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ABSTRACT

Commission Decision of 25 February 2016 setting up a Scientific, Technical and Economic Committee for Fisheries, C(2016) 1084, OJ C 74, 26.2.2016, p. 4–10. The Commission may consult the group on any matter relating to marine and fisheries biology, fishing gear technology, fisheries economics, fisheries governance, ecosystem effects of fisheries, aquaculture or similar disciplines. This report is the latest in a series of annual reports requested by the European Commission to analyse the balance between fleet capacity and fishing opportunities using a standard approach across all EU fleet segments, based on DCF information and in line with the Commission Guidelines (COM (2014) 545 final).

Communication from the Commission to the European Parliament and the Council.

Guidelines for the analysis of the balance between fishing capacity and fishing opportunities according to Art 22 of Regulation (EU) No 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy).

STECF REPORTS ON EWG 25-12 BALANCE CAPACITY

STECF PLENARY MEETING SPRING 2026 - UPDATE OF THE STECF EWG 25-12 REPORT TO REFLECT THE UPDATED GUIDELINES FOR THE ANALYSIS OF BALANCE OF THE FLEETS BELOW 12 M IN LENGTH IN THE OUTERMOST REGIONS (COM(2025)798 FINAL)

REQUEST TO THE STECF

STECF is requested to review the updated STECF EWG 25-12 report, which incorporates the results of three ad-hoc contracts carried out under the recently adopted guidelines for the analysis of balance for fleets below 12 m in the outermost regions (COM(2025) 798 final), and to provide a brief overview of the additional information and methodological updates introduced through this work.

STECF COMMENTS

STECF notes that the updated STECF EWG 25-12 report incorporates additional information and methodological updates from the three ad-hoc contracts concerning the calculation of the Stock at Risk (SAR) indicator, following the adoption of the new Commission guidelines for analysing fleet balance for vessels below 12 metres overall length in the outermost regions (OMRs) (COM(2025) 798 final).

STECF recalls that the SAR indicator was originally designed to identify how many biologically stocks at risk are significantly impacted by a given fleet segment in a specific year. As described in earlier STECF work (STECF EWG 13-28 and EWG 14-09) and Commission guidelines (COM(2014) 545 final), this biological indicator was identified to complement the Sustainable Harvest Indicator (SHI) and used in combination to assess whether vessels rely on overfished stocks or are involved in causing a high biological risk to a depleted stock.

Following the Commission guidelines COM(2014) 545 final, a “stock at risk” is defined as a stock: a) assessed as being below the Blim biological level; or, b) subject to an advice to close the fishery, to prohibit directed fisheries, to reduce the fishery to the lowest possible level, or similar advice from an international advisory body, even where such advice is given on a data-limited basis; or, c) subject to a fishing opportunities regulation which stipulates that the fish should be returned to the sea unharmed or that landings are prohibited; or d) a stock which is on the IUCN “red list” or is listed by Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES).

STECF recalls that the SAR indicator is calculated for each fleet segment (defined by the combination of Member State, fishing gear, and vessel length class) and that the methodology consists of two main steps: (1) identifying the stocks considered to be biologically at risk in a given year, based on the four criteria described above, and (2) determining which fleet segments exploit those stocks at risk to a significant extent.

Commission guidelines set out in COM(2014) 545 final include a fleet segment when either the stock at risk represented more than 10% of the catches of that fleet segment (“fleet threshold”), or the fleet segment accounted for more than 10% of the catches of that stock (“stock threshold”) (Table a).

STECF observes that, recognising the specific characteristics of small-scale fisheries in the outermost regions, the Commission introduced temporary flexibility through COM(2024) 223 final, allowing alternative threshold values for fleet segments consisting of vessels below 12 m in length. Under this temporary approach, a stock at risk was considered to be “exploited by” a fleet segment if the stock represented more than 20% of the catches of that fleet segment, or the fleet segment accounted for more than 10% of the catches from the stock (Table a).

STECF notes that, following the expiry of the temporary arrangement, COM(2025) 798 final introduced revised methodological guidance specifically tailored to fleet segments consisting of vessels below 12 m overall length operating in the outermost regions. Under the updated guidelines, a stock at risk is considered to be exploited by these fleet segments only when both of the following conditions are simultaneously met: the stock represents more than 20% of the landings of the fleet segment, and the fleet segment accounts for more than 10% of the total landings from that stock (Table 6.1.1). This modification replaces the previous “or” condition with a cumulative “and” condition. STECF observes that the updated (COM(2025) 798 final) guidelines introduce specific provisions for shared stocks exploited jointly with third countries. For stocks managed by RFMOs, the SAR calculation should rely on international catch or landings data whenever available. Where such information is not available, EU landings data may be used, complemented by any other relevant information. Furthermore, stocks that RFMOs classify as neither overfished nor subject to overfishing are not considered “stocks at risk” for the purposes of the SAR calculation, irrespective of whether any of the criteria for identifying stocks at risk are met.

STECF notes that the updated EWG 25-12 report incorporates international landings data where available. STECF notes that total international landings used by the three ad hoc contracts for the SAR calculation were used only for two stocks exploited by OMR fleets: blue marlin (*Makaira nigricans*) and acoupa weakfish (*Cynoscion acoupa*), based on RFMO information and updated data reported in the French fleet report submitted in 2025.

Table a. Overview of SAR calculation methods. The method in bold has been used to update the STECF 25-12 report.

Landings data	Fleet threshold	AND / OR	Stock threshold	Guidelines
STECF	10%	OR	10%	COM(2014) 545 final
STECF	20%	OR	10%	COM(2024) 223 final
STECF	20%	AND	10%	COM(2025) 798 final
STECF + total international landings provided in the French fleet report	20%	AND	10%	COM(2025) 798 final

Source: Own elaboration.

In line with these provisions, the updated EWG 25-12 report incorporates the SAR indicator recalculated for all relevant OMR fleet segments below 12 m using the revised methodology (Table a).

STECF notes that the revised criteria provided in the guidelines COM(2025) 798 final have a decisive influence on the outcome of the SAR indicator values, as both conditions (10% and 20 %) must now be satisfied simultaneously, resulting in a significant decrease in the number of fleet segments identified as impacting or depending on stocks at risk (Table b).

STECF observes that, in the updated report, for all ORs only a single fleet segment less than 12 m overall length (FRA-OFR-DFN-VL1012-GF-A which is operating in French Guiana) is identified as imbalanced according to the criteria for computing the SAR indicator in the 2025 guidelines COM(2025) 798 final including international catches.

STECF also notes that, when the indicator is computed using total EU landings rather than total international landings, three fleet segments (two in French Guiana and one in Martinique) are identified as imbalanced due to their interaction with one stock at risk (Table b).

By contrast, STECF further notes that when the criteria are applied separately (i.e. when either condition is sufficient, following COM(2014) 545 final or COM(2024) 223 final), the number of fleet segments indicated to be imbalanced is substantially greater, with approximately half of the fleet segments indicating imbalance with respect to the SAR indicator (Table b).

STECF notes that these methodological changes are a direct consequence of the revised Commission guidelines and have been transparently implemented in the updated EWG 25-12 report.

Table b. SAR indicator calculated according to the criteria listed in Table 6.1.1. The colours are in line with those used in traffic light tables (Red = one or more stocks at risk, Greens = no stocks at risk landed/caught by the fleet segment (-1) or Stock-at-risk landed but not reaching the corresponding thresholds (0)).

Member State	OMR	Fleet Segment	2023			
			COM(2014	COM(2024)	COM(2025)	COM(2025)
			INITIAL CALCULATION	20% THRESHOLD	DOUBLE CRITERIA	DOUBLE CRITERIA + INTL CATCHES
SPAIN	Canaria Islands	ESP-NAO-FPO-VL0010-IC--				
		ESP-NAO-FPO-VL1012-IC--	1	1	0	0
		ESP-NAO-HOK-VL0010-IC--	1	1	0	0
		ESP-NAO-HOK-VL1012-IC--	0	0	0	0
		ESP-NAO-PMP-VL0010-IC--	6	6	0	0
		ESP-NAO-PMP-VL1012-IC--	0	0	0	0
		ESP-NAO-PS-VL1012-IC--	2	1	0	0
France	French Guiana	FRA-OFR-DFN-VL0010-GF--A	4	4	1	0
		FRA-OFR-DFN-VL0010-GF--L	3	2	0	0
		FRA-OFR-DFN-VL1012-GF--A	4	4	1	1
		FRA-OFR-DFN-VL1012-GF--L	1	1	0	0
	Guadeloupe	FRA-OFR-DFN-VL0010-GP--A	1	1	0	0
		FRA-OFR-DFN-VL0010-GP--L	0	0	0	0
		FRA-OFR-DFN-VL1012-GP--L	-1	-1	-1	-1
		FRA-OFR-FPO-VL0010-GP--A	1	1	0	0
		FRA-OFR-FPO-VL0010-GP--L	0	0	0	0
		FRA-OFR-FPO-VL1012-GP--A	0	0	0	0
		FRA-OFR-FPO-VL1012-GP--L	0	0	0	0
		FRA-OFR-HOK-VL0010-GP--A	0	0	0	0
		FRA-OFR-HOK-VL0010-GP--L	0	0	0	0
		FRA-OFR-HOK-VL1012-GP--A	0	0	0	0
		FRA-OFR-HOK-VL1012-GP--L	0	0	0	0
		FRA-OFR-PGO-VL0010-GP--A	-1	-1	-1	-1
		FRA-OFR-PGO-VL0010-GP--L	-1	-1	-1	-1
		FRA-OFR-PGP-VL0010-GP--A	1	1	0	0
		FRA-OFR-PGP-VL0010-GP--L	0	0	0	0
		FRA-OFR-PGP-VL1012-GP--L	-1	-1	-1	-1
	Martinique	FRA-OFR-PS-VL0010-GP--A	0	0	0	0
		FRA-OFR-PS-VL0010-GP--L	0	0	0	0
		FRA-OFR-DFN-VL0010-MQ--	0	0	0	0
		FRA-OFR-FPO-VL0010-MQ--	0	0	0	0
		FRA-OFR-HOK-VL0010-MQ--	1	1	1	0
		FRA-OFR-HOK-VL1012-MQ--	1	1	0	0
		FRA-OFR-PGO-VL0010-MQ--	-1	-1	0	0
		FRA-OFR-PGP-VL0010-MQ--	1	1	0	0
	Saint Martin	FRA-OFR-PGP-VL1012-MQ--	1	1	0	0
		FRA-OFR-PS-VL0010-MQ--	1	0	0	0
		FRA-OFR-FPO-VL0010-MF--	-1	-1	-1	-1
		FRA-OFR-HOK-VL0010-MF--	0	0	0	0
	La Reunion	FRA-OFR-HOK-VL0010-RE--	1	1	0	0
		FRA-OFR-HOK-VL1012-RE--	1	0	0	0
		FRA-OFR-PGO-VL0010-RE--	0	0	0	0
		FRA-OFR-PGP-VL0010-RE--	-1	-1	-1	-1
	Mayotte	FRA-OFR-DFN-VL0010-YT--	0	0	0	0
		FRA-OFR-HOK-VL0010-YT--	1	1	0	0
		FRA-OFR-HOK-VL1012-YT--	0	0	0	0
		FRA-OFR-PGP-VL0010-YT--	0	0	0	0
Portugal	Madeira	PRT-NAO-HOK-VL1012-P2--	1	1	0	0
		PRT-NAO-MGP-VL0010-P2--	0	0	0	0
		PRT-NAO-HOK-VL0010-P2--	1	1	0	0
		PRT-NAO-HOK-VL1012-P3--	2	2	0	0
	Azores	PRT-NAO-HOK-VL1012-P3--	1	0	0	0
		PRT-NAO-PGP-VL0010-P3--	0	0	0	0
		PRT-NAO-PS-VL0010-P3--	0	0	0	0
		PRT-NAO-PS-VL1012-P3--	0	0	0	0
		PRT-NAO-DFN-VL0010-P3--	0	0	0	0

Source. Own elaboration based on the results of the ad hoc contract.

STECF CONCLUSIONS

STECF acknowledges the work performed under the ad hoc contracts to update the SAR indicator values for fleets less than 12 metres overall length in the ORs of France, Portugal and Spain.

STECF concludes that this work was completed in accordance with the 2025 Commission Guidelines (COM(2025) 798 final), and that the revised EWG 25-12 report includes SAR estimates consistent with these guidelines and incorporating the international landings provided in the 2025 French report. The results have been used to revise the relevant tables and associated text in the EWG 25-12 report.

STECF concludes that, according to the conditions and thresholds prescribed by the 2025 Commission Guidelines, only one out of 55 active fleet segments less than 12 m overall length in the ORs is indicated to be out of balance according to the SAR indicator.

STECF thus concludes that the revised methodology has significantly modified the perception of imbalance compared to previous assessment, as most segments previously assessed as out of balance are now considered in balance with regards to SAR.

STECF PLENARY MEETING NOVEMBER 2025

REQUEST TO STECF

STECF is requested to evaluate the findings of the STECF Expert Working Group meeting and make any appropriate comments and recommendations.

STECF COMMENTS

1. General comments

EWG 25-12 met 6-10 October 2025 in Ispra, Italy. The EWG was attended by 21 experts (including three STECF members), two JRC experts and one observer from the French fisheries administration.

The ToRs and the structure of the EWG report are similar to previous years. However, contrary to last year where two separate EWGs were conveyed, one concerning the mainland Europe and one for the Outermost regions (OMRs), the information for the two areas are presented separately in a single report.

In addition, STECF notes the following changes in the report from previous years:

1. The traffic light tables have been further modified to include two estimates of the SAR indicator (using the 10% and 20% threshold) for fleets comprising vessels less than 12 metres in length in the OMRs. The two estimates are included to illustrate any differences in the number of stocks at risk that contribute to the indicator and whether the balance status indicated is the same or different.
2. Where Member States have provided an alternative Vessel Utilisation Ratio indicator (VURnn) as permitted by the Commission's guidelines, the traffic light table shows

separate columns depicting the balance/out of balance status of fleet segments according to each indicator (VUR and VURnn).

3. Details of total vessels, inactive vessels and proportion inactive expressed in terms of number, tonnage (GT) and engine power (kW), have been included in the EWG report for the first time this year.
4. SAR threshold selection: the basis for including a stock at risk in the SAR indicator (10% of the stock or 10 % of the fleet segment landings) is given in a new table for fleet segments in the OMR section of the report. It also indicates the species flagged as 'at risk' and their relative importance expressed as a proportion of the total EU landings by the fleet segment.

STECF notes that the terms "in balance" and "out of balance" and analogous terms, are here used strictly in relation to the criteria given in the Commission guidelines (COM (2014) 545 Final and COM (2024) 223 FINAL). STECF further notes that according to the clarification given by the Commission in COM(2024) 223, for a given fleet segment, if any one of the indicator values prescribed in the CG indicates an imbalance, then this fleet segment is deemed by the Commission to be out of balance with fishing opportunities.

However, STECF notes that Member States' assessments regarding whether fleet segments are in or out of balance may not be solely based on the status of only one of the indicators specified in the guidelines. Additional information and/or analyses may be taken into account by Member States in assessing whether a segment is in or out of balance. However, the EWG does not have an objective framework to evaluate such information and comments only on whether the balance indicators provided in the Member States' fleet reports are based on DCF information in line with the Commission's guidelines. STECF agrees with the rationale of the EWG.

Comments on the inclusion of two SAR indicators for fleets comprising vessels less than 12 metres in length in the OMRs

STECF observes that the inclusion of two SAR indicators for vessels less than 12 metres in length is useful to illustrate any differences in the number of stocks at risk as a result of the different thresholds applied. STECF notes that adopting different thresholds (10% or 20% of the total landings from a stock) meant that out of 56 segments under 12 metres in the OMRs, the indicated balance status changed (from 'out of balance' to 'in balance') for one fleet segment only (FR OFR PSVL0010), for which the number of stocks at risk contributing to the indicator changed from 1 to 0. In all other under 12 metres fleet segments in the OMRs, the number of stocks at risk contributing to the indicator values remained the same.

Comments on inclusion of an alternative Vessel Utilisation Ratio

The inclusion of both the VUR and VURnn indicator values (if provided by Member States), facilitates an assessment of whether the indication of balance for a fleet segment using the Member States' preferred indicator (VURnn), is the same or different to that indicated by the VUR based on observed maximum sea days.

In the fleet reports submitted in 2025, only France provided values for VURnn, and the basis for the values for fleet segments in the French OMRs, differs from that for other regions. In the case of France, for the North Atlantic Ocean (NAO), Mediterranean and black Seas (MBS), other fishing regions (OFR), and two French outermost regions (Mayotte and Saint Martin) the 90th percentile of the distribution of days at sea per segment is used as the denominator (theoretical maximum sea days) in the vessel utility ratio, hence the indicator is

referred to as VUR_{90} . For the remaining French OMR regions, a different theoretical maximum is used for all fleet segments within a single OMR (Table A).

Table A. Theoretical maximum number of sea days (T.max) for French OMRs used by the Member State to compute VURnn.

OMR	T.max
French Guiana	123
Guadeloupe	122
Martinique	86
Reunion	121
Mayotte	90%*
Saint Martin	90%*

* 90% = the 90th percentile of the distribution of days at sea for each segment

Source: STECF PLEN 25-03 based on EWG 25-12 results.

Numbers of active fleet segments from the mainland and outermost regions of France indicated to be out of balance according to the VUR, VUR₉₀ and VURnn indicator values are compared in Table B.

Table B. Numbers of French active fleet segments indicated to be out of balance according to the VUR, VUR₉₀ and VURnn indicator values.

Mainland Fleet segments					
	VUR	VUR ₉₀ *			
NAO	32	24			
MBS	15	8			
OFR	0	0			
Outermost region's fleet segments					
	VUR	VUR ₉₀ *	VURnn	Delta +	Delta -
French Guiana	4		2	2	0
Guadeloupe	15		8	7	1
Martinique	6		8	1	3
Reunion	1		3	1	3
Mayotte	2	2			
Saint Martin	2	2			

*VUR₉₀ = The theoretical maximum sea days is based on the 90th percentile of the distribution of days at sea for each segment.

delta + = number of segments where VUR indicates 'out of balance' and VURnn indicates 'In balance'

delta - = number of segments where VUR indicates 'In balance' and VURnn indicates 'out of balance'

Source: STECF PLEN 25-03 elaboration based on EWG 25-12 report.

For the NAO, MBS and OFR French fleet segments, VUR₉₀ indicates fewer fleet segments to be out of balance than VUR (or equal for the two French OMR regions using this indicator). The reason for this observation is trivial; the 90th percentile of the maxseadays is lower than the observed maxseadays for each fleet segment and a lower denominator in a ratio will give a higher ratio for a given numerator.

For the French OMRs the situation is not quite so straightforward and varies by segment and OMR. Some segments which are indicated to be 'in balance' according to the VUR indicator are indicated to be 'out of balance' according to VURnn (delta -). The opposite is also true (delta +).

However, irrespective of how fleet segments are indicated either by the VUR, VUR₉₀ or the VURnn indicators, STECF has no objective basis to judge which indicator is the most informative in the assessment of whether a fleet segment is in or out of balance with fishing opportunities.

Comments on the use of international landings for the calculation of the SAR indicator

STECF notes that, in order to flag a stock at risk (SAR) for a fleet segment according to the guidelines, one of the following two criteria needs to be fulfilled:

i) The landings from a stock at risk by the fleet segment account for more than 10% of the total landings by the fleet.

or

ii) The landings from a stock at risk by the fleet segment account for more than 10% of the total catches from the stock at risk. The 10% threshold is increased to 20% for segments from the OMR that comprise vessels less than 12 metres in length.

STECF has previously concluded (PLEN 24-03) that the calculation of SAR using only EU landings for criterion ii) might be misleading, especially for fisheries in OMRs or in fishing areas with shared stocks. The 10% or 20% threshold in (ii) is a proxy for the amount of fishing mortality exerted by a fleet on a stock at risk relative to the total fishing mortality on the stock at risk. Hence to derive the appropriate value for the SAR indicator the landings by the fleet and the total international landings from the stock are required. On the other hand, STECF also observes that there is a risk that SAR indicator values are underestimated in certain regions as the OMRs and OFRs for which there are few stock assessments and management advice available, because criteria i and ii for selecting stocks at risk cannot be considered in the absence of relevant information.

STECF notes that during the data compilation EWG that takes place ahead of the Balance EWG, attempts were made to compute the SAR indicator using total international landings for stocks exploited by fleets in the OMRs. For a number of reasons relating primarily to sources of landings data and a lack of time, this could however not be completed by the EWG 25-12. Hence, the SAR indicator values in the EWG 25-12 report are still based only on total EU landings of the stocks at risk. STECF also notes that while the French fleet report contains SAR indicator values based on international landings from stocks deemed to be at risk, the number of stocks at risk considered by the French report to compute the SAR indicator is not the same as that used by the EWG 25-12. The outcome is that the SAR indicator values in the French fleet report and those computed by the EWG 25-12 are not directly comparable. STECF considers that if indicators are to be directly compared, there is a need to agree a common list of data sources for landings data and a common list of stocks at risk.

Comments on the provision of economic data at the clustered fleet segment level

STECF notes that in the majority of cases where Member States provide economic data at the clustered fleet segment level because of confidentiality issues, landings are also reported separately for each of the fleet segments that make up the cluster. However, in a minority of cases, the landings for the individual fleet segments are not reported separately. It is highly desirable that such cases are identified by the Member States in their data submission in

response to the fleet economic data call, so that the EWG can identify cases where the relevant landings' data are not available for separate fleet segments. The information required is described in section 2.3 of the EWG 25-12 report.

2. Summary of the outcomes of the EWG

On the request from DG MARE during the plenary week, STECF produced four summary tables compiling the results of the EWG; mainland fleet balance indicator values (Table C), OMR fleet balance indicator values (Table D); comments on whether the national fleet reports provided in the Member States' fleet reports are based on DCF information (Table E) and comparison table of indicator values (Table F). Finally, Table G provides an overview of action plans and was inserted from the EWG report.

Overview of the European mainland fleet and by region

Table C presents the number of segments for the EU mainland and in each supra region (North Atlantic Ocean, Mediterranean and Black Seas and Other Fishing Regions) and for each indicator (SHI, SAR, CR/BER, RoI / RoFTA, VUR and IV), the number of segments for which an indicator value could be computed for the year 2023. It also includes the numbers of segments that according to the criteria in the Commission's Guidelines, are indicated to be in balance or out of balance, together with an assessment of the trend of the indicators, as reported by EWG 25-12.

Compared to the result of EWG 24-13 referring to 2022 the number of active fleet segments decreased in 2023 in NAO and OFR, from 355 to 304 fleets and from 63 to 20 fleets respectively compared to 2022, while the number of active fleets remained unchanged in MBS (201).

The proportion of fleets for which a meaningful SHI could be calculated has decreased from 47% to 40% in the MBS and from 62% to 50% in OFR, while it remained stable in NAO at about 40 %. STECF further notes that out of the meaningful SHI indicated fleet segments, the proportion of fleet segments that were assessed to be in balance with fishing opportunities decreased from 80 % to 72% in NAO and from 45% to 43% in MBS, while it increased from 85 % to 100 % in OFR, compared to the results of EWG 24-13 referring to 2022.

As regards the SAR for mainland fleets, STECF observes that the number of segments for which a SAR indicator could be computed has increased from 72% to 75% in NAO and from 76% to 83% in MBS compared to the results of EWG 24-13. In OFR the proportion has remained similar changing from 76 % to 75% The proportion of SAR fleet segments that were assessed to be in balance with fishing opportunities increased from 49% to 60% in NAO and from 42% to 62% in MBS, while it decreased from 44% to 40% in OFR, compared to 2022.

The proportion of segments assessed to be in balance based on the economic indicators have decreased in NAO and OFR while remained closed to unchanged in MBS in comparison to 2022.

The technical indicator Vessel Utilisation Ratio (VUR) indicates that about 40% of the segments to be in balance in the NAO and MBS, which is a decrease from about 50% in 2022. As was also the case in 2022 in the OFR, almost all fleet segments are indicated to be in balance according to the VUR.

Table C. Summary table of balance indicator values for 2023 and trends over the period 2019-2023 at mainland EU and regional level (NAO, MBS and OFR). The number of fleet segments in balance, out of balance with improved, worsened and no trends are shown.

Area			N active segments	Indicators						
				Biological		Economic			Technical	
			Total	SHI	SAR	Cr/BER	RoFTA	RoI	VUR	IV
EU	Coverage	Total	525	216	409	338	338	67	463	27%
	Balance	In balance		135	245	166	179	21	203	
		Out of balance		81	164	172	159	46	260	
NAO	Coverage	Total	304	125	228	196	196	54	251	33%
	Balance	In balance		90	136	92	100	15	99	
		Out of balance		35	92	104	96	39	152	
	Trend	Deteriorating		13		70	81	21	10	
		Improving		44		54	75	10	24	
		No trend		54		33	1	0	188	
		Flat		0		0	0	0	5	
		Could not be calculated		14		39	39	23	24	
MBS	Coverage	Total	201	81	166	131	131	11	194	17%
	Balance	In balance		35	103	70	75	5	87	
		Out of balance		46	63	61	56	6	107	
	Trend	Deteriorating		1		59	67	9	19	
		Improving		43		37	47	1	12	
		No trend		19		18	0	0	114	
		Flat		5		0	0	0	14	
		Could not be calculated		13		17	17	1	34	
OFR	Coverage	Total	20	10	15	11	11	2	18	8%
	Balance	In balance		10	6	4	4	1	17	
		Out of balance		0	9	7	7	1	1	
	Trend	Deteriorating		0		2	3	0	2	
		Improving		2		3	4	2	2	
		No trend		5		3	1	0	10	
		Flat		0		0	0	0	0	
		Could not be calculated		3		3	3	0	4	

Source: STECF PLEN 25-03 elaboration based on EWG 25-12 report.

Overview of the outermost regions' fleet and by Member State

Table D. Summary table of balance indicator values for 2023 for the Outermost regions.

	Fleet segments (total)		SAR	SHI	VUR	VUR ₉₀	VUR _{nn}	Fleet segments (clustered)		Rofta	CR/BER
France	48	Assessed FS	46	35	47	4	42	23	Assessed FS	21	21
		Out of balance	13	4	30	4	21		Out of balance	8	8
	% out of balance		28	11	64	100	50	% out of balance		38	38
Portugal	18	Assessed FS	18	10	18			16	Assessed FS	16	16
		Out of balance	7	0	3				Out of balance	4	3
	% out of balance		39	0	17			% out of balance		25	19
Spain	11	Assessed FS	11	6	11			6	Assessed FS	6	6
		Out of balance	8	0	3				Out of balance	4	4
	% out of balance		73	0	27			% out of balance		67	67
Total	77	Assessed FS	75	51	76	4	42	45	Assessed FS	43	43
		Out of balance	28	4	36	4	21		Out of balance	16	15
	% out of balance		37	8	47	100	50	% out of balance		37	35

Source: STECF PLEN 25-03 elaboration based on EWG 25-12 report.

STECF acknowledges that the report provides an extensive assessment of fishing fleet capacity, activity, and balance between fishing opportunities and effort across the outermost regions of France, Portugal, and Spain. It analyses vessel numbers, tonnage, engine power, and levels of inactivity, and evaluates biological, economic, and technical indicators for each fleet segment.

For the French outermost regions, STECF notes that most segments in Guadeloupe, Martinique, La Réunion and Mayotte were generally indicated to be in balance according to the biological indicators, although for French Guiana several segments were indicated to be out of balance. While many segments displayed favourable economic outcomes, in French Guiana and Guadeloupe the economic indicators for some segments were less favourable. VUR_{nn} indicator pointed to the majority of segments to be out of balance.

STECF observes that the EWG 25-12 report highlights increased data availability, allowing broader use of biological indicators, and notes varying alignment between Member State and expert-group calculations. In its fleet report, France identifies several segments as structurally imbalanced and proposes an action plan targeting capacity limits, restrictions on new entrants, and additional management measures, especially in French Guiana and Guadeloupe.

In Portugal's outermost regions, STECF notes that in general, fleets from Madeira and the Azores fleets are indicated to be in balance, although some segments in both regions exploit species at risk. Economic indicator values results were largely positive, with only a minority of segments showing low profitability. Technical indicators suggested most segments were in balance. STECF observes some discrepancies between national and expert-group calculations, partly due to differences in stock assessments and effort data. Portugal presents an action plan for two Madeiran segments involving permanent vessel cessation, while the Azores are considered not to require any adjustment measures.

For Spain's Canary Islands, STECF notes that the SHI indicator placed all assessable segments in balance, but the SAR indicator showed that most segments depended on stocks at risk. Economic indicators suggest that the majority of fleet segments are profitable, although some segments showed deteriorating trends in profitability over the most recent three years. Technical indicators values indicate imbalance in three out of 11 fleet segments.

Spain regards several segments as structurally imbalanced and stresses limitations of current guidelines for assessing small, multispecies fleets.

Summary of the alignment of the Member States fleet reports with the CG

STECF considers that 10 out of 22 Member States provided balance indicators that were based on DCF information in line with the Commissions guidelines. The other 12 Member States followed the guidelines to a varying degree (reported as “No” in table E below).

Table E. Summary of the EWG remarks as to whether the balance indicators provided in the Member States’ fleet reports are based on DCF information fully in line with the Commission’s guidelines (CG).

Member State	In line with the CGs (2025)	EWG comments
Belgium	Yes	–
Bulgaria	Yes	–
Croatia	Yes	-
Cyprus	No	Not all the indicators are provided for all fleets
Denmark	Yes	–
Estonia	No	Some indicators are provided in a different segmentation (for 2 segments <12m) from that reported to DCF.
Finland	No	None of the economic or technical indicators requested were presented in the fleet report.
France	No	Improvements have been made but not all segments are in line with DCF.
Germany	Yes	–
Greece	No	Does not provide an assessment of balance between fleet capacity and fishing opportunities for all fleet segments in accordance with the Commission guidelines
Ireland	No	MS has used values for the biological indicators taken from the previous year’s balance report (in this case EWG 24-13 report).
Italy	No	Not all the indicators are provided; some for a different segmentation or different years
Latvia	No	One indicator (SAR) is missing
Lithuania	Yes	–
Malta	No	Biological indicators not provided
Netherlands	Yes	–
Poland	Yes	–
Portugal	No	Improvements have been made but MS’s values for all indicators differ from those calculated by the EWG 15-12.
Romania	Yes	–
Slovenia	No	Not all the indicators are provided for all segments
Spain	Yes	–
Sweden	No	EWG 24-13 and EWG 25-12 noticed that the fleet segments are not identified in accordance with the fleet classification specified in the fleet economic data call under the DCF.
Total	10	

Source: STECF PLEN 25-03 elaboration based on EWG 25-12 report.

Summary of the discrepancies between Member States' fleet reports and those calculated by the EWG

In Table F below each fleet segment, the biological, economic and technical indicator values that were computed by the EWG were compared with the equivalent values and trends in the fleet reports submitted by the Member State under Article 22.2 and 22.3 of Regulation (EU) 1380/2013. Discrepancies between such values were highlighted and where possible the reasons for such discrepancies were identified.

A summary of the differences found in the indicator values between Member States' fleet reports and those calculated by the EWG is presented in Table F. The categorisation of these differences is based on the following criteria decided by STECF in the PLEN 22-03 report:

- **Similar (Sim).** If the indicator values calculated by the EWG and those provided by the Member States are the same or slightly different, but they indicate the same balance/imbalance assessment.
- **Discrepancies (Discr).** If the indicator value calculated by the EWG and those provided by the Member States differ and they indicate a different balance/imbalance assessment.
- **Not Provided (NP):** If the indicator value is not provided in the Member State's fleet report.
- **Not Comparable (NC):** If the fleet segmentation used by the Member State differs from the one used by the EWG; and/or if the indicator provided is not that computed by the EWG.
- **Not Undertaken (NU):** There were issues relating to data concerning inactive vessels and especially regarding the calculation of inactive GT and kW, which meant that comparisons between the EWG estimates and those provided by Member States in their fleet reports could not be undertaken

Table F. Differences in the indicator values between Member States' fleet reports and those calculated by the EWG.

	Biological		Economic			Technical		EWG comments
MS	SHI	SAR	CR/BER	RoI	RofTA	VUR	IV	
Belgium	Sim	Discr	Sim	NU	Sim	Discr	NU	SAR discrepancies in three fleet segments. VUR discrepancies for one fleet segment.
Bulgaria	Discr	Sim	Discr	NU	Sim	NC	NU	SHI different because MS did not follow the calculation method set out in the Guidelines. CR/BER differences due to different clustering.
Croatia	Discr	Discr	Discr	NU	Discr	Discr	NU	SHI and SAR different number of fleet segments and evaluation of balance. CR/BER discrepancies for 1 fleet segment. RofTA and VUR differences for 2 fleet segments.
Cyprus	Sim	Discr	Discr	NU	Discr	NC	NU	Different SAR list. CR/BER and RofTA different number of fleet segments and 1 with different assessment of balance.

Denmark	Discr	Discr	Discr	Discr	NU	Discr	NU	SHI differences for 5 fleet segments. SAR differences for 11 fleet segments. CR/BER and ROI differences in the status of balance. For 11 fleet segments no VUR data provided in the MS report.
Estonia	NC	NC	Sim	Discr	NP	NC	NU	ROI different segmentation.
Finland	Discr	NP	NP	NP	NP	NP	NU	SHI calculated in different way.
France	Discr	Discr	Sim	NU	Sim	Sim	NU	SHI discrepancies for few fleet segments due to the use of different stock assessments. MS used a subset of the SAR stock list.
Germany	NC	Discr	Sim	NU	Sim	Discr	NU	SAR discrepancies in one fleet segment. VUR discrepancies for five fleet segments. No VUR values for five fleet segments in the fleet report.
Greece	NC	NP	NP	NP	Discr	NC	NU	RofTA discrepancy for 1 fleet segment.
Ireland	NC	NC	Discr	NP	Discr	Discr	NU	CR/BER and RofTA discrepancies due to different input data. VUR discrepancy for 1 fleet segment.
Italy	NC	NC	NC	NP	NC	NC	NU	SHI and SAR segmentation by GSA.
Latvia	Discr	NP	Discr	NC	NP	Discr	NU	SHI in the MS report 2 fleet segments missing. CR/BER 2 fleets with differences in the status of balance. VUR with 1 fleet with differences in the status of balance.
Lithuania	Sim	Sim	Discr	Discr	Discr	Discr	NU	CR/BER and VUR with differences in the status of balance.
Malta	NP	NP	Discr	NC	NC	Sim	NU	CR/BER with differences in the status of balance.
Netherlands	Sim	Discr	Sim	Sim	Sim	Sim	NU	SAR 3 fleets with differences in the status of balance.
Poland	Discr	Discr	Discr	Sim	Sim	NU	NU	SHI discrepancy for 1 fleet. SAR and CR/BER discrepancies for 2 fleets.
Portugal	Sim	Discr	Discr	NP	Discr	Discr	NU	No SAR found by the Member State, while 9 found by the EWG. CR/BER discrepancies for 3 fleets. RofTA discrepancies in the calculation and status. VUR discrepancies in the balance status.
Romania	NC	Sim	NC	NC	NP	Discr	NU	VUR discrepancies due to different calculation.
Slovenia	Sim	Discr	Discr	Sim	Sim	Discr	NU	SAR, CR/BER and VUR discrepancies due to different balance status.

Spain	Discr	Discr	Discr	NP	Discr	Discr	NU	SHI and SAR discrepancies due to different balance status. CR/BER and RofTA discrepancies for 1 fleet segment. VUR discrepancies for few fleets balance status.
Sweden	NC	NC	Discr	NP	Sim	Sim	NU	CR/BER discrepancies for 1 fleet segment for balance status.

Source: STECF PLEN 25-03 elaboration based on EWG 25-12 report.

Summary of the current status of Action Plans as reported in 2025 with those submitted or ongoing in 2024

Table G summarises for each Member State, the current status of Action Plans submitted with the fleet reports submitted in 2025 in relation to Action Plans already included or identified as on-going in the fleet reports submitted in 2024.

STECF notes that, Belgium, Estonia, Finland, Greece, Ireland Latvia, the Netherlands and Sweden did not present an action plan in 2025.

Table G. Summary for each Member State, the current status of Action Plans submitted with the fleet reports submitted in 2025 in relation to Action Plans already included or identified as on-going in the fleet reports submitted in 2024.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Belgium	2024	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Belgium	2025	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Bulgaria	2024	yes	update	No	No	No	The provided action plan is not based on the MS's overall assessment in fleet report and comparison of technical, economic and biological indicators for 2018-2022. The explanation provided about the planned measures is general and does not give enough information about specific MS actions to balance fleet capacity.
Bulgaria	2025	yes	update	No	Yes	No	The updated action plan provides a list of measures aiming at improving the balance of the Bulgarian fleet. The measures were added to the AP related to the EMFAF activities and does not have a link to the segments considered out of balance in the MS Fleet report. It is unclear how the proposed measures will improve the balance of the fleet.
Cyprus	2024	yes	Update	yes	yes	yes	Updated from 2023. Nevertheless, the time frame target for permanent cessation has been shifted from 2023 to 2024, due to delays in the preparation of the methodology to be used for compensating the owners for the permanent cessation. The related time frames for replacing the diamond meshed trawl net at the cod end, and for closing an area for trawling, have been moved from 2024 to 2025. The MS identified the concern regarding one fleet segment.
Cyprus	2025	yes	Update	yes	yes	yes	Updated from 2024. Nevertheless, the time frame target for permanent cessation has been shifted from 2024 to 2025, due to delays in the preparation of the methodology to be used for compensating the owners for the permanent cessation. The related time frames for replacing the diamond meshed trawl net at the cod end, and for closing an area for trawling, have been moved from 2025 to 2026.
Croatia	2024	yes	Continuation	yes	yes	yes	MS will continue to implement the actions prescribed in the 2023 action plan concerning the imbalance fleet segments. The actions are based on temporary and permanent cessations and completed with supplementary measures. The timeframe and targets are also defined for main actions.
Croatia	2025	yes	Continuation	yes	yes	yes	MS will continue to implement the actions prescribed in the 2023 action plan concerning the imbalance fleet segments. The actions are based on temporary and permanent cessations and completed with supplementary measures. The timeframe and targets are also defined for main actions.
Denmark	2024	yes	update	no	no	no	No new action plan with with a clear timeframe or targeted to specific imbalanced fleet segments was proposed. Only very general measures are included.
Denmark	2025	yes	update	yes	yes	no	No new action plan with with a clear timeframe or targeted to specific imbalanced fleet segments was proposed. Note was made of a fishery improvement plan carried out in 2024 with the objective to improve the Danish coastal fleet. No new action plan was deemed to be required.
Estonia	2024	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Estonia	2025	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Finland	2024	no	/	/	/	/	No action plan proposed by MS. The MS considers its fishing fleet to be in balance with fishing opportunities, with no identified structural overcapacity.
Finland	2025	no	/	/	/	/	No action plan proposed by MS. The MS considers its fishing fleet to be in balance with fishing opportunities, with no identified structural overcapacity.
France	2024	yes	update	yes	yes	yes	The AP was updated with 4 new segments. The actions for these segments do not relate to fleet capacity reduction. The plan contains a wide range of general as well as more-specific measures for imbalanced fleet segments. Objectives are clearly described.
France	2025	yes	update	yes	No	yes	The AP was updated including new imbalanced segments (Area 27 and Other regions), segments assessed to be in balance were removed. The plan contains a wide range of general as well as more-specific measures for imbalanced fleet segments. Objectives are clearly described but the timeframe and targets are not clear.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Germany	2024	yes	Update	yes	yes	yes	Updated from 2023. The AP includes a range of general measures (i.e., shifting relevant fishing opportunities to coastal fisheries, marketing support, suspension of fishing to protect cod stocks in the western Baltic Sea, suspension of fishing to protect herring stocks in the western Baltic Sea, and permanent cessation of fishing activities targeting cod and herring in the western Baltic), applicable to seven fleet segments for which problems have been identified.
Germany	2025	yes	Update	yes	yes	yes	Updated from 2024. The AP addresses structural imbalances mainly in small-scale coastal fisheries in the Baltic Sea and shrimp fisheries in the North Sea. To restore economic and biological balance, Germany intends to decommission up to one-third of its shrimp fleet from 2025, using public funding. The targets and tools are defined clearly and are the same as those described in the report submitted in 2023. The timeframe for implementation (starting and ending years) is described by fleet segment and measure.
Greece	2024	no	/	/	/	/	MS considers that certain fleet segments are not in balance with their fishing opportunities. An Action plan is in preparation but was not submitted with the annual fleet report. It is proposed to complete the action plan by the end of 2024
Greece	2025	no	/	/	/	/	No action plan proposed by the MS, justifications are provided in the fleet report
Ireland	2024	No	/	/	/	/	Based on the available information, Ireland considers that structural imbalance does not exist in with the fleet and no action plan is proposed.
Ireland	2025	No	/	/	/	/	Based on the available information, Ireland considers that structural imbalance does not generally exist with the fleet and no action plan is proposed.
Italy	2024	Yes	Update with some new actions added	Fleet segments provided by GSAs	Mostly	Mostly	The action plan (AP) presented in this year's fleet report is a revised version of last year's action plan. Specific tools for a reduction in fishing pressure have been adjusted, the MS presents a table with the scrapping targets per GSA by segment (period 2021-2027). The measures in the action plan presented by the MS are mostly GSA-specific. In the scrapping plan, the minimum tonnage to be withdrawn is provided by fleet segment per GSA, however, the number of vessels affected cannot be determined
Italy	2025	Yes	Update with some new actions added	Fleet segments provided by GSAs	Mostly	Mostly	The action plan (AP) presented in this year's fleet report is a revised version of last year's action plan. Specific tools for a reduction in fishing pressure have been adjusted, the MS presents a table with the scrapping targets per GSA by segment (period 2021-2027). The measures in the action plan presented by the MS are mostly GSA-specific. In the scrapping plan, the minimum tonnage to be withdrawn is provided by fleet segment per GSA, and the number of vessels affected is reported.
Latvia	2024	No	/	/	/	/	MS stated that the measures to balance the fleet segment VL2440, included in Annex VII of the Annual Report on the Latvian Fishing Fleet 2022, are in the implementation phase and the effect of the reduction of the segment should be evaluated in the following years.
Latvia	2025	No	/	/	/	/	MS stated that the measures to balance fleet segment VL2440, included in Annex VII of the Annual Report on the Latvian Fishing Fleet 2022, are in the implementation phase and the effect of the reduction of the segment should be evaluated in the following years.
Lithuania	2024	Yes	New	Yes	Yes	Yes	The AP foreseen 4 vessels of the NAO DTS VL2440 fleet segment would be withdrawn in 2024 with public compensation for permanent cessation, resulting in a 40% reduction in the fleet segment's total tonnage and a 42% decrease in power. The Lithuania Programme for the European Maritime Fisheries and Aquaculture Fund 2021–2027 aims, by the end of 2029, to withdraw vessel capacity expressed in gross tonnage (GT) of 468.00 and kW of 884.00 in terms of power.
Lithuania	2025	Yes	Update	Yes	Yes	Yes	The targets from the previous AP were partially achieved, the updated AP aims to continue the capacity reduction targeting the removal of one vessel in another fleet segment (NAO TM VL2440) using public compensation.
Malta	2024	yes	new	no	yes	Yes	The proposed action plan is largely a statement of intent to improve monitoring activities. Some measures have been specified such as equipping vessels with a tablet (to transmit catches electronically), a sampling plan for lampara), obliging all vessels to be equipped with VMS or GPRS tracking devices, prohibition of fishing in certain bays from middle of february to middle of july, etc.).
Malta	2025	yes	new/updated	no	yes (2024-onward)	yes	The proposed action plan is largely a statement of intent to improve monitoring activities. Some measures have been specified such as equipping vessels with a tablet (to transmit catches electronically), FIS (Fisheries Information System) for improving the data collection, a sampling plan for lampara), obliging all vessels to be equipped with VMS or GPRS tracking devices, prohibition of fishing in certain bays from middle of february to middle of july, etc.). Also proposed to utilize the activity level indicator to clarify the segments that are economically profitable or improving.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Netherlands	2024	No	/	/	/	/	The rationale given for not including any action plan is given as follows: "The consequences of the North Sea sole stock benchmark and the ongoing negotiations between the Coastal States on the pelagic stock management."
Netherlands	2025	No	/	/	/	/	No rationale for not presenting AP is given in the fleet report.
Poland	2024	yes	Update	yes	yes	yes	Updated from 2023. The AP clearly specifies the targets and tools. However, no specific implementation date was indicated, only that the plan is to be implemented over the 3-5 year period 2023-2027. The MS identified the concern regarding seven fleet segments operating in the Baltic Sea. The EWG 24-13 is unable to assess the extent to which the measures in the action plan are likely to redress the imbalance in the fleet segments concerned.
Poland	2025	yes	Update	yes	yes	yes	Updated from 2024. The revised AP identifies structural overcapacity in seven fishing fleet segments. It focuses on reducing the number of vessels in segments deemed permanently inefficient or economically imbalanced, optimising the distribution of fishing rights to support biological sustainability, and improving data collection and modelling to enhance long-term balance assessments. The implementation period remains unchanged, covering 2023-2027. EWG 25-12 notes that although the plan is coherent and clearly structured, it lacks specific implementation dates beyond the general three to five-year timeframe. Moreover, EWG notes some inconsistencies regarding the action on permanently withdrawn vessels from segments VL1218TM, VL1824TM and VL2440TM, for which such actions were not considered in the action plan.
Portugal	2024	yes	Update	yes	yes	yes	Action Plan from 2022 and extended to the end of 2025 which provides permanent cessation of activity of 16 vessels from the fleet HOK >12m. The AP is strengthened by temporary cessation measure in 2023 for 40 vessels from the same fleet. The AP is clear, targeted and limited in time.
Portugal	2025	yes	Continuation	yes	yes	yes	An ongoing Action Plan from 2022, extended to the end of 2025, is in place. The AP foresees the permanent cessation of activity of 18 vessels from the fleet HOK >12 m (VL1218 - 14 vessels, VL1824 - 3 vessels and VL2440 -1 vessel) and a temporary cessation measure, which in 2024 is expected to
Romania	2024	yes	update	no	no	no	The action plan is largely a statement of intent to improve monitoring activities. The action plan proposed the previous year is still ongoing and ends in 2027. The action plan does not specifically target any fleet segments
Romania	2025	yes	update	no	no		The current Action plan proposes economic and technical measures for the fisheries sector in general and does not indicate any measures specific to fleet segments found to be out of balance. These measures are broad-
Slovenia	2024	No	/	/	/	/	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving a sustainable balance between fishing capacity and fishing opportunities. MS considers that all segments of Slovenian fleet are in balance and did not present an action plan.
Slovenia	2025	Yes	new/updated	yes	yes(2025-2029)	no	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving a sustainable balance between fishing capacity and fishing opportunities. MS continues to implement the existing National Management Plans, regulations and measures for small pelagic and demersal stocks. MS considers that all segments of Slovenian fleet are in balance and adopted a new Multiannual management plan was adopted (Recommendation GFCM/44/2021/20 on a multiannual management plan for the sustainable exploitation of small pelagic stocks in the Adriatic Sea (geographical subareas 17 and 18)). The plan will be implemented from 2025 to 2029, after the end of the transitional fishing regime that was prolonged until 2024. Vessels actively fishing for anchovy and sardine stocks are subject of the management measures of this plan
Spain	2023	Yes	New	Yes	Yes	Yes	New AP. The objectives are clearly defined and the measures to achieve them are described. The objectives are appropriately targeted to the fleet segments which are out of balance.
Spain	2024	Yes	Update	Yes	Yes	Yes	Updated from 2023, with some new measures, targets and tools for some segments. The objectives are clearly defined and the measures to achieve them are described.
Sweden	2024	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Sweden	2025	no	NA	NA	NA	NA	No new action plan or update has been presented.

Source: EWG 25-12 report.

STECF CONCLUSIONS

STECF concludes that given the available data and information, the EWG 25-12 answered the ToRs provided by the Commission.

STECF concludes that further effort is necessary to ensure that where possible, the SAR indicator is computed using total international landings from a stock rather than total EU landings as is currently the case.

Regarding the utility of the vessel utility ratios VUR and VURnn, STECF concludes that there is no objective scientific basis to judge which of such indicators is more informative in assessing whether a fleet segment is in or out of balance with fishing opportunities.

STECF notes that in cases where Member States, because of confidentiality issues, provide data on landings at the cluster level only, it is highly desirable that such cases are identified in the data submission in response to the fleet economic data call, so that cases where the relevant landings' data are not available for separate fleet segments can be readily identified. STECF therefore concludes that the following are specified in future fleet economic data calls:

- Regarding confidentiality issues:
country/supra region /fishing tech /vessel length /geo indicator /activity / year /data provided (True or False).
- Regarding clustering:
country/supra region /fishing tech /vessel_length /geo indicator /activity / year / fs_name

STECF concludes that there are no objective scientific criteria to assess whether the analysis of balance between fleet capacity and fishing opportunities in the fleet reports submitted by Member States is in accordance with the Commission's Guidelines. STECF concludes that this is a value judgement that needs to be based on multiple criteria which lay outside the scope of a scientific body.

Finally, if summary Tables C-F are needed in the future, STECF suggests that a future EWG on Balance Capacity prepare them instead of addressing this during the STECF plenary. The Commission should include this request in the EWG's ToRs.

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¹ - Information on STECF members' affiliations is displayed for information only. In any case, Members of the STECF shall act independently. In the context of the STECF work, the committee members do not represent the institutions/bodies they are affiliated to in their daily jobs.

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REPORT TO THE STECF

Balance Capacity (EWG-25-12)

06-10. October 2025

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

INTRODUCTION

The STECF Expert Working Group EWG 25-12 met during 6-10 October 2025 in Ispra, Italy. The meeting opened at 09:30 on 6 October and was adjourned at 16:30 on 10 October 2025.

1.1 Terms of Reference for EWG-25-12

The Commission requests that an analysis of balance between fleet capacity and fishing opportunity be made using a standard approach across all EU fleet segments, based on DCF information and in line with the Commission Guidelines COM(2014) 545 final¹ and COM(2024) 223 final^{2,3}. Where possible, evaluation should use data reference years 2011 to 2024.

An Expert group of the STECF (Chair, Dr. John Casey), EWG 25-12, will be convened from 6 to 10 October 2025 to undertake the following tasks and report to the STECF.

The STECF EWG is requested to:

Based on the data submitted by Member States under the 2025 DCF Economic data call and the most recent assessments and advice from relevant scientific bodies on stock status and their exploitation rates, compute values for the technical, economic and biological indicators specified in the European Commission Guidelines.

JRC will provide tabulated values (in the same format as the Member State indicator tables in the STECF 16-09 data table for all indicators as detailed in items i) to vi) below, covering all Member State fleet segments wherever the necessary data are available.

Values for the following indicators to be provided as specified in the 2014 and 2024 Balance Indicator Guidelines:

- (i) Sustainable harvest indicator (SHI)
- (ii) Stocks at risk indicator (SAR)
- (iii) Return on investment (ROI) and/or Return on Fixed Tangible Assets (RoFTA)
- (iv) Ratio between current revenue and break-even revenue (CR/BER)
- (v) The inactive fleet indicators
- (vi) The vessel use indicator

¹ COM (2014) 545 final. Communication from the Commission to the European Parliament and the Council. Guidelines for the analysis of the balance between fishing capacity and fishing opportunities according to Art 22 of Regulation (EU) No 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy.

² COM(2024) 223 final. Communication from the Commission to the European Parliament and the Council. Guidelines for the analysis of the balance between fishing capacity and fishing opportunities according to Art 22 of Regulation (EU) No 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy.

³ These guidelines have expired. If the Commission adopts new guidelines, the above reference to the 2024 guidelines should be read as referring to the new ones.

For fleet segments for which the indicator values can be calculated, the Expert group is requested to present the trend over the last 5/6-year period.

Provide country chapters containing the following information for each Member State, in order to allow the STECF to issue an informed advice both as regard the balance situation of the fleet segments and concerning the quality of the assessment provided by the Member States in their national fleet reports and, where relevant, action plans:

- a) Based on the biological, economic or technical indicator values and their recent trends as computed under task 1, provide an overview of whether, according to the Commission Guidelines fleet segments can be considered in or out of balance with their fishing opportunities.
- b) For each fleet segment, compare the biological, economic or technical indicator values as computed under task 1 with the equivalent values and trends in the fleet reports submitted by the Member State under Article 22.2 and 22.3 of Regulation (EU) 1380/2013. Highlight any discrepancies between the Member State's assessment of balance between capacity and fishing opportunities and the Expert group's assessment based on the indicator values computed under task 1. Where possible, identify the reasons for such discrepancies.
- c) Assess whether the analysis of balance between fleet capacity and fishing opportunities in the fleet report submitted by the Member State in 2025 under Article 22.2 and 22.3 of Regulation (EU) 1380/2013 is based on DCF information in accordance with the Commission's Guidelines COM(2014) 545 final and COM(2024) 223 final⁴.
- d) Evaluate whether any discrepancies between the STECF assessment of the balance between capacity and fishing opportunities relating to the Member States's previous fleet report have been appropriately addressed in the fleet report submitted in 2025.
- e) Advise as to whether the report identifies structural overcapacity and estimates the long-term profitability by fleet segment.
- f) Advise on whether the new or revised action plans submitted with the fleet reports in 2025 set out the adjustment targets and tools to achieve a balance and a clear timeframe for its implementation.
- g) Identify the number of vessels targeted by each action plan.
- h) Provide a summary overview of the action plans (AP) currently implemented by each Member State. The overview should include the year each AP was launched, if it is a renewal or a new one and identify the changes between the current AP and its previous version. The number of fleet segments and their respective vessels concerned should be identified.

The Expert group is requested to list for the Outermost Regions of France (Reunion, French Guiana, Martinique, Guadeloupe, Saint-Martin and Mayotte), Portugal (Madeira and Azores) and Spain (Canary Islands), those fleet segments that according to the most recent set of data (2020 or later if available) for either the biological, economic or technical indicators in the Commission Guidelines 2014 and 2024, as computed by the STECF, were indicated to be out of balance with their fishing opportunities. The list should contain information on the fish stocks on which such segments rely and the fishing

⁴ These guidelines have expired. If the Commission adopts new guidelines, the above reference to the 2024 guidelines should be read as referring to the new ones.

area to which such segments are attributed. Separate lists should be provided for each indicator. The fish stocks on which a fleet segment is reliant shall be determined by ranking the landings from all stocks caught by that fleet segment in descending order in terms of landings value and listing those stocks that account for at least 75% of the total value of the landings by that fleet segment. The Expert group is furthermore requested to provide a list of the fleet segments for which information available does not allow to calculate the above indicators and to indicate for which indicators what kind of information was not available.

For each Member State, the Expert group is requested to list in the Annex to its report those fleet segments that according to the most updated set of data (2020 or later if available) for either i) the SHI or ii) the SAR, as computed by the STECF, were indicated to be out of balance with their fishing opportunities together with the fish stocks on which such segments rely and the fishing area to which such segments are attributed. Separate lists should be provided for each indicator. The fish stocks on which a fleet segment is reliant shall be determined by ranking the landings from all stocks caught by that fleet segment in descending order in terms of landings value and listing those stocks that account for at least 75% of the total value of the landings by that fleet segment. The area to which a fleet segment is attributed shall be given as FAO area 27, FAO area 37 and for other fishing regions (OFR).

2. GENERAL CONSIDERATIONS REGARDING THE ASSESSMENT OF ‘BALANCE’

In previous reports, the Expert Group has discussed at length and provided a detailed critique of the application and utility of the indicators and criteria specified in the 2014 Commission guidelines (COM (2014) 545 FINAL) for assessing the balance between capacity and fishing opportunities⁵. Furthermore, numerous suggestions for modification and improvement have also been provided in previous reports.

In 2024, the Commission issued additional Guidelines (COM (2024) 223 FINAL) for fleet segments in the Outermost regions of France, Portugal and Spain comprising vessels less than 10m overall length. In 2025, these temporary Guidelines were replaced with the 2025 Guidelines COM (2025) 798 final for fleet segments in the Outermost regions of France, Portugal and Spain comprising vessels less than 12m overall length.

Criticisms and suggestions provided by the Expert Group and endorsed by the STECF and remain valid and apply to both the 2014 and 2024 Commission Guidelines.

In this report, the terms “in balance” and “out of balance” and analogous terms, are used strictly in relation to the criteria given in the Commission guidelines (COM (2014) 545 Final, COM (2024) 223 FINAL and, following an update of the report, COM (2025) 798 FINAL). Such terms are used to describe a favourable (in balance) or unfavourable (out of balance) situation based on the value computed for specific indicators in relation to the threshold specified for such indicators. The term “imbalanced” is also used and is synonymous with “out of balance”. Note that for a given fleet segment, if any one of the indicator values prescribed in the Commission Guidelines indicates an imbalance, then that fleet segment is deemed by the Commission to be out of balance with fishing opportunities.

2.1 Data availability and the sustainable harvest indicator (SHI) and stocks at risk indicator (SAR)

The Expert group notes that in reporting indicator values for the SHI and SAR in their annual fleet reports, some Member States use the indicator values computed by the STECF in the year prior to the year the fleet report is submitted. In a number of cases, the fleet report submitted by 31 May 2025, presents the SHI and SAR indicator values computed by Expert Working Group 24-13, which may or may not be based on data up to and including 2024.

For many stocks, especially those in area 27, the most recent estimates for F/F_{MSY} available in January to May 2025, will be from assessments carried out in 2024 and in most cases the most recent estimate of F/F_{MSY} will be up to and including the years 2023. Hence, the SHI values in the fleet report for the year 2023, could be computed using such estimates, since Member States in principle, have access to both the fleet economic data and stock assessment results.

⁵ STECF report 15-02; sections 2.7, 2.8, 2.9; STECF report 15-15; 3.5.1, 3.6.1, 3.8, 3.9, 3.10, 3.11. STECF report 16-09; 4.2, 4.3, 4.4, 4.5.; STECF report 17-08; 3.4 and ANNEX I; STECF report 18-14; 3.4 and ANNEX I; STECF report 19-13; 3.4 and ANNEX I.

If the SHI estimates presented in the Member States' fleet reports are not based on the most recent data on the value of landings and scientific estimates for F/F_{MSY} , the Expert group notes that the Member State's analysis of the balance between fleet capacity and fishing opportunities is not strictly in line with the Commission guidelines.

Furthermore, when the indicator values presented in the fleet report submitted by 31 May 2025 are derived from the report of the STECF EWG 24-13, no comparison between those computed by the STECF EWG 25-12 is reported in the EWG 25-12 report.

2.2 A cautionary note concerning the Stocks At Risk indicator.

Criteria to produce a SAR indicator value

- *for the European mainland fleet segments and for fleet segments in the Outermost Regions fleet segments that comprise vessels more than 12 m in length:*

In order to flag a stock at risk for a fleet segment, one of the following 2 criteria needs to be fulfilled

- i) The landings from a stock at risk by the fleet segment account for more than 10% of the total landings by the fleet.
- or
- ii) The landings from a stock at risk by the fleet segment account for more than 10% of the total catches from the stock at risk.

- *for the Outermost Regions fleet segments that comprise vessels of less than 12 m in length:*

In order to flag a stock at risk for a fleet segment, the following 2 criteria needs to be fulfilled

- i) The landings from a stock at risk by the fleet segment account for more than 10% of the total landings by the fleet.
- and ii) The landings from a stock at risk by the fleet segment account for more than 20% of the total catches from the stock at risk.

For the second criterion above in each case (ii) and particularly with regard to the Outermost regions or fishing areas with shared stocks, the resulting SAR value may be misleading. Some fleets exploit highly distributed or shared stocks that are considered at risk, although the catches from such stocks are relatively small compared to the total international catches. The 10% or 20% threshold in (ii) above is a proxy for the amount of fishing mortality exerted by a fleet on a stock at risk relative to the total fishing mortality on the stock at risk. Hence to derive the appropriate value for the SAR indicator we require the landings by the fleet and the total international landings from the stock.

However, for the majority of stocks, the EWG only has access to the total landings by the EU fleet and the EU fleet segment-specific landings. Hence, allocating a stock at risk to the SAR indicator value using the landings by fleet segment as a proportion of the total EU fleet landings, means that the proxy for the amount of fishing mortality on the stock at risk is inflated by an unknown amount. This in turn, may mean that the number of stocks at risk that contribute to the SAR indicator value for a fleet segment, will be greater than would be the case if total international landings were to be used. Such a situation becomes increasingly likely as the total EU landings expressed as a proportion of the total international landings from a stock at risk declines.

Other concerns relate to the fact that Guidelines specify that a stock at risk may be included in the SAR indicator if the proportion of landings by fleet segment exceeds the 10% or 20% thresholds, whereas it would be more appropriate if such proportions related to catches. In such cases, the value of the SAR is likely to change but could increase or decline on a case-by-case basis. A further issue is that if a segment catches many species, as is the case in many fisheries (even if only a few are landed), the probability of a stock at risk exceeding the 10%/20% threshold for inclusion in the SAR indicator declines with the increase in the number of species caught.

On the other hand, the EWG reiterates previous its observations that there is a risk that SAR indicator values are underestimated in certain regions for which there are few stock assessments and management advice, because criteria a and b for selecting stocks at risk cannot be considered.

Hence cases where criterion (ii) is used to select a stock for inclusion in the SAR indicator require close scrutiny on a case-by-case basis.

In this report, EWG will continue to compute the fleet segment-specific values for the SAR indicator using the total reported EU landings from stocks considered “at risk”. However, during the Preparatory Balance Capacity WG held in September this year, efforts were made to collect international landings data in order to compute SAR indices based on such data and to compare the different values. Nevertheless, only partial data on international landings were available and, in some cases, it was unclear as to which units (tonnes, kg etc.) the landings were being reported. Collection of the total international landings data will be pursued further during next Balance Capacity EWGs. Meanwhile, it was the intention that in this report, where reported international landings of stocks at risk are available to the EWG, they would be used to compute the SAR indicator values. However, it transpired that for a variety of reasons, primarily a lack of time during the preparatory meeting in September, the EWG was unable to do so. Following an update of the EWG 25-12 report, international landings data has been used for the stocks selected as SAR by the EWG 25-12 and landed by the OMR fleet segments that comprise vessels of less than 12 m in length. Where available, this data has been extracted from the French fleet report.

Furthermore, some additional concerns were expressed previously with regard to the fact that the SAR indicator value can be underestimated because stock assessment results are only available for a small number of stocks especially in the OMR, MBS and OFR (STECF EWG 24-06, STECF PLEN 24-03). Underestimation of the SAR indicator can also occur, if a high number of stocks are harvested by a fleet segment and hence the proportion of a stock at risk in the landings in a fleet segment, may not reach the 10% threshold required. Hence, in such cases, under criterion (i), SAR indicator would underestimate the number of stocks at risk that are caught, by a fleet segment especially in multispecies fisheries such as in OMR, OFR and MBS (STECF EWG 24-06, STECF PLEN 24-03). A further issue is that if there are many fleet segments exploiting the same stock at risk, the probability that the proportion of the landings by a fleet segment exceeds 10% (20% for <12m vessels in the OMR) decreases as the number of segments increases.

2.3 Issues concerning clustering and future needs

In the National chapters, so-called “traffic-light” tables summarise whether according to the Commission Guidelines the indicator status according to a colour coded key e.g. green = “in balance”, red = “out of balance” etc. However, in many cases, Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire

cluster and not for the individual fleet segments that make up the cluster. Ideally for clusters, the biological and technical indicators will be available for the individual segments that make up the cluster, but only if the Member State has reported the relevant data at the segment level. Where biological and technical information is reported only for the cluster as a whole, the indicator status (colour shading red, green etc) is applied to the entire cluster. In such cases, the status may not reflect that for the individual fleet segments in the cluster.

To provide segment-specific values for the SAR indicator and the SHI, data on landings (weight and value) are required at the DCF segment level (i.e. country + supra region + fishing technique + vessel length + geo indicator + activity) for each fleet segment in the cluster.

In some cases, Member States may provide data on landings at the cluster level because of confidentiality issues. In such cases it is highly desirable that such cases are identified in the data submission so that the EWG can identify cases where the relevant landings' data are not available for separate fleet segments.

The additional information needed is as follows:

1- Regarding confidentiality issues

country/supra region /fishing tech /vessel length /geo indicator /activity / year /data provided (True or False)

2- Regarding clustering

country/supra region /fishing tech /vessel_length /geo indicator /activity / year / fs_name

2.4 Structure of the report

Following the request from the Commission in 2024 to provide a dedicated report on the balance between Capacity and fishing opportunities for fleets based in the Outermost regions of France, Portugal and Spain, it was agreed that the current report should include separate sections concerning those fleets based in Mainland Europe and those based in the Outermost Regions.

3. TASK 1 - ASSESSMENT OF BALANCE INDICATORS

3.1 Background

All indicator values computed by the STECF EWG 25-12 were calculated in accordance with the 2014 and 2024 Commission guidelines (COM (2014) 545 final and COM (2024) 223 Final respectively). Such guidelines seek to provide a common approach for estimating the balance over time between fishing capacity and fishing opportunities according to Art 22 of Regulation (EU) No 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy.

Following an update of the EWG 25-12 report, the SAR indicator for fleet segments that comprise vessels of less than 12 m in length, has been calculated in accordance with the 2025 Commission guidelines (COM (2025) 798 final).

3.2 Provision of Indicator Values

All indicator values used by the EWG 25-12 are available in ANNEX V of this report.

3.2.1 Indicator Calculation Process

Economic and technical indicators for the period 2013-2023 were prepared by the STECF EWGs 25-03 and 25-07 (2024 Annual Economic Report on the EU Fishing Fleet (AER 2025)). The SAR list and corresponding data base were prepared under contract by Armelle Jung. Most recent GFCM and ICES stock assessment results were compiled by Andrea Pierucci. Updated information on stock assessments carried out at FAO/GFCM working groups was collected during preparatory meeting. SHI and SAR values by fleet segment were computed by Jerome Guitton.

All indicator values were reviewed at a preparatory expert group held from 2-4 September 2025 (Prep EWG 25-12). The values used for this report were those finalised and agreed following the preparatory expert group on the 12 of September 2025. Indicators, data sources and other relevant information regarding their computation are listed in Table 3.2.1.1.

A table containing all the balance indicators by Member State (MS) and fleet segment (supra-region + fishing technology + vessel length) was compiled by the JRC and provided to EWG 25-12. Indicator values were computed for each year over the period 2013-2023. Specific details on computing indicator values are given in Annex I to this report.

Table 3.2.1.1. Indicators provided to experts at EWG 25-12.

Indicator		Calculated by	Comments
Biological indicators	SHI	Jerome Guitton	- Calculated by landings value for 2008-2024* for every EU fleet segment for which data were available (2024 data are provisional and may be subject to change): - Data sources for stock assessment parameters from ICES and ICCAT for fleet segments operating in Area 27. Effort were made this year to include ICES Category 3 stocks. That may have given rise to unforeseen data issues, as the ICES report formatting is not yet strictly formalized. A request should be made to ICES to provide Fishing pressure proxy values in a standardised way for category 3 stocks in order to be able to quantify whether a stock is overfished or not. - For fleet segments operating in Area 37 the data sources for stock assessment parameters include: - A database of STECF, ICES and GFCM stock assessment results compiled by the JRC. Updated information on stock assessments carried out at FAO/GFCM working groups was collected during preparatory meeting.
	Sustainable Harvest Indicator		

			○ Tuna fisheries stock assessment • For fleet segments operating in Outermost regions the data sources for stock ○ CECAF Working group ○ South Pacific Regional Fishery Management Organization ○ Tuna commissions • National stock assessments are included (France : 51 stocks, Portugal 1, Spain 0). They are used only when computing the SHI indicator value for vessels less than 12m in the OMR (COM(2024) 233) • Coverage ratio was also provided to give the part of the landing values that are included in the SHI. This is a quality indicator and the higher the ratio is, the higher the validity of SHI. Values are not taken into consideration if the ratio is less than 40%. • EDI, NOS, NSR have been provided. • ToR 4: the output was described in the term of reference. For each Member State, those fleet segments that according to the 2020 values for either i) the SHI as computed by the STECF, were indicated to be out of balance with fishing opportunities together with the fish stocks on which such segments rely and the fishing area to which such segments are attributed were listed. Separate lists were provided for each indicator. The fish stocks on which a fleet segment is reliant were determined by ranking the landings from all stocks caught by that fleet segment in descending order in terms of landings value and listing those stocks that account for 75% of the total value of the landings by that fleet segment. The area to which a fleet segment is attributed was given as FAO area 27 (=NAO), FAO area 37 (=MBS), other fishing regions (OFR) and Outermost regions OMR.
	SAR Stocks at Risk Indicator	Armelle Jung Jerome Guitton	• Calculated for 2009-2024* for all fleet segments for which data were available. • Selection of the stocks at risk was prepare by Armelle Jung then complemented, checked and endorsed by the preparatory EWG 25-12: • For fleet segments operating in Area 27, the most recent ICES Advice on fishing opportunities was accessed through the ICES website (up to the cut-off date 05/09/2024). • This year special efforts were made to increase the SAR coverage. Accordingly, Annex IV now lists all stocks that can be considered “at risk” although such stocks will not necessarily contribute to the SAR indicator value for fleet segments.

		• In addition, efforts were made to collect international landing data to provide more apposite SAR indicator values than those derived using EU landings data only. However, for OFR stocks, this exercise had only limited success and hopefully such data will become more readily available in future. In the updated version of the report, international landings for the stocks selected as SAR by the EWG 25-12 and landed by OMR fleet segments (<12 m) have been updated using the values reported in the French fleet report. • For fleet segments operating in Area 37, the most recent GFCM/SAC reports were taken into account. • For fleet segments operating in other areas (OFR), the relevant RFMO reports were checked. However, during Preparatory EWG 25-12 the stock assessment results in the CECAF report released in 2025 were not included due to lack of time. • Additional information was taken from Council Regulations fixing annual fishing opportunities; as well as from GFCM, ICCAT, CECAF, IOTOC, SEAFO, NAFO or SPRFMO scientific assessments reports, advices or recommendations. • For IUCN the selection of new species was done based of the following criteria: • Red List Category: CR/EN/VU • Taxonomy: Fish, Mollusc and Echinoderms • Land Region: ALL • Marine Region: ALL • Habitat: ALL including Marine • Use & Trade: Food Human/ Food Animal/Medecine/Manufacturing chemical/ Other chemical/Fuels • Systems: ALL including Marine system • Assessment: Global / Regional 2024- 2025 • After mapping species landings and catching areas to rebuild stocks, SAR indicator values were provided by fleet segment using a SQL script developed by Jerome Guitton. The complete list of species identified as at risk for the year 2025 is given in Annex IV.
Economic indicators ROI or RoFTA The Return on Investment (ROI) or Return on	JRC	• Calculated using the same principle as STECF EWG 25-07. • The target reference value to which the indicator value is compared is the 5-year average (2019-2023) risk-free interest rate.

	Fixed Tangible Assets (RoFTA)		Calculated for years 2013-2023, the most recent year for which DCF economic data are available. ROI is calculated only when MS provided the value of fishing rights in the 2025 DCF Fleet Economic Data Call. Values are in real terms, i.e., nominal values adjusted for inflation (base=2023)
	CR/BER Current revenue as proportion of break-even revenue	JRC	- Calculated for years 2013-2023, the most recent year for which DCF economic data are available. - The long-term viability analysis of CR/BER approach was taken. Values are in real terms, i.e., nominal values adjusted for inflation (base=2023)
	Net profit margin Net profit to Revenue	JRC	- Calculated using the same principle as STECF EWG 25-07; - Calculated for years 2013-2023, the most recent year for which DCF economic data are available. Values are in real terms, i.e., nominal values adjusted for inflation (base=2023)
	NVA/FTE Net Value Added per Full Time Equivalent	JRC	- Calculated using the same principle as STECF EWG 25-07; - Calculated for years 2013-2023, the most recent year for which DCF economic data are available. - Values are in real terms, i.e., nominal values adjusted for inflation (base=2023)
Technical/inactivity indicators	VUR Fleet segment utilisation indicator Average Days at Sea / Maximum Days at Sea	JRC	- Calculated for years 2013-2023. - Calculated when MS provided provided in the 2025 DCF Fleet Economic Data Call, either maximum observed days at sea (DAS) for each fleet segment or maximum theoretical DAS. - The EWG also used the value of 220 maximum theoretical days at sea (VUR₂₂₀) per fleet segment, as stipulated in the 2014 Commission guidelines, to accommodate cases where the relevant information was not provided by MS. - VUR_{nn} : Member States have the provision to choose a different theoretical maximum. This value should be determined by each Member State using an expert judgement and available information.
	Inactive vessels per length category	JRC	Number of inactive vessels and proportion of inactive vessels in number, GT and kW by vessel length class.

Data sources: 2024 DCF Fleet Economic Data Call; ICES online stock assessment database; JRC STECF stock assessment database; GFCM stock assessment database; Stock assessment results from all relevant Regional Fisheries Organisations where EU fleets have an interest; IFREMER (French national assessments) for stocks in the French Outermost regions; CITES species list; IUCN Red List. NOTE however, that as for the EWG 22-15 and 23-13 reports, the results of stock assessments carried out by a Russian-Norwegian WG were not taken into account in computing the SHI and SAR indicators in this report (EWG 24-13).

**Based on provisional data*

Source: Own elaborations.

3.2.2 Data Source and Coverage

The data used by the STECF EWG 25-12 to compute the various indicators were collected under the Data Collection Framework (DCF), Council Regulation (European Commission (EC) No 199/2008 of 25th February 2008), amended by the multiannual Union programme for the collection, management and use of data in the fisheries and aquaculture sectors for the period 2017-2019 (EU-MAP) (see the Commission Implementing Decision (EU) 2016/1251 of 12 July 2016 and the Council Regulation (EC) No 199/2008 on a framework for the collection of data in the fisheries sector). Technical and economic balance indicators were calculated using data submitted under the call for fleet economic scientific data concerning 2008-2023/24 issued by DG MARE in 2025. The two biological indicators (SHI and SAR indicator) were calculated based on transversal (landings) data submitted under the same data call. Additional information needed to calculate the biological indicators was obtained from other sources (see Table 3.2.1.1).

The 2025 fleet economic data call requested transversal and economic data covering years from 2008 to 2023/2024. Capacity data (GT, kW, no. of vessels) was requested up to and including 2024, while employment and economic parameters were requested up to and including 2023. Most effort and all landings' data were requested up to and including 2024, albeit on a voluntary basis, to allow for economic performance nowcasts to be estimated for 2024 and projections for 2025. Landings and effort data for fleet segments operating in the Mediterranean & Black Sea region (i.e. Area 37 or MBS) were requested at the GFCM-GSA level. This level of aggregation was requested to correctly allocate landings to the relevant stocks when calculating the biological balance indicators (see STECF 15-02 / 15-15 reports).

In terms of the completeness of the Member States data submissions, most countries submitted most of the parameters requested under the fleet economic data call. Overall, there has been an improvement in the data quality and coverage over time. In many cases missing data relates to fleet segments with low vessel numbers, for which data are hard to obtain or for confidentiality reasons.

Regarding confidentiality, Member States may aggregate fleet segments into clusters to provide sensitive economic data. However, in several cases, clustering may not be enough to guarantee confidentiality, and hence, parts of MS fleets may not be completely covered. These generally relate to distant-water fleet segments and include MS such as Estonia, Italy and Poland.

Specific data issues at MS level, which can affect the quality and coverage of the balance indicators are summarised in the AER 2025.

3.2.3 Biological Indicator Visualisation Tool

The expert responsible for the calculation of the SHI values (J. Guitton), has developed an interactive tool which allows users to visualise the input data as well as the results of the biological indicator calculations. The tool is available at:

Link: https://sirs.agrocampus-ouest.fr/stecf_balance_2025/

The input data and balance indicator calculation results can be viewed thematically at fleet segment, country, supra-region level, stock, stocks at risk.

To be in line with the 2024 guidelines for vessels less than 12m in length in the Outermost regions, specific factsheets were developed under the label “Outermost region” of the dashboard.

For stocks assessments conducted at the national level, a specific entry 'Stock non rfmoss' has also been included.

For example, input data such as landings data can be visualised by weight or value; graphs showing the list of stocks used in calculations and the corresponding time-series of F/F_{MSY} used for each stock can be displayed; indicator results can be viewed individually or as a combination of a number of indicators displayed on the same graph. The online tool includes updated values of (i) biological indicators specified in the 2014 Commission guidelines, and (ii) the alternative indicators suggested in STECF reports 15-02 and 15-15.

The country label entries in the dashboard of the online tool, now exclude information for fleet segments that are included under the OMR label.

The visualisation tool deals mainly with data provided under the annual fleet economic data call (AER data), SHI (+ ratio), EDI, and SAR indicator values.

All the data are downloadable using the  link in the interactive tool.

The expert group considers that the tool provides a useful and informative synthesis of the available indicator values and makes the inputs and calculation process transparent. It could also aid Member States to identify and select those fleet segments that require targeted management measures to address the issue of balance/capacity.

3.2.4 Overview of data and information to compute biological indicators (SHI and SAR)

The EWG 25-12 was able to produce a variety of data and information which is likely to prove useful to researchers and Member States to undertake additional analyses and research on the balance between fishing capacity and fishing opportunities. Such data and information are presented in a single excel workbook with filename “Annex IA Annex IB Annex IC and Annex III.xlsx”. The workbook contains 6 separate worksheets including a metadata worksheet describing the data presented in each of the other worksheets. An overview of the different annexes is given below.

Annex IA : Stock reference list for biological indicators including splitting values.

Sheet Annex IA provides the distribution of the species per area enabling to species-specific landings to be allocated to stocks.

- When two or more stocks both occur in the same area, a splitting value is used to allocate the proportion of catches from the area to each stock.

- When a species overlaps different areas and is not separated into different stocks, the geographical area of distribution of the species as described in the scientific literature, defines the species as a single stock.

- **Annex IB : SAR Decision Table**

Sheet Annex IB provides the input data used to determine whether a particular stock can be considered a stock at risk (SAR). The data given as follows:

- the stock code,
- the species 3 alpha code
- the decision status as a stock at risk for each year of the time series 2009-2023 (ALL = stock listed at risk / 0= stock not listed at risk)

The data presented allow a value for SAR to be computed/reproduced for each stock.

- **Annex IC : SAR Calculation detailed**

Sheet Annex IC provides the value of the SAR indicator by country, geo indicator, fleet segment, and year (-1= no SAR, 0= no SAR calculated, >1 = the number of SAR reaching the definition).

It presents the related stock name, the related criteria (a/b/c/d) and the threshold rule for selection (10% of the FS landings, 10% of the stock landings, or both; for fleets segments in the Outermost Regions of France, Portugal and Spain, Member States have the provision to use a threshold of 20% of stock landings (see Commission Guidelines COM (2024) 233 Final) instead of 10% as prescribed in COM (2014) 545 Final).

The data can be filtered for the above criteria to identify the SAR for subsets of the data.

- **Annex III Area 27** : Stocks on which fleet segments out of balance (SAR or SHI) are reliant - North Atlantic (Area 27)
- **Annex III Area 37** : Stocks on which fleet segments out of balance (SHI or SAR) are reliant - Mediterranean and Black Seas (Area 37)
- **Annex III OFR** : Stocks on which fleet segments out of balance (SHI or SAR) are reliant – OFR
- **Annex III OFR_update** : Following the update of the report; Stocks on which fleet segments out of balance (SHI or SAR) are reliant – OFR

4. FLEETS BASED IN MAINLAND EUROPE

4.1 Fleet Capacity in terms of numbers of vessels, Gross Tonnage and engine power.

Total numbers of vessels and total numbers of inactive fishing vessels based in Mainland Europe by Member State, length class and region are given in Tables 4.1.1 and 4.1.2 respectively. The proportions of inactive vessels expressed as a percentage of the total number of vessels are given in Table 4.1.3. Active and inactive capacity expressed in terms of gross tonnage and engine power are given in Tables 4.1.4 – 4.1.9.

Table 4.1.1. Total number of vessels by length group and supra-region for each Member State in 2022.

REGION	MBS						NAO								OFR						
Vessel Length	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
BEL											1	27	37								65
BGR	719	975	59	18	11																1782
CYP	398	404	38	1	6																847
DEU							710	42	161	5	112	76	21	10						1	1138
DNK							258	1170	87	68	203	64	34	27							1911
ESP	160	1208	386	385	157	2		4622		412	605	245	306	13			1	5	117	87	8711
EST							1730		284			5	20	5							2044
FIN							2564		620		29	8	16	3							3240
FRA	316	930	23	32	44	8		1489		676	392	188	116	11	1791	128	18	19	2	20	6203
GRC	3772	7586	366	221	171																12116
HRV	4319	2741	329	101	105																7595
IRL								1500		225	92	77	78	21							1993
ITA	2283	6069	2322	715	282	13													1	4	11689
LTU							85		17		1	3	13	2						6	127
LVA							171		50		9		31	4						2	267
MLT	404	359	20	36	9																828
NLD								311		35	34	180	63	57							680
POL							331		328		56	63	45							2	825
PRT					1			5881		302	375	146	145	12					12	4	6878
ROU	14	133	21	3	2																173
SVN	59	60	16	1																	136
SWE							355	274	170	90	87	34	22								1032
Total	12444	20465	3580	1513	788	23	5849	15015	1547	1723	1909	1082	925	165	1791	128	19	24	132	126	70280

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

Table 4.1.2. Number of inactive vessels by length group and supra-region for each Member State in 2023.

REGION	MBS						NAO								OFR						
Vessel Length	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
BEL												5	2								7
BGR	294	376	7	3																	680
CYP	28	34	8		3																73
DEU							224	31	20	3	11	5	5	1							300
DNK							5	687	1	22	22	6	3	6							752
ESP	67	242	57	21	11			740		42	58	14	13	1			1	3	11	4	1285
EST							687		117				3	2							809
FIN							1657		404		16	1	3	1							2082
FRA	53	165	2	9	6			188		43	18	23	4	2	471	31		9		1	1025
GRC	395	908	99	37	13																1452
HRV	651	708	115	35	39																1548
IRL								508		58	18	9	6	1							600
ITA	528	1126	321	41	24	2													1	1	2044
LTU							36		13		1	2	9							1	62
LVA							51		9				5	1							66
MLT	98	75	3	8	3																187
NLD								146		18	19	20	6	3							212
POL							3		13		7	10	2								35
PRT								3216		86	127	27	27	5							3488
ROU	4	24	2																		30
SVN	37	20	5	1																	63
SWE							104	45	43	5	23										220
Total	2155	3678	619	155	99	2	2663	5516	577	272	297	122	88	23	471	31	1	12	12	7	17020

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

Table 4.1.3. Proportion (%) of inactive vessels by length group and supra-region for each Member State in 2023.

REGION	MBS						NAO								OFR						% for all region
Vessel Length	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	
BEL											0	19	5								11
BGR	41	39	12	17	0																38
CYP	7	8	21	0	50																9
DEU							32	74	12	60	10	7	24	10						0	26
DNK							2	59	1	32	11	9	9	22							39
ESP	42	20	15	5	7	0		16		10	10	6	4	8			100	60	9	5	15
EST							40		41			0	15	40							40
FIN							65		65		55	13	19	33							64
FRA	17	18	9	28	14	0		13		6	5	12	3	18	26	24	0	47	0	5	17
GRC	10	12	27	17	8																12
HRV	15	26	35	35	37																20
IRL								34		26	20	12	8	5							30
ITA	23	19	14	6	9	15													100	25	17
LTU							42		76		100	67	69	0						17	49
LVA							30		18		0		16	25						0	25
MLT	24	21	15	22	33																23
NLD								47		51	56	11	10	5							31
POL							1		4		13	16	4							0	4
PRT					0			55		28	34	18	19	42					0	0	51
ROU	29	18	10	0	0																17
SVN	63	33	31	100																	46
SWE							29	16	25	6	26	0	0								21

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

Table 4.1.4. Total Gross tonnage of vessels by length group and supra-region for each Member State in 2023.

REGION	MBS						NAO								OFR						
Vessel Length	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
BEL											42	4652	24410								29104
BGR	1117	4223	2341	1644	1193																10518
CYP	884	2901	2676	105	1236																7802
DEU							1878	212	2472	110	7214	9996	11484	65716						9182	108264
DNK							940	5566	1405	1753	16763	14515	20884	87062							148888
ESP	305	8221	26081	60504	126976	700		22976		8837	48402	91344	285060	154478			18663	38370	144029	259971	1294917
EST							2352		2358			629	10236	19668							35243
FIN							6618		7758		1570	1304	10136	2654							30040
FRA	568	5994	21305	31231	44698	2524		15865		20037	40143	53490	67399	85690	64357	53739	558	89074	611	106876	704159
GRC	5238	42185	13027	21625	43174																125249
HRV	7809	19381	11965	14270	33059																86484
IRL								7415		4987	6408	21702	34953	55992							131457
ITA	4581	29718	77226	85208	71888	10182													36286	10638	325727
LTU							193		259		45	630	4046	921						63969	70063
LVA							322		558		277		8880	21468						8814	40319
MLT	868	3158	822	5434	3328																13610
NLD								1174		600	1408	24098	27064	121042							175386
POL							1354		4664		3084	7544	15182							19563	51391
PRT					224			35562		11264	32863	39163	115995	47710					3649	2656	289086
ROU	19	737	1420	318	228																2722
SVN	110	474	525	228																	1337
SWE							820	2017	3069	2028	16299	3957	12276								40466
Total	21499	116992	157388	220567	326004	13406	13657	88770	19474	47588	158219	269067	635729	662401	64357	53739	19221	127444	184575	481669	3722232

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

Table 4.1.5. Total Gross tonnage for inactive vessels by length group and supra-region for each Member State in 2023.

REGION	MBS						NAO								OFR						
Vessel Length	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
BEL												394	511								905
BGR	224	777	149	134																	1284
CYP	30	108	169		315																622
DEU							294	65	98	22	333	300	703	5988							7803
DNK							10	1275	9	254	806	446	895	3603							7298
ESP	56	723	1156	1116	1142			1040		283	913	942	2576	825			34	229	2794	3034	16863
EST							467		486				644	2573							4170
FIN							2134		2509		388	63	428	387							5909
FRA	52	528	19	647	691			613		448	768	3210	724	2492	946	230		1073		2666	15107
GRC	275	2553	1747	1820	1736																8131
HRV	653	2816	2057	1705	5914																13145
IRL								935		579	763	1041	1068	1152							5538
ITA	530	3247	4465	2389	3096	525													228	435	14915
LTU							40		101		22	194	935							1943	3235
LVA							52		44				491	723							1310
MLT	104	291	49	602	338																1384
NLD								264		180	388	930	718	659							3139
POL							3		127		163	472	239								1004
PRT								3274		710	2395	1357	5784	7403							20923
ROU	2	60	62																		124
SVN	33	75	71	114																	293
SWE							135	128	323	50	5782										6418
Total	1959	11178	9944	8527	13232	525	3000	7466	3374	2476	6939	9349	15716	25805	946	230	34	1302	3022	8078	139520

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

Table 4.1.6. Proportion (%) of inactive gross tonnage by length group and supra-region for each Member State in 2023.

REGION	MBS						NAO								OFR						% for all region
Vessel Length	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	
BEL											0	8	2								3
BGR	20	18	6	8	0																12
CYP	3	4	6	0	25																8
DEU							16	31	4	20	5	3	6	9						0	7
DNK							1	23	1	14	5	3	4	4							5
ESP	18	9	4	2	1	0		5		3	2	1	1	1			0	1	2	1	1
EST							20		21			0	6	13							12
FIN							32		32		25	5	4	15							20
FRA	9	9	0	2	2	0		4		2	2	6	1	3	1	0	0	1	0	2	2
GRC	5	6	13	8	4																6
HRV	8	15	17	12	18																15
IRL								13		12	12	5	3	2							4
ITA	12	11	6	3	4	5													1	4	5
LTU							21		39		50	31	23	0						3	5
LVA							16		8		0		6	3						0	3
MLT	12	9	6	11	10																10
NLD								22		30	28	4	3	1							2
POL							0		3		5	6	2							0	2
PRT					0			9		6	7	3	5	16					0	0	7
ROU	12	8	4	0	0																5
SVN	30	16	14	50																	22
SWE							16	6	11	2	35	0	0								16

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

Table 4.1.7. Total engine power (kW) for vessels by length group and supra-region for each Member State in 2023.

REGION	MBS						NAO								OFR						
Vessel Length	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	
BEL											221	11868	84102								96191
BGR	14486	55616	18920	9041	3289																101352
CYP	23024	40177	13516	294	4625																81636
DEU							24936	2724	22260	1052	43702	33780	29548	74842						8640	241484
DNK							14304	78890	13780	16739	78259	42197	49754	155077							449000
ESP	3397	84035	116003	191831	279181	2386		265783		60849	219677	286162	578941	205604			84095	120643	278722	347382	3124691
EST							26988		17280			1694	25998	34212							106172
FIN							160842		129390		12540	6970	28788	6538							345068
FRA	21142	193794	110880	102782	112652	7888		483129		221679	202223	168851	164367	132499	2318855	624390	3766	284573	1159	174208	5328837
GRC	74217	362409	75851	101926	104783																719186
HRV	82096	332718	105769	59769	113627																693979
IRL								71327		35981	24607	57305	81002	95728							365950
ITA	27751	464927	641938	404820	257859	26718													129426	24623	1978062
LTU							4306		1517		220	1517	8446	2135						62517	80658
LVA							3682		3654		1832		21884	26610						10304	67966
MLT	26464	75230	6961	22302	10587																141544
NLD								44424		9344	9334	74630	65348	210850							413930
POL							12791		34434		13673	28444	36398							21000	146740
PRT					462			526992		94096	181811	149227	297410	55141					6647	3549	1315335
ROU	130	3693	6072	846	555																11296
SVN	1576	9072	6197	0																	16845
SWE							22272	47800	39917	31052	67009	13574	28723								250347
Total	274283	1621671	1102107	893611	887620	36992	247849	1473269	222315	439740	788099	862645	1471986	999236	2318855	624390	87861	405216	415954	652223	16076269

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

Table 4.1.8. Total engine power (kW) for inactive vessels by length group and supra-region for each Member State in 2023.

REGION	MBS						NAO								OFR								
Vessel Length	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX			
BEL												1095	2322								3417		
BGR	2856	10235	1424	722																	15237		
CYP	869	1684	1078		1131																4762		
DEU							3285	735	735	239	2062	1058	2194	7320							17628		
DNK							151	17524	53	2691	3436	1375	2340	8866							36436		
ESP	493	7777	5638	3685	3111			11722		2263	4920	2614	5702	1268			140	566	4138	3756	57793		
EST							5359		3510				1743	2376							12988		
FIN							48458		40223		3335	336	1429	1033							94814		
FRA	1635	14105	150	3129	1896			13196		5594	3899	9796	2007	4100	47076	6415		3140		3800	119938		
GRC	3887	21938	10152	8668	4150																48795		
HRV	8518	51502	17637	7795	19465																104917		
IRL								9087		5039	2747	2897	2975	2720							25465		
ITA	3398	53026	44443	11557	11567	2096													331	990	127408		
LTU							765		532		110	386	1820							1764	5377		
LVA							484		260				1249	853							2846		
MLT	3425	7303	486	2366	1886																15466		
NLD								7690		2584	2502	3686	1874	1721							20057		
POL							10		742		729	2150	618								4249		
PRT								36588		6076	13155	5564	14358	9513							85254		
ROU	4	330	274																		608		
SVN	448	1540	1122	0																	3110		
SWE							3155	3044	3629	734	17571										28133		
Total	25533	169440	82404	37922	43206	2096	58512	96542	46055	24486	36895	30957	40631	39770	47076	6415	140	3706	4469	10310	834698		

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

Table 4.1.9. Proportion (%) of inactive engine power (kW) by length group and supra-region for each Member State in 2023.

REGION	MBS						NAO								OFR						% for all region
Vessel Length	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	
BEL											0	9	3								4
BGR	20	18	8	8	0																15
CYP	4	4	8	0	24																6
DEU							13	27	3	23	5	3	7	10						0	7
DNK							1	22	0	16	4	3	5	6							8
ESP	14	9	5	2	1	0		4		4	2	1	1	1			0	0	1	1	2
EST							20		20			0	7	7							12
FIN							30		31		27	5	5	16							27
FRA	8	7	0	3	2	0		3		3	2	6	1	3	2	1	0	1	0	2	2
GRC	5	6	13	9	4																7
HRV	10	15	17	13	17																15
IRL								13		14	11	5	4	3							7
ITA	12	11	7	3	4	8													0	4	6
LTU							18		35		50	25	22	0						3	7
LVA							13		7		0		6	3						0	4
MLT	13	10	7	11	18																11
NLD								17		28	27	5	3	1							5
POL							0		2		5	8	2							0	3
PRT					0			7		6	7	4	5	17					0	0	6
ROU	3	9	5	0	0																5
SVN	28	17	18																		18
SWE							14	6	9	2	26	0	0								11

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

4.2 Fleet Segment Coverage

As reported above, the estimation of the balance indicators requires multiple data coming from different sources. As data are not available for all fleet segments, the balance indicators are calculated for a proportion of the EU fleet. This proportion depends on the specific indicator and its data needs. For instance, the VUR indicator needs data on the maximum days-at-sea, which are provided by MS on a voluntary basis. When these data are not provided, the indicator cannot be calculated. On the other hand, the calculation of the $SHI \geq 40\%$ indicator depends on the availability of stock assessment information. When estimates for F and F_{MSY} for stocks in an area are not available, the indicator cannot be calculated for the fleet segments exploiting that area.

To provide a measure per MS of the proportion (%) of fleet segments for which an indicator is calculated, the landings value of such fleet segments is divided by the total landings value of the MS fleet. The use of the landing's values instead of the number of fleet segments to calculate these percentages is aimed to consider the importance of the fleet segments concerned in terms of their contribution to the catches at MS level.

Table 4.2.1 shows the coverage (%) of each balance indicator in terms of landed value submitted by MS for the reference year 2023. Assuming that data on landings value are available for all fleet segments, a value of 100% means that the indicator is calculated for all fleet segments or, equivalently, for a number of fleet segments covering 100% of the MS landings value. Alternatively, in such a case the data required to calculate that indicator are available for all fleet segments.

Values for the SHI indicator are reported in Table 4.2.1 for

- (i) SHI values that were calculated for all stocks with assessment data, even if the proportion of landings value of the assessed stocks made up less than 40% of the total landings value of the fleet segment (in such cases, the indicator is considered as unrepresentative/unreliable), and
- (ii) SHI values calculated only for those fleet segments for which the proportion of landings value of the assessed stocks made up more than 40% of the total landings value of the fleet segment.
- (iii) For the SAR indicator, all fleet segments with corresponding landings data were screened for stocks falling under the definition of stocks at risk; all of the landings (in weight) data provided by MS were thus considered in the SAR analysis.

It is important to note that full coverage in Table 4.2.1 does not necessarily mean that the entire MS fleet was covered. For confidentiality reasons, some MS may not provide landings data for specific fleet segments in cases where the data are considered sensitive and clustering of fleet segments may be insufficient to overcome breaching confidentiality rules. In some cases, only landings in weight are provided without the corresponding landed values for all active fleet segments reported by a MS. Indicator coverage is thus only relative to the data provided (value of landing), and should be considered together with the number of fleet segments and/or vessels.

In other cases, fleet segments are omitted entirely, i.e. not even capacity data are reported by MS.

Table 4.2.1. Coverage of each balance indicator in terms of landed value submitted by MS for the reference year 2023. SHI>40% = coverage of fleet segments for which SHI could be calculated and considered as meaningful (coverage of fleet segments where proportion of landings value of the assessed stocks made up more than 40% of the total landings value of the fleet segment).

MS	SAR	SHI	SHI>40%	CR/BER	RoFTA	RoI*	VUR (MaxSeaDays)
BEL	100%	100%	100%	100%	100%	0%	100%
BGR	100%	100%	80%	100%	100%	0%	100%
CYP	100%	100%	41%	89%	89%	0%	0%
DEU	100%	100%	79%	100%	100%	0%	100%
DNK	100%	98%	66%	100%	100%	100%	0%
ESP	100%	99%	65%	100%	100%	33%	100%
EST	100%	100%	86%	100%	100%	100%	83%
FIN	100%	100%	71%	100%	100%	100%	100%
FRA	100%	99%	69%	100%	100%	0%	100%
GRC	100%	100%	39%	100%	100%	0%	100%
HRV	100%	100%	80%	100%	100%	0%	100%
IRL	100%	100%	76%	100%	100%	0%	100%
ITA	100%	100%	67%	97%	97%	17%	100%
LTU	100%	100%	99%	100%	100%	100%	100%
LVA	100%	100%	100%	100%	100%	0%	100%
MLT	100%	99%	39%	100%	100%	0%	100%
NLD	100%	100%	64%	100%	100%	86%	100%
POL	100%	100%	72%	100%	100%	0%	0%
PRT	100%	97%	49%	100%	100%	0%	100%
ROU	100%	100%	94%	96%	96%	100%	100%
SVN	100%	100%	0%	100%	100%	0%	100%
SWE	100%	100%	95%	100%	100%	0%	100%

* When value of fishing rights available.

Source: MS data submissions under the 2025 Fleet Economic data call (MARE/A3/ACS(2025)).

4.3 Indicator Findings – Regional Overviews

Out of 525 active fleet segments in 2023 (50,668 vessels) in EU mainland fleet, landings in weight were available for 441 fleet segments or aggregate fleet segments, while value of landings were available for 439 segments. SHI indicator values were available for 410 segments, of which 216 were considered meaningful to assess balance or imbalance (SHI≥40%). Economic indicator values (CR/BER and RoFTA) were available for 338 fleet segments or aggregate fleet segments. RoI values (with value of fishing quota) were available for 67 fleet segments or aggregate fleet segments from 9 Member States.

The SAR indicator was available for 441 fleet segments in 2023. According to the criteria in the 2014 Commission guidelines, EWG 25-12 notes that the SAR results indicate that there were 248 segments that may have been in balance with their fishing opportunities (SAR=0) and 193 segments that may have not been in balance with their fishing opportunities, as follows:

- 1 segment with 10 stocks-at-risk,
- 2 segments with 7 stocks-at-risk,
- 5 segments with 6 stocks-at-risk,
- 4 segments with 5 stocks-at-risk,
- 11 segments with 4 stocks-at-risk,
- 10 segments with 3 stocks-at-risk,
- 31 segments with 2 stocks-at-risk,
- 129 segments with 1 stock-at-risk.

For each region (NAO, MBS and OFR) the number of fleet segments, number of stocks at risk are given in Table 4.3.1.

Table 4.3.1. Summary table for SAR values for 2023, showing the number of fleet segments at regional level (NAO, MBS, and OFR) per number of SAR found.

Supra region	Number of SAR								
	0	1	2	3	4	5	6	7	10
NAO	136	68	21	5	7	3	5	2	1
MBS	103	58	8	3	3				
OFR	9	3	2	2	1	1			
EU total	248	129	31	10	11	4	5	2	1

Source: own elaborations.

4.3.1 NAO – North Atlantic (area 27)

Out of 304 active fleet segments in 2023, landings in weight were provided for 248 fleet segments or aggregate fleet segments, while value of landings were provided for 247 segments, i.e., not provided for 1 segment.

Sustainable harvest indicator (SHI)

SHI indicator values were available for 236 segments, of which 125 could be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise more than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 125 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 67% of the total value of the landings in 2023 provided by MS, and were as follows:

- 72% (90 segments) may be in balance with their fishing opportunities;
- 28% (35 segments) may not be in balance with their fishing opportunities.

For 44 (35%) segments, an improving trend was assessed for SHI while a deteriorating trend was observed for 13 (10%) segments. A further 54 (43%) segments had no clear trend and no trend could be calculated for the remaining 14 segments.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 248 fleet segments, of which 112 segments may not have been in balance with their fishing opportunities in 2023. According to the criteria in the 2014 Commission guidelines, EWG 25-12 notes that the SAR results indicate that:

- 1 segment with 10 stocks-at-risk,
- 2 segments with 7 stocks-at-risk,
- 5 segments with 6 stocks-at-risk,
- 3 segments with 5 stocks-at-risk,
- 7 segments with 4 stocks-at-risk,
- 5 segments with 3 stocks-at-risk,
- 21 segments with 2 stocks-at-risk,
- 68 segments with 1 stock-at-risk.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The number of fleet segments or aggregate fleet segments for which *RoI* is available for 2023 in the North Atlantic region (NAO) is 54 and the number of segments for which trends are calculated is 31.

According to the criteria in the 2014 Commission guidelines, the EWG notes that the *RoI* indicator values for the 54 fleet segments indicate that:

- 28% (15 segments) may be in balance with their fishing opportunities.
- 72% (39 segments) may not be in balance with their fishing opportunities;

For 10 (19%) segments, an increasing trend was assessed for *RoI* while a decreasing trend was observed for 21 (39%) segments. No trend could be calculated for the remaining 23 segments.

RoFTA is available for 196 fleet segments. According to the criteria in the 2014 Commission guidelines, the EWG notes that the *RoFTA* indicator values for the 196 fleet segments indicate that:

- 51% (100 segments) may be in balance with their fishing opportunities.
- 49% (96 segments) may not be in balance with their fishing opportunities.

For 75 (37%) segments, an increasing trend was assessed for *RoFTA* while a decreasing trend was observed for 81 (41%) segments and one with no trend. No trend could be calculated for the remaining 39 segments.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The number of fleet segments for which the *CR/BER* indicator is available is 196 in 2023 for the North Atlantic region (NAO).

According to the criteria in the 2014 Commission guidelines the Expert group notes that the *CR/BER* indicator values for the 196 fleet segments for which balance/out of balance was calculated indicate that:

- 47% (92 segments) may be in balance with their fishing opportunities.
- 53% (104 segments) may not be in balance with their fishing opportunities;

An increasing trend for *CR/BER* was assessed for 54 (28%) fleet segments while a decreasing trend was observed for 70 (36%) segments. A further 33 (17%) fleet segments had no clear trend and no trend could be calculated for the remaining 39 segments.

The Vessel Use Indicator (or Vessel Utilisation ratio)

The Vessel Use Indicator (VUR) was available for 221 fleet segments⁶ in NAO in 2023. According to the criteria in the 2014 Commission Guidelines, the expert group notes the VUR indicator values indicate that:

- 39% (99 segments) may be in balance with their fishing opportunities;
- 61% (152 segments) may not be in balance with their fishing opportunities.

An improving trend for the Vessel Use Indicator was assessed for 16 (7%) fleet segments while a deteriorating trend was observed for 9 (4%) segments. No clear trend was found for 172 (78%) segments, a null/flat trend was found for 5 (2%) segments and no trend could be calculated for the remaining 19 segments.

The Inactive Fleet Indicators

The EU inactive fleets in the North Atlantic (NAO) comprised 9,121 vessels representing approximately 33% of the total vessels registered in the area.

4.3.2 MBS - Mediterranean and Black Sea (area 37)

Out of 201 active fleet segments in 2023, landings in weight and value were provided for 175 fleet segments or aggregate fleet segments.

Sustainable Harvest Indicator (SHI)

SHI indicator values were available for 159 segments, of which 81 could not be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise more than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 81 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 64% of the total value of the landings in 2023 provided by MS, and were as follows:

- 43% (35 segments) may be in balance with their fishing opportunities;
- 57% (46 segments) may not be in balance with their fishing opportunities.

For 43 (53%) segments, an improving trend was assessed for SHI while a deteriorating trend was observed for 1 segment. A further 24 (29%) segments had no clear trend and no trend could be calculated for the remaining 13 segments.

⁶ The VUR value calculated for an aggregate segment (cluster) is applied to all the fleet segments in the cluster.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 136 fleet segments, of which 72 segments may not have been in balance with their fishing opportunities in 2023. According to the criteria in the 2014 Commission guidelines, EWG 25-12 notes that the SAR results indicate that there were:

- 3 segments with 4 stocks-at-risk,
- 3 segments with 3 stocks-at-risk,
- 8 segments with 2 stocks-at-risk,
- 58 segments with 1 stock-at-risk.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The number of fleet segments or aggregate fleet segments for which RoI (with value of fishing quota) is available for 2023 in the Mediterranean and Black Sea (MBS) is 11.

According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoI indicator values for the 11 fleet segments indicate that:

- 45% (5 segments) may be in balance with their fishing opportunities.
- 55% (6 segments) may not be in balance with their fishing opportunities.

An increasing trend was assessed for 1 segment while a decreasing trend was observed for 9 (82%) segments. Remaining segments showed no trend.

RoFTA is available for 131 fleet segments. According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoFTA indicator values for the 131 fleet segments indicate that:

- 57% (75 segments) may be in balance with their fishing opportunities.
- 43% (56 segments) may not be in balance with their fishing opportunities.

For 47 (36%) segments, an increasing trend was assessed for RoFTA while a decreasing trend was observed for 67 (51%) segments. For the remaining 17 segments trend could not be calculated.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The number of fleet segments for which the CR/BER indicator is available is 131.

According to the criteria in the 2014 Commission guidelines EWG notes that the CR/BER indicator values for the 131 fleet segments for which balance/out of balance was calculated indicate that:

- 53% (70 segments) may be in balance with their fishing opportunities.
- 47% (61 segments) may not be in balance with their fishing opportunities;

An increasing trend for CR/BER was assessed for 37 (28%) fleet segments while a decreasing trend was observed for 59 (45%) segments. A further 18 (14%) segments had no clear trend and the remaining 17 segments no trend could be calculated.

The Vessel Use Indicator (or Vessel Utilization ratio)

The Vessel Use Indicator (VUR) was available for 194 fleet segments in MBS in 2023. According to the criteria in the 2014 Commission guidelines EWG notes that the VUR indicator values indicate that:

- 45% (87 segments) may be in balance with their fishing opportunities;
- 55% (107 segments) may not be in balance with their fishing opportunities.

An improving trend for the Vessel Use Indicator was assessed for 13 (7%) fleet segments while a deteriorating trend was observed for 19 (10%) segments. No clear trend was found for 114 (59%) segments, 14 (7%) segments showed a flat trend and no trend could be calculated for the remaining 34 segments.

The Inactive Fleet Indicators

The EU inactive fleets in the MBS comprised 6,708 vessels in 2023 representing almost 17% of the vessels registered in the area.

4.3.3 OFR - Other Fishing Regions

Out of 20 active fleet segments in 2023, landings in weight and value were provided for 17 fleet segments or aggregate fleet segments.

Sustainable harvest indicator (SHI)

SHI indicator values were available for 15 segments, of which 10 could be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise more than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 10 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 73% of the total value of the landings in 2023 provided by MS, and all segments may be in balance with their fishing opportunities.

Overall, 2 (20%) segments showed an improving trend and 5 segments did not show clear trend. No trend could be calculated for the remaining 3 segments.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 15 fleet segments, of which 9 segments may not have been in balance with their fishing opportunities in 2023. According to the criteria in the 2024 Commission guidelines, EWG 25-12 notes that the SAR results indicate that there were:

- 1 segment with 5 stocks-at-risk,
- 1 segment with 4 stocks-at-risk,
- 2 segments with 3 stocks-at-risk,
- 2 segments with 2 stocks-at-risk,
- 3 segments with 1 stock-at-risk.

Return on Investment (ROI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI (with value of fishing quota) is available for 2023 in OFR for 2 segments.

According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoI indicator value for 1 segment indicate that they may be in balance with their fishing opportunities and the other one indicate imbalance while both show an improving trend.

RoFTA is available for 11 fleet segments (or clustered fleet segment). According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoFTA indicator values for the 31 segments indicate that:

- 36% (4 segments) may be in balance with their fishing opportunities.
- 64% (7 segments) may not be in balance with their fishing opportunities.

For 4 (36%) segments, an increasing trend was assessed for RoFTA while a decreasing trend was observed for 3 (27%) segments. No trend was found for the 1 segment and no trend could be calculated for the remaining 3 segments.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The number of fleet segments for which the CR/BER indicator is available is 11.

According to the criteria in the 2014 Commission guidelines EWG notes that the CR/BER indicator values for the 11 segments for which balance/out of balance was calculated indicate that:

- 36% (4 segments) may be in balance with their fishing opportunities.
- 64% (7 segments) may not be in balance with their fishing opportunities;

An increasing trend for CR/BER was assessed for 3 (27%) segments while a decreasing trend was observed for 2 (18%) segments. A further 3 (27%) segments had no clear trend and no trend could be calculated for the remaining 3 segment.

The Vessel Use Indicator (or Vessel Utilisation ratio)

The Vessel Use Indicator (VUR) was available for 18 fleet segments in OFR in 2023. According to the criteria in the 2014 Commission guidelines EWG notes that the VUR indicator values indicate that:

- 94% (17 segments) may be in balance with their fishing opportunities;
- 6% (1 segments) may not be in balance with their fishing opportunities.

An increasing trend was observed for 2 segments and a decreasing trend was observed for 2 segments. No clear trend was found for 10 segments and no trend could be calculated for the remaining 4 segments.

The Inactive Fleet Indicators The EU inactive fleets in the OFR comprised 22 vessels in 2023 representing 8% of the vessels registered in the area.

4.3.4 Overview of indicators and trends for each region

Table 4.3.4.1 provides a summary of balance indicators and trends by fishing region.

Table 4.3.4.1 Summary table of balance indicator values for 2023 and trends over the period 2019-2023 at regional level (NAO, MBS and OFR). The number of fleet segments in balance, out of balance or insufficiently profitable with improved, worsened and no trends are shown. For SHI and inactivity indicators, decreasing trends indicate improvement; for economic indicators and VUR, increasing trends indicate improvement.

Supra region	Status	SHI		SAR	CR/BER		RoFTA		RoI		VUR	
	Trend	in balance	out of balance	SAR	in balance	out of balance	in balance	out of balance	in balance	out of balance	in balance	out of balance
NAO	Improving	32	12		34	20	51	24	2	8	5	19
	Deteriorating	3	10		27	43	33	48	9	12	10	0
	Flat/null	0	0		0	0	0	0	0	0	5	0
	No clear trend	47	7		15	18	0	1	0	0	75	113
	No trend calculated	8	6		16	23	16	23	4	19	4	20
NAO TOTAL		90	35	112	92	104	100	96	15	39	99	152
MBS	Improving	15	28		26	11	37	10	1	0	5	8
	Deteriorating	0	1		29	30	32	35	4	5	14	5
	Flat/null	5	0		0	0	0	0	0	0	14	0
	No clear trend	9	10		9	9	0	0	0	0	35	79
	No trend calculated	6	7		6	11	6	11	0	1	19	15
MBS TOTAL		35	46	72	70	61	75	56	5	6	87	107
OFR	Improving	2	0		2	1	2	2	1	1	2	0
	Deteriorating	0	0		1	1	2	1	0	0	2	0
	Flat/null	0	0		0	0	0	0	0	0	0	0
	No clear trend	5	0		1	2	0	1	0	0	10	0
	No trend calculated	3	0		0	3	0	3	0	0	3	1
OFR TOTAL		10	0	9	4	7	4	7	1	1	17	1
Balance result - EU fleet		135	81		166	172	179	159	21	46	203	260
Indicator coverage EU fleet		216		193	338		338		67		463	

Source: own elaborations.

North Atlantic Ocean (NAO)

Out of 125 fleet segments in the NAO for which the SHI could be estimated and meaningfully assessed, 35 segments were *out of balance* and 90 *in balance* with fishing opportunities in 2023. Among the segments for which a trend in SHI could be detected, the situation was improving for 44 segments and worsening for 13. Null or no clear trend could be observed for 68 segments.

According to the economic indicators, about half of the fleet segments in the NAO were *in balance* with their fishing opportunities in 2023; however, overall, the situation appeared to be deteriorating.

The technical indicators imply that the majority of fleet segments were *out of balance* with their fishing opportunities in 2023.

Mediterranean and Black Seas (MBS)

Out of 81 fleet segments in the MBS for which the SHI could be estimated and meaningfully assessed, 46 segments were *out of balance* and 35 *in balance* with their fishing opportunities in 2023. Among the segments for which a trend in SHI could be detected the situation was improving for 43 segments and worsening for 1. Null or no clear trend could be observed for the rest 37 segments.

According to the economic indicators, the majority of fleet segments in the MBS were *in balance* with their fishing opportunities in 2023, however, overall, the situation appeared to be deteriorating.

The technical indicators did not provide a clear overall picture, but the trends show deteriorating trend.

Other fishing regions (OFR)

Values for all indicators could be calculated for only a limited number of fleet segments. Out of 10 fleet segments for which the SHI could be estimated and meaningfully to assessed, all segments were *in balance* with fishing opportunities in 2023. Among the segments for which a trend in SHI could be detected, the situation appeared to be improving for 2 segments. Null or no clear trend was observed for the remaining segments.

For the segments with available economic indicators, the majority were identified as being *out of balance* with their fishing opportunities in 2023. However, the sparse data suggest an improving economic situation overall.

Technical indicators indicate that the vast majority of fleet segments were *in balance* with their fishing opportunities in 2023.

4.4 Task 2 - Indicator Findings – National Sections

Introduction

In this section, the following information is presented for each Member State in response to Task 2 of the terms of reference. Unless specifically mentioned, indicator values are for the reference year 2023 and for the year 2024 for capacity indicators.

Task 2a. Overview of indicator findings: An overview of indicator values by fleet segment is presented and whether according to the guidelines (COM (2014) 545 Final) and COM(2014) 233 Final) and separately for each indicator, such fleet segments are indicated to be “in balance” or “out of balance” with fishing opportunities. Indicator values referred to, are those computed by the EWG 25-12 based on data submitted by Member States under the 2025 fleet economic data call and the most recent assessments and advice for relevant scientific bodies on stock status and exploitation rates. Where applicable, trends in indicator values are also summarised as increasing, decreasing or no clear trend. Since an increasing or decreasing trend indicates an improving or worsening situation depending on the indicator, the trend descriptors increasing and decreasing in the text are written in green (improving situation) or red (worsening situation) font. No clear trend is written in blue font.

A synthesis of indicator values and trends for each Member State is given at the end of each national section.

In addition to the indicators in the Commission guidelines, the Expert group 25-12 has routinely computed values for the EDI and the NOS indicator, following the approach proposed in EWG 18-14 and further proposed in STECF 20-11.

Task 2b. Comparison of indicator values. For each fleet segment, the biological, economic and technical indicator values as computed under task 1 where possible, were compared with the equivalent values and trends in the fleet reports submitted by the Member State under Article 22.2 and 22.3 of Regulation (EU) 1380/2013. Discrepancies between such values were highlighted and where possible the reasons for such discrepancies were identified.

Task 2c. *Assessment of fleet report.* This section provides brief review of the content and findings of the Member State's fleet report and indicates whether the balance indicators are based on DCF information in line with the Commission's guidelines. An assessment by the Expert Group as to whether the analysis of balance between fleet capacity and fishing opportunities is in accordance with the Commission's Guidelines is not given separately by Member State. Such a binary judgement is not informative, because in their assessment of balance, the extent to which the guidelines have been followed by Member States varies, and is dependent not only on the indicator values, but also on additional data and information that may or may not be available to the Expert Group. However, in this section the Expert Group indicates whether a supporting analysis has been provided in cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance with resources (or vice versa).

Task 2d. *Discrepancies in previous fleet reports.* This section notes whether any specific issues with the Member State's fleet report identified in the STECF 24-13 and STECF 24-17 reports, have been addressed in the fleet report submitted by 31 May 2025.

Task 2e. *Structural overcapacity and profitability.* This section assesses whether the Member State's fleet report identifies structural overcapacity and estimates the long-term profitability by fleet segment.

Task 2h. *Overview of action plans.* This section provides a summary overview of the action plans (AP) currently implemented by each Member State and includes the year each AP was launched, if it is a renewal or a new one and identifies the changes between the current AP and its previous version.

Task 2f. *Adjustment targets and tools.* This section assesses whether the new or revised action plans submitted with the fleet reports by 31 May 2025 set out the adjustment targets and tools to achieve a balance and a clear timeframe for its implementation.

Task 2g. *Number of vessels.* This section identifies the number of vessels targeted by each action plan.

4.4.1 Belgium (BEL)

Overview of indicator findings

Area 27

There were 7 fleet segments in the Belgian fleet in 2023, of which 5 were active and one segment comprised only a single vessel for which only data on the Vessel Utilisation indicator was available. Of the 5 active fleet segments, landings and economic data were provided aggregated in 2 fleet segment clusters and 1 fleet segment. The Belgian fishing fleet in 2023 consisted of 65 vessels. Of these, 58 vessels (89%) were active, while 7 vessels (11%) were inactive.

Sustainable Harvest Indicator (SHI)

Out of 5 active fleet segments in 2023, SHI indicator values were available for 3 fleet segments.

The 3 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 100% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (100%) segments were *in balance* with fishing opportunities,

Trends were available for the 3 fleet segments:

- 2 segments displayed *improving* trend,
- 1 segment displayed *no clear* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for all the 3 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 (33%) segment was *in balance* with fishing opportunities,
- 2 (67%) segments were *out of balance* with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments		3		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2	1		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 3 segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (67%) segments were in balance with fishing opportunities,
- 1 (33%) segment was out of balance with fishing opportunities.

Trends were calculated for 3 segments:

- 2 segments displayed an *improving* trend,
- 1 segment displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 3 segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (67%) segments were *in balance* with fishing opportunities,
- 1 (33%) segment was *out of balance* with fishing opportunities.

Trends were calculated for 3 segments:

- 2 segments displayed an *improving* trend,
- 1 segment displayed a *deteriorating* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for 5 segments. In accordance with the Commission guidelines, the EWG notes that values indicate:

- 5 (100%) segments were in balance with fishing opportunities.

Trends were calculated for 5 segments:

- all segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, one fleet segment is indicated to be in balance with fishing opportunities (BEL NAO DTS2440 NGI *) since all indicator values indicate in balance. The other two segments BEL NAO TBB1824 NGI * and BEL NAO TBB2440 NGI are indicated to be out of balance with fishing opportunities with at least one indicator indicating imbalance.

In terms of trends, two segments show increasing values for RoFTA and CR/BER, and a decrease (improvement) in SHI values, while one segment (BEL NAO TBB2440 NGI) shows a decreasing (deteriorating) trend in RoFTA and CR/BER and no clear trend for the SHI.

The analysis of the economic indicators for the Belgian fishing fleet reveals a mixed performance across the three segments. Two segments are indicated to be in balance with fishing opportunities, while one segment, the most important one in terms of numbers of vessels and landings (BEL NAO TBB2440 NGI), is indicated to be out of balance.

The above observations are not completely in line with the assessment of balance in the Member States' fleet report submitted in 2025, where the two most important fleet segments BEL NAO TBB1824 NGI and BEL NAO TBB2440 NGI are assessed as being in balance with

fishing opportunities. No action plan was proposed by the Member State for imbalanced segments.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in table 4.4.1.1.

Table 4.4.1.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance

out of balance

insufficiently profitable

borderline

insufficient data

		Status 2023							Status 2023			
		Economic							Biological		Technical	
Fleet segment/ clustered segment	Nb of vesse ls	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR
BEL NAO DTS2440 NGI*	15						BEL NAO DTS1824 NGI	7				
							BEL NAO DTS2440 NGI	8				
BEL NAO TBB1218 NGI	1						BEL NAO TBB1218 NGI	1				
BEL NAO TBB1824 NGI	15						BEL NAO TBB1824 NGI	15	1			
BEL NAO TBB2440 NGI	27						BEL NAO TBB2440 NGI	27	2			
Total active	58											
Total inactive	7											
% of inactive in total	10.8											

improving

deteriorating

no clear trend

null/flat trend

insufficient data

		Trends 2019-2023							Trends 2019-2023		
		Economic							Biological		Technical
Fleet segment/ clustered segment	Nb of vess els	CR/ BER	RoFTA	ROI	NP margi n	NVA/ FTE	Fleet segment	Nb of vesse ls	SHI	EDI	VUR
BEL NAO DTS2440 NGI*	15						BEL NAO DTS1824 NGI	7			
							BEL NAO DTS2440 NGI	8			
BEL NAO TBB1218 NGI	1						BEL NAO TBB1218 NGI	1			
BEL NAO TBB1824 NGI	15						BEL NAO TBB1824 NGI	15			
BEL NAO TBB2440 NGI	27						BEL NAO TBB2440 NGI	27			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

Indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are compared in Annex II to this report.

Sustainable Harvest Indicator (SHI)

In the MS report, the SHI values were presented for 2015 to 2024. However, the comparison between SHI values reported in the Belgian annual fleet report and those estimated in the framework of EWG 25-12 was only conducted for 2023 and revealed similar outputs for all 3 fleet segments where the SHI was available. The EWG notes that the value of the SHI in the Belgian fleet report was identical to the one estimated in the framework of EWG 25-12 for the segment BEL NAO TBB1824 NGI * only, but that the resulting indicators of balance status of the other two segments was the same.

Indicator trends were not provided in the fleet report. No comparison was possible.

Stocks at Risk Indicator (SAR)

In the MS report, SAR values were presented for 2015 to 2024. As for the SHI, the comparison between SAR values reported in the Belgian annual fleet report and those estimated in the framework of EWG 25-12 was only conducted for 2023 and revealed a similar output for 1 fleet segment (BEL NAO DTS2440 NGI*) where no SAR was identified. In segment BEL NAO TBB1824 NGI*, the MS did not identify a SAR, while EWG 25-12 identified one SAR and in the BEL NAO TBB2440 NGI segment, the MS identified 1 SAR, while EWG 25-12 identified 2 SAR.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed different values of indicator but similar outputs for all of the values. BEL NAO PMP1824 NGI* segment is in balance according to the Belgian fleet report, while in EWG 25-12 estimation this segment was not presented.

Indicator trends were not provided in the fleet report. No comparison was possible.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The comparison between RoFTA reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed some differences in indicator values but the balance status indicated was the same. The BEL NAO PMP1824 NGI* segment is in balance according to the Belgian fleet report, while no information on this segment was available to the EWG, hence no comparison was possible.

Indicator trends were not provided in the fleet report. No comparison was possible.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The comparison between VUR reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed similar outputs for all segments except for the segment BEL NAO DTS2440 NGI* where the segment is out of balance according to the Belgian fleet report, while in EWG 25-12 estimation this segment is in balance. The BEL NAO

PMP1824 NGI* segment is in balance according to the Belgian fleet report, while no information on this segment was available to the EWG, hence no comparison was possible. The BEL NAO DTS2440 NGI * and BEL NAO TBB1824 NGI * segments are in balance according to EWG 25-12 estimations, but these segments were not presented in the Belgian fleet report.

The Inactive Fleet Indicators

The comparison between The Inactive Fleet Indicators reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed different values of indicator but the resulting indicator of balance status was the same.

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted by Belgium provides indicator values separately by fleet segment, based on DCF information and for all the indicators specified in the Commission guidelines COM(2014)545. All fleet segments identified in the report were assessed by the Member State to be “in balance” with fishing opportunities.

The current Belgian management system is considered by the MS to be well functioning in order to secure a balance between fishing opportunities and capacity. The main fleet segments were assessed to be in balance and no action plan is proposed by the Member State.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but the MS considers that nevertheless the fleet segment in question (e.g. SAR for BEL NAO TBB2440 NGI) is in balance, the Member State provides supporting information and analyses.

Discrepancies in previous fleet report

The EWG 24-13 did not highlight any discrepancies between the assessment of balance in its report and the previous Belgian fleet report. Hence, there were no specific issues for the MS to address.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

No structural overcapacity was identified by the MS in the fleet report.

Long-term profitability in the fleet report is identified separately by fleet segment based on the economic indicators specified in the guidelines.

Overview of action plan

No new or revised action plan was proposed.

Adjustment of targets and tools

No new or revised action plan was proposed.

Number of vessels

No new or revised action plan was proposed.

4.4.2 Bulgaria (BGR)

Overview of indicator findings

Area 37

There were 28 fleet segments in the Bulgarian fleet in 2023, of which 24 were active. Of the 24 active fleet segments, landing data were provided for 24 segments while economic data were available to calculate the indicators for 14 aggregated fleet segments. The Bulgarian fishing fleet consisted of 1782 vessels, of which 1102 (61.84%) were active and 680 (38.16 %) were inactive.

Sustainable Harvest Indicator (SHI)

Out of 24 fleet segments active in 2023, SHI indicator values were available for 22 fleet segments.

SHI indicator values for 7 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 15 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 80.46% of the total value of the reported landings in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 6 (40%) fleet segments were *out of balance* with fishing opportunities,
- 9 (60%) fleet segments were *in balance* with fishing opportunities.

Trends could be calculated for 12 segments:

- 12 segments displayed an *improving* trend.

Stocks-at-Risk Indicator (SAR)

The SAR indicator was available for all 24 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 20 (83%) fleet segments were *in balance* with fishing opportunities,
- 4 (17%) fleet segments were *out of balance* with fishing opportunities,
4 segments with 1 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	4	15		1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	16	2	2	2

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 14 segments. In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 10 segments were *in balance* with fishing opportunities,
- 4 segments were *out of balance* with fishing opportunities.

Trends could be calculated for 12 segments:

- 5 segments displayed an *improving* trend,
- 7 segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 14 segments. In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 8 segments were *in balance* with fishing opportunities,
- 6 segments were *out of balance* with fishing opportunities.

Trends could be calculated for 12 segments:

- 3 segments displayed an *improving* trend,

- 8 segments displayed a *deteriorating* trend,
- 1 segment displayed *no clear* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR220 is not analysed here.

VUR was calculated for all 24 segments*. In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 15 segments were *in balance* with fishing opportunities,
- 9 segments were *out of balance* with fishing opportunities.

Trends could be calculated for 19 segments:

- 1 segment displayed an *improving* trend,
- 18 segments displayed *no clear* trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

The status of 24 fleet segments and trends for the Bulgarian fleet in the Black Sea Region is shown below. Based on indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, 18 out of 24 fleet segments are indicated to be out of balance by at least one of the indicators (CR/BER, RoFTA, SAR, SHI, VUR).

Regarding the biological indicators SHI and SAR, 4 and 6 fleet segments respectively are indicated to be out of balance. Two segments, BGR MBS PMP1218 NGI and BGR MBS PMP1824NGI, are indicated to be out of balance by both indicators. Where trends could be calculated, an improving trend for SHI was noted.

Nine fleet segments showed a technical imbalance due to VUR, for all those segments, VUR showed no clear trend.

The economic indicators CR/BER and RoFTA were analysed for the 14 clustered segments. For the 8 out of 14 clustered segments in 2023 the CR/BER and RoFTA indicators show a profitable fishery with the decreasing (worsening) trend for 1 clustered segment over 2019 to 2023. The EWG 25-12 estimates indicate 4 segments (clustered and unclustered) to be out of balance for both economic indicators in 2023. These segments comprise 807 vessels and represent 45% of the total number of active vessels in the fleet in 2023.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.2.1.

Table 4.4.2.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	insufficiently profitable
	bordeline
	insufficient data

Fleet Segment/ clustered segment		Nb of vessels		Status 2023						Status 2023				
				Economic						Biological			Technical	
				CR/BER	RoFTA	ROI				NP margin	NVA/FTE	SAR	SHI	EDI
BGR MBS DFN0006 NGI	342						DFN	VL0006	342					
BGR MBS DFN0612 NGI	433						DFN	VL0612	433	1				
BGR MBS DFN1218 NGI *	20						DFN	VL1218	17					
BGR MBS DFN1218 NGI *							DFN	VL1824	3	1				
BGR MBS FPO0612 NGI *	31						FPO	VL0006	2					
BGR MBS FPO0612 NGI *							FPO	VL0612	29					
BGR MBS HOK0006 NGI	11						HOK	VL0006	11					
BGR MBS HOK0612 NGI	32						HOK	VL0612	32					
BGR MBS PGP0006 NGI	12						PGP	VL0006	12					
BGR MBS PGP0612 NGI *	17						PGP	VL0612	16					
BGR MBS PGP0612 NGI *							PGP	VL1824	1					
BGR MBS PMP0006 NGI	47						PMP	VL0006	47					
BGR MBS PMP0612 NGI	85						PMP	VL0612	85					
BGR MBS PMP1218 NGI *	14						PMP	VL1218	10	1				
BGR MBS PMP1218 NGI *							PMP	VL1824	3	1				
BGR MBS PMP1218 NGI *							PMP	VL2440	1					
BGR MBS PS 0006 NGI *	12						PS	VL0006	11					
BGR MBS PS 0006 NGI *							PS	VL0612	1					
BGR MBS TBB1218 NGI *	11						TBB	VL1218	9					
BGR MBS TBB1218 NGI *							TBB	VL1824	2					
BGR MBS TM 1218 NGI *	19						TM	VL0612	3					
BGR MBS TM 1218 NGI *							TM	VL1218	16					
BGR MBS TM 1824 NGI	6						TM	VL1824	6					
BGR MBS TM 2440 NGI	10						TM	VL2440	10					
Total active	1102													
Total inactive	680													
% of inactive in total	38.16%													

	improving
	deteriorating
	no clear trend
	null/flat trend
	insufficient data
	no data

		Trends 2019-2023								Trends 2019-2023			
		Economic								Biological		Technical	
Fleet Segment/ clustered segment	Nb of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	Nb of vessels	SHI	EDI	VUR	VUR220
BGR MBS DFN0006 NGI	342						DFN	VL0006	342				
BGR MBS DFN0612 NGI	433						DFN	VL0612	433				
BGR MBS DFN1218 NGI *	20						DFN	VL1218	17				
BGR MBS DFN1218 NGI *							DFN	VL1824	3				
BGR MBS FPO0612 NGI *	31						FPO	VL0006	2				
BGR MBS FPO0612 NGI *							FPO	VL0612	29				
BGR MBS HOK0006 NGI	11						HOK	VL0006	11				
BGR MBS HOK0612 NGI	32						HOK	VL0612	32				
BGR MBS PGP0006 NGI	12						PGP	VL0006	12				
BGR MBS PGP0612 NGI *	17						PGP	VL0612	16				
BGR MBS PGP0612 NGI *							PGP	VL1824	1				
BGR MBS PMP0006 NGI	47						PMP	VL0006	47				
BGR MBS PMP0612 NGI	85						PMP	VL0612	85				
BGR MBS PMP1218 NGI *	14						PMP	VL1218	10				
BGR MBS PMP1218 NGI *							PMP	VL1824	3				
BGR MBS PMP1218 NGI *							PMP	VL2440	1				
BGR MBS PS 0006 NGI *	12						PS	VL0006	11				
BGR MBS PS 0006 NGI *							PS	VL0612	1				
BGR MBS TBB1218 NGI *	11						TBB	VL1218	9				
BGR MBS TBB1218 NGI *							TBB	VL1824	2				
BGR MBS TM 1218 NGI *	19						TM	VL0612	3				
BGR MBS TM 1218 NGI *							TM	VL1218	16				
BGR MBS TM 1824 NGI	6						TM	VL1824	6				
BGR MBS TM 2440 NGI	10						TM	VL2440	10				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

A comparison of the indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are given in Annex II to this report. Points of note for each indicator are listed below.

Sustainable Harvest Indicator (SHI)

All SHI values reported in the MS fleet report could be compared with the values calculated by the EWG. For most of the fleet segments, there is a strong difference between the value reported by the MS and those computed by the EWG 25-12. While the MS reports all SHI values to be below one, including those that cannot be assessed meaningfully, the EWG notes that the SHI indicator of ten fleet segments is >1.0, of which six can be assessed meaningfully. Further investigation showed that most of the SHI indicator values reported in Table 25 of the MS fleet report were not computed in accordance with the method for calculation prescribed in the Guidelines. Using the input data provided in Table 25 of the fleet

report, the EWG computed values for the SHI using the correct method for calculation and the resulting values corresponded to those | independently computed by the EWG 25-12.

Stocks at Risk Indicator (SAR)

All SAR indicator values provided in the fleet report matched exactly with the values computed by the EWG.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator for 16 segments was reported in the National Fleet Report and for 14 clustered and unclustered segments in the EWG 25-12 data. The indicator values computed by EWG 25-12 and those in the National Fleet Report are reported for the period 2019-2023. EWG notes that the CR/BER values reported by MS in the Fleet Report and those estimated in the framework of EWG 25-12 are different. However, an imbalance is indicated for four segments both in the fleet report and by the EWG 25-12 (DFNVL0006, DFNVL0612, DFNVL1218, PGPVL0006). Based on the EWG values, two clustered segments FPOVL0612 and PMPVL1218 are indicated as imbalanced but such segments are not provided in the Fleet Report. The EWG 25-12 notes that the reason for the differences may be due to different clustering of segments between the data submitted by the Member State in response to the 2025 fleet economic data call and that used for the fleet report.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The value for 16 segments was reported in the National Fleet Report and for 14 clustered and unclustered segments in the EWG 25-12 data. The indicator values computed by EWG 25-12 and those in the National Fleet Report are reported for the period 2019-2023. The RoFTA values reported in the Fleet Report and those estimated in the framework of EWG 25-12 are the same. However, there are two more segments reported in National Fleet Report: HOKVL0006 and PSVL0006. The EWG 25-12 notes that the reason for the differences may be due to different clustering of segments between the data submitted by the Member State in response to the 2025 fleet economic data call and that used for the fleet report.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The EWG 25-12 note the MS annual fleet report provides values for the VUR calculated according to the Guidelines. The MS based the maximum number of days at sea of a fleet segment on the average of the 10 vessels with the highest activity. Such information is not available to the EWG 25-12, and therefore values between the VUR may differ.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted by Bulgaria provides an analysis of balance between fleet capacity and fishing opportunity of all fleet segments with respect to the economic, biological and technical indicators for the period 2019-2023. The fleet segmentation aligns with the DCF segmentation and the balance assessment is based on the mandatory indicators as provided in the Commission Guidelines.

To assess whether a segment is balanced or imbalanced, the MS categorizes fleet segments in 3 different levels using the following criteria:

- Level 1 = Balanced
Fleet segments with maximum one indicator showing an imbalance
- Level 2 = Imbalanced in the short term
Fleet segments with one indicator showing imbalance, and one or more indicators in “yellow”.
- Level 3 = Imbalanced with excess capacity
Two or more indicators showing an imbalance

The yellow category is used when VUR and RoFTA are in the range of 0.7-0.9 and 0 – TRP, respectively. With TRP being the 5-year average of the risk-free long-term interest rate.

According to these criteria, the MS considers the following four fleet segments as imbalanced in the long term (level 3) in 2023:

- DFN VL0006, DFN VL0612, DFN VL1218 (including DFN1218 and DFN1824), PGP VL0006.

No other segments were classed as out of balance according to the criteria used by the Member State.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information.

Discrepancies in previous fleet reports

Both the structure and the methodology of the 2025 fleet report were similar to last years' fleet report. Unlike the EWG 24-13 report, a comparison between the CR/BER and RoFTA indicators provided in National Fleet Report and those estimated for EWG 25-12 becomes possible due to inclusion of same time series 2019 –2023.

Overview of action plan

The MS considers that the action plan is prepared in accordance with Article 22 of the Regulation (EU) 1380/2013.

The Action Plan consists of 2 major sections. First, a review of the capacity reductions in terms of number of vessels in specific fleet segments with respect to measures implemented in previous years is presented. The second section starts with an overview of the balance between fishing capacity and fishing opportunities for the different fleet segments based on the indicators given in the MS fleet report, and is followed by the action plan which includes a description of the measures and actions planned for 2025 in different subsections.

The proposed action plan is largely a statement of intent to improve the balance of the fisheries sector with its fishing opportunities by:

- cessation of fishing activities
- the improvement of the social and economic status of fishing operators
- support for activities, equipment and innovations aimed at protecting the environment and biodiversity

which will be implemented through specific proposal to be launched in 2025 under the EMFAF work program.

The explanation provided about the planned measures is general and does not give enough information about specific MS actions to balance fleet capacity with fishing opportunities for specific fleet segments. Furthermore, the information on how the actions are to be implemented and the expected effect from such measures on overcapacity in the fleet is not described or assessed.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS makes a distinction between long- and short-term overcapacity for fleet segments based on the number of indicators that indicate imbalance and the value of VUR and RoFTA. According to these criteria, the MS has identified 4 clustered fleet segments as imbalanced in the long term.

Long-term profitability in the fleet report is expressed only through the values for the economic indicators.

Adjustment targets and tools

The EWG notes that no targets and tools are provided in the Action plan. The implementation of the proposed measures according to the Bulgarian action plan appears to be scheduled for 31 May 2026.

Number of vessels

No information is provided in the fleet report or action plan to identify how many vessels are targeted by the action plan.

4.4.3 Croatia (HRV)

Overview of indicator findings

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There were 34 fleet segments in the Croatian fleet in 2023, of which 29 were active. Landings data were provided for 28 segments while economic data were provided by 23 fleet segments. The Croatian fishing fleet in 2023 consisted of 7595 vessels. Of these, 6047 vessels (79.6%) were active, while 1548 (20.4%) were inactive.

Sustainable Harvest Indicator (SHI)

Among the fleet segments active in 2023, landing values were reported for 28 aggregated fleet segments, while SHI indicator values were available for 26.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 12 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The SHI indicator was available for 14 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5 (35.7%) segments were *in balance* with fishing opportunities
- 9 (64.3%) segments were *out of balance* with fishing opportunities

The EWG notes that for the 14 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 79.89% of the total value of the landings in 2023 provided by MS.

Trends could be calculated for 12 fleet segments:

- 4 segments displayed an *improving* trend,
- 8 segments displayed *no clear trend*

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 28 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 8 (28.6%) segments were *in balance* with fishing opportunities
- 20 (71.4%) segments were *out of balance* with fishing opportunities

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2	19	4	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	17	3	2	4

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

There were 28 active fleet segments in the Croatian fleet in 2023. RoI was not calculated.

After clustering, RoFTA values were available for 23 segments.

In accordance with the Commission guidelines, the EWG notes that the values for indicate:

- 10 (43.5%) segments were *in balance* with fishing opportunities
- 13 (56.5%) segments *were out of balance* with fishing opportunities

Trends could be calculated for 21 segments:

- 9 segments displayed an *improving* trend,
- 12 segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 23 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 9 (39.1%) segments were *in balance* with fishing opportunities
- 14 (60.9%) segments were *out of balance* with fishing opportunities

Trends could be calculated for 21 segments:

- 9 segments displayed an *improving* trend,
- 8 segments displayed a *deteriorating* trend
- 4 segments did not show a clear trend

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR220 is not analysed here.

The VUR indicator was available for 29 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 12 (41.4%) segments were *in balance* with fishing opportunities
- 17 (58.6%) segments were *out of balance* with fishing opportunities

Trends could be calculated for 26 segments:

- 2 segments displayed an *improving* trend,
- 5 segments displayed a *flat* trend,

- 19 segments displayed **no clear** trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, most fleet segments are indicated to be out of balance with fishing opportunities. The biological indicators suggest that, around 53% of segments for which a meaningful SHI is available are out of balance. A general trend indicates an improving situation, even if for the most important fleet segments (DTS, PS), there is not a clear trend. Additionally, according to SAR index, most of fleet segments are exploiting stocks at risk, with the exception of FPO, MGO, and PMP.

DFN, DRB, DTS, HOK, PGP and PS fleet segments are indicated to be out of balance.

Some of the most important segments, such as DTS (with the exception of DTS24-40), FPO, PGP, PMP and PS (with the exception of PS12-18) are indicated to be out of balance according to the economic indicators (CR/BER and RoFTA), and the trends suggest a gradual improvement only for some segments (9 out of 21 segments), while a general deterioration is observed for some of the most important segments. In particular, small trawls (<24m) and especially larger purse seines (>18m) consistently show weak economic performance. This is confirmed in the MS report, that highlights the overall economic performance declined in 2023. The MS report also highlights that several SSCF and polyvalent gear segments derive a substantial portion of their income from complementary economic activities (e.g., tourism, agriculture), which are not reflected in the fleet-level revenue data.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.3.1.

Table 4.4.3.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	insufficiently profitable
	bordeline
	insufficient data

		Status 2023							Status 2023				
		Economic							Biological				
Fleet segment/ clustered segment	N° of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment/ clustered segment	N° of vessels	SAR	SHI	EDI	VUR	VUR ₂₂₀
HRV MBS DFN0006 NGI	341						HRV MBS DFN0006 NGI	341	1				
HRV MBS DFN0612 NGI	690						HRV MBS DFN0612 NGI	690	1				
HRV MBS DFN1218 NGI	13						HRV MBS DFN1218 NGI	13	1				
HRV MBS DRB0612 NGI	7						HRV MBS DRB0612 NGI	7	1				
HRV MBS DRB1218 NGI	12						HRV MBS DRB1218 NGI	12	1				
HRV MBS DTS0612 NGI	113						HRV MBS DTS0612 NGI	113	1				
HRV MBS DTS1218 NGI	142						HRV MBS DTS1218 NGI	142	1				
HRV MBS DTS1824 NGI	29						HRV MBS DTS1824 NGI	29	1				
HRV MBS DTS2440 NGI	7						HRV MBS DTS2440 NGI	7	1				
HRV MBS FPO0006 NGI	46						HRV MBS FPO0006 NGI	46					
HRV MBS FPO0612 NGI	123						HRV MBS FPO0612 NGI	123					
HRV MBS HOK0006 NGI	106						HRV MBS HOK0006 NGI	106	1				
HRV MBS HOK0612 NGI *	225						HRV MBS HOK0612 NGI *	225	1				
HRV MBS HOK0612 NGI *	7						HRV MBS HOK0612 NGI *	7	2				
HRV MBS MGO0006 NGI	271						HRV MBS MGO0006 NGI	271					
HRV MBS MGO0612 NGI *	41						HRV MBS MGO0612 NGI *	41					
HRV MBS MGO0612 NGI *	2						HRV MBS MGO0612 NGI *	2					
HRV MBS PGP0006 NGI	2875						HRV MBS PGP0006 NGI	2875	1				
HRV MBS PGP0612 NGI *	792						HRV MBS PGP0612 NGI *	792	1				
HRV MBS PGP0612 NGI *	1						HRV MBS PGP0612 NGI *	1					
HRV MBS PMP0006 NGI *	5						HRV MBS PMP0006 NGI *	5					
HRV MBS PMP0006 NGI *	24						HRV MBS PMP0006 NGI *	24					
HRV MBS PMP0612 NGI *	1						HRV MBS PMP0612 NGI *	1	1				
HRV MBS PMP0612 NGI *	23						HRV MBS PMP0612 NGI *	23					
HRV MBS PMP0612 NGI *	2						HRV MBS PMP0612 NGI *	2	1				
HRV MBS PS0612 NGI	18						HRV MBS PS0612 NGI	18	1				
HRV MBS PS1218 NGI	35						HRV MBS PS1218 NGI	35	1				
HRV MBS PS1824 NGI	37						HRV MBS PS1824 NGI	37	1				
HRV MBS PS2440 NGI	59						HRV MBS PS2440 NGI	59	1				
N° active vessels	6047												
N° of inactive vessels	1548												
% of inactive vessels	80%												

	improving
	deteriorating
	null/flat trend
	insufficient data
	no clear trend
	no data

		Trends 2019-2023							Trends 2019-2023			
		Economic							Biological		Technical	
Fleet segment/ clustered segment	N° of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment/ clustered segment	N° of vessels	SHI	EDI	VUR	VUR ₂₂₀
HRV MBS DFN0006 NGI	341						HRV MBS DFN0006 NGI	341				
HRV MBS DFN0612 NGI	690						HRV MBS DFN0612 NGI	690				
HRV MBS DFN1218 NGI	13						HRV MBS DFN1218 NGI	13				
HRV MBS DRB0612 NGI	7						HRV MBS DRB0612 NGI	7				
HRV MBS DRB1218 NGI	12						HRV MBS DRB1218 NGI	12				
HRV MBS DTS0612 NGI	113						HRV MBS DTS0612 NGI	113				
HRV MBS DTS1218 NGI	142						HRV MBS DTS1218 NGI	142				
HRV MBS DTS1824 NGI	29						HRV MBS DTS1824 NGI	29				
HRV MBS DTS2440 NGI	7						HRV MBS DTS2440 NGI	7				
HRV MBS FPO0006 NGI	46						HRV MBS FPO0006 NGI	46				
HRV MBS FPO0612 NGI	123						HRV MBS FPO0612 NGI	123				
HRV MBS HOK0006 NGI	106						HRV MBS HOK0006 NGI	106				
HRV MBS HOK0612 NGI *	225						HRV MBS HOK0612 NGI *	225				
HRV MBS HOK0612 NGI *	7						HRV MBS HOK0612 NGI *	7				
HRV MBS MGO0006 NGI	271						HRV MBS MGO0006 NGI	271				
HRV MBS MGO0612 NGI *	41						HRV MBS MGO0612 NGI *	41				
HRV MBS MGO0612 NGI *	2						HRV MBS MGO0612 NGI *	2				
HRV MBS PGP0006 NGI	2875						HRV MBS PGP0006 NGI	2875				
HRV MBS PGP0612 NGI *	792						HRV MBS PGP0612 NGI *	792				
HRV MBS PGP0612 NGI *	1						HRV MBS PGP0612 NGI *	1				
HRV MBS PMP0006 NGI *	5						HRV MBS PMP0006 NGI *	5				
HRV MBS PMP0006 NGI *	24						HRV MBS PMP0006 NGI *	24				
HRV MBS PMP0612 NGI *	1						HRV MBS PMP0612 NGI *	1				
HRV MBS PMP0612 NGI *	23						HRV MBS PMP0612 NGI *	23				
HRV MBS PMP0612 NGI *	2						HRV MBS PMP0612 NGI *	2				
HRV MBS PS 0612 NGI	18						HRV MBS PS 0612 NGI	18				
HRV MBS PS 1218 NGI	35						HRV MBS PS 1218 NGI	35				
HRV MBS PS 1824 NGI	37						HRV MBS PS 1824 NGI	37				
HRV MBS PS 2440 NGI	59						HRV MBS PS 2440 NGI	59				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster.

Source: own elaborations.

Comparison of indicator values

Indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are compared in Annex II. Points of note for each indicator are listed below.

Area 37

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report the SHI has been provided for the period 2018-2023 and has, therefore, been made available for the reference year 2023. The comparison between biological indicators reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 shows some discrepancies:

- In the MS report 2025, SHI indicator values were available for all 23 active fleet segments in 2023, compared to 26 reported in the EWG 25-12
- DRB0612, DRB1218, DTS1218 are indicated to be *out of balance* according with EWG 25-12 results, while they were indicated as *in balance* in the national report.
- MS 2025 highlights for the 12 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 75.4% of the total value of the landings in 2023 provided by MS. The EWG 25-12 notes that for the 14 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 79.89% of the total value of the landings in 2023 provided by MS.
- MS report 2025 identified 6 fleet segments (DRB and DTS below 18 m LOA, and FPO segments) *in balance* with fishing opportunities according with SHI index; EWG 25-12 indicates 5 fleet segments to be *in balance* with fishing opportunities: DTS below 12m, FPO, HOK06-12 and 12-18.
- MS report 2025 identified 6 segments (DTS above 18 m LOA and PS above 12 m LOA) *out of balance* with fishing opportunities, due to sustained dependency on overexploited stocks; EWG 25-12 indicates 9 fleet segments *out of balance* with fishing opportunities: DRB, DTS>12m, PS
- According with MS report 2025, the remaining 11 segments (DFN, HOK, MGO, PGP, PMP), SHI values were not considered meaningful as the assessed stocks accounted for less than 40% of total landings.
- Dealing with trends, EWG 25-12 found a positive trend for some segments (e.g. DFN, DRB, FPO) which was not detected in the MS report. The difference in trends may also be affected by the different time scale used to assess trends in biological indicators.

Stocks at Risk Indicator (SAR)

- In the MS report 2025 SAR indicator was evaluated for the 23 fleet segments; according with EWG 25-12 SAR indicator was available for 28 active fleet segments in 2023.
- In the MS report 2025 seven fleet segments (DFN above 12 m LOA, DRB, FPO and MGO) are considered *in balance* with fishing opportunities; according with EWG 25-12, 8 fleet segments are indicated to be *in balance* with fishing opportunities.
- DFN 1218 and DRB are indicated *in balance* in the MS report, and *out of balance* according with EWG 25-12 values;
- EWG 25-12 values indicate PMP below 12 m as *in balance*, but *out of balance* according to the MS fleet report

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator values computed by the EWG and those in the fleet report for were the same for most indicators. The only exception is the DTS 1824 which is *in balance* according to MS report, while it was indicated to be *out of balance* by EWG 25-12 value.

Some minor differences in trends are apparent but are only notable for the FPO, PS12-18 segment.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

Concerning RoFTA index, the EWG 25-12 found a slight positive performance for some fleet segments that indicated not sufficiently profitable in the MS report and *in balance* according to EWG results: DFN0612 and 1218, DTS 2440, HOK 0612, MGO 0612, PS 1218. The HOK06 and PS2440 segments are indicated to be *out of balance* according with EWG 25-12 and *in balance* according to MS fleet report.

The Vessel Use Indicator (VUR)

The comparison between VUR values reported in the MS annual fleet report and those estimated by the EWG 25-12 revealed some differences.

Of the 23 active clustered fleet segments, MS considered 9 to be *in balance* and 14 to be *out of balance*. According to EWG 25-12, 17 segments were indicated to be *out of balance* and 12 *in balance*.

The DTS1824 segment and PS segments less than 8m were assessed as in balance in the MS report and indicated as out of balance by the EWG 25-12 values.

Regarding the trends (from 2013 to 2024) for the MS fleet report outputs were as follows:

- none displayed an *increasing* trend;
- 15 displayed *no significant* trend:
- 8 displayed *flat/null* trend.

Similarly, EWG 25-12 also found flat or unclear trends.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The 2025 Fleet Report presents indicator values either by individual segments or by aggregated clusters, based on DCF data, and covers all indicators specified in the Commission Guidelines (COM (2014) 545). The report is clear, comprehensive, and aligns well with the requirements of the Commission Guidelines.

Fleet segments identified by the Member State as being out of balance with fishing opportunities are clearly indicated in the report.

The national assessment of the overall balance status for each fleet segment, as provided in the Member State's annual fleet report, was primarily based on the available biological

indicators (SHI and SAR) estimated for 2023 and previous years (2013–2023). For segments where SHI or SAR were unavailable or not applicable, technical, economic, and social indicators were used, supplemented by additional information on fleet behaviour.

In the conclusions, the MS considers all segments to be in balance except for Purse Seine segments where the SHI and SAR indicators highlight these segments' continued reliance on overexploited sardine and anchovy stocks, while economic indicators remain weak throughout the segment.

However, the EWG notes that in the conclusions of MS, some segments have been classified as "in balance" even though all indicators are "out of balance". For each of these, the MS has provided a detailed explanation.

The EWG notes that the Member State considers all DTS segments to be currently in balance, based on improving stock status, stable or positive economic and technical indicators, and the full implementation of national and GFCM spatial and temporal management measures (including the Jabuka/Pomo Pit FRA). Recent conclusions of the Subregional Committee for the Adriatic Sea (SRC-AS, May 2025) were used to interpret biological trends, confirming measurable improvements for key demersal stocks (e.g. European hake, red mullet, common sole, deep-water rose shrimp) targeted by the Croatian trawl fleet. These improvements informed the revised status of demersal trawl (DTS) segments.

Discrepancies in previous fleet reports.

EWG 25-12 pointed out a few discrepancies between the Member States' assessments and the EWG' assessment regarding the SHI and SAR indicator. The discrepancies may be related to the difference in the stocks taken into account in computing SAR values. The estimates presented in the MS report appear to be increasingly aligned with those produced by the EWG, and there seems to have been an improvement compared to 2024.

Structural overcapacity and profitability.

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

MS considers that there are some imbalances in its fleet, primarily when compared to the status of the stocks. MS reports that the 2023 economic indicators showed a partial improvement in fleet performance, with most small-scale coastal segments and below-12 m remaining economically viable, while larger-scale fleets, particularly purse seiners, continue to show limited profitability due to high capital costs, lower landings, and partial income reporting. Public financial support is not included in the indicators, possibly underestimating economic sustainability for segments reliant on EMFAF aid. Despite ongoing adjustments and stable fuel prices, the MS considers that these indicators should be interpreted cautiously and not used alone to assess balance.

In 2024, inactive vessels represented 20.5% of the fleet, a 0.6% increase from 2023. Most belong to small-scale segments and do not indicate structural overcapacity, as many are not primarily engaged in commercial fishing. Overall, the inactive fleet indicator does not suggest any imbalance between capacity and fishing opportunities.

Overview of action plans

MS will continue to implement the actions prescribed in the 2023 action plan concerning the imbalance fleet segments. The actions are based on temporary and permanent cessations and completed with supplementary measures. The timeframe and targets are also defined for main actions.

The MS report refers to the action plan established in 2023 for fleet segments assessed as out of balance. The action plan includes the permanent cessation and buyback of specific fishing gears, as well as the continuation of temporary suspensions of fishing activities. It also provides for the implementation of measures established under the GFCM regional management plans for small pelagic and demersal fisheries.

Croatia has initiated the permanent cessation of fishing activities to address overcapacity in key fleet segments, purse seiners (PS) and demersal trawlers (DTS). In 2024, a total of 56 vessels from these segments were withdrawn from the fleet as part of the ongoing capacity reduction measures scheduled for the 2023–2026 period. The highest participation rates were observed in the DTS VL2440 segment (100%) and the PS VL1824 segment (80%), indicating strong engagement and interest from operators in these categories. In contrast, lower participation in certain segments (e.g. PS VL0612 and DTS VL0612) suggests that vessel owners in these groups may still depend on the activity or are less inclined to permanently leave the fishery at this stage.

Croatia also implemented a buy-off scheme in 2024 aimed at the withdrawal of authorisations for selected gear types: shore seines (SB), small purse seines (PS), and hatchets for red coral harvesting. Out of 175 authorised fishing rights in 2023, a total of 127 were withdrawn in 2024, resulting in an overall achievement of 73%.

Adjustment targets and tools.

No new or revised action plans have been submitted by the Member State in 2025.

The measures implemented under the Action Plan, notably permanent cessation and gear buybacks, are expected to enhance both economic and biological balance indicators in the relevant fleet segments. The full impact of these measures is anticipated to further improve balance from 2024 onwards. Croatia stresses that all capacity reduction and gear withdrawal measures under the Action Plan are carried out based on segment-specific balance analyses, vessel characteristics, and their impact on priority stocks. Future measures will be adjusted according to updated assessments to ensure that the adjustments remain both proportional and effective.

Number of vessels

In the summary of action plan submitted by the MS, it is possible to assess the number of vessels target by the permanent cession and buy-off of gears (presented in the tables below). The number of vessels targeted with the temporary session or with the supplementary measures is not stated.

Permanent cession

Progress in implementing permanent cessation of fishing activities by 2024 is given in Table 4.4.3.2.

Table. 4.4.3.2. Implementation of permanent cessation of fishing activities.

Fleet segment		Target as number of vessels to be removed from the fleet	Time frame for implementation	Number of vessels removed from the fleet in 2024	Achievement (%)
DRB	VL0612	5	2025-2027	Not initiated in 2024	
	VL1218	6			
DTS	VL0612	15	2023-2026	6	40
	VL1218	32		13	41
	VL1824	12		8	67
	VL2440	4		4	100
PS	VL0612	5		1	20
	VL1218	7		4	57
	VL1824	15		12	80
	VL2440	15		8	53

Source: Own elaborations.

Buy-off of gears

The expected outcomes of the implementation of the buy-off scheme is summarized in Table 4.4.3.3.

Table. 4.4.3.3. Expected outcomes of the implementation of the buy-off scheme.

Fishing gear		Number of authorisations (2023)	Fishing rights withdrawn (2024)	Achievement (%)
Small purse seines (PS)	PS ciplarica	35	23	66
	PS igličara	4	2	50
	PS oližnica	12	12	100
	PS palamidara	30	6	20
Shore seines (SB)	SB girarica	11	8	73
	SB migavica	52	48	92
	SB oližnica	5	4	80
	SB šabakun	16	15	94
Hatchet for red coral ('red coral vessels')		10	9	90
Total		175	127	73

Source: Own elaborations.

4.4.4 Cyprus (CYP)

Overview of indicator findings

Area 37

There were 11 fleet segments in the Cypriot fleet in 2023, of which 7 were active. Of the 7 active segments, landings data were provided for 7 segments and economic data were provided for 6 segments. The MS presented all indicators for 2023. Indicator values referred

to, are those computed by the EWG 25-12 based on data submitted by Member States under the 2025 fleet economic data call and the most recent assessments and advice for relevant scientific bodies on stock status and exploitation rates. The Cyprus fishing fleet in 2023 consisted of 847 vessels. Of these, 774 vessels (91.4%) were active, while 73 vessels (8.6%) were inactive.

Sustainable Harvest Indicator (SHI)

Out of 7 fleet segments active in 2023, landings in value have been provided aggregated in 7 fleet segments and SHI indicator values were available for 7.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 5 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 2 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 41.38% of the total value of the landings in 2023 provided by MS.

In accordance with the Commission guidelines, the EWG notes that the SHI values for 2023 indicate:

- 1 fleet segment was *out of balance* with fishing opportunities;
- 1 fleet segment was *in balance* with fishing opportunities.

The time series of SHI values for the fleet segments indicated above displayed a null/flat trend for one fleet segment and no trend for another fleet segment.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 7 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 5 (71%) segments were in balance with fishing opportunities;
- 2 (29%) segments were out of balance with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments		1	4	1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%

N of fleet segments	6	1		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for all 6 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (50%) segments were *in balance* with fishing opportunities,
- 3 (50%) segments were *out of balance* with fishing opportunities.

Trends were calculated for the 6 segments:

- 3 (50%) segments displayed an *improving* trend,
- 3 (50%) segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for all 6 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (50%) segments were *in balance* with fishing opportunities,
- 3 (50%) segments were *out of balance* with fishing opportunities.

Trends were calculated for the 6 segments:

- 3 (50%) segments displayed an *improving* trend,
- 1 (17%) segment displayed a *deteriorating* trend,
- 2 (33%) segments displayed *no clear* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were not provided by the MS. VUR₂₂₀ is analysed here.

The VUR₂₂₀ indicator was available for all 7 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 7 (100%) segments were out of balance with fishing opportunities.

Trends could be calculated for 7 segments:

- 1 (17%) segment displayed a *null/flat* trend,
- 6 (83%) segments displayed *no clear* trend.

Synthesis of indicators and trends

According to the criteria in the 2014 Commission guidelines, the EWG notes that in 2023, 4 of 7 segments were indicated to be imbalanced. Based on indicator values for 2023 and according to the criteria in the Commission guidelines, 30% of the fleet segments are indicated to be out of balance with fishing opportunities for biological indicators, while for economic indicators about 50% of fleet segments are indicated to be out of balance. Based on EWG calculations the PG VL0006, PGO VL0612 and PGP VL1218 fleet segments for CR/BER and RoFTA values are indicated to be out of balance. The SAR indicator suggests

imbalance for the PG VL0612 and PGP VL1218 fleet segments. The available trends in CR/BER indicates a deteriorating situation in one segment, 2 segments have no trend and 3 fleet segments are indicated to be improving. Trends in RoFTA are indicated to be improving for 3 segments and deteriorating for 3 segments.

The SHI indicates imbalance in the PGP VL1218 fleet segment.

The above observations are not always in line with the 2023 balance indicator values provided in the Member State's Fleet Report for 2023. The estimates in the fleet report are based on data for three years (2021-2023) for biological indicators, two years (2022 and 2023) for economic indicators and five years (2019-2023) for Vessel Utilisation indicators. The economic indicators for fleet segments PGO VL0006 and PGO VL0612 with limited fishing activities were not calculated by the Member State.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.4.1.

Table 4.4.4.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance

out of balance

insufficiently profitable

borderline

insufficient data

		Status 2023					Status 2023			
		Economic					Biological			Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	SAR	SHI	EDI	VUR
CYP MBS DTS2440 NGI	3									
CYP MBS PG 0006 NGI	24									
CYP MBS PG 0612 NGI	289									
CYP MBS PGO0006 NGI	346									
CYP MBS PGO0612 NGI	81									
CYP MBS PGP1218 NGI	30									
CYP MBS PS 1824 NGI	1									
Total active	774									
Total inactive	73									
% of inactive in total	8.6									

improving

deteriorating

no clear trend

null/flat trend

insufficient data

		Trends 2019-2023					Trends 2019-2023		
		Economic					Biological		Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	SHI	EDI	VUR
CYP MBS DTS2440 NGI	3								
CYP MBS PG 0006 NGI	24								
CYP MBS PG 0612 NGI	289								
CYP MBS PGO0006 NGI	346								
CYP MBS PGO0612 NGI	81								
CYP MBS PGP1218 NGI	30								
CYP MBS PS 1824 NGI	1								

Note1: Vessel Utilization indicators (VUR) were not computed by the EWG although they were provided in the National Fleet Report (see explanation below in section "Comparison of indicator values; The vessel utilization indicator").

Note3: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

A comparison Indicator values computed by the EWG 25-12 and those in the fleet report submitted in May 2025 are given in Annex II. Points of note for each indicator are listed below.

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report the SHI has been provided for the reference year 2023.

The comparison between biological indicators reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 showed the same results.

Indicator values for the SHI were provided for the period 2021-2023 in the fleet report.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report a table with eight species which are defined as SAR (*Alopias vulpinus*, *Merluccius merluccius*, *Pagellus acarne*, *Prionace glauca*, *Sciaena umbra*, *Xiphias gladius*, *Dentex dentex*, and *Epinephelus marginatus*) are reported for the year 2023. The table also reports the fleet segments landing those species with their related landings. Two fleet segments are indicated to be out of balance both in the MS annual report and by the values computed by EWG 25-12 (PG VL0612, and PGP VL1218). However, for PGP VL1218 the EWG 25-12 identified only 1 stock at risk, while the MS annual report identified two stocks at risk (*A. vulpinus* and *X. gladius*)

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the EWG 25-12 report values for CR/BER are available for six fleet segments whereas in the Cyprus fleet report, only four are reported. The MS considers that the indicator is not relevant for the PGO VL0006 and PGO VL0612 segments that are not included in the fleet report, because fishing effort for those segments was limited.

Comparison between CR/BER indicator values reported in the MS annual fleet report and those estimated by the EWG 25-12 could be made for 4 segments only.

Both the PGO VL0006 and PGO VL VL0612 segments are indicated to be out of balance according to the EWG 25-12 estimates for CR/BER, but as there were no separate estimates provided by the MS, no comparison was possible for these segments.

Of the four segments that could be compared, there are differences in the indicator value and status for the PGP VL1218 segment which is indicated to be in balance in the Cyprus fleet report and out of balance according to the EWG values.

No trends analysis could be undertaken as in the fleet report data are available for 2 years only.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the EWG 25-12 report values for RoFTA are available for six fleet segments whereas in the Cyprus fleet report there are only four.

The comparison between RoFTA reported in the MS annual fleet report and those estimated by the EWG 25-12 could be made for 4 segments only. The MS considers that the indicator is not relevant for the PGO VL0006 and PGO VL0612 segments that are not included in the fleet report, because fishing effort for those segments was limited.

Both the PGO VL0006 and PGO VL0612 segments are indicated to be out of balance by according to the EWG 25-12 estimates for RoFTA, but as there were no separate estimates provided by the MS, no comparison was possible for these segments.

Of the four that could be compared, there were differences in the indicator value for PGP VL1218 segment where segment is indicated to be in balance in the fleet report but out of balance according to the EWG value for RoFTA.

No trends analysis could be undertaken as in the fleet report data are available for 2 years only.

Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR₂₂₀)

In the MS annual fleet report the VUR Indicator was calculated as the ratio between days at sea and maximum days at sea for each length group in kW for active and in GT for passive gear.

The maximum number of days at sea was not submitted by MS in response to the 2025 fleet economic data call. Hence a comparison of VUR indicator values could not be undertaken as the EWG was unable to compute values for VUR.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call, are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted in 2025 provides indicator values separately by fleet segment based on DCF information and for the majority of the indicators specified in the Commission guidelines (COM (2014) 545).

Fleet segments that are assessed by the Member State to be “out of balance” with fishing opportunities are clearly identified in the fleet report.

An action plan for fleet segments assessed by the Member State to be “out of balance” has been included in the fleet report since 2020. The fleet report provides a revised action plan relating to one segment (DTS VL2440) only. No action plan is proposed for other fleet segments which according to the indicator values for 2023 computed by EWG 25-12 are indicated to be out of balance. The MS reports that all economic indicators for all fleet segments indicate in balance, although for fleet segments PGO VL0006 and PGO VL0612 indicators were not calculated by MS. Also, the MS states in its fleet report that real economic performance is not negative and concludes that all segments are in balance.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance, the Member State provided analyses in support of their assessment.

Discrepancies in previous fleet reports

The assessment of balance in the Member States' fleet report submitted in 2025 is similar to previous fleet report submitted in 2024. As in previous fleet reports, , the trends of economic indicators calculation is based on two years which cannot be compared with trends reported by the EWG. In the report submitted in 2025, there are still no economic indicator calculations for the PGO VL0006 and PGO VL0612 segments.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are indicated to be out of balance with fishing opportunities.

The MS has indicated when it considers that structural overcapacity exists in the fleet. In the fleet report submitted by 31 May 2025 the DTS VL2440 segment, which is included in the action plan, economic indicators show that this segment is in balance in 2022 and 2023. In the fleet report, no estimates of the long-term profitability (RoI) were given.

Overview of action plans

An action plan has been proposed for the fleet segment DTS VL2440 since the fleet report of the year 2020. The proposed measure is the permanent cessation of fishing activities for two trawlers from a clustered segment total of 3 trawlers operating in the territorial waters of Cyprus should the vessel owners volunteer to decommission their vessels. A time frame of 2 years (until 2023) was given for reaching the target for permanent cessation. If the vessel owners do not voluntarily decommission their vessels, the plan proposes to introduce a mesh size change by replacing the current 50mm diamond mesh codend by a 40 mm square mesh codend in the north-west part of Cyprus. An additional measure that is currently under consideration is a closed area for trawling in the north-west part of Cyprus. Both measures were planned to be applied during 2024.

However, it is noted that the time frame target for permanent cessation has been shifted to 2025, due to delays in the preparation of the methodology to be used for compensating the owners for the permanent cessation. The related time frames for replacing the diamond meshed trawl net at the codend, and for closing an area for trawling, have been moved to 2026.

However, with the data and information provided in the fleet report submitted by Cyprus and the action plan, the EWG 25-12 is unable to determine whether the measures proposed will have any influence on the balance between capacity and fishing opportunities.

Adjustment targets and tools

The revised action plan was submitted with the fleet report by 31 May 2025. If 2 vessels do not volunteer to be decommissioned during 2025, the additional measure consist in increasing the codend mesh size and a closed area to trawling which will come into force in 2026.

Number of vessels

Two vessels are targeted by the action plan.

4.4.5 Denmark (DNK)

Overview of indicator findings

Area 27

There were 46 fleet segments in the Danish fleet in 2023, of which 38 were active. Of the 38 active segments, landings data were provided for 26 fleet segments and economic data were available for 26 clustered fleet segments.

Sustainable Harvest Indicator (SHI)

Out of fleet segments active in 2023, landings in value have been provided aggregated in 26 fleet segments and SHI indicator values were available for 25.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 17 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 8 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 65.99% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 4 fleet segments were *in balance* with fishing opportunities
- 4 fleet segments were *out of balance* with fishing opportunities.

Trends were calculated for 2 segments:

- 1 fleet segment displayed an *improving* trend
- 1 fleet segment displayed a *deteriorating* trend

Stocks at Risk Indicator (SAR)

SAR indicator was available for 26 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values for indicate:

- 10 fleet segments were *in balance* with fishing opportunities
- 16 fleet segments were *out of balance*
 - 3 fleet segments with 4 stocks-at-risk
 - 1 fleet segment with 3 stocks-at-risk
 - 3 fleet segments with 2 stocks-at-risk
 - 9 fleet segments with 1 stocks-at-risk

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	18	6		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	20	3	1	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The ROI indicator was available for 26 clustered segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 segments were *in balance* with fishing opportunities
- 1 segment was *insufficiently profitable*
- 22 segments were *out of balance* with fishing opportunities

Trends were calculated for 6 segments:

- 1 segment displayed an *improving* trend
- 5 segments displayed a *deteriorating* trend

The RoFTA indicator was available for 26 clustered segments. In accordance with the Commission guidelines, the EWG notes that the RoFTA values for 2023 indicate:

- 5 segments were *in balance* with fishing opportunities
- 2 segments were *insufficiently profitable*
- 19 segments were *out of balance* with fishing opportunities

Trends were calculated for 6 segments:

- 1 segment displayed an *improving* trend
- 5 segments displayed a *deteriorating* trend

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 26 segments. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 4 segments were *in balance* with fishing opportunities,
- 22 segments were *out of balance* with fishing opportunities.

Trends were calculated for 6 segments:

- 3 segments displayed a *deteriorating* trend
- 3 segments displayed a *no clear* trend

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The VUR2020 indicator was available for 38 fleet segments. In accordance with the Commission guidelines, the EWG notes that the VUR2020 values for 2023 indicate:

- 7 fleet segments were *in balance* with fishing opportunities
- 31 fleet segments were *out of balance* with fishing opportunities

Trends for VUR220 were calculated for 6 fleet segments:

- 1 fleet segment displayed a *deteriorating* trend
- 5 fleet segments displayed *no clear* trend

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, an overview of the indicators implies that the majority of fleet segments appear to be out of balance for available economic indicators and trends over the period 2019-2023 show a worsening situation.

The SHI indicator in 2023 appears out of balance for over half of the segments and the trend over the period 2019-2023 is improving for one fleet segment and declining for one other segment.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.5.1.

Table 4.4.5.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance

insufficiently profitable

out of balance

borderline

insufficient data

		Economic Indicators										Biological and technical indicators				
		Status 2023										Status 2023				
SR	Clustered segment	No. of vessels	CR/BER	RoFTA	ROI	NP marg	NVA/FT	fs_name	No. of vessels	SAR	SHI	EDI	VUR ₂₂₀			
NAO	DNK NAO DFN0008 NGI *	111						DNK NAO DFN 0008 NGI *	109							
NAO								DNK NAO DTS 0008 NGI *	2							
NAO	DNK NAO DFN0010 NGI *	384						DNK NAO DFN 0010 NGI *	383							
NAO								DNK NAO PGP 0010 NGI *	1							
NAO	DNK NAO DFN0812 NGI *	61						DNK NAO DFN 0812 NGI *	60	2						
NAO								DNK NAO PGP 0812 NGI *	1							
NAO	DNK NAO DFN1012 NGI	21						DNK NAO DFN 1012 NGI	21	1						
NAO	DNK NAO DFN1218 NGI	21						DNK NAO DFN 1218 NGI	21	1						
NAO	DNK NAO DFN1824 NGI	7						DNK NAO DFN 1824 NGI	7	2						
NAO	DNK NAO DRB0010 NGI *	10						DNK NAO DRB 0010 NGI *	8							
NAO								DNK NAO DRB 1012 NGI *	2							
NAO	DNK NAO DRB1218 NGI	27						DNK NAO DRB 1218 NGI	27							
NAO	DNK NAO DTS0010 NGI	34						DNK NAO DTS 0010 NGI	34							
NAO	DNK NAO DTS0812 NGI	8						DNK NAO DTS 0812 NGI	8							
NAO	DNK NAO DTS1012 NGI	22						DNK NAO DTS 1012 NGI	22	1						
NAO	DNK NAO DTS1218 NGI	113						DNK NAO DTS 1218 NGI	113	4						
NAO	DNK NAO DTS1824 NGI	37						DNK NAO DTS 1824 NGI	37	4						
NAO	DNK NAO DTS2440 NGI	26						DNK NAO DTS 2440 NGI	26	3						
NAO	DNK NAO DTS40XX NGI *	3						DNK NAO DRB 40XX NGI *	1							
NAO								DNK NAO DTS 40XX NGI *	1							
NAO								DNK NAO TBB 40XX NGI *	1							
NAO	DNK NAO FPO0008 NGI	134						DNK NAO FPO 0008 NGI	134	1						
NAO	DNK NAO FPO0010 NGI	52						DNK NAO FPO 0010 NGI	52							
NAO	DNK NAO FPO0812 NGI	17						DNK NAO FPO 0812 NGI	17							
NAO	DNK NAO FPO1218 NGI *	4						DNK NAO FPO 1012 NGI *	1							
NAO								DNK NAO FPO 1218 NGI *	3							
NAO								DNK NAO HOK 0010 NGI *	4	1						
NAO	DNK NAO HOK0010 NGI *	6						DNK NAO HOK 1218 NGI *	1							
NAO								DNK NAO HOK 0008 NGI *	1							
NAO	DNK NAO PGP0008 NGI	7						DNK NAO PGP 0008 NGI	7	1						
NAO	DNK NAO TBB1218 NGI	10						DNK NAO TBB 1218 NGI	10	1						
NAO	DNK NAO TBB1824 NGI *	13						DNK NAO TBB 1824 NGI *	12	1						
NAO								DNK NAO TBB 2440 NGI *	1							
NAO	DNK NAO TM 1218 NGI *	7						DNK NAO TM 0010 NGI *	1							
NAO								DNK NAO TM 1218 NGI *	6	1						
NAO	DNK NAO TM 2440 NGI *	6						DNK NAO TM 1824 NGI *	2							
NAO								DNK NAO TM 2440 NGI *	4	2						
NAO	DNK NAO TM 40XX NGI	18						DNK NAO TM 40XX NGI	18	4						

	improving
	null/flat trend
	no clear trend
	deteriorating
	insufficient data
	no data

			Economic Indicators							Biological and technical indicators			
			Trends 2019-2023							Trends 2019-2023			
SR	Clustered segment	No. of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fs_name	No. of vessels	SHI	EDI	VUR	VUR ₂₂₀
NAO	DNK NAO DFN0008 NGI *	111						DNK NAO DFN 0008 NGI *	109				
NAO								DNK NAO DTS 0008 NGI *	2				
NAO	DNK NAO DFN0010 NGI *	384						DNK NAO DFN 0010 NGI *	383				
NAO								DNK NAO PGP 0010 NGI *	1				
NAO	DNK NAO DFN0812 NGI *	61						DNK NAO DFN 0812 NGI *	60				
NAO								DNK NAO PGP 0812 NGI *	1				
NAO	DNK NAO DFN1012 NGI	21						DNK NAO DFN 1012 NGI	21				
NAO	DNK NAO DFN1218 NGI	21						DNK NAO DFN 1218 NGI	21				
NAO	DNK NAO DFN1824 NGI	7						DNK NAO DFN 1824 NGI	7				
NAO	DNK NAO DRB0010 NGI *	10						DNK NAO DRB 0010 NGI *	8				
NAO								DNK NAO DRB 1012 NGI *	2				
NAO	DNK NAO DRB1218 NGI	27						DNK NAO DRB 1218 NGI	27				
NAO	DNK NAO DTS0010 NGI	34						DNK NAO DTS 0010 NGI	34				
NAO	DNK NAO DTS0812 NGI	8						DNK NAO DTS 0812 NGI	8				
NAO	DNK NAO DTS1012 NGI	22						DNK NAO DTS 1012 NGI	22				
NAO	DNK NAO DTS1218 NGI	113						DNK NAO DTS 1218 NGI	113				
NAO	DNK NAO DTS1824 NGI	37						DNK NAO DTS 1824 NGI	37				
NAO	DNK NAO DTS2440 NGI	26						DNK NAO DTS 2440 NGI	26				
NAO	DNK NAO DTS40XX NGI *	3						DNK NAO DRB 40XX NGI *	1				
NAO								DNK NAO DTS 40XX NGI *	1				
NAO								DNK NAO TBB 40XX NGI *	1				
NAO	DNK NAO FPO0008 NGI	134						DNK NAO FPO 0008 NGI	134				
NAO	DNK NAO FPO0010 NGI	52						DNK NAO FPO 0010 NGI	52				
NAO	DNK NAO FPO0812 NGI	17						DNK NAO FPO 0812 NGI	17				
NAO	DNK NAO FPO1218 NGI *	4						DNK NAO FPO 1012 NGI *	1				
NAO								DNK NAO FPO 1218 NGI *	3				
NAO	DNK NAO HOK0010 NGI *	6						DNK NAO HOK 0010 NGI *	4				
NAO								DNK NAO HOK 1218 NGI *	1				
NAO								DNK NAO HOK 0008 NGI *	1				
NAO	DNK NAO PGP0008 NGI	7						DNK NAO PGP 0008 NGI	7				
NAO	DNK NAO TBB1218 NGI	10						DNK NAO TBB 1218 NGI	10				
NAO	DNK NAO TBB1824 NGI *	13						DNK NAO TBB 1824 NGI *	12				
NAO								DNK NAO TBB 2440 NGI *	1				
NAO	DNK NAO TM 1218 NGI *	7						DNK NAO TM 0010 NGI *	1				
NAO								DNK NAO TM 1218 NGI *	6				
NAO	DNK NAO TM 2440 NGI *	6						DNK NAO TM 1824 NGI *	2				
NAO								DNK NAO TM 2440 NGI *	4				
NAO	DNK NAO TM 40XX NGI	18						DNK NAO TM 40XX NGI	18				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stock at risk.

Source: own elaborations.

Comparison of indicator values

A comparison of indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are given in Annex II. Points of note for each indicator are given below.

Sustainable Harvest Indicator (SHI)

In the Denmark annual fleet report, SHI values have been calculated for 24 fleet segments and trends were available for 6 of them. The comparison between SHI indicator reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 was possible for 24 fleet segments. For 11 segments the values and the status matched. For two

segments the values differed but the status matched. For 13 segments the values differed, four of these segments were deemed out of balance by the EWG whereas the MS report no status for two of these and the other two were deemed to be in balance. The two segments with conflicting status were DFN1012 and DTS 2440.

In total EWG 25-12 notes 4 segments with a status of out of balance while the MS report evaluates only one fleet segment out of balance, TM40XX. EWG 25-12 had trends for 2 segments while the MS report included trends for 6 segments. Indicator trends were comparable for 2 segment fleets (DTS2440 and TM40XX) and the results were identical.

Stocks at Risk Indicator (SAR)

In the Denmark annual fleet report, SAR values have been calculated for 25 fleet segments. The comparison between SAR indicator reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 was possible for 25 fleet segments. For 12 segments the values and the status match. For 1 segment the value varies but the status matches. For 12 segments the values and the status do not match with the MS report noting no stocks at risk while the EWG notes these segments having at least one stock at risk.

In total EWG 25-12 notes 16 fleet segments as out of balance while the MS report notes 5 segments as out of balance.

These differences are explained by the stock perimeter and the total reference quantity used for the calculation. The MS report notes how Baltic cod is currently caught under the 10% threshold for inclusion in SAR while the sandeel landings data provided in the MS report are specific to the sandeel management areas and follow the EU sandeel management approach (and not all sandeels caught in the North Sea). Moreover, for other stocks the MS report states that the SAR criteria of a minimum of 10% landings from a stock is calculated in the MS report using fleet landings and the total international landings reported to ICES. EWG 25-12 use the sum of international fleet landings reported to STECF by member states, which may be lower than the (total international) ICES landings. This means that EWG has more fleets fulfilling the 10 % criterion and potentially more SAR species for a fleet segment.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

Both EWG 25-12 and the MS report provided results for 26 fleet segments. Values and status matched for 2 segments. Values matched but no status was provided in the MS report for 8 segments. Values matched for 15 segments, but their status differed (deemed out of balance in EWG while MS reported them as insufficiently profitable). Values did not match for one segment (TM40XX) which was deemed in balance by the EWG whereas its status by the MS was coded yellow in the traffic light table (Table F.7.), denoting insufficient profitability.

In total EWG 25-12 notes 22 fleet segments as out of balance while the MS report assesses only one segment as out of balance for this indicator, DTS0010. For 16 segments the MS assigns a status of insufficiently profitable.

EWG provides trends for 6 segments while the MS fleet report does not provide trends over the period 2019-2023.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

Both EWG 25-12 and the MS report provided results for 26 fleet segments. Values and status matched for 18 fleet segments while for the remaining 8 segments the values matched but no status was provided by the MS.

In total, the EWG 25-12 notes 22 fleet segments as out of balance, one segment as insufficiently profitable and three segments as in balance. The MS report 16 segments as out of balance and two segments as in balance for the RoI indicator.

EWG provides trends for 6 segments while the MS fleet report does not provide trends over the period 2019-2023.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

EWG 25-12 has provided the VUR220 value and status for 38 fleet segments while the MS provides values for 27 segments and the status for 17 segments. The values and status matched for these 16 segments. For 4 segments the values matched but no status was provided in the MS report. For 1 segment the value matched but the status varied (TM40XX deemed in balance by EWG but borderline by MS). For 6 segments the MS reported values for 2024, not 2023. For 11 segments no data was provided in the MS report.

In total, EWG 25-12 notes the VUR220 indicator results as 31 fleet segments out of balance and 7 segments as in balance. The MS report includes VUR estimations and notes 13 segments as out of balance, 3 segments as in balance and 1 segment as borderline.

The values of VUR could not be estimated by EWG 25-12, although they were provided in the Fleet report, due to the lack of data on max days at sea by fleet segment provided in the call for economic data.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted in 2025 provides indicator values separately by fleet segment based on DCF information and for the indicators specified in the Commission guidelines (COM (2014) 545).

The conclusions regarding the analysis of balance between fleet capacity and fishing opportunity for fleet segments are based mainly on the status and trends of the different balance indicators.

The current Danish management system is considered by the MS to be well functioning in order to secure a balance between fishing opportunities and capacity. However, no action plan was proposed for the imbalance fleet segments. According to the economic sustainability indicators, most of the fleet segments did not perform well in either of the two economic indicators. Currently 19 fleet segments out of 26 assessed by EWG 25-12 were out of balance for both RoFTA and CR/BER while another 3 fleet segments were out of balance only for the RoFTA indicator. Also, the assessment shows biological unsustainability since there are 17 fleet segments out of balance with many stocks at risk.

The MS provided a traffic light table for 18 fleet segments and its consideration of balance, which is based off the 2014 guidelines, considers 5 segments to be out of balance (4 segments under 10m and one between 10-12m), 3 segments to be in balance and for the remaining 10 segments no clear assessment can be made.

The EWG notes that in most cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information and analyses.

The Expert group notes that the current fleet report is based on DCF, although some indicator values and trends are missing. The MS report notes that from next year data will be provided on length classes 0-8m and 8-12m when there will be a sufficient time series to provide data on trends.

Discrepancies in previous fleet reports

Some issues identified in previous EWGs remain unresolved. The MS report provides VUR values with tables of data utilised in the estimation of this indicator included in Annex 5 of the fleet report, but the values are not processed by the EWG 25-12 because the maximum days at sea values were not provided to the call for economic data.

This year's MS report seems to provide much more data for segments that correspond with the data provided in EWG 25-12 with note made on further provision of length classes 0-8m and 8-12m from next year.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS annual fleet report identifies imbalance in 2023 for 5 small-scale segments, based on the estimated indicators. The MS report notes that the capacity assessment for each segment, is the assessment of the Danish Ministry of Food, Agriculture and Fisheries, having used the advice of the Danish scientific institutions, for each segment based on the knowledge of the fleet and the calculated technical, biological and economic indicators.

The MS annual fleet report addresses the profitability of each fleet segment based on ROI and CR/BER values. For fleet segments < 24 m with unfavourable ROI and CR/BER values, the MS fleet report explains this by the fact that the realistic income of fishers working in the small-scale fishery is often lower than the standard salary, and that capital costs are often zero.

Overview of action plans

The fleet report does include an action plan with a clear timeframe targeted to specific imbalanced fleet segments. The fleet report discusses some measures to improve the balance of the small-scale fleet, through investments and improved facilities in ports and landing places supporting small-scale fisheries. Such measures were also present in the fleet report submitted in 2022 and 2023 but this year they were further specified.

Adjustment targets and tools

The proposed measures (for small-scale fisheries) do not provide clear adjustment targets and tools, but do provide a clear timeframe. In terms of proposed measures there are two broad areas of action described;

- Projects that support the development of ships' sustainability profile, including transitioning to gentle fishing tools and improvement of energy efficiency.
- Projects that directly improve logistics, catch-handling or infrastructure, which in turn improve quality and sales of the coastal fishermen's stock.

The investment scheme for improvement of the Danish coastal fishing was active from the 1st of May 2024 and closed on the 31st December 2024.

Number of vessels

There were 130 investment commitments given through this scheme but there is no specification of how many vessels benefited from it. Denmark has no current plans for further improvement of the fleet.

There are no specific action plans. The other plans do not provide numbers of vessels targeted, and the report does not explicitly address the specific (out of balance) fleet segments targeted in the plans.

4.4.6 Estonia (EST)

Overview of indicator findings

Area 27

There were 10 fleet segments in the Estonian fleet in 2023, of which 5 were active. Of the 5 active segments, landings data were provided for 4 segments, and economic data were provided aggregated in 3 fleet segments/clusters (2 fleet segments and 1 cluster including 2 fleet segments).

Sustainable harvest indicator (SHI)

Out of 5 fleet segments active in 2023, landings in value have been provided aggregated in 4 fleet segments and SHI indicator values were available for 4.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 1 fleet segment cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG 25-12 notes that the 3 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 85.81% of the total value of the landings in 2023 provided by MS

The SHI indicator was available for 3 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the SHI values for 2023 indicate:

- 0 (0%) segments were *in balance* with fishing opportunities
- 3 (100%) segments were *out of balance* with fishing opportunities

Trends could be calculated for 2 fleet segments:

- 2 (67%) fleet segments displayed an **improving** trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the SAR values for 2023 indicate:

- 1 (25%) segment was **in balance** with fishing opportunities
- 3 (75%) segments were **out of balance** with fishing opportunities:
3 (75%) fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
Nº of fleet segments	0	2	2	0

Economic Dependency Indicator (EDI)

The number of segments by economic dependency level (EDI) are presented in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
Nº of fleet segments	1		1	2

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 3 segments:

The RoFTA indicator was available for 3 active fleet segments or clusters in 2023. In accordance with the Commission guidelines, the EWG notes that the RoFTA values for 2023 indicate:

- 2 (67%) segments were **in balance** with fishing opportunities
- 1 (33%) segment was **out of balance** with fishing opportunities

Trends were calculated for 1 segment:

- 1 (33%) segment displayed an **improving** trend.

RoI was calculated for 3 segments:

The ROI indicator was available for 3 active fleet segments or clusters in 2023. In accordance with the Commission guidelines, the EWG notes that the ROI values for 2023 indicate:

- 3 (100%) segments were **in balance** with fishing opportunities, although 1 (33%) is not sufficiently profitable.

- 0 (0%) segments were **out of balance** with fishing opportunities

Trends were calculated for 1 segment:

- 1 (33%) segment displayed an **improving** trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 3 active fleet segments or clusters in 2023. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 2 (67%) segments were **in balance** with fishing opportunities
- 1 (33%) segment was **out of balance** with fishing opportunities

Trends were calculated for 1 segment:

- 1 (33%) segment displayed an **improving** trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The VUR indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the VUR values for 2023 indicate:

- 2 (50%) segments were **in balance** with fishing opportunities
- 2 (50%) segments were **out of balance** with fishing opportunities

As data required to calculate VUR was not provided in previous data calls, it was not possible to calculate trends for any segment.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, the majority of fleet segments are indicated to be out of balance by at least one indicator (biological, economic or technical).

The most important segment by numbers of vessels (PG VL0008 NGI with 1 043 vessels) is indicated to be out of balance according to the economic indicators, except for NVA/FTE. The SAR indicator suggests that this segment is out of balance, with 1 stock-at-risk (sal.27.32). SHI value cannot be used meaningfully to indicate balance or imbalance of this fleet because the indicator values are based on stocks that comprise less than 40% of the total value of landings.

For the PG VL0812 NGI, the second segment with the highest number of vessels is indicated to be in balance according to the economic indicators. The SHI indicates it is out of balance and the SAR indicates "in balance" (SAR=0). VUR is also indicated to be out of balance for this segment.

No trends analysis could be undertaken for the PG VL0008 NGI and PG VL0812 NGI since data for these segments are only available for 2022 and 2023.

The TM VL2440 NGI* clustered segment is indicated to be in balance for economic variables, showing an improvement in all economic indicators in the period 2019-2023. However, the segment is indicated to be out of balance according to the values for SHI and SAR (1 stock at risk her.27.25-2932).

No data was available for DTS VL40XX IWE segment.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the Table 4.4.6.1

Table 4.4.6.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance

out of balance

insufficiently profitable

borderline

insufficient data

Economic indicators status 2023							Biological and technical indicators status 2023						
Fleet segment/cluster name	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment name	N vessels	SAR	SHI	EDI	VUR	VUR ₂₂₀
EST NAO DTS40XX IWE	3						EST NAO DTS40XX IWE	3					
EST NAO PG 0008 NGI	1043						EST NAO PG 0008 NGI	1043	1				
EST NAO PG 0812 NGI	167						EST NAO PG 0812 NGI	167					
EST NAO TM 2440 NGI *	22						EST NAO TM 1824 NGI	5	1				
							EST NAO TM 2440 NGI	17	1				
Total active	1235												
Total inactive	809												
% of inactive in total	40%												

improving

deteriorating

null/flat trend

insufficient data

no clear trend

Economic indicators trends 2018-2023							Biological and technical indicators trends 2018-2023					
Fleet segment/cluster name	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment name	N vessels	SHI	EDI	VUR	VUR ₂₂₀
EST NAO DTS40XX IWE	3						EST NAO DTS40XX IWE	3				
EST NAO PG 0008 NGI	1043						EST NAO PG 0008 NGI	1043				
EST NAO PG 0812 NGI	167						EST NAO PG 0812 NGI	167				
EST NAO TM 2440 NGI *	22						EST NAO TM 1824 NGI	5				
							EST NAO TM 2440 NGI	17				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

For the calculation of the balance indicators, Estonia followed the Guidelines provided in the European Commission document COM(2014) 545 final of 2 September 2014. The indicators were calculated based on data available on the STECF JRC webpage, specifically the STECF EWG 24-13 – Balance Capacity Indicators.xlsx file, and on information reported under the Data Collection Framework (DCF).

6 indicators have been provided - SHI, SAR, ROI, CR/BR, inactive fleet indicator and vessel utilisation indicator. Biological indicators were provided for the period 2018-2022, economic

indicators were provided for the period 2019-2023, and vessel use indicators for years 2020-2024.

A comparison Indicator values computed by the EWG 25-12 and those in the fleet report are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

Estonia reported the SHI values calculated by the STECF EWG 24-13 for 2018-2022 period, so the comparison with 2023 SHI values calculated by EWG 25-12 was not possible.

Stocks at Risk Indicator (SAR)

Estonia reported the SAR values calculated by the STECF EWG 24-13 for 2018-2022 period, so the comparison with 2023 SAR values calculated by EWG 25-12 was not possible.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed a similar status (in balance) for TM 2440 NGI* cluster, although the values for the indicator were slightly different. The discrepancies are due to the way the indicator is calculated. In the MS fleet report, opportunity costs of capital are excluded from the calculation of the CR/BER whereas the EWG includes the opportunity Costs of capital. Whether to include opportunity costs of capital in the calculation is optional in the guidelines.

In the MS annual fleet report, trends were presented in a chart format and were available for three segments: PG0010, PG1012, and TM1840. The EWG presented a different segmentation for vessel under 12 meters (VL008 and VL0812), so the comparison was not possible for these vessels.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA information was not provided in the MS report.

ROI was calculated by the Member State using a fleet segmentation that differs from the one reported under the Data Collection Framework (DCF), which makes it impossible to compare ROI values for vessels under 12 metres. For the TM 2440 NGI* cluster, the status reported by the Member State matches that computed by EWG 25-12, but the ROI value differs significantly, likely due to the use of a different interest rate in the calculation.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

A different approach has been observed for the calculation of VUR between the MS annual fleet report and the ones estimated in the framework of the EWG 25-12.

In the MS annual fleet report the VUR Indicator was presented for 2020-2024 period (2018-2024 for small coastal fleet) but based on ratio in kW/days (trawls and high seas) and GT/days (small coastal fleet). In this way, a comparison between VUR values for 2023 is not appropriate because the basis for the indicator calculations was different.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted in 2024 provides indicator values specified in the Commission guidelines (COM (2014) 545), separately by fleet segment. However, some indicators are provided in a different segmentation from that reported to DCF. The fleet segments under 12 meters are assessed by the MS but with a different segmentation (PG VL0010 and PG VL1012) to that reported under DCF data calls and used by the EWG 25-12 (PG VL0008 and PG VL0812).

Fleet segments that are assessed by the MS to be “out of balance” with fishing opportunities are clearly identified in the fleet report. No action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but the Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information and analyses.

The biological indicators (SAR and SHI) for 2023 were not calculated by the MS. The values extracted from the STECF JRC web page for the EWG 24-13 report were provided by the MS in the fleet report. In addition, no economic indicators were provided for the high seas fleet segment (DTS VL40XX) due to confidentiality issues.

The economic indicators (RoI and CR/BER) were calculated by the MS based on data for the period of 2018-2023. For technical indicators MS provided data for the period 2020-2024.

The EWG notes that effort variables should be provided by fleet segment instead of cluster segment so the EWG could calculate technical indicators at the segment level.

Discrepancies in previous fleet reports

As in previous reports, the data provided for SAR and SHI are extracted from the STECF JRC webpage as computed by the EWG 24-12 and therefore values for the reference year for this report (2023) were not reported.

The segmentation for vessels under 12 meters presented in the MS report does not correspond to the EWG's segmentation, so it was not possible to compare the indicators.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS declares in the fleet report that “based on the calculations and analysis of the balance indicators presented (..) it can be stated that in general all fleet segments are structurally balanced”. They also state that even though “*structural balance has been achieved and there is some room left for adapting with the changes in stocks* “. Estonia states that their evaluation of balance indicators gives an overall positive assessment of the fleet.

Estonian fisheries management (based on individual transferrable quotas and individual transferrable efforts) is considered by the MS as an effective tool for keeping capacity in structural balance with fishing opportunities, due to economic self-regulation in the Baltic Sea trawling fishery.

Overview of action plan

No new or revised action plans were proposed.

Adjustment of targets and tools

No new or revised action plans have been submitted by the Member State.

Number of vessels

No new or revised action plans have been submitted by the Member State.

4.4.7 Finland (FIN)

Overview of indicator findings

Area 27

There were 14 fleet segments in the Finnish fleet in 2023, of which 8 were active. Of the 8 active segments, landings data and effort variables were provided for eight segments, while economic data was provided for 5 aggregated segments.

Sustainable harvest indicator (SHI)

Out of the 8 fleet segments active in 2023, SHI indicator values were available for 7.

The SHI indicator was available for 7 of the 8 active fleet segments in 2023. In accordance with the Commission guidelines, the SHI indicator values for 3 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 4 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 71.43% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 4 (100%) segments were *in balance* with fishing opportunities
- 0 (0%) segments were *out of balance* with fishing opportunities

Trends were calculated for 3 segments:

- 3 (75%) fleet segments displayed an *improving* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 8 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (37.5%) segments were *in balance* with fishing opportunities

- 5 (62.5%) segments were *out of balance* with fishing opportunities:
- 2 (25%) fleet segments with 2 stocks-at-risk
- 3 (37,5%) fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N° of fleet segments		7		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N° of fleet segments	7			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The ROI indicator was available for 5 aggregated fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the ROI values for 2023 indicate:

- 2 (40%) segments were *in balance* with fishing opportunities
- 3 (60%) segments were *out of balance* with fishing opportunities

Trends could be calculated for the 5 aggregated segments:

- 1 (20%) segment displayed an *improving* trend
- 4 (80%) segments displayed a *deteriorating* trend

The RoFTA indicator was available for 5 aggregated fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the RoFTA values for 2023 indicate:

- 2 (40%) segments were *in balance* with fishing opportunities
- 3 (60%) segments were *out of balance* with fishing opportunities

Trends were calculated for the 5 aggregated segments:

- 2 (40%) segments displayed an *improving* trend
- 3 (60%) segments displayed a *deteriorating* trend

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 5 aggregated fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 2 (40%) segments were *in balance* with fishing opportunities
- 3 (60%) segments were *out of balance* with fishing opportunities

Trends were calculated for the 5 aggregated segments:

- 1 (20%) segment displayed an *improving* trend
- 3 (60%) segments displayed a *deteriorating* trend
- 1 (20%) segment displayed *no clear* trend

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

The VUR indicator was available for 8 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the VUR values for 2023 indicate:

- 6 (75%) segments were *in balance* with fishing opportunities
- 2 (25%) segments were *out of balance* with fishing opportunities

Trends were calculated for the 8 segments:

- 4 (50%) segments displayed an *improving* trend
- 4 (50%) segments displayed *no clear* trend

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on the STECF indicator calculations only one fleet segment, TM40XX, is in balance with its indicators.

Based on the biological indicator values computed by the EWG 25-12, four Finnish segments (NAO TM1218, NAO TM1824 and NAO TM2440 and TM40XX) are indicated be in balance with fishing opportunities (the SHI-values are less than 1 and for 3 segments, the trends are improving). For three of the other four segments the SHI values are not meaningful and it was not possible to compute a value for the fourth. According to the SAR values, three segments are indicated as out of balance.

When considering the economic indicators for 2023, the situation may be interpreted differently. According to the economic indicators the values of CR/BER, RoI, and RoFTA for 2023 all indicate imbalance for one fleet segment and two clusters (PG0008, PG0812*, and TM1218*), and in balance for the segment TM1824 and the cluster TM2440. Two fleet segments and one clustered segment show deteriorating trends for all economic indicators while the clustered segment PG0812* shows an improving trend. TM2440* shows an improving trend for RoFTA, a deteriorating trend for ROI and no clear trend for CR/BER.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.7.1.

Table 4.4.7.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	improving
	deteriorating
	null/flat trend
	insufficient data
	no clear trend
	no data

		Economic trends 2018-2023							Biological and technical trends 2018-2023			
	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	vessel_length	N vessels	SHI	EDI	VUR	VUR ₂₂₀
FIN NAO PG 0008 NGI	907						FIN NAO PG 0008 NGI	907				
							FIN NAO PG 1218 NGI	1				
FIN NAO PG 0812 NGI *	213						FIN NAO PG 0812 NGI	212				
							FIN NAO TM 1218 NGI	12				
FIN NAO TM 1218 NGI *	16						FIN NAO TM 0812 NGI	4				
FIN NAO TM 1824 NGI	7						FIN NAO TM 1824 NGI	7				
							FIN NAO TM 2440 NGI	13				
FIN NAO TM 2440 NGI *	15						FIN NAO TM 40XX NGI	2				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

The balance between the fleet and resources was examined by referring to the indicators defined in the Commission's guidelines COM(2014)545. The conclusion by the MS was that the Finnish fishing fleet and the fishing opportunities are in balance. However, the MS only provided SHI values for three pelagic stocks, rather than fleet segments, and they failed to provide any SAR, economic or technical indicator values. As a result, comparisons with the values computed by the EWG cannot be made. It should also be noted that the SHI values were calculated by the MS for the year 2024, whereas the STECF provided SHI values for the year 2023.

Sustainable harvest indicator (SHI)

SHI for Finnish fleet segments are not included in the MS fleet report which simply notes that, of the stocks for which estimates of F/F_{msy} are available, 2 stocks are considered to be in a good state and the third is in a poor state. The EWG 25-12 estimates of SHI for 5 Finnish fleet segments indicate 3 segments are in balance and for two, the values cannot be considered meaningful.

The MS, in its fleet report, reiterates the comment made in the 2022 fleet report, that the biological indicator (SHI), calculated by EWG 23-13, “was not sufficiently accurate to reflect the situation or current status of the fleet segments concerned”.

No trend was presented for this indicator in the fleet report.

Stocks at Risk Indicator (SAR)

In the Finnish annual fleet report no SAR has been provided for the reference year 2023 or any previous years.

According to the EWG 25-12 values for the SAR indicator, the PG0008 and PG0812 segments have two stocks at risk (cod.27.24-32 and her.27.25-2932 for PG0812 and sal.27.32 and sal.27.22-31 for PG0008). For the segments, TM1218, TM 1824 and TM2440 the EWG 25-12 indicates one stock at risk (her.27.25-2932).

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the Finnish annual fleet report no CR/BER-values have been provided for the reference year 2023 or any previous years.

Consequently, no trend was presented for this indicator.

According to the EWG 25-12 estimations of CR/BER, the segment PG0008, and the clusters PG0812* and TM1218* are indicated to be out of balance. However, the PG0812* cluster showed a positive trend, indicating an improvement in its economic performance over recent years.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the Finnish annual fleet report no ROI or RoFTA values have been provided for the reference year 2023 or any other previous years.

Consequently, no trends were presented for these indicators.

According to the EWG 25-12 estimations of RoFTA and RoI, the segment PG0008, and the clusters PG0812* and TM1218* appear to be out of balance.

The MS in its fleet report points out that “the STECF indicators provide a poor description of the financial situation of vessels in the Finnish fishing fleet, in particular those with a length of less than 12 metres. For economic indicators, the net result in coastal fisheries is affected by the use by STECF of imputed depreciation (capital accumulation method) rather than depreciation in the financial statements.”

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the Finnish annual fleet report no VUR or VUR₂₂₀-values have been provided for the reference year 2023 or any previous years.

Consequently, no trends were presented for these indicators.

According to the EWG 25-12 estimations of VUR, PG0008 and PG0812* appear to be out of balance.

MS, in its fleet report, points out that fleet activity of coastal vessels, measured as vessel utilisation was low, in part due to seasonal ice conditions and the multi-purpose nature of vessel ownership.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call are given separately by Member State in Section 4.1 of this report.

Number of inactive vessels are reported in the Finnish fleet report. However, the Finnish fleet report acknowledges the presence of inactive vessels, especially in the coastal segment.

Assessment of fleet report

The fleet report submitted by Finland provides an analysis of balance between fleet capacity and fishing opportunity. Its conclusions are based mainly on ongoing capacity reductions and compliance with quota regulations, and not on the status and trends of the different balance indicators.

The fleet report submitted by Finland provides some explanations about the segments that the EWG has previously considered to be out of balance. However, the information presented in the Finnish fleet report for 2023 is insufficient to judge the suitability of the Member State's assessment of balance.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but the Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information and analyses.

SHI values were only presented for three pelagic stocks rather than fleet segments. None of the economic or technical indicators requested were presented in the fleet report and no comparison with the indicator values computed by the EWG 25-12 could be made.

Discrepancies in previous fleet reports

EWG 25-12 notes that comments made in previous reports have not been addressed by the MS. The MS has, once again, provided SHI indicator values for three pelagic stocks, rather than for fleet segments. It has also failed to provide indicator values for SAR, or any of the economic or technical indicators.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS has not identified any structural overcapacity in the fleet. The Member State states that the fishing fleet has decreased continuously since 2014. They note that the profitability of the fleet is moderate, however crises experienced between 2020 and 2022 have had a negative impact on this profitability.

The MS states that the national transferrable fishing concessions system (TFC) creates the conditions for improving the profitability of the fishing fleet and reduces unnecessary fishing capacity.

Overview of action plan

No new or revised action plans were proposed.

Adjustment of targets and tools

No new or revised action plans have been submitted by the Member State.

Number of vessels

No new or revised action plans have been submitted by the Member State.

4.4.8 France (FRA)

Overview of indicator findings

There were 87 unclustered fleet segments in the French national fleet, excluding OMR fleet segments, in 2023, of which 76 were active fleet segments. Indicator results are presented below by Supra-region. The French fishing fleet consisted of 4245 vessels, of which 3732 (87.9%) were active and 513 (12.1%) were inactive.

4.4.8.1 Area 27

In the French North Atlantic fleet, there were 55 fleet segments in 2023, of which 49 were active. Of the 49 active segments, landings data were provided for 49 segments and economic data for 31 aggregated fleet segments. The French fishing fleet operating in the NAO consisted of 2872 vessels, of which 2594 (90%) were active and 278 (10%) were inactive.

Sustainable harvest indicator (SHI)

Out of 49 fleet segments active in 2023, SHI indicator values were available for 46.

SHI indicator values for 25 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 21 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 65.46% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 19 (90%) segments were *in balance* with fishing opportunities,

- 2 (10%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 20 fleet segments:

- 4 (20%) segments displayed an *improving* trend,
- 14 (70%) segments displayed *no clear* trend,
- 2 (10%) segments displayed a *deteriorating* trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 49 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 33 (67%) fleet segments were *in balance* with fishing opportunities;
- 16 (33%) fleet segments were *out of balance* with fishing opportunities:
 - 1 segment with 7 stocks-at-risk,
 - 1 segment with 6 stocks-at-risk,
 - 1 segment with 5 stocks-at-risk,
 - 1 segment with 3 stock-at-risk,
 - 3 segments with 2 stocks-at-risk,
 - 9 segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	28	17		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	44		1	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 31 segments: In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 22 (71%) segments were *in balance* with fishing opportunities,
- 9 (29%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 31 segments:

- 20 (65%) segments displayed an improving trend,
- 11 (35%) segments displayed a deteriorating trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 31 segments: In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 19 (61%) segments were in balance with fishing opportunities,
- 12 (31%) segments were out of balance with fishing opportunities.

Trends could be calculated for 31 segments:

- 10 (32%) segments displayed an *improving* trend,
- 7 (23%) segments displayed a *deteriorating* trend,
- 14 (45%) segments displayed *no clear* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 90 (VUR90)

Technical indicator values for VUR were calculated for 49 segments: In accordance with the Commission guidelines, the EWG notes that the VUR values for 2023 indicate:

- 17 (35%) segments were in balance with fishing opportunities,
- 32 (65%) segments were out of balance with fishing opportunities.

Trends could be calculated for 47 segments:

- 5 (11%) segments displayed a *deteriorating* trend,
- 41 (87%) segments displayed *no clear* trend,
- 1 (2%) segment displayed *null/flat trend*.

Technical indicator values for VUR90, which is considered a more appropriate to monitor the activity of French fleet segments operating in NAO area according to the MS, were calculated for 49 segments: In accordance with the Commission guidelines, the EWG notes that the VUR90 values for 2023 indicate:

- 25 (51%) segments were *in balance* with fishing opportunities,
- 24 (49%) segments were *out of balance* with fishing opportunities.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends (Area 27 NAO)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.8.1. below for Area 27.

Table 4.4.8.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	insufficiently profitable
	borderline
	insufficient data

		Status 2023								Status 2023				
		Economic								Biological		Technical		
Fleet Segment/ clustered segment	Nb of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	Nb of vessels	SAR	SHI	EDI	VUR	VUR90
FRA NAO DFN0010 NGI	293						DFN	VL0010	293	2				
FRA NAO DFN1012 NGI	129						DFN	VL1012	129	3				
FRA NAO DFN1218 NGI *	53						DFN	VL1218	53					
FRA NAO DFN1218 NGI *	1						PGO	VL1218	1	1				
FRA NAO DFN1218 NGI *	3						PGP	VL1218	3					
FRA NAO DFN1824 NGI	29						DFN	VL1824	29					
FRA NAO DFN2440 NGI *	31						DFN	VL2440	31	1				
FRA NAO DRB0010 NGI	76						DRB	VL0010	76					
FRA NAO DRB1012 NGI	104						DRB	VL1012	104					
FRA NAO DRB1218 NGI *	91						DRB	VL1218	91					
FRA NAO DRB1218 NGI *	9						DRB	VL1824	9					
FRA NAO DRB1218 NGI *	1						DRB	VL2440	1					
FRA NAO DTS0010 NGI *	67						DTS	VL0010	67					
FRA NAO DTS1012 NGI *	119						DTS	VL1012	119					
FRA NAO DTS1012 NGI *	3						PS	VL1012	3					
FRA NAO DTS1218 NGI	123						DTS	VL1218	123	2				
FRA NAO DTS1824 NGI *	96						DTS	VL1824	96	6				
FRA NAO DTS1824 NGI *	14						MGP	VL1824	14					
FRA NAO DTS2440 NGI *	60						DTS	VL2440	60	7				
FRA NAO DTS2440 NGI *	5						MGP	VL2440	5	1				
FRA NAO DTS40XX NGI *	6						DTS	VL40XX	6	5				
FRA NAO DTS40XX NGI *	3						TM	VL40XX	3					
FRA NAO FPO0010 NGI	264						FPO	VL0010	264					
FRA NAO FPO1012 NGI	77						FPO	VL1012	77					
FRA NAO FPO1824 NGI *	6						FPO	VL1218	6	1				
FRA NAO FPO1824 NGI *	6						FPO	VL1824	6					
FRA NAO HOK0010 NGI	215						HOK	VL0010	215					
FRA NAO HOK1012 NGI	47						HOK	VL1012	47					
FRA NAO HOK2440 NGI *	1						HOK	VL1218	1					
FRA NAO HOK2440 NGI *	3						HOK	VL1824	3					
FRA NAO HOK2440 NGI *	13						HOK	VL2440	13	2				
FRA NAO MGO0010 NGI *	186						MGO	VL0010	186	1				
FRA NAO MGO0010 NGI *	8						MGO	VL1012	8	1				
FRA NAO MGP0010 NGI *	11						MGP	VL0010	11					
FRA NAO MGP1012 NGI *	60						MGP	VL1012	60	1				
FRA NAO MGP1012 NGI *	6						TM	VL1012	6					
FRA NAO MGP1218 NGI *	57						MGP	VL1218	57					
FRA NAO PGO0010 NGI *	90						PGO	VL0010	90					
FRA NAO PGO0010 NGI *	5						PGO	VL1012	5					
FRA NAO PGP0010 NGI	64						PGP	VL0010	64	1				
FRA NAO PGP1012 NGI	15						PGP	VL1012	15					
FRA NAO PMP0010 NGI	35						PMP	VL0010	35					
FRA NAO PMP1012 NGI *	60						PMP	VL1012	60					
FRA NAO PMP1012 NGI *	7						PMP	VL1218	7					
FRA NAO PS 1218 NGI *	23						PS	VL1218	23					
FRA NAO PS 1218 NGI *	1						PS	VL1824	1					
FRA NAO TM 1824 NGI *	9						TM	VL1218	9	1				
FRA NAO TM 1824 NGI *	7						TM	VL1824	7					
FRA NAO TM 1824 NGI *	2						TM	VL2440	2					
Total active	2594													
Total inactive	278													
% of inactive in total	9.68%													

	improving
	deteriorating
	no clear trend
	null/flat trend
	insufficient data
	no data

		Trends 2019-2023								Trends 2019-2023			
		Economic								Biological		Technical	
Fleet Segment/ clustered segment	Nb of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	Nb of vessels	SHI	EDI	VUR	VUR90
FRA NAO DFN0010 NGI	293						DFN	VL0010	293				
FRA NAO DFN1012 NGI	129						DFN	VL1012	129				
FRA NAO DFN1218 NGI *	53						DFN	VL1218	53				
FRA NAO DFN1218 NGI *	1						PGO	VL1218	1				
FRA NAO DFN1218 NGI *	3						PGP	VL1218	3				
FRA NAO DFN1824 NGI	29												
FRA NAO DFN2440 NGI *	31						DFN	VL2440	31				
FRA NAO DRB0010 NGI	76						DRB	VL0010	76				
FRA NAO DRB1012 NGI	104						DRB	VL1012	104				
FRA NAO DRB1218 NGI *	91						DRB	VL1218	91				
FRA NAO DRB1218 NGI *	9						DRB	VL1824	9				
FRA NAO DRB1218 NGI *	1						DRB	VL2440	1				
FRA NAO DTS0010 NGI *	67												
FRA NAO DTS1012 NGI *	119						DTS	VL1012	119				
FRA NAO DTS1012 NGI *	3						PS	VL1012	3				
FRA NAO DTS1218 NGI	123												
FRA NAO DTS1824 NGI *	96												
FRA NAO DTS1824 NGI *	14						DTS	VL1824	96				
FRA NAO DTS2440 NGI *	60						MGP	VL1824	14				
FRA NAO DTS2440 NGI *	5						DTS	VL2440	60				
FRA NAO DTS40XX NGI *	6						MGP	VL2440	5				
FRA NAO DTS40XX NGI *	3						DTS	VL40XX	6				
FRA NAO FPO0010 NGI	264						TM	VL40XX	3				
FRA NAO FPO1012 NGI	77						FPO	VL0010	264				
FRA NAO FPO1824 NGI *	6						FPO	VL1012	77				
FRA NAO FPO1824 NGI *	6						FPO	VL1218	6				
FRA NAO HOK0010 NGI	215						FPO	VL1824	6				
FRA NAO HOK1012 NGI	47						HOK	VL0010	215				
FRA NAO HOK2440 NGI *	1						HOK	VL1012	47				
FRA NAO HOK2440 NGI *	3						HOK	VL1218	1				
FRA NAO HOK2440 NGI *	13						HOK	VL1824	3				
FRA NAO MGO0010 NGI *	186						HOK	VL2440	13				
FRA NAO MGO0010 NGI *	8						MGO	VL0010	186				
FRA NAO MGP0010 NGI *	11						MGO	VL1012	8				
FRA NAO MGP1012 NGI *	60						MGP	VL0010	11				
FRA NAO MGP1012 NGI *	6						MGP	VL1012	60				
FRA NAO MGP1218 NGI *	57						TM	VL1012	6				
FRA NAO PGO0010 NGI *	90						MGP	VL1218	57				
FRA NAO PGO0010 NGI *	5						PGO	VL0010	90				
FRA NAO PGP0010 NGI	64						PGO	VL1012	5				
FRA NAO PGP1012 NGI	15						PGP	VL0010	64				
FRA NAO PMP0010 NGI	35						PGP	VL1012	15				
FRA NAO PMP1012 NGI *	60						PMP	VL0010	35				
FRA NAO PMP1012 NGI *	7						PMP	VL1012	60				
FRA NAO PS 1218 NGI *	23						PMP	VL1218	7				
FRA NAO PS 1218 NGI *	1						PS	VL1218	23				
FRA NAO TM 1824 NGI *	9						PS	VL1824	1				
FRA NAO TM 1824 NGI *	7						TM	VL1218	9				
FRA NAO TM 1824 NGI *	2						TM	VL1824	7				
FRA NAO TM 1824 NGI *							TM	VL2440	2				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

4.4.8.2 Area 37

There were 30 fleet segments in the French Mediterranean fleet in 2023, of which 25 were active. Of the 25 active segments, landings data were available for 25 segments and economic data aggregated by 14 fleet segments. The French fishing fleet operating in the MBS consisted of 1353 vessels, of which 1118 (83%) were active and 235 (17%) were inactive.

Sustainable harvest indicator (SHI)

Out of 25 fleet segments active in 2023, SHI indicator values were available for 21.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 14 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 7 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 67.69% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 4 (57%) segments were in balance with fishing opportunities,
- 3 (43%) segments were out of balance with fishing opportunities.

Trends could be calculated for 7 fleet segments:

- 2 (29%) segments displayed *no clear* trend,
- 2 (29%) segments displayed a *null/flat* trend,
- 3 (43%) segments displayed an *improving* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 25 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 19 (76%) fleet segments were *in balance* with fishing opportunities;
- 6 (24%) fleet segments were *out of balance* with fishing opportunities.
 - 1 segment with 3 stocks-at-risk,
 - 5 segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	17			

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	19	1	1	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 14 segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 13 (93%) segments were *in balance* with fishing opportunities,
- 1 (7%) segment was *out of balance* with fishing opportunities.

Trends were calculated for the 14 segments:

- 6 (43%) segments displayed an *increasing* trend,
- 8 (57%) segments displayed a *decreasing* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 14 segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 13 (93%) segments were *in balance* with fishing opportunities,
- 1 (7%) segment was *out of balance* with fishing opportunities.

Trends for the 14 segments were as follows:

- 3 (21%) segments displayed an *improving* trend,
- 8 (57%) segments displayed a *deteriorating* trend.
- 3 (21%) segments displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 90 (VUR90)

Technical indicator values for VUR were calculated for 25 segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 10 (40%) segments were *in balance* with fishing opportunities,
- 15 (60%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 24 segments:

- 3 (12%) segments displayed an *improving* trend,
- 1 (4%) segment displayed a *deteriorating* trend,
- 18 (75%) segments displayed *no clear* trend,
- 2 (8%) segments displayed *null/flat trend*.

Technical indicator values for VUR90, which is considered a more appropriate to monitor the activity of French fleet segments operating in the MBS area according to the MS, were calculated for 25 segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 8 (32%) segments were *in balance* with fishing opportunities,
- 17 (68%) segments were *out of balance* with fishing opportunities.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends (Area 37, MBS)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.8.2. for Area 37.

Table 4.4.8.2. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	insufficiently profitable
	borderline
	insufficient data

		Status 2023								Status 2023				
		Economic								Biological			Technical	
Fleet Segment/ clustered segment	Nb of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	Nb of vessels	SAR	SHI	EDI	VUR	VUR90
FRA MBS DFN0006 NGI	134						DFN	VL0006	134	1				
FRA MBS DFN0612 NGI	458						DFN	VL0612	458	1				
FRA MBS DTS1824 NGI *	3						DFN	VL1218	3					
FRA MBS DTS1824 NGI *	3						DTS	VL1218	3					
FRA MBS DTS1824 NGI *	22						DTS	VL1824	22					
FRA MBS DTS1824 NGI *	12						HOK	VL1218	12					
FRA MBS DTS1824 NGI *	2						PGP	VL1218	2					
FRA MBS DTS1824 NGI *	1						PS	VL1218	1					
FRA MBS DTS2440 NGI *	25						DTS	VL2440	25					
FRA MBS FPO0006 NGI	64						FPO	VL0006	64	1				
FRA MBS FPO0612 NGI	76						FPO	VL0612	76					
FRA MBS HOK0006 NGI	15						HOK	VL0006	15	1				
FRA MBS HOK0612 NGI	81						HOK	VL0612	81					
FRA MBS PGO0006 NGI	27						PGO	VL0006	27					
FRA MBS PGO0612 NGI	41						PGO	VL0612	41					
FRA MBS PGP0006 NGI	22						PGP	VL0006	22	1				
FRA MBS PGP0612 NGI	82						PGP	VL0612	82	3				
FRA MBS PMP0612 NGI *	7						PMP	VL0612	7					
FRA MBS PS 0612 NGI *	1						DRB	VL0006	1					
FRA MBS PS 0612 NGI *	8						DRB	VL0612	8					
FRA MBS PS 0612 NGI *	7						MGO	VL0612	7					
FRA MBS PS 0612 NGI *	5						PS	VL0612	5					
FRA MBS PS 2440 NGI *	1						PS	VL1824	1					
FRA MBS PS 2440 NGI *	13						PS	VL2440	13					
FRA MBS PS 2440 NGI *	8						PS	VL40XX	8					
Total active	1118													
Total inactive	235													
% of inactive in total	17.37%													

	improving
	deteriorating
	no clear trend
	null/flat trend
	insufficient data
	no data

Fleet Segment/ clustered segment		Nb of vessels		Trends 2019-2023			fishing tech			vessel length			Nb of vessels			Trends 2019-2023			
				Economic												Biological		Technical	
				CR/BER	RoFTA	ROI										NP margin	NVA/FTE	SHI	EDI
FRA MBS DFN0006 NGI	134						DFN	VL0006	134										
FRA MBS DFN0612 NGI	458						DFN	VL0612	458										
FRA MBS DTS1824 NGI *	3						DFN	VL1218	3										
FRA MBS DTS1824 NGI *	3						DTS	VL1218	3										
FRA MBS DTS1824 NGI *	22						DTS	VL1824	22										
FRA MBS DTS1824 NGI *	12						HOK	VL1218	12										
FRA MBS DTS1824 NGI *	2						PGP	VL1218	2										
FRA MBS DTS1824 NGI *	1						PS	VL1218	1										
FRA MBS DTS2440 NGI *	25						DTS	VL2440	25										
FRA MBS FPO0006 NGI	64						FPO	VL0006	64										
FRA MBS FPO0612 NGI	76						FPO	VL0612	76										
FRA MBS HOK0006 NGI	15						HOK	VL0006	15										
FRA MBS HOK0612 NGI	81						HOK	VL0612	81										
FRA MBS PGO0006 NGI	27						PGO	VL0006	27										
FRA MBS PGO0612 NGI	41						PGO	VL0612	41										
FRA MBS PGP0006 NGI	22						PGP	VL0006	22										
FRA MBS PGP0612 NGI	82						PGP	VL0612	82										
FRA MBS PMP0612 NGI *	7						PMP	VL0612	7										
FRA MBS PS 0612 NGI *	1						DRB	VL0006	1										
FRA MBS PS 0612 NGI *	8						DRB	VL0612	8										
FRA MBS PS 0612 NGI *	7						MGO	VL0612	7										
FRA MBS PS 0612 NGI *	5						PS	VL0612	5										
FRA MBS PS 2440 NGI *	1						PS	VL1824	1										
FRA MBS PS 2440 NGI *	13						PS	VL2440	13										
FRA MBS PS 2440 NGI *	8						PS	VL40XX	8										

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

4.4.8.3 OFR

There were 2 segments operating in international waters exclusively (IWE) in 2023, both of which were active. Of the 2 active segments, landings data were available for 1 segment and economic data for 1 fleet segment. The French fishing fleet operating in the OFR, excluding the OMR fishing fleet, consisted of 20 vessels, of which 20 (100%) were active and 0 (0%) were inactive.

Sustainable harvest indicator (SHI)

Out of 2 fleet segments active in 2023, SHI indicator values were available for 1.

The fleet segment for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 100% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the value for 2023 indicates:

- 1 (100%) segment was *in balance* with fishing opportunities,

Trends could be calculated for 1 fleet segment:

- 1 (100%) segment displayed a *flat/null* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 1 active fleet segment in 2023. In accordance with the Commission guidelines, the EWG notes that the SAR value for 2023 indicates:

- 1 (100%) fleet segment was *out of balance* with fishing opportunities;
1 segment with 1 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1			

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments		1		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 1 segment: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicates:

- 1 (100%) segment was *out of balance* with fishing opportunities.

Trends could be calculated for 1 segment:

- 1 (100%) segment displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 1 segment: In accordance with the Commission guidelines, the EWG notes that the value for 2023 indicates:

- 1 (100%) segment was **out of balance** with fishing opportunities.

Trends could be calculated for 1 segment:

- 1 (100%) segment displayed **no clear** trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 90 (VUR90)

Technical indicator values for VUR were calculated for 2 segments: In accordance with the Commission guidelines, the EWG notes that the VUR values for 2023 indicate:

- 2 (100%) segments were **in balance** with fishing opportunities.

Trends could be calculated for 2 segments:

- 1 segment displayed **no clear** trend,
- 1 segment displayed **null/flat trend**.

Technical indicator values for VUR90, which is considered a more appropriate to monitor the activity of French fleet segments operating in NAO area according to the MS, were calculated for 2 segments: In accordance with the Commission guidelines, the EWG notes that the VUR90 values for 2023 indicate:

- 2 (100%) segments were **in balance** with fishing opportunities.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends (Other fishing regions; OFR)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.8.2. for the Other Fishing Regions.

Table 4.4.8.3. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance

out of balance

insufficiently profitable

borderline

insufficient data

		Status 2023										Status 2023				
		Economic										Biological			Technical	
Fleet Segment/ clustered segment	Nb of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	Nb of vessels		SAR	SHI	EDI	VUR	VUR90	
FRA OFR PS 40XX IWE *	1						HOK	VL2440	1	1						
FRA OFR PS 40XX IWE *	19						PS	VL40XX	19							
Total active	20															
Total inactive	0															
% of inactive in total	0															

improving

deteriorating

no clear trend

null/flat trend

insufficient data

no data

		Trends 2019-2023										Trends 2019-2023			
		Economic										Biological		Technical	
Fleet Segment/ clustered segment	Nb of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	Nb of vessels		SHI	EDI	VUR	VUR90	
FRA OFR PS 40XX IWE *	1						HOK	VL2440	1						
FRA OFR PS 40XX IWE *	19						PS	VL40XX	19						

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).

Source: own elaborations.

Status and trends for the French fleet in ALL REGIONS

Based on the indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, 27 out of 49, 9 out of 25 and 2 out of 2 active fleet segments are indicated to be out of balance in the NAO, MBS and OFR (IWE), respectively.

The majority of the imbalanced fleet segments shows an imbalance due to the SAR indicator which indicates imbalance for approximately 30% of all active fleet segments. The SHI could be calculated and meaningfully assessed for approximately 43% of the fleet segments in the NAO, and indicated an imbalance for 2 fleet segments. The ratio of fleet segments for which the SHI indicator could be assessed meaningfully in the MBS supra region is markedly lower, and is only available for 6 out of 25 active fleet segments. For half of these segments, the SHI value was below one. In most cases, the SHI shows no clear trend, or a flat trend. In the NAO and MBS, an improving trend in the SHI indicator was found for 4 and 3 fleet segments, respectively. In the NAO, two fleet segments showed a deteriorating trend.

According to the EWG 25-12 estimated values, the Vessel Utilisation Indicator (VUR) shows an imbalance for the majority of the fleet segments operating in the North Atlantic and

Mediterranean with unclear trends. The VUR90 which measures the activity level of a fleet segment with respect to the 90th percentile of the number of days at sea spend within a segment was adopted by France and was computed by the EWG 25-12 based on the data submitted in the Annex 8A and Days at Sea submitted in the frame of Annual Economic Data Call to the fleet report provides a more optimistic picture. 8 out of 25 and 24 out of 49 fleet segments operating in the Mediterranean and North Atlantic region, respectively, are indicated to be out of balance by the VUR90 indicator. Trends for the VUR90 are not available.

According to the EWG 25-12 estimated values, the economic indicators CR/BER and RoFTA show that most of the French fleet clustered segments are indicated to be in balance with fishing opportunities in Area 27 and Area 37, with often decreasing (worsening situation) trends.

For the Area 27 economic indicators CR/BER and RoFTA were analysed for the 31 clustered segments. For the 19 out of 31 clustered segments in 2023 the CR/BER and RoFTA values indicate profitable fleet segments with a decreasing trend for the 7 clustered segments from 2019 to 2023. The EWG 25-12 estimates indicate that 9 clustered segments comprising 370 vessels were out of balance for both economic indicators in 2023. These segments represent 10% of the total number of active vessels in the fleet in 2023.

For the Area 37 economic indicators CR/BER and RoFTA were analysed for the 14 clustered segments. For the 13 out of 14 clustered segments in 2023 the CR/BER and RoFTA indicators show profitable fishery with the decreasing trend for the 6 clustered segments from 2019 to 2023. The EWG 25-12 estimates show one clustered segment consisted of 25 vessels out of balance for both economic indicators in 2023. This segment represents less than 1% from the total number of active vessels in the fleet in 2023.

For the Other fishing regions (OFR) there was only one clustered segment consisting of 20 vessels which operated in International Waters Exclusively (IWE) in 2023 and both CR/BER and RoFTA indicate the cluster is insufficiently profitable.

Comparison of indicator values

SHI indicator comparisons

A comparison between the indicator values submitted by the MS in Annex 1 of the fleet report and the SHI values computed by the EWG shows good correspondence. Nine fleet segments differ between the MS and EWG in terms of the interpretation of the SHI values with respect to balance / imbalance. Nevertheless, the overall picture across all segments looks similar with the EWG identifying 16 fleet segments with SHI values above one while the MS reports 15 fleet segments SHI values above 1. A notable number of discrepancies (21 out of 76 fleet segments) is also found with respect to whether the SHI indicator can be interpreted meaningfully. In the MS fleet report, the SHI indicator can be interpreted meaningful for 45 fleet segments, with 6 showing an imbalance with respect to the SHI indicator. According the EWG 25-12, the SHI can be interpreted meaningful for only 29 fleet segments with 5 fleet segments being imbalanced.

Differences are likely related to the use of different stock assessments used by the EWG and the MS. In the NAO supra region, a vast majority of the values of the SHI indicator submitted by the MS are lower than the values computed by the EWG. This is likely related to the fact that the MS uses the upper range of F_{MSY} in case it is defined, while the calculation of the EWG is restricted to F_{MSY} .

SAR indicator comparisons

There are major differences between the SAR indicator computed by EWG 25-12 and the SAR values reported by the MS resulting in a disagreement for 18 fleet segments with respect to the SAR indicator. Nevertheless, both the EWG and the MS report 23 fleet segments where the SAR indicator shows a potential imbalance. 14 fleet segments are identified by both the MS and the EWG. The differences are likely related to differences in the list of SAR stocks used by the MS and by the EWG. In Annex 5 to the MS fleet report, a list is of stocks is presented which is based on a subset of the SAR stocks presented in attachment of the EWG 24-13 report. The MS notes that their list, based on the EWG 24-13 report, may differ from the updated list used by EWG 25-12.

Economic indicator comparisons

The comparison between estimated values for EWG and information provided in Annex I of the National Fleet Report was carried out for economic indicators RoFTA and CR/BER. EWG notes that the CR/BER and RoFTA values reported in Annex I of the MS annual fleet report and those estimated in the framework of EWG 25-12 are the same.

The vessel utilization indicator

The comparison between VUR estimated values for EWG 25-12 and information for VUR_max provided in Annex I of the National Fleet Report show the same values. The VUR90 indicator provided by the MS cannot be calculated by the EWG 25-12 from the data collected under the DCF. However, France provided disaggregated fishing effort data at the vessel level in Annex 8A and a description of the methodology in Annex 8B to the fleet report. This data was used by the EWG 25-12 to compute the 90th percentile of the days at sea of a fleet segment, and subsequently to compute the value of the VUR90. A comparison of the VUR90 indicator computed by the EWG 25-12 and the VUR90 indicator presented in the French fleet report revealed differences for 2 fleet segments related to the value of the 90th percentile, however this did not affect the interpretation of the indicator with respect to imbalance.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The indicator values calculated by France are based on data for the years 2021 – 2023. The SHI, SAR, CR/BER, RoFTA have been computed in line with the Commission guidelines COM(2014)545 and COM(2024)223, and an overview of the methods and input data sources is provided in Annex 6 and Annex 1 to the fleet report, respectively.

All fleet segments in the North Atlantic, Mediterranean Sea and Outermost regions follow the segmentation of the DCF. Nevertheless, sub-segments were applied for fleets with an actual imbalance among the DCF segments for the Atlantic and for some of the Mediterranean segments (in particular for eel fishing segments in Atlantic and ‘gangui’ segments in the Mediterranean). The Fleet Report provides the detailed description of the additional

segmentation method in a separate section. The MS argues that this segmentation aligns better with the characteristics of the different fleets.

According to the MS fleet report in 2023, the French fleet comprised 150 segments, of which 124 were active. In Mainland France and other regions (excluding the outermost regions) there were 87 fleet segments of which 11 were inactive in 2023. In Table 11, 14 and the first table of section 3.4 of the fleet report, an overview of the assessment of balance and capacity by fleet segment is provided. Of the 76 active fleet segments, 53 were considered balanced by the MS of which 9 segments required monitoring. 23 fleet segments were partially or fully imbalanced; 12 segments of which 8 partially and 4 fully in the NAO, and 11 segments, all fully imbalanced, in the MBS. In the outermost regions, 45 segments were active of which 32 have been classed as balanced and 13 as imbalanced.

A segment is assessed as balanced if its biological, economic and, as the case may be, technical indicators have all been balanced for at least one of the last three years. Note the French fleet report used alternative biological indicators (EDI and NOS) in its assessment of balance and capacity when the SHI indicator cannot be used meaningfully.

A segment is assessed as imbalanced if one of its indicators has been imbalanced during the last three years, except in the following cases:

- if there is only a technical imbalance according to the VUR in fleets comprising vessels of less than 12 m, this being an indicator which France considers unsuitable irrespective of the calculation method used,
- if there is only an economic imbalance, but this economic imbalance disappears if subsidies are taken into account,
- if the SHI cannot be calculated but the other biological indicators are balanced and offer a series of reassuring signals,
- if the segment is considered to require monitoring by the French authorities based on additional analysis.

The Fleet Report classifies some imbalanced fleet segments as balanced based on additional background information provided in the fleet report. The report states that such fleet segments require additional monitoring. The EWG notes that the rationale for the statement 'requires monitoring' classification is unclear and that a more detailed explanation about what and how is to be monitored is missing.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information.

Discrepancies in previous fleet reports

In response to previous findings regarding discrepancies in the segmentation of the French fishing fleet, the MS has aligned the segmentation with the DCF segmentation for the fleet segments operating in the NAO. This allows to compare the assessment on balance and capacity of the EWG and the MS. However, the MS relies on a spatially disaggregated fleet segmentation for some segments operating in the NAO for the assessment of balance and capacity. A comparison of indicator values for such segments was not undertaken by the EWG.

The National Fleet Report 2025 provides an improved structure of the section that describes the fleet composition. A detailed explanation about the mandatory indicators RoFTA, CR/BER and VUR is also provided as well as a detailed dataset and methodological description of the VUR90 indicator in Annex 8A and 8B. The list of SAR stock has been

updated based on the list of the EWG24-13. Nevertheless, the list is not strictly followed as some stocks are removed based on e.g. indicators of fishing pressure. The National Fleet Report also includes (in the Annex 9A) information for the STECF considering the revision of the Fleet Report guidelines in case of outermost regions.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The EWG 25-12 notes MS fleet report identifies structural overcapacity based only on biological indicators.

The EWG notes that the long-term fleet profitability is not considered by the MS when identifying imbalanced fleet segments.

Overview of action plan

The activities from the previous year's Action plans are summarised and presented in the Annex 3 of the fleet report. The new Action plan provided in the Annex 5, referred to as Annex 4 in the Fleet report 2025 is an update and continuation from the 2016, 2018, 2019, 2020, 2021, 2022 and 2023 action plans. It includes 11 DCF fleet segments and an ad hoc segment exploiting eel that includes vessels from various DCF segments in the Mediterranean and 5 DCF fleet segments and an ad hoc segment exploiting eel that includes vessels from 7 DCF fleet segments in the Atlantic areas that were assessed by the MS to be out of balance. Four fleet segments operating in the Atlantic are new in the Action plan of 2025, and one DCF segment is added to the eel segment in the Atlantic.

The action plan contains a wide range of general as well as more specific measures for the fleet segments.

For the fleet segments that have been added to the Action plan of 2025. For all these segments measures are taken that aim a capacity reduction by a ban on new vessel entering the fleet segments without removal of equivalent capacity. For some of the segments more specific measures are proposed including technical measures in the edible crab fishery (FRA NAO FPO1012 NGI, FRA NAO FPO1824 NGI) and science-based management measures based in the whelk fishery (NAO FPO1012 NG).

Adjustment targets and tools

Table 4.4.8.4. show the proposed measures in the action plan. The proposed measures in the action plan describe clear targets as well as actions to be taken to restore the imbalance of fleet segments operating in the North Atlantic and Mediterranean Sea without clear timeframe.

Table 4.4.8.4. Proposed measures in the action plan.

Fleet Segments from previous Action Plans	Additional fleet segments included in the Action plan in 2025 Report	Number of vessels in the segment concerned in 2023
	FRA NAO DTS2440 NGI (West of Scotland- Celtic Sea and Irish Seas - Iceland)	47
	FRA NAO FPO1012 NGI (West of Scotland- Celtic Sea and Irish Seas - Iceland)	35
	FRA NAO FPO1012 NGI (North Sea and Eastern English Channel)	29
	FRA NAO DFN1012 NGI (North Sea and Eastern English Channel)	16
FRA NAO DFN0010 NGI FRA NAO FPO0010 NGI FRA NAO MGO0010 NGI FRA NAO MGO1012 NGI FRA NAO PGO0010 NGI FRA NAO DTS0010 NGI	FRA NAO PGO1218 NGI	414

Source: Own elaborations.

The plans to restore a sustainable balance between fishing capacity and fishing opportunities in the imbalanced segments will primarily comprise the following measures:

- capacity ceilings and fleet exit plans for imbalanced segments;
- improving scientific knowledge to better understand the factors driving the population dynamics of sole and whelk;
- technical measures including temporal closures and minimum landing sizes.

Number of vessels

Table 4.4.8.5 shows the number of vessels per fleet segment concerned in the action plan. The action plan submitted by the MS concerns a total of 827 vessels.

Table 4.4.8.5. Number of vessels per fleet segment concerned.

Description of fleet segment	Number of vessels in 2023

FRA MBS DTS1218 NGI FRA MBS DTS1824 NGI FRA MBS DTS2440 NGI	50
FRA MBS FPO0006 NGI FRA MBS FPO0612 NGI	75
FRA MBS DFN0006 NGI	46
FRA MBS HOK0006 NGI	5
FRA MBS PGP0006 NGI FRA MBS PGP0612 NGI	37
FRA MBS DRB0612 NGI	1
Other vessels exploiting eel (including those in the eel sub-segment) but which are part of balanced DCF segments.	41
FRA MBS MGO0612 NGI	7
FRA NAO PS_1218 NGI	23
FRA NAO DFN1012 NGI	16
FRA NAO DTS2440 NGI	47
FRA NAO FPO1012 NGI	35
FRA NAO FPO1012 NGI	29
FRA NAO FPO1824 NGI	1
Ad hoc segment AT ELE eel VL0024, which includes part of the following segments: FRA NAO DFN0010 NGI FRA NAO FPO0010 NGI FRA NAO MGO0010 NGI FRA NAO MGO1012 NGI FRA NAO PGO0010 NGI FRA NAO PGO1218 NGI FRA NAO DTS0010 NGI	414

Source: Own elaborations.

4.4.9 Germany (DEU)

Overview of indicator findings

Area 27

There were 30 fleet segments in 2023, of which 22 were active. Of the 22 active segments, landings data were provided for 15 fleet segments and economic data for 15 fleet segments. The German fishing fleet in 2023 consisted of 1138 vessels. Of these, 838 vessels (73.6%) were active, while 300 vessels (26.4%) were inactive.

Sustainable harvest indicator (SHI)

Out of 22 fleet segments active in 2023, landings in value have been provided aggregated in 15 fleet segments and SHI indicator values were available for 15.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 5 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 10 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 77.76% of the total value of the landings in 2023 provided by MS.

In accordance with the Commission guidelines, the EWG notes that the SHI values for 2023 indicate:

- 3 (30%) fleet segments were **out of balance** with fishing opportunities;
- 7 (70%) fleet segments were **in balance** with fishing opportunities.

The time series of SHI values for the fleet segments indicated above displayed:

- 7 (70%) fleet segments displayed an **improving** trend,
- 1(10%) fleet segment displayed a **deteriorating** trend,
- 2 (20%) fleet segments displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 15 active fleet segments in 2023.

In accordance with the Commission guidelines, the EWG notes that the SAR values for 2023 indicate:

- 9 (60%) segments were in balance with fishing opportunities;
- 6 (40%) segments were out of balance with fishing opportunities (1 with 7 stocks-at-risk; 1 fleet segment with 2 stocks-at-risk; 4 fleet segments with 1 stock-at-risk).

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	6	8	1	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	12		2	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for all 15 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the RoFTA values for 2023 indicate:

- 3 (20%) segments were **in balance** with fishing opportunities,
- 12 (80%) segments were **out of balance** with fishing opportunities.

Trends were calculated for 15 segments:

- 9 (60%) segments displayed an **improving** trend,
- 6 (40%) segments displayed a **deteriorating** trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for all 15 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 3 (20%) segments were **in balance** with fishing opportunities,
- 12 (80%) segments were **out of balance** with fishing opportunities.

Trends were calculated for 15 segments:

- 9 (60%) segments displayed an **improving** trend,
- 5 (33%) segments displayed a **deteriorating** trend,
- 1 (7%) segment displayed a **no clear** trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

The VUR indicator was available for all 23 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the VUR values for 2023 indicate:

- 10 (43%) segments were **in balance** with fishing opportunities,
- 13 (57%) segments were **out of balance** with fishing opportunities.

Trends for the 21 segments were as follows:

- 1 (5%) segment displayed an **improving(improving)** trend,
- 5 (24%) segments displayed a **deteriorating** trend,
- 15 (71%) segments displayed **no clear** trends.

*The VUR value calculated for an aggregate segment (cluster) is applied to all the fleet segments in the cluster.

Area OFR

There was 1 fleet segment active in in the OFR in 2023. Landings data were provided separately for the for this fleet segment, but the segment was included in the clustered segment DEU NAO TM40XXNGI so separate balance indicators for the OFR segments were not available.

Sustainable harvest indicator (SHI)

There was 1 fleet segment active in 2023, landings in value have been provided aggregated in 1 fleet segments and SHI indicator values were available for 1. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 1 fleet segment was **in balance** with fishing opportunities.

Stocks at Risk Indicator (SAR)

No SAR species were found for this fleet segment.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 15 segments. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 12 segments were **out of balance** with fishing opportunities.
- 3 segments were **in balance** with fishing opportunities.

Trends were calculated:

- 9 segments displayed an **improving** trend.
- 6 segments displayed a **deteriorating** trend

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 15 segments. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 3 segments were **out of balance** with fishing opportunities.
- 12 segments were **in balance** with fishing opportunities.

Trends were calculated:

- 9 segments displayed an **improving** trend.
- 5 segments displayed a **deteriorating** trend
- 1 segment displayed **no clear** trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for the 1 segment: In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 1 segment was **out of balance** with fishing opportunities.

Trends were as follows:

- 1 segment displayed an **improving** trend.

Synthesis of indicators and trends

According to the criteria in the 2014 Commission guidelines, the EWG notes that in 2023 all 15 clustered segments are indicated as imbalanced. Based on biological indicator values (SHI and SAR) for 2023 and trends over the period 2019 to 2023 and in accordance with the criteria in the Commission guidelines, less than half fleet segments are indicated to be out of balance with fishing opportunities and where trends in SHI can be computed, 7 of them indicate an improving situation, 1 segment is decreasing and 2 segments displayed no clear trends.

The EWG indicator values for CR/BER indicate that the DFN VL2440, DTS40XX and TBB VL2440 segments are in balance, while the CR/BER values for other segments are indicated to be out of balance. The outcomes are the same for and RoFTA. The available trends for CR/BER mostly show an improving situation, although DTS VL40XX segment has no trend, while DTS VL1218, DTS VL1824, DTS VL2440, TBB VL1012 and TBB VL2440 segments show a deteriorating trend. The trends in RoFTA are deteriorating for 6 fleet segments and are improving for 9 segments. 8 segments were indicated to be out of balance according to the technical indicator (VUR).

Due to changes in segmentation for small-scale fisheries (new segments VL0008 and VL0812) which introduced for the Baltic Sea region since 2021, the trend was calculated based on 2021-2023 period only.

The status of each indicator as computed by EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in 4.4.9.1. below.

Table 4.4.9.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance	insufficiently profitable
	out of balance	bordeline
		insufficient data

Fleet segment/ clustered segment		Nb of vessels		Status 2023			Fleet segment		Nb of vessels		Status 2023			
				Economic							Biological		Technical	
				CR/BER	RoFTA	ROI					NP margin	NVA/FTE	SAR	SHI
DEU NAO DFN2440 NGI *	10						DEU NAO DFN1218	4						
							DEU NAO DFN2440	2						
							DEU NAO FPO1824	3						
							DEU NAO FPO2440	1						
DEU NAO DTS0812 NGI *	8						DEU NAO DTS0812	8						
DEU NAO DTS1218 NGI	16						DEU NAO DTS1218	16						
DEU NAO DTS1824 NGI	8						DEU NAO DTS1824	8						
DEU NAO DTS2440 NGI	10						DEU NAO DTS2440	10	2					
DEU NAO DTS40XX NGI	4						DEU NAO DTS40XX	4	7					
DEU NAO PG0008 NGI A *	79						DEU NAO PG0010	3						
							DEU NAO PG0008	76						
							DEU NAO PG0010	3						
DEU NAO PG0008 NGI L *	413						DEU NAO PG0008	410	1					
DEU NAO PG0812 NGI A *	54						DEU NAO PG0812	54	1					
DEU NAO PG0812 NGI L *	79						DEU NAO PG0812	79	1					
DEU NAO TBB1012 NGI *	7						DEU NAO TBB0010	5						
							DEU NAO TBB1012	2						
							DEU NAO TBB1218	81						
DEU NAO TBB1218 NGI	81						DEU NAO TBB1824	60						
DEU NAO TBB1824 NGI	60													
DEU NAO TBB2440 NGI *	5						DEU NAO TBB2440	3						
							DEU NAO TBB40XX	2	1					
							DEU NAO TM40XX	3						
DEU NAO TM40XX NGI *	4						DEU OFR TM40XX	1						
Total active	838													
Total inactive	300													
% of inactive in total	26.4													

		improving	null/flat trend								
		deteriorating	insufficient data								
			no clear trend								
Trends 2019-2023							Trends 2019-2023				
Economic											
									Biological		Technical
Fleet segment/ clustered segment	Nb of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment	Nb of vessels	SHI	EDI	VUR
DEU NAO DFN2440 NGI *	10						DEU NAO DFN1218	4			
							DEU NAO DFN2440	2			
							DEU NAO FPO1824	3			
							DEU NAO FPO2440	1			
DEU NAO DTS0812 NGI *	8						DEU NAO DTS0812	8			
DEU NAO DTS1218 NGI	16						DEU NAO DTS1218	16			
DEU NAO DTS1824 NGI	8						DEU NAO DTS1824	8			
DEU NAO DTS2440 NGI	10						DEU NAO DTS2440	10			
DEU NAO DTS40XX NGI	4						DEU NAO DTS40XX	4			
DEU NAO PG0008 NGI A*	79						DEU NAO PG0010	3			
							DEU NAO PG0008	76			
DEU NAO PG0008 NGI L*	413						DEU NAO PG0010	3			
							DEU NAO PG0008	410			
DEU NAO PG0812 NGI A*	54						DEU NAO PG0812	54			
DEU NAO PG0812 NGI L*	79						DEU NAO PG0812	79			
DEU NAO TBB1012 NGI *	7						DEU NAO TBB0010	5			
							DEU NAO TBB1012	2			
DEU NAO TBB1218 NGI	81						DEU NAO TBB1218	81			
DEU NAO TBB1824 NGI	60						DEU NAO TBB1824	60			
DEU NAO TBB2440 NGI *	5						DEU NAO TBB2440	3			
							DEU NAO TBB40XX	2			
DEU NAO TM40XX NGI *	4						DEU NAO TM40XX	3			
							DEU OFR TM40XX	1			

*Note1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is indicated in the table with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster.*

Note2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster.

Source: Own elaborations

Comparison of indicator values

A comparison Indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the MS annual fleet report, the SHI has been provided for the reference year 2023.

The comparison between SHI reports in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed similar outputs for ten fleet segments (PG VL0812A, PG VL0812L, TM VL40XX, TBB VL2440, DFN VL2440, DTS VL0812, DTS VL1218, DTS VL1824, DTS VL2440 and DTS VL40XX). A discrepancy was observed for DFN VL1218 and

TBB VL40XX that were assessed “out of balance” and “in balance” respectively in the MS report, while the EWG 25-12 did not calculate the SHI for such fleet segments.

The comparison between SHI trends reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed similar outputs, showing a general improvement over time of this indicator.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR has been provided for the reference year 2023.

The comparison between SAR reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed similar outputs for 14 fleet segments. An exception is DFN VL1218, for which EWG 25-12 did not compute an estimate for SAR, while in the MS annual report it was assessed to be “in balance”.

For DTS VL1824, the SAR indicator values computed by the EWG 25-12 indicated the segment to be “in balance”, while in the MS annual report it was assessed as “out of balance” (1 SAR species in 2023).

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparisons between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed similar outputs for all values.

The trends are similar to those computed by the EWG 25-12.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

As for the Return on Fixed Tangible Assets (RoFTA) indicator, the comparisons between values reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed similar outputs for all values.

The trends are similar to those computed by the EWG 25-12.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the MS annual fleet report, the VUR Indicator was provided. Hence VUR₂₂₀ is not referred to here.

A discrepancy has been observed in the calculation of VUR between the MS annual fleet report and that of the estimation in the framework of the EWG 25-12. The status in the EWG 25-12 estimation was “in balance” for DTS VL0812, DTS VL1824, TBB VL1824 and TBB VL1012 segments for which the MS annual report indicated “out of balance”. Also, DFN VL2440 Germany indicated as “in balance” when the status in the EWG 24-13 estimation was “out of balance”. No VUR Indicator values for PG VL0008A, PG VL0008L, FPO VL1824, FPO VL 2440 and TBB VL0010 segments was given in fleet report.

No trend analysis could be undertaken due to the application of different calculation periods by MS and EWG 25-12.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call, are given separately by Member State in Section 4.1 of this report. The inactive fleet indicators of fleet segments were not presented in the fleet report.

Assessment of fleet report

The fleet report submitted by Germany provides an updated analysis of the balance between fleet capacity and fishing opportunities for all fleet segments based on DCF data in line with the Commission guidelines COM(2014)545. The indicator values in the fleet report are generally in line with those computed by the EWG 25-12.

In its latest fleet report, Germany concludes that fishing capacity and fishing opportunities are largely well balanced across the fleet segments responsible for the majority of catches. The Member state asserts that such an assessment is supported by the fact that Germany generally does not exceed the fishing opportunities allocated under EU law, indicating effective management within the main commercial segments.

Nevertheless, Germany notes a negative trend in the North Sea shrimp fleet, which the Member State asserts, distorts the overall assessment of balance. To address this, the authorities plan to decommission up to one third of the shrimp vessels with public financial support starting in autumn 2025, as outlined in the national action plan. The objective is to re-establish equilibrium between fishing capacity, available fishing grounds, and quotas.

Regarding the Baltic Sea fisheries, Germany highlights that drastic reductions in fishing opportunities for herring and cod continue to put pressure on fleet management. According to ICES, these stocks are expected to recover only slowly, with a declining trend in biomass compared to previous years. Therefore, further capacity adjustments in the Baltic segments may become necessary in the coming years.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance, the Member State does not provide supporting information and/or analyses.

Discrepancies in previous fleet reports

No major discrepancies between the findings in the fleet report submitted in 2024 and those of the EWG were reported in the EWG 25-12 report. Hence, the Member State had no such discrepancies to address in its report submitted in 2025.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

Germany identified structural overcapacity in 10 vessel segments operating in the Baltic Sea and North Sea regions. For the first time, an imbalance was observed between available capacity and actual fishing opportunities in segments targeting shrimp fisheries.

In the fleet report, no estimates of long-term profitability were provided. The German CR/BER and RoFTA estimations by segment indicate an imbalance for all fleet segments operating in the Baltic Sea region and for three segments in the North Sea.

Overview of action plans

Germany's action plan focuses on two main areas of structural imbalance: small-scale coastal fishing in the Baltic Sea and shrimp fisheries in the North Sea.

The rationale for the proposed action plan as described by the Member State is as follows:

In the Baltic Sea, the most affected segments are small-scale coastal fishers, many of whom operate part-time and contribute only marginally to total catches. Although economic indicators are of limited relevance, the sector continues to experience structural contraction driven by persistently low quotas for cod and herring and an uncertain stock outlook. Larger vessels targeting pelagic herring have also faced difficulties, as quota reductions have limited their ability to use capacity. Emergency closures were introduced in 2024 to protect cod and herring, with temporary financial support granted under the EMFAF Regulation. Since 2014, several fleet segments (PG VL0010, PG VL1012, DFN VL1218, DTS VL1012, DTS VL1218, DTS VL1824, DTS VL2440) have been covered by the action plan, with measures including capacity reductions, scrapping schemes, and quota redistribution. Between 2017 and 2022, decommissioned vessels represented significant catch reductions for key Baltic species.

In the North Sea, the shrimp-fishing segments (TBB VL1012, VL1218, VL1824) show clear imbalance and a sharp deterioration in economic performance. Landings and revenues have been declining since 2016 and reached record lows in 2024. The situation is worsened by rising fuel costs, loss of fishing grounds due to marine conservation and offshore wind development, and uncertainty linked to the EU Action Plan for Marine Ecosystem Protection, which could phase out mobile bottom-trawling in protected areas. Vessel values have dropped substantially, undermining the financial stability of these small, family-run businesses.

To restore balance, Germany plans to decommission up to one-third of the shrimp fleet starting in 2025, supported by public funding.

Adjustment targets and tools

The revised action plan was submitted with the fleet report by 31 May 2025. The targets and tools are defined clearly and are the same as those described in the report submitted in 2023. The timeframe for implementation (starting and ending years) is described by fleet segment and measure.

Number of vessels

The total number of vessels which are targeted by the action plan is 801. However, the number of vessels for which the permanent cessation is foreseen was not reported.

4.4.10 Greece (GRC)

Overview of indicator findings

Area 37

There were 25 fleet segments in 2023, of which 20 were active. Of the 20 active segments, landings and economic data were provided aggregated for 14 fleet segments while capacity data were provided for 25 fleet segments.

Sustainable harvest indicator (SHI)

Out of 20 fleet segments active in 2023, SHI indicator values were available for 13.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 8 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 5 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 39.28% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (60%) segments were **in balance** with fishing opportunities
- 2 (40%) segments were **out of balance** with fishing opportunities

Trends were calculated for 4 segments:

- 1 (25%) fleet segment displayed an **improving** trend
- 1 (25%) fleet segment displayed a **deteriorating** trend
- 2 (50%) fleet segments displayed **no trend**.

Stocks at Risk Indicator (SAR)

SAR indicator values were available for 14 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 9 (64%) fleet segments were **in balance** with fishing opportunities.
- 5 (36%) fleet segments were **out of balance**, with fishing opportunities:
 - 1 (7%) fleet segment with 3 stocks-at-risk
 - 1 (7%) fleet segment with 2 stocks-at-risk
 - 3 (21%) fleet segments with 1 stock-at-risk

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N° of fleet segments		2	11	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%

N° of fleet segments	10	3		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 14 segments/ clusters.

In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 11 (79%) fleet segments were *in balance* with fishing opportunities
- 3 (21%) fleet segments were *out of balance*, with fishing opportunities.

Trends could be calculated for 11 segments:

- 5 (45%) segments or clusters displayed an *improving* trend
- 6 (54%) segments or clusters displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 14 segments or clusters. In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 8 (57%) fleet segments/clusters are in balance with fishing opportunities
- 6 (43%) fleet segments/clusters are out of balance, with fishing opportunities

Trends could be calculated for 11 segments:

- 5 (36%) segments or clusters displayed an *improving* trend
- 6 (43%) segments or clusters displayed a *deteriorating* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for the 20 segments*. In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 15 (75%) segments were *in balance* with fishing opportunities
- 5 (25%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 14 segments:

- 7 (50%) segments displayed an *improving* trend,
- 2 (14%) segments displayed a *deteriorating* trend
- 5 (36%) segments displayed *no clear trend*.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator estimations for 2023 and trends over 2018-2023, a mixed picture emerges regarding the segments that indicated to be in/out of balance with fishing opportunities.

The three purse seine segments score well on all biological and technical indicators. SHI values indicates that all segments may be in balance, with two of the segments showing no clear trend. Economic indicators for PS1824 and PS2440, while indicated as being in balance, show a deteriorating trend, while PS1218 is indicated to be out of balance.

The three demersal segments are indicated to be in balance based on all economic and technical indicators, while DTS 2440 shows a deteriorating trend for economic indicators, but no trend for technical indicators. SAR and SHI indicators for the DTS1824 and DTS 2440 segments indicate out of balance while there is insufficient information to calculate SAR and SHI indicator values for DTS1218.

The HOK0612 is indicated to be in balance with respect to its economic and technical indicators but out of balance according to both biological indicators. All other HOK fleet segments are indicated out of balance according to at least three indicators.

The FPO0006 segment is indicated to be in balance for all indicators except SHI, however the SHI indicator shows an improving trend. All other FPO segments are indicated in balance according to the economic indicators, but the converse is true for the biological and technical indicator values. All indicators show an improving trend however.

All drift/fixed netter segments are indicated to be out of balance by at least three indicators, and show deteriorating trends for the economic indicators. They show mixed trends for the biological and technical indicators.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.10.1.

Table 4.4.10.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

[illegible][illegible]

*Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is indicated in the table with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster.*

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

A comparison of Indicator values computed by the EWG 25-12 and those in the fleet report are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the MS annual fleet report the SHI has been provided for a number of fleet segments for reference year 2023, however they have been split by GSAs and gear groups (PS, OTB and SSF). EWG 25-12 calculated SHI values for thirteen fleet segments for 2023, therefore comparison of SHI values was not possible.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR has not been provided while EWG 25-12 provided SAR for 14 fleet segments. Therefore, a comparison of values is not possible.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the MS annual fleet report the CR/BER has not been provided. Therefore, a comparison with values from EWG 25-12 is not possible.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI information was not provided in the MS report.

The comparison between RoFTA reported in the report and those estimated by EWG 25-12 revealed similar indicators for all segments. The balance indication is the same for available segments between the MS and EWG assessment, except for HOK0006 where the MS assessed the segment as being in balance while the EWG value indicates out of balance. The calculated values between the MS and the EWG are slightly different.

The MS annual fleet report provided indicator data for three years, without calculating a trend value. However, it was possible to compare these data with the values calculated by EWG 25-12. In general, the indicators showed similar indications for the three years.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The MS annual fleet report provides VUR data for nine segments in three gear groups – OTB, PS and ‘coastal’, each divided into three vessel length categories. Six of the segments are comparable, and have similar values, with those calculated by EWG 25-12. The other three segments are not comparable with values from EWG 25-12.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted in 2025 provides indicator values separately by fleet segment based on DCF information and for many of the indicators specified in the Commission guidelines (COM (2014) 545). Fleet segments that are assessed by the Member State to be “out of balance” with fishing opportunities are clearly identified in the fleet report. No action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report, although the Member State proposed to develop one in previous years.

In its fleet report, the MS asserts that the Greek management system has improved significantly in recent years. A number of weaknesses in the management system still remain, relating to the large number of vessels in the fleet which are multi-species fishing with a large variety of fishing gears, and the very long coastline. The geomorphology of Greece makes the work of control authorities at sea difficult. The MS plans to make a number of improvements to the system in the near future, including the upgrading and expanding of the fisheries control system, although no final dates have been provided.

The Greek fleet report submitted in 2025 does not provide an assessment of balance between fleet capacity and fishing opportunities for all fleet segments. It notes that for several fleet segments the balance indicators show a positive trend. It further provides some justification as to why other fleet segments are imbalanced, however it does not provide an action plan to remedy these segments.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but the Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information and analyses.

Discrepancies in previous fleet reports

The fleet report submitted in 2025 has provided indicator values for SHI, VUR, RoFTA and inactive vessels, for a number of fleet segments, but data for some segments are absent. No values have been provided for SAR or CR/BER. SHI values have been provided for some fleet segments, but by fishing area and species.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS has not indicated whether structural overcapacity exists in the fleet. While providing information on the economic indicators the MS doesn't state whether it considers the various fleet segments to be profitable or not.

The MS identified areas of concern regarding certain fleets, in particular, fleet segments fishing for hake. In recent years the reference thresholds for SHI for these sectors have been exceeded. In the 2024 fleet report the MS had proposed to submit an action plan to address these issues before the end of 2024, however this action plan was not submitted with the 2025 report.

Overview of action plan

In the Annual fishing fleet report, MS recognises that some fleet segments remain imbalanced. The absence of an action plan for such segments is justified by the MS as follows:

- Regarding DTS1218 the Member State says that it has not been clearly demonstrated that fishing capacity is not effectively balanced with fishing opportunities, given that boat seines using winch trawl (SB), the main gear for these segments, have not been actively fishing since 1 April 2020. As a result, MS considers that it is not necessary to draw up or implement an action plan for these segments.
- Regarding HOK0006 the Member State notes that “these vessels operate in peripheral regions where fishing is a side business (...). The ‘fishers’ declared use of HOK0006 entails a high rate of error and subjectivity”.
- The Member State notes that a management plan is in place for the DTS 1824 and 2440 since 2014. The management plan for the DTS fleet segments may need to be revised taking into account that the upper reference levels for SHI for Hake have been exceeded.
- Regarding the PS1824 and PS2440 fleet segments the MS notes that management plans are currently in place for these segments. It states that there are no grounds to take additional measures for the PS fleet segments to protect the main sardine and anchovy stocks, as the indicators show a positive trend. The MS is monitoring the implementation of the approved plan and will take appropriate measures to revise or supplement it, if these prove necessary.
- GFCM results show that the fishing pressure from the HOK1218 fleet segment on the Hake stock is considerable. The need to draw up an action plan for this segment will be assessed.

Adjustment of targets and tools

No new or revised action plans have been submitted by the Member State.

Number of vessels

No new or revised action plans have been submitted by the Member State.

4.4.11 Ireland (IRL)

Overview of indicator findings

Area 27

There were 36 fleet segments identifiable in 2023, of which 30 were active. Of the active segments, landings data and economic data were available for 20 segments (including 6 clustered segments) to calculate the indicators.

Sustainable harvest indicator (SHI)

SHI indicator values were available for 20 fleet segments active in 2023.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 7 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 13 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 75.96% of the total value of the landings in 2023

provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 10 (77%) segments were *in balance* with fishing opportunities,
- 3 (23%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 12 fleet segments:

- 4 segments displayed a *decreasing (improving)* trend,
- 3 segments displayed a *deteriorating* trend,
- 5 segments displayed *no clear trend*.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 20 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 10 (50%) segments were *in balance* with fishing opportunities,
- 10 (50%) segments were *out of balance* with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion on NOS	0-<25%	25-<50%	50%-<75%	75-100%
No of fleet segments	7	12		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	17	1	1	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA).

RoI was not calculated.

RoFTA was calculated for 19 segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 9 (47%) segments were *in balance* with fishing opportunities,
- 10 (53%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 8 segments:

- 5 segments displayed a **deteriorating** trend,
- 3 segments displayed an **improving** trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 19 segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 9 (47%) segments were **in balance** with fishing opportunities,
- 10 (53%) segments were **out of balance** with fishing opportunities.

Trends could be calculated for 8 segments:

- 3 segments displayed a deteriorating trend.
- 3 segments displayed an improving trend
- 2 segments displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for 30 segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5 (17%) segments were **in balance** with fishing opportunities,
- 25 (83%) segments were **out of balance** with fishing opportunities.

VUR trends could be calculated for 25 segments:

- 8 segments displayed a **deteriorating** trend.
- 1 segment displayed an **improving** trend.
- 16 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, two fleet segments are indicated to be in balance with fishing opportunities (IRL NAO DRB2440*, IRL NAO FPO0010) because all indicator values indicate that the segments are in balance although SHI was not estimated for these two segments). The other segments are indicated to be out of balance with fishing opportunities, with at least one indicator suggesting imbalance.

In three segments (IRL NAO DTS1218, IRL NAO DFN1824 *, IRL NAO DFN0010) both biological indicators (SHI and SAR) indicate in balance, and in 6 segments where no SHI value was computed, the SAR value indicates that they are in balance.

Regarding economic and technical indicators, the majority of the fleet's segments are indicated to be out of balance with fishing opportunities, with a deteriorating trend over time for all the assessed indicators.

Return on Fixed Tangible Assets (RoFTA) was calculated for 19 segments. Of these, 9 segments are indicated to be in balance with fishing opportunities, accounting for approximately 47% of the total segments, while 10 segments, or about 53%, are indicated to be out of balance. The trend analysis was conducted for 8 segments, where 5 segments showed a deteriorating trend (about 63%), and 3 segments displayed an improving trend (37%).

The Ratio between Current Revenue and Break-Even Revenue (CR/BER) was also calculated for 19 segments, with 9 segments (47%) indicated to be in balance and 10 segments (53%) indicated to be out of balance with fishing opportunities. Trends were determined for 8 segments: 3 segments (38%) had a deteriorating trend, 3 segments (38%) showed an improving trend, and 2 segments (25%) displayed no clear trend.

The Vessel Use Indicator (VUR) was calculated for 30 segments. Of these, 5 segments (17%) are indicated to be in balance with fishing opportunities, and 25 segments (83%) are indicated to be out of balance. Trend analysis for 25 segments revealed that 8 segments (32%) showed a deteriorating trend, 1 segment (4%) had an improving trend, and 16 segments (64%) displayed no clear trend.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.11.1.

Table 4.4.11.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	insufficiently profitable
	borderline
	insufficient data

		Status 2023							Status 2023			
		Economic							Biological			Technical
Fleet segment/ clustered segment	Nb of vesse ls	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR
IRL NAO DFN0010	59						IRL NAO DFN0010	59				
IRL NAO DFN1012	15						IRL NAO DFN1012	15	1			
IRL NAO DFN1824 *	18						IRL NAO DFN1218	10				
							IRL NAO DFN1824	7				
							IRL NAO DFN2440	1				
IRL NAO DRB0010	90						IRL NAO DRB0010	90				
IRL NAO DRB1012 *	52						IRL NAO DRB1012	44				
							IRL NAO DRB1218	8				
IRL NAO DRB2440 *	7						IRL NAO DRB1824	3				
							IRL NAO DRB2440	4				
IRL NAO DTS0010	17						IRL NAO DTS0010	17	1			
IRL NAO DTS1012	10						IRL NAO DTS1012	10	1			
IRL NAO DTS1218	21						IRL NAO DTS1218	21				
IRL NAO DTS1824	51						IRL NAO DTS1824	51	4			
IRL NAO DTS2440	43						IRL NAO DTS2440	43	5			
IRL NAO FPO0010	807						IRL NAO FPO0010	807				
IRL NAO FPO1012	90						IRL NAO FPO1012	90				
IRL NAO FPO1218 *	33						IRL NAO FPO1218	30				
							IRL NAO FPO1824	1				
							IRL NAO FPO2440	2				
IRL NAO HOK0010	17						IRL NAO HOK0010	17	1			
IRL NAO HOK1012 *	7						IRL NAO HOK1012	6				
							IRL NAO HOK1218	1				
IRL NAO TBB2440 *	13						IRL NAO TBB1824	6				
							IRL NAO TBB2440	7	1			
IRL NAO TM 1218 *	8						IRL NAO TM 0010	2				
							IRL NAO TM 1012	2				
							IRL NAO TM 1218	4	1			
IRL NAO TM 2440	15						IRL NAO TM 2440	15	1			
IRL NAO TM 40XX	20						IRL NAO TM 40XX	20	1			
Total active	1393											
Total inactive	600											
% of inactive in total	30.0											

	improving
	deteriorating
	no clear trend
	null/flat trend
	insufficient data

		Trends 2019-2023							Trends 2019-2023		
		Economic							Biological		Technical
Fleet segment/ clustered segment	Nb of vess els	CR/ BER	RoFTA	ROI	NP margi n	NVA/ FTE	Fleet segment	Nb of vesse ls	SHI	EDI	VUR
IRL NAO DFN0010	59						IRL NAO DFN0010	59			
IRL NAO DFN1012	15						IRL NAO DFN1012	15			
IRL NAO DFN1824 *	18						IRL NAO DFN1824 *	10			
							IRL NAO DFN1824 *	7			
							IRL NAO DFN1824 *	1			
IRL NAO DRB0010	90						IRL NAO DRB0010	90			
IRL NAO DRB1012 *	52						IRL NAO DRB1012 *	44			
							IRL NAO DRB1012 *	8			
IRL NAO DRB2440 *	7						IRL NAO DRB2440 *	3			
							IRL NAO DRB2440 *	4			
IRL NAO DTS0010	17						IRL NAO DTS0010	17			
IRL NAO DTS1012	10						IRL NAO DTS1012	10			
IRL NAO DTS1218	21						IRL NAO DTS1218	21			
IRL NAO DTS1824	51						IRL NAO DTS1824	51			
IRL NAO DTS2440	43						IRL NAO DTS2440	43			
IRL NAO FPO0010	807						IRL NAO FPO0010	807			
IRL NAO FPO1012	90						IRL NAO FPO1012	90			
IRL NAO FPO1218 *	33						IRL NAO FPO1218 *	30			
							IRL NAO FPO1218 *	1			
							IRL NAO FPO1218 *	2			
IRL NAO HOK0010	17						IRL NAO HOK0010	17			
IRL NAO HOK1012 *	7						IRL NAO HOK1012 *	6			
							IRL NAO HOK1012 *	1			
IRL NAO TBB2440 *	13						IRL NAO TBB2440 *	6			
							IRL NAO TBB2440 *	7			
IRL NAO TM 1218 *	8						IRL NAO TM 1218 *	2			
							IRL NAO TM 1218 *	2			
							IRL NAO TM 1218 *	4			
IRL NAO TM 2440	15						IRL NAO TM 2440	15			
IRL NAO TM 40XX	20						IRL NAO TM 40XX	20			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

Indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are compared in Annex II to this report.

Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

The most recent SHI values provided in the Irish fleet report are for 2022. Therefore, a comparison between the indicator values computed by the Expert group with those prepared by the MS was not carried out.

Stocks at Risk Indicator (SAR)

The most recent SAR values provided in the Irish fleet report are for 2022. Therefore, a comparison between the indicator values computed by the Expert group with those prepared by the MS was not carried out.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between the CR/BER values reported in the MS fleet report and those estimated under the EWG 25-12 framework showed differing results for several segments, with 9 segments indicating differing balance status. Such discrepancies arise from the variation in input data used to calculate the indicator values.

Return on Fixed Tangible Assets (RoFTA)

The comparison between the RoFTA values reported in the MS fleet report and variation in input data used to calculate the indicator values.

The Vessel Use Indicator (VUR)

The comparison between VUR reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed similar outputs for most of the segments except for the segments IRL NAO DFN1824 *, IRL NAO DTS2440 and IRL NAO FPO1218 *where the segments are indicated to be out of balance according the EWG 25-12 values, while in Fleet report this segment are indicated to be in balance.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted in 2025 provides indicator values separately by fleet segment based on DCF information for 2023 (economic and technical indicators) or for 2022 (biological indicators) and for the majority of the indicators (data on inactive vessels are missing) specified in the Commission guidelines (COM (2014) 545).

Fleet segments assessed by the Member State to be “out of balance” with fishing opportunities are clearly identified in the fleet report. In most situations where one or more indicators indicate an imbalance in a fleet segment, the fleet report provides an opinion as to why the indicators suggest imbalance and in some cases an outlook is given for the most likely development of such indicators in the near future.

In cases, where the methodology for the economic indicators deviates from that advocated by the guidelines, a clear explanation of the reasoning has been provided. The MS noted in the fleet report that the Annual Economic Report (AER), DG Fisheries and Maritime Affairs and EWG 24-13 each used separate and distinct definitions of the economic indicators. A principal source of these discrepancies is the different definitions of the opportunity cost of capital used.

Discrepancies in previous fleet report

As in previous years, in its fleet report, the MS has used values for the biological indicators taken from the previous year's balance report (in this case the STECF 24-13 report). However, these data do not correspond to the same reference year as the data discussed in EWG 25-12. Therefore, the biological data used in fleet report are not comparable with the more recent values computed by EWG 25-12, which pertains to 2023. A similar comment was made to the MS last year in the STECF 24-13 report.

Structural overcapacity and profitability

Based on the available information, the Irish fleet report considers that structural imbalance does not exist in any of its fleet segments and no action plan is proposed.

Adjustment targets and tools

No action plan for fleet segments assessed by the Member State to be "out of balance" is included in the fleet report and no new or revised action plans were proposed.

Number of vessels

No new or revised action plan was proposed.

4.4.12 Italy (ITA)

Overview of indicator findings

There were 39 fleet segments in 2023, of which 31 were active. Of the 31 active segments, landings were provided for 31 fleet segments and economic data were provided aggregated for 22 fleet segments. The Italian fishing fleet in 2023 consisted of 11689 vessels. Of these, 9645 vessels (83%) were active, while 2044 vessels (17%) were inactive.

Area 37

Sustainable harvest indicator (SHI)

Out of 29 fleet segments active in 2023, SHI indicator values were available for 27.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 7 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings in 2023 by those fleet segments.

The EWG notes that the 20 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 66.75% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that SHI values for 2023 indicate:

- 15 (75%) segments were *in balance* with fishing opportunities,
- 5 (25%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 17 fleet segments:

- 13 fleet segments displayed a *decreasing* (improving) trend,
- 4 fleet segments displayed *no clear* trend,

Stocks at Risk Indicator (SAR)

The SAR indicator was available for all the 29 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 13 (45%) segments were *in balance* with fishing opportunities,
- 16 (55%) segments were *out of balance* with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	5	20	1	1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	13	5	8	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

There were 39 fleet segments in the Italian fleet in 2023. After clustering 22 segments were available for analysis. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 12 (55%) segments were in balance with fishing opportunities,
- 10 (45%) segments were out of balance with fishing opportunities.

Trends could be calculated for 20 segments:

- 5 segments displayed an *improving* trend,

- 15 segments displayed a **deteriorating** trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 22 segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 8 (36%) segments were **in balance** with fishing opportunities.
- 14 (64%) segments were **out of balance** with fishing opportunities.

Trends could be calculated for 20 segments:

- 3 segments displayed an **improving** trend,
- 12 segments displayed a **deteriorating** trend,
- 5 segments displayed **no clear** trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for 30 segments*. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5 (17%) segments were **in balance** with fishing opportunities,
- 25 (83%) segments were **out of balance** with fishing opportunities.

Trends could be calculated for 26 segments:

- 3 segments displayed an **improving** trend,
- 4 segments displayed a **deteriorating** trend,
- 17 segments displayed **no clear** trend and
- 2 segments displayed null or flat trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

OFR

Sustainable harvest indicator (SHI)

Out of the 2 active fleet segments in 2023, SHI indicator value was available for 2 segments.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator value for 1 fleet segment cannot be used meaningfully to assess the balance or imbalance because the indicator value is based on stocks that comprise less than 40% of the total value of landings by this fleet segment.

The EWG notes that the 1 fleet segment for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 76.74% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the value indicates:

- 1 (100%) segment was *in balance* with fishing opportunities.

The trend could be calculated for 1 segment:

- 1 segment displayed *no clear trend*.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for the 2 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (100%) segments were *in balance* with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments		1		

Economic Dependency Indicator (EDI)

Fleet segments' distribution over EDI classes is shown in the table below. The Fleet segment reported is the one for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

No data available.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

No data available.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analyzed here.

VUR was calculated for 2 segments*. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (100%) segments were *in balance* with fishing opportunities.

Trends could be calculated for 2 segments:

- 2 segments displayed an *improving* trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

In accordance with the Commission guidelines, the EWG notes that no fleet segments were indicated to be in balance with fishing opportunities since at least one indicator value (SHI, SAR, RoFTA, CR/BER, VUR) indicated out of balance for all segments. Based on the biological indicator values for 2023 (SHI and SAR indicators) and their trends over 2019-2023, some fleet segments are indicated to be in balance by both indicators" (e.g. ITA MBS PS 1218 NGI, ITA MBS PS 2440 NGI). However, most fleet segments are indicated to be out of balance according to at least one of the indicators (e.g. ITA MBS TBB1824 NGI, ITA MBS TM 2440 NGI). The EWG notes that the number of segments indicated to be in balance by both the SHI and SAR indicator values has increased, and where the trends in SHI are available, they are improving (i.e. decreasing trends) for most segments.

Based on the RoFTA values for 22 segments, 12 out of 22 (55%) segments are indicated to be in balance and 10 segments (45%) out of balance. Trends in RoFTA values are available for 20 segments and indicate 5 segments (25%) an increasing (improving) trend for 5 (25%) segments and a declining (deteriorating trend for 15 (75%) segments.

Current Revenue and Break-Even Revenue (CR/BER) could be computed for 22 segments; 8 (36%) segments are indicated to be in balance and 12 (64%) out of balance.

Trends in CR/BER across 20 segments, indicate an increasing (improving) trend for 3 (15%) segments, a declining (deteriorating) trend for 12 (60%) and no clear trend for 5 (25%) segments. 23% by number of active segments are indicated to be in balance according to the VUR indicator values. Trends in VUR were analysed across 28 segments. 5 (18%) segments showed an increasing (improving) trend, while 4 (14%) segments indicated decreasing (deteriorating) trends, 17 (61%) segments showed no clear trend and 2 (7%) segments displayed a flat or null trend.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.12.1.

Table 4.4.12.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	insufficiently profitable
	borderline
	insufficient data

		Status 2023							Status 2023			
		Economic							Biological			Technical
Fleet segment/ clustered segment	Nb of vesse ls	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR
ITA MBS DRB1218 NGI *	641						ITA MBS DRB0612 NGI	91				
							ITA MBS DRB1218 NGI	549				
							ITA MBS DRB1824 NGI	1				
ITA MBS DTS0612 NGI	94						ITA MBS DTS0612 NGI	94				
ITA MBS DTS1218 NGI	991						ITA MBS DTS1218 NGI	991	4			
ITA MBS DTS1824 NGI	516						ITA MBS DTS1824 NGI	516	4			
ITA MBS DTS2440 NGI	166						ITA MBS DTS2440 NGI	166	2			
ITA MBS HOK0612 NGI	134						ITA MBS HOK0612 NGI	134	1			
ITA MBS HOK1218 NGI	207						ITA MBS HOK1218 NGI	207	4			
ITA MBS HOK1824 NGI *	54						ITA MBS HOK1824 NGI	52	1			
							ITA MBS HOK2440 NGI	2	1			
ITA MBS PGP0006 NGI	1755						ITA MBS PGP0006 NGI	1755	1			
ITA MBS PGP0612 NGI	4515						ITA MBS PGP0612 NGI	4515	3			
ITA MBS PGP1218 NGI *	156						ITA MBS PGP1218 NGI	152	1			
							ITA MBS PGP1824 NGI	3				
							ITA MBS PGP2440 NGI	1				
ITA MBS PS 0612 NGI	103						ITA MBS PS 0612 NGI	103				
ITA MBS PS 1218 NGI	71						ITA MBS PS 1218 NGI	71				
ITA MBS PS 1824 NGI	33						ITA MBS PS 1824 NGI	33				
ITA MBS PS 2440 NGI	33						ITA MBS PS 2440 NGI	33				
ITA MBS PS 40XX NGI	11						ITA MBS PS 40XX NGI	11				
ITA MBS TBB1218 NGI *	9						ITA MBS TBB0612 NGI	3				
							ITA MBS TBB1218 NGI	6	1			
ITA MBS TBB1824 NGI	30						ITA MBS TBB1824 NGI	30	1			
ITA MBS TBB2440 NGI	22						ITA MBS TBB2440 NGI	22				
ITA MBS TM 1218 NGI *	28						ITA MBS TM 0612 NGI	3	1			
							ITA MBS TM 1218 NGI	25	1			
ITA MBS TM 1824 NGI	39						ITA MBS TM 1824 NGI	39	1			
ITA MBS TM 2440 NGI	34						ITA MBS TM 2440 NGI	34	1			
ITA OFR DTS40XX IWE	2						ITA OFR DTS40XX IWE	2				
ITA OFR PS 40XX IWE	1						ITA OFR PS 40XX IWE	1				
Total active	9645											
Total inactive	2044											
% of inactive in total	17.5											

	improving
	deteriorating
	no clear trend
	null/flat trend
	insufficient data

		Trends 2019-2023							Trends 2019-2023		
		Economic							Biological		Technical
Fleet segment/ clustered segment	Nb of vess els	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vesse ls	SHI	EDI	VUR
ITA MBS DRB1218 NGI *	641						ITA MBS DRB0612 NGI	91			
							ITA MBS DRB1218 NGI	549			
							ITA MBS DRB1824 NGI	1			
ITA MBS DTS0612 NGI	94						ITA MBS DTS0612 NGI	94			
ITA MBS DTS1218 NGI	991						ITA MBS DTS1218 NGI	991			
ITA MBS DTS1824 NGI	516						ITA MBS DTS1824 NGI	516			
ITA MBS DTS2440 NGI	166						ITA MBS DTS2440 NGI	166			
ITA MBS HOK0612 NGI	134						ITA MBS HOK0612 NGI	134			
ITA MBS HOK1218 NGI	207						ITA MBS HOK1218 NGI	207			
ITA MBS HOK1824 NGI *	54						ITA MBS HOK1824 NGI	52			
							ITA MBS HOK2440 NGI	2			
ITA MBS PGP0006 NGI	1755						ITA MBS PGP0006 NGI	1755			
ITA MBS PGP0612 NGI	4515						ITA MBS PGP0612 NGI	4515			
ITA MBS PGP1218 NGI *	156						ITA MBS PGP1218 NGI	152			
							ITA MBS PGP1824 NGI	3			
							ITA MBS PGP2440 NGI	1			
ITA MBS PS 0612 NGI	103						ITA MBS PS 0612 NGI	103			
ITA MBS PS 1218 NGI	71						ITA MBS PS 1218 NGI	71			
ITA MBS PS 1824 NGI	33						ITA MBS PS 1824 NGI	33			
ITA MBS PS 2440 NGI	33						ITA MBS PS 2440 NGI	33			
ITA MBS PS 40XX NGI	11						ITA MBS PS 40XX NGI	11			
ITA MBS TBB1218 NGI *	9						ITA MBS TBB0612 NGI	3			
							ITA MBS TBB1218 NGI	6			
ITA MBS TBB1824 NGI	30						ITA MBS TBB1824 NGI	30			
ITA MBS TBB2440 NGI	22						ITA MBS TBB2440 NGI	22			
ITA MBS TM 1218 NGI *	28						ITA MBS TM 0612 NGI	3			
							ITA MBS TM 1218 NGI	25			
ITA MBS TM 1824 NGI	39						ITA MBS TM 1824 NGI	39			
ITA MBS TM 2440 NGI	34						ITA MBS TM 2440 NGI	34			
ITA OFR DTS40XX IWE	2						ITA OFR DTS40XX IWE	2			
ITA OFR PS 40XX IWE	1						ITA OFR PS 40XX IWE	1			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators are reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

A comparison of Indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 is given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

The SHI values provided by the Italian fleet report are based on a fleet segmentation by Geographical Subarea (GSA), which is different to that used by EWG 25-12. Therefore, a comparison between indicator values computed by the Expert group with those prepared by the MS cannot be made.

Stocks at Risk Indicator (SAR)

The SAR values provided by the Italian fleet report are based on a fleet segmentation by GSA, which is different to that used by EWG 25-12. Therefore, a comparison between indicator values computed by the Expert group with those prepared by the MS cannot be made.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the annual fleet report the Member State did not provide the relevant data for 2023, making a comparison with the EWG values impossible.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the annual fleet report the Member State did not provide the relevant data for 2023, making a comparison with the EWG values impossible.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The VUR values provided by the Italian fleet report are based on a fleet segmentation by GSA, which is different to that used by EWG 25-12. Therefore, a comparison between indicator values computed by the Expert group with those prepared by the MS cannot be made.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet segment submitted in 2025 provides indicator values separately by fleet segment based on DCF information for all indicators specified in the Commission guidelines (COM (2014) 545). While the segmentation used for the Italian fleet report uses the standard fleet segmentation adopted under the DCF for economic indicators, some indicator values (SHI, SAR, VUR) for the Mediterranean and Black Sea (area 37) are reported separately by segment and GSA. Because stock assessments and management are GSA-based, the EWG

25-12 considers that providing indicator values in such a way, may lead to a more informative indication of potential overcapacity than providing indicator values by segment for the entire area 37. On the contrary, if a particular fleet segment fishes several different GSAs, the indicator values will be based on more stocks than those for a single GSA.

Such an approach differs from that adopted by most other Member States, the present EWG and by the STECF. It also prevents a comparison between the SHI, SAR and VUR indicator values estimated by the EWG 25-12.

In contrast to previous fleet reports, the SAR indicator was also presented in the Italian fleet report submitted by 31 May 2025.

Fleet segments assessed by the Member State to be “out of balance” with fishing opportunities are clearly identified in the fleet report. In cases where one or both biological indicators indicate that a segment is “out of balance”, it is pointed out that this imbalance could be linked to and influenced by the fishing activity of non-Italian fleets.

An action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report, although it is not clear from the plan exactly which segments are affected by most measures. The aim is to reduce the current fishing mortality through a series of measures, which partly have already been implemented but are to be further developed annually.

Discrepancies in previous fleet reports

The information on SHI and VUR was provided by GSA in last year’s report in order to capture geographical differences in economic and social performance and the state of the fisheries, as reflected by the overall condition of the targeted stocks. This was commented by EWG 22-15, EWG 23-13 and EWG 24-13 and was assessed as being partly not in line with the Commission Guidelines. This also prevented a comparison between the SHI and VUR indicator values estimated by the EWG 25-12. In this year’s report, the information on SHI and VUR was again provided by GSA.

Contrary to the reports of previous years, the SAR indicator was presented this year. However, this indicator was also presented by GSA.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

Fleet segments assessed as out of balance with fishing opportunities are identified in the Fleet report and an action plan is provided for such fleet segments.

No estimates of long-term profitability based on 2023 economic indicators are given in the Fleet report.

Overview of action plan

The Italian action plan aims to reduce the current fishing mortality through the combined effect of different measures. The main goal of the plan is to reduce the fishing effort in several fishing segments through a reduction in trawling activity and vessel decommissioning. The EWG notes that the plan includes a continuation of measures already established prior to and including 2024.

Such measures include:

- In GSAs 8 to 11, trawling is prohibited from 1 to 30 October, twin trawling is prohibited, five closed areas have been established that cover at least 5% of fishing areas at depths between 100 and 500 m, trawling is prohibited at depths greater than 800 m, specific areas are permanently closed to fishing and areas will be established that are permanently closed to fisheries with the aim of reducing catches of juveniles of demersal species or catches of spawning fish species.
- From 1 July to 31 October 2025 fishing with towed nets is prohibited at a distance of less than 6 nautical miles from the shore or at a depth of less than 60 m in specific areas of the Adriatic and Ionian Seas.
- A permanent cessation plan (under the 2021-2027 EMFAF) has been developed with set targets (%) for the reduction of GT and kW by GSA and fishing technique. The aim is to finish the scrapping of vessels by 2026.
- Management measures for targeted fishing of demersal stocks have been applied. Italy has issued decrees listing the vessels, which are authorized to fish demersal species, Mediterranean deep-sea giant red shrimp and Mediterranean blue and red shrimp in different GSAs.

Adjustment targets and tools

The action plan (AP) presented in this year's fleet report is a revised version of last year's action plan. Specific tools for a reduction in fishing pressure have been adjusted, the MS presents a table with the scrapping targets per GSA by segment.

The EWG notes that the information presented in the Italian fleet report is insufficient to quantitatively assess whether the proposed measures in the action plan will result in a reduction in fishing mortality of relevant targeted species or the extent to which any potential imbalance between capacity and fishing opportunities for Italian fleet segments will be affected.

Number of vessels

Table 4.4.12.2. show the measures in the action plan. The measures in the action plan presented by the MS are mostly GSA-specific. In the scrapping plan, the minimum tonnage to be withdrawn is provided by fleet segment per GSA. In addition, the number of vessels (absolute and in %) that have applied for scrapping is listed for each segment and GSA (see MS fleet report table below), so the number of vessels affected is therefore known (n = 859).

Table 4.4.12.2. Measures in the action plan.

GSA	GEAR	LOA CLASS	Number of vessels registered	Total GT	Minimum GT to be withdrawn	Applications received	Total GT of eligible applications	% of registered vessels
9	BOTTOM TRAWL	12<=LOA<18	158	3 473	593	35	706	22.15
		18<=LOA<24	135	7 417	1 311	56	2 804	41.48
		24<=LOA<40	13	1 179	78	7	564	53.85
10	BOTTOM TRAWL	06<=LOA<12	11	72	6	4	22	36.36
		12<=LOA<18	207	3 569	544	55	913	26.57
		18<=LOA<24	114	6 041	888	39	1 865	34.21

		24<=LOA<40	15	1 862	573	6	352	40.00
11	BOTTOM TRAWL	24<=LOA<40	36	5 692	520	18	2 045	50.00
16	BOTTOM TRAWL	12<=LOA<18	122	2 151	121	60	1 068	49.18
		18<=LOA<24	134	8 035	432	69	4 179	51.49
		24<=LOA<40	83	12 644	797	58	8 655	69.88
17	BOTTOM TRAWL	06<=LOA<12	54	303	16	4	21	7.41
		12<=LOA<18	221	4 800	297	71	1 635	32.13
		18<=LOA<24	161	10 658	635	95	6 090	59.01
		24<=LOA<40	43	4 707	216	30	3 278	69.77
18	BOTTOM TRAWL	12<=LOA<18	276	5 194	317	112	1 862	40.58
		18<=LOA<24	66	3 231	245	23	1 137	34.85
		24<=LOA<40	10	789	182	5	435	50.00
19	BOTTOM TRAWL	06<=LOA<12	12	81	22	5	25	41.67
		12<=LOA<18	167	2 682	214	42	635	25.15
		18<=LOA<24	20	1 042	199	8	482	40.00
		24<=LOA<40	8	720	231	8	570	100.00
16	MIDWATER TRAWL	18<=LOA<24	13	110	55	13	706	650.00
		24<=LOA<40	17	975	115	0	0	0.00
17	MIDWATER TRAWL	12<=LOA<18	31	738	178	0	0	0.00
		18<=LOA<24	16	992	248	2	116	12.50
		24<=LOA<40	27	3 059	680	21	2 534	77.78
18	MIDWATER TRAWL	24<=LOA<40	12	1 140	83	13	642	108.33
16	PURSE-SEINE	06<=LOA<12	3	29	20	4	0	133.33
		18<=LOA<24	10	437	44	8	380	80.00
		24<=LOA<40	4	433	217	1	87	25.00
17	PURSE-SEINE	06<=LOA<12	3	26	18	6	26	200.00
		12<=LOA<18	1	13	13	0	0	0.00
17	'RAPIDO' TRAWL	12<=LOA<18	13	301	54	2	40	15.38
		18<=LOA<24	23	1 709	277	13	998	56.52
		24<=LOA<40	25	3 007	137	11	1 222	44.00
10	LOGLINES	18<=LOA<24	9	447	50	14	254	155.56
18	LOGLINES	12<=LOA<18	23	399	88	8	111	34.78
		18<=LOA<24	1	17	17	0	0	0.00
19	LOGLINES	12<=LOA<18	74	1 160	142	29	323	39.19
		18<=LOA<24	27	1 698	184	11	517	40.74

17	SMALL-SCALE FISHING	00<=LOA<06	575	575	18	4	4	0.70
		06<=LOA<12	1 025	1 917	53	38	135	3.71

Source: Own elaborations.

4.4.13 Latvia (LVA)

Overview of indicator findings

There were 10 fleet segments in the Latvian fleet in 2023, of which 6 were active. Of the 6 active segments, landings and economic data were provided for PGP VL0008, PGP VL0812, TM VL1218 and TM VL2440.

Area 27

Sustainable Harvest Indicator (SHI)

Out of fleet segments active in 2023, landings in value have been provided aggregated in 4 fleet segments and SHI indicator values were available for 4.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 1 fleet segment cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by this fleet segment.

The EWG notes that for the 3 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 97.72% of the total value of the landings in 2023 provided by MS.

The SHI indicator was available for 3 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (100%) fleet segments were **out of balance** with fishing opportunities.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 4 (100%) fleet segments were **in balance** with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments		3		1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{msy} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments		2		2

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (75%) segments were *in balance* with fishing opportunities,
- 1 (25%) segment was *out of balance* with fishing opportunities.

Trends could be calculated for 2 segments:

- 2 segments displayed an *improving* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 3 (75%) segments were *in balance* with fishing opportunities,
- 1 (25%) segment was *out of balance* with fishing opportunities.

Trends could be calculated for 2 segments:

- 2 segments displayed an *improving* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR₂₂₀)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR²²⁰ is not analysed here.

The VUR indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that values indicate:

- 2 (50%) segments were *in balance* with fishing opportunities,
- 2 (50%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 2 segments:

- 1 segment displayed an *improving* trend,
- 1 segment displayed *no clear* trend.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call, are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, four fleet segments are indicated to be out of balance with fishing opportunities (TM VL1218, TM VL2440, PGP VL0008 and PGP VL0812) in terms of SHI with no clear or no trend and in balance according to the SAR indicator.

RoFTA and CR/BER indicate that fleet segments TM VL2440, PGP VL0008 and PGP VL0812 are long-term and short-term economically profitable and with an improving trend for segment TM VL2440.

Two fleet segments (PGP VL0008 and PGP VL0812) indicate some potential imbalance in terms of VUR and one (TM VL1218) in terms of RoFTA and CR/BER, but with an improving trend for both indicators.

The above observations largely agree with the assessment of balance in the Member States' fleet report submitted in 2025 for the segments for which a comparison can be made.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 4.4.13.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Status										
		in balance										
		out of balance										
		borderline										
		insufficiently profitable										
		insufficient data										

		Status 2023							Status 2023			
		Economic							Biological		Technical	
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR
LVA NAO TM40XX IWE	3						LVA NAO TM40XX IWE	3				
LVA NAO PGP0008 NGI	120						LVA NAO PGP0008 NGI	116				
LVA NAO PGP0812 NGI	41						LVA NAO PGP0812 NGI	37				
LVA NAO TM1218 NGI	9						LVA NAO TM1218 NGI	9				
LVA NAO TM2440 NGI	26						LVA NAO TM2440 NGI	26				
LVA OFR TM40XX IWE	2						LVA OFR TM40XX IWE	2				
Total active vessels	201											
Total inactive vessels	66											
% of inactive in total	25%											

		Trend										
		improving										
		deteriorating										
		null/flat trend										
		no clear trend										
		insufficient data										
		no data										

		Trends 2019-2023							Trends 2019-2023		
		Economic							Biological		Technical
Fleet segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SHI	EDI	VUR
LVA NAO TM40XX IWE	3						LVA NAO TM40XX IWE	3			
LVA NAO PGP0008 NGI	116						LVA NAO PGP0008 NGI	116			
LVA NAO PGP0812 NGI	37						LVA NAO PGP0812 NGI	37			
LVA NAO TM1218 NGI	9						LVA NAO TM1218 NGI	9			
LVA NAO TM2440 NGI	26						LVA NAO TM2440 NGI	26			
LVA OFR TM40XX IWE	2						LVA OFR TM40XX IWE	2			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Source: own elaborations.

Comparison of indicator values

A comparison of indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are given in Annex II.

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report the SHI has been provided for the reference year 2023 for two fleet segments (TM VL1218 and TM VL2440). Data were not provided in the Member State's report for the PGP VL0008 and PGP VL0812 segments, but it was computed by the EWG.

A comparison between indicator values in the MS Fleet report and the values for equivalent fleet segments as estimated by EWG 25-12 indicate that the status of 2 of the fleet segments

for which a comparison can be made (TM VL1218 and TM VL2440) is the same, both indicating out of balance.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR was not provided and no comparison could be made.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

Discrepancies were found between the MS annual fleet report and those estimated in the framework of EWG 25-12. For all fleet segments the indicator values from the MS annual fleet report are lower than those calculated by the EWG. Two fleet segments (PGP VL0812 and TM VL2440) reveal positive values (above 1) for this indicator in agreement with the EWG 25-12 assessment. Two fleet segments (PGP VL0008 and TM VL2440) reveal a value for CR/BER below 1, indicating signs of unprofitability with potential over-capitalisation, while according to the EWG 25-12 values, the PGP VL0008 segment is indicated to be in balance and the TM VL2440 out of balance.

No conclusion on trend assessment was presented by the MS so no comparisons were possible.

Return on Investment (ROI) and/or Return on Fixed Tangible Assets (RoFTA)

In the Latvian annual fleet report, ROI was calculated, where RoFTA was estimated by EWG 25-12. No comparison was possible on the value of the indicators.

Nonetheless, according to the EWG 25-12 assessment, the majority fleet segments reveal positive values for this indicator (except TM VL1218), indicating the segments are profitable in the long term.

No conclusion on trend assessment was presented by the MS so no comparisons were possible.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the MS annual fleet report the VUR Indicator was calculated as the ratio between the average effort per vessel in a fleet segment and the observed maximum effort (based on average days at sea of 10 most active vessels) for each of the fleet segments.

The comparison between VUR reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed some differences in the values but with similar indications of balance except of PGP VL0812 segment, for which the EWG 25-12 value indicates out of balance, while MS fleet report indicates in balance. One of the other three fleet segments (PGP VL0008) is indicated to be out of balance, and two fleet segments (TM VL1218 and TM VL2440) are indicated to be in balance.

No conclusion on trend assessment was presented by the MS so no comparisons were possible.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call, are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet balance was assessed for all 4 fleet segments using all biological, economic and technical indicators except SAR (SHI, ROI, CR/BER and VUR) for 2019-2023. The following categories of fishing vessels were excluded from the MS analysis:

- vessels over 40 meters operating in the Atlantic (area 27 and 34) due to the limited number of vessels and data confidentiality;
- coastal vessels listed in the Fleet Register not engaged in commercial fishing and involved only in fishing for self-consumption.

A traffic light table based on the indicators outputs is included in the fleet report but trends are not presented, as well as an overall statement on the balance of the fleet segments. However, MS stated in its fleet report that the measures to balance fleet segment VL2440, included in the Action plan to the fleet report provided in 2023 were in the implementation phase and the effect of the reduction of the segment should be evaluated in the following years.

Latvia did not present a calculation for the SAR indicator and no explanation as to why is given in the fleet report.

The EWG notes that where the indicators suggest an imbalance in biological indicators, the Member State considers that the fleet segment is also imbalanced and provides supporting information. Where individual economic indicators suggest an imbalance, the Member State also considers the relevant fleet segment to be in imbalanced and provides supporting information despite any discrepancies in the indicator values, which may be caused by the categories of fishing vessels not included in the MS analysis. However, the MS fleet report does not include an overall conclusion on the balance of the segments based on a combination of all indicators and therefore, a comparison with the EWG assumptions cannot be made.

Discrepancies in previous fleet reports.

The discrepancies between the STECF assessment of the balance between capacity and fishing opportunities relating to Latvia's fleet report submitted in 2024 have not been explicitly addressed in the fleet report submitted by 31 May 2025.

Structural overcapacity and profitability

MS fleet report identifies structural overcapacity for fleet segment TM VL1218 based on analysis of SHI, ROI and CR/BER indicators results noting that profitability of the segment is negatively impacted by excessive crew wages in 2023. Nevertheless, MS finds that ROI was positive from 2020 to 2022, and suggests that the investment has the potential to be profitable and efficient. There are no measures included in the fleet report to address the possible imbalance in the segment.

An action plan for segment VL2440 is currently being implemented. Analysis of economic indicators shows that other three fleet segments imply long-term and short-term profitability based on ROI and CR/BER.

Overview of action plans

Latvia has implemented:

- an action plan provided with the fleet report in 2019 to reduce fleet capacity for the VL2440 TM fleet segment through the permanent withdrawal from the fishing activity of 10 vessels (with a corresponding capacity of 1150 GT and 2881 kW), which were involved in the Baltic cod fishery. The timeframe for reducing fleet segment capacity was by the end of 2020.
- an action plan provided with the fleet report in 2023 to reduce fleet capacity for the VL2440 fleet segment through the permanent withdrawal from the fishing activity of 9 vessels (with a corresponding capacity of 1150 GT and 3500 kW), involved in sprat and herring fishery in the Baltic Sea. The timeframe for reducing fleet segment capacity was by the end of 2023.

Adjustment targets and tools

No new or revised action plan has been proposed with the fleet report submitted in 2025. The current action plan aims to achieve a 30% reduction of the vessels number in the fleet segment TM VL2440, up to 34% of the gross tonnage and up to 32% of the engine power by the end of 2023.

Number of vessels

No new or revised action plan has been proposed by the MS.

4.4.14 Lithuania (LTU)

Overview of indicator findings

There were 13 fleet segments in the Lithuanian fleet in 2023, of which 7 were active (5 in NAO and 2 in OFR). Of the 7 active fleet segments, landing data were provided for 7 segments while economic data were available to calculate the indicators for 4 aggregated fleet segments (3 in the NAO and 1 in the OFR). The Lithuanian fishing fleet consisted of 127 vessels, of which 65 (51.18%) were active and 62 (48.82 %) were inactive.

Sustainable Harvest Indicator (SHI)

Area 27

Out of 5 fleet segments active in 2023, SHI indicator values were available for all 5 fleet segments.

SHI indicator values for 2 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 3 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 90.68% of the total value of the reported landings in

2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (100%) fleet segments were *out of balance* with fishing opportunities.

Trends could be calculated for 3 segments:

- 3 (100%) segments displayed an *improving* trend.

OFR

Out of 2 fleet segments active in 2023, meaningful SHI indicator values were available for 2 fleet segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (100%) fleet segments were *in balance* with fishing opportunities.

Trends could be calculated for 2 segments:

- 2 (100%) segments displayed an *improving* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for all 7 active fleet segments in 2023 (5 for area 27 and 2 for the OFR). In accordance with the Commission guidelines, the EWG notes that the values indicate:

Area 27

- 1 (20%) fleet segment was *in balance* with fishing opportunities,
- 4 (80%) fleet segments were *out of balance* with fishing opportunities, 4 segments with 1 stocks-at-risk.

OFR

- 1 (100%) fleet segment was *in balance* with fishing opportunities,
- 1 (100%) fleet segment was *out of balance* with fishing opportunities, 1 segment with 1 stocks-at-risk.

Number of Overharvested Stocks (NOS)-Area27

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1	2		

Number of Overharvested Stocks (NOS)-OFR

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments		2		

Economic Dependency Indicator (EDI)-Area 27

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{msy} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2			3

Economic Dependency Indicator (EDI)-OFR

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{msy} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1	1		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

ROI and RoFTA indicators were available for 3 aggregated fleet segments in NAO and 1 in OFR. In accordance with the Commission guidelines, the EWG notes that the values indicate:

Area 27 RoFTA

- 2 segments were *in balance* with fishing opportunities,
- 1 segment was *out of balance* with fishing opportunities.

Trends were available for 3 fleet segments:

- 3 1 segment displayed an *improving* trend.
- 4 2 segments displayed a *deteriorating* trend.

OFR RoFTA

- 1 segment was *in balance* with fishing opportunities.

Trends were available for fleet segment:

- 1 segment displayed an *improving* trend.

Area 27 ROI

- 2 segments were *in balance* with fishing opportunities,
- 1 segment was *out of balance* with fishing opportunities.

Trends were available for 3 fleet segments:

- 2 segments displayed an *improving* trend.
- 1 segment displayed a *deteriorating* trend.

OFR ROI

- 1 segment was *in balance* with fishing opportunities.

Trends were available for fleet segment:

- 1 segment displayed an *improving* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was available for 3 aggregated fleet segments in NAO and 1 in OFR. In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

Area 27

- 2 segments were *in balance* with fishing opportunities,
- 1 segment was *out of balance* with fishing opportunities.

Trends were available for 1 fleet segment:

- 1 segment displayed *improving* trend.

OFR

- 1 segment was *in balance* with fishing opportunities.

Trends were available for the aggregated fleet segment:

- 1 segment displayed an *improving* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR₂₂₀)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for 5 fleet segments in NAO and 2 in OFR. In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

Area 27

- 4 segments were *in balance* with fishing opportunities,
- 1 segment was *out of balance* with its fishing opportunities.

Trends were available for 5 fleet segments:

- 3 segments displayed *no clear* trend,
- 2 segments displayed a *deteriorating* trend.

OFR

- 2 segments were *in balance* with fishing opportunities.

Trends were available for one fleet segment:

- 2 segments displayed *no clear* trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

The status of 7 fleet segments and trends for the Lithuanian fleet in the NAO and OFR regions is shown below. Based on indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, 5 out of 5 and 1 out of 2 fleet segments in the NAO and OFR regions respectively, indicate an imbalance according to at least one of the indicators (CR/BER, RoFTA, SAR, SHI, VUR).

All fleet segments in the NAO are indicated to be imbalanced according to at least one of the biological indicators (4 out of 5 fleet segments on SAR and 3 out of 5 fleet segments on SHI). In the OFR region, one segment is indicated to be out of balance according to the SAR indicator.

Both economic indicators (RoFTA and CR/BER) indicate imbalance for one fleet segment in the NAO.

One fleet segment in the NAO is indicted to be out of balance according to the VUR indicator.

Where indicator trends are available, most show an improvement, except the VUR indicator, for which no clear trend is indicated and for 2 fleet segments in the NAO, declining trends are indicated.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.14.1.

Table 4.4.14.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	insufficiently profitable
	borderline
	insufficient data

		Status 2023								Status 2023				
		Economic								Biological			Technical	
fleet segment / clustered segment	Nb of vessels	CR/BER	RoFTA	ROI	NP margin	NVA / FTE	fishing tech	vessel length	Nb of vessels	SAR	SHI	EDI	VUR	VUR ₂₂₀
LTU NAO DFN0812 NGI *	4						DFN	VL0812	4	1				
LTU NAO PG 0008 NGI	49						PG	VL0008	49	1				
LTU NAO TM 2440 NGI *	1						TM	VL1824	1	1				
LTU NAO TM 2440 NGI *	4						TM	VL2440	4	1				
LTU NAO TM 2440 NGI *	2						TM	VL40XX	2					
LTU OFR TM 40XX NEU *	2						DTS	VL40XX	2					
LTU OFR TM 40XX NEU *	3						TM	VL40XX	3	1				
total active	65													
total inactive	62													
% inactive in total	48.82%													

	improving
	deteriorating
	null/flat trend
	insufficient data
	no clear trend
	no data

		Trends 2019-2023												Trends 2019-2023			
		Economic												Biological		Technical	
fleet segment / clustered segment	Nb of vessels	CR/BER	RoFTA	ROI	NP margin	NVA / FTE	fishing tech	vessel length	Nb of vessels	SHI	EDI	VUR	VUR ₂₂₀				
LTU NAO DFN0812 NGI *	4						DFN	VL0812	4								
LTU NAO PG 0008 NGI	49						PG	VL0008	49								
LTU NAO TM 2440 NGI *	1						TM	VL1824	1								
LTU NAO TM 2440 NGI *	4						TM	VL2440	4								
LTU NAO TM 2440 NGI *	2						TM	VL40XX	2								
LTU OFR TM 40XX NEU *	2						DTS	VL40XX	2								
LTU OFR TM 40XX NEU *	3						TM	VL40XX	3								
total active	65																
total inactive	62																
% inactive in total	48.82%																

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicators

A comparison of indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are given in Annex II.

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report, the SHI has been provided for the reference year 2023 for those fleet segments which according to the MS, the value is meaningful. This was the case for three fleet segments in the NAO and for one clustered fleet segment operating in the OFR. Note that according to the calculations of the EWG 25-12, the SHI values for five fleet segments can be assessed meaningfully (3 in the NAO and 2 unclustered segments in the OFR region).

For all fleet segments for which SHI values are reported by the MS, the indicator values are lower than those computed by the EWG. Nevertheless, this discrepancy does not affect the interpretation of the SHI with respect to threshold as defined in the Guidelines. In accordance with the EWG 25-12, the three fleet segments in the NAO with a meaningful SHI value are indicated to be imbalanced, while the clustered fleet segment in the OFR is indicated to be in balance with fishing opportunities according to its SHI.

Trends for the SHI are presented in a graph and are in accordance with the trends computed by the EWG 25-12.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR has been provided for the reference year 2023 for all fleet segments operating in the NAO and OFR.

The comparison between SAR reported in the MS annual fleet report and those estimated by the EWG 25-12 were in agreement.

Ratio between Current Revenue and Break-Even Revenue (CR/BER) stocks

In the MS annual fleet report the CR/BER ratio has been provided for the reference years 2019-2023 for 4 aggregated fleet segments.

A comparison between indicator values in the MS Fleet report and the values for equivalent fleet segments as estimated by EWG 25-12 for 2023 show some discrepancies. The fleet segment NAO DFN VL 0812, which comprises four vessels, generated negative capital productivity in 2023 with a declining (deteriorating) trend due to its dependence on of Baltic cod and the fishery for cod in the Baltic Sea is closed. The MS annual fleet report also indicates that the segment NAO DFN VL0812 is unprofitable with potential over-capitalisation. The other three segments NAO PG VL0008, NAO TM VL2440 and OFR TM VL40XX are indicated to be in balance with an increasing (improving) trend.

Graphs and relevant explanations are included in the MS Annual Fleet Report to outline the trends for the indicator.

Return on Investment (ROI) and/or Return on Fixed Tangible Assets (RoFTA)

In the MS annual fleet report ROI and RoFTA indicators are provided for the reference years 2019-2023 for 4 aggregated fleet segments. ROI is estimated for the same fleet segments as RoFTA.

A comparison between ROI and RoFTA indicator values in the MS Fleet report and the values for equivalent fleet segments as estimated by EWG 25-12 for 2023 show some discrepancies.

Fleet segments NAO DFN VL0812 is indicated to be out of balance according to RoFTA and ROI with decreasing (deteriorating) trends. The segments NAO PG VL0008, NAO TM VL2440 and OFR TM VL40XX. are indicated to be in balance with increasing (improving) trends.

Graphs and relevant explanations are included in the MS Annual Fleet Report to outline the trends for the indicator.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR₂₂₀)

In the MS annual fleet report the VUR Indicator was calculated as the ratio between the average effort per vessel in a fleet segment and the observed maximum effort actually expended by a vessel in the segment for each length group and gear type. The MS says that the theoretical maximum days at sea (220 days) cannot be used for the small-scale fleet segments due to part time/seasonal fishing activities and thus, it did not calculate the VUR₂₂₀.

A discrepancy has been observed in the values of VUR between the MS annual fleet report and the ones estimated from EWG 25-12. For some segments, this could be because the MS used a clustered fleet segmentation. The fleet segments' balance status are indicated to be different. EWG 25-12 values indicate that the majority of the fleet segments are in balance (except NAO PG VL0008) while MS fleet report assessed 3 fleet segments as borderline and 2 fleet segments (NAO PG VL0008 and NAO DFN VL0812) out of balance.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted for 2023 provides an assessment on the balance between capacity and fishing opportunities by fleet segment in accordance with the DCF fleet segmentation and in line with the indicators and methodology as specified in the Commission guidelines (COM (2014) 545).

The fleet report includes a section that describes the development of the capacity of the Lithuanian fishing fleet in recent years followed by three extensive sections on the biological (SHI, SAR), economic (RoFTA, ROI, CR/BER) and technical indicators (inactive vessels and VUR). In section five, a traffic lights table is presented with an overall conclusion classifying each fleet segment into one of the following categories:

- in balance,
- short term imbalance (borderline),
- structural imbalance,

followed by a more detailed interpretation by fleet segment.

Based on the 2023 data and the trends over the period 2019-2023, the fleet report does not identify structural imbalance for any of the fleet segment. Three fleet segments are identified to have a short-term imbalance (NAO PG0008; NAO DFN0812; NAO TM2440), however,

given the improving trends of the economic indicators the MS categorizes this fleet segments as short-term imbalanced.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information.

Discrepancies in previous fleet reports

There were no significant discrepancies between the STECF assessment of the balance between capacity and fishing opportunities relating to MS's previous fleet report. There were no significant issues raised by the previous EWG.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The EWG 25-12 notes MS fleet report identifies structural overcapacity based on biological, economic and technical indicators.

The EWG notes that the long-term and short-term fleet profitability are considered by the MS when identifying imbalanced fleet segments. For 2023 no structural overcapacity was identified by the MS.

Overview of action plans

The action plan was provided with MS fleet report relating to the fleet segment NAO TM VL2440 operating in Baltic Sea, which are reliant on the small pelagic species (mainly sprat and herring). The plan envisages to reduce the capacity by implementing a scraping scheme with public compensation for the permanent cessation of fishing activities. This is a continuation of the previous action plan (2024) for which the target was partially achieved.

Adjustment targets and tools

In the action plan, the need to permanently scrap one vessel in the fleet segment NAO TMVL2440 is proposed together with the measures to be implemented and the associated timeframe for both the implementation and decommissioning.

Number of vessels

The action plan submitted by the MS concerns one vessel to be withdrawn in 2025 from the NAO TM VL2440 fleet segment.

4.4.15 Malta (MLT)

Overview of indicator findings

There were 24 fleet segments in 2023, of which 19 were active. Of the 19 active segments, landings data was provided for 10 aggregated fleet segments and economic data were provided aggregated in 10 fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2023, landings in value have been provided aggregated in 10 fleet segments and SHI indicator values were available for 9.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 7 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that the 2 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 39.09% of the total value of the landings in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 fleet segment was out of balance with fishing opportunities;
- 1 fleet segment was in balance with fishing opportunities.

SHI trends are available for 2 segments.

- 1 segment show a **flat** trend
- 1 segment show **no clear** trend

Stocks at Risk Indicator (SAR)

SAR indicator was available for 10 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 4 fleet segments were **in balance** with fishing opportunities
- 6 fleet segments were **out of balance** with fishing opportunities:
 - 1 fleet segment with 2 stocks-at-risk.
 - 5 fleet segment with 1 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2	3	3	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	8		1	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 10 clustered segments: In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 segment was *in balance* with fishing opportunities,
- 9 segments were *out of balance* with fishing opportunities.

Trends could be calculated for 5 segments:

- 2 segments displayed an *improving* trend,
- 3 segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER for 2023 was calculated for 10 clustered segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 segment was *in balance* with fishing opportunities,
- 9 segments were *out of balance* with fishing opportunities.

Trends could be calculated for 5 clustered segments:

- 1 segment displayed an *improving* trend,
- 3 segments displayed a *deteriorating* trend
- 1 segment displayed *no clear* trend

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR for 2023 was calculated for 19 segments* In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 10 segments were *in balance* with fishing opportunities,
- 9 segments were *out of balance* with fishing opportunities.

Trends could be calculated for 10 segments:

- 2 segments displayed a *deteriorating* trend,
- 4 segments displayed *no clear* trend
- 4 segments displayed a *null/flat* trend.

Inactive Fleet Indicator

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends from 2019 to 2023, and according to the criteria in the Commission guidelines, most fleet segments are indicated to be out of balance with fishing opportunities. Only one clustered fleet segment (PS 1824 NGI *) is fully in balance for both the biological/technical indicators and the economic indicators.

All the other clustered fleet segments seem to be out of balance according to the economic indicators, while the segments DTS2440 NGI * and HOK1218 NGI* are indicted to be in balance according to the NVA/FTE indicator values.

In terms of biological indicators, MGO0612 NGI *, PGP0006 NGI *, and PMP0006 NGI * are indicated to be in balance according to the SAR indicator. However, these segments are indicated to be out of balance by the values for all the economic indicators.

The trend for the Ratio between Current Revenue and Break-Even Revenue (CR/BER) shows a decline for HOK1824 NGI *, PGP0612 NGI * and PS1824 NGI * and an increase only for PGP0006 NGI *. For Return on Fixed Tangible Assets (RoFTA), there is a clear decline for MGO1218 NGI *, PGP0006 NGI *, HOK1824 NGI * and PGP0612 NGI *, while only DTS2440 NGI * shows an increasing (improving) trend.

Most segments show no clear trend or have a flat or null trend for the biological and technical indicators (SHI, EDI, and VUR). Only DTS2440 NGI shows a decrease based on the Economic Dependency Indicator (EDI). Moreover, DTS2440, NGI, and PS1824 NGI follow the same declining trend for the Vessel Use Indicator (VUR).

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.15.1.

Table 4.4.15.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	bordeline
	insufficiently profitable
	insufficient data

		Status 2023							Status 2023				
		Economic							Biological		Technical		
Fleet segment/ clustered segment	No. vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment	No. vessels	SAR	SHI	EDI	VUR	
							MLT MBS DTS1824 NGI *	9					
MLT MBS DTS2440 NGI *	14						MLT MBS DTS2440 NGI *	5	1				
MLT MBS HOK1218 NGI *	13						MLT MBS HOK1218 NGI *	13	1				
MLT MBS HOK1824 NGI *	16						MLT MBS HOK1824 NGI *	16	1				
MLT MBS MGO0612 NGI *	6						MLT MBS MGO0612 NGI *	6					
							MLT MBS MGO1218 NGI *	2	1				
MLT MBS MGO1218 NGI *	3						MLT MBS MGO1824 NGI *	1					
MLT MBS PGP0006 NGI *	273						MLT MBS PGP0006 NGI *	273					
							MLT MBS DFN0006 NGI *	1	2				
							MLT MBS DFN0612 NGI *	2					
							MLT MBS FPO0612 NGI *	1					
							MLT MBS HOK0006 NGI *	3					
							MLT MBS HOK0612 NGI *	46					
MLT MBS PGP0612 NGI *	175						MLT MBS PGP0612 NGI *	122					
MLT MBS PMP0006 NGI *	29						MLT MBS PMP0006 NGI *	29					
MLT MBS PMP0612 NGI *	107						MLT MBS PMP0612 NGI *	107	1				
							MLT MBS PS1218 NGI *	2					
							MLT MBS PS 1824 NGI *	2					
MLT MBS PS 1824 NGI *	5						MLT MBS PS 2440 NGI *	1					
Total Active	641												
Total Inactive	187												
% Inactive	22.6												

	improving
	deteriorating
	null/flat trend
	insufficient data
	no clear trend
	no data

Fleet segment/ clustered segment		No. vessels		Trends 2019-2023					Fleet segment		No. vessels		Trends 2019-2023		
				Economic									Biological	Technical	
				CR/BER	RoFTA	ROI	NP margin	NVA/FTE					SHI	EDI	VUR
MLT MBS DTS2440 NGI *	14						MLT MBS DTS1824 NGI *	9							
							MLT MBS DTS2440 NGI *	5							
MLT MBS HOK1218 NGI *	13						MLT MBS HOK1218 NGI *	13							
MLT MBS HOK1824 NGI *	16						MLT MBS HOK1824 NGI *	16							
MLT MBS MGO0612 NGI *	6						MLT MBS MGO0612 NGI *	6							
							MLT MBS MGO1218 NGI *	2							
							MLT MBS MGO1824 NGI *	1							
MLT MBS MGO1218 NGI *	3						MLT MBS MGO1824 NGI *	1							
MLT MBS PGP0006 NGI *	273						MLT MBS PGP0006 NGI *	273							
							MLT MBS DFN0006 NGI *	1							
							MLT MBS DFN0612 NGI *	2							
							MLT MBS FPO0612 NGI *	1							
							MLT MBS HOK0006 NGI *	3							
							MLT MBS HOK0612 NGI *	46							
							MLT MBS PGP0612 NGI *	122							
MLT MBS PMP0006 NGI *	29						MLT MBS PMP0006 NGI *	29							
MLT MBS PMP0612 NGI *	107						MLT MBS PMP0612 NGI *	107							
MLT MBS PS 1824 NGI *	5						MLT MBS PS1218 NGI *	2							
							MLT MBS PS 1824 NGI *	2							
							MLT MBS PS 2440 NGI *	1							

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).

Source: Own elaborations.

Comparison of indicator values

A comparison of indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 is provided in Annex II. Key points for each indicator are listed below.

Sustainable Harvest Indicator (SHI)

No SHI values were presented in the MS fleet report for the reference year 2023. The reason for the absence of SHI indicators is unknown, although F/FMSY values are reported for 2022 and 2023 for many stocks fished by the Maltese fleets.

Stocks at Risk Indicator (SAR)

The MS annual fleet report did not provide information for SAR in the reference year 2023. A general statement notes that the SAR indicator is not available for Malta for 2012–2024, as the Maltese fleet did not exploit any stocks at high biological risk as defined by the 2014 indicator guidelines (COM (2014) 545 Final), except for one stock: swordfish in the

Mediterranean, which is regulated by ICCAT. The fleets fishing this stock are PGP-VL0612, HOK-VL1218, and HOK-VL1824. All these fleet segments are indicated to be out of balance based on the SAR indicator, along with many other segments indicated to be out of balance in the EWG 25-12 report. It is also stated that the landings threshold is likely overestimated, as it does not account for landings from non-EU fleets. Similarly, in the summary table of the MS fleet report, the SAR indicator is shown as not applicable for the years 2017–2024.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER values reported in the MS annual fleet report and those estimated by EWG 25-12 revealed similar results. The following segments were indicated to be out of balance in the annual fleet report: DTS2440 NGI*, HOK1824 NGI*, MGO0612 NGI*, PGP0006 NGI*, PGP0612 NGI*, PMP0006 NGI*, and PMP0612 NGI*. Out of 10 clustered segments, 7 were indicated to be out of balance according to the CR/BER indicator.

The results of EWG 25-12 are partially consistent with those presented in the Member State's annual report. Among the ten clustered segments, nine are indicated to be out of balance, while only PS1824 NGI* is indicated as in balance based on the CR/BER economic indicators.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

A comparison between the ROI/RoFTA indicators in the MS Report and the EWG 25-12 Report was not possible because the Member State provided values for RoI indicator, whereas the EWG only had the data to compute RoFTA.

According to RoI, the following clustered segments were indicated to be out of balance in the fleet report: DTS2440 NGI, HOK1824 NGI, MGO1824 NGI, PGP0006 NGI*, PGP0612 NGI, PMP0006 NGI, and PMP0612 NGI.

According to the EWG 25-12 values for RoFTA, all clustered segments except the segment PS1824 NGI* are indicated to be out of balance.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The comparison between the VUR indicator reported in the MS annual fleet report and those estimated within the framework of EWG 25-12 revealed similar results. The data in the MS annual fleet report appear to be aggregated into fleet segment clusters. However, the VUR indicator results in the fleet report are consistent with the non-aggregated results from EWG 25-12. Of the 10 fleet segment clusters, 6 are indicated to be in balance and 4 out of balance. The clusters that are out of balance are PMP0006, PMP0612, PGP0006, and PGP0612, as also identified as such in the MS annual fleet report.

Inactive Fleet Indicator

The Inactive fleet indicator differs between the MS report and the EWG25-12 report. There is an agreement for vessel length category VL2440 as a segment that it's out of balance but the MS indicates that all other vessel length categories are in balance, while the EWG25-12 indicates that 4 out of 5 categories appear to be out of balance.

Data on the active and inactive fleet are provided separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The EWG 25-12 notes that the fleet report submitted in 2025 provides indicator values separately by fleet segment based on DCF information and for the economic indicators specified in the Commission guidelines (COM (2014) 545). The EWG notes that in some cases where the indicators suggest a situation of imbalance, but the Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information and analyses.

However, the report does not include biological indicators, mainly due to data limitations. This does not align with the observations of the EWG, which was able to calculate biological indicators for 2023. Instead, the Member State reports the SHI indicators as calculated by the EWG 23-14 as well as F/FMSY values for several stocks, but these are not used by the Member State in its assessment of the balance between capacity and fishing opportunities.

The Member State's report includes the VUR, CR/BER, and RoFTA aggregated in clustered segments, as specified in the Commission Guidelines. According to the economic and technical indicators, only three clustered segments are indicated to be in balance with fishing opportunities (PS1824 NGI*, MGO0612 NGI*, and HOK1218 NGI*), while the rest are indicated to be out of balance. Furthermore, this partially aligns with the EWG 25-12 report, which indicates that only PS1824 NGI* is in balance with fishing opportunities and that nine cluster segments are out of balance. The Member State provides an updated Action Plan, but EWG 25-12 is unable to assess the likely effects of the proposed measures on the fleet segments that appear to be out of balance.

Discrepancies in previous fleet reports

The Maltese fleet report has not been adjusted in accordance with all previous EWG comments regarding the assessment of balance and capacity of fleet segments and the structure and content of the Action Plan.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this as whether fleet segments are out of balance with fishing opportunities. The fleet report states that the main indicators of balance for the Maltese fleet are the economic and technical indicators, given the lack of information on biological indicators. The report notes that some segments—which are the same as those that the EWG 25-12 indicate to be out of balance according to the economic and technical indicator values, show imbalance over time and may benefit from an Action Plan.

Overview of action plan

The existing action plan and the new measures added are provided in Annex I of the fleet report submitted by 31 May 2025. The fleet report states that the segments which are indicated to be imbalanced over time, may benefit from the application of an Action Plan. The proposed action plan is largely a statement of intent to improve monitoring activities through the adoption of new regulatory frameworks and the adoption of equipment to register fishing vessel activity and monitor catches, and includes, amongst others, the following actions:

- equip all commercial fishing vessels with VMS or a GPRS tracking device

- develop a regulatory framework to improve the economic data collection
- develop a monitoring program to analyze the respective biological indicators
- utilize the activity level indicator for some segments to identify those ones that may exhibit economic sustainability and demonstrate a positive trend in economic development.
- develop a regulation to oblige fishers to weigh landings at landing sites
- install tablets of fishing vessel for the transmission of catch data
- develop a policy framework for diversification of the fishing fleet
- improve communication with fishing sector
- develop and implement a Fisheries Information System
- EWG 25-12 is unable to assess the likely effects of the proposed measures.

Adjustment targets and tools

The adjustment targets and tools are not specifically described and the timeframe for implementation is to continue until 2027.

Number of vessels

The Action plan does not specify the number of vessels targeted by the plan. Most measures relate to the entire Maltese fishing fleet although two actions (prohibition of fishing in designated days and weeks from 15th February to 15th July and lampara sampling plan to scientifically assess the catch composition of the lampara fishery to revise the reporting of the lampara catches) are aimed at purse seine, trammel and gillnet fleets.

4.4.16 Netherlands (NLD)

Overview of indicator findings

Area 27

There were 32 fleet segments in 2023, of which 26 were active. Of the 26 active segments, landings and economic data were provided aggregated for 11 fleet segments.

Sustainable harvest indicator (SHI)

Out of 26 fleet segments active in 2023, landings in value have been provided aggregated in 11 fleet segments and SHI indicator values were available for 11.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 4 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that the 7 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 77.57% of the total value of the landings in 2023 provided by MS.

The SHI indicator was available for 6 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5 (83%) fleet segments were in **balance** with fishing opportunities,
- 1 (17%) fleet segments were out **of balance** with fishing opportunities.

Trends were available for the six fleet segments:

- 4 fleet segments displayed a **improving** trend;
- 2 fleet segments displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 11 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 7 (64%) fleet segments were in **balance** with fishing opportunities,
- 4 (36%) fleet segments were out **of balance** with fishing opportunities:
 - 1 fleet segment with 3 stocks-at-risk,
 - 3 fleet segments with 1 stock-at-risk.

Trends could not be calculated.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	7	4		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{msy} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	10			1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The RoI indicator was available for 8 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (25%) segments were **in balance** with fishing opportunities,
- 6 (75%) segments were **out of balance** with fishing opportunities.

Trends could be calculated for 8 segments:

- 3 segments displayed an **improving** (improving) trend,
- 5 segments displayed a **deteriorating** trend.

The RoFTA indicator was available for all 11 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (28%) segments were in **balance** with fishing opportunities,

- 8 (72%) segments were out *of balance* with fishing opportunities.

Trends were calculated for 11 segments:

- 4 segments displayed an *improving* trend,
- 7 segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 11 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (18%) segments were in *balance* with fishing opportunities,
- 9 (82%) segments were out *of balance* with fishing opportunities;

Trends were calculated for 11 segments:

- 2 segments displayed an *improving* trend,
- 6 segments displayed a *deteriorating* trend,
- 3 segments displayed *no clear* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR₂₂₀)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR²²⁰ is not analysed here.

The VUR indicator was available for 26 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5 (19%) segments were in *balance* with fishing opportunities,
- 21 (81%) segments were *out of balance* with fishing opportunities.

Trends were calculated for 23 segments:

- 18 segments displayed *no clear* trend;
- 1 segment displayed a *null/flat* trend;
- 4 segments displayed a *deteriorating* trend.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call, are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, the majority of fleet segments are indicated to be out of balance with fishing opportunities for most economic and technical indicators. Biological indicators indicate an imbalance in 1 fleet segment for both SAR and SHI (TM VL40XX), with no clear trend for SHI. The potential imbalance observation is supported by economic indicators (CR/BER, RoI, and RoFTA), all of which indicate a deteriorating trend and a worsening situation.

The biological and economic indicators indicate that TBB VL1218 is in balance, but the VUR indicator indicates imbalance. The technical and biological indicators suggest that DTS

VL1824 and PG VL1012 are in balance, but the opposite is the case for the economic indicators.

Although the SAR and SHI indicate PG VL0010 is in balance, the fleet segment, which makes up a significant portion of the entire Dutch fleet (147 of 468 active vessels in 2023), shows short and long-term economic unprofitability with a deteriorating trend for CR/BER, RoI, RoFTA and an unclear trend for VUR.

One other important segment in terms of number of vessels (TBB VL1824 with 131 vessels) also indicates imbalance according to CR/BER, RoFTA and VUR values, with deteriorating trend for RoI, and no clear trend for CR/BER, SHI and VUR.

For fleet segments DFN VL1824, DTS VL2440 and PG VL1012 some signs of imbalance are indicated as follows:

- for DFN VL1824: CR/BER, RoFTA and VUR values indicate imbalance and deteriorating trends for CR/BER and RoFTA, but with a value for SAR indicating “in balance”;
- for DTS VL2440: SAR, CR/BER and RoI values indicate imbalance and no clear trend for CR/BER, but with a value for VUR indicating “in balance” and an improving trend for RoFTA;
- for PG VL1012: CR/BER, RoFTA and RoI values indicate imbalance and deteriorating trends for CR/BER, RoFTA and RoI, but with values for SHI and SAR indicating “in balance” and an improving trend for SHI.

A comparison between indicator values provided in the MS Fleet report and values for equivalent fleet segments, as estimated by EWG 25-12, reveals similar results for most indicators for the segments for which a comparison can be made. The majority of indicators show similar values and trends, except for the SAR indicator which indicates different status with respect to balance / imbalance for 3 of the 11 fleet segments (TBB-VL2440, TBB-VL40XX and DTS-VL2440).

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.16.1.

Table 4.4.16.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Status 2023							Status 2023			
Fleet segment/ clustered segment	Nb of vessels	Economic					Fleet segment	Nb of vessels	Biological			Technica
		CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE			SAR	SHI	EDI	VUR
NLD NAO DFN1824 NGI*	19						NLD NAO DFN VL1218 NGI	2				
							NLD NAO DFN VL1824 NGI	2				
							NLD NAO FPO VL1218 NGI	3				
							NLD NAO FPO VL1824 NGI	4				
							NLD NAO FPO VL2440 NGI	1				
							NLD NAO HOK VL1218 NGI	1				
						NLD NAO MGO VL1824 NGI	6					
NLD NAO DTS1824 NGI*	10						NLD NAO DTS VL1824 NGI	10				
NLD NAO DTS2440 NGI*	30						NLD NAO DTS VL2440 NGI	30	1			
NLD NAO PG0010 NGI*	147						NLD NAO PG VL0010 NGI	147				
NLD NAO PG1012 NGI*	14						NLD NAO PG VL1012 NGI	14				
NLD NAO TBB0010 NGI*	21						NLD NAO DRB VL0010 NGI	8				
							NLD NAO DTS VL0010 NGI	3				
							NLD NAO DTS VL1012 NGI	2				
							NLD NAO TBB VL0010 NGI	6				
							NLD NAO TM VL0010 NGI	1				
							NLD NAO TBB VL1012 NGI	1				
NLD NAO TBB1218 NGI*	32						NLD NAO DRB VL1218 NGI	1				
							NLD NAO DRB VL1824 NGI	7				
							NLD NAO DRB VL2440 NGI	11				
							NLD NAO DRB VL40XX NGI	5				
							NLD NAO TBB VL1218 NGI	8				
							NLD NAO TBB VL1824 NGI	131				
NLD NAO TBB1824 NGI*	131						NLD NAO TBB VL2440 NGI	15	1			
NLD NAO TBB40XX NGI*	41						NLD NAO TBB VL40XX NGI	41	3			
NLD NAO TM40XX NGI*	8						NLD NAO TM VL40XX NGI	8	1			
Total active vessels	468											
Total inactive vessels	212											
% of inactive in total	31%											

		Trends 2019-2023							Trends 2019-2023		
Fleet segment/ clustered segment	Nb of vessels	Economic					Fleet segment	Nb of vessels	Biological		Technical
		CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE			SHI	EDI	VUR
NLD NAO DFN1824 NGI*	19						NLD NAO DFN VL1218 NGI	2			
							NLD NAO DFN VL1824 NGI	2			
							NLD NAO FPO VL1218 NGI	3			
							NLD NAO FPO VL1824 NGI	4			
							NLD NAO FPO VL2440 NGI	1			
							NLD NAO HOK VL1218 NGI	1			
						NLD NAO MGO VL1824 NGI	6				
NLD NAO DTS1824 NGI*	10						NLD NAO DTS VL1824 NGI	10			
NLD NAO DTS2440 NGI*	30						NLD NAO DTS VL2440 NGI	30			
NLD NAO PG0010 NGI*	147						NLD NAO PG VL0010 NGI	147			
NLD NAO PG1012 NGI*	14						NLD NAO PG VL1012 NGI	14			
NLD NAO TBB0010 NGI*	21						NLD NAO DRB VL0010 NGI	8			
							NLD NAO DTS VL0010 NGI	3			
							NLD NAO DTS VL1012 NGI	2			
							NLD NAO TBB VL0010 NGI	6			
							NLD NAO TM VL0010 NGI	1			
							NLD NAO TBB VL1012 NGI	1			
NLD NAO TBB1218 NGI*	32						NLD NAO DRB VL1218 NGI	1			
							NLD NAO DRB VL1824 NGI	7			
							NLD NAO DRB VL2440 NGI	11			
							NLD NAO DRB VL40XX NGI	5			
							NLD NAO TBB VL1218 NGI	8			
							NLD NAO TBB VL1824 NGI	131			
NLD NAO TBB1824 NGI*	131						NLD NAO TBB VL2440 NGI	15			
NLD NAO TBB40XX NGI*	41						NLD NAO TBB VL40XX NGI	41			
NLD NAO TM40XX NGI*	8						NLD NAO TM VL40XX NGI	8			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

A comparison of indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are given in Annex II. The majority of indicators show similar values and trends for SHI and SAR, except for SAR in 3 fleet segments. Points of note for each indicator are listed below.

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report the SHI indicator has been provided for the reference year 2023 for six fleet segments.

The comparison between SHI reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 indicated the same status with respect to balance/imbalance for all fleet segments. Five fleet segments (PG-VL0010-NGI, PG-VL1012-NGI, TBB-VL2440-NGI, TBB-VL40XX-NGI and DTS-VL1824-NGI) are indicated to be in balance with fishing opportunities whereas fleet segment TM-VL40XX-NGI is indicated to be out of balance. Trends are the same for both the MS annual fleet report and the EWG 25-12 estimates indicating a declining trend for PG-VL1012-NGI, TBB-VL2440-NGI, TBB-VL40XX-NGI and DTS-VL1824-NGI) and no trend for PG-VL0010-NGI and TM-VL40XX-NGI. EWG 25-12 values indicate that DTS-VL2440-NGI is in balance with fishing opportunities with no trend, while no information was available in the MS report.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR indicator has been provided for the reference year 2023 for eleven fleet segments.

Seven fleet segments were found to be in balance and one fleet segment was indicated to be out of balance in both MS annual fleet report and EWG 25-12. TBB-VL2440, TBB-VL40XX and DTS-VL2440 were indicated to be in balance in the MS annual fleet report but out of balance according to the EWG 25-12 indicator values.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 indicated similar values for all segments. All fleet segments are indicated to be out of balance for CR/BER with the exception of TBB VL1218 and TBB VL40XX.

CR/BER values are provided for the period 2018-2023 accompanied by trend indication (calculated over the last five years of data) for all segments. A non-significant trend (less than a 5% change between the start and end of the time period) is indicated for all 11 aggregated fleet segments. Therefore, no comparison on the trend was merited.

Trends based on EWG 25-12 calculations for the 11 segments were as follows:

- segments indicated an improving trend (DTS VL1824 and TBB VL2440),
- segments indicated a deteriorating trend (DFN VL1824, PG VL0010, PG VL1012, TBB VL1218, TBB VL40XX and TN VL40XX),
- segments displayed no clear trend (DTS VL2440, TBB VL0010 and TBB VL1824).

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the Dutch annual fleet report, both ROI and RoFTA were calculated. A comparison between indicator values in MS Fleet report and data estimated by EWG 25-12 revealed the same outputs for all values. Three fleet segments (DTS VL2440, TBB VL1218 and TBB VL40XX) are in balance for RoFTA and eight segments are indicated to be out of balance (DFN VL1824, DTS VL1824, PG VL0010, PG VL1012, TBB VL0010, TBB VL1824, TBB VL2440 and TM VL40XX).

In the Dutch annual fleet report RoI and RoFTA values for the period 2018-2023 are provided accompanied by trend (calculated over the last five years of data) indication for 1 segment (DFN VL1824) which indicates a deteriorating trend for RoI. Non-significant trends for RoI are indicated for the other 10 segments.

Trends for RoFTA based on EWG 25-12 calculations for the 11 segments were as follows:

- segments displayed an improving trend (DTS VL1824, DTS VL2440, TBB VL0010 and TBB VL2440),
- segments displayed a deteriorating trend (DFN VL1824, PG VL0010, PG VL1012, TBB VL1218, TBB VL1824, TBB VL40XX and TM VL40XX).

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The comparison between VUR reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed the same outputs for all values of the comparable segments.

In the MS annual fleet report, the VUR indicator was calculated as the ratio between days at sea and maximum observed days at sea for each length group and gear type. A table reporting the maximum observed days at sea (based on the average days at sea of the 10 most active vessels) per fleet segment was included in the MS annual fleet report (Table on page 17 of the MS fleet report). The fleet report provides values for the years 2018–2024, and the 2023 values showed the same outputs as the EWG 25–12 estimates.

Trend assessment (calculated over the last six years of data) for VUR was provided by the MS and indicated a non-significant trend for all segments except the TBB VL0010 and TM VL40XX segments which show no trend.

Trends based on EWG 25-12 calculations based on VUR for the 23 fleet segments were as follows:

- 18 segments displayed **no clear** trend;
- 1 segment displayed a **null/flat** trend;
- 4 segments displayed a **deteriorating** trend.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call, are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The EWG 25-12 notes the following:

The fleet report submitted in 2025 provides indicator values separately by fleet segment based on DCF information and for all the indicators specified in the Commission guidelines (COM (2014) 545).

A traffic light table based on the indicators outputs and trends is included in the fleet report. According to the fleet report, the Member State has determined that only the fleet segment TM 40XX is "out of balance" with fishing opportunities in terms of both biological and economic indicators. However, both the Dutch fleet report and observations by EWG 25-12 reveal that some of the fleet segments are indicated to be imbalanced based on the values and trends of economic indicators. In such cases, the Member State provided supporting information for the imbalanced fleet segments.

No action plan for fleet segments assessed by the Member State to be "out of balance" is included in the fleet report and no rationale behind the lack of an action plan is included.

The Netherlands' fleet report includes details on the capacity outcomes of the decommissioning scheme implemented in 2023. However, point 9 of the Commission guidelines COM (2014) 545, which outlines additional information that should be included, is still not fully followed by the report.

Discrepancies in previous fleet reports.

There were no significant discrepancies for the biological and the economic indicators between the STECF assessment of the balance between capacity and fishing opportunities relating to MS's previous fleet report.

No action plan was provided for segments that were indicating some imbalance without an explicit explanation.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The long-term and short-term profitability estimates on the fleet and by fleet segments are provided in the fleet report based on RoI, RoFTA and CR/BER values.

The assessment in the fleet report suggests a deteriorating situation with long-term unprofitability for the Dutch fleet, indicated by a declining trend for both RoI and RoFTA. The exceptions are fleet segment DTS VL2440, which according to CR/BER is indicated to be unprofitable in the short term and fleet segments TBB VL1218 and TBB VL40XX indicated as long-term profitable based on the values for RoI and RoFTA for 2023 but with a deteriorating trend for both indicators. According to the fleet report, the Dutch fleet's poor economic performance in 2023 can be attributed to high fuel prices, the poor catchability of some target species, and fish prices that are insufficient to cover the increased expenses.

The EWG 15-12 estimates for CR/BER by segment indicate short-term unprofitability for all fleet segments (except TBB VL1218 and TBB VL40XX) with deterioration trend for six fleet segments (DFN VL1824, PG VL0010, PG VL1012, TBB VL1218, TBB VL40XX and TM VL40XX).

Two fleet segments (PG VL0010 and PG VL1012) are indicated to be “out of balance” according to CR/BER and RoFTA values, with a deterioration trend for all of them. One fleet segment (TBB VL0010) is indicated to be “out of balance” according to CR/BER, RoFTA and VUR values, with a deteriorating trend for VUR and no clear trend for CR/BER. Two segments (DFN VL1824 and TBB VL1824) are indicated to be “out of balance” according to the values for CR/BER, and VUR, suggesting short term unprofitability with a deteriorating trend or no clear according to CR/BER and VUR. One fleet segment (TBB VL2440) demonstrates a short and long-term unprofitability in 2023, but in balance for VUR and with an improving trend for CR/BER, RoI and RoFTA. The other assessed fleet segments are found to be unprofitable for at least one of the economic or technical indicators or are showing a deterioration trend.

Adjustment targets and tools

No new or revised action plan was proposed.

Number of vessels

No new or revised action plan was proposed.

Overview of action plans

No new or revised action plan was proposed.

4.4.17 Poland (POL)

Overview of indicator findings

Area 27

There were 19 fleet segments in 2023, of which 14 were active. Of the 14 active segments, weight of landings was provided aggregated by 9 segments, value of landings and economic data were provided aggregated by 7 fleet segments. The Polish fishing fleet in 2023 consisted of 825 vessels. Of these, 790 vessels (95.8%) were active, while 35 vessels (4.2%) were inactive.

Sustainable harvest indicator (SHI)

Out of 14 fleet segments active in 2023, landings in value have been provided aggregated in 8 fleet segments and SHI indicator values were available for 7.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 3 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 4 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 71.97% of the total value of the landings in 2023 provided by MS.

In accordance with the Commission guidelines, the EWG notes that the SHI values for 2023 indicate:

- 4 segments were **out of balance** with fishing opportunities.

The time series of SHI values were available for 3 fleet segments, two of them were **decreasing** (improving) and one was **increasing** (deteriorating).

Stocks at Risk Indicator (SAR)

SAR indicator was available for 8 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the SAR values for 2023 indicate:

- 1 (12%) segment was **in balance** with fishing opportunities,
- 7 (88%) segments were **out of balance** with fishing opportunities (2 fleet segments with 3 stocks-at-risk, 1 fleet segments with 2 stocks-at-risk, 4 fleet segments with 1 stock-at-risk).

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	3	4		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	3	2	2	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The RoFTA indicator was available for all 7 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the RoFTA values for 2023 indicate:

- 4 (57%) segment was **in balance** with fishing opportunities
- 3 (43%) segments were **out of balance** with fishing opportunities

Trends could be calculated for 6 segments:

- 5 (83%) segments displayed an **improving** trend,

- 1 (17%) segment displayed a **deteriorating** trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for all 7 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 2 (29%) segments were **in balance** with fishing opportunities,
- 5 (71%) segments were **out of balance** with fishing opportunities.

Trends could be calculated for 6 segments:

- 2 (33%) segments displayed an **improving** trend,
- 2 (33%) segments displayed a **deteriorating** trend,
- 2 (34%) segments displayed **no clear** trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were not provided by the MS and thus, VUR₂₂₀ is analysed here.

The VUR₂₂₀ indicator was available for all 14 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the VUR₂₂₀ values for 2023 indicate:

- 2 (14%) segments were in balance with fishing opportunities,
- 12 (86%) segments were out of balance with fishing opportunities.

Trends could be calculated for 10 segments:

- 8 (80%) segments displayed no clear trend,
- 2 (20%) segments displayed an improving trend.

Area OFR

There were 2 fleet segments in 2023, which were active. The weight of landings was provided by 2 vessels. No economic data was provided.

Stocks at Risk Indicator (SAR)

The two Polish vessels operating in OFR were **in balance** with fishing opportunities.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were not provided by the MS and thus, VUR₂₂₀ is analysed here. The segment was **in balance** with fishing opportunities. However, this segment contains only 2 vessels in 2023.

Synthesis of indicators and trends

According to the criteria in the 2014 Commission guidelines, the EWG notes that in 2023 7 of 9 clustered segments are indicated to be imbalanced. Based on the indicator values for 2023

and the trends observed over 2019–2023, and in line with the criteria set out in the Commission guidelines, more than half of the fleet segments are indicated to be out of balance with fishing opportunities. Half of the segments are indicated to be out of balance according to the RoFTA values, while 71 percent are indicated to be out of balance according to the CR/BER values. Trends in CR/BER are mostly unclear or deteriorating, while RoFTA trends are improving for five of the six fleet segments.

The status of each indicator as computed by EWG with respect to the criteria given in the Commission Guidelines (COM (214)545) is illustrated in Table 4.4.17.1.

Table 4.4.17.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance

out of balance

insufficiently profitable

bordeline

insufficient data

		Status 2023							Status 2023				
Fleet segment/ clustered segment	Nb of vessels	Economic					Fleet segment	Nb of vessels	Biological			Technical	
		CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE			SAR	SHI	EDI	VUR	
POL NAO DFN1218 *	26						POL NAO DFN1218	17	1				
							POL NAO DFN1824	5					
							POL NAO HOK1218	4					
POL NAO DTS1218 *	27						POL NAO DTS1218	14	3				
							POL NAO DTS1824	5					
							POL NAO DTS2440	1					
							POL NAO DTS0812	7					
							POL NAO FPO1824	2					
POL NAO FPO1824	2												
POL NAO PG0008	328								2				
POL NAO PG0812	308								3				
POL NAO TM1218	14								1				
POL NAO TM1824	41								1				
POL NAO TM2440	42								1				
POL OFRTM40XX	2						POL OFRTM40XX	2					
Total active	790												
Total inactive	35												
% of inactive in total	4.2												

improving

deteriorating

no clear trend

null/flat trend

insufficient data

		Trends 2019-2023							Trends 2019-2023		
Fleet segment/ clustered segment	Nb of vessels	Economic					Fleet segment	Nb of vessels	Biological		Technical
		CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE			SHI	EDI	VUR
POL NAO DFN1218 *	26						POL NAO DFN1218	17			
							POL NAO DFN1824	5			
							POL NAO HOK1218	4			
POL NAO DTS1218 *	27						POL NAO DTS1218	14			
							POL NAO DTS1824	5			
							POL NAO DTS2440	1			
							POL NAO DTS0812	7			
POL NAO FPO1824	2										
POL NAO PG0008	328										
POL NAO PG0812	308										
POL NAO TM1218	14										
POL NAO TM1824	41										
POL NAO TM2440	42										
POL OFRTM40XX	2						POL OFRTM40XX	2			

*Note1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is indicated in the table with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster.*

Note2: Vessel Utilization indicators (VUR) were not computed by the EWG although they were provided in the National Fleet Report (see explanation below in section “Comparison of indicator values; The vessel utilization indicator”).

Note3: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: Own elaborations.

Comparison of indicator values

A comparison Indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the Fleet Report submitted by Poland SHI is presented for the period 2022–2024, therefore the trends cannot be compared.

SHI values reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 are similar for 3 fleet segments (i.e., all the 3 fleet segments indicate as out of balance), while for TM VL1218 the annual report indicates a SHI value of 0.93 (in balance) while EWG 25-12 calculated a value of 1.02 (out of balance).

Stocks at Risk Indicator (SAR)

In the Fleet Report submitted by Poland SAR is presented for 2022–2024, therefore the trends cannot be compared.

The comparison between SAR values reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 was made for 2023 and reveals some discrepancies. In particular, DFN VL1218 and PG VL0008 were out of balance for EWG 25-12, while the fleet report indicates that these fleet segments are in balance for SAR.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed similar outputs. There were some differences in indicator values for some fleet segments, their status with respect to being in or out of balance was the same for most segments. However, DTS VL1218 and TM VL1218 segments in fleet report were indicated as in balance, while the EWG 25-12 calculation indicates out of balance.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the MS annual fleet report ROI was calculated where RoFTA was estimated by EWG 25-12.

The status in terms of balance for both indicators revealed similar outputs for 7 segments:

- 4 segments were in balance with fishing opportunities,
- 3 segments were out of balance with fishing opportunities.

In the absence of RoFTA calculations in the MS report, a comparison between trends is not possible. No comparison with trends estimated by the EWG 25-12 could be undertaken.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The maximum number of days at sea is still requested at the fleet segment level by supra region was not submitted by MS in data call. Comparison VUR indicator analysis could not be undertaken as values were not estimated by the EWG 25-12.

The Inactive Fleet Indicators

A description of fleet activity based on the data submitted in response to the 2025 fleet economic data call, are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted in 2025 provides indicator values separately by fleet segment based on DCF information and for the majority of the indicators specified in the Commission guidelines (COM (2014) 545).

Fleet segments that are assessed by the Member State to be “out of balance” with fishing opportunities are clearly identified in the fleet report.

An action plan for fleet segments assessed by the Member State to “out of balance” is included in the fleet report.

The Fleet Report submitted by Poland states that there is imbalance between the fishing capacity of the Polish fleet operating in the Baltic and available fish stocks. In particular, it attributes the main causes of the imbalances to the following main factors: a) an excessive number of vessels in the fleet; b) catch imbalance; c) an imbalance in the exploitation of central Baltic herring; d) banning of cod-targeting fisheries.

The Fleet Report provides information about several management measures carried out by Poland to reduce the number of imbalanced fleets segments.

The EWG notes that no cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance.

Discrepancies in previous fleet reports

Most of the discrepancies for SHI and SAR which were found by EWG 25-12 have been addressed in the fleet report 2025.

The CR/BER calculation for 3 vessel segments (DFN VL1218, PG VL0008 and PG VL0812) indicated in balance in segments when the EWG 25-12 was observed imbalance.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The fleet report submitted by 31 May 2025 identifies overcapacity for 7 segments.

The MS has indicated when structural overcapacity exists in the fleet and long-term profitability is identified by fleet segment based on the values for ROI. The MS outlined its concerns regarding the stocks' situation in the Baltic Sea and the potential implications for all fleet segments operating in the area.

Overview of action plans.

In the most recent fleet report, Poland identified structural overcapacity in seven fishing fleet segments, compared to eight segments reported in 2023. The DTS VL1218 segment is no longer part of the active fleet (since 2022). Consequently, Poland has submitted a partly revised action plan, which builds upon the framework established in the 2022 plan but reflects updated assessments of economic and biological indicators for the period 2023–2025.

The revised action plan maintains the general structure and objectives of the previous one but provides segment-specific actions for addressing imbalances. It continues to focus on achieving a lasting balance between fishing capacity and available fishing opportunities, in line with Article 22(1) of Regulation (EU) No 1380/2013.

The plan defines three main areas of intervention:

1. Adjustment of fleet capacity — progressive reduction in the number of vessels in segments identified as permanently inefficient or economically imbalanced, to improve overall efficiency and restore financial stability.
2. Optimisation of fishing rights — development of a quota allocation system (TAC distribution) designed to promote biological sustainability and ensure that fishing activities remain within ecologically viable limits.
3. Enhancement of data collection and modelling — improvement of data collection tools and analytical models for economic and biological performance, with the aim of establishing more accurate balance assessments and long-term fleet management strategies.

The timeframe for implementation remains unchanged, covering the 2023–2027 period, during which Poland intends to achieve both economic and biological balance within its Baltic Sea fleet.

While the plan outlines clear quantitative targets and methodological tools, EWG 25-12 notes that no specific implementation dates have been provided beyond the general 3–5-year period.

According to the Polish Action Plan, the permanent withdrawal of vessels from the three fleet segments (VL1218TM, VL1824TM, and VL2440TM) was not envisaged. However, the report indicates that six vessels from the VL1218TM segment, six vessels from the VL1824TM segment, and one vessel from the VL2440TM segment was permanently withdrawn.

Adjustment targets and tools

The revised action plan was submitted with the fleet report by 31 May 2025. The updated numbers of vessels, which are foreseen for permanent cessation, was provided in the report. The targets and tools defined clearly and remain as in 2024 report.

The EWG has identified the need to revise the action plan for segments VL1218TM, VL1824TM, and VL2440TM to accurately reflect the status of permanently withdrawn vessels. It was observed that certain vessels within these segments were scrapped without this action being properly recorded in the plan.

Number of vessels

All 788 vessels are targeted by action plan whereas 260 vessels are foreseen for permanent cessation.

4.4.18 Portugal (PRT)

Overview of indicator findings

There were 75 fleet segments in the Portuguese fleet in 2023, of which 59 were active. Of the 59 active segments, landings data were provided for 54 fleet segments and economic data were available for 54 aggregated fleet segments. Results are presented by supra-region below.

4.4.18.1 Area 27

There were 43 fleet segments operating in Area 27 in 2023, of which 37 were active. Of the 37 active segments, landings data were provided aggregated for 34 fleet segments and economic data were available for 34 aggregated fleet segments

Sustainable harvest indicator (SHI)

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 21 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The SHI indicator was available for 10 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 10 (100%) segments were *in balance* with fishing opportunities

Trends could be calculated for 9 segments:

- 1 fleet segment displayed a *deteriorating* trend,
- 2 fleet segments displayed an *improving* trend,
- 6 fleet segments displayed *no clear* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 34 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 25 (74%) segments were *in balance* with fishing opportunities
- 9 (26%) segments were *out of balance* with fishing opportunities:
 - 2 fleet segments with 6 stocks-at-risk,
 - 1 fleet segment with 4 stocks-at-risk,
 - 2 fleet segments with 2 stocks-at-risk,
 - 4 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%

N of fleet segments	17	14		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	27	4		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

ROI was not calculated.

The RoFTA indicator was available for 34 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that values indicate:

- 24 (71%) segments were *in balance* with fishing opportunities
- 9 (26%) segments were *out of balance* with fishing opportunities
- 1 (3%) segment was *insufficiently profitable* with fishing opportunities

Trends could be calculated for 33 segments:

- 14 segments displayed an *improving* trend,
- 19 segments displayed a *deteriorating* trend,

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 34 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 23 (68%) segments were *in balance* with fishing opportunities
- 11 (32%) segments were *out of balance* with fishing opportunities

Trends could be calculated for 33 segments:

- 12 segments displayed an *improving* trend,
- 18 segments displayed a *deteriorating* trend,
- 3 segments displayed *no clear* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

The VUR indicator was available for 37 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 23 (62%) segments were *in balance* with fishing opportunities
- 14 (38%) segments were *out of balance* with fishing opportunities

Trends could be calculated for 35 segments:

- 1 segment displayed an *improving* trend,
- 34 segments displayed *no clear* trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends (Area 27)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.18.1.

Table 4.4.18.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Status							Status 2023			
		in balance out of balance borderline insufficiently profitable insufficient data							in balance out of balance borderline insufficiently profitable insufficient data			
Fleet segment/ clustered segment	Nb of vessels	Status 2023 Economic					Fleet segment	Nb of vessels	Status 2023			
		CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE			Biological			Technical
									SAR	SHI	EDI	VUR
PRT NAO DTS40XX IWE	7						PRT NAO DTS40XX IWE	7	6			
PRT NAO DFN0010 NGI	220						PRT NAO DFN0010 NGI	220	1			
PRT NAO DFN1012 NGI	18						PRT NAO DFN1012 NGI	18				
PRT NAO DFN1218 NGI	39						PRT NAO DFN1218 NGI	39	2			
PRT NAO DFN1824 NGI	22						PRT NAO DFN1824 NGI	22				
PRT NAO DRB0010 NGI	32						PRT NAO DRB0010 NGI	32				
PRT NAO DRB1012 NGI	20						PRT NAO DRB1012 NGI	20				
PRT NAO DRB1218 NGI	18						PRT NAO DRB1218 NGI	18				
PRT NAO DTS0010 NGI	3						PRT NAO DTS0010 NGI	3				
PRT NAO DTS1012 NGI	6						PRT NAO DTS1012 NGI	6				
PRT NAO DTS1218 NGI	9						PRT NAO DTS1218 NGI	9				
PRT NAO DTS1824 NGI	8						PRT NAO DTS1824 NGI	8	1			
PRT NAO DTS2440 NGI	55						PRT NAO DTS2440 NGI	55	4			
PRT NAO FPO0010 NGI	319						PRT NAO FPO0010 NGI	319				
PRT NAO FPO1012 NGI	46						PRT NAO FPO1012 NGI	46				
PRT NAO FPO1218 NGI *	54						PRT NAO FPO1218 NGI *	50	1			
PRT NAO HOK0010 NGI	105						PRT NAO HOK0010 NGI	105				
PRT NAO HOK1218 NGI *	28						PRT NAO HOK1012 NGI *	2				
PRT NAO HOK1824 NGI	22						PRT NAO HOK1218 NGI *	26				
PRT NAO HOK2440 NGI	15						PRT NAO HOK1824 NGI	22				
PRT NAO MGO0010 NGI	23						PRT NAO HOK2440 NGI	15	1			
PRT NAO MGO1012 NGI	6						PRT NAO MGO0010 NGI	23				
PRT NAO PGP0010 NGI	1488						PRT NAO MGO1012 NGI	6				
PRT NAO PGP1012 NGI	10						PRT NAO PGP0010 NGI	1488	5			
PRT NAO PGP1218 NGI	24						PRT NAO PGP1012 NGI	10				
PRT NAO PGP1824 NGI	3						PRT NAO PGP1218 NGI	24				
PRT NAO PMP0010 NGI	31						PRT NAO PGP1824 NGI	3				
PRT NAO PS 0010 NGI	20						PRT NAO PMP0010 NGI	31	1			
PRT NAO PS 1012 NGI	23						PRT NAO PS 0010 NGI	20				
PRT NAO PS 1218 NGI	32						PRT NAO PS 1012 NGI	23				
PRT NAO PS 1824 NGI	50						PRT NAO PS 1218 NGI	32				
PRT NAO PS 2440 NGI	21						PRT NAO PS 1824 NGI	50				
PRT NAO TBB0010 NGI	10						PRT NAO PS 2440 NGI	21				
PRT NAO TBB1012 NGI *	10						PRT NAO TBB0010 NGI	10				
							PRT NAO TBB1012 NGI *	9				
							PRT NAO TBB1218 NGI *	1				
Total active vessels	2797											
Total inactive vessels	2974											
% of inactive in total	52%											

Trend	
■	improving
■	deteriorating
■	null/flat trend
■	no clear trend
■	insufficient data
■	no data

Fleet segment/ clustered segment		Nb of vessels		Trends 2019-2023						Fleet segment		Nb of vessels		Trends 2019-2023		
				Economic										Biological		Technical
				CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	SHI					EDI	VUR	
PRT NAO DTS40XX IWE	7						PRT NAO DTS40XX IWE	7								
PRT NAO DFN0010 NGI	220						PRT NAO DFN0010 NGI	220								
PRT NAO DFN1012 NGI	18						PRT NAO DFN1012 NGI	18								
PRT NAO DFN1218 NGI	39						PRT NAO DFN1218 NGI	39								
PRT NAO DFN1824 NGI	22						PRT NAO DFN1824 NGI	22								
PRT NAO DRB0010 NGI	32						PRT NAO DRB0010 NGI	32								
PRT NAO DRB1012 NGI	20						PRT NAO DRB1012 NGI	20								
PRT NAO DRB1218 NGI	18						PRT NAO DRB1218 NGI	18								
PRT NAO DTS0010 NGI	3						PRT NAO DTS0010 NGI	3								
PRT NAO DTS1012 NGI	6						PRT NAO DTS1012 NGI	6								
PRT NAO DTS1218 NGI	9						PRT NAO DTS1218 NGI	9								
PRT NAO DTS1824 NGI	8						PRT NAO DTS1824 NGI	8								
PRT NAO DTS2440 NGI	55						PRT NAO DTS2440 NGI	55								
PRT NAO FPO0010 NGI	319						PRT NAO FPO0010 NGI	319								
PRT NAO FPO1012 NGI	46						PRT NAO FPO1012 NGI	46								
PRT NAO FPO1218 NGI *	54						PRT NAO FPO1218 NGI *	50								
							PRT NAO FPO1824 NGI *	4								
PRT NAO HOK0010 NGI	105						PRT NAO HOK0010 NGI	105								
PRT NAO HOK1218 NGI *	28						PRT NAO HOK1012 NGI *	2								
							PRT NAO HOK1218 NGI *	26								
PRT NAO HOK1824 NGI	22						PRT NAO HOK1824 NGI	22								
PRT NAO HOK2440 NGI	15						PRT NAO HOK2440 NGI	15								
PRT NAO MGO0010 NGI	23						PRT NAO MGO0010 NGI	23								
PRT NAO MGO1012 NGI	6						PRT NAO MGO1012 NGI	6								
PRT NAO PGP0010 NGI	1488						PRT NAO PGP0010 NGI	1488								
PRT NAO PGP1012 NGI	10						PRT NAO PGP1012 NGI	10								
PRT NAO PGP1218 NGI	24						PRT NAO PGP1218 NGI	24								
PRT NAO PGP1824 NGI	3						PRT NAO PGP1824 NGI	3								
PRT NAO PMP0010 NGI	31						PRT NAO PMP0010 NGI	31								
PRT NAO PS 0010 NGI	20						PRT NAO PS 0010 NGI	20								
PRT NAO PS 1012 NGI	23						PRT NAO PS 1012 NGI	23								
PRT NAO PS 1218 NGI	32						PRT NAO PS 1218 NGI	32								
PRT NAO PS 1824 NGI	50						PRT NAO PS 1824 NGI	50								
PRT NAO PS 2440 NGI	21						PRT NAO PS 2440 NGI	21								
PRT NAO TBB0010 NGI	10						PRT NAO TBB0010 NGI	10								
PRT NAO TBB1012 NGI *	10						PRT NAO TBB1012 NGI *	9								
							PRT NAO TBB1218 NGI *	1								

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stock at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report)

Source: own elaborations.

4.4.18.2 MBS

There is 1 fleet segment operating in area 37 in 2023, made up of a single vessel. For confidentiality reasons, this segment cannot be analysed.

Synthesis of indicators and trends (Area 37)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.18.2.

Table 4.4.18.2. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

Status

in balance

out of balance

borderline

insufficiently profitable

insufficient data

		Status 2023							Status 2023			
		Economic							Biological			Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR
PRT MBS FPO2440 NGI	1						PRT MBS FPO2440 NGI	1				
Total active vessels	1											
Total inactive vessels	0											
% of inactive in total	0%											

Trend

improving

deteriorating

null/flat trend

no clear trend

insufficient data

no data

Note 1: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stock at risk.

Source: own elaborations.

4.4.18.3 OFR

There were 3 fleet segments operating in OFR in 2023, which was active. Landings data and economic data were provided for all the fleet segments.

Sustainable harvest indicator (SHI)

The SHI indicator was available for 2 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the SAR values for 2023 indicate:

- 2 (100%) segments were *out of balance* with fishing opportunities
- 0 (0%) segments were *in balance* with fishing opportunities

Trends could not be calculated.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 3 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the SAR values for 2023 indicate:

- 2 (67%) segments were *in balance* with fishing opportunities
- 1 (33%) segment was *out of balance* with fishing opportunities:
1 fleet segment with 3 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1	1		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments		2		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for 3 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the RoFTA values for 2023 indicate:

- 3 (100%) segments were *out of balance* with fishing opportunities

Trends could not be calculated.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 3 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the CR/BER values for 2023 indicate:

- 3 (100%) segments were *out of balance* with fishing opportunities

Trends could not be calculated.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The VUR indicator was available for 3 fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the VUR values for 2023 indicate:

- 3 (100%) segments were *in balance* with fishing opportunities

Trends couldn't be calculated.

The Inactive Fleet Indicators

No inactive vessels in the OFR fleet segments were recorded. Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends (OFR)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.18.3.

Table 4.4.18.3. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

Status

in balance

out of balance

borderline

insufficiently profitable

insufficient data

		Status 2023							Status 2023			
		Economic							Biological			Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR
PRT OFR DTS40XX IWE	1						PRT OFR DTS40XX IWE	1				
PRT OFR HOK2440 IWE	12						PRT OFR HOK2440 IWE	12	3			
PRT OFR HOK40XX IWE	3						PRT OFR HOK40XX IWE	3				
Total active vessels	16											
Total inactive vessels	0											
% of inactive in total	0%											

Trend

improving

deteriorating

null/flat trend

no clear trend

insufficient data

no data

		Trends 2019-2023							Trends 2019-2023		
		Economic							Biological		Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SHI	EDI	VUR
PRT OFR DTS40XX IWE	1						PRT OFR DTS40XX IWE	1			
PRT OFR HOK2440 IWE	12						PRT OFR HOK2440 IWE	12			
PRT OFR HOK40XX IWE	3						PRT OFR HOK40XX IWE	3			

Note 1: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stock at risk.

Source: own elaborations.

Status and trends for the Portugal fleet in ALL REGIONS

For the Portuguese NAO area fishery, based on indicator values for 2023 and trends over 2018-2023 and according to the criteria in the Commission guidelines. Based on the STECF indicator estimated for the economic indicators, most fleet segments in the Portuguese NAO

area fishery are indicated to be in balance. Considering biological indicators, the SHI was calculated for 10 fleet segments, representing 46% of the total landings. These fleet segments were indicated to be in balance according to the SHI. Most fleet segments were indicated to be in balance according to the SAR indicator values.

An analysis of the indicators for the Portuguese OFR area fishery revealed that all OFR fleet segments were indicated to be out of balance with respect to the available economic indicators (CR/BER and RoFTA). For the biological indicator SAR, one segment (OFR HOK VL2440) is indicated to be out of balance, while SHI value indicates in balance. The technical indicator VUR indicates that all three segments were in balance. Since no trends were available, the EWG 25-12 observations only apply to the 2023 values.

Portugal also has a fleet segment in the Mediterranean. This segment consists of only one vessel. Biological, economic and technical indicator values indicate that this fleet segment is in balance.

Comparison of indicators

A comparison of indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the Portuguese annual fleet report, SHI-values have been presented for the DFN, DTS, HOK, MGO and PS mainland segments, for 2022 and 2023.

Although there are discrepancies in the SHI values for the segments that could be compared, these differences have no effect on the indication of balance/imbalance.

There is no trend over the last few years calculated in the fleet report.

Stocks at Risk Indicator (SAR)

In the MS report there were no stocks identified as a stock at risk.

According to the EWG 25-12 values for the SAR indicator, 9 mainland fleet segments and 1 OFR fleet segments were indicated to be out of balance OFR HOK VL2440-IWE and NAO DTS VL40XX-IWE (DTS VL2440-NGI, PGP VL0010-NGI, DFN VL0010-NGI, DFN VL1218-NGI, DTS1824-NGI, HOK2440-NGI, FPO1218-NGI and PS1012-NGI).

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the Portuguese fleet report, the CR/BER-values have been provided for the reference years 2020-2023 accompanied by projected CR/BER values for 2024 for 38 segments based on the trends over the period 2019-2023. Values for 38 segments were also computed by the EWG 25-12.

A comparison between indicator values in the MS Fleet report and those estimated by EWG 25-12 showed some discrepancies in values, but the differences only affect the indications of balance/imbalance for three fleet segments (NAO DRB VL0010, NAO DTS VL1824 and OFR HOK VL40XX). However, no comparison between the trends presented in the MS fleet Report

(based on data from 2019 to 2023) and those estimated by the EWG 25-12 was undertaken, as they are based on different approaches to the interpretation of the time series of data.

Trends based on EWG 25-12 values for 34 segments in Area 27 (no trends available for the OFR fleet) were as follows:

- 13 segments displayed an improving trend (DFN VL1012, DFN VL1218, DTS VL0010, DTS VL1218, FPO VL0010, FPO VL1012, FPO VL1218, PGP VL0010, PGP VL1218, PGP VL1824, PS VL1218 and PS VL2440),
- 18 segments displayed a deteriorating trend (DTS VL40XX, DFN VL0010, DRB VL0010, DRB VL1012, DRB VL1218, DTS VL1012, DTS VL1824, DTS VL2440, HOK VL0010, HOK VL1824, MGO VL0010, MGO VL1012, PMP VL0010, PS VL0010, PS VL1012, PS VL1824, TBB VL0010 and TBB VL1012),
- 3 segments displayed no clear trend (DFN VL1824, HOK VL2440 and PGP VL1012).

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the Portuguese fleet report, the RoFTA values have been provided for the reference years 2020-2023 accompanied by projected CR/BER values for 2024 for 38 segments based on the trends over the period 2019-2023. Values for 38 segments were also computed by the EWG 25-12.

A comparison between indicator values in the MS Fleet report with those computed by EWG 25-12 showed important differences in values in all segments: there is a scaling-factor difference of 100 between the values calculated by the MS and those of the EWG 25-12 (the values are in percentages in the Member State's fleet report). To compare the values, the EWG values have to be divided by 100. In addition to the scaling issue, there are some differences in the RoFTA values. However, the indications of balance / imbalance for all but three fleet segments are the same: DRB VL0010 ("insufficiently profitable" according to the EWG and "in balance" according to the MS report), PGP VL1012 ("out of balance" according to the EWG and no status is given in to the MS report) and HOK VL 40XX ("out of balance" according to the EWG and "in balance" according to the MS report).

However, no comparison between the trends presented in the MS fleet Report (based on data from 2019 to 2023) and those estimated by the EWG 25-12 was undertaken, as they are based on different approaches to the interpretation of the time series of data.

Trends based on EWG 25-12 calculations for 34 segments in Area 27 (no trends available for the OFR fleet) were as follows:

- 15 segments displayed an improving trend (DFN VL1012, DFN VL1218, DFN VL1824, DTS VL0010, DTS VL1218, FPO VL0010, FPO VL1012, FPO VL1218, HOK VL2440, PGP VL0010, PGP VL1218, PGP VL1824, PS VL1218 and PS VL2440),
- 19 segments displayed a deteriorating trend (DTS VL40XX, DFN VL0010, DRB VL0010, DRB VL1012, DRB VL1218, DTS VL1012, DTS VL1824, DTS VL2440, HOK VL0010, HOK VL1824, MGO VL0010, MGO VL1012, PGP VL1012, PMP VL0010, PS VL0010, PS VL1012, PS VL1824, TBB VL0010 and TBB VL1012).

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the Portuguese annual fleet report the VUR values have been provided for total of 38 fleet segments (34 segments in NAO, 1 MBS and 3 OFR). The VUR was based on maximum observed days at sea in each fleet segment. Hence VUR220 is not considered here.

There were differences in VUR values for nearly all segments that could be compared between the EWG 25-12 and the MS Fleet Report. The outcome in terms of whether the fleet segments concerned are indicated to be in or out of balance were also different for 11 fleet segments. The difference are likely to have arisen because the maximum days at sea (maxseadays) used to compute VUR in the MS fleet report were different to those provided to the EWG.

According to the trends estimated by EWG 25-12, all fleet segments showed no clear trend, except for NAO DTS VL0010 with an improving trend. Since projections rather than trends were included in the MS Fleet report, no comparison of trends was feasible.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The EWG 25-12 notes the following:

The fleet report submitted in 2025 provides indicator values separately by fleet segment based on DCF information and for the majority of the indicators specified in the Commission guidelines (COM (2014) 545).

Fleet segments that are assessed by the Member State to be "out of balance" with fishing opportunities are clearly identified in the fleet report. An action plan for fleet segments assessed by the Member State to be "out of balance" was included in the previous fleet report and has been undergoing progressive implementation since 2002. The Member State commented that it is not yet possible to draw any conclusions the outcomes of the implemented measures on the segments concerned.

The MS fleet report indicates that for the Portuguese fleet in all regions (including the OMR), the proportion of inactive vessels in 2024 remains high (51%). A process of decommissioning vessels that have been inactive for a long period of time is ongoing and for 2023, 704 vessels with corresponding capacity of 996 GT and 4 993 kW were withdrawn.

The VUR values in the fleet report indicate imbalance for most fleet segments, but the MS fleet considers that because of factors such as, weather and sea conditions, the part time nature of many vessels and management measures such as closed areas and seasons, the VUR indicator does not appear to be the most appropriate means of assessing the actual activity of the vessels. In the fleet report, only biological indicator values for the main species fished by Portugal and which are assessed by ICES were calculated. Consequently, SHI-values were given for the DFN, DTS, HOK, MGO and PS Mainland segments only. The resulting SHI values indicated that the segments were in balance with fishing opportunities.

According to the economic indicators presented in the MS fleet report, most fleet segments (93.6% of all active vessels) performed well in 2023. Of the 38 mainland fleet segments, 25 NAO segments, 1 MBL segment and 1 OFR segment are indicated to be in balance and 9 NAO segments and 2 OFR segments indicated to be out of balance.

Based on the combined analysis of the results of vessel use, biological sustainability and economic indicators, the MS concludes in the Fleet Report that the majority of the Portuguese fleet is more or less in balance with fishing opportunities. Only the HOK VL1824 and HOK VL2440 targeting swordfish are considered imbalanced and an action plan has been provided for these vessels since 2022.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information.

Discrepancies in previous fleet reports

The EWG notes that the issues pointed out by the EWG 24-13 regarding computation of the SAR indicator have been addressed to some extent in the fleet report. The SAR indicator values for mainland fleets (NAO, MBS and OFR) are now based on stocks considered to be at high biological risk, and which account for more than 10% of the fleet's catch, rather than just being based on catches of undulate ray and eel as in the previous report. Nevertheless, the values for SAR are still different to those estimated by EWG 15-12.

While the MS's values for all indicators differ from those calculated by the EWG 15-12, the indications for whether segments are in/out of balance may be unaffected. This is particularly true with respect to economic indicators which indicate the majority of segments to be in balance.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The economic indicator values for the fleet segments relate to the year 2023. Most fleet segments performed well and were indicated to be in balance.

However, for vessels over 18 meters operating with hooks (HOK) in mainland and external waters, the estimated economic indicators suggest that these fleet segments may be showing signs of potential imbalance, as they have not generated sufficient revenue to cover operating and capital costs.

In addition, the EWG 25-12 estimates by segment indicate both short and long-term unprofitability, with a deteriorating trend for CR/BER and RoFTA, but a high level of utilization according to the VUR for six NAO segments (DTS VL40XX, DTS VL2440, MGO VL1012, PGP VL1012, TBB VL0010, and TBB VL1012). Two segments (DRB VL0010 and PMP VL0010) showed low economic performance in 2023, with a deteriorating trend for both CR/BER and RoFTA, and substantial under-utilization according to the VUR, which may indicate technical overcapacity in line with the Guidelines.

Overview of action plans

The action plan presented is a continuation of the Action Plan set out in the 2021 and 2022 reports on the Portuguese fishing fleet, which aims for an adjustment (reduction in capacity) of the fishing fleet operating with hooks, particularly in the case of larger length-class vessels.

The action plan foresees the permanent cessation of activity through scrapping vessels or decommissioning and retrofitting for activities other than commercial fishing. The focus will be on older vessels, as these are generally the least energy-efficient, both in terms of their engines and hydrodynamics.

In addition, a temporary cessation measure regarding the licensed fleet with a quota to fish swordfish (northern stock) is also to be implemented in 2023, according to the action plan.

It is difficult for the EWG 25-12 to assess the extent to which the measures outlined in the action plan are likely to address the identified imbalance in the relevant fleet segments.

Adjustment targets and tools

The action plan seems to infer to vessels of the fleet segments HOK above 12 meters targeting swordfish and provide clear adjustment targets and tools.

In the action plan, a need for adjusting the fleet's capacity is considered. The aim of implementing measures for the permanent cessation of activity is presented and a timetable defining the start of the implementation in the second half of 2023 and the completion of decommissioning by the end 2025 are defined. The plan targets the HOK segment over 12 meters and more particularly 9 vessels using bottom and/or deep-water longlines and 7 surface longliners targeting swordfish. The application period ran from 1 September to 31 October 2023. Under this plan, 18 vessels, distributed across the length classes VL1218 (14 vessels), VL1824 (3 vessels), and VL2440 (1 vessel), permanently ceased fishing activities in 2024. Of these, one vessel was decommissioned and retrofitted for an activity other than commercial fishing, while the remaining vessels were scrapped. Considering the timeline for the AP's implementation, the planned capacity reduction is anticipated to be achieved by the end of 2025.

The action plan also foresees the implementation of a temporary cessation measure, which will halt vessel activity for a period of 45 days, starting in June and ending in September 2024. The plan relates to around 40 vessels which have a quota to fish swordfish (northern stock). In 2024, the Order No. 17/DG/2024 prohibited swordfish fishing for 45-60 days (minimum 45 and maximum 60) affecting 25 vessels with corresponding fishing capacity of 4 318.83 GT and 8 930.26 kW. The activity interruption could be scheduled as one or two distinct periods between 15 June and 31 October; however, a continuous 45-day prohibition of fishing operations within the period 15 June to 15 September was obligatory under both options.

Number of vessels

The action plan submitted by the MS concerns a total of 54 vessels:

- permanent cessation: 26 vessels
- temporary cessation: 28 vessels complied with these requirements.

The fleet capacity will be adjusted by 26 vessels, which will result in a capacity reduction of around 1 615 GT in terms of gross tonnage and 5 336 kW in terms of engine power.

4.4.19 Romania (ROU)

Overview of indicator findings

Area 37

There were 10 fleet segments in 2023, of which 7 were active. Biological and technical indicators were estimated for these 7 segments. For the economic indicators the 7 fleet segments were clustered into 5 fleet clusters for which economic data was provided for 3 fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2023, landings in value have been provided aggregated in 7 fleet segments and SHI indicator values were available for 7.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 2 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that the 5 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 94.06% of the total value of the landings in 2023 provided by MS. The SHI indicator was available for 5 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 fleet segments were *in balance* with fishing opportunities
- 3 fleet segments were *out of balance* with fishing opportunities

Trends were calculated for 5 fleet segments:

- 5 segments indicate *improving* trends

Stocks at Risk Indicator (SAR)

SAR indicator was available for 7 active fleet segments in 2023.

In accordance with the Commission guidelines, the EWG notes that the SAR values for 2023 indicate:

- 7 fleet segments were *in balance* with fishing opportunities

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2	3		1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	4	1	2	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The ROI indicator was available for 3 clustered segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 segments were *in balance* with fishing opportunities
- 1 segment was *out of balance* with fishing opportunities

Trends were calculated for 2 segments:

- 1 segment indicated an *improving* trend
- 1 segment indicated a *deteriorating* trend

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 3 clustered segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 segments were *in balance* with fishing opportunities
- 1 segment was *out of balance* with fishing opportunities

Trends were calculated for 2 segments:

- 1 segment indicated an *improving* trend
- 1 segment indicated a *deteriorating* trend

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The VUR indicator was available for 7 segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 segments were *in balance* with fishing opportunities
- 4 segments were *out of balance* with fishing opportunities

Trends were calculated for 6 segments:

- 2 segments indicated an *improving* trend
- 4 segments indicated *no clear* trend

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on economic indicator values for 2023 and according to criteria in the Commission guidelines, the majority of the fleet are indicated to be in balance with fishing opportunities although the trends over 2019-2023 indicate a worsening situation.

Based on the biological indicator values, a number of fleet segments are indicated to be out of balance with fishing opportunities according to the SHI, but with trends showing an improving situation, while all segments are indicated to be in balance according to the SAR indicator.

Based on the technical indicators, the majority of fleet segments are indicated to be out of balance with fishing opportunities. VUR values indicate an imbalance in fishing opportunities for 4 of 7 segments. The MS (which indicates that 3 segments are out of balance according to the VUR indicator) notes that the affected segments are composed of a high number of vessels with low fishing effort.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.19.1.

Table 4.4.19.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance

insufficiently profitable

out of balance

borderline

insufficient data

			Economic Indicators							Biological and technical indicators			
			Status 2023							Status 2023			
SR	Clustered segment	No. of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fs_name	No. of vessels	SAR	SHI	EDI	VUR
MBS	ROU MBS PG 0006 NGI *	7						ROU MBS PG 0006 NGI *	7				
MBS	ROU MBS PG 0612 NGI *	109						ROU MBS PG 0612 NGI *	85				
MBS	ROU MBS PMP0006 NGI *	3						ROU MBS PMP 0612 NGI *	24				
MBS	ROU MBS PMP0006 NGI *	3						ROU MBS PMP 0006 NGI *	3				
MBS	ROU MBS PMP1218 NGI *	22						ROU MBS PMP 1218 NGI *	19				
MBS	ROU MBS PMP1218 NGI *	3						ROU MBS PMP 1824 NGI *	3				
MBS	ROU MBS PMP2440 NGI *	2						ROU MBS PMP 2440 NGI *	2				
Total Active		143											
Total Inactive		30											
% Inactivity		17%											

improving

null/flat trend

no trend

deteriorating

insufficient data

no data

			Economic Indicators							Biological and technical indicators			
			Trends 2019-2023							Trends 2019-2023			
SR	Clustered segment	No. of vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fs_name	No. of vessels	SHI	EDI	VUR	VUR ₂₂₀
MBS	ROU MBS PG 0006 NGI *	7						ROU MBS PG 0006 NGI *	7				
MBS	ROU MBS PG 0612 NGI *	109						ROU MBS PG 0612 NGI *	85				
MBS	ROU MBS PMP 0612 NGI *	24						ROU MBS PMP 0612 NGI *	24				
MBS	ROU MBS PMP0006 NGI *	3						ROU MBS PMP 0006 NGI *	3				
MBS	ROU MBS PMP1218 NGI *	22						ROU MBS PMP 1218 NGI *	19				
MBS	ROU MBS PMP1824 NGI *	3						ROU MBS PMP 1824 NGI *	3				
MBS	ROU MBS PMP2440 NGI *	2						ROU MBS PMP 2440 NGI *	2				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster. Source: own elaborations.

Note 2: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).

Source: own elaborations.

Comparison of indicators

A comparison of indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the MS annual fleet report all 7 segments are assessed to be imbalanced (PG 0-6m, PG 6-12m, PMP 0-6m, PMP 6-12m, PMP 12-18m, PMP 18-24m and PMP 24-40m). In the report a table was provided including SHI values for all 7 of these segments. In EWG 25-12 SHI was computed for 5 fleet segments of which only 2 segments had meaningful values.

Values for SHI were provided by fleet segment for the years 2016-2023 which show fluctuations throughout, however no assessment of trends is made in the fleet report.

Table 13 in the MS report shows that the SHI indicator values have been increasing over recent years which contrasts with the trend noted in values computed by the EWG 25-12 which indicate a downward trend in SHI values for 5 segments.

Stocks at Risk Indicator (SAR)

The values for SAR provided by fleet segment for the years 2016-2023 in the fleet report and those computed by the EWG indicate no stocks at risk in all years and for all segments.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the MS fleet report, the CR/BER ratio has been provided for 7 segments while EWG 25-12 has returned 7 segments grouped in 5 clusters. Indicator results are available for 3 of the five clusters in EWG 25-12. Two of these clusters do not have indicator results due to the lack of certain cost elements such as energy costs or capital costs. Because the fleet segments found by the EWG were clustered and the segments found by the MS were not, values for this indicator could only be compared for one segment, PMP2440 NGI *. This segment is indicated to be out of balance in both the MS annual report and in EWG 25-12.

The clusters PG0612 NGI * and PMP1218 NGI * in the EWG 25-12 data, are indicated to be in balance and their constituent segments listed in the fleet report (PG0612, PMP0612, PMP1218 and PMP1824) are also indicated as in balance. There is no contradiction between the fleet report and the EWG values.

EWG 25-12 did not calculate this indicator for PG0006 NGI * nor for PMP0006 NGI. The MS annual report indicates the former segment to be in balance while the latter segment is indicated to be out of balance.

Table 16 of the MS report shows indicator values from 2016-2023 which allows analysis of trends however no analysis of trends has been provided. Four segments display an increasing trend in this indicator value over time, while one segment shows a negative trend in CR/BER (worsening situation) while still indicated to be in balance. Two segments show a negative trend both of which were indicated to be out of balance.

EWG 25-12 shows trends for only 2 clusters, PG 0612 NGI* and PMP1218 NGI*, the former showing a positive trend (improving situation) while the latter showing a negative trend (worsening). The segments in the fleet report that constitute the PG 0612 NGI* cluster (PG 0612 and PMP 0612) both indicate an increasing trend, matching that shown by the EWG values. For cluster PMP 1218 NGI* the composite segments of PMP 1218 and PMP 1824 show different trends, one stable with fluctuations and the other more negative in the long term. There does not seem to be any inconsistency between the MS report and EWG 25-12.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the MS fleet report, the ROI has been provided for 7 segments while EWG 25-12 has returned 7 segments grouped in 5 clusters. In the MS fleet report, the RoI has been provided. Because the fleet segments found by the EWG were clustered and the segments found by the MS were not, values for this indicator could only be compared for one segment, PMP2440 NGI *. Both the MS annual report and in EWG 25-12 indicate the segment to be out of balance.

The clusters PG0612 NGI * and PMP1218 NGI * in the EWG 25-12 data, are indicated to be in balance and their constituent segments listed in the fleet report (PG0612, PMP0612, PMP1218 and PMP1824) are also indicated to be in balance.

EWG 25-12 does not calculate this indicator for the PG0006 NGI * or for PMP0006 NGI segments. The MS annual report indicates that segment PG0006 NGI * is in balance while PMP0006 NGI is not in balance. RoI is not computed by the EWG for these two segments.

Trends in RoI were provided in the annual report (Table 15) with 3 segments showing a negative trend (worsening situation) while 4 segments showed a positive trend (improving situation) compared to the 2016-2022 average. In EWG 25-12 trends are only shown for the two clusters PG0612 NGI * and PMP1218 NGI *, with the former showing a positive trend and the latter a negative trend. Comparing with the composite fleet segments, PG0612 and PMP0612 for the former and PMP1218 and PMP1824 for the latter, one segment is positive and the other three are negative. Overall, the trends seem to be in line between both sources. Trends were not analysed within the MS report.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the MS annual fleet report the VUR Indicator was calculated as the ratio between days at sea and maximum days at sea for each length group and gear type for the reference years 2016-2023. Major discrepancies have been observed in the calculation of VUR between the MS annual fleet report and the ones estimated by the EWG 25-12 for all segments. The MS annual report shows 3 segments below the 0.7 threshold for this indicator while the EWG 25-12 indicator values indicate four fleet segments to be out of balance and three in balance. The only difference between both is for segment PMP 0-6m, which is considered in balance in the MS report and out of balance according to the EWG 25-12 result.

The trends between the MS annual fleet report and EWG 25-12 for the period 2016-2023 aligned for most segments. The only inconsistency was for segment PG 0-6m which showed an improving (VUR is declining) trend in EWG 25-12 while the MS report showed a worsening (VUR is increasing) trend.

The Inactive Fleet Indicators

Inactive vessel data is provided by length class for the years 2016-2023. No clear trends are evident over time.

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted by Romania provides an analysis of balance between fleet capacity and fishing opportunity of all fleet segments for which indicator values were available.

For the economic indicators, the data provided to EWG 25-12 clustered 7 fleet segments into 5 clusters, whereas the data in the fleet report was available for all 7 fleet segments individually. Due to this discrepancy, the economic indicators could not be compared directly for the majority of segments but the results in the report were broadly in line with the estimates computed by EWG 25-12.

Only one fleet segment (PMP2440 NGI *) was assessed by the Member State to be out of balance with fishing opportunities and the proposed action plan does not specifically target this fleet segment.

For other fleet segments that according to one or more indicator values were indicated to be imbalanced, the Member State did not provide an overall assessment of balance for such fleet segments.

Discrepancies in previous fleet reports

In the fleet report submitted in 2023, the EWG 23-13 noted that comparisons could not be carried out for the economic indicators due to the use of clusters in EWG-23-13 compared to fleet segments in the annual report. The use of clusters in EWG 25-12 can be justified for PMP1218 NGI * given that one fleet segment only has 3 vessels however for PG0612 NGI * the smaller segment has 24 vessels. Usually, segments are clustered when small fleet segments, containing 5 or fewer vessels, are merged with other fleet segments for confidentiality purposes. It is unclear why a fleet segment with many vessels was clustered in this case. Landings data was provided for both fleet segments however economic data was only available for the cluster. In the fleet report the landings and economic data are provided as are the results for the economic indicators. It is unclear whether this is an issue with the MS data submission or with the data provided in EWG 25-12.

Additionally, economic indicator values for two segments could not be computed by the EWG one of which (diving for Rapa whelks) appears to be highly profitable and uses no fuel, although such indicators are given in the fleet report.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS fleet report identifies technical inefficiency in terms of VUR for 3 segments ascribing this under-use to an obsolete fishing fleet, the presence of sea mines and offshore sand extraction affecting fish species among other factors. Inactivity has been noted in the report to have fallen significantly over recent years and remaining stable in the most recent year. The report notes that in terms of biological indicators the effect of the Romanian fleet is insignificant due to their low level of regional landings of these stocks.

The fleet report also identifies the profitability of each fleet segment in the short and long-term and finds that PMP2440 is not profitable based on the CR/BER and the ROI. The other assessed fleet segments are found to be profitable (the PMP 0-6m segment shows negative results but 2023 is the only year of data for these).

Overview of action plans

The Action plan submitted by Romania does not appear to be based on analysis of the economic and technical indicators and seems to be an update and continuation of the Action plan from 2023. Despite one fleet segment appearing to be out of balance with fishing opportunities based on the economic indicators, no action plan specifically addressing economical imbalance in this segment is provided. A new law is currently coming into force which will revoke fishing licenses from vessels inactive for over one year. It is hoped that this measure will address any imbalances in fleet segments.

The current Action plan proposes economic and technical measures for the fisheries sector in general and does not indicate any measures specific to fleet segments found to be out of balance. These measures are broad-ranging, and their objectives and targets are unclear.

Adjustment targets and tools

The action plan is not targeted to specific out-of-balance fleets, so no adjustment targets and tools are set out.

The action plan submitted by the MS does not set out a timeframe for implementation.

Number of vessels.

The action plans provided by the MS does not identify the number of vessels targeted by the action plan.

4.4.20 Slovenia (SVN)

Overview of indicator findings

Area 37

There were 17 fleet segments in 2023, of which 13 were active. Of the active segments, landings and economic data were provided aggregated for 3 clusters (aggregated fleet segments). There were 136 vessels in the fleet of which only 73 were active.

The EWG notes that effort variables and landings should be provided by fleet segment instead of cluster segment so the EWP could calculate biological and technical indicators at the proper level of disaggregation

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2023, landings in value have been provided aggregated in 3 fleet segments and SHI indicator values were unavailable for all

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 3 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

Meaningful values for the SHI and its trends could not be calculated for any fleet segment.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 3 active fleet segments in 2023. In accordance with the criteria in the 2014 Balance Indicator Guidelines, EWG 25-12 notes that the values indicate:

- 3 fleet segments were *in balance* with fishing opportunities

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
No of fleet segments		2	1	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. The fleet segment reported is that for which F/FMSY is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
No of fleet segments	3			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 3 segments: In accordance with the criteria in the 2014 Balance Indicator Guidelines, EWG 25-12 notes that values indicate:

- All 3 segments were *in balance* with fishing opportunities.

Trends were calculated for 3 segments:

- 2 segments displayed an *improving* trend,
- 1 segment displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 3 segments: In accordance with the criteria in the 2014 Balance Indicator Guidelines, EWG 25-12 notes that the values indicate:

- All 3 segments were *in balance* with fishing opportunities.

Trends were calculated for 3 segments:

- 2 segments displayed an *improving* trend,

- 1 segment displayed a *deteriorating* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

VUR was calculated for 3 clustered fleet segments: In accordance with the criteria in the 2014 Balance Indicator Guidelines, EWG 25-12 notes that the values indicate:

- All 3 clustered segments were *out of balance* with fishing opportunities.

Trends were calculated for 10 individual segments

- 7 segments indicate *no trend*
- 3 segments indicate a *deteriorating* trend

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends from 2018 to 2023, according to the criteria in the Commission guidelines, EWG 25-12 found that most clustered fleet segments for which results are presented are indicated to be in balance with fishing opportunities for the economic indicators. Regarding biological indicators, according to the SAR indicator, all clustered segments are indicated to be in balance, but SHI indicator values could not be used meaningfully to assess the balance. VUR values indicate that all segments are out of balance.

Overall, EWG 25-12 could not properly evaluate the clustered segments and their capacity because some indicators are missing.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is shown in Table 4.4.20.1.

Table 4.4.20.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

Status	
	in balance
	out of balance
	bordeline
	insufficiently profitable
	insufficient data

		Status 2023								Status 2023			
		Economic								Biological		Technical	
Fleet segment/ clustered segment	No. vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment	No. vessels	SAR	SHI	EDI	VUR	
SVN MBS DFN0006 NGI *	22						SVN MBS DFN0006 NGI *	16					
							SVN MBS FPO0006 NGI *	2					
							SVN MBS HOK0006 NGI *	2					
							SVN MBS MGP0006 NGI *	1					
							SVN MBS PMP0006 NGI *	1					
SVN MBS DFN0612 NGI *	40						SVN MBS DFN0612 NGI *	25					
							SVN MBS DFN1218 NGI *	2					
							SVN MBS HOK0612 NGI *	8					
							SVN MBS HOK1218 NGI *	1					
							SVN MBS PMP0612 NGI *	3					
							SVN MBS PMP1218 NGI *	1					
SVN MBS DTS1218 NGI *	11						SVN MBS DTS0612NGI *	4					
						SVN MBS DTS1218 NGI *	7						
Total	136												
Inactive	63												
% Inactive	46.3												

Trend

improving

deteriorating

null/flat trend

insufficient data

no trend

no data

		Trends 2018-2023							Trends 2018-2023		
		Economic							Biological	Technical	
Fleet segment/ clustered segment	No. vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment	No. vessels	SHI	EDI	VUR
SVN MBS DFN0006 NGI *	22						SVN MBS DFN0006 NGI *	16			
							SVN MBS FPO0006 NGI *	2			
							SVN MBS HOK0006 NGI *	2			
							SVN MBS MGP0006 NGI *	1			
							SVN MBS PMP0006 NGI *	1			
SVN MBS DFN0612 NGI *	40						SVN MBS DFN0612 NGI *	25			
							SVN MBS DFN1218 NGI *	2			
							SVN MBS HOK0612 NGI *	8			
							SVN MBS HOK1218 NGI *	1			
							SVN MBS PMP0612 NGI *	3			
							SVN MBS PMP1218 NGI *	1			
SVN MBS DTS1218 NGI *	11						SVN MBS DTS0612NGI *	4			
							SVN MBS DTS1218 NGI *	7			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).

Source: own elaborations.

Comparison of indicator values

A comparison between Indicator values computed by the EWG 25-12 and those in the fleet report are given in Annex II. Points of note for each indicator are listed below. MS has

calculated technical indicators for 11 segments, but biological and economic indicators are only provided for DFN and DTS segments.

MS provided effort and landings variables aggregated by cluster instead of by fleet segment, so the EWG was unable to estimate biological and technical indicator at the proper level of disaggregation.

Sustainable harvest indicator (SHI)

Slovenia presented data for all DFN and DTS segments but none of them reached the 40% of their landings value comprised stocks for which estimates of F/F_{MSY} needed to consider them meaningful. Also, EWG 25-12 could not compute a meaningful value for the SHI for any fleet segment.

Stocks at Risk Indicator (SAR)

EWG 25-12 calculated SAR for 3 aggregated fleet segments. The MS annual fleet report provided SAR values for five fleet segments. EWG 25-12 outputs for SAR indicate that all 3 aggregated segments are in balance, while the MS report SAR outputs indicate 3 segments in balance and 2 fleet segments out of balance by 2 stocks at risk, *Squalus acanthias* and *Centrolophus niger*, being exploited by DFN0006 and DTS1218 respectively.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

MS presented this indicator for 5 fleet segments and the EWG 25-12 in 3 aggregated segments. The values of the indicators are different in the MS report and the EWG 25-12 but the indications with respect to balance/imbalance are the same and all 3 segments are indicated to be in balance fishing opportunities.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

MS presented this indicator for 5 fleet segments and the EWG 25-12 for 3 aggregated segments. The values of the indicators are the same between the two reports and the results indicate all 3 segments are in balance.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

MS reported VUR for 11 fleet segments, however EWG 25-12 could only estimate VUR for 3 aggregated fleet segments.

According to the EWG all the three aggregated segments are indicated to be out of balance, however in the MS report 6 fleet are indicated to be out of balance and 5 in balance.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The fleet report submitted by Slovenia provides an analysis of balance between fleet capacity and fishing opportunity of all significant fleet segments.

The fleet report submitted in 2025 provides indicator values separately by fleet segment, but MS only reports biological and economic indicators for the segments that are the most important in terms of landings, arguing that these indicators “would show a distorted picture on the balance” for the less-important segments. Technical indicator values are provided for 11 segments in the fleet report and 3 were computed by the EWG 25-12.

A difference between the EWG 25-12 and the MS was observed in the total number of vessels in the fleet.

The Member State continues to implement the existing national action plan and adopted a new multiannual plan for the management of fisheries exploiting small pelagic stocks. Although no action plan based on the results of the MS report is included in the fleet report since the Member State assessed all segments to be in balance.

The EWG notes that in cases where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information and analyses.

The current Slovenian management system is considered by the MS to be effective in maintaining a balance between capacity and fishing opportunities.

Slovenia reports serious reservations regarding the application and appropriateness of the indicators as defined in the guidelines owing to the characteristics of the Slovenian fishing sector, which have not been addressed or foreseen when preparing the indicators. The fleet report argues “These indicators do not take account of the past efforts carried out for the reduction of fishing effort. The size (number of vessels and active fishermen) of the whole fisheries sector and the size of individual fleet segments, which are very small (sometimes only 2 vessels), have not been regarded when deciding on these indicators.”

The annual fleet report, states that Slovenia is committed to achieving the objectives of the Common Fisheries Policy but, at the same time, suggests that consideration needs to be given to the extremely low level of landings by volume in the Slovenian fishery sector.

Discrepancies in previous fleet reports

The Member State calculated all the economic indicators and one of the biological indicators, in accordance with the Commission Guidelines (COM (2014)545). However, the Member State provided indicators for some but not all, segments of the national fleet. There were also differences in the Inactive Vessel Indicator values between those reported in the fleet report and those computed by the EWG 25-12.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

EWG 25-12 notes that the MS does not explicitly identify any structural overcapacity. Profitability is assessed according to the values for RoFTA.

Overview of action plan

Slovenia has implemented multiannual management measures and plans for Adriatic small pelagic stocks from 2013 to 2024 (GFCM recommendation measures). Additionally, in 2019, the Member States adopted the Recommendations of the GFCM on a multiannual management plan for sustainable demersal stocks in the Adriatic Sea. This plan includes a 30-day uninterrupted closure of fishing activities, covering at least 20% of the national territorial sea for OTB, PTB, OTT, and TBB, a reduction in fishing effort, and achieving the MSY target by 2026. According to the aforementioned action plans, there are Seasonal Fishing Closures (2023–2024), such as temporary suspensions for sardine (17–31 March), for anchovy (1–15 April), and for demersal fisheries (1–30 April). Slovenia complies with the entry/exit regime and is also a member of the ADRIATICA framework for the sub-regional management of shared stocks under CFP Article 18 of Regulation No 1380/2013.

Adjustment of targets and tools

The Member State adopted a new multiannual plan for the management of fisheries exploiting small pelagic stocks in geographical subarea 17 (northern Adriatic Sea) based on Recommendation GFCM/44/2021/20. The plan is a continuation of the previous multiannual action plan for small pelagic stocks and will be implemented from 2025 to 2029, following the end of the transitional fishing regime, which was extended until 2024. Vessels actively fishing for anchovy and sardine stocks are subject to the management measures of this plan.

Number of vessels

No new or revised action plans have been submitted by the Member State.

4.4.21 Spain (ESP)

Overview of indicator findings

In Area 27, 37 and OFR there were 99 fleet segments in 2023, of which 17 were inactive. Of the 82 active segments, landings data were provided for 68 fleet segments and economic data aggregated by 52 fleet segments. Results are presented by main supra-regions cited before in below paragraphs, except for the OMR, which was analysed separately.

4.4.21.1 Area 27

There were 39 fleet segments in 2023, of which 33 were active. Of the 33 active segments, landings data were provided for 33 fleet segments and economic data were available for 26 aggregated fleet segments. The Spanish in Area 27 fishing fleet in 2023 consisted of 5490 vessels. Of these, 4765 vessels (86.8%) were active, while 725 (13.%) were inactive.

Sustainable harvest indicator (SHI)

Of the fleet segments active in 2023, landing values were reported for 26 aggregated fleet segments, while SHI indicator values were available for 17.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 16 fleet segments cannot be used meaningfully to assess the balance or imbalance because

the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 17 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 61.77% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 2 fleet segments were **out of balance** with fishing opportunities;
- 15 fleet segments were **in balance** with fishing opportunities.

Trends were available for the 17 fleet segments:

- 2 fleet segments displayed an **improving** trend,
- 14 segments displayed **no clear** trend,
- 1 fleet segment displayed a **deteriorating** trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 33 fleet segments in 2023. According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 values indicate:

- 20 fleet segments were **in balance** with fishing opportunities,
- 13 fleet segments were **out of balance** with fishing opportunities.
 2 fleet segments with 6 stocks-at-risk **are out of balance** with fishing opportunities;
 1 fleet segment with 5 stocks-at-risk **are out of balance** with fishing opportunities;
 2 fleet segments with 4 stocks-at-risk **are out of balance** with fishing opportunities;
 2 fleet segments with 2 stocks-at-risk **are out of balance** with fishing opportunities;
 1 fleet segments with 10 stock-at-risk **are out of balance** with fishing opportunities;
 5 fleet segments with 1 stock-at-risk **are out of balance** with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	13	16		1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI Value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	23	7	2	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 26 fleet segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 16 were **in balance** with fishing opportunities

- 10 are **out of balance** with fishing opportunities,

Trends could be calculated for 24 segments:

- 8 clusters displayed an **improving** trend,
- 16 clusters displayed a **deteriorating** trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 26 fleet segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 15 clusters are **in balance** with fishing opportunities,
- 11 clusters are **out of balance** with fishing opportunities.

Trends could be calculated for 25 segments:

- 6 clusters displayed an **improving** trend,
- 17 clusters displayed a **deteriorating** trend.
- 1 cluster displayed **no clear** trend

The Vessel Use Indicator (VUR)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for the 33 segments: In accordance with the Commission guidelines, the EWG notes that the VUR values for 2023 indicate:

- 20 segments were **in balance** with fishing opportunities,
- 13 segments were **out of balance** with fishing opportunities,

Trends could be calculated for 31 segments:

- 2 segments displayed an **improving** trend,
- 26 segments displayed **no clear** trend,
- 3 segments displayed a **null/flat** trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends (Area 27 NAO)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.21.1.

Table 4.4.21.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

			Status 2023					Status 2023							
			Economic					Biological							
SR	Fleet segment/clustered segment	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing_tech	vessel_length	N vessels	SAR	SHI	EDI	VUR	VUR ₂₀₂₀
NAO	ESP NAO DFN1012 NGI	117						DFN	VL1012	117					
NAO	ESP NAO DFN1218 NGI	126						DFN	VL1218	126					
NAO	ESP NAO DFN1824 NGI *	21						DFN	VL1824	21					
NAO	ESP NAO DFN1824 NGI *	2						DFN	VL2440	2					
NAO	ESP NAO DRB0010 NGI	1071						DRB	VL0010	1071					
NAO	ESP NAO DRB1012 NGI	23						DRB	VL1012	23					
NAO	ESP NAO DRB1218 NGI	85						DRB	VL1218	85					
NAO	ESP NAO DTS1218 NGI *	7						DTS	VL1012	7					
NAO	ESP NAO DTS1218 NGI *	57						DTS	VL1218	57					
NAO	ESP NAO DTS1824 NGI	74						DTS	VL1824	74					
NAO	ESP NAO DTS2440 NGI	89						DTS	VL2440	89					
NAO	ESP NAO DTS40XX NGI	12						DTS	VL40XX	12					
NAO	ESP NAO FPO1012 NGI	79						FPO	VL1012	79					
NAO	ESP NAO FPO1218 NGI	56						FPO	VL1218	56					
NAO	ESP NAO HOK1012 NGI *	4						HOK	VL0010	4					
NAO	ESP NAO HOK1012 NGI *	59						HOK	VL1012	59					
NAO	ESP NAO HOK1218 NGI	74						HOK	VL1218	74					
NAO	ESP NAO HOK1824 NGI	30						HOK	VL1824	30					
NAO	ESP NAO HOK2440 LLD *	2						HOK	VL1218	2					
NAO	ESP NAO HOK2440 LLD *	8						HOK	VL1824	8					
NAO	ESP NAO HOK2440 LLD *	27						HOK	VL2440	27					
NAO	ESP NAO HOK2440 NGI	49						HOK	VL2440	49					
NAO	ESP NAO PG0010 NGI	25						PG	VL0010	25					
NAO	ESP NAO PGP2440 NGI *	3						PGP	VL1824	3					
NAO	ESP NAO PGP2440 NGI *	53						PGP	VL2440	53					
NAO	ESP NAO PMP0010 NGI	2333						PMP	VL0010	2333					
NAO	ESP NAO PMP1012 NGI	16						PMP	VL1012	16					
NAO	ESP NAO PMP1218 NGI	13						PMP	VL1218	13					
NAO	ESP NAO PS 1012 NGI *	1						PS	VL0010	1					
NAO	ESP NAO PS 1012 NGI *	18						PS	VL1012	18					
NAO	ESP NAO PS 1218 NGI	85						PS	VL1218	85					
NAO	ESP NAO PS 1824 NGI	88						PS	VL1824	88					
NAO	ESP NAO PS 2440 NGI	58						PS	VL2440	58					
Total active		4765													
Total inactive		725													
% inactive to total		15.22													

			Trends 2019-2023					Trends 2019-2023						
			Economic					Biological						
SR	Fleet segment/clustered segment	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing_tech	vessel_length	N vessels	SHI	EDI	VUR	VUR ₂₀₂₀
NAO	ESP NAO DFN1012 NGI	117						DFN	VL1012	117				
NAO	ESP NAO DFN1218 NGI	126						DFN	VL1218	126				
NAO	ESP NAO DFN1824 NGI *	21						DFN	VL1824	21				
NAO	ESP NAO DFN1824 NGI *	2						DFN	VL2440	2				
NAO	ESP NAO DRB0010 NGI	1071						DRB	VL0010	1071				
NAO	ESP NAO DRB1012 NGI	23						DRB	VL1012	23				
NAO	ESP NAO DRB1218 NGI	85						DRB	VL1218	85				
NAO	ESP NAO DTS1218 NGI *	7						DTS	VL1012	7				
NAO	ESP NAO DTS1218 NGI *	57						DTS	VL1218	57				
NAO	ESP NAO DTS1824 NGI	74						DTS	VL1824	74				
NAO	ESP NAO DTS2440 NGI	89						DTS	VL2440	89				
NAO	ESP NAO DTS40XX NGI	12						DTS	VL40XX	12				
NAO	ESP NAO FPO1012 NGI	79						FPO	VL1012	79				
NAO	ESP NAO FPO1218 NGI	56						FPO	VL1218	56				
NAO	ESP NAO HOK1012 NGI *	4						HOK	VL0010	4				
NAO	ESP NAO HOK1012 NGI *	59						HOK	VL1012	59				
NAO	ESP NAO HOK1218 NGI	74						HOK	VL1218	74				
NAO	ESP NAO HOK1824 NGI	30						HOK	VL1824	30				
NAO	ESP NAO HOK2440 LLD *	2						HOK	VL1218	2				
NAO	ESP NAO HOK2440 LLD *	8						HOK	VL1824	8				
NAO	ESP NAO HOK2440 LLD *	27						HOK	VL2440	27				
NAO	ESP NAO HOK2440 NGI	49						HOK	VL2440	49				
NAO	ESP NAO PG0010 NGI	25						PG	VL0010	25				
NAO	ESP NAO PGP2440 NGI *	3						PGP	VL1824	3				
NAO	ESP NAO PGP2440 NGI *	53						PGP	VL2440	53				
NAO	ESP NAO PMP0010 NGI	2333						PMP	VL0010	2333				
NAO	ESP NAO PMP1012 NGI	16						PMP	VL1012	16				
NAO	ESP NAO PMP1218 NGI	13						PMP	VL1218	13				
NAO	ESP NAO PS 1012 NGI *	1						PS	VL0010	1				
NAO	ESP NAO PS 1012 NGI *	18						PS	VL1012	18				
NAO	ESP NAO PS 1218 NGI	85						PS	VL1218	85				
NAO	ESP NAO PS 1824 NGI	88						PS	VL1824	88				
NAO	ESP NAO PS 2440 NGI	58						PS	VL2440	58				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Based on indicator values for 2023 and trends over 2019–2023, and following the Commission guidelines, a considerable number of fleet segments remain out of balance with fishing opportunities in Spanish fleets operating in Area 27. The biological indicators suggest that more than half of the segments with a meaningful SHI assessment are out of balance. While some positive developments can be seen over time (PS), the trends for the most important segments (DTS) are not clearly improving.

According to the SAR index, some fleet segments continue to exploit stocks at risk, with only limited exceptions (notably some FPO, and PMP sub-segments). Fleet segments such as DFN, DTS (notably DTS18–24, DTS24–40, and DTS40XX) and HOK appear out of balance.

From an economic perspective, key fleet segments including DTS, PMP and PS are out of balance according to CR/BER and RoFTA. Trends between 2019 and 2023 suggest gradual improvement for a limited number of segments, while for several of the most important segments the situation is deteriorating. In particular, small trawlers (<24m) and especially larger purse seiners (>18m) consistently display weak economic performance.

4.4.21.2 Area 37

There were 32 fleet segments in 2022, of which 27 were active. Of the 27 active segments, landings data were provided for 27 fleet segments and economic data aggregated by 20 fleet segments. The Spanish fishing fleet operating in Area 37 in 2023 consisted of 2238 vessels. Of these, 1900 vessels (82.7%) were active, while 298 (17.3%) were inactive.

Sustainable harvest indicator (SHI)

Out of 32 fleet segments active in 2022, SHI indicator values were available for 11.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 21 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 11 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 78.2% of the total value of the landings in 2022 provided by the MS: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 5 fleet segments were **out of balance** with fishing opportunities,
- 6 fleet segments were **in balance** with fishing opportunities.

Trends were available for the 4 fleet segments:

- 4 fleet segments displayed a **deteriorating** trend,

Stocks at Risk Indicator (SAR)

SAR indicator was available for 27 active fleet segments in 2023. According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the values indicate:

- 14 fleet segments were **in balance** with fishing opportunities,

- 13 fleet segments were *out of balance* with fishing opportunities:
4 fleet segments with 2 stocks-at-risk out of balance with fishing opportunities,
9 fleet segments with 1 stock-at-risk are out of balance with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments were given in the table below:

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2	17	2	

Economic Dependency Indicator (EDI)

Fleet segments' distribution over EDI classes is shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	19	2	2	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 20 segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 13 segments were *in balance* with fishing opportunities,
- 7 segments were *out of balance* with fishing opportunities,

Trends could be calculated for 18 segments:

- 7 segments displayed an *improving* trend,
- 11 segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 20 segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 17 segments were *in balance* with fishing opportunities,
- 3 segments were *out of balance* with fishing opportunities.

Trends could be calculated for 18 segments:

- 5 segments displayed an *improving* trend,
- 11 segments displayed a *deteriorating* trend,
- 2 segments displayed *no clear* trend.

The Vessel Use Indicator (VUR)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for the 27 segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 17 segments were *in balance* with fishing opportunities,
- 10 segments were *out of balance* with fishing opportunities.

Trends were calculated for 24 segments:

- 2 segments displayed an *improving* trend,
- 21 segments displayed *no clear* trend,
- 1 segment displayed a *null/flat* trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends (Area 37, MBS)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.21.2.

Table 4.4.21.2. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Based on indicator values for 2023 and trends over 2019–2023, and following the criteria in the Commission guidelines, several fleet segments remain out of balance with fishing opportunities. The SHI suggests that about half of the segments for which a meaningful indicator could be calculated (mainly DTS) are out of balance with trends point improvements in for the most of them.

According to the SAR index, most fleet segments continue to exploit stocks at risk, with some exceptions (notably some FPO and PMP sub-segments). Out-of-balance situations are evident mainly for DFN, DTS, HOK and PS fleet segments.

From an economic perspective, important segments such as DTS (with the exception of DTS12-18), DRB (except for DRB06–12), HOK12-18 and 18-24 and PS06-12 are out of balance according to CR/BER and RoFTA. While some improvement is visible for a limited number of segments, the general trend indicates deterioration in several of them.

4.4.21.3 OFR

There were 12 fleet segments in 2022, of which 8 were active. Of the 8 active segments, landings data were provided for 8 fleet segments and economic data aggregated by 6 fleet segments. The Spanish fishing fleet operating in Area OFR in 2023 consisted of 210 vessels. Of these, 191 vessels (91%) were active, while 19 (9%) were inactive.

Sustainable harvest indicator (SHI)

Out of 8 fleet segments active in 2022, SHI indicator values were available for 3.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 5 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 3 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 63.14% of the total value of the landings provided by the MS, and were as follows: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 2 fleet segments were *in balance* with fishing opportunities,
- 1 fleet segment was *out of balance* with fishing opportunities.

Trends were available for 3 fleet segments:

- 1 fleet segment displayed a *deteriorating* trend.
- 2 fleet segments displayed *no clear trend*

Stocks at Risk Indicator (SAR)

SAR indicator was available for the 8 fleet segments active in 2022. According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the values indicate:

- 2 fleet segments were in balance with fishing opportunities,
- 6 fleet segments were out of balance with fishing opportunities.
 - 1 fleet segment with 5 stock-at-risk is out of balance fishing opportunities
 - 1 fleet segment with 4 stock-at-risk is out of balance with fishing opportunities.
 - 2 fleet segments with 3 stocks-at-risk are out of balance with fishing opportunities,
 - 1 fleet segment with 2 stock-at-risk is out of balance with fishing opportunities,
 - 1 fleet segment with 1 stock-at-risk is out of balance with fishing opportunities.

Number of Overharvested Stocks (NOS)

The proportional distribution of NOS for the 7 fleet segments for which SHI has been calculated is shown in the table below:

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	4	2	1	

Economic Dependency Indicator (EDI)

Fleet segments' distribution over EDI classes is shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	4	2	1	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 6 segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 3 segments were *in balance* with fishing opportunities,
- 3 segments were *out of balance* with fishing opportunities.

Trends could be calculated for 6 segments:

- 3 segments displayed an *improving* trend,
- 3 segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 6 fleet segments: In accordance with the Commission guidelines, the EWG notes that the values for 2023 indicate:

- 3 segments were *in balance* with fishing opportunities,
- 3 segments were *out of balance* with fishing opportunities.

Trends could be calculated for 6 clusters:

- 2 segments displayed an *improving* trend,
- 2 segments displayed a *deteriorating* trend;
- 2 segments displayed *no clear* trend.

The Vessel Use Indicator (VUR)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for 8 segments. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 8 segments were *in balance* with fishing opportunities.

Trends could be calculated for 8 segments:

- 1 segment displayed a *flat* trend,
- 7 segments displayed *no clear* trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends (Other fishing regions; OFR)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in Table 4.4.21.3.

Table 4.4.21.3. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance

insufficiently profitable

out of balance

bordeline

insufficient data

Status 2023

Economic

CR/BER

RoFTA

ROI

NP margin

NVA/FTE

fishing_tech

vessel_length

Nvessels

Biological

SHI

EDI

Technical

VUR

VUR₂₂₀

SR	Fleet segment/clustered segment	Nvessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing_tech	vessel_length	Nvessels	SAR	SHI	EDI	VUR	VUR ₂₂₀
OFR	ESP OFR DTS2	40						DTS	VL2440	40					
OFR	ESP OFR DTS4	28						DTS	VL40XX	28					
OFR	ESP OFR HOK2	61						HOK	VL2440	61					
OFR	ESP OFR HOK2	2						HOK	VL1824	2					
OFR	ESP OFR HOK2	5						HOK	VL2440	5					
OFR	ESP OFR HOK2	2						HOK	VL40XX	2					
OFR	ESP OFR HOK4	28						HOK	VL40XX	28					
OFR	ESP OFR PS 40	25						PS	VL40XX	25					
Total active		191													
Total inactive		19													
% inactive to total		9.95													

improving

deteriorating

null/flat trend

insufficient data

no clear trend

no data

Trends 2019-2023

Economic

CR/BER

RoFTA

ROI

NP margin

NVA/FTE

fishing_tech

vessel_length

Nvessels

Biological

SHI

EDI

Technical

VUR

VUR₂₂₀

SR	Fleet segment/clustered segment	Nvessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing_tech	vessel_length	Nvessels	SHI	EDI	VUR	VUR ₂₂₀
OFR	ESP OFR DTS2	40						DTS	VL2440	40				
OFR	ESP OFR DTS4	28						DTS	VL40XX	28				
OFR	ESP OFR HOK2	61						HOK	VL2440	61				
OFR	ESP OFR HOK2	2						HOK	VL1824	2				
OFR	ESP OFR HOK2	5						HOK	VL2440	5				
OFR	ESP OFR HOK2	2						HOK	VL40XX	2				
OFR	ESP OFR HOK4	28						HOK	VL40XX	28				
OFR	ESP OFR PS 40	25						PS	VL40XX	25				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Based on indicator values for 2023 and trends over 2019–2023, and in line with the Commission guidelines, a number of key fleet segments remain out of balance with fishing opportunities. The biological indicators suggest that several of the DTS, HOK, and PS segments were operating under conditions of imbalance. Although some improvements are noted in individual indicators, the overall trends for these major fleets do not point to a clear recovery.

According to the SAR index, most of these fleets continue to target stocks at risk. In particular, DTS and PS, appear consistently out of balance biologically.

From the economic perspective, DTS (especially larger classes), HOK, and PS display good performance across CR/BER and RoFTA, placing them out of balance. While a few fleet segments display signs of gradual improvement, most of the major categories exhibit either stagnation or deterioration in economic indicators.

Status and trends for the Spanish fleet in all regions (NAO, MBS and OFR)

Based on the SAR indicator values for 2023 and following the criteria established in the Commission Guidelines (COM(2014) 545 final) and their update for outermost regions (COM(2024) 223 final), approximately half of the Spanish fleet segments (considering also those active in Canary Islands) may be considered in balance with fishing opportunities. The SAR indicator was computed for all 79 fleet segments, while a meaningful Sustainable Harvest Indicator (SHI) could only be calculated for 37 segments. In accordance with the guidelines, the SHI can only be meaningfully assessed when the stocks used in the calculation represent at least 40% of the total value of landings for a given segment. On this basis, 37 out of 79 active segments met the data coverage threshold required for biological assessment. Of these, 13 fleet segments were identified as potentially being in balance according to both biological indicators (SHI and SAR), meaning that they rely primarily on sustainably exploited stocks and have limited exposure to stocks at biological risk.

The economic indicators (CR/BER and ROFTA) suggest that approximately 42% of the fleet segments are in balance from an economic perspective, although several of these segments exhibit deteriorating profitability trends, mainly due to increased non-variable costs and reduced revenue during 2023.

Regarding the Vessel Utilisation Rate (VUR), the data indicate that only 27.8% of the fleet segments may be considered technically in balance with fishing opportunities. For the 74 segments where multi-year data were available, only five (ESP NAO PMP0010 IC*, ESP MBS PMP1218 NGI, ESP NAO PMP1218 NGI, ESP NAO PMP1012 NGI, and ESP MBS PS0612 NGI) displayed a clear improving trend in vessel activity between 2019 and 2023. For the remaining segments, the VUR trends were stable or inconclusive, reflecting variable fishing patterns, environmental conditions, and market dynamics.

Overall, while a substantial portion of the fleet indicates biological or economic balance, the limited overlap of valid SHI and SAR data, combined with mixed economic and VUR results, indicates that the overall balance situation remains heterogeneous across the Spanish fleet.

Comparison of indicator values

A comparison of indicator values computed by the EWG 25-12 and those in the fleet report submitted by the Member State in 2025 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

For 42 fleet segments, the SHI indicator values in the Spanish fleet report could not be used meaningfully to assess balance or imbalance, as the indicator values are based on stocks representing less than 40 % of the total value of landings by those fleet segments.

The SHI indicator was therefore considered meaningful for 39 of the 81 fleet segments reported by Spain. Most of these segments show similar SHI values and consistent assessments between the national fleet report and the STECF EWG 25-12 analysis.

However, notable discrepancies were identified for 5 fleet segments, where the SHI values differ by more than 0.1 between the two datasets, leading in some cases to different indications of balance for some fleet segments. In particular, for two segments (ESP OFR PS 40XX NGI and ESP OFR HOK 2440) the EWG 25-12 indicate that they are in balance, whereas the Member State's fleet report classified them as out of balance.

In contrast, one segment (ESP OFR DTS 2440 NGI*) was assessed by the Member State as in balance while the EWG 25-12 dataset indicated the segment to be out of balance. Moreover, for 15 fleet segments, EWG 25-12 provided meaningful SHI estimates where the Member State report considered that the indicator values were not meaningful due to limited data coverage.

The indicator trends for SHI were provided in the Member State fleet report for 9 segments only, and an improving trend in both the fleet report and the EWG 25-12 values was indicated for the MBS DTS1824 and MBS DTS2440 segments.

Stocks at Risk Indicator (SAR)

Results for the Stocks at Risk (SAR) indicator were provided by Spain in its 2025 fleet report (based on 2023 data). However, the report explicitly notes that the interpretation of this indicator should be approached with caution. According to the Spanish authorities, the percentage of catches attributed to stocks at risk may be distorted because non-EU fleets also exploit several of the same stocks, while data on total catches (EU and non-EU combined) are not fully available. Consequently, the "percentage of stock catches" used in the SAR calculation may overestimate the number of fleet segments appearing to fish stocks at risk.

According to the Spanish fleet report, at least 17 out of 79 fleet segments were identified as not in balance based on the SAR indicator; that is segments responsible for more than 10% of their catches from one or more stocks at biological risk and/or contributing to more than 10% of total catches from such stocks. This represents a smaller number than that identified by the STECF EWG 25-12, which found 40 fleet segments containing at least one stock at risk.

The EWG 25-12 analysis detected a higher number of stocks at risk in several fleet segments than reported by the Member State, for example ESP MBS HOK1218 NGI *, ESP MBS PS 2440 NGI *, ESP MBS DTS1218 NGI, ESP MBS PMP0612 NGI, ESP NAO DRB1218 NGI and ESP NAO PMP1218 NGI. These differences may be mainly due to the use of a broader

dataset of stock assessments and harmonised thresholds at the EU level, which capture risks not considered in the Member State's national assessment.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between the MS annual fleet report and the estimations from the EWG25-12 for the CR/BER indicator revealed similar outputs and the only discrepancies found was for one fleet cluster (ESP NAO DFN1218 NGI). For this cluster the EWG25-12 calculated it as "out of balance" while the MS as "in balance".

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

ROI data was not reported.

From the 85 fleet clusters the MS provided RoFTA values for 58 of them. The comparison between RoFTA reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed similar outputs. However, for one fleet segment (ESP ESP NAO DFN1218 NGI) the MS reported it in the annual fleet report as "out of balance", while the EWG 25-12 as "in balance".

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

Comparison of the VUR data reported in the MS annual fleet report and those estimated in the framework of EWG 25-15 revealed similar outputs for most indicator values.

In 2 fleet segments of 79 reported, however, the MS report differed from the EWG report as to whether segments were in or out of balance. The MS calculated one segment (ESP MBS PS 2440 NGI *) to be out of balance while the EWG estimated them to be in balance. The MS calculated one segment (ESP NAO FPO1218 NGI) to be in balance, however the EWG found it to be out of balance.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

The 2025 Annual Report on the Activity of the Spanish Fishing Fleet (2023 data) presents an updated assessment of balance indicators by fleet segment in accordance with the European Commission Guidelines COM(2014) 545 final and their update COM(2024) 223 final, which includes revised thresholds and assessment methods for fleets under 12 m operating in outermost regions.

The Spanish report evaluates 79 fleet segments (down from 84 in 2022) and identifies 14 segments as being out of balance with fishing opportunities. These segments account for approximately 783 active vessels, representing around 10 % of the fleet.

The EWG notes that an action plan has been provided for segments assessed by the Member State to be "out of balance," including NAO dredges (DRB1012, DRB1218) and multiple Mediterranean dredge and trawl segments, with measures extended through 2028.

The EWG notes that, in cases where indicators suggest a situation of imbalance but the Member State nevertheless considers the fleet segment to be in balance, the Member State provides supporting information and/or analyses (e.g., ICCAT/stock status references for Mediterranean swordfish and bluefin tuna; explanations about time-series requirements and segment composition that may distort economic indicators).

Spain applies the full set of biological (SHI and SAR), economic (CR/BER and ROFTA) and technical (VUR) indicators. Segments are considered in balance when:

- All indicators are favourable,
- Or one or more indicators are unfavourable but have not been imbalanced for three or more consecutive years,
- Or the SAR indicator is not significant for that segment.

The economic and technical indicators in the fleet report were largely consistent with the results obtained by STECF EWG 25-12 (2025).

Many of the issues raised by the EWG 22-13, EWG 23-13 and EWG 24-13 have largely been resolved and the remaining discrepancies previously identified between the MS and EWG 25-12 for the SAR and SHI indicators are smaller than reported in EWG 24-13.

Overview of action plan

The updated Action Plan 2025–2028 includes measures for newly identified imbalanced segments and extends or refines previous actions introduced in earlier plans. The plan aims to:

- Align fleet capacity with available fishing opportunities,
- Improve biological sustainability of vulnerable stocks, and
- Enhance economic viability in low-profitability segments.

Adjustment of targets and tools

North Atlantic (NAO)

Dredges – Segments NAO DRB 1012 and NAO DRB 1218

- Cause of imbalance: Dependence on overexploited Venus clam (*Chamelea gallina*) stocks in the Gulf of Cádiz.
- Objective:
Fish at maximum sustainable yield (MSY) levels with median effort < 0.8 kg/minute, Achieve CR/BER > 1.
- Implementation period: Extended from 2023–2025 to 2028.
- Measures:
Annual catch reduced from 2 000 t (2023) to 1 700 t (2024–2025).
Weekly catch limit reduced from 800 kg to 750 kg per vessel (5 hours/day, 5 days/week).
Decommissioning plan: withdraw capacity by scrapping 17 vessels in 2026 and 8 vessels in 2027.
EMFAF-funded temporary cessation support equivalent to 140 000 GT and 875 000 kW reduction.
Ongoing scientific monitoring by IEO–CSIC under the National Basic Data Programme.

Passive Gears < 12 m – Segment NAO PG 0010

- Cause of imbalance: Dependence on European eel (*Anguilla anguilla*), a species in critical conservation status.
- Objective: 40 % reduction in capacity for vessels targeting eel.
- Implementation period: 2025–2028.
- Measures:
Compliance with Council Regulation (EU) 2025/202, restricting glass eel fishing to 30 days/year and imposing a 6-month closure for eels > 12 cm.
Regional management plans (Asturias, Cantabria, Basque Country, Miño) introducing mortality-reduction and habitat-restoration actions.
Decommissioning plan: capacity withdrawal of 20 GT in 2026 and 20 GT in 2027.

Mediterranean (MBS)

Dredges – Segments MBS DRB 0006, MBS DRB 0612 and MBS DRB 1218

- Cause of imbalance: Persistent economic imbalance (short- and long-term).
- Objective: CR/BER ≥ 1 and ROFTA > TRP.
- Implementation period: Extended to 2028.
- Measures:
Updated Andalusian and Catalanian dredge management plans for bivalve molluscs (Orders of 24 March 2014, ARP/188/2020, ARP/122/2020).
Strengthened scientific monitoring of benthic impacts and resource recovery (2024–2027).
EMFAF support for temporary lay-ups reducing 2 315 GT and 19 412 kW.
Ongoing national seafood-promotion campaign — “Let us enjoy the vast choice of seafood and recipes this country has to offer.”

Bottom Trawlers – Segments MBS DTS 0612, DTS 1218, DTS 1824 and DTS 2440

- Cause of imbalance: Dependence on overfished blue and red shrimp and hake stocks.
- Objective: SHI ≤ 1 (achieve sustainable harvest levels).
- Implementation period: Extended to 2028.
- Measures:
Effort reduction under Council Regulation (EU) 2025/219, lowering fishing-day allocations.
Selectivity improvements (mesh sizes ≥ 45 –50 mm) and minimum-size rules (Order APA/312/2025).
Catch limits per vessel for shrimp (Order APA/467/2025).
Seasonal and permanent closures (Order APA/423/2020).
Decommissioning and capacity adjustment measures planned for 2026–2028 to accelerate resource recovery.
Reinforced control through PAGIP 2025, including cod-end certification and targeted inspections.

Number of vessels

For the NAO DRB 1012 and NAO DRB 1218 segments, the Member State includes a decommissioning plan for 2026 and 2027 with the following scrapping targets:

- 17 vessels in 2026, aiming at a 10% profitability improvement, and
- 8 vessels in 2027, aiming at a 15% profitability improvement.

These measures, initially planned for 2024–2025, were postponed and extended under the current action plan to align with the updated implementation period (2026–2028) and to ensure a gradual recovery of the Venus clam stock in the Gulf of Cádiz.

4.4.22 Sweden (SWE)

Overview of indicator findings

Area 27

There were 33 fleet segments in 2023, of which 28 were active. Of the 28 active segments, landings data were provided for all active fleet segments and economic data for 9 aggregate segments in 2023. The Swedish fishing fleet in 2023 consisted of 1032 vessels. Of these, 812 vessels (78.7%) were active, while 220 (21.3%) were inactive.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2023, landings in value have been provided aggregated in 28 fleet segments and SHI indicator values were available for 25.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 6 fleet segments cannot be used meaningfully to indicate balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The SHI indicator was available for 19 active fleet segments in 2023, accounting for 94.98% of the total value of the landings provided by MS for 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 13 (68.4%) segments were *in balance* with fishing opportunities
- 6 (31.6%) segments were *out of balance* with fishing opportunities

Trends could be calculated for 19 fleet segments:

- 3 fleet segments displayed a *deteriorating* trend,
- 8 fleet segments displayed an *improving* trend,
- 8 fleet segments displayed *no clear* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 28 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 11 (39.3%) segments were *in balance* with fishing opportunities
 - 17 (60.7%) segments were *out of balance* with fishing opportunities
- 6 fleet segments with 2 stocks-at-risk.
11 fleet segments with 1 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	14	8		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	18	4	3	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for 9 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5 (55.6%) segments were *in balance* with fishing opportunities
- 4 (44.4%) segments were *out of balance* with fishing opportunities

Trends were calculated for 9 segments:

- 3 segments displayed an *improving* trend,
- 5 segments displayed a *deteriorating* trend
- 1 segment showed a *no clear* trend

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 9 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 4 (44.4%) segments were *in balance* with fishing opportunities
- 5 (55.6%) segments were *out of balance* with fishing opportunities

Trends were calculated for 9 segments:

- 2 segments displayed an *improving* trend,
- 4 segments displayed a *deteriorating* trend,
- 3 segments displayed *no clear* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for 28 clustered segments: In accordance with the Commission guidelines, the EWG notes that the values indicate:

- all 28 fleet segments were *out of balance*

- All 28 segments displayed **no clear** trend

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Synthesis of indicators and trends

Based on indicator values for 2023 and trends over the periods 2019 to 2023 inclusive, according to the criteria in the Commission guidelines, most of the fleet segments appear to be out of balance with fishing opportunities. The economic indicators reported by cluster showed unfavourable results for the active gear DTS1012* (North Sea) and for all passive gear segments, and even the DFNVL1012* (North Sea) segment, which had performed well in 2022, showed a deterioration in 2023. The technical indicators are unfavourable for all segments. Both biological indicators showed a deterioration in relation to the EWG 24-13 report with 60.7% of the fleet segments out of balance for the SAR indicator (51.6% in 2022) and 31.6% for the assessed fleet segments out of balance for SHI (19.0% in 2022).

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in GTable 4.4.22.1.

Table 4.4.22.1. Status and trends of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	insufficiently profitable
	borderline
	insufficient data

Fleet segment/ clustered segment		N vessels		Status 2023			Fleet segment		N vessels		Status 2023			
				Economic							Biological		Technical	
				CR/BER	RoFTA	ROI					NP margin	NVA/FTE	SAR	SHI
SWE NAO DFN0008 NGI *	251						SWE NAO DFN VL0008 NGI	104	1					
							SWE NAO FPO VL0008 NGI	141	2					
							SWE NAO PGP VL0008 NGI	6	1					
SWE NAO DFN0010 NGI *	229						SWE NAO DFN VL0010 NGI	13	1					
							SWE NAO FPO VL0010 NGI	191						
							SWE NAO HOK VL0010 NGI	13						
							SWE NAO PGO VL0010 NGI	4						
							SWE NAO PGP VL0010 NGI	8						
SWE NAO DFN0812 NGI *	90						SWE NAO DFN VL0812 NGI	80	1					
							SWE NAO FPO VL0812 NGI	9	1					
							SWE NAO PGP VL0812 NGI	1	1					
SWE NAO DFN1012 NGI *	50						SWE NAO DFN VL1012 NGI	5	1					
							SWE NAO DFN VL1218 NGI	4	2					
							SWE NAO FPO VL1012 NGI	37						
							SWE NAO FPO VL1218 NGI	2						
							SWE NAO HOK VL1012 NGI	2						
SWE NAO DTS0812 NGI *	28						SWE NAO DTS VL0812 NGI	28	1					
							SWE NAO PMP VL0812 NGI	1						
							SWE NAO PS VL0812 NGI	1	1					
							SWE NAO TM VL0812 NGI	7	1					
							SWE NAO DRB VL1012 NGI	3						
SWE NAO DTS1012 NGI *	38						SWE NAO DTS VL1012 NGI	38						
SWE NAO DTS1218 NGI *	58						SWE NAO DTS VL1218 NGI	56						
							SWE NAO PS VL1218 NGI	2	2					
SWE NAO DTS1824 NGI *	34						SWE NAO DTS VL1824 NGI	29	2					
							SWE NAO TM VL1824 NGI	5	1					
SWE NAO DTS2440 NGI *	22						SWE NAO DTS VL2440 NGI	11	2					
							SWE NAO TM VL2440 NGI	11	2					
N° active vessels	812													
N° of inactive vessels	220													
% of inactive vessels	21%													

	improving
	deteriorating
	null/flat trend
	insufficient data
	no clear trend
	no data

		Trends 2019-2023							Trends 2019-2023		
		Economic							Biological		Technical
Fleet segment/ clustered segment	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment	N vessels	SHI	EDI	VUR
SWE NAO DFN0008 NGI *	251						SWE NAO DFN VL0008 NGI	104			
							SWE NAO FPO VL0008 NGI	141			
							SWE NAO PGP VL0008 NGI	6			
SWE NAO DFN0010 NGI *	229						SWE NAO DFN VL0010 NGI	13			
							SWE NAO FPO VL0010 NGI	191			
							SWE NAO HOK VL0010 NGI	13			
							SWE NAO PGO VL0010 NGI	4			
							SWE NAO PGP VL0010 NGI	8			
SWE NAO DFN0812 NGI *	90						SWE NAO DFN VL0812 NGI	80			
							SWE NAO FPO VL0812 NGI	9			
							SWE NAO PGP VL0812 NGI	1			
SWE NAO DFN1012 NGI *	50						SWE NAO DFN VL1012 NGI	5			
							SWE NAO DFN VL1218 NGI	4			
							SWE NAO FPO VL1012 NGI	37			
							SWE NAO FPO VL1218 NGI	2			
							SWE NAO HOK VL1012 NGI	2			
SWE NAO DTS0812 NGI *	28						SWE NAO DTS VL0812 NGI	28			
							SWE NAO PMP VL0812 NGI	1			
							SWE NAO PS VL0812 NGI	1			
							SWE NAO TM VL0812 NGI	7			
							SWE NAO DRB VL1012 NGI	3			
SWE NAO DTS1012 NGI *	38						SWE NAO DTS VL1012 NGI	38			
SWE NAO DTS1218 NGI *	58						SWE NAO DTS VL1218 NGI	56			
							SWE NAO PS VL1218 NGI	2			
SWE NAO DTS1824 NGI *	34						SWE NAO DTS VL1824 NGI	29			
							SWE NAO TM VL1824 NGI	5			
SWE NAO DTS2440 NGI *	22						SWE NAO DTS VL2440 NGI	11			
							SWE NAO TM VL2440 NGI	11			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

In the Swedish report, economic and technical indicators are available for 9 clustered segments grouped by main type of gear ('Passive' named as DFN and 'Active' named as DTS), vessel length and fishing area (Baltic and North Sea).

The following segmentation has therefore been used for the Swedish fleet report:

- Passive gears:
vessels < 8 m (Baltic Sea): SWE NAO DFN0008 NGI *
vessels 8-12 m (Baltic Sea): SWE NAO DFN0812 NGI *
vessels < 10 m (North Sea): SWE NAO DFN0010 NGI *
vessels 10-12 m (North Sea): SWE NAO DFN1012 NGI *
- Active gears:
vessels 8-12 m (Baltic Sea): SWE NAO DTS0812 NGI *
vessels 10-12 m (North Sea): SWE NAO DTS1012 NGI *
vessels 12-18 m: SWE NAO DTS1218 NGI *
vessels 18-24 m: SWE NAO DTS1824 NGI *
vessels > 24 m: SWE NAO DTS2440 NGI *

The biological indicator SHI and SAR values for the Swedish fleet report for 2024 were those given in the EWG 24-13 report and downloaded from STECF website.

A comparison between the values computed by the EWG 25-12 and those in the fleet report submitted by MS in 2025 is therefore not possible for the biological indicators.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparisons between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed the same outputs. For the segment SWE NAO DFN1012 NGI * the same value of CR/BER was observed (1), however the MS reported this value as *in balance* while EWG 25-12 values indicate the segment is *out of balance*.

In the MS report, there are no indications regarding the trend.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

As for the CR/BER indicator, the comparisons between RoFTA reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 revealed the same outputs for all values. As for CR/BER, all clusters were comparable.

In the MS report, there are no indication of trends.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the MS annual fleet report, the VUR Indicator was calculated as the ratio between average days at sea and maximum observed days at sea for each length category and gear group (for 9 segments identified by MS for 2023).

The VUR values for 2023 indicate all segments were out of balance which is in line with the values computed by the EWG 25-12. The Member State considers low values of the vessels use indicator in the entire fleet may be due to i) increased fuel costs, ii) the ban on cod fishing and pandemic-related effects. Also, MS notes that this indicator should be interpreted with caution, as the number of possible fishing days is affected by several factors, including

available quotas, fishing seasons, geographical and weather conditions, and the management system. In addition, some vessels, particularly in the smallest segments, seem to be used primarily as auxiliary boats.

The Inactive Fleet Indicators

The MS annual fleet report only shows the share of inactive vessels in length classes below and above 12 m and not for clustered segments.

In 2023, inactive vessels represented 21% of the overall Swedish fishing fleet. Among vessels over 12 meters, the share of inactive units was 17%, below the 20% threshold established in the guidelines. Conversely, within the segment of vessels under 12 meters, the proportion of inactive vessels reached 22%, slightly exceeding the threshold.

Data on the active and inactive fleet are given separately by Member State in Section 4.1 of this report.

Assessment of fleet report

With regard to the biological indicators (SHI, SAR), the MS fleet report refers to the indicators calculated by EWG 24-13; therefore, no further considerations could be made. Considering the economic and technical indicators, as in the fleet report for 2023, the Swedish fleet report for 2024 presents indicators for nine segments, categorized by vessel length group and by active or passive gear type. The results of this clustering system are not directly comparable with the EWG 25-12 outcomes.

In general, Sweden showed positive economic indicators in 2023 for the active gear segments (DTS), except for the DTS1012 segment, although the overall trend was negative. Conversely, the economic indicators for the passive gear segments (DFN) were mostly negative (except for 10–12 m vessels using passive gear in the North Sea).

In 2023, inactive vessels accounted for 21% of the total Swedish fishing fleet. Most inactive vessels are less than 12 meters in length. Among vessels longer than 12 meters, the share of inactive vessels in 2024 was 17%. In contrast, for vessels shorter than 12 meters, the share was 22%. It should be noted that, in this smaller-size segment, some vessels are primarily used as auxiliary boats.

No action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report and the previous action plan was not updated. The action plan submitted by Sweden in 2021 expired in 2022. The MS has implemented permanent cessation of fishing activities aimed at reducing overcapacity in fleet targeting cod in the Baltic Sea. From 2019 to 2023 the number of active vessels reduced from 925 to 812 (12%); the GT of the active fleet reduces from 26129 to 21931 (16%), the kW of the active fleet reduces from 40562 to 28723 (29%). Moreover, certain gears (e.g., cod-fishing gear) require a specific fishing permit in addition to a licence, serving as a tool to regulate fleet capacity. Entry–exit rules prevent capacity increases in line with EU law.

Since 2017, demersal fisheries have operated under an annual allocation of individual fishing opportunities, while a transferable fishing rights system has been in place for pelagic fisheries since 2020 (renewed for 10 years in 2019).

To improve fleet efficiency by reducing active vessels, the MS plans to replace the current annual allocation system in demersal fisheries with transferable fishing rights. The MS considers this approach simpler, more transparent, and economically beneficial, helping

fishers adjust their opportunities more easily. EWG 25-12 notes this proposal was also reported in 2024.

The EWG notes that the Member State justified the imbalance observed in certain segments by emphasising that, for the most part, these situations concern segments operating with passive gears and accounting for only limited catches (1–2% of the total) and their exploitation of available fishery resources is therefore not relevant.

Discrepancies in previous fleet reports

As commented in EWG 24-13, EWG 25-12 notices that the fleet segments are not identified in accordance with the fleet classification specified in the fleet economic data call under the DCF. This was not corrected in the 2025 fleet report.

MS identified segments 'Active' as DTS and 'Passive' as DFN for all segments. EWG 25-12 notes that the gear identification in clustered fleet segment could not consider the major fleet in the cluster. As an example, for DFN0010* the number of DFN vessels are 13 and FPO is 191.

EWG 25-12 notes that MS provided the VUR indicator at a clustered level and not for all the fleet segments separately. EWG 25-12 again stresses that, like the biologic indicators, technical indicator VUR should be estimated at fleet segment basis.

The MS continues to consider that the critical indicator levels for small scale passive gear segments should not necessarily be interpreted as overcapacity.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

Long-term profitability is identified in the report only on the basis of the economic indicators (RoFTA) specified in the guidelines. According to RoFTA passive gear segments (except for 10–12 m vessels using passive gear in the North Sea and one active gear segment (10–12 m vessels operating in the North Sea) are indicated to be out of balance.

Regarding the CR/BER indicator, most passive gear segments have been indicated to be out of balance since 2016, with the exception of 10–12 m vessels using passive gears in the North Sea. Since 2020, 10–12 m vessels using active gears in the North Sea have also been indicated to be imbalanced. For active gear segments, even where CR/BER values indicate "in balance", declining trends (deteriorating economic performance) have generally been observed in the economic indicator values.

MS highlights that the economic indicators suggest a potential overcapacity in most passive gear segments. However, since these segments contribute only a very small share of total Swedish catches (no more than 1–2%), their impact on fish resources is limited. Additionally, many licence holders in these segments are part-time fishers with other income sources, and there is considerable variation within the segments. MS highlights the low profitability in small-scale passive gear segments is linked to part-time activity, pandemic impacts, and rising fuel costs, reflected in the "out of balance" status of 3 out of 4 segments (SWE NAO DFN0008 NGI*, DFN0010 NGI*, DFN0812 NGI*) between 2019–2023. These segments account for 92% of vessels but only 7% of total landing value.

The MS reports that rising costs, the pandemic, and the 2020 Baltic cod fishing ban contributed to poor performance in some segments. Landed weight and value declined in 2022 but slightly improved in 2023.

For active gear fleets, measures to limit overcapacity, especially in the DTS VL2440 class, appear effective, with no overcapacity indicated except for SWE NAO DTS1012 NGI* (North Sea), which shows negative and worsening economic indicators. A similar trend was noted for SWE NAO DTS2440 NGI*. However, EWG 25-12 notes that after the decommission observed in 2022 and particularly in 2023, improvement in vessel utilisation and economic indicators could be expected for the 'Active' gear fleets.

Overview of action plan

No new or revised action plans were proposed by MS in 2025. The previous action plan, which expired in 2022, provided support for the permanent cessation of fishing activities for vessels that met specific activity criteria and were economically dependent on Baltic Sea cod. The vessels that received this aid have since left the Swedish fishing fleet, resulting in a corresponding reduction in fleet capacity.

Adjustment of targets and tools

No new or revised action plans have been submitted by the Member State.

Number of vessels

No new or revised action plans have been submitted by the Member State.

4.5 Overview of Action Plans

In response to Task 2h of the Terms of reference, Table 4.5.1. summarises for each Member State, the current status of Action Plans submitted with the fleet reports submitted in 2025 in relation to Action Plans already included or identified as on-going in the fleet reports submitted in 2024.

Table 4.5.1. Summary of action plans.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Belgium	2024	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Belgium	2025	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Bulgaria	2024	yes	update	No	No	No	The provided action plan is not based on the MS's overall assessment in fleet report and comparison of technical, economic and biological indicators for 2018-2022. The explanation provided about the planned measures is general and does not give enough information about specific MS actions to balance fleet capacity.
Bulgaria	2025	yes	update	No	Yes	No	The updated action plan provides a list of measures aiming at improving the balance of the Bulgarian fleet. The measures were added to the AP related to the EMFAF activities and does not have a link to the segments considered out of balance in the MS Fleet report. It is unclear how the proposed measures will improve the balance of the fleet.
Cyprus	2024	yes	Update	yes	yes	yes	Updated from 2023. Nevertheless, the time frame target for permanent cessation has been shifted from 2023 to 2024, due to delays in the preparation of the methodology to be used for compensating the owners for the permanent cessation. The related time frames for replacing the diamond meshed trawl net at the cod end, and for closing an area for trawling, have been moved from 2024 to 2025. The MS identified the concern regarding one fleet segment.
Cyprus	2025	yes	Update	yes	yes	yes	Updated from 2024. Nevertheless, the time frame target for permanent cessation has been shifted from 2024 to 2025, due to delays in the preparation of the methodology to be used for compensating the owners for the permanent cessation. The related time frames for replacing the diamond meshed trawl net at the cod end, and for closing an area for trawling, have been moved from 2025 to 2026.
Croatia	2024	yes	Continuation	yes	yes	yes	MS will continue to implement the actions prescribed in the 2023 action plan concerning the imbalance fleet segments. The actions are based on temporary and permanent cessations and completed with supplementary measures. The timeframe and targets are also defined for main actions.
Croatia	2025	yes	Continuation	yes	yes	yes	MS will continue to implement the actions prescribed in the 2023 action plan concerning the imbalance fleet segments. The actions are based on temporary and permanent cessations and completed with supplementary measures. The timeframe and targets are also defined for main actions.
Denmark	2024	yes	update	no	no	no	No new action plan with with a clear timeframe or targeted to specific imbalanced fleet segments was proposed. Only very general measures are included.
Denmark	2025	yes	update	yes	yes	no	No new action plan with with a clear timeframe or targeted to specific imbalanced fleet segments was proposed. Note was made of a fishery improvement plan carried out in 2024 with the objective to improve the Danish coastal fleet. No new action plan was deemed to be required.
Estonia	2024	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Estonia	2025	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Finland	2024	no	/	/	/	/	No action plan proposed by MS. The MS considers its fishing fleet to be in balance with fishing opportunities, with no identified structural overcapacity.
Finland	2025	no	/	/	/	/	No action plan proposed by MS. The MS considers its fishing fleet to be in balance with fishing opportunities, with no identified structural overcapacity.
France	2024	yes	update	yes	yes	yes	The AP was updated with 4 new segments. The actions for these segments do not relate to fleet capacity reduction. The plan contains a wide range of general as well as more-specific measures for imbalanced fleet segments. Objectives are clearly described.
France	2025	yes	update	yes	No	yes	The AP was updated including new imbalanced segments (Area 27 and Other regions), segments assessed to be in balance were removed. The plan contains a wide range of general as well as more-specific measures for imbalanced fleet segments. Objectives are clearly described but the timeframe and targets are not clear.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Germany	2024	yes	Update	yes	yes	yes	Updated from 2023. The AP includes a range of general measures (i.e., shifting relevant fishing opportunities to coastal fisheries, marketing support, suspension of fishing to protect cod stocks in the western Baltic Sea, suspension of fishing to protect herring stocks in the western Baltic Sea, and permanent cessation of fishing activities targeting cod and herring in the western Baltic), applicable to seven fleet segments for which problems have been identified.
Germany	2025	yes	Update	yes	yes	yes	Updated from 2024. The AP addresses structural imbalances mainly in small-scale coastal fisheries in the Baltic Sea and shrimp fisheries in the North Sea. To restore economic and biological balance, Germany intends to decommission up to one-third of its shrimp fleet from 2025, using public funding. The targets and tools are defined clearly and are the same as those described in the report submitted in 2023. The timeframe for implementation (starting and ending years) is described by fleet segment and measure.
Greece	2024	no	/	/	/	/	MS considers that certain fleet segments are not in balance with their fishing opportunities. An Action plan is in preparation but was not submitted with the annual fleet report. It is proposed to complete the action plan by the end of 2024
Greece	2025	no	/	/	/	/	No action plan proposed by the MS, justifications are provided in the fleet report
Ireland	2024	No	/	/	/	/	Based on the available information, Ireland considers that structural imbalance does not exist in with the fleet and no action plan is proposed.
Ireland	2025	No	/	/	/	/	Based on the available information, Ireland considers that structural imbalance does not generally exist with the fleet and no action plan is proposed.
Italy	2024	Yes	Update with some new actions added	Fleet segments provided by GSAs	Mostly	Mostly	The action plan (AP) presented in this year's fleet report is a revised version of last year's action plan. Specific tools for a reduction in fishing pressure have been adjusted, the MS presents a table with the scrapping targets per GSA by segment (period 2021-2027). The measures in the action plan presented by the MS are mostly GSA-specific. In the scrapping plan, the minimum tonnage to be withdrawn is provided by fleet segment per GSA, however, the number of vessels affected cannot be determined
Italy	2025	Yes	Update with some new actions added	Fleet segments provided by GSAs	Mostly	Mostly	The action plan (AP) presented in this year's fleet report is a revised version of last year's action plan. Specific tools for a reduction in fishing pressure have been adjusted, the MS presents a table with the scrapping targets per GSA by segment (period 2021-2027). The measures in the action plan presented by the MS are mostly GSA-specific. In the scrapping plan, the minimum tonnage to be withdrawn is provided by fleet segment per GSA, and the number of vessels affected is reported.
Latvia	2024	No	/	/	/	/	MS stated that the measures to balance the fleet segment VL2440, included in Annex VII of the Annual Report on the Latvian Fishing Fleet 2022, are in the implementation phase and the effect of the reduction of the segment should be evaluated in the following years.
Latvia	2025	No	/	/	/	/	MS stated that the measures to balance fleet segment VL2440, included in Annex VII of the Annual Report on the Latvian Fishing Fleet 2022, are in the implementation phase and the effect of the reduction of the segment should be evaluated in the following years.
Lithuania	2024	Yes	New	Yes	Yes	Yes	The AP foreseen 4 vessels of the NAO DTS VL2440 fleet segment would be withdrawn in 2024 with public compensation for permanent cessation, resulting in a 40% reduction in the fleet segment's total tonnage and a 42% decrease in power. The Lithuania Programme for the European Maritime Fisheries and Aquaculture Fund 2021–2027 aims, by the end of 2029, to withdraw vessel capacity expressed in gross tonnage (GT) of 468.00 and kW of 884.00 in terms of power.
Lithuania	2025	Yes	Update	Yes	Yes	Yes	The targets from the previous AP were partially achieved, the updated AP aims to continue the capacity reduction targeting the removal of one vessel in another fleet segment (NAO TM VL2440) using public compensation.
Malta	2024	yes	new	no	yes	Yes	The proposed action plan is largely a statement of intent to improve monitoring activities. Some measures have been specified such as equipping vessels with a tablet (to transmit catches electronically), a sampling plan for lampara), obliging all vessels to be equipped with VMS or GPRS tracking devices, prohibition of fishing in certain bays from middle of february to middle of july, etc.).
Malta	2025	yes	new/updated	no	yes (2024-onward)	yes	The proposed action plan is largely a statement of intent to improve monitoring activities. Some measures have been specified such as equipping vessels with a tablet (to transmit catches electronically), FIS (Fisheries Information System) for improving the data collection, a sampling plan for lampara), obliging all vessels to be equipped with VMS or GPRS tracking devices, prohibition of fishing in certain bays from middle of february to middle of july, etc.). Also proposed to utilize the activity level indicator to clarify the segments that are economically profitable or improving.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Netherlands	2024	No	/	/	/	/	The rationale given for not including any action plan is given as follows: "The consequences of the North Sea sole stock benchmark and the ongoing negotiations between the Coastal States on the pelagic stock management."
Netherlands	2025	No	/	/	/	/	No rationale for not presenting AP is given in the fleet report.
Poland	2024	yes	Update	yes	yes	yes	Updated from 2023. The AP clearly specifies the targets and tools. However, no specific implementation date was indicated, only that the plan is to be implemented over the 3-5 year period 2023-2027. The MS identified the concern regarding seven fleet segments operating in the Baltic Sea. The EWG 24-13 is unable to assess the extent to which the measures in the action plan are likely to redress the imbalance in the fleet segments concerned.
Poland	2025	yes	Update	yes	yes	yes	Updated from 2024. The revised AP identifies structural overcapacity in seven fishing fleet segments. It focuses on reducing the number of vessels in segments deemed permanently inefficient or economically imbalanced, optimising the distribution of fishing rights to support biological sustainability, and improving data collection and modelling to enhance long-term balance assessments. The implementation period remains unchanged, covering 2023–2027. EWG 25-12 notes that although the plan is coherent and clearly structured, it lacks specific implementation dates beyond the general three to five-year timeframe. Moreover, EWG notes some inconsistencies regarding the action on permanently withdrawn vessels from segments VL1218TM, VL1824TM and VL2440TM, for which such actions were not considered in the action plan.
Portugal	2024	yes	Update	yes	yes	yes	Action Plan from 2022 and extended to the end of 2025 which provides permanent cessation of activity of 16 vessels from the fleet HOK >12m. The AP is strengthened by temporary cessation measure in 2023 for 40 vessels from the same fleet. The AP is clear, targeted and limited in time.
Portugal	2025	yes	Continuation	yes	yes	yes	An ongoing Action Plan from 2022, extended to the end of 2025, is in place. The AP foresees the permanent cessation of activity of 18 vessels from the fleet HOK >12 m (VL1218 - 14 vessels, VL1824 - 3 vessels and VL2440 - 1 vessel) and a temporary cessation measure, which in 2024 is expected to
Romania	2024	yes	update	no	no	no	The action plan is largely a statement of intent to improve monitoring activities. The action plan proposed the previous year is still ongoing and ends in 2027. The action plan does not specifically target any fleet segments
Romania	2025	yes	update	no	no		The current Action plan proposes economic and technical measures for the fisheries sector in general and does not indicate any measures specific to fleet segments found to be out of balance. These measures are broad-
Slovenia	2024	No	/	/	/	/	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving a sustainable balance between fishing capacity and fishing opportunities. MS considers that all segments of Slovenian fleet are in balance and did not present an action plan.
Slovenia	2025	Yes	new/updated	yes	yes(2025-2029)	no	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving a sustainable balance between fishing capacity and fishing opportunities. MS continues to implement the existing National Management Plans, regulations and measures for small pelagic and demersal stocks. MS considers that all segments of Slovenian fleet are in balance and adopted a new Multiannual management plan was adopted (Recommendation GFCM/44/2021/20 on a multiannual management plan for the sustainable exploitation of small pelagic stocks in the Adriatic Sea (geographical subareas 17 and 18)). The plan will be implemented from 2025 to 2029, after the end of the transitional fishing regime that was prolonged until 2024. Vessels actively fishing for anchovy and sardine stocks are subject of the management measures of this plan
Spain	2023	Yes	New	Yes	Yes	Yes	New AP. The objectives are clearly defined and the measures to achieve them are described. The objectives are appropriately targeted to the fleet segments which are out of balance.
Spain	2024	Yes	Update	Yes	Yes	Yes	Updated from 2023, with some new measures, targets and tools for some segments. The objectives are clearly defined and the measures to achieve them are described.
Sweden	2024	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Sweden	2025	no	NA	NA	NA	NA	No new action plan or update has been presented.

* year - e.g 2025 relates to fleet report submitted by 31 May 2025.

**Appropriately targeted? - Are the measures in the AP specifically aimed at redressing the imbalance in the fleet segments concerned?

Source: own elaborations.

5. OUTERMOST REGIONS OF FRANCE, PORTUGAL AND SPAIN

5.1 Fleet Capacity in terms of numbers of vessels, Gross Tonnage and engine power.

Total fishing vessels, total inactive fishing vessels and proportion (%) inactive fishing vessels expressed by number, GT and engine power (kW) by length class, Member State and OMR are given in Table 5.1.1 to Table 5.1.9. respectively.

Table 5.1.1. Total number of vessels by length group and OMR by Member State and supra region in 2023. Abbreviations for different OMR territories are as follows: IC / Canary Islands; GF / French Guiana; GP / Guadeloupe; MQ / Martinique; RE / Réunion; YT / Mayotte; P2 / Madeira; P3 / Azores

REGION	NAO					OFR						
Vessel Length	VL0010	VL1012	VL1218	VL1824	VL2440	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
ESP	572	61	55	8	17			17				730
IC	572	61	55	8	17			17				730
FRA						1791	128		19	1	1	1940
GF						51	82		12			145
GP						567	23					590
MF						18						18
MQ						823	16		2			841
RE						197	5		5	1		208
YT						135	2				1	138
PRT	837	100	97	19	37			37				1127
P2	355	6	18	11	10			10				410
P3	482	94	79	8	27			27				717

Sources: Own elaborations; 2025 DCF Fleet Economic Data Call.

Table 5.1.2. Total number of inactive vessels by length group and OMR by Member State and supra region in 2023. IC / Canary Islands; GF / French Guiana; GP / Guadeloupe; MQ / Martinique; RE / Réunion; YT / Mayotte; P2 / Madeira; P3 / Azores

REGION	NAO					OFR						
Vessel Length	VL0010	VL1012	VL1218	VL1824	VL2440	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
ESP	124	10	6	1	2							143
IC	124	10	6	1	2							143
FRA						471	31		9		1	512
GF						18	15		6			39
GP						108	9					117
MF						5						5
MQ						241	4		1			246
RE						43	2		2			47
YT						56	1				1	58
PRT	423	24	48	9	10							514
P2	294	1	4	5	4							308
P3	129	23	44	4	6							206

Sources: Own elaborations; 2025 DCF Fleet Economic Data Call.

Table 5.1.3. Proportions (%) of inactive vessels by length group and OMR by Member State and supra region in 2023. Abbreviations for different OMR territories are as follows: IC / Canary Islands; GF / French Guiana; GP / Guadeloupe; MQ / Martinique; RE / Réunion; YT / Mayotte; P2 / Madeira; P3 / Azores

REGION	NAO					OFR						
Vessel Length	VL0010	VL1012	VL1218	VL1824	VL2440	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	%
ESP	22	16	11	13	12			0				20
IC	22	16	11	13	12			0				20
FRA						26	24		47	0	100	26
GF						35	18		50			27
GP						19	39					20
MF						28						28
MQ						29	25		50			29
RE						22	40		40	0		23
YT						41	50				100	42
PRT	51	24	49	47	27			0				46
P2	83	17	22	45	40			0				75
P3	27	24	56	50	22			0				29

Sources: Own elaborations; 2025 DCF Fleet Economic Data Call.

Table 5.1.4. Total gross tonnage of vessels by length group and OMR by Member State and supra region in 2023. Abbreviations for different OMR territories are as follows: IC / Canary Islands; GF / French Guiana; GP / Guadeloupe; MQ / Martinique; RE / Réunion; YT / Mayotte; P2 / Madeira; P3 / Azores

REGION	NAO					OFR						
Vessel Length	VL0010	VL1012	VL1218	VL1824	VL2440	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
ESP	8783.78	3358.66	19559.99	38534.94	113438.05			113438.05				297113.47
IC	8783.78	3358.66	19559.99	38534.94	113438.05			113438.05				297113.47
FRA						64356.85	53739.48		89073.72	241	67696	275107.05
GF						10172.78	11168.31		30430.55			51771.64
GP						11785.59	10717.46					22503.05
MF						10105.3						10105.3
MQ						11509.12	10705.49		29050.57			51265.18
RE						10492.71	10597.33		29592.6	241		50923.64
YT						10291.35	10550.89				67696	88538.24
PRT	19377.1	6656	18425	20673.4	65805.3			65805.3				196742.1
P2	9242.9	2886.2	8693.3	10376.1	31925.2			31925.2				95048.9
P3	10134.2	3769.8	9731.7	10297.3	33880.1			33880.1				101693.2

Sources: Own elaborations; 2025 DCF Fleet Economic Data Call.

Table 5.1.5. Total gross tonnage of inactive vessels by length group and OMR by Member State and supra region in 2023. Abbreviations for different OMR territories are as follows: IC / Canary Islands; GF / French Guiana; GP / Guadeloupe; MQ / Martinique; RE / Réunion; YT / Mayotte; P2 / Madeira; P3 / Azores

REGION	NAO					OFR						
Vessel Length	VL0010	VL1012	VL1218	VL1824	VL2440	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
ESP	178.79	64.87	98.14	61	309							711.8
IC	178.79	64.87	98.14	61	309							711.8
FRA						946.11	230.09		1072.86		2666	4915.06
GF						39.86	110.57		779.7			930.13
GP						300.61	72.08					372.69
MF						14.13						14.13
MQ						411.35	18.3		43.01			472.66
RE						66.08	24.83		250.15			341.06
YT						114.08	4.31				2666	2784.39
PRT	440.9	202.2	894.1	426.6	1722.9							3686.7
P2	179.1	11.6	154	260.3	1008.8							1613.8
P3	261.8	190.6	740.1	166.3	714.1							2072.9

Sources: Own elaborations; 2025 DCF Fleet Economic Data Call.

Table 5.1.6. Proportions (%) of gross tonnage of inactive vessels by length group and OMR by Member State and supra region in 2023. Abbreviations for different OMR territories are as follows: IC / Canary Islands; GF / French Guiana; GP / Guadeloupe; MQ / Martinique; RE / Réunion; YT / Mayotte; P2 / Madeira; P3 / Azores

REGION	NAO					OFR						
Vessel Length	VL0010	VL1012	VL1218	VL1824	VL2440	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	%
ESP	2	2	1	0	0			0				0
IC	2	2	1	0	0			0				0
FRA						1	0		1	0	4	2
GF						0	1		3			2
GP						3	1					2
MF						0						0
MQ						4	0		0			1
RE						1	0		1	0		1
YT						1	0				4	3
PRT	2	3	5	2	3			0				2
P2	2	0	2	3	3			0				2
P3	3	5	8	2	2			0				2

Sources: Own elaborations; 2025 DCF Fleet Economic Data Call.

Table 5.1.7. Total engine power (kW) of vessels by length group and OMR by Member State and supra region in 2023. Abbreviations for different OMR territories are as follows: IC / Canary Islands; GF / French Guiana; GP / Guadeloupe; MQ / Martinique; RE / Réunion; YT / Mayotte; P2 / Madeira; P3 / Azores

REGION	NAO					OFR						
Vessel Length	VL0010	VL1012	VL1218	VL1824	VL2440	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
ESP	100009.19	23727.59	88276.97	121126.98	233505.77			233505.77				800152.27
IC	100009.19	23727.59	88276.97	121126.98	233505.77			233505.77				800152.27
FRA						2318855	624390		284573	544	108665	3337027
GF						353420	128330		96542			578292
GP						453245	127517					580762
MF						353925						353925
MQ						436302	124737		93384			654423
RE						366739	122608		94647	544		584538
YT						355224	121198				108665	585087
PRT	286218.3	55820.2	102631.3	78739.8	169005.6			169005.6				861420.8
P2	134771.2	24150.8	48391.1	39863.1	81869.2			81869.2				410914.6
P3	151447.1	31669.4	54240.2	38876.7	87136.4			87136.4				450506.2

Sources: Own elaborations; 2025 DCF Fleet Economic Data Call.

Table 5.1.8. Total engine power (kW) of inactive vessels by length group and OMR by Member State and supra region in 2023. Abbreviations for different OMR territories are as follows: IC / Canary Islands; GF / French Guiana; GP / Guadeloupe; MQ / Martinique; RE / Réunion; YT / Mayotte; P2 / Madeira; P3 / Azores

REGION	NAO					OFR						
Vessel Length	VL0010	VL1012	VL1218	VL1824	VL2440	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total
ESP	1489.8	692.39	583.95	128.71	951							3845.85
IC	1489.8	692.39	583.95	128.71	951							3845.85
FRA						47076	6415		3140		3800	60431
GF						1125	1367		1942			4434
GP						17736	2693					20429
MF						508						508
MQ						23408	994		315			24717
RE						2080	1192		883			4155
YT						2219	169				3800	6188
PRT	5043.2	2085	4719.4	1634.5	4590.9							18073
P2	755.9	49.3	491.7	994.6	2622.8							4914.3
P3	4287.3	2035.7	4227.7	639.9	1968.1							13158.7

Sources: Own elaborations; 2025 DCF Fleet Economic Data Call.

Table 5.1.9. Proportions (%) of gross tonnage of inactive vessels by length group and OMR by Member State and supra region in 2023. Abbreviations for different OMR territories are as follows: IC / Canary Islands; GF / French Guiana; GP / Guadeloupe; MQ / Martinique; RE / Réunion; YT / Mayotte; P2 / Madeira; P3 / Azores

REGION	NAO					OFR						
Vessel Length	VL0010	VL1012	VL1218	VL1824	VL2440	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	%
ESP	1	3	1	0	0			0				0
IC	1	3	1	0	0			0				0
FRA						2	1		1	0	3	2
GF						0	1		2			1
GP						4	2					4
MF						0						0
MQ						5	1		0			4
RE						1	1		1	0		1
YT						1	0				3	1
PRT	2	4	5	2	3			0				2
P2	1	0	1	2	3			0				1
P3	3	6	8	2	2			0				3

Sources: Own elaborations; 2024 DCF Fleet Economic Data Call.

5.2 Indicator findings by Outermost Region and Member State

5.2.1 France (FRA)

Overview of indicator findings

There were 63 fleet segments in the French OMRs in 2023, of which 48 were active fleet segments. Indicator results are presented below by outermost region.

French Guiana

In the fleet of French Guiana, there were 8 fleet segments in 2023, of which 5 were active. Of the 5 active segments, landings data were provided for 5 segments and economic data for 4 fleet segments.

Sustainable harvest indicator (SHI)

Out of 5 fleet segments active in 2023, SHI indicator values were available for 4 fleet segments.

The 4 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 83.56% of the total value of the landings in 2023 provided by MS.

In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 (25%) fleet segment was *in balance* with fishing opportunities,
- 3 (75%) fleet segments were *out of balance* with fishing opportunities.

Trends could be calculated for 4 segments:

- 4 (25%) segments displayed *no clear* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for all 5 active fleet segments in 2023. In accordance with the Commission guidelines (COM(2025) 798 final), the EWG notes that the values indicate:

- 4 (80%) fleet segment was *in balance* with fishing opportunities,
- 1 (20%) fleet segments were *out of balance* with fishing opportunities,
1 fleet segment with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

For none of the 5 active fleets segments in 2023, the NOS indicator value was available.

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments		1	3	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 (25%) segment was *in balance* with fishing opportunities,
- 3 (75%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 4 segments:

- 4 segments (100%) displayed an *improving* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 (25%) segment was *in balance* with fishing opportunities,
- 3 (75%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 4 segments:

- 3 (75%) segments displayed an *improving* trend,
- 1 (25%) segment displayed *no clear* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here. The EWG calculate the VUR_{nn}, based on the theoretical number indicated by the MS. For French Guiana the theoretical number was 123 days at sea.

The VUR indicator was available for all 5 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 (20%) segment was *in balance* with fishing opportunities,
- 4 (80%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 5 segments:

- 1 (25%) segment displayed an *improving* trend,
- 4 (75%) segments displayed *no clear* trend.

The VUR_{nn} was calculated for 5 segments, and seems to indicate:

- 3 (60%) segment was *in balance* with fishing opportunities,
- 2 (40%) segments were *out of balance* with fishing opportunities.

No trend could be calculated.

The Inactive Fleet Indicators

In 2023, 3 vessel length classes had inactive vessels (VL0010, VL1012 and VL1824).

The inactive fleet accounted for 26.90% of the total number of vessels, 41.55% of the total GT and 30.63% of the total kW.

No trend could be calculated.

Data on the active and inactive fleet are given in Section 5.1 of this report.

Guadeloupe

In the fishing fleet of Guadeloupe, there were 20 fleet segments in 2023, of which 18 were active. Of the 18 active segments, landings data were provided for 17 segments and economic data for 10 aggregated fleet segments.

Sustainable harvest indicator (SHI)

Out of 17 fleet segments active in 2023, SHI indicator values were available for 17 fleet segments.

SHI indicator values for 2 fleet segments can be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise more than 40% of the total value of landings by those fleet segments.

The 15 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 99.51% of the total value of the landings in 2023 provided by MS.

In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 15 (100%) segments were *in balance* with fishing opportunities,

Trends could be calculated for 15 fleet segments:

- 1 (7%) segment displayed a *improving* trend,
- 14 (93%) segments displayed *no clear* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 17 active fleet segments in 2023. In accordance with the Commission guidelines (COM(2025) 798 final), the EWG notes that the values indicate:

- 17 (100%) fleet segments were *in balance* with fishing opportunities.

Number of Overharvested Stocks (NOS)

The NOS indicator value was not available for any of the 17 fleets segments active in 2023

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	17			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for 10 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5(50%) segments were *in balance* with fishing opportunities,
- 5(50%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 10 segments:

- 8 (80%) segments displayed an *improving* trend,
- 2 (20%) segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 10 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5 (50%) segments were *in balance* with fishing opportunities,
- 5 (50%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 10 segments:

- 3 (30%) segments displayed an *improving* trend,
- 2 (20%) segments displayed a *deteriorating* trend,
- 5 (50%) segments displayed *no clear* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator (VURⁿⁿ)

The data required to calculate VUR and VURⁿⁿ (i.e., maximum days-at-sea and theoretical maximum) were provided by the MS and thus, VUR₂₂₀ is not analysed here. The EWG calculated the VURⁿⁿ, based on the theoretical maximum number of days at sea indicated by the MS. For Guadeloupe the theoretical number was 122 days at sea. Hence the indicator is VUR¹²².

The VUR indicator was available for 18 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 3 (17%) segments were *in balance* with fishing opportunities,
- 15 (83%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 16 segments:

- 1 (6%) segment displayed an *improving* trend,
- 1 (6%) segment displayed a *deteriorating* trend,
- 14 (88%) segments displayed *no clear* trend.

The VUR¹²² was calculated for 17 segments, and indicate:

- 9 (53%) segments were *in balance* with fishing opportunities,
- 8 (47%) segments were *out of balance* with fishing opportunities.

No trend could be calculated.

The Inactive Fleet Indicators

In 2023, 2 vessel length classes had inactive vessels (VL0010 and VL1012).

The inactive fleet accounted for 19.83% of the total number of vessels, 19.25% of the total GT and 18.63% of the total kW.

No trend could be calculated.

Data on the active and inactive fleet are given in Section 5.1 of this report.

Martinique

In the fishing fleet of Martinique, there were 14 fleet segments in 2023, of which 11 were active. Of the 11 active segments, landings data were provided for 11 segments and economic data for 4 aggregated fleet segments.

Sustainable harvest indicator (SHI)

Out of 11 fleet segments active in 2023, SHI indicator values were available for 9 fleet segments.

The 9 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 99.67% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 9 (100%) segments were *in balance* with fishing opportunities.

Trends could be calculated for 7 fleet segments:

- 1 (14%) segment displayed an *improving* trend,
- 6 (86%) segments displayed *no clear* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 11 active fleet segments in 2023. In accordance with the Commission guidelines (COM(2025) 798 final), the EWG notes that the values indicate:

- 11 (100%) fleet segments were *in balance* with fishing opportunities.

Number of Overharvested Stocks (NOS)

The NOS indicator value was not available for any of the 11 active fleets segments in 2023.

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	9			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 4 (100%) segments were *in balance* with fishing opportunities,

Trends could be calculated for 4 segments:

- 4 (100%) segments displayed an *improving* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 4 (100%) segments were *in balance* with fishing opportunities.

Trends could be calculated for 4 segments:

- 4 (100%) segments displayed an *improving* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator (VUR^{nn})

The data required to calculate VUR and VUR^{nn} (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here. The EWG calculate the VUR^{nn} , based on the theoretical number of days at sea indicated by the MS. For Martinique the theoretical number was 86 days at sea. Hence the indicator is VUR^{86} .

The VUR indicator was available for 11 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5 (45%) segments were *in balance* with fishing opportunities,
- 6 (55%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 9 segments:

- 1 (11%) segment displayed a *null/flat* trend,
- 1 (11%) segment displayed a *deteriorating* trend,
- 7 (78%) segments displayed *no clear* trend.

The VUR⁸⁶ was calculated for 11 segments and indicates:

- 3 (27%) segments were *in balance* with fishing opportunities,
- 8 (73%) segments were *out of balance* with fishing opportunities.

No trend could be calculated.

The Inactive Fleet Indicators

In 2023, 3 vessel length classes had inactive vessels (VL0010, VL1012, and VL1824).

The inactive fleet accounted for 29.18% of the total number of vessels, 26.23% of the total GT and 27.17% of the total kW.

No trend could be calculated.

Data on the active and inactive fleet are given in Section 5.1 of this report.

La Réunion

In the fishing fleet of La Réunion, there were 10 fleet segments in 2023, of which 7 were active. Of the 7 active segments, landings data were provided for 7 segments and economic data for 2 aggregated fleet segments.

Sustainable harvest indicator (SHI)

Out of 7 fleet segments active in 2022, meaningful SHI indicator values were available for 7.

SHI indicator values for 2 fleet segments can be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise more than 40% of the total value of landings by those fleet segments.

The 5 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 99.58% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 5 (100%) segments were *in balance* with fishing opportunities,

Trends could be calculated for 4 fleet segments:

- 4 (100%) segments displayed *no clear* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 7 active fleet segments in 2023. In accordance with the Commission guidelines (COM(2025) 798 final), the EWG notes that the values indicate:

- 6 (86%) fleet segments were *in balance* with fishing opportunities,
- 1 (14%) fleet segment was *out of balance* with fishing opportunities,
- 1 segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2	3		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	7			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for 2 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (100%) segments were *in balance* with fishing opportunities.

Trends could be calculated for 2 segments:

- 2 (100%) segments displayed an *improving* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 2 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (100%) segments were *in balance* with fishing opportunities.

Trends could be calculated for 2 segments:

- 2 (100%) segments displayed an *improving* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator (VUR_{nn})

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here. The EWG calculate the VUR_{nn}, based on the

theoretical number indicated by the MS. For La Réunion the theoretical number was 121 days at sea. Hence the indicator is VUR¹²¹.

The VUR indicator was available for 7 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 6 (86%) segments were *in balance* with fishing opportunities,
- 1 (14%) segment was *out of balance* with fishing opportunities.

Trends could be calculated for 6 segments:

- 1 (17%) segment displayed an *improving* trend,
- 1 (17%) segment displayed a *deteriorating* trend,
- 4 (66%) segments displayed *no clear* trend.

The VUR¹²¹ was calculated for 7 segments, and seems to indicate:

- 4 (57%) segments were *in balance* with fishing opportunities,
- 3 (43%) segments were *out of balance* with fishing opportunities.

No trend could be calculated.

The Inactive Fleet Indicators

In 2023, 3 vessel length classes had inactive vessels (VL0010, VL1012 and VL1824).

The inactive fleet accounted for 20.98% of the total number of vessels, 18.15% of the total GT and 18.15% of the total kW.

Data on the active and inactive fleet are given in Section 5.1 of this report.

Mayotte

In the fishing fleet of Mayotte, there were 7 fleet segments in 2023, of which 4 were active. Of the 4 active segments, landings data were provided for 4 segments and economic data for 1 aggregated fleet segment.

Sustainable harvest indicator (SHI)

Out of 4 fleet segments active in 2023, SHI indicator values were available for 4.

SHI indicator values for 2 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 2 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 87.95% of the total value of the landings in 2023 provided by MS. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (100%) segments were *in balance* with fishing opportunities.

Trends could be calculated for 1 fleet segment:

- 1 (100%) segment displayed *no clear* trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines (COM(2025) 798 final), the EWG notes that the values indicate:

- 4 (100%) fleet segments were *in balance* with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	3			

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	4			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

The RoFTA indicator was available for 1 active fleet segment in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 (100%) segment was *in balance* with fishing opportunities.

Trends could be calculated for 1 segment:

- 1 (100%) segment displayed an *improving* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator was available for 1 active fleet segment in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 1 (100%) segment was *in balance* with fishing opportunities.

Trends could be calculated for 1 segment:

- 1 (100%) segment displayed an *improving* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR_{nn})

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here. The EWG calculate the VUR_{nn}, based on the

theoretical number indicated by the MS. For Mayotte the theoretical number was the 90th percentile of the distribution of days at sea for each segment. Hence the indicator is VUR₉₀.

The VUR indicator was available for 4 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (50%) segments were *in balance* with fishing opportunities,
- 2 (50%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 2 segments:

- 1 (50%) segment displayed a *deteriorating* trend,
- 1 (50%) segment displayed *no clear* trend.

The VUR₉₀ was calculated for 4 segments, and seems to indicate:

- 2 (50%) segments were *in balance* with fishing opportunities,
- 2 (50%) segments were *out of balance* with fishing opportunities.

No trend could be calculated.

The Inactive Fleet Indicators

In 2023, 3 vessel length classes had inactive vessels (VL0010, VL1012 and VL40XX). The vessel, over 40 metres long, should be assigned to the IWE geoindicator.

The inactive fleet accounted for 42.03% of the total number of vessels, 94.68% of the total GT and 67.95% of the total kW.

No trend could be calculated.

Data on the active and inactive fleet are given in Section 5.1 of this report.

Saint Martin

In the fishing fleet of Saint Martin, there were 4 fleet segments in 2023, of which 3 were active. Of the 3 active segments, landings data were provided for 2 segments, and no data was available to calculate economic balance indicators.

Sustainable harvest indicator (SHI)

Out of 3 fleet segments active in 2023, SHI indicator values were available for 1.

SHI indicator values for 1 fleet segment cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 2 active fleet segments in 2023. In accordance with the Commission guidelines (COM(2025) 798 final), the EWG notes that the values indicate:

- 2 (100%) fleet segments are *in balance* with fishing opportunities.

Number of Overharvested Stocks (NOS)

The NOS indicator value was not available for any of the 11 active fleets segments in 2023.

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1			

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here. The EWG calculate the VUR_{nn}, based on the theoretical number indicated by the MS. For Saint Martin the theoretical number was the 90th percentile of the distribution of days at sea for each segment. Hence the indicator is VUR₉₀.

The VUR indicator was available for 2 active fleet segments in 2023. In accordance with the Commission guidelines, the EWG notes that the values indicate:

- 2 (100%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 2 segments:

- 2 (100%) segments displayed an *improving* trend.

The VUR₉₀ was calculated for 2 segments, and seems to indicate:

- 2 (100%) segments were *out of balance* with fishing opportunities.

The Inactive Fleet Indicators

In 2023, 1 vessel length classes had inactive vessels (VL0010).

The inactive fleet accounted for 27.78% of the total number of vessels, 18.22% of the total GT and 13.82% of the total kW.

No trend could be calculated.

Data on the active and inactive fleet are given in Section 5.1 of this report.

Synthesis of indicators and trends (French OMRs)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines is illustrated in Table 5.2.1.1. for the French OMRs.

Table 5.2.1.1. Status and trends of Balance capacity indicators for the French OMRs.

					Economic indicators								Biological and technical indicators							
					Status 2023								Status 2023							
OMR	Fleet segment	fishing tech	vessel length	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	N vessels	SAR 2025	SAR20	SAR	SHI	EDI	VUR	VURnn	
French Guiana	FRA OFR DFN0010 GF A*	DFN	VL0010	19						DFN	VL0010	19		4	4					
	FRA OFR DFN0010 GF L*	DFN	VL0010	14						DFN	VL0010	14		2	3					
	FRA OFR DFN1012 GF A*	DFN	VL1012	53						DFN	VL1012	53	1	4	4					
	FRA OFR DFN1012 GF L*	DFN	VL1012	14						DFN	VL1012	14		1	1					
	FRA OFR DTS1824 GF*	DTS	VL1824	6						DTS	VL1824	6		na						
	FRA OFR INA0010 GF	INACTIVE	VL0010	18						INACTIVE	VL0010	18								
	FRA OFR INA1012 GF	INACTIVE	VL1012	15						INACTIVE	VL1012	15								
	FRA OFR INA1824 GF	INACTIVE	VL1824	6						INACTIVE	VL1824	6								
Guadeloupe	FRA OFR DFN0010 GP A*	DFN	VL0010	43						DFN	VL0010	42		1	1					
		PGO	VL0010							PGO	VL0010	1								
	FRA OFR DFN0010 GP L*	DFN	VL0010	53						DFN	VL0010	44								
		DFN	VL1012							DFN	VL1012	3								
		PGO	VL0010							PGO	VL0010	6								
	FRA OFR FPO0010 GP A*	FPO	VL0010	37						FPO	VL0010	36		1	1					
		FPO	VL1012							FPO	VL1012	1								
	FRA OFR FPO0010 GP L*	FPO	VL0010	53						FPO	VL0010	51								
		FPO	VL1012							FPO	VL1012	2								
	FRA OFR HOK0010 GP A*	HOK	VL0010	42						HOK	VL0010	39								
		HOK	VL1012							HOK	VL1012	3								
	FRA OFR HOK0010 GP L*	HOK	VL0010	69						HOK	VL0010	65								
		HOK	VL1012							HOK	VL1012	4								
	FRA OFR INA0010 GP	INACTIVE	VL0010	117						INACTIVE	VL0010	108								
	FRA OFR INA1012 GP	INACTIVE	VL1012							INACTIVE	VL1012	9								
	FRA OFR PGP0010 GP A*	PGP	VL0010	93						PGP	VL0010	93		1	1					
FRA OFR PGP0010 GP L*	PGP	VL0010	67						PGP	VL0010	66									
	PGP	VL1012							PGP	VL1012	1									
FRA OFR PS0010 GP A*	PS	VL0010	8						PS	VL0010	8									
FRA OFR PS0010 GP L*	PS	VL0010	8						PS	VL0010	8									
Martinique	FRA OFR DFN0010 MQ	DFN	VL0010	69						DFN	VL0010	69								
	FRA OFR FPO0010 MQ	FPO	VL0010	151						FPO	VL0010	151								
	FRA OFR HOK0010 MQ	HOK	VL0010	133						HOK	VL0010	133		1	1					
	FRA OFR INA0010 MQ	INACTIVE	VL0010	241						INACTIVE	VL0010	241								
	FRA OFR INA1012 MQ	INACTIVE	VL1012	4						INACTIVE	VL1012	4								
	FRA OFR INA1824 MQ	INACTIVE	VL1824	1						INACTIVE	VL1824	1								
	FRA OFR PGP0010 MQ*	FPO	VL1218	244						FPO	VL1218	1		na						
		FPO	VL1824							FPO	VL1824	1		na						
		HOK	VL1012							HOK	VL1012	10		1	1					
		HOK	VL1218							HOK	VL1218	1		na						
		PGO	VL0010							PGO	VL0010	25								
		PGP	VL0010							PGP	VL0010	202								
		PGP	VL1012							PGP	VL1012	2		1	1					
		PS	VL0010							PS	VL0010	2		1	1					
La Réunion	FRA OFR HOK0010 RE*	HOK	VL0010	157						HOK	VL0010	144								
		HOK	VL1012							HOK	VL1012	3		1	1					
		PGO	VL0010							PGO	VL0010	7								
		PGP	VL0010							PGP	VL0010	3								
	FRA OFR HOK1218 RE*	HOK	VL1218	20						HOK	VL1218	16	1	1	1					
		HOK	VL1824							HOK	VL1824	3		na						
		HOK	VL2440							HOK	VL2440	1		na						
	FRA OFR INA0010 RE	INACTIVE	VL0010	43						INACTIVE	VL0010	43								
	FRA OFR INA1012 RE	INACTIVE	VL1012	2						INACTIVE	VL1012	2								
FRA OFR INA1824 RE	INACTIVE	VL1824	2						INACTIVE	VL1824	2									
Mayotte	FRA OFR HOK0010 YT*	DFN	VL0010	80						DFN	VL0010	7								
		HOK	VL0010							HOK	VL0010	71		1	1					
		HOK	VL1012							HOK	VL1012	1								
		PGP	VL0010							PGP	VL0010	1								
	FRA OFR INA0010 YT	INACTIVE	VL0010	56						INACTIVE	VL0010	56								
FRA OFR INA1012 YT	INACTIVE	VL1012	1						INACTIVE	VL1012	1									
FRA OFR INA40XX YT	INACTIVE	VL40XX	1						INACTIVE	VL40XX	1									
Saint Martin	FRA OFR HOK0010 MF*	FPO	VL0010	13						FPO	VL0010	3								
		HOK	VL0010							HOK	VL0010	7								
		PGP	VL0010							PGP	VL0010	3								
	FRA OFR INA0010 MF	INACTIVE	VL0010	5						INACTIVE	VL0010	5								
		Total active	1446																	
		Total inactive	512																	
		%inactive to total	26.15																	

					Economic indicators								Biological and technical indicators				
					Trends 2019-2023								Trends 2019-2023				
OMR	Fleet segment	fishing_tech	vessel_length	N_vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FT E	fishing_tech	vessel_length	N_vessels	SHI	EDI	VUR	VURN	
French Guiana	FRA OFR DFN0010 GF A *	DFN	VL0010	19						DFN	VL0010	19					
	FRA OFR DFN0010 GF L *	DFN	VL0010	14						DFN	VL0010	14					
	FRA OFR DFN1012 GF A *	DFN	VL1012	53						DFN	VL1012	53					
	FRA OFR DFN1012 GF L *	DFN	VL1012	14						DFN	VL1012	14					
	FRA OFR DTS1824 GF *	DTS	VL1824	6						DTS	VL1824	6					
	FRA OFR INA0010 GF	INACTIVE	VL0010	18						INACTIVE	VL0010	18					
	FRA OFR INA1012 GF	INACTIVE	VL1012	15						INACTIVE	VL1012	15					
	FRA OFR INA1824 GF	INACTIVE	VL1824	6						INACTIVE	VL1824	6					
Guadeloupe	FRA OFR DFN0010 GP A *	DFN	VL0010	43						DFN	VL0010	42					
		PGO	VL0010							PGO	VL0010	1					
		DFN	VL0010							DFN	VL0010	44					
	FRA OFR DFN0010 GP L *	DFN	VL1012	53						DFN	VL1012	3					
		PGO	VL0010							PGO	VL0010	6					
	FRA OFR FPO0010 GP A *	FPO	VL0010	37						FPO	VL0010	36					
		FPO	VL1012							FPO	VL1012	1					
	FRA OFR FPO0010 GP L *	FPO	VL0010	53						FPO	VL0010	51					
		FPO	VL1012							FPO	VL1012	2					
	FRA OFR HOK0010 GP A *	HOK	VL0010	42						HOK	VL0010	39					
		HOK	VL1012							HOK	VL1012	3					
	FRA OFR HOK0010 GP L *	HOK	VL0010	69						HOK	VL0010	65					
		HOK	VL1012							HOK	VL1012	4					
		FRA OFR INA0010 GP	INACTIVE	VL0010	117						INACTIVE	VL0010	108				
		FRA OFR INA1012 GP	INACTIVE	VL1012							INACTIVE	VL1012	9				
Martinique	FRA OFR PGP0010 GP A *	PGP	VL0010	93						PGP	VL0010	93					
		PGP	VL0010	67						PGP	VL0010	66					
		PGP	VL1012							PGP	VL1012	1					
	FRA OFR PS 0010 GP A *	PS	VL0010	8						PS	VL0010	8					
	FRA OFR PS 0010 GP L *	PS	VL0010	8						PS	VL0010	8					
	FRA OFR DFN0010 MQ	DFN	VL0010	69						DFN	VL0010	69					
	FRA OFR FPO0010 MQ	FPO	VL0010	151						FPO	VL0010	151					
	FRA OFR HOK0010 MQ	HOK	VL0010	133						HOK	VL0010	133					
	FRA OFR INA0010 MQ	INACTIVE	VL0010	241						INACTIVE	VL0010	241					
	FRA OFR INA1012 MQ	INACTIVE	VL1012	4						INACTIVE	VL1012	4					
	FRA OFR INA1824 MQ	INACTIVE	VL1824	1						INACTIVE	VL1824	1					
		FPO	VL1218							FPO	VL1218	1					
		FPO	VL1824							FPO	VL1824	1					
La Réunion		HOK	VL1012							HOK	VL1012	10					
	FRA OFR PGP0010 MQ *	HOK	VL1218	244						HOK	VL1218	1					
		PGO	VL0010							PGO	VL0010	25					
		PGP	VL0010							PGP	VL0010	202					
		PGP	VL1012							PGP	VL1012	2					
		PS	VL0010							PS	VL0010	2					
	FRA OFR HOK0010 RE *	HOK	VL0010	157						HOK	VL0010	144					
		HOK	VL1012							HOK	VL1012	3					
		PGO	VL0010							PGO	VL0010	7					
		PGP	VL0010							PGP	VL0010	3					
	FRA OFR HOK1218 RE *	HOK	VL1218	20						HOK	VL1218	16					
	HOK	VL1824							HOK	VL1824	3						
	HOK	VL2440							HOK	VL2440	1						
Mayotte	FRA OFR INA0010 RE	INACTIVE	VL0010	43						INACTIVE	VL0010	43					
	FRA OFR INA1012 RE	INACTIVE	VL1012	2						INACTIVE	VL1012	2					
	FRA OFR INA1824 RE	INACTIVE	VL1824	2						INACTIVE	VL1824	2					
		DFN	VL0010	80						DFN	VL0010	7					
	FRA OFR HOK0010 YT *	HOK	VL0010							HOK	VL0010	71					
		HOK	VL1012							HOK	VL1012	1					
		PGP	VL0010						PGP	VL0010	1						
	FRA OFR INA0010 YT	INACTIVE	VL0010	56						INACTIVE	VL0010	56					
	FRA OFR INA1012 YT	INACTIVE	VL1012	1						INACTIVE	VL1012	1					
	FRA OFR INA40XX YT	INACTIVE	VL40XX	1						INACTIVE	VL40XX	1					
Saint Martin		FPO	VL0010	13						FPO	VL0010	3					
	FRA OFR HOK0010 MF *	HOK	VL0010							HOK	VL0010	7					
		PGP	VL0010							PGP	VL0010	3					
	FRA OFR INA0010 MF	INACTIVE	VL0010	5						INACTIVE	VL0010	5					

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is denoted by the main segment, in terms of number of vessels, in the cluster. In the table, clusters are indicated with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster. Numbers in the SAR indicator refer to the number of SAR stocks caught by the fleet segment.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3. na - not applicable since the SAR20 indicator relates to segments with vessels less than 12m LOA.

Note 4. The SAR 2025 column provides the SAR indicator according to the Commission Guidelines COM(2025) 798 final and was added following an update of the report.

Sources: 2025 DCF Fleet Economic Data Call; Stock assessment results from all relevant Regional Fisheries Organizations where EU fleets have an interest; IFREMER (French national assessments) for stocks in the French Outermost regions; CITES species list; IUCN Red List. *based on provisional data.

Status and trends for the French fleet in all OMRs

Based on the indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, a summary of assessment between fishing opportunities and fishing capacity for fleet segment operating in the French OMRs is provided.

For each of the French OMRs, biological indicators could be estimated for most segments. Only in Saint Martin, for none of the fleet segments, the Sustainable Harvest Indicator (SHI) could be assessed meaningfully. For the fleets where sufficient information was available, a vast majority of the active segments were in balance with respect to the SHI indicator. Only in the OMR fleet of French Guiana, 3 out of 4 assessed segments, showed imbalance with respect to the SHI indicator. None of the fleet segments of Guadeloupe, Martinique, La Réunion and Mayotte showed an imbalance regarding SHI. Regarding the Stocks-at-Risk (SAR) indicator, 2 (4%) fleet segments showed an imbalance of which one fleet segment out of 39 fleet segments comprising vessels of less than 12 m length, and one fleet segment out of 7 fleet segments comprising vessels of more than 12 m length.

The economic indicators characterise a profitable fishery for the OMR fleet segments of Martinique, La Réunion and Mayotte. For these segments, all indicators show an increasing trend. For French Guiana and Guadeloupe, the economic indicators, both CR/BER and ROFTA, show imbalance for about 80% and 50%, of the clustered fleet segments. CR/BER and ROFTA trends suggest a positive trend in almost all segments of French Guiana, Martinique, La Réunion and Mayotte. In Guadeloupe, trends appear to be more variable.

The technical indicators (VUR), show an imbalance for about 64% of the French OMR segments. Applying VUR_{nn}, approximately 54% of the segments were indicated to be out of balance.

Comparison of indicator values

SHI indicator comparisons

The MS provided national assessments for 55 stocks from Guiana, Guadeloupe, Martinique, Mayotte, and Réunion.

A direct comparison between the indicators submitted by France and those calculated by EWG 25-12 showed a very high similarity for the SHI indicator. Five segments showed small deviations that do not affect the balance evaluation. One segment presented the SHI indicator only in the MS report, and other two only in the EWG dataset.

SAR indicator comparisons

In contrast to the 19 fleet segments that target SAR stocks reported by EWG 25-12, France accounts 14.

This is a consequence of the selection of SAR stocks used by the MS, which includes a smaller number of stocks compared with those used by the EWG. In addition, MS takes into account international catches, while the EWG considers only European catches to be consistent with the overall EU calculation.

Following an update of the report, 2 fleet segments were identified to target SAR stocks in accordance with the 2025 Commission Guidelines (COM (2025)). The difference with the 14 fleet segments accounted by France is caused by the different methodology.

Economic indicator comparisons

The comparison between estimated values for EWG and information provided in the French fleet report was carried out for economic indicators RoFTA and CR/BER. The comparison indicates that the two datasets are the same, except for one segment; however, the discrepancy does not affect the evaluation, as it is a minor difference.

The vessel utilization indicator

The MS provided three different datasets; maxseadays, top 10 effort values and 90th percentile and a theoretical maximum is also mentioned for the OMR but it is not provided in the annexes.

The results comparing VUR using the variable “maxseadays” are identical with the only exception of one segment; however, the discrepancy does not affect the evaluation, as it is a minor difference.

The balance report also includes a comparison with the theoretical maximum. Results vary depending on the criteria used.

Assessment of fleet report

The EWG notes where indicators suggest an imbalance but a Member State considers that the fleet segment in question is nevertheless in balance, the Member State provides supporting information. In the case of the French OMR, it can be observed that the indicators calculated by the Member States are consistent with those calculated by the EWG, except for the biological indicators (SAR and SHI) in some fleet segments of Guadeloupe, Martinique, La Réunion and Mayotte.

The methodologies for the calculations and indicators presented are described in the report. The indicator values calculated by France are based on data for the years 2011 – 2023 (where data was available).

The EWG also notes that the segmentation is aligned with the DCF segmentation. In compliance with the DCF, the MS has provided an additional subsegmentation of the OMR fleets of French Guiana and Guadeloupe according to the activity level of the fleet segments.

According to the MS fleet report submitted in 2025, out of a total of 48 active fleet segments presented in the fleet report, 32 segments were considered in balance, and 13 segments were considered imbalanced. The 3 active fleet segments of Saint Martin require additional monitoring in terms of biological and economic data to calculate the balance indicators.

The EWG notes a large increase in availability of stock assessments in the outermost regions, which resulted in an increase in the number of fleet segments for which SHI could be computed.

France provides additional biological indicators, EDI and NOS. MS notes that SHI was used where possible or, in the absence of data to calculate it, used the alternative indicators (i.e. NOS/EDI) and applied the share of overfished species landed by the segment to determine the balance.

The EWG notes that MS calculated various versions of VUR:

- 1) based on the maximum number of days at sea recorded in the individual effort data available per segment;
- 2) based on the average of the 10 highest effort values per segment (defined in the Data Collection Framework);
- 3) based on a proxy corresponding to the 90th percentile (P90) of individual fishing effort;
- 4) based on initial estimates of a theoretical maximum for the overseas territories.

The EWG notes that a methodology of the different versions of VUR and the data to reproduce the results are provided in ANNEX 6 and 8a of the French fleet report.

For those segments with biological (SAR and SHI) and economic indicators (CR/BER and RoFTA) in balance, but with VUR out of balance, the MS point out that the VUR is not representative of a real risk of imbalance due to the many external factors affecting the number of days at sea of vessels, and does not consider such segments to be out of balance. MS provides an explanation related with a wide-range of individual strategies of vessel owner-masters and variable and unpredictable weather conditions.

The MS considered a segment to be imbalanced if its biological, economic and/or, where appropriate, technical indicators are unfavourable for 3 consecutive years or more.

The MS considered that there is a total of 13 segments out of balance, which means that 27% of all active OMR segments are in a situation of imbalance. However, there are several variations between French OMR: In French Guiana, 3 of the 5 active segments are considered out of balance (60%), while in Guadeloupe 8 of 18 active segments are in imbalance (50%). On the other hand, in Mayotte, only 2 of 4 active segments are considered out of balance (44%), and no segments were considered out of balance in La Réunion and Martinique.

The MS also states that the OMR fleet segments of Mayotte should not be subjected to the assessment of balance as there is a lack of EU capacity ceilings to enable this balance to be determined. In December 2024 a cyclone caused catastrophic damages to Mayotte. According to France report much of Mayotte's infrastructure was destroyed, including part of the fishing fleet and the offices of the state departments responsible for sea fisheries.

The SAR indicator is calculated on the basis of the list of SAR stocks used by STECF for its assessment in 2024. However, the list of 'stocks at risk' recognised by the French authorities differs from this list (the differences are explained in MS's report) and the MS proposes a second SAR calculation. The Member State considers that despite the increase in the segment's dependence threshold from 10% to 20% in volume, this indicator remains penalising for fleets, particularly in the French Antilles, which have almost no impact on stock mortality when compared to international landings.

The EWG 25-12 notes that the MS' 2025 fleet report has made progress in terms of data collection for the outermost regions which contributed to increasing the number of the biological balance indicators that could be calculated. Also the MS describes the status of the ongoing data collection and national assessments by each OMR. The EWG notes that the indicators are presented in annexes to the fleet report, as well as a detailed description of the methodology. However, some stock status decision made by MS remains unclear.

Discrepancies in previous fleet reports

In response to previous findings regarding discrepancies in the way the MS assesses the balance between fishing opportunities and capacity of a fleet segment, the MS has adjusted its criteria. Unlike the previous report, the VUR was presented based on the maximum days at sea, as well as other alternative calculation methods.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The EWG 25-12 notes MS fleet report identifies structural overcapacity based on biological, economic, and, for vessels greater than 12 metres, technical indicators. The French fleet report emphasises that the results of the VUR and SAR indicators are undermined by several factors, in particular related to:

- Mixed economic activities and real level of activity during a fishing day of small-scale fleet segments that make the VUR unreliable.
- Very limited contribution in the catches of several SAR stocks by OMR fleet segments making the SAR indicator ineffective. The MS emphasizes that there exists uncertainty concerning the total quantities landed and that international landings should be included.

The grouping of segments into economic clusters did not always allow the real economic balance in segments to be analysed in detail, particularly for minor segments that form part of a cluster.

Subsidies are taken into account by the MS when assessing the balance.

All segments in Martinique, La Réunion, and Mayotte showed positive profitability, and all normal activity (A) segments in Guadeloupe were also profitable. However, Guadeloupe also showed variable profitability depending on the segment.

Overview of action plan

Annex 4 of the 2025 Fleet Report presents the action plan. This plan comprises thirteen segments: six from the Guadeloupe plan, and seven segments from French Guiana and Mayotte. Segments from Réunion, Martinique, and Saint Martin are not included, as these areas were deemed to be in balance.

The following action is specified for all fleet segments identified as being out of balance:

- Ban on any vessels entering the fleet in this fishery, excluding the aid scheme for renewal of the fishing fleet.

For the French Guiana segments, additional measures were included to combat IUU fishing in the case of segments FRA OFR DFN1012 GF A and L, as well as measures to adapt management based on new scientific knowledge and to foster regional cooperation for scientific programmes in the region for FRA OFR DTS1824 GF A.

Regarding the eight segments of Guadeloupe, an additional measure will be implemented to identify the profile of the least active part of this fleet.

Adjustment targets and tools

A description about the previous Action Plan implementation was provided per segment and action in Annex 3 to the fleet report.

The proposed measures in the action plan 2025 to restore the imbalance of fleet segments operating in the outermost regions provide targets and are timebound.

The action plan to restore a sustainable balance between fishing capacity and fishing opportunities in the imbalanced segments include the establishment of capacity ceilings for these segments.

Number of vessels

The action plan submitted by the MS concerns a total of 323 vessels.

5.2.2 Portugal (PT)

Overview of indicator findings

There were 28 fleet segments in the Portuguese OMRs in 2023, of which 18 were active fleet segments. Indicator results are presented below by Supra-region.

Madeira

In the Portuguese North Atlantic fleet, there were 12 fleet segments in 2023, of which 7 were active. Landings data was provided for all 7 active segments and there are no aggregated fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2023 landings in value have been provided aggregated in 7 fleet segments and SHI indicator values were available for 7.

According to the Guidelines, the SHI indicator values for one fleet segment cannot be used meaningfully to assess balance or imbalance, as these values are based on stocks representing less than 40% of the total value of landings for that segment. Therefore, the indicator is only available for six of the seven segments.

In accordance with the Commission guidelines, the EWG notes that the SHI indicator values indicate:

- 0 (0%) fleet segments were **out of balance** with fishing opportunities.
- 6 (100%) fleet segments were **in balance** with fishing opportunities.

Stocks at Risk Indicator (SAR)

SAR indicator was available for all the 7 active fleet segments in 2023

In accordance with the Commission guidelines (COM(2025) 798 final), the EWG notes SAR indicator values indicate:

- 6 (86%) fleet segments were **in balance** with fishing opportunities.
- 114% fleet segments with 1 SAR stock are **out of balance** with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	3	2		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	7			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 7 segments. In accordance with the Commission guidelines, the EWG notes that ROFTA indicator values indicate:

- 5 (71%) segments were *in balance* with fishing opportunities,
- 2 (29%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 4 segments:

- 3 segments displayed an *improving* trend,
- 1 segment displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 7 segments. In accordance with the Commission guidelines, the EWG notes that CR/BR indicator values indicate:

- 5 (71%) segments were *in balance* with fishing opportunities,
- 2 (29%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 4 segments:

- 1 segment displayed an *improving* trend,
- 3 segments displayed a *deteriorating* trend

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for 7 segments. In accordance with the Commission guidelines, the EWG notes that VUR indicator values indicate:

- 6 (86%) segments were *in balance* with fishing opportunities,
- 1 (14%) segment was *out of balance* with fishing opportunities.

Trends could be calculated for 4 segments, 3 segments with a no clear trend and 1 segment displayed a deteriorating trend.

The Inactive Fleet Indicators

In 2023, 5 vessel length classes had inactive vessels (VL0010, VL1012, VL1218, VL1824 and VL2440).

The Madeira inactive fleet accounted for 77% of the total number of vessels, 1.5% of the total GT and 2,6% of the total kW.

No trend could be calculated.

Data on the active and inactive fleet are given in Section 5.1 of this report.

Synthesis of indicators and trends (Madeira)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines is illustrated in Table 5.2.2.1.

Table 5.2.2.1. Status and trends of Balance capacity indicators for the Madeira OMR.

Status

in balance

insufficiently profitable

out of balance

bordeline

insufficient data

					Economic indicators										Biological and technical indicators							
					Status 2023										Status 2023							
OMR	Fleet segment	fishing_tech	vessel_length	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing_tech	vessel_length	N vessels	SAR 2025	SAR ₂₀	SAR	SHI	EDI	VUR	VUR220			
Madeira	PRT NAO HOK0010 P2	HOK	VL0010	53						HOK	VL0010	53		1	1							
	PRT NAO HOK1012 P2	HOK	VL1012	5						HOK	VL1012	5		1	1							
	PRT NAO HOK1218 P2	HOK	VL1218	14						HOK	VL1218	14		na								
	PRT NAO HOK1824 P2	HOK	VL1824	3						HOK	VL1824	3		na								
	PRT NAO HOK2440 P2	HOK	VL2440	6						HOK	VL2440	6	1	na	1							
	PRT NAO INA0010 P2	INACTIVE	VL0010	294						INACTIVE	VL0010	294										
	PRT NAO INA1012 P2	INACTIVE	VL1012	1						INACTIVE	VL1012	1										
	PRT NAO INA1218 P2	INACTIVE	VL1218	4						INACTIVE	VL1218	4										
	PRT NAO INA1824 P2	INACTIVE	VL1824	5						INACTIVE	VL1824	5										
	PRT NAO INA2440 P2	INACTIVE	VL2440	4						INACTIVE	VL2440	4										
	PRT NAO MGP0010 P2	MGP	VL0010	8						MGP	VL0010	8										
	PRT NAO MGP1824 P2	MGP	VL1824	3						MGP	VL1824	3		na								
Total active				92																		
Total inactive				308																		
% inactive to total				77 %																		

					Economic indicators								Biological and technical indicators			
					Trends 2018-2023								Trends 2018-2023			
OMR	Fleet segment	fishing tech	vessel length	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	N vessels	SHI	EDI	VUR	VUR220
Madeira	PRT NAO HOK0010 P2	HOK	VL0010	53						HOK	VL0010	53				
	PRT NAO HOK1012 P2	HOK	VL1012	5						HOK	VL1012	5				
	PRT NAO HOK1218 P2	HOK	VL1218	14						HOK	VL1218	14				
	PRT NAO HOK1824 P2	HOK	VL1824	3						HOK	VL1824	3				
	PRT NAO HOK2440 P2	HOK	VL2440	6						HOK	VL2440	6				
	PRT NAO INA0010 P2	INACTIVE	VL0010	294						INACTIVE	VL0010	294				
	PRT NAO INA1012 P2	INACTIVE	VL1012	1						INACTIVE	VL1012	1				
	PRT NAO INA1218 P2	INACTIVE	VL1218	4						INACTIVE	VL1218	4				
	PRT NAO INA1824 P2	INACTIVE	VL1824	5						INACTIVE	VL1824	5				
	PRT NAO INA2440 P2	INACTIVE	VL2440	4						INACTIVE	VL2440	4				
	PRT NAO MGP0010 P2	MGP	VL0010	8						MGP	VL0010	8				
	PRT NAO MGP1824 P2	MGP	VL1824	3						MGP	VL1824	3				

Trend

improving null/flat trend
deteriorating no clear trend insufficient data

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is indicated in the table with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3. na - not applicable since the SAR20 indicator relates to segments with vessels less than 12m LOA.

Note 4. The SAR 2025 column provides the SAR indicator according to the Commission Guidelines COM(2025) 798 final and was added following an update of the report.

Sources: 2025 DCF Fleet Economic Data Call; Stock assessment results from all relevant Regional Fisheries Organisations where EU fleets have an interest; IFREMER (French national assessments) for stocks in the French Outermost regions; CITES species list; IUCN Red List. *based on provisional data.

Azores

In the Azores fleet, there were 16 fleet segments in 2023, of which 11 were active. Landings data was provided for 9 active segments and there are two aggregated fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2023 landings in value have been provided aggregated in 9 fleet segments and SHI indicator values were available for 8.

According to the Guidelines, the SHI indicator values for 5 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 3 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 62.03% of the total value of the landings in 2023 provided by MS.

In accordance with the Commission guidelines, the EWG notes that the SHI indicator values indicate:

- 0 (0%) fleet segments were **out of balance** with fishing opportunities.
- 3 (100%) fleet segments were **in balance** with fishing opportunities.

Stocks at Risk Indicator (SAR)

SAR indicator was available for all the 9 active fleet segments in 2023.

In accordance with the Commission guidelines (COM(2025) 798 final), the EWG notes SAR indicator values indicate:

- 6 (6%) fleet segments were **in balance** with fishing opportunities.
- 2 (22%) fleet segments with 1 SAR stock are **out of balance** with fishing opportunities.
- 1 (11%) fleet segments with 2 SAR stock are **out of balance** with fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments		6	2	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	6	2		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 9 segments. In accordance with the Commission guidelines, the EWG notes that ROFTA indicator values indicate:

- 8 (89%) segments were *in balance* with fishing opportunities,
- 1 (11%) segment was *out of balance* with fishing opportunities.

Trends could be calculated for 8 segments:

- 4 segments displayed an *improving* trend.
- 4 segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 9 segments.

In accordance with the Commission guidelines, the EWG notes that CR/BR indicator values indicate:

- 7 (78%) segments were *in balance* with fishing opportunities.
- 2 (22%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 8 segments:

- 4 segments displayed an *improving* trend,
- 4 segments displayed a *deteriorating* trend,

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for 11 segments. In accordance with the Commission guidelines, the EWG notes that VUR indicator values indicate:

- 9 (82%) segments were *in balance* with fishing opportunities,
- 2 (18%) segments were *out of balance* with fishing opportunities.

Trends were calculated for nine segments, with all showing no clear trend except one, which showed an *improving* trend.

*The VUR value calculated for an aggregate segment (cluster) is applied to all the fleet segments in the cluster.

The Inactive Fleet Indicators

In 2023, 5 vessel length classes had inactive vessels (VL0010, VL1012, VL1218, VL1824 and VL2440).

The Azores inactive fleet accounted for 29.86% of the total number of vessels, 3.06% of the total GT and 3.62% of the total kW.

No trend could be calculated.

Data on the active and inactive fleet are given in Section 5.1 of this report.

Synthesis of indicators and trends (Azores)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines is illustrated in Table 5.2.2.2.

Table 5.2.2.2. Status and trends of Balance capacity indicators for the Azores OMR.

Status

 in balance	 insufficiently profitable
 out of balance	 borderline
 insufficient data	

					Economic indicators								Biological and technical indicators								
					Status 2023								Status 2023								
OMR	Fleet segment	fishing_tec h	vessel_len gth	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing_t ech	vessel_le ngth	N vessels	SAR 2025	SAR ₂₀	SAR	SHI	EDI	VUR	VUR220		
Azores	PRT NAO DFN0010 P3	DFN	VL0010	26						DFN	VL0010	26									
	PRT NAO HOK0010 P3	HOK	VL0010	309						HOK	VL0010	309		2	2						
	PRT NAO HOK1012 P3	HOK	VL1012	63						HOK	VL1012	63									
	PRT NAO HOK1218 P3	HOK	VL1218	32						HOK	VL1218	32	2	na	2						
	PRT NAO HOK2440 P3	HOK	VL1824	4						HOK	VL1824	4	1	na							
		HOK	VL2440	21						HOK	VL2440	21									
	PRT NAO INA0010 P3	INACTIVE	VL0010	129						INACTIVE	VL0010	129									
	PRT NAO INA1012 P3	INACTIVE	VL1012	23						INACTIVE	VL1012	23									
	PRT NAO INA1218 P3	INACTIVE	VL1218	44						INACTIVE	VL1218	44									
	PRT NAO INA1824 P3	INACTIVE	VL1824	4						INACTIVE	VL1824	4									
	PRT NAO INA2440 P3	INACTIVE	VL2440	6						INACTIVE	VL2440	6									
	PRT NAO PGP0010 P3	PGP	VL0010	5						PGP	VL0010	5									
		PGP	VL1012	1						PGP	VL1012	1									
	PRT NAO PS 0010 P3	PS	VL0010	13							PS	VL0010	13								
	PRT NAO PS 1012 P3	PS	VL1012	7							PS	VL1012	7								
	PRT NAO PS 1218 P3	PS	VL1218	3							PS	VL1218	3		na						
		Total active		484																	
		Total inactive		206																	
		% inactive to total		30 %																	

Trend

 improving	 null/flat trend
 deteriorating	 insufficient data

					Economic indicators								Biological and technical indicators			
					Trends 2019-2023								Trends 2019-2023			
OMR	Fleet segment	fishing tech	vessel length	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	N vessels	SHI	EDI	VUR	VUR220
Azores	PRT NAO DFN0010 P3	DFN	VL0010	26						DFN	VL0010	26				
	PRT NAO HOK0010 P3	HOK	VL0010	309						HOK	VL0010	309				
	PRT NAO HOK1012 P3	HOK	VL1012	63						HOK	VL1012	63				
	PRT NAO HOK1218 P3	HOK	VL1218	32						HOK	VL1218	32				
	PRT NAO HOK2440 P3 *	HOK	VL1824	4						HOK	VL1824	4				
	PRT NAO HOK2440 P3 *	HOK	VL2440	21						HOK	VL2440	21				
	PRT NAO INA0010 P3	INACTIVE	VL0010	129						INACTIVE	VL0010	129				
	PRT NAO INA1012 P3	INACTIVE	VL1012	23						INACTIVE	VL1012	23				
	PRT NAO INA1218 P3	INACTIVE	VL1218	44						INACTIVE	VL1218	44				
	PRT NAO INA1824 P3	INACTIVE	VL1824	4						INACTIVE	VL1824	4				
	PRT NAO INA2440 P3	INACTIVE	VL2440	6						INACTIVE	VL2440	6				
	PRT NAO PGP0010 P3 *	PGP	VL0010	5						PGP	VL0010	5				
	PRT NAO PGP0010 P3 *	PGP	VL1012	1						PGP	VL1012	1				
	PRT NAO PS 0010 P3	PS	VL0010	13						PS	VL0010	13				
	PRT NAO PS 1012 P3	PS	VL1012	7						PS	VL1012	7				
	PRT NAO PS 1218 P3	PS	VL1218	3						PS	VL1218	3				

*Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is denoted by the main segment, in terms of number of vessels, in the cluster. In the table, clusters are indicated with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster. Numbers in the SAR indicator refer to the number of SAR stocks caught by the fleet segment.*

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3. na - not applicable since the SAR20 indicator relates to segments with vessels less than 12m LOA.

Note 4. The SAR 2025 column provides the SAR indicator according to the Commission Guidelines COM(2025) 798 final and was added following an update of the report.

*Sources: 2025 DCF Fleet Economic Data Call; Stock assessment results from all relevant Regional Fisheries Organizations where EU fleets have an interest; IFREMER (French national assessments) for stocks in the French Outermost regions; CITES species list; IUCN Red List. *based on provisional data.*

Status and trends for the Portugal fleet in OMRs

Based on the indicator values for 2023 and trends over 2019-2023 and according to the criteria in the Commission guidelines, a summary of assessment between fishing opportunities and fishing capacity for fleet segment operating in the French OMRs is provided.

For Madeira fleet, biological indicators could be estimated for most segments while for Azores only available for 4 of the 11 segments. For the fleets where sufficient information was available, all active segments were in balance with respect to the SHI indicator.

Regarding the Stocks-at-Risk (SAR) indicator, 14 of the fleet segments showed an imbalance according to the guidelines (COM(2025) 798 final).

Economic indicators reveal sustained profitability across most segments in both OMRs; however, approximately 27% of segments in both regions continue to exhibit weak economic performance.

The technical indicators (VUR), show about 85% of the Portuguese OMR segments are in balance with regard to this indicator.

After analysing the indicators over recent years, no clear trend has been identified for most indicators across the segments of both OMRs

Comparison of indicator values

Indicator values computed by the EWG 25-12 and those in the fleet report submitted by 31 May 2025 are compared below.

The number of active vessels almost matches the data used by the WG and the results presented in the MS report. The reason for this discrepancy is that the data provided by the MS was extracted on 31/12/2024, while the segments reflect the number of active vessels during 2023.

There are two aggregated clusters segments in Azores, for those, the indicators used to estimate biological and technical indicators are submitted at cluster level instead of segment level.

In the Azores, there are two clustered segments for which the variables used to estimate biological and technical performance are submitted at the cluster level instead of the segment level.

SHI indicator comparisons

In the Member State report, SHI values have been presented for the Madeiran and Azores fleets. No information was available for the Azores fleet segment HOK VL1824 because the information is aggregated with segment HOK VL2440.

In its national fleet report the values used for SHI calculation for Madeira and Azores include results of stocks assessed by ICCAT for Tunas, by ICES for Red Seabream (SBR) and six nationally-assessed stocks.

The table below presents the national stock assessments alongside the EWG's evaluation regarding their inclusion in the SHI calculation.

Table 5.2.2.3. Source of F/F_{MSY} values for some species fished in Madeira.

NUMBER	SOURCE (F and F_{MSY})	FAO CODE	NAME IN EN	SCIENTIFIC NAME
10	Novoa-Pabon et al. (2025): Internal report supporting the assessment of biological sustainability indicators under Article 22 of Regulation (EU) No 1380/2013 of the European Parliament and of the Council on the Common Fisheries Policy. MonICO – programme for monitoring coastal resources and habitats in the Azores. GAMPÁ. IMAR/Oceanos, 12 pp. (in annex).	PRR	Parrotfish	<i>Sparisoma cretense</i>
11	Sousa, R., Delgado, J., Pinto, A.R., Henriques, P. (2017). Growth and reproduction of the north-eastern Atlantic keystone species <i>Patella aspera</i> (Mollusca: Patellogastropoda). <i>Helgol Mar Res</i> 71, 8 (2017). (https://doi.org/10.1186/s10152-017-0488-9) (https://hmr.biomedcentral.com/articles/10.1186/s10152-017-0488-9)	LPZ	<i>Patella aspera</i> limpet	<i>Patella aspera</i>
12	Henriques P, Sousa R, Pinto AR, et al. Life history traits of the exploited limpet <i>Patella candei</i> (Mollusca: Patellogastropoda) of the north-eastern Atlantic. <i>Journal of the Marine Biological Association of the United Kingdom</i> . 2012;92(6):1379-1387. doi:10.1017/S0025315411001068. (https://www.cambridge.org/core/journals/journal-of-the-marine-biological-association-of-the-united-kingdom/article/abs/life-history-traits-of-the-exploited-limpet-patella-candei-mollusca-patellogastropoda-of-the-northeastern-atlantic/2782A350DE5ACF22426DD7E89D60E4BA)	LPZ	<i>Patella ordinaria</i> limpet	<i>Patella ordinaria</i>
13	Vasconcelos, J., Sousa, R., Riera, R., Delgado, J., Faria, G., Gordo, L.S. (2018). Stock assessment of the blue jack mackerel, <i>Trachurus picturatus</i> , in the North-eastern Atlantic. <i>Fisheries Management and Ecology</i> ; 25 (4): 233-239. (https://doi.org/10.1111/fme.12289) (https://onlinelibrary.wiley.com/doi/10.1111/fme.12289)	JAA	Blue jack mackerel	<i>Trachurus picturatus</i>
14	Vasconcelos, J., Sousa, R., Riera, R., Delgado, J., Gordo, L.S. (2020). Sustainable Management of Small Pelagic Fisheries: A Case Study of Atlantic Chub Mackerel in Madeira. Regional Secretariat for the Sea and Fisheries, Regional Directorate for the Sea. Report 3. 15pp. (in annex)	VMA	Atlantic chub mackerel	<i>Scomber colias</i>
15	Sousa, R., Ideia, P., Faraia, G., Delgado, J., Freitas, M. (2023). Scabbardfishes fishery at CECAF 34.1.2: A 13 years analysis (2010-2022). Regional Secretariat for the Sea and Fisheries, Regional Directorate for the Sea. Report 1. 18pp. (in annex)	BOX	Scabbardfish	<i>Aphanopus</i> spp.

Source: Own elaborations.

For Madeira, the EWG 25-12 has calculated the indicator for six of the seven segments, all of which are assessed as being in balance. In contrast, the national report provides indicators for all seven segments. In this assessment one segment was found to be out of balance, whereas the corresponding EWG indicator for that segment classified it as in balance.

In the case of the Azores fleet, there are three segments for which both the MS and the EWG 25-12 were able to calculate the indicator, with identical results in two segments and almost identical in the third. In addition, there are two segments for which only the MS could estimate SHI.

Any difference in the SHI values computed by the expert group and those in the Portuguese fleet report could be explained by the different input data used.

SAR indicator comparisons

In the Member State report, SAR values have been presented for the Madeiran and Azores fleets. Biological information of the Azores fleet segment HOK VL1824 is aggregated with segment HOK VL2440.

For Madeira, the MS report provides one SAR for HOK1824 and MGP0010 segments due to BET and two SAR for MGP1824 segment due to VMA and JAC while EWG 25-12 reviewed considered one SAR for HOK2440. .

In the case of the Azores fleet, the MS considered two segments as depending on one SAR stock (BET), whereas the EWG 2512 reviewed identified one segment depending on one SAR and one segment depending on two SAR stocks according to the guidelines (COM(2025) 798 final).

Economic indicator comparisons

In the Portuguese annual fleet report, the CR/BER values have been provided for the reference years 2020-2023 for seven segments in Madeira and nine in Azores. EWG 25-12 estimated the same number of segments for this indicator.

A comparison between indicator values in MS Fleet report and data estimated by EWG 25-12 showed small discrepancies in values, but these differences have no effect on the balance assessment. These discrepancies could be explained by the use of different interest rates when estimating the opportunity cost.

In the Portuguese annual fleet report, the RoFTA -values have been provided for the reference years 2020-2023 for seven segments in Madeira and nine in Azores. EWG 25-12 estimated the same number of segments for this indicator.

A comparison between indicator values in MS Fleet report and data estimated by EWG 25-12 showed small discrepancies in values, but these differences have no effect on the balance assessment except for the Azores PS VL1218 segment, which may be out of balance according to the EWG 25-12 CR/BER and balanced according to the MS report.

The vessel utilization indicator

In the Portuguese annual fleet report the VUR values have been provided for the reference years 2020-2023 for 7 segments in Madeira and 9 segments in Azores. The VUR was based on maximum observed days at sea in each fleet segment. Hence VUR220 is not considered here.

EWG 25-12 notes that the maximum days at sea used in the MS fleet report is different to those used by the EWG.

For Madeira, discrepancies are observed only in the HOK2440 segment. The indicator calculated by the EWG 25-12 shows this segment to be in balance, whereas the indicator calculated by the Member State classifies it as out of balance.

As for Azores the situation is the opposite, there are only two segments whose conclusions coincide with those of the EWG. However, almost 80% of Azores active fleet is in those two segments.

Assessment of fleet report

The fleet report submitted in 2025 provides indicator values separately by fleet segment based on DCF information and for all the main indicators specified in the Commission guidelines (COM (2014) 545). Fleet segments that are assessed by the Member State to be "out of balance" with fishing opportunities are clearly identified in the fleet report. An action

plan for fleet segments assessed by the Member State to be "out of balance" is included in the fleet report.

The MS fleet report indicates that in 2023, 513 OMR vessels (almost 50% of the vessels in the fleet) did not carry out any activity.

The MS reports that the VUR is not the most appropriate indicator for assessing vessel activity and it is not possible to draw reliable conclusions on overcapacity in the fleet using the VUR. Discrepancies have been found for several segments because the variable "maxseadays" in the MS report is not the same as the one for the EWG.

In the fleet report, biological sustainability indicators were calculated adding national assessment for 6 species, 5 of which were not being considered in the EWG 25-12. This may have led to variations in the number of segments assessed and the corresponding balance results.

According to the economic indicators provided by the MS, most fleet segments performed well. However, three segments showed low returns and poor long-term profitability. The EWG detected one additional short-term poor performance, this discrepancy could be explained by the use of a different interest rate.

Based on the combined analysis of vessel utilization, biological sustainability, and economic indicators, the Member State concludes in the Fleet Report that all Azorean and Madeiran segments are in balance, except for the Madeiran MGP VL1824 and HOK VL 2440 segments, for which an action plan has been established.

The EWG notes that where the indicators suggest a situation of imbalance, but a Member State considers that nevertheless the fleet segment in question is in balance, the Member State provides supporting information and/or analyses. The only exception is the SAR indicator for two segments in Madeira, where there is no explanation for the fact that the HOK 0010 and HOK 1012 segments are targeting BET, which is considered SAR by both the EWG and the MS, while these segments are reported as being in balance according to the MS report.

Discrepancies in previous fleet reports

The number of vessels per segment shows discrepancies across the years because the MS provides data for a more recent year compared to the one used for the segments.

Discrepancies have been identified in relation to the SHI indicator, as the Member State (MS) used national stock assessments that were not included in the EWG assessment. These assessments were either conducted prior to 2020 or did not provide a clearly identifiable F/FMSY value.

CR/BER, ROFTA was very similar and VUR showed discrepancies in values.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The fleet report also estimates the economic results of the fleet segments for 2023. Most fleet segments performed well and were indicated to be in balance.

Overview of action plan

An action plan is presented for Madeira set out in the 2024 report on the Portuguese fishing fleet for an adjustment (reduction in capacity) of the fishing fleet MGP VL1824 and HOK VL2440 segments.

For MGP VL1824, the action plan was presented in the 2023 report and remains in force. The plan aims to reduce the seine fleet through the permanent cessation of activity of one of the three vessels in the segment, focusing primarily on older vessels.

The measure started in 2023 and it is planned to complete the decommissioning process by the end of 2025.

For HOK VL2440, a new action plan is presented in the 2024 report. The plan aims to reduce the hook-and-line fleet by permanently ceasing the activity of two of the six vessels in the segment, with priority given to the older vessels. Completion of the plan is expected by the end of 2026.

No action plan is presented for Azores as any fleet segment does not represent a structural imbalance.

EWG 25-12 considers that the measures in the action plan may contribute to reducing the perceived imbalance in the fleet segments concerned.

Adjustment targets and tools

The action plan for Madeira seems targeted to specific out-of-balance fleets and provide clear adjustment targets and tools.

The action plan considers the need to adjust the fleet's capacity, outlines measures for the permanent cessation of activity, and includes a timetable specifying the completion of decommissioning by the end of 2025 for MGP VL1824 and by the end of 2026 for HOK VL2440. The objective of the plan for both segments is a 33% reduction in the number of vessels, which corresponds to one vessel for MGP VL1820 and two vessels for HOK VL2440.

Number of vessels

The action plan submitted by the MS concerns a total of 2 vessels.

5.2.3 Spain (ES)

Overview of indicator findings

There were 16 fleet segments in the Spanish OMRs in 2023, of which 11 were active fleet segments. Indicator results are presented below OMR.

Canary Islands

In the Canary Islands fleet, there were 16 fleet segments in 2023, of which 11 were active. Of the 11 active segments, landings data were provided for 11 segments and economic data for 6 clustered fleet segments. The Canary Islands fleet consisted of 713 vessels, of which 570 (80%) were active and 143 (20%) were inactive.

Sustainable harvest indicator (SHI)

Out of 11 fleet segments active in 2023, SHI indicator values were available for 11.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 5 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 6 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for **52%** of the total value of the landings in 2023 provided by MS in the region, and were as follows:

- 6 (100%) fleet segments were **in balance** with fishing opportunities.

Trends could be calculated for 6 fleet segments:

- 1 (17%) segment displayed **improving** trend,
- 5 (83%) segments displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

According to the criteria in the 2014 Balance Indicator Guidelines, SAR indicator was available for 11 active fleet segments in 2023 of which:

- 7 (63%) fleet segments were **in balance** with fishing opportunities;
- 4 (36%) fleet segments were **out of balance** with fishing opportunities.
2 (18%) fleet segment with 2 stocks-at-risk
2 (18%) fleet segments with 1 stocks-at-risk

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	7			

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	11			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 6 clustered segments:

- 2 (33%) segments were *in balance* with fishing opportunities,
- 4 (67%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 6 segments:

- 2 (33%) segments displayed an *improving* trend,
- 4 (67%) segments displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 6 clustered segments:

- 2 (33%) segments were *in balance* with fishing opportunities,
- 4 (67%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 6 segments:

- 2 (33%) segments displayed an *improving* trend,
- 4 (67%) segments displayed a *deteriorating* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR₂₂₀ is not analysed here.

VUR was calculated for 11 segments:

- 8 (73%) segments were *in balance* with fishing opportunities,
- 3 (27%) segments were *out of balance* with fishing opportunities.

Trends could be calculated for 11 segments:

- 7 (63%) segments displayed *no clear* trend,
- 3 (27%) segments displayed a *null/flat* trend,
- 1 (10%) segment displayed *improving* trend.

The Inactive Fleet Indicators

In 2023, all the vessel length classes had inactive vessels (VL0010, VL1012, VL1218, VL1824 and VL2440).

Inactive vessels accounted for 20% of the total number of vessels in the Canary Islands' fleet, 14% of the total GT and 14% of the total kW.

No trend could be calculated.

Data on the active and inactive fleet are given in Section 5.1 of this report.

Synthesis of indicators and trends (Spanish OMRs)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines is illustrated in Table 5.2.3.1.

Table 5.2.3.1. Balance capacity indicators for Spanish OMR.

Status

■ in balance	■ insufficiently profitable
■ out of balance	■ borderline
	■ insufficient data

					Economic indicators								Biological and technical indicators							
					Status 2023								Status 2023							
OMR	Fleet segment	fishing tech	vessel length	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	N vessels	SAR 2025	SAR20	SAR	SHI	EDI	VUR	VUR ₂₀₀	
Canary Islands	ESP NAO FPO1012 IC *	FPO	VL1012	8						FPO	VL1012	8			1	1				
		FPO	VL1218	5						FPO	VL1218	5								
	ESP NAO HOK1012 IC *	HOK	VL0010	8						HOK	VL0010	8			1	1				
		HOK	VL1012	38						HOK	VL1012	38								
	ESP NAO HOK1218 IC	HOK	VL1218	35						HOK	VL1218	35		1	na	1				
	ESP NAO HOK2440 IC *	HOK	VL1824	7						HOK	VL1824	7		2	na	2				
		HOK	VL2440	15						HOK	VL2440	15		1	na	1				
	ESP NAO PMP0010 IC *	PMP	VL0010	440						PMP	VL0010	440				6	6			
		PMP	VL1012	4						PMP	VL1012	4								
	ESP NAO PS 1218 IC *	PS	VL1012	1						PS	VL1012	1				1	2			
		PS	VL1218	9						PS	VL1218	9		2	na	2				
	ESP NAO INA0010 IC	INACTIVE	VL0010	124						INACTIVE	VL0010	124								
	ESP NAO INA1012 IC *	INACTIVE	VL1012	10						INACTIVE	VL1012	10								
	ESP NAO INA1012 IC *	INACTIVE	VL1218	6						INACTIVE	VL1218	6								
	ESP NAO INA1012 IC *	INACTIVE	VL1824	1						INACTIVE	VL1824	1								
	ESP NAO INA1012 IC *	INACTIVE	VL2440	2						INACTIVE	VL2440	2								
			Total active		570															
			Total inactive		143															
			% inactive to total		20.1															

Trend

■ improving	■ null/flat trend
■ deteriorating	■ no clear trend
	■ insufficient data

					Economic indicators								Biological and technical indicators			
					Trends 2018-2023								Trends 2018-2023			
					CR/BER	RoFTA	ROI	NP margin	NVA/FTE				SHI	EDI	VUR	VUR ₂₂₀
OMR	Fleet segment	fishing tech	vessel length	N vessels						fishing tech	vessel length	N vessels				
Canary Islands	ESP NAO FPO1012 IC *	FPO	VL1012	8						FPO	VL1012	8				
		FPO	VL1218	5						FPO	VL1218	5				
	ESP NAO HOK1012 IC *	HOK	VL0010	8						HOK	VL0010	8				
		HOK	VL1012	38						HOK	VL1012	38				
	ESP NAO HOK1218 IC	HOK	VL1218	35						HOK	VL1218	35				
	ESP NAO HOK2440 IC *	HOK	VL1824	7						HOK	VL1824	7				
		HOK	VL2440	15						HOK	VL2440	15				
	ESP NAO PMP0010 IC *	PMP	VL0010	440						PMP	VL0010	440				
		PMP	VL1012	4						PMP	VL1012	4				
	ESP NAO PS 1218 IC *	PS	VL1012	1						PS	VL1012	1				
		PS	VL1218	9						PS	VL1218	9				
	ESP NAO INA0010 IC	INACTIVE	VL0010	124						INACTIVE	VL0010	124				
	ESP NAO INA1012 IC *	INACTIVE	VL1012	10						INACTIVE	VL1012	10				
	ESP NAO INA1012 IC *	INACTIVE	VL1218	6						INACTIVE	VL1218	6				
	ESP NAO INA1012 IC *	INACTIVE	VL1824	1						INACTIVE	VL1824	1				
	ESP NAO INA1012 IC *	INACTIVE	VL2440	2						INACTIVE	VL2440	2				

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is indicated in the table with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3. na - not applicable since the SAR20 indicator relates to segments with vessels less than 12m LOA.

Note 4. The SAR 2025 column provides the SAR indicator according to the Commission Guidelines COM(2025) 798 final and was added following an update of the report.

*Sources: 2025 DCF Fleet Economic Data Call; Stock assessment results from all relevant Regional Fisheries Organisations where EU fleets have an interest; IFREMER (French national assessments) for stocks in the French Outermost regions; CITES species list; IUCN Red List. *based on provisional data.*

Status and trends for the Spanish fleet in OMRs

Based on the indicator values for 2023 and trends over 2018-2023 and according to the criteria in the Commission guidelines, a summary of assessment between fishing opportunities and fishing capacity for fleet segment operating in the Spanish OMRs is provided.

For all the Canary Islands' fleet segments, the biological indicator SAR could be estimated and showed imbalance. The SHI biological indicator could be estimated for six segments where sufficient information was available, and all of these were in balance.

While the economic indicators characterise a profitable fishery for 4 fleet segments (80% of active vessels)., a decreasing trend in indicator values was observed for 2 of these fleet segments.

The technical indicators (VUR), show an imbalance for about 27% of the Spanish OMR fleet segments.

Comparison of indicator values

A comparison of indicator values computed by the EWG 25-12 and those in the fleet report submitted by the Member State in 2025 are given in Annex II. Points of note for each indicator are listed below.

SHI indicator comparisons

The Spanish fleet report was used to compare the SHI indicator values calculated by the EWG with those in the fleet report. In most cases, the SHI indicator values are the same.

However, the EWG noted one difference between the two sets of calculations. This difference arised from the update of the stock file used by the EWG, regarding the monitored stocks and their status reference values.

These slight differences do not affect the balance status of the SHI, which remained consistent across both datasets.

SAR indicator comparisons

The Spanish fleet report presents the values for SAR for all fleet segments in OMR.

However, differences should be noted for most segments, due to the use of a stock list updated by the WG.

Economic indicator comparisons

The comparison between estimated values for EWG and information provided in the Spanish fleet report was carried out for the economic indicators RoFTA and CR/BER.

EWG notes that the CR/BER and RoFTA values reported in the MS annual fleet report and those estimated in the framework of EWG 25-12 are very similar. The calculations are identical for ROFTA, except for a data entry error in the MS report for one segment. The differences in the CR/BER calculation stem from a discrepancy in the formula relating to whether opportunity cost is used in break-even revenue calculations.

The vessel utilisation indicator

Comparison of the VUR data reported in the MS annual fleet report and those estimated in the framework of EWG revealed discrepancies in indicator values.

Although MS used an alternative approach to measure the ratio between the fleet's maximum potential effort and its actual effort (a method proposed in the guidelines), these differences in calculation do not affect the technical indicator balance.

Assessment of fleet report

The indicator values calculated by Spain are based on data for the years 2019 – 2023. The SHI, SAR, CR/BER, RoFTa have been computed in line with the Commission guidelines COM(2014)545, and the updated with the 2024 guideline for vessels bellow 12m in OMR.

According to the MS report and in line with the EU guidelines, a segment is considered to be out of balance if the economic indicator and/or the biological sustainable harvest indicator (SHI) are unfavourable for three consecutive years or more.

The EWG notes that the MS has assessed 4 segments (NAO FPO1012 IC, NAO FPO1218 IC, NAO HOK1824 IC and NAO HOK2440 IC) as out of balance, based on unfavourable economic indicators over the most recent 5-year period.

Furthermore, Spain considers that the current guidelines do not allow for a proper assessment of the Spanish fleet, which is largely made up of family-owned vessels less than 12 metres in length fishing for a wide variety of species.

Discrepancies in previous fleet reports

There were no significant discrepancies for the biological, the technical and the economic indicators between the STECF assessment of the balance between capacity and fishing opportunities relating to MS's previous fleet report.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

According to this interpretation, structural overcapacity was identified for 7 fleet segments.

The overall economic outlook for the Spanish fishing fleet, based on EWG 25-12 economic indicator values, shows 4 segments that performed well and were found to be balanced (80% of active vessels). 4 segments have been in economic imbalance for at least the last 3 years: NAO HOK1824 IC and NAO HOK2440 IC (for the past 6 years) and 2 new segments, NAO FPO1012 IC and NAO FPO1218.

Overview of action plan

The action plan for 2025–2028 for the 2 new segments identified as out of balance (NAO FPO1012 IC and NAO FPO1218 IC) according to economic indicators, and the action plan for 2023–2025 extended to 2028 for 2 fleet segments (NAO HOK1824 IC and NAO HOK2440 IC*) assessed as out of balance based on economic indicator values, include the following measures aimed at improving their economic performance:

- Mechanism for optimizing the bigeye tuna (*Thunnus obesus*) quota, by allowing quota transfers between authorized vessels.
- Support to cover additional costs of production costs.
- Support to compensate for the additional costs incurred by certain fishery and aquaculture producers in the Canary Islands promoting Canary Islands' fishery products from both industrial and small-scale fisheries on the Canary Islands and elsewhere.

The Spanish plan also includes promotion measures such as the program “Let us enjoy the vast choice of seafood and recipes this country has to offer’.

In addition, one action is mentioned to improve the collection of biological resource data in the outermost regions: Spain continues to collect data from observer networks at ports and auction halls, as well as from onboard observers.

Adjustment targets and tools

The 2023-2025 action plan relating to the 2 segments NAO HOK 1824 IC and NAO HOK 2440*IC, already present in the previous action plan due to their economic imbalance, has been extended until 2028. The 2025-2028 plan now includes 2 new segments that are economically unbalanced: NAO FPO1012 IC and NAO FPO1218 IC.

The objectives of the plan remain the same: increase the value of economic indicators (CR/BER $\geq$ 1 and ROFTA positive and above long-term interest rates (TRP)) by supporting to compensate for the additional costs incurred by certain fishery and aquaculture product operators in the Canary Islands, using the 2021-2027 European Maritime, Fisheries and Aquaculture Fund (EMFAF). For the HOK segments, there is also the measures on quotas transfer for Atlantic Bigeye Tuna.

While the action plan has a clear time-frame (2025-2028), the objectives are not specific or quantifiable and the measures of financial support are not quantified.

Number of vessels

The action plan submitted by the MS concerns a total of 35 vessels.

6. TASK 3 - FLEET SEGMENTS IN THE OUTERMOST REGIONS THAT ARE INDICATED TO BE OUT OF BALANCE

6.1 Introduction

EWG 25-12 was requested to respond to the following ToR:

“3. The Expert group is requested to list for the Outermost Regions of France (Reunion, French Guiana, Martinique, Guadeloupe, Saint-Martin and Mayotte), Portugal (Madeira and Azores) and Spain (Canary Islands), those fleet segments that according to the most updated set of data (2019 or later if available) for either the biological, economic or technical

indicators in the Commission Guidelines 2014 and 2024, as computed by the STECF, were indicated to be out of balance with their fishing opportunities. The list should contain information on the fish stocks on which such segments rely and the fishing area to which such segments are attributed. Separate lists should be provided for each indicator. The fish stocks on which a fleet segment is reliant shall be determined by ranking the landings from all stocks caught by that fleet segment in descending order in terms of landings value and listing those stocks that account for at least 75% of the total value of the landings by that fleet segment. The Expert group is furthermore requested to provide a list of the fleet segments for which information available does not allow to calculate the above indicators and to indicate for which indicators what kind of information was not available.”

Since 2019 (STECF 19-13) MS fleets from the OMRs could be distinguished from their mainland fleets by the introduction of geographical indicator (Geo-indicator) in the DCF fleet economic data call. For Spain and France consistent historical data for OMR regions only can be obtained from 2017 (six years of time series). Furthermore, as explained in the sections below, there are shortages of data and information on the fleets and fisheries in the OMRs.

A note on indicator values and interpretation

Note that in the “traffic light tables” in each Member State section, there are two columns given for the SAR indicator labelled SAR and SAR20. The SAR column lists the values computed according to the method prescribed in the 2014 Commission guidelines (COM(2014) 545). The SAR20 column lists the values computed according to the flexibility introduced in the 2024 Guidelines (COM(2024) 233) for those fleet segments less than 12m in length in the Outermost regions. Following an update of the report, the SAR column has been replaced with SAR2025 values computed in accordance with the 2025 Commission Guidelines (COM(2025) 798).

Similarly, there are two columns for the vessel utilization indicator VUR and VURnn. The VUR column is the utilization ratio for a fleet segment based on the observed average days at sea/max days at sea seadays provided by the Member State. The VURnn column is based on the observed average days at sea / theoretical maximum days at sea provided by the Member State. The theoretical maximum is defined by the Member State in accordance with the flexibilities specified in the 2014 Guidelines for the vessel utilization indicator.

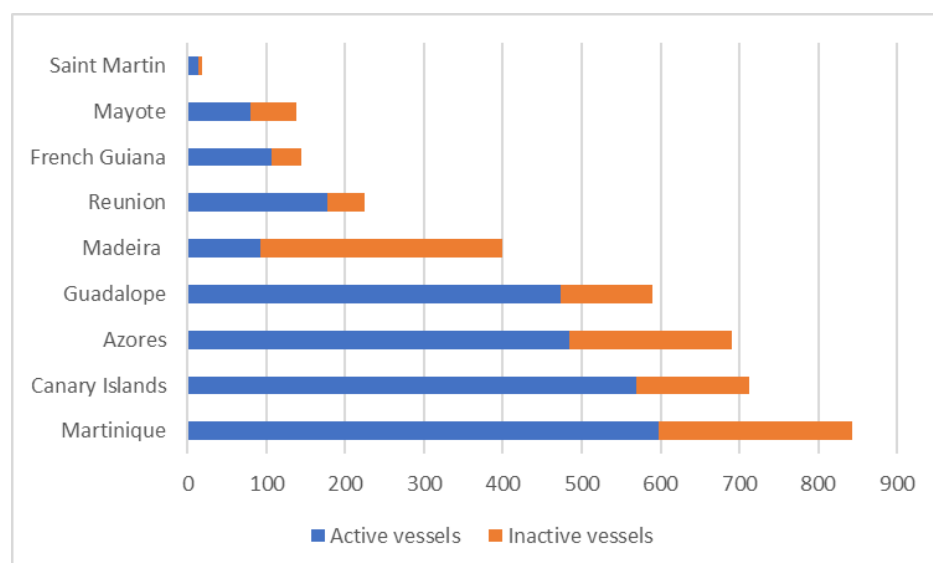
Note that for a given fleet segment, if any one of the indicator values prescribed in the Commission Guidelines indicates an imbalance, then that fleet segment is deemed by the Commission to be out of balance with its fishing opportunities.

The EWG wishes to draw attention to the general considerations on the assessment of balance in Section 2 of this report which refers to previous remarks on the utility of the balance indicators and Commission guidelines. It also outlines specific concerns regarding the SAR indicator and the SHI.

6.2 OMR fleets at a glance

The EU OMR fleet totaled 3 761 vessels in 2023, which 69% refers to active vessels, and 31% inactive vessels. The French OMR fleet was the most numerous, accounting for 52% of all reported vessels. The Portuguese and Spanish fleets represented 29% and 19%, respectively.

Figure 6.2.1. Number of active and inactive vessels in the OMRs.

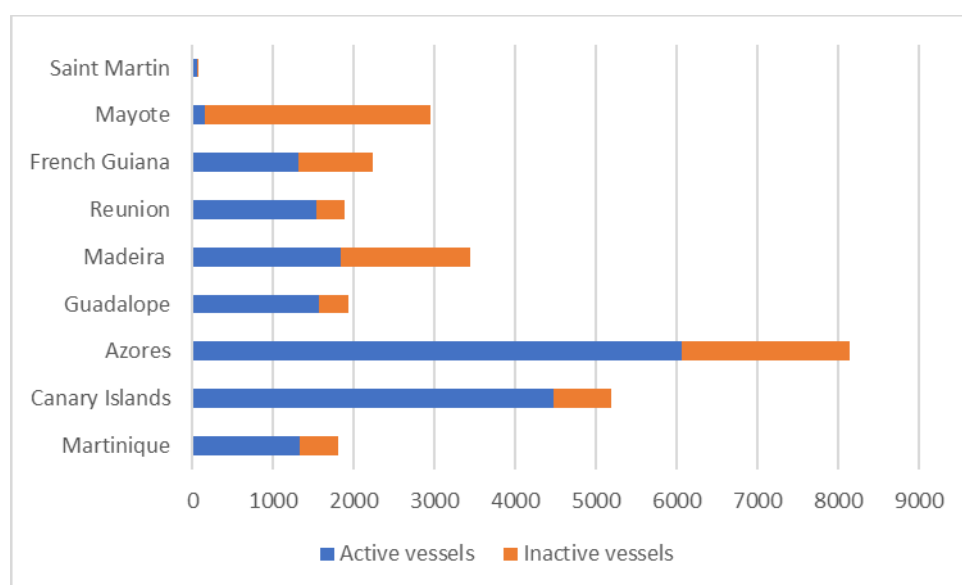


Sources: own elaborations and 2025 DCF Fleet Economic Data Call.

Martinique, with 843 vessels, was the largest OMR fleet (by number), followed by Canary Islands (713), Azores (690), Guadeloupe (590), Madeira (400) La Reunion (224), French Guiana (145) Mayotte (138) and Saint Martin (18).

Guadeloupe is the OMR with the lowest number of inactive vessels (20%), in contrast to Madeira with 77%.

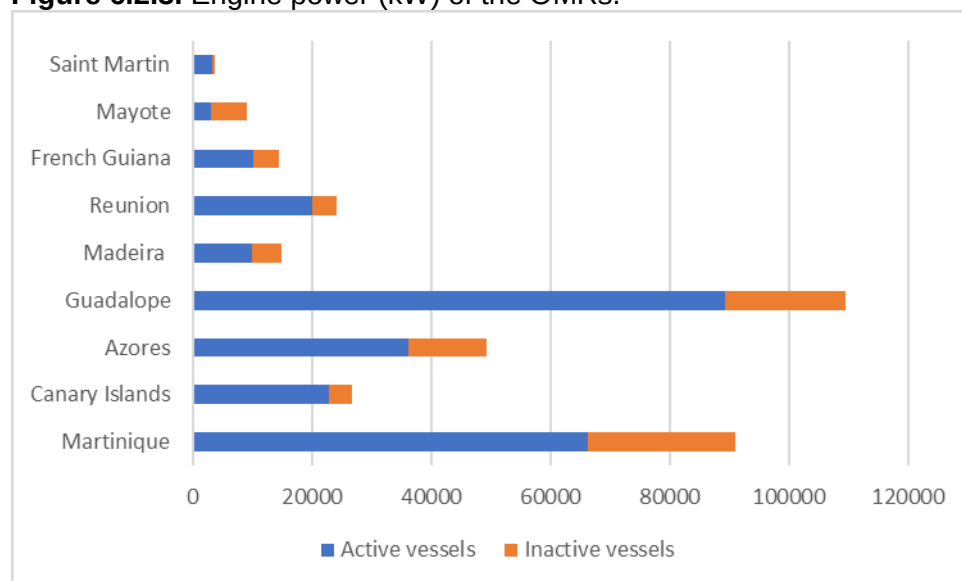
Figure 6.2.2. Gross tonnage (GT) of active and inactive vessels in the OMRs.



Sources: Own elaborations and 2025 DCF Fleet Economic Data Call.

In 2023, on average, 34% of the total OMR fleet Gross Tonnage (GT) belong to inactive vessels. The Canary Islands and Reunion registered 13.7% and 18.2% of the total GT in inactive vessels. In the opposite way, Mayote registered a total of 177 active GT representing 5.3% of the total Mayote fleet, which reveals the small fleet size.

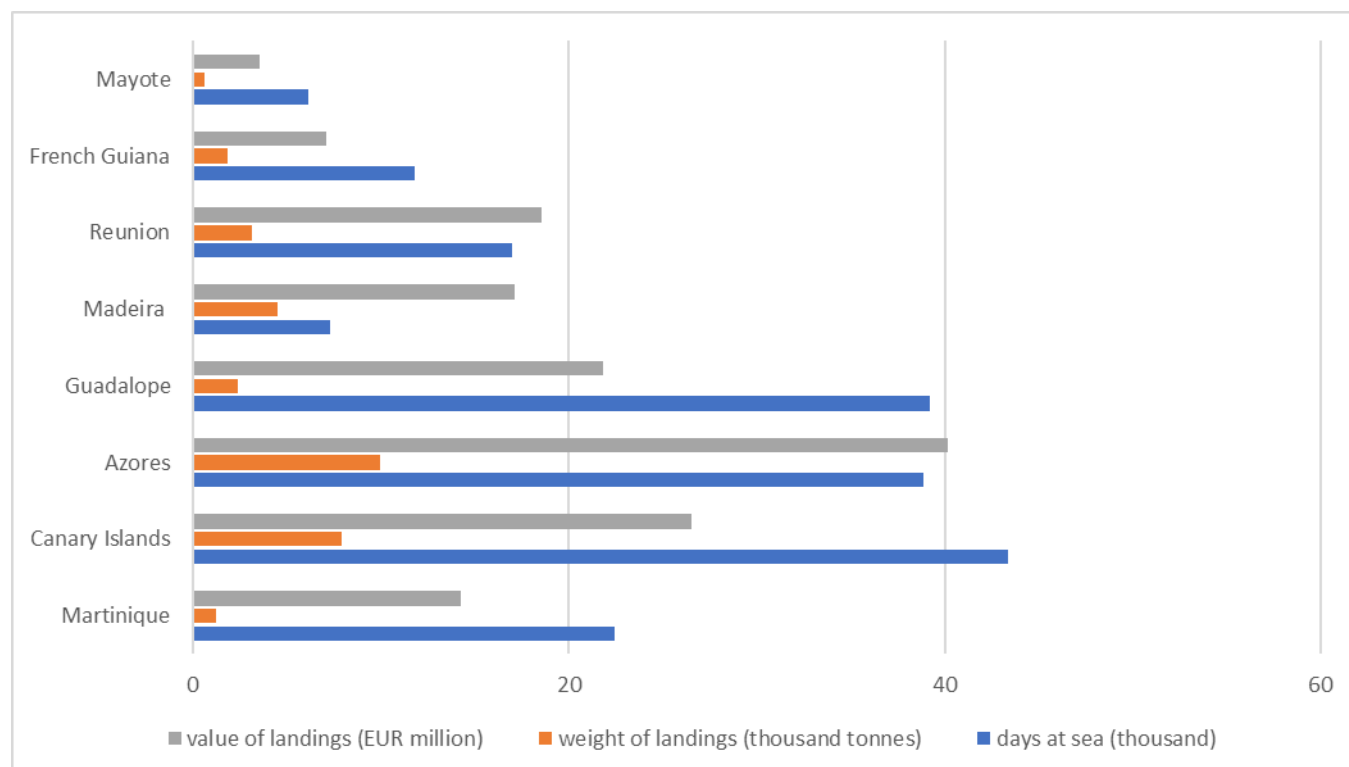
Figure 6.2.3. Engine power (kW) of the OMRs.



Sources: Own elaborations and 2025 DCF Fleet Economic Data Call.

In terms of engine power, it is possible to observe that, on average, approximately 24% of the total engine power belongs to vessels were inactive in 2023. The situation is significantly different from region to region, with Mayotte registering 68% of inactive KW and the Canary Islands 14%.

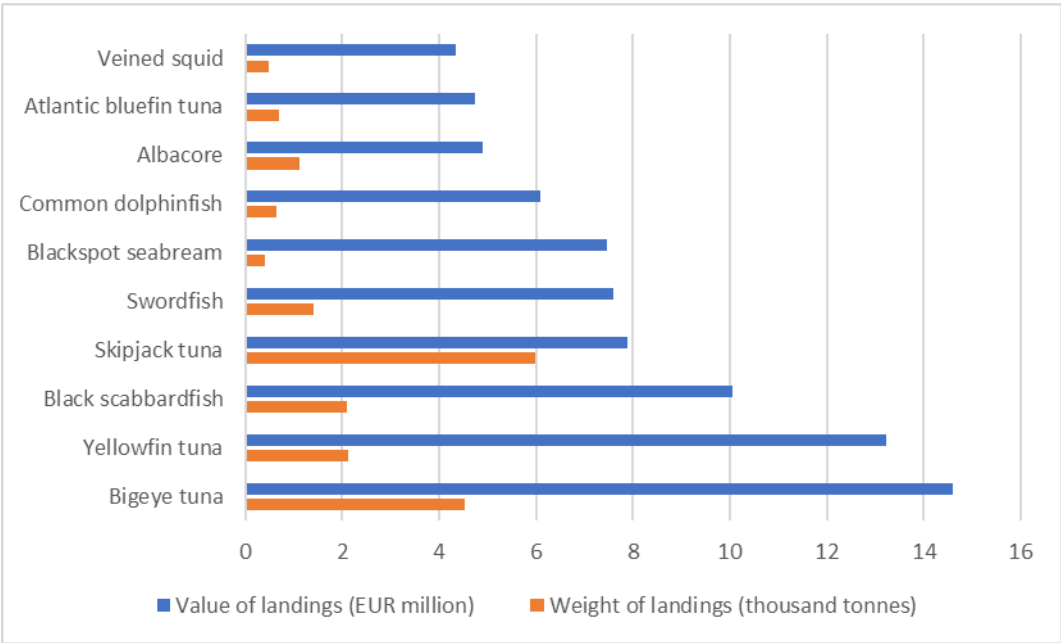
Figure 6.2.4. OMR Effort.



Sources: Own elaborations and 2025 DCF Fleet Economic Data Call.

The OMR fleet spent 186 thousand days at sea in 2023 with an average if of 72 sea days for each active vessel, landing approximately 31.6 thousand tons of seafood, valued in EUR 149 million.

Figure 6.2.5. Most representative species.



Sources: Own elaborations and 2025 DCF Fleet Economic Data Call.

Tuna species represent a significant part of the landings with Bigeye tuna, Yellowfin tuna, Skipjack tuna and Atlantic bluefin tuna, accounting approximately 27% of the total value of outermost regions landings.

The Azores, Canary Islands and Guadeloupe fleets were the most important in terms of landing value (with landed value of 26.9%, 17.8% and 14.6% respectively), followed by Reunion (12.4%), Madeira (11.5%), Martinique (9.5%), French Guiana (4.7%) and Mayotte (2.4%).

The 2025 Annual Economic Report will provide more details on the OMR fleets and their economic performance.

6.3 French Outermost Regions

The data provided for the six French OMRs, uses the geographical indicator to distinguish the OMR fleets and the balance indicators associated with those fleets. The EWG 25-12 was able to compute indicator values for most of the balance indicators and assess their status according to the criteria in COM (2014) 545 and COM (2024) 223 (see Table 5.2.1.1).

Table 6.3.1. List of Fleet Segments in French Outermost Regions and status with respect to available balance indicators computed by the EWG for the year 2023. The status of each indicator is shown with respect to the criteria given in the Commission Guidelines COM (2014) 545, COM (2024) 223 and COM(2025) 798.

in balance
 out of balance
 borderline
 insufficiently profitable
 insufficient data

					Economic indicators								Biological and technical indicators							
					Status 2023								Status 2023							
OMR	Fleet segment	fishing tech	vessel length	N vessels	CRI/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	N vessels	SAR 2025	SAR20	SAR	SHI	EDI	VUR	VURnn	
French Guiana	FRAOFRDN0010 GF A*	DFN	VL0010	19						DFN	VL0010	19		4	4					
	FRAOFRDN0010 GF L*	DFN	VL0010	14						DFN	VL0010	14		2	3					
	FRAOFRDN1012 GF A*	DFN	VL1012	53						DFN	VL1012	53	1	4	4					
	FRAOFRDN1012 GF L*	DFN	VL1012	14						DFN	VL1012	14		1	1					
	FRAOFRDTS1824 GF*	DTS	VL1824	6						DTS	VL1824	6		na						
	FRAOFRINA0010 GF	INACTIVE	VL0010	18						INACTIVE	VL0010	18								
	FRAOFRINA1012 GF	INACTIVE	VL1012	15						INACTIVE	VL1012	15								
	FRAOFRINA1824 GF	INACTIVE	VL1824	6						INACTIVE	VL1824	6								
Guadeloupe	FRAOFRDN0010 GP A*	DFN	VL0010	43						DFN	VL0010	42		1	1					
		PGO	VL0010							PGO	VL0010	1								
	FRAOFRDN0010 GP L*	DFN	VL0010	53						DFN	VL0010	44								
		DFN	VL1012							DFN	VL1012	3								
		PGO	VL0010							PGO	VL0010	6								
	FRAOFRFPO0010 GP A*	FPO	VL0010	37						FPO	VL0010	36		1	1					
		FPO	VL1012							FPO	VL1012	1								
	FRAOFRFPO0010 GP L*	FPO	VL0010	53						FPO	VL0010	51								
		FPO	VL1012							FPO	VL1012	2								
	FRAOFRHOK0010 GP A*	HOK	VL0010	42						HOK	VL0010	39								
		HOK	VL1012							HOK	VL1012	3								
	FRAOFRHOK0010 GP L*	HOK	VL0010	69						HOK	VL0010	65								
		HOK	VL1012							HOK	VL1012	4								
	FRAOFRINA0010 GP	INACTIVE	VL0010	117						INACTIVE	VL0010	108								
	FRAOFRINA1012 GP	INACTIVE	VL1012							INACTIVE	VL1012	9								
	FRAOFRPGP0010 GP A*	PGP	VL0010	93						PGP	VL0010	93		1	1					
FRAOFRPGP0010 GP L*	PGP	VL0010	67						PGP	VL0010	66									
	PGP	VL1012							PGP	VL1012	1									
FRAOFRPS0010 GP A*	PS	VL0010	8						PS	VL0010	8									
FRAOFRPS0010 GP L*	PS	VL0010	8						PS	VL0010	8									
Martinique	FRAOFRDN0010 MQ	DFN	VL0010	69						DFN	VL0010	69								
	FRAOFRFPO0010 MQ	FPO	VL0010	151						FPO	VL0010	151								
	FRAOFRHOK0010 MQ	HOK	VL0010	133						HOK	VL0010	133		1	1					
	FRAOFRINA0010 MQ	INACTIVE	VL0010	241						INACTIVE	VL0010	241								
	FRAOFRINA1012 MQ	INACTIVE	VL1012	4						INACTIVE	VL1012	4								
	FRAOFRINA1824 MQ	INACTIVE	VL1824	1						INACTIVE	VL1824	1								
		FPO	VL1218	244						FPO	VL1218	1		na						
		FPO	VL1824							FPO	VL1824	1		na						
		HOK	VL1012							HOK	VL1012	10		1	1					
		HOK	VL1218							HOK	VL1218	1		na						
		PGO	VL0010							PGO	VL0010	25								
		PGP	VL0010							PGP	VL0010	202								
		PGP	VL1012							PGP	VL1012	2		1	1					
		PS	VL0010							PS	VL0010	2		1	1					
La Réunion	FRAOFRHOK0010 RE*	HOK	VL0010	157						HOK	VL0010	144								
		HOK	VL1012							HOK	VL1012	3		1	1					
		PGO	VL0010							PGO	VL0010	7								
		PGP	VL0010							PGP	VL0010	3								
	FRAOFRHOK1218 RE*	HOK	VL1218	20						HOK	VL1218	16	1	1	1					
		HOK	VL1824							HOK	VL1824	3		na						
		HOK	VL2440							HOK	VL2440	1		na						
	FRAOFRINA0010 RE	INACTIVE	VL0010	43						INACTIVE	VL0010	43								
FRAOFRINA1012 RE	INACTIVE	VL1012	2						INACTIVE	VL1012	2									
FRAOFRINA1824 RE	INACTIVE	VL1824	2						INACTIVE	VL1824	2									
Mayotte	FRAOFRHOK0010 YT*	DFN	VL0010	80						DFN	VL0010	7								
		HOK	VL0010							HOK	VL0010	71		1	1					
		HOK	VL1012							HOK	VL1012	1								
		PGP	VL0010							PGP	VL0010	1								
	FRAOFRINA0010 YT	INACTIVE	VL0010	56						INACTIVE	VL0010	56								
	FRAOFRINA1012 YT	INACTIVE	VL1012	1						INACTIVE	VL1012	1								
FRAOFRINA40XXYT	INACTIVE	VL40XX	1						INACTIVE	VL40XX	1									
Saint Martin	FRAOFRHOK0010 MF*	FPO	VL0010	13						FPO	VL0010	3								
		HOK	VL0010							HOK	VL0010	7								
		PGP	VL0010							PGP	VL0010	3								
	FRAOFRINA0010 MF	INACTIVE	VL0010	5						INACTIVE	VL0010	5								
		Total active		1446																
		Total inactive		512																
		%inactive to total		26.15																

Note 1: Vessel Utilization indicators (VUR and VUR90) were not computed by the EWG although they were provided in the National Fleet Report (see explanation above in section 3.3.1 France; “Comparison of indicator values; The vessel utilization indicator”).

*Note 2: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is denoted by the main segment, in terms of number of vessels, in the cluster. In the table, clusters are indicated with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster. Numbers in the SAR indicator refer to the number of SAR stocks caught by the fleet segment.*

Note 3: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note . na - not applicable since the SAR20 indicator relates to segments with vessels less than 12m LOA.

Note 4. The SAR 2025 column provides the SAR indicator according to the Commission Guidelines COM(2025) 798 final and was added following an update of the report.

Sources: 2025 DCF Fleet Economic Data Call; Stock assessment results from all relevant Regional Fisheries Organisations where EU fleets have an interest; IFREMER (French national assessments) for stocks in the French Outermost regions; CITES species list; IUCN Red List 2025.

According STECF (EWG 25-12) data, 96% of segments provided SAR information for 2022, and 15 segments are out of balance (40% of the total assessed fleet segments).

Like the SAR indicator, VUR and VURnn is available for almost all fleet segments.

Unlike the SAR, SHI and VUR indicators, values for economic indicators are given only for clustered fleet segments and as in the previous reports, Rofta and CR/BER were not available for the FRA OFR DTS1824 GF *.

For French outermost regions VURnn was calculated based on a theoretical maximum number of days at sea, determined by averaging the 90th percentile value for each segment. There is no historical data for this indicator.

Main stocks on which fleet segments rely by region

For each OMR and for those segments that are indicated to be out of balance, a list of the fish stocks on which segments rely are described in the following sub-sections.

In each of the following OMR sections, two sets of data are tabulated:

An upper table, listing for each imbalanced segment, (i) the segment name, (ii) the indicator used to identify the imbalance according to COM (2014) 545 and COM (2024) 223 (iii) the ranked value of the landings of the main species caught by the segment by sea area.

A lower table listing for the SAR indicator (see example below), (i) the species contributing to the perceived imbalance in the segment according to the indicator concerned over the most recent 5 years and for other indicators (ii) the indicator values over the most recent 5 years. No historical data exists for small scale VURnn, so it will not be presented in the present section.

Fleet segment	2018	2019	2020	2021	2022	2023
		yna.wca	yna.wca	yna.wca	yna.wca	yna.wca
DFN VL0010	eet.atl	eet.atl	eet.atl	eet.atl	eet.atl	eet.atl
	awp	awp	awp	awp	awp	awp
	tar	tar	tar	tar	tar	tar

*eet = Atlantic goliath grouper , yna = Acoupa weakfish, awp = Gillbacker Sea Catfish, tar = Tarpon

Stocks at risk denoted by **bold** type and bigger font size, account for more than 20 % of the total value of the landings of all species by the fleet segment
Stocks at risk denoted by normal type, account for more than 10 % but less than 20% of the total value of the landings of all species by the fleet segment

Impact on the FS on the SAR biomass

Dependency of the FS on the SAR

Both thresholds

6.3.1 FRENCH GUIANA

5 segments were studied: FRA OFR DFN0010 GF A*, FRA OFR DFN0010 GF L*, FRA OFR DFN1012 GF A*, FRA OFR DFN1012 GF L*

6.3.1.1 Segment - FRA OFR DFN0010 GF A *

Imbalance indicators

FRA OFR DFN0010 GF A*	CR/BER	RoFTA	SHI

Most representative species in value of landings

Species/area	41.1.1	41.1.1 GF	31	31 GF	Total	%
Acoupa weakfish	499 643 €		82 281 €		581 924 €	53.8
Green weakfish		220 799 €		18 445 €	239 244 €	22.1

SHI

FS	2019	2020	2021	2022	2023
DFN VL0010 A*	0.86	0.90	0.92	0.98	1.03

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	0.79	0.56	1.05	1.72	0.85
Rofta	-22.75	-32.42	11.80	73.79	-11.13

These indicators of economic performance do not consider operation subsidies (fuel and EMFAF compensation plan).

The decrease in economic performance over the period may be partly explained by illegal fishing (INN) of foreign vessel on the same fishing stocks in French Guiana EEZ.

6.3.1.2 Segment - FRA OFR DFN0010 GF L *

Imbalance indicators

FRA OFR DFN0010 GF L*	VURnn

Most representative species in value of landings

Species/area	41.1.1	41.1.1 GF	31	31 GF	Total	%
Acoupa weakfish	148 334 €		24 427 €		172 761 €	27.3
Crucifix sea catfish		86 158 €		32 615 €	118 773 €	18.7
Atlantic goliath grouper	18 021 €		17 553 €		35 574 €	13.9
Snooks(=Robalos) nei	20 756 €		21 170 €		41 926 €	12.1
Tripletail		44 039 €		12 648 €	56 687 €	8.9

6.3.1.3 Segment - FRA OFR DFN1012 GF A *

Imbalance indicators

FRA OFR DFN1012 GF A*	CR/BER	RoFTA	SAR	SHI

Most representative species in value of landings

Species/area	31	41.1.1	41.1.1 GF	31 GF	Total	%
Acoupa weakfish	1 391 134 €	1 035 867 €			2 427 001 €	62.6
Green weakfish			471 489 €	204 252 €	675 741 €	17.5

SAR

Fleet segment	2018	2019	2020	2021	2022	2023
	yna.wca	yna.wca	yna.wca	yna.wca	yna.wca	yna.wca
DFN VL1012 A*	eet.atl tar awp	eet.atl tar awp	eet.atl tar awp		eet.atl tar awp	eet.atl tar awp

*eet = Atlantic goliath grouper , yna = Acoupa weakfish, awp = Gillbacker Sea Catfish, tar = Tarpon

Stocks at risk denoted by **bold** type and bigger font size, account for more than 20 % of the total value of the landings of all species by the fleet segment

Stocks at risk denoted by normal type, account for more than 10 % but less than 20% of the total value of the landings of all species by the fleet segment.

Impact on the FS on the SAR biomass

Dependency of the FS on the SAR

Both thresholds

In 2023 the SAR indicates imbalance for this fleet segment due to the landings of Acoupa weakfish. Acoupa weakfish represents **62.6%** of the total value of the landings.

SHI

FS	2019	2020	2021	2022	2023
DFN VL1012 A*	0.95	0.98	0.98	1.10	1.07

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	1.01	0.87	1.20	1.30	0.95
Rofta	3.99	-5.80	20.43	29.92	-2.14

These indicators of economic performance do not consider operation subsidies (fuel and EMFAF compensation plan).

The decrease in economic performance over the period may be partly explained by illegal fishing (INN) of foreign vessel on the same fishing stocks in French Guiana EEZ.

6.3.1.4 Segment - FRA OFR DFN1012 GF L*

Imbalance indicators

FRA OFR DFN1012 GF L*	CR/BER	RoFTA	VURnn	SHI

Most representative species in value of landings

Species/area	31	41.1.1	41.1.1 GF	31 GF	Total	%
Acoupa weakfish	115 378 €	85 913 €			201 291 €	62.3
Green weakfish			40 244 €	17 434 €	57 678 €	17.8

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	-0.01	0.28	0.24	0.14	0.37
Rofta	-44.00	-31.98	-30.39	-26.15	-36.20

All the economic indicators were under thresholds in 2023, mainly explained by the low activity of this segment (L=Low active vessels). These indicators of economic performance do not consider operation subsidies (fuel and EMFAF compensation plan).

The decrease in economic performance over the period may be partly explained by illegal fishing (INN) of foreign vessels on the same fishing stocks in French Guiana EEZ.

6.3.2 GUADELOUPE

5 imbalanced clusters were studied: FRA OFR DFN0010 GP L*, FRA OFR FPO0010 GP L, FRA OFR HOK0010 GP L*, FRA OFR PGP0010 GP L* and FRA OFR PS 0010 GP L*.

6.3.2.1 Segment - FRA OFR DFN0010 GP L*

Imbalance indicator

FRA OFR DFN0010 GP L*	CR/BER	RoFTA	DFN	VL0010	VURnn
			DFN	VL1012	VURnn
			PGO	VL0010	VURnn

Most representative species in value of landings

Species/area	31 GP	31	Total	%
Parrotfishes nei	239 360 €		239 360 €	32.2
Caribbean spiny lobster		134 066 €	134 066 €	18.0
Halfbeaks nei		107 833 €	107 833 €	14.5
Snappers nei	44 886 €		44 886 €	6.0
Grunts, sweetlips nei	35 780 €		35 780 €	4.8

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	0.22	0.21	0.23	0.45	0.38
Rofta	-21.17	-21.97	-21.96	-15.16	-18.39

All the economic indicators were under thresholds in 2023, mainly explained by the low activity of this segment (L=Low active vessels). These indicators of economic performance do not consider operation subsidies (fuel and EMFAF compensation plan).

Economic performance indicators remained stable throughout the period, reflecting consistently low profitability.

6.3.2.2 Segment FRA OFR FPO0010 GP L*

Imbalance indicators

FRA OFR FPO0010 GP L*	CR/BER	RoFTA	FPO	VL0010	VURnn
			FPO	VL1012	

Most representative species in value of landings

Species/area	31	31 GP	Total	%
Caribbean spiny lobster	167 204 €		167 204 €	25.3
Parrotfishes nei		93 647 €	93 647 €	14.2
Groupers nei		90 437 €	90 437 €	13.7
Snappers nei		61 864 €	61 864 €	9.4
Grunts, sweetlips nei		38 916 €	38 916 €	5.9
Squirrelfishes nei		27 567 €	27 567 €	4.2
Surgeonfishes nei		27 417 €	27 417 €	4.2

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	0.22	0.35	0.28	0.26	0.32
Rofta	-32.83	-21.74	-28.59	-33.66	-22.43

All the economic indicators were under thresholds in 2023, mainly explained by the low activity of this segment (L=Low active vessels). These indicators of economic performance do not consider operation subsidies (fuel and EMFAF compensation plan).

Economic performance indicators remained stable throughout the period, reflecting consistently low profitability.

6.3.2.3 Segment – FRA OFR HOK0010 GP L*

Imbalance indicators

FRA OFR HOK0010 GP L*	CR/BER	RoFTA	HOK	VL0010	VURnn
			HOK	VL1012	

Most representative species in value of landings

Species/area	31	31 GP	Total	%
Common dolphinfish	491 079 €		491 079 €	34.2
Yellowfin tuna	301 746 €		301 746 €	21.0
Groupers nei		199 456 €	199 456 €	13.9
Filefishes, leatherjackets nei	78 825 €		78 825 €	5.5
Wahoo	74 455 €		74 455 €	5.2

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	0.47	0.39	0.55	0.53	0.51
Rofta	-10.50	-13.02	-9.01	-9.79	-9.50

All the economic indicators were under thresholds in 2023, mainly explained by the low activity of this segment (L=Low active vessels). These indicators of economic performance do not consider operation subsidies (fuel and EMFAF compensation plan).

Economic performance indicators remained stable throughout the period, reflecting consistently low profitability.

6.3.2.4 Segment - FRA OFR PGP0010 GP L*

Imbalance indicators

FRA OFR PGP0010 GP L*	CR/BER	RoFTA	PGP	VL0010	VURnn
			PGP	VL1012	VURnn

Most representative species in value of landings

Species/área	31	31 GP	Total	%
Common dolphinfish	212 103 €		212 103 €	20.8
Yellowfin tuna	125 165 €		125 165 €	12.3
Parrotfishes nei		121 799 €	121 799 €	11.9
Caribbean spiny lobster	114 897 €		114 897 €	11.3
Conch shells nei	80 492 €		80 492 €	7.9
Groupers nei		45 444 €	45 444 €	4.5
Filefishes, leatherjackets nei	33 544 €		33 544 €	3.3
Snappers nei		33 537 €	33 537 €	3.3

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	0.30	0.39	0.31	0.27	0.31
Rofta	-24.31	-21.86	-24.38	-24.71	-20.92

All the economic indicators were under thresholds in 2023, mainly explained by the low activity of this segment (L=Low active vessels). These indicators of economic performance do not consider operation subsidies (fuel and EMFAF compensation plan).

Economic performance indicators remained stable throughout the period, reflecting consistently low profitability.

6.3.2.5 Segment – FRA OFR PS 0010 GP L*

Imbalance indicators

FRA OFR PS 0010 GP L*	CR/BER	RoFTA	VURnn

Most representative species in value of landings

Species/area	31 GP	31	Total	%
Yellowtail snapper	28 217 €		28 217 €	41.3
Grunts, sweetlips nei	11 494 €		11 494 €	16.8
Parrotfishes nei	7 865 €		7 865 €	11.5
Carangids nei		6 028 €	6 028 €	8.8

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	0.57	0.68	0.64	0.49	0.19
Rofta	-12.99	-10.08	-10.30	-16.27	-29.34

All the economic indicators were under thresholds in 2023, mainly explained by the low activity of this segment (L=Low active vessels). These indicators of economic performance do not consider operation subsidies (fuel and EMFAF compensation plan).

6.3.3 MARTINIQUE

4 imbalance clusters were studied: FRA OFR HOK0010 MQ and FRA OFR PGP0010 MQ *.

6.3.3.1 Segment - FRA-OFR-DFN0010-MQ

FRA OFR DFN0010 MQ	VURnn

Most representative species in value of landings

Species/area	31 MQ	31	Total	%
Halfbeaks nei	262 166 €		262 166 €	34.4
Carangids nei		114 479 €	114 479 €	15.0
Parrotfishes nei	96 311 €		96 311 €	12.6
Grunts, sweetlips nei		53 632 €	53 632 €	7.0
Snappers nei	39 593 €		39 593 €	5.2
Bigeye scad	39 070 €		39 070 €	5.1

6.3.3.2 Segment - FRA-OFR-FPO0010-MQ

FRA OFR FPO0010 MQ	VURnn

Most representative species in value of landings

Species/area	31 MQ	31	Total	%
Caribbean spiny lobster	291 138 €		291 138 €	23.9
Snappers nei	183 480 €		183 480 €	15.1
Parrotfishes nei	155 828 €		155 828 €	12.8
Red lionfish		63 192 €	63 192 €	5.2

Spiny lobsters nei		62 062 €	62 062 €	5.1
Yellowtail snapper	56 996 €		56 996 €	4.7
Carangids nei		49 659 €	49 659 €	4.1
Conch shells nei		47 670 €	47 670 €	3.9
Squirrelfishes nei	42 922 €		42 922 €	3.5

6.3.3.3 Segment - FRA-OFR-HOK0010-MQ

Imbalance indicators

FRA OFR HOK0010 MQ	VURnn

Most representative species in value of landings

Species/area	31	31 MQ	Total	%
Yellowfin tuna	1 163 358 €		1 163 358 €	36.5
Blue marlin	654 209 €		654 209 €	20.6
Common dolphinfish	604 862 €		604 862 €	19.0

Segment - FRA-OFR-PGP0010-MQ-*

Imbalance indicators – VURnn

FRA OFR PGP0010 MQ *	FPO	VL1218	VURnn
	HOK	VL1218	VURnn
	PGO	VL0010	VURnn
	PGP	VL0010	VURnn
	PGP	VL1012	VURnn

Most representative species in value of landings

Species/area	31	31 MQ	Total	%
Yellowfin tuna	2 355 543 €		2 355 543 €	26.0
Blue marlin	1 197 528 €		1 197 528 €	13.2
Common dolphinfish	944 129 €		944 129 €	10.4
Carangids nei	909 159 €		909 159 €	10.0
Halfbeaks nei		546 120 €	546 120 €	6.0
Caribbean spiny lobster		438 089 €	438 089 €	4.8
Parrotfishes nei		376 473 €	376 473 €	4.2
Snappers nei		350 462 €	350 462 €	3.9

6.3.4 REUNION

2 imbalanced clusters were studied: FRA OFR HOK0010 RE A* and FRA OFR HOK1218 RE A*.

6.3.4.1 Segment - FRA OFR HOK0010 RE *

Imbalance indicators

FRA OFR HOK0010 RE *	HOK	VL1012	VURnn
	PGO	VL0010	VURnn
	PGP	VL0010	VURnn

Most representative species in value of landings

Species/area	51.7	51.6	51.7 RE	Total	%
Yellowfin tuna	2 255 147 €	40 295 €		2 295 442 €	32.4
Swordfish	1 095 334 €	27 015 €		1 122 349 €	15.8
Albacore	807 593 €	12 150 €		819 743 €	11.6
Common dolphinfish	760 979 €	3 447 €		764 426 €	10.7
Blue marlin	675 305 €	5 727 €		681 032 €	9.6

6.3.4.2 Segment - FRA OFR HOK1218 RE*

Imbalance indicators

FRA OFR HOK1218 RE *	HOK	VL1218	SAR

Most representative species in value of landings

Species/area	51.6	51.7	51.8	Total	%
Swordfish	4 111 869 €	1 035 948 €	66 363 €	5 214 180 €	45.5
Yellowfin tuna	1 678 830 €	656 268 €	18 231 €	2 353 329 €	20.6
Albacore	1 247 980 €	536 134 €	2 141 €	1 786 255 €	15.6

SAR - Stocks at Risk

FS	2018	2019	2020	2021	2022	2023
HOK VL1218	bum.iotc	bum.iotc	bum.iotc	bum.iotc	bum.iotc	bum.iotc
	yft.iotc	yft.iotc	yft.iotc	yft.iotc	yft.iotc	
HOK VL1824	yft.iotc	yft.iotc	yft.iotc	yft.iotc	yft.iotc	

*bum.iotc = Blue marlin iotc area, yft = Yellowfin tuna

	Impact on the FS on the SAR biomass
	Dependency of the FS on the SAR
	Both thresholds

In 2023 SAR indicates imbalance for this fleet segment due to catches of Blue Marlin (7.6% for HOK VL1218).

6.3.5 MAYOTTE

The fleet in this region comprises 1 clustered segment, which were assessed to be out of balance according to at least one balance indicator

6.3.5.1 Segment - FRA-OFR-HOK0010-YT-*

Imbalance indicators

FRA OFR HOK0010 YT *	HOK	VL0010	SHI	VURnn

Most representative species in value of landings

Species/area	51.6	51.6 YT	Total	%
Yellowfin tuna	1 006 959 €		1 006 959 €	28.1
Scads nei	300 775 €		300 775 €	8.4
Green jobfish		245 603 €	245 603 €	6.9
Needlefishes, etc. nei	205 677 €		205 677 €	5.7
Swordfish	161 056 €		161 056 €	4.5
Giant trevally		127 660 €	127 660 €	3.6
Deep-water red snapper	86 710 €		86 710 €	2.4
Bluefin trevally	83 448 €		83 448 €	2.3
Skipjack tuna	81 311 €		81 311 €	2.3
Parrotfishes nei	74 073 €		74 073 €	2.1
Snappers nei	69 617 €		69 617 €	1.9

Mangrove red snapper	67 133 €		67 133 €	1.9
Rusty jobfish		62 562 €	62 562 €	1.7
Wahoo	54 697 €		54 697 €	1.5
Bigeye tuna	52 531 €		52 531 €	1.5
Spotcheek emperor	50 847 €		50 847 €	1.4

SHI

FS	2018	2019	2020	2021	2022
HOK VL0010	0,88	0,99	1,05	1,08	1,10

6.4 Portuguese Outermost Regions

The data provided for the two Portuguese OMRs, Azores and Madeira, uses the geographical indicator to distinguish the OMR fleets and the balance indicators associated with those fleets. The EWG 25-12 was able to compute indicator values for most of the balance indicators and assess their status according to the criteria in COM (2014) 545, COM (2024) 223 and COM(2025) 798 (see Tables 5.2.2.1 & 5.2.2.2).

Table 6.4.1. List of Fleet Segments indicators in Portuguese Outermost Regions in 2023.

■ in balance
 ■ out of balance
 ■ borderline
 ■ insufficiently profitable
 ■ insufficient data

					Economic indicators								Biological and technical indicators							
					Status 2023								Status 2023							
OMR	Fleet segment	fishing_tec h	vessel_len gth	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing_tech	vessel_length	N vessels	SAR 2025	SAR ₂₀	SAR	SHI	EDI	VUR	VUR220	
Madeira	PRT NAO HOK0010 P2	HOK	VL0010	53						HOK	VL0010	53		1	1					
	PRT NAO HOK1012 P2	HOK	VL1012	5						HOK	VL1012	5		1	1					
	PRT NAO HOK1218 P2	HOK	VL1218	14						HOK	VL1218	14		na						
	PRT NAO HOK1824 P2	HOK	VL1824	3						HOK	VL1824	3		na						
	PRT NAO HOK2440 P2	HOK	VL2440	6						HOK	VL2440	6	1	na	1					
	PRT NAO MGP0010 P2	MGP	VL0010	8						MGP	VL0010	8								
Azores	PRT NAO MGP1824 P2	MGP	VL1824	3						MGP	VL1824	3								
	PRT NAO DFN0010 P3	DFN	VL0010	26						DFN	VL0010	26								
	PRT NAO HOK0010 P3	HOK	VL0010	309						HOK	VL0010	309		2	2					
	PRT NAO HOK1012 P3	HOK	VL1012	63						HOK	VL1012	63								
	PRT NAO HOK1218 P3	HOK	VL1218	32						HOK	VL1218	32	2	na	2					
	PRT NAO HOK1824 P3	HOK	VL1824	4						HOK	VL1824	4								
	PRT NAO HOK2440 P3 *	HOK	VL2440	21						HOK	VL2440	21	1	na	1					
	PRT NAO PGP0010 P3 *	PGP	VL0010	5						PGP	VL0010	5								
	PRT NAO PGP1012 P3	PGP	VL1012	1						PGP	VL1012	1								
	PRT NAO PS 0010 P3	PS	VL0010	13						PS	VL0010	13								
	PRT NAO PS 1012 P3	PS	VL1012	7						PS	VL1012	7								
	PRT NAO PS 1218 P3	PS	VL1218	3						PS	VL1218	3		na						

*Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is indicated in the table with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster.*

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note . na - not applicable since the SAR20 indicator relates to segments with vessels less than 12m LOA.

Note 3. The SAR 2025 column provides the SAR indicator according to the Commission Guidelines COM(2025) 798 final and was added following an update of the report.

Sources: 2025 DCF Fleet Economic Data Call; Stock assessment results from all relevant Regional Fisheries Organisations where EU fleets have an interest; IFREMER (French national assessments) for stocks in the French Outermost regions; CITES species list; IUCN Red List 2025

The Portuguese OMR fleet is composed by 18 fleet segments (16 clustered). SHI information was available for 10 fleet segments. For the economic and technical indicators, the MS provides information for all fleet segments.

Main stocks on which fleet segments rely by region

For each OMR and for those segments that are indicated to be out of balance, a list of the fish stocks on which segments rely are described in the following sub-sections.

In each of the following OMR sections, two sets of data are tabulated:

An upper table, listing for each imbalanced segment, (i) the segment name, (ii) the indicator used to identify the imbalance according to COM (2014) 545 and COM (2024) 223 (iii) the ranked value of the landings of the main species caught by the segment by sea area.

A lower table listing for the SAR indicator, (i) the species contributing to the perceived imbalance in the segment according to the indicator concerned over the most recent 5 years and for other indicators (ii) the indicator values over the most recent 5 years.

6.4.1 AZORES

6 imbalanced clusters were identified, PRT NAO HOK0010 P3, PRT NAO HOK1012 P3, PRT NAO HOK1218 P3, PRT NAO HOK1824 P3, PRT NAO HOK2440 P3 * and PRT NAO PS 1218 P3.

6.4.1.1 Segment - PRT NAO HOK0010 P3

Imbalance indicators

PRT NAO HOK0010 P2	VUR

Most representative species in value of landings

Species/area	27.10.a	%
Blackspot seabream	4 083 002 €	32.2
Veined squid	1 818 447 €	14.4
Red porgy	934 989 €	7.4
Alfonsino	869 079 €	6.9
Wreckfish	572 132 €	4.5
Forkbeard	520 242 €	4.1
Red scorpionfish	402 078 €	3.2
Greater amberjack	291 338 €	2.3

Historical VUR indicators for the last five years

VUR	2019	2020	2021	2022	2023
HOK VL0010	0.30	0.32	0.33	0.33	0.33

6.4.1.2 Segment - PRT NAO HOK1012 P3

Imbalance indicators

PRT NAO HOK1012 P2	VUR

Most representative species in value of landings

Species/area	27.10.a	%
Blackspot seabream	2 124 388 €	25.2
Veined squid	1 510 710 €	17.9
Bigeeye tuna	671 978 €	8.0
Alfonsino	501 793 €	6.0
Blackbelly rosefish	476 931 €	5.7
Forkbeard	420 559 €	5.0
Skipjack tuna	275 602 €	3.3
Yellowfin tuna	274 612 €	3.3
Wreckfish	268 190 €	3.2

Historical VUR indicators for the last five years

VUR	2019	2020	2021	2022	2023
HOK VL1012	0.66	0.66	0.61	0.60	0.61

6.4.1.3 Segment - PRT NAO HOK1218 P3

Imbalance indicators

PRT NAO HOK1218 P3	SAR

Most representative species in value of landings

Species/area	27.10.a	34.1.2	Total	%
Bigeye tuna	1 511 604 €	1 445 €	1 513 049 €	21.9
Veined squid	967 105 €		967 105 €	14.0
Blackspot seabream	882 492 €		882 492 €	12.8
Skipjack tuna	855 276 €		855 276 €	12.4
Alfonsino	391 539 €		391 539 €	5.7
Blackbelly rosefish	307 088 €		307 088 €	4.5
Yellowfin tuna	283 907 €		283 907 €	4.1

SAR - Stocks at Risk

Fleet segment	2018	2019	2020	2021	2022	2023
HOK VL1218				bet.world	bet.world	bet.world
						ory.nea

*bet.world = Bigeye tuna, ory = Orange Roughy

Stocks at risk denoted by **bold** type and bigger font size, account for more than 20 % of the total value of the landings of all species by the fleet segment

Stocks at risk denoted by normal type, account for more than 10 % but less than 20% of the total value of the landings of all species by the fleet segment.

Impact on the FS on the SAR biomass

Dependency of the FS on the SAR

Both thresholds

In 2023 SAR indicates imbalance for this fleet segment due to catches of **21.9%** Bigeye tuna of the total landing value of the fleet segment. Orange Roughy catches are minimal, valued at €20.

6.4.1.4 Segment - PRT NAO HOK2440 P3*

Imbalance indicators

PRT NAO HOK2440 P3 *	BER	ROFTA	HOK	VL1824	
			HOK	VL2440	SAR

Most representative species in value of landings

Species/area	27.10.a	34.1.2	27.7.j	27.8.a	Total	%
Bigeye tuna	2 545 699 €	1 176 774 €			3 722 473 €	38.9
Skipjack tuna	2 439 425 €	302 372 €			2 741 797 €	28.6
Blue shark	443 133 €		207 961 €	97 523 €	748 617 €	7.8

SAR - Stocks at Risk

Fleet segment	2018	2019	2020	2021	2022	2023
HOK VL2440				bet.world	bet.world	bet.world

* bet.world = Bigeye tuna

Stocks at risk denoted by **bold** type and bigger font size, account for more than 20 % of the total value of the landings of all species by the fleet segment
Stocks at risk denoted by normal type, account for more than 10 % but less than 20% of the total value of the landings of all species by the fleet segment.

	Impact on the FS on the SAR biomass
	Dependency of the FS on the SAR
	Both thresholds

In 2023 SAR indicates imbalance for this fleet segment due to catches of Bigeye tuna which represents **38.9%** of the total landing value of the fleet segment.

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	0.96	0.44	0.82	0.50	0.13
Rofta	2.76	-9.61	-0.53	-6.99	-15.53

All the economic indicators were under thresholds in 2023. These indicators of economic performance do not consider operation subsidies, especially EMFAF compensation plan which are important in Azores.

Economic performance indicators deteriorated over the period with a drop in CR/BER and Rofta since 2020 with a slightly recovery in 2021.

6.4.1.5 Segment - PRT NAO PS1218 P3

Imbalance indicators

PRT NAO PS 1218 P3	CR/BER

Most representative species in value of landings

Species/area	27.10.a	%
Blue jack mackerel	136 437 €	77.7

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
RoFTA	4.11	2.32	1.46	0.83	0.93

All the economic indicators were under thresholds in 2023. These indicators of economic performance do not consider operation subsidies, especially EMFAF compensation plan which are important in Azores.

6.4.2 MADEIRA

The fleet in this region comprises 7 segments, 4 of which were assessed to be out of balance according to at least one balance indicator: PRT NAO HOK0010 P2 *, PRT NAO HOK1012 P2, PRT NAO HOK2440 P2 and PRT NAO MGP1824 P2.

6.4.2.1 Segment - PRT NAO HOK0010 P2 *

Imbalance indicators

PRT NAO HOK0010 P2	VUR

Most representative species in value of landings

Species/area	34.1.2	%
Bigeye tuna	684 448 €	28.1
Black scabbardfish	492 953 €	20.2
Pink dentex	455 939 €	18.7
Atlantic bluefin tuna	355 335 €	14.6

Historical VUR indicators for the last five years

VUR	2019	2020	2021	2022	2023
HOK VL0010	0.77	0.71	0.82	0.42	0.47

6.4.2.2 Segment - PRT NAO HOK2440 P2

Imbalance indicators

PRT NAO HOK2440 P2	CR/BER	RoFTA	SAR

Most representative species in value of landings

Species/area	34.1.2	27.10.a	Total	%
Skipjack tuna	665 183 €	426 282 €	1 091 465 €	56.8
Bigeye tuna	606 734 €	85 115 €	691 849 €	36.0

SAR - Stocks at Risk

Fleet segment	2018	2019	2020	2021	2022	2023
HOK VL2440				bet.world	bet.world	bet.world

*mls = Striped marlin, msl = South American rock mussel, bet.world = Bigeye tuna

Stocks at risk denoted by **bold** type and bigger font size, account for more than 20 % of the total value of the landings of all species by the fleet segment

Stocks at risk denoted by normal type, account for more than 10 % but less than 20% of the total value of the landings of all species by the fleet segment.

	Impact on the FS on the SAR biomass
	Dependency of the FS on the SAR
	Both thresholds

In 2023 SAR indicates imbalance for this fleet segment due to catches of Bigeye tuna which represents **36.0%** of the total landing value of the fleet segment.

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	1.08	0.03	0.21	-0.29	-0.01
Rofta	5.72	-15.78	-16.33	-48.68	-20.63

All the economic indicators were under thresholds in 2023. These indicators of economic performance do not consider operation subsidies, especially EMFAF compensation plan which are important in Madeira.

6.4.2.3 Segment - PRT NAO MGP1824 P2 *

Imbalance indicators – CR/BER, Rofta

Most representative species in value of landings

Species/area	34.1.2	%
Blue jack mackerel	285 341 €	56.8
Atlantic chub mackerel	204 133 €	40.7

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	0.41	0.54	0.56	0.08	0.38
Rofta	-11.99	-10.23	-10.32	-16.41	-13.73

All the economic indicators were under thresholds in 2023. These indicators of economic performance do not consider operation subsidies, especially EMFAF compensation plan which are important in Madeira.

6.5 Spanish Outermost Regions

The data provided for the Spanish OMR, Canary Islands, uses the geographical indicator to distinguish the OMR fleets and the balance indicators associated with those fleets. (Table 5.2.3.1).

Table 6.5.1. List of Fleet Cluster Segments Indicators in Canary Islands. Out of balance. Status is expressed according to the criteria in COM (2014) 545, COM (224) 223 and COM(2025) 798.

■ in balance
 ■ out of balance
 ■ borderline
 ■ insufficiently profitable
 ■ insufficient data

					Economic indicators								Biological and technical indicators							
					Status 2023								Status 2023							
OMR	Fleet segment	fishing tech	vessel length	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	fishing tech	vessel length	N vessels	SAR 2025	SAR20	SAR	SHI	EDI	VUR	VUR ₂₀₀	
Canary Islands	ESP NAO FPO1012	FPO	VL1012	8						FPO	VL1012	8		1	1					
		FPO	VL1218	5						FPO	VL1218	5		na						
	ESP NAO HOK1012	HOK	VL0010	8						HOK	VL0010	8		1	1					
		HOK	VL1012	38						HOK	VL1012	38								
	ESP NAO HOK1218	HOK	VL1218	35						HOK	VL1218	35	1	na	1					
	ESP NAO HOK2440	HOK	VL1824	7						HOK	VL1824	7	2	na	2					
		HOK	VL2440	15						HOK	VL2440	15	1	na	1					
	ESP NAO PMP0010	PMP	VL0010	440						PMP	VL0010	440		6	6					
		PMP	VL1012	4						PMP	VL1012	4								
	ESP NAO PS 1218	PS	VL1012	1						PS	VL1012	1		1	2					
		PS	VL1218	9						PS	VL1218	9	2	na	2					

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is indicated in the table with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note . na - not applicable since the SAR20 indicator relates to segments with vessels less than 12m LOA.

Note 3. The SAR 2025 column provides the SAR indicator according to the Commission Guidelines COM(2025) 798 final and was added following an update of the report.

Sources: 2024 DCF Fleet Economic Data Call; Stock assessment results from all relevant Regional Fisheries Organizations where EU fleets have an interest; IFREMER (French national assessments) for stocks in the French Outermost regions; CITES species list; IUCN Red List 2025

The Spanish OMR fleet is composed by 12 fleet segments (6 clustered). SHI information was available for 6 fleet segments. For the SAR, economic and technical indicators, the MS provides information for all fleet/cluster segments.

Main stocks on which fleet segments rely by region

For each OMR and for those segments that are indicated to be out of balance, a list of the fish stocks on which segments rely are described in the following sub-sections.

In each of the following OMR sections, two sets of data are tabulated:

An upper table, listing for each imbalanced segment, (i) the segment name, (ii) the indicator used to identify the imbalance according to COM (2014) 545 and COM (2024) 223, (iii) the ranked value of the landings of the main species caught by the segment by sea area.

A lower table listing for the SAR indicator, (i) the species contributing to the perceived imbalance in the segment according to the indicator concerned over the most recent 5 years and for other indicators (ii) the indicator values over the most recent 5 years.

6.5.1 Segment - ESP NAO FPO1012 IC *

Imbalance indicators

ESP-NAO-FPO1012-IC-*	CR/BER	RoFTA	FPO	VL1218
			FPO	VL1012

Most representative species in value of landings

Species/area	34.1.2	%
Pink dentex	87 173 €	14.8
Atlantic bluefin tuna	85 618 €	14.5
Red porgy	45 208 €	7.7
White trevally	42 164 €	7.2
Parrotfish	37 330 €	6.3
Skipjack tuna	36 240 €	6.2
European conger	30 124 €	5.1
Large-eye dentex	28 258 €	4.8
Round sardinella	22 567 €	3.8
Narwal shrimp	14 072 €	2.4
Bigeye tuna	13 346 €	2.3

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER		7.52	-0.22	-0.96	0.66
Rofta		181.67	-35.24	-46.86	-8.20

All the economic indicators were under thresholds in 2023. These indicators of economic performance do not consider operation subsidies, especially EMFAF compensation plan.

6.5.2 Segment - ESP NAO HOK1012 IC *

Imbalance indicators

ESP-NAO-HOK1012-IC-*	CR/BER	RoFTA	HOK	VL1012	VUR
			HOK	VL0010	

Most representative species in value of landings

Species/area	34.1.2	34.1.1	Total	%
Atlantic bluefin tuna	690 969 €		690 969 €	27.9
Skipjack tuna	534 135 €		534 135 €	21.6
Bigeye tuna	283 510 €		283 510 €	11.4
Albacore	244 020 €		244 020 €	9.9
Yellowfin tuna	232 310 €		232 310 €	9.4

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	-1.62	1.93	2.56	3.62	0.45
Rofta	-81.12	33.32	34.57	90.96	-21.97

All the economic indicators were under thresholds in 2023. These indicators of economic performance do not consider operation subsidies, especially EMFAF compensation plan.

Historical VUR indicators for the last five years

VUR	2019	2020	2021	2022	2023
HOK VL1012	0.53	0.57	0.53	0.54	0.57

6.5.3 Segment - ESP NAO HOK1218 IC

Imbalance indicators

ESP-NAO-HOK1218-IC	CR/BER	RoFTA	SAR	VUR

Most representative species in value of landings

Species/area	34.1.2	34.1.1	Total	%
Bigeye tuna	866 041 €	141 069 €	1 007 110 €	31.7
Atlantic bluefin tuna	752 945 €		752 945 €	23.7
Skipjack tuna	564 613 €	19 014 €	583 627 €	18.4
Albacore	376 631 €	10 562 €	387 193 €	12.2

SAR - Stocks at Risk

FS	2018	2019	2020	2021	2022	2023
HOK VL1218			smd.34-47	bet.world	bet.world	bet.world

*bet.world= Bigeye Tuna, smd.34-47 = Common smoothhound

Stocks at risk denoted by **bold** type and bigger font size, account for more than 20 % of the total value of the landings of all species by the fleet segment

Stocks at risk denoted by normal type, account for more than 10 % but less than 20% of the total value of the landings of all species by the fleet segment.

Double border cells indicates the stock is selected via both 10 % threshold (dependency on the FS on the stock AND impact of the FS on the stock)

Impact on the FS on the SAR biomass

Dependency of the FS on the SAR

Both thresholds

In 2023 SAR indicates imbalance for this fleet segment due to catches of Bigeye tuna which represents **31.7%** of the total landing value of this fleet segment.

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	4.08	2.50	-0.82	2.58	-1.45
Rofta	52.21	81.84	-45.81	59.91	-98.45

Historical VUR indicators for the last five years

VUR	2019	2020	2021	2022	2023
HOK VL1218	0.60	0.60	0.53	0.52	0.54

6.5.4 Segment - ESP NAO HOK2440 IC *

Imbalance indicators

ESP-NAO-HOK2440-IC-*	BER	ROFTA	HOK	VL1824	SAR
			HOK	VL2440	SAR

Most representative species in value of landings

Species/area	34.1.2	34.1.1	27.8.c	27.8.b	27.8.d	Total	%
Bigeye tuna	2 437 579 €	982 859 €	0 €			3 420 438 €	55.2
Atlantic bluefin tuna	1 193 281 €					1 193 281 €	18.9
Albacore	123 284 €		275 542 €	203 647 €	88 205 €	690 678 €	11.0

SAR - Stocks at Risk

FS	2018	2019	2020	2021	2022	2023
HOK VL1824	smd.34-47			bet.world	bet.world	bet.world
HOK VL2440				bet.world	bet.world	bet.world

*bet.world= Bigeye Tuna, smd.34-47 = Common smoothhound

Stocks at risk denoted by **bold** type and bigger font size, account for more than 20 % of the total value of the landings of all species by the fleet segment

Stocks at risk denoted by normal type, account for more than 10 % but less than 20% of the total value of the landings of all species by the fleet segment.

Double border cells indicates the stock is selected via both 10 % threshold (dependency on the FS on the stock AND impact of the FS on the stock)

	Impact on the FS on the SAR biomass
	Dependency of the FS on the SAR
	Both thresholds

In 2023 SAR indicates imbalance for this fleet segment due to catches of Bigeye tuna which represents 55.2 % of the total landing value of these two fleet segments. Common smoothhound represents 0.16% of the total landing value for the HOK VL1824 fleet segment.

Historical economic indicators for the last five years

	2019	2020	2021	2022	2023
CR/BER	0.10	0.41	0.14	0.58	-0.34
Rofta	-44.63	-27.72	-60.79	-15.94	-278.12

All the economic indicators were under thresholds in 2023. These indicators of economic performance do not consider operation subsidies, especially EMFAF compensation plan.

6.5.5 Segment - ESP NAO PMP0010 IC *

Imbalance indicators

ESP-NAO-PMP0010-IC-*	PMP	VL0010	VUR
	PMP	VL1012	

Most representative species in value of landings

Species/area	34.1.2	34.1.1	Total	%
Parrotfish	1 773 621 €		1 773 621 €	14.6
Pink dentex	1 075 821 €		1 075 821 €	8.9
Red porgy	1 014 417 €		1 014 417 €	8.4
Atlantic bluefin tuna	834 366 €	2 251 €	836 617 €	6.9
White trevally	617 456 €		617 456 €	5.1
Skipjack tuna	551 362 €		551 362 €	4.5
Greater amberjack	379 820 €		379 820 €	3.1
Dusky grouper	337 148 €		337 148 €	2.8
Albacore	158 484 €		158 484 €	2.6
Yellowfin tuna	294 853 €		294 853 €	2.4
Scarlet shrimp	280 976 €		280 976 €	2.3
Wahoo	279 937 €		279 937 €	2.3
Narwal shrimp	269 595 €		269 595 €	2.2
Striped soldier shrimp	260 908 €		260 908 €	2.2
Bigeye tuna	244 343 €		244 343 €	2.0
Island grouper	190 208 €		190 208 €	1.6
Blacktail comber	185 643 €		185 643 €	1.5
Redbanded seabream	177 521 €		177 521 €	1.5
Round sardinella	167 210 €		167 210 €	1.4

Historical VUR indicators for the last five years

VUR	2019	2020	2021	2022	2023
PMP VL0010	0.32	0.32	0.31	0.29	0.31

6.5.6 Segment - ESP NAO PS 1218 IC *

Imbalance indicators - SAR

ESP-NAO-PS-1218-IC-*	PS	VL1218	SAR
	PS	VL1012	

Most representative species in value of landings

Species/area	34.1.2	%
Atlantic chub mackerel	976 904 €	52.7
Round sardinella	302 320 €	16.3
Blue jack mackerel	180 435 €	9.7

SAR - Stocks at Risk

FS	2018	2019	2020	2021	2022	2023
PS VL1218	sae	sae	sae	sae	sae	sae
	saa		saa	saa	saa	saa

* saa = Round Sardinella, sae = Madeiran sardinell

Stocks at risk denoted by **bold** type, account for more than 20 % of the total value of the landings of all species by the fleet segment

Stocks at risk denoted by normal type, account for more than 10 % but less than 20% of the total value of the landings of all species by the fleet segment.

	Impact on the FS on the SAR biomass
	Dependency of the FS on the SAR
	Both thresholds

In 2023 SAR indicates imbalance for this fleet segment due to catches of Madeiran sardinella representing 3.5 % of the total landing value of the fleet segment.

6.6 Summary

Table 6.6.1 summarizes the information on balance indicators and their assessment available for each OMR by Member state for the year 2023. 77 fleet segments were considered for biologic indicators (SAR and SHI) and VUR and 45 clustered fleet segments for the economic indicators and VUR220, (Saint Martin did not present any fleet segment indicator values).

There is a significant shortage of relevant data to compute the biological indicator SHI. SAR was available for 75 segments out of 77 (97%); however, the SHI could be computed for 51, 66% of the 77 fleet segments identified in the OMRs. As with SAR, two French fleet segments did not assess technical or economic indicators.

Table 6.6.1. Summary of balance indicators

	Fleet segments (total)		SAR	SHI	VUR	Fleet segments (clustered)		Rofta	CR/BE R
France	48	Assessed FS	46	35	46	23	Assessed FS	21	21
		Imbalance	2	4	25		Imbalance	8	8
	% imbalance		4	11	54	% imbalance		38	38
Portugal	18	Assessed FS	18	10	18	16	Assessed FS	16	16
		Imbalance	4	0	3		Imbalance	4	3

Spain	% imbalance		22	0	17	6	% imbalance		25	19
	11	Assessed FS	11	6	11		6	Assessed FS	6	6
		Imbalance	4	0	3			Imbalance	4	4
Total	% imbalance		36	0	27	45	% imbalance		67	67
	77	Assessed FS	75	51	75		43	Assessed FS	43	43
		Imbalance	12	4	31			Imbalance	16	15
	% imbalance		16	8	41		% imbalance		37	35

Source: Own elaborations.

7. TASK 4 -STOCKS ON WHICH FLEET SEGMENTS ARE RELIANT

ANNEX III lists for each Member State, those fleet segments that according to the Commission guidelines and based on indicator values (2021 or later if available) for either i) the SHI or ii) the SAR, as computed by the STECF, were indicated to be out of balance with fishing opportunities, together with the fish stocks on which such segments rely and the fishing area to which such segments are attributed.

Annex III is available as part of an Excel workbook which provides separate worksheets containing lists for the North Atlantic (Area 27) the Mediterranean and Black Seas (Area 37), the Outermost regions of France, Portugal and Spain (OMR), and other fishing regions (OFR).

The workbook name is STECF 25-12 - Annexes - Ia-Ib-Ic-III.xlsx and is available at https://stecf.ec.europa.eu/reports/balance-between-capacity-and-fishing-opportunities_en

8. LIST OF ANNEXES

Annexes appended to the report

Annex I – Methods of calculating indicators and trends – appended to report.

Electronic annexes

- Annex II – Indicator Comparison Tables.xlsx
- Annex IA – Biological indicator stock reference list
- Annex IB – Reference list for stocks at risk
- Annex IC – Detailed information for stocks at risk
- Annex III – Stocks on which fleet segments are reliant (areas 27 and 37 OFR and OMR Separately)
- Annex IV – Species identified as SAR in 2023 according to the Commission Guidelines COM(2014) 545)
- ANNEX V – Balance capacity – indicator table

The above electronic Annexes are located in four separate Excel workbooks and are published on at:

<https://stecf.ec.europa.eu/document/987e8e24-d62b-462f-aed8-0542f0840f3b>

STECF 25-12 - Annexes - Ia-Ib-Ic-III.xlsx
 STECF 25-12 ANNEX II indicator comparison tables.xlsx
 STECF 25-12 ANNEX-IV Stocks at risk.xlsx
 STECF 25-12 Balance capacity – indicator table.xlsx

9. CONTACT DETAILS OF EWG-25-12 PARTICIPANTS

¹ - Information on EWG participant's affiliations is displayed for information only. In any case, Members of the STECF, invited experts, and JRC experts shall act independently. In the context of the STECF work, the committee members and other experts do not represent the institutions/bodies they are affiliated to in their daily jobs. STECF members and experts also declare at each meeting of the STECF and of its Expert Working Groups any specific interest which might be considered prejudicial to their independence in relation to specific items on the agenda. These declarations are displayed on the public meeting's website if experts explicitly authorized the JRC to do so in accordance with EU legislation on the protection of personnel data. For more information: [How to get involved - European Commission](#)

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10. ANNEXES

Methods of calculating indicators and trends

A1.1 Sustainable Harvest Indicator (SHI)

According the 2014 Balance Indicator Guidelines (COM 2014, 545 final), the sustainable harvest indicator is a measure of how much a fleet segment relies on stocks that are overfished. Here, “overfished” is assessed with reference to F_{MSY} values over time ($F / F_{MSY} > 1$), and reliance is calculated in economic terms (landed value). Values of the indicator above 1 indicate that a fleet segment is, on average, relying for its income on fishing opportunities which are structurally set above levels corresponding to exploitation at levels corresponding to MSY. According to the 2014 Balance Indicator Guidelines this could be an indication of imbalance if it has occurred for three consecutive years.

A detailed description and discussion of the methodology can be found in the STECF report 15-02. According to the 2014 Balance Indicator Guidelines the SHI is calculated for each national fleet segment (or cluster of segments dependent on the information provided by Member States via the economic data call), using the following formula:

$$\frac{\sum_{i=1}^{i=n} V_i \frac{F_i}{F_{msy_i}}}{\sum_{i=1}^{i=n} \sum V_i}$$

In which, F_i is the fishing mortality available for stock i from scientific assessments (e.g. ICES, STECF, GFCM, ICCAT, IOTC, NOAA advice and following 2024 guidelines, national stock assessment for OMR fleets less than 12 m vessel length) and V_i is the value of landings from stock i . Data on F_i (mean F , ie Fish mortality) and F_{MSY} for fish stocks found in Area 27 were obtained from the ICES online database, a database of stock assessments output summaries (<http://standardgraphs.ices.dk/stockList.aspx>). For Area MBS output from assessments carried out by STECF working group was compiled by JRC (<https://stecf.jrc.ec.europa.eu/web/stecf/dd/medbs/sambs>). In addition, information on F/F_{MSY} was scrutinized from GFCM Stock Assessment Results tool (STAR) (<https://www.fao.org/gfcm/data/star/es/>). Information on tuna / tuna-like species was obtained from the ICCAT (<http://www.iccat.es/en/>) and IOTC website (<http://www.iotc.org/>). In addition, we considered stocks fished by European fleets in NAFO area (www.nafo.int) as well as in SPRFMO (e.g, jack mackerel, www.sprfmo.int). CECAF report was also used for area 34. Stock smart NOAA database was also used (<https://apps-st.fisheries.noaa.gov/stocksmart>). The full indicator time series (2008-2024) was updated based on the most recent assessments available (2024 or 2025 is most cases) and F_{MSY} point estimates.

For this report, the reference year is 2023. According to that reference year, data for 2024 will not be included for analysis.

Landings data are in many cases not available at species level and often more than one stock is present in a certain area. Sometimes the genus code is used in logbooks, and it covers more than one species for example RED for *Sebastes* spp (it covers for RED *Sebastes mentella* and REG *Sebastes norvegicus*). STECF EWG 17-08 decided to use the last five years of landings data provided in the ICES advice sheets at the stock level to estimate the proportion of each stock in the DCF landing's data. STECF 18-14 applied the same approach. The use of data from the ICES database is necessary since data reported under the DCF do not contain landings from shared stocks by non-EU fishing fleets.

For the Mediterranean Sea, stocks may be assessed either as belonging a single or multiple GSAs, and in such cases, more than one assessment may be carried out. In such cases to associate a landings value to the F/F_{MSY} estimate for each stock assessment, we simply divide the total landings value reported for the combined GSAs by the number of assessments.

For example, for hake (HKE) in GSAs1 two assessments are carried out; one for hke in GSA 1 and a second for hke in GSAs 1, and 3 combined. Therefore, 50% of the total landings value from GSA 10 is associated with the value of F/F_{MSY} resulting for the GSA 1 assessment and 50% to that for GSAs 1 and 3.

The most important issues related to the calculation of indicator values discussed and addressed during the EWG 19-13 Prep and previous Prep. Meeting are outlined below:

- Stock Assessment Selection - The 2014 Balance Indicator Guidelines state the calculation of the SHI indicator should take into account '*the most recent value of fishing mortality available from scientific assessments*'. The EWG 20-11 Prep. Meeting discussed the approach which should be taken in the absence of recent, updated stock assessments, and agreed that the SHI should take into account all stocks for which the most recent assessment was undertaken in 2020 or more recently.
- Norway Lobster FUs - Information from the ICES stock assessment graph database has been used to split the *Nephrops* landings in a given area into Functional Unit (FU) based estimates (if there was more than one FU in a given area). An average over the last five years' landings by FU has been used to calculate the splitting factors. Only *Nephrops* FUs with harvest rates and F_{MSY} values available (category 1 *Nephrops* stocks) are included in the calculation of the SHI indicator. Possible shortcomings of this method are described in section 3.4.2.
- Numerous stocks are assessed at national level and we have no peer review RFMO's validation. That is often the case for very coastal and valuable resources (e.g. scallops). We recommend to develop a framework to be able to include all those "non RFMO" assessment. It should also be used to assess stock that are evaluated for OMR.
- EWG 25-12 Prep. Meeting participants noted that the list of F/F_{MSY} ratios in the JRC database now covers all STECF and GFCM stocks assessment outputs.
- EWG 25-12 Prep. Have tried to include more category 3 stocks from ICES (Data limited stocks). Due to unstandardized dissemination on ICES website, the data collection for these stocks remains uncertain and need to be double checked.
- In cases where stock assessments were available from more than one source, the more updated stock assessment was taken into account for SHI calculations. Where STECF and GFCM assessment were available and values of F and/or F_{MSY} differed, both assessments were retained and the SHI calculations were based on an average of the two assessment results.
- The 2024 Commission guidelines (COM(2024) 223 Final) allow Member States to use the results of national fish stock assessments that have not undergone external peer review, as input to computing the SHI but only for fleet segments less than 12m in length. To be included, this information should be clearly provided and documented within national fleet reports. Hence the additional national stock assessment results are being selectively applied to fleet segments less than 12m and ignored for segments greater than 12m in length even if both segment length groups are exploiting the same stocks. Such an approach may give rise to misleading and/or biased SHI estimates. Furthermore, there is a risk that computational errors could also

occur as a result of having to use different stock assessment results to compute SHI values for different fleet segment length groups. Ideally, the same stock assessment information should be used for all fleet segments that exploit a particular stock.

Instances where the SHI indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments are highlighted in the indicator table. The Commission guidelines specify that for such fleet segments, SHI indicator values cannot be used meaningfully to assess the balance or imbalance. No trend analysis was performed for such fleet segments.

A1.2 Stocks at Risk Indicator (SAR)

According to the 2014 Balance Indicator Guidelines (COM 2014, 545 final), the stocks at risk indicator is a measure of how many stocks that are biologically vulnerable are being affected by the activities of the fleet segment, i.e., stocks which are at low levels and are at risk of not being able to replenish themselves and which are either important in the catches of the fleet segment or where the fleet segment is important in the overall effects of fishing on the stock. If a fleet segment takes more than 10% of its catches taken from a stock which is at risk, or the fleet segment takes 10% or more of the European fleets' total catches from a stock at risk, the 2014 Balance Indicator Guidelines suggest that this could be treated as an indication of imbalance.

According to the 2014 Balance Indicator Guidelines the SAR indicator aims to count the number of stocks that are exploited by a fleet segment and which are currently assessed as being at high biological risk either regarding the total catch of the stock or the total catch of the fleet segment. According to the definition of the SAR indicator in the 2014 Balance Indicator Guidelines, a stock at risk (SAR) means a stock which is either:

- a) assessed as being below the B_{lim} ; or
- b) subject to an advice to close the fishery, to prohibit directed fisheries, to reduce the fishery to the lowest possible level, or similar advice from an international advisory body, even where such advice is given on a data-limited basis; or
- c) subject to a fishing opportunities regulation which stipulates that the fish should be returned to the sea unharmed or that landings are prohibited; or
- d) a stock which is on the IUCN 'red list' or is listed by CITES.

AND for which either:

- 1- the stocks make up to 10% or more of the catches by the fleet segment; **or**
- 2- the fleet segment takes 10% or more of the total catches from that stock.

The meaning of these last two conditions are represented in Figure A1.1. Here, three stocks are exploited by five fleet segments, and landings data (in weights) are available for each stock/fleet segment. The marginal sum of landings for each fleet segment is computed (by row) and used to scale each landing value to its relative contribution (in percentage) to the total landings for each fleet segment. In the meantime, the marginal sum of landings for each stock (by column) is computed and used to scale each landing value to its relative contribution (in percentage) to the total landings for each stock. According to the SAR definition, all the cases in which either the relative contribution by fleet segment or by stocks is equal to or larger than 10% are selected and considered for the SAR. Then, the value of the SAR for each fleet segment corresponds to the number (if any) of the stocks over the threshold (highlighted in orange) and listed as "at risk". In the example of Fig. A1.1, if all the

stocks (A, B, and C) are defined “at risk”, the Fleet segments 1 and 2 will have a SAR=1, while the Fleet segments 2-5 will have a SAR=2.

Figure A1.1. Example of pre-processing of landings data for the computation of the SAR indicator.

Landings (weights)				
	Stock A	Stock B	Stock C	
FS1	25	3	3	31
FS2	2	30	0	32
FS3	11	0	100	111
FS4	3	10	30	43
FS5	7	75	0	82
	48	118	133	



Landings (% by FS)				
	Stock A	Stock B	Stock C	
FS1	80.645	9.677	9.677	100.000
FS2	6.250	93.750	0.000	100.000
FS3	9.910	0.000	90.090	100.000
FS4	6.977	23.256	69.767	100.000
FS5	8.537	91.463	0.000	100.000



Landings (% by STOCK)				
	Stock A	Stock B	Stock C	
FS1	52.083	2.542	2.256	
FS2	4.167	25.424	0.000	
FS3	22.917	0.000	75.188	
FS4	6.250	8.475	22.556	
FS5	14.583	63.559	0.000	
	100.000	100.000	100.000	



Cross-table FS-Stock				
	Stock A	Stock B	Stock C	
FS1	1	0	0	
FS2	0	1	0	
FS3	1	0	1	
FS4	0	1	1	
FS5	1	1	0	

Source: own elaborations.

In 2024 new guidelines were introduced for OMR COM (2014) 545 final which specifies: Member States may consider, for fleet segments consisting of vessels of less than 12 metres in length in the outermost regions, that a stock at risk is “exploited by” a fleet segment if the stock makes up more than 20% of the catches of the fleet segment, or if the fleet segment takes more than 10% of the catches of the stock. Member States should submit detailed data and explanations of the calculations applied as well as the scientific reasons for the application of this alternative threshold value in an annex to the fleet report for further scrutiny by the STECF.

The Guidelines of COM(2025) 798 final were introduced to replace the temporarily Guidelines of 2024 specifying that for vessels of less than 12 m in length operating in the Outermost Regions, that a stock at risk is “exploited by” a fleet segment if the stock makes up more than 20% of the catches of the fleet segment, and if the fleet segment takes more than 10% of the catches of the stock. Member States should submit detailed data and explanations of the calculations applied as well as the scientific reasons for the application of this alternative threshold value in an annex to the fleet report for further scrutiny by the STECF.

During the preparatory meeting EWG 25-12, international stocks or species were examined. For the 2025 Balance Group, 454 items were considered at risk for at least one year of the time period 2008-2024. They are representing over 454 stocks considering that some regulation relates to groups (e.g. Mobula listing in CITES count for one item but consist in 8 species).

The total number of Stocks at Risk increased from 2012 to 2024, mainly due to the introduction of new fishing regulation texts including some fishing prohibition to data limited species with scientific concerns but also due to the improvement in quality and availability of some RFMO's assessments (Figure A1.2). It should be noted that for 2024 the vulnerable species were considered for SAR selection as IUCN approach for Threatened species. Since 2021, a large number of IUCN species were reviewed at regional or global; as these assessments were mainly made available in 2025 it allows the Preparatory EWG 25-12 to include new species.

For 2025, 16% of the stocks were selected based on quantitative data (SSB/B_{lim}). SAR selection due to RFMO's advices based on quantitative data different from B_{lim} represent 18% of the cases. Whereas 14% of the stocks or species were selected based on regulations (EC or RFMOs).

The same methodology described in the STECF 15-02 / 15-15 reports was applied by the expert selecting stocks for the calculation of the SAR. The calculation of the indicator was then carried out using a SQL coding. The code is designed to compute the SAR indicator value, for the temporal range defined by the input data, for each fleet segment, by cross-checking DCF landings data provided by JRC with a list of stocks-at-risk prepared by *ad hoc* contract and validated during the preparatory working group.

The same methodology used for attributing landings data available at species level to stocks was used for the calculation of the SAR indicator (see section 3.3.1). The full list of stocks at risk identified for the assessed fleet segments for years 2008 – 2024 are given in Annex IA to this report.

The most important issues related to the calculation of indicator values discussed and (where possible) addressed during the EWG 24-13 Prep. Meeting and previous Prep. Meeting are outlined below:

- GFCM - Whereas in parallel stock status information for Mediterranean are making easily accessible and the number of stock assessments have increased, more stocks were able to be considered and some new items have been added as SAR.
- When B_{lim} was not available a proxy of 0.4 SSB_{msy} were agreed to be used for some RFMO's stocks as for instance the inclusion of Striped Marlin (*Tetrapturus audax*) in IOTC.
- The experts agreed to select only the “critically endangered” (CR), “Endangered” (EN) and “Vulnerable” (VU) species of marine species (e.g fish, mollusk and echinoderm) used for human food consumption listed on the IUCN Red list as stocks at risk for the SAR calculation.
- However some other groups such as Marine mammals, birds, reptiles, corals, etc. category would also make sense to be considered in the future, in relation with ETP and sensitive species methodology developed for the STECF EWG 22-05 of fish product transparency.
- SAR definition criteria “c” includes some EC Regulations for fishing opportunity. However the temporal measures listed in such Regulations cannot be included in the

SAR selection (eg. Porcupine bank closure from 01-31 May). Specific gear restrictions were not taken into account neither (for calculation simplification purpose, see above).

- The group stressed that the information on SAR criteria “c” and “d” are still heterogeneous from the various relevant reports and selection of stocks still dependent on interpretation, with the exception of criteria “a” and “b”. However, some progress was noticeable since 5 years in term of quality and clarity of the RFMO’s advice.
- The group highlight the impossibility to perform properly the calculation for some highly distributed stocks. Only the first threshold calculation can be performed (the stocks make up to 10% or more of the catches by the fleet segment) but the second one is partial (the fleet segment takes 10% or more of the total catches from that stock.) considering that the EWG does not have access to the total catch of the corresponding stocks. This is the case of some Outermost regions stocks but it’s also the case for mainland where some stocks are assessed at by member states (eg. Scallops), these national assessments while available might be considered for estimation. National regulations together with National expert knowledge may also prove to be informative regarding the identification of SARs, especially regarding localized areas and stocks. A complete data collection for total landings by year for stocks at risk should be developed and included in the calculation process. Following an update of the report, total stock landings of several stocks landed by OMR fleet segments that comprise vessels of less than 12 m in length have been updated based on the values reported in the French fleet report.
- There is a need to take into account other International conventions in defining a SAR for fish and other marine organisms. These International Conventions could be considered in the future: Bonn, Bern, Ospar, Barcelona, SPAW, CMS, etc.
- The report from that exercise is made publicly available through STECF EWG reports or Data dissemination tool platform; this reference document aims to be more easily appropriated by MS and increases transparency in the SAR assessment process.
- While the current balance/capacity exercise focuses on fleet segments and exploited resources, consideration may need to be given to extending the scope to include fisheries impacts on habitats and ecosystems. Recently, ICES started to work on a selection of habitats in order to build a VEM’s index (Vulnerable Marine Ecosystem) and evaluate the impact of fisheries on ecosystems in the framework of an EU request. However, so far we have a list of VEM but not really linked it to fisheries. This may be worth further consideration as a means to progress along such lines.
- Since 2021 the online platform for Biological Indicator (Institut Agro on line Atlas) offers the possibility to check directly Fleet segments involved in landing the stocks listed at risk; this can be considered as a major improvement for experts to explain MS situation in regards to SAR values assessments as potentially imbalance as well as trying to evaluate the discrepancies between MS and JRC calculation for SAR.

- A dedicated paragraph analyzing the situation for OFR was performed during the main EWG 25-12. A new traffic light table was provided with a purple ranking which correspond to either :
- the impact of the FS landing to the stock at risk,
- the dependency of the FS to the stock at risk,
- both conditions are met.

In addition the name of the stocks are provided for each fleet segment flagged with SAR indicator =1 and more, when the proportion of its landing volume is more than 20% of the total landing of the FS the name of the stock is written in bold

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Annex IB – Reference list for stocks at risk

Annex IC – Detailed information for stocks at risk

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Annex III – Stocks on which fleet segments are reliant (areas 27 and 37 OFR and OMR Separately)

Annex IV – Species identified as SAR in 2023 according to the Commission Guidelines COM(2014) 545)

ANNEX V – Balance capacity – indicator table

The above electronic Annexes are located in four separate Excel workbooks and are published on:

<https://stecf.ec.europa.eu/document/987e8e24-d62b-462f-aed8-0542f0840f3b>

STECF 25-12 - Annexes - Ia-Ib-Ic-III.xlsx

STECF 25-12 ANNEX II indicator comparison tables.xlsx

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STECF 25-12 ANNEX V Balance capacity – indicator table.xlsx

Additional Annexes were produced for STECF-PLen-26-01

ESP OMR traffic light table

FR trafficlight table

PT trafficlight table

SAR_criteria_evolutionv0.2-AJ

And are published on: <https://stecf.ec.europa.eu/document/987e8e24-d62b-462f-aed8-0542f0840f3b>

LIST OF BACKGROUND DOCUMENTS

EWG-25-12– Doc 1 - Declarations of invited and JRC experts (see also the section of this report ‘Contact details of EWG-25-12 participants’)

Background documents are published on:

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