Preparations for the post-2020 EMFF
Overall timeline – key steps

- Closely connected to the preparation of the next Multiannual Financial Framework (MFF)

- Impact Assessment – internal preparations are underway

  2 May: adoption of the MFF
  29 May: EMFF legislative proposal

- Legislative negotiations and adoption of legal framework

- 1 January 2021: Start of new programming period
Consultation activities

- EFF *ex-post* evaluation of the EFF (2007-2013)

- Tallinn Stakeholder Conference (October 2017)

- Targeted consultations (e.g. EMFF Expert Group, Advisory Councils, NGOs, social partners)

- Targeted workshops (e.g. European Association of Fisheries Economists conference held in April 2017 or European Maritime Days in May 2017)
EMFF 2014-2020 – key priorities

- Sustainable fisheries: 26.9% (1,545,795)
- Sustainable aquaculture: 21% (1,210,131)
- Implementing the CFP: 19.1% (1,100,000)
- Employment and territorial cohesion: 9% (518,954)
- Technical assistance: 5.1% (291,595)
- Implementation of the IMP: 1.2% (71,056)
- Marketing and processing: 17.6% (1,011,801)
EU fishing fleet – economic outlook

- EU fishing fleet in 2018: 82,866 vessels:
  - 74% of active vessels are small-scale coastal vessels, 25% large-scale and 1% distant-water vessels

- In 2015, the EU fleet landed 5 million tonnes of seafood with a reported landed value of €7.2 billion.

- The amount of Gross Value Added and Gross Profit (all excl. subsidies) generated by the EU fishing fleet (excl. Greece) was €3.9 billion and €1.6 billion, respectively.

- Net profits amounted to EUR 798 million (net profit margin – 11%) Revenue (income from landings plus other income) earned by the EU fishing fleet in 2015 (excl. Greece) was estimated at €7.27 billion.

- EMFF contribution – 9,600 fishing vessels benefited from the EMFF (49% of which belonged to the small-scale coastal fishing fleet).
In 2015, 4.6 million tonnes of the total were fished, while 1.3 million originated from farming activities.

Consumption in the EU market is dominated by wild products, representing three-fourths of the total. In 2015, 18.64 kg per capita of wild fish were consumed, while farmed products totalled 6.47 kg per capita.

In 2015, imports of both farmed and wild products decreased by 2% each since 2014. Exports of wild products fell by 12% (-226,000 tonnes).
Employment in the EU fisheries sector

- Direct employment generated by the sector: **152 700 fishermen** (corresponding to 114 863 FTEs)

- In 2016, the average annual wage per FTE was estimated at EUR 24.8 thousand, ranging from EUR 1.4 thousand in Cyprus to EUR 75 thousand in Belgium

- **EMFF contribution**: Has benefited more than 275 000 persons, as well as 2.7 million port users. 67% of all EMFF projects aim to enhance the competitiveness of SMEs and of the fisheries and aquaculture sectors
EMFF and support for the conservation of the marine environment

- 21.3% of all operations contribute to preserving and protecting the marine environment (20%) and promoting resource efficiency (1.3%)
  - total commitments of €670 million out of which €433 million EMFF

- EMFF has also supported better management of more than 60,000* km² of Natura 2000 areas, and almost 1.5 million km² of other marine protected areas.
State of play 2018

There has been progress:
  - more stocks than ever in MSY
  - greater profitability for the fleet
  - more positive outlook for the sector

But...
  - still pockets of overfishing
  - economic difficulties for parts of the sector
Increased number of sustainable fish stocks, leading to increased productivity
(Northeast Atlantic, North Sea & Baltic Sea)
Trends in economic performance and fishing mortality compared to the FMSY

Average Gross profit per vessel (Northeast Atlantic, North Sea & Baltic Sea)  
Ratio F/FMSY
Post 2020 challenges

- Challenges which require support and investment:
  - Full implementation of the landing obligation
  - Continued progress towards MSY
  - Innovation and technological progress of the sector
  - Social dimension of the sector including generational renewal, health & safety, security, training, etc.
  - Protection of the marine environment – ocean governance ambitions
  - Climate change
  - Unlocking the potential of the blue economy and the role of the maritime economy in coastal communities
Key issues for reflection

- **Policy objectives:** Achieving the objectives of the CFP, promoting the blue economy, strengthening international ocean governance

- **Regional solutions to tackle regional challenges:** Targeting support to specific seabasin challenges

- **Small-scale coastal fisheries:** Granting a preferential treatment to SSCF operators

- **Innovative forms of support:** Developing the potential of financial instruments

- **Simplification and results:** Moving from prescriptive measures to a result-oriented approach
Thank you for your attention!