



Manuscript completed in April 2021.

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PDF ISBN 978-92-76-35969-2 doi:10.2771/740066 KL-05-21-092-EN-N

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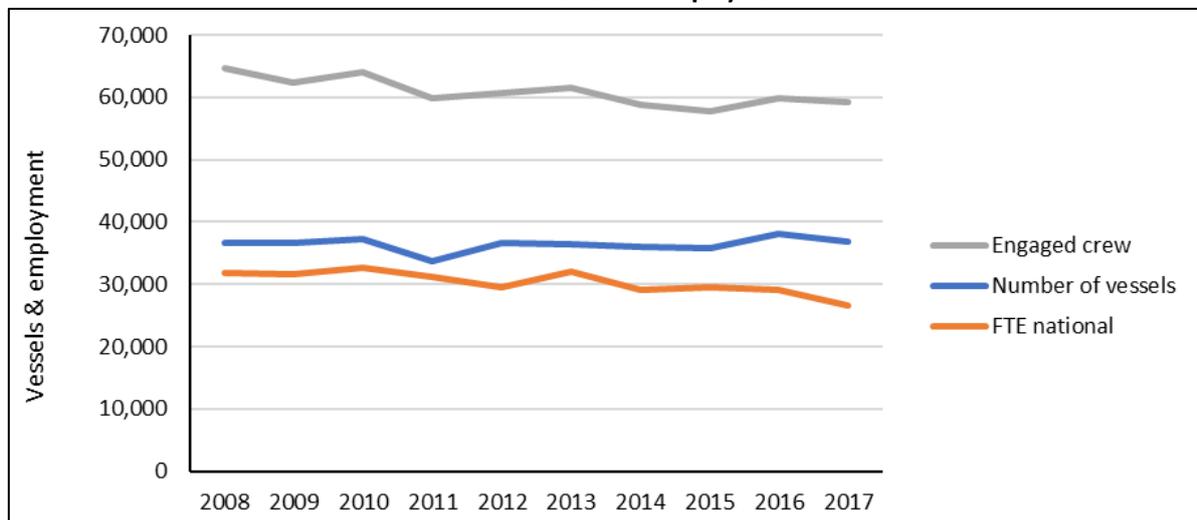
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This Annex applies the same definition of Small-Scale Coastal Fleet (SSCF) as described in the main report.

## Total EU<sup>1</sup>

In 2017, the EU SSCF totalled 36,800 vessels employing 59,000 fishers (26,500 full-time equivalents). This level of employment and capacity has been declining over the past decade, continuing a longer-term trend in EU fisheries.

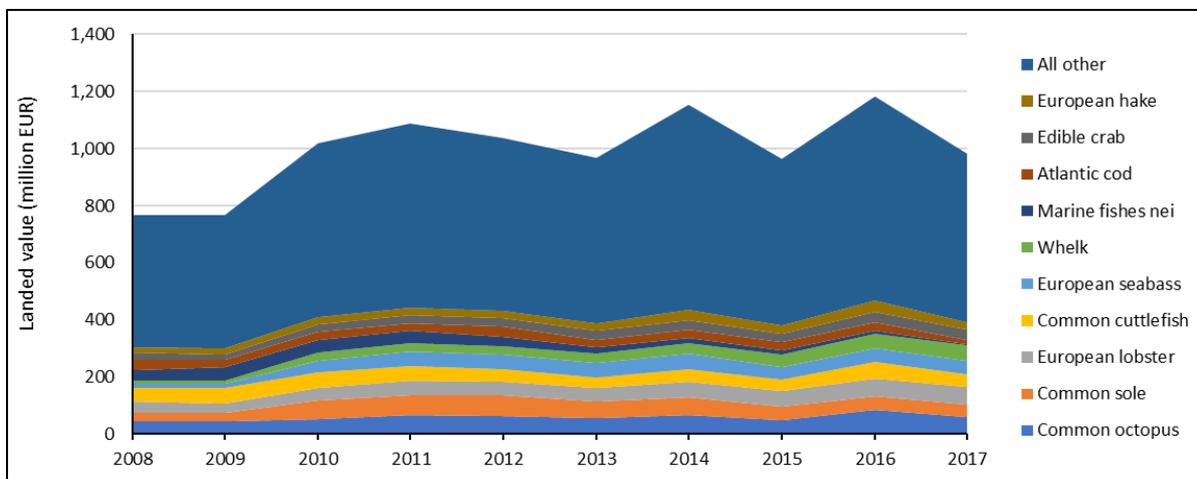
**EU SSCF vessels and employment**



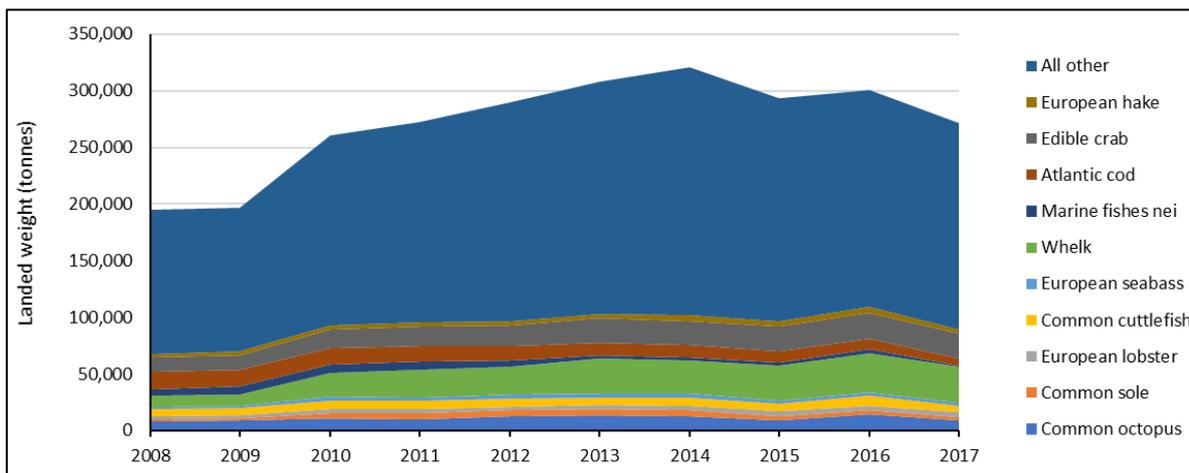
Source: Authors' calculations based on STECF, 2019.

The largest species by value for the EU SSCF are octopus, sole, European lobster, cuttlefish, seabass, and – dramatically increasingly – whelks. By tonnage whelks and crabs take the top two spots.

**EU SSCF landings by value and quantity**



<sup>1</sup> The EU Member States Austria, Czechia, Hungary, Luxembourg, and Slovakia are not included as they have no marine fisheries and Belgium is not included as it has no fleet segments that are defined as SSCF. Greece is included in the Member State analysis but is removed from the EU analysis (as in the STECF Annual Economic Report) due to unstable reporting. With over 12,000 SSCF vessels, Greece is the largest Member State in terms of SSCF vessels and employment in the EU.

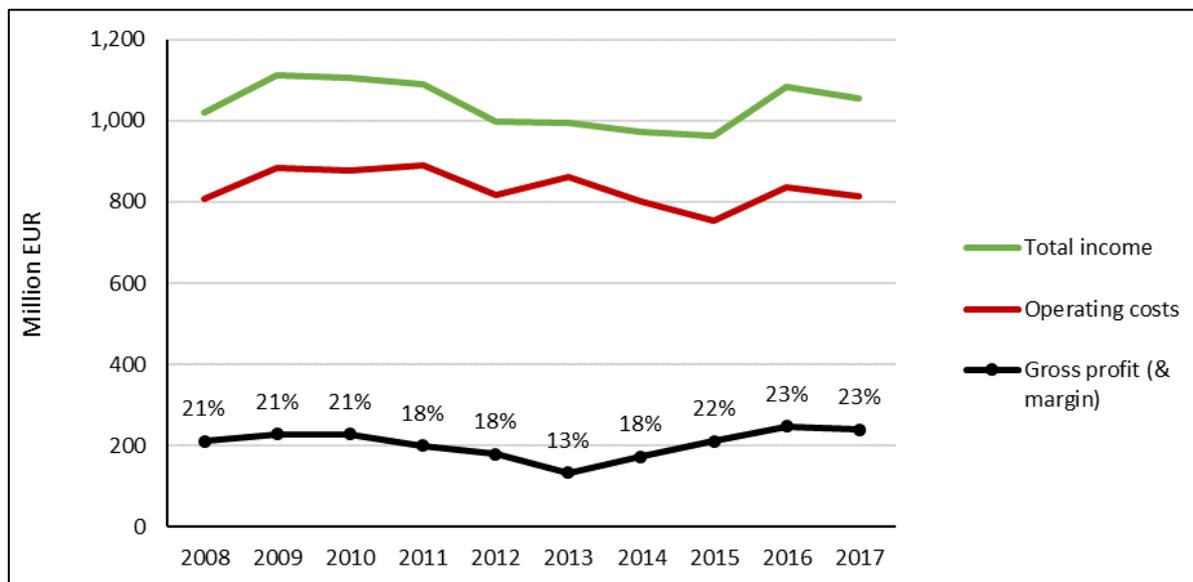


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The most commonly used fishing gears are trammel nets and set gillnets, followed by pots, set longline and hand lines (STECF, 2019). Often fishers will use multiple gears, sometimes even on the same fishing trip. SCFF fishing vessels are often operated single-handed and operate close to landing ports. Fishing businesses are typically small and family-run.

Taken as a whole, the economic performance of the EU SCFF is relatively stable with total income around fluctuating around EUR 1 billion, costs around EUR 0.8 billion and operating profits (not including capital costs) around EUR 0.2 billion for a 20% profit margin.

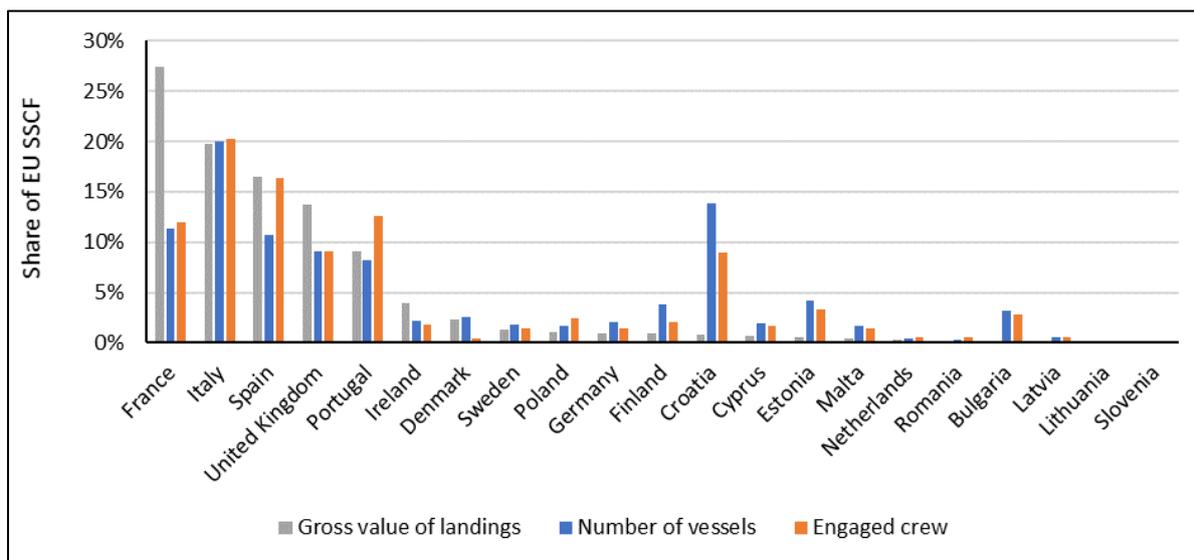
**EU SSCF economic performance**



Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Compared to the rest of the EU fishing industry, the SSCF typically sells in smaller quantities but at higher prices. Although trending upward, profitability is lower for the SSCF than the rest of the EU fishing industry (STECF, 2019).

**Member State share of EU SSCF**

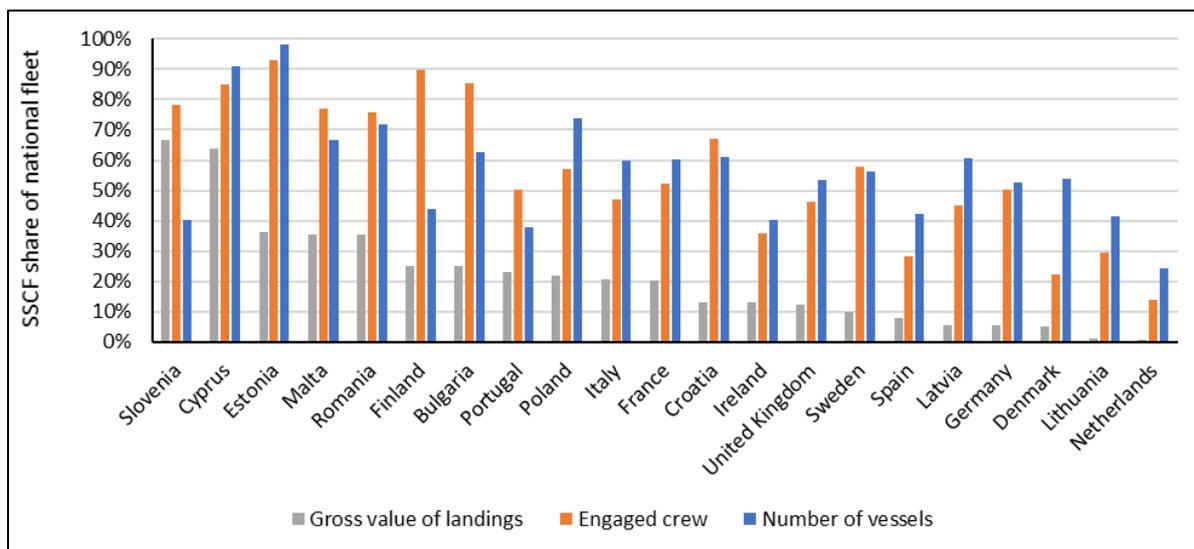


Source: Authors' calculations based on STECF, 2019.

France, Italy, Spain, the United Kingdom, and Portugal are the largest Member States in terms of landed value, composing 87% of the total EU SSCF landed value (excluding Greece). These Member States compose a smaller share of vessels (59%) and employment (70%).

Within EU Member States, the SSCF often represents a significant share of fishing activity. This is particularly the case for the number of vessels (EU SSCF share is 54%) and employment (EU SSCF share is 46%) but not landed value (13%). There is also a range across Member States from Slovenia and Cyprus where the SSCF compose the majority of landed value to Lithuania and the Netherlands where the SSCF composes just 1% of landed value. In many Member States, the SSCF composes the majority of the fishing vessels.

**SSCF share of Member State fisheries**



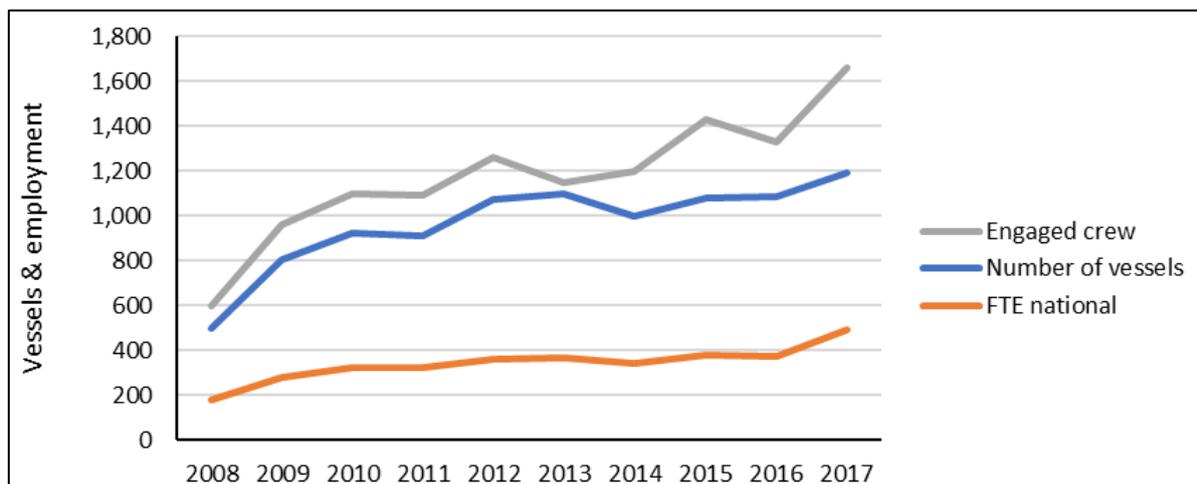
Source: Authors' calculations based on STECF, 2019.

The fleet structure and economics of the SCCF vary significantly by Member State. The Country fiches that follow detail these characteristics at the Member State level. Note that due to inconsistent data reporting, Greece, which has a large SSCF, is not included in the total EU figures but is included in the Member State overview that follows.

## Bulgaria

In 2017, the Bulgarian SSCF consisted of 1,191 vessels employing 1,660 fishers (490 full-time equivalents). Both employment and capacity have been increasing over the last decade, in contrast to the overall EU trend.

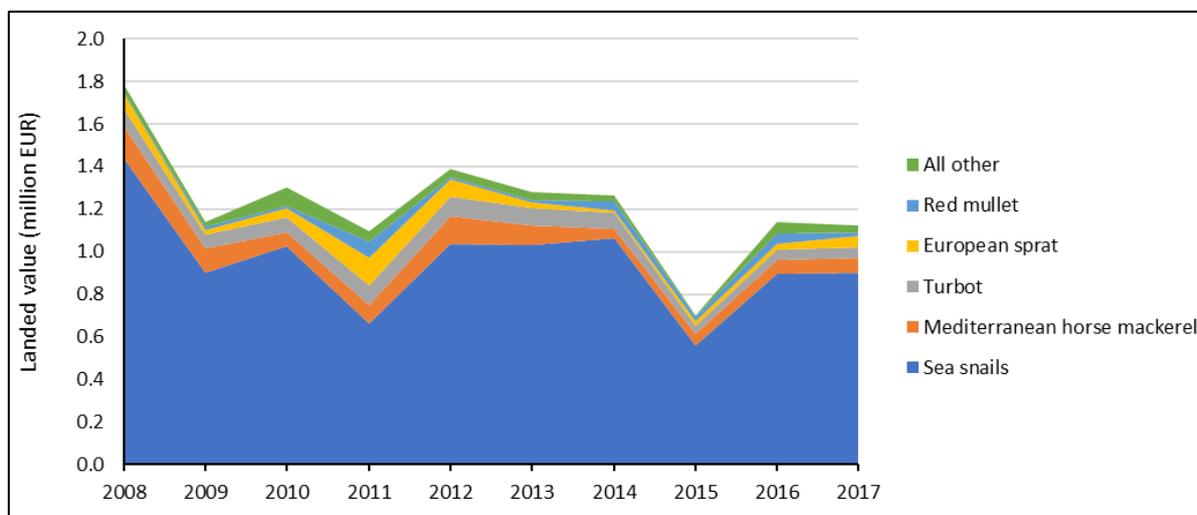
**Bulgarian SSCF vessels and employment**

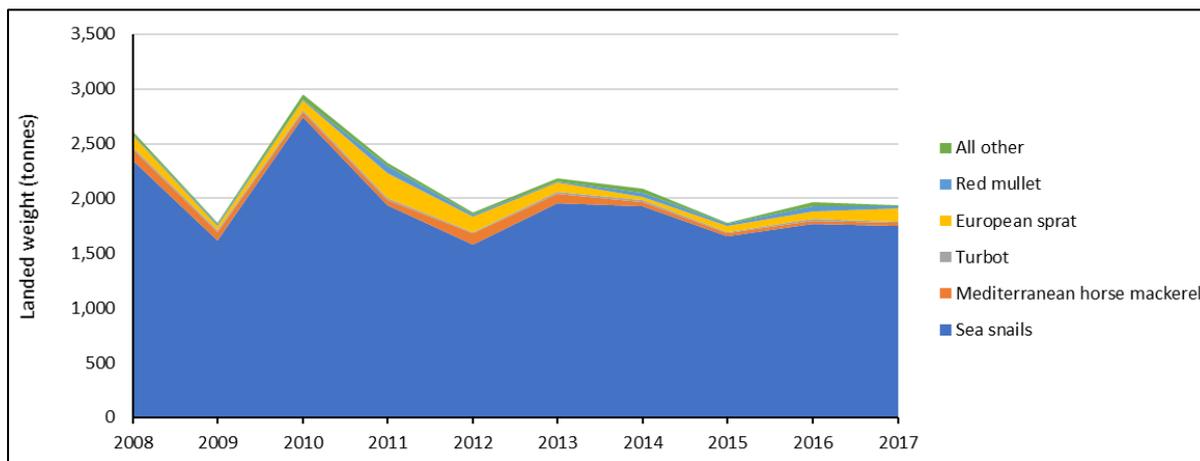


Source: Authors' calculations based on STECF, 2019.

The main fishery by both quantity and value is the hand dove sea snail fishery. Other SSCF fisheries include horse mackerel, turbot, sprat, and mullet, mainly caught using anchored gillnets.

**Bulgarian SSCF landings by value and quantity**

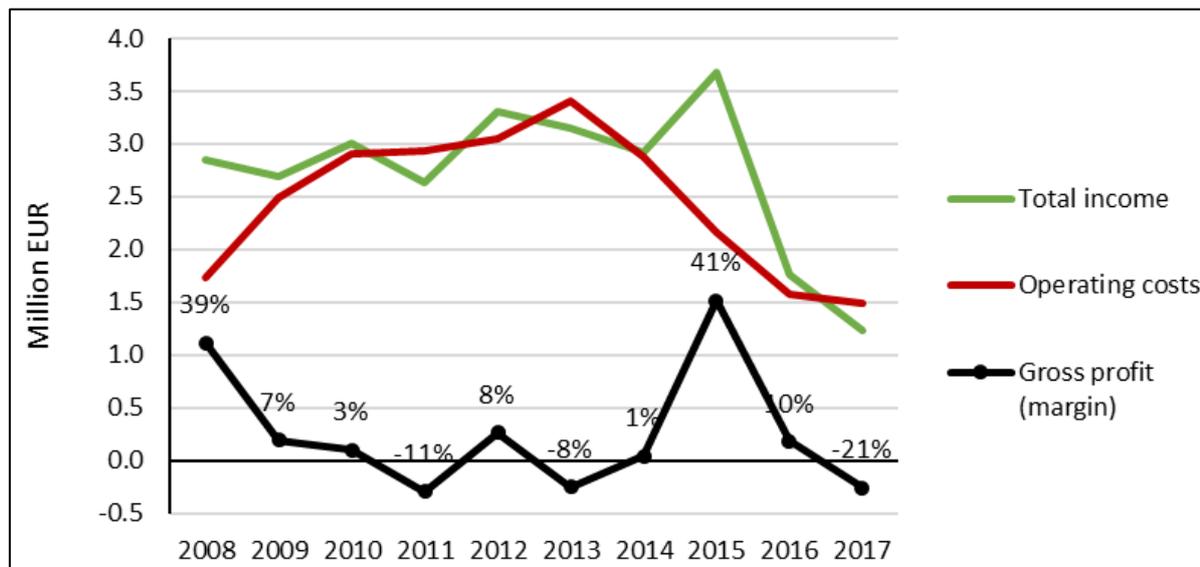




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Bulgarian SSCF fluctuates significantly with gross profit margins as high as 41% (in 2015) and as low as -11% (in 2011).

**Bulgarian SSCF economic performance**

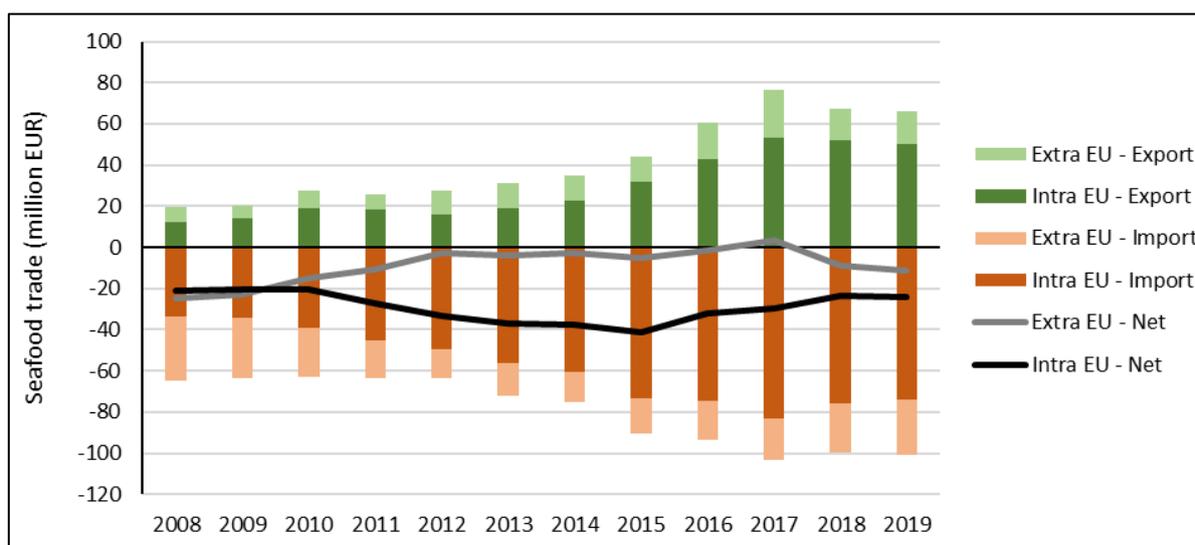


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Issues identified for the economic performance of the Bulgarian SSCF include a lack of domestic market for local seafood production, a lack of organisation in fisher associations, and a lack of interest in the fishing industry from local authorities and the financial sector. There is also a lack of interest from young, potential entrants, compounded by low wages in the sector (STECF, 2019).

Fish imports are a significant concern for the Bulgarian SSCF, with national fisheries experts noting that imports have “a lower price than the price of Bulgarian catches from the Black Sea and for the fishers is impossible to compete in this respect, even after processing and added value.” (STECF, 2019). Over the last decade, seafood imports have increased, while at the same time seafood exports from Bulgaria have increased at approximately the same rate.

**Bulgarian intra and extra EU seafood trade**



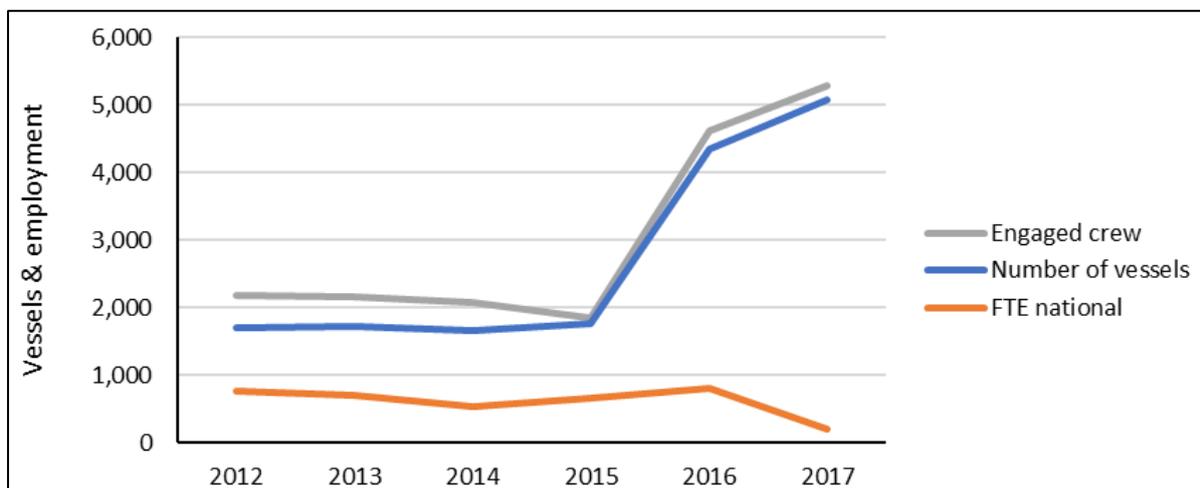
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are mackerel (Norway, Iceland, Peru), coldwater shrimp (Canada), hake (Argentina), catfish (Viet Nam), and mussels (Chile) (Eumofa, 2020a).

## Croatia

In 2017, the Croatian SSCF consisted of 5,085 vessels employing 5,290 fishers (217 full-time equivalents). The dramatic increase in vessels and fishers in 2015 is attributed to 3,500 SSCF vessels that were transferred into the commercial SSCF. These fishers were operating at low levels of activity, but their inclusion complicates historical economic analysis.

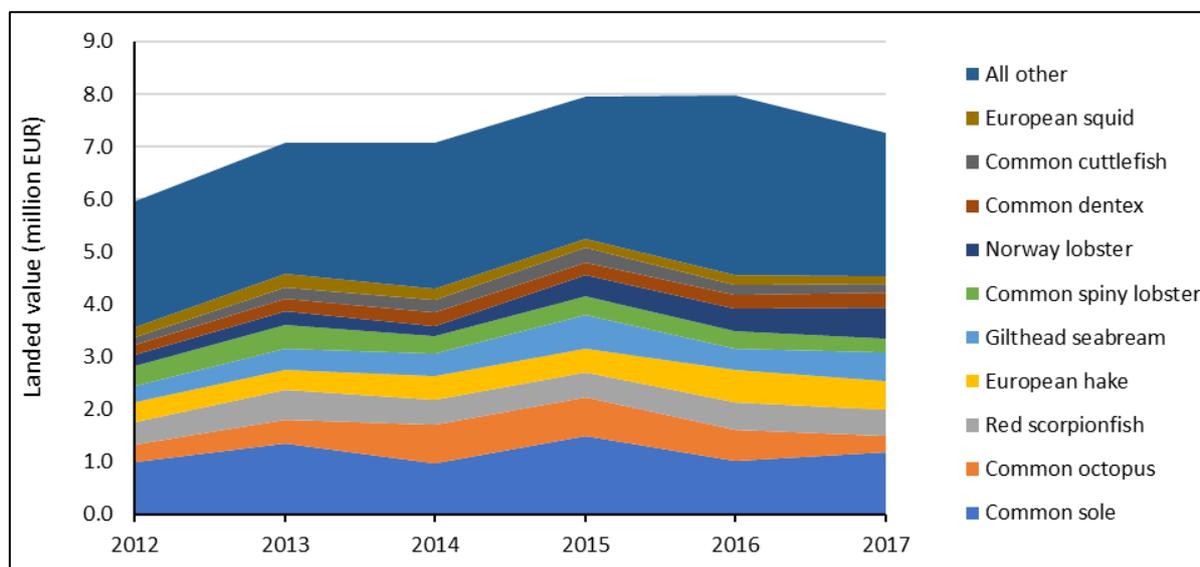
**Croatian SSCF vessels and employment**

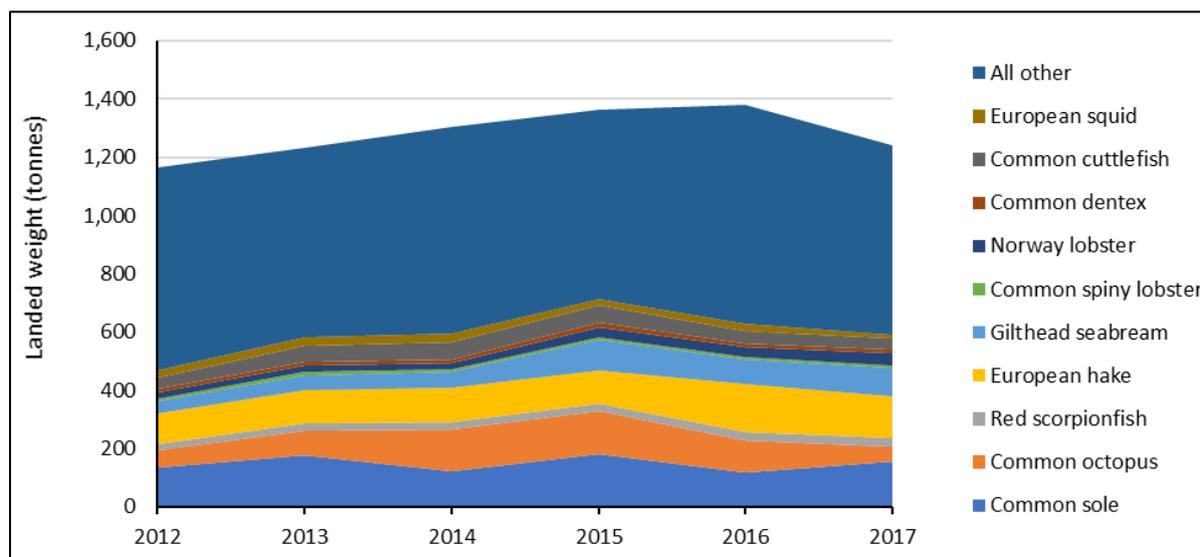


Source: Authors' calculations based on STECF, 2019.

The main fishery by both quantity and value is the sole fishery. Other SSCF fisheries include octopus, scorpionfish, hake and gilthead seabream. Most SSCF vessels fish using fixed nets.

**Croatian SSCF landings by value and quantity -**

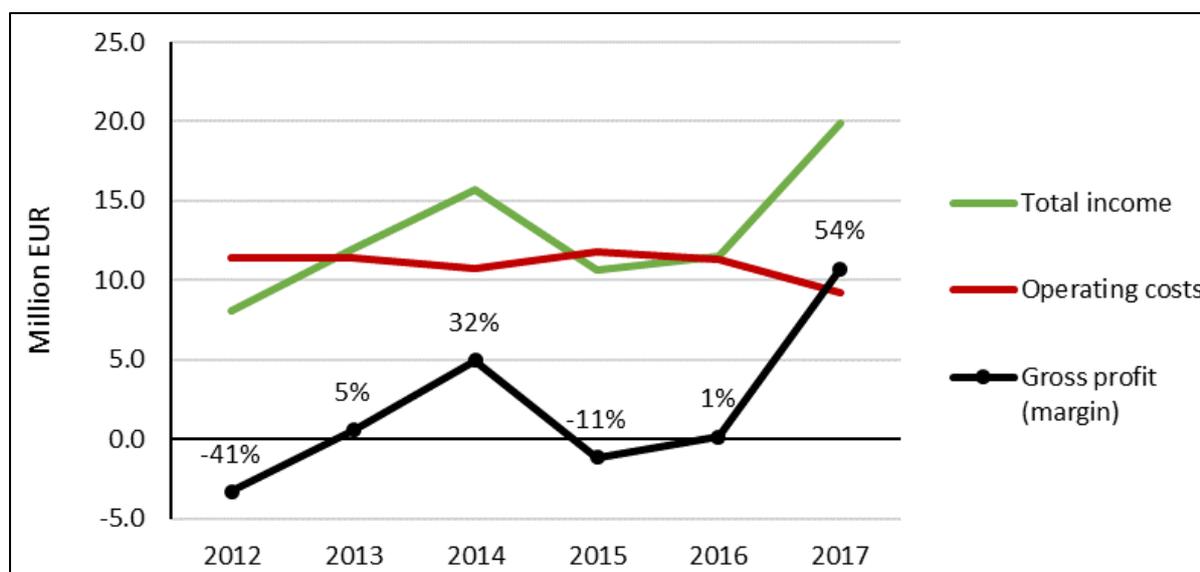




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Croatian SSCF has fluctuated significantly in recent years with gross profit margins as high as 54% (in 2017) and as low as -41% (in 2012). Some of this variance in economic performance is likely due to inconsistencies in data reporting. It is also important to recognise that much of the SSCF is artisanal and it not viewed within the traditional economic context.

**Croatian SSCF economic performance -**



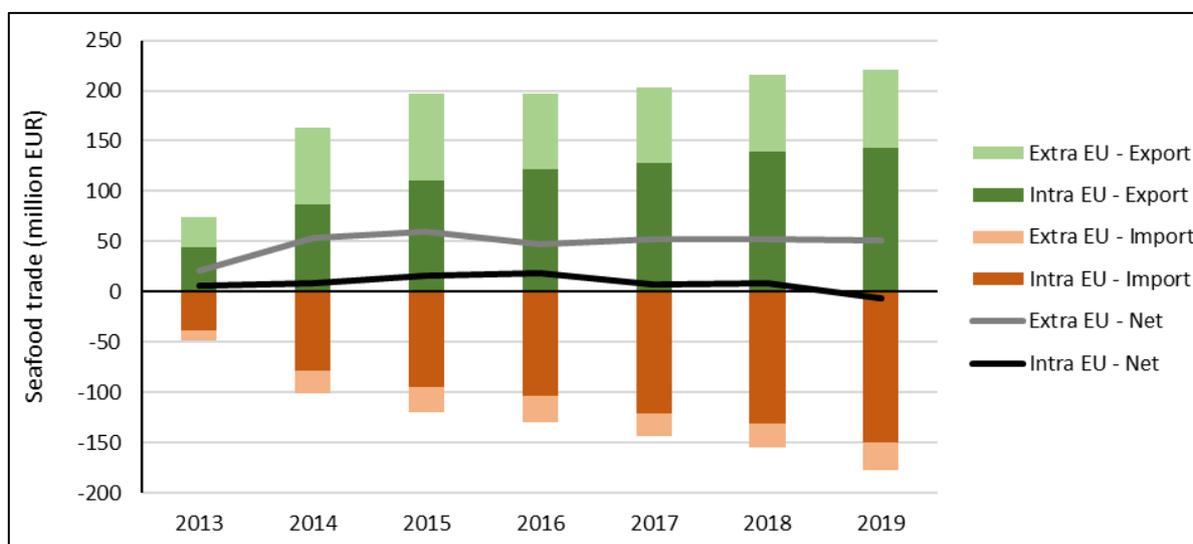
Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Issues identified for the economic performance of the Croatian SSCF are largely related to the overexploitation of fish stocks and the subsequent management measures. Fish prices are seen as determined by the much larger Italian market. National fisheries experts do not identify seafood imports as a significant issue for the Croatian fishing fleet (STECF, 2019).

Unlike most MS, Croatia is a net exporter of seafood outside the EU. This is partly explained by Croatia's close proximity to several non-EU nations as well as its long coastline and comparatively large fishing industry.

Over the last decade, seafood imports have increased, while at the same time seafood exports from Croatia increased at approximately the same rate.

#### Croatian intra and extra EU seafood trade



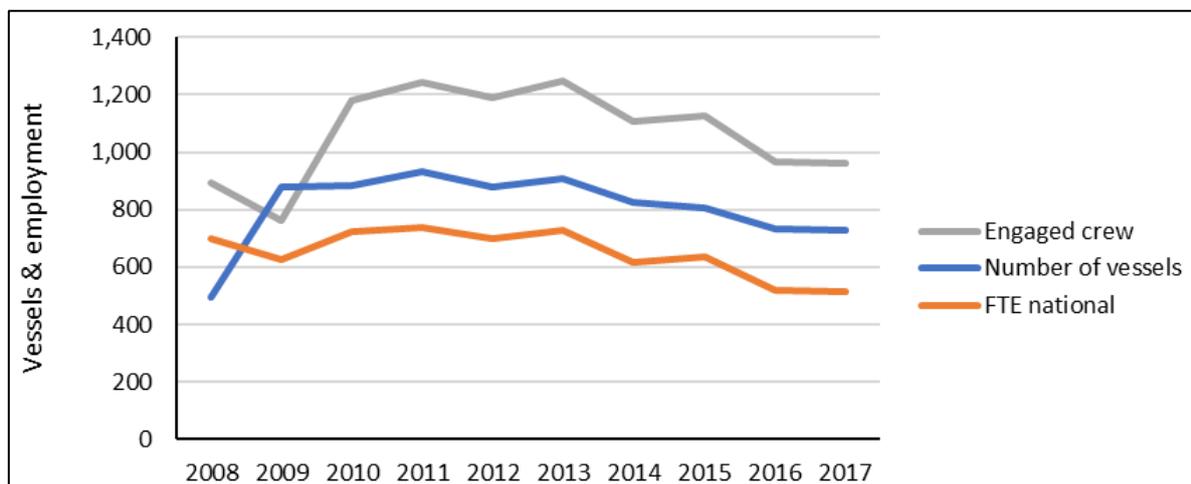
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are squid (South Africa), hake (Argentina), tuna (Thailand, Ecuador), and salmon (China, Serbia) (Eumofa, 2020a).

## Cyprus

In 2017, the Cyprian SSCF consisted of 728 vessels employing 962 fishers (517 full-time equivalents). Both employment and capacity have been decreasing, following the EU trend. Cyprus has one of the highest proportions of SSCF in its fleet (95% of the vessels and 55% of the landed value).

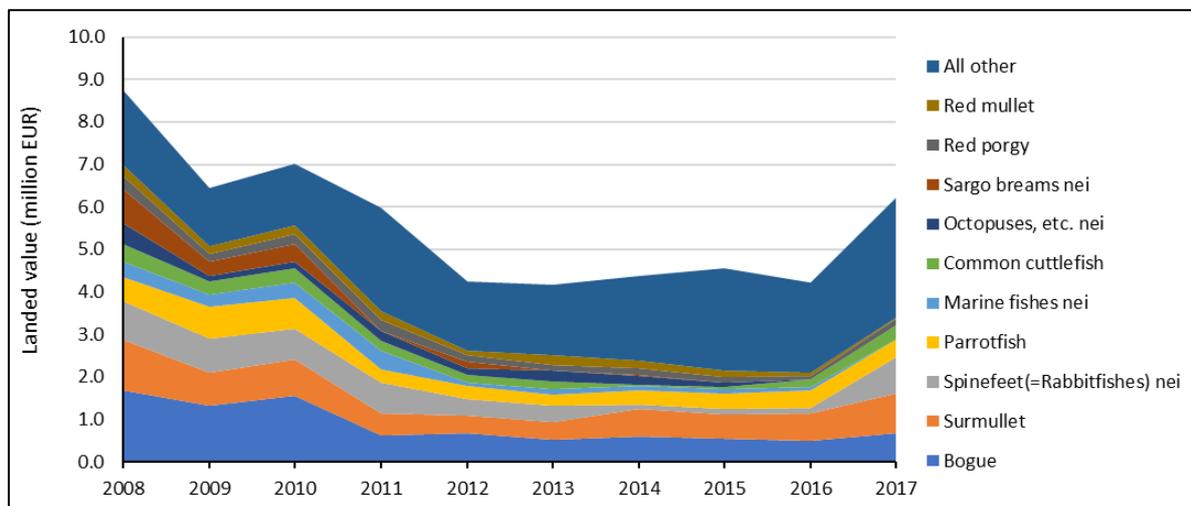
**Cyprian SSCF vessels and employment**

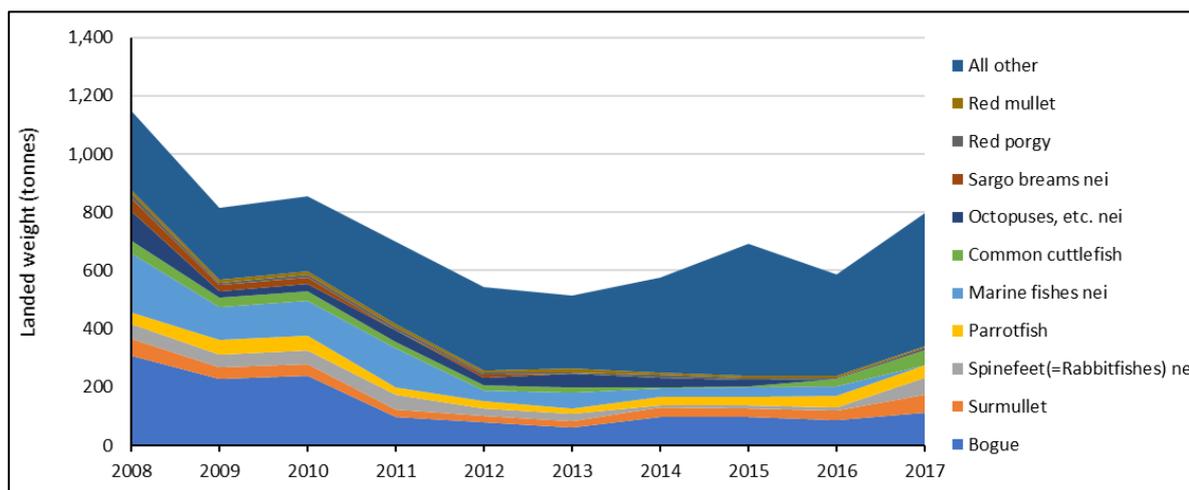


Source: Authors' calculations based on STECF, 2019.

The main fishery by quantity and value is the bogue fishery. Other SSCF fisheries include surmullet, spinefeet, and parrotfish. The main gears are trammel nets, set gillnets, and set longlines.

**Cyprian SSCF landings by value and quantity**

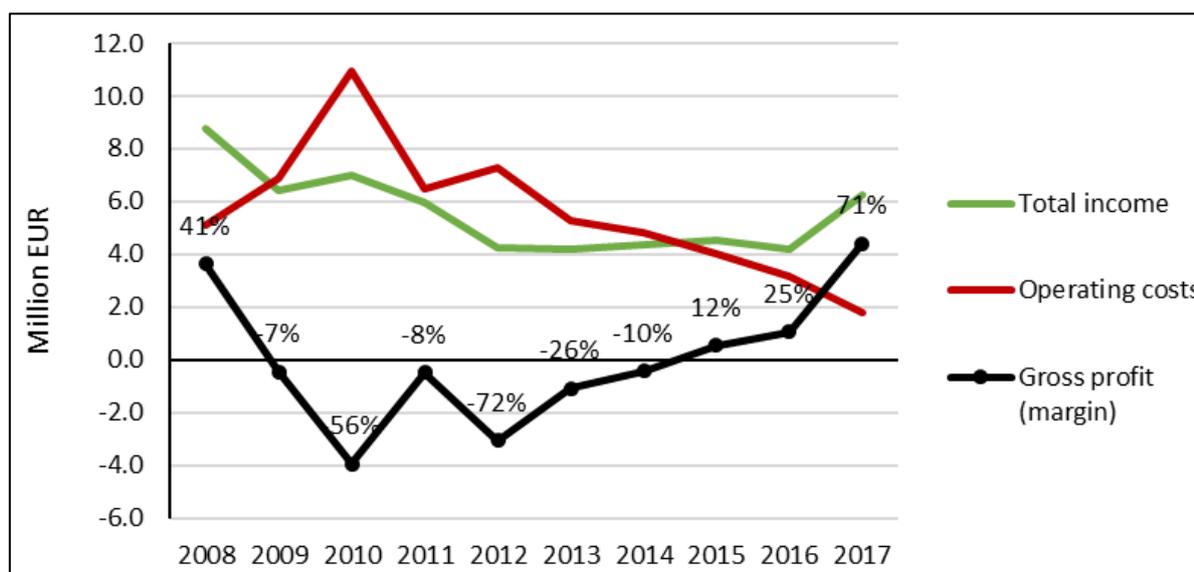




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Cyprian SSCF has fluctuated significantly in recent years with gross profit margins as high as 71% (in 2017) and as low as -72% (in 2012) but has been increasing for six continuous years.

#### Cyprian SSCF economic performance

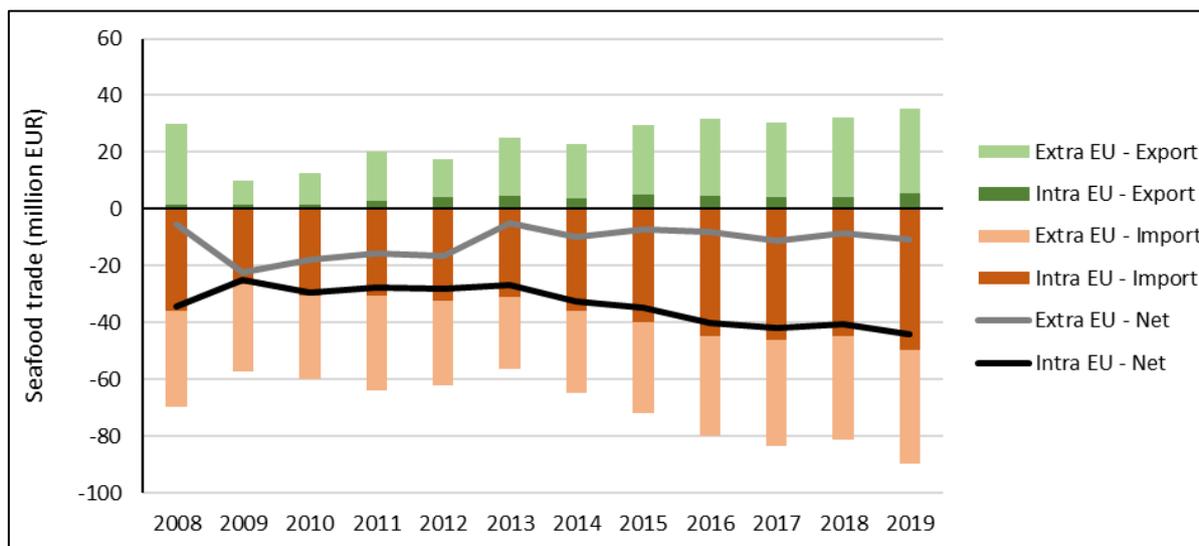


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Fisheries in Cyprus are heavily oriented towards the SSCF, with the majority of landed value and 90% of vessels in the SSCF (second in the EU by gross value of landings, engaged crew and number of vessels). The market for fish in Cyprus is mostly for fresh fish as the processing industry is in early stages. While prices are declining, they are generally higher than other Mediterranean countries. In general, investment in the industry is low. National fisheries experts do not identify seafood imports as a significant issue for the Cyprian fishing fleet (STECF, 2019).

Despite being an island nation, Cyprus is a net importer of seafood at both intra-EU and extra-EU. Over the last decade there has been a significant increase of intra-EU imports to Cyprus while intra-EU exports remain marginal.

**Cyprian intra and extra EU seafood trade**



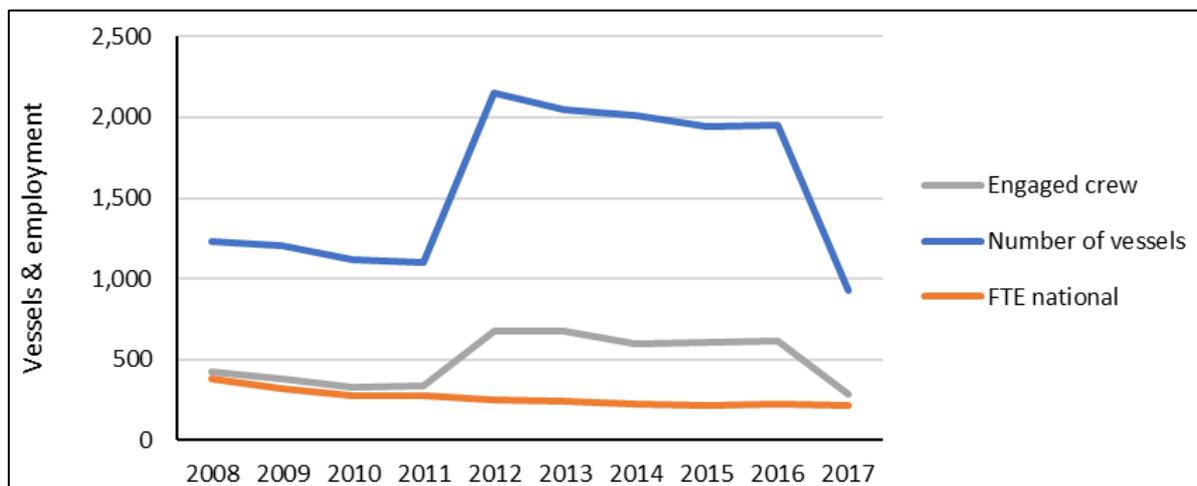
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are warmwater shrimp (Bangladesh, Viet Nam), squid (Thailand, India), octopus (Indonesia, Tunisia), and salmon (Norway) (Eumofa, 2020a).

## Denmark

In 2017, the Danish SSCF consisted of 926 vessels employing 290 fishers (214 full-time equivalents). Due to fleet classification issues these measures have been fluctuating dramatically, although FTE employment, which is based on activity, has been slowly declining in line with the overall EU trend.

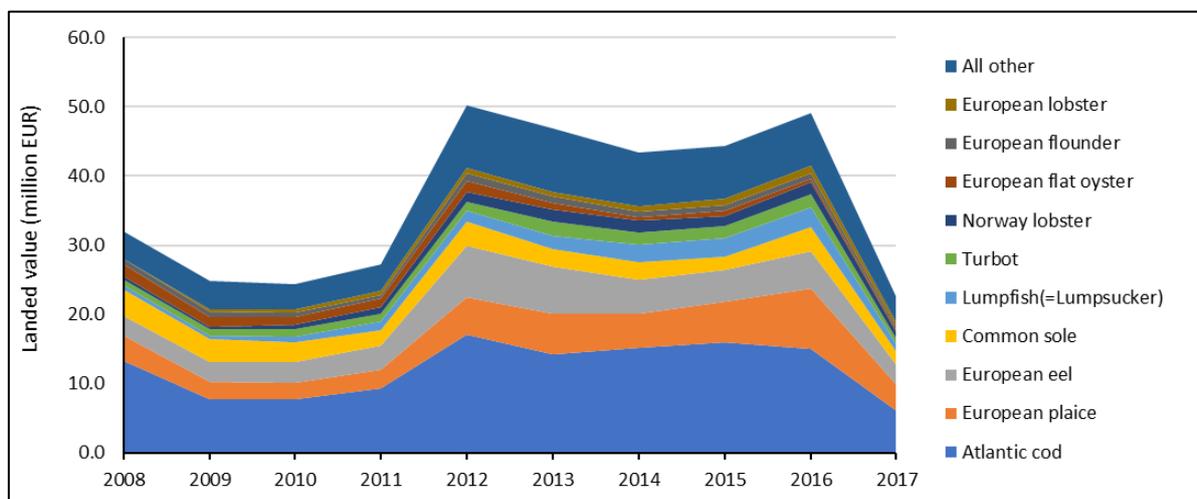
**Danish SSCF vessels and employment**

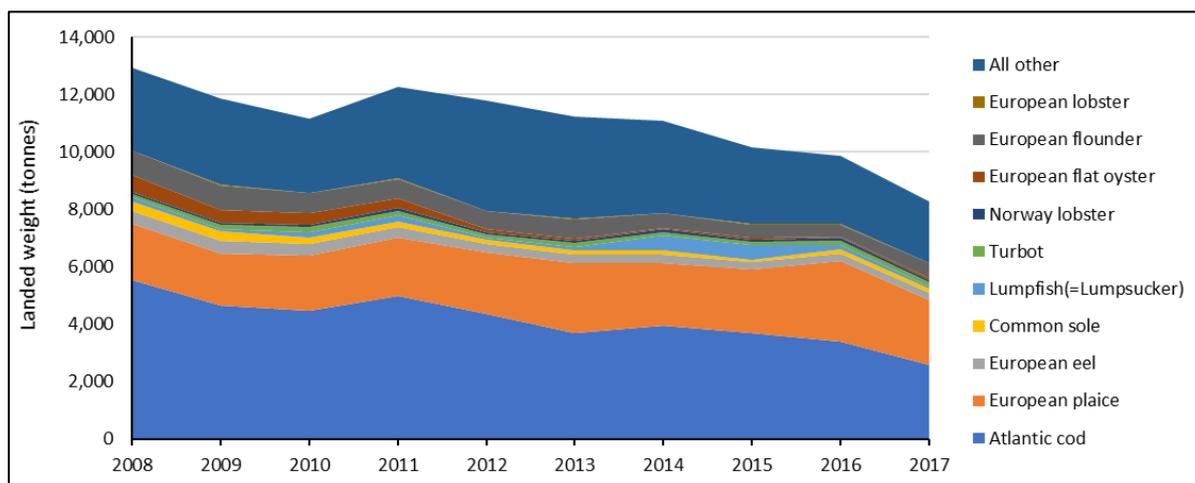


Source: Authors' calculations based on STECF, 2019.

The main fishery by quantity and value is the demersal fishery for cod, plaice and sole. Other SSCF fisheries include eel and lumpfish. Landed weight has been steadily declining.

**Danish SSCF landings by value and quantity**

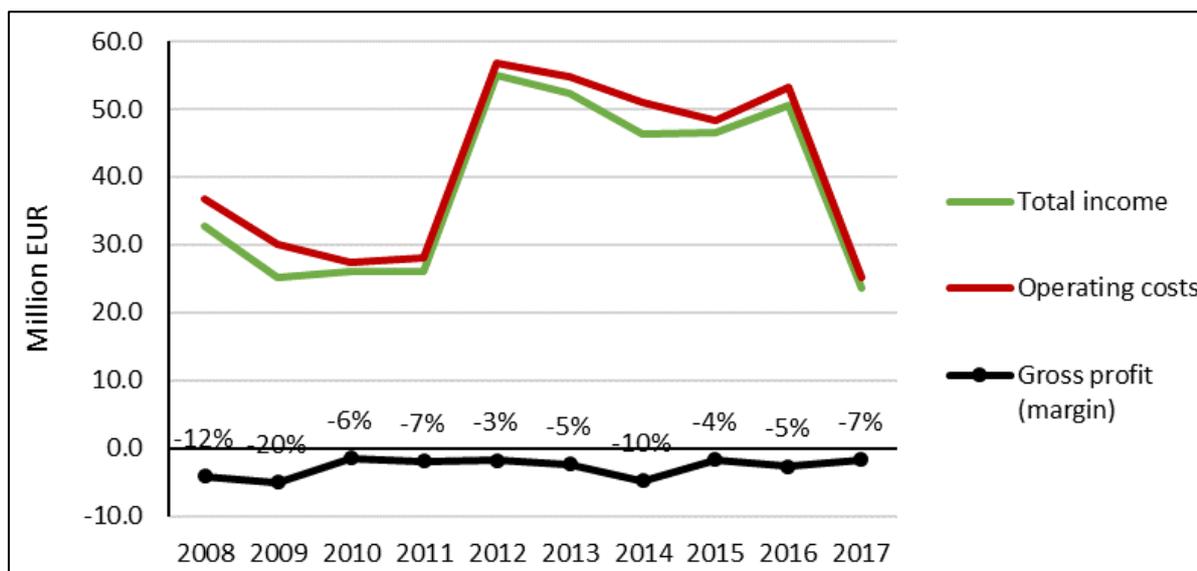




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Danish SSCF has fluctuated significantly corresponding with the fleet classification issue. Regardless, gross profits and gross profit margins have remained consistently low with the Danish SSCF unprofitable for the whole time series.

**Danish SSCF economic performance**

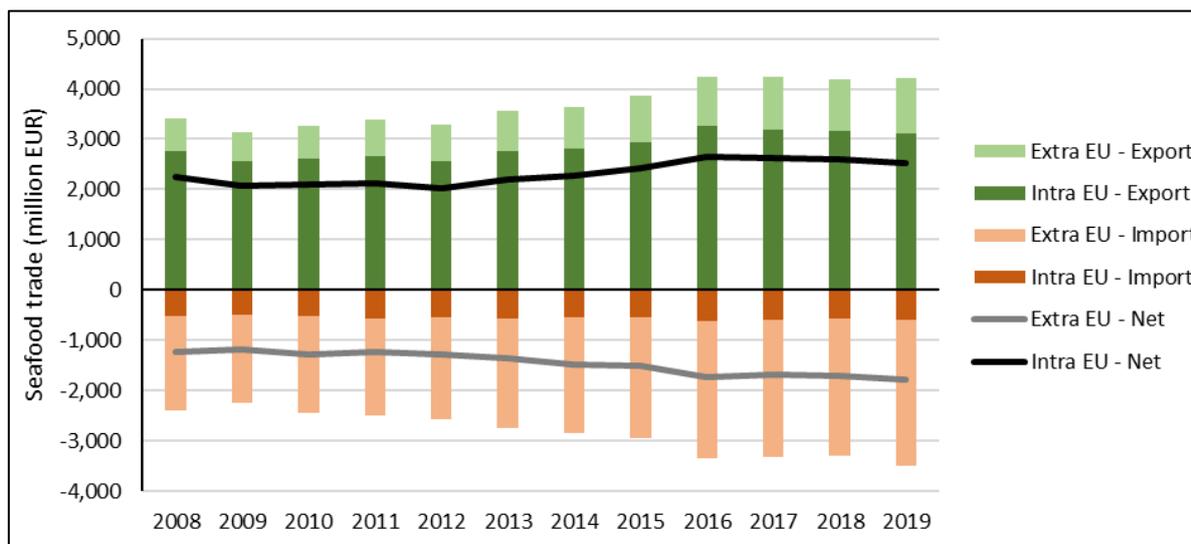


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Compared to other Member States, the SSCF in Denmark is a small share of the national fishery, comprising just 4% of total landed value.

Denmark is simultaneously a net exporter of seafood at the intra EU level and a net importer of seafood at the extra EU level. This trend has been stable throughout the last decade.

**Danish intra and extra EU seafood trade**



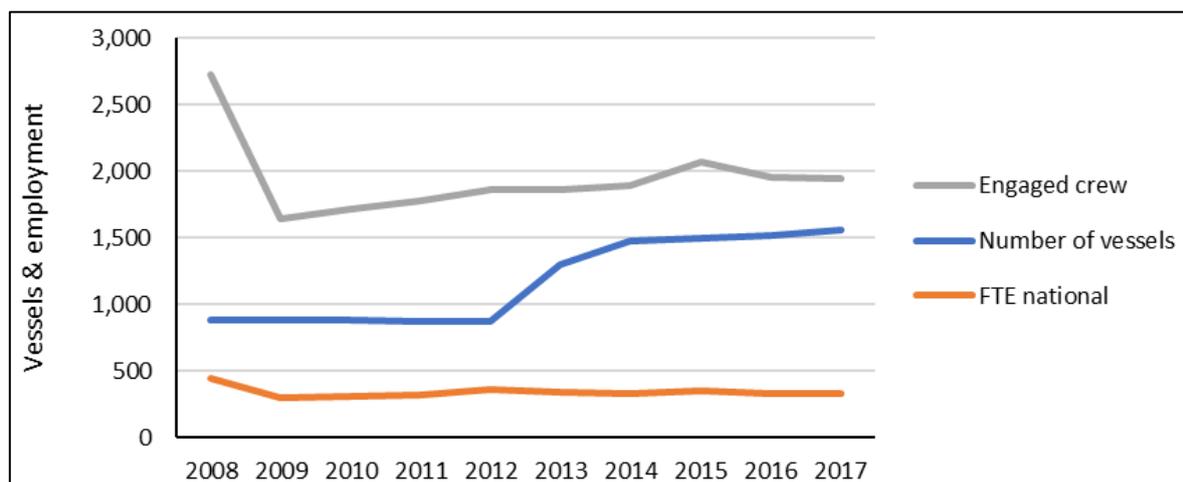
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are salmon (Norway), cod (Norway), shrimp (Greenland, Canada), Greenland halibut (Greenland), and fish oil (Peru, United States) (Eumofa, 2020a).

**Estonia**

In 2017, the Estonian SSCF consisted of 1,557 vessels employing 1,950 fishers (332 full-time equivalents). Both employment and capacity have been increasing over the last decade, in contrast to the overall EU trend.

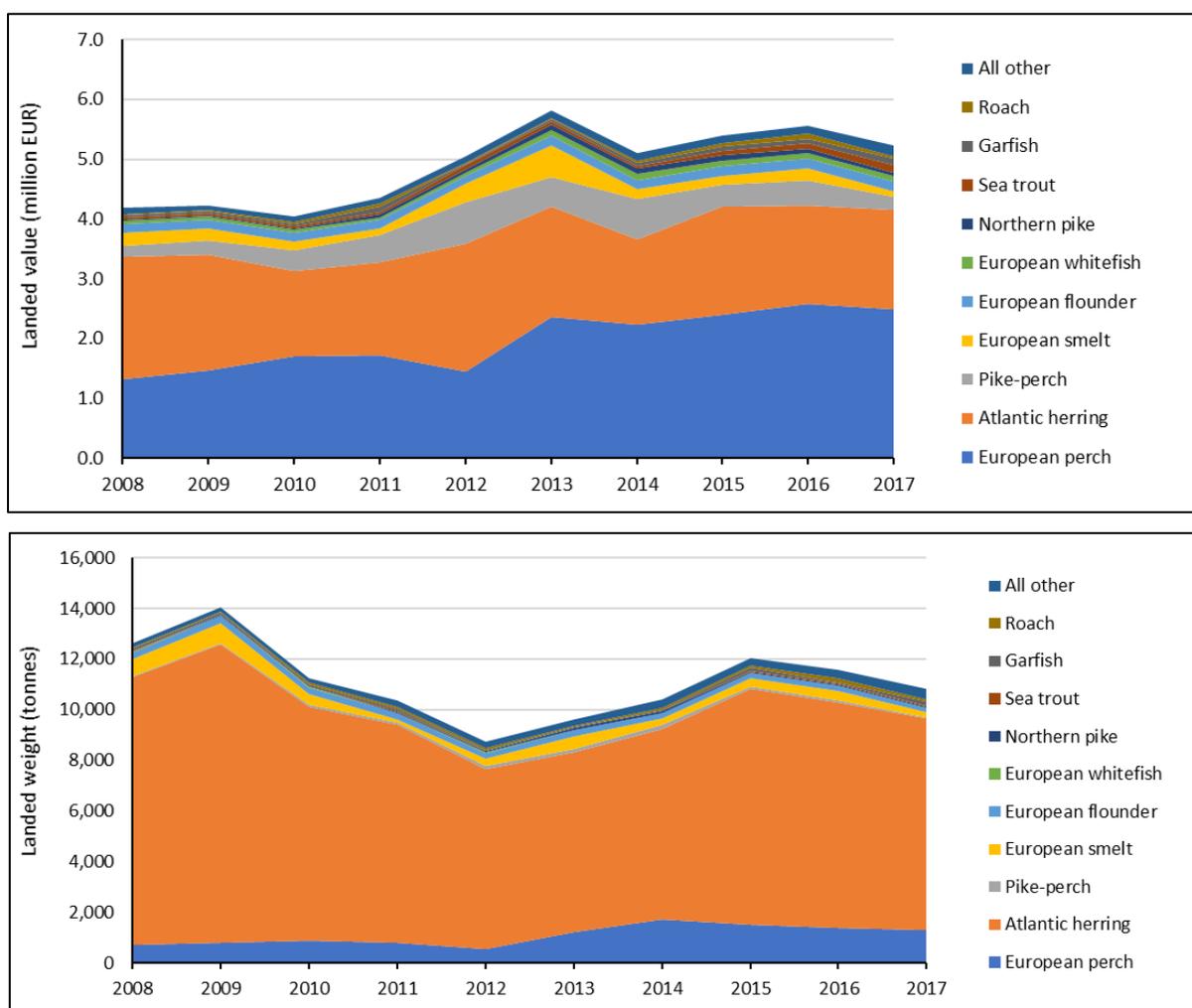
**Estonian SSCF vessels and employment**



Source: Authors' calculations based on STECF, 2019.

The two main SSCF fisheries by value are perch and herring. By weight, herring represents over 75% of landings.

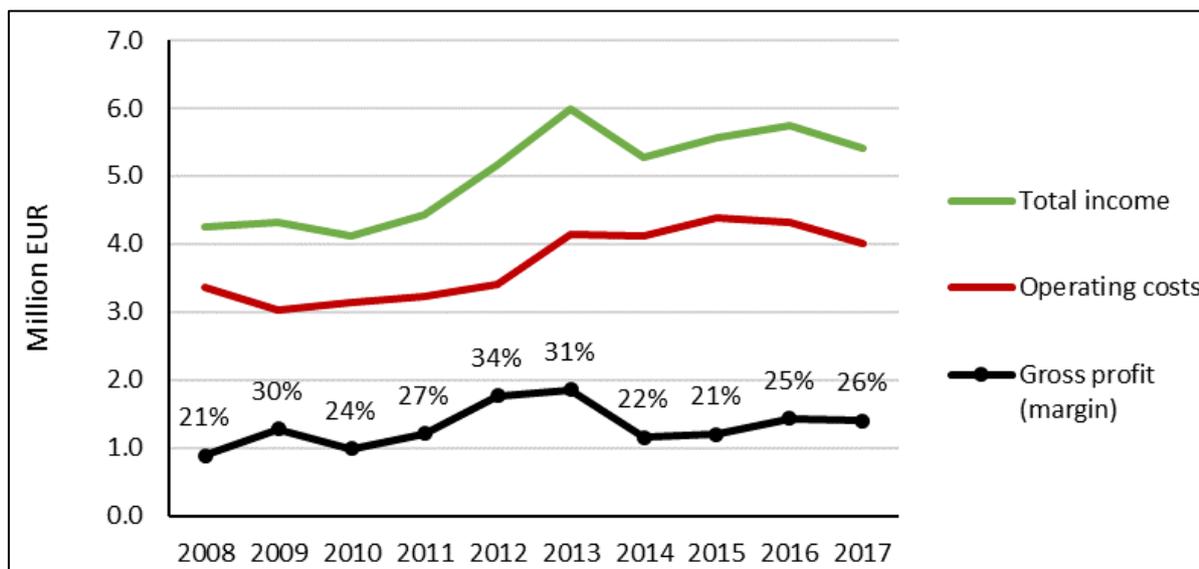
### Estonian SSCF landings by value and quantity



Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Estonian SSCF has steadily increased over the past decade with income reaching new highs and profits remaining healthy (26% profit margin in 2017).

**Estonian SSCF economic performance**

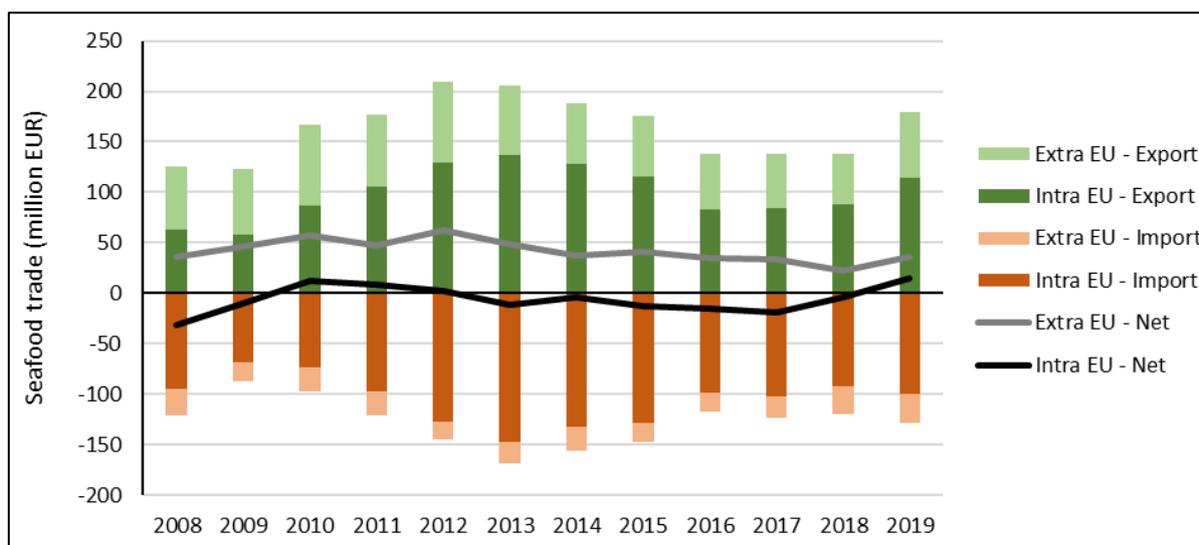


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The Estonia fishing fleet is mostly composed of SSCF vessels, with over 90% of vessels and fishers, ranking Estonia first in the EU on these measures.

The major trends affecting the Estonian SSCF are the total allowable catches for herring and prices in the export market. Russia used to be the largest export market but in recent years this has changed to Ukraine. Most of the catch landed is sold to fish freezing or processing companies, although some larger fishing companies are engaged in this part of the supply chain themselves. National fisheries experts do not identify seafood imports as a significant issue for the Estonian fishing fleet (STECF, 2019). While Estonia's intra-EU seafood trade is roughly balanced, Estonia is a consistent net exporter of seafood at the extra-EU level.

**Estonian intra and extra EU seafood trade**



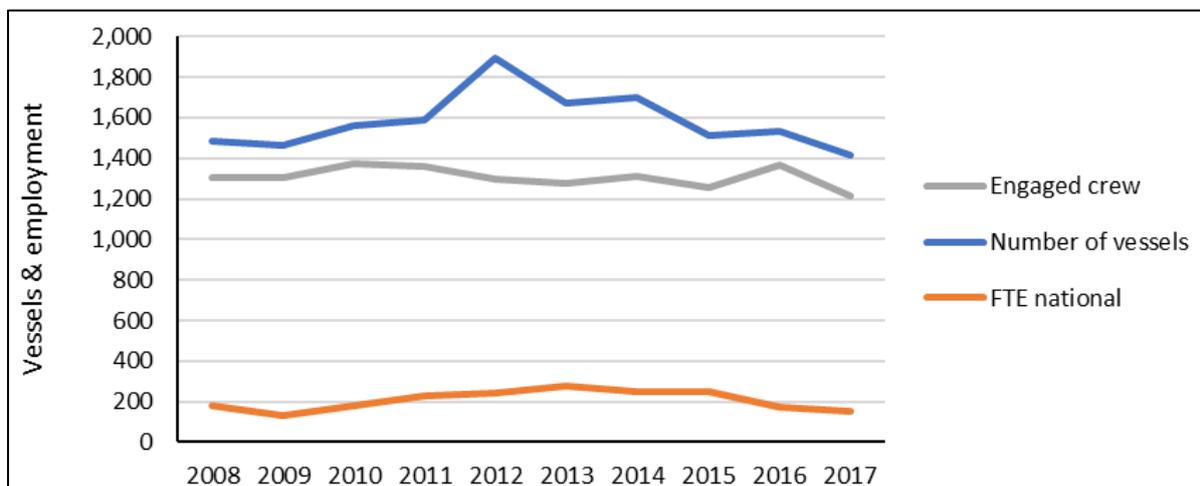
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are shrimp (Albania), Alaska pollock (United States), tuna (Viet Nam), and salmon (Faroe Islands, Norway) (Eumofa, 2020a).

## Finland

In 2017, the Finish SSCF consisted of 1,413 vessels employing 1,217 fishers (154 full-time equivalents). Both employment and capacity have been relatively stable over the past decade. Finland has one of the highest proportions of SSCF (96% of vessels).

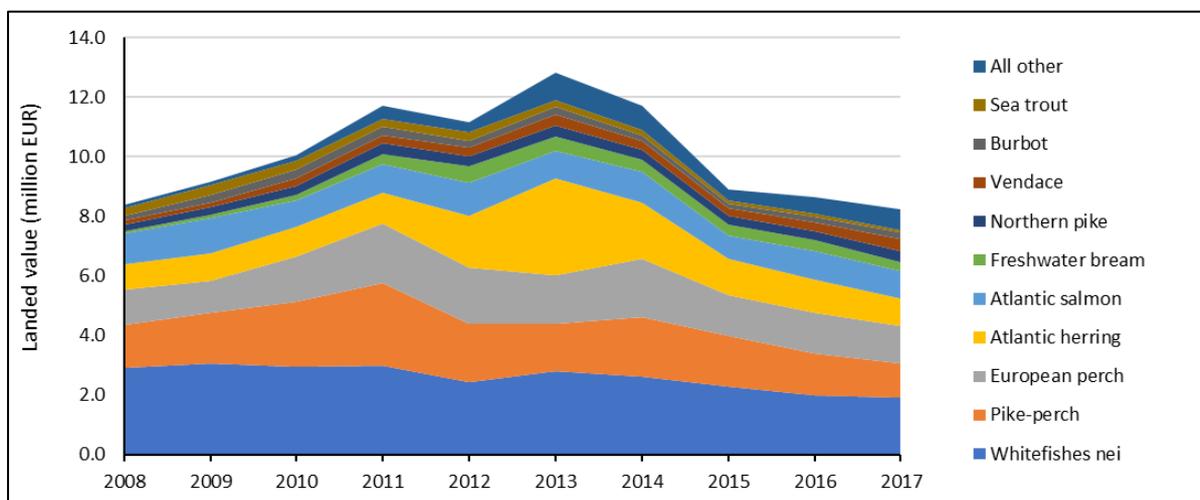
**Finish SSCF vessels and employment**

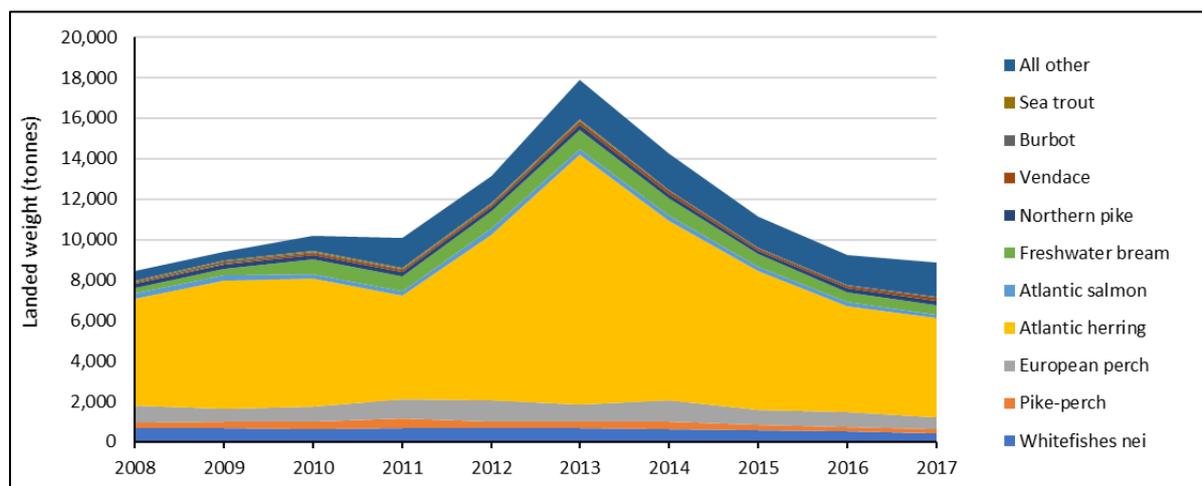


Source: Authors' calculations based on STECF, 2019.

The main SSCF fisheries by value are whitefishes, pike-perch, European perch, herring, and salmon. By weight, herring represents over 55% of landings.

**Finish SSCF landings by value and quantity**

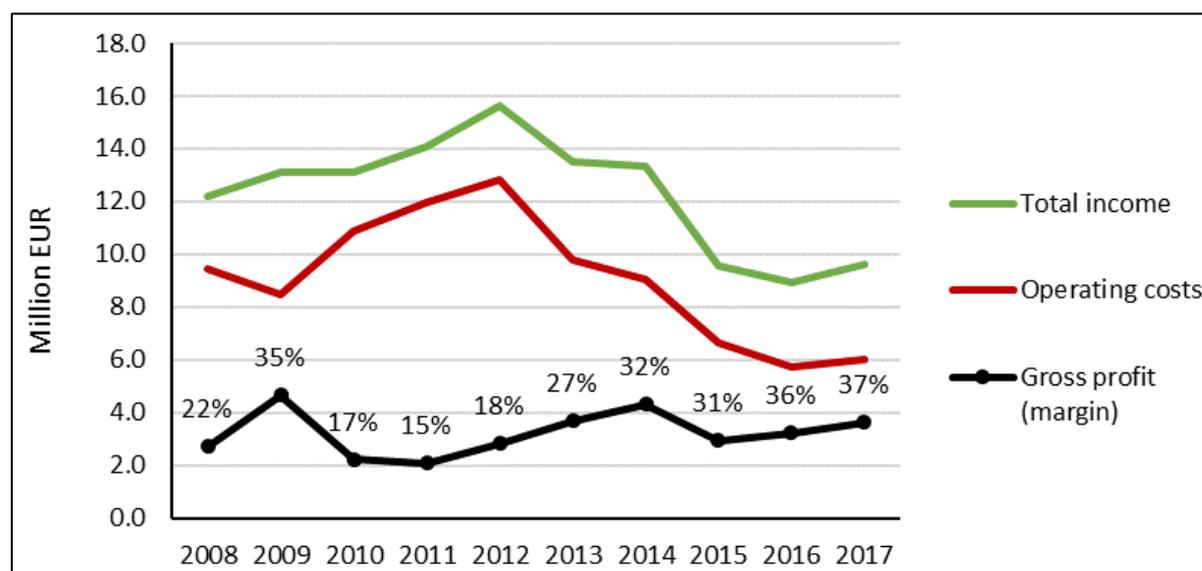




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Finish SSCF has fluctuated significantly over the past decade. Furthermore, while the trend for income is downwards, so are operating costs, leading to an upward trend in gross profits and gross profit margin.

#### Finish SSCF economic performance

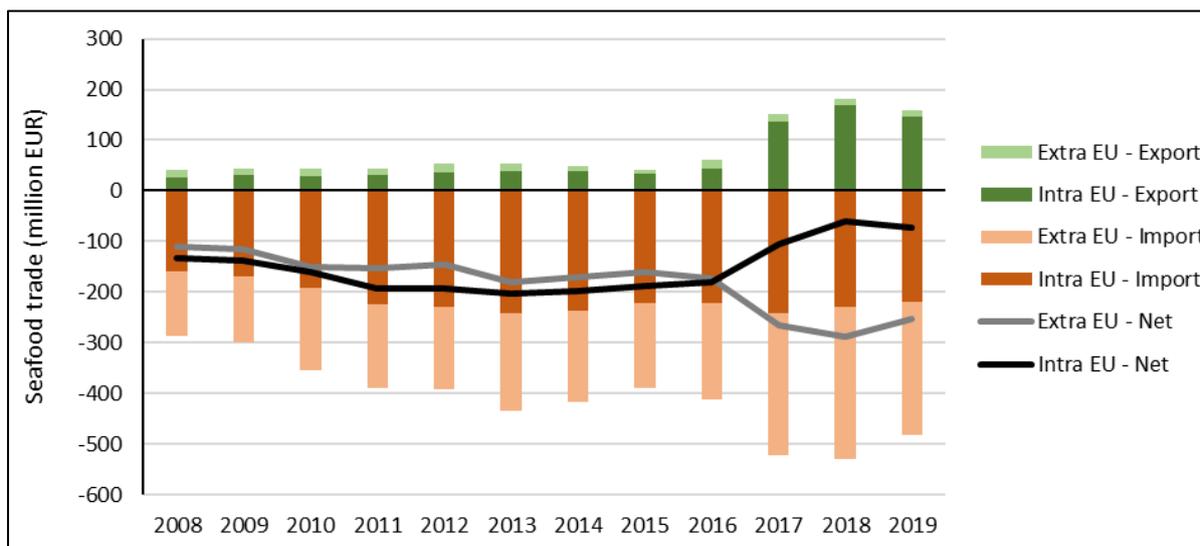


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The most important driver affecting the economic performance of the Finish SSCF is the state of fish stocks and the subsequent management measures (in particular the limits on total allowable catch) that are put in place. While issues in the Russian market for herring have led to price declines, the prices for other important species to the Finish SSCF like European perch, pike-perch and whitefish have been increasing in recent years due to declining supply. National fisheries experts do not identify seafood imports as a significant issue for the Finish fishing fleet (STECF, 2019).

Finland has been a consistent net importer of seafood at the intra-EU and extra-EU level over the past decade, although in recent years there is an emerging trend of increased intra-EU exports and decreased extra-EU imports.

**Finland intra and extra EU seafood trade**



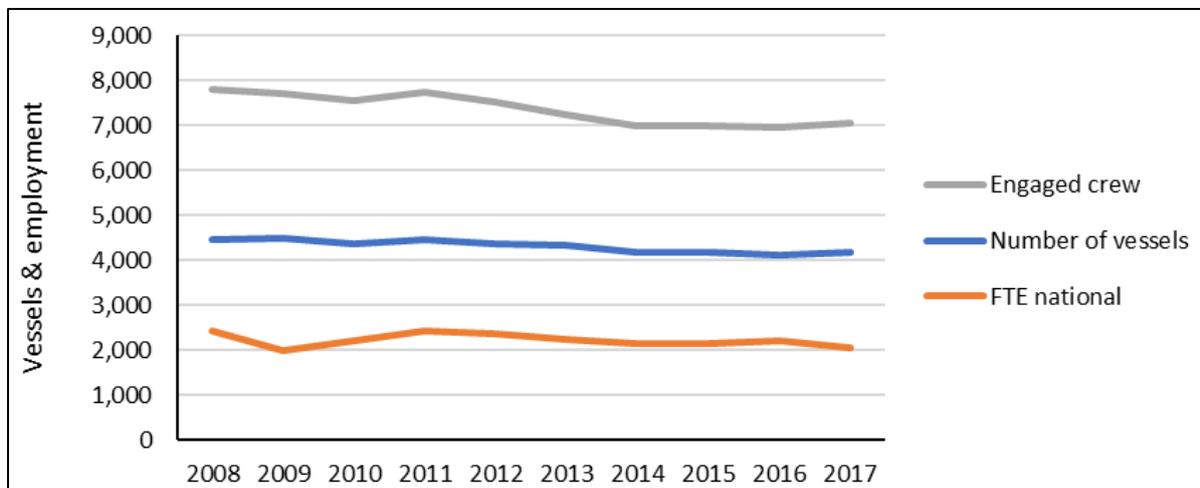
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are salmon (Norway), tuna (Mauritius, Thailand), and shrimp (Norway) (Eumofa, 2020a).

## France

In 2017, the French SSCF consisted of 4,194 vessels employing 7,068 fishers (2,061 full-time equivalents). Both employment and capacity have slightly declined over the past decade.

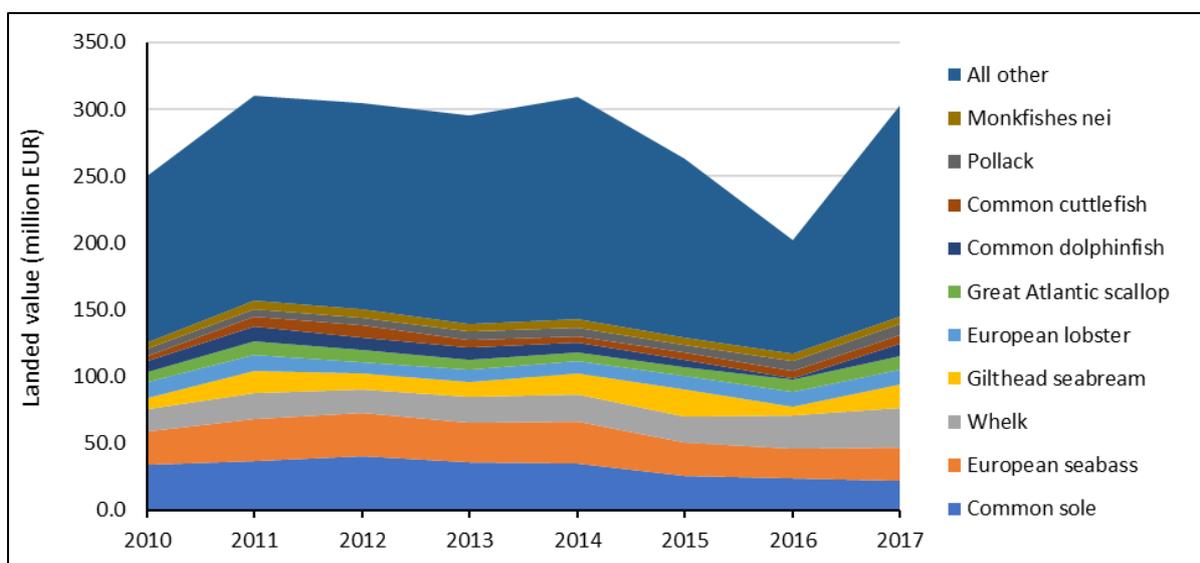
**French SSCF vessels and employment**

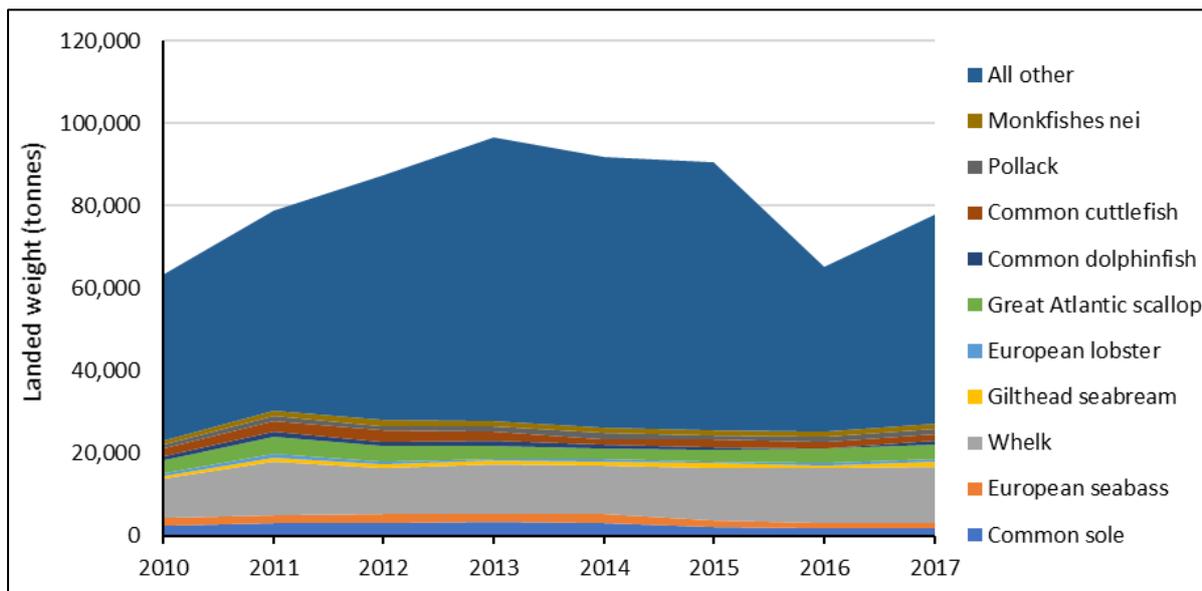


Source: Authors' calculations based on STECF, 2019.

The French SSCF is extremely diverse in terms of species targeted and gear types used. The main species by value are sole, seabass, whelk, seabream, lobster, and scallops.

**French SSCF landings by value and quantity**

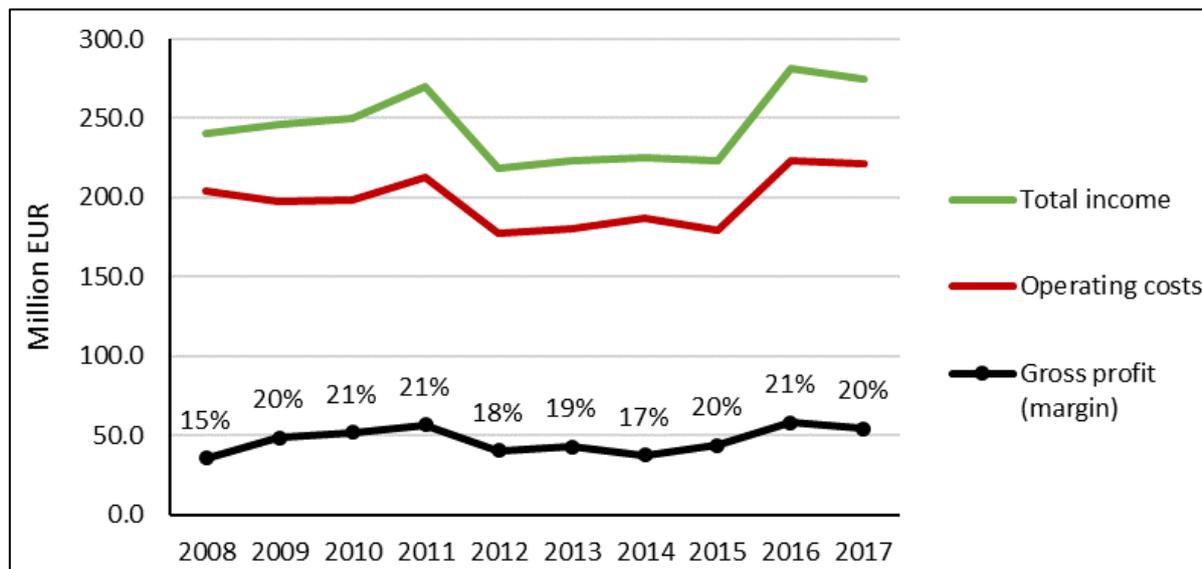




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the French SSCF is fairly stable, with earnings around EUR 250 million annually and fairly positive, with gross profits around EUR 50 million annually for a gross profit margin of 20%.

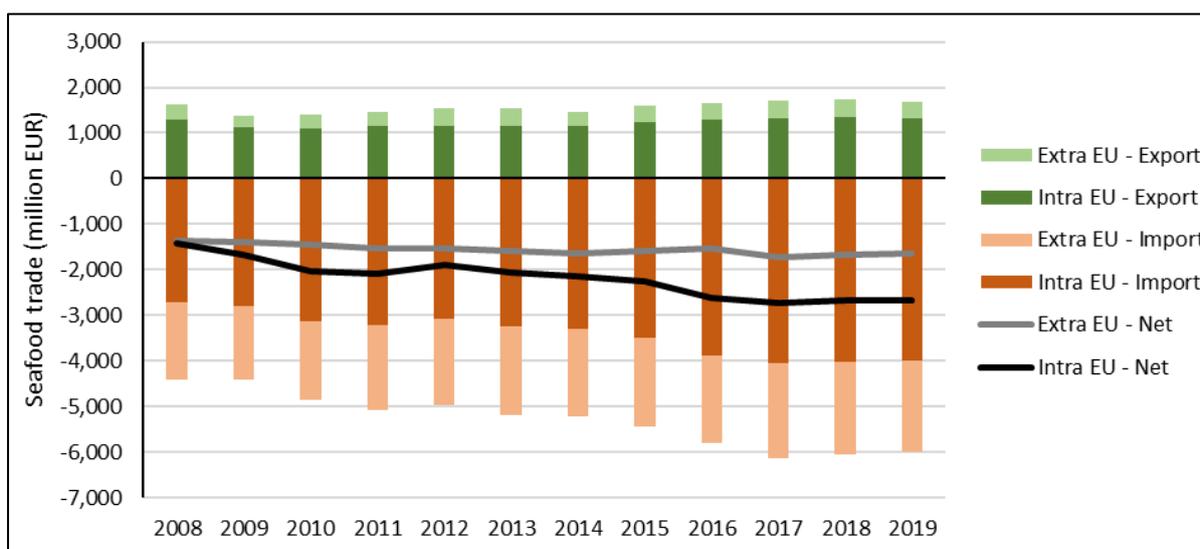
**French SSCF economic performance**



Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Just as the French SSCF is characterised by diverse species and fishing gear, so too are the main drivers of economic performance. For example, while auctions are used for a significant amount of fish sale, direct sale is used for scallops and crustaceans and whelks are often sold off-auction. Other drivers of economic performance include access to coastal waters, quotas and fishing rights, the landing obligation, and difficulties renewing vessels and recruiting new fishers. National fisheries experts do not identify seafood imports as a significant issue for the French fishing fleet (STECF, 2019). France is a consistent net importer of seafood at the intra-EU and extra-EU level over the past decade, with both trends increasing further.

**French intra and extra EU seafood trade**



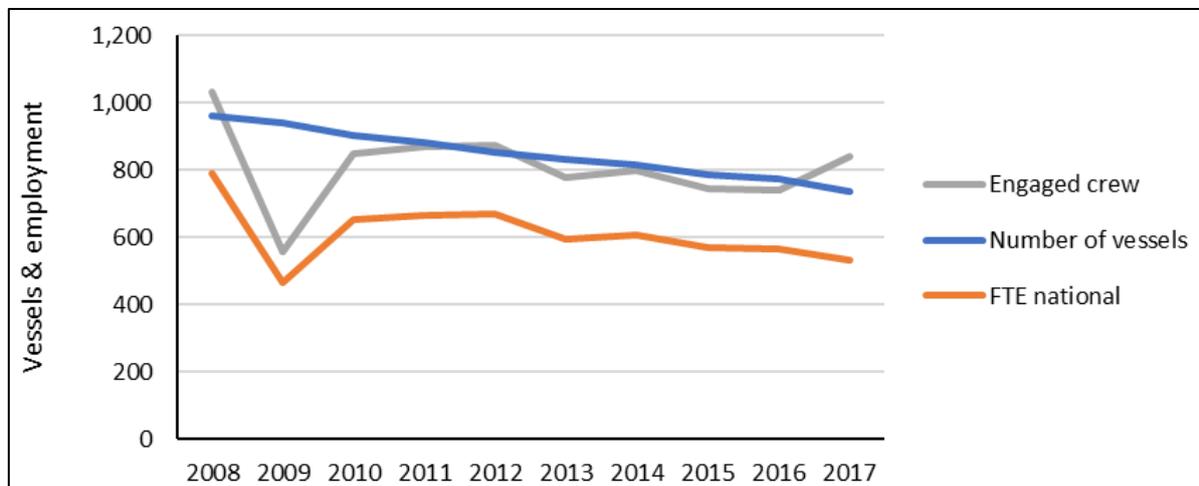
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are shrimp (Ecuador), tuna (Seychelles, Ecuador), salmon (United States, Chile, China), scallops (Argentina, United States), and Alaska pollock (China, United States) (Eumofa, 2020a).

## Germany

In 2017, the German SSCF consisted of 763 vessels employing 839 fishers (534 full-time equivalents). Both employment and capacity have slightly declined over the past decade.

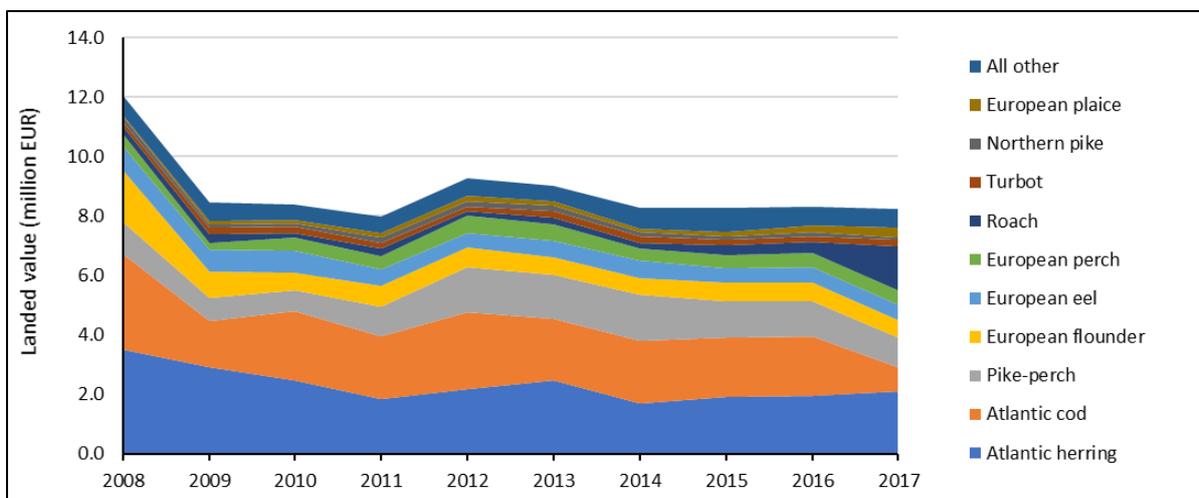
**German SSCF vessels and employment**

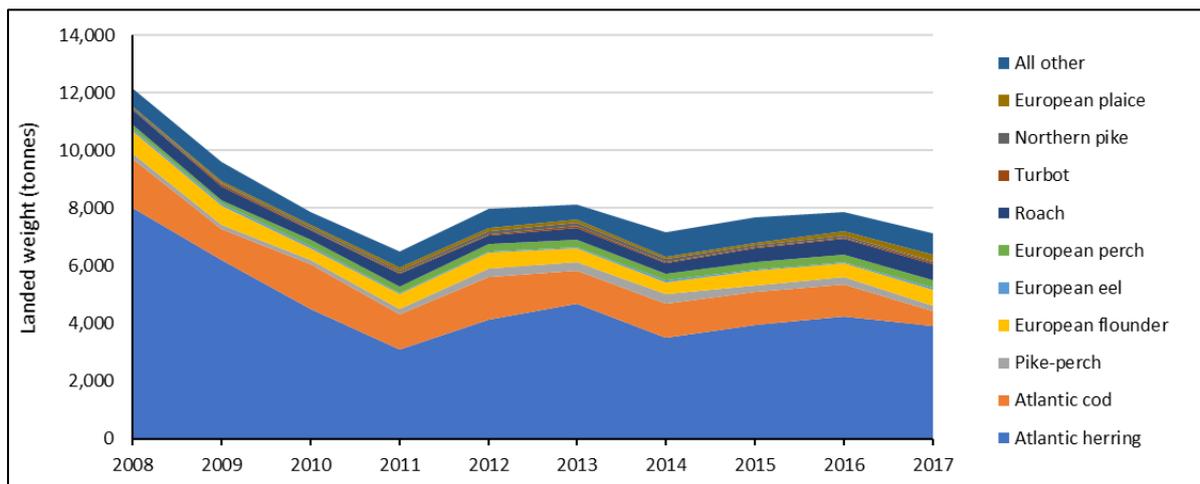


Source: Authors' calculations based on STECF, 2019.

The main SSCF fisheries by value are herring, cod, pike-perch, eel, and recently roach. By weight, herring represents 55% of landings. Almost all the German SSCF operates in the Baltic Sea.

**German SSCF landings by value and quantity**

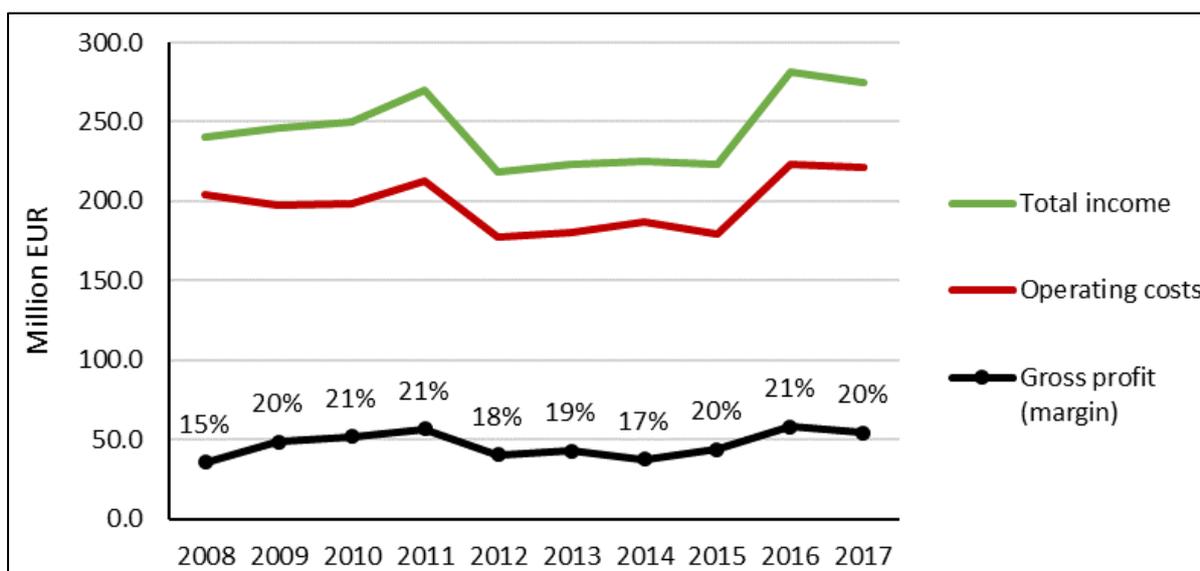




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the German SSCF is highly variable, with the fleet dipping to unprofitable levels in multiple years over the past decade.

**German SSCF economic performance**

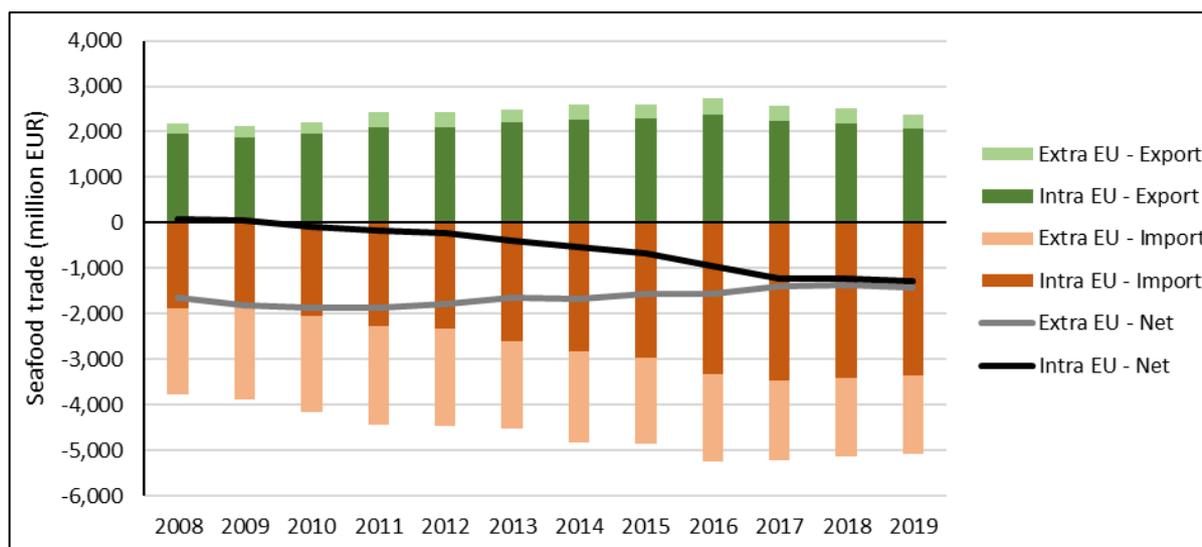


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The poor ecological status of cod and herring in the Western Baltic Sea has had a detrimental effect on the economic performance of the SSCF. Total allowable catches have been significantly cut and new management measures put in place that severely limit fishing opportunities for these fisheries. National fisheries experts do not identify seafood imports as a significant issue for the German fishing fleet (STECF, 2019).

Germany is a consistent net importer of seafood at the extra-EU level and in recent years has become a net importer of seafood at the intra-EU level as well.

**German intra and extra EU seafood trade**



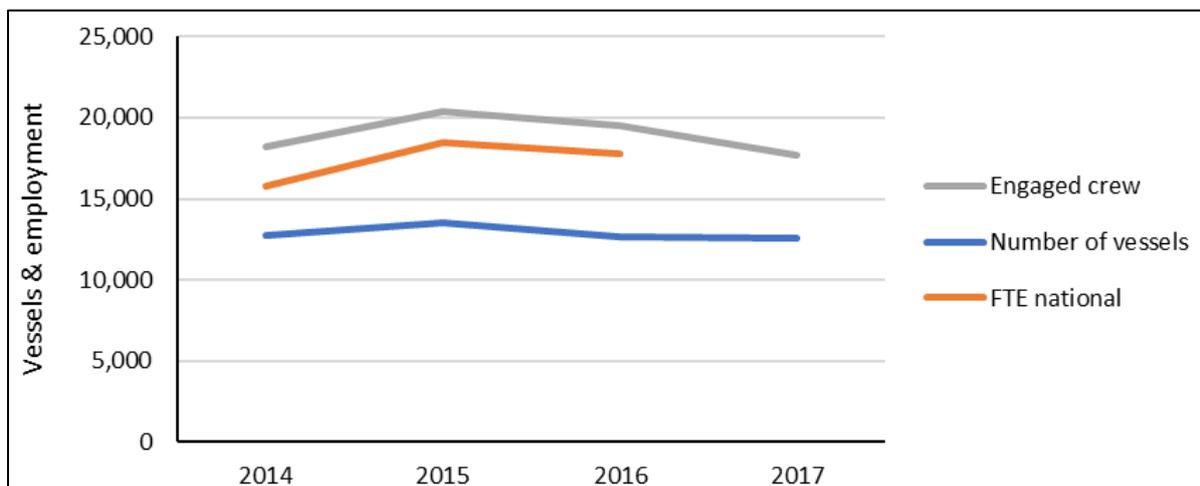
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are salmon (Norway, China, United States), Alaska pollack (China, United States), tuna (Philippines, Ecuador), cod (China, Norway), and shrimp (Viet Nam, Bangladesh) (Eumofa, 2020a).

## Greece

In 2017, the Greek SSCF consisted of 12,538 vessels employing 17,654 fishers (17,748 full-time equivalents in 2016), making it the largest SSCF of any EU Member State. Data reporting issues prevent any conclusions on the directional trend.

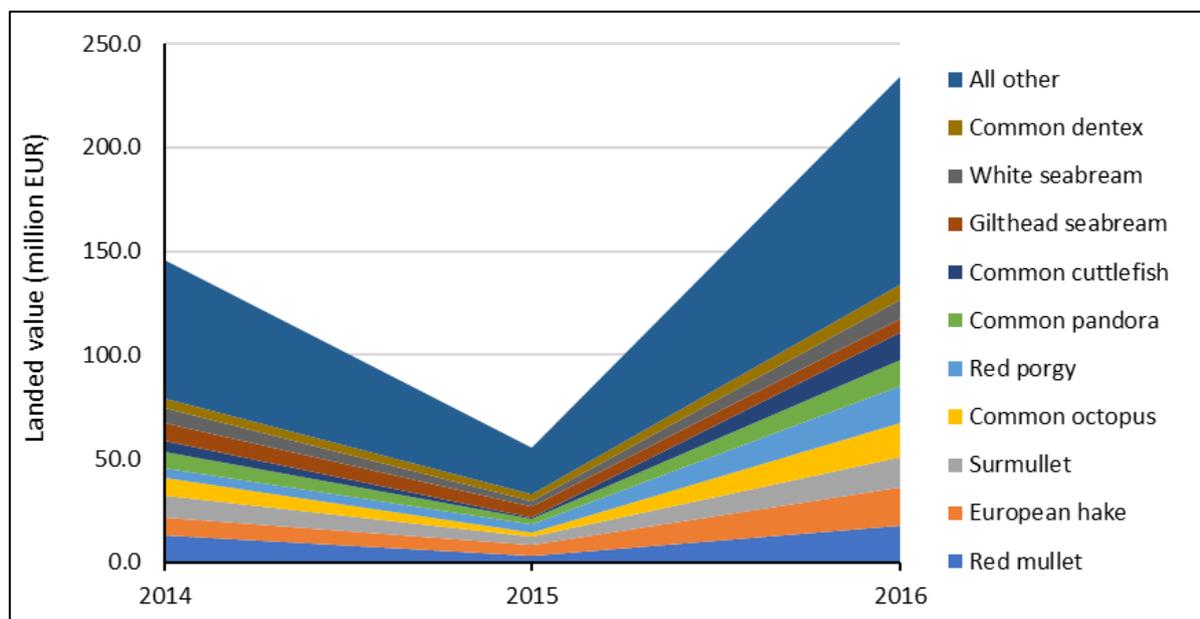
**Greek SSCF vessels and employment**

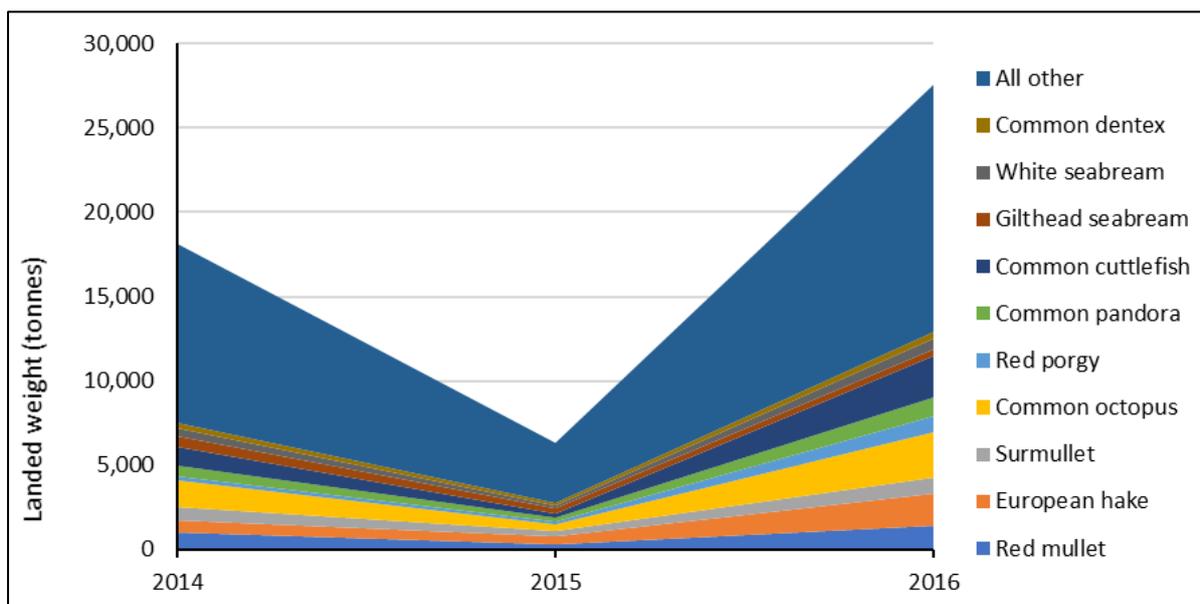


Source: Authors' calculations based on STECF, 2019.

The main SSCF fisheries by value and tonnage are red mullet, hake, surmullet, octopus, and red porgy. The SSCF fish around the Greek coastline using polyvalent passive gears (nets, longlines, pots, traps).

**Greek SSCF landings by value and quantity**

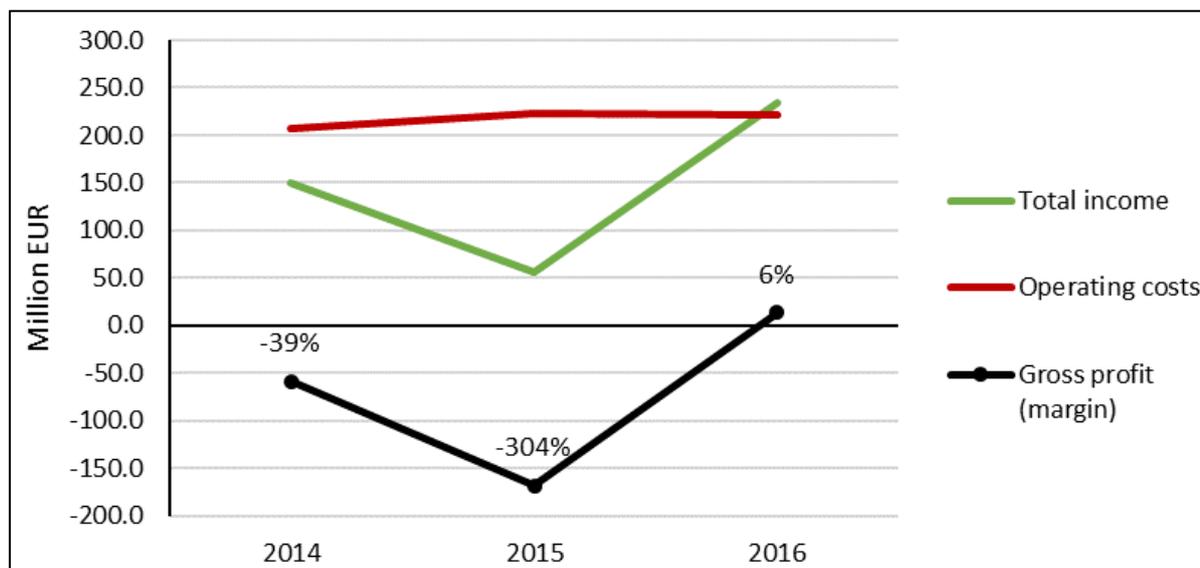




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Like the fleet capacity data, there are significant economic data reporting issues with the Greek SSCF. The most recent year (2016) suggests small profits for the fleet on earnings over EUR 200 million.

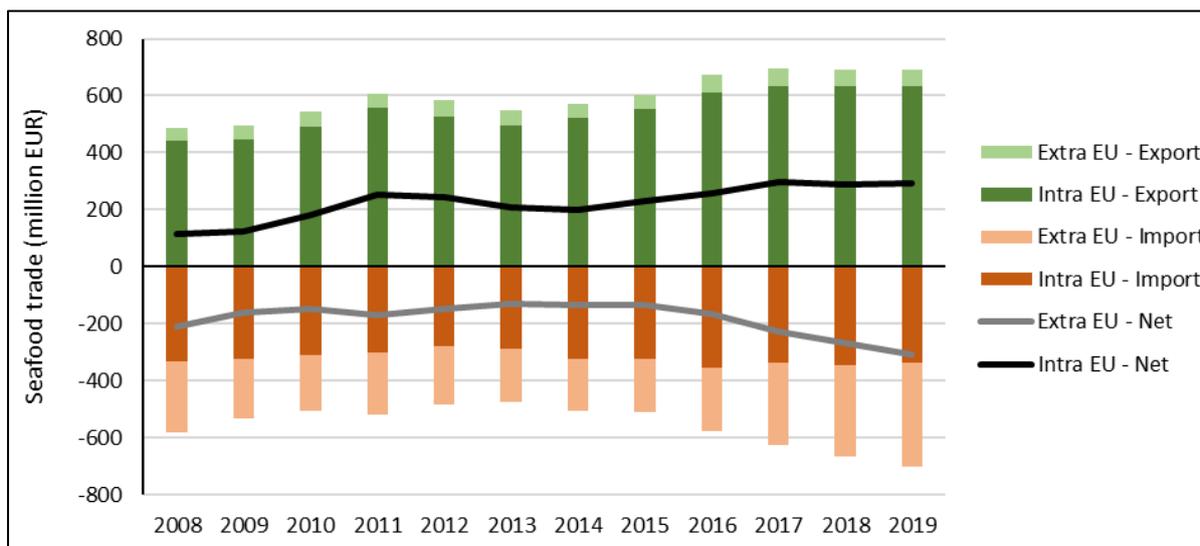
**Greek SSCF economic performance**



Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The Greek SSCF is one of the largest in the EU and is also an economically important sector within Greece. In Greece, fish sales are split almost evenly between wholesalers and fish auctions (50%) and direct sale to consumers (45%) with more wholesale from the large-scale fleet and more direct sale from the SSCF. The poor ecological state of many fish stocks in the Mediterranean Sea is one of the main factors driving fleet economic performance. National fisheries experts do not identify seafood imports as a significant issue for the Greek fishing fleet, although there is competition in terms of the actual catching with non-EU countries (e.g. Turkey) (STECF, 2019). Greece is a consistent net exporter of seafood at the intra-EU level and a net importer of seafood at the extra-EU level. Taken together, and measured by value, these trade patterns roughly balance.

**Greek intra and extra EU seafood trade**



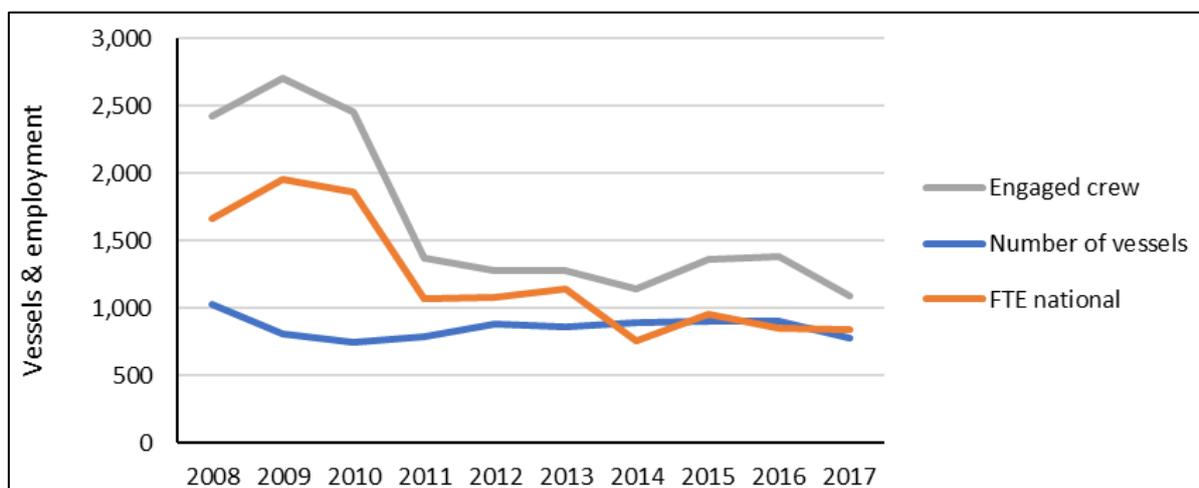
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are squid (India, New Zealand, South Africa), salmon (Norway), octopus (Morocco, Mauritius, Indonesia), fish oil (Norway), and warmwater shrimp (Ecuador, India) (Eumofa, 2020a).

## Ireland

In 2017, the Irish SSCF consisted of 783 vessels employing 1,097 fishers (844 full-time equivalents). Due to fleet classification issues these measures have been fluctuating dramatically, although FTE employment, which is based on activity, has been slowly declining in line with the overall EU trend.

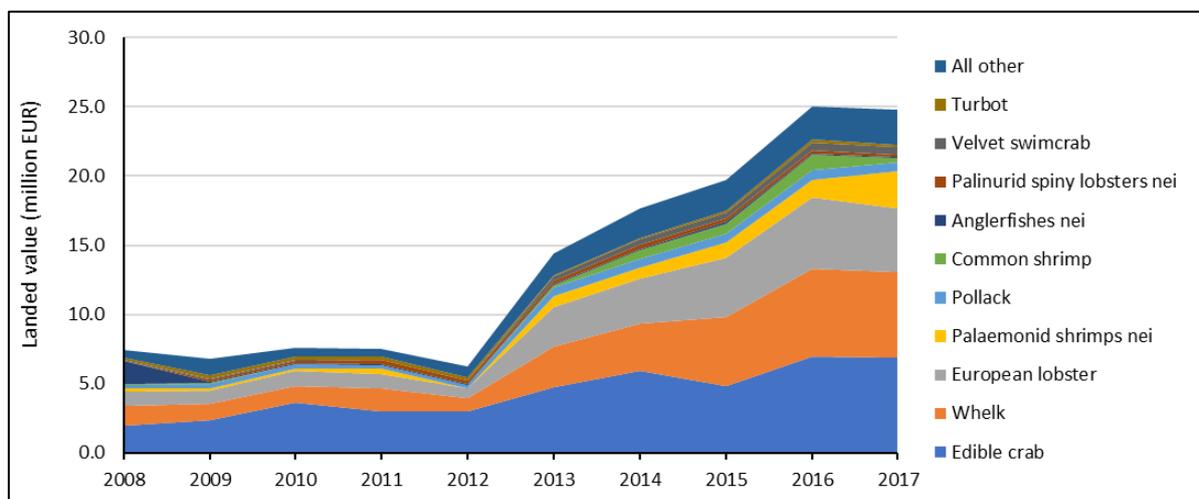
**Irish SSCF vessels and employment**

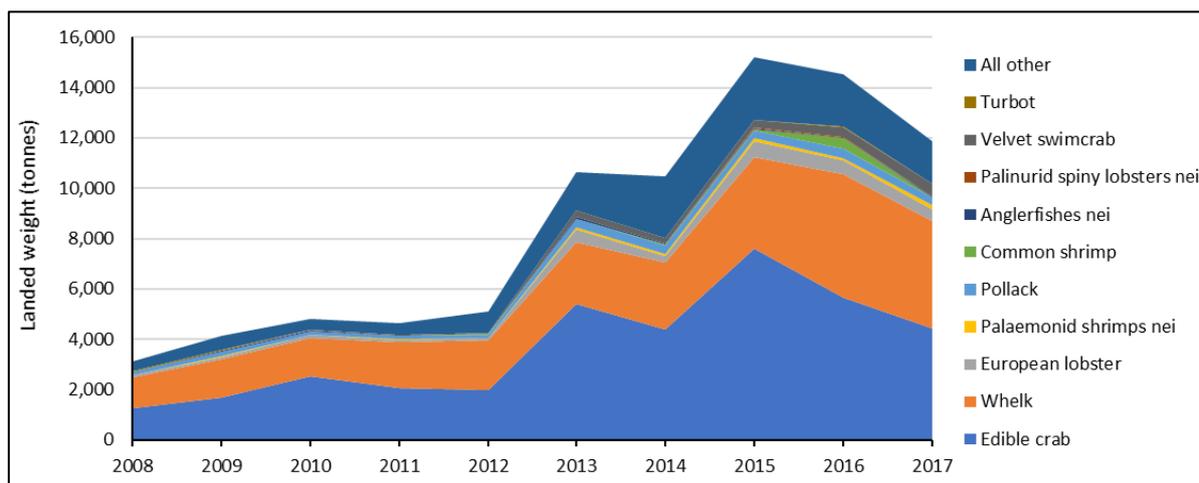


Source: Authors' calculations based on STECF, 2019.

The main Irish SSCF fisheries are all shellfish: crab, whelk, lobster, and shrimp. By weight crab and whelk constitute 73% of landings. The value of landings is trending strongly upward.

**Irish SSCF landings by value and quantity**

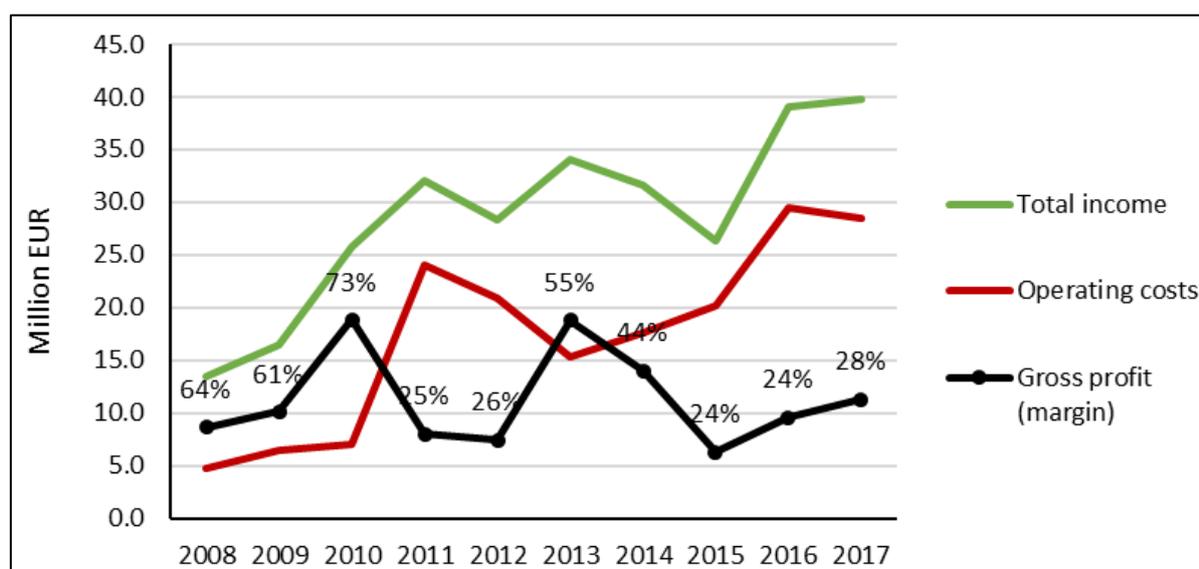




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Following from the upward trend in landed value, income is also increasing for the Irish SSCF, although an increase in operating costs means that profits remain at a similar, variable level.

#### Irish SSCF economic performance

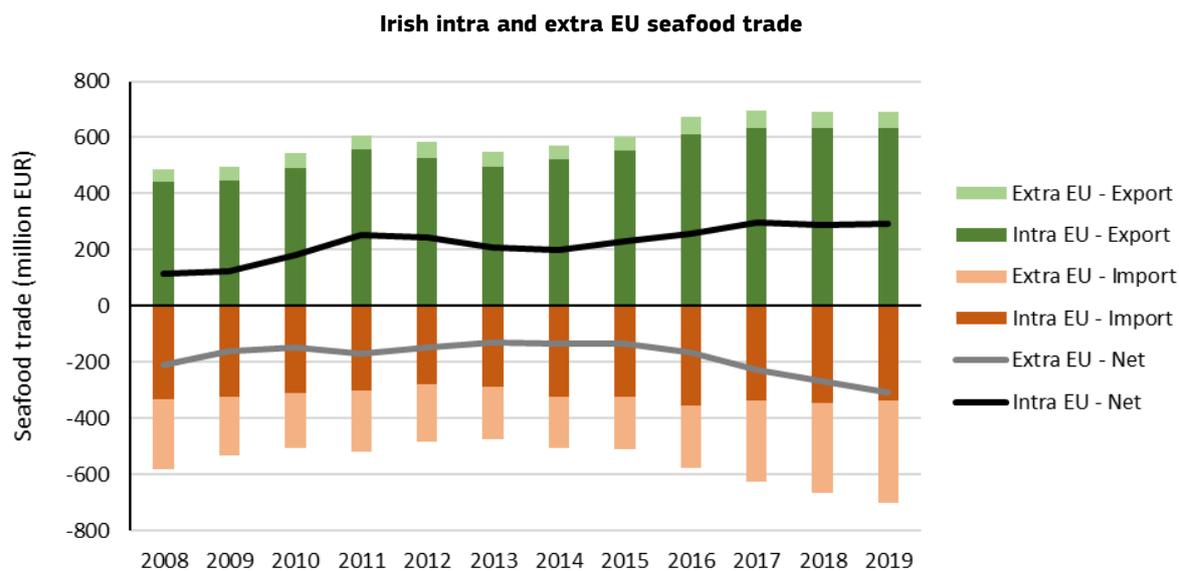


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Lower fuel costs, higher fish prices for some species, and a reduction in fleet capacity are credited with the general improvement in economic performance in recent years. National fisheries experts do not identify seafood imports as a significant issue for the Irish fishing fleet (STECF, 2019).

Despite the relatively small number of vessels in the Irish SSCF compared other Member States, it is highly important to many, often deprived, coastal communities. Data issues, particularly for the under 10m fleet may understate this importance.

Ireland is a consistent net exporter of seafood at both the intra-EU and extra-EU levels – in contrast to most EU Member States and the EU as whole. In 2019, the net export of seafood totalled EUR 161 million at the intra-EU level and EUR 127 million at the extra-EU level.



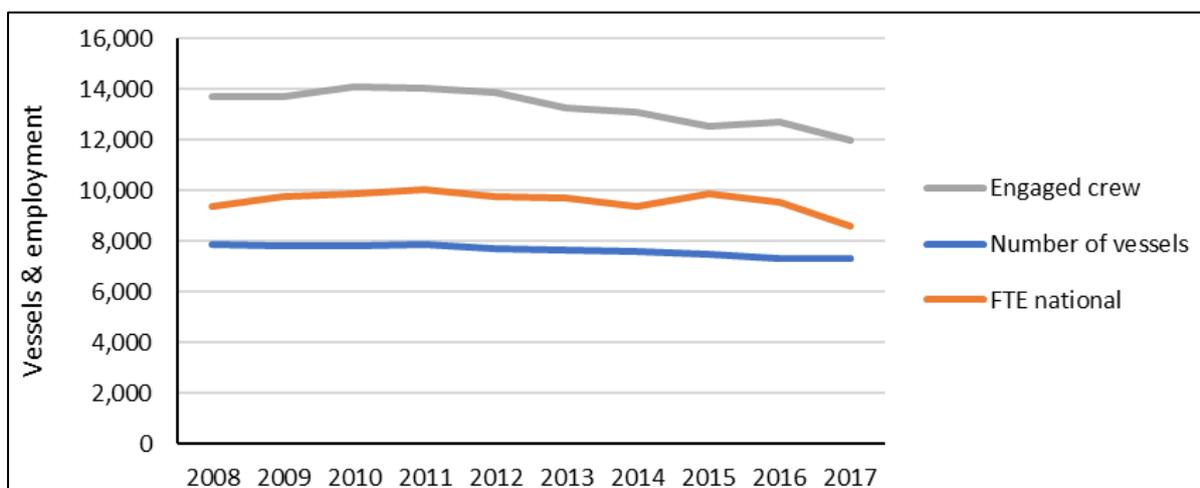
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are tuna (Maldives), cod (Iceland, Russia, and China), shrimp (India), and salmon (China, Chile) (Eumofa, 2020a).

## Italy

In 2017, the Italian SSCF consisted of 7,346 vessels employing 11,996 fishers (8,599 full-time equivalents), making it one of the second largest SSCF in the EU after Greece by vessels and employment. Both measures have been slightly decreasing over time, following the EU trend.

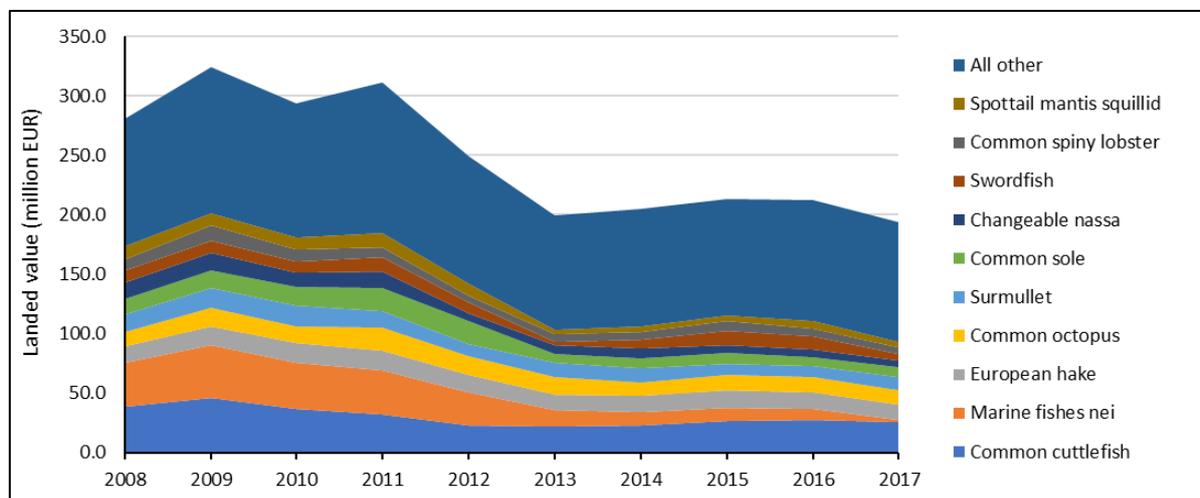
**Italian SSCF vessels and employment x**

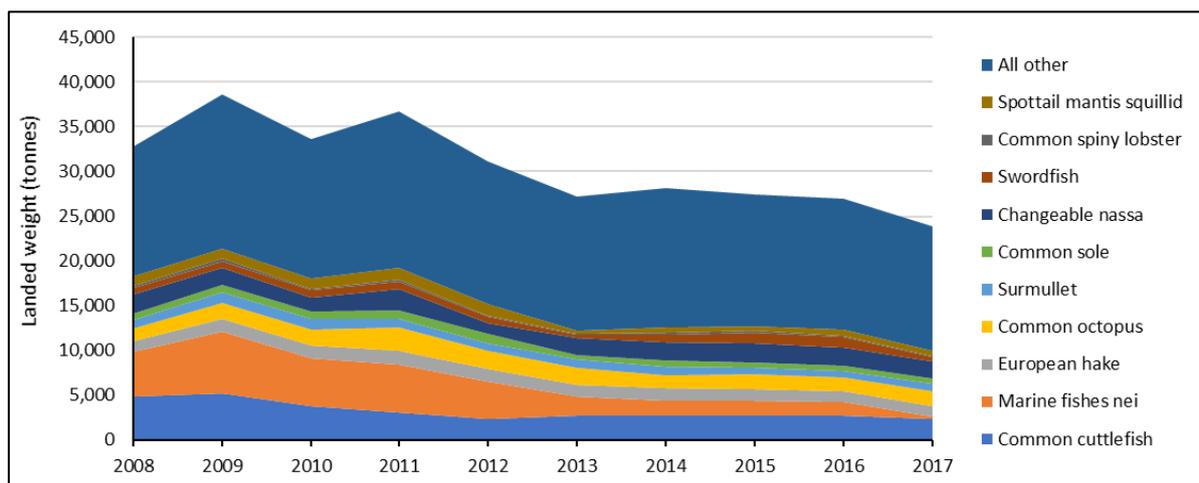


Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Cuttlefish is the largest Italian SSCF fishery by both value and quantity, followed by hake and octopus. The trend in landings is trending downwards by both value and quantity.

**Italian SSCF landings by value and quantity**

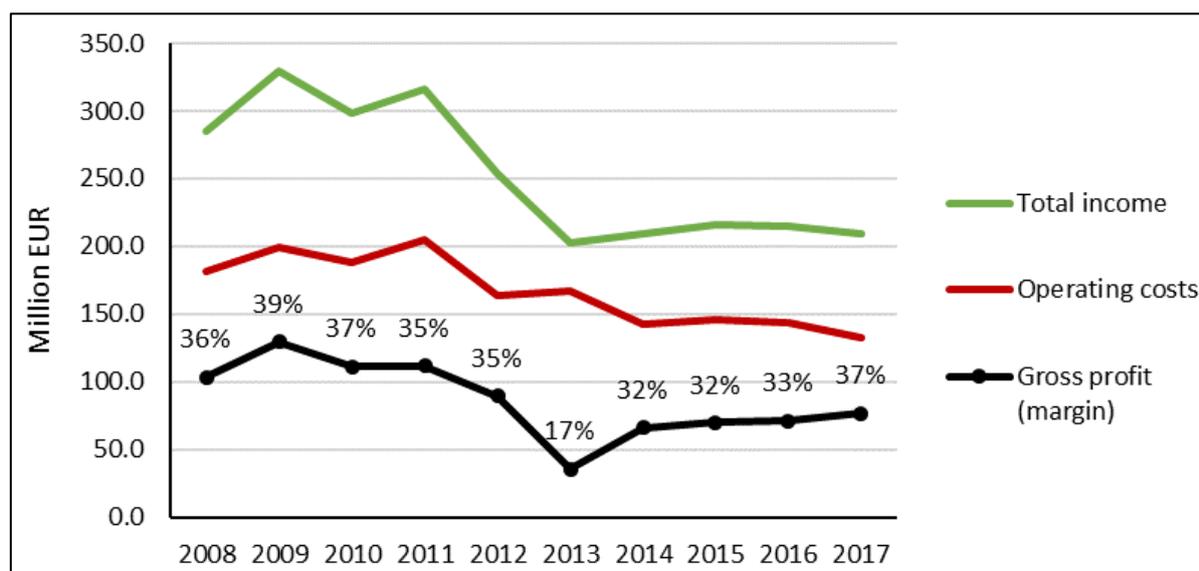




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Total income has stabilised in recent years – just above EUR 200 million – as has operating costs – just below EUR 150 million. The resulting gross profit margin above 30% is high compared to other Member States.

#### Italian SSCF economic performance

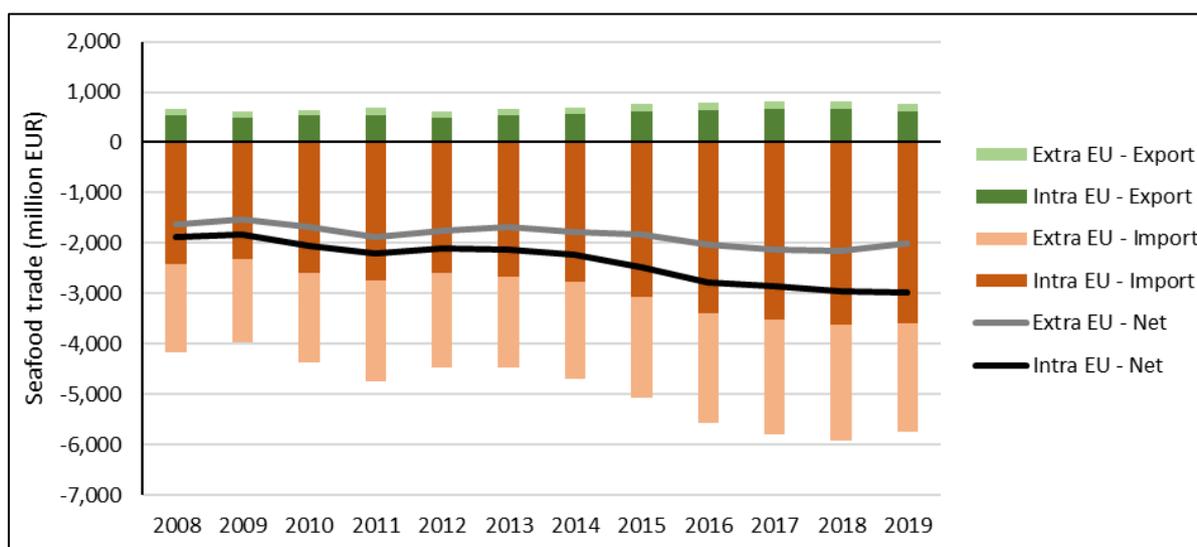


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The price setting power of wholesalers in Italy is credited as one of the main drivers of fleet economic performance in Italy, alongside the poor ecological condition of many fish stocks in the Mediterranean Sea, lower fuel prices, and strong consumer demand. National fisheries experts do not identify seafood imports as a significant issue for the Italian fishing fleet as imports are instead integrated to the large and growing consumer market for seafood in Italy (STECF, 2019).

Italy is a large and ever-growing net importer of seafood at both the intra-EU and extra-EU levels. In 2019, the net import of seafood totalled EUR 3.1 billion at the intra-EU level and EUR 2.1 billion at the extra-EU level.

**Italian intra and extra EU seafood trade**



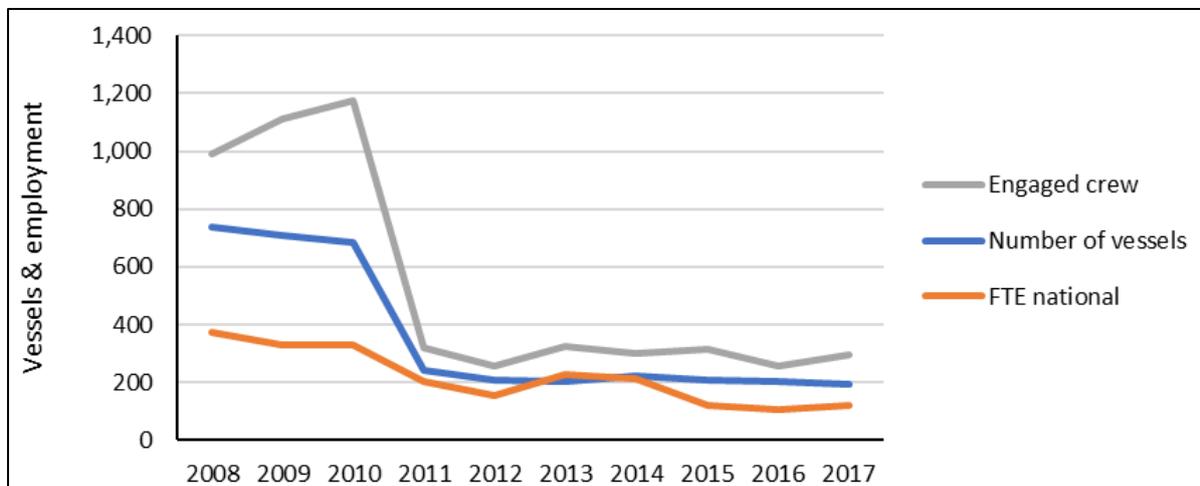
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are tuna (Ecuador, Mauritius, Seychelles, Philippines, Solomon Islands), squid (China, India, South Africa), octopus (Morocco), and shrimp (Ecuador, Argentina) (Eumofa, 2020a).

## Latvia

In 2017, the Latvian SSCF consisted of 196 vessels employing 298 fishers (120 full-time equivalents). Both employment and capacity are stable (following a change in 2011).

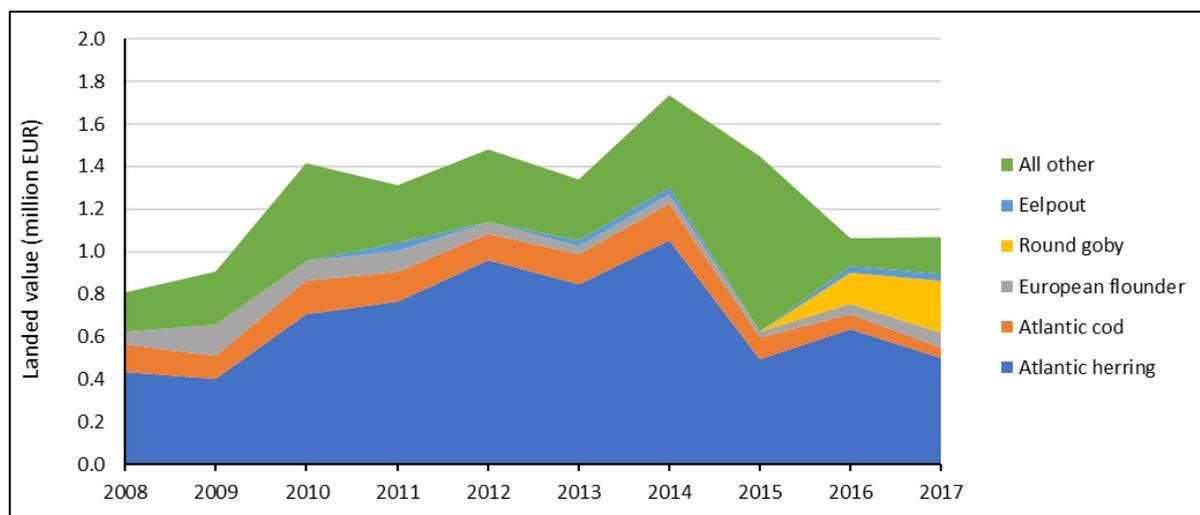
**Latvian SSCF vessels and employment**

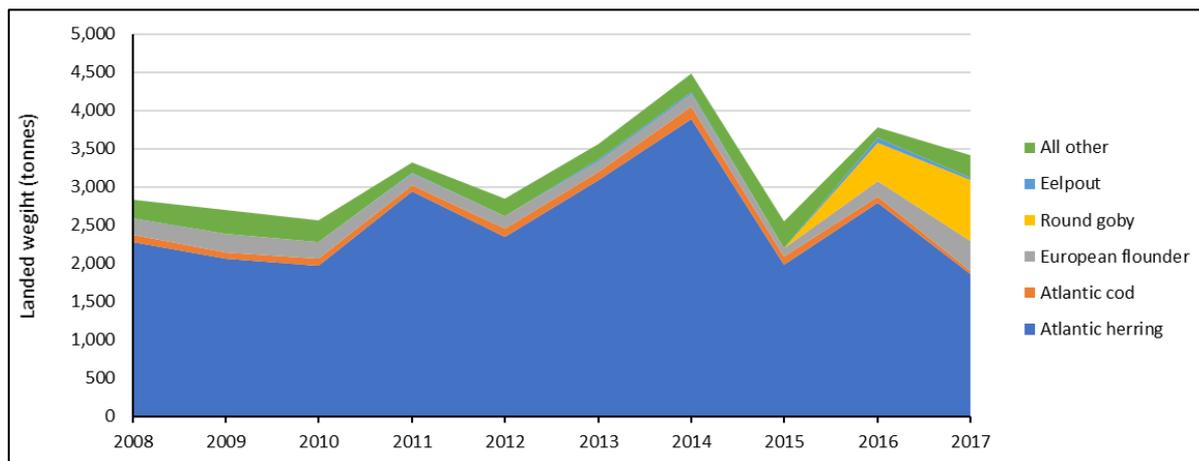


Source: Authors' calculations based on STECF, 2019.

The Latvian SSCF is oriented around a relatively small number of species with herring constituting just under half of the landed value and just over half of the landed weight. Round goby is a new and increasing SSCF fishery.

**Latvian SSCF landings by value and quantity -**

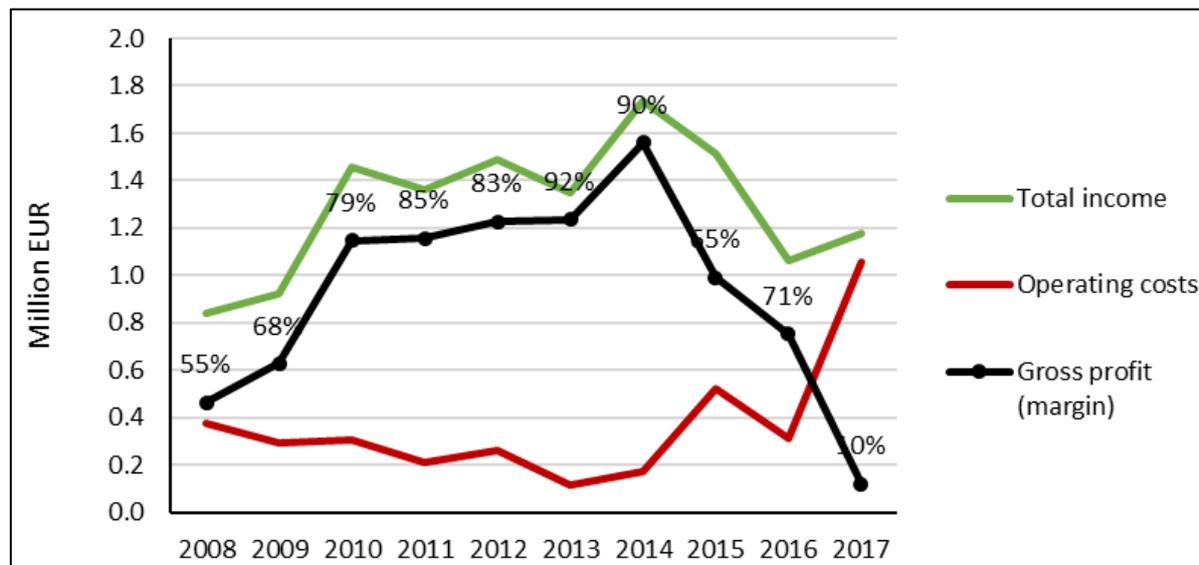




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

There are significant economic data reporting issues with the Latvian SSCF. The most recent year (2017) suggests small profits for the fleet on earnings just over EUR 1.2 million.

**Latvian SSCF economic performance**

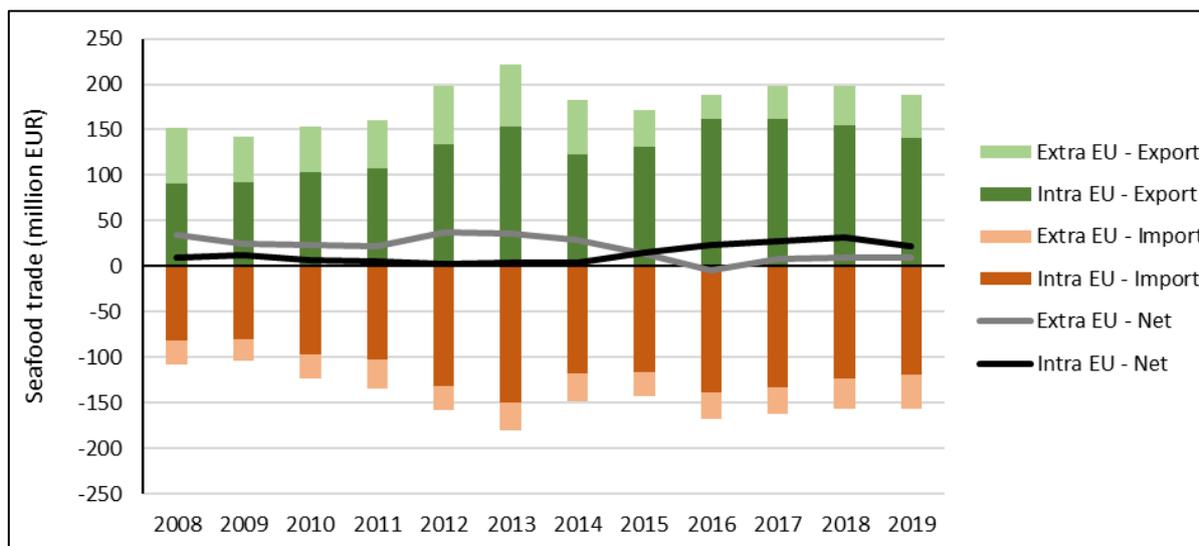


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The Latvian SSCF is highly seasonal due to cold winters but is nonetheless seen as economically important for coastal regions of the country. As Latvia is a relatively small place in fish markets, fish prices are largely dictated externally. The most important buyers of fresh fish are fish processing enterprises in Latvia and neighbouring countries. National fisheries experts do not identify seafood imports as a significant issue for the Latvian fishing fleet (STECF, 2019).

Imports and exports of seafood in Latvia are roughly balanced (by value) at both the intra-EU and extra-EU level.

**Latvian intra and extra EU seafood trade**



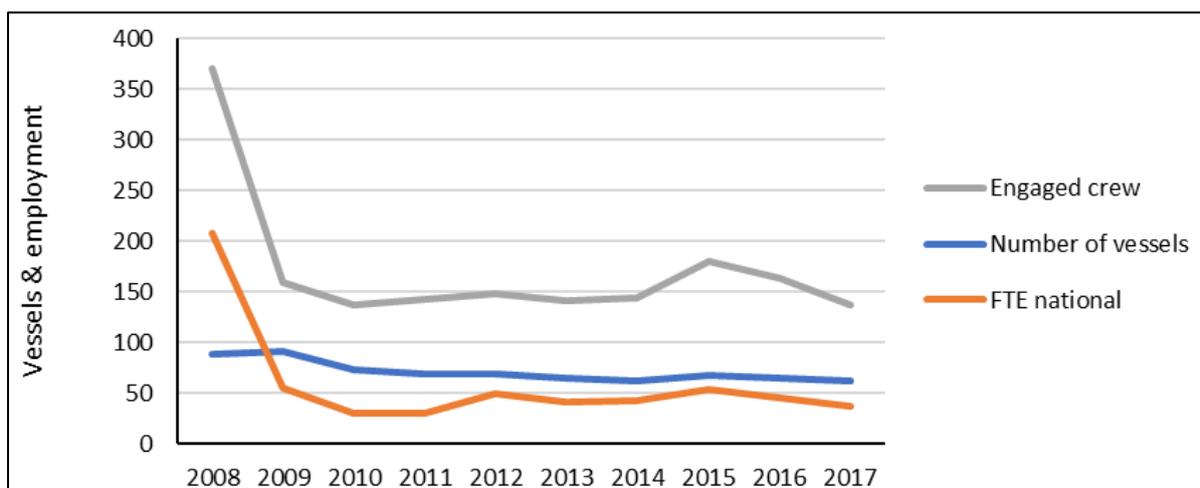
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are salmon, cod, mackerel, and herring – all predominantly imported from Norway – and tuna from Thailand (Eumofa, 2020a).

## Lithuania

In 2017, the Lithuanian SSCF consisted of 62 vessels employing 137 fishers (38 full-time equivalents) making it one of the smallest SSCF in any Member State. Both employment and capacity are stable (following a change to fleet classification).

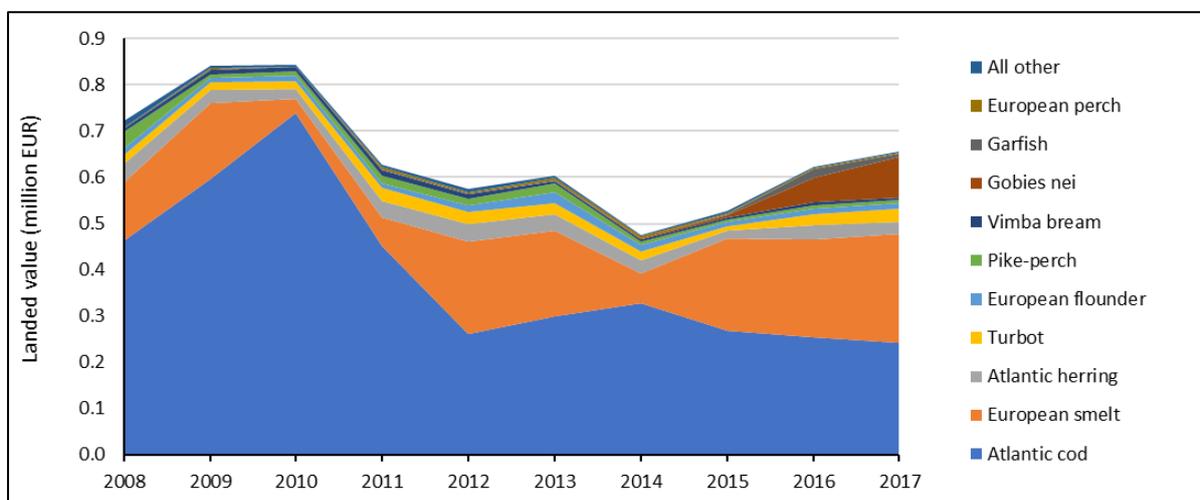
**Lithuanian SSCF vessels and employment -**

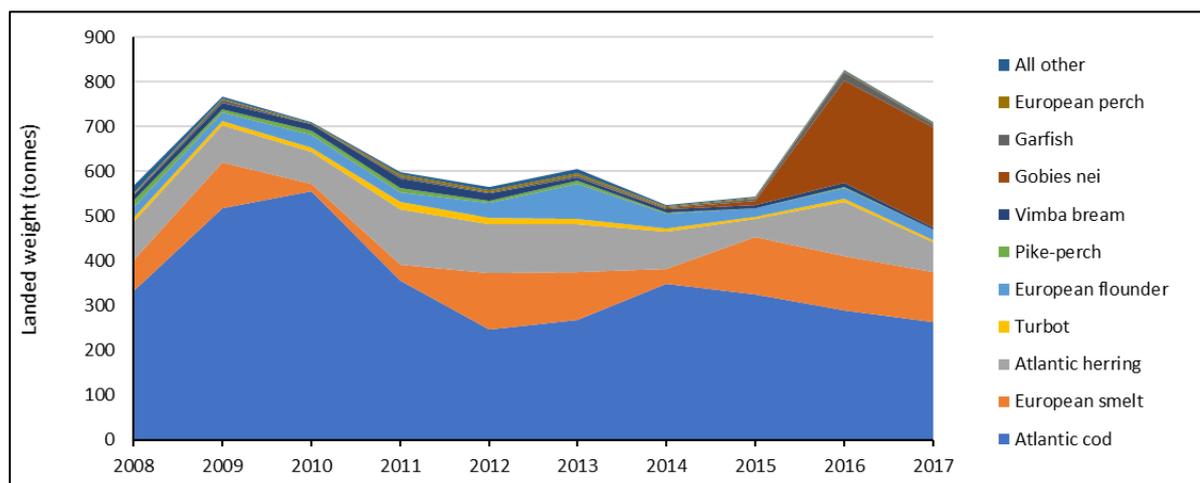


Source: Authors' calculations based on STECF, 2019.

The Lithuanian SSCF is oriented around a relatively small number of species with cod and herring representing 73% of landed value and 53% of landed weight. Goby is a new and increasing SSCF fishery.

**Lithuanian SSCF landings by value and quantity -**

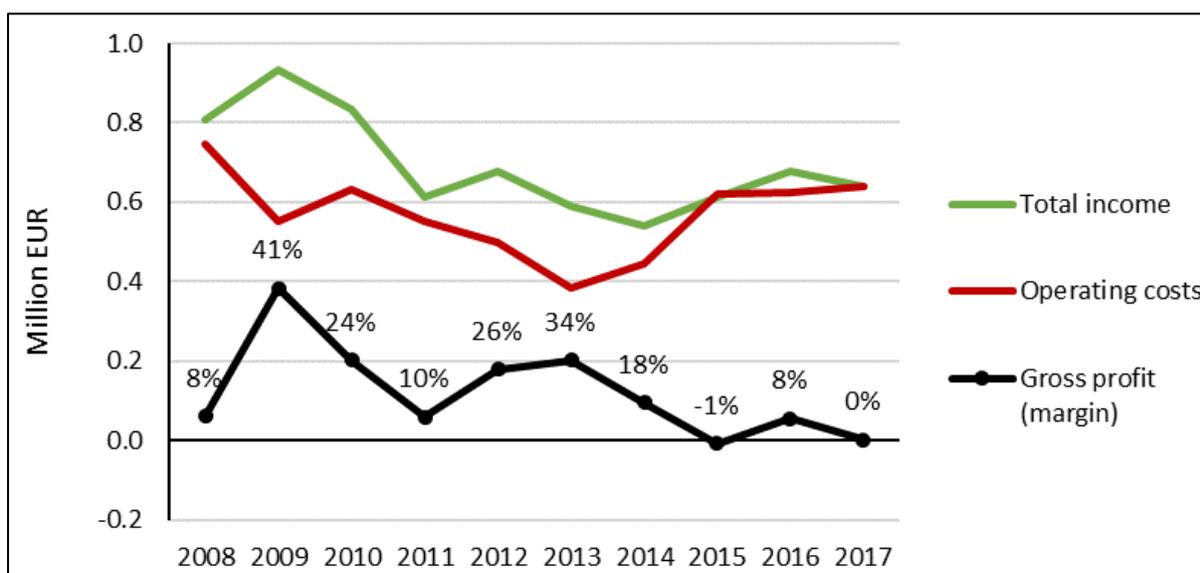




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Lithuanian SSCF fluctuates significantly with gross profit margins as high as 41% (in 2009) and as low as -1% (in 2015). In recent years operating costs have trended upwards while income has remained stable, causing profits and profitability to fall.

#### Lithuanian SSCF economic performance

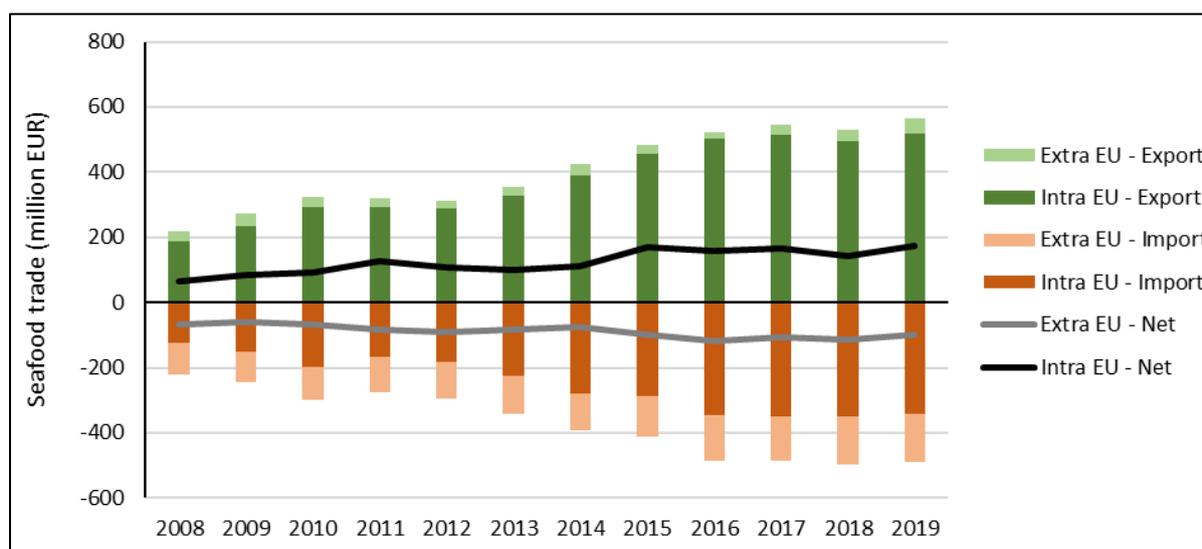


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

SSCF landings, particularly demersal species, are sold to local markets for direct consumption with only insignificant amounts sold for processing. In recent years, the local market has been strong with relatively high prices. National fisheries experts do not identify seafood imports as a significant issue for the Lithuanian fishing fleet (STECF, 2019).

Lithuania is a consistent net exporter of seafood at the intra-EU level and a net importer of seafood at the extra-EU level. Note that the SSCF is a small portion of these totals in Lithuania.

**Lithuanian intra and extra EU seafood trade**



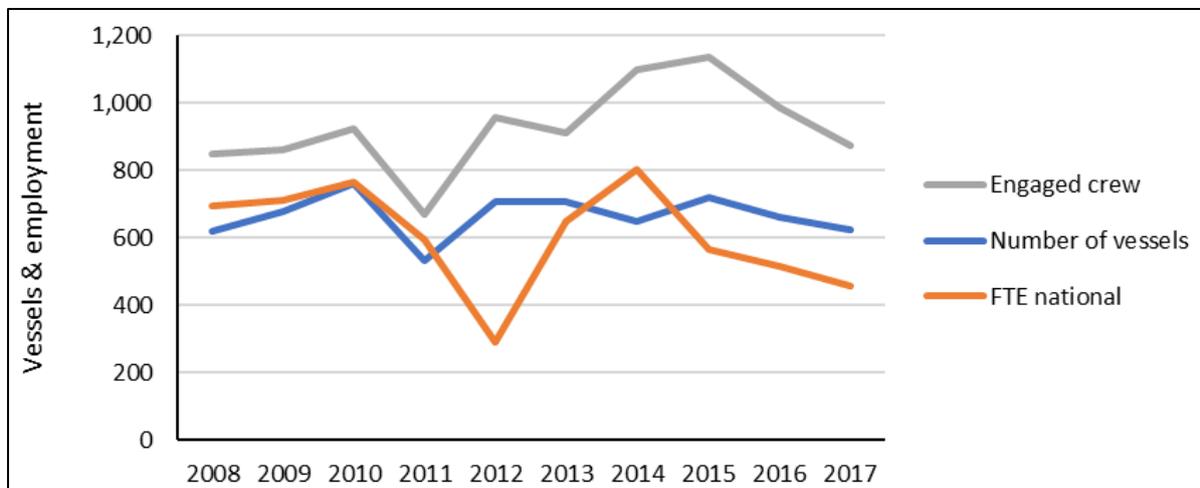
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are cod (Norway, Russia), surimi (United States), herring (Norway), and salmon (Norway, United States) (Eumofa, 2020a).

## Malta

In 2017, the Maltese SSCF consisted of 624 vessels employing 872 fishers (459 full-time equivalents). Both employment and capacity show variance but have trended downwards recently.

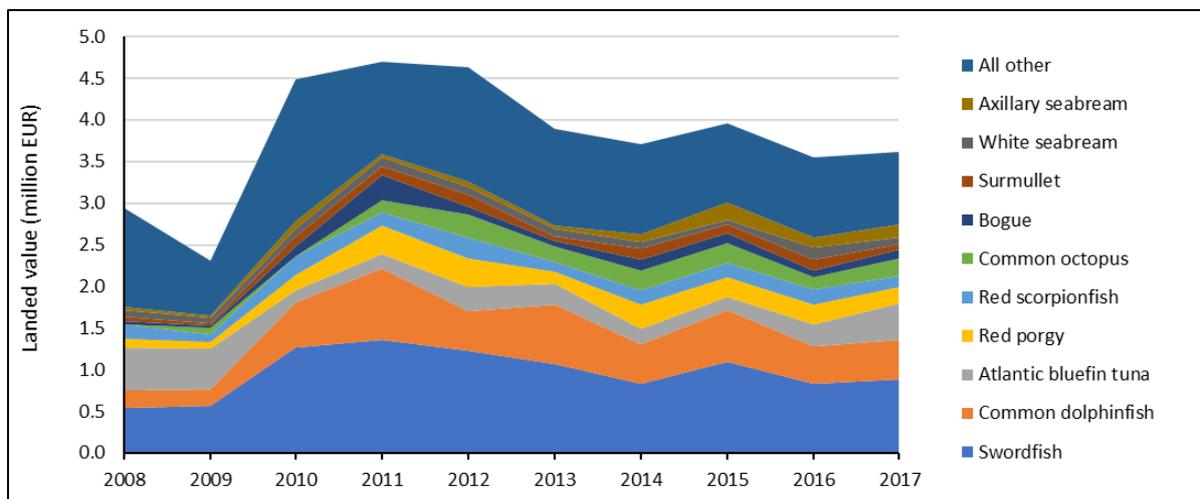
**Maltese SSCF vessels and employment**

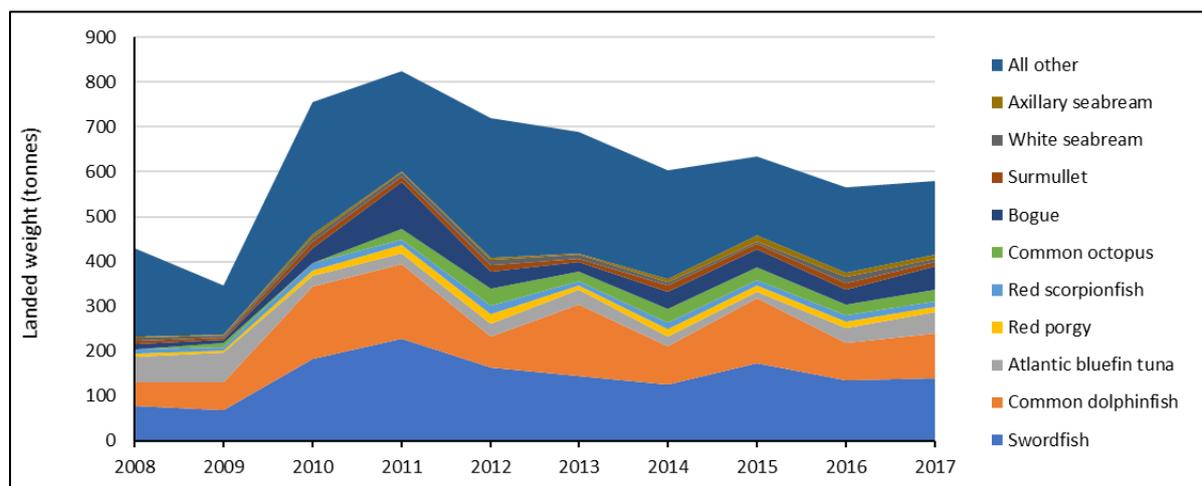


Source: Authors' calculations based on STECF, 2019.

Swordfish is the main SSCF fishery by both value and quantity, with other SSCF fisheries including dolphinfish, bluefin tuna, red porgy, red scorpionfish, and octopus.

**Maltese SSCF landings by value and quantity**

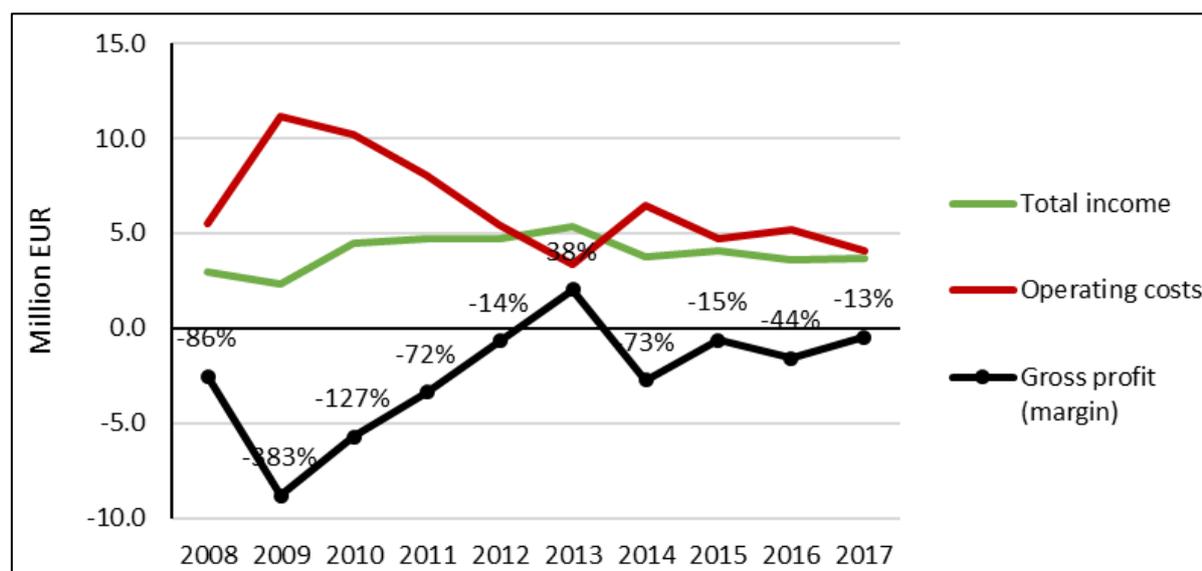




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Maltese SSCF is low but trending upwards. In the last decade there was only one year (2013) in which the fleet was operating profitability. Total income is relatively constant at EUR 4 million.

**Maltese SSCF economic performance**



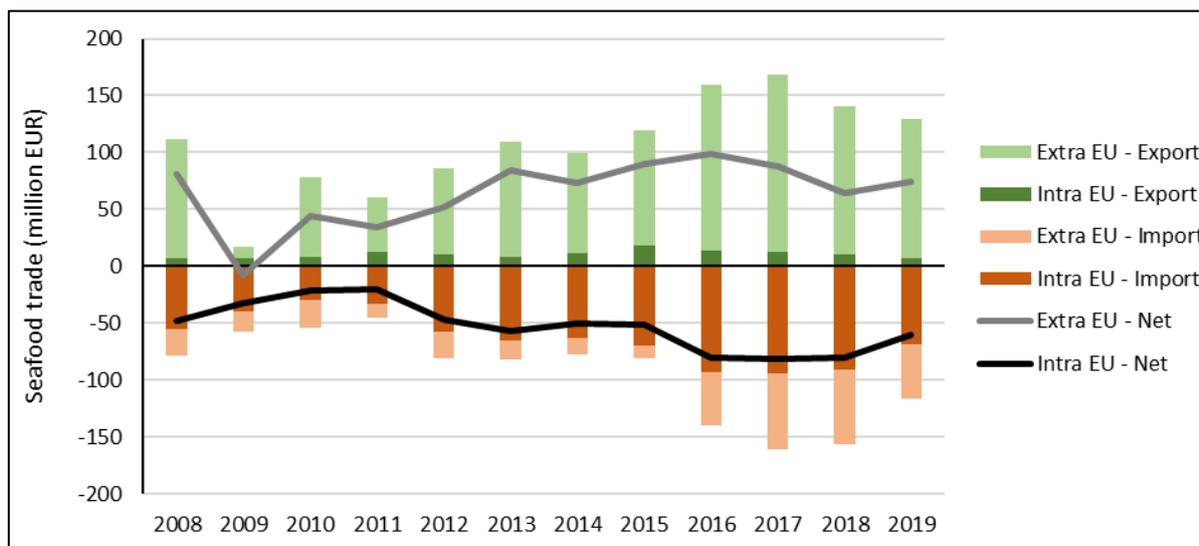
Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The SSCF in Malta, while small in economic terms, has an important social significance. The fleet is mainly artisanal, seasonal, and sells to local markets. Similar to many other Member States, these are issues attracting young people to the sector.

The poor ecological status of many fish stocks in the Mediterranean Sea has reduced fishing opportunities, although this is partially compensated by increases in prices for key species. This linkage assumes that fish prices in local markets are not determined externally. National fisheries experts do not identify seafood imports as a significant issue for the Maltese fishing fleet (STECF, 2019).

Malta is a consistent net importer of seafood at the intra-EU level and a net exporter of seafood at the extra-EU level with both trends increasing with the level of trade.

**Maltese intra and extra EU seafood trade**



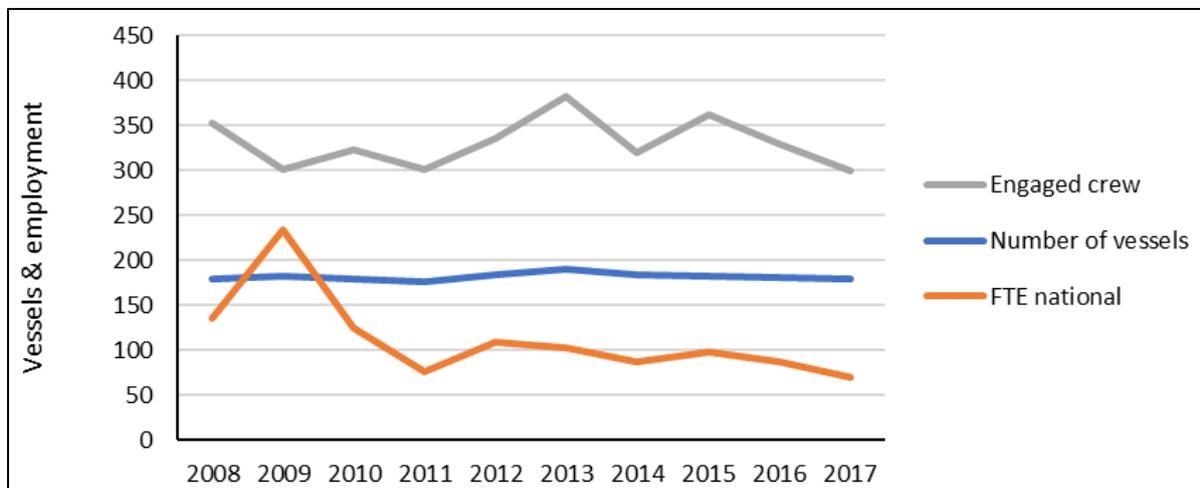
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are tuna (Tunisia, Libya, Morocco), sardine (Morocco), herring (Norway, South Korea), and mackerel (Morocco). Tuna represents over 70% of extra-EU imports (Eumofa, 2020a).

## Netherlands

In 2017, the Dutch SSCF consisted of 179 vessels employing 300 fishers (70 full-time equivalents). While the number of vessels is stable, FTE employment is trending downward.

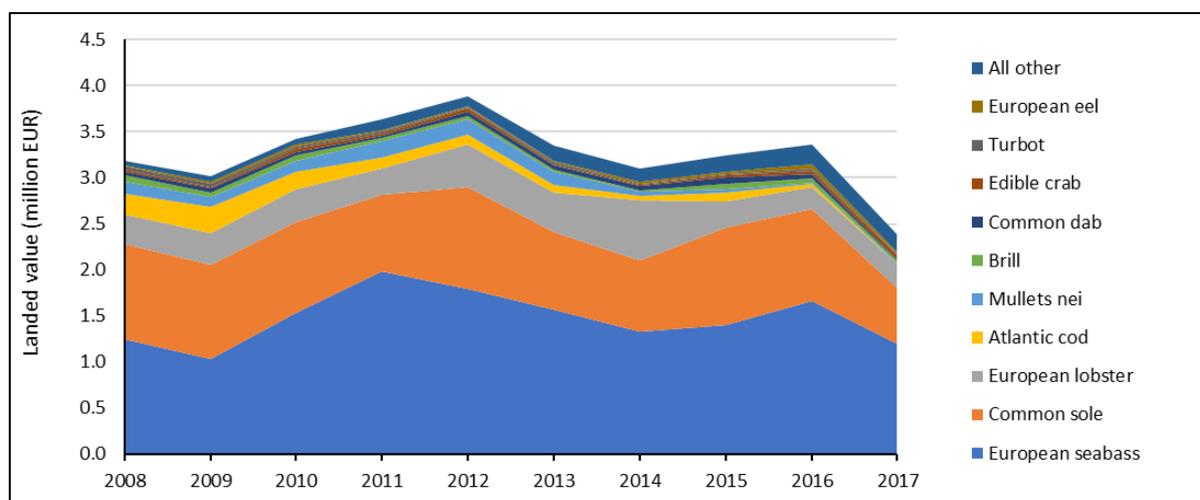
**Dutch SSCF vessels and employment**

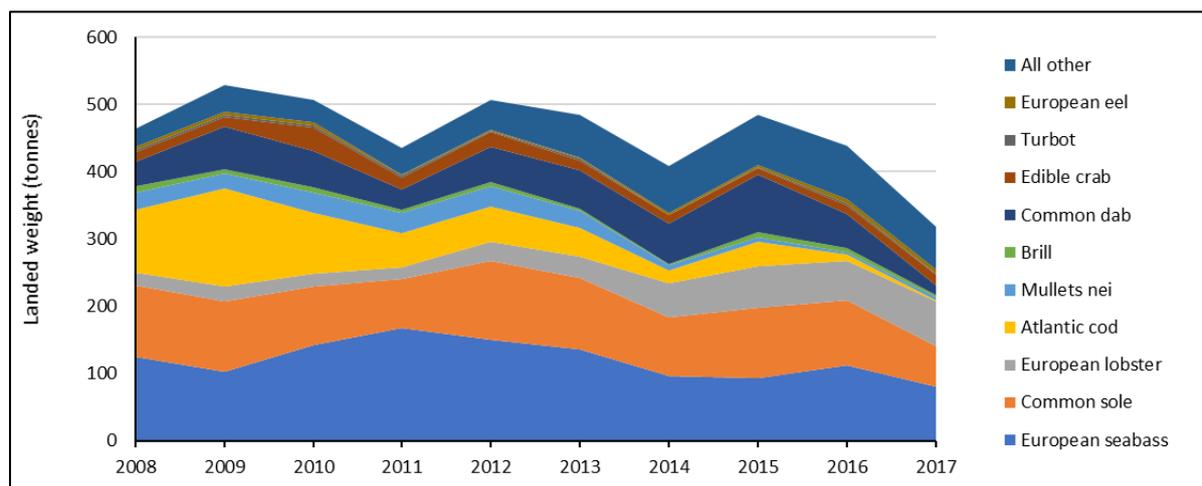


Source: Authors' calculations based on STECF, 2019.

Seabass is the most important SSCF fishery constituting half of the landed value with sole constituting a further quarter. Both landed value and quantity are trending downward.

**Dutch SSCF landings by value and quantity**

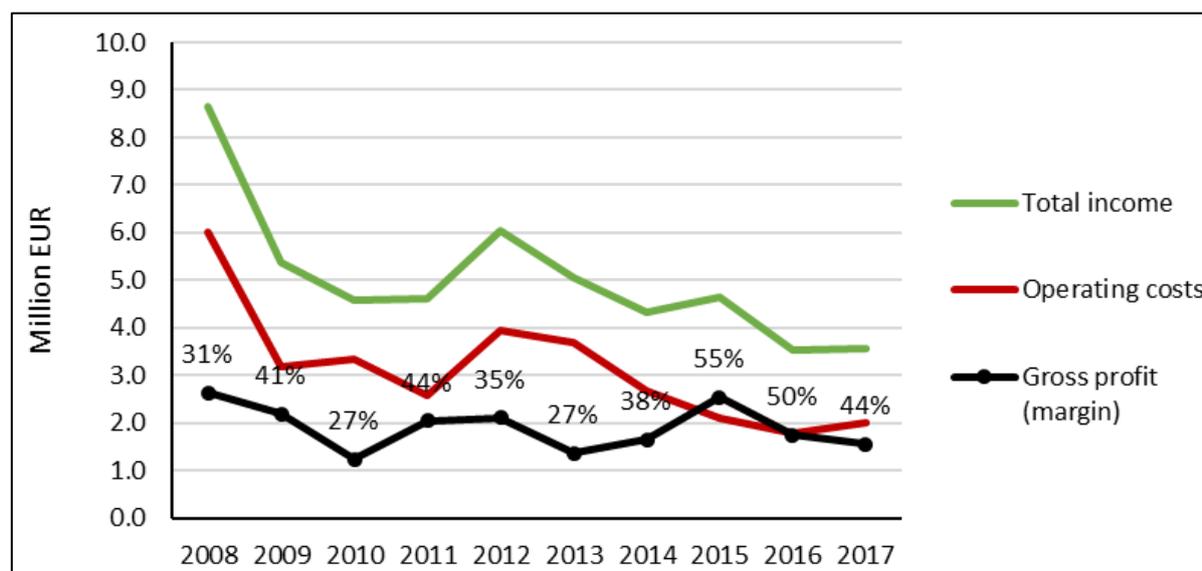




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Over the past decade total income has sharply declined for the Dutch SSCF. As operating costs have also declined in proportion, profits remain fairly stable at EUR 2 million.

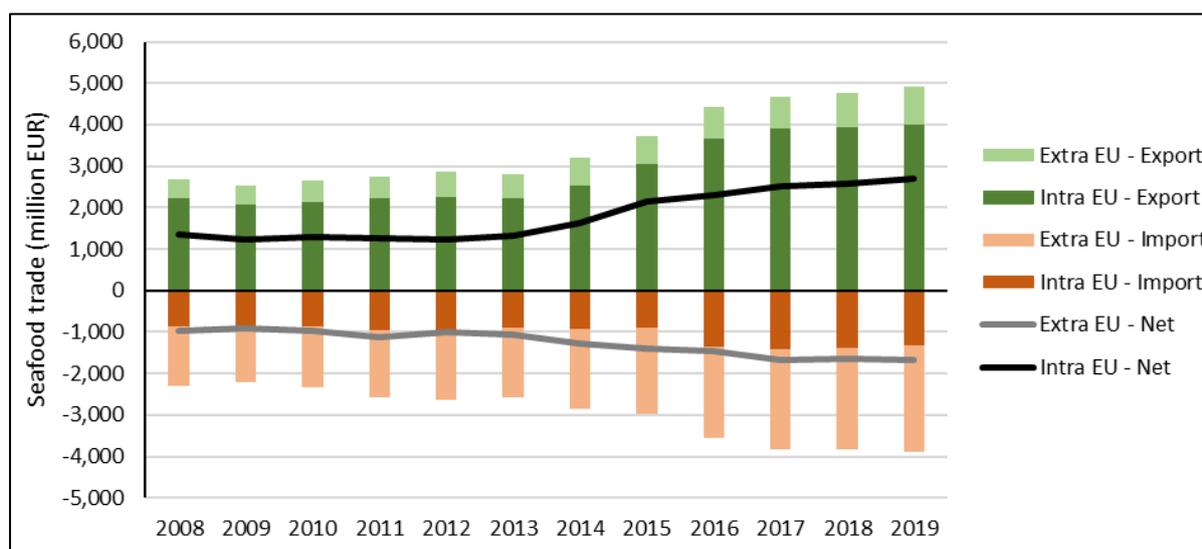
**Dutch SSCF economic performance**



Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The SSCF in the Netherlands is one of the smallest in terms of its proportion to the national fleet (constituting less than 1% of total landings). In many respects, the trends for the SSCF diverge from the more economically significant large-scale fishing fleet in the Netherlands. Much of the SSCF catch is sold locally while the catch from the large-scale sector is sold on the international market. National fisheries experts do not identify seafood imports as a significant issue for the Dutch fishing fleet (STECF, 2019). The Netherlands is a consistent net exporter of seafood at the intra-EU level and a net importer of seafood at the extra-EU level with both trends increasing with the level of trade. This reflects the key role of the Netherlands in the transshipment of seafood into the EU market.

**Dutch intra and extra EU seafood trade**



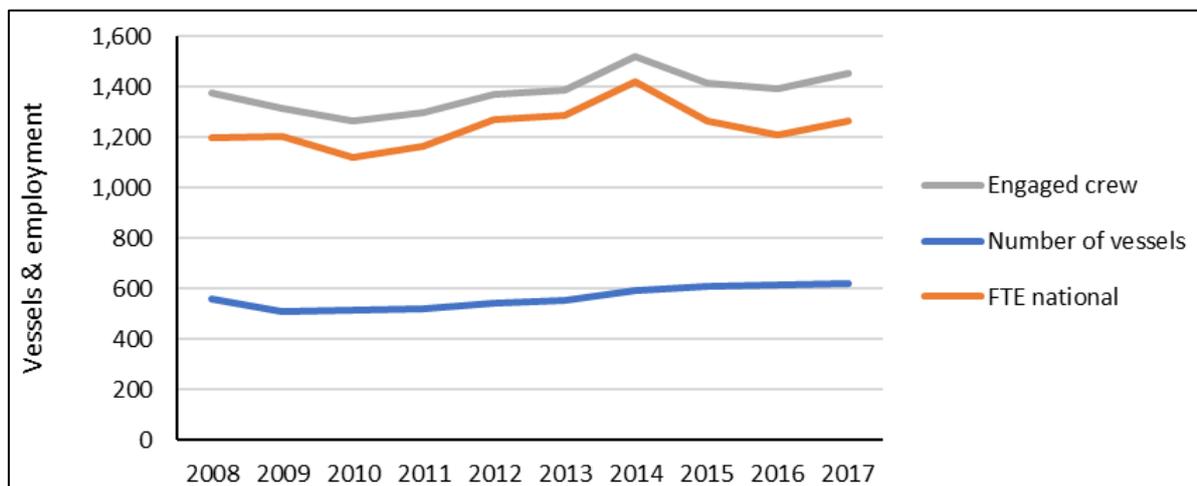
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are cod (Iceland, Russia, Norway), shrimp (Viet Nam, India, Bangladesh), tuna (Ecuador, Mauritius, Papua New Guinea), salmon (Norway, United States), and Alaska pollock (United States) (Eumofa, 2020a). As the Netherlands is a major entry point for imports it is likely that only a small portion of these imports are not consumed in the Netherlands.

## Poland

In 2017, the Polish SSCF consisted of 623 vessels employing 1,456 fishers (1,263 full-time equivalents). Both employment and capacity have been increasing over the last decade, in contrast to the overall EU trend.

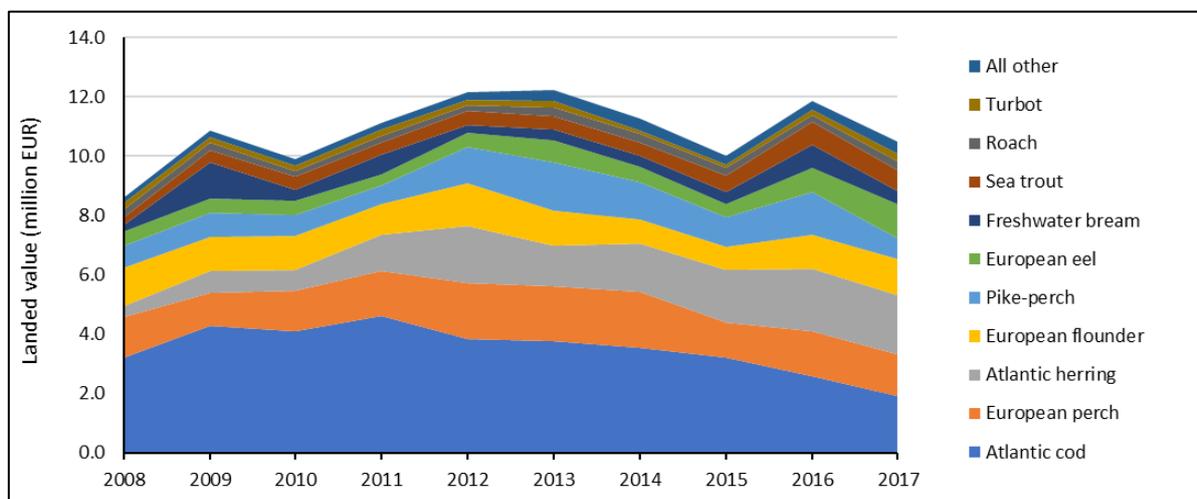
**Polish SSCF vessels and employment**

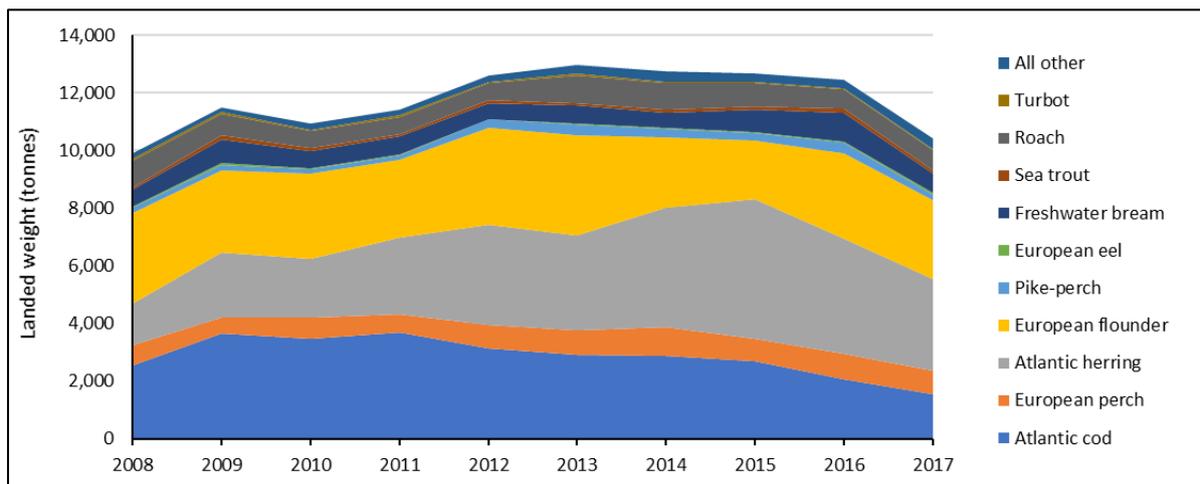


Source: Authors' calculations based on STECF, 2019.

The Polish SSCF has a relatively diverse mix of landings, especially for the Baltic Sea MS, that includes cod, perch, herring, flounder, pike-perch, eel, bream, and sea trout.

**Polish SSCF landings by value and quantity**

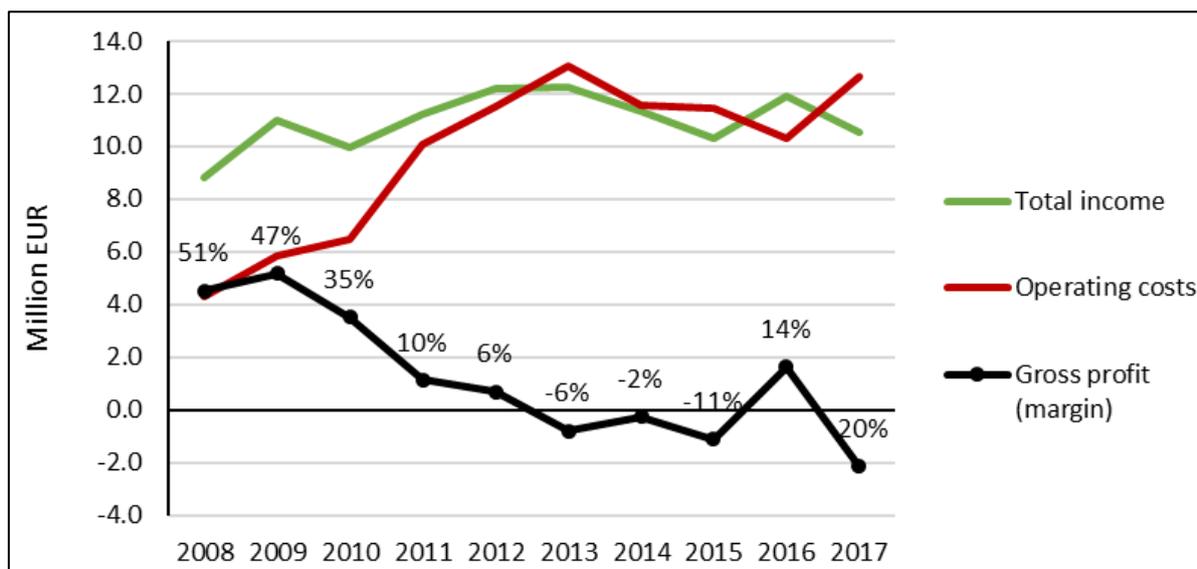




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Over the past decade the Polish SSCF has seen an increasing in operating costs high total income has remained relatively stable around EUR 10 million. The result has been a decline in profits to the point where the fleet is no longer profitable (-20% gross profit margin in 2017).

**Polish SSCF economic performance**

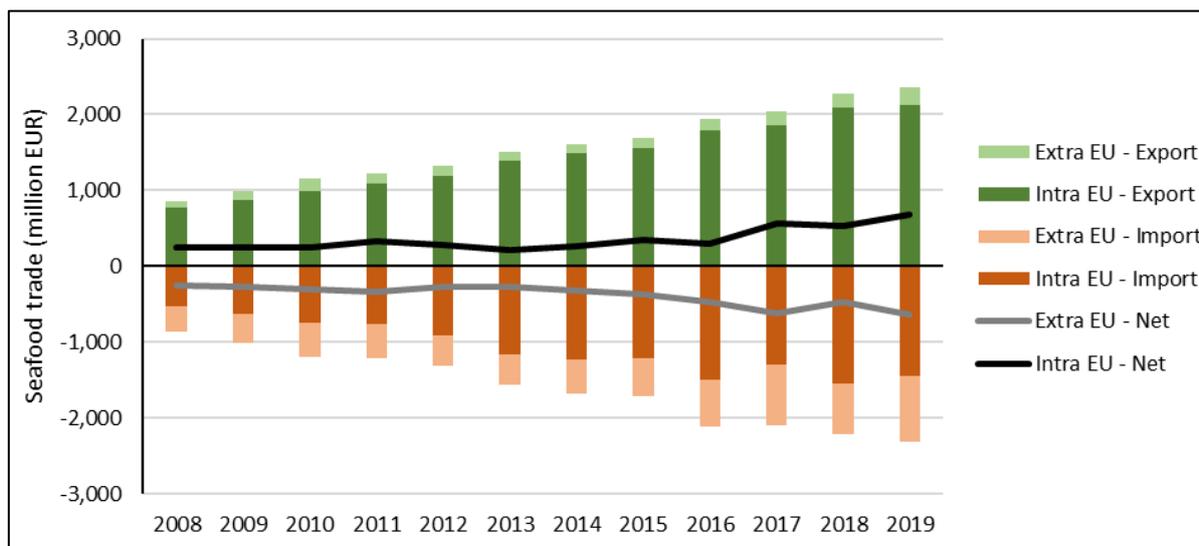


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The poor ecological condition of cod in the Baltic has negatively affected the Polish SSCF in terms of both lower quantities available and lower prices (as the fish are of poorer quality). As the Polish market for fish is oriented towards fish processing there are large volumes of import. As a result, national fisheries experts note that “the Polish market is dominated by imported fish and highly dependent on global market prices. This has indirect impact on the fisheries incomes by influencing first sale prices offered to fishers” (STECF, 2019). It is also noted, however, that “an upward trend in retail prices of fish and fish products has been observed on Polish market in recent years” (STECF, 2019).

The Netherlands is a consistent net exporter of seafood at the intra-EU level and a net importer of seafood at the extra-EU level with both trends increasing with the level of trade.

**Polish intra and extra EU seafood trade**



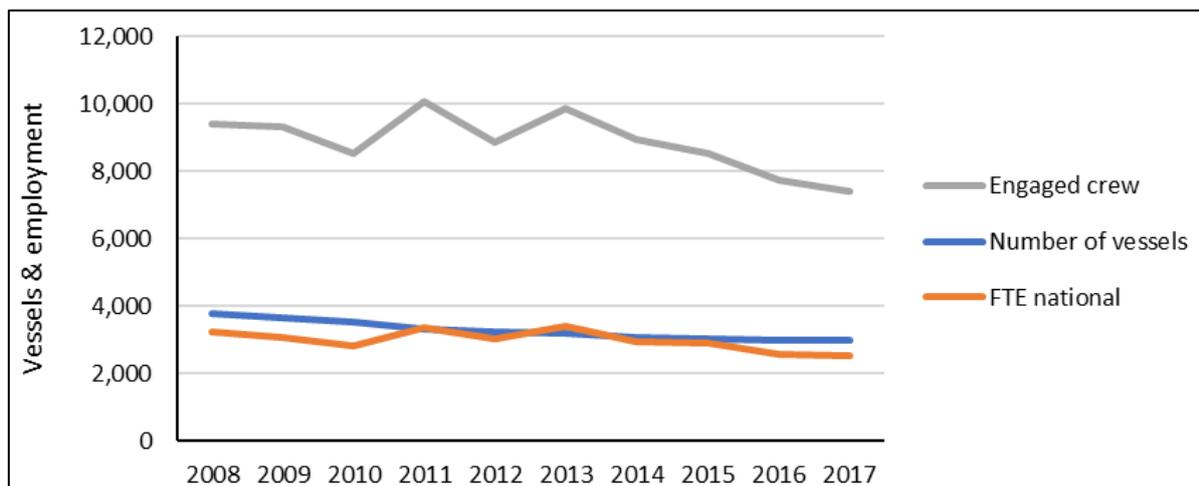
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are salmon (Norway). Alaska pollock (China, United States), herring (Norway), cod (Russia), and mackerel (Iceland) (Eumofa, 2020a).

## Portugal

In 2017, the Portuguese SSCF consisted of 3,004 vessels employing 7,412 fishers (2,524 full-time equivalents). Both employment and capacity have slightly declined over the past decade in line with the overall EU trend.

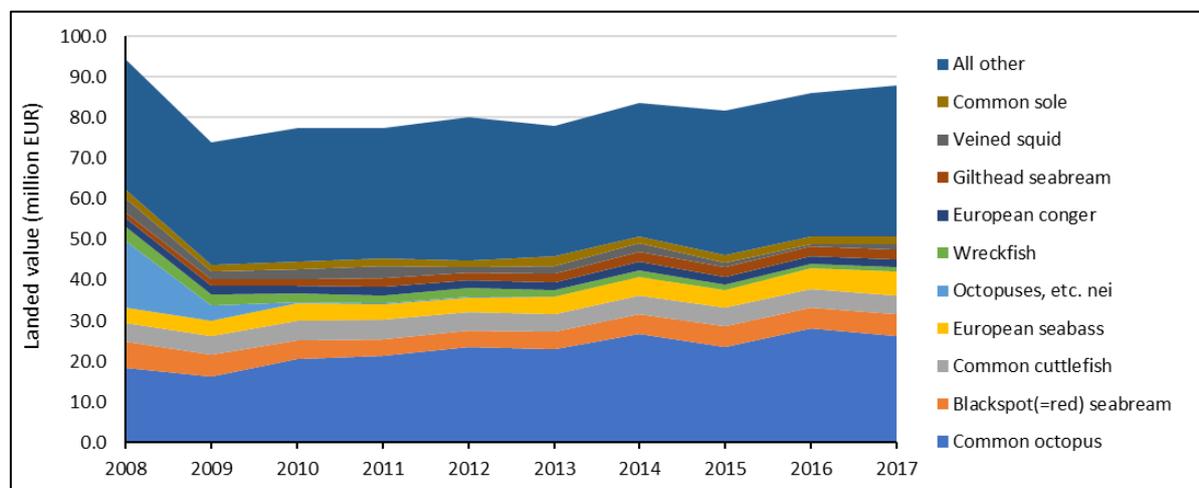
**Portuguese SSCF vessels and employment**

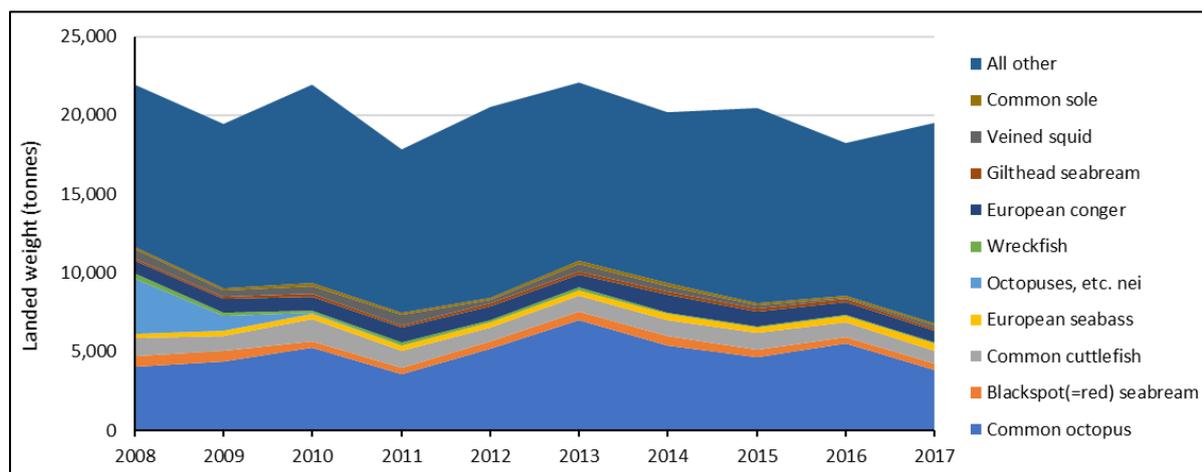


Source: Authors' calculations based on STECF, 2019.

Octopus is the main fishery for the Portuguese SSCF, although the species mix is quite diverse with landings from species including blackspot seabream, cuttlefish, and seabass.

**Portuguese SSCF landings by value and quantity**

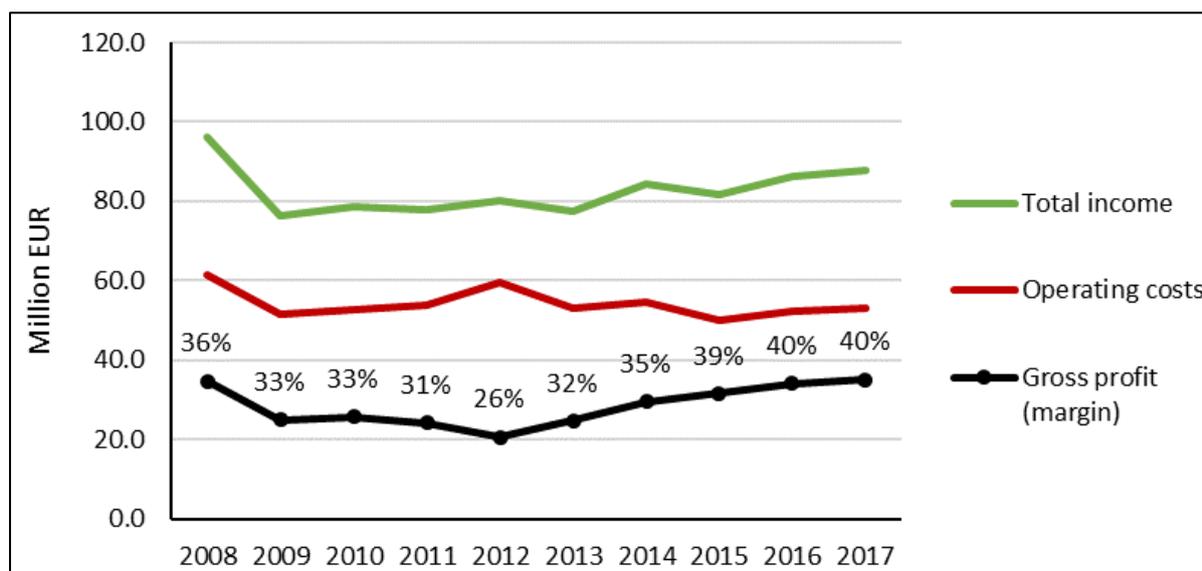




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Over the past decade there has been a steady increase to the total income of the Portuguese SSCF. As operating costs have remained relatively stable over this period the result is that fleet profits and profitability are reaching record highs (EUR 36 million and 40% in 2017).

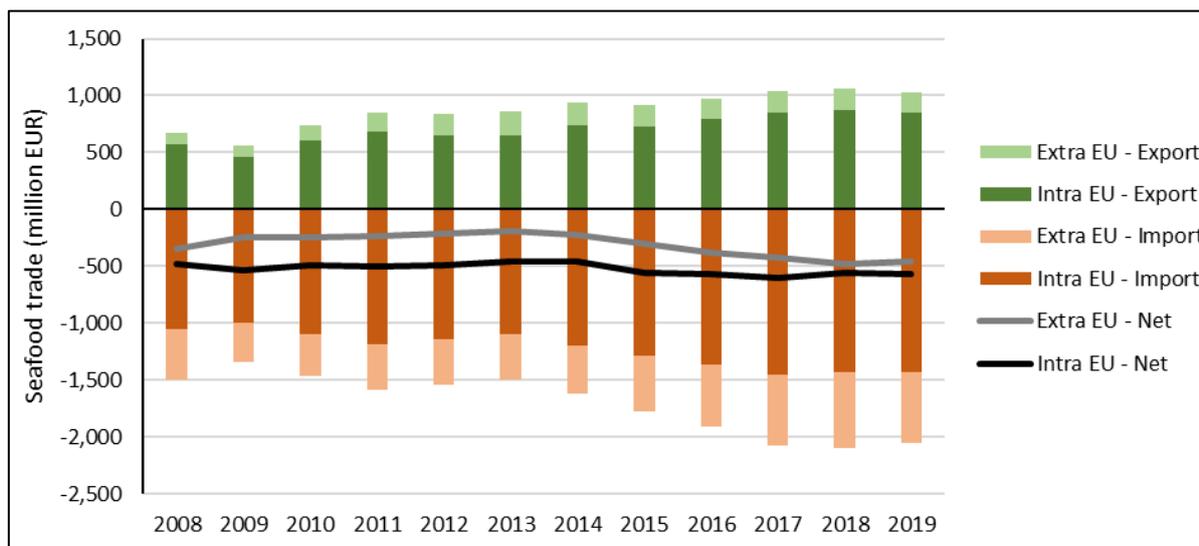
**Portuguese SSCF economic performance**



Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic improvement of the Portuguese fishing fleet is credited to higher fish prices for many species, lower fuel costs, and a reduction in effort. The ecological condition of fish stocks is very mixed. National fisheries experts do not identify seafood imports as a significant issue for the Portuguese fishing fleet (STECF, 2019). Portugal is a consistent net importer of seafood at the both the intra-EU and extra-EU level (EUR 608 million and EUR 486 million respectively).

**Portuguese intra and extra EU seafood trade**



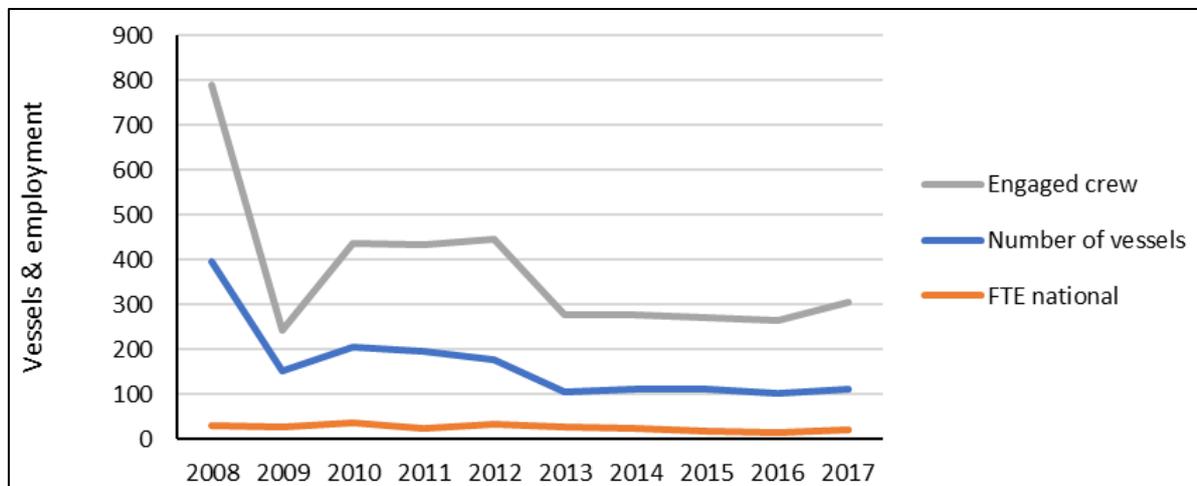
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Portugal has a diverse mix of extra-EU imports, the largest of which are cod (Russia), shrimp (Mozambique, India), octopus (Mauritania, Morocco), squid (China, India), and hake (Namibia, South Africa) by value (Eumofa, 2020a).

## Romania

In 2017, the Romanian SSCF consisted of 111 vessels employing 307 fishers (22 full-time equivalents). Both employment and capacity have remained stable in recent years.

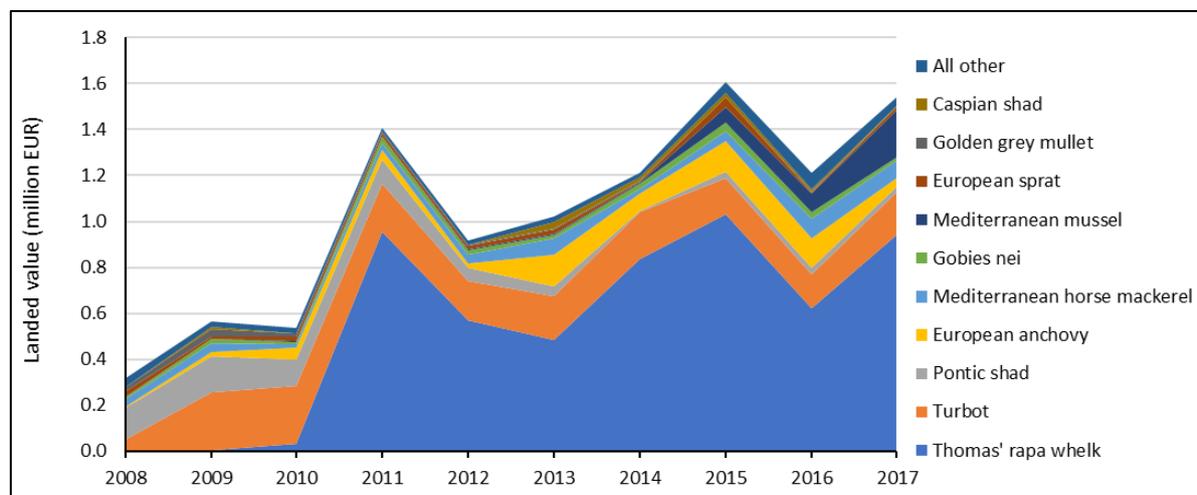
**Romanian SSCF vessels and employment**

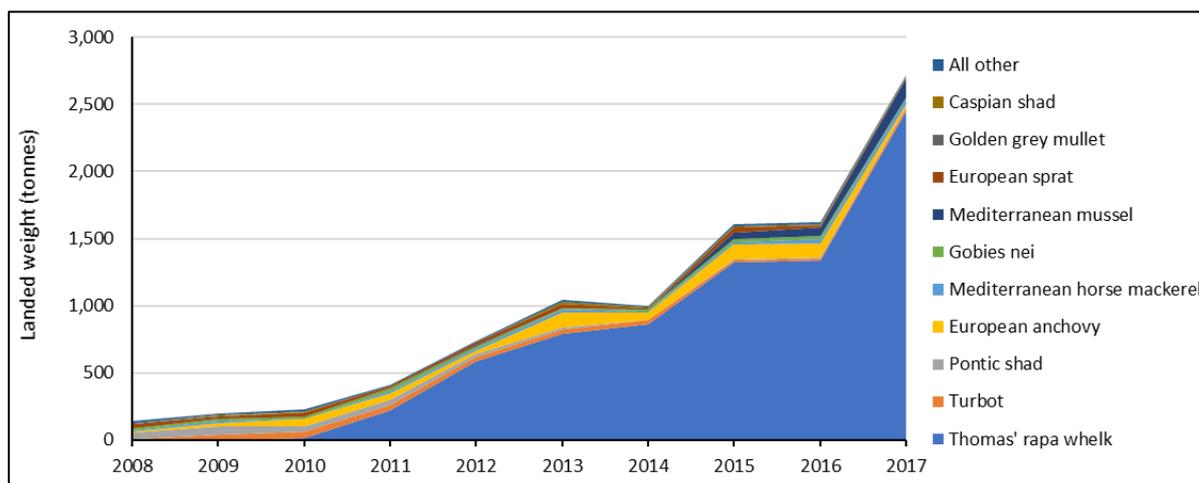


Source: Authors' calculations based on STECF, 2019.

Thomas' rapa whelk is the main fishery for the Romanian SSCF, constituting over 60% of the landed value and 90% of the landed value. Landings by both weight and value are dramatically increasing.

**Romanian SSCF landings by value and quantity**

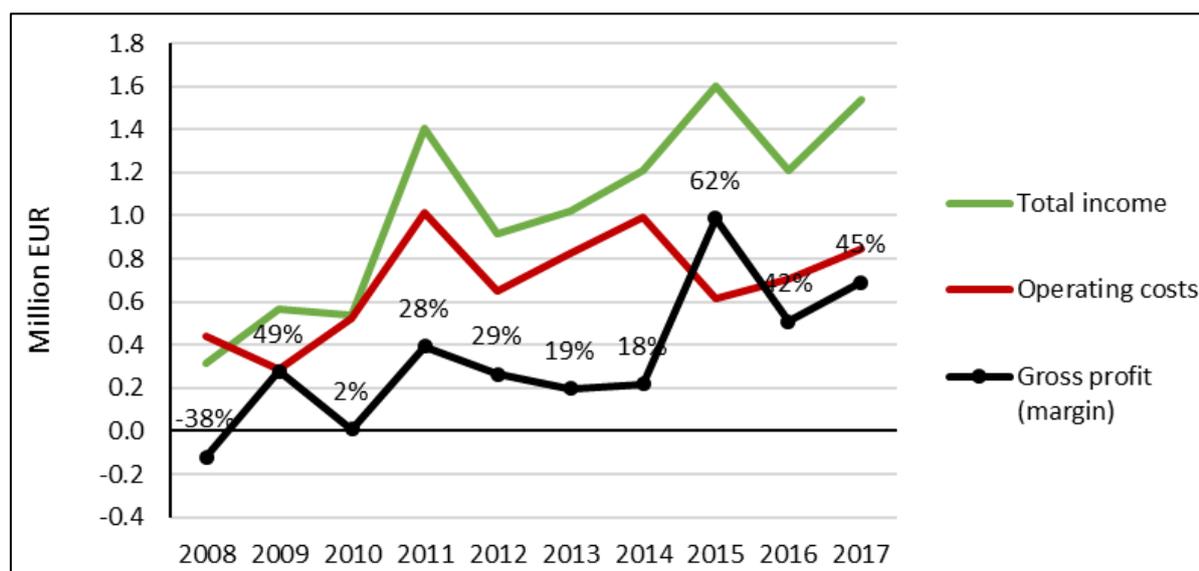




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Over the past decade there has been a steady increase to the total income of the Romanian SSCF. As this rise has outpaced the increase in operating costs over the same period, the result is that fleet profits and profitability are improving.

**Romanian SSCF economic performance**

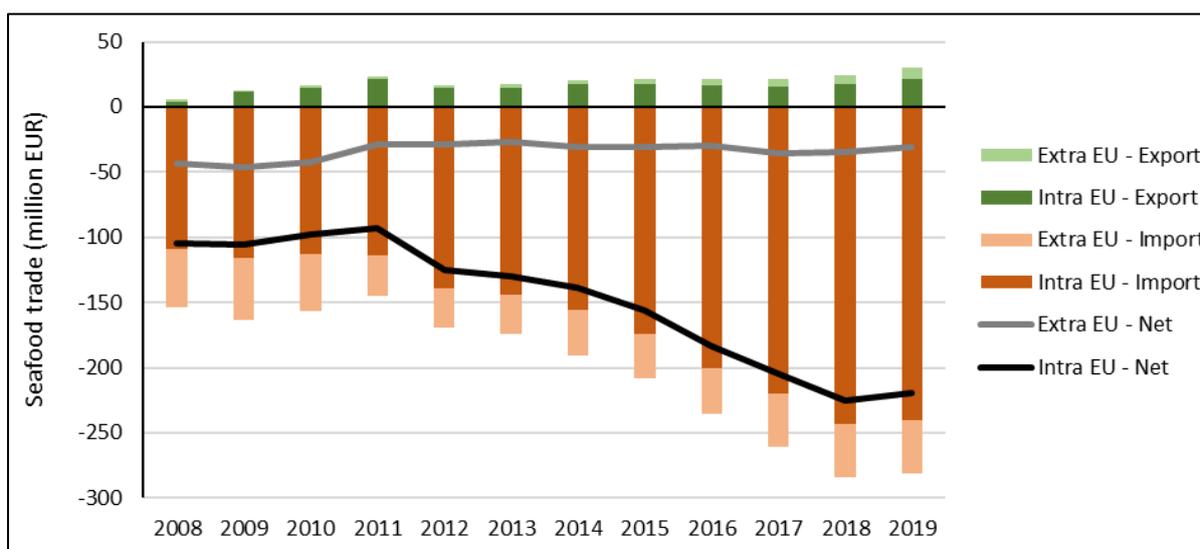


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Compared to other Member States, the Romanian SSCF composes a large share of the fleet (72% of the vessels, 76% of the employment, and 36% of the landed value).

Romania is a consistent net importer of seafood at the both the intra-EU and extra-EU level (EUR 249 million and EUR 35 million respectively in 2019).

**Romanian intra and extra EU seafood trade**



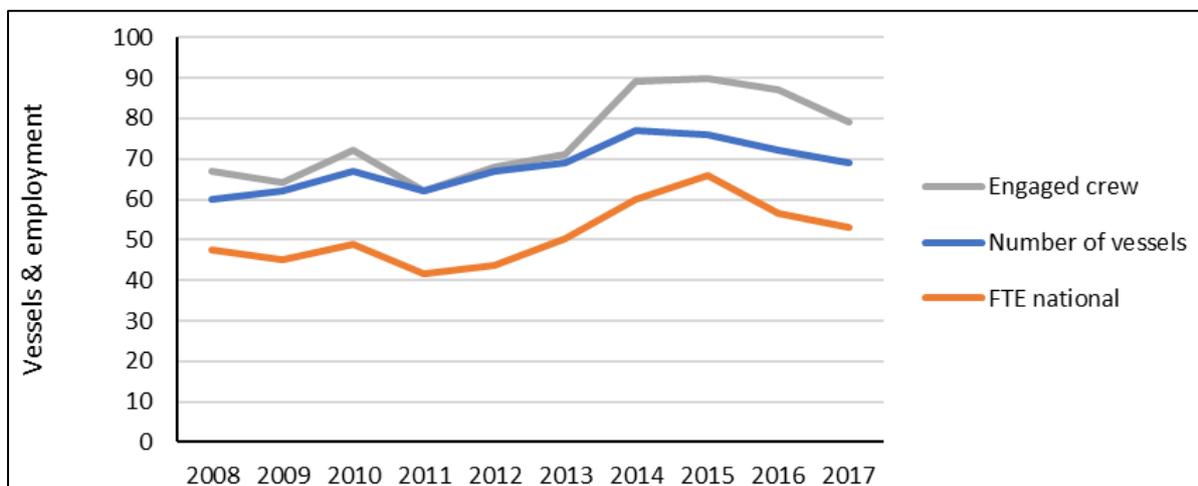
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are trout (Turkey), tuna (Philippines, Viet Nam, Ecuador), Nile perch (Tanzania), sardine (Morocco), and freshwater catfish (Viet Nam) (Eumofa, 2020a).

## Slovenia

In 2017, the Slovenian SSCF consisted of 69 vessels employing 79 fishers (53 full-time equivalents). Both employment and capacity were trending upwards from 2011 to 2014 but have declined from 2015 to 2017.

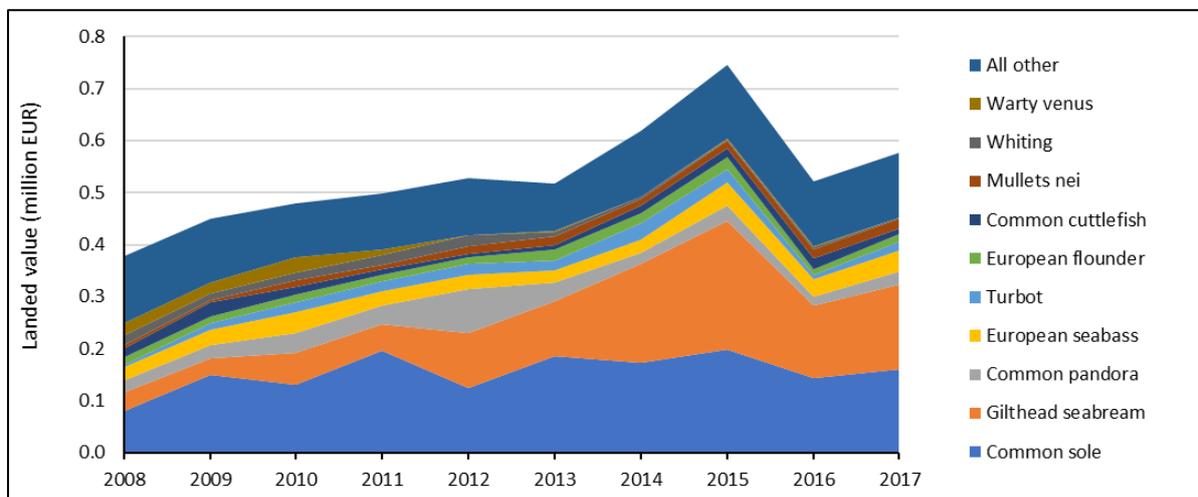
**Slovenian SSCF vessels and employment**

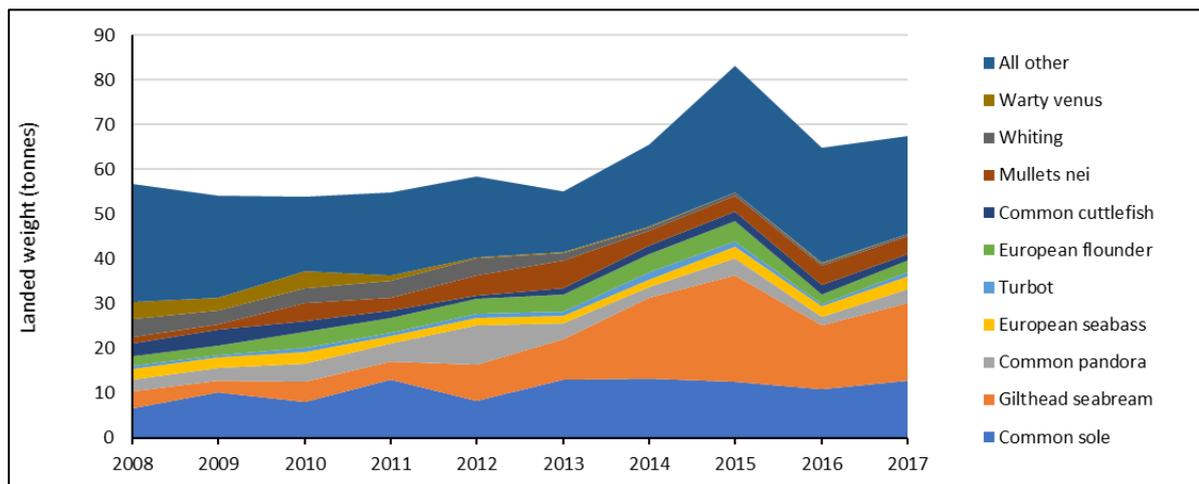


Source: Authors' calculations based on STECF, 2019.

The two main fisheries for the Slovenian SSCF are sole and gilthead seabream. Over the past decade there has been an upward trend in both landed weight and landed value.

**Slovenian SSCF landings by value and quantity**

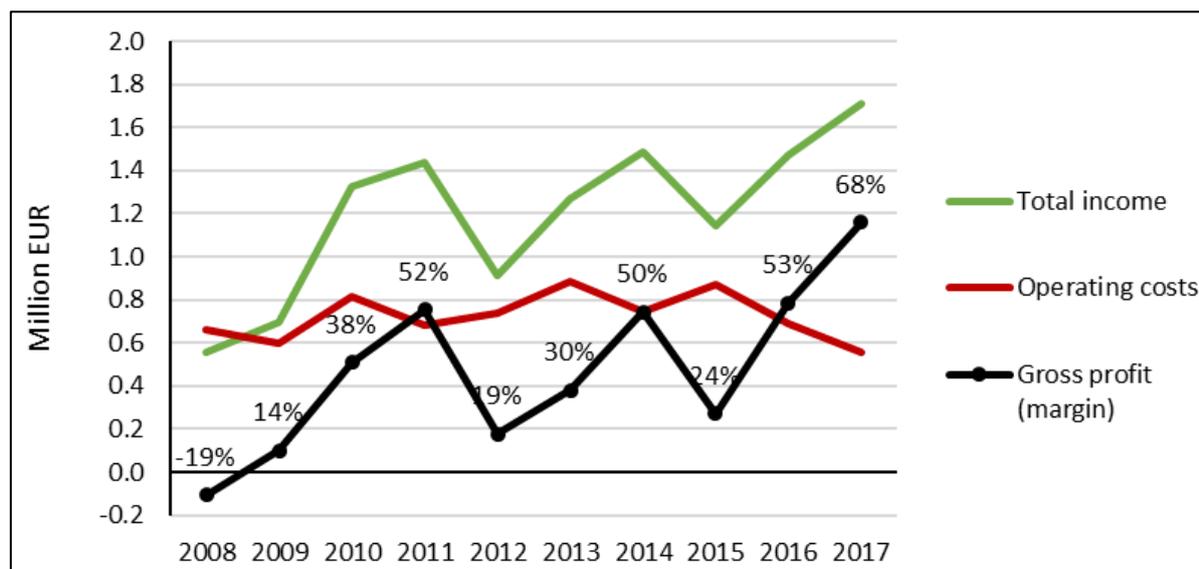




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Slovenia SSCF has been steadily improving with the upward trend in total income outpacing operating costs which have remained stable. The result is that fleet profits and profitability are reaching record highs (EUR 1.2 million and 68% in 2017).

**Slovenian SSCF economic performance**

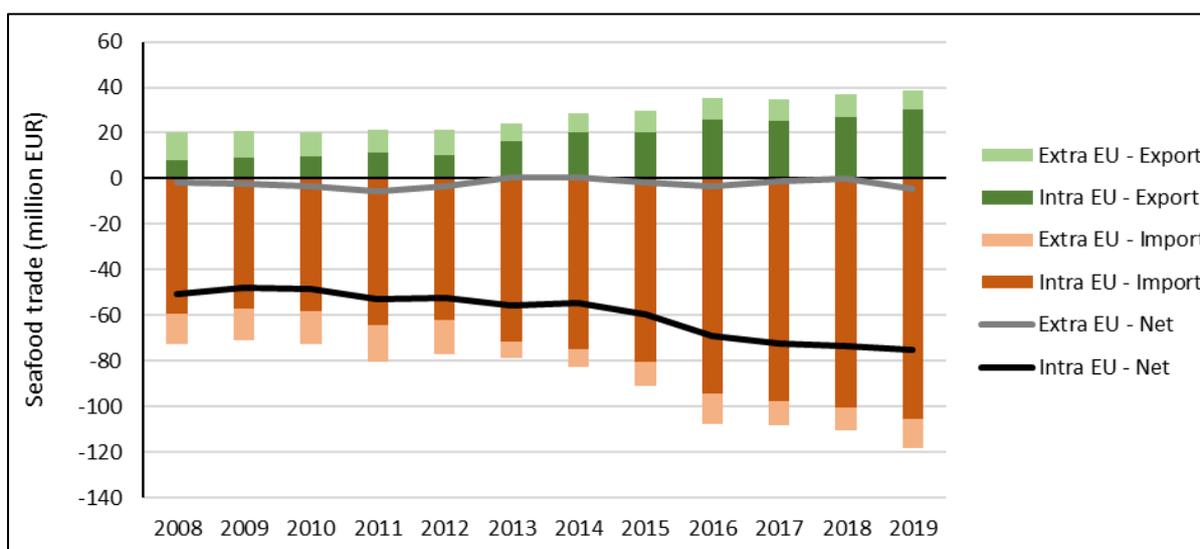


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

A weak market for seafood, poorly equipped vessels, and “discordance among fishing, producing and marketing capabilities are among” are identified as the main drivers for a fall in Slovenia landings since the early 1990s (and independence). Competition at sea for space, especially due to the common routing system and traffic separation scheme in the Northern Adriatic, is also causing problems in the fishing industry. National fisheries experts do not identify seafood imports as a significant issue for the Slovenian fishing fleet (STECF, 2019).

While Slovenia’s extra-EU fish trade is roughly balanced, it is a large and increasing net importer of seafood at the intra-EU level (EUR 80 million in 2019).

**Slovenian intra and extra EU seafood trade**



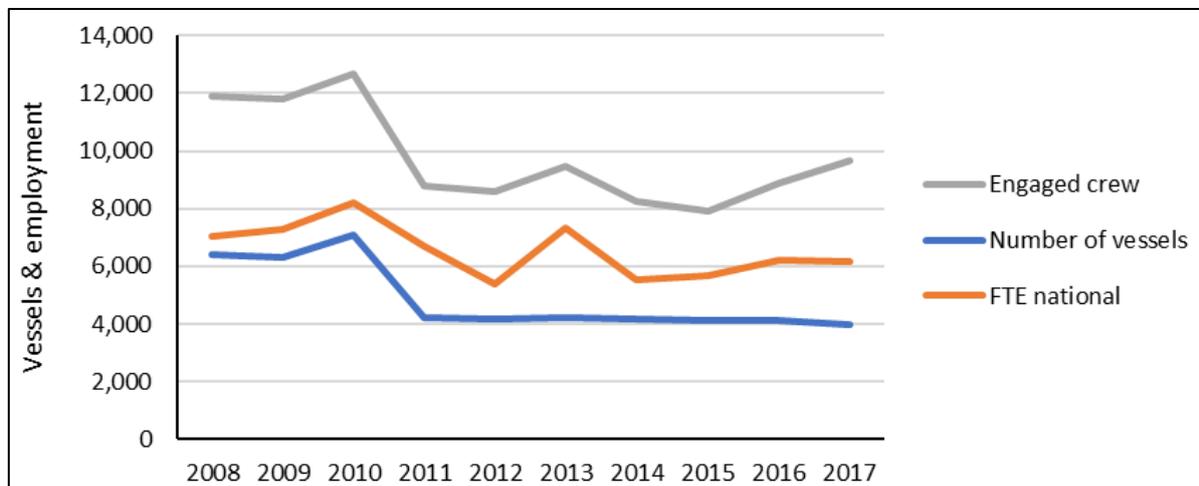
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are catfish (Viet Nam), squid (South Arica), trout (Turkey, Bosnia and Herzegovina), and hake (Argentina) (Eumofa, 2020a).

## Spain

In 2017, the Spanish SSCF consisted of 3,957 vessels employing 9,664 fishers (6,189 full-time equivalents). Both employment and capacity have remained stable in recent years.

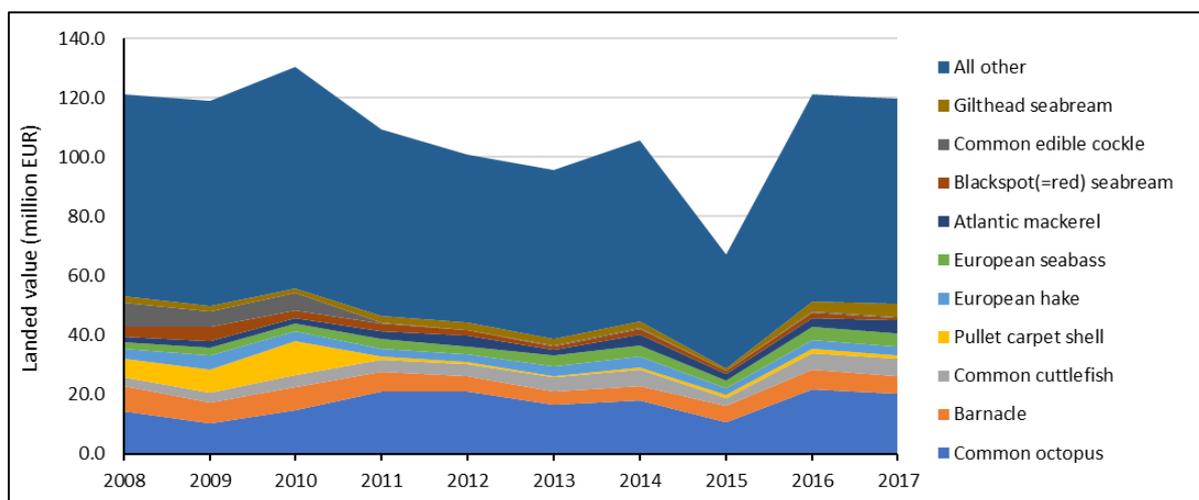
**Spanish SSCF vessels and employment**

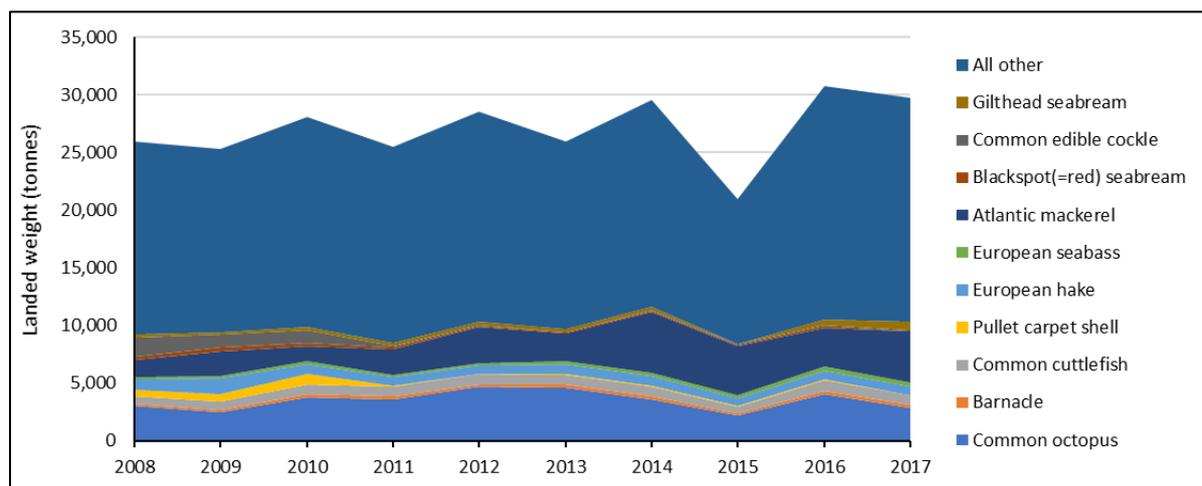


Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Octopus is the main fishery for the Spanish SSCF, although the species mix is quite diverse with landings from species including barnacle, cuttlefish, pullet carpet shell, and hake.

**Spanish SSCF landings by value and quantity**

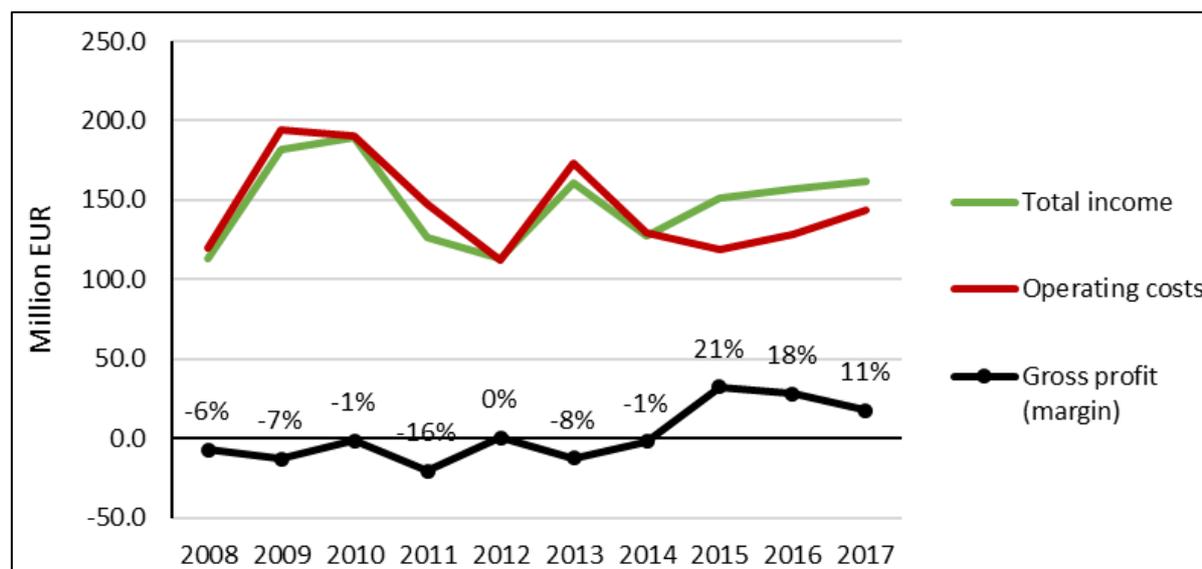




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Spanish SSCF is improving with the fleet becoming profitable in recent years (11% in 2017). The Spanish SSCF is a smaller share of the total national fleet compared to other large fishing nations like Greece, Italy, France due to vessel size and the types of fishing gear that are used. Approximately half the Spanish SSCF fishes a season of less than 90 days.

**Spanish SSCF economic performance**

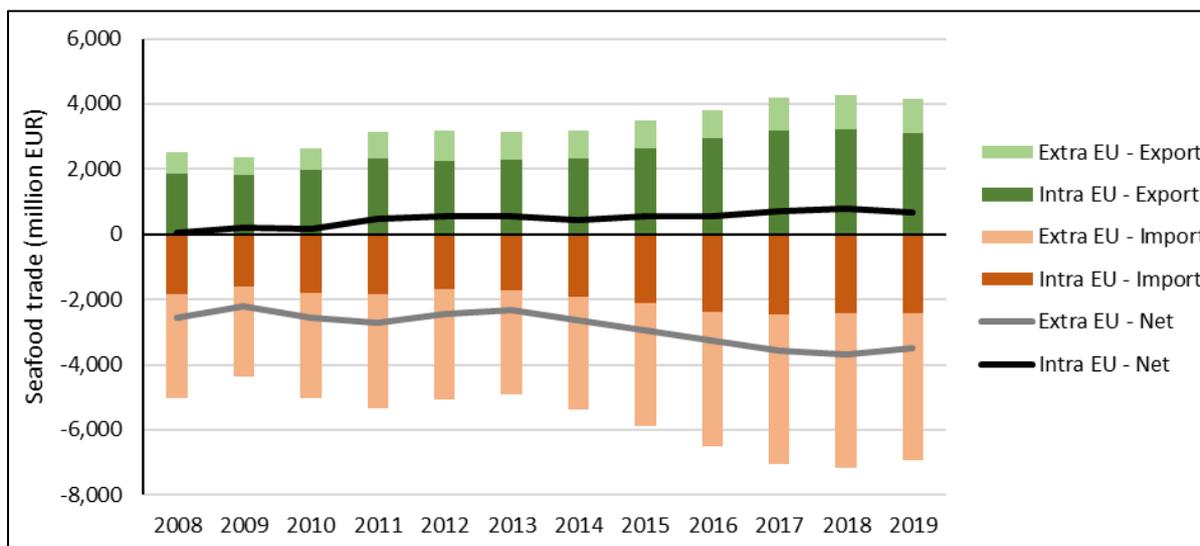


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Given the large of number of diverse Spanish SSCF fisheries it is difficult to generalise of the main economic drivers. Depending on the fishery, poor ecological conditions, lower TACs, the landing obligation, certification requirements, and effort management measures may be more or less relevant. National fisheries experts do not identify seafood imports as a significant issue for the Spanish fishing fleet (STECF, 2019).

Spain is a small net exporter of seafood at the intra-EU level (EUR 0.7 billion in 2019) and a large net importer of seafood at the extra-EU level (EUR 3.6 billion in 2019). For some species Spain is a key entry point to the EU market and it is likely that only a significant portion of these imports are consumed in other EU Member States.

**Spanish intra and extra EU seafood trade**



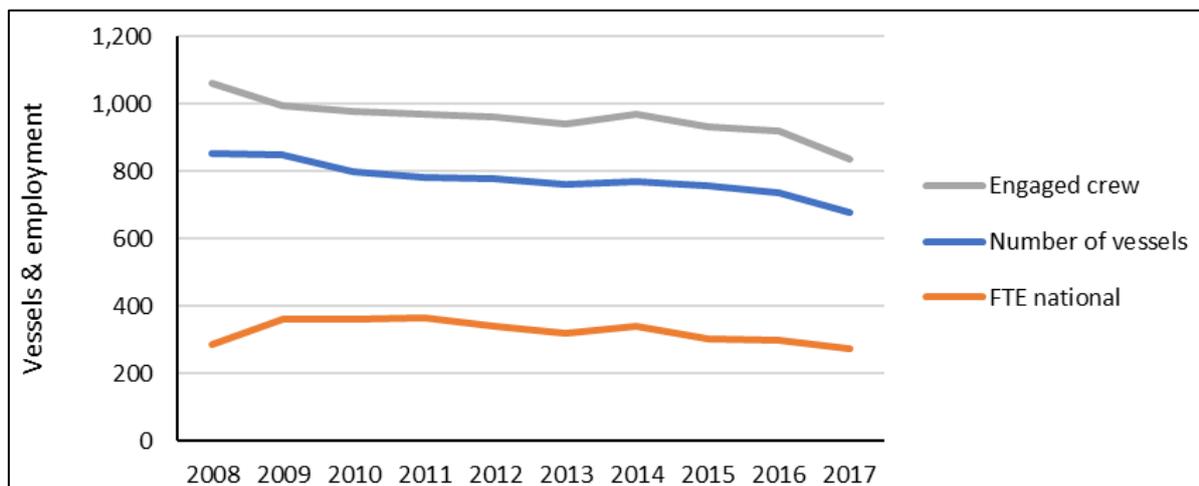
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are squid (Falkland Islands, China, India, Morocco), shrimp (Argentina, Ecuador, China), octopus (Morocco), tuna (Ecuador), and hake (Namibia, Argentina, Chile) – all over EUR 300 million per year (Eumofa, 2020a).

## Sweden

In 2017, the Swedish SSCF consisted of 680 vessels employing 836 fishers (275 full-time equivalents). Both employment and capacity have slightly declined over the past decade in line with the overall EU trend.

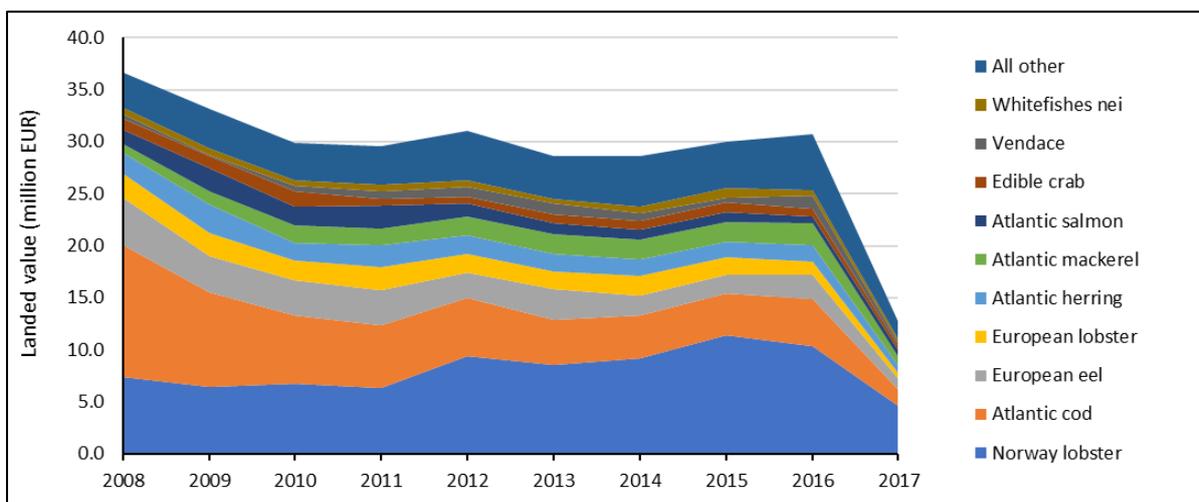
**Swedish SSCF vessels and employment**

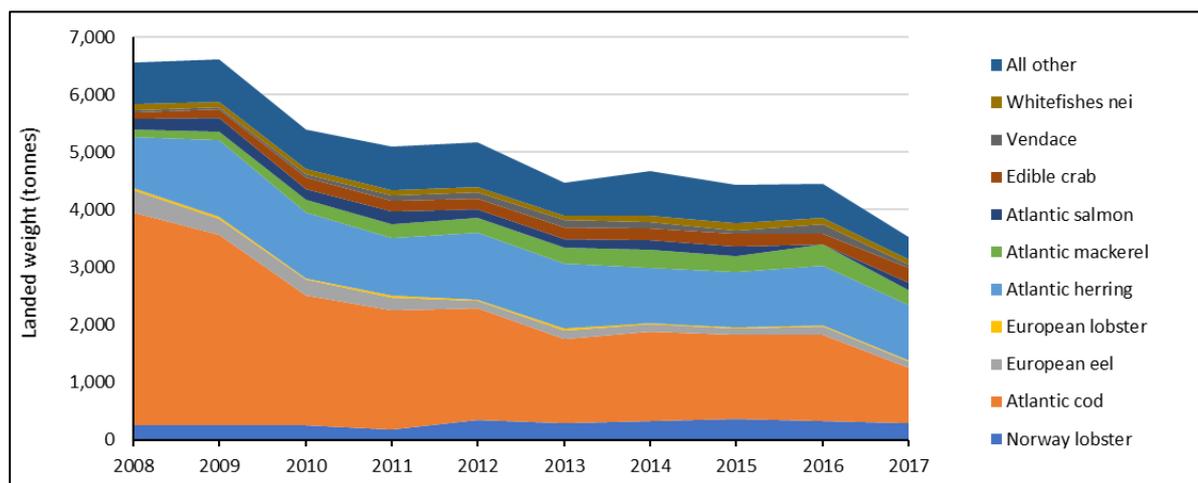


Source: Authors' calculations based on STECF, 2019.

Norway lobster is the main fishery for the Swedish SSCF, with smaller fisheries for cod, eel, and lobster. In 2017 the value of landings plunged dramatically.

**Swedish SSCF landings by value and quantity**

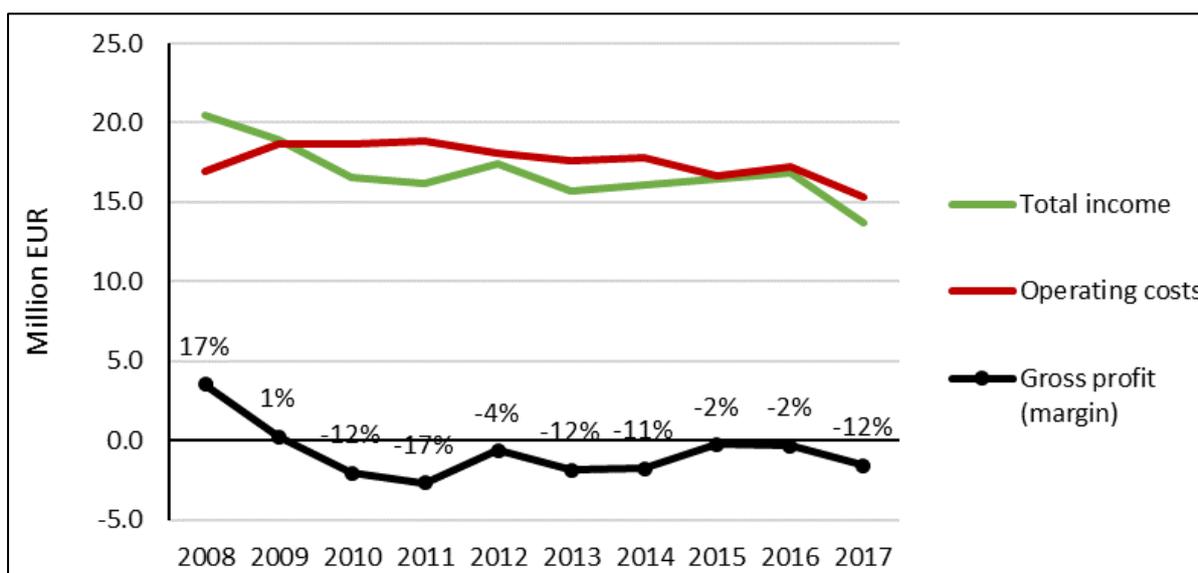




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The economic performance of the Swedish SSCF stable with both total income and operating around EUR 15 million per year. The result is that the Swedish SSCF remains slightly unprofitable (falling to -12% in 2017).

#### Swedish SSCF economic performance

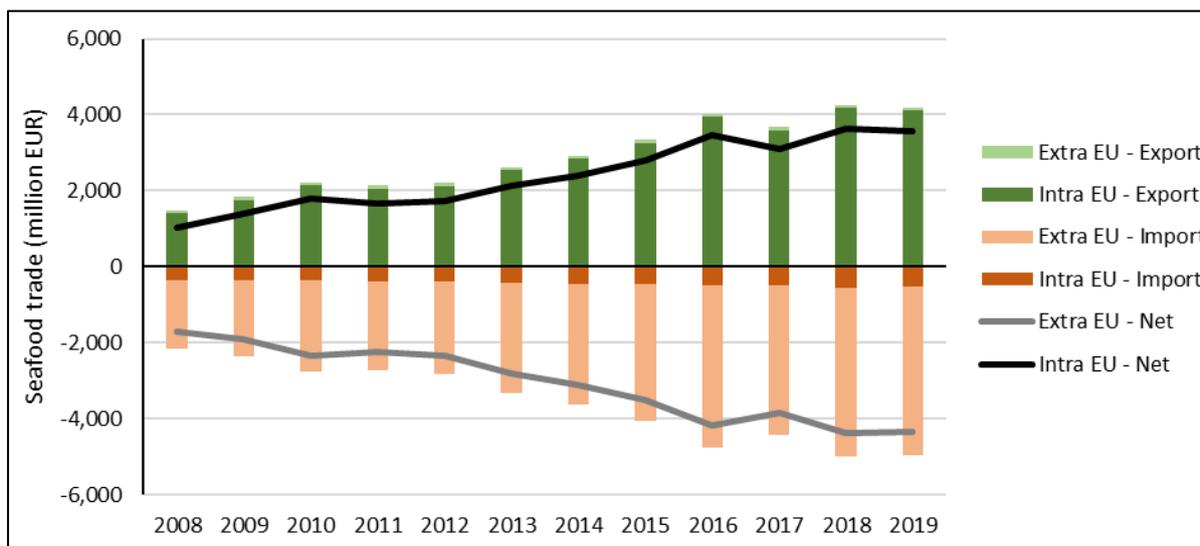


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Part of the low economic performance for the Swedish SSCF is credited to motives other than profit (e.g. part-time employment, personal identity). This, in turn, can create other issues such as a lack of available licences for new entrants. One of the major issues for the Swedish SSCF is a lack of market, resulting in logistical problems for selling and distributing fresh fish to the rest of Sweden from the east coast. While prices for most species are determined externally, national fisheries experts do not identify seafood imports as a significant issue for the Swedish fishing fleet (STECF, 2019).

Sweden is a significant net exporter of seafood at the intra-EU level (EUR 3.5 billion in 2019) and a significant net importer of seafood at the extra-EU level (EUR 4.1 billion in 2019). This reflects the key role of Sweden in the transshipment of seafood into the EU market from Norway.

**Swedish intra and extra EU seafood trade**



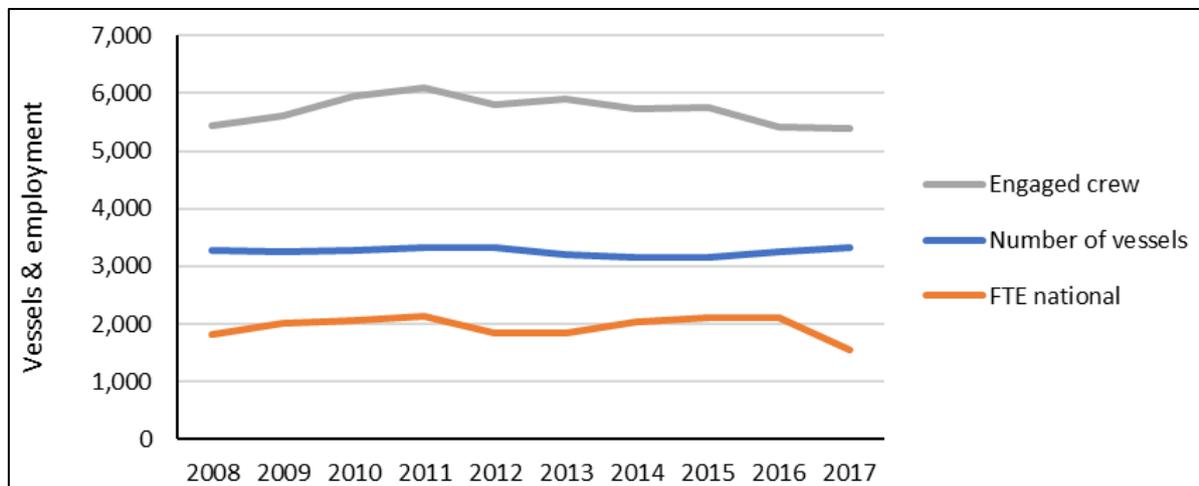
Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Salmon from Norway is the largest extra-EU import by value, constituting EUR 4 billion and 80% of the value of seafood imports in 2019. Cod from Norway is the second largest flow (EUR 0.4 billion) (Eumofa, 2020a).

## United Kingdom

In 2017, the UK SSCF consisted of 3,337 vessels employing 5,390 fishers (1,558 full-time equivalents). Both employment and capacity have relatively stable over the past decade.

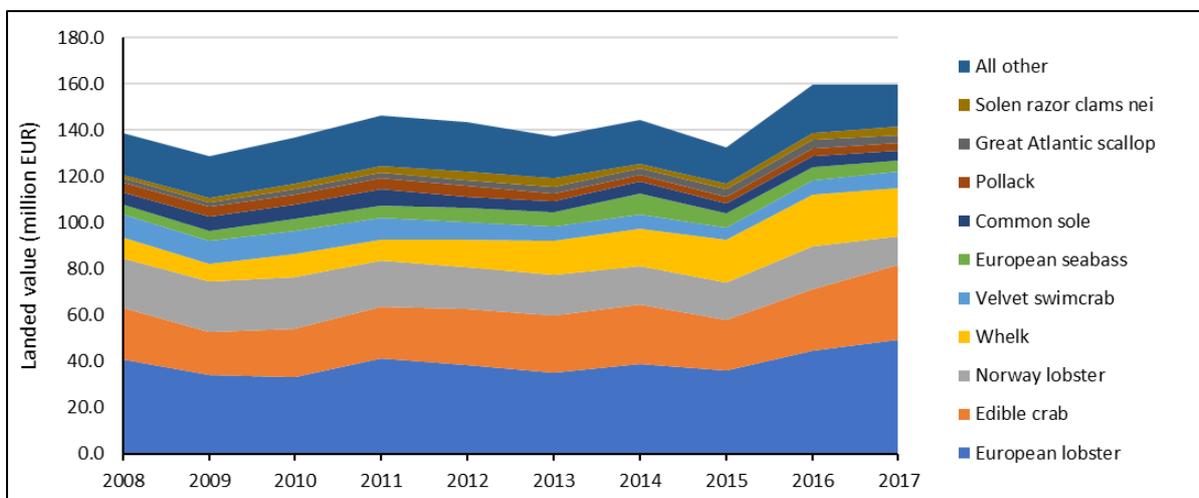
**UK SSCF vessels and employment**

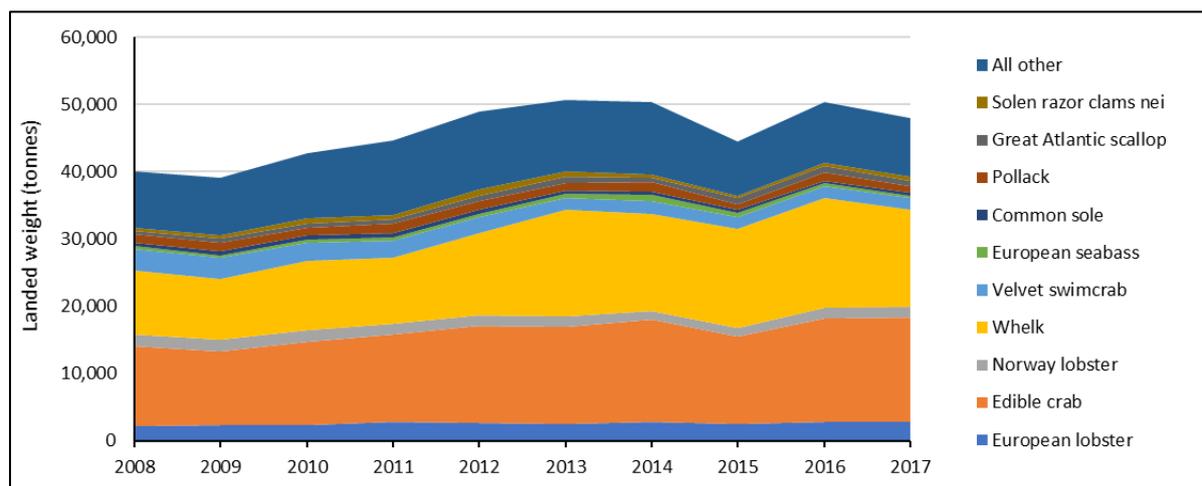


Source: Authors' calculations based on STECF, 2019.

The main UK SSCF fisheries are all shellfish: lobster, crab, Norway lobster, and whelk. By weight crab and whelk constitute 62% of landings. The value of landings is trending strongly upward.

**UK SSCF landings by value and quantity**

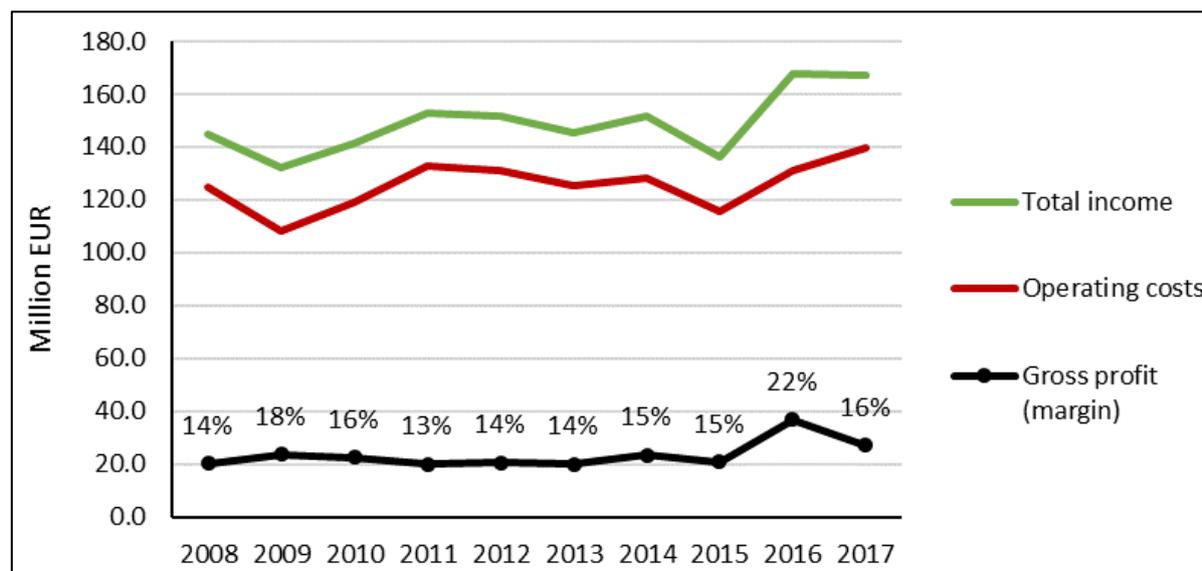




Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Total income for the UK SSCF is increasing year-on-year. While operating costs are also increasing, the trend is not as strong, leading to higher gross profits for the fleet (EUR 23 million in 2017). The recent dip in 2017 is largely due to a fall in the exchange rate against the euro.

**UK SSCF economic performance**

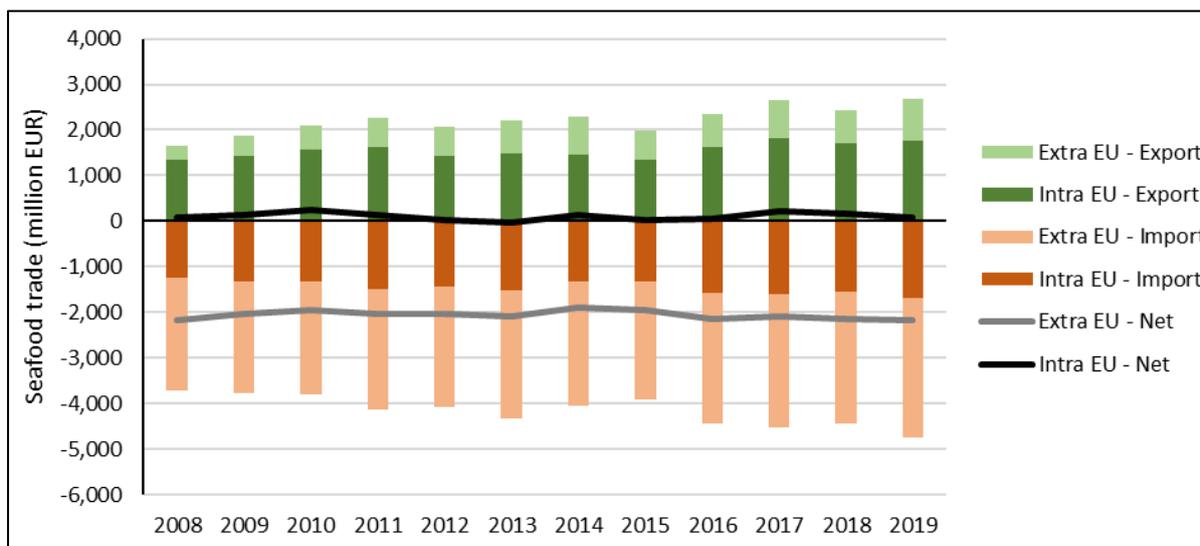


Source: Authors' calculations based on STECF, 2019. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

Much of the increase in economic performance is credited to the increase in fish prices in recent years, especially for shellfish. Other key drivers of economic performance include stock status and TACs, effort restrictions, fuel prices, and exchange rates affecting exports. National fisheries experts do not identify seafood imports as a significant issue for the Spanish fishing fleet (STECF, 2019).

While the UK's intra-EU fish trade is roughly balanced, it is a large net importer of seafood at the extra-EU level (EUR 1.9 billion in 2019). These trends have remained largely unchanged over the past decade.

**UK intra and extra EU seafood trade**



Source: Authors' calculations based on Eumofa, 2020a. Monetary values have been adjusted for inflation (2015 constant prices using Eurostat GDP deflator).

The largest extra-EU imports by value are cod (Iceland, Russia, Norway), tuna (Seychelles, Ghana, Ecuador, Mauritius, Philippines), shrimp (Viet Nam, India, Bangladesh, Honduras, Thailand), salmon (Faroe Islands, United States), haddock (Norway, Iceland) – the 'big five' species as they are known in the UK (Eumofa, 2020a).

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