

# Degree of representation of the small-scale fishing fleet based on participation of the fleet within the management boards of existing fishing organisations

Deliverable 2

BG SEA CONSULTING EIRL, *February 2016*



# 1. Small-scale fleet share in SWWAC's area

	Under 12m		Above 12m		% < 12	
	Landings (Kg)	Landings (€)	Landings (Kg)	Landings (€)	Landings (kg)	Landings (€)
<b>Portugal - 2014 (1)</b>	<b>27260672,9</b>	<b>83947692,18</b>	<b>85347519,53</b>	<b>143754824,3</b>	<b>24%</b>	<b>37%</b>
<b>Spain - 2015 (2)</b>	<b>35588680,7</b>	<b>147461052,4</b>	<b>290113133</b>	<b>580662347</b>	<b>11%</b>	<b>20%</b>
Andalucia	7482049,41	27485522,04	50420369,89	127139833,1	13%	18%
Canarias	3888740,51	10328831,65	7690155,18	14484053,81	34%	42%
Cantabria	3065173,26	2441917,54	26268346,41	34307537,26	10%	7%
Galicia	16413922,75	96114813,23	135957546,2	270579811,3	11%	26%
Pais Vasco	815588,03	1446139,47	53812761,67	95604883,49	1%	1%
Principado de Asturias	3923206,76	9643828,48	15963953,61	38546227,98	20%	20%
<b>France (POs) - 2014 (3)</b>	<b>9226272</b>	<b>48859170,34</b>	<b>96522563,03</b>	<b>269772093,7</b>	<b>9%</b>	<b>15%</b>
OP Pêcheurs Aquitaine	1375000	7016459	14322000	46010711	9%	13%
OP FROM Sud Ouest	/	/	/	/	/	/
OP Cotinière	340000	2400000	789000	3600000	30%	40%
OP Vendée	180000	1476444	1496000	5037106	11%	23%
OPPAN	294 830	1 599 201	1 037 554	7 486 833	22%	18%
OP Pêcheurs de Bretagne	7036442	36367066	78878009	207637444	8%	15%
<b>SWWAC AREA (4)</b>	<b>72075626</b>	<b>280267915</b>	<b>471983216</b>	<b>994189265</b>	<b>13%</b>	<b>22%</b>

Source :

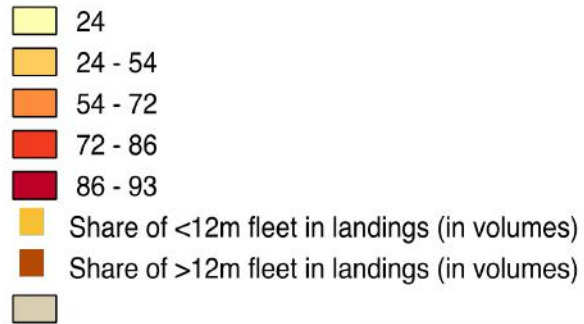
(1) Portugal, DGRM

(2) Spain, SEGEPESCA (MAGGRAMA)

(3) France, Producers organisations (personal communication), therefore missing data from vessels outside POs

## Weight of the small-scale fleet in the landings (in volumes)

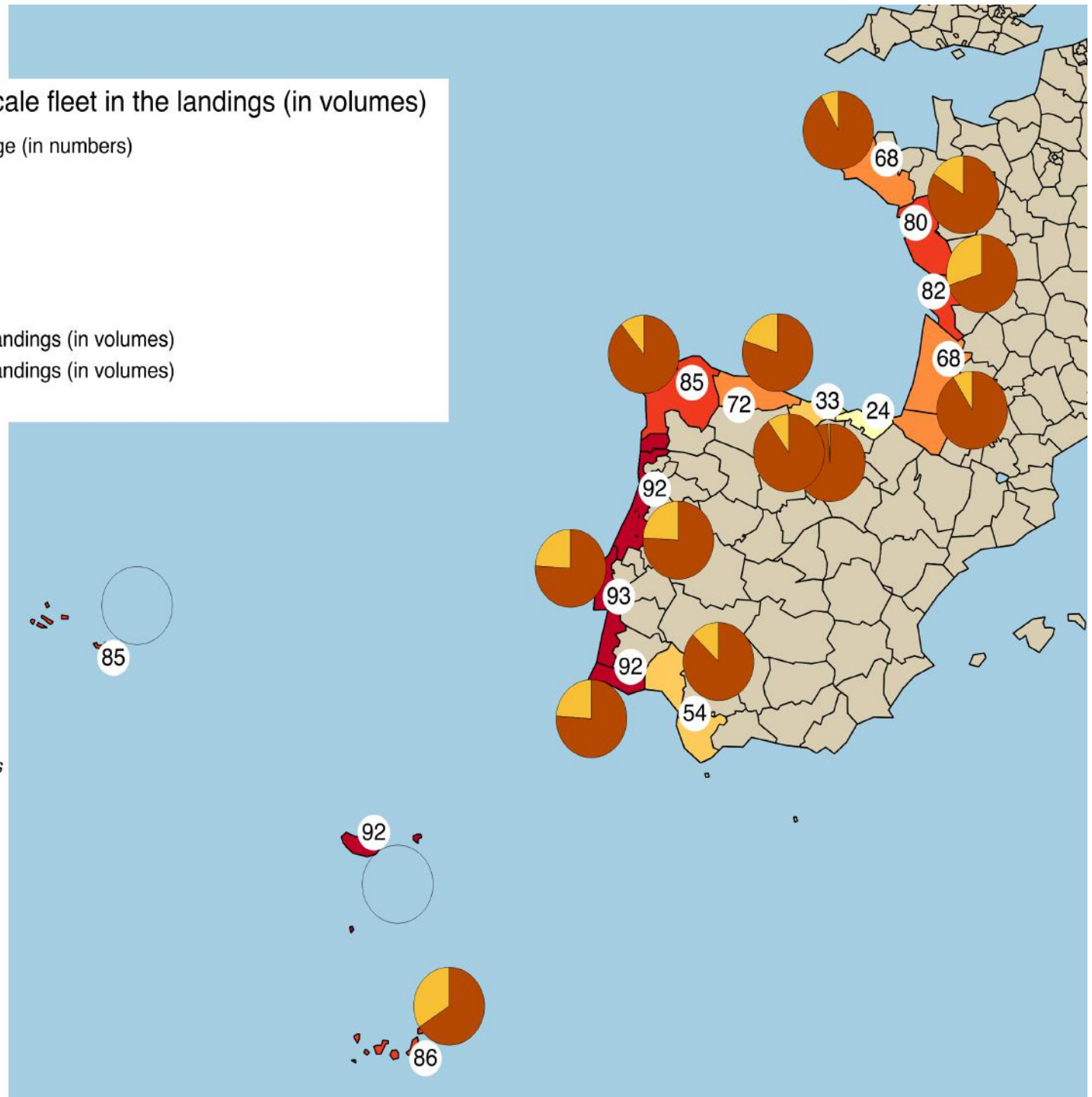
Small-scale fleet in percentage (in numbers)



Source :  
 Portugal, DGRM for the whole country for 2014  
 Spain, SEGEPESCA by autonomous community for 2015  
 France, Producers Organisations's data for 2014

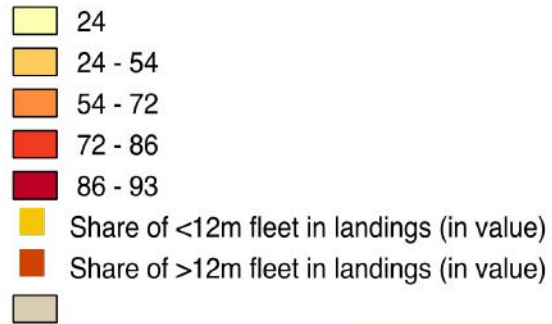
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100 0 100 200 300 400 km



## Weight of the small-scale fleet in the landings (in value)

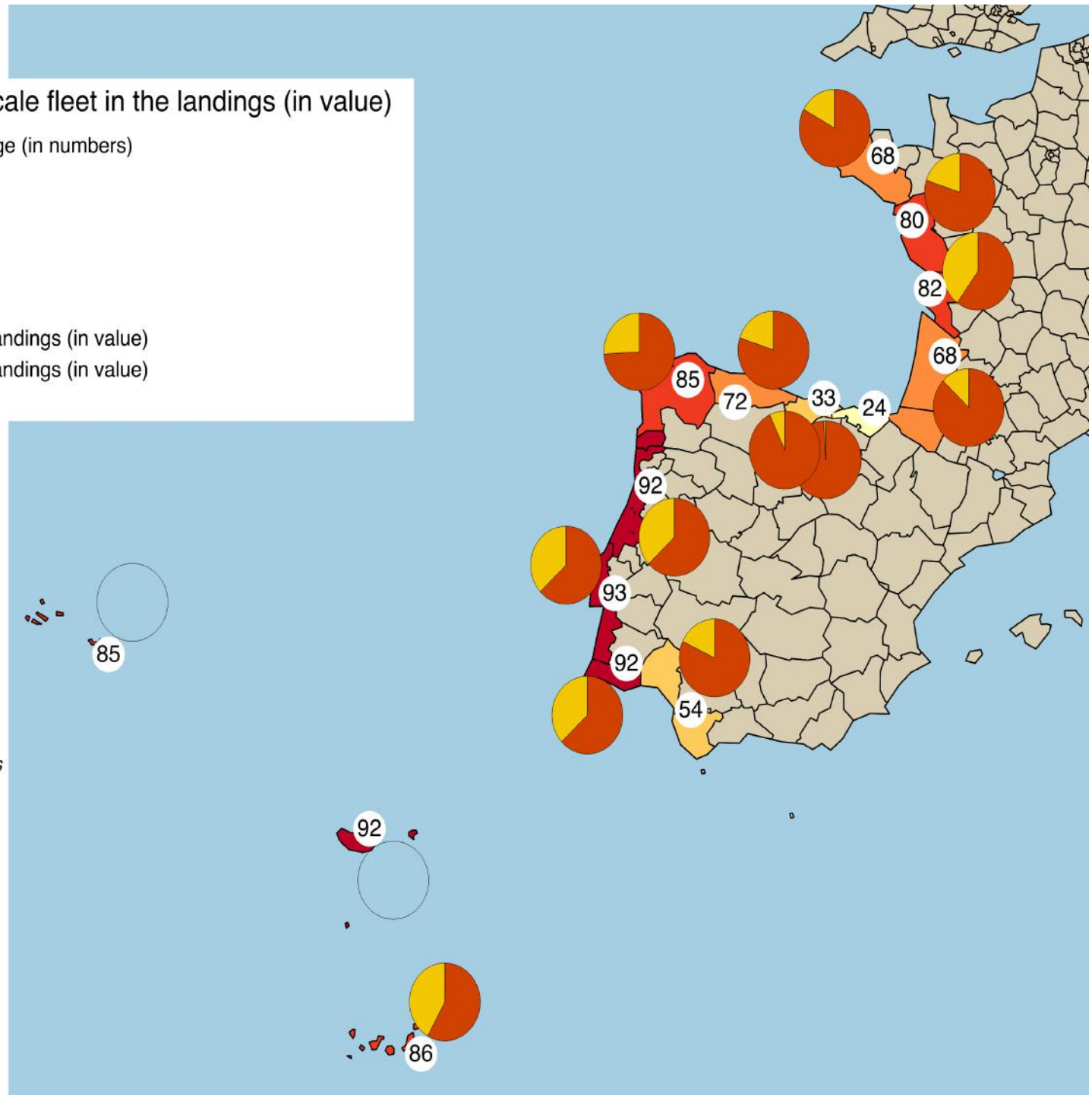
Small-scale fleet in percentage (in numbers)



Source :  
 Portugal, DGRM for the whole country for 2014  
 Spain, SEGEPECSA by autonomous community for 2015  
 France, Producers Organisations's data for 2014

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100 0 100 200 300 400 km



2. Small-scale fishing fleet share in existing fishing organisations (within membership)

Number of organisations (from interviewed organisations, Total : 95)	First category SSF < 59%%	2 <sup>nd</sup> category 59%≤%SSF<80%	3rd category 80%≤SSF<96%	4th category SSF≥96%
Canarias	0	1	2	1
Madeira	0	1	0	0
Azores	0	0	1	3
Andalusia	2	2	1	3
Portugal - South	1	2	3	4
Portugal - Center	5	2	1	4
Portugal – North	2	1	5	5
Galicia	3	4	5	6
Asturias	1	3	1	0
Cantabria	4	0	0	0
Spanish Basque Country	1	1	1	0
Aquitaine	1	2	1	0
Poitou-Charentes	0	1	1	0
Pays de la Loire	0	3	0	0
Bretagne	2	1	1	0



## % SSF within existing fishing organisations

Total fishing fleet in numbers

138 - 259

259 - 436

436 - 1802

1802 - 2750

2750 - 4746

SSF < 59% (eg. fishing organisations where SSF > 59%)

59% ≤ SSF < 80%

80% ≤ SSF < 95%

95% ≤ SSF

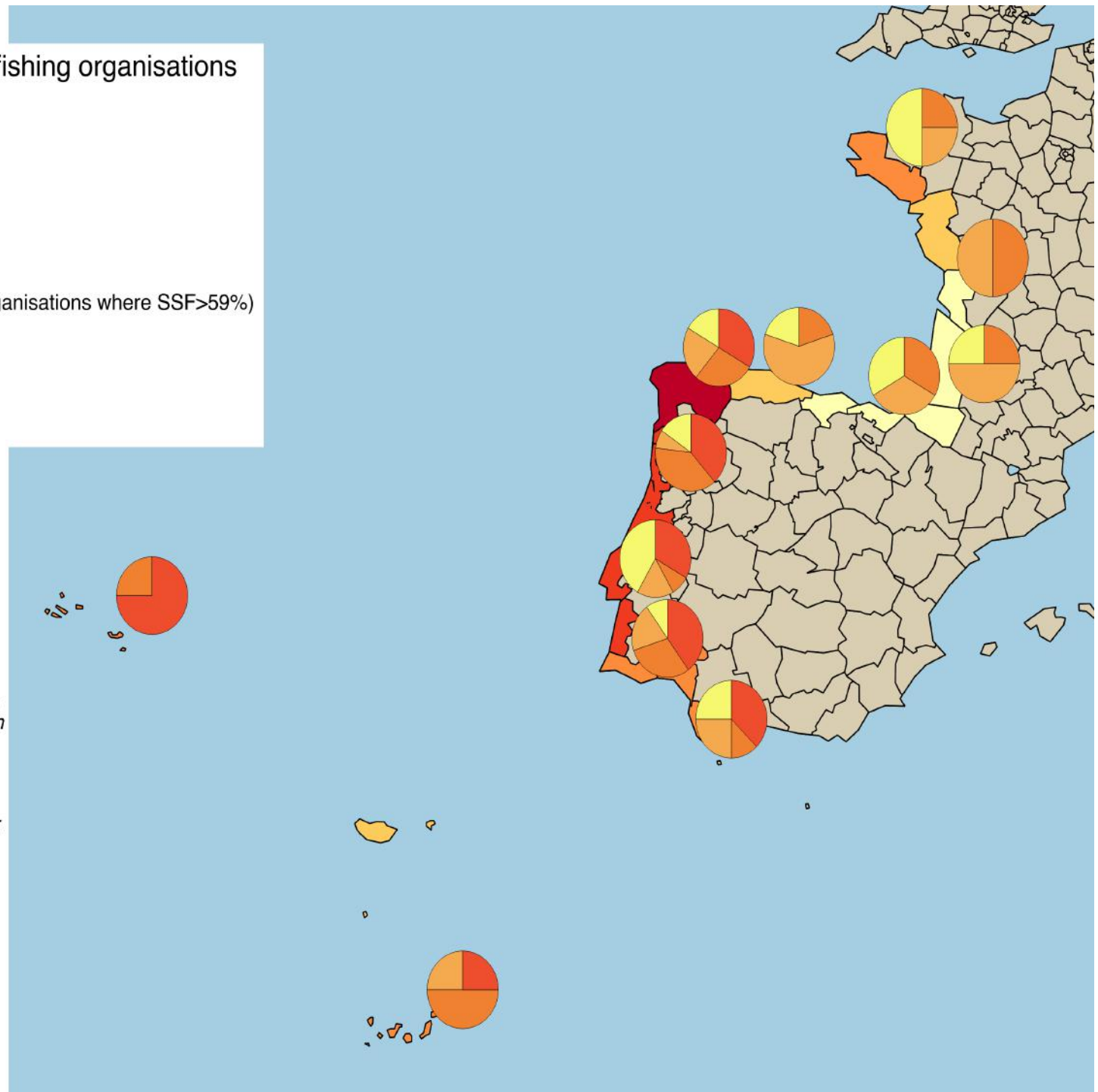


Source :  
community fleet register, Field  
interviews (95 interviews for which  
data about membership have been  
collected)

NB. Where diagrams do not  
appear : for Cantabria, 4  
organisations for which SSF ≤ 59%;  
for Madeira the unique fishing  
organisation: 59% ≤ SSF < 80%

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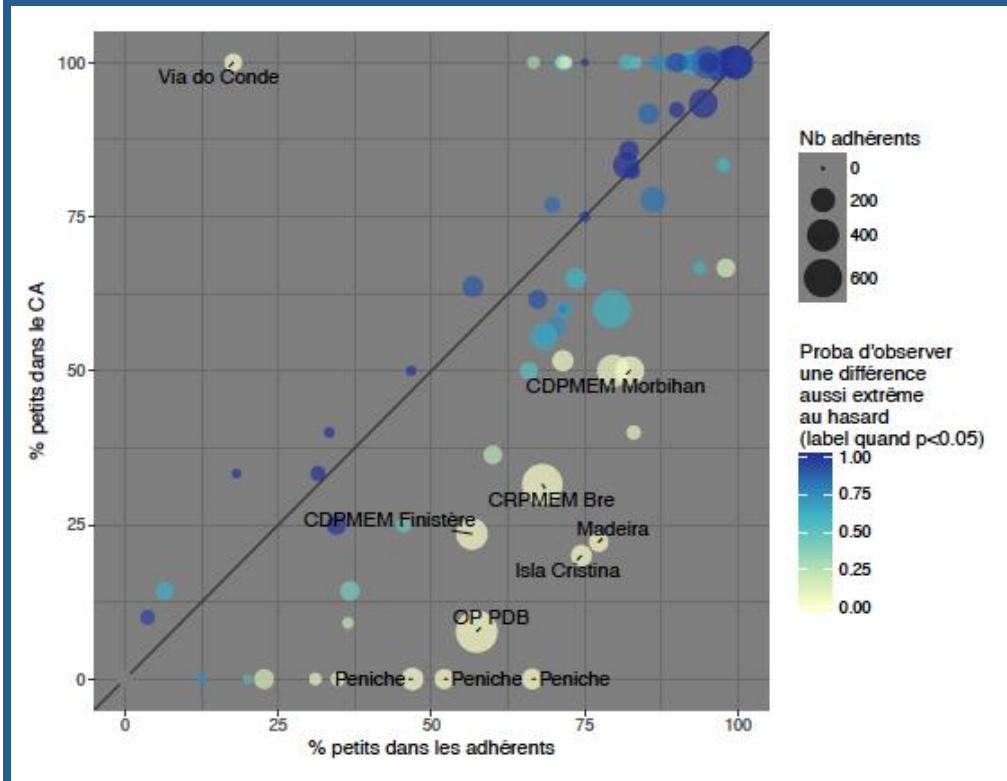
## Comments regarding last map:

- Organisations mostly representing SSF (SSF >95% of the membership) are present from Galicia Southwards
- The map should be seen having in mind both percentage of SSF in the region and number of organisations representing SSF in each region :

Region	% SSF	Number of fishing organisations with SSF members
Canarias	86%	29
Madeira	92%	1
Azores	85%	11
Andalously	54%	28
Portugal-South	92%	18
Portugal-Center	93%	23
Portugal-North	92%	21
Galicia	85%	72
Asturias	72%	19
Cantabria	33%	10
Spanish basque country	24%	18
Aquitaine	68%	4
Poitou-Charentes	82%	3
Pays de la Loire	80%	3
Bretagne	68%	4



### 3. Small-scale fishing fleet share management boards (considering number of members)

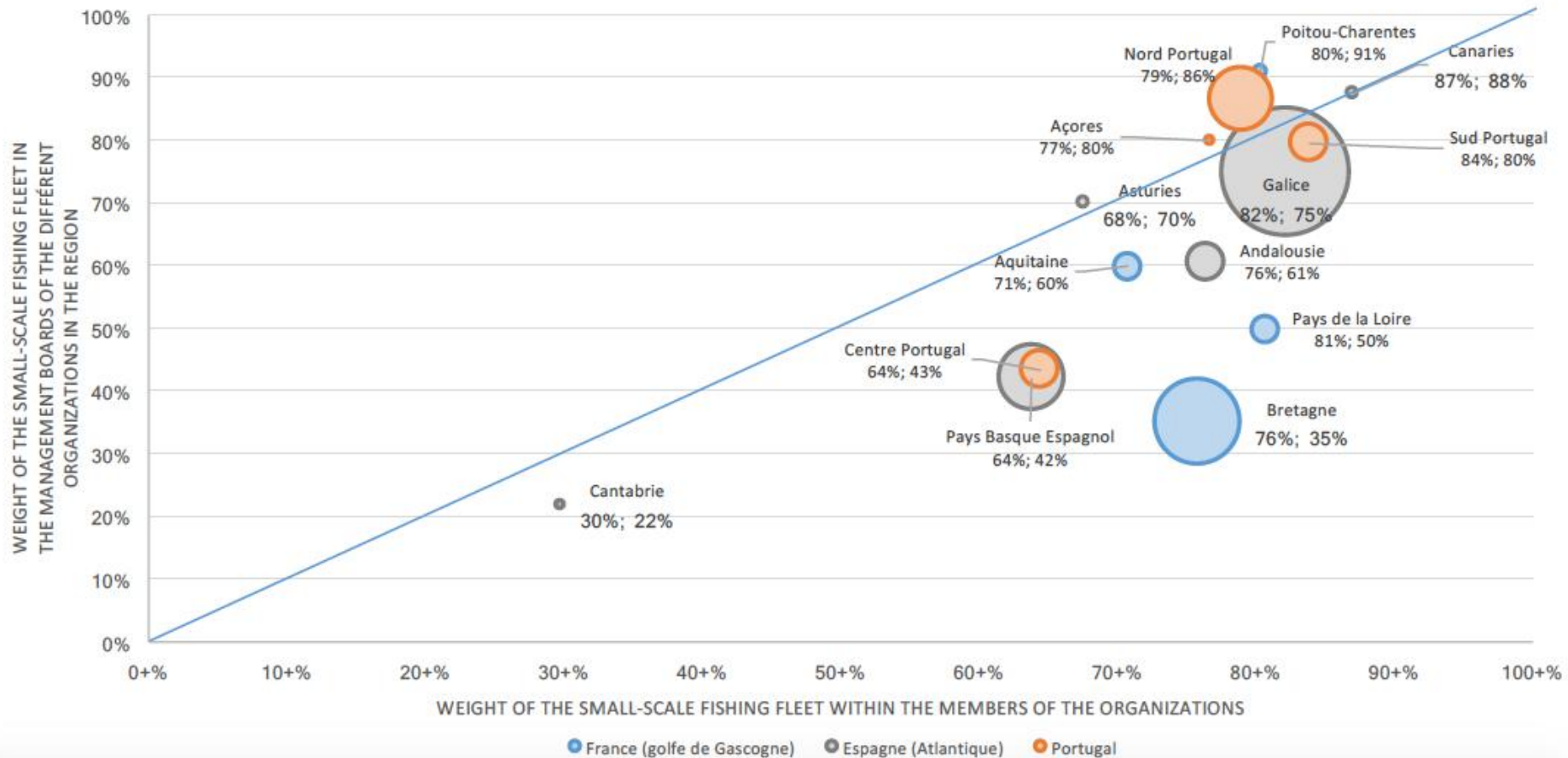


#### Are small-scale boats fairly represented within the fishing organizations?

Weight of the small-scale fleet in numbers within the members of the organization (x-axis), and percentage of board members from the small-scale fleet within the organizations (y-axis) interviewed. Line 1:1 is representing a faire representation (from a numerical point of view) of the small-scale segment within the management board. Size of the circles is proportional to the number of members within the organization.

From the figure, when the management board is **not representing adequately** the members of the organizations (points that are remote from the line 1:1), it is **often due to an under-representation of the small-scale boats**. The points, for which difference is statistically significant, have been named.

In the other cases, representation of the small-scale fleet seems adequate, yet the tests' capacity to detect differences depends on the number of boats. For organisations with few members, it is therefore hard to conclude anything. In organisations with many members but a small management board, the test will hardly detect an unbalanced representation.



**Diagram :**

X – axis: weight of SSF within the membership (%) = average percentage of SSF within fishing organisations (average percentages of SSF within the fishing organisations interviewed in the region)

Y – axis: weight of SSF within the management boards(%) = average percentages of under 12m ship owners in the management boards of the fishing organisations

Reading: on average, in fishing organisations that have been interviewed in Cantabria and count on SSF vessels, there are 30% of the members from SSF and they represent 22% of the sits within the management boards of these organisations

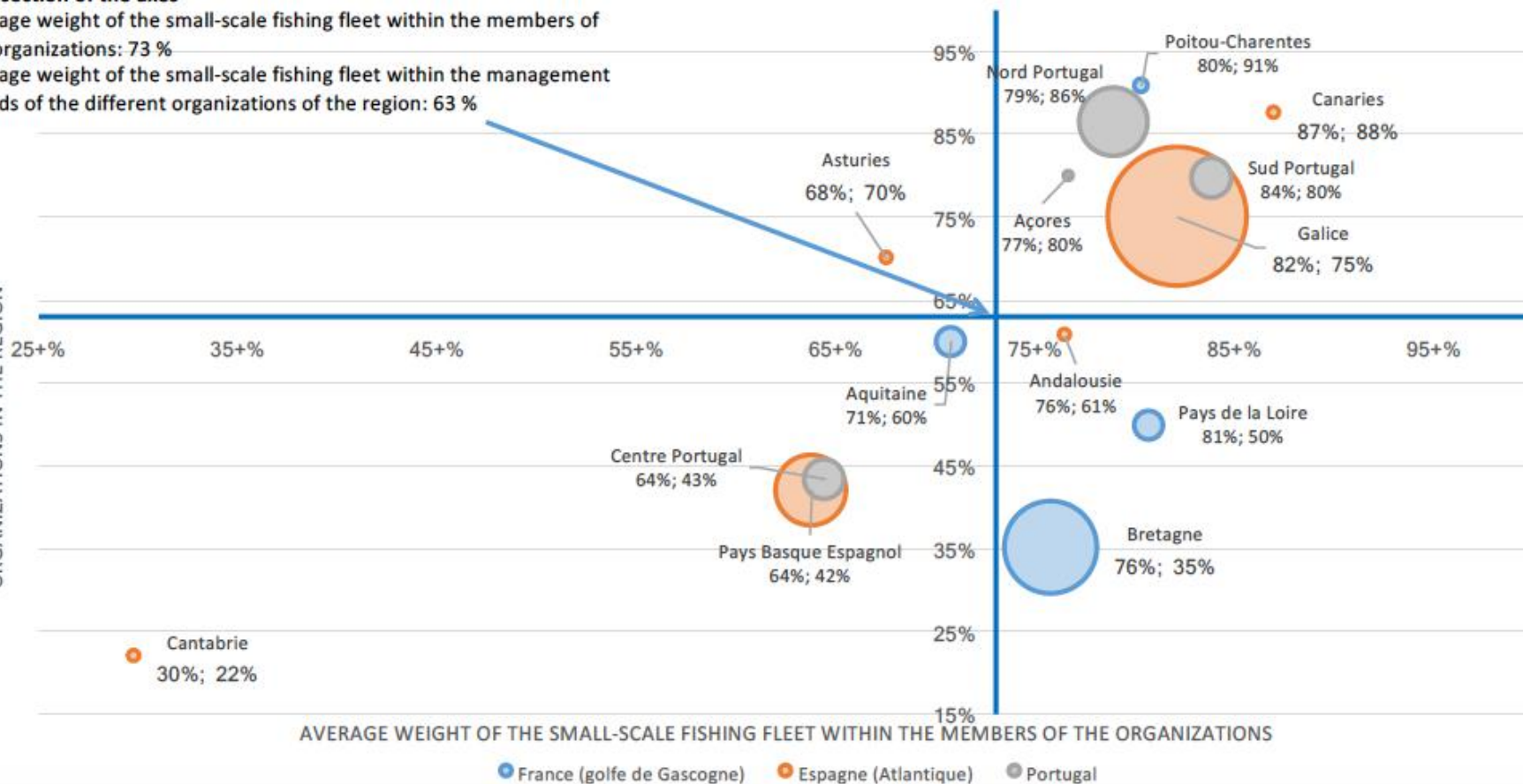
Marks' surfaces is proportional to the fleet total power (kW, from the community fleet register)

**Intersection of the axes**

Average weight of the small-scale fishing fleet within the members of the organizations: 73 %

Average weight of the small-scale fishing fleet within the management boards of the different organizations of the region: 63 %

AVERAGE WEIGHT OF THE SMALL-SCALE FISHING FLEET IN THE MANAGEMENT BOARDS OF THE DIFFERENT ORGANIZATIONS IN THE REGION



**Diagram :**

X – axis: weight of SSF within the membership (%) = average percentage of SSF within fishing organisations (average percentages of SSF within the fishing organisations interviewed in the region)

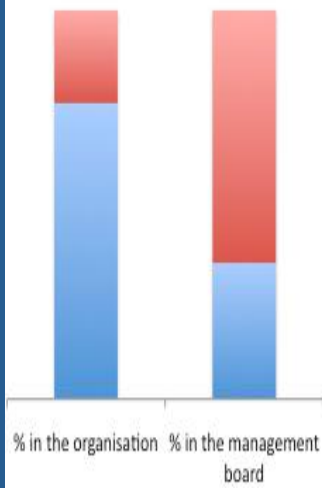
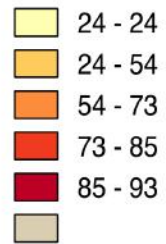
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Marks' surfaces is proportional to the fleet total power (kW, from the community fleet register)

# Small-scale fleet within management boards of fishing organisations

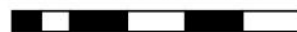
Percentage of small-scale fleet (in numbers)



Source: community fleet register and field interviews

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100 0 100 200 300 400 km

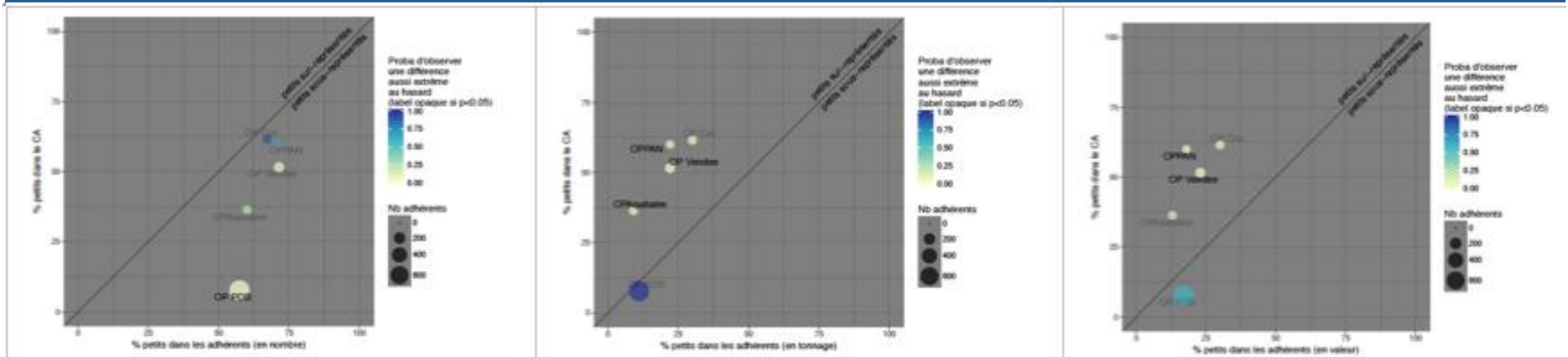


## Comments regarding last map

- The previous map is figuring the average percentage of SSF within the fishing organisations by region, and the average percentage of SSF within the management board of the fishing organisations (percentages have been calculated from data on membership from organisations interviewed during field interviews)
- It shall be read the following way, taking the example of Andalousia: in andalousia, SSF represents on average 76% of the members of the fishing organizations and 61% of the sits within the management board of the fishing organisations
- It shall be taken into account that the percentages are calculated based upon the number of SSF vessels compared to the number of vessels from other fleet segment. It is therefore not reflecting fishing effort and capacity where SSF has a smaller share of the whole.
- As shown from statistical test undertaken upon the membership's figures, there are some unbalances in some regions of the SWWAC's area: Madera, Center of Portugal, Brittany.



## 4. Small-scale fishing fleet share in management boards (considering economic criteria: landings in kg and €)



*Representation of the small-scale fishing segment within the management board of French producers' organizations. Left graph: considering number of boats. Middle graph: considering percentage of landings by the small-scale fleet (in tons). Right graph: considering percentage of landings of the small-scale fleet (in value).*

From figures above, it is very clear that whether **small boats are under-represented in numbers within these organizations, they are actually rather over-represented, sometimes in a significant extent, considering landings.** This criterion is of economic nature whether the first one is rather of social nature.

*Therefore, considering each vessel has one vote within the organization, it can be said that this numerical criterion for representation is at the advantage of the small-scale fishing sector, while a criterion about economic weight – which is implicitly being used by some POs - such as landings would prejudice the small-scale sector).*



## Few conclusions on the issue of representativeness of the small-scale fleet

Fishing organisations are usually representing various fleet segments, even if some organisations from Galicia southwards are almost exclusively representing the small-scale fleet (SSF share > 95% of the members)

The small-scale fishing fleet segment appears to be under-represented (considering the fleet's segments' number) in some organisations of SWWACs' area (mainly Centre of Portugal and Brittany). No clear conclusions can be statistically drafted for other parts but the representation of this segment seems to be balanced.

Through analyzing French producers' organisations' landings' figures, this fleet segment would be over-represented if considering economic criteria (landings in tons and euros)

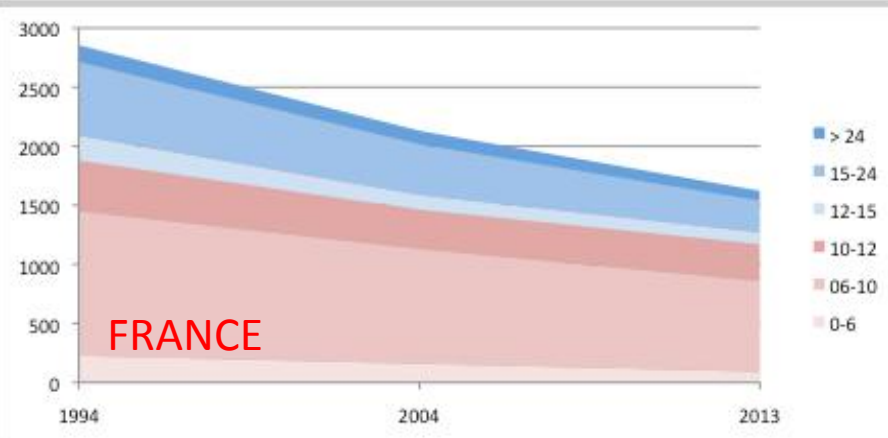
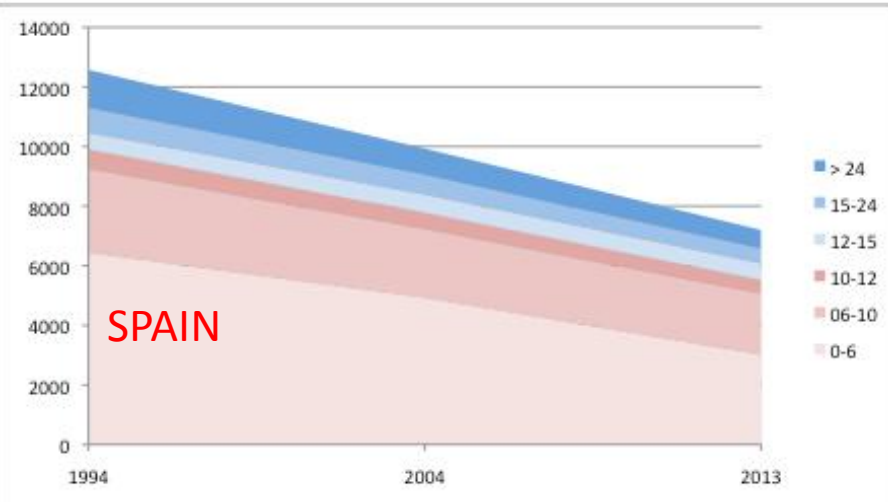
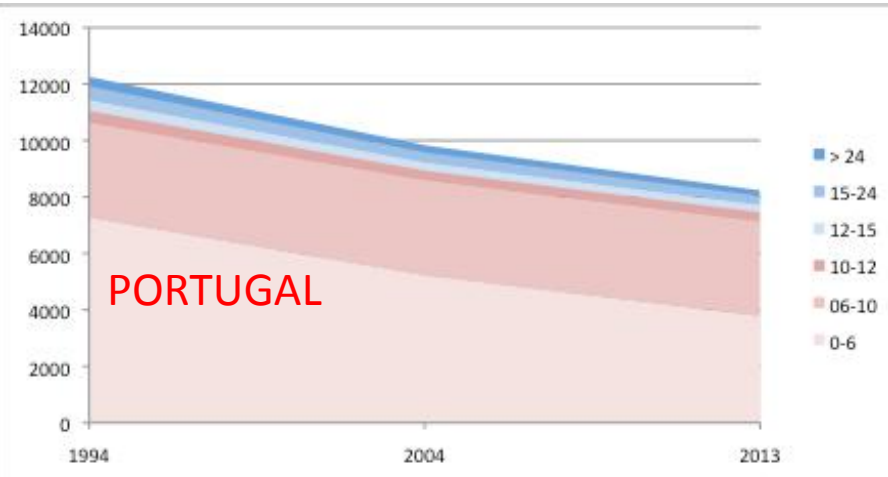
However, considering number of seats within management boards is insufficient to assess the influence of the small-scale fleet within the decision-making process. This aspect has been analyzed extensively through qualitative field interviews and complementary interviews with key people of the EU CFP.

# ANNEX 1 – Evolution of the fleet segments in the 3 countries (source: community fleet register)

Portugal	0-6	06-10	10-12	12-15	15-24	> 24
1994	7276	3363	412	392	478	337
2004	5230	3374	330	302	347	252
2013	3786	3350	316	276	298	206
<b>Variation</b>	<b>-48%</b>	<b>0%</b>	<b>-23%</b>	<b>-30%</b>	<b>-38%</b>	<b>-39%</b>

Spain	0-6	06-10	10-12	12-15	15-24	> 24
1994	6439	2803	663	550	842	1277
2004	4925	2301	558	600	665	883
2013	3012	2044	467	550	501	624
<b>Variation</b>	<b>-53%</b>	<b>-27%</b>	<b>-30%</b>	<b>0%</b>	<b>-40%</b>	<b>-51%</b>

France	0-6	06-10	10-12	12-15	15-24	> 24
1994	227	1224	428	211	625	141
2004	159	972	333	124	429	114
2013	92	767	312	98	270	83
<b>Variation</b>	<b>-59%</b>	<b>-37%</b>	<b>-27%</b>	<b>-54%</b>	<b>-57%</b>	<b>-41%</b>



SOURCE :  
community fleet register

In all 3 countries the fleet segment 0-6m has been divided by 2 in the last 20 years.

Looking at the most stable fleet segment, we can notice the following :

- In Portugal, the 6-10m fleet segment (including “pesca local” whose vessels are under 9m) has been stable in the last 20 years.
- In Spain, the 12-15m fleet segment has been stable in the last 20 years.
- In France, the 10-12m fleet segment has been reduced by 27% in the last 20 years but stable from 1994 up to 2013 which tends to indicate a restructuration of the under 12m fleet segment towards bigger under 12m boats.

# ANNEX 2 –Portuguese Pos membership (source : DGRM)

ORG_PROD	2012		2012 Total	2013		2013 Total	2014		2014 Total
	COMP <12m	COMP >=12m		COMP <12m	COMP >=12m		COMP <12m	COMP >=12m	
OP_1	10	1	11	9	1	10	8	1	9
OP_2	140	12	152	155	13	168	166	14	180
OP_3	49	38	87	52	42	94	53	42	95
OP_4	23	20	43	21	24	45	19	23	42
OP_5	6	13	19	6	12	18	5	11	16
OP_6	14	5	19	13	4	17	15	4	19
OP_7	107	50	157	105	47	152	96	43	139
OP_8	16	12	28	17	12	29	16	12	28
OP_9	82	32	114	80	33	113	83	36	119
OP_10	48	53	101	51	54	105	55	51	106
OP_11		20	20		20	20		20	20
OP_12		13	13		12	12		12	12
OP_13	330	84	414	313	82	395	310	86	396
OP_14							2	26	28
OP_15							41	29	70
OP_16							98	19	117
IN-OP	825	353	1 178	822	356	1 178	967	429	1 396
SEM_OP	2 049	87	2 136	2 019	79	2 098	2 404	101	2 505
<b>Total Geral</b>	<b>2 874</b>	<b>440</b>	<b>3 314</b>	<b>2 841</b>	<b>435</b>	<b>3 276</b>	<b>3 371</b>	<b>530</b>	<b>3 901</b>

Main point is that only 29% of under 12m boats do belong to POS whereas 81% of >12m are members of these organisations.