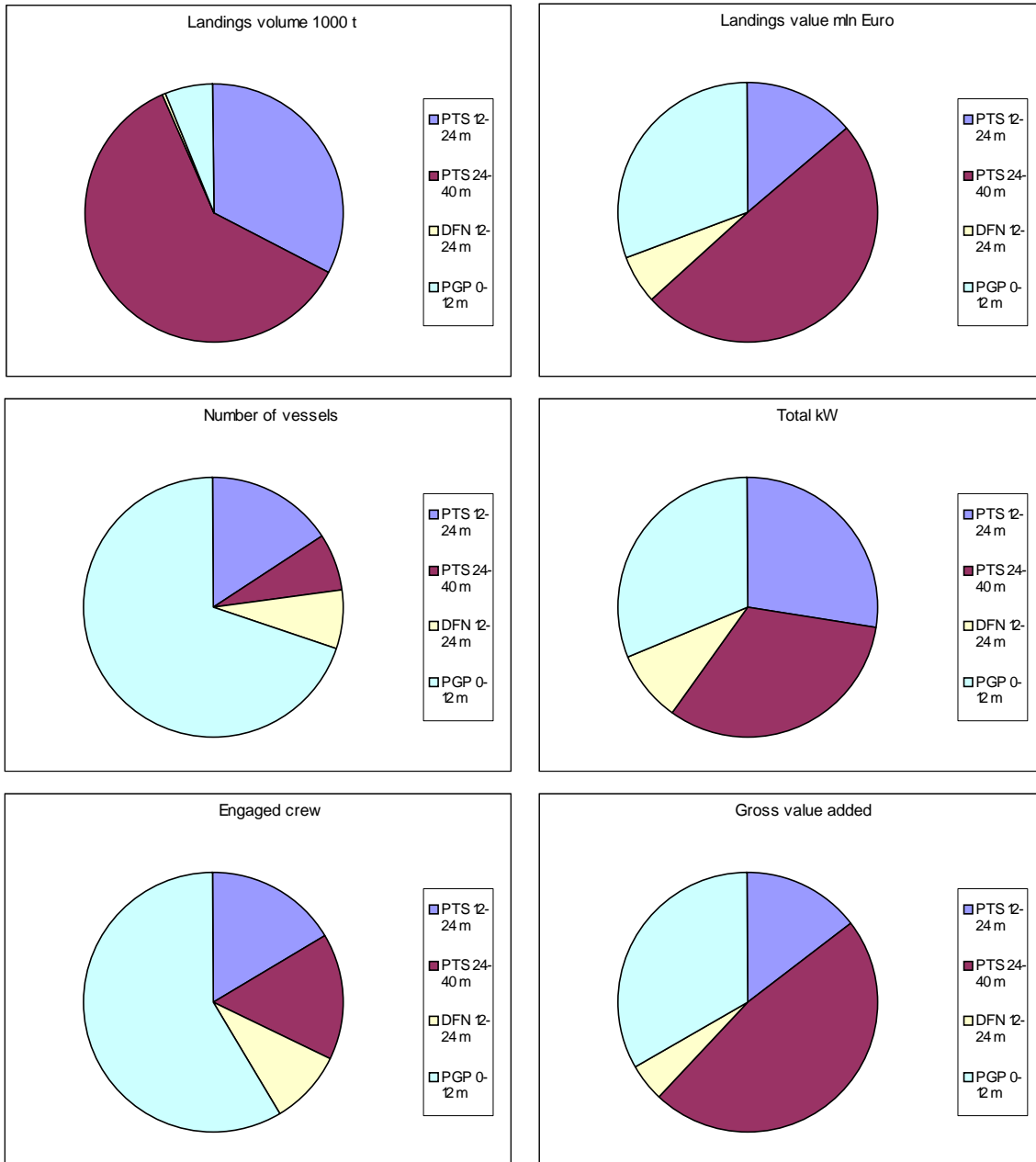
The outlook for 2007 is slightly favourable, since the TACs were up and fuel prices showed a slight decrease at the beginning of the year. The size of the fleet will most probably continue to decrease, largely due to the poor profitability.

The analysis is based on data that covers fishing firms with a catch value over 9 134 Euro.

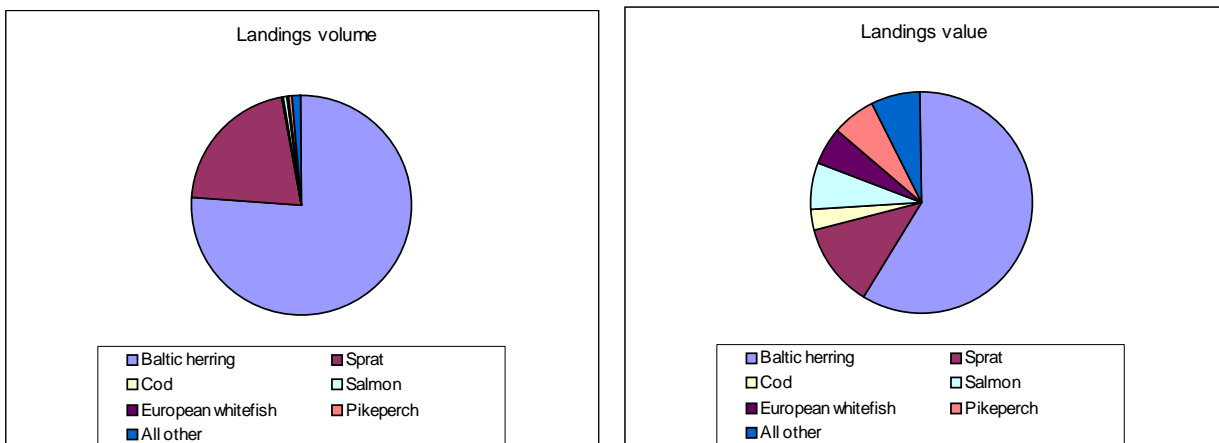
Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	20.6
Gross value added (mln Euro)	10.5
Volume of production (1000 tonnes)	84.7
Number of engaged crew	408
Number of FTE	n.a.
Number of vessels	242

Composition of production by segment



Composition of production by species in 2005



Productivity and TAC dependence in 2005

Segment (gear/size)	Income / vessel (Euro)	Catch / year / vessel (tonnes)	Income /day (Euro)	GVA / day (Euro)	GVA / engaged crewman (Euro)	Crew share / engaged crewman (Euro)	TAC dependence (%)
Trawlers < 24m	74 759	732	3.9	2.1	23 042	13 530	98%
Trawlers > 24m	565 698	2 860	6.2	3.0	77 993	47 274	95%
Gillnets 12-24m	72 167	21	6.5	2.5	13 025	5 875	98%
Coastal vessels	37 805	30	3.0	1.6	14 684	1 907	22%

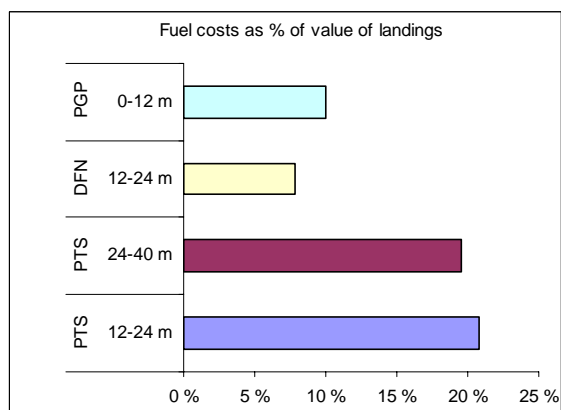
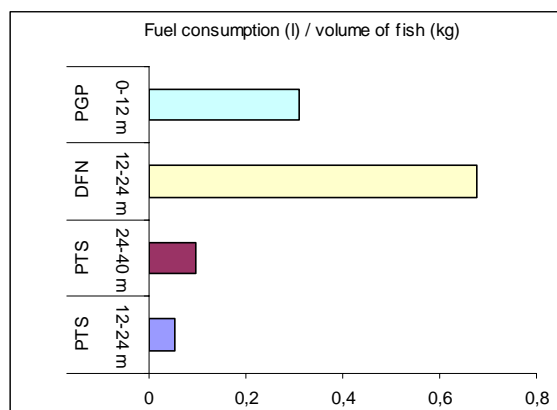
Change 2004-2005

Segment (gear/size)	Income / vessel (%)	Catch / year / vessel (%)	Income /day (%)	GVA / day (%)	GVA / engaged crewman (%)	Crew share / engaged crewman (%)
Trawlers < 24m	-6%	25%	-29%	-24%	5%	-10%
Trawlers > 24m	60%	51%	-9%	-7%	86%	49%
Gillnets 12-24m	-10%	-48%	1%	-4%	-9%	-31%
Coastal vessels	11%	-15%	12%	24%	34%	16%

Performance 2006

Segment (gear/size)	Landings (% change of 2005)	Effort (% of 2005)
Trawlers < 24m	+30%	+21%
Trawlers > 24m	-5%	-18%
Gillnets 12-24m	-5%	-13%
Coastal vessels	-38%	

Energy efficiency

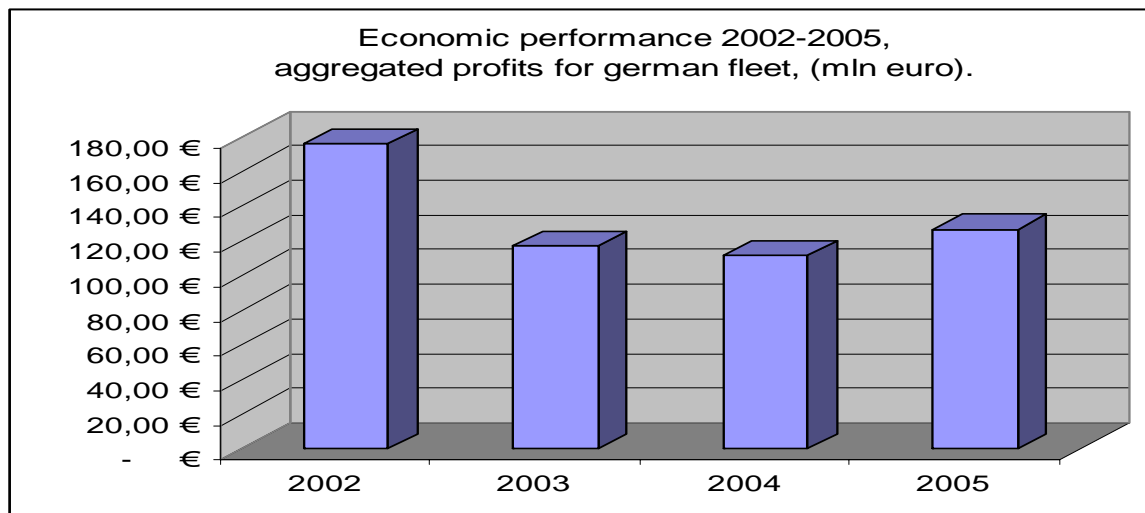


4.7. GERMANY

In 2005 national production amounted to 192 mln Euro. Economic data has been collected for Demersal trawlers and seiners 12–24 metres and Beam trawlers 12–24 metres, representing 25 % of the national value of landings.

Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	192.14
Value added (mln Euro)	n.a.
Volume of production (1 000 tonnes)	260.02
Number of engaged crew	n.a.
Number of FTE	n.a.
Number of vessels	2 205



Productivity and TAC dependence in 2005

Segment (gear/size)	Income / vessel (Euro)	Catch / year / vessel (tonnes)	Income /day (Euro)	GVA / day (Euro)	GVA / FTE (Euro)	Crew share / engaged crewman (Euro)
TBB 1224	125 301.7	52 727.61	867.09	171.5	15 321.35	27 697.8
DTS 1224	261 320.8	285 697.8	1 990.08	931.1	56 368.47	20 417.39

Change 2004-2005

Segment (gear/size)	Income / vessel (%)	Catch / year / vessel (%)	Income /day (%)	GVA / day (%)	GVA / FTE (%)	Crew share / engaged crewman (%)
TBB 1224	0.82	0.69	0.847	0.409	0.556	1.087
DTS 1224	1.43	1.41	1.48	2.74	3.15	0.99

4.8. GREECE

In 2005 national production amounted to 187.4 thousand tonnes, 948.8 mln Euro in value. Major segments are passive gears <12 m representing 49.8% of the national landings and 66.8% in value. Most important species is *Merluccius merluccius*, which accounts for 12% of the value of landings.

In 2005 the fleet generated income (gross value added) of 662.7 mln Euro. Net profit is estimated at 367.9 mln Euro. The best performance has been achieved by purse seiners 24-40 m, while pelagic seiners <12 m show the highest loss. The average crew share in all segments amounted to 99.7 million Euro or 28 434 Euro/fisherman.

In view of trends in landings we see a slight decrease in the total landing, equal to 6.6% in 2005 and 2.2% in 2006, while we see an increase in the total revenues, equal to 5.7% and 11.4% respectively. This is an indication of an increase in the fish price. The outlook for 2007 is expected in the same direction.

All the figures in the tables below apply to the active vessels only. A vessel is treated as active if it displays activity at least one day per year.

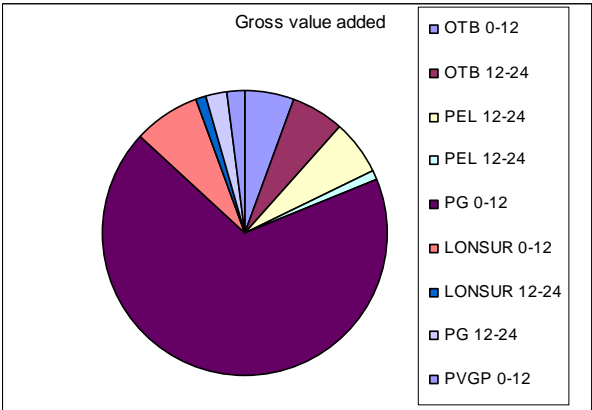
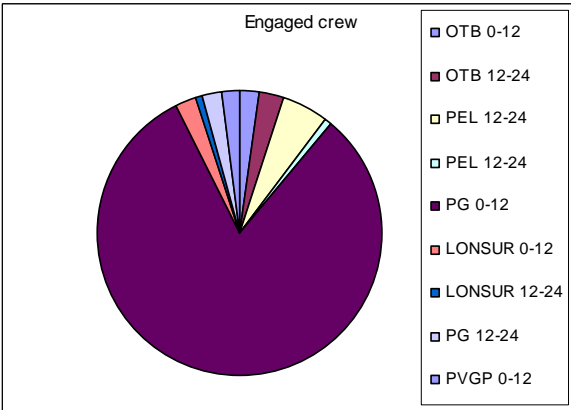
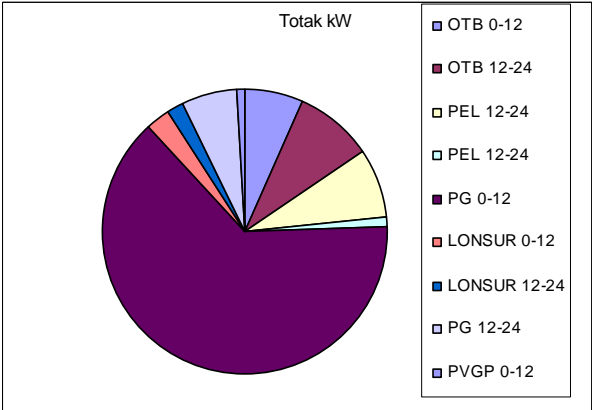
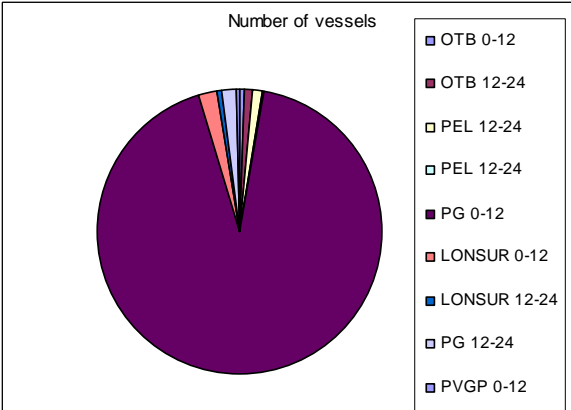
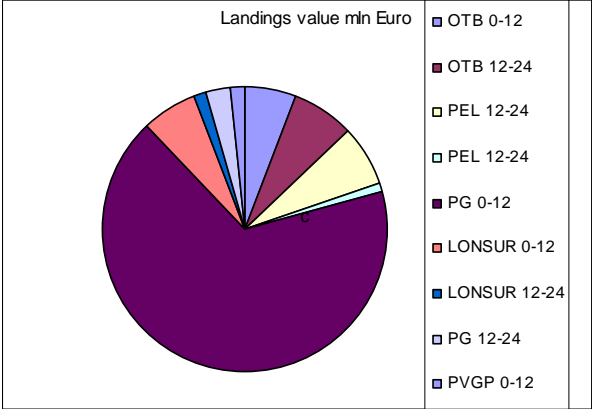
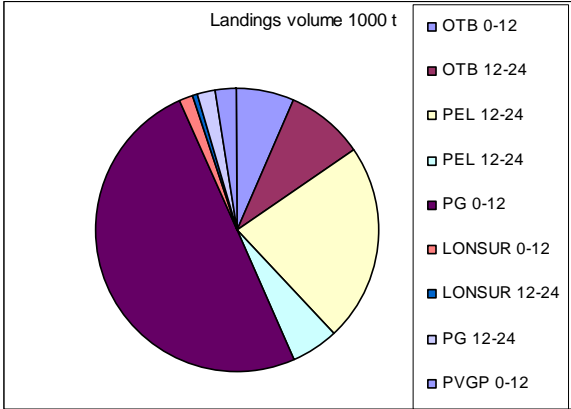
Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	948.8
Value added (mln Euro)	662.7
Volume of production (1 000 tonnes)	187.4
Number of engaged crew	33 368
Number of vessels	17 255

Productivity in 2005

Segment (gear/size)	Gross revenues / vessel (Euro)	Catch / year / vessel (tonnes)	Gross revenues /kW-day (Euro)	GVA / kW-day (Euro)	GVA / FTE (Euro)	Crew share / engaged crewman (Euro)
OTB 0-12	493 308	109 962	6.3	4.0	N.A.	9 968
OTB 12-24	516 410	129 469	6.2	3.9	N.A.	9 532
PEL 12-24	317 955	202 981	7.3	4.4	N.A.	6 840
PEL 12-24	548 328	504 672	6.9	4.5	N.A.	6 547
PG 0-12	40 209	5 926	5.7	4.1	N.A.	2 066
LONSUR 0-12	162 925	8 206	22.2	18.6	N.A.	6 079
LONSUR 12-24	171 432	15 403	13.5	6.8	N.A.	12 994
PG 12-24	80 696	11 549	3.1	2.1	N.A.	3 351
PMP 0-12	472 614	127 181	7.5	5.6	N.A.	3 650
PMP 12-24	8 020	3 603	2.6	1.8	N.A.	3 689

Composition of production by segment



Change 2004-2005

Segment (gear/size)	Gross revenues / vessel (%)	Catch / year / vessel (%)	Gross revenues /kW-day (%)	GVA / kW-day (%)	GVA / FTE (%)	Crew share / engaged crewman (%)
OTB 0-12	37.67%	-3.77%	39.72%	61.88%	N.A.	3.01%
OTB 12-24	14.78%	3.97%	15.37%	59.13%	N.A.	-2.30%
PEL 12-24	-11.26%	11.91%	-12.97%	-9.23%	N.A.	-11.46%
PEL 12-24	20.11%	11.52%	3.86%	19.24%	N.A.	-6.56%
PG 0-12	1.28%	-19.55%	4.68%	4.62%	N.A.	52.09%
LONSUR 0-12	36.63%	-14.88%	62.28%	64.85%	N.A.	31.10%
LONSUR 12-24	-10.19%	-22.35%	-25.98%	-39.93%	N.A.	11.96%
PG 12-24	-37.11%	-36.56%	-22.13%	-32.03%	N.A.	34.02%
PMP 0-12	2.51%	-33.07%	3.44%	8.44%	N.A.	31.39%
PMP 12-24	1.22%	-4.04%	-12.36%	17.44%	N.A.	-212.64%

Performance 2006

Segment (gear/size)	TAC (1000t)	Landings (1000t)	Average fish price (Euro/t)	Income (mln Euro)	Effort (% of 2005)	Fuel costs (mln Euro)	Total costs (mln Euro)
OTB		8.8	N.A.	37.2	-17.80%	8.1	23.5
OTB		17.8	N.A.	118.2	4.13%	13.1	38.0
PEL		0.0	N.A.	0.0		0.0	0.0
PEL		44.1	N.A.	84.8	-12.51%	5.7	33.0
PEL		10.0	N.A.	14.9	2.36%	1.0	5.1
PG		85.3	N.A.	639.3	-6.46%	56.5	222.2
LONSUR		6.0	N.A.	96.9	-27.44%	3.7	17.4
LONSUR		2.9	N.A.	48.2	30.82%	2.7	21.0
PG		2.9	N.A.	12.7	29.17%	2.0	10.5
PMP		4.5	N.A.	15.2	-9.90%	0.8	8.0

4.9. ITALY

In 2005 national production amounted to 1 413 mln Euro. Major segments are demersal trawl (OTB) 12-24 m and 24-40 m, polyvalent passive gears (PGP) <12 m and pelagic trawls and seiners (PTS) 12-24 m, representing 78% of the national value of landings. Most important species are anchovy, hake, striped venus, shrimp and pilchard, which account for 27% of the value of landings.

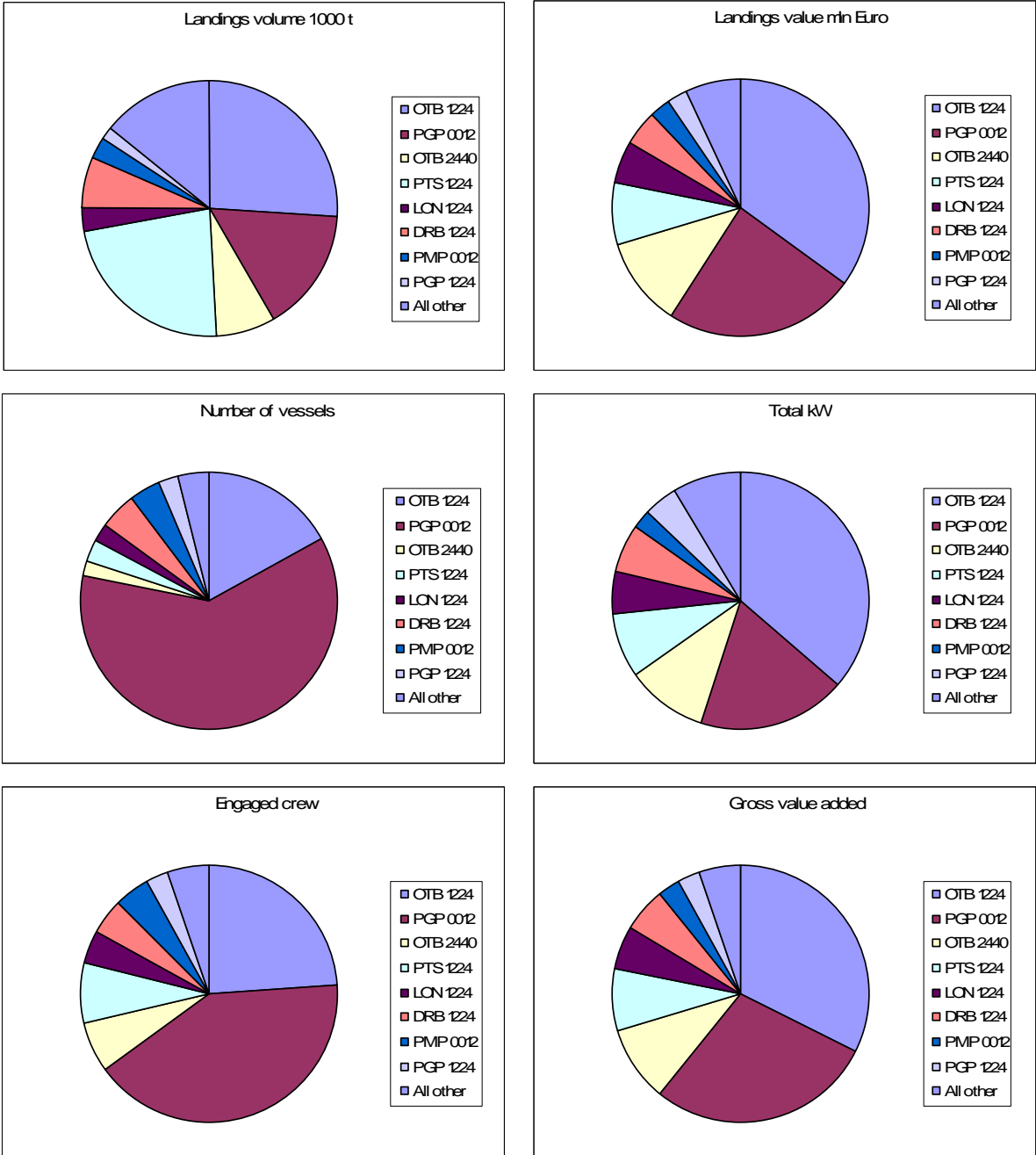
In 2005 the fleet generated income (gross value added) of 873 mln Euro. Net profit is estimated at 376 mln Euro. The best performance, in terms of average net profit, has been achieved by the demersal trawlers (OTB) and the pelagic segments (PTS), while polyvalent

vessels using passive gears (PGP) show the worst performance. In view of trends in landings/prices and fuel costs, the performance in 2006 has probably been worse than in 2005.

Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	1 412.9
Value added (mln Euro)	873.4
Volume of production (1 000 tonnes)	282.0
Number of engaged crew	32 174
Number of vessels	15 112

Composition of production by segment



Productivity and TAC dependence in 2005

Segment (gear/size)	Income / vessel (Euro)	Catch / year / vessel (tonnes)	Income /day (Euro)	GVA / day (Euro)	GVA / FTE (Euro)	Crew share / engaged crewman (Euro)	TAC dependence (%) *
OTB <12m	78 191	16.8	613.7	259.7		8 802.4	
OTB 12-24 m	192 706	28.6	1 229.7	683.1		17 549.9	
OTB 24-40 m	495 187	65.4	2 579.3	1 309.1		18 804.5	
OTB >40 m	715 361	205.3	6 675.6	n.a.			
TBB 12-24 m	183 428	33.8	1 210.7	609.7		12 644.3	
TBB 24-40 m	279 883	34.6	2 146.9	1 225.1		21 582.7	
PTS 12-24 m	276 288	163.6	2 375.9	1 437.5		13 212.3	9%
PTS 24-40 m	419 099	309.4	3 091.1	2 160.5		20 543.5	4%
PTS >40 m	6 623 927	8 500.4	40 888.4	n.a.			
DRB 12-24 m	87 296	24.9	971.7	721.2		14 481.1	
PGP <12 m	36 790	4.8	283.8	201.4		7 959.5	
PGP 12-24 m	93 243	12.4	760.5	482.9		10 909.2	
PMP <12 m	69 726	13.7	476.9	303.9		9 073.3	
PMP 12-24 m	136 422	16.9	1 211.8	826.1		11 546.9	
LON <12 m	55 139	6.0	360.5	209.3		7 732.3	
LON 12-24 m	206 455	24.3	1 610.1	1 038.2		14 820.4	

*Approximate share of TAC species in the Income

Change 2004-2005

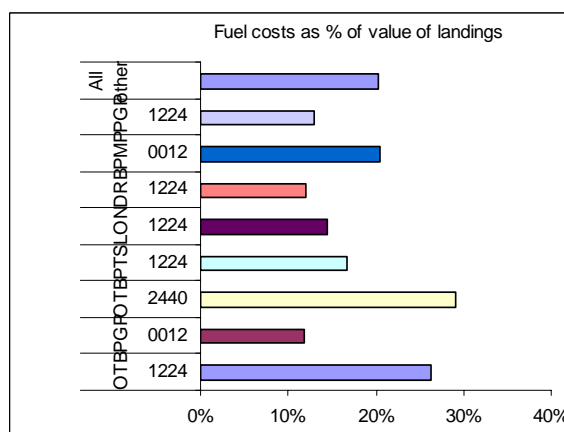
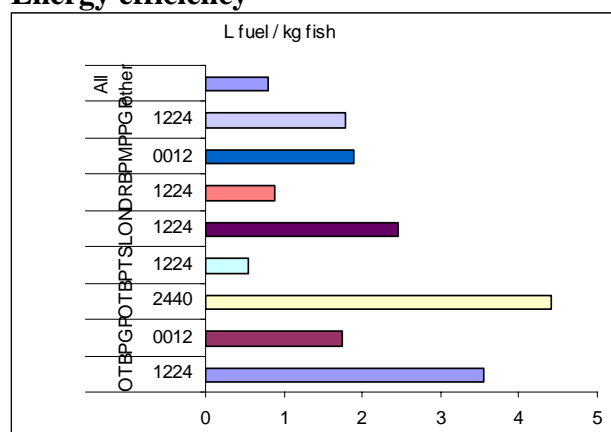
Segment (gear/size)	Income / vessel (%)	Catch / year / vessel (%)	Income /day (%)	GVA / day (%)	Crew share / engaged crewman (%)
OTB <12m	-9%	26%	7%	20%	-27%
OTB 12-24 m	11%	-3%	9%	17%	2%
OTB 24-40 m	20%	8%	15%	15%	3%
OTB >40 m	-29%	-44%	7%	n.a.	
TBB 12-24 m	-19%	-6%	-22%	-18%	-28%
PTS 12-24 m	-13%	0%	-8%	-2%	-15%
PTS 24-40 m	-15%	-15%	-21%	-30%	2%
PTS >40 m	-27%	-28%	9%	n.a.	
DRB 12-24 m	-23%	-24%	-15%	-16%	-24%
PGP <12 m	1%	-6%	10%	18%	29%
PGP 12-24 m	25%	13%	53%	58%	35%
PMP <12 m	18%	42%	5%	6%	11%
PMP 12-24 m	3%	-19%	18%	14%	11%
LON <12 m	-21%	-25%	-24%	-29%	-25%
LON 12-24 m	10%	17%	-76%	-78%	20%

Performance 2006*

Segment (gear/size)	TAC (1000t)	Landings (1000t)	Average fish price (Euro/t)	Income (mln Euro)	Effort (1000 days)	Fuel costs (mln Euro)	Total costs (mln Euro)
OTB <12m		2 146.6	5.81	12.47	13.0	2.8	7.1
OTB 12-24 m		74 360.7	7.16	532.31	378.9	133.1	380.8
OTB 24-40 m		17 693.5	9.42	166.63	58.0	47.1	126.0
OTB >40 m		3 656.5	3.61	13.20	2.5	n.a.	n.a.
TBB 12-24 m		2 598.6	4.41	11.46	12.8	5.5	10.4
TBB 24-40 m		1 153.8	7.55	8.71	2.2	1.3	3.2
PTS 12-24 m		58 882.8	2.10	123.38	45.6	19.6	79.9
PTS 24-40 m		28 701.2	1.75	50.19	8.2	3.2	18.6
PTS >40 m		5 950.8	0.98	5.83	0.16	n.a.	n.a.
DRB 12-24 m		17 847.8	3.00	53.60	74.9	9.5	39.5
PGP <12 m		49 330.7	8.01	395.25	1324.0	47.8	217.4
PGP 12-24 m		5 650.8	7.46	42.14	51.0	5.4	24.6
PMP 12-24 m		2 406.2	4.38	10.55	3.1	0.3	6.1
LON <12 m		479.7	7.24	3.47	32.1	2.9	9.6
LON 12-24 m		8 015.9	8.06	64.57	40.6	10.2	48.7

*Preliminary data estimated on the first nine months of 2006

Energy efficiency



In 2004, a methodological revision occurred in the IREPA survey. This revision mainly regarded the stratification of the fleet in the segments required by the DCR (appendix III). In particular, in 2002 and 2003 a field survey was carried out to identify the prevalent fishing activity of the vessels authorized to use more than one gear. Therefore, the time series from 2002 to 2005 are not homogenous for several segments. A coherent analysis can be carried out starting from 2004 onwards.

To be consistent from a statistical point of view, capacity data reported in the tables are derived from the fleet used to extract the sample and to raise the sample figures. In this way, average values in terms of number of vessels or size can be calculated. In case a segment contains less than ten vessels, it has been merged with a neighbouring length category as specified in the National Program.

In Italy, the beam trawls (TBB) in the strict sense do not exist. We classified “beam” trawl as the so-called “rapido”, which is a kind of bottom trawl used mainly for flatfish. This segment

has been introduced in 2004, as a specification of the demersal trawls. In 2004, no distinction was made according to the LOA, while from 2005 a distinction according to length classes was introduced. Mediterranean pelagic trawl and seiners (PTS) > 40 m is a very small segment. Number of vessels decreased over time and they have been aggregated in the 24-40 LOA classes from 2004 onwards. At this moment only pelagic vessels fishing outside the Mediterranean waters are included in this segment.

Pelagic trawl and seiners (PTS) < 12 m is also a very small segment. Number of vessels in this segment decreased over time and they have been aggregated in the 12-24 LOA class. Long liners (LON) were classified in the polyvalent passive vessels before 2004. Passive polyvalent (PGP) 12-24 are not present in 2002 because they were classified in the polyvalent mobile + passive gears.

4.10. LITHUANIA

In 2005 national production amounted to almost 54.3 mln Euro. The Lithuanian fleet is fishing in the Baltic Sea and Atlantic Ocean. The major segment is Trawlers > 40 m length, representing 90.6% of the national value of landings. Most important species of this segment are horse mackerel, mackerel, shrimp, sardinella and redfish, which account for 95.5% of the value of landings. The major segment in the Baltic Sea is Demersal trawl¹, representing almost 70% of Lithuanian value of landings in the Baltic Sea, or 7.6% of the national value of landings. Most important species of this segment are cod and plaice, which account for 89.1% of the value of landings.

In 2005 the fleet generated gross value added of 13 mln Euro. Net profit is estimated at 3 mln Euro. The best performance has been achieved by Drift and fixed nets 12-40 segment. The other segments were also profitable in 2005. The average crew share in this segment amounted to almost 9 500 Euro/crewman. The best productivity of manpower was achieved by high seas Trawlers >40 m – about 30 000 Euro/crewman.

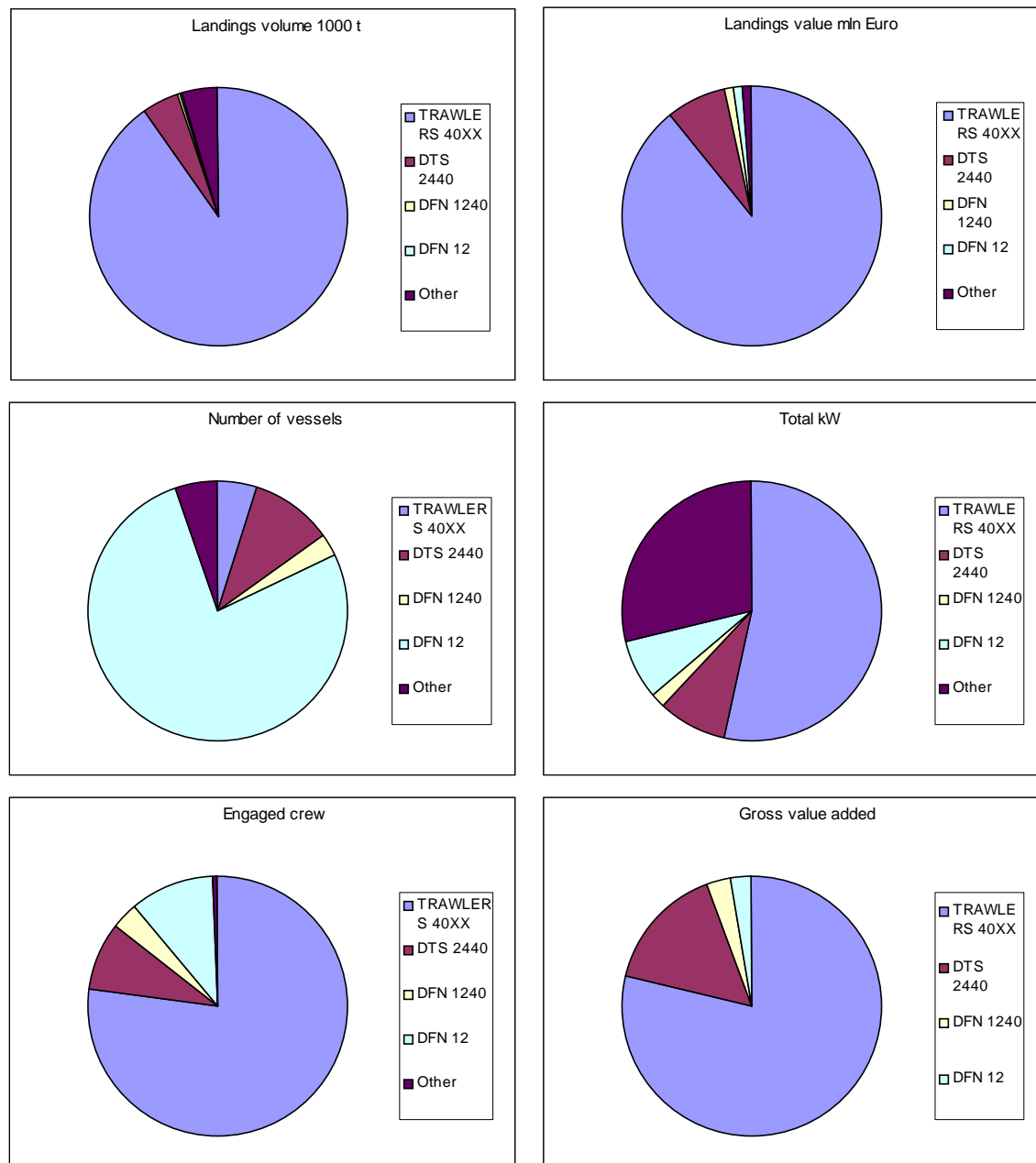
The main changes in the economic performance of the Baltic Sea segments (Demersal trawl 24-40 and Drift and fixed nets 12-40) were due to permanent cessation of some vessels fishing in the Baltic Sea (20 vessels were scrapped in 2005) and better fishing opportunities for fishermen as a result. On the other hand the increase in fuel price had a negative impact on the Demersal trawl 24-40 segment. The fuel costs per fishing day of the Demersal trawl 24-40 segment increased by more than 20%. In view of trends, TACs and the permanent cessation of some more vessels, the performance in 2006 has probably been better than in 2005. The outlook for 2007 is rather favourable. Economic data refer to 273 vessels of the four main segments.

Basic data total national fleet, 2005

Indicator	Value
Value of production (mln Euro)	53.6
Gross value added (mln Euro)	13.0
Volume of production (1000 tonnes)	132.1
Number of engaged crew	2 070
Number of vessels	273

¹ There are no seiners classified in the Demersal trawl and seiner segment.

Composition of production by segment



Productivity and TAC dependence in 2005

Segment (gear/size)	Gross revenues / vessel (Euro)	Catch / year / vessel (tonnes)	Gross revenues /day (Euro)	GVA / day (Euro)	GVA / engaged crewman (Euro)	Crew share / engaged crewman (Euro)	TAC dependence (%) *
Trawlers 40XX	3 458 349	8 906.5	n.a.	n.a.	6 417	3 276	n.a.**
DTS 2440	136 730	217.0	998.0	498.2	11 312	6 162	86
DFN 1240	79 302	57.2	899.9	600.2	6 315	3 058	100
DFN 0012	2 174	1.9	83.5	54.1	1 401	1 126	42

* Approximate share of TAC species in the gross revenues

** Vessels fishing in some areas are not dependent on TAC, they are restricted by licenses

Change 2004-2005

Segment (gear/size)	Gross revenues / vessel (%)	Catch / year / vessel (%)	Gross revenues / day (%)	GVA / day (%)	GVA / engaged crewman (%)	Crew share / engaged crewman (%)
Trawlers 40XX	35	12	n.a.	n.a.	12	5
DTS 2440	27	-26	52	14	-12	129
DFN 1240	52	33	34	232	148	-22
DFN 0012	4	-40	-16	-7	80	246

Performance 2006

Segment (gear/size)	Landings of TAC species (1 000t)	Landings (1 000t)	Average fish price (Euro/t)**	Gross revenues (mln Euro)	Effort (% of 2005)	Fuel costs (mln Euro)	Total costs (mln Euro)
Trawlers 40XX	n.a.*	134.6	388	52.3			
DTS 2440	3.2	3.6	1 031***	3.7	-32	0.7	2.7
DFN 1240	0.4	0.4	1 386	0.6	-36	0.1	0.4
DFN 0012	0.1	0.4	1 165	0.5			

* Vessels fishing in some areas are not dependent on TAC, they are restricted by licenses

** The average prices in 2005

*** Recalculated according to the landings by species structure in 2006

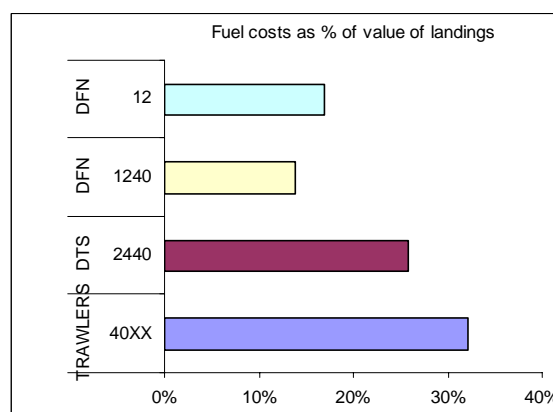
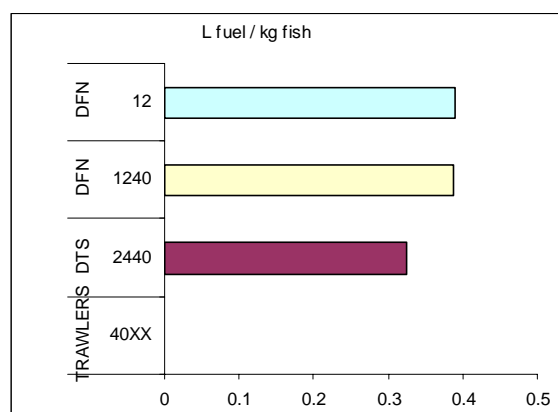
Outlook 2007

Segment (gear/size)	TAC (1 000t)	TAC 2007 / TAC 2005	Estimated change in income 2007/2005**	Capacity change (kW) 2007/2005 (% of 2005)
Trawlers 40XX	n.a.*			
DTS 2440	4.5	1.4	120.4	-22
DFN 1240	0.4	0.9	90	-22
DFN 0012	0.1	1.3	54.6	-2

* Vessels fishing in some areas are not dependent on TAC, they are restricted by licenses

** Estimate change in income = (TAC 2007 / TAC 2005) * TAC dependence rate

Energy efficiency



4.11. THE NETHERLANDS

In 2005 national production amounted to 380 mln Euro. Major segments are beam trawl 12-24 metres and over 40 metres, and pelagic trawls and seiners over 40 metres, representing 81% of the national value of landings. Most important species are herring, blue whiting, sole, horse mackerel, sardinella, plaice, shrimp, mackerel and pilchard, which account for 88% of the value of landings.

In 2005 the fleet generated income (gross value added) of 146 mln Euro. Net loss is estimated at 12 mln Euro. The best performance has been achieved by pelagic trawls and seiners over 40 metres, while the beam trawlers over 40 metres show the highest loss. The average crew share in these segments amounted to 60 500 and 43 000 Euro/FTE respectively.

In view of trends in landings / TACs / prices and fuel costs, the performance in 2006 has probably been the same as in 2005. The outlook for 2007 is less favourable.

The data presented in this chapter refer to the active fleet only. Vessels are considered active if the value of landings is above 50 000 Euro. Data about the less active fleet can be found in the statistical appendix.

Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	379.5
Value added (mln Euro)	146.9
Volume of production (1 000 tonnes)	544.8
Number of FTE	2 051
Number of vessels	389

Productivity and TAC dependence in 2005

Segment (gear/size)	Income / vessel (Euro)	Catch / vessel (tonnes)	Income /day (Euro)	GVA / day (Euro)	GVA / FTE (Euro)	Crew share / FTE (Euro)	TAC dependence (%) *
DTS /VL1224	504 861	159	3 305	1 251	58 625	43 959	75.8
DTS /VL2440	802 584	334	5 347	2 506	81 053	51 241	56.0
PTS / VL40XX	8 187 500	29 438	31 081	14 500	104 117	60 483	74.4
TBB / VL1224	281 117	107	2 266	1 283	54 519	40 969	27.9
TBB / VL2440	766 966	210	5 026	1 992	62 284	43 954	89.1
TBB / VL40XX	1 430 000	384	7 894	1 961	58 051	42 909	95.6

*Approximate share of TAC species in the Income

Change 2004-2005

Segment (gear/size)	Income / vessel (%)	Catch / vessel (%)	Income /day (%)	GVA / day (%)	GVA / FTE (%)	Crew share / FTE (%)
DTS /VL1224	16.1	4.5	8.1	1.4	10.2	9.8
DTS /VL2440	-1.6	17.5	5.9	55.4	40.4	15.1
PTS / VL40XX	6.2	13.2	10.7	30.1	22.8	6.9
TBB / VL1224	17.3	3.7	18.3	14.7	13.4	11.9
TBB / VL2440	1.6	-6.3	0.3	-19.0	-15.2	-6.2
TBB / VL40XX	6.5	-3.6	-1.1	-31.9	-26.4	-12.8

Composition of production by segment



Performance 2006

Segment (gear/size)	TAC* (1 000t)	Landings * (1 000t)	Average fish price (Euro/t)	Income (mln Euro)	Effort (% of 2005)	Fuel costs (mln Euro)	Total costs (mln Euro)
DTS VL1224		2	3 290	6	100	1	6
DTS VL2440		4	2 080	8	95	2	11
PTS VL40XX		395	330	132	85	20	126
TBB VL1224		18	2 600	47	100	13	51
TBB VL2440		10	3 530	36	95	20	38
TBB VL40XX		39	3 570	140	90	32	141

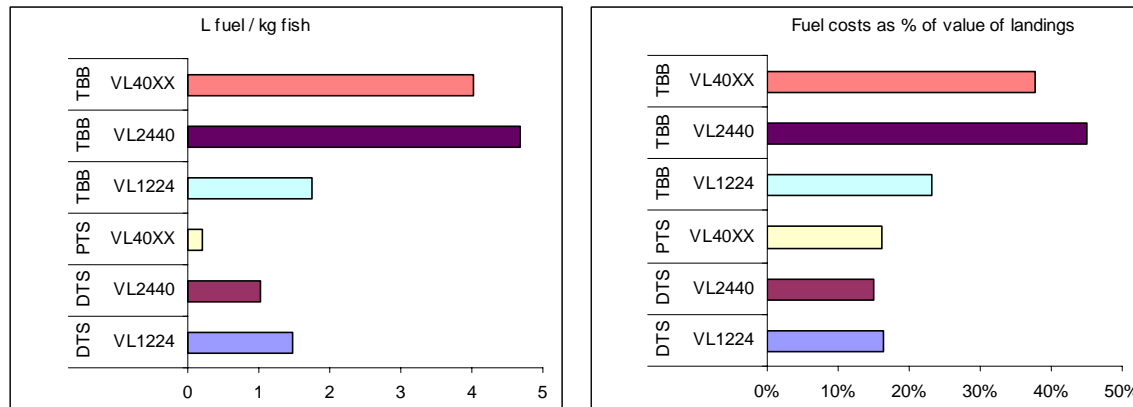
* Landings are based on preliminary figures and give a better representation of performance than aggregated data of the TAC.

Outlook 2007

Segment (gear/size)	TAC (1000t)	Estimated change in income TAC 2007 / TAC 2005*
DTS VL1224	1	90%
DTS VL2440	2	90%
PTS VL40XX	205	85%
TBB VL1224	3	85%
TBB VL2440	6	85%
TBB VL40XX	21	85%

* Estimate change in income = (TAC 2007 / TAC 2005) * TAC dependence rate

Energy efficiency



4.12. POLAND

In 2005 national production amounted to 38.9 mln Euro. Major segments are pelagic trawlers over 24m (PTS2440) and passive gear vessels under 12 m (PG0012), representing almost 60% of the national value of landings. Most important species are cod, sprat and herring, which account for 75% of the value of landings.

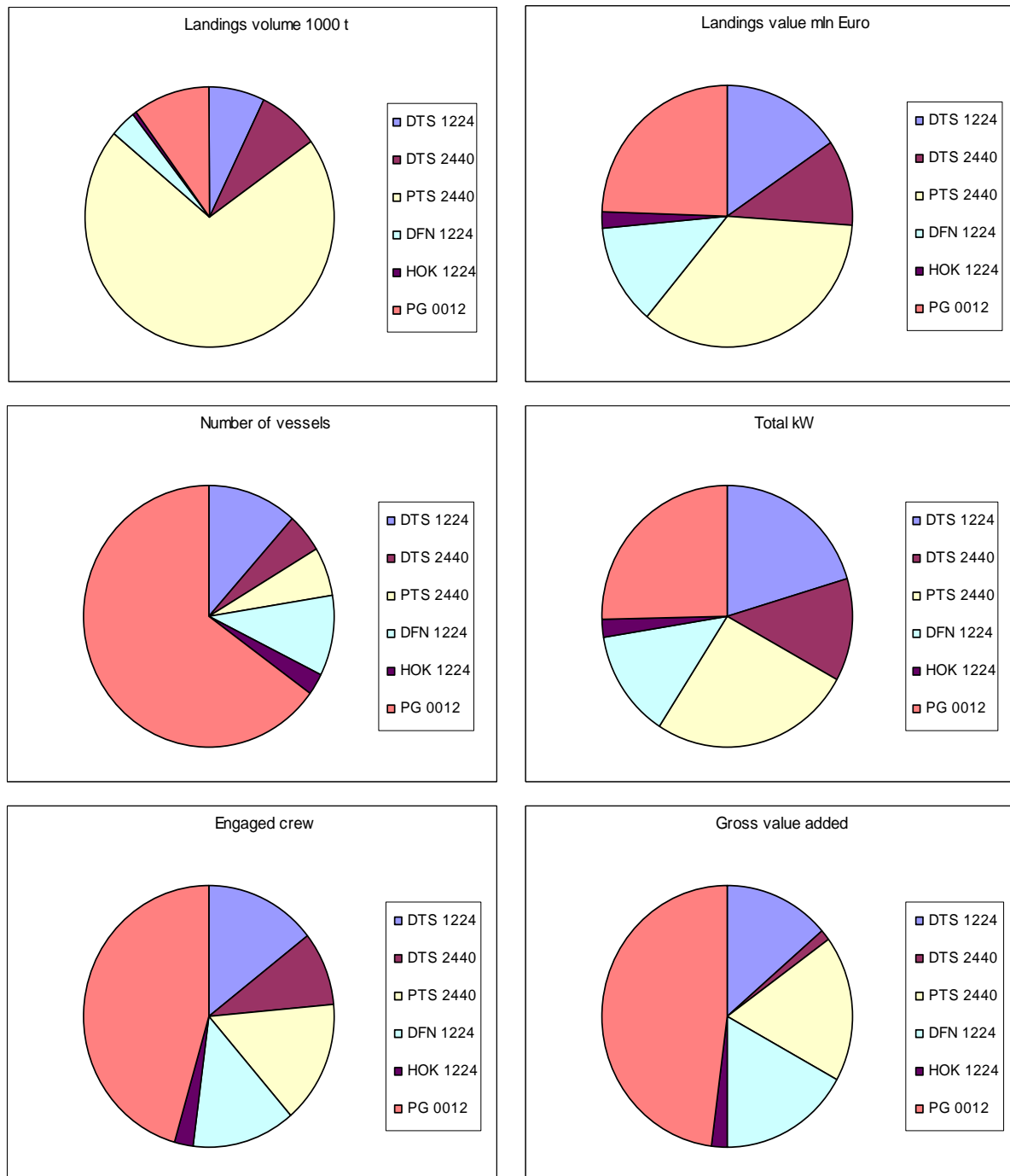
In 2005 the fleet generated income (gross value added) of 13.5 mln Euro. Net loss is estimated at 6.1 mln Euro. The best performance has been achieved by PG0012 segment (2.4 mln Euro), while PTS2440 shows the highest loss (-3.7 mln Euro). The average crew share in these segments amounted to 1 300 and 6 800 Euro/crewman respectively.

In view of trends in landings / TACs / prices and fuel costs, the performance in 2006 has probably been better than in 2005. It is expected that total costs will be lower and incomes 10% higher compared to 2005. Due to the lower cod TAC, the outlook for 2007 is less favourable, although this may be compensated by higher prices, which have been increasing steadily since the 3rd quarter of 2006. In 2007 the TAC for cod decreased by 10% and for salmon by 5%. Small pelagic 2007 quotas are 8% higher for sprat and 13% higher for herring. These may not be economic incentives for the pelagic segment since 2005 and 2006 TACs for these species were only 50-60% utilised.

Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	38.9
Value added (mln Euro)	13.5
Volume of production (1 000 tonnes)	124.3
Number of engaged crew	3 302
Number of FTE	3 079
Number of vessels	1 055

Composition of production by segment



Productivity and TAC dependence in 2005

Segment (gear/size)	Income / vessel (Euro)	Catch / year / vessel (tonnes)	Income /day (Euro)	GVA / day (Euro)	GVA / FTE (Euro)	Crew share / engaged crewman (Euro)	TAC dependence (%) *
DTS 1224	50 001.1	73.6	480.5	141.3	3 992.0	2 598.9	73%
DTS 2440	85 225.0	204.8	734.3	36.6	695.9	2 388.9	72%
PTS 2440	204 435.5	1 335.0	1 483.0	265.6	4 882.8	6 781.3	95%
DFN 1224	46 198.8	39.4	482.4	225.1	5 659.3	2 776.4	72%
HOK 1224	30 830.4	25.7	472.4	153.6	4 357.5	1 399.4	97%
PG 0012	13 711.0	18.3	132.9	91.4	4 716.6	1 298.7	51%

*Approximate share of TAC species in the Income

Change 2004-2005

Segment (gear/size)	Income / vessel (%)	Catch / year / vessel (%)	Income /day (%)	GVA / day (%)	GVA / FTE (%)	Crew share / engaged crewman (%)
DTS 1224	52%	28%	62%	59%	52%	44%
DTS 2440	113%	62%	129%	¹	¹	14%
PTS 2440	0%	-7%	14%	-37%	-49%	-2%
DFN 1224	34%	8%	58%	98%	106%	32%
HOK 1224	-14%	-35%	-3%	-42%	-25%	-65%
PG 0012	9%	-6%	17%	21%	12%	68%

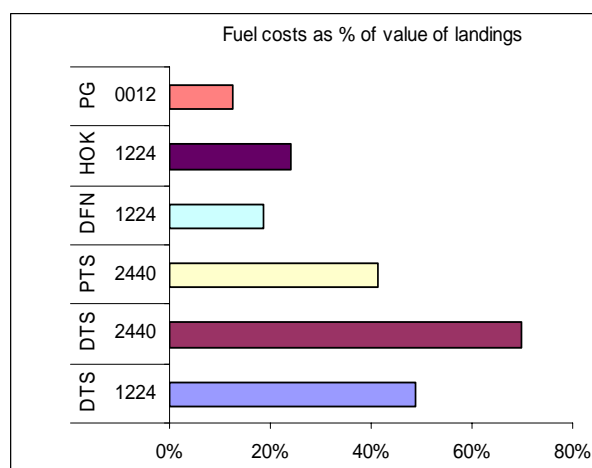
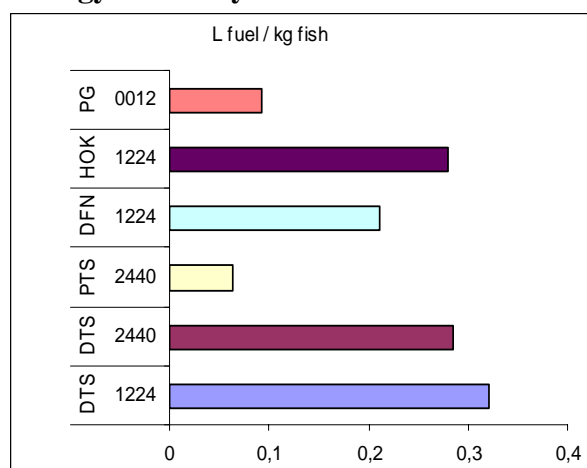
¹ Change from negative to positive figure in 2004.

Performance 2006 ¹

Segment (gear/size)	TAC (1 000t) ²	Landings (1 000t)	Average fish price (Euro/t)	Income (mln Euro)	Effort (% of 2005)	Fuel costs (mln Euro)	Total costs (mln Euro)
DTS 1224	4.8	7.6	871.2	6.6	-13%	2.9	7.0
DTS 2440	13.1	15.2	354.7	5.4	12%	3.6	7.8
PTS 2440	64.5	65.5	214.8	14.1	-25%	4.7	13.7
DFN 1224	2.3	3.3	1 513.0	5.0	-25%	0.8	4.5
HOK 1224	0.7	0.7	1 229.2	0.9	16%	0.2	1.0
PG 0012	6.4	12.6	871.6	11.0	-20%	1.1	6.8

¹ Preliminary or estimated data; ² Landings of TAC species

Energy efficiency



4.13. PORTUGAL (EXCLUDING AZORES AND MADEIRA)

In 2005 Portuguese Mainland production (fresh and refrigerated) amounted to 206 mln Euro. Major segments are Polyvalents (PVG VL0012, PVG VL1224), representing 60% of the national value of landings. Most important species are sardine, octopus and mackerel, which account for 38% of the value of landings. In 2005 the fleet generated income (provisional data, excluding Azores and Madeira) of 232 mln Euro.

Although the data for 2006 is not available yet, it is possible to assume that the economic performance of the fleet for this year was not better than in 2005. This assumption is supported by the fact that not only has the total quota for 2006 decreased significantly, by almost 29%, but also the price of the fuel has been one of the major constraints.

The outlook for 2007 seems to be similar to 2006, due to the fact that the decrease in the total quota was around 4%. However, it is important to point out that one of the variables that could change this assumption is the price of fuel.

Basic data total Mainland fleet, 2005

Indicator	Value
Income (mln Euro)	232
Gross value added (mln Euro)	127
Volume of production (1 000 tonnes)	159 558
Number of engaged crew	14 750
Number of licensed vessels	4 360

Productivity and TAC dependence in 2005, for Mainland

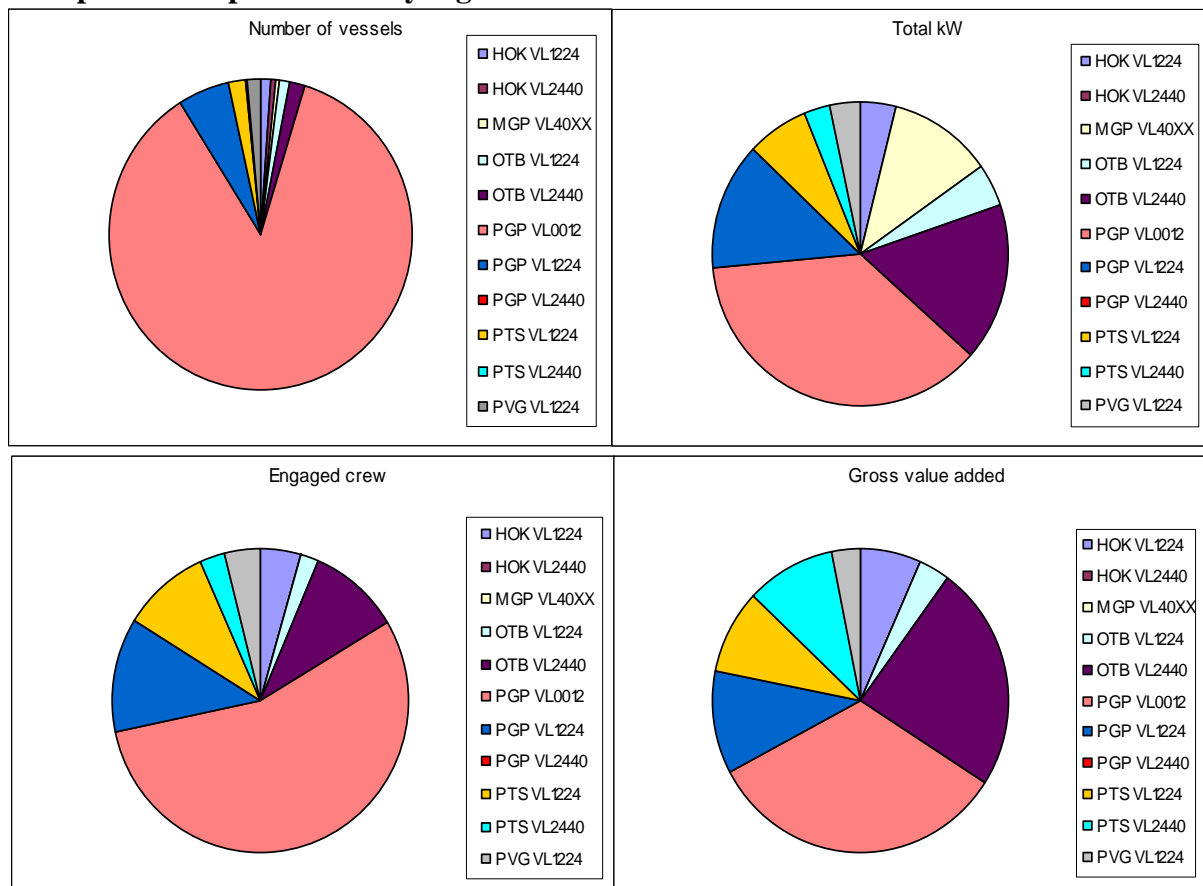
Segment (gear/size)	Income / vessel (Euro)	Crew share / engaged crewman (Euro)
HOK / VL1224	367 923	9 874.341
HOK / VL2440	N.A.	N.A.
MGP / VL40XX	N.A.	N.A.
OTB / VL1224	189 131	13 009.66
OTB / VL2440	879 962	15 515.89
PGP / VL0012	16 555	3 835.605
PGP / VL1224	142 304	7 642.919
PGP / VL2440	N.A.	N.A.
PTS / VL1224	309 710	8 182.091
PTS / VL2440	1 063 464	26 607.37
PVG / VL1224	124 613	5 064.848
PGP / VL2440	--	--

*Approximate share of TAC species in the Income

Change 2004-2005, for Mainland

Segment (gear/size)	Income / vessel (%)	Crew share / engaged crewman (%)
HOK / VL1224	-17.17	-13.42
HOK / VL2440	N.A.	N.A.
MGP / VL40XX	N.A.	N.A.
OTB / VL1224	28.47	5.54
OTB / VL2440	2.44	-8.15
PGP / VL0012	-13.57	6.40
PGP / VL1224	-30.37	2.49
PGP / VL2440	N.A.	N.A.
PTS / VL1224	0.74	9.18
PTS / VL2440	76.38	226.13
PVG / VL1224	-56.75	-43.75
PVG / VL2440	--	--

Composition of production by segment for Mainland fleet



4.14. SPAIN

In 2005 national production amounted to 1 929 mln Euro. Major segments are purse seiners more than 40m long and long-liners more than 40m long, representing 20% of the national value of landings. Most important species are skipjack, swordfish, hake and yellowfin which account for 35% of the value of landings.

In 2005 the fleet generated income (gross value added) of 0.557 mln Euro. Net loss is estimated at 0.047 mln Euro. The best performance has been achieved by the fixed nets (0-12m) while trawlers (24-40m) show the highest loss. The average crew share in this segment amounted to 11 906 Euro/crewman.

In view of trends in fuel costs, the performance in 2006 has probably worsened since 2005.

Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	1 928
Value added (mln Euro)	0.579
Volume of production (1 000 tonnes)	482
Number of engaged crew	N.A.
Number of FTE	42 890
Number of vessels	13 076

Productivity and TAC dependence in 2005

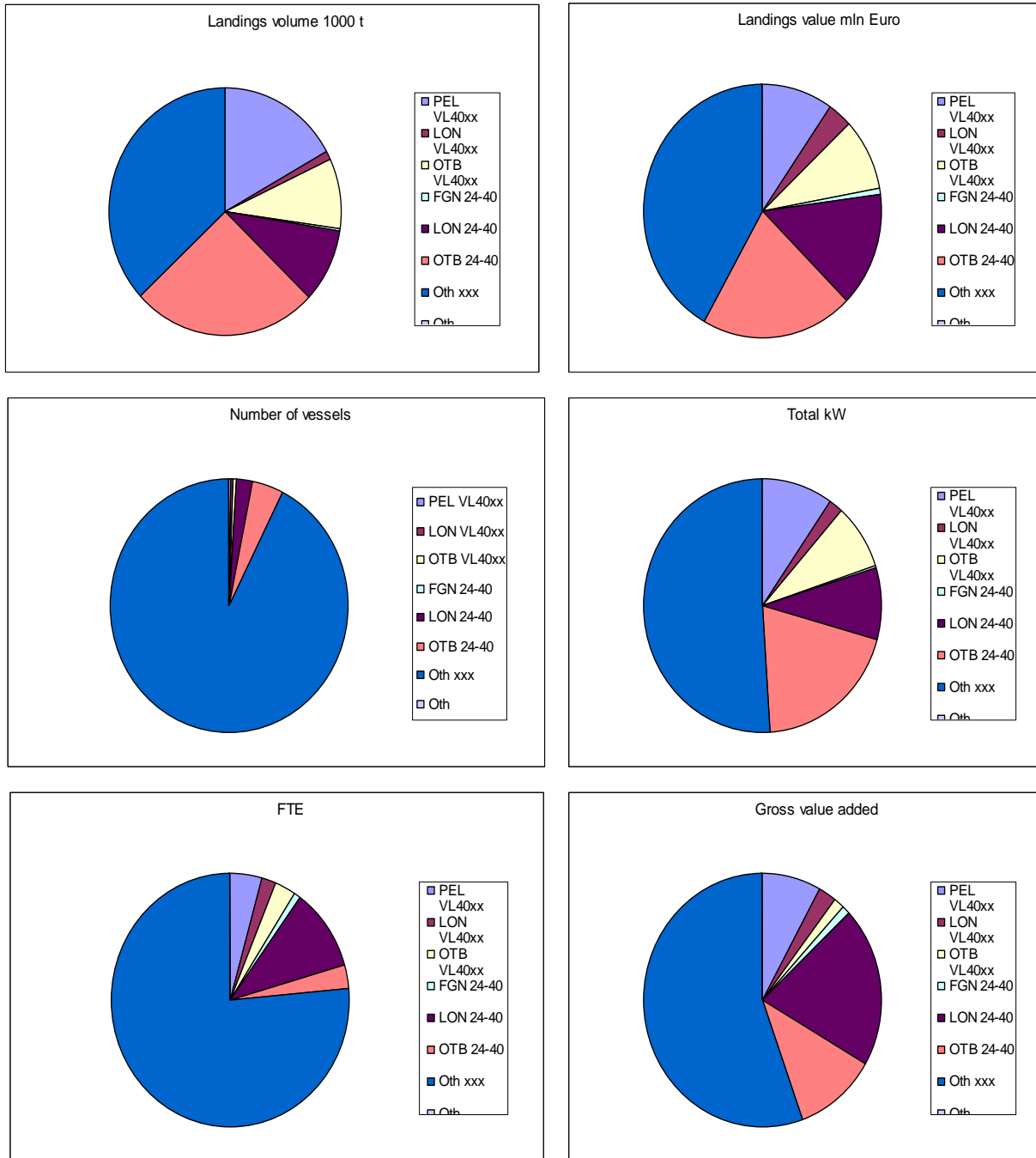
Segment (gear/size)	Income / vessel (Euro)	Catch / year / vessel (tonnes)	Income /vessel (Euro)	GVA / vessel (Euro)	GVA / FTE (Euro)	Crew share / FTE (Euro)	TAC dependence (%) *
Purse seiners (>40m)	5 588 811	N.A.	N.A.	1 328 237	23 395	20 970	52%
Long-liners (>40m)	2 243 994	N.A.	N.A.	472 399	16 597	10 512	85%
Trawlers (>40m)	2 120 281	N.A.	N.A.	93 119	1 304	10 563	85%
Polyvalent (24-40)	1 309 511	N.A.	N.A.	483 487	17 985	24 082	65%
Long-liners (24-40m)	1 066 779	N.A.	N.A.	432 709	24 790	17 152	83%
Trawlers (24-40m)	717 159	N.A.	N.A.	112 335	95 109	48 722	65%

*Approximate share of TAC species in the Income

Change 2004-2005

Segment (gear/size)	GVA / vessel (%)
Purse seiners (>40m)	18%
Long-liners (>40m)	15%
Trawlers (>40m)	60%
Polyvalent (24-40)	11%
Long-liners (24-40m)	9%
Trawlers (24-40m)	32%

Composition of production by segment



Spain has provided data on capacity, effort, costs and income and landings for 2004. But for 2005, no data on costs and earnings have been provided. Effort data has been provided but cannot be attributed precisely to a given section.

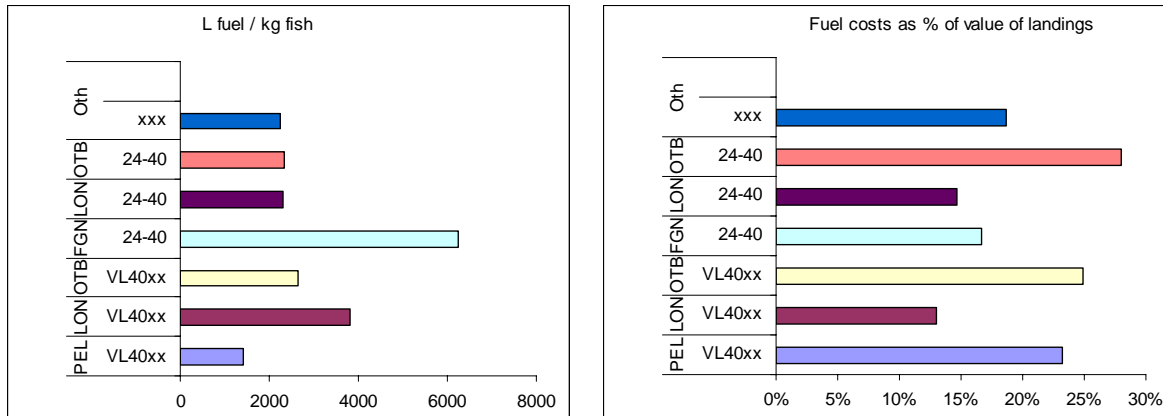
Hence, in order to obtain an outlook for 2005 some assumptions have been made:

- For value of landings we took into account prices of species of other countries, when possible, or an average price (2.76€/kg) when there was no available price of the species.

- Costs have not been changed, except the fuel cost for which, based on observed data, an increase (in real terms) of 36% has been assumed. Consumption of fuel in volume is not available.

All the registered fleet vessels are taken into account.

Energy efficiency



4.15. SWEDEN

In 2005 national production amounted to 96 mln Euro. Major segments are pelagic trawl and seiners 24 to 40 metres, pelagic trawl and seiners 40 metres or larger, demersal trawl and seiners 12 to 24 metres, demersal trawl and seiners 24 to 40 metres and passive gears less than 12 metres, representing 79% of the national value of landings. Most important species are herring, cod, sprat, northern shrimp and nephrops which account for 77% of the value of landings.

In 2005 the fleet generated income (gross value added) of 36 mln Euro. Net profit is estimated at 16 mln Euro. The best performance has been achieved by the large pelagic segments (40 metres or larger), while the segment using hooks (12 to 24 metres) shows the highest loss. The average crew share in the pelagic segment amounted to 16 111 Euro/crewman and in the hooks segment it amounted to 14 214 Euro/crewman.

Very many vessels are owned by a sole person and this is especially true for the smaller vessels. For these vessels the owner gets his/her crew share from the profit and the crew share cannot be disaggregated. For this reason the crew share is underestimated for most small segments. Changes between 2004 and 2005 for passive gears are left out since only cod vessels are included in the 2004 data and this is why the years are not comparable.

The impact of the change in the TAC and the extensive amount of stop days for cod in the Baltic is obvious when looking at the change in performance between 2004 and 2005 for the demersal segments (12-24 and 24-40). These vessels have not been able to compensate their losses, due to the increasing fuel cost and other variable costs, with other species or higher prices resulting in much lower gross value added.

The small demersal vessels (0-12 m) include vessels targeting vendace (roe) in the Gulf of Bothnia. They are therefore not as affected by the change of the TAC. Instead the gross value added increased for this segment during 2005. For the segment drift net and fixed nets the catch as well as the income has decreased. This is mostly due to the phasing out of driftnets. The

pelagic segment has benefited from a considerable increase in prices for sprat and herring, especially for the fresh market, resulting in better performance.

For 2006 the landings seem to have gone down but at the same time prices have increased significantly, resulting in increased gross revenue for almost all segments in 2006. The fuel price has risen by 18% which will generate greater fuel costs, but the performance in 2006 will probably be better than in 2005 due to the significant change in fish prices.

Data on segment level reflect only regularly active vessels earning more than 8 487 Euro. For the table below data refers to the total fleet, regularly active vessels as well as less active vessels.

Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	96
Value added (mln Euro)	36
Volume of production (1000 tonnes)	248
Number of engaged crew	2078
Number of vessels	1235

Productivity and TAC dependence in 2005

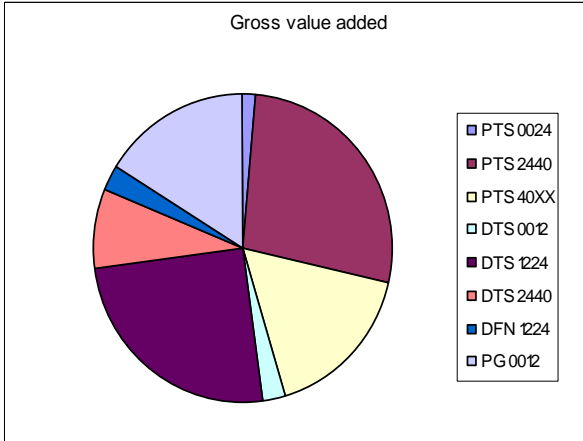
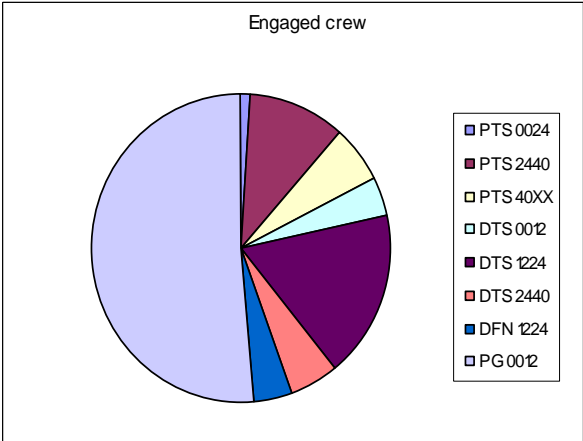
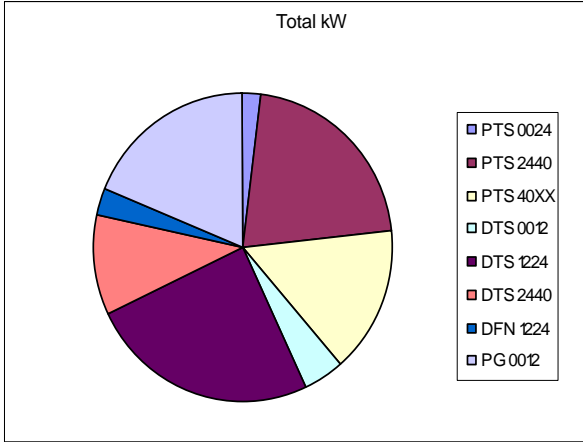
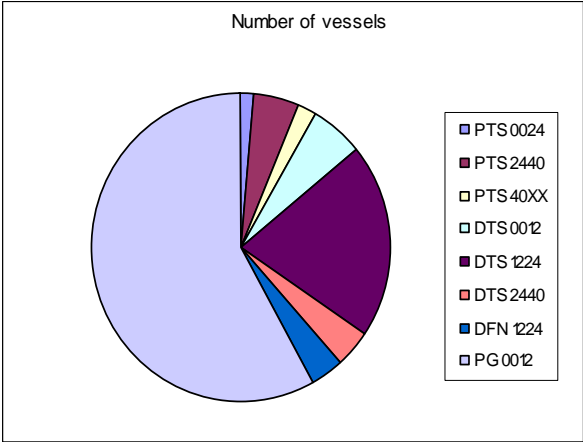
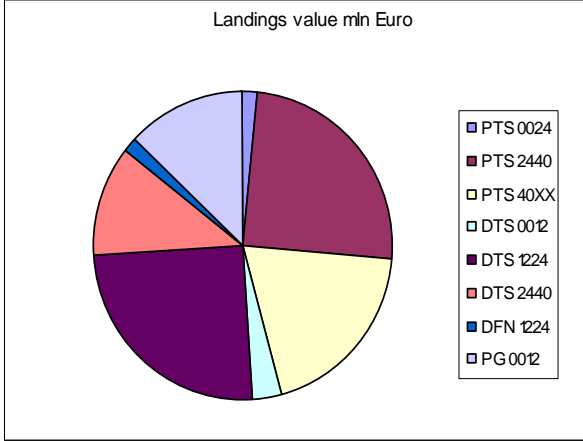
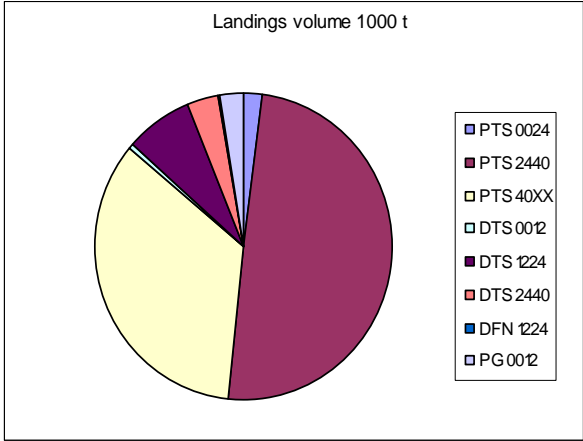
Segment (gear/size)	Gross revenues / vessel (Euro)	Catch / year / vessel (tonnes)	Gross revenues /day (Euro)	GVA / day (Euro)	Crew share / engaged crewman (Euro)	TAC dependence (%) *
PTS 0024	150 666	449	2 383	871	3 672	> 95
PTS 2440	621 008	3 315	3 784	1 613	19 048	> 95
PTS 40XX	1 306 480	6 082	5 623	1 831	16 111	> 95
DTS 0012	63 094	31	941	311	1 625	~ 50
DTS 1224	157 358	119	1 183	451	9 124	> 95
DTS 2440	358 251	265	1 955	556	15 716	> 95
DFN 1224	67 792	44	494	263	1 432	70>x>75
PG 0012	27 454	14	165	82	-	~ 50
HOK 1224	55 892	35	660	99	14 241	90>x>95

*Approximate share of TAC species in the gross revenues

Change 2004-2005

Segment (gear/size)	Income / vessel (%)	Catch / year / vessel (%)	Income /day (%)	GVA / day (%)	GVA / FTE (%)	Crew share / engaged crewman (%)
PTS 0040	12	-1	33	34		0.1
PTS 40XX	10	-14	11	52		-0.4
DTS 0012	88	138	128	63		-40.4
DTS 1224	4	-5	2	-16		-0.8
DTS 2440	1	6	8	-34		-0.7
DFN 1224	-10	-14	6	-18		1
PG 0012	-	-	-	-		-
HOK 1224	-	-	-	-		-

Composition of production by segment

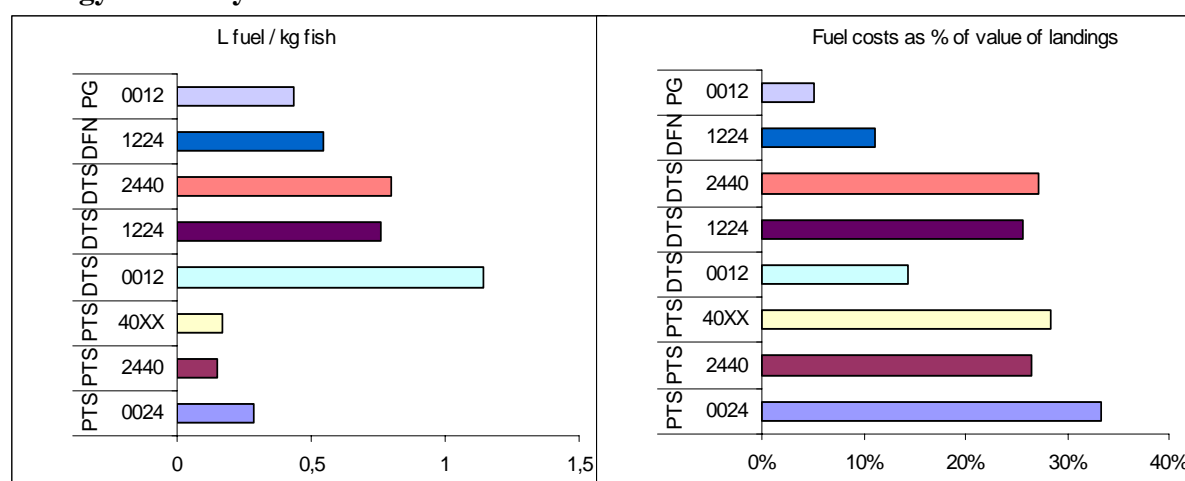


Performance 2006

Segment (gear/size)	Landings (1 000t)	Average fish price (Euro/t)	Income (mln Euro)
PTS 0024	4	412	2
PTS 2440	122	220	27
PTS 40XX	123	215	26
DTS 0012	1	7 232	7
DTS 1224	21	1 481	31
DTS 2440	7	1 614	11
DFN 1224	2	1 060	2
PG 0012	6	2 556	15
HOK 1224	0	2 409	1

Note: For 2006 the population of vessels is assumed to be the same as in 2005

Energy efficiency



4.16. UNITED KINGDOM

In 2005 national production amounted to 866.3 mln Euro². Major segments include the Pelagic trawl/seine VL40XX segment, the Demersal trawl/seine VL1224 and VL2440 segments, representing 24%, 19% and 13% of the national value of landings respectively. The most important species for the UK fleet are mackerel, nephrops (Norway lobster) and haddock which account for 18%, 15% and 7% of the total value of UK landings respectively.

In 2005 the UK fleet generated income (gross value added) of 445.9 mln Euro. Net profit / loss³ are estimated at 64.1 mln Euro. The best performance⁴ in terms of profitability has been achieved by the Pots and traps VL1224 segment, while the Beam trawl VL40XX segment shows the highest loss. The average crew share in these segments amounted to 31 600 Euro/crewman and 36 800 Euro/crewman respectively.

In view of trends in landings / TACs / prices and fuel costs, the financial performance of the UK fleet in 2006 is likely to have been marginally better than in 2005. Landings volumes and values both increased in 2006 compared with 2005 and this trend looks set to continue into

² This figure includes income generated from activities other than fishing. Total non-fishing income for the UK fleet in 2005 was estimated to be 24.9 mln Euro.

³ After deduction of interest and depreciation.

⁴ Where costs and profits information was attainable.

2007. Demersal, pelagic and shellfish prices all increased in 2006. However, TACs for certain key stocks reduced in 2006 and again in 2007 while fuel costs peaked in the third quarter of 2006, meaning that achieving profitability was likely to be a major challenge for the majority of the UK fleet. The outlook for 2007 is again marginally better than 2006 primarily due to the stabilisation of fuel costs.

Basic data total national fleet, 2005

Indicator	Value
Income (mln Euro)	866.3
Value added (mln Euro)	445.9
Volume of production (1000 tonnes)	715.1
Number of engaged crew	12 647
Number of vessels	6 767

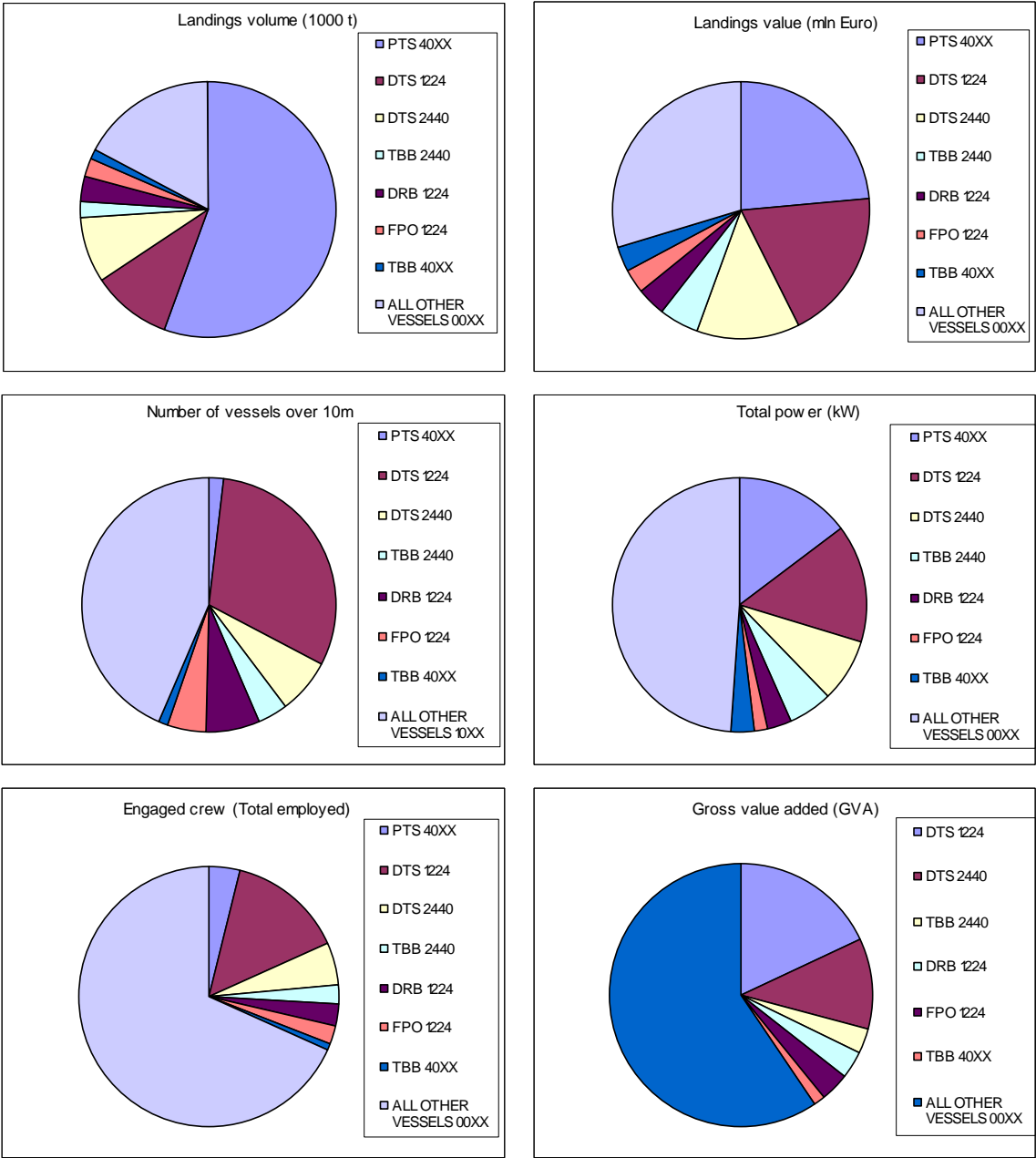
Productivity and TAC dependence in 2005

Segment (gear/size)	Income / vessel (Euro)	Catch / year / vessel (tonnes)	Income /day (Euro)	GVA / day (Euro)	GVA / Total employed (Euro)	Crew share / engaged crewman (Euro)
1. DTS VL1224	325 675	146.3	1 214 928	585 906	44 452	25 591
2. DTS VL2440	987 002	543.6	501 565	258 198	34 814	41 484
3. TBB VL2440	705 593	230.6	276 796	83 716	21 195	35 282
4. DRB VL1224	273 403	219.6	224 280	136 014	41 592	24 182
5. FPO VL1224	329 777	188.9	170 993	103 992	57 507	31 605
6. TBB VL40XX	1 449 950	553.6	142 034	37 212	61 022	45 705

Change 2004-2005

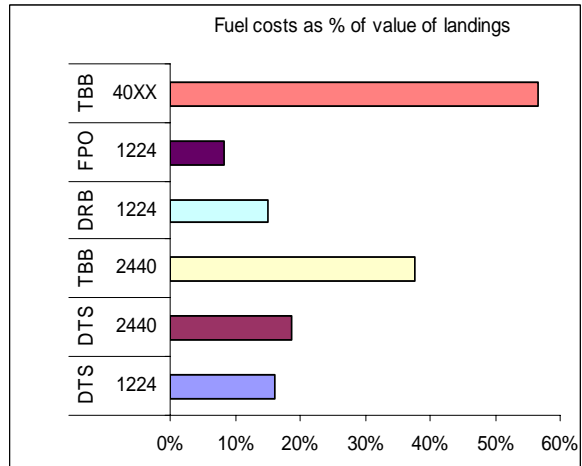
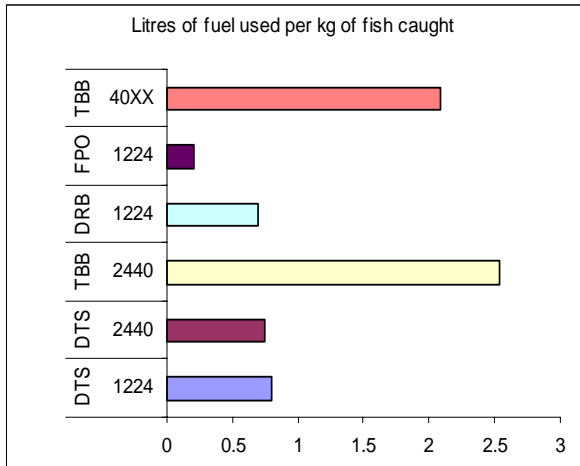
Segment (gear/size)	Income / vessel (%)	Catch / year / vessel (%)	Income /day (%)	GVA / day (%)	GVA / Total employed (%)	Crew share / engaged crewman (%)
1. DTS	111.9%	99.6%	123.2%	121.5%	126.0%	127.6%
2. DTS	105.9%	103.8%	120.2%	118.8%	114.6%	112.2%
3. TBB	101.3%	84.1%	105.3%	86.5%	41.5%	102.4%
4. DRB	92.8%	115.8%	99.2%	108.1%	102.7%	103.4%
5. FPO	101.2%	92.0%	115.9%	105.4%	262.5%	117.4%
6. TBB	103.5%	100.0%	99.2%	79.6%	86.6%	113.2%

Composition of production by segment⁵



⁵ All pie charts relate to the total UK fleet except the number of vessels – UK vessels under 10m in length were not allocated a DCR segment in 2005. This will be resolved for the 2006 report. In 2005 the UK fleet register had details on 6 767 vessels, with 1 594 vessels over 10m in length.

Energy efficiency



5. REGIONAL ANALYSIS

5.1. BALTIC

The Baltic covers ICES areas IIIb, IIIc and III d. The analysis of the performance of the Baltic fleets in 2005 is based on data regarding 37 segments from Denmark, Estonia, Finland, Latvia, Lithuania, Poland and Sweden.

In 2005 the 37 Baltic fleet segments consisted of 3 816 vessels with a total of 428.7 (1000) kW and around 9.5 (1000) crewmen engaged on board. The total value of landings is estimated at 246 mln Euro.

Regional summary by country and gear

Gear	Country	Number of vessels	1000 kW	Income mln Euro	GVA mln Euro	Engaged crew	Volume of landings 1000 tonnes
Demersal gears	Denmark	105	18.0	21.5	12.3	226	39.6
	Latvia						4.6
	Lithuania	30	6.4	4.1	2.0	181	6.5
	Poland	172	36.5	10.3	2.0	777	19.0
	Sweden	224	67	37	13	551	27
Total demersal		531	127.9	72.9	29.3	1 735	96.7
Pelagic gears	Denmark	24	9.1	11.4	5.7	95	25.5
	Estonia	150	27.6	8.0	2.5	466	70.6
	Finland	56	6.4	13.0	6.5	131	79.3
	Latvia	111	25.8	18.1	8.7	559	82.9
	Poland	66	28.7	13.5	2.4	494	88.0
	Sweden	61	66	43	16	362	212
Total pelagic		468	163.6	107	41.8	2 107	558.3
Polyvalent gears	Denmark	45	6.1	7.3	3.9	67	6.7
Total polyvalent		45	6.1	7.3	3.9	67	6.7
Passive gears	Denmark	110	9.6	13.3	8.2	158	5.3
	Estonia	881	15	2.4	1.2	2 003	7.8
	Finland	186	1.1	7.6	4.0	276	5.4
	Latvia	82	14.6	5.1	0.8	1 701	5.1
	Lithuania	229	6.7	1.1	0.7	289	0.9
	Poland	817	45.1	15.1	9.0	2 031	17.4
	Sweden	467	39	14	7	1 165	7
Total passive		2 772	131.1	58.6	30.9	5 592	48.9
Regional total		3 816	428.7	245.8	105.9	9 501	710.6

Regional summary by country and size

Gear	Country	Number of vessels	1000 kW	Income mln Euro	GVA mln Euro	Engaged crew	Volume of landings 1000 tonnes
0-12 m	Denmark	116	8.5	9.5	5.6	111	10.3
	Finland	169	0.7	6.4	3.5	239	5.1
	Poland	685	27.7	9.4	6.5	1 507	12.5
	Sweden	475	40	15	7	1 141	7
	Lithuania	221	5.5	0.5	0.3	222	0.4
	Latvia	41	8.0	0.9	-0.7	1 486	2.5
	Estonia	881	15	2.4	1.2	2 003	7.8
	Total 0-12		2 588	105.4	44.1	23.4	5 202
12-24m	Denmark	163	31.6	40.5	23.0	410	54.5
	Finland	55	2.2	4.1	2.0	105	28.2
	Poland	256	39.6	11.9	4.4	1 002	13.9
	Sweden	196	52	27	11	984	24
	Estonia	61	4.8	0.5	0.3	88	65.7
	Lithuania	8	1.2	0.6	0.4	67	0.5
	Latvia	36	5.8	2.3	0.8	108	12.6
	Total 12-24m		775	137.2	86.9	41.9	1762
24-40 m	Denmark	5	2.7	3.4	1.5	26	12.2
	Finland	18	4.6	10.2	5.0	64	51.5
	Poland	114	42.9	17.6	2.6	793	97.9
	Sweden	67	54	34	13	323	131
	Estonia	89	22.7	7.5	2.2	378	5.1
	Lithuania	30	6.4	4.1	2.0	181	6.5
	Latvia	116	26.6	20.1	9.5	666	77.4
	Total 24-40m		439	159.9	96.9	35.8	2 431
40- m	Sweden	14	26	18	6	122	85
Total 40- m		14	26	18	6	122	85
Regional total		3 816	428.5	245.9	107.1	9 517	711.6

Demersal trawl and seine

Size	Country	Income / vessel	GVA / vessel	Crew costs / engaged crew
0-12	Denmark	91 143	52 683	57 511
	Sweden	63 094	18 011	1 625
12-24	Denmark	214 619	120 118	46 965
	Poland	49 833	14 658	2 598
24-40	Sweden	157 358	47 822	9 124
	Lithuania	136 730	68 249	6 162
	Poland	85 669	4 267	2 390
	Sweden	358 251	86 433	15 716

Pelagic trawl and seine

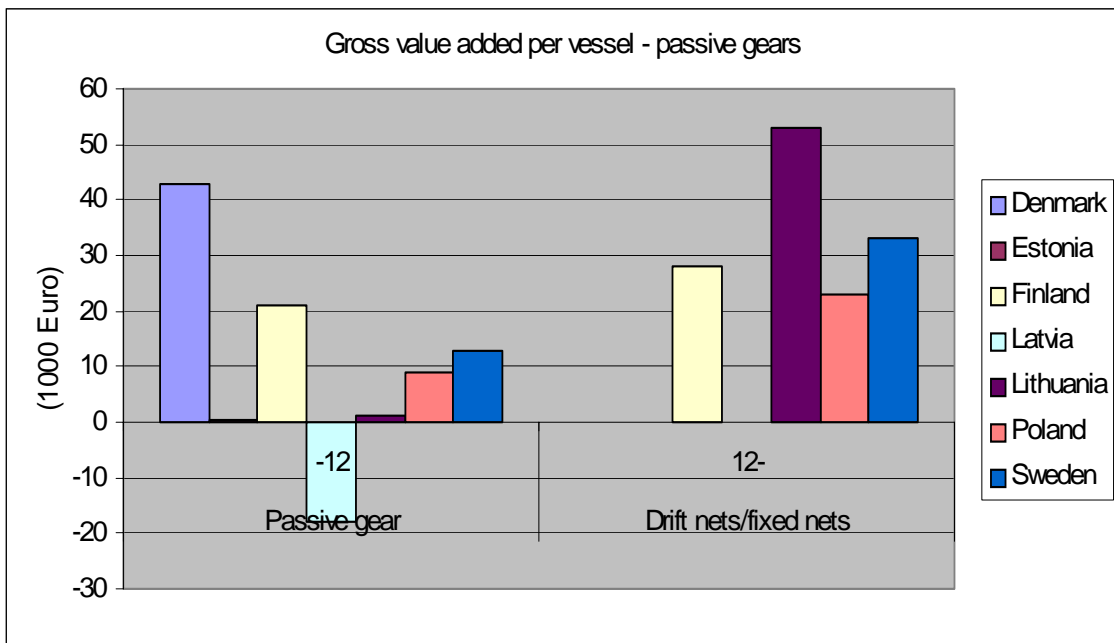
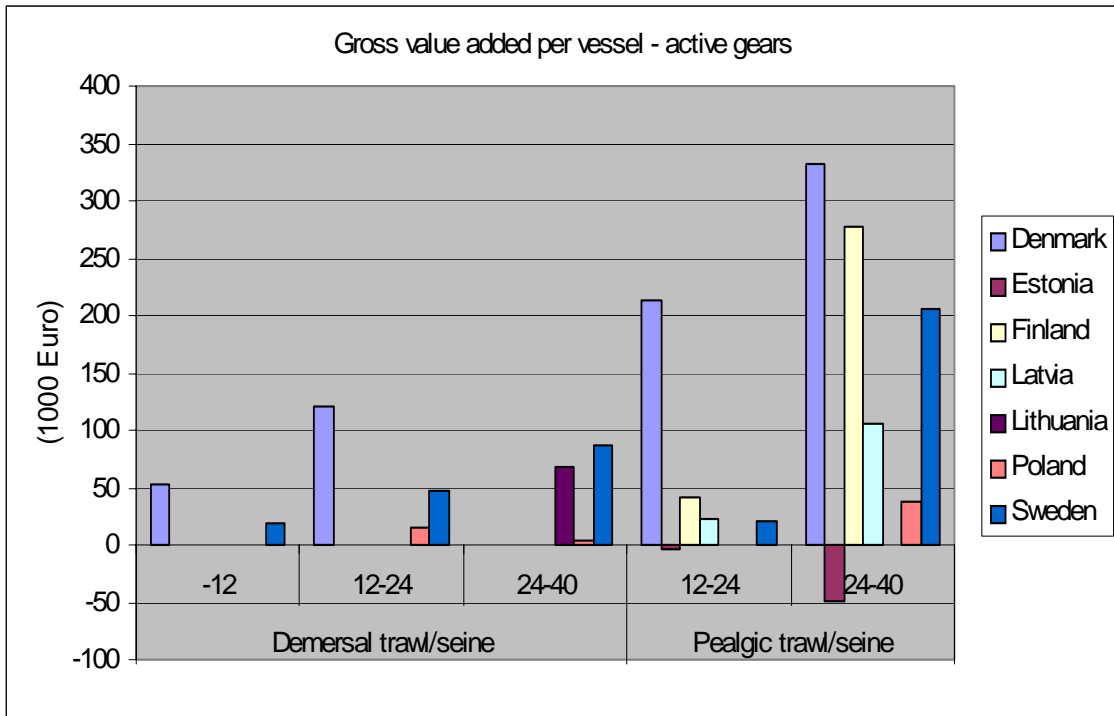
Country	Income / vessel	GVA / vessel	Crew costs / engaged crew
Denmark	409 851	213 173	48 516
Estonia	8 695	4 900	3 074
Finland	74 759	40 963	13 643
Latvia	62 611	21 722	
Sweden	150 666	21 150	3 672
Denmark	741 636	332 034	46 631
Estonia	84 060	25 164	6 234
Finland	565 698	276 519	47 888
Latvia	211 453	105 893	
Poland	204 177	36 575	6 786
Sweden	621 008	206 071	19 048

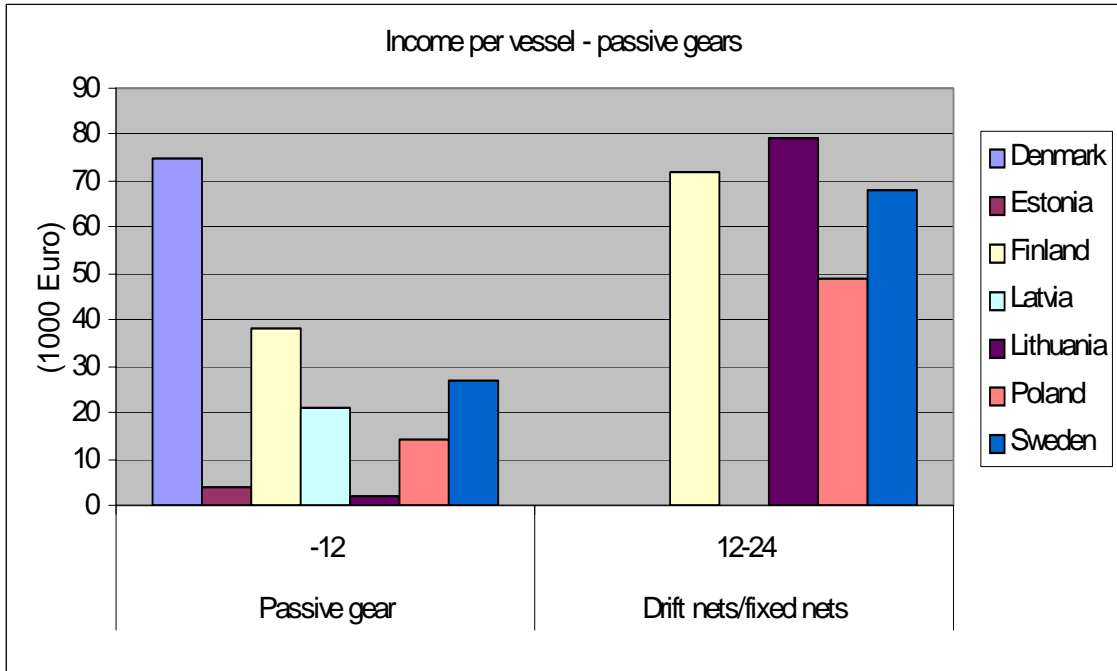
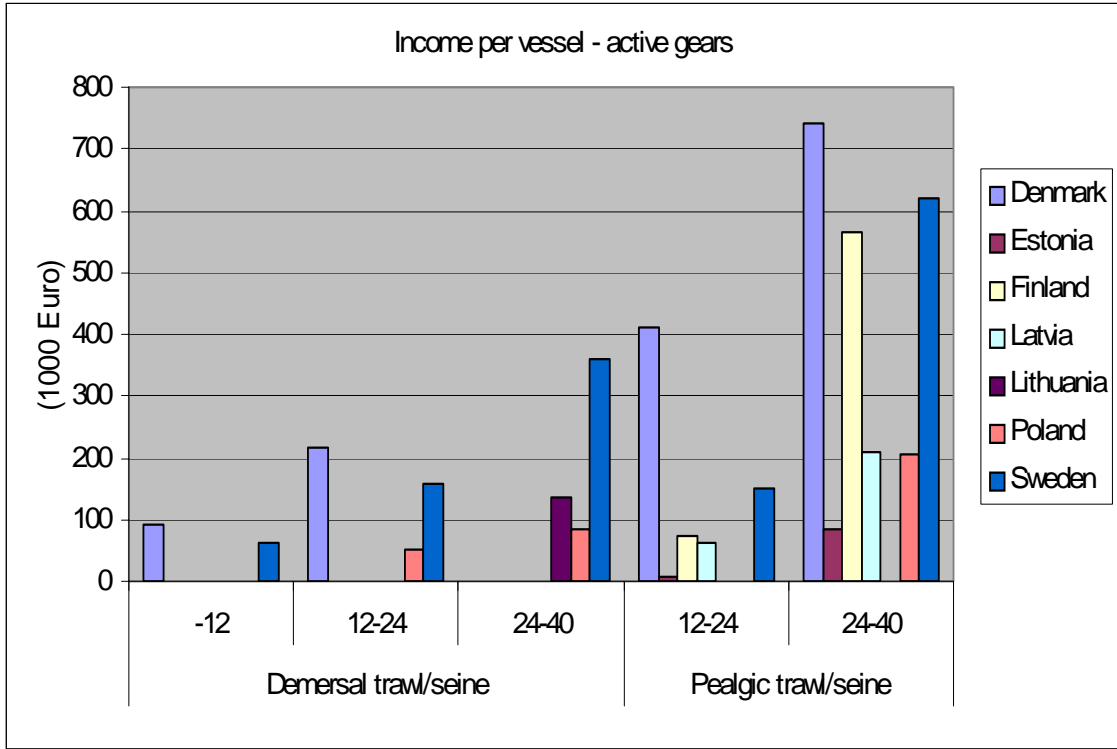
Passive gears

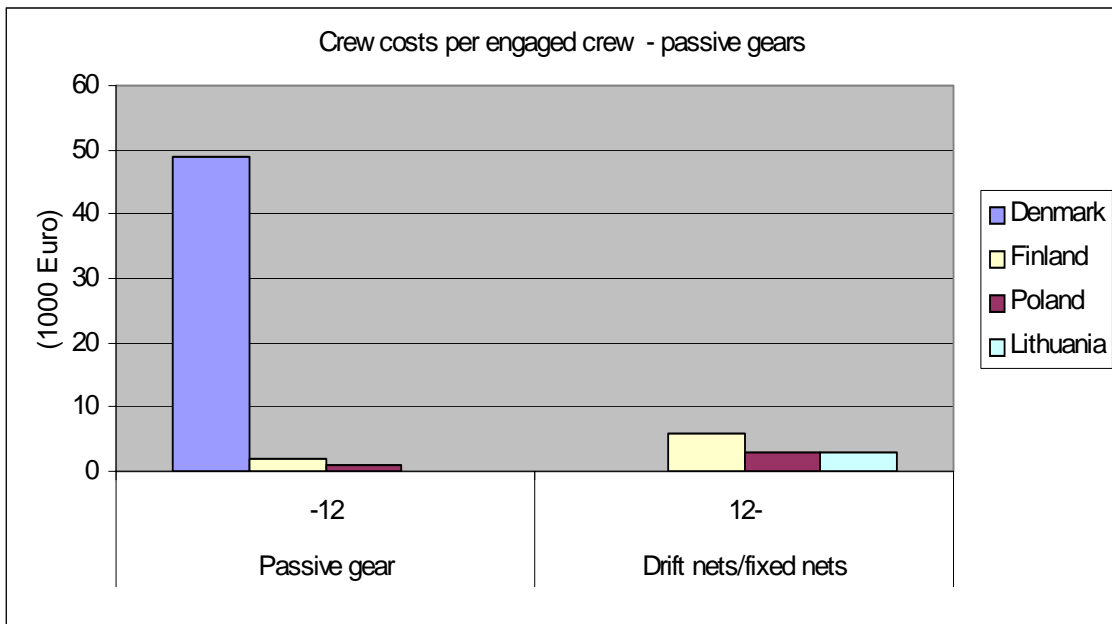
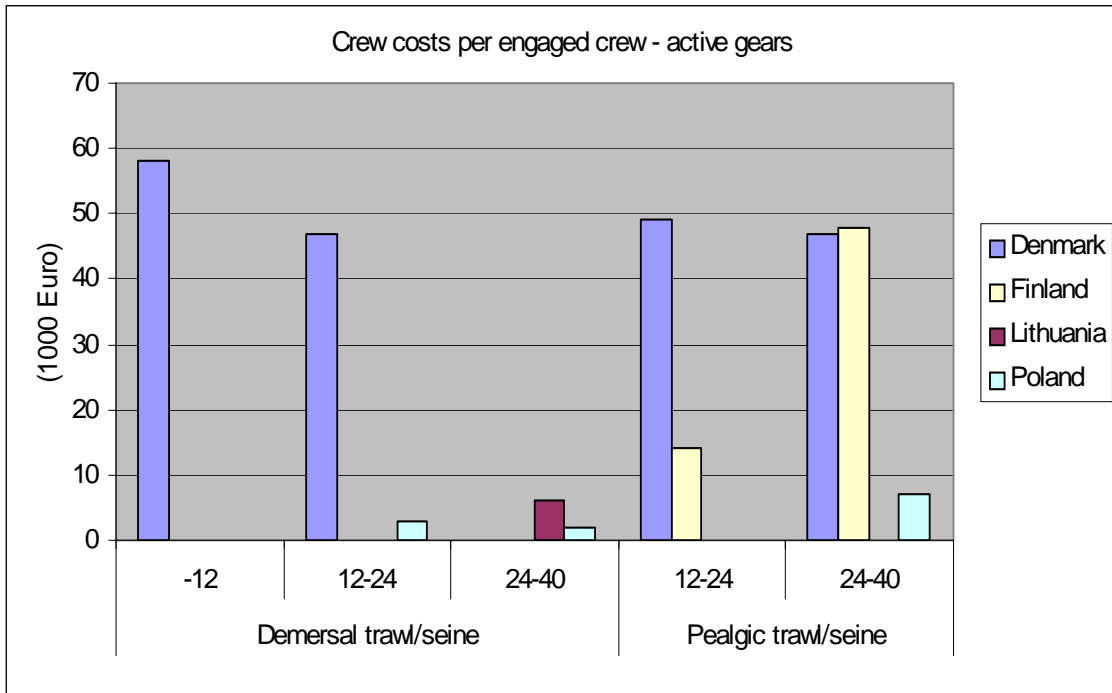
Country	Income / vessel	GVA / vessel	Crew costs / engaged crew
Denmark	74 700	43 104	49 376
Estonia	4 088	1 309	3 844
Finland	37 805	20 784	1 909
Latvia	20 878	-18 146	
Lithuania	2 174	1 408	1 126
Poland	13 713	9 434	1 299
Sweden	27 454	12 539	-

Drift and fixed nets

Country	Income / vessel	GVA / vessel	Crew costs / engaged crew
Finland	72 167	28 419	5 890
Lithuania	79 302	52 890	3 058
Poland	49 125	22 925	3 421
Sweden	67 792	33 066	1 432







5.2. ATLANTIC

Spain Atlantic	France Atlantic	Portugal (Mainland) Atlantic
Features Value of landings: 784 090 766€ Number of vessels: 10 177 FTE: 38 540 KW: 803 833	Features: Value of landings: 934 283 912€ Number of vessels: 3 543 FTE: 10 532 KW: 613 377	Features: Value of landings: 205 500 641€ (only fresh and refrigerated fish) Number of vessels: 4 360 Engaged crew: 14 750 (missing one segment) KW: 252 085

The Atlantic covers ICES area 27. The analysis of the performance of the Atlantic fleets in 2005 is based on data regarding 20 segments from France, Portugal (excluding Azores and Madeira) and Spain.

In 2005 the 20 Atlantic fleet segments consisted of 18 080 vessels with a total of 1 669 295 kW. The total value of landings is estimated at 1 950.8 mln Euro.

Regional summary by country and gear

Gear	Country	Number of vessels	1000 kW	Income mln Euro	GVA mln Euro	FTE (1)	Volume of landings 1000 tonnes
Demersal gears	France	853	264	419.7	196.7	3 714	n.a.
	Portugal (2)	120	53.7	73.1	35.0	1 762	n.a.
	Spain	785	303	415.9	n.a.	n.a.	171.0
Total demersal		1 758	6 20.7	908.7	n.a.	n.a.	n.a.
Pelagic gears	France	123	34	60.8	35.1	709	n.a.
	Portugal (2)	83	23.7	(3) 40.1	(3) 23.9	(3) 1 782	n.a.
	Spain	2 165	384	336.2	n.a.	n.a.	162.2
Total pelagic		2 371	441.7	437.1	n.a.	n.a.	n.a.
Dredges	France	285	50	72.3	44.4	957	n.a.
Total Dredges		285	50	72.3	44.4	957	n.a.
Polyvalent mobile gears	France	144	22	32.5	20.9	387	n.a.
	Portugal (2)	14	28.5	n.a.	n.a.	n.a.	n.a.
Total MGP		158	50.5	n.a.	n.a.	n.a.	n.a.
Other mobile gears	France	282	19	21.3	14.7	326	n.a.
Total Other Mobile		282	19	21.3	14.7	326	n.a.
Gears using hooks	France	377	39	44.9	29.9	594	n.a.
	Portugal (2)	73	9.9	15.8	8.4	659	n.a.
Total HOK		450	48.9	60.7	38.3	1253	n.a.
Drift and fixed nets	France	715	108	180.2	116.9	2 290	n.a.
		715	108	180.2	116.9	2 290	n.a.
Pots and traps	France	374	41	59.3	38.5	855	n.a.
Total Pots		374	41	59.3	38.5	855	n.a.

Polyvalent passive gears	France	112	10	11.7	7.6	183	n.a.
	Portugal (2)	4 011	127.7	(3) 95.9	(3) 56.1	(3) 9 956	n.a.
	Spain	7 227	147	32.0	n.a.	n.a.	16.4
Total PGP		1 1350	284.7	139.6	n.a.	n.a.	n.a.
Other Passive Gear	France	87	5	4.5	3.6	118	n.a.
Total other passive		87	5	4.5	3.6	118	n.a.
Combining mobile & passive gears	France	191	21	27.2	18.7	398	n.a.
	Portugal (2)	59	8.7	7.4	4.0	591	n.a.
Total Combining mobile & passive gears		250	29.7	34.6	22.7	989	n.a.
Regional total		18 080	1 699.2	1 950.8			

(1) Engaged crew for Portugal (Mainland).

(2) Provisional data for Portugal (Mainland) for all parameters except for capacity (number and kW).

(3) Incomplete data, missing data for VL2440.

Regional summary by country and size

Size	Country	Number of vessels	1000 kW	Income mln Euro	GVA mln Euro	FTE (1)	Volume of landings 1000 tonnes
0-12 m	France	2 487	254	324,3	213,1	4 771	n.a.
	Portugal (2)	3 766	113.7	62.3	42.1	8 138	n.a.
	Spain	8 202	n.a.	8.5	n.a.	n.a.	4.0
Total 0-12		14 455	n.a.	395.1	n.a.	n.a.	n.a.
12-24m	France	930	274	457.8	243.6	4 552	n.a.
	Portugal (2)	449	94.4	85.5	42.3	4 743	n.a.
	Spain	1 060	n.a.	120.4	n.a.	n.a.	79.2
Total 12-24m		2 439	n.a.	663.7	n.a.	n.a.	n.a.
24-40 m	France	108	55	103.5	50.2	878	n.a.
	Portugal (2)	131	58.1	(3) 84.4	(3) 43.0	(3) 1 869	n.a.
	Spain	769	n.a.	513.6	n.a.	n.a.	213.5
Total 24-40m		1 008	n.a.	701.5	n.a.	n.a.	n.a.
40- m	France	18	30	48.7	20.0	331	n.a.
	Portugal (2)	14	33.6	n.a.	n.a.	n.a.	n.a.
	Spain	146	n.a.	141.7	n.a.	n.a.	52.8
Total 40- m		178	n.a.	n.a.	n.a.	n.a.	n.a.
Regional total		18 080					

(1) Engaged crew, for Portugal (Mainland).

(2) Provisional data for Portugal (Mainland) for all parameters except for capacity (number and kW).

(3) Incomplete data, missing data for segments HOK and PGP.

Demersal trawl and seiner

Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
0-12	France	150	91	32
	Portugal			
	Spain	19		
12-24	France	540	253	40
	Portugal	189	95	13
	Spain	21		
24-40	France	921	394	42
	Portugal	880	419	16
	Spain	727		
40 +	France	2 706	1 110	54
	Portugal			
	Spain	1350		

Pelagic trawl and seine

Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
0-12	France	227	158	31
	Portugal			
	Spain	10		
12-24	France	523	299	37
	Portugal	310	178	8
	Spain	109		
24-40	France			
	Portugal	1 063	658	27
	Spain	624		
40 +	France			
	Portugal			
	Spain	701		

Dredge

Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
0-12	France	151	94	27
	Portugal			
	Spain			
12-24	France	388	237	33
	Portugal			
	Spain			

Polyvalent mobile gears

Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
0-12	France	158	109	31
	Portugal			
	Spain			
12-24	France	350	211	38
	Portugal			
	Spain			

Other mobile gears

Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
0-12	France	75	52	30
	Portugal			
	Spain			

Drift and fixed nets

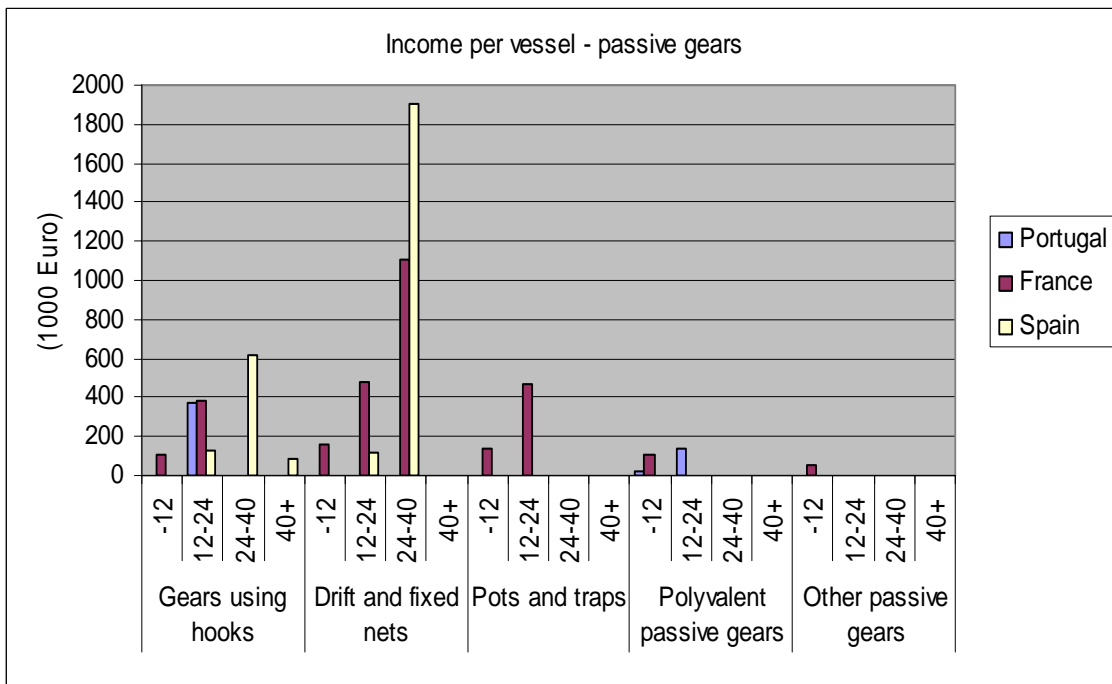
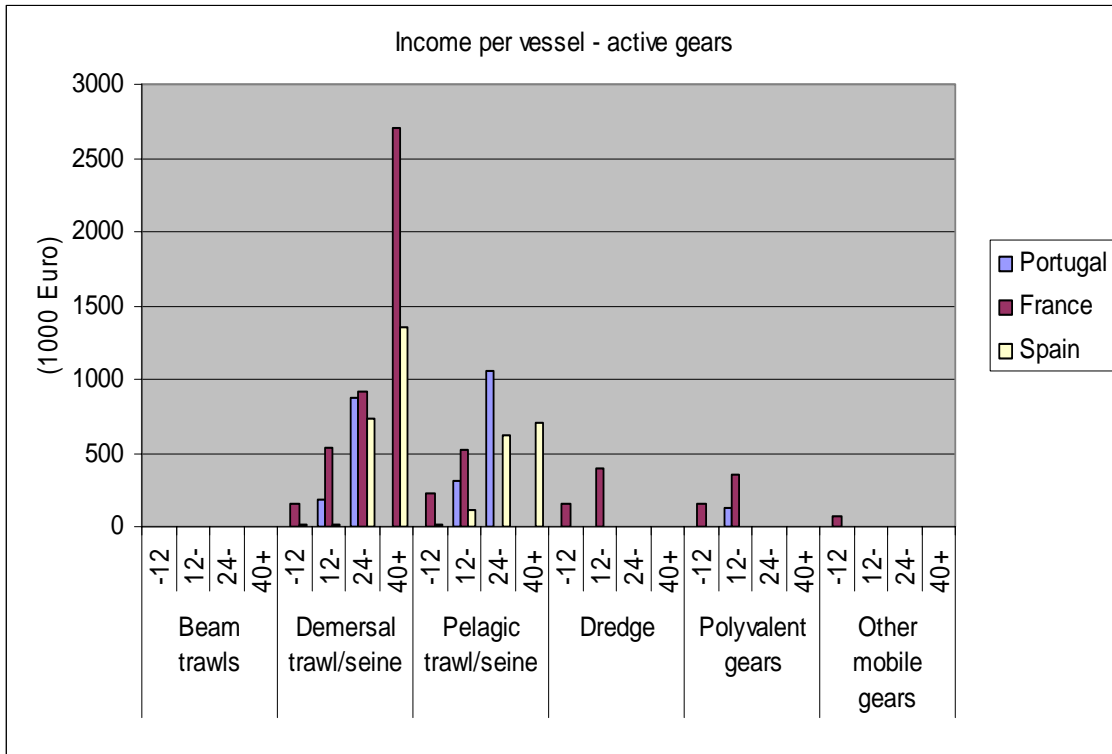
Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
0-12	France	159	105	30
	Portugal			
	Spain	1		
12-24	France	482	303	43
	Portugal			
	Spain	115		
24-40	France	1 106	743	34
	Portugal			
	Spain	1 903		

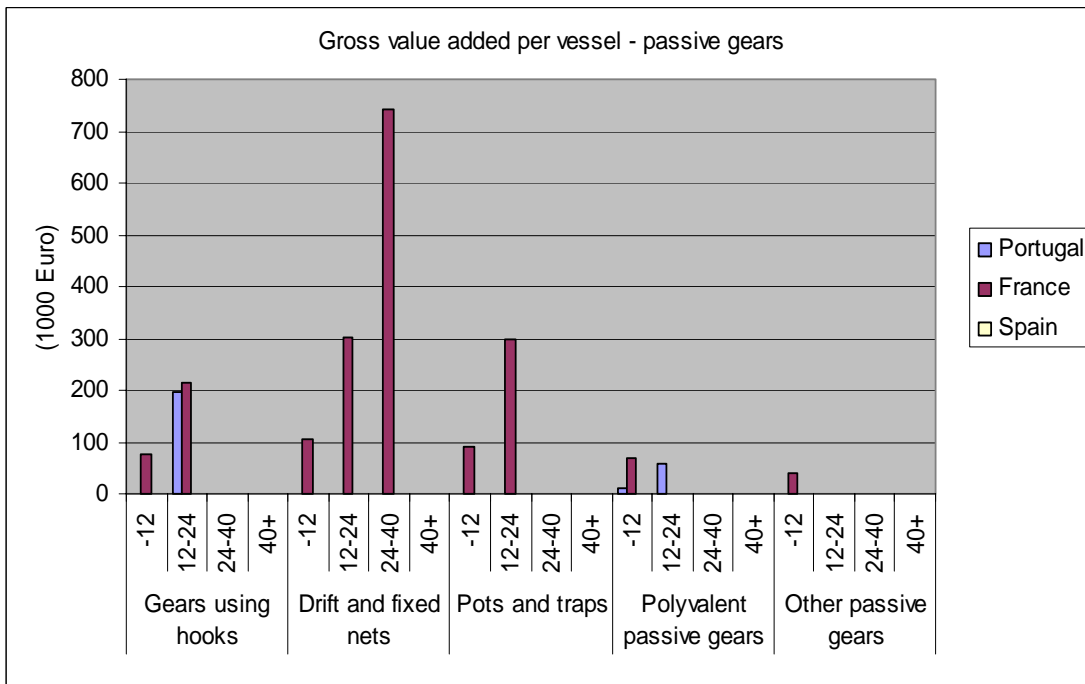
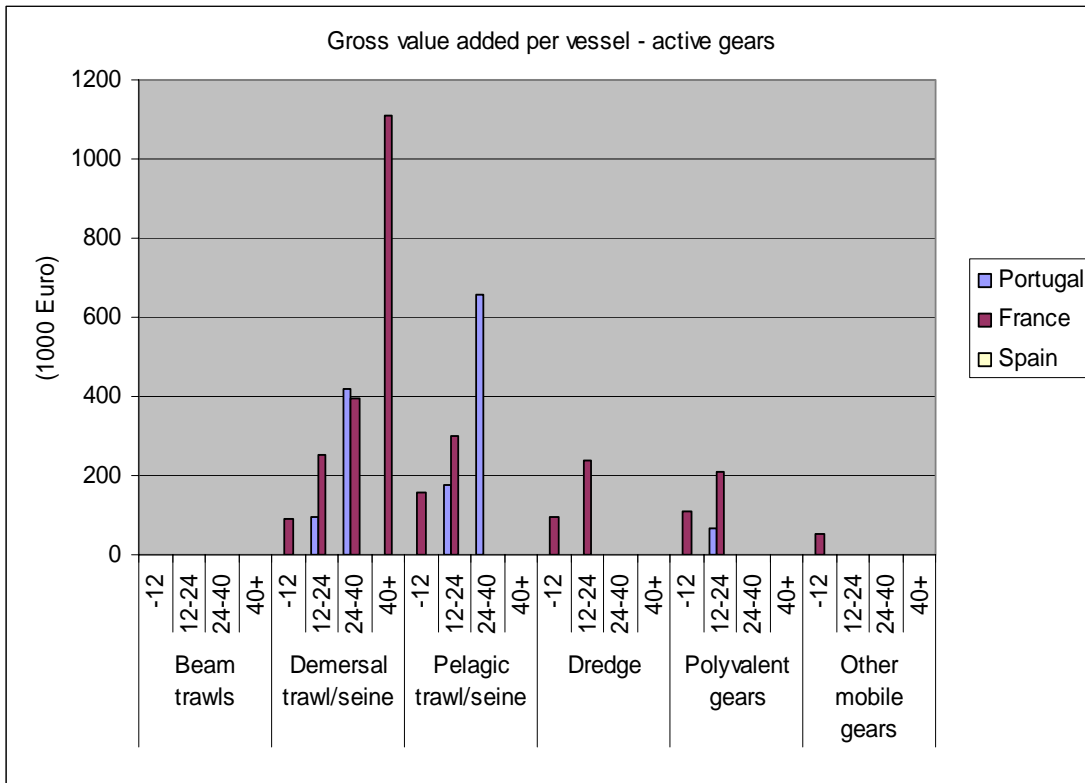
Gears with hooks

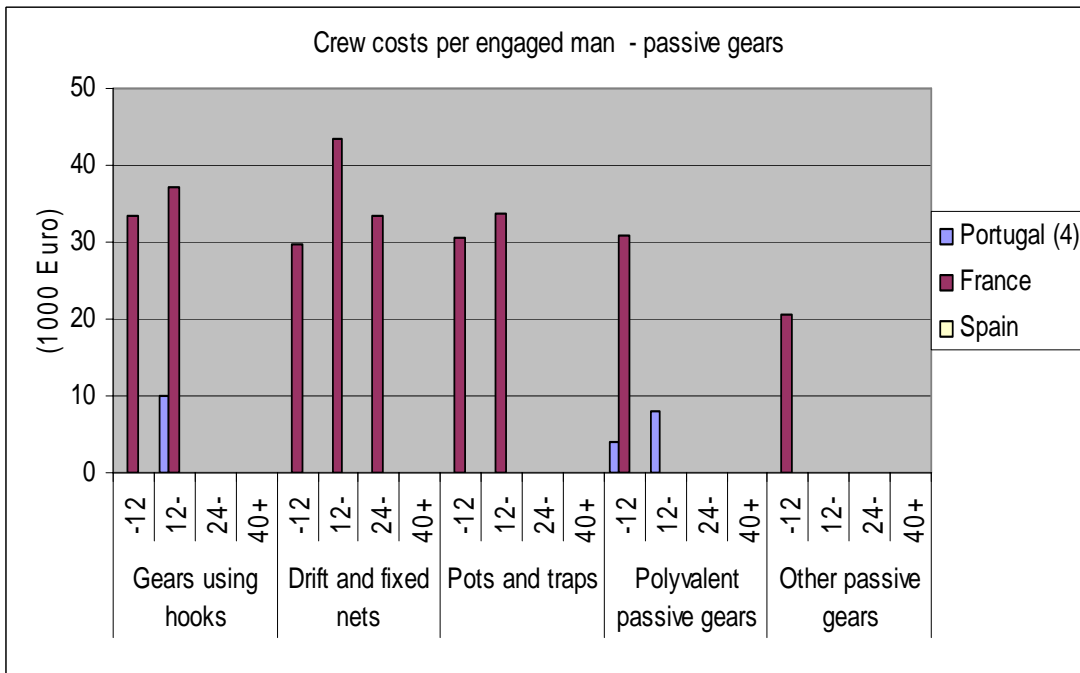
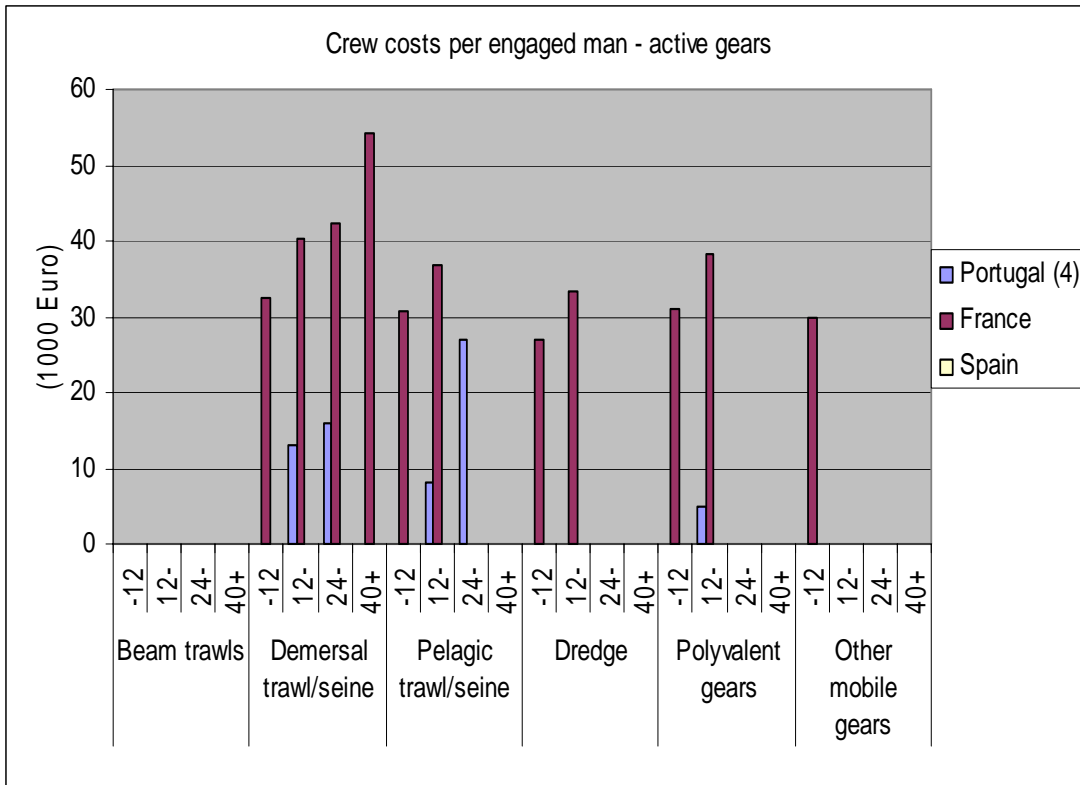
Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
0-12	France	111	75	34
	Portugal			
	Spain	1		
12-24	France	380	215	37
	Portugal	368		10
	Spain	126		
24-40	France			
	Portugal			
	Spain	619		
40 +	France			
	Portugal			
	Spain	90		

Pots and traps

Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
0-12	France	141	92	31
	Portugal			
	Spain			
12-24	France	472	299	34
	Portugal			
	Spain			







5.3. NORTH SEA

The North Sea region covers ICES areas IV and IIIa. The analysis of the performance of the North Sea region fleets in 2005 is based on data regarding 11 segments from Belgium, Denmark, Netherlands and the United Kingdom. The Danish and Dutch fleet segments include only vessels with a level of economic activity above the national threshold.

In 2005 the 11 North Sea fleet segments consisted of 1 723 vessels with a total of 807 000 kW and a total of 6 932 FTE. The total value of landings is estimated at 970 mln Euro.

Regional summary by country and gear

Gear	Country	Number of vessels	1000 kW	Income mln Euro	GVA mln Euro	FTE	Volume of landings 1000 tonnes
Demersal gears	Belgium	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	Denmark	190	33.5	39.3	22	428	57
	Netherlands	26	9.8	17.3	7.6	104	7
	UK	600	203	268.9	130.4	2 483	131.9
	Total demersal	816	246.3	325.5	160	3 015	195.9
Pelagic gears	Belgium	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	Denmark	205	130.8	205.4	114.6	1 078	659
	Netherlands	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	UK	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	Total pelagic	205	130.8	205.4	114.6	1 078	659
Beam trawl	Belgium	112	62.5	82.7	25.1	531	20.8
	Denmark	32	10.9	19.2	10.4	119	8
	Netherlands	322	249.2	230.2	78.3	1 360	67
	UK	78	74.6	67.7	19.1	388	23
	Total Beam trawl	544	397.2	399.8	132.9	2 398	118.8
Dredges	Belgium	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	Denmark	50	6.4	10.2	7.3	68	59
	Netherlands	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	UK	108	25.9	29.5	15.5	373	23.7
	Total Dredges	158	32.3	39.7	22.8	441	82.7
Total regional		1 723	806.6	970.4	430.3	6 932	1 056.4

Regional summary by country and size

Gear	Country	Number of vessels	1000 kW	Income mln Euro	GVA mln Euro	FTE	Volume of landings 1000 tonnes
0-12 m	Belgium	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	Denmark	43	4.9	6.9	5.1	57	29
	Netherlands	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	UK	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	Total 0-12	43	4.9	6.9	5.1	57	29
12-24m	Belgium	52	11.1	16.0	4.8	179	4.1
	Denmark	301	65.4	85.3	48.4	793	143
	Netherlands	183	37.1	54.1	29.5	538	20
	UK	597	157.4	188.8	96.3	2 190	95.3
	Total 12-24m	1 133	271	344.2	179	3 700	262.4

24-40 m	Belgium	60	51.4	66.7	20.3	352	17
	Denmark	94	57.5	73.9	32.1	531	236
	Netherlands	65	54.2	50.4	20.8	314	15
	UK	172	118.9	152.6	62.7	956.4	74.4
Total 24-40m		391	282	343.6	135.9	2 153.4	342.4
40XX	Belgium	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	Denmark	39	53.8	108.1	68.7	313	374
	Netherlands	100	167.7	143	35.5	612	38
	UK	17	27.3	24.6	6.0	98	9.4
Total 40XX		156	248.8	275.7	110.2	1 023	421.4
Regional total		1 723.0	806.7	970.4	430.2	6 933.4	1 055.2

Beam trawl

Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
12-24	Belgium	308 266	92 308	36 789
	Denmark	419 929	296 551	65 960
	Netherlands	346 490	159 144	40 969
	UK	n.a.	n.a.	n.a.
24-40	Belgium	1 111 693	338 333	63 445
	Denmark	1 387 859	454 730	55 417
	Netherlands	922 593	304 039	43 954
	UK	705 593	215 500	55 301
40XX	Belgium	n.a.	n.a.	n.a.
	Denmark	n.a.	n.a.	n.a.
	Netherlands	1 267 233	355 324	42 909
	UK	1 449 950	351 772	45 705

Demersal trawl and seine

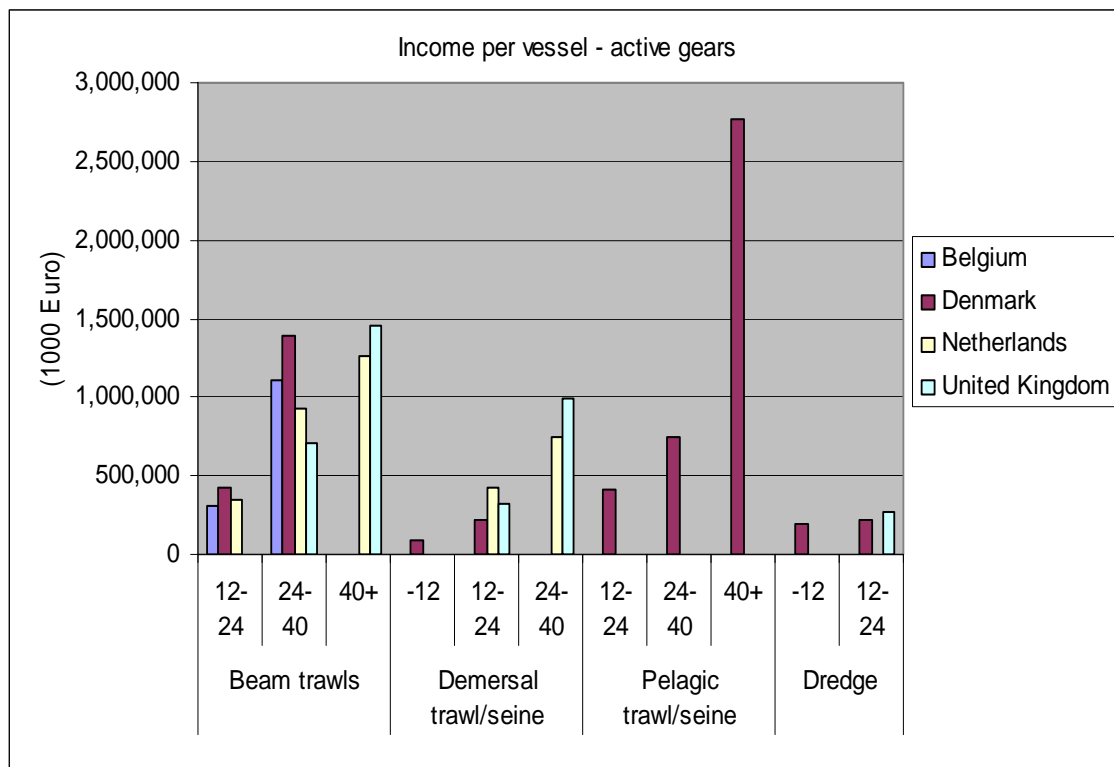
Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
00-12	Belgium	n.a.	n.a.	n.a.
	Denmark	91 143	52 683	57 401
	Netherlands	n.a.	n.a.	n.a.
	UK	n.a.	n.a.	n.a.
12-24	Belgium	n.a.	n.a.	n.a.
	Denmark	214 619	120 118	46 953
	Netherlands	419 950	191 044	43 959
	UK	325 675	165 190	54 302
24-40	Belgium	n.a.	n.a.	n.a.
	Denmark	n.a.	n.a.	n.a.
	Netherlands	748 392	376 122	51 241
	UK	987 002	446 739	41 484

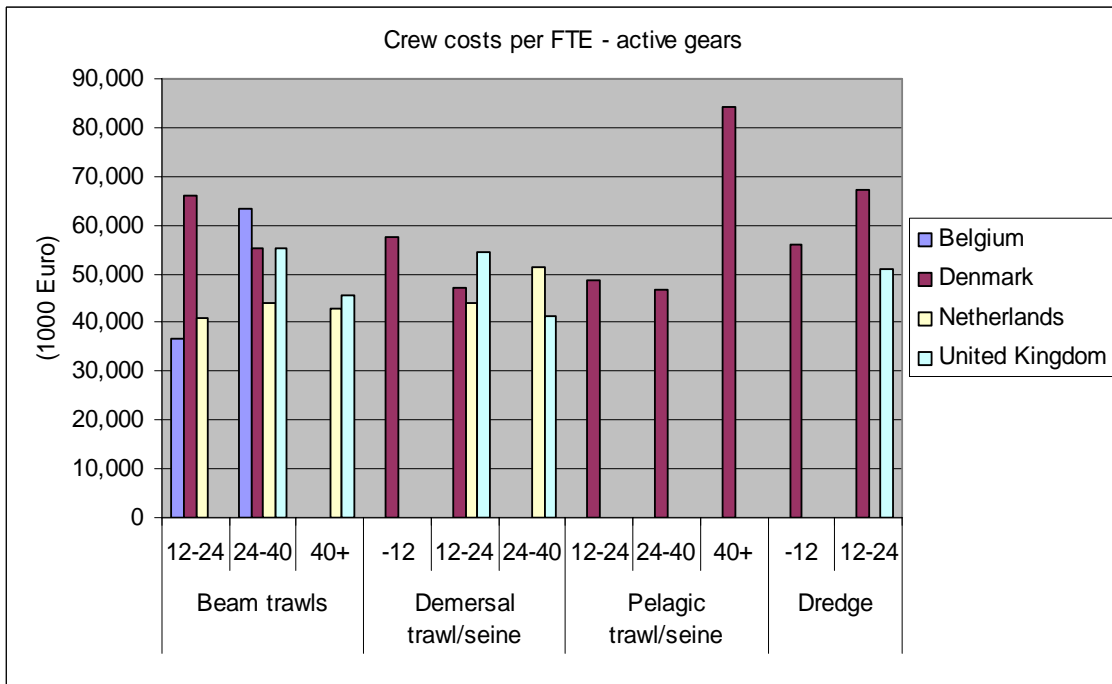
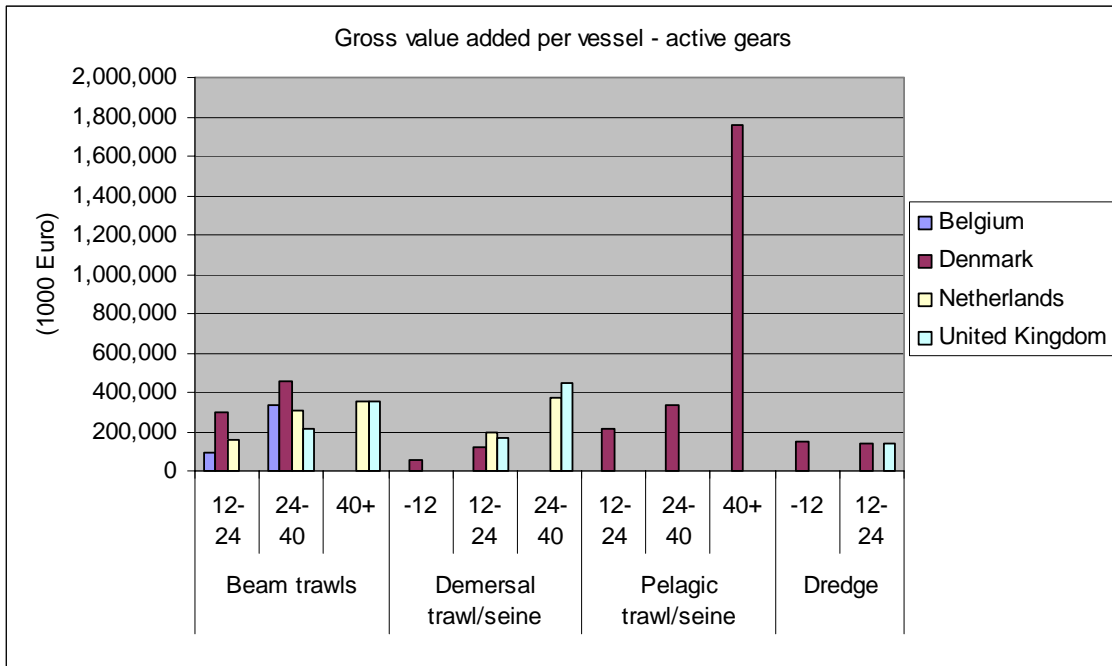
Dredges

Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
00-12	Belgium	n.a.	n.a.	n.a.
	Denmark	191 006	147 902	56 177
	Netherlands	n.a.	n.a.	n.a.
	UK	n.a.	n.a.	n.a.
12-24	Belgium	n.a.	n.a.	n.a.
	Denmark	220 655	141 886	67 072
	Netherlands	n.a.	n.a.	n.a.
	UK	273 403	143 646	50 864

Pelagic trawl and seine

Size	Country	Income / vessel	GVA / vessel	Crew costs / FTE
12-24	Belgium	n.a.	n.a.	n.a.
	Denmark	409 851	213 173	48 482
	Netherlands	n.a.	n.a.	n.a.
	UK	n.a.	n.a.	n.a.
24-40	Belgium	n.a.	n.a.	n.a.
	Denmark	741 636	332 034	46 549
	Netherlands	n.a.	n.a.	n.a.
	UK	n.a.	n.a.	n.a.
40XX	Belgium	n.a.	n.a.	n.a.
	Denmark	2 771 626	1 761 262	84 343
	Netherlands	n.a.	n.a.	n.a.
	UK	n.a.	n.a.	n.a.





5.4. MEDITERRANEAN

The Mediterranean area covers FAO area 37.2. The analysis of the performance of the fleets in 2005 is based on data regarding segments from Cyprus, France, Greece, Italy and Spain.

In 2005 the 48 Mediterranean fleet segments consisted of 37 276 vessels with a total of 2 093 thousands kW. The total value of landings is estimated at 2 534 mln Euro

Regional summary by country and gear

Gear	Country	Number of vessels	1000 kW	Income mln Euro	GVA mln Euro	Engaged crew	Volume of landings 1000 tonnes
Demersal gears	Italy	3 096	615.0	682.2	369.5	10 295	99.7
	France	94	29.0	33.9	13.6	414	n.a.
	Greece	241	69.5	121.6	109.3	1 651	28.9
	Cyprus	16	5.6	1.2	-0.1	112	17.0
	Spain	859	164.0	49.8			
Total demersal		4 306	883.2	888.7	492.3	12 472	145.6
Pelagic gears	Italy	453	125.4	133.9	83.4	2 888	83.0
	France	44	15.0	29.7	16.9	285	n.a.
	Greece	231	40.2	76.7	75.5	2 078	52.0
	Cyprus						
	Spain	401	54.0	42.0			33.2
Total pelagic		1 129	234.6	282.4	175.9	5 251	168.3
Other mobile gears	Italy	715	76.9	62.4	46.3	1 439	17.8
	France	16	1.0	1.1		32	n.a.
	Greece						
	Cyprus						
	Spain						
Total other mobile gears		731	77.9	63.6	46.3	1 471.1	17.8
Passive gears	Italy	10 187	365.9	461.0	318.1	15 859	58.9
	France	965	62.0	29.7	20.7	1 277	n.a.
	Greece	16 510	334.8	732.0	595.7	28 864	101.2
	Cyprus	533	25.9	5.9	-0.4	1 020	1.1
	Spain	2 007	54.0	3.5			0.8
Total passive gears		30 202	842.7	1232.1	934.1	47 019	162.0
Polyvalent gears	Italy	635	38.4	48.9	31.6	1 693	8.9
	France						
	Greece	274	16.6	18.4	13.9	775	5.3
	Cyprus						
	Spain						
Total polyvalent gears		909	54.9	67.4	45.5	2 468	14.3
Regional total		37 276	2 093	2 534	1 694	68 682	508

* France data refer to FTE and not to engaged crew

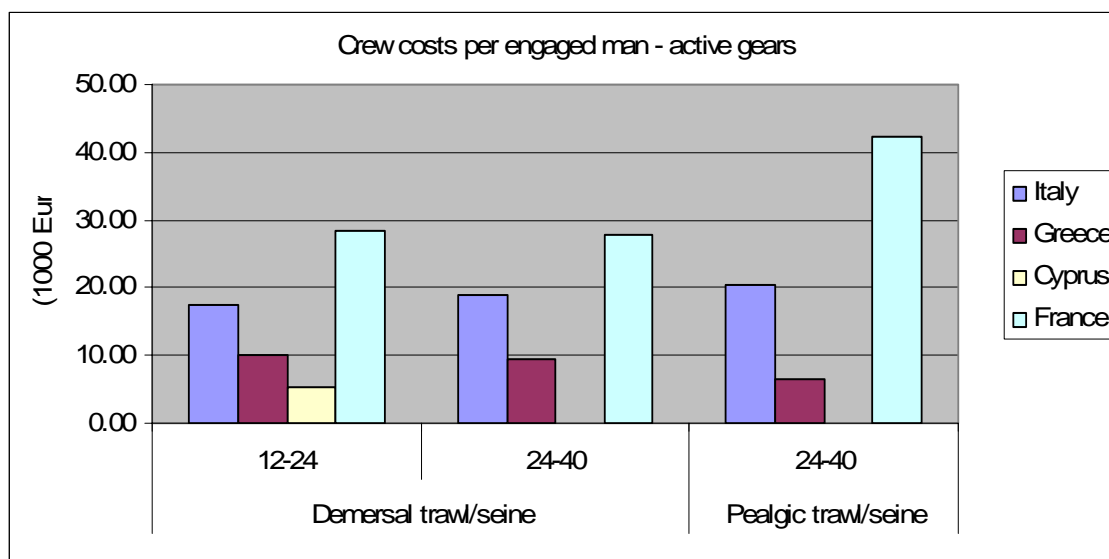
Regional summary by country and size

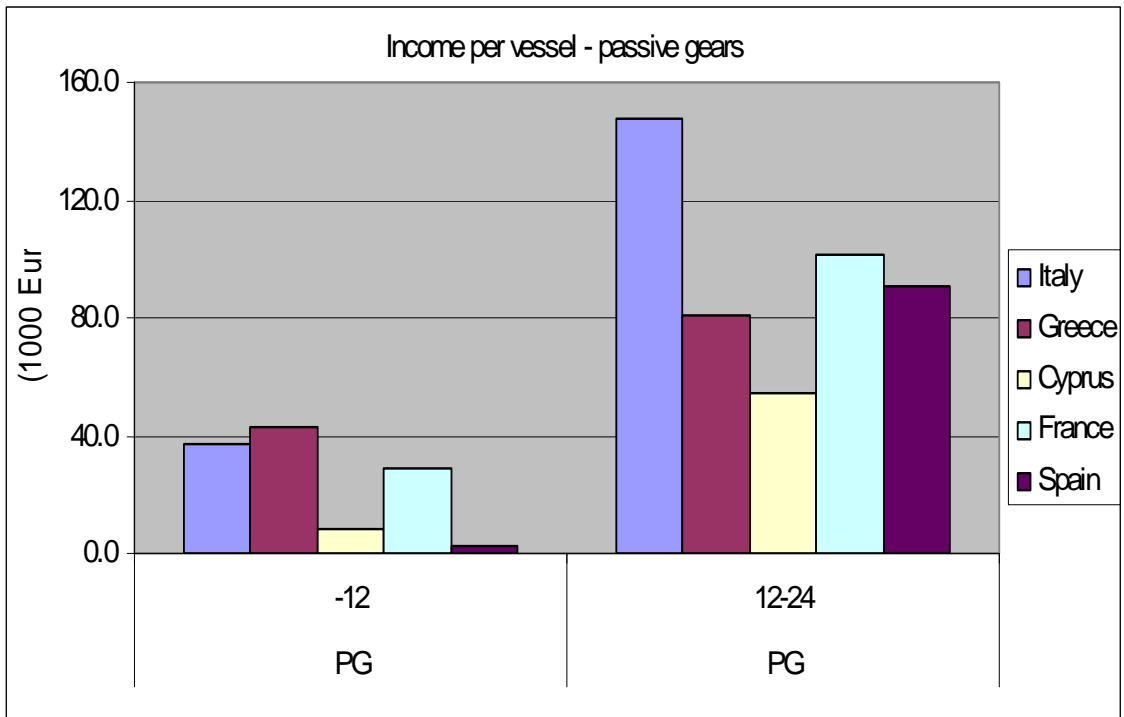
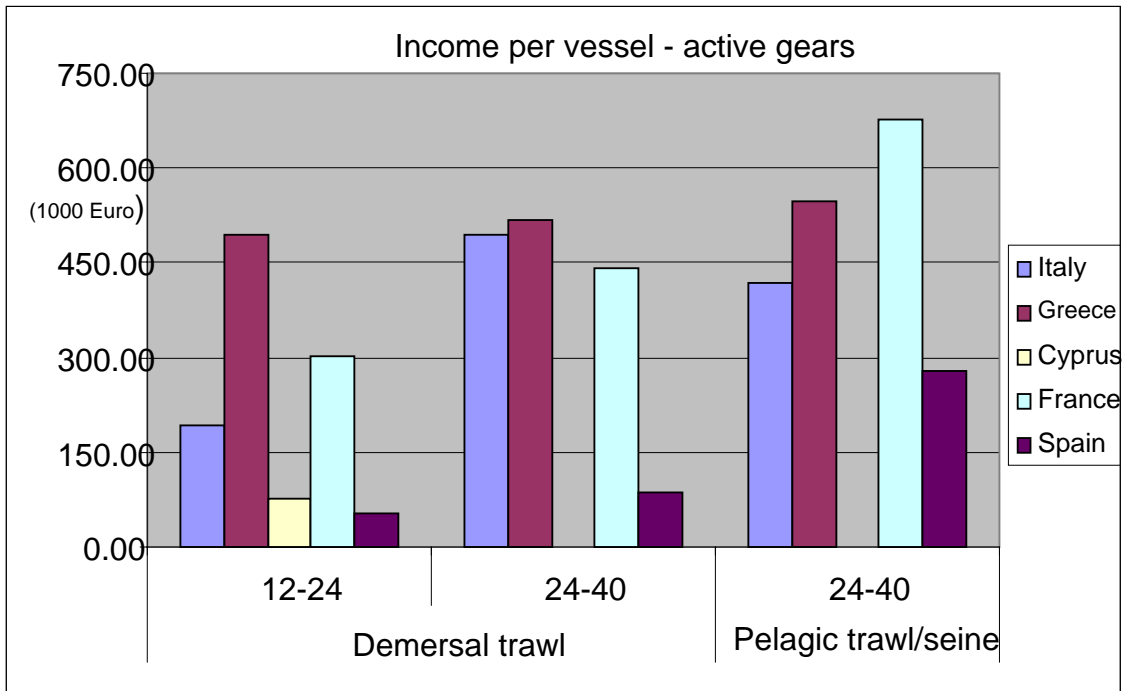
Gear	Country	Number of vessels	1000 kW	Income mln Euro	GVA mln Euro	Engaged crew*	Volume of landings 1000 tonnes
0-12 m	Italy	10 120	283.5	399.8	276.7	15 296.8	55.1
	France	959	60.0	28.6	n.a.	12 54.0	n.a.
	Greece	16364	310.9	695.4	562.1	27 950.5	97.2
	Cyprus	499	19.2	4.1	-1.1	956.0	0.6
	Spain	2002	49.5	1.5			1.1
Total 0-12		29944	723.1	1 129.3	837.7	45 457.2	154.0
12-24m	Italy	4568	779.6	799.4	471.0	14 261.3	172.8
	France	77	20.0	18.9	8.7	271.0	n.a.
	Greece	745	106.0	177.1	130.8	4 203.5	63.9
	Cyprus	50	12.3	3.1	0.7	176.0	0.7
	Spain	1079	162.0	72.5			40.8
Total 12-24m		6519	1 080.0	1 070.9	611.2	18 911.7	278.2
24-40 m	Italy	398	158.5	189.2	101.2	2 615.9	40.5
	France	83	28.0	47.0	23.1	1 254.0	n.a.
	Greece	146	44.1	76.3	101.4	1 214.3	26.3
	Cyprus						
	Spain	377	57.8	20.6			9.0
Total 24-40m		1004	288.4	333.0	225.8	5 084.1	75.8
> 40 m	Spain	3	2.4	0.8			0.2
Total > 40 m		3	2.4	0.8			0.2
Regional total		37 470	2 093.9	2 534.0	1 674.7	69 453	508.2

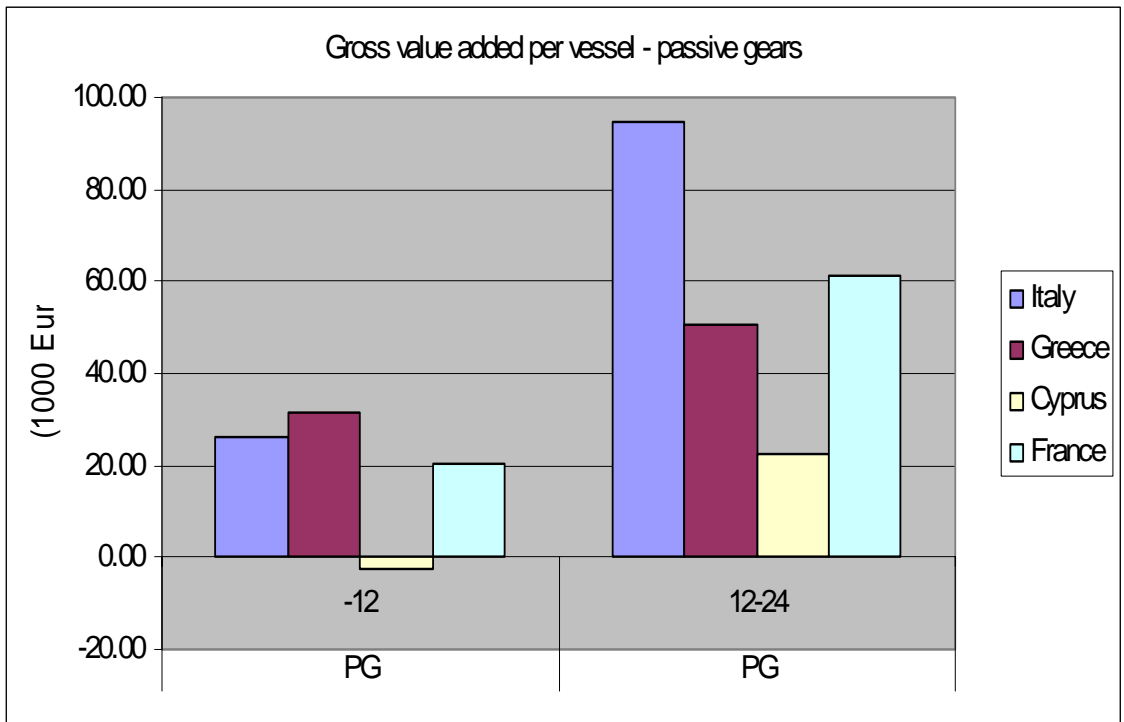
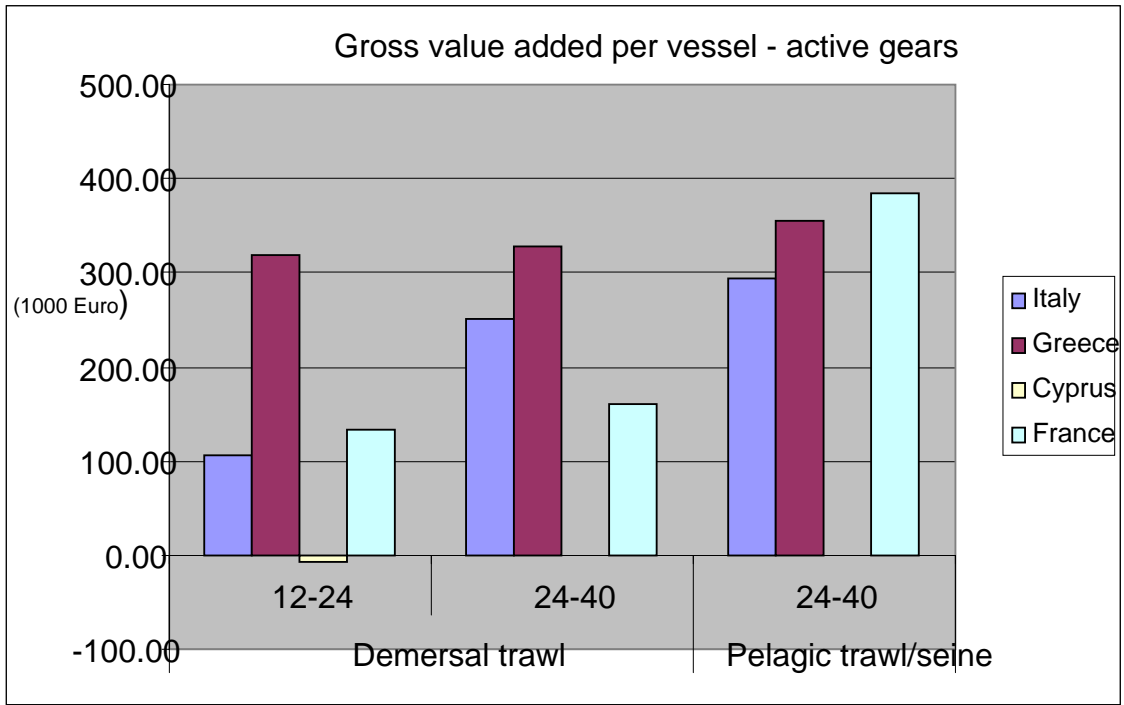
* France data refer to FTE and not to engaged crew

Demersal trawl					
	Size	Country	Income / vessel	GVA / vessel	Crew costs / engaged crew*
	12-24	Italy	192 706.1	107 047.4	17 549.9
		Greece	493 308.0	318 251.1	9 968.4
		Cyprus	75 432.0	-107 560.3	5 438.0
		France	303 032.9	133 612.8	28 346.8
		Spain	53 521.6		
	24-40	Italy	495 187.0	251 334.6	18 804.5
		Greece	516 410.3	328 415.8	9 532.4
		Cyprus			
		France	441 863.7	159 272.0	27 923.8
		Spain	86 942.9		
Pelagic trawl and seine					
	Size	Country	Income / vessel	GVA / vessel	Crew costs / engaged crew*
	24-40	Italy	419 099.3	292 916.7	20 543.5
		Greece	548 327.9	354 727.3	6 547.0
		Cyprus			
		France	676 042.0	384 864.8	42 246.8
		Spain	278 482.9		
Passive gears					
	Size	Country	Income / vessel	GVA / vessel	Crew costs / engaged crew*
	0012	Italy	37 247.4	26 257.3	7 951.9
		Greece	43 020.0	31 250.0	2 170.0
		Cyprus	8 140.0	-2 239.3	537.2
		France	29 091.8	20 487.8	11 782.8
		Spain	2 174.9		
	24-40	Italy	147 328.8	94 521.4	13 230.3
		Greece	80 695.8	50 763.8	3 351.4
		Cyprus	54 311.0	22 600.4	16 176.2
		France	101 780.2	61 392.8	23 250.3
		Spain	90 608.0		

* France data refer to FTE and not to engaged crew







6. APPENDIX OF THE MAIN ECONOMIC INDICATORS PER FLEET AND COUNTRY