

## Research for PECH Committee

### Workshop on the future of the EU fishing fleet – First assessment of Member States' EMFAF programmes for 2021-27



#### Background

This PECH Committee workshop discusses how the current European Maritime, Fisheries and Aquaculture Fund (EMFAF) and its potential successors can help to positively shape the future of the EU fishing fleet. The analyses focus on three specific articles of the EMFAF Regulation: Article 17 on “First acquisition of a fishing vessel”, Article 18 on “Replacement or modernisation of a main or ancillary engine” and Article 19 on “Increase of gross tonnage to

improve safety, working conditions or energy efficiency”.

The workshop is structured around four studies prepared by independent researchers. The **Synopsis on coastal Member States** (Part I) provides a general overview of the EMFAF Regulation and outlines the state of implementation of the national programmes. This overview is complemented by three case studies on **Spain** (Part II), **France** (Part III) and **the Netherlands** (Part IV), which discuss national particularities as regards the structure of the fishing fleets and the state of play of EMFAF implementation in these Member States.

#### Part I: Synopsis on coastal Member States

While the overall EMFAF Regulation was drafted with the intention of designing a simple architecture without pre-defining measures and detailed eligibility rules at Union level and leaving substantial scope for decision-making to Member States, **the rules in Articles 17, 18 and 19 are rather prescriptive**. The intention is clearly to avoid supporting overcapacity and overfishing

The present document is the executive summary of the PECH workshop on “*The future of the EU fishing fleet – First assessment of Member States' EMFAF programmes for 2021-27*”. The respective workshop document with four studies is available in English and can be downloaded at: <https://bit.ly/3Zb3d4w>

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through ambivalent measures. However, this strict approach conflicts on the one hand with the desired flexibility, and on the other with the potential effectiveness of the measures, since any restrictions inevitably reduce the applicability of the support instruments.

A large majority of the active fishing vessels in the EU fleet (96%) would be eligible for support under *Articles 17–19* based on their overall features, in particular on their length of up to 24 metres (2022 data). However, these vessels represent only 34% of the total capacity of the EU fishing fleet (in gross tonnage) and 67% of its total engine power (in kW). They account for 29% of the weight and 48% of the value of the total landings of the EU fleet (2021 data). Furthermore, a significant proportion of these vessels are in fact not eligible because the fleet segments in which they operate are not in balance with the available resources. The exact share of eligible vessels cannot be quantified within the scope of this study, due to the complexity of the relevant rules and calculations. The fact that **important parts of the fleet are excluded by the eligibility rules** limits the potential effectiveness of the measures from the outset.

Support for generational renewal and decarbonisation of the fishing fleet is an important priority identified in the national EMFAF programmes. However, **only 12 of the 22 coastal Member States have allocated budgets to measures under Articles 17 or 19, and only 16 to measures under Article 18**. In general, the three articles are rather complementary instruments for a limited number of cases.

As of June 2024, only **13 operations have been implemented under Article 17, 39 operations under Article 18 and none under Article 19**. Only five Member States have used Article 17 and/or 18 of the EMFAF so far. There will certainly be further demand, but support under these three articles will almost certainly remain a minor part of the support to the EU fleet under the EMFAF.

## Part II: Case study on Spain

The Spanish fishing fleet, consisting of 7 635 active vessels in 2022, is one of the largest national fleets in the EU. The majority of the Spanish vessels are below 24 metres, and therefore eligible for support under EMFAF Articles 17-19. While only 9% of the vessels are more than 24 metres in length and are not covered by these articles, this part of the fleet represents more than 60% of national landings and more than 50% of the national fishing capacity in gross tonnage. With an average age above 35 years, the Spanish fleet is in need of renewal and modernisation, to ensure safer, more efficient and more comfortable vessels. This would be crucial to achieve the decarbonisation target and serve as an incentive for future generations of fishers.

The Spanish EMFAF programme foresees more than EUR 19 million under Articles 17 and 19, and EUR 3.7 million under Article 18. So far, no operations have yet been registered in Spain under any of these articles.

## Part III: Case study on France

In 2022, the French fishing fleet registered in the mainland included 4 223 fishing vessels, of which 81% are vessels of less than 12 metres in length. The average age of the fleet (around 30 years) and its low renewal rate (less than 1% by year) evidence the need for modernisation.

The EMFAF programme of France allocates EUR 6.3 million for Article 18 and EUR 17.4 million for Articles 17 and 19. The EMFAF modernisation measures framed by Articles 17 and 18 (with 26 and 10 operations implemented respectively) are successful in attracting operators of the small scale coastal fleet, but are relatively ineffective for other fleet segments. EMFAF measures framed by Article 19 failed to attract interest until now due to a perceived lack of relevance of this measure in view of the technical situation of the fishing fleet.

## Part IV: Case study on the Netherlands

In 2022, the Dutch fishing fleet was composed of 508 vessels. Of these, 380 vessels were smaller than 24 metres and fish for demersal species, 120 were demersal vessels over 24 metres and 8 vessels were large pelagic (freezer) trawlers. The Dutch fishing fleet is facing a difficult economic situation, coupled with major environmental, technological and social challenges. Consequently, the size of the fleet is decreasing and the average age of vessels is rising.

The EMFAF programme of the Netherlands has allocated EUR 7 million for supporting projects under Article 18. It is foreseen to support 100 projects, which will be implemented after 2024. The Netherlands does not foresee to make use of Articles 17 and 19.

## Policy recommendations for adaptations of funding rules

Based on the evidence reviewed in the four studies, the following sets of policy recommendations are set out in the four parts of the PECH Committee workshop:

### Recommendations based on the synopsis study on all EU Member States

- Future support instruments for fisheries should consider **less restrictive conditions** for support for the first acquisition of a fishing vessel, for engine renewal or replacement and for vessel improvements requiring additional tonnage. This could help to increase their effectiveness, while avoiding potential negative effects in other ways.
- Consideration should be given to **applying restrictions** to avoid overcapacity or overfishing **at the level of individual segments or the entire national fleet**. At the same time, individual fishing vessels should be enabled to adapt to economic, environmental and social needs.

### Recommendations based on the case study on Spain

- A **common decarbonisation strategy** for the EU fishing fleet should be set up, as regards both artisanal and industrial fleets.
- **Construction of new fishing vessels** that are more energy efficient and provide better working conditions on board vessels should be allowed.
- An **emergency investment fund** should be created, to accelerate the response to investment needs for implementing the energy transition.

### Recommendations based on the case study on France

- **Accessibility of the funding** should be improved, by adapting the conditions for replacement or modernisation of engines for fishing vessels other than small-scale coastal fishing vessels, considering the propulsion technologies available to the different categories of fishing vessels in 2027 and beyond, with the possibility to introduce different treatments according to environmental criteria.
- **Investment in new vessels** should be fostered, by identifying funding opportunities to support the introduction of new energy-efficient fishing vessels in accordance with WTO rules on fisheries subsidies and to reverse the aging trend of the fishing fleet, as modernisation of aging vessels has technical and financial limits.

- **Clarifications on the eligibility conditions** that may be subject to interpretation should be provided to Member States and targeted beneficiaries, through Commission Implementing Acts or official guidance documents as appropriate.

## Recommendations based on the case study on the Netherlands

- Post-2027 adjustment of EMFAF should **increase the flexibility of support**, so that it can be decided at national or even local level what support is best suited to address specific challenges.
- The **eligibility threshold of 24 metres** should be either increased or dropped altogether, as in the Netherlands the larger vessels are important from the perspective of food production.

## Further information

This executive summary is available in the following languages: English, French, German, Italian and Spanish. The workshop document, which is available in English, and the summaries can be downloaded at: <https://bit.ly/3Zb3d4w>

More information on Policy Department research for PECH:  
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