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EEC Fisheries: problems and prospects for a Common Policy

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EXECUTIVE SUMMARY

Years of fruitless negotiations towards a Common Fisheries Policy for the European Community have done little to stabilise fishing incomes, brake rapid inflation of retail fish prices or prevent deterioration of relationships with non-EEC fishing nations. It is against this background that the following report has been prepared.

What has become increasingly clear is that the delay in settlement of the fisheries dispute is due largely to the lack of true political will on the part of the EEC member states. This is evident from the fact that, despite two undertakings since the beginning of 1980 from the highest level to reach a settlement, the ministers are still a long way off reaching a satisfactory agreement.

The political dispute over quotas and access to coastal fishing grounds has dominated the issue for over five years and the report tries to give a comprehensive view of the background to the dispute in the hope that it will provide an accurate picture of the issues at stake. For this reason the report includes not only a summary of political developments in the EEC over the past ten years, but also an analysis of developments worldwide which have drastically changed the operations of the fishing industry, especially since the introduction of 200-mile zones. In turn, the effect this has had on trade, prices, employment, processing and catching is also described for each member state. The attempts to come to terms with these changes, at both member state and EEC level, are also summarised.

Against this background, the report evolves into an analysis of the ways in which various instruments could be employed within a common policy: restructuring of the industry, licensing, and markets and social policies. It describes the attitudes the member states have taken to these concepts and discusses how, or if, they are likely to be integrated into a CFP.

The main conclusion of the report is that the Community clearly needs a fully integrated policy of the kind which the Council has still to consider in depth. A partial agreement based on a series of compromises would show yet again that 'Community' policy is created on the principle of the lowest common denominator - short term national political interest is put before long term Community interest and short term losses will not be countenanced even for long term gain.

The report points out the growing divergency between the protectionist nations - especially France and Britain - and those favouring more liberal import regimes, mainly to supply their processing industries - Denmark and Germany. It says that the increasingly protectionist line on imports from third countries which is being taken by France - where the consumer has less influence than in some other EEC countries - is in line with French philosophy on the Common Agricultural Policy which traditionally protects the small producer.

On market organisation it considers to that the policy could be a good deal less liberal in its international trade aspect than might be desirable. Political concern in France and the UK over employment and, to a lesser extent, fishing incomes, would be behind such an approach but it would do little to provide the basis for a

rational long term solution. The report fears that a protective market policy would go hand in hand with a less than drastic programme of badly needed structural reform. Germany, in particular, is opposed to lavish EEC spending on a general structural policy, although Bonn might take a more lenient line if the Ten were able to agree on a ceiling for Germany's net payments, and is likely to oppose laying-up premiums which are favoured by the French when scrapping premiums represent a much more effective instrument for altering capacity.

The report does not expect any ultimate agreement between the Ten on quotas to be significantly different from those last proposed by the Commission but it suggests that inevitable TAC variations could result in an annual row over the share-out not dissimilar to the long disputes over annual farm price reviews by the agriculture ministers. A trade-off on quotas/access is regarded as almost inevitable and the report suggests that it is probable that a degree of preference will be established for dependent areas.

The report says that the outlook for a rational long term agreement is not favourable. It can never be expected that the machinery will run smoothly once a policy is settled, since there are numerous areas where national interests can be reconciled only with a great difficulty and with short-term sacrifices which no member state is willing to contemplate for the sake of an effective Community fishing industry in the long run. And yet the member states have tried repeatedly, and failed, to formulate a policy which avoids them having to make such sacrifices. This is clearly unrealistic, and can only lead to the worst kind of policy, one which will be no remedy for the problems currently facing the fishing and related industries. It would, instead, result in the Community being burdened with a policy which is costly, ineffective, ignores consumer interests and fuels further intemational opposition to the policies of the EEC in general.

The problems which will be posed by the enlargement of the Community with the accession of Spain and Portugal are considered and the report provides an outline of guidelines for an effective CFP. This section deals with quotas, market organisation, structural policy and licensing. It concludes by stating that a CFP is not all that can be done for the fishing industry. Much more could be achieved without external inducement. Investment has been held up because of failure to agree a CFP but other changes could have been made and still should be made.

SUPPLEMENT TO AGRA EUROPE SPECIAL REPORT ON EEC FISHERIES

Shortly after this special report was completed in mid-September, 1981, several developments occurred in the context of the EEC negotiations towards a Common Fisheries Policy. Although the decisions reached at the September 30, 1981 Council of Fisheries Ministers do not seriously affect the arguments presented in this report (and in many cases were foreseen at the time of writing), it has been decided to insert this brief summary of those decisions in order to bring the text into line with the current situation (mid-October 1981).

As had been thought possible, the British delegation finally abandoned its insistence on simultaneous agreement of all the elements of the fisheries policy, and proposed that the markets dossier be agreed immediately in conjunction with agreement on the EEC-Canada fishing agreement.

New system of withdrawal prices

A new and more flexible system of withdrawal prices is to be adopted, which falls roughly in line with the proposals outlined in this report. Producer Organisations will be allowed to withdraw fish within a range of -10% to +5% of the official EEC withdrawal price and still receive EEC reimbursement of moneys spent on withdrawal.

The system of degressive EEC financing of withdrawals has also been adopted, whereby EEC refunding of POs will be cut back as the amount of fish withdrawn increases: on the first 5% of the annual catch of any species withdrawn 85% of the official withdrawal price will be re-imbursed; between 5 and 10%, 70% of the withdrawal price; between 10 and 15%, 55% of the withdrawal price; and between 15 and 20%, only 40% of the withdrawal price. Beyond that there will be no EEC financing of withdrawal. Hopefully such a system should encourage POs to plan stable supplies of fish and to look beyond the quayside as the main factor in determining sales income. However, autonomous withdrawal prices will still be allowed (without EEC finance); but since these are funded by fishermen themselves, extensive sales into this private intervention would be self-defeating (unless carried on by the less efficient units in the fleet at the expense of the more efficient).

What has been hailed as a major advance is the approval of short-term processing "carryover" premiums - short-term storage and basic processing of fish for storage would be partially financed by the Community in times of temporary glut of valuable food fish species (e.g. during the summer months when demand is at a low ebb). However, it is uncertain how many of the recognised POs have the facilities to take advantage of the scheme.

As pointed out in the main text of the report, little has been done to tighten up quality control on fish, and there are fears that without these checks the carryover-funded stores could end up as a dumping ground for poor quality fish.

A special scheme was adopted for withdrawal of sardines and anchovies, principally in Italy, where there exists a considerable problem of market disequilibrium.

More flexible reference price system

As expected, under the new measures it should be possible to enforce respect of the import reference price much more quickly than under the old legislation. Processors had feared that, had the proposals been adopted unchanged, stable supplies and prices of imported raw material could have been disrupted at the slightest sign of fish entering the Community at marginally less than the reference price.

Although the protectionist attitudes of France and the UK were particularly prevalent in the discussions, international trade agreements did necessitate some modification of the proposals. For example, the import price (which would be used to calculate the price of imports vis-a-vis the reference price) will be based on the free-at-frontier price (FFP) plus the real incidence of Common Customs Tariff (CCT) applied to the imports and not on the FFP plus the full CCT. This change was necessary because of the various trade agreements whereby some third countries are allowed to supply tariff quotas of fish at less than the full CCT.

Likewise, respect of the reference price will not be automatically enforceable. Under the original proposals there would have been more or less automatic enforcement of the reference price when "proof" was available that the internal market was being adversely affected by imports. Under the system finally adopted a measure of discretion is left with the EEC Commission. Following evidence of market disturbance the Commission does not necessarily have to enforce respect of the reference price (since this could clash with GATT undertakings), but it does have to decide within three days whether or not it is going to act and what action it is going to take.

Other supplementary changes to the markets regime included removal of herring imports from the list of quasi-automatic suspensions of the CCT. The main reason behind this was to re-vitalise demand for herring caught from the newly re-opened EEC herring fisheries. This, however, does not mean that some kind of temporary suspensions of the customs tariff will never again be implemented.

In addition, proposals to introduce reference prices for lobster and salmon were dropped. Such a move could well have attracted trade retailisation from the US, and it was decided in the end to opt for a system of deficiency payments for these two species. However, no final details on the extent of these payments has yet been reached, and there are still fears by third countries that a high degree of deficiency financing could impair the competitiveness of salmon and lobster exported to the Community.

Finally, funds were released for the 1981 tranche of the "temporary" scheme for the restructuring of the inshore fishing indus try, but no moves were made at this stage to adopt a more comprehensive restructuring programme.

Canada agreement still to be ratified

Although the Canada agreement has now been given the go-ahead by the EEC states, there has so far been no ratification of it by the Ottawa government. The refusal by the UK to ratify the agreement for so long was based on fears that cheap Canadian cod would swamp the UK while only the German deepsea fleet would benefit from regained access to cod grounds of Newfoundland and Labrador. This produced the linkage with the markets regime and in particular with the system of reference prices. However, the

linkage between the two elements has been just as apparent in Canada, and there have been suggestions by high ranking Ottawa officials that implementation of the new reference price system could fuel Canadian demands for renegotiation of the bilateral agreement.

Even if that is not the case, there seems to be little willingness on the part of the Canadian government to allow Germany to recoup its lost 1981 catch off Canada during the 1982 season, and ratification by Ottawa is not expected before late 1981. It still seems possible that there will be moves to prevent more than about 1 500 tonnes of Canadian cod shipped under the agreement entering the UK directly, but it would be impossible to prevent reshipments from other EEC countries. And even the limitation on direct access to the lucrative UK market might be cause enough for the Canadians to seek renegotiation of the deal, although currency shifts during 1981 have relieved the UK market of a great deal of the pressure from Canadian imports.

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1. EXTERNAL SITUATION

1.1 The unique economic position of fish

Before any meaningful analysis of the present position of the European Community's fishing industry and its development over the past ten years can be made it is pertinent to examine the economic nature of fish as a commodity.

From the point of view of economic theory fish is rather unusual, certainly when compared with other foods destined for mass consumption. What really sets fish apart from agricultural products is that despite the fact that the fishing industry has become highly industrialised and technologically sophisticated fish is still hunted. Although aquaculture and mariculture are playing an increasing role which contradicts this trend, all but about 8% of the world's fish production is still hunted in this sense.

A common resource

Fish can also be described as a common resource, again unlike the great bulk of agricultural products. It has to be hunted because it is a mobile resource and thus can move from one country's sovereign or jurisdictional waters to another's (the introduction of 200-mile economic zones does not change the essence of this theory). Thus in theory fish could be hunted by any coastal state.

However, this theory only fits the practice up to such a point where the level of hunting or its improved efficiency begins to threaten the longterm survival of the species in question. This involves another unique characteristic of fish as a commodity - it is a renewable resource. The parallel with hunting on land is inevitable - hunting continued long after the establishment of agriculture up to the point where the hunters outnumbered the hunted, and many endangered species survive today only through strict control of hunting and through conservation measures.

And it is the latter situation which the fishing industry has achieved over the course of the 20th century, with the world catch running to about 75 million tonnes annually. Improved fishing gear; larger and increasingly higher-powered fishing vessels opening up new distant water fishing grounds; the advent of large scale refrigeration opening up new inland markets; and increased prosperity making more income available for expenditure on protein foods have all been major factors in the expansion of catches this century.

Formation of ICES

The mobile nature of both the resource and the means of production showed early on the need for international cooperation as soon as it became apparent that over-fishing could endanger the breeding stocks of certain species. The situation has been most apparent for highly migratory species such as herring, salmon, the cetacean mammals and, more recently, mackerel, although the principle applies to a great many species for human consumption to a greater or lesser extent.

It was chiefly due to such considerations that the International Council for the Exploration of the Sea (ICES) was set up under its present constitution in 1968. This

initiative was in line with the establishment of international organisations to cover certain areas or certain species. Of these, the two which will be of greatest interest to this study are the North-East Atlantic Fisheries Commission (NEAFC), set up in 1963, and the International Commission for the North-West Atlantic Fisheries (ICNAF), established in 1950 and now transformed into the North-West Atlantic Fisheries Organisation (NAFO).

An in-depth analysis of the achievements of the international fisheries organisations is somewhat beyond the scope of this study, but suffice it to say that, with some exceptions, their constitutions have not always given them sufficient powers to ensure that their recommendations were complied with by member countries. In 1973 it was said "The North-East Atlantic Commission has not been as successful as the International Council for the Exploration of the Sea. In some fisheries it did not succeed in limiting catches to the level of maximum sustainable yield. As a result, several stocks have been seriously over-fished". 1)

Friction between countries

ICES, as noted, has been somewhat more successful, although in recent times its advice has also come under serious criticism, notably over the North Sea herring ban. ICNAF also proved to be rather toothless, and the late 1960s and early 1970s saw considerable friction between the USA and Canada on the one hand and some of the countries fishing in the ICNAF zone, notably the Soviet Union (whose activities were also cause for concern and mistrust in the North Sea and off Iceland). Regulation of haddock catches proved particularly difficult, and Canadian Fisheries Minister Romeo LeBlanc commented "One stock after another has been fished down". 2) Apart from the Soviet menace it is worth noting that in the North-West Atlantic catches by the EEC 9 in 1968 were 500M t but had fallen back to 140M t in 1974, despite an increase in fishing effort.

In these circumstances it became increasingly clear that one of the basic assumptions for the 'freedom of the high seas' - namely that marine resources are inexhaustible - had been overtaken and invalidated by the rapid advances in fisheries technology and intense capitalisation. The new fishing methods were not only more efficient, but also in some cases, such as purse-seining, more harmful to immature fish and the biomass in general. Thus it is scarcely surprising that those coastal states most concerned about depredation by industrialised foreign fleets of stocks just beyond their territorial waters began to consider possible methods of extending their control over quotas and stock management in those waters, mostly on the continental shelf and slope where biological and hydrological conditions produce the heaviest concentrations of fish.

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1) International Regulation of Marine Fisheries. A W Koers, 1973.

2) Geographical Magazine, October 1977. Peter Hjul.

1.2 The advent of the 200-mile zone

The real impetus towards national control of economic activity in a broader band of coastal waters - 50, 100 or 200 miles - only developed in the early and mid 70s but the idea itself had been considered, and in a few cases applied, much earlier. Chile, Peru and Ecuador had extended zones of this kind as far back as 1952, but discussions on a larger zone took on an international aspect through the 140 nations represented at the United Nations Conference on the Law of the Sea, which started in 1958.

Distant water fleets had most to lose

Although the situation in the northern Atlantic was far from ideal, the countries in that region were, in the late 60s, not yet ready to move towards larger zones or allocate greater powers to the international regulatory bodies. In political terms those profiting from the status quo outnumbered those who suffered. France, Germany, Britain and Spain had large distant water fleets operating off Canada, Iceland, Greenland, Norway and the Soviet Union, while the smaller European nations attracted little fishing activity from other countries; thus the main 'contributors' - Iceland, Canada and Norway - found themselves in the minority. Not surprisingly, the later initiative for larger zones in the North Atlantic came from them and not from the major distant water fishing countries.

However, before that certain countries along the west coast of Africa had laid part of the foundations for a system of larger zones. Lacking the facilities to carry out research on stocks or monitor fishing effort there had been a move towards cooperation, partly spurred on by the United Nations Food and Agriculture Organsiation (FAO). By the end of the 60s there was already intensive discussion and a reasonable body of written material on the implications of extended zones, within fishing circles, legal reviews and inside the UN.

Arguments against EEZs

But there was also considerable dissent on whether larger zones would be advantageous. On the economic side, arguments against their introduction were that distant water fishing fleets, which would probably be excluded from the new zones, were generally more efficient, were interested in a broader range of species than coastal fleets, and were more mobile and could therefore adapt to stock changes better than coastal fleets. It was also argued that exclusion of foreign fleets would take away the element of competition and encourage inefficiency. It could be argued that there would have been less controversy over the question of Canadian quality had not foreign fleets been kept out of Canadian waters. On the conservation side also there was disagreement with the concept of larger zones: naturally, the implementation and enforcement of conservation measures would probably be more efficient at national level, but migration of species would still present a problem, which would have to be overcome by series of bilateral accords. In addition, it was not in all cases self-evident that coastal states would do a better job of resource management than had the international regulatory bodies.

Strong national interests of coastal states

The global economic arguments obviously tended to lose out to arguments of national interest as far as individual coastal states were concerned. For countries or regions where fisheries generated employment and a large proportion of income the important thing was not only that stocks should be subjected to national management but also that a larger portion of Total Allowable Catches (TACs) could be allocated to the national coastal fleet in a broader economic zone. This argument was of particular relevance to countries such as Canada, Iceland and Norway, while developing countries with fisheries expansion programmes were also anxious to protect stocks from over exploitation by foreign industrialised fleets. It is worth noting that by 1980 existing or projected 200-mile zones covered 130M km^2, equal to 35% of world ocean area and 90% of land area. The zones contain about 95% of living marine resources.

Eventually the political and national economic arguments gained a strong footing, and when it became clear during the third UNCLOS session starting in 1974 that a majority of nations in the United Nations Conference on the Law of the Sea (UNCLOS) talks were in favour of 200-mile exclusive economic zones (EEZs) some of the interested countries began to implement the idea before it was adopted by UNCLOS (a wise decision in retrospect, since the UNCLOS charter has yet to be ratified, mainly because the new Administration in the USA is pressing for amendments on mineral rights). The manner in which the new zones were implemented created certain problems, and the 'cod wars' between Iceland and the United Kingdom will be discussed later.

Bigger catches for domestic fleets

Improved conservation was not the only motivation behind the move to larger zones; a greater part of quotas could also be allocated to the domestic fleet under the new arrangements. By 1977 the Organisation for Economic Cooperation and Development (OECD) noted "The tacit acceptance of the unilateral establishment of 200-mile fisheries zones has virtually put an end to multinational negotiations on partition of catch and in their place is a proliferation of bi-national negotiations with, as a rule, the coastal country determining the share to be allowed to the second party, a telling influence usually being the latter's bargaining strength rather than traditional or similar claims"1). By the end of 1979 OECD re-inforced this - "a pattern of diminishing allowances to foreigners by the coastal states had become well established for major fisheries, with the exception of those for highly migratory species." 2)

Slow progress on longterm agreements

Before long, the negotiation of fishing rights had adjusted to the new regime, but progress towards longterm arrangements was not so rapid. Again in its 1979 report on fisheries the OECD stated; "it could be imagined that a more rational longterm economic development would transpire. In fact, it cannot be said that, where the sharing of zonal stocks is concerned, forward planning covers more than a year; often it is less." 2)

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1) OECD Review of Fisheries, 1977

2) OECD Review of Fisheries, 1979

Iceland sets example

What was remarkable, even if inevitable, was the way in which the concept of 200-mile zones, which at the beginning of the 70s was no more than a discussion point in the still unratified UNCLOS text, had by 1977 been implemented by all the major fishing nations of the North Atlantic. A number of elements were responsible for this rapid growth. Although the OECD commented that "the situation is a curious one, and unusual in international law; a draft convention which is still only in the preparation and discussion stage has already been put into application unilaterally in most of the major fishing countries", there can be little doubt that the Icelandic initiative of 1974 paved the way for general introduction of the principle.

In addition there was a certain snowball effect; once one country with major fishing grounds such as Iceland had established a larger zone, there was the fear that displaced distant water fishing vessels from other nations such as the Soviet Union and Eastern Europe would be increasingly deployed in those waters where a 200-mile zone had not been established, e.g. the North Sea. In addition, the implementation of 200-mile zones had 'robbed' distant water fishing nations of a portion of their supplies which they were intent upon recouping from waters nearer to home, and at least some of that fish could be made available without damaging stock levels by excluding foreign industrial fleets from waters nearer to home. The effects of this change on EEC catch by fishing area, vessel type and species will be apparent from subsequent chapters. The introduction of an EEC 200-mile zone in 1977 was due partly to the factors listed above and partly to the unusual political situation regarding Iceland, the UK and the Community as described below.

1.3 The Icelandic cod wars

Given the emotive view of the fishing industry held by the general public and the often chauvinistic reports which appeared in the press at the time it is not easy to provide an objective view of the developments between 1972 and 1976 concerning the so-called "cod wars" between Iceland and the UK. In 1972 Iceland announced its intention to expand its fisheries zone to 50-miles from the existing 12-miles, which had been agreed in 1962. Iceland was the first country in the North-East Atlantic to make such a move, although it was clear that any future negotiations on the international law of the sea would focus on the expansion of economic zones.

With Iceland dependent on fisheries for 80% of its export earnings at that time is is scarcely surprising that the country was the first to take the legal plunge. Equally, it was not surprising that the British government did not take kindly to the move - British catches in the disputed waters represented around half of UK demersal landings from distant waters and 20% of all UK landings of fresh and frozen fish.

Appeal to International Court

Both Britain and Germany applied to the International Court of Justice for an injunction maintaining the status quo while negotiations would be carried out on interim arrangements which would last until the Court gave its final judgment on the legality of Iceland's declaration of a larger zone. As far as the letter of the law was

concerned Britain and Germany were in the right and Iceland in the wrong. Under a former agreement they should have been consulted by the Icelandic government to establish new arrangements following from any expansion of the Icelandic fishing zone. Meanwhile the Icelanders did not recognise the authority of the Court to deal with the matter. This was probably a wise move, since international justice works extremely slowly - international consensus was slowly working towards acceptance of larger zones, and recognition of the Court could have speeded up the legal process and resulted in a judgment against Iceland before that consensus had come round to supporting the Icelandic case in practice, even if the Icelandic move had been in breach of the letter of the law.

Court injunction ignored

The injunction was granted by the Court, but Iceland went ahead with introduction of the 50-mile zone. An offer was made by Iceland to the UK on the basis of which during the interim period British catches would have been cut to 75% of the British 1971 catch. Other stipulations were included on vessel size and number and on the introduction of boxes, but these and similar offers were all rejected by the UK.

Early on it was implied in the British House of Commons that Royal Navy support could be offered to protect British vessels in the disputed area, and this cannot have helped the British negotiating position. The Icelanders were aware that time and, increasingly, international opinion were on their side. Meanwhile, the EEC intervened on behalf of the UK and Germany by blocking implementation of tariff reductions on imported Icelandic fish.

Belgium and Norway take different approach

Countries which carried less international political weight than the UK had, however, succeeded in settling interim deals with Iceland which did secure catches accepted by the Icelandic government, even if the amounts were reduced; the main countries involved here were Belgium and Norway. The essential difference between their approach and that adopted by the UK was that they chose to avoid any specific recognition or contention of Iceland's right to enlarge its fishing zone, whereas the British opted to embark on a lengthy case in the International Court whose judgment was in any case very likely to be overtaken by international developments within a matter of two or three years. Without recognising the new zone itself Belgium, for instance, agreed to restrict its operations within certain boxes within the 50-mile zone. This pragmatic arrangement was described by a Belgian negotiator at the time as "a purely practical arrangement". Thus Belgian vessels were fishing unharassed in the new zone without any severe international friction or costly flexing of military muscle.

At the same time the Norwegian fishing industry, aware that sooner or later there would be a worldwide move towards larger zones, induced the government to negotiate a reasonable agreement with Iceland without pressing for concessions which Iceland would not accept. Admittedly, the Norwegians as fellow Members of the Nordic Council stood in greater favour than the UK (all the member states of the Nordic Council supported Iceland's need to expand its fishing zone).

NATO ploy proved decisive

In 1973 Iceland began to put to use its negotiating advantage as a strategic NATO base, a ploy which in the end was to prove decisive in the final round of the cod war in 1976. Use of Icelandic airbases by UK aircraft was halted by the Icelandic government. A German offer to the Icelanders which tacitly accepted the Icelandic approach to larger zones was welcomed by Reykjavik. In the end an interim agreement between the UK and Iceland was reached in November 1973, effectively limiting the UK catch to about 130 000 tonnes.

However, the calm which followed was short-lived - in July 1974 the International Court ruled against Iceland on the introduction of the 50-mile zone. Iceland, of course, ignored the ruling, saying that the court was out of touch with the times, and promptly announced plans to go for a 200-mile zone.

British government slow to move

It was at this point that the British government would have done well to adopt a position more in line with developments at the UNCLOS talks. David Ennals, then Minister of State for Foreign and Commonwealth Affairs, who had represented the UK at the UNCLOS session, said that there had been a general move towards acceptance of 200-mile zones. De facto, the International Court ruling of the previous year had become obsolete.

With Canada, the United States, Norway and Iceland all now clearly committed to the concept of a 200-mile zone, the UK should have begun thinking seriously about what line should be adopted on this as far as negotiations within the EEC were concerned. Hitherto, the British and Irish had had broadly similar attitudes to increased zones. Both were concerned to assure largely exclusive fishing rights for their inshore fishing fleets. However, the history of the Iceland-British dispute resulted in a parting of the ways.

UK forced to agree to low TAC

In June 1976, Iceland, playing its NATO card to the greatest advantage, had wrung from the UK an agreement for a UK catch of about 30 000 tonnes, much lower than all the previous offers which the British government had refused. Also included in the agreement was the condition that further arrangements would be negotiated with the EEC and not with individual member states, and that a prerequisite to such talks would be the establishment of an EEC 200-mile zone. This was another step towards British defeat in Europe.

The UK was committed to a 200-mile zone (often referred to thereafter as the "Community pond"). Ireland was not so rigid in its negotiating stance, and continued to hold out for exclusive rights within 50 miles. After having blocked the introduction of an EEC 200-mile zone once in early October 1976 (thus leaving the way open for Eastern European and Soviet vessels displaced from Iceland to move into the North Sea unimpeded), a further meeting of EEC Foreign Ministers resulted in what has become known as the Hague agreement of October 1976 (see **Section** 15). Concessions offered by the rest of the EEC member states at that meeting aimed at solving both British and Irish problems simultaneously. But the British, obsessed with the need to

reach agreement with Iceland, failed to secure assurances as concrete as those given to the Irish Republic (see Chapter 15 - The Hague Agreement).

Britain rejects unilateral action

Britain's case had been weakened by two factors. First, while having continued to demand rights within the Icelandic 50-mile zone, Britian was demanding exclusive rights within a 50-mile zone of its own, and in terms of economic dependence had much less right to do so. Secondly, it had vetoed a NEAFC move for a North Sea herring ban (adopted a year later) which was supported by Iceland, thus reflecting badly on the UK's critical attitude to the conservation arguments put forward by Iceland for a reduction in foreign fishing effort in Icelandic waters.

It is surprising that under a Labour government much less publicly committed to the European cause Britain had not earlier gone for a unilaterally declared 50-mile exclusive zone. Apart from the failure to gain or even demand any concessions on fisheries during the renegotiation on EEC membership during 1974-75, it is indicative of the British government's incompetence on international fisheries affairs that it formally rejected any unilateral move, the only action that would have resulted in a more favourable longterm outcome; having condemned the economically justifiable action by Iceland, it steadfastly refused to adopt a similar course of action which could have helped the British fishing industry in later negotiations with the EEC. Again, David Ennals, referring to the demand by British fishing organisations for an exclusive 50-mile zone, said when commenting on UNCLOS talks, "to take any unilateral action would be contrary to the position we have adopted in this conference ... the rights of British fishermen would be better protected by the 200-mile economic zone concept which Britain strongly backs ... it is in the British interest to secure this by international agreements rather than by unilateral action which could provoke retaliation and severely damage the livelihood of British fishermen."

Britain not prepared to copy Iceland

Iceland had risked retaliation for the sake of its fishing industry. Britain's government of the day was unwilling to follow in the steps of a country which had beaten it on the fisheries issue, and the meagre fruits of that indecisiveness are being harvested during the present EEC negotiations on a Common Fisheries Policy.

Far from justifying British action on the fisheries dispute with Iceland, a retrospective statement by the then British Foreign Secreatry, Anthony Crosland, only succeeded in highlighting the failure of the government to understand what was happening in international fisheries. "It has been clear for some time to all thinking people, even if not to the more backward sections of the trawling industry, that in a world of 200-mile zones the industry must face a major adaptation. The distant water fleet will decline, the inshore and near-water fleets expand. The painful change would have had to occur anyway, whether I had signed this (Iceland) agreement or not". Had the British government realised that sooner, perhaps Britain would be in a stronger position in the present negotiations with its EEC partners.

2. FLEET DEVELOPMENT IN THE EEC

2.1 EEC in general

Given the fact that catch and consumption patterns in the various member states have traditionally varied widely, it is hard to generalise on fleet developments over the past decade and still retain an accurate picture. Some external factors - notably the increase in oil prices - have had a roughly comparable effect in most member states of the Community, but others, such as the move by coastal states throughout the world in the mid-70s towards 200-mile EEZs, have had a varying degree of impact on them. Differing rates of change in income, inflation and the economic climate have also had varying effects which are harder to correlate.

Big cut in distant water fleet

In the EEC as a whole the main changes have come through cutbacks in the distant water and high seas fishing fleets and the countries principly affected by this have been the UK, Germany, France and Belgium. EEC vessels of over 500 GRT have reduced in number by 29% and in tonnage by 21% during the 1972-78 period. This reduction has resulted not only from the loss or diminution of fishing opportunities in distant waters but also from steep cost inflation for this type of vessel, particularly the fuel bill (see also Section 5 on fuel costs).

But for near and middle water vessels costs have also escalated, and as a result there have been intensive efforts to increase yield per vessel. This has been reflected particularly in the ratio of engine size:tonnage, which for the Nine rose by 19% between 1972 and 1978.

The direct impact of the escalation of fuel prices in 1973-74 can be seen in the development of the deepwater fleet. Immediately before the fuel price increase there had been a period of heavy investment aimed at taking advantage of technological innovation. This also stemmed from, and was partially financed through, the favourable price/cost ratio which had marked the 1968-73 period, the EEC Commission notes.

Interest rates affect investment

The mid-70s marked the beginning of a period of slower economic growth and higher inflation (also due not least to the energy crisis), which resulted in higher interest rates in many member states and uncertainty about the viability of largescale investment in the prevailing economic climate.

These factors, linked with the loss of distant fishing opportunities, stimulated interest in inshore fishing, and government and EEC policies have offered financial incentive for this sector, despite the economic limitations on the size of concern.

The absence of a Common Fisheries Policy itself has also been cited increasingly in the recent past as a disincentive to investment. The uncertainty about longterm national quota availabilities and the failure of the Community to establish an effective mechanism for controlling the increasing flow of cheap imports from third countries to

some EEC markets have slowed down investment in some member states, particularly for larger vessels. On the other hand, some countries have injected cash into the industry either through loans or grants in order to help fill the investment gap, ostensibly to encourage restructuring and maintain suitable capacity for such time as a common policy is in operation.

Smaller vessels modernised

Some general trends can be recognised. In most member states there has been a move to increase fishing effort and improve efficiency in the smaller vessel categories. Engine size/tonnage has increased and older vessels have been phased out or modernised or the proportion of newer vessels has increased. Prohibitive investment costs for larger vessels have helped this trend, and rising fuel costs have made close-to-home fishing grounds increasingly attractive. What is most apparent is that modernisation has been concentrated in this one category of vessels. With the exception of the Netherlands and perhaps Denmark little attention has been paid to modernising larger vessels.

Nor has the growth of one sector of the fishing fleet really brought capacity into line with available resources. Many authorities, and not only those representing the views of owners of larger vessels, feel that there is gross over-capacity in the EEC fishing fleet in general and that this is one main factor behind the failure of the EEC fleet's catches to compete with imports of whitefish. Some estimates put over-capacity as high as 30% of present capacity, and higher still in certain categories.

Larger vessels have some advantages

Although the coming of 200-mile zones highlighted the disadvantages of larger vessels and favoured investment in smaller craft, it is argued that there is still a place for medium-to-large vessels. Several points are cited in their favour. They have larger on-board storage, freezing and primary processing capacity; this means that less time is spent on non-productive fuel-thirsty sailing from port to fishing ground and back. In addition, organised catches from such vessels with relatively large storage capacity could help to stabilise quayside prices, although it is also argued that improved operations on the part of Producer Organisations could achieve the same end.

Large vessels also are able to withstand the harsh weather conditions which are typical of many regions of the North-East Atlantic and which make operations for smaller boats not only dangerous but less profitable. The higher power of large vessels also gives them deepwater trawling capacity and the ability to handle more effective gear. Finally, they should be able to operate with less manpower per unit catch.

In-shore vessels win on quality

It has, on the other hand, been argued that the quality of fish landed from such vessels is not as good as that landed fresh from inshore vessels. This reasoning has been prevalent in France in particular, where the consumer tends to demand high quality fresh fish. This the inshore fleet is able to supply and sell at premium prices because of the quality advantage (the generally lower average prices at an industrial port like Boulogne also reflect this argument). But where a large proportion of fish is for processing, as in the UK, the relative advantage of good quality fresh fish is perhaps of lesser importance.

On the other hand, it has been said, by the Irish in particular on the subject of premium species such as herring, lobster etc., that especially during a period of economic recession consumer and processor alike are unwilling to pay premium prices for quality fish and for this reason have turned to imports of inferior quality from Canada, Iceland and Norway. Germany, for example, imports large quantities of cheap hake for processing, and one small-scale consumer pilot survey in the Netherlands even suggested that the consumer preferred fish fingers made with blue whiting to those made with cod (although the absence of differentiated packagings eliminated the element of consumer resistance to new species which has been very hard to overcome so far, with perhaps the exception of mackerel).

Dutch moving in right direction

In some ways the Dutch fleet has moved slowly towards the establishment of a fleet which meets some of the requirements outlined above. Many larger, efficient and increasingly multipurpose vessels have been built aimed at reducing manpower costs and able to operate on different fisheries according to season and demand. On the other hand, there are now fears at the highest level in the Netherlands that capacity is growing dangerously large and so efficient as to threaten stocks. Also, the Netherlands does not have an acute problem of regional dependency on fishing, so the impact of rationalisation plays a lesser role in policy guiding fleet development. Nor, of course, is the Dutch solution ideal for the fleets of all EEC countries. One study for the UK carried out by the White Fish Authority shows that the most drastic overcapacity is in the very smallest vessels (under 12m) and in the largest deepwater trawlers (over 42m). Changes in the vessels in between these two extremes would not need to be so drastic, although cuts would be needed in vessels in the 12-20m range.

Table 1. Tonnage of the EEC-10 fishing fleet in 1979 (Motor vessels)

	0 - 25 GRT	25 - 50 GRT	50 - 100 GRT	+ 100 GRT	Total	- Sources - Comments
Germany	4 180*	7 033*	7 467	99 976	118 656	OECD - Draft 1979 * Estimate of breakdown 0 - 50 GRT
Belgium	99	2 329	5 217	12 391	20 036	SOEC provisional
Denmark	36 876	30 265	16 635	62 518	146 294	ICES 1977
France	48 578	38 282	9 322	102 197	198 379	SOEC provisional
Ireland	5 408	4 982	10 461	7 356	28 207	SOEC provisional
Italy	93 178	55 378	42 124	111 918	302 598	SOEC provisional
Netherlands	1 823	6 484	13 487	62 080	83 874	SOEC provisional
United Kingdom	42 682*	27 687*	21 858	134 479	226 705	OECD Report * Estimate of breakdown 0 - 50 GRT
Greece	4 000	10 950	7 230	43 600	65 780	Estimate
EEC	236 824	183 390	133 801	635 515	1 190 530	

i.e. : vessels over 25 GRT = 953 706 GRT
" 50 GRT = 770 316 GRT
" 100 GRT = 636 518 GRT

Table 2. Fishing fleet (powered vessels) 1972 and 1978 (V = difference; I = Index 1972 = 100)

		0 - 50 GRT		0 - 500 GRT		More than 500 GRT		Total		
		Number	Tonnage GRT	Number	Tonnage GRT	Number	Tonnage GRT	Number	Tonnage GRT	Horse power
Germany (1)	V	- 368 (1)	- 1 577 (1)	- 38	- 2 308	- 40	- 19 499	- 446	- 23 384	- 34 811 (3)
	I	74	89	81	88	60	84	74	85	91
Belgium	V	- 35	- 1 069	- 45	- 3 915	- 5	- 3 961	- 85	- 8 945	- 2 418
	I	66	69	77	82	20	12	72	70	97
Denmark (2)	V	- 105	- 2 847	+ 159	+ 29 380	+ 3	+ 2 000	+ 57	+ 28 533	+ 226 222 (3)
	I	98	96	138	162	00	00	101	124	141
France	V	- 1 846	- 4 714	- 196	- 35 111	+ 7	- 4 808	- 2 035	- 44 633	+ 67 512
	I	86	95	69	67	109	94	86	84	106
Ireland	V	+ 333	+ 367	+ 89	+ 8 851	+ 1	+ 1 960	+ 423	+ 11 178	+ 26 217
	I	137	103	180	223	00	00	141	160	128
Italy	V	+ 1 724	+ 17 568	+ 180	+ 19 669	0	+ 5 866	+ 1 904	+ 43 101	+ 221 633 (3)
	I	109	114	126	127	100	111	109	117	121
Netherlands	V	- 107	- 3 534	- 70	+ 3 184	+ 1	+ 346	- 176	- 4	+ 66 453
	I	80	75	88	104	133	119	84	100	117
United Kingdom	V	+ 748	+ 4 832	+ 71	- 14 922	- 81	- 62 073	+ 738	- 72 163	+ 75 142
	I	113	107	113	86	47	52	112	76	108
EEC*	V	+ 334	+ 9 026	+ 150	+ 4 758	- 114	- 80 169	+ 380	- 72 181	+ 687 535 (3)
	I	101	102	104	101	71	79	101	95	115

(1) Germany: Comparison 1977/72 for 0 - 50 GRT class following change in method of calculating number of vessels of less than 50 GRT.
(2) Denmark: Comparison 1977/72 as 1977 is latest year for which figures are available.
(3) " : Comparison 1977/72 for engine size.
Sources : Numbers and tonnage: OECD fisheries surveys for 1972, 1978 and draft for 1979 except: France: French maritime fisheries statistics 1972 and draft 1978; Ireland: ICES Statistical Bulletin No. 57 for 1972 (ditto for Germany).
Engine size: Tables 1 to 8. Compiled by EEC Commission.

2.2 Fleet development - West Germany

Along with the UK, the German fleet has been the hardest hit by the general adoption in the 1970s of 200-mile zones. The total number of vessels with engines in 1970 was 1 788, but by 1979 had fallen to only 713 (the latter figure excludes sport fishing vessels), although over the same period the EEC (of Nine) fleet as a whole had grown in numbers by 2.1%. Admittedly, the decline in numbers has to some extent been offset by increases in average GRT and engine capacity per vessel. In terms of vessel numbers the sharpest decline between 1972 and 1978 was in the 0 - 50 GRT and 50 - 500 GRT classes, but where catching capacity is concerned the real loss has been in the distant water fleet (vessels over 500 GRT) where 19 499 GRT was taken out of the fleet, compared with only 3 885 GRT for the two other smaller classes combined.

Further cutbacks expected

In addition, the decline in the distant water fleet since 1978 has continued, while the German government has injected cash into the coastal and middle distance fleets for restructuring. At the end of 1980 the distant water fleet had fallen to 34 vessels, compared with 62 at the end of 1978 (of which four were not operating) and 84 in 1973. The figure for the end of 1980 represented 20 factory ships (a decline of six against 1979) and 14 fresh fish trawlers (down seven from the previous year), with a combined GRT of 70 770 t. Moreover, it is expected that there will be further cutbacks in distant water capacity in 1981, after which it is expected that numbers will stabilise at around 16 freezers and 11 fresh fish trawlers.

The gradual changeover in emphasis from the distant water fleet to the cutter and coastal fleet has been reflected, as in France, by an increasing share of the total

catch being taken by the latter category. In 1980 the cutter and coastal fleet accounted for 92 000 t out of a total catch of 287 000 t, i.e. 32%, compared with only 23.6% in the previous year. Back in 1975 the distant water fleet accounted for 72.2% of the total catch of 434 037 t. At the end of 1979 the number of vessels in the cutter fleet was 710, a slight increase over the previous year, but lower than in the mid-70s (1975, 746 vessels).

Average vessel age increases

As far as age structure is concerned, there was between 1970 and 1978 an increase in the average age of the fishing fleet, although there are variations from sector to sector. Over the past six years the average age of vessels in the distant water fleet has fluctuated around 10.8 - 12.5 years, and at the end of 1979 was 11.9 years, although in the meantime this is likely to have fallen again as the older vessels have been withdrawn in the course of the general reduction in capacity in this sector. According to the EEC Commission, in mid-1980 53 vessels out of the total 77 over 33m were over 12 years old (68%) compared with the EEC average of 56.5%.

For the cutter fleet (including shrimpers), in 1976 52.3% of the 715 vessels in the fleet were over 20 years old, although by 1979 this proportion had sunk to 47%. The most modern vessels in the cutter fleet are shrimpers, which account for just over a third of the vessels and where under 30% are under 20 years old, whereas for other vessels in this fleet nearly 60% are over 20 years old. However, for both shrimpers and other vessels in the cutter fleet the percentage of vessels over 20 years old has decreased gradually over the past five years.

There has been a rapid decline in numbers in the coastal fleet during recent years, with a large number of non-powered vessels being withdrawn or scrapped. In 1975 the coastal fleet comprised 1 702 vessels (including sports vessels), nearly 1 000 of which were not powered, but by the end of 1979 the total had fallen to 456, of which only 98 were not powered. Total engine power in the coastal fleet was 5 898 hp.

2.2.1 Regional structure of the fleet

Deepsea fleet: For this sector the main ports, in declining order of importance, are Bremerhaven, Cuxhaven, Kiel and Hamburg, with the first two of these four ports being by far of greatest importance (in 1979 they accounted for over 90% of catches by the sector).

Cutter fleet: Of the 710 vessels in this fleet at the end of 1979, well over half (406) were based in Schleswig-Holstein, with nearly 60% of these being concentrated on Baltic fishing. However, these Baltic vessels are generally smaller, and in engine power terms over half of the Schleswig-Holstein fleet operates on the west coast (North Sea) of the region. Overfishing and pollution in the Baltic Sea has discouraged investment on the east coast of Schleswig-Holstein. The region as a whole accounts for 49% of German cutter fleet engine power.

The second most important region is Lower Saxony, which accounts for just under one-third of the total, in both vessel numbers and engine power. Hamburg accounts for

7.6% of the vessels and 14.2% of engine power while Bremen accounts for the remaining 3.7% of vessels and 6.9% of engine power.

Coastal fleet: Full time employment in the coastal fishery with small vessels has fallen off rapidly in recent years, and at the end of 1979 the coastal fleet of about 456 vessels was concentrated largely in Schleswig-Holstein (91% of the national total), with 83% of the region's fleet situated on the Baltic coast.

Table 3. Germany: Fishing industry: production - development of prices - fleet and personnel

Germany	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
(1) Landings 1 000 t (landed weight)	422.5	354.7	302.0	330.1	344.6	298.8	300.2	275.7	271.6	230*
(2) Value of landings DM 1 000	348 805	355 851	331 526	425 901	521 832	410 906	436 790	432 564	395 025	372 000*
(3) Average value of landings DM/t	825.5	1 003.2	1 097.8	1 290.2	1 514.3	1 375.2	1 455.0	1 569.0	1 454.4	1 617.0
(4) Index of landings	100	84	71	78	82	71	71	65	64	54
(5) Index of average values of landings	100	122	133	156	183	167	176	190	176	196
(6) General index of consumer prices	100	105.2	111.0	118.8	127.1	134.7	140.4	145.6	149.5	155.7
(7) Index of consumer prices of energy	100	106.4	112.8	128.2	149.8	165.5	176.5	178.4	183.6	
(8) Total number of fishermen	6 669	6 150	5 476	5 948	5 758	5 280	5 160	5 105	4 800	4 368
(9) Number of fishing vessels with engines	(2 814) 1 788	(2 852) 1 785	(2 793) 1 727	(2 680) 1 646	(2 563) 1 599	(2 530) 1 557	(2 467) 1 544	(2 350) 1 484	* 763	* 713
(10) Tonnage of the fishing fleet (GRT)	150 440	144 442	157 419	166 392	155 660	151 992	144 437	142 002	132 949	118 656
(11) Engine capacity of the fishing fleet (hp)	363 754	358 670	381 720	389 990	371 984	362 018	346 444	346 909		
(12) Index of number of fishing vessels	(100) 100	(101) 100	(99) 97	(95) 92	(91) 89	(90) 87	(88) 86	(84) 83	* 43	* 40
(13) Index of tonnage	100	96	105	111	103	101	96	94	88	79
(14) Index of engine capacity	100	99	105	107	102	100	95	95		

Remarks: (1) to (3) for 1979, is a DG XIV estimation based on the results of first nine months
(*) (8) Situation to the 30 September on year in question, except for 1979 when the period is 31/12/79
(9)-Figures in bracket represent the total number of vessels (with and without engines)
-The difference between 1977 and 1978 is due to the fact sport fishing vessels are not included.

Source: EEC Commission documents.

Table 4. German fishing fleet and fishermen, 1979 and 1980

	1980		1979	
	Number	Total GRT	Number	Total GRT
(i) Total vessels with engines	709	105 169	713	118 656
Classification:				
0 - 49.9 GRT	514	10 300	504	11 213
50 - 99.9 GRT	102	7 213	102	7 467
100 - 149.9 GRT	48	5 841	53	6 392
150 - 499.9 GRT	8	1 791	7	1 596
500 - 999.9 GRT	13	11 759	20	17 496
1 000 - 1 999.9 GRT	3	5 127	4	6 525
2 000 and over	21	63 138	23	67 967
(ii) Total vessels without engines	1 068		-	
(iii) Total commercial fishermen	4 884		4 368	
Full-time	3 550		4 136	
Part-time	1 334		232	

Source: OECD.

Table 5. Structure of the deep sea trawler fleet by total tonnage, type of equipment

	Total		Bremerhaven		Cuxhaven		Hambourg		Kiel	
	Number	GRT	Number	GRT	Number	GRT	Number	GRT	Number	GRT
Situation at 31.12.1979	47	91 961	30	59 964	10	24 542	3	5 127	4	3 228
Laid up on 31.12.1979	4	7 592	2	2 224	2	5 368	-	-	-	-
Chartered for research on 31.12.1979	4	12 268	2	7 154	2	5 114	-	-	-	-
Operating on 31.12.1979	39	72 101	26	49 686	6	14 060	3	5 127	4	3 228
Side trawlers	1	826	1	826	-	-	-	-	-	-
Stern trawlers	46	91 135	29	58 238	10	24 542	3	5 127	4	3 228
Freezers	26	73 094	15	45 387	8	22 580	3	5 127	-	-
Freshers	21	18 867	15	13 677	2	1 962	-	-	4	3 228

Source: Ministry of Agriculture, Bonn.

Table 6. Age and size groups of the trawler fleet

Size groups GRT	Total			Age (years)				
	Number	%	GRT	Under 5	5 - 9	10 - 14	15 - 19	20+
650 - 699	2	4.2	1 382	-	-	-	2	-
700 - 799	4	8.5	2 891	-	-	-	3	1
800 - 849	1	2.1	826	-	-	-	1	-
850 - 899	1	2.1	888	-	-	1	-	-
900 - 999	12	25.4	11 482	3	-	3	6	-
1 300 - 1 399	1	2.1	1 398	-	-	1	-	-
1 500 - 1 599	2	4.2	3 132	-	-	2	-	-
1 900 - 1 999	1	2.1	1 995	1	-	-	-	-
2 100 - 2 199	2	4.2	4 321	-	-	2	-	-
2 500 - 2 599	6	12.8	15 342	-	-	4	2	-
2 600 - 2 699	2	4.2	5 368	-	-	2	-	-
3 200 - 3 199	9	19.6	28 628	-	9	-	-	-
3 500 - 3 599	4	8.5	14 308	-	4	-	-	-
Total 31.12.1979	47	100.0	91 961	4	13	15	14	1
		%		8.5	27.7	31.9	29.8	2.1
				(average age) - approx. 11.9 years				

Source: Ministry of Agriculture, Bonn.

Table 7. Distribution of the motor cutters by size and tonnage

	Size								Total	Personnel
	0 - 10m	10 - 14m	14 - 18m	18 - 22m	22 - 26m	26 - 30m	30 - 34m	34m+	31.12.1978	1979
Total number at 31.12.1979	78	123	294	59	106	34	12	4	710	1 681

Source: Ministry of Agriculture, Bonn.

Table 8. Distribution of the motor cutters by engine power

	Number	%	Total HP/kWh		%
Situation 31.12.1979	710	100	138 690	101 978	100.0
HP 1 - 75	102	14.4	4 761	3 501	3.4
76 - 100	61	8.6	5 652	4 156	4.1
101 - 125	35	4.9	4 005	2 945	2.9
126 - 150	111	15.6	16 231	11 935	11.7
151 - 200	142	20.0	26 678	19 579	19.2
201 - 259	102	14.4	23 496	17 276	17.0
251 - 300	90	12.7	26 260	19 309	18.9
301 - 350	12	1.7	3 932	2 928	2.9
351 - 400	24	3.4	9 325	6 857	6.7
401 - 450	-	-	-	-	-
451 - 500	4	0.5	2 000	1 470	1.4
501 - 600	27	3.8	16 350	12 022	11.8
Total HP/kWh	-	-	138 690 / 101 978		-
Average HP/kWh			195.3 / 143.6		

Source: Ministry of Agriculture, Bonn.

Table 9. Age of composition of the motor cutters fleet on 31.12.1979

Age	Motor cutters, excluding shrimpers		Shrimpers	
	Number	%	Number	%
1- 5	60	13.5	36	13.5
6 - 10	48	10.9	49	18.4
11 - 15	39	8.8	49	18.4
16 - 20	38	8.6	53	19.9
21 - 25	19	4.4	30	11.3
26 - 30	58	13.1	12	4.5
31 - 35	60	13.5	16	6.1
36 - 40	41	9.3	4	1.5
41 - 45	37	8.4	8	3.0
46 - 50	11	2.5	7	2.6
51 - 55	6	1.4	1	0.4
56 - 60	3	0.7	1	0.4
61 - 65	3	0.7	-	-
66 - 70	10	2.3	-	-
71 - 75	6	0.7	-	-
76 - 80	2	0.5	-	-
over 80	3	0.7	-	-
Total	444	100.0	266	100.0
Out of service	13	2.9	4	1.5
In operation	431	97.1	262	98.5
Over 20 years old	259	58.3	79	29.7

Source: Ministry of Agriculture, Bonn.

Table 10. Coastal fishing craft

Total	Situation 31.12.79	of which		Personnel	
		Motorised	Not motorised	Full-time	Part-time
Number	456	358	98	345	209
HP / kWh	5 898 / 4 337				

Source: Ministry of Agriculture, Bonn.

2.3 Fleet development - France

Like certain other member states, France too has felt the impact of reduced access to distant water fishing grounds (mainly off the eastern seaboard of Canada) and the inflation of fuel prices (despite government fuel subsidies since 1977). In 1970 the French fishing fleet comprised 13 430 vessels with an aggregate tonnage of 282 857 GRT and engine capacity of 1 052 115 hp. By 1980, however, the number of fishing vessels had dropped by 17.5% although the decline in tonnage to 204 190 GRT at nearly 30% was much greater, reflecting the loss of capacity in the distant water (traditionally salt cod) fleet (Grande Peche).

This part of the fleet at the start of 1980 numbered 13 vessels with a total tonnage of 21 845 GRT, compared with 30 in operation at the start of the 1970s. Many of the older vessels have been withdrawn from service so that over half of the vessels still in service are less than 10 years old, according to the Union des Armateurs a la Peche de France. In 1979 just under half of the turnover of this distant water fleet resulted from operations in the NAFO zone (mainly in the Gulf of St Lawrence), and now almost all of the catch from these waters is of frozen cod with only just over 5% being of traditional salt cod.

Exploring new fishing grounds

One of the main difficulties for the Grande Peche fleet has been to maintain operations at a viable tempo throughout the year, since the cost of keeping a large trawler in port is prohibitive. The reduction of fishing opportunities in the NAFO zone has meant, for example, that over half of the annual quota is landed from the first voyage. Outside the now almost universal 200-mile zones fishing opportunities are strictly limited and the French fleet has in any case to contend with huge fleets from the eastern bloc, many of whose vessels operated formerly in the North Sea. Some alternatives have been found - shrimp and redfish off Greenland, hake off South Africa, pelagic operations off South America - while others are being explored, often with the help of government subsidies. These include notably Kerguelen in the Southern Ocean, where the Soviet fleet has operated for several years, and New Caledonia in the Pacific, which is however beyond the Polynesian continental shelf and therefore relatively poor in stocks. But there are two major difficulties in developing fisheries of this kind. First, the distance from the European market raises obvious problems, and second, the lack of local infrastructure for the industrialised fishing fleets. And as time passes the need to make progress in these fisheries becomes more urgent as the French quotas in the Gulf of St Lawrence expire in 1986, but could be renewed.

Building up the tuna fleet

Given the decline in the profitability of the distant water fleet, investment has been transferred to some degree to the tuna fleet. At the end of 1979 this fleet comprised 22 vessels, with tonnage having been static at about 19 000 - 20 000 GRT since 1974. But with new vessels having been brought into the fleet the average age of vessels has been around five years since 1977. There have been doubts recently about possible overcapacity developing in the tuna fleet, too (possibly encouraged by government construction loans and grants for the sector) - tuna catches are in any case prone to fluctuation because of varying hydrological conditions. Efforts are being made to exploit new fishing grounds (such as Cape Verde, Ascension, Brazil and Venezuela) but the danger of overfishing is much greater for migratory species such as tuna where so far little has been achieved in the sphere of international agreement on catch limitation. Expansion of the Spanish tuna fleet also represents a potential threat to the French sector.

But developments in the tuna sector run counter to the general trend in the French fleet. Emphasis has been increasingly on waters nearer to home, and the EEC Commission estimates that coastal fishing accounted for around 66% of total French landings in 1979 compared with only 50% in 1974. The fresher trawler fleet (peche hauturiere fraiche) in particular has been harder hit by inflated operating costs than the inshore fleet (peche artisanale) because its catches have a lower average value than those of the inshore fleet. This is due partly to the nature of the species caught and partly to the generally better quality of catches from the inshore fleet. At the start of 1980 the fresher trawler fleet numbered 196 vessels with a total GRT of 62 772 tonnes, with over one-third of these vessels in the 100 - 200 GRT range and a further 29% in the 200 - 300 GRT class. Increases in costs have discouraged investment and at the start of 1980 57% of vessels in this fleet were over 10 years old and only 14% less than 5 years old.

Predominance of smaller vessels

In terms of numbers the vessels below 100 GRT dominate the French fleet, accounting for nearly 11 000 vessels or 97% of all French vessels in 1980 (and almost all of the vessels in the 0 - 100 GRT range are below 50 GRT). This represents the formidable "artisanale" fleet, accounting, however, for only 48% of total fleet tonnage. The artisanale fleet has faired relatively well in recent years, partly on account of lower fuel costs per kg landed fish, but also due to the adoption of improved fishing techniques such as pair trawling and pelagic fishing. Proximity to fishing grounds also lowers operating costs, but an increase in both average GRT and efficiency poses the threat of over-fishing of inshore stocks, despite a 14% decline in numbers in the 0 - 50 GRT class over the 1972-78 period. After Italy, France has the largest EEC fleet in the 0 - 50 GRT range, and its share in the GRT of the total French fleet has grown appreciably in recent years.

2.3.1 Regional structure

There is considerable regional specialisation in the French fishing industry, with certain ports and regions tending towards specific types of operation. Evidently, then, with the changes in the fleet which have taken place in recent years and which are likely to continue for some time, there have been corresponding changes in regional structure.

As far as the fresher trawler fleet is concerned, Boulogne heads the league in terms of tonnage with 19 006 GRT at the start of 1980, representing 40 vessels, over half of which were under 10 years old. Landings in 1979 reached 111 025 tonnes worth Fr 371M. But the decline of the herring fishery and of North Sea and Faroe stocks or quotas in general (particularly saithe for processing), has hit earnings at Boulogne to such an extent that in 1977 value of landings there lost first place in France to the Brittany port of Lorient, the second fresher trawler port (although the lead has since been re-established).

At Lorient the average value of the fish landed is generally higher. Total tonnage in the Lorient fresher fleet at the start of 1980 was 15 471 GRT, accounting for 27 vessels. Whereas the range of vessel size at Boulogne is relatively large, at Lorient almost all of the vessels are in the 500 - 700 GRT range. At the same time the average age of the vessels is less than at Boulogne, with 20 out of 27 Lorient freshers under 10 years old. But there have recently been sales of relatively new vessels as quotas dry up and there is uncertainty about Lorient's future. Landings at Lorient in 1979 were around 65 000 t, with a total value of Fr 347M (i.e. average value was around 60% higher than at Boulogne, which has one of the lowest average catch values in the country).

More new freshers

France's third fresher port is Concarneau, which at the beginning of 1980 represented 49 vessels with a total GRT of nearly 11 000 t. Here, then, average vessel size is much smaller than in the preceding two ports. Average age has in the past been higher also, with 55% of vessels over 10 years old at the start of 1980; there has, however, in

recent years been a spate of new vessel acquisition, with seven freshers at the port under five years old, far above the average for the main fresher trawler ports. In 1979 Concarneau vessels landed 32 933 t worth Fr 197M. The other main ports for the fresher trawler fleet are, in declining order of vessel GRT, Etel, Douarnenez, La Rochelle, Fecamp and Grand-Fort-Philippe.

Fourth in the league of landings comes Le Guilvinec, with a mixed middlewater and coastal fleet. Fifth and sixth ports are respectively La Rochelle and Douarnenez, but below these it becomes increasingly difficult to arrange the ports in order because catch composition rather than volume plays an increasing role (e.g. the high average value of landings at ports concentrating on tuna, or shellfish and molluscs).

Tuna fleet

The French tuna fleet is concentrated at Concarneau (19 vessels) with a small contingent of four vessels at Douarnenez. Nearly half of the tuna caught by French vessels is not in fact landed in French ports, but sold, for example, in West African coastal states, some of it then being exported already canned to the French market.

The distant water fleet (Grande Peche) is concentrated in Bordeaux, Facamp and St Malo, and vessels from all three ports have taken part in the traditional fisheries off Norway, Canada and southern Africa. St Malo is the first of the three ports, accounting for six of the 13 vessels and over half of the 21 845 GRT in the Grande Peche fleet.

Big artisanale catch in UK zone

The French inshore and coastal fleet (artisanale), mostly skipper-owned, is located the length of the French coast, although concentrations of vessels can be found at certain ports, especially along the northern France and Brittany coast. Traditionally a large part of the operations of the artisanale fleet has been off the British and Irish coasts, hence the bitter arguments over access to coastal fishing grounds. The French reckon that around 30% of French fish is caught within the UK 200-mile zone, although not all of this comes from the coastal belt. But despite these developments it is generally recognised that the inshore fleet has been the least affected by the move towards 200-mile zones.

Table 11. France: Fishing industry: production - development of prices - fleet and personnel

France	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
(1) Landings 1 000 t (landed weight)	650.4	628.5	671.6	689.5	704.0	695.2	698.2	712.6	715.3	713.7
(2) Value of landings FF 1 000	1558 259	1601 801	1920 173	2194 159	2672 973	2648 524	2937 544	3344 494	3537 079	3756 514
(3) Average value of landings FF/t	2 442	2 549	2 859	3 182	3 797	3 810	4 207	4 693	4 945	5 264
(4) Index of landings	100	96.6	103.3	106.0	108.2	106.9	107.4	109.6	110.0	109.7
(5) Index of average values of landings	100	104.4	117.1	130.3	155.5	156	172.3	192.2	202.5	215.6
(6) General index of consumer prices	100	105.3	111.7	119.9	136.3	152.2	166.8	182.7	199.6	220.8
(7) Index of consumer prices of energy	100	n.a.	n.a.	114.1	156.8	169.2	187.2	209.2	227.4	263.6
(8) Total number of fishermen	35 799	34 476	34 609	34 382	34 021	32 172	31 084	28 852	22 456	23 989
(9) Number of fishing vessels with engines	13 430	14 016	14 163	13 347	13 268	12 967	12 756	12 524	12 128	11 118
(10) Tonnage of the fishing fleet (GRT)	282 857	281 653	279 344	271 683	270 467	275 835	260 981	243 362	234 710	197 780
(11) Engine capacity of the fishing fleet (hp)	1052 115	1123 582	1153 656	1235 852	1218 159	1325 587	1292 778	1233 650	1221 168	
(12) Index of number of fishing vessels	100	104.4	105.5	99.4	98.8	96.6	95.0	93.2	90.3	82.8
(13) Index of tonnage	100	99.6	98.7	96.0	95.6	97.5	92.3	86.0	83.0	69.9
(14) Index of engine capacity	100	106.8	109.6	117.5	115.8	126.0	122.9	117.3	116.1	

Remarks: (8) The total number of registered fishermen - this figures include 12 396 owner-fishermen in 1970 and 11 597 in 1977.
Source: EEC Commission documents.

Table 12. French fishing fleet and fishermen [1], 1979 and 1980

	1980		1979	
	Number	Total GRT	Number	Total GRT
Classification:				
0 - 49.9 GRT	10 656	87 981	10 699	86 265
50 - 99.9 GRT	119	9 075	121	9 322
100 - 149.9 GRT	80	9 956	76	9 475
150 - 499.9 GRT	165	40 092	160	38 957
500 - 999.9 GRT	57	37 934	48	41 613
1 000 - 1 999.9 GRT	12	16 717	12	17 300
2 000 and over	1	2 435	2	4 848
Total	11 090	204 190	11 118	197 780
	Number (30.10.1980)		Number (30.10.79)	
Conchyculture			3 178	
Small-scale fishing			12 810	
Coastal fishing			2 673	
Middle-water fishing			4 687	
Distant-water fishing			641	
Total	24 105		23 989	

1) Boats operating at 31.12
Registered fishermen
Source: OECD

Table 13. State of French industrial fleet (over 100 GRT) 1.1.81

Freshers	Vessels	Total GRT	Tuna fleet	Vessels	Total GRT	Distant-water fleet	Vessels	Total GRT
Boulogne/S/Mer	35	15 790	Concarneau	19	16 327	Bordeaux	4	6 371
Concarneau	48	10 704	Douarnenez	4	3 359	Fecamp	1	1 181
Douarnenez	12	3 220				Saint-Malo	4	8 880
Etel	44	7 774						
Fecamp	5	2 399						
Grand-Fort-Philippe	3	815						
La Rochelle	12	2 548						
Lorient	26	14 497						
Total	185	57 747		23	19 686		9	16 432

Source: UAPF

Table 14. Age structure of tuna, distant water and fresher trawler fleets, at January 1, 1981

Ports \ Years	0 - 5	6 - 10	11 - 15	16 - 20	20+	Total
Tuna fleet						
Concameau	9 8 102	8 7 067	2 1 158			19 16 327
Douarnenez		2 2 221	2 1 138			4 3 359
Total	9 8 102	10 9 288	4 2 296			23 19 686
Distant-water fleet						
Bordeaux	2 3 175	2 3 196				4 6 371
Fecamp				1 1 181		1 1 181
Saint-Malo		3 7 283	1 1 597			4 8 880
Total	2 3 175	5 10 479	1 1 597	1 1 181		9 16 432
Fresher trawler fleet						
Boulogne/S/Mer	5 3 055	15 8 042	6 2 543	5 1 299	4 851	35 15 790
Concameau	1 268	20 5 250	7 1 447	17 3 146	3 593	48 10 704
Douarnenez	2 720	7 1 986		3 514		12 3 220
Etel			8 1 702	32 5 553	4 519	44 7 774
Fecamp		4 1 953	1 446			5 2 399
Grand-Fort-Philippe				3 815		3 815
La Rochelle	1 345	1 282	4 837	5 961	1 121	12 2 548
Lorient	3 1 620	18 10 851	3 1 181	2 845		26 14 497
Total Vessels	12 (6.5%)	65 (35.1%)	29 (15.7%)	67 (36.2%)	12 (6.5%)	185
Total GRT	6 008 (10.4%)	28 364 (49.1%)	8 156 (14.1%)	13133 (22.8%)	2 084 (3.6%)	57 747

Source: UAPF

Table 15. State of French fleet, 1976 and 1981

	Vessels			Tonnage		
	1976	1981	% change	1976	1981	% change
Fresher trawlers						
Boulogne/S/Mer	37	35	- 5	19 968	15 790	- 21
Concameau	72	48	- 33	15 107	10 704	- 29
Douarnenez	14	12	- 14	3 454	3 220	- 7
Etel	37	44	+ 19	6 309	7 774	+ 23
Fecamp	5	5	-	2 338	2 399	+ 2
Grand Fort Philippe	13	3	- 77	3 065	815	- 74
La Rochelle	31	12	- 62	7 358	2 548	- 65
Lorient	35	26	- 25	18 366	14 497	- 21
Total	244	185	- 24	75 965	57 747	- 24
Tuna fleet						
Concameau	22	19	- 14	15 806	16 327	+ 3
Douarnenez	5	4	- 20	3 538	3 359	- 5
Total	27	23	- 15	19 344	19 686	+ 2
Distant water cod fleet						
Bordeaux	8	4	- 50	12 851	6 371	- 50
Fecamp	5	1	- 80	7 195	1 181	- 84
Le Havre	1	-	- 100	1 598	-	- 100
Saint-Malo	6	4	- 33	12 016	8 880	- 26
Total	20	9	- 65	33 660	16 432	- 51
Total non-artisanal	291	217	- 25	128 969	93 865	- 27

Source: UAPF.

2.4 Fleet development - Italy

In terms of sheer numbers the Italian fleet dominates that of the EEC (Nine) with 22 388 vessels with engines, accounting for 43% of the total in 1978. (Since that time there has not been any significant change in numbers). Even in tonnage the Italian fleet heads the EEC league at 295 981 GRT in 1978, but stands only marginally ahead of the UK (276 706 GRT) which has only about one-third as many vessels. In addition, there are around 18 000 vessels without engines, although their average GRT is only 1.25 t. Even in the motorised class 96% of the vessels are in the 0 - 50 GRT range in 1979, reports OECD. Moreover, the dominance of small boats in the motorised class is likely to continue because many previously non-powered vessels are being fitted with outboard motors. Out of the total fleet less than one per cent of all motorised vessels are of over 150 GRT. In 1979 only 52 Italian vessels were operating in the Atlantic, accounting for 40 500 GRT.

Italy also goes against the general trend for the northern member states of the EEC inasmuch as from 1970-1978 there was, in the motorised fleet, a consistent rise in vessel numbers, tonnage and engine capacity. This was not, however, reflected in a corresponding increase in landings, which have fluctuated widely, and in 1978 were only 1% higher than at the start of the decade. There has been an apparent increase of around 26% in the numbers of medium tonnage Mediterranean vessels in recent years, but in reality the increase is probably not so great, since statistics on withdrawals and laying-up are far out of date. Much of the increase in this class has followed demand both at home and abroad for sardines and tuna and has also filled the need to replace small, low-powered coastal trawlers.

Table 16. Italy: Fishing industry: production - development of prices - fleet and personnel

Italy	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
(1) Landings 1 000 t (landed weight)	358	361	386	364	387	367	379	338	361	381
(2) Value of landings 1 000 000 Lire	128 038	138 062	168 960	167 300	207 470	243 813	293 222	373 708	435 363	516 963
(3) Average value of landings 1 000 Lire/t	358	382	438	460	536	664	774	1 105	1 206	1 359
(4) Index of landings	100	101	108	102	108	102	106	94	101	106
(5) Index of average values of landings	100	107	122	128	150	185	216	309	337	379
(6) General index of consumer prices	100	104.9	110.8	122.8	146.3	171.1	199.8	236.6	265.2	304.4
(7) Index of consumer prices of energy	100	104.6	104.5	104.7	149.4	158.7	178.9	230.5	256.7	304.2
(8) Total number of fishermen	62 045	62 444	62 557		62 089	62 292	62 149			
(9) Number of fishing vessels with engines	19 774	20 166	20 484	20 744	20 883	21 227	21 435	21 797	22 388	21 996
(10) Tonnage of the fishing fleet (GRT)	239 713	246 668	252 878	258 350	262 776	269 575	271 138	277 094	295 981	257 243
(11) Engine capacity of the fishing fleet (hp)	948 504	996 248	1040 681	1080 603	1116 062	1166 987	1195 731	1262 314		
(12) Index of number of fishing vessels	100	102	104	105	106	107	108	110	113	111
(13) Index of tonnage	100	103	105	108	110	112	113	117	123	107
(14) Index of engine capacity	100	105	110	114	118	123	126	133		

Remarks: (8) number of crew on working vessels
(1) 1970: estimation.
Source: EEC Commission documents.

Table 17. Italian fishing fleet and fishermen, 1979 and 1980

	1980		1979	
	Number	Total GRT	Number	Total GRT
(i) Total vessels with engines	22 604	302 598	22 388	295 981
Classification:				
0 - 49.9 GRT	21 640	148 556	21 467	144 220
50 - 99.9 GRT	577	42 124	546	40 124
100 - 149.9 GRT	212	25 647	208	25 324
150 - 499.9 GRT	121	28 343	110	26 552
500 - 899.9 GRT	28	19 165	31	20 998
900 - 1 800.9 GRT	25	34 947	25	34 947
1 801 - GRT and over	1	3 816	1	3 816
(ii) Total vessels without engines	18 256	22 582	20 371	25 491
(iii) Total fishermen	49 599*		45 599*	-

In 1980, 45 of these vessels, with a total GRT of 41 149 were directed towards Atlantic fisheries (in 1979, there were 52 with a total of GRT 45 728).
Source: OECD.

2.5 Fleet development - Netherlands

As in other EEC countries on the North Sea coast, the 1970s saw considerable re-alignment of the Dutch sea-fishing effort, with many of the larger sea-going vessels (grote zeevisserij) being taken out of service, while new smaller vessels were brought into the fleet or old ones were modernised and uprated in catching power.

In 1971 there were 675 sea-fishing vessels (it is necessary to make this distinction because of the considerable freshwater fishing fleet), with a total 313 000 hp, but by 1980 vessel numbers had fallen to 560 while total engine capacity had risen to 429 000 hp. In terms of the increase in engine capacity per vessel, the total Dutch fleet has grown much faster (by 54% over 1972-77) than the EEC (average 14.1%) over the same period. Tonnage per vessel has also grown rapidly in the fleet (including freshwater fleet) by 32.1% over 1972-77, while hp/GRT has grown by 21%.

Smaller but more powerful middle distance fleet

In numbers the large vessel sea-going fleet has shown the greatest decline from 74 (excluding cutters over 27m and owner-operated vessels) in 1971 to 22 in 1980, although the cutback in engine capacity in this sector has been on a smaller scale from 75 000 hp in 1971 to 45 000 hp in 1980. Most of the older side-trawlers have been withdrawn and most of the remaining fleet has onboard freezing capacity. The bulk of vessels (18) had over 2 000 hp in 1979, a considerable change from 1971, when 80% of the sea-going fleet had engines with less than 1 200 hp. The age structure of the middle distance fleet has also improved over the past ten years, with 66% of the fleet in 1979 less than 10 years old, compared with 58% in 1971. Only one vessel in this sector is over 20 years old. Several vessels have also been lengthened and had freezing capacity increased in order to perform better in the mackerel fishery.

The trawlers in this middle distance fleet fish primarily in the North Sea, off Ireland and Scotland, operating chiefly for herring, mackerel and also roundfish. Only 10-15% of the catch of this fleet comes from the Dutch part of the EEC 200-mile zone, with the remainder coming in the main from waters under British jurisdiction. The middle distance fleet is in the hands of 12 concerns.

Mackerel replacing herring

The inshore and coastal fleet (kleine zeevisserij) is mostly owner-operated and activity is concentrated in the southern North Sea, the German Bight, the Danish zone and fishing grounds in the Irish Sea and Channel. Main sources of revenue are sole, plaice, turbot, and smaller quantities of roundfish, although mackerel is growing in importance as a replacement for herring.

Vessel numbers in the inshore and coastal fishery (excluding shrimp fishery) have declined from 450 in 1971 to 350 in 1979, although average engine capacity over that period increased from around 514 hp to 860 hp. Around 80% of vessels in this sector have capacity in the 400 - 1 500 hp range, and 30% of the vessels have over 1 100 hp.

The Dutch Agricultural Economics Institute now reckons that the inshore and coastal fleet has been operating at optimum capacity for some years. In view of rising costs it is thought that the only way in which productivity could be improved would be to have the fleet spend more time at sea, and under present North Sea stock conditions the longterm advisability of such an approach is dubious.

Of the inshore and coastal fleet nearly 60% of vessels are under 10 years old, while only 7% are over 20 years old. For the sea-going fleet mackerel has also become an important source of earnings, accounting for 46% of total earnings in 1978 compared with only 4% in 1971. The inshore and coastal fleet is less dependent on non-Dutch waters than the middle distance trawler fleet, but still 40% of landed value results from catches outside the Dutch economic zone.

There was an upturn to Hfl 57.5M in investment in the Dutch fleet in 1979 after three relatively slack years, when it hovered around the Hfl 20M p.a. mark. In 1980 investment increased to Hfl 175M. Before that, in 1973 and 1974 investment reached Hfl 135M and 175M respectively. Increasingly investment is being concentrated in the inshore and coastal fleet (including the shrimping fleet), with the trend over the past couple of years being towards installation of more powerful motors. Vessels over 1 100 hp are switching increasingly to beam trawling, while those in the 300 - 1 000 hp range are turning to multi-purpose fishing.

More beam trawlers

One main feature of the expansion in capacity in the Dutch fleet in recent years has been the dominance of beam trawlers in new orders, designed to be able to switch to other types of operation such as mid-water trawling. At the same time they require a crew of only five or six men. Various reasons have been put forward for the boom in vessel construction. These include tax advantages, the relative slump in new vessel orders after the mid-70s oil crisis, the good returns in the sole and plaice sectors in 1978 and 1979, the money paid out by the state in scrapping and laying-up premiums, etc. It has also been suggested that illegal earnings from fishing are being ploughed back into the industry through purchase of highly efficient beam trawlers, even though these cause considerable damage to the seabed and the foodchain of bottom species.

The shrimping fleet has remained fairly stable over the past 10 years with around 150 vessels, although an increasing number are devoting more time to operations for

roundfish. Total vessel power in this sector is around 27 000 hp. Unlike the rest of the Dutch fleet, few new vessels have been added to this sector in recent years, and 60% of the vessels are over 20 years old and a further 30% over 10 years. Fluctuating prices for shrimps discourage major investment. Hydrological changes cause violent changes in yields, which lead to price fluctuations, and landings by vessels from West Germany also have a marked effect on the price to producers. Owner-operated vessels are again the rule in the shrimp fishery, which is active mainly off the Dutch coast and in the German Bight. Only 30% of the catch comes from waters outside Dutch jurisdiction.

Increased catching capacity

Overall, at the end of 1980 just over half (48 720 GRT) of total Dutch capacity (93 161 GRT) was accounted for by vessels in the 150 - 500 GRT range, with around 13 000 GRT each in the 50 - 100 GRT and 100 - 150 GRT ranges, and 10 000 GRT in the under 50 GRT class, according to the EEC Commission. The decline in numbers over the past decade has been compensated for by increased engine capacity and catching potential.

2.5.1 Regional structure

The two main ports in the Netherlands are Scheveningen and IJmuiden. Between them these two ports account for just over half of total landings. Much smaller landings take place at Urk, Den Helder, Den Oever, Harlingen, Colijnsplaat, Breskens and Goedereede. The main fish auctions are at Breskens, Den Helder, Den Oever, Harlingen, Lauwersoog, Scheveningen, Stellendam, Urk, Vlissingen and IJmuiden.

Urk with its large share of flatfish and predominantly sole landings has a relatively high average catch value. The position of Den Helder is very similar, and many of the smaller ports have a relatively high catch of flatfish. Only IJmuiden and Scheveningen are involved in the herring and mackerel fisheries, and have a much higher proportion of larger boats. These two ports plus Urk and Den Helder account for nearly 60% of demersal landings. However, a number of much smaller ports not listed above still account for about 20% of national catch value; the bulk of the income of these small ports is based on production of shellfish and molluscs.

Table 18. Netherlands: Fishing industry: production - development of prices - fleet and personnel

Netherlands	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
(1) Landings 1 000 t (landed weight)	259.8	277.7	301.8	299.9	284.1	305.1	248.2	275.4	286.3	302.3
(2) Value of landings 1 000 Hfl	280 944	303 927	348 975	417 858	423 855	469 143	461 864	463 103	412 675	485 683
(3) Average value of landings Hfl/t	1 081	1 094	1 156	1 393	1 491	1 537	1 861	1 681	1 441	1 607
(4) Index of landings	100	107	116	115	109	117	96	106	110	116
(5) Index of average values of landings	100	101	107	129	138	142	172	156	133	149
(6) General index of consumer prices	100	107.6	116.2	125.7	138	151.7	165.2	176.3	183.9	192.2
(7) Index of consumer prices of energy	100	107.1	115.3	124.6	145.5	167.9	189.1	196.1	210.4	237.8
(8) Total number of fishermen	5 514	5 063	4 947	4 980	5 069	4 619	4 327	3 964	3 877	3 421
(9) Number of fishing vessels with engines	1 294	1 156	1 123	1 115	1 116	1 073	1 025	933	924	908
(10) Tonnage of the fishing fleet (GRT)	90 190	86 816	88 197	96 006	105 255	96 312	90 391	87 215	88 125	85 846
(11) Engine capacity of the fishing fleet (hp)	367 676	364 180	383 662	442 734	510 191	485 417	458 901	446 901	450 115	
(12) Index of number of fishing vessels	100	89.3	86.8	86.2	86.2	82.9	79.2	72.1	71.4	70.2
(13) Index of tonnage	100	96.2	97.8	106.5	116.7	106.8	100.2	96.7	97.7	95.2
(14) Index of engine capacity	100	99	104.3	120.4	138.8	132	124.8	121.4	122.4	

Remarks: The same source (Jaarverslag Visserij) gives the differences according to published tables
We are obliged to take the figures which seem to us to best agree with other sources.
Source: EEC Commission documents.

Table 19. Netherlands fishing fleet and fishermen, 1979 and 1980

	1980		1979	
	Number	Total GRT a)	Number	Total GRT a)
(i) Total vessels with engines	930	93 161	908	85 846
Classification:				
0 - 49.9 GRT	416	10 191	421	10 459
50 - 99.9 GRT	174	13 100	179	13 407
100 - 149.9 GRT	111	13 775	106	13 111
150 - 499.9 GRT	216	48 720	196	45 704
500 - 999.9 GRT	13	7 375	6	3 165
1 000 - 1 999.9 GRT	-	-	-	-
2 000 and over	-	-	-	-
(ii) Total vessels without engines	-	-	-	-
(iii) Total commercial fishermen	3 677		3 421	-
Full-time	3 677		3 421	
Part-time	-		-	

(a) Inland and inshore fisheries included.
Source: OECD.

Table 20. Investment in the Dutch fishing industry 1974 - 80 [1]

	1974	1975	1976	1977	1978	1979	1980
Total:							
Number of new vessels	60	27	10	6	16	20	32
Number of replaced engines	24	17	40	36	36	38	16
Investment Hfl M	175.0	73.0	18.1	13.5	22.2	57.7	146.6
Of which:							
Inshore and coastal fishery [2]							
Number of new vessels	51	19	3	-	1	11	31
Number of replaced engines	25	9	20	22	14	30	12
Investment Hfl M	150.4	46.9	8.8	6.8	4.9	45.6	109.0
Middle distance fishery							
Number of new vessels	5	5	-	-	-	-	1
Number of replaced engines	1	-	-	-	-	-	-
Investment Hfl M	24.1	21.9	-	-	-	4.1	26.6

1) including lengthening and second-hand vessels purchased abroad, excluding electrical apparatus; 2) including shrimp fishing.
Source: LEI

Table 21. The Dutch fishing fleet, December 31, 1980

	1974	1975	1976	1977	1978	1979	1980 1)
Vessels involved in:							
- Inshore and coastal fishing 2)	614	560	500	495	498	502	538
- Middle and distance fishing	64	44	42	42	41	27	22
Total	678	604	542	537	539	529	560
Engine capacity:							
I) in '000 kW							
- Inshore and coastal 2)	271	264	240	239	240	247	282
- Middle distance	62	50	48	49	38	36	33
Total	333	314	288	288	278	283	315
II) in '000 hp							
- Inshore and coastal 2)	368	359	326	325	326	337	384
- Middle distance	84	68	66	66	52	49	45
Total	452	427	392	391	378	386	429
Vessels with hull:							
0 - 10 years old	337	302	279	267	230	204	216
11 - 20 years old	224	190	154	161	190	197	200
over 20 years old	117	112	109	109	119	128	144
Fishermen							
- Inshore and coastal 2)	2 747	2 421	2 097	2 107	2 136	2 175	2 286
- Middle distance	796	593	578	581	568	445	383
Total	3 543	3 014	2 675	2 688	2 704	2 620	2 669

1) provisional; 2) including shrimp fishing.
Source: Fisheries Directorate; Maritime Inspectorate; CBS; LEI.

2.6 Fleet development - Belgium

At the end of 1980 the Belgian fleet, the smallest of the Community, comprised 208 vessels, a sharp decline from the 315 in operation in 1970. In terms of vessel numbers the main cutback has been in the small inshore and southern North Sea fleet (up to 70 GRT), where between 1971 and 1980 numbers have fallen from 155 to 80 and GRT from 6 310 t to 3 358 GRT. There was in the early 70s a corresponding move to replace some of these vessels with larger and more powerful units, and in 1974 the middle range of vessels (70 - 180 GRT) reached its peak in numbers (135), GRT 14 711 t) and engine capacity (56 228 hp).

This sector has traditionally operated in the northern North Sea, the east coast of Great Britain, the Bristol Channel, the Irish Sea and the south-west coast of Ireland. Since 1974 there has been a considerable reduction, with numbers settling out at around 100. In 1980 total GRT was 11 500 GRT and engine capacity 46 100 hp, thus revealing a gradual increase in hp/GRT in this middle class of fishing vessel.

Increase in 180 - 400 GRT class

In the next largest class of vessel there has been considerable expansion over the past decade. This class covers vessels of 180 - 400 GRT and is officially defined as operating "in the Icelandic Sea", although increasing numbers are of course operating outside that zone. Numbers in this category have increased from 10 in 1971 to 24 in 1980; likewise, GRT has more than doubled over the same period from 2 228 GRT in 1971 to 5 251 GRT in 1980. The need to maintain catches with a reduced number of vessels has been especially reflected in this category of vessel, where average hp/GRT has increased considerably to improve catch potential. In fact, hp/GRT in 1971 was 2.94 and in 1980 had risen to 4.05.

In the final category, which includes vessels over 400 GRT, there has been little change, since the fleet was so small to start with. Numbers have fallen from 3 to 2, GRT from 1 387 t to 696 t and engine capacity from 3 550 hp to 2 550 hp. Both vessels are over 20 years old, and operate off Iceland. There is little likelihood of other vessels being added in this category, since they are used to exploit Belgium's limited concession off Iceland, the agreement on which stipulates that licences may not be transferred from old vessels to new vessels, i.e. the concession is finite.

Fewer new vessels

Overall then, the fleet over the 1971-80 period was cut in numbers by 31%, in tonnage by 12.2% and in engine capacity by 1.2%. Many vessels, especially in the mid-70s, were fitted with new more powerful engines. However, there has been a marked slowing down in the addition of new vessels to the fleet compared with the 1960s - during 1961-70, 120 new vessels were registered, but only 35 during 1971-80. These figures, however, tend to exaggerate the difference, since the vessels built in the latter period were predominantly in the 180 - 400 GRT range, but in the 1960s emphasis was on construction of vessels in the 70 - 180 GRT range.

2.6.1 Regional structure

Zeebrugge heads the list of Belgian ports in terms of vessels, tonnage and engine capacity. It accounts for 54.8% of vessels, 57.1% of tonnage and 60.4% of engine capacity. Next comes Ostend, with 30.3%, 32.2% and 29.2% respectively, and third is Nieuwpoort with 13.9%, 9.6% and 9.4% respectively. There is only a small contingent at the declining port of Blankenberg, while Zeebrugge is the only port where capacity has been expanding, having a higher proportion of vessels in the larger tonnage categories.

Zeebrugge also leads in terms of annual catch value (around 53% of the Belgian total), although in tonnage Ostend leads with landings of around 50% of the total 39 000 t approx. Ostend catch value is around 41% of total, and Zeebrugge tonnage is around 40% of national total. Nieuwpoort accounts for 6.9% of catch and 5.9% of value. In line with fleet structure, landings continue to increase at Zeebrugge at the expense of the other two main ports.

Table 22. Belgium: Fishing industry: production - development of prices - fleet and personnel

Belgium	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
(1) Landings 1 000 t (landed weight)	46.6	52.6	50.3	45.6	41.1	40.8	37.9	38.4	42.8	41.2
(2) Value of landings 1 000 000 BFr	931.8	1 057.6	1 097.5	1 283.2	1 292.6	1 335.8	1 470.0	1 555.2	1 770.6	1 875.0
(3) Average value of landings BFr/t	19 983	20 116	21 799	28 159	31 425	32 768	38 827	40 449	41 347	45 470
(4) Index of landings	100	112.8	108	97.7	88.2	87.4	81.2	82.5	91.8	88.4
(5) Index of average values of landings	100	100.7	109.1	140.9	157.3	164.0	194.3	202.4	206.9	227.5
(6) General index of consumer prices	100	104.9	110.9	117.7	132.6	149.5	163.2	174.8	182.7	190.8
(7) Index of consumer prices of energy	100	104.9	106.8	111.8	139.7	161.2	172.1	179.2	180.5	215.8
(8) Total number of fishermen	1 643	1 633	1 607	1 548	1 483	1 439	1 415	1 326	1 275	-
(9) Number of fishing vessels with engines	332	302	284	268	268	255	253	219	216	205
(10) Tonnage of the fishing fleet GRT	31 185	24 061	23 175	22 824	24 042	23 904	24 044	21 002	20 737	20 036
(11) Engine capacity of the fishing fleet (hp)	100 829	86 544	84 773	85 117	91 967	92 566	93 701	83 246	82 355	80 283
(12) Index of number of fishing vessels	100	91	86	81	81	77	76	66	65	62
(13) Index of tonnage	100	77	74	73	77	77	77	67	66	64
(14) Index of engine capacity	100	86	84	84	91	92	93	83	82	80

*Remarks: (8) This official figure is for the number of fishermen (working and unemployed fishermen), the number of fishermen employed on fishing vessels was 1 264, 1 265, 1 189, 1 126, 1 096, 1 072, 1 015, 919, 914 from 1970 to 1978.

Source: EEC Commission documents.

Table 23. Belgian fishing fleet and fishermen, 1979 and 1980

	1980		1979	
	Number	Total GRT	Number	Total GRT
(i) Total vessels with engines	208	21 122	205	20 036
Classification:				
0 - 49.9 GRT	64	2 334	65	2 428
50 - 99.9 GRT	60	5 047	63	5 217,
100 - 149.9 GRT	49	6 063	48	5 913
150 - 499.9 GRT	34	7 123	28	5 923
500 - 999.9 GRT	1	555	1	555
1 000 - 1 999.9 GRT	-	-	-	-
(ii) Total vessels without engines	-	-	-	-
(iii) Total commercial fishermen				
Full-time	894		899	
Part-time	-		-	

Source: OECD.

Table 24. Development of Belgian fleet, 1970-1979

Class		1970	1975	1978	1979
I	Number	68	37	29	27
	hp	8 165	5 253	4 380	4 172
5 - 35 GRT	GRT	1 656	983	796	747
II	Number	95	67	60	55
	hp	18 799	14 289	12 788	11 774
35 - 70 GRT	GRT	4 934	3 418	3 009	2 703
III	Number	139	129	104	100
	hp	50 102	54 394	45 042	44 192
70 - 180 GRT	GRT	14 517	14 114	11 436	11 091
IV	Number	10	20	21	21
	hp	6 403	16 080	17 595	17 595
180 - 400 GRT	GRT	2 234	4 420	4 527	4 526
V	Number	3	2	2	2
	hp	3 550	2 550	2 550	2 550
400 - 1 000 GRT	GRT	1 387	969	969	969
	Number	315	255	216	205
Total	hp	87 019	92 566	82 355	80 283
	GRT	24 728	23 904	20 737	20 036

Source: Administration de la Marine et de la Navigation interieure.

2.7 Fleet development - United Kingdom

Vast changes in the structure and size of the British fishing fleet are apparent even from a cursory examination of trends in vessel numbers and total fleet GRT over the 1970-1978 period. Although vessel numbers rose by 19% to 7 053, Britain still remains in fourth place in the Community league table of vessel numbers. At the same time fleet engine capacity rose by just under 19% to 970 812 hp. But during those nine years total fleet GRT fell by 22% to 226 706 t.

These figures show clearly the trends towards increased numbers of smaller vessels and drastic cutbacks in the size of the large trawler fleet. This restructuring has meant that the UK is the only country within the Community to have undergone a reduction - of 32.1% - in average GRT/vessel (and also the only country where hp/vessel has fallen, although by a lesser degree - 2.96%). The subsequent effect of this same restructuring has been very noticeable in terms of hp/GRT, where the 43% increase to 4.3 hp/1 GRT has been by far the largest in the Community of Nine.

Cutback in larger vessels

Using very broad GRT categories (0-50, 50-500, 500+) the main growth area has been in the under-50 GRT range, where during 1972-78 vessel numbers rose by 13% and GRT by 7%. But expansion has also been apparent at the lower end of the 50-500 GRT range, with vessel numbers up 13% while total GRT fell by 14%. But it has been in the class over 500 GRT where the real cutbacks have been made, with vessel numbers falling by 47% and GRT by 52%, and there have been further cuts since 1978, with many vessels laid up. According to the UK White Fish Authority, at the end of 1980 there were 245 vessels in the deepsea fleet (vessels over 24.5m). These were divided into 110 nearwater vessels (24.4m - 33.5m), 85 middle water vessels (33.5m - 42.7m) and 50 distant water vessels (over 42.7m), of which 20 freshers and 30 freezers.

The main reductions were in the distant water section of the deepsea fleet - at the end of 1975 there were 130 vessels registered, compared with 50 in 1980, as noted above. In 1972 there were 168 distant water vessels. But even within this drastic reduction there was restructuring, with fresher trawlers losing their dominant position to freezers - in 1975 freezers accounted for only 32% of the distant water fleet but in 1979 their share had risen to 66%.

Loss of traditional fishing grounds

The losses in the distant water fleet reflect, as in Germany, the loss of traditional fishing grounds - Canada, Iceland, Norway, Faroes, Barents Sea - and the fact that the largest trawlers over 42m are not really suitable for viable operations near to European coasts. Even of the boats left in the fleet, several are laid up.

The situation has been rather different in the inshore fleet where at the end of 1980 the number reached 1 982 vessels, compared with 1 465 in 1972. It has been said that growth in this sector in the early 70s was stimulated unnecessarily by tax anomalies which encouraged the ploughing back of large profits into many new vessels as a means of avoiding increased taxation.

Fewer inshore seiners

Although there have been increases in the number of purse-seiners in the total fleet (numbering 52 at the end of 1980, the use of purse seiners has fallen back considerably in the inshore fleet, where in 1979 they numbered less than 10 compared with over 20 in 1973-75. The increased use of purse seiners in the deepsea fleet reflects growing concentration on the mackerel fishery.

The age composition of the deep sea fleet changed in 1980. Only 46% of the vessels were in the 16 years or over category at the end of the year compared with 54% at the beginning. There was also a change in the age category with the largest number of vessels. At the end of 1980, the 6 to 10 years category, with 60 vessels, accounted for 25% of the fleet which was the highest recorded percentage. At the end of 1979, the 16 to 20 years category was the largest with 90 vessels or 33% of the total. These changes indicated a real reduction in the average age of the fleet and result from the decline in its numbers in 1980.

Differences in regional age structure

The contrast between the age structures of the Scottish and the English and Welsh fleets remains marked. Less than 36% of the Scottish fleet are in the 21 years and over category compared with 68% in England and Wales and in contrast, 11% of the Scottish vessels compared with 4% of the English and Welsh vessels are in the five years or less category.

2.7.1 Regional structure

The restructuring of the British fleet's operations over the past few years has also had a marked effect on the national distribution of fishing activity. The decline of the distant water fleet has been most felt in ports such as Grimsby, Hull, Fleetwood and Aberdeen. In 1972, 50 distant water vessels were registered in Grimsby but by the end of 1980 the number had dwindled to 9. The picture has been much the same in Hull, where of 65 distant water freshers and 25 freezers in 1972, only 5 freshers and 30 freezers remained in 1980. In Fleetwood over the same period the distant water fleet was cut from 10 to 3 vessels, and in Aberdeen the small distant water fleet disappeared altogether.

In the middle and near water sections of the deepsea fleet the regional trends have been apparent. The decline in these sectors has also been felt by Grimsby and Fleetwood, but there have also been sharp reductions in Aberdeen and Leith. At the same time there has been an increase in the number of deepwater vessels operating out of ports which previously had no fleet of this kind (i.e. ports other than Grimsby, Hull, Lowestoft, Fleetwood, Milford Haven, Northshields, Aberdeen and Leith). This development has been particularly apparent for near water vessels, whose numbers outside the main ports grew from 18 in 1975 to 42 in 1980.

By the same token, the absence of the generally older distant water vessels in these ports means that average age of the vessels there (10 - 12 years in 1980) is considerably less than the average age of the deepsea fleet as a whole - (14 - 15 years). The change reflects the move to larger vessels in some regions.

Impact on ownership

Restructuring of the deepsea fleet and the trend towards smaller vessels has also had an impact on ownership, with the tendency being towards de-monopolisation in England and Wales. In 1976 owners with over 4 vessels accounted for 88% of the deepsea fleet but this share had fallen to 60% by the end of 1979. In Scotland the same trend has been apparent, although there have always been a large number of owners with one vessel in Scotland.

Table 25. United Kingdom: Fishing industry: production - development of prices - fleet and personnel

United Kingdom	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
(1) Landings 1 000 t (landed weight)	975	976	955	1 013	970	869	933	916	956	829
(2) Value of landings 1 000 UK£	76 262	92 634	108 835	152 234	153 696	151 413	209 794	251 642	254 753	253 477
(3) Average value of landings UK£/t	78.2	94.9	114.0	150.2	158.5	174.2	224.9	274.6	266.3	305.8
(4) Index of landings	100	100	97.9	103.9	99.5	89.1	95.7	94	98.1	85
(5) Index of average value of landings	100	121.4	145.7	192.1	202.6	222.1	287.6	351.1	340.5	391
(6) General index of consumer prices	100	109.5	117.2	128	148.5	184.4	215.0	248.9	269.5	305.8
(7) Index of consumer prices of energy	100	110.4	119.0	122	143.2	190.7	236.0	273.4	294.4	324.1
(8) Total number of fishermen	21 651	22 013	22 703	23 476	23 426	22 134	22 022	21 832	22 168	
(9) Number of fishing vessels with engines	5 923	6 069	6 327	6 578	6 916	6 691	6 740	6 953	7 053	
(10) Tonnage of the fishing fleet (GRT)	290 575	291 872	300 305	309 298	303 635	268 467	254 573	246 724	226 706	
(11) Engine capacity of the fishing fleet (hp)	816 827	847 003	895 670	979 196	1034 211	946 750	958 531	1002 763	970 812	
(12) Index of number of fishing vessels	100	102.5	106.8	111.1	116.8	113.0	113.8	117.4	119.1	
(13) Index of tonnage	100	100.4	103.5	106.4	104.5	92.4	87.6	84.9	78.0	
(14) Index of engine capacity	100	103.7	109.7	119.9	126.6	115.9	117.3	122.8	118.9	

Remark: (8) the total number of fishermen both full-time and part-time.
Source: EEC Commission documents.

Table 26. United Kingdom fishing fleet and fishermen, 1979 and 1980

	1980 (Prov.)		1979	
	Number	Total GRT	Number	Total GRT
(i) Total vessels with engines	6 894*	200 807	7 228 a)	208 144
Classification:				
0 - 49.9 GRT	6 246	75 148	6 569	70 435
50 - 99.9 GRT	337	22 918	334	22 383
100 - 149.9 GRT	77	8 898	73	8 557
150 - 499.9 GRT	176	46 896	202	55 222
500 - 999.9 GRT	15	10 618	19	13 178
1 000 - 1 999.9 GRT	28	36 329	30	38 369
2 000 and over	-	-	-	-
(ii) Total vessels without engines	14	29	14	33
(iii) Total commercial fishermen	23 289		21 906	
Full-time	16 716		16 590	
Part-time	6 573		5 316	

a) Includes 1 vessel (under 80 ft in length) of unknown tonnage.

Source: OECD.

Table 27. Disposition of the British deep sea fleet (vessels 80ft and over)

	As at 31st December 1978					As at 31st December 1979				
	NW	MW	DW		Total	NW	MW	DW		Total
			Freshers	Freezers				Freshers	Freezers	
Grimsby	5	31	21	—	57	3	25	13	—	41
Hull	—	—	16	34	50	—	2	6	32	40
Lowestoft	26	34	2	—	62	23	37	2	—	62
Fleetwood	5	9	4	—	18	5	6	5	—	16
Milford Haven	6	—	—	—	6	6	—	—	—	6
North Shields	1	3	—	—	4	4	1	—	—	5
Aberdeen	25	30	1	—	56	21	21	—	—	42
Peterhead	9	1	—	—	10	10	1	—	—	11
Other Ports and Districts	34	4	—	—	38	38	11	—	—	49
TOTAL	111	112	44	34	301	110	104	26	32	272

NW = Near water vessels, (80 – 109.9ft) MW = Middle water vessels (110 – 139.9ft) DW = Distant water vessels (140ft and over)

	As at 31st December 1980					Change in port totals between	
	NW	MW	DW		Total	End '78 and End '80	End '79 and End '80
			Freshers	Freezers			
Grimsby	3	21	9	—	33	–24	– 8
Hull	4	2	5	30	41	– 9	+ 1
Lowestoft	19	25	2	—	46	–16	–16
Fleetwood	3	6	3	—	12	– 6	– 4
Milford Haven	6	—	—	—	6	—	—
North Shields	4	2	—	—	6	+ 2	+ 1
Aberdeen	16	9	—	—	25	–31	–17
Peterhead	13	3	—	—	16	+ 6	+ 5
Other Ports and Districts	42	17	1	—	60	+22	+11
TOTAL	110	85	20	30	245	–56	–27

Source: Based on Fishery Departments' vessel lists

Table 28. Age structure of the British deep sea fleet as at December 31, 1980

Port or District	Age groups (years)						Total
	26 and over*	21–25	16–20	11–15	6–10	5 and under	
Grimsby	—	20	9	2	—	2	33
Hull	1	3	2	12	22	1	41
Lowestoft	4	6	12	13	8	3	46
Fleetwood	2	—	—	—	8	2	12
Milford Haven	—	4	2	—	—	—	6
North Shields	—	1	3	—	—	2	6
Aberdeen	—	11	9	—	—	5	25
Leith	—	—	—	—	1	—	1
Peterhead	1	2	1	1	7	4	16
Fraserburgh	—	—	—	4	5	3	12
Other Ports and Districts	5	5	9	9	9	10	47
TOTAL	13	52	47	41	60	32	245
Percentage of total vessels	5.3	21.2	19.2	16.7	24.5	13.1	100.0

* Includes vessels of unknown age which are assumed 26 and over

Source: Based on Fishery Departments' vessel lists

Table 29. Ownership of deep sea fleet in England and Wales

	As at 31st December 1979			As at 31st December 1980		
	Number of owners	Number of vessels	Cumulative percentage of fleet	Number of owners	Number of vessels	Cumulative percentage of fleet
Over 50 vessels	—	—	—	—	—	—
21–50 vessels	3	82	45	1	30	18
11–20 vessels	1	15	53	3	49	48
5–10 vessels	8	60	86	7	47	77
4 vessels	—	—	86	1	4	80
3 vessels	4	12	92	2	6	83
2 vessels	—	—	92	2	4	86
1 vessel	14	14	100	23	23	100
TOTAL	30	183	—	39	163	—

Source: Based on Fishery Departments' vessel lists

Table 30. Ownership of Scottish deep sea fleet

	As at 31st December 1979			As at 31st December 1980		
	Number of owners	Number of vessels	Cumulative percentage of fleet	Number of owners	Number of vessels	Cumulative percentage of fleet
Over 10 vessels	–	–	–	–	–	–
5–10 vessels	1	10	11	2	14	17
4 vessels	–	–	11	2	8	27
3 vessels	2	6	18	–	–	27
2 vessels	8	16	36	–	–	27
1 vessel	57	57	100	60	60	100
TOTAL	68	89	–	64	82	–

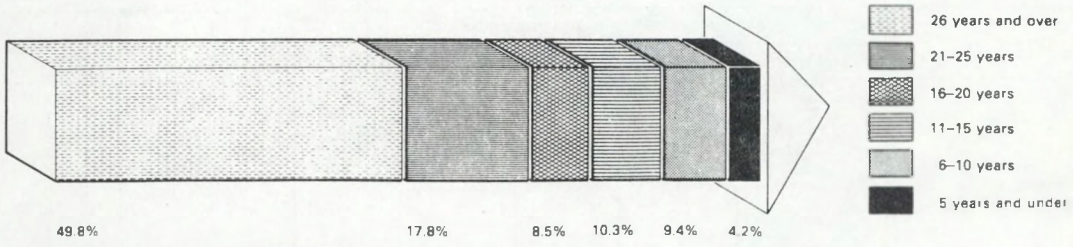
Source: Based on Fishery Departments' vessel lists

Table 31. Age structure of English and Welsh inshore vessels of 40ft - 79.9ft as at December 31, 1980

District	Age groups (years)						Total
	26 and over*	21–25	16–20	11–15	6–10	5 and under	
North East	43	18	10	10	8	4	93
Hull	16	11	10	21	21	13	92
Grimsby	97	49	11	27	35	12	231
East	44	10	5	4	4	5	72
Thames	29	4	4	3	3	—	43
South East	40	10	3	3	1	—	57
South West	118	50	29	27	15	6	245
Wales	33	8	3	1	1	—	46
North West	61	12	7	4	3	1	88
TOTAL	481	172	82	100	91	41	967
Percentage of total vessels	49.8	17.8	8.5	10.3	9.4	4.2	100.0

* Includes vessels of unknown age which are assumed 26 and over

Source: Based on Fishery Departments' vessel lists



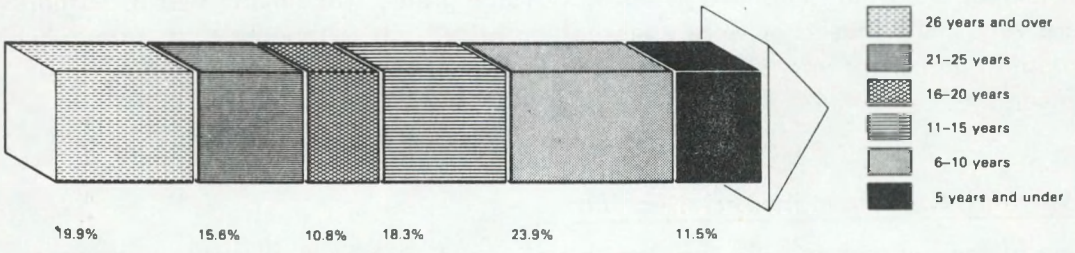
Age structure of English and Welsh inshore vessels, 1980

Table 32. Age structure of Scottish inshore vessels of 40ft - 79ft at at December 31, 1980

District	Age groups (years)						Total
	26 and over*	21–25	16–20	11–15	6–10	5 and under	
Ayr	10	16	14	15	12	4	71
Campbeltown	20	9	13	9	5	—	56
Oban	3	2	3	1	—	—	9
Mallaig	6	3	5	7	7	3	31
Ullapool	5	3	1	3	7	1	20
Stornoway	18	8	9	17	4	—	56
Shetland	14	9	4	8	7	6	48
Wick	8	8	1	4	3	2	26
Lossiemouth	13	19	6	16	23	14	91
Buckie	19	15	10	15	34	17	110
Macduff	13	14	8	17	28	14	94
Fraserburgh	15	14	5	22	23	12	91
Peterhead	10	11	7	13	29	17	87
Aberdeen	1	4	4	10	21	8	48
Arbroath	17	6	4	1	4	—	32
Anstruther	8	5	3	13	14	11	54
Leith	17	8	2	9	11	6	53
Eyemouth	3	1	6	5	9	1	25
Kirkwall	2	3	5	1	2	—	13
TOTAL	202	158	110	186	243	116	1,015
Percentage of total vessels	19.9	15.6	10.8	18.3	23.9	11.5	100.0

* Includes vessels of unknown age which are assumed 26 and over

Source: Based on Fishery Departments' vessel lists



Age structure of Scottish inshore vessels, 1980

Table 32 a) Number of regularly employed fishermen at December 31, 1979 and 1980

	1979		1980	
	Number	Percentage of total	Number	Percentage of total
United Kingdom	16,590	100.0	16,716	100.0
England/Wales	8,377	50.5	8,455	50.6
Scotland	7,613	45.9	7,561	45.2
Northern Ireland	600	3.6	700	4.2
Principal Ports				
Grimsby	1,360	8.2	972	5.8
Hull	822	5.0	822	4.9
Peterhead	751	4.5	744	4.5
Lowestoft	682	4.1	541	3.2
Aberdeen	574	3.5	505	3.0
Fraserburgh	450	2.7	NA	NA
Fleetwood	389	2.3	335	2.0

NA = not available

Sources: MAFF, DAFS, DANI

2.8 Fleet development - Denmark

In tonnage terms the Danish fleet in 1978 ranked fourth in the EEC, although contrary to the trend in other major EEC North Sea fishing nations, tonnage at 142 000 GRT in 1978 was considerably higher than it had been in 1970 (although below the peak level of 149 149 GRT reached in 1976). In terms of vessel numbers the Danish fleet ranked third out of the nine (but second when the Italian fleet is excluded).

As in the Netherlands, there has been a rapid increase in engine power, with total hp increasing by 47% during 1970-77 to 772 404 hp. Most of the increase has been for medium tonnage vessels (+61%) and in the deepsea fishing fleet (+200%). Average GRT/vessel rose by over 80% during 1970-80 to 29.1 GRT, while engine capacity/ vessel was up 35.5% to 103.9 hp during 1970-77. Thus hp/GRT rose to 5.3 from 4.7.

Need to reduce age of fleet

Although during the 1970-77 reference period the number of vessels with engines was generally stable, cutbacks have taken place in the past three years, as shown in table 34 Although full figures are still unavailable on the structure of the Danish fleet, there has been a sharp reduction in the number of small vessels. This will doubtless do something to improve the average age of the fleet, where in 1977 68.8% of all vessels were over 30 years old. However, the problem of obsolete vessels extends beyond the small boat sector, and in 1977, 40 of the 64 vessels over 33m were over 12 years old. The cutbacks in the small vessel fleet have also had an effect on employment, although the impact on fishing capacity is unlikely to be great, since many vessels withdrawn were very small indeed or were even not motorised. It is thought that state-subsidised scrapping grants for very small vessels have played a large part in reducing their numbers.

Diverting vessels from industrial fishing

Some of the overcapacity in the Danish fleet has been created by the decreasing profitability of industrial fishing (for fish meal production), caused by the increase in fuel prices and low world market prices for protein feeds and the declining competitivity of fish meal. This in turn has encouraged dual purpose boats to turn more to fishing for human consumption species, while other boats have been converted for such operations. Given the precarious stocks of food fish in the North Sea and Baltic, this trend results in an increasing number of boats chasing an increasingly scarce resource, so that vessels either tend to operate at less than full capacity or achieve full capacity by taking immature fish.

2.8.1 Regional structure

The main ports of the Danish fishing fleet are Hirtshals, Hanstholm, Thyboroen, Lemvig, Thorsminde, Hvide Sande and Esbjerg on the west coast, Skagen and Frederikshavn in the Skaggerak and Kattegat, and Grenaa, Hundested and Gilleleje in the Sound and Belt Sea and Baltic.

Esbjerg is the main port for industrial fishing and has the largest reduction plant in the country. Industrial fishing is also carried out from Hirtshals, Hanstholm and Thyboroen. Fishing for human consumption is also based on these ports and, in addition, Hvide Sande, Thorsminde and Lemvig.

Table 33. Denmark: Fishing industry: production - development of prices - fleet and personnel

Denmark	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
(1)a)Landings for human consumption (1 000 t landed weight)	221	261	294	247	238	269	309	303	344	
(2)a)Value of landings DKR 1 000	459 384	57 079	697 552	755 375	799 258	829 351	1068 081	1283 272	1346 072	
(3)a)Average value of landings DKR/t	2 081	2 186	2 375	3 053	3 354	3 087	3 461	4 240	3 913	
(4)a)Index of landings	100	118.3	133.0	112.1	107.9	121.7	139.8	137.1	155.8	
(5)a)Index of average values of landings	100	105	114.1	146.7	161.2	148.3	166.4	203.7	188.0	
(1)b)Landings of industrial fishery 1 000 t (landed weight)	968	1 088	1 084	1 166	1 546	1 447	1 539	1 431	1 377	
(2)b)Value of landings 1 000 DKR	294 649	298 406	287 524	764 955	764 955	418 771	624 699	767 007	667 845	
(3)b)Average value of landings DKR/t	304	274	263	448	495	290	406	536	485	
(4)b)Index of landings	100	112.4	113.0	120.4	159.7	149.4	159.0	147.8	142.2	
(5)b)Index of average values of landings	100	90.1	86.5	147.4	162.8	95.4	133.6	176.3	159.5	
(6) General index of consumer prices	100	105.9	112.8	123.3	142.2	155.8	169.8	188.7	207.6	227.5
(7) Index of consumer prices of energy	100	113.7	113.8	130.3	205.8	220.0	238.2	259.2	285.8	
(8) Total number of fishermen	15 457	15 120	14 691	14 745	15 126	15 316	15 229	14 909		
(9) Number of fishing vessels with engines	7 578	7 288	7 140	7 123	7 310	7 444	7 430	7 340		
(10) Tonnage of the fishing fleet (GRT)	119 635	120 661	117 761	119 725	131 254	144 594	149 149	146 294		
(11) Engine capacity of the fishing fleet (hp)	525 328	541 506	546 182	568 389	638 042	715 357	742 459	772 404		
(12) Index of number of fishing vessels	100	96.2	94.2	94.0	96.5	98.2	98.0	96.9		
(13) Index of tonnage	100	100.9	98.4	100.1	109.7	120.9	124.7	122.3		
(14) Index of engine capacity	100	103.1	104	108.2	121.5	136.2	141.3	147		

Remarks: All vessels with engines including vessels with a tonnage of less than 5 GRT, the values in (10) and (11) are estimated from the information for vessels of less than 5 GRT which is only available for 1970 and 1975.
Source: EEC Commission documents.

Table 34. Danish fishing fleet and fishermen, 1976,1977,1980

	31.8.80		1977		1976	
	Number	Total GRT	Number	Total GRT	Number	Total GRT
(i) Total vessels with engines	2 396	125 100	7 331	146 294	7 444	149 149
Classification:						
0 - 49.9 GRT	2 904	53 877	6 752	67 141	6 862	70 293
50 - 99.9 GRT	190	13 763	230	16 636	233	16 806
100 - 149.9 GRT	149	20 366	180	24 666	184	25 195
150 - 499.9 GRT	146	31 499	166	35 851	162	34 709
500 - 999.9 GRT	7	5 595	3	2 000	3	2 146
1 000 - 1 999.9 GRT	-	-	-	-	-	-
(ii) Total vessels without engines	-		2 943		3 199	
(iii) Total commercial fishermen			14 909	15 229	15 229	
Full-time			10 938	11 218	11 218	
Part-time			3 971	4 011	4 011	

Source: OECD

2.8.2 Greenland

Although Greenland has home rule it is still a Danish protectorate. How long this situation will persist is at the moment not clear. 1982 has been set as the year for a referendum on whether or not Greenland should remain within the EEC. If the vote went against EEC membership then some fishing rights would be lost, at least in the long run, to EEC fleets (including Denmark, France and Germany). As far as fisheries is concerned there are voices in Greenland which claim that the country has had a raw deal from the EEC. On the other hand it is reckoned that potential income from the sale of fishing rights to foreign fleets would be less than the aid granted at present by the EEC.

There are now seven stern trawlers in the Greenland fleet. Total catch in 1980 was nearly 90 000 t, of which nearly 50 000 t was cod, live weight. The other main fisheries are for prawn, of which 1980 landings reached 25 000 t, and for salmon (1980 catch 11 946 t). The value of both these fisheries exceeds the value of the cod fishery. Total value of sales of fish and fisheries products in Greenland is over DKR 350M, about half of which is sold through the KGH (Royal Greenland Trade Department), which belongs to the Danish government.

Table 35. Greenland fishing fleet and fishermen, 1979 and 1980

	1980		1979	
	Number	Total GRT	Number	Total GRT
(i) Total vessels with engines	330	14 573	321	12 792
Classification:				
5 - 49.9 GRT	291	4 339	288	4 322
50 - 99.9 GRT	12	826	12	820
100 - 149.9 GRT	7	907	7	907
150 - 499.9 GRT	14	4 172	8	2 414
500 - 999.9 GRT	6	4 329	6	4 329
1 000 - 1 999.9 GRT	-	-	-	-
2 000 and over	-	-	-	-
(ii) Total vessels without engines	n.a.		n.a.	
(iii) Total commercial fishermen	3 000		3 000	
Full-time				
Part-time				

Source: OECD.

2.9 Fleet development - Ireland

The 1970s marked a period of considerable expansion for the Irish fleet, contrary to the trend in most other EEC countries. The potential for expansion becomes apparent when figures for catches in sea areas contiguous to the Irish coast are examined - in 1978 out of 668 000 t taken in these areas the Irish fleet accounted for only 92 000 t. Although other EEC countries have recognised the Irish expansion plans (primarily through the criteria of the Hague Agreement) investment has to some extent been held up by the diminishment of herring stocks and uncertainty about EEC fisheries policy in the long term.

During the 1970-80 period the Irish fleet expanded by 73% in vessel numbers to 1 616 vessels with engines. In addition, for the motorised fleet there was an increase in

tonnage of 110% over the same period to 35 000 GRT. However, almost the entire tonnage of the fleet is concentrated in vessels under 50 GRT, of which there were 1 391 in 1980, while there were a further 203 in the 50 - 150 GRT range. There are also over 1 400 vessels either not motorised or using outboard motors.

Big increase in investment

Investment in the fleet has shown a remarkable advance over the past decade, rising from I£ 5M in 1970 to I£ 53.5M in 1979. Investment onshore has also grown at a comparable pace, although the absolute figure is not so high, and in neither sector has actual investment achieved the tempo set by the Fisheries Development Programme. In sharp contrast to other EEC member states, however, employment in the fleet has increased thanks to the programmed investment.

2.9.1 Regional structure

In terms of catch value, Killybegs (predominantly pelagic catch) is the most important port, followed by Howth (demersal and shellfish for the domestic market), Clogherhead (shellfish), Castletownberre, Rossaveal/Carraroe, Burtonport and Fenit. Fishing activity is spread the length of the Irish coast, although the number of vessels is slightly less on the east coast than elsewhere. Several of the ports above have been the subject of intensive investment projects, and there has been spectacular expansion at Killybegs in both the fleet and onshore facilities.

Table 36. Ireland: Fishing industry: production - development of prices - fleet and personnel

Ireland	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
(1) Landings 1 000 t (landed weight)	77.4	72.6	86.4	85.7	84.6	76.3	88.8	88.3	98.0	
(2) Value of landings 1 000 I£	3 911.4	4 238.4	5 316.4	7 463.8	8 735.6	9 135.2	15 333.2	20 777.1	22 983.7	
(3) Average value of landings I£/t	50.5	58.4	61.5	87.1	103.2	119.8	172.7	235.2	234.4	
(4) Index of landings	100	93.7	111.6	110.7	109.3	98.5	114.6	114.1	126.6	
(5) Index of average values of landings	100	115.6	121.8	172.5	204.3	237.2	342	465.7	464.1	
(6) General index of consumer prices	100	108.9	118.3	131.8	154.2	186.4	219.9	249.9	268.9	304.5
(7) Index of consumer prices of energy	100	109.7	117.9	125.4	183.2	228.1	268.3	307.4	309.4	358.4
(8) Total number of fishermen	5 862	5 801	6 142	6 575	6 696	6 630	7 393	8 179	8 546	
(9) Number of fishing vessels with engines	2 014 (932)	2 041 (952)	2 265 (1 065)	2 347 (1 125)	2 420 (1 159)	2 346 (1 132)	2 462 (1 237)	2 725 (1 358)	2 899 (1 442)	
(10) Tonnage of the fishing fleet (GRT)	16 640	17 911	19 254	20 327	24 186	25 722	27 667	29 826	29 832	
(11) Engine capacity of the fishing fleet (hp)	n.c.	n.c.	n.c.	n.c.	n.c	120 188	120 766	121 510		
(12) Index of number of fishing vessels	100 (100)	101 (102)	112 (114)	117 (121)	120 (124)	116 (121)	122 (133)	135 (146)	144 (155)	
(13) Index of tonnage	100	108	114	122	145	155	166	179	179	
(14) Index of engine capacity	n.c.	n.c.	n.c.	n.c.	n.c.	-	-	-		

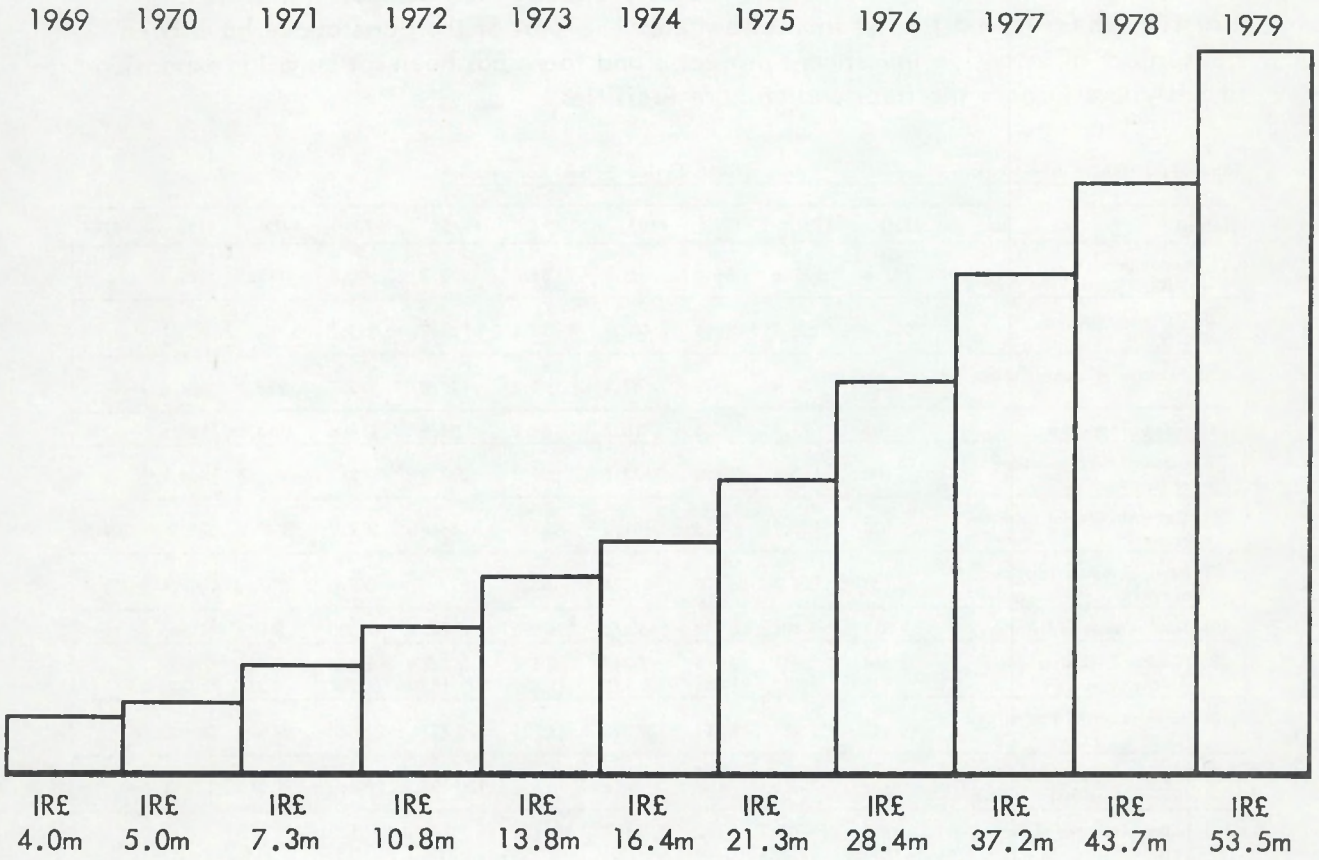
Remarks: (9) the number of vessels in brackets is the number of vessels with fixed engine, the engine capacity and the tonnage relate to all vessels (+/- 4 GRT and +/- 20 hp for vessels without a fixed engine).
Source: EEC Commission documents.

Table 37. Ireland fishing fleet and fishermen, 1979 and 1980

	1980		1979	
	Number	Total GRT	Number	Total GRT
(i) Total vessels with engines	1 616	35 329	1 539	30 370
Classification:				
0 - 49.9 GRT	1 391	13 273	1 336	12 748
50 - 99.9 GRT	157	10 954	150	10 466
100 - 149.9 GRT	46	5 328	40	4 564
150 - 499.9 GRT	18	3 645	13	2 592
500 - 999.9 GRT	4	2 129	-	-
1 000 - 1 999.9 GRT	-	-		
(ii) Total vessels without engines	1 451	n.a.	1 426	n.a.
(iii) Total commercial fishermen	8 824	-	8 711	-
Full-time	3 485	-	3 299	-
Part-time	5 339	-	5 412	-

Source: OECD

Investment in Irish fishing fleet



Source: Irish Sea Fisheries Board

3. DEVELOPMENT OF CATCHES

3.1 EEC

Despite the decline in the gross tonnage of the EEC fleet over the past 10 years, total catches (live weight) increased by 7.2% during 1970-78 for the EEC as a whole, with the largest growth taking place in Denmark and Ireland, while Dutch, Italian and French catches grew moderately. There were modest declines for Belgium and the United Kingdom, although in the latter case there has been further decline over the past two years. For Germany catches slumped dramatically by 33%.

But such comparisons fail to give a reliable picture of developments, since catches for industrial use are included and changes in supply and catching grounds of the main human consumption species are not apparent. Thus it seems appropriate to give a brief analysis of the way in which catches of key species have changed during the 1970s in each of the member states. In the following section it should be noted that figures refer to live weight, and that all catches made by vessels of one state are attributed to that country even if landed abroad. Likewise, fish landed in one country by foreign vessels is not attributed to the country of landing. Figures refer to 1970 and 1978.

3.2 Germany

Cod: Catches in the North-West Atlantic (Area 21) fell rapidly from 66 000 tonnes in 1970 to 27 000 t in 1978. The decline in the North-East Atlantic (Area 27) has been less spectacular, with catches falling from 88 000 t to 70 000 t. Main losses have been in catches from the Barents Sea, Iceland and North-East Greenland (total loss around 40 000 t), but there have been increases in the North Sea (plus 18 000 t to 37 000 t), Baltic, Norwegian Sea and Spitzbergen.

Saithe: Catches in Area 21 have more or less disappeared, representing a loss of about 3 000 t. In Area 27 catches have fallen by around 25% to 46 000 t. Losses of around 28 000 t from Iceland have been partially compensated by quadrupling the North Sea catch to 26 000 t. There have also been smaller losses in the Barents and Norwegian Seas.

Whiting: This has never been a popular species in Germany, although considerable catches are made by other member states.

Haddock: Much the same is true of haddock. Catches have only declined slightly over the period to just over 4 000 t in 1978, although in the mid-seventies catches rose briefly to the 28 000 t mark.

Redfish: Germany has traditionally taken the bulk of the EEC catch of this species in Area 21, where catches have fluctuated around 6 000 - 7 000 t, although they reached 30 000 t in 1977. The Area 27 catch has dropped by about one-third from its 1970 level to 42 000 t in 1978. Here too the German fleet takes the greater part of the EEC catch. There has been an increase in effort in the Norwegian Sea to offset the 48 000 t loss in Iceland. Catches also increased on the Faroe Plateaux and off East Greenland.

Plaice: Catches have remained more or less constant at about 5 000 t in Area 27, while catches have risen to just over this level in Area 21, although no American plaice was being taken by the German fleet there at the beginning of the 1970s.

Herring: With the decline of the North Sea herring stock, catches from Area 27 were decimated to just over 8 000 t in 1978, and the bulk of that comes from the Baltic, Skagerrak and Kattegat fisheries. Catches in Area 21 have been reduced to zero from 94 000 t in 1970.

Mackerel: The fishing fleet has transferred effort from herring to mackerel, at least in Area 27, where catches have risen from 1 000 t to 29 000 t, almost all of which comes from the Southern Coast of Ireland.

Table 38. Germany: Landings and values, 1979 and 1980

	1980		1979	
	1 US $ = 1.8165 DM		1 US $ = 1.90 DM	
	Quantity '000 t (landed)	Value (Million US $)	Quantity '000 t (landed)	Value (Million US $)
Total landings	199.4	161.6	231.7	172.9
For direct human consumption	142.1	132.2	172.3	146.1
Species (fresh)	83.8	67.4	93.6	71.3
Cod	34.0	24.8	32.4	23.1
Haddock	1.5	1.2	1.4	1.2
Saithe	11.0	8.7	16.5	10.8
Redfish	19.0	18.5	27.3	24.2
Plaice	2.5	2.4	2.3	2.2
Herring	8.6	3.6	6.2	2.6
Other	7.2	8.2	7.5	7.2
Frozen (all species)	58.3	64.8	78.7	74.8
For other purposes	31.7	9.6	39.9	9.8
Fodder shrimps	1.9	0.1	5.1	0.3
Fish meal	18.3	7.7	20.6	7.2
Fish oil	3.4	1.4	4.1	1.6
Other	8.1	0.4	10.1	0.7
Shellfish (crustaceans and molluscs)	25.6	19.8	19.5	17.0
Shrimps	13.0	16.9	12.3	15.5
Mussels	12.6	2.9	7.2	1.5
Other	-	-	-	-

Source: OECD.

3.3 France

Cod: Along with Germany, France has accounted for the bulk of EEC cod catches in Area 21, since the United Kingdom catch in that area declined in the late sixties. French cod catches there are now considerably higher (27 000 t) than those of Germany, having fallen relatively little (from 66 000 t) from their 1970 level. Area 27 catches were halved over the 1970-78 period to about 38 000 t. There have been sharp reductions in the Barents Sea (loss of 32 000 t since 1971) and in the North Sea, where catches have fallen from 25 000 t in 1971 to 12 000 t in 1978, although 1971 was a freak year, and catches were lower in general both before and after 1971-72. There has been a modest increase in catches off North-West Scotland.

Saithe: During the period in question French catches rose in Area 27 from 69 000 t to 74 000 t although average catches were over 80 000 t. Since then catches of this species, which is very popular in France, have fallen back further.

Whiting: The French also take a large catch of this species, although the United Kingdom and Denmark take still more. In 1978 catches by France were 45 000 t, 5 000 t more than in 1970. North Sea catches have fallen slightly but there has been an increase in those in the Channel.

Haddock: Catches have fallen by about one quarter to 13 000 t, with North Sea catches being halved to 5 000 t, and a further 5 000 t being lost in the North-West coast of Scotland, the Irish Sea and the southern Irish coast. Minor improvements in other areas have helped compensate.

Redfish: The French take no part in this fishery.

Plaice: The relatively minor catches of plaice have fallen by around 20% to 3 800 t.

Herring: Apart from a brief spell in the mid-seventies in the North-West Atlantic, most French herring has traditionally come from Area 27, where catches have fallen from 24 000 t to 4 000 t, mostly from the North Sea and the Channel.

Mackerel: Catches fluctuated in the seventies, with the average catch around 40 000 t. Catches have fallen back since. Main grounds are the Channel, southern coast of Ireland and the Bay of Biscay.

Hake: Especially popular on the French market, France takes about 80% of the total EEC catch of this species. 1978 catch by France was 20 000 t, down from 26 000 t in 1975. The bulk is taken in the Bristol Channel, the southern coast of Ireland and the Bay of Biscay, and some in the Mediterranean.

Tuna: Catches fluctuate widely, and reached 55 000 t (landed weight) in 1978. Much of the catch comes from the west coast of Africa. Since 1978 catches have improved, partly due to expansion and modernisation of the tuna fleet.

Table 39. France: Landings and values, 1979 and 1980

	1980		1979	
	Quantity tonnes (landed weight)	Value '000 FF	Quantity tonnes (landed weight)	Value '000 FF
Total landings	743 290	4 227 540	713 620	3 758 442
For direct human consumption	702 296	4 240 640	677 589	3 754 588
Fish	460 363	2 765 260	432 538	2 378 662
of which:				
Hake	22 256	310 456	18 832	268 674
Saithe	47 609	185 701	51 753	186 495
Whiting	38 528	138 347	40 480	139 258
Cod	33 992	270 362	30 859	219 994
Mackerel	27 543	52 484	35 030	61 319
Anglerfish	18 169	169 203	15 449	135 250
Sole	4 433	132 920	4 090	109 109
Tropical tuna	66 338	380 773	55 208	257 054
Molluscs and crustaceans	243 477	1 447 293	245 051	1 437 060
of which:				
Portuguese oysters	95 165	453 565	100 285	482 931
Mussels	72 717	189 069	61 861	160 904
Scallops	16 080	130 586	15 960	111 800
Crab	9 866	72 856	9 900	63 683
Norway lobster	9 778	188 942	9 440	173 096
For other purposes (reduction to meal and oil)				
Seaweed	35 248	7 707	35 624	9 869
Aquatic plants	1 672	158	2 523	278
Fish meal	2 046	4 324	2 193	3 796
Fish oil	28	49	30	57

Source: OECD.

Table 40. French production in 1979 - Sea fisheries

	Tonnes	'000 F		Tonnes	'000 F
Fresh products			Frozen products		
Anadromous fish	2 463.8	56 141.2	Distant-water fishing		
Round ground fish	254 889.4	1 441 113.7	Fish	11 396	100 545
Flat fish	30 777	304 779.9	Molluscs	2 873	7 180
Seasonal fish	84 198.6	210 740	Crustaceans	346	4 561
Total fish	372 328.8	2 012 774.8	Meal	2 193	3 796
Crustaceans	28 675.5	388 959.6	Oil	30	57
Oysters	105 917.0	591 618.0	Total	16 838	116 139
Molluscs	40 661.8	237 362.6	Tropical tuna	47 725	228 545.3
Mussels	61 861.0	160 904	Salted products		
Sea urchins, "violets" etc.	61 861.0	160 904	Distant-water fishing	1 088	8 288
Coral	2.4	1 416.9			
Seaweeds	35 624	9 869.5			
Aquatic plants	2 523.7	278			
Total fresh	647 966.9	3 405 560.3	Grand total	713 617.9	3 758 441.6

Source: OECD.

Table 41. French production in 1980 - Sea fisheries

	Tonnes	'000 F		Tonnes	'000F
I. Fresh fish			C. Molluscs	41 311	281 406
A. Fish	384 537	2 262 971	Scallops	16 080	130 586
Diadromous fish	2 393	56 613	Cockle	5 183	8 831
Eels	1 989	50 068	Quahaug	4 329	23 248
Sea fish	382 144	2 206 358	Squid	3 024	42 097
Cod	21 661	132 723	Cuttlefish	2 852	19 291
Haddock	10 633	35 190	D. Molluscs farming	172 052	725 253
Pollack	6 288	46 528	Common oyster	4 170	82 619
Saithe	45 827	171 663	Oyster	95 165	453 565
Ling	9 306	43 096	Mussels	72 717	189 069
Blue ling	7 331	24 528	E. Echinoderms	456	2 749
Whiting	38 528	138 347	F. Seaweeds	36 920	7 865
Hake	22 256	310 456			
Pout	7 849	16 335	II. Frozen products		
Anglerfish	18 169	169 203	A. Fish	74 561	491 059
Gurnard	5 105	23 924	Cod	11 152	126 908
Horse mackerel	5 897	8 935	Saithe	1 726	13 696
Dogfish	8 407	28 924	Herring	1 519	6 834
Brown cat shark	4 970	14 455	Blue whiting	984	4 480
Black sea bream	3 737	39 267	Mackerel	190	271
Pink dorade	1 906	32 309	Yellowfin tuna	38 655	252 875
Redfish	2 101	6 591	Skipjack	19 246	79 872
Megrim	6 503	57 261	Bigeye tuna	284	1 228
Plaice	4 992	15 719	B. Crustaceans	355	6 470
Sole	4 433	132 920	Deep-sea shrimp	295	4 233
Thornback ray	2 067	17 549	Crawfish	40	2 237
Anchovy	4 009	10 207	C. Molluscs	372	1 260
Herring	5 498	13 805	Squid	372	1 260
Sprat	4 050	7 908			
Sardine	39 061	74 760	III. Salted products		
Albacore	3 129	36 483	A. Fish	1 265	11 230
Mackerel	27 344	52 213	Cod	1 179	10 731
Tropical tuna	8 153	46 798	Saithe	56	342
Red tuna	1 683	20 205	Herring	19	63
B. Crustaceans	29 407	432 904	IV. Industrial products	2 074	4 373
Spider crab	5 209	38 436	Oil	28	49
Edible crab	9 866	72 856	Meal	2 046	4 324
Norway lobster	9 778	188 942			
Brown shrimp	1 225	23 450			

Source: OECD.

3.4 Italy

Italy's catches are concentrated in other areas than those of the rest of the Community. Main catch areas are Eastern Central Atlantic (Area 34), Mediterranean Sea (Area 37), and North-East Atlantic (Area 27). Catch composition is also very different.

Anchovy: Catches from the Mediterranean, although prone to fluctuation, averaged around 50 000 t (landed weight) each year until 1978. In the last two years the average has been closer to 80 000 t.

Pilchard: Mediterranean catches rose from about 45 000 t in 1970 to 53 000 t in 1978.

Hake: Catches from the Mediterranean rose moderately to around 15 000 t.

Sole: Catches from the Mediterranean were more or less constant at just under 3 000 t.

Tuna: Catches are subject to changes, but average around 2 000 t a year (landed weight).

Sardine: Catches from the Mediterranean have levelled out at around 50 000 t annually (landed weight).

Other main species caught by the Italian fleet include grey mullet, eel, sole, mullet, bass and mackerel.

Table 42. Italy: Landings and values, 1979 and 1980

	1980		1979	
	Quantity tonees (landed weight)	Value 1 000 000 lires	Quantity tonnes (landed weight)	Value 1 000 000 lires
Total landings	447 530	641 013	432 295	518 326
For direct human consumption (a)	398 889	612 276	379 682	494 047
of which:				
Fresh, chilled fish	259 056	369 894	265 495	304 518
Frozen fish (b)	37 530	39 407	31 275	32 972
Fresh, chilled molluscs	68 984	105 514	53 946	78 421
Frozen molluscs	14 490	17 388	10 350	12 394
Fresh, chilled crustaceans	15 318	72 875	15 690	59 770
Frozen crustaceans	7 198	3 511	2 926	5 972
For other purposes	48 641	28 737	52 613	24 279

(a) Including quantities processed to obtain salted, dried, smoked, etc. products.
(b) Ocean fishing.

Source: OECD.

3.5 Netherlands

All catches are from the North-East Atlantic (Area 27).

Cod: Catches rose steadily from 25 000 t in 1970 to 49 000 t in 1978. Almost the entire catch comes from the southern and central North Sea.

Saithe: Catches slumped from their 1970 peak of 21 000 t to 6 000 t in 1978. The bulk comes from the northern North Sea.

Whiting: After a brief period of growth in the mid-seventies, catches have settled at around 11 000 t, little above their 1970 level. Southern and central North Sea are the main fishing grounds.

Haddock: Here too catches plummeted from 8 500 t in 1970 to 900 t in 1978, mostly from the central North Sea.

Redfish: No directed fishing for this exists in the Netherlands.

Plaice: Catches fell off by about one-quarter to 32 000 t in 1978, although catches in the intermediate period were considerably higher at over 50 000 t. The bulk comes from the North Sea, with a smaller quantity from the Kattegat and Skagerrak.

Herring: Once a mainstay of Dutch fisheries, catches dwindled to 8 000 t in 1978 from 58 000 t in 1970 and a peak of 73 000 t in 1973. Once concentrated in the North Sea, the depletion of stocks and the resulting ban pushed the fishery to the North-West of Scotland and southern Ireland.

Mackerel: Effort has been transferred from herring to mackerel and catches over 1970-78 increased by about 750% to 52 000 t, and there have been further increases since then. Effort has tailed off in the North Sea in favour of the English Channel, Bristol Channel and the southern coast of Ireland, whence the bulk of the catch now comes.

Sole: The Dutch fleet has traditionally taken a large share of the EEC catch of this high-value species, which in 1978 accounted for 18% of total Dutch landed value although only 2.3% of landed weight. But catches have dwindled, amounting to only 7 000 t in 1978 down from 16 000 t in 1970, and 25 000 t in the mid and late sixties.

Other flatfishes of importance to the Dutch fleet in particular are dab, turbot, flounder.

Table 43. Netherlands: Landing sold for human consumption, 1979 and 1980

	1980 (1)			1979		
	Quantity (landed weight) x 1 000 kg	Value Dutch guilders x 1 000 fls	Average price cts/kg	Quantity (landed weight) x 1 000 kg	Value Dutch guilders x 1 000 fls	Average price cts/kg
Roundfish	55 245	106 759	193	45 567	87 034	191
of which:						
Haddock	1 500	2 377	158	1 134	2 038	180
Cod	39 200	80 220	205	29 734	60 901	203
Saithe	730	1 628	223	1 815	3 262	180
Whiting	11 475	15 764	137	10 669	14 451	136
Other	2 340	6 770	289	2 215	6 382	288
Flatfish	50 187	210 736	420	53 227	216 788	408
of which:						
Plaice	35 048	67 761	193	35 573	73 223	206
Dab	4 623	6 010	130	4 243	5 559	131
Sole	5 885	92 079	1 565	7 387	98 700	1 336
Other	4 631	44 886	969	6 024	39 306	652
Herring etc.	28 464	24 001	84	36 469	32 185	89
of which:						
Fresh	2 500	5 107	204	3 003	7 435	248
Salted	25	50	200	80	135	169
Other	25 939	18 844	73	33 386	24 615	74
Mackerel	85 000*	63 750	75	60 895*	50 030	83
Ray-like fish	420	1 079	257	719	1 407	196
Freshwater fish	1 668	10 220	613	2 251	11 472	510
of which:						
Eel	664	7 603	1 145	531	6 765	1 275
Other	1 004	2 617	261	1 720	4 707	274
Shellfish	72 730	81 481	112	90 893	80 674	89
of which:						
Oysters	751	11 713	1 560	1 075	14 519	1 351
Mussels	66 932	53 475	80	84 708	50 110	60
Shrimps	4 935	16 018	325	5 022	15 889	317
Other	112	275	246	88	156	177
Grand total for human consumption	293 714	498 026	170	290 021	479 590	165

(1) Provisional figures. * Mainly horsemackerel.

Source: OECD

Table 44. Dutch landings by fleet division 1974 - 1980 (tonnes) [1]

	1974	1975	1976	1977	1978	1979	1980 [2]
Landings ('000 t):							
- Inshore and coastal fleet [3]	120.3	119.5	113.5	114.1	126.1	132.9	145.7
- Middle distance fleet	72.9	83.7	71.4	69.0	82.0	103.6	126.9
Total sea fishing	193.2	203.2	184.9	193.1	208.1	236.5	272.6
- Mussels	85.8	97.5	63.7	95.1	103.0	84.7	66.9
- Oysters	1.2	1.4	1.3	1.2	1.1	1.1	0.7
- Others	1.9	0.8	0.4	0.2	0.6	0.5	0.5
Total	282.1	302.9	250.3	279.6	312.8	322.8	340.7
Landings (HFL M):							
- Inshore and coastal fleet [3]	287.7	307.1	321.0	326.4	368.2	420.8	435.4
- Middle distance fleet	93.9	98.9	97.4	97.3	86.0	86.3	98.2
Total sea fishing	381.6	406.0	418.4	423.7	454.2	507.1	533.6
- Mussels	20.0	28.5	29.2	24.9	37.1	50.1	53.5
- Oysters	10.3	13.0	15.5	15.6	15.5	14.5	11.0
- Others	1.2	1.2	1.0	0.2	0.4	0.5	0.7
Total	413.1	448.7	464.1	464.4	507.2	572.2	598.8

1) Including landings in Belgium, UK, Denmark and Germany; 2) Provisional; 3) Including shrimp fleet.
Source: CBS, LEI.

Table 45. Netherlands: Landings by major fishing grounds, 1979-80

	Total		of which									
			North Sea						North West coast of Scotland & N. Ireland		West and South Irish coast	
			North		Centre		South					
	1979	1980	1979	1980	1979	1980	1979	1980	1979	1980	1979	1980
Total (1 000 kg)	202 817	232 356	1 645	223	46 516	51 831	50 485	52 461	21 165	16 714	34 611	59 864
Roundfish	45 387	54 859	1 500	215	15 108	21 387	25 156	27 651	328	80	124	310
- haddock	1 133	1 317	172	39	519	866	78	196	1	2	14	-
- cod	29 725	39 162	81	9	10 510	17 001	17 328	18 823	16	1	-	5
- saithe	1 814	728	1 152	151	24	25	6	7	206	74	12	67
- whiting	10 668	11 708	66	11	3 591	3 043	6 437	7 569	12	1	2	4
Flatfish	53 207	49 289	53	0	29 063	27 170	21 283	20 648	1	0	-	-
- plaice	35 567	34 442	42	0	20 647	20 127	12 812	13 268	1	-	-	-
- dab	4 241	4 428	1	-	1 463	1 269	2 715	3 125	0	-	-	-
- sole	7 384	5 866	4	-	3 743	3 142	3 219	2 531	-	-	-	-
Herring types	36 440	32 524	3	-	11	5	72	543	7 795	3 359	14 145	15 511
- fresh	3 003	2 625	3	-	1	0	10	431	907	476	1 724	1 555
- salted	80	31	-	-	-	-	-	21	-	-	44	10
- horsemackerel	30 919	24 493	-	-	9	4	61	79	6 644	2 293	11 696	11 165
Mackerel	60 895	88 181	55	1	238	140	593	565	12 826	13 218	19 919	43 576
Rays	719	460	9	2	359	180	318	260	6	0	2	8
Shellfish & crustaceans	3 102	2 613	3	-	952	1 020	1 988	1 447	0	-	-	-
- shrimps	3 014	2 514	3	-	907	977	1 949	1 392	-	-	-	-
Not for human consumption	3 068	4 430	22	5	785	1 928	1 074	1 346	209	56	422	460
Total (1 000 HFL)	399 162	420 191	2 725	366	150 306	159 931	145 988	148 196	19 782	13 401	30 692	47 159
Roundfish	85 454	104 672	2 472	357	26 757	36 418	48 818	56 377	522	134	287	418
- haddock	2 036	2 203	277	58	938	1 322	178	428	3	5	21	-
- cod	60 885	80 426	168	20	19 752	29 815	37 083	43 201	24	2	-	8
- saithe	3 262	1 622	1 837	244	47	43	12	11	335	117	19	111
- whiting	14 450	16 132	111	18	4 699	3 899	8 682	10 445	15	2	1	6
Flatfish	216 662	208 066	169	2	119 007	117 774	87 131	83 789	1	0	-	-
- plaice	73 208	68 236	81	0	43 282	40 338	25 932	25 831	1	-	-	-
- dab	5 558	5 715	2	-	1 934	1 539	3 548	4 135	0	-	-	-
- sole	98 663	91 687	39	-	50 560	49 714	43 582	39 173	-	-	-	-
Herring types	32 130	27 507	4	-	8	5	61	457	7 451	3 317	13 736	13 856
- fresh	7 435	5 738	4	-	2	1	18	364	2 290	1 236	4 422	3 733
- salted	135	57	-	-	-	-	-	23	-	-	95	34
- horsemackerel	22 882	17 900	-	-	6	4	41	51	4 987	1 658	8 752	8 138
Mackerel	50 029	66 155	42	1	162	106	497	470	11 736	9 922	16 502	32 647
Rays	1 407	1 206	16	3	619	390	718	778	4	1	4	15
Shellfish & crustaceans	11 477	9 351	6	-	2 971	3 310	8 018	5 513	1	-	-	-
- shrimps	11 322	9 109	6	-	2 875	3 197	7 965	5 385	-	-	-	-
Not for human consumption	2 001	3 234	16	3	782	1 928	745	812	67	28	163	223

Source: CBS.

3.6 Belgium (only Area 27)

Cod: Catches increased from 12 000 t in 1978 (i.e. much along the lines of the increase in Dutch catches). Most effort is now concentrated in the North Sea (central and southern), while catches in Iceland fell from 3 000 t to 1 300 t. Catches off the Faroes have declined from 13 000 t to 3 000 t.

Saithe: Catches have fallen from 5 000 t to 1 000 t, with most of the catch still coming from Iceland.

Whiting: Catches have been more or less static at 3 000t - 4 000 t annually, most of the catch now being taken close to Belgian ports in the southern North Sea.

Haddock: Catches were halved to just over 2 000 t, again mostly from the southern North Sea with some from Iceland.

Redfish: Catches were already declining in 1970, and in 1978 only 1 500 t were taken, from Iceland.

Plaice: Contrary to the general EEC trend, catches increased slightly to 6 800 t in 1978, from the southern and central North Sea.

Herring: Of little importance in the Belgian catch.

Mackerel: Of little importance in the Belgian catch.

Sole: Although catches fell by 25% to 3 000 t in 1978, this species represents around 30% of Belgian landed value.

Table 46. Belgium: Landings, 1979 and 1980 - tonnes (live weight)

	Belgium		Other countries		Total	
	1980	1979	1980	1979	1980	1979
White fish						
Haddock	1 239	1 087	1 369	713	2 608	1 800
Cod	8 879	12 118	2 337	3 006	11 216	15 124
Saithe	700	756	315	248	1 015	1 004
Whiting	3 275	4 138	106	103	3 381	4 241
Plaice	5 205	4 825	2 853	3 402	8 058	8 227
Sole	3 638	3 712	109	116	3 747	3 828
Skate	1 373	1 555	74	74	1 447	1 629
Redfish	1 189	1 291	192	94	1 381	1 385
Others	6 340	6 212	944	903	7 284	7 115
Total	31 838	35 964	8 299	8 659	40 137	44 353
Pelagic fish						
Herring	1 030	3	-	-	1 030	3
Sprat	1	1	-	-	1	1
Others	1 556	28	-	-	1 556	28
Total	2 587	32	-	-	2 587	32
Crustaceans and molluscs						
Shrimps	1 162	1 136	170	193	1 332	1 329
Norway lobster	593	312	-	-	593	312
Others	945	1 082	7	17	952	1 099
Total	2 700	2 530	177	210	2 877	2 740
Grand total	37 125	38 256	8 476	8 869	45 601	47 125

Source: OECD.

3.7 United Kingdom

Cod: Catches in Area 21 have slumped since the early seventies, when they briefly reached 13 000 t in 1972, although the average for the 1970-75 period was only just over half of this. By 1978 catches had declined to less than 1 000 t out of a total 35 000 t catch by the EEC as a whole.

Along with Germany and France, the United Kingdom has suffered considerable cod losses in the North-East Atlantic also, falling from 408 000 t in 1970 to 151 000 t in 1978 and with a further decline since then. Not surprisingly, some of the largest declines have been in grounds now subject to foreign 200-mile zones - Barents Sea (-98 000 t), Norwegian Sea (-30 000 t), Iceland (-130 000 t), Faroes (-10 000 t). There have also been losses in Spitzbergen (-10 000 t). Part of the loss has been made good by increased effort in the North Sea, where catches increased from 68 000 t to 101 000 t, roughly in line with the increase in EEC catches of cod in that subdivision.

Saithe: North-West Atlantic catches are insignificant. Catches in the North Sea decreased from 58 000 t to 36 000 t in 1978, slightly more than the decline in EEC catches of the same species. Again main losses were in the Barents Sea (-6 000 t), Norwegian Sea (-6 000 t), Iceland (-13 000 t), Faroes (-9 000 t). Catches in the North Sea increased from 8 000 t to 23 000 t and off the North-West of Scotland remained more or less constant at around 8 000 t.

Whiting: Catches of this species from the North-East Atlantic almost doubled to 65 000 t in 1978, most of which comes from the North Sea, with the rest coming from the North-West coast of Scotland and the Irish Sea.

Haddock: United Kingdom catches, almost entirely from Area 27, slipped back rapidly from a peak of just over 200 000 t at the beginning of the seventies to 94 000 t in 1978, with losses in the Barents Sea, Norwegian Sea, Iceland and Faroes running to 31 000 t. North Sea catches fell from 132 000 t to 70 000 t, the same percentage loss as for the EEC in that region.

Redfish: Not important for the United Kingdom market.

Plaice: Catches, all in the North-East Atlantic, showed a decline of around 15 000 t to 36 000 t, slightly above the rate of decline in EEC catches. Always concentrated on the North Sea, most of the decline has taken place in those fishing grounds.

Herring: Once the backbone of large sections of the Scottish fleet, catches tumbled to 23 000 t from 155 000 t. In the North Sea 32 000 t was lost due to the herring ban, 90 000 t in NW Scotland and 8 000 t in the Irish Sea.

Mackerel: The increase in the catch of this species has been phenomenal, rising from only 5 000 t in 1970 to 321 000 t in 1978, with the bulk of the increase coming in 1976-78 as herring stocks showed increasing signs of being over-fished. Previously catches had been made on a major scale only by the French and the Danes (for meal). But the British by 1978 accounted for two-thirds of the EEC mackerel catch. Scottish vessels took over 100 000 t from the NW of Scotland fishery, with the remainder being

taken by the English and Welsh fleet in the English Channel and Bristol Channel. Unfortunately mackerel has a relatively low average price, but provides income for the inshore industry, with much of the fishery being inside the 12-mile zone.

Sprat: Catches of this species trebled over the period in question to 102 000 t, with most of this coming from the North Sea and some from NW Scotland.

Table 47. United Kingdom: Landings by British vessels and first hand values, 1979 and 1980

	1980		1979	
	Quantity tonnes (landed weight)	Value £	Quantity tonnes (landed weight)	Value £
Total landings	790 600	225 445 400	836 024	254 053 097
For direct human consumption (C)	607 600	185 140 400	708 584	211 847 838
Cod	103 900	58 190 400	108 891	63 537 460
Haddock	80 700	33 319 500	72 000	35 834 675
Plaice	25 600	12 974 300	31 986	17 117 819
Saithe	14 700	4 653 900	18 715	5 999 095
Whiting	55 500	16 570 000	60 415	19 163 449
Other demersal	52 000	30 110 200	55 361	30 077 426
Total demersal (A)	332 400	155 818 300	347 368	171 729 924
Herring	6 000	1 849 800	4 522	1 895 881
Mackerel	236 500	24 755 500	331 142	35 987 816
Sprats	18 800	1 517 300	15 293	1 173 522
Other pelagic	13 900	1 199 500	10 259	1 060 695
Total pelagic (B)	275 200	29 322 100	361 216	40 117 914
For other purposes (F)	106 100	4 327 500	63 159	2 396 598
Demersal - all species (D)	42 400	1 358 900	20 268	623 262
Mackerel	36 700	1 813 700	22 308	976 120
Sprats	4 500	297 700	16 392	659 947
Other pelagic	22 500	857 200	4 191	137 269
Total pelagic(E)	63 700	2 968 600	42 891	1 773 336
Shellfish (G)	76 900	35 977 500	64 281	39 808 661

(A) + (B) = (C); (D) + (E) = (F); (C) + (F) + (G) = (H)
* Est.
Source: OECD

Table 48. UK: Quantity, value and source of white fish (other than shellfish) landed in the United Kingdom, 1979 and 1980

	Weight (a)		Value	
	1979	1980	1979	1980
	Tonnes	Tonnes	£'000	£'000
British Landings				
England and Wales	436,628	334,336	112,871	90,355
Scotland	324,670	341,555	97,658	93,298
Northern Ireland	5,959	7,639	1,856	2,035
Imports (Fresh and Frozen)	304,088	312,814	153,155	148,140
TOTAL SUPPLIES	1,071,345	996,344	365,540	333,828

(a) All supplies of fillets and other boneless fish are expressed in terms of landed weight equivalent

Sources: Fishery Departments' and HM Customs and Excise Statistics

Table 49. UK: Landings and values of white fish (excluding shellfish) by vessel groups, livers have been excluded, 1979 and 1980

	Weight (a)		Value		Weight		Value	
	1979	1980	1979	1980	1979	1980	1979	1980
	Tonnes	Tonnes	£'000	£'000	Per cent	Per cent	Per cent	Per cent
Demersal								
140ft and over								
England and Wales	32,163	27,562	14,135	8,855	3.0	2.8	3.9	2.7
Scotland	••	••	••	••	••	••	••	••
	32,163	27,562	14,135	8,855	3.0	2.8	3.9	2.7
80 to 139.9ft								
England and Wales	50,037	41,453	26,884	21,097	4.7	4.2	7.4	6.3
Scotland	30,477	37,110	12,473	9,337	2.8	3.7	3.4	2.8
	80,514	78,563	39,357	30,434	7.5	7.9	10.8	9.1
Under 80ft								
England and Wales	76,869	77,073	43,027	41,925	7.2	7.7	11.8	12.6
Scotland	172,814	192,905	73,974	74,818	16.1	19.4	20.2	22.4
Northern Ireland	5,934	7,577	1,854	2,028	0.6	0.8	0.5	0.6
	255,617	277,555	118,855	118,771	23.9	27.9	32.5	35.6
Pelagic (excluding herring)								
England and Wales	276,661	188,126	28,742	18,475	25.8	18.9	7.9	5.5
Scotland	121,378	111,541	11,211	8,776	11.3	11.2	3.1	2.6
Northern Ireland	25	60	2	5	•	•	•	•
	398,064	299,727	39,955	27,256	37.1	30.1	11.0	8.1
Total British landings	766,358	683,407	212,302	185,316	71.5	68.7	58.2	55.5
Foreign caught landed by								
Fishing vessels	92,490	99,364	41,429	38,018	8.6	10.0	11.3	11.4
Other vessels	211,598	213,450	111,726	110,122	19.9	21.3	30.5	33.1
Total imports								
(fresh and frozen)	304,088	312,814	153,155	148,140	28.5	31.3	41.8	44.5
TOTAL SUPPLIES	1,070,446	996,221	365,457	333,456	100.0	100.0	100.0	100.0

(a) All supplies of fillets and other boneless fish are expressed in terms of landed weight equivalent
• Less than half last digit used or half per cent
•• Nil

Sources: Fishery Departments' and HM Customs and Excise statistics

Table 50. UK: Landings and values of shellfish by British vessels, 1979 and 1980

	Weight		Value	
	1979	1980	1979	1980
	Tonnes	Tonnes	£'000	£'000
England and Wales	34,264	41,065	12,173	12,882
Scotland	28,294	27,563	23,420	19,368
Northern Ireland	1,823	1,349	4,265	1,979
UNITED KINGDOM	64,381	69,977	39,858	34,229

Source: Fishery Departments' statistics

Table 51. UK: Landings and values of white fish by British vessels (by variety), 1979 and 1980

	1979			1980			Percentage change	
	Tonnes	£'000	£/tonne	Tonnes	£'000	£/tonne	Weight	Average value
Demersal								
Cod	109,255	63,568	582	104,307	58,338	559	- 4.5	- 4.0
Haddock	72,759	35,913	494	84,801	34,081	402	+ 16.6	-18.6
Whiting	61,147	19,252	315	56,432	16,498	292	- 7.7	- 7.3
Saithe	18,843	6,008	319	14,762	4,603	312	- 21.7	- 2.2
Plaice	32,067	17,125	534	26,202	12,973	495	- 18.3	- 7.3
Dogfish	14,839	4,281	288	12,535	3,391	270	- 15.5	- 6.2
Norway pout	3,041	88	29	1,804	55	30	- 47.0	+ 3.4
Sandeels	13,392	297	22	33,546	1,013	30	+150.5	+36.4
Other	43,850	25,898	591	49,414	27,416	555	+ 12.7	- 6.1
Total	369,193	172,430	467	383,803	158,368	413	+ 4.0	-11.6
Pelagic								
Sprats	31,676	1,833	58	24,109	1,778	74	- 23.9	+27.6
Mackerel	353,454	36,965	105	253,100	24,073	95	- 28.4	- 9.5
Other	12,934	1,157	89	22,518	1,469	65	+ 74.1	-27.0
Total	398,064	39,955	100	299,727	27,320	91	- 24.7	- 9.0
Shellfish	64,381	39,858	619	69,977	34,229	489	+ 8.7	-21.0
ALL FISH	831,638	252,243	303	753,507	219,917	292	- 9.4	- 3.6

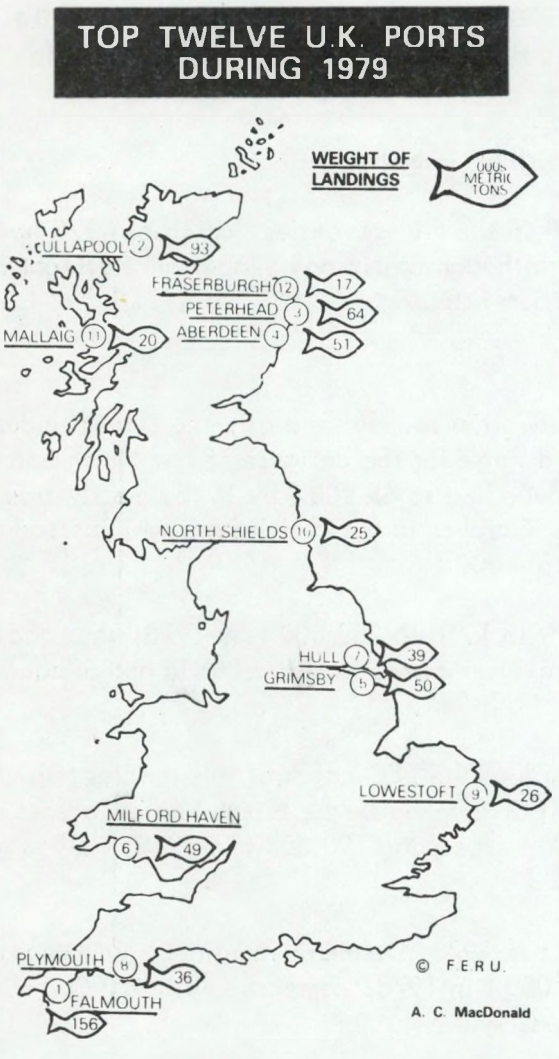
Source: Fishery Departments' statistics

Table 52. UK: Landings of white fish* by British vessels by region of capture, 1979 and 1980

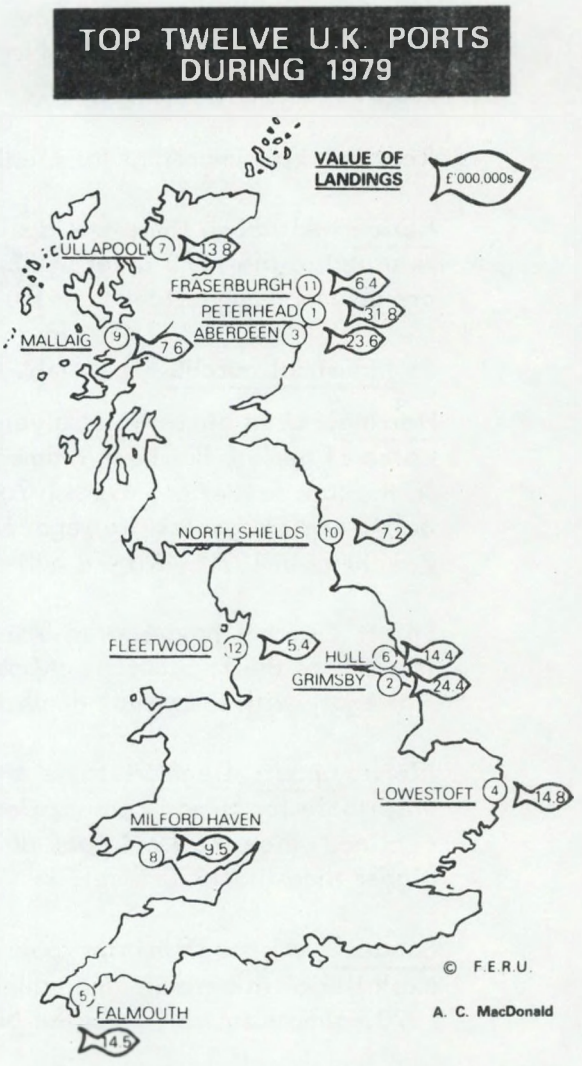
Fishing Regions	1979		1980		Percentage change in catch
	Tonnes	% of total	Tonnes	% of total	
Barents Sea	13,434	1.8	6,516	1.0	- 51.5
Norway Coast	9,827	1.3	6,274	0.9	- 36.2
Bear Island and Spitzbergen	629	0.1	687	0.1	+ 9.2
North West Atlantic	743	0.1	725	0.1	- 2.4
Faroe Islands	4,877	0.6	3,114	0.5	- 36.1
West Coast of Scotland	159,831	20.9	152,651	22.3	- 4.5
North Sea	304,956	39.8	301,716	44.1	- 1.1
Irish Sea	11,974	1.6	15,730	2.3	+ 31.4
English Channel	224,119	29.2	157,851	23.1	- 29.6
Bristol Channel	31,494	4.1	22,471	3.3	- 28.6
Other Grounds	4,474	0.5	15,672	2.3	+250.4
TOTAL	766,358	100.0	683,407	100.0	- 10.8

* Excludes livers

Source: Fishery Departments' statistics



Weight of all British Landings
except Norway Pout and Sandeels



Value of all British Landings
except Norway Pout and Sandeels

3.8 Denmark

Danish fishing effort is concentrated in the North-East Atlantic, and because of the large industrial fishery for reduction to fish meal and oil the species distribution in the national catch in tonnage terms is rather different from that of the other member states.

1) Catches for human consumption:

Cod: North Sea catches have remained more or less constant at around 41 000 t, but there has been a rapid increase in Skagerrak and Kattegat catches of about 25 000 t to 38 000 t. The remainder comes from the Baltic fishery, and total Danish cod catches in 1978 were 133 000 t.

Saithe: Catches fluctuated considerably, but over the 1973-78 period average catches were in the region of 37 000 t, mostly from the North Sea and Skagerrak and Kattegat fisheries.

Whiting: Average catches over the 1973-78 period were just under 100 000 t, with the bulk being taken in the North Sea, although catches here have declined. Much is used in the fish meal industry.

Haddock: Catches declined over the 1970-78 period from 159 000 t to 13 000 t. Traditionally situated in the North Sea, fishing effort has increased slightly in Skagerrak and Kattegat fishery.

Redfish: Not important for the Danish fishing industry.

Plaice: Although there was a slight fall in the mid-seventies, catch by 1978 had returned to the 1970 level of 52 000 t, although Baltic and Skagerrak/Kattegat catches are now more important than the North Sea fishery.

2) Industrial catches

Herring: Used almost exclusively for reduction to meal and oil, the Danish industrial catch of herring has been blamed by and large for the collapse of the North Sea stock in the late seventies. Danish catches dwindled to 67 000 t by 1978, mostly from the Baltic and Skaggerak/Kattegat fishery. Catches in the North Sea, which stood at 231 000 t in 1970, in 1978 had fallen to 4 000 t.

Sprat: Catches have soared from 8 000 t in 1970 to 289 000 t by 1978, thus accounting for 70% of the EEC catch. About one-quarter comes from the Baltic and Skagerrak/Kattegat, with the remainder from the North Sea.

Norway pout: Denmark takes around 95% of the EEC catch of this species (which is unsuitable for human consumption), most of it taken in the North Sea. Catches have declined since the 1974 peak of 475 000 t, reaching 190 000 t in 1978, only slightly higher than the 1970 level.

Sandeel: Although Britain took 35 000 t in 1978, Denmark remains by far the main exploiter of this stock, and caught 670 000 t in 1978, compared with 402 000 t in 1970, almost entirely from the North Sea.

Blue whiting: Denmark first started catching blue whiting for meal in 1977, but by 1978 catches had already risen to 78 000 t, about half of which comes from the North Sea and the rest from the Faroes and the NW Scotland grounds.

Mackerel: Catches declined during the early seventies, but by 1978 had regained their 1970 level of 27 000 t, about two-thirds of this coming from the North Sea.

OECD estimates that in 1978 total Danish catches for reduction were 1.37M tonnes (the level was slightly higher in 1979).

Table 53. Denmark: Total landings by Danish fishermen and foreign landings in Danish ports, 1979 and 1980

	1980*		1979	
	Landings (metric tons)	Value '000 DKr	Landings (metric tons)	Value '000 DKr
1. Danish landings in domestic ports				
Plaice	40 975	232 738	50 126	261 593
Flounder	2 500	5 575	2 694	5 464
Common sole	500	21 120	630	24 188
Cod	159 947	727 759	127 113	488 031
Haddock	13 605	73 194	7 566	37 022
Saithe	9 887	45 184	8 408	35 059
Herring	51 451	166 701	53 645	161 904
Mackerel	18 093	37 814	16 578	25 490
Garpike	700	1 132	862	1 377
Silver eel	700	32 074	887	36 942
Yellow eel	900	26 028	939	24 689
Salmon	840	42 168	744	33 954
Fish for reduction	1 581 387	822 321	1 339 772	574 590
Crustaceans	4 600	93 932	4 732	87 832
Mussels	70 000	10 500	58 306	7 865
Other	20 000	156 200	20 230	143 651
Total 1	1 976 085	2 494 440	1 639 232	1 949 651
2. Danish landings in foreign ports				
Plaice	1 200	25 216	1 365	7 722
Cod	6 500	38 025	5 814	30 936
Salmon	40	1 890	51	2 191
Fish for reduction	5 000	3 300	1 104	666
Other	5 000	41 500	1 741	13 145
Total 2	17 740	109 931	10 075	54 660
Total 1 and 2	1 993 825	2 604 371	1 703 307	2 004 311
3. Foreign landings in Danish ports				
Herring	13 000	42 120	18 395	59 579
Mackerel	20 000	41 800	23 997	38 407
Fish for	53 000	27 560	53 132	24 149
Other	16 000	72 000	18 481	83 187
Total 3	102 000	183 480	114 005	205 322
Total 1 and 3	2 078 085	2 677 920	1 807 237	2 154 973

* Provisional. Source: OECD.

Table 54. Greenland: Landings and values, 1979 and 1980

	1980 a)		1979	
	Quantity tonnes (whole fish)	Value '000 DKr	Quantity tonnes (whole fish)	Value b) '000 DKr
Cod	48 000	96 000	51 583	103 160
Catfish	4 000	4 000	2 363	2 347
Greenland halibut	5 500	10 000	5 269	9 866
Salmon	1 194	18 000	1 297 c)	18 467
Shrimps	25 000	113 000	18 663 d)	86 322
Other	6 000	8 000	5 661	7 502
Total	89 694	249 000	84 836	227 664

(a) Est. (b) Excluding bonus; (c) Excluding 97 tons not sold to fishery enterprises in Greenland; (d) Excluding about 4 000 tons not sold to fishery enterprises in Greenland.
Source: OECD

3.9 Ireland

(only occasional catches in Area 21, otherwise entirely in Area 27).

Cod: There was a 50% increase in catches, with most of the catch from NW Scotland and the Irish sea.

Saithe: Catches increased to around 1 800 t from just over 1 000 t, all caught in waters around the Irish coast.

Whiting: Catches rose from 4 400 t to 7 900 t, again from contiguous fishing grounds.

Haddock: Catches declined to less than 1 000 t from 3 600 t in 1970 and 5 500 t in the early seventies, mostly from the NW Scotland fishing grounds.

Redfish: Not caught by the Irish fleet.

Plaice: Catches remained constant at about 1 700 t, the greater part being taken in the Irish Sea.

Herring: Much investment in the Irish fleet was based on optimistic forecasts for the herring fishery, and the industry has been hard hit by the decline in catches from a peak of 43 000 t in 1970 to 28 000 t in 1978. Catches have fallen by 4 000 t in NW Scotland to 8 000 t and a build-up in catches in the Irish Sea in the mid-seventies has been stifled, with catches there in 1978 reaching only 1 300 t. But catches improved in the west coast fisheries, reaching nearly 12 000 t in 1978, nearly eight times higher than the 1970 catch. Southern coast catches fell to 4 000 t from 25 000 t in 1970. There was in the mid and late seventies some Irish herring effort in the northern North Sea.

Table 55. Ireland: Landings and values 1979 and 1980

	1980		1979	
	Quantity (metric tons) (landed weight)	Value (Irish pounds)	Quantity (metric tons) (landed weight)	Value (Irish pounds)
Total landings (a)	144 283	35 470 965	90 931	27 050 310
Direct human consumption (total)	129 246	34 464 604	80 729	26 514 106
Wetfish (b)	118 489	28 271 095	68 478	18 684 145
Sole	429	1 128 357	305	701 202
Plaice	1 771	929 345	1 630	912 131
Cod	6 563	2 578 593	5 563	2 489 133
Haddock	808	298 654	876	338 179
Whiting	8 832	1 645 229	7 684	1 827 107
Saithe	2 096	729 291	1 579	499 242
Ray/Skate	1 481	551 962	1 337	502 677
Other demersal	3 915	6 135 305	2 122	1 390 071
Herring	36 137	9 403 973	26 650	7 863 422
Mackerel	48 184	4 199 126	17 943	1 755 910
Other pelagic	8 273	671 260	2 789	405 071
Shellfish	10 757	6 193 509	12 251	7 829 961
Crustaceans	3 907	4 458 281	6 186	6 053 061
Molluscs	6 850	1 735 228	6 065	1 776 900
Other purposes	15 037	1 006 361	10 202	536 204
Flatfish	60	11 119	20	583
Whiting	5 053	474 409	637	69 772
Other demersal	388	58 502	206	11 366
Herring	780	29 690	805	27 377
Mackerel	4 787	243 504	8 433	423 849
Sprats	1 077	33 771	101	3 257
Other pelagic	2 892	155 366	-	-

(a) All species including shellfish. (b) All species excluding shellfish.
(Includes quantities of fish landed directly into foreign ports or transhipped at sea for export by Irish Registered Vessels.
Source: OECD.

3.10 Catches in the EEC 200-mile zone

What is apparent from the following brief analysis is that catches from waters approximating to the EEC zone have increased as a proportion of total catch, and yet in terms of cod equivalent tonnage have declined by around 16% for the top six species. If herring and mackerel are included the decline is of the order of 30%.

The understandable attempt by those countries which had suffered third country losses to offset these through increased near-home effort can also be seen reflected in trends for certain species in certain areas, where maximum catch occurred in the mid-seventies before over-fishing had reduced availabilities. And yet, even if considered only in terms of improved efficiency of fishing methods, there has been an increase in fishing effort in near-home waters. The loss of distant water rights has meant in some cases increased catches from previously under-exploited stocks and fishing grounds closer to home, but in the majority of cases it is clear that increased fishing capacity is chasing a smaller availability of fish.

Ineffective enforcement of quotas

As has been mentioned already, the international regulatory bodies for fisheries did not in general prove effective in enforcing quotas or in ensuring implementation of specific conservation measures. The EEC's record in the late seventies was not much better. At the same time there was no agreement on national quotas. Thus, the disproportionate increase in effort in the EEC zone could be seen as being based on a 'first come, first served' outlook. Admittedly, the exclusion of foreign fleets from the EEC zone gave room for some increase in effort, but probably not of the magnitude on which it has occurred.

The following figures show EEC catches of the top species over the period 1970-78 in all areas.

Table 56. Total catches of cod, haddock, saithe, whiting, redfish, plaice and mackerel in ICES and NAFO areas, by EEC member states, in cod equivalent tonnes.

Year		1970	1971	1972	1973	1974	1975	1976	1977	1978	Average
Belgium	t	31 095	39 668	40 154	30 752	28 520	26 915	24 453	28 854	27 800	30 913
	%	2	2	2	2	2	2	2	2	2	2
Denmark	t	450 241	309 415	334 844	307 498	406 264	342 051	466 173	333 999	312 669	362 573
	%	23	17	20	19	24	23	28	23	24	22
France	t	265 293	251 917	223 445	221 611	231 174	209 533	208 431	200 758	194 671	222 981
	%	14	14	13	14	14	14	13	14	15	14
Germany	t	319 253	317 339	264 506	269 289	308 283	249 983	266 328	234 377	174 505	267 096
	%	17	18	16	17	18	17	16	16	13	16
Ireland	t	12 745	15 752	15 614	20 447	18 374	19 311	24 869	26 010	24 665	19 754
	%	1	1	1	1	1	1	2	2	2	1
Netherlands	t	106 842	120 840	125 669	106 904	107 500	102 450	97 618	112 397	112 107	110 259
	%	6	7	7	7	6	7	6	8	9	7
UK	t	748 635	719 589	675 884	642 876	596 987	547 162	552 164	500 520	464 851	605 408
	%	39	41	40	40	35	37	34	35	35	37
Total EEC		1 934 104	1 774 520	1 680 116	1 599 377	1 697 102	1 497 405	1 640 036	1 436 915	1 311 274	1 618 983

Sources: ICES and NAFO (ICNAF) published statistics

The following tables show changes in catches of the main species in waters approximating to the EEC zone. However, distortions are possible for some catches in zone IV, which includes part of the Norwegian zone in its northern section.

Table 57. EEC-9 Catch of top eight species in EEC 200-mile zone 1970 and 1978 (tonnes live weight)

Species \ Zone	III	IV	VIa	VII	VIII	Total
Cod						
1970	74 420	177 999	12 483	14 927	-	279 829
1978	107 619	258 417	13 373	21 393	-	400 802
% change						+ 43%
Saithe						
1970	1 896	136 642	13 221	13 001	-	164 760
1978	8 295	94 241	31 038	4 181	-	137 755
% change						- 16.4%
Whiting						
1970	14 008	116 324	11 222 e)	15 710	1 377	208 641
1978	49 284	103 307	14 677	28 785	1 661	197 714
% change						- 5.2%
Haddock						
1970	869	318 164	34 174	5 904	-	359 111
1978	5 041	88 662	17 162	2 399	-	113 264
% change						- 68.5%
Redfish						
1970	-	21	-	-	-	21
1971	-	2 948	-	-	-	2 948
% change						
Plaice						
1970	19 197	129 714	1 801	9 557	-	160 269
1978	35 339	92 703	1 276	8 026	-	137 344
% change						- 14.3%
Herring						
1970	104 657	287 657	134 450	80 671	-	607 435
1978	70 006	5 440	29 663	31 794	-	136 903
% change						- 77.5%
Mackerel						
1970	2 038	32 864	3 017	45 575	7 306	90 800
1978*	1 378	27 668	68 253	213 395	3 357	314 051
% change						+ 246%
						GRAND TOTAL
6 (Cod, saithe, whiting, haddock, redfish, plaice)						
1970						1 172 631
1978						989 827
6 + herring						
1970						1 780 066
1978						1 126 730
6 + mackerel						
1970						1 263 431
1978						1 303 878
6 + herring and mackerel						
1970						1 870 866
1978						1 440 781

Notes: * 1977; e) estimate.

Based on Eurostat figures.

Table 58. EEC-9 catch of top eight species in EEC zone in cod equivalent, 1970 and 1978 (tonnes)

Species	Cod* equivalent coefficient	1970	1978	% change
Cod	1.0	279 829	400 802	
Saithe	0.77	126 865	106 071	
Whiting	0.86	179 431	170 034	
Haddock	1.0	359 111	113 264	
Redfish	0.87	18	2 565	
Plaice	1.0	160 269	137 344	
Herring	0.8	485 948	109 522	
Mackerel	0.3	27 240	94 215	
Total 8	-	1 618 711	1 133 817	- 30
8 - herring	-	1 132 763	1 024 295	- 9.6
8 - herring - mackerel	-	1 105 523	930 080	- 15.9

Note: * Cod equivalents are based on relative market values. Although inter-relationships obviously vary from country to country, the differences are generally thought to cancel each other out. Nonetheless, there has been criticism of the coefficient for herring, which at 0.8 is thought to be too high, at least for the European context.

Based on Eurostat and ICES figures.

Table 59. Catches of top eight species in ICES Area 21, 1970 and 1978 (tonnes live weight)

Species \ Year	1970	1978
Cod	175 132	34 930
Saithe	-	-
Whiting	-	-
Haddock	-	-
Redfish	4 086	9 053
Plaice	0	5 863
Herring	93 896	0
Mackerel	1 257	64

Based on Eurostat and ICES figures.

Table 60. Catches of top eight species in ICES Area 27, 1970 and 1978 (tonnes live weight)

Species \ Year	1970	1978
Cod	708 457	465 441
Saithe	230 971	175 722
Whiting	211 157	197 851
Haddock	404 038	128 187
Redfish	79 322	52 303
Plaice	165 071	137 706
Herring	609 807	137 218
Mackerel	89 106	505 435

Based on Eurostat and ICES figures.

Table 61. EEC-9 catch in Area 21 and 27, cod equivalent, 1970 and 1978

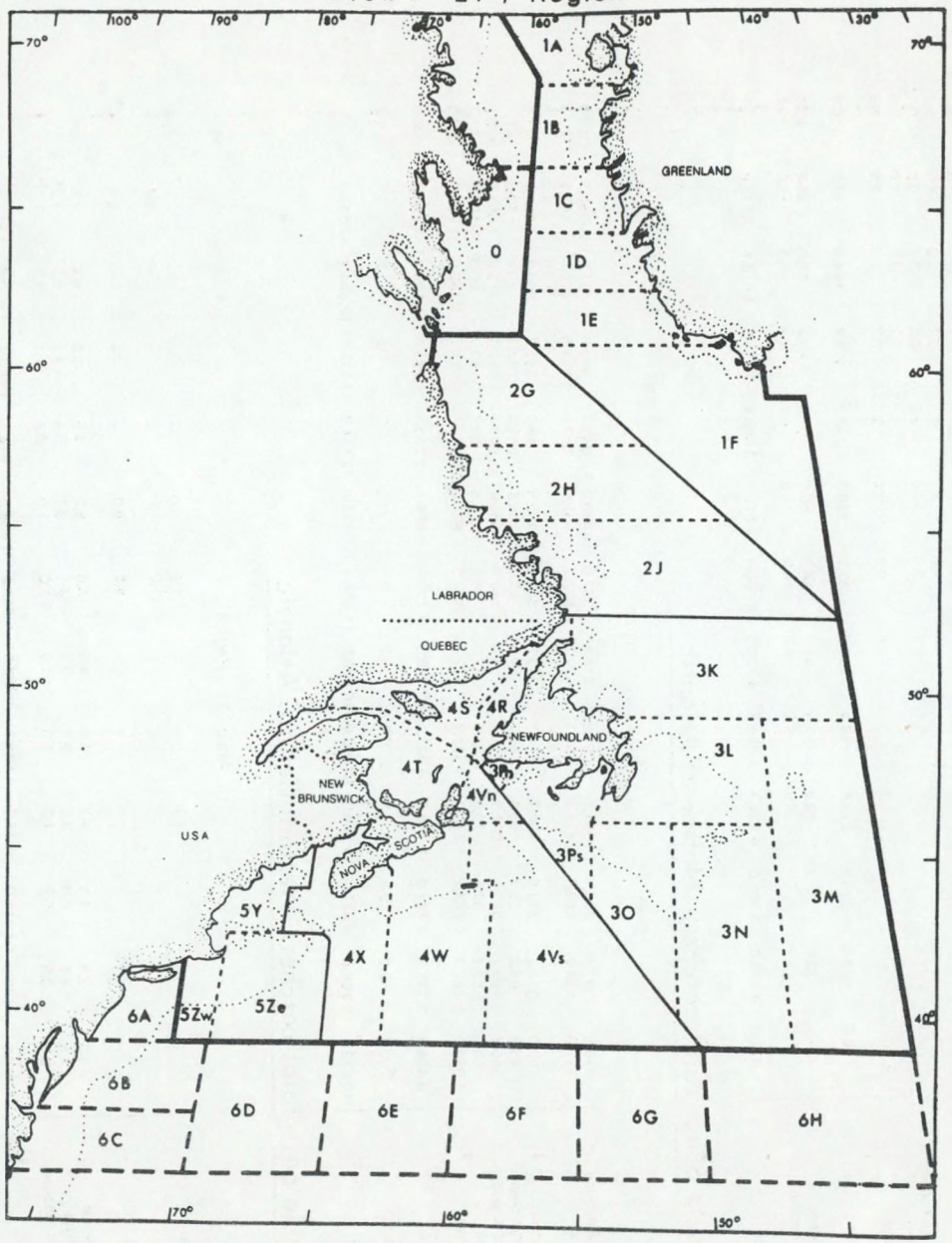
	1970		1978	
	Tonnes	Cod equivalent	Tonnes	Cod equivalent
Cod	883 589	883 589	500 371	500 371
Saithe	230 971	177 848	175 722	135 306
Whiting	211 157	181 595	197 851	170 152
Redfish	83 408	72 564	61 358	53 381
Plaice	165 071	165 071	143 569	143 569
Haddock	404 038	404 038	128 187	128 187
Herring	703 703	562 962	137 218	109 774
Mackerel	90 363	27 109	505 499	151 649
Total	-	2 424 776	-	1 392 389
	1970		1978	
Catches in Area 27 as share of total catch	66%		81.4%	

Based on Eurostat and ICES statistics.

MAJOR FISHING AREAS FOR STATISTICAL PURPOSES

Area 37

Area ; 21 ; Région



Area 27

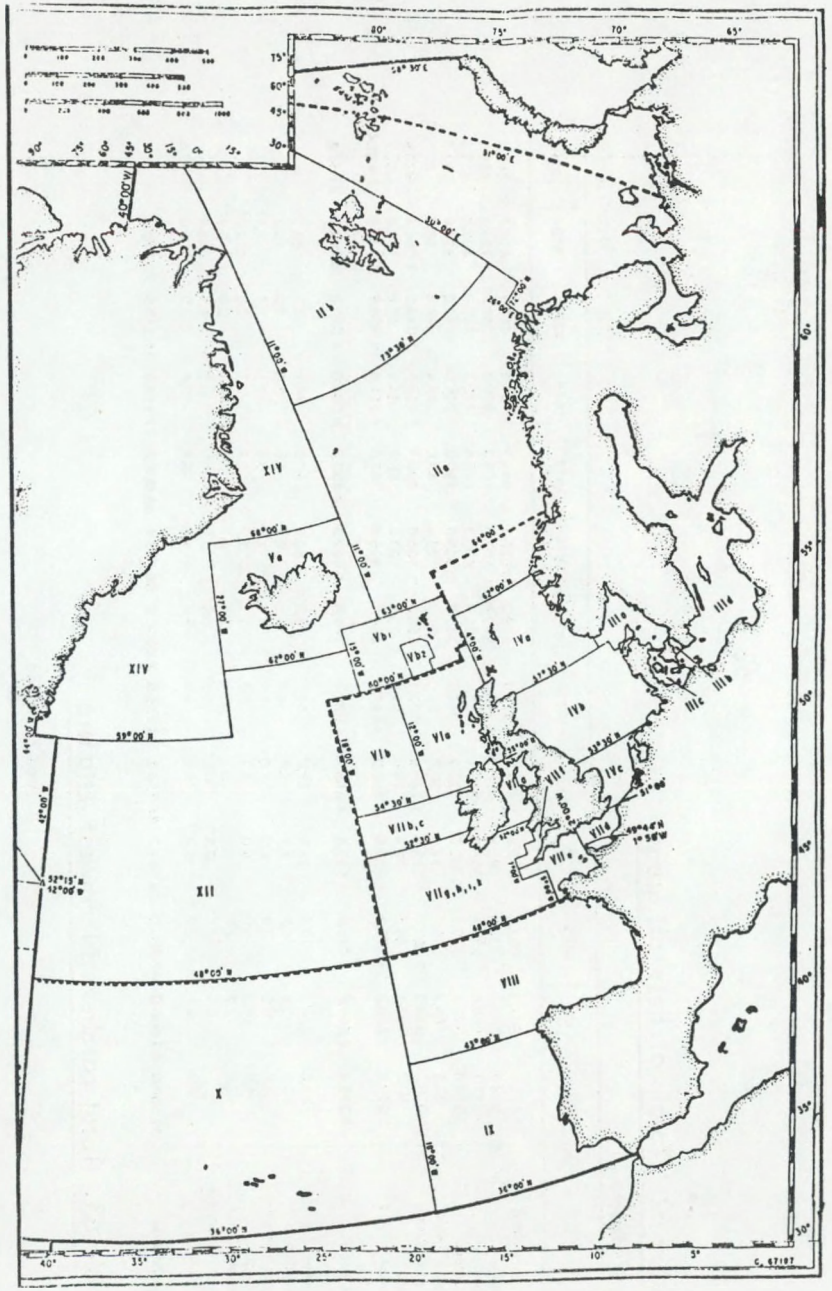


Table 62. Total catches: all areas.

(1 000 t live weight) *(1 000 t poids vif)*

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
BR Deutschland	661,5	682,3	651,6	612,9	507,6	418,7	478,2	525,7	441,7	454,4	432,1	411,9	356,2
France	819,7	803,1	770,5	782,5	757,7	796,7	813,9	807,5	805,8	805,9	760,3	795,6	768,9
Italia	373,1	363,8	370,9	396,8	399,6	425,4	401,4	426,3	405,8	420,3	380,0	402,0	427,2
Nederland	314,5	323,3	323,2	300,8	321,2	348,3	343,8	325,9	350,5	285,0	313,0	324,4	334,7
Belgique/België	63,8	68,2	58,7	53,4	60,2	59,0	52,7	46,4	49,0	44,4	45,4	50,6	47,1
United Kingdom	1 026,2	1 040,2	1 083,0	1 113,8	1 123,9	1 103,1	1 153,8	1 105,6	995,7	1 052,5	1 019,6	1 054,4	927,4
Ireland	50,2	53,1	66,5	78,9	74,0	92,0	90,5	89,5	88,4	94,9	93,5	108,4	92,7
Danmark	1 070,4	1 466,8	1 275,5	1 226,5	1 400,9	1 442,9	1 464,7	1 835,4	1 767,0	1 911,6	1 806,6	1 745,5	1 733,4
EUR 9	**4 379,4**	**4 800,8**	**4 599,9**	**4 565,6**	**4 646,1**	**4 686,1**	**4 798,0**	**5 162,3**	**4 903,9**	**5 069,0**	**4 850,5**	**4 892,8**	**4 692,6**
Grønland	45,0	34,3	39,5	39,8	38,4	41,7	44,5	50,9	47,5	44,7	59,7	68,2	
Guadeloupe	3,5	3,6	4,5	4,5	4,7	4,8	4,8	6,2	4,5	5,0	9,5	9,5*	
Guyane française	0,8	0,8	0,9	1,0	1,0	1,3	1,0	1,0	0,9	1,1	1,1	1,1*	
Martinique	4,8	4,6	4,0	4,0	3,7	3,2	3,1	3,7	3,4	3,7	2,2	2,2*	
Réunion	2,8	2,9	2,6	1,7	2,2	2,2	2,5	2,7	2,2	2,1	0,8	0,8*	
Nouvelle-Calédonie		0,5*	0,5*	0,5*	0,5*	0,5*	0,8*	0,9	1,0	0,9	1,4	1,4*	
St. Pier Miqu	8,3	6,1	7,6	6,8	5,5	4,8	5,5	4,5	6,4	8,4	7,3	9,0	10,5
World/Monde	**60 400,0**	**63 900,0**	**62 700,0**	**68 146,2**	**68 518,1**	**64 239,8**	**65 095,9**	**68 895,4**	**68 608,2**	**72 113,0**	**71 212,9**	**72 379,5**	

Table 63. Total catches: Northwest Atlantic

Area 21 Région

BR Deutschland	217,1	281,2	253,2	205,7	135,4	85,3	94,4	82,7	80,2	57,4	83,7	52,3	75,6
France	148,1	171,3	115,9	66,2	50,8	55,3	36,4	37,1	34,4	37,1	32,0	30,3	23,0
Italia	–	–	–	–	–	–	4,0	4,7	4,4	7,7	15,6	9,1	9,1
United Kingdom	80,7	47,1	5,5	6,7	7,6	16,1	8,4	14,9	2,2	0,5	3,7	0,8	0,7*
Ireland	–	–	–	–	–	–	–	–	6,0	7,2	3,5	1,0	1,0
Danmark	0,1	0,2	0,4	0,4	0,6	0,5	0,5	0,8	1,5	2,7	5,9	3,5	1,4
EUR 9	**446,0**	**499,8**	**375,0**	**279,0**	**194,4**	**157,2**	**143,7**	**140,2**	**128,7**	**112,6**	**144,4**	**97,0**	**110,8**
Grønland	44,1	33,6	38,7	39,2	37,8	41,4	44,3	50,8	47,3	44,2	58,0	66,8	86,5
St. Pier Miqu.	8,3	6,1	7,6	6,8	5,5	4,8	5,5	4,5	6,4	8,4	7,3	9,0	10,5
Total	**4 073,0**	**4 674,0**	**4 486,0**	**4 234,3**	**4 351,9**	**4 322,8**	**4 466,9**	**4 019,1**	**3 806,6**	**3 456,5**	**3 016,5**	**2 814,8**	

Table 63a. Total catches: Northeast Atlantic

Area 27 Région

BR Deutschland	419,5	387,4	388,1	391,6	357,2	314,4	367,0	428,0	342,1	369,5	321,9	313,6	251,9
France	577,3	534,9	564,5	616,6*	608,1	622,2	676,2	658,0	668,0	654,6	615,8	657,7	643,9
Italia	–	–	–	–	–	–	–	–	–	–	0,4	4,4	1,3
Nederland	299,0	313,2	314,6	298,7	318,1	345,8	340,8	322,5	346,1	281,8	309,7	322,6	321,4
Belgique/België	63,8	68,2	58,7	53,4	60,2	59,0	52,7	46,4	49,0	44,4	45,4	50,6	47,1
United Kingdom	945,4	993,1	1 077,5	1 092,3	1 116,3	1 084,6	1 142,8	1 088,4	993,4	1 052,1	1 015,9	1 053,5	926,7
Ireland	50,2	53,1	66,5	78,9	74,0	92,0	90,5	89,5	82,4	87,7	90,0	107,5	91,7
Danmark	1 053,2	1 447,3	1 263,1	1 216,7	1 387,4	1 427,3	1 450,0	1 821,3	1 749,1	1 893,7	1 786,0	1 726,0	1 720,0
EUR 9	**3 408,4**	**3 797,2**	**3 733,0**	**3 748,2**	**3 921,3**	**3 945,3**	**4 120,0**	**4 454,1**	**4 230,1**	**4 383,8**	**4 185,1**	**4 235,9**	**4 004,0**
Grønland	0,8	0,6	0,6	0,5	0,6	0,3	0,2	0,1	0,2	0,5	1,9	1,4	2,3
Total	**10 272,0**	**10 208,0**	**9 921,0**	**10 698,0**	**10 503,0**	**10 695,5**	**11 284,9**	**11 833,7**	**12 134,3**	**13 277,8**	**12 684,2**	**12 035,3**	

Table 64. Total catches: Western Central Atlantic

Area 31 Région

France	–	–	–	–	–	–	1,2	0,0	–	–	–	–	–
Italia	–	–	–	–	–	–	1,0	–	–	–	–	0,4	–
EUR 9	–	–	–	–	–	–	**2,2**	**0,0**	–	–	–	**0,4**	–
Guadeloupe	3,5	3,6	4,5	4,5	4,7	4,8	4,8	6,2	4,5	5,0	9,5	9,5*	
Martinique	4,8	4,6	4,0	4,0	3,7	3,2	3,1	3,7	3,4	3,7	2,2	2,2*	
Guyane française	0,8	0,8	0,9	1,0	1,0	1,3	1,0	1,0	0,9	1,1	1,1	1,1*	
Total	**1 287,0**	**1 365,0**	**1 413,0**	**1 419,3**	**1 628,7**	**1 486,0**	**1 392,3**	**1 538,7**	**1 548,1**	**1 572,2**	**1 420,6**	**1 852,9**	

Table 64a. Total catches: Eastern Central Atlantic

(1 000 t live weight) *(1 000 t poids vif)*

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
						Area **34** Région							
France	43,6	57,8	47,4	54,1	47,7	59,3	49,3	54,2	56,0	64,1	67,2	65,3	57,3
Italia	69,4	62,8	62,2	62,9	61,3	59,7	44,3	32,9	19,0	25,0	26,2	20,2	28,3
EUR 9	**113,0**	**120,6**	**109,6**	**117,0**	**109,0**	**119,0**	**93,6**	**87,1**	**75,0**	**89,1**	**93,4**	**85,5**	**85,6**
Total	**1 545,0**	**1 684,0**	**2 768,2**	**2 969,0**	**2 948,3**	**3 177,9**	**3 388,2**	**3 548,5**	**3 555,8**	**3 656,2**	**3 749,1**	**3 045,7**	

Table 65. Total catches: Mediterranean and Black Sea

						Area **37** Région							
France	50,7	39,1	42,7	45,6	49,9	59,9	49,6	44,6	46,8	50,1	44,0	40,5	43,9
Italia	284,3	281,0	288,0	320,3	321,1	348,7	334,2	364,1	352,0	354,5	308,3	336,9	351,3
EUR 9	**335,0**	**320,1**	**330,7**	**365,9**	**371,0**	**408,6**	**383,8**	**408,7**	**398,8**	**404,6**	**352,3**	**377,4**	**395,2**
Total	**1 124,0**	**1 028,0**	**943,0**	**1 153,3**	**1 113,7**	**1 164,3**	**1 155,6**	**1 372,2**	**1 296,2**	**1 312,6**	**1 147,2**	**1 239,0**	

Table 66. Total catches: Southwest Atlantic

						Area **41** Région							
BR Deutschland	2,0	–	–	–	–	4,0	–	–	–	–	–	13,6	6,6
EUR 9	**2,0**	–	–	–	–	**4,0**	–	–	–	–	–	**13,6**	**6,6**
Total	**1 261,0**	**815,0**	**701,0**	**1 100,1**	**764,3**	**800,8**	**949,8**	**893,1**	**857,6**	**843,2**	**1 061,2**	**1 394,4**	

Table 66a. Total catches: Southeast Atlantic

						Area **47** Région							
BR Deutschland	–	3,7	0,3	0,6	–	–	1,8	–	–	12,6	11,5	17,5	7,2
France	–	–	–	–	–	–	1,2	13,5	0,5	–	1,2	1,8	0,8
Italia	–	–	–	–	–	–	0,5	6,9	11,3	11,8	6,6	5,4	2,0
Belgique/Belgie	0,3	0,1	0,3	–	–	–	–	–	–	–	–	–	–
EUR 9	**0,3**	**3,7**	**0,6**	**0,6**	–	–	**3,5**	**20,4**	**11,8**	**24,4**	**19,3**	**24,7**	**10,0**
Total	**2 637,0**	**3 289,0**	**3 055,0**	**2 517,1**	**2 456,8**	**3 007,7**	**3 164,4**	**2 851,9**	**2 567,2**	**2 768,4**	**2 773,2**	**3 292,4**	

Table 67. Total catches: Southeast Pacific

						Area **87** Région							
BR Deutschland	–	–	–	–	–	–	–	–	4,4	–	–	–	–
France	–	–	–	–	1,2	–	–	–	–	–	–	–	–
EUR 9	–	–	–	–	**1,2**	–	–	–	**4,4**	–	–	–	–
Total	**11 182,0**	**11 888,0**	**10 285,0**	**13 760,1**	**12 040,0**	**5 588,6**	**3 074,6**	**5 332,0**	**4 410,6**	**5 809,7**	**3 966,5**	**5 246,3**	

Table 68. Total catches: Western Indian Ocean

						Area **51** Région							
Italia	–	–	–	–	–	–	–	–	–	–	–	0,8	7,0
EUR 9	–	–	–	–	–	–	–	–	–	–	–	**0,8**	**7,0**
Réunion	2,8	2,9	2,6	1,7	2,2	2,2	2,5	2,7	2,2	2,1	0,8	0,8	
Total	**1 363,0**	**1 448,0**	**1 453,0**	**1 724,1**	**2 036,5**	**1 693,9**	**1 960,0**	**2 114,2**	**2 105,5**	**2 070,0**	**2 312,1**	**2 316,4**	

Table 69. Total catches: Inland waters

(1 000 t live weight) *(1 000 t poids vif)*

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
BR Deutschland	10,0*	10,0*	10,0*	15,0*	15,0*	15,0*	15,0*	15,0*	15,0*	15,0*	15,0*	15,0	15,0
France	:	:	:	:	:	:	:	:	:	:	:	:	:
Italia	19,4	20,0	20,7	17,5	17,2	17,0	17,4	17,8	19,1	21,3	22,9	24,6	28,2
Nederland	15,5	10,1	8,6	2,0	3,1	2,5	3,0	3,4	4,4	3,2	3,3	1,9	2,3
Belgique/België	:	:	:	:	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Luxembourg	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
United Kingdom	:	:	:	:	0,0	2,4	2,6	2,2	:	:	:	:	:
Ireland	:	:	:	:	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Danmark	17,1	19,3	12,0	9,4	12,9	15,1	14,2	13,3	16,4	15,2	14,7	16,0	17,0
EUR 9	:	:	:	:	:	:	:	:	:	:	:	:	:
Grønland	0,1	0,1	0,2	0,1	0,1	0,0	0,0	0,0	0,0	0,0	0,0	0,0	
Guadeloupe	–	–	–	–	–	0,0	0,0	0,0	0,0	0,0	0,0	0,0	
Martinique	–	–	–	–	–	0,0	0,0	0,0	0,0	0,0	0,0	0,0	
Guyane française	:	:	:	:	:	0,0	0,0	0,0	0,0	0,0	0,0	0,0	
Réunion	–	–	–	–	–	0,0	0,0	0,0	0,0	0,0	0,0	0,0	
St. Pier. Miqu.	–	–	–	–	–	0,0	0,0	0,0	0,0	0,0	0,0	0,0	

Table 70. EEC-9: Catches of species groups by region - Total marine fish

(1 000 t live weight) *(1 000 t poids vif)*

Code	Area/Région	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
21	Atlantic NW	445,9	499,8	374,7	278,6	186,7	131,1	125,4	111,9	112,1	81,4	113,6	83,9	
27	Atlantic NE	3 018,3	3 375,2	3 308,9	3,323,8	3 468,0	3 418,5	3 566,8	3 890,2	3 646,4	3 819,0	3 612,2	3 620,9	
31	Atlantic WC	–	–	–	–	–	–	2,2	0,0	–	–	–	0,3	
34	Atlantic EC	101,7	112,4	99,5	110,2	101,3	113,3	88,3	82,1	72,7	72,6	84,3	80,0	
41	Atlantic SW	2,0	–	–	–	–	4,0	–	–	–	–	–	12,2	
47	Atlantic SE	13,2	3,8	1,0	0,6	–	–	3,0	19,9	11,4	24,4	17,4	24,3	
37	Mediterranean + Black Sea	249,5	238,8	249,5	298,9	283,7	316,4	302,1	315,9	284,6	300,8	275,7	130,6	
87	Pacific SE	–	–	–	–	1,2	–	–	–	4,4	–	–	–	
	Total	**3 830,6**	**4 230,0**	**4 033,6**	**4 012,1**	**4 040,9**	**3 983,3**	**4 087,8**	**4 420,0**	**4 131,6**	**4 298,2**	**4 103,2**	**3 952,2**	

Table 71. EEC-9: Catches of species groups by region - Flounder, halibut, sole etc.

21	Atlantic NW	1,5	0,6	0,3	0,0	0,1	0,4	2,3	2,4	2,0	3,1	4,5	12,9
27	Atlantic NE	239,8	241,2	239,1	234,5	232,6	235,9	238,5	220,7	218,3	225,3	240,3	212,5
31	Atlantic WC	–	–	–	–	–	–	–	–	–	–	–	–
34	Atlantic EC	–	–	–	–	–	–	–	–	–	0,1	1,7	0,9
41	Atlantic SW	–	–	–	–	–	–	–	–	–	–	–	–
47	Atlantic SE	0,3	0,1	0,3	–	–	–	–	–	–	–	–	–
37	Mediterranean + Black Sea	4,0	4,2	3,8	4,7	4,1	4,6	4,1	4,6	4,3	4,9	5,4	1,5
87	Pacific SE	–	–	–	–	–	–	–	–	–	–	–	–
	Total	**245,6**	**246,1**	**243,5**	**239,2**	**236,8**	**240,9**	**244,9**	**227,7**	**224,6**	**233,4**	**251,9**	**227,8**

Table 72. EEC-9: Catches of species groups by region - Cod, hake, haddock etc.

21	Atlantic NW	397,6	404,9	274,0	178,4	123,7	92,6	76,1	68,3	70,6	53,5	50,8	41,6
27	Atlantic NE	1 409,4	1 796,0	1 809,2	1 859,5	1 722,0	1 736,4	1 686,4	2 027,9	1 638,8	1 809,1	1 494,8	1 347,7
31	Atlantic WC	–	–	–	–	–	–	–	–	–	–	–	0,0
34	Atlantic EC	–	–	–	–	–	–	–	–	–	–	–	–
41	Atlantic SW	2,0	–	–	–	–	3,9	–	–	–	–	–	12,0
47	Atlantic SE	11,1	3,0	0,3	0,4	–	–	1,4	6,7	11,3	23,4	12,7	16,9
37	Mediterranean + Black Sea	12,3	11,9	11,8	13,2	15,0	16,7	15,4	18,6	20,6	22,9	23,8	0,9
87	Pacific SE	–	–	–	–	–	–	–	–	3,4	–	–	–
	Total	**1 832,4**	**2 215,8**	**2 095,3**	**2 051,5**	**1 860,7**	**1 849,6**	**1 779,3**	**2 121,5**	**1 744,7**	**1 908,9**	**1 582,1**	**1 419,1**

Table 73. EEC-9: Catches of species groups by region - Redfish, bass, conger etc.

(1 000 t live weight) *(1 000 t poids vif)*

Code	Area/Région	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
21	Atlantic NW	15,2	10,0	4,6	4,5	2,9	4,7	8,4	8,4	6,7	8,1	40,7	16,9	
27	Atlantic NE	374,3	352,2	264,8	144,9	525,9	451,4	400,0	555,7	494,2	570,9	826,5	805,4	
31	Atlantic WC	–	–	–	–	–	–	–	–	–	–	–	–	
34	Atlantic EC	–	–	–	–	–	0,1	–	–	–	–	4,6	2,0	
41	Atlantic SW	–	–	–	–	–	–	–	–	–	–	–	0,1	
47	Atlantic SE	1,8	0,4	0,0	0,1	–	–	0,1	–	–	0,2	0,2	0,1	
37	Mediterranean + Black Sea	37,4	34,7	36,6	40,5	51,5	53,4	52,6	58,3	52,9	57,6	52,0	28,3	
87	Pacific SE	–	–	–	–	–	–	–	–	0,1	–	–	–	
	Total	**428,7**	**397,3**	**306,0**	**190,0**	**580,3**	**509,6**	**461,1**	**622,4**	**553,9**	**636,8**	**924,0**	**852,8**	

Table 74. EEC-9: Catches of species groups by region - Jack, mullet, sauries etc.

21	Atlantic NW	–	–	–	–	–	–	–	–	0,6	0,7	0,4	–	
27	Atlantic NE	5,0	5,8	6,4	7,1	6,9	7,3	14,3	11,8	9,7	13,6	18,3	38,3	
31	Atlantic WC	–	–	–	–	–	–	–	–	–	–	–	–	
34	Atlantic EC	–	–	–	–	–	–	–	–	–	–	–	–	
41	Atlantic SW	–	–	–	–	–	–	–	–	–	–	–	–	
47	Atlantic SE	–	–	–	–	–	–	–	–	–	–	–	–	
37	Mediterranean + Black Sea	19,0	19,3	18,8	21,9	22,9	22,7	23,7	22,9	22,1	21,5	21,2	3,9	
87	Pacific SE	–	–	–	–	–	–	–	–	–	–	–	–	
	Total	**24,0**	**25,1**	**25,2**	**29,8**	**29,8**	**30,0**	**38,0**	**34,7**	**32,4**	**36,0**	**43,4**	**49,1**	

Table 75. EEC-9: Catches of species groups by region - Herring, sardines, anchovies etc.

21	Atlantic NW	28,2	81,2	95,6	94,3	56,5	31,8	36,6	31,1	29,2	11,2	–	–	
27	Atlantic NE	714,6	744,6	713,4	716,3	753,7	785,3	995,1	841,0	999,7	800,0	600,7	567,8	
31	Atlantic WC	–	–	–	–	–	–	–	–	–	–	–	–	
34	Atlantic EC	11,6	8,3	10,4	11,6	11,3	10,0	5,0	4,5	5,4	0,9	0,7	–	
41	Atlantic SW	–	–	–	–	–	–	–	–	–	–	–	–	
47	Atlantic SE	–	–	–	–	–	–	–	–	–	–	0,0	–	
37	Mediterranean + Black Sea	93,2	91,2	100,6	147,3	115,1	120,9	120,8	138,4	114,3	107,8	98,5	0,0	
87	Pacific SE	–	–	–	–	–	–	–	–	–	–	–	–	
	Total	**847,6**	**925,3**	**920,0**	**969,5**	**936,6**	**948,0**	**1 157,5**	**1 015,0**	**1 148,6**	**919,9**	**699,9**	**567,8**	

Table 76. EEC-9: Catches of species groups by region - Tuna, bonito, billfish etc.

21	Atlantic NW	–	–	–	–	–	–	–	–	0,0	0,0	–	–	
27	Atlantic NE	17,6	15,8	11,3	7,5	10,6	10,7	8,0	9,6	7,0	7,0	7,4	8,3	
31	Atlantic WC	–	–	–	–	–	–	2,2	0,0	–	–	–	–	
34	Atlantic EC	31,2	49,6	39,0	42,0	37,5	53,7	45,0	49,3	50,4	62,6	65,8	64,6	
41	Atlantic SW	–	–	–	–	–	–	–	–	–	–	–	–	
47	Atlantic SE	–	–	–	–	–	–	1,2	13,2	0,1	0,1	0,1	–	
37	Mediterranean + Black Sea	11,1	7,5	8,4	8,5	11,1	11,3	7,6	8,9	10,3	12,8	12,1	11,7	
87	Pacific SE	–	–	–	–	1,2	–	–	–	–	–	–	–	
	Total	**59,9**	**72,9**	**58,7**	**58,0**	**60,4**	**75,7**	**64,0**	**81,0**	**67,8**	**82,5**	**85,4**	**84,6**	

Table 77. EEC-9: Catches of species groups by region - Mackerel, snoek, cutlassfish etc.

21	Atlantic NW	0,1	0,1	0,1	1,3	2,8	0,8	1,9	0,3	0,3	1,8	0,9	–	
27	Atlantic NE	89,1	66,3	70,3	88,2	78,7	68,5	89,7	94,1	116,5	183,8	314,4	505,4	
31	Atlantic WC	–	–	–	–	–	–	–	–	–	–	–	–	
34	Atlantic EC	–	–	–	–	–	–	–	–	–	–	0,3	0,0	
41	Atlantic SW	–	–	–	–	–	–	–	–	–	–	–	–	
47	Atlantic SE	–	–	–	–	–	–	–	–	–	–	0,3	–	
37	Mediterranean + Black Sea	13,8	17,0	15,8	14,0	7,9	6,0	6,6	6,0	5,1	4,6	4,1	4,1	
87	Pacific SE	–	–	–	–	–	–	–	–	–	–	–	–	
	Total	**103,0**	**83,4**	**86,2**	**103,5**	**89,4**	**75,3**	**98,2**	**101,4**	**122,9**	**190,2**	**320,0**	**509,5**	

Table 77a. EEC-9: Catches of species groups by region - Shark, ray, chimaera etc.

(1 000 t live weight) *(1 000 t poids vif)*

Code	Area/Région	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
21	Atlantic NW	0,3	0,0	–	–	–	0,0	0,1	0,3	0,7	0,4	0,7	0,4	
27	Atlantic NE	66,7	62,1	72,4	59,2	42,2	43,0	45,5	43,1	41,6	44,9	39,7	52,7	
31	Atlantic WC	–	–	–	–	–	–	–	–	–	–	–	–	
34	Atlantic EC	–	–	–	–	–	–	–	–	–	–	0,2	0,2	
41	Atlantic SW	–	–	–	–	–	–	–	–	–	–	–	–	
47	Atlantic SE	–	–	–	–	–	–	–	–	–	–	0,0	0,0	
37	Mediterranean + Black Sea	5,5	5,5	5,3	3,2	5,8	6,2	5,3	5,7	5,3	6,1	5,7	5,1	
87	Pacific SE	–	–	–	–	–	–	–	–	–	–	–	–	
	Total	**72,5**	**67,6**	**77,7**	**62,4**	**48,0**	**49,2**	**50,9**	**49,1**	**47,6**	**56,4**	**46,3**	**58,4**	

4. DEVELOPMENT OF EMPLOYMENT IN THE COMMUNITY'S FISHING INDUSTRY

4.1 The European Community

In 1970 there were in the EEC (Nine) 154 640 people employed as fishermen but by 1979 numbers had fallen to 122 800, of which around 14 500 were only employed part-time in fishing. (Greece has around 31 500 full-time and 14 000 part-time fishermen). This 20% cut in employment is to some extent explained by the 13% reduction in gross tonnage of the EEC fleet over the same period, although not by any change in the number of vessels - after a brief increase in the mid and late 70s numbers by 1979 had fallen to slightly below their 1970 level.

Many on-shore jobs created

Rising costs, increasingly scarce stocks and reduced competitiveness of fish vis-a-vis other protein foods have all also encouraged technical innovation, with a resulting decline in dependence on manpower. Hence actual catches increased over the 1970-78 period by around 7.2% live weight. But the importance of the employment aspect goes far beyond actual figures; in many areas the industry represents the main source of livelihood, whether directly or through spin-off industries such as quayside, processing, transport, vessel maintenance and equipment. Depending upon the nature of the fishery and its location vis-a-vis processing and marketing facilities and the main consumer concentrations, one job on board a fishing vessel can generate as many as four or five on land (the proportionis particularly high in Ireland).

Moreover, the economic and subsequent social value of the fishing industry tends to become greater the more remote the community is from other major conurbations and industrial centres, since the possibilities of developing alternative industries decrease. In many areas the fishing industry is the only main sector where development can be considered, helping thus to maintain employment, support rural communities and keep down the social cost of rural depopulation. Apart from these socio-economic factors, it is also worth noting that apart from the interest of the fishing industry itself it is valuable to sustain such rural communities since they are often best located to exploit local stocks, and this is of increasing importance as fuel costs represent an increasing share of total operating costs.

4.2 Employment development - Germany

Total employment in the German fishing fleet at the end of 1980 was 4 884. This corresponds to a drop of 27% since 1970 when numbers were in the region of 6 670. The main cause for the fall in employment has been the disappearance of the large distant water vessels. In September 1979 employment in the cutter and inshore fleets reached 1 909 and in the rest of the fleet 2 487 (although this figure includes vessels that were laid up or chartered for research or fisheries protection).

In the cutter and inshore fleet the age structure is relatively old, with 50% of the fishermen being over 40 years old and 27% over 50 years. Recruitment among the younger age groups is low, with only 26% under 30 years, although the percentage of fishermen in this age group has hardly changed since 1975. Of owner-operators in this sector more than 25% are over 50 years of age. The situation in the larger vessel

category is somewhat different, with only 35% over 40 years, although again only 25% of those employed in this sector are under 30 years old. The tendency here, too, is towards an older age structure, since in 1975 only 25% of the fishermen were over 40 years old and 32% were under 30 years old.

As far as the processing sector is concerned, in 1979 11 132 persons were employed in those concerns with over 20 employees. There has been some growth in employment in this sector in recent years - in 1975 only 10 726 persons were employed. This reflects consumer trends towards processed produts, although on the other hand it is likely that employment has declined in primary processing as the processing industry becomes increasingly dependent on imports.

4.3 Employment development - France

There has been a considerable decline in employment in the fishing industry at sea in France over the past ten years, with numbers declining by a third from 35 799 in 1970 to 24 105 in 1980. This decline was not, however, spread evenly, with over half of the drop in numbers taking place in the last three years of that period.

The greater part of French fishermen are employed in the artisanale sector, with only 4 083 working in the so-called "industrial" sector (distant water, fresher trawler and tuna fleets) at the end of 1979. These are true employees, while in the artisanale sector most are share-fishermen. The fresher trawler fleet accounts for just over 2 800 jobs, the tuna fleet 500 and the distant water fleet 770.

As for age structure, 20% of fishermen in the industrial sector are in the 20-29 year bracket, 32.7% in the 30-39 year bracket and 39.1% 40 and over. In addition to those men employed at sea either in the industrial or artisanale sectors around 11 000 are involved in aquaculture of one kind or another.

It has been estimated that employment dependent on fisheries runs to about 100 000 jobs, including processing, quayside, vessel maintenance, vessel and gear construction, distribution, wholesale and retail trades, etc. In Boulogne, for instance, it is reckoned that 4 000 people are employed in processing, and Concarneau has around 8 000 independent sectors (although employment spin-off in these ports is probably higher than the national average).

4.4 Employment development - Netherlands

The number of commercial fishermen in the Netherlands by the end of 1979 had fallen to 3 421 compared with 5 514 at the start of the 1970s, although the 1979 figure includes 800 employed outside the middlewater (grote zeevisserij), inshore, coastal and shrimp fleets (e.g. freshwater fishermen). For the fleet as a whole the reduction has been fairly steady, although it did speed up in the latter half of the decade.

In the three main sectors - middle water, coastal and inshore, shrimp - employment has fallen by around 900 since the early 1970s to 2 669 in 1980. Changes have differed according to sector, with the middle water fleet losing most on percentage terms (employment being cut from 864 in 1972 to 393 in 1980). But in sheer numbers the inshore and coastal fleet accounted for the greater part of the loss, with the number

of employed fishermen falling back from 2 625 in 1972 to 2 286 in 1980. Just as the number of vessels in the shrimping fleet has scarcely changed over the last ten years, neither has employment, which has remained more or less constant at around 380 fishermen.

In 1979 the EEC Commission put 1976 employment in the Dutch processing sector at 1 193 persons (only for companies of at least 20 employees). Total employment in fisheries and related industries is put at 14 000 by the Dutch Agriculture Ministry.

Table 78. Estimated employment in and through Dutch fisheries, 1977

Fishing	3 500
Wholesale	500
Retail	6 000
Processing	4 000
Total	14 000

Source: Dutch Ministry of Agriculture.

4.5 Employment development - Belgium

During the 1970s employment on vessels in the Belgian fishing industry fell back by about 24% from 1 643 in 1970 to 1 255 in 1979, of which 356 were apprentices. The 70 - 180 GRT range accounts for over a half of employment on vessels. It is also worth noting that 31% of the vessels in the Belgian fleet are owned by a crew-member, generally the skipper, with the proportion being especially high among the smaller vessel categories (in fact 90% of fishing companies in Belgium own only one vessel). Zeebrugge accounts for just over half of employment on board, Ostend 31% and Nieuwpoort 15%. As far as age structure is concerned, the average for all categories is 31 years, but slightly higher for skippers at 37 years.

Although no precise figures are available on employment in the secondary sector, some estimates put the number as high as 4 000 - 5 000; this includes porters, auction employees, administrative personnel, wholesalers and merchants, retailers and staff, processing, training, etc. Employment in some of these areas is also subject to fluctuation, given seasonal variations in catches and demand.

There are no precise figures on employment in the tertiary sector either, which includes shipyards, fishing gear manufacturers, maintenance workers, transport, port employees etc. Here also there is considerable fluctuation and overlap with other areas of the economy. In the processing sector proper, employment seems to have diminished from 1 031 persons in 1970 to 856 in 1977, although here again fluctuations occur frequently. However, the general trend has been downward as the number of concerns has contracted. Moreover, the statistics available apply only to concerns with over five regular full-time employees.

4.6 Employment development - United Kingdom

The total number of fishermen in the UK increased moderately over the 1970-80 period from 21 651 to 23 289, although in the intermediate period the level had been somewhat lower in certain years. However, the figures for the earlier years at least should be treated with some caution. Of this total around 25% are only employed part-time in fishing, and this proportion has been static for some years. Of those fishermen in full-time employment (16 716 in 1980) about 50% are in England, 45% in Scotland and the remainder in Northern Ireland. Employment in Scotland has remained more or less static over the past five years, but has declined in England and Wales (although there has been an upturn in the last two years). The main centres of fishing employment are Grimsby, Hull, Peterhead, Fraserburgh, Lowestoft, Aberdeen and Fleetwood, although there have been reductions in recent years at Hull, Aberdeen and Fleetwood with the decline of the distant water fleet.

Age structure of the fishing population shows that approximately 25% of all fishermen are accounted for in each of the 21-30 and 31-40 year age groups, with the proportion slightly lower in the larger vessel ranges (over 24m). Only in the under 16m vessels is there a considerable number of men (17%) employed over the age of 50.

No recent or precise figures are available on total numbers employed in ancillary industries, but the White Fish Authority reckoned that in 1975 at the main ports of Grimsby, Hull, Aberdeen, Peterhead and Fraserburgh employment in the ancillary industries reached 26 000 persons, compared with just over 6 000 full-time fishermen. However, to claim that the employment multiplier effect for the whole of the United Kingdom were in the region of 4.3 would be misleading, since spin-off from part-time fishermen is not included, processing and similar industries are less apparent at many other ports and there have in any case been drastic changes in the overall employment situation in the UK, which is also bound to have had an effect. In 1979 the EEC Commission estimated 1976 employment in processing in the UK at 11 140 persons (in companies with 20 or more employees). But frozen food industry representatives reckoned in 1980 that 18 000 people were employed in frozen fish manufacture (House of Lords report on EEC fisheries policy).

4.7 Employment development - Denmark

Up-to-date statistics on the Danish fleet and fishermen are not available, but during the 1970-77 period the number of fishermen declined by 3.6% to 14 909, approximately in line with the 3.1% reduction in the number of fishing vessels over the same period. There were in 1977 approximately 10 900 full-time fishermen and 3 900 part-time fishermen. According to the EEC Commission, employment in processing in 1976 accounted for 2 597 jobs, in concerns with over 20 employees.

4.8 Employment in fisheries - Ireland

The Irish fishing industry has over the past ten years had a rather untypical development in employment when compared with trends in the rest of the EEC. Employment on vessels, thanks to the Fisheries Development Programme, has risen from 5 681 in 1970 to 8 824 in 1980, an increase of 55% similar to the increase in fleet gross tonnage of 55%. However, there remains a large number of part-time fishermen (just over

5 300 in 1980), which means that the country has a higher share of part-time fishermen than any other northern EEC member state (although comparable figures are not available for France). Since the early 1970s the increase in employed numbers has been faster for those employed full-time than for those working only part-time. This reflects the growing numbers of larger, more sophisticated vessels in the Irish fleet and also the training schemes which have been introduced by the authorities.

There has also been considerable growth in onshore employment, which has risen from 1 350 persons in 1970 to 2 520 in 1979, about two-thirds of these being employed in processing and the remainder in related areas (excluding transport). This corresponds to a sixfold increase in investment in processing over the 1970-79 period.

5. FUEL PRICE DEVELOPMENT

The escalation of fuel prices over the past eight years has only added to the problems faced by the fishing industry after the introduction of 200-mile zones in the mid-seventies. While there might be a case for arguing that the subsequent rise in total costs has advanced the restructuring of the fleet through forcing the least efficient vessels out of business, what is more likely is that profit margins have been cut back so far that investment in most countries has been discouraged or bolstered only with government support. Hence, innovative investment geared towards restructuring has been lacking.

Difficult to compare prices

Any comparison of fuel prices over a period and between the various member states is rather hard to evaluate because of fluctuations in currency values but the general trend can nonetheless be observed. According to the EEC Commission, fuel costs represent between 25% and 30% of total costs for most types of fishing, although the precise level depends on the type of fishing being carried out, the size of vessel and engine, depth of water, weather conditions, distance of fishing grounds from port, and on the country from which the vessel operates.

Generally speaking, it can be said that high seas trawling is the most fuel-intensive type of operation. One French estimate reckons that this type of fishing takes 1.0 kg of fuel for 1.0 kg of fish; for coastal trawling the estimate is 0.6 kg fuel, long-lining 0.3 kg in middle waters and 0.2 kg in coastal waters, and inshore fishing (except trawling) 0.1 kg fuel. The gap between the highest and lowest may seem extremely large, and it must be remembered that in France average value of fish landed from the inshore artisanale fleet is considerably higher than the overall average, whereas average value at Boulogne (which is largely dependent on landings from the distant water and fresher trawler fleet for processing) is one of the lowest in the country.

In the UK, a 1979 study, based mainly on the Scottish inshore fleet gave the following ratios of expenditure on fuel to revenues from fish sales: 40-60ft vessels, average of 11.1 pence fuel cost per £1 of revenue from fish sales; 60-80 ft vessels, 12.8p:£1. A smaller sample covering all UK vessels gave a ratio of 19p:£1 for the nearwater trawler fleet (80-110 ft) and 18p:£1 for big freshers (110-140 ft plus). The index of fuel prices for the UK shows that marine diesel fuel which cost £20/tonne in October 1973, had risen to £185-£190/t by August 1981.

National fuel subsidies

Prices of fuel vary from one member state to another, partly because of national subsidies in some countries (Italy and France). Excluding distortions due to these aids, fuel prices in the EEC countries in March 1981 were as follows, according to the EEC Commission:

Table 79. Fuel prices in EEC countries in March 1981

Member state	Automotive diesel price on March 15, 1981 (ECU/1 000 litres)		Price of fuel for fishing vessels 3/81
	Price excl. tax and excise duty	Tax and excise duty	Prices excl. tax and excise duty
Belgium	292.75	174.26	251
Denmark	281.22	116.85	249
West Germany	263.66	219.63	inshore: 240
			deep-sea: 233
Greece	-	-	-
France	255.51	194.92	242
Ireland	314.06	202.35	260
Italy	247.22	52.25	236
Netherlands	264.46	127.71	inshore: 240
			deep-sea: 234
United Kingdom	312.70	340.20	inshore: 206-322
			deep-sea: 200-305

Source: EEC Commission.

Fuel price changes have also followed differing patterns in the member states, but in all countries the increase has been far greater than for any other major factor of production. In the Netherlands for instance, fuel prices for the middle distance fleet were 4.9 times higher in 1979 than in 1970 and for the coastal and inshore fleet 3.5 times higher (although the former figure includes import duty while the latter excludes this). The inshore fleet has generally been hit harder by the fuel cost inflation in the Netherlands. This is partly because the larger vessels have to a greater extent been subject to modernisation in recent years. The combined trends of spiralling fuel costs and higher hp/vessel have sparked off calls for the Dutch government to put an engine capacity ceiling on the fleet for its own good.

French studies have drawn a direct relation between the inflation in oil costs and the growing solvency problems of the French industrial fleet. Over the 1973-80 period fuel costs rose by 510%, although the fuel subsidy introduced in 1977 brings the real increase down to 470%. For the period of 1978-80 alone an increase of 87% took place. For the industrial fleet in France fuel costs represented 25.4% of total running costs in 1979, compared with only 11.6% in 1974, according to the Union des Armateurs a la Peche Francaise.

The increase has been especially serious in the most recent period, and in Belgium for example, fuel prices increased by 70% over the course of 1979 alone, and prices have continued to rise since then.

6. DEVELOPMENT OF TRADE IN FISH PRODUCTS

The changed conditions in the operations of the EEC fishing fleet have been by far the main influence on trading patterns in fish and fish products over the past six or seven years. Gradual loss of distant water fishing grounds has led to much increased dependence on imports, with Canada, Iceland, Norway and the Faroes being the chief suppliers, i.e. those countries in whose waters used to be concentrated EEC distant water fishing fleet effort. Canada is now set to become the world's top supplier of cod over the next few years, and one of its main markets will be the European Community. In 1979 the EEC imported nearly 90 000 tonnes cod, of which over half was in the form of frozen cod fillets. In 1974 the cod import figure was under 50 000 t, and had been lower in the preceding period.

At the same time, export trade has been set back, so that in 1979 exports of cod (excluding cured) reached only 23 000 t compared with 32 000 t in 1974. Thus the balance of trade has deteriorated on both sides. The only major species now exported in large quantities is mackerel. Where processed products are sold outside the Community it is likely that their fish content is largely a re-export.

Increased intra-EEC trade in cod

Those countries which have lost major distant water fishing grounds have at the same time begun to seek their supplies from other EEC countries. Thus intra-EEC trade in cod has doubled from 59 000 t in 1974 to 118 000 t in 1979, with the Netherlands and Denmark becoming significant suppliers of other EEC countries' needs of cod, and paying relatively little attention to the third country market. Ireland, too, has improved export performance. Denmark and the Netherlands with processing industries, relatively small domestic markets and continental marketing expertise and outlets have based their exports increasingly on supplies of raw material from third countries, and there has been continued pressure from Dutch producer organisations for higher withdrawal and reference prices.

Although the absence of tariff barriers has obviously had some influence in encouraging intra-Community trade it is clearly the changed supply situation which has been the most important factor. These developments have been most apparent for cod but also exist for the other main white fish species. For saithe, imports in 1974 were 26 000 t (from outside the EEC) but by 1979 had risen to 33 000 t. For plaice 11 866 t was imported in 1974 but by 1979 this almost doubled to 22 442 t. Imports of frozen fillet of all species have increased from 57 500 t in 1974 to 113 000 t in 1979.

French dependence on luxury imports

In addition, there have been more specific developments in certain categories. In France, for example, there have in the recent past been growing problems with imports of luxury products (shrimp and salmon etc.), which have weighed heavily on the country's net deficit in fish products. Meanwhile, in both the Netherlands and Germany the herring processing industries have become heavily dependent on imports, both from Denmark and North America.

Generally speaking it can be said that for the main categories imports have roughly doubled in the 1974-79 period, with much of the imported fillet destined for processing. Full statistical data on these imports is given in table No. 86.

This is not a passing situation. Gone are the days when the EEC could catch almost all of its own requirements of fish, and they will never return. The raw material requirements of the processing industry are unlikely to diminish, and in the UK and Germany have remained more or less constant over the past five or six years. Moreover, as processed fish now accounts for an increasing share of total fish consumption (and there is likewise little probability of a turnabout here) there is a need to ensure stable and viable raw materials for the industry. The opportunities for distant water fleets are a fraction of what they used to be, but at present it seems unlikely that the CFP, if agreed, will take full account of this truly radical turnabout in the trade situation.

Community preference inadvisable

With fisheries in most EEC states included in the brief of the agriculture minister (although France now has its own fisheries minister, as does Denmark in some years, depending on the government), it is not a complete surprise that one of the key elements of the Common Agricultural Policy - the principle of Community preference - has found a firm footing in fisheries policy. But recent years have brought a vast change between the trade situation in agricultural products - for most major farm products the EEC is at least 100% self-sufficient, whereas the last six years have made the Community so dependent on fish imports that, in purely economic terms, it would be inadvisable to apply the Community preference principle to any but the most sensitive products. That is, unless the CFP, like the CAP, is to pay only lip-service to one of the often forgotten tenets of the Treaty of Rome, namely that the farm (and fish) policy should ensure reasonable prices to the consumer and guarantee security of supplies.

Developments in whitefish trade

A comprehensive analysis of developments in trade for all products is not possible in the present context, but a brief resume of the main developments for whitefish will perhaps be useful.

For fresh or chilled cod the main increases have come in the UK, the Netherlands and Denmark, with some of the imported quantity to Denmark being processed and re-exported. Imports to the UK increased almost tenfold over the 1974-79 period. Intra-EEC trade has increased, with Denmark and the Netherlands now supplying larger amounts to the UK in particular. Icelandic supplies have also increased spectacularly to nearly 15 000 t in 1979. For frozen whole cod too the main increase has been in UK imports, with Norway, Denmark and Canada being main suppliers. UK imports of this category at 9 380 t were more than four times higher in 1979 than in 1974. Italian imports have been halved to 3 396 t.

Imports of fresh or chilled whole haddock to the UK have also increased about threefold, while the only other major increase has been for the Netherlands, where imports reached 1 592 t in 1979. Britain accounts for about two-thirds of the frozen whole haddock imported from third countries into the EEC.

Trade in fresh or chilled whole plaice has remained largely intra-Community, with the Netherlands and Denmark supplying the UK, the main market in the Community. There is also some trade between Denmark and the Netherlands. Trade in frozen whole plaice has not changed significantly.

Increased frozen cod imports

Trade in fresh cod and other fish fillets has not increased spectacularly. However, for frozen cod fillet imports have more than doubled to 50 000 t from outside the Community, of which the UK takes around 90%. France, the Netherlands and Belgium on the other hand, take most of their frozen cod fillet import requirements from other member states, notably Germany.

The Faroes and Norway have become major suppliers of frozen saithe fillet, with Germany and France accounting for over half of the 12 833 t imported from third countries. Norway still remains the chief source of frozen haddock fillet from outside the EEC, with the UK taking well over three-quarters of the amount imported by the EEC, and Norway providing around 60% of EEC import needs.

Startling growth in mackerel exports

As far as exports to third countries are concerned the startling growth has been in mackerel. From insignificant quantities exported in the early and mid-70s export sales reached 219 000 t fresh or chilled whole fish and 198 000 t frozen whole fish. Main buyer for the frozen product is Nigeria, accounting for two-thirds of sales to third countries. For the fresh product main buyers are Soviet, East German, Polish and Bulgarian factory ships.

Table 80. Summary of European Fisheries in 1980 (with percentage changes from 1980)

	Landings		Imports +)		Exports +)	
	'000 tonnes	% change	'000 tonnes	% change	'000 tonnes	% change
Belgium	32.8	- 2	120.7	+ 3	21.7	- 2
Denmark	n.a.	n.a.	246.0	+ 19	347.9	+ 6
Ireland	134.8	+ 58	11.3	+ 33	40.0	+ 75
Faroe Isles	n.a.	n.a.	n.a.	n.a.	87.0	+ 5
Finland	n.a.	n.a.	22.4	+ 12	3.7	+ 65
France	692.8	+ 4	409.4	+ 3	118.5	+ 14
W. Germany	286.9(1)	- 13	403.4	+ 11	126.3	+ 8
Iceland	1 500.8	- 9	n.a.	n.a.	291.5	- 11
Italy	n.a.	n.a.	298.6	- 2	88.4	- 21
Netherlands	303.6	+ 4	158.8	+ 17	323.7	+ 8
Norway	2 408.1(2)	- 9	45.2	+ 40	291.5	- 11
Portugal	212.7	=	72.8	+ 2	50.6	+ 6
Spain	1 352.0	+ 2	280.4	+ 14	151.3	- 27
Sweden	181.2	+ 13	89.2	+ 4	87.6	+ 5
UK	756.9	- 9	307.4	+ 6	362.3	- 2

Notes: (1) Catch weight. (2) Nominal weight. n.a. not available or not applicable.
+ Fish and fish products for human consumption only. The figures are in product weight tonnes.
Source: Eurofish Supplies Bulletin, WFA.

Tables 81 and 82 - Imports and exports of major species, 1974/1979 are set out in Appendix I.

Table 83. Germany: External trade in fish and fish products, 1979 and 1980

	Imports						Exports					
	1980			1979			1980			1979		
	Quant. '000 t*	Value** Million DM	Million $	Quant. '000 t*	Value** Million DM	Million $	Quant. '000 t*	Value** Million DM	Million $	Quant. '000 t*	Value** Million DM	Million $
Total fish and fish products	786	1767.8	973.2	722	1544.4	812.8	204	540.4	297.5	173	483.1	254.2
of which:												
Fresh, chilled	139	429.1	236.2	126	389.5	205.0	14	40.0	22.0	13	36.3	19.1
Frozen	152	417.2	229.7	132	335.3	176.5	65	192.8	106.1	62	181.3	95.4
of which:												
Frozen fillets	47	149.3	82.2	29	83.9	44.2	34	144.8	79.7	35	141.3	74.4
Salted, dried, smoked	30	132.8	73.1	29	121.4	63.9	2	15.7	8.7	3	16.3	8.6
Canned	53	263.2	144.9	52	231.4	121.8	25	148.1	81.5	27	145.8	76.7
Shellfish (live, fresh, chilled, salted, dried, canned)	29	199.0	109.5	25	179.2	94.3	20	67.6	37.2	12	53.2	28.0
Meal	238	190.7	105.0	222	157.4	82.8	75	72.0	39.6	53	45.6	24.0
Oil	144	114.6	63.1	136	111.2	58.5	3	2.3	1.3	3	2.5	1.3
Other	1	21.2	11.7	-	19.0	10.0	-	2.0	1.1	-	2.1	1.1

Notes: * Landed weight. ** 1979 : 1 US$ = 1.90 DM
1980 : 1 US$ = 1.8165 DM.

Source: OECD.

Table 84. Germany: Import of fishes etc. in 1979

Imports January-December 1979	Aquarium fish		Roe, liver, milt		Freshwater fish		Fresh, frozen herring including fillet		Fresh, frozen sea fish, including fillet (except herring)	
	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM
EEC										
Belgium/Lux.	0	4	6	11	12 513	7 370	200	27	6 552	3 026
France	0	6	3	11	13 101	7 015	7 863	1 517	134 737	38 358
Italy	14	164	-	-	10 740	7 191	-	-	28 714	6 812
Netherlands	89	1 373	601	101	10 092	11 390	15 891	3 330	156 964	37 571
Denmark	-	-	1 406	510	136 570	102 631	408 334	83 942	405 549	102 535
UK	10	185	5	1	187	345	12 700	2 061	62 054	8 787
Ireland	-	-	-	-	573	836	16 929	3 806	29 677	3 213
EEC Total	113	1 732	2 021	634	183 776	136 778	461 917	94 683	824 247	200 302
Third countries										
Iceland	-	-	-	-	1	2	4 434	906	116 893	19 598
Norway	-	-	339	110	12 153	20 439	7 765	1 801	88 682	19 952
Sweden	0	5	4	15	5 383	6 413	37 503	5 774	4 832	704
Faroes	-	-	76	17	3	10	881	98	90 287	22 408
Portugal	-	-	-	-	-	-	-	-	6	9
Morocco	-	-	-	-	-	-	-	-	152	187
Poland	-	-	-	-	7 322	6 649	232	22	14 672	1 906
Yugoslavia	0	4	-	-	12 325	4 204	-	-	-	-
USA	18	410	4	12	14 488	17 140	110 400	21 193	11 138	4 795
Canada	-	-	66	30	20 396	19 377	295 760	55 622	9 351	3 514
Argentina	0	12	-	-	-	-	-	-	108 653	23 007
Japan	27	643	1	3	857	557	-	-	8 653	2 993
USSR	-	-	-	-	-	-	-	-	35 000	2 414
Others	1 008	15 382	7	6	37 884	18 459	6 494	580	46 256	12 327
Total	1 166	18 188	2 518	827	294 588	230 028	925 386	180 679	358 822	314 116

Table 85. Germany: Export of fishes etc. in 1979

Exports January-December 1979	Aquarium fish		Roe, liver milt		Freshwater fish		Fresh frozen herring including fillet		Fresh, frozen sea fish, including fillet (except herring)	
	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM
EEC										
Belgium/Lux.	0	42	1 969	1 080	-	-	3 564	804	79 547	31 892
France	14	427	487	398	0	1	1 422	259	157 017	56 893
Italy	2	49	142	99	-	-	-	-	29 271	11 040
Netherlands	11	157	871	757	-	-	8 225	1 628	48 762	18 475
Denmark	0	10	919	1 010	1 872	310	2 804	680	30 329	4 360
UK	1	41	519	316	-	-	160	45	127 001	40 935
Ireland	-	-	-	-	-	-	174	17	167	65
EEC Total	28	726	4 907	3 660	1 872	311	16 349	3 433	472 094	163 660
Third countries										
Austria	15	261	428	363	-	-	374	78	30 620	14 393
Switzerland	15	302	2 906	1 913	-	-	-	-	3 271	2 221
Greenland	-	-	-	-	-	-	197	42	8 175	1 088
Spain	0	6	-	-	-	-	-	-	1 032	187
Sweden	1	37	123	92	-	-	-	-	3 951	1 729
USSR	0	9	2	3	-	-	289	50	155 029	16 895
Africa	0	10	11	37	-	-	911	222	10 354	677
America	0	24	1	6	-	-	-	-	4 919	1 486
Asia	2	394	5	12	-	-	-	-	20 252	3 179
Australia	0	4	-	-	-	-	19	5	348	123
Others	1	29	141	410	-	-	-	-	14 021	1 680
Total	62	1 802	8 524	6 496	1 872	311	18 139	3 830	724 066	207 318

Source: German Fisheries Yearbook, 1979/80.

Salt herring		Cured fish (except salt herring)		Shellfish, molluscs		Prepared, canned fish		Prepared, canned shellfish, molluscs		Total	
100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM
3	3	520	468	766	747	471	227	3 117	3 670	24 148	15 553
38	14	3 496	2 171	12 440	13 331	16 393	4 947	5 969	9 555	193 767	76 925
-	-	823	197	10 451	4 436	12 536	7 290	2 319	1 298	65 597	27 388
134 529	47 739	35 916	16 032	21 190	9 116	65 172	33 791	4 596	1 868	445 040	162 311
489	100	13 605	18 415	68 542	7 625	72 694	30 425	21 508	20 025	1 128 697	366 208
1 538	355	103	306	2 427	4 203	1 320	685	2 692	4 321	83 036	21 249
18 567	4 770	129	470	313	878	8 073	3 033	5	10	74 266	17 016
155 164	52 981	54 592	38 059	116 129	40 336	176 659	80 398	39 933	40 747	2 014 551	686 650
56	10	18 456	6 958	149	298	23 848	8 163	6 821	8 266	170 658	44 201
401	118	28 242	11 110	412	774	10 681	4 020	4 767	7 025	153 442	65 349
166	52	68	145	19	32	5 175	2 189	609	929	53 759	16 258
-	-	15 983	5 573	11	8	-	-	10	15	107 251	28 129
-	-	-	-	-	-	39 477	23 239	13	10	39 496	23 258
-	-	-	-	11	30	20 876	11 687	-	-	21 039	11 904
-	-	-	-	752	306	10 398	2 255	-	-	33 376	11 138
-	-	-	-	653	231	2 975	1 045	24	23	15 977	5 507
373	123	129	417	5 243	2 069	613	1 871	999	478	143 405	48 508
5 140	1 308	6 339	2 412	2 951	3 787	64 519	18 920	1 837	3 669	406 359	108 639
-	-	404	54	1 581	631	20	5	-	-	110 658	23 709
-	-	37	71	111	317	12 606	6 660	21	35	22 313	11 279
-	-	6	15	-	-	3 813	8 540	910	4 922	39 729	15 891
22	7	4 518	1 969	29 487	34 766	149 695	62 414	36 923	29 484	312 294	175 394
161 322	54 599	128 774	66 783	157 509	83 585	521 355	231 406	92 867	95 603	3 644 307	1 275 814

Salt herring		Cured fish (except salt herring)		Shellfish, molluscs		Prepared, canned fish		Prepared, canned shellfish, molluscs		Total	
100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM	100 kilos	tonnes DM
-	-	3 419	1 111	3 880	1 222	28 142	17 060	5 640	9 814	126 161	63 025
77	47	270	406	8 128	3 888	43 225	25 652	795	1 656	211 435	89 627
-	-	2 397	1 406	3 713	538	70 969	35 810	3	6	106 497	48 948
306	88	422	189	77 025	18 521	29 818	14 847	11 200	12 719	176 640	67 381
0	1	346	60	896	714	3 033	1 859	974	890	41 173	9 894
-	-	26	6	4 287	1 335	1 523	667	11	9	133 528	43 354
-	-	-	-	-	-	461	254	-	-	802	336
383	136	6 880	3 178	97 929	26 218	177 171	96 149	18 623	25 094	796 236	322 565
296	101	1 174	1 085	524	735	37 252	19 967	462	363	71 145	37 346
-	-	686	1 738	229	331	4 591	3 520	39	74	11 737	10 099
-	-	2	9	-	-	636	1 031	2	3	9 012	2 173
-	-	553	395	1	1	1 417	941	0	1	3 003	1 531
105	23	17	21	68	95	768	309	6	5	5 039	2 311
600	149	1	8	-	-	33 164	13 014	2	1	189 087	30 129
1	1	11 783	5 236	-	-	4 595	2 030	7	11	27 662	8 224
2	1	3 077	1 532	-	-	6 080	4 451	6	6	14 085	7 506
-	-	5 902	2 724	61	96	3 172	1 856	15	33	29 409	8 294
2	2	-	-	-	-	2 871	2 070	-	-	3 240	2 204
-	-	9	10	33	34	537	475	38	57	14 780	2 695
1 389	413	30 084	15 936	98 845	27 510	272 254	145 813	19 200	25 648	1 174 435	435 077

Table 86. Community trade by product grouping, 1975-79

		Imports into the Community		Exports from the Community		Net imports		Intra-Community trade	
		' 000 t	M EUA	' 000 t	M EUA	' 000 t	M EUA	' 000 t	M EUA
Fish, fresh, chilled and frozen	1975	436.1	315	129.9	126	336.2	195	442.2	357
	1976	440.6	437	154.1	178	336.8	259	467.6	440
	1977	507.7	540	180.7	208	327.0	332	490.6	526
	1978	550.5	615	408.0	242	142.5	373	530.6	606
	1979	607.1	734	554.3	277	52.8	457	568.6	711
Fish, dried, salted or in brine; smoked fish	1975	45.4	67	37.0	33	8.4	34	52.2	46
	1976	53.2	101	35.3	39	18.0	62	51.1	54
	1977	63.4	117	28.0	42	35.4	75	44.9	65
	1978	69.1	128	20.8	39	48.3	89	47.6	74
	1979	76.4	145	22.7	44	53.7	101	49.3	83
Crustaceans and molluscs whether in shell or not, fresh or simply boiled	1975	83.6	130	58.3	39	25.3	91	102.5	72
	1976	97.3	173	51.3	46	45.9	127	111.7	102
	1977	92.7	177	32.4	48	60.3	129	106.2	124
	1978	128.7	259	44.0	51	84.7	208	111.5	151
	1979	141.3	297	53.0	66	83.3	231	116.5	174
Fish preparations and preserves, caviar	1975	159.4	241	31.2	42	128.2	199	49.1	69
	1976	17.38	289	32.3	52	141.6	237	59.3	95
	1977	160.4	288	29.0	57	131.4	231	60.2	109
	1978	151.5	288	31.4	65	120.1	223	57.7	114
	1979	163.6	326	32.0	69	136.6	257	64.5	133
Molluscs, whether in shell or not, prepared or preserved	1975	55.0	97	4.9	13	28.1	84	12.0	34
	1976	35.5	121	6.7	16	28.8	104	15.2	44
	1977	37.9	147	7.1	19	30.8	128	16.3	59
	1978	39.7	164	7.4	21	32.3	143	16.6	66
	1979	45.9	201	6.6	20	39.3	181	18.6	77
Total	1975	757.5	851	261.3	247	496.2	603	658.0	577
	1976	820.5	1 120	279.6	330	540.9	790	704.9	736
	1977	862.1	1 269	277.2	374	584.8	895	718.1	882
	1978	939.5	1 454	511.6	418	427.9	1 036	764.0	1 011
	1979	1 039.3	1 703	668.6	477	370.6	1 227	807.5	1 178

Source: EUROSTAT, External trade, microfiches

Table 87. EEC fish consumption per head of population (live weight, in kg per capita)

Fish		Germany	Belgium/ Lux.	Denmark	France	Ireland	Italy	Nether-lands	UK	EEC-9
Fresh, frozen, whole and filleted	1972/73	3.7	4.4	25.0	9.9	4.7	6.6	5.1	13.5	8.3
	1974	5.7	4.3	14.3	10.4	5.8	6.0	5.9	11.9	8.3
	1975	3.1	3.4	10.9	9.2	7.4	6.2	6.0	11.9	7.8
	1976	3.8	7.6	12.4	10.7	7.5	6.1	5.5	13.0	8.1
	1977		7.0	14.2			5.7	7.1	10.7	
	1978	2.2	5.5	22.5	9.8	3.2	6.9	5.8	15.4	8.5
of which:	1972/73	3.4			1.5				4.9	
frozen in fillets	1974	4.7	2.2	0.6	2.1	0.8	0.4	-	6.4	-
	1975	1.7	1.3	0.8	1.8	2.7	0.5	-	7.1	-
	1976	2.4	2.9	2.9	1.3	6.0	0.6	-	6.8	-
	1977		3.3				1.5			
	1978	2.3			1.5					
Preparations and preserves of which: salted, dried	1972/73	1.5	2.3	2.1	1.4	0.7	2.3	1.9	0.5	1.5
	1974	1.4	2.1	1.1	1.4	0.6	1.9	2.0	1.4	1.5
	1975	1.5	1.5	1.3	1.0	1.0	1.7	2.1	1.1	1.4
	1976	1.8	1.4	0.3	1.3	0.9	1.9	1.1	0.9	1.4
	1977		1.1	1.4			1.9	2.0	1.6	
	1978	3.3	2.9	1.5	1.8	2.2	2.5	2.1	1.1	2.2
preserves, preparations	1972/73	3.5	2.4	4.8	3.1	1.0	2.2	1.0	2.5	2.8
	1974	3.4	2.8	6.2	3.3	0.8	2.1	1.9	1.7	2.7
	1975	3.9	2.3	8.7	3.3	0.9	1.7	1.8	2.2	2.8
	1976	3.9	3.6	7.4	3.1	1.0	1.5	1.9	2.3	2.8
	1977		2.8	9.4			2.2	1.0	3.3	
	1978	4.3	2.9	5.9	3.4	0.6	1.7	1.3	2.2	3.0
Total fish	1972/73	9.3	9.3	31.8	14.4	6.3	11.1	8.2	16.5	12.3
	1974	10.5	9.3	21.6	15.1	7.2	9.9	11.1	15.0	12.5
	1975	8.4	7.2	20.9	13.5	9.4	8.5	9.8	15.3	11.2
	1976	9.5	12.6	20.1	15.1	9.4	9.4	8.5	16.0	12.3
	1977		10.9	25.0			9.8	10.1	15.6	
	1978	8.9	11.3	20.8	14.9	6.0	10.9	9.2	18.8	13.5
Molluscs and crustaceans	1972/73	0.5	3.7	4.5	5.6	1.8	1.8	2.7	1.9	2.5
	1974	0.6	4.4	5.2	5.4	1.2	1.7	3.2	1.8	2.4
	1975	0.7	4.9	2.6	6.7	1.1	2.0	3.5	1.8	2.8
	1976	0.7	5.4	5.9	6.0	3.0	2.3	4.2	2.1	3.0
	1977		5.7	5.1			1.0	4.0	1.8	
	1978	0.7	6.5		5.4		2.0	2.6		

Source: OECD Statistics on fisheries.

Table 88. France: External trade in fish and fish products, 1979 and 1980

	Imports				Exports			
	1980		1979		1980		1979	
	Quantity tonnes	Value '000 FF	Quantity tonnes	Value '000 FF	Quantity tonnes	Value '000 FF	Quantity tonnes	Value '000 FF
Total fish and fish products	447 691	4 464 641	458 942	4 117 887	96 076	1 054 977	121 718	1 032 049
of which: fresh, chilled [1]	111 675	1 221 599	110 136	1 165 067	50 288	583 228	43 975	480 047
of which: frozen fillets	81 996	575 752	98 703	561 337	9 400	87 649	28 930	144 168
Salted, dried, smoked	18 537	228 683	18 323	185 077	3 454	56 029	4 256	61 887
Canned	55 385	683 477	55 990	612 373	2 731	42 885	3 978	51 592
Shellfish (live, fresh, chilled, salted, dried, canned	83 130	1 142 180	80 105	1 029 548	12 286	224 753	15 041	223 577
Meal	19 787	440 100	18 933	412 128	773	23 160	760	21 041
Oil	60 531	133 787	59 962	115 010	12 979	26 175	17 549	32 522
Other	16 650	39 036	16 790	37 347	4 165	11 098	7 229	17 215
(1) Anadromous fish	16 404	473 652	16 413	484 985	2 915	94 564	3 393	98 566

Source: OECD.

Table 89. France: Exports of fish and fish products, 1980

Exports - 1980	Tonnage (tonnes)	Value (F '000)	Average price (Fr/kg)
Fresh, frozen seafish	89 099	843 700	9.47
of which:			
a) Fresh or chilled			
Haddock	462	1 968	4.26
Herring	12 167	25 161	2.07
Saithe	6 863	24 125	3.52
Mackerel	5 106	14 916	2.92
Plaice	404	1 428	3.54
Sardine	397	583	1.47
Redfish	341	1 695	4.97
b) Frozen			
Cod fillet	1 667	19 031	11.42
Saithe	2 185	18 230	8.35
Mackerel	1 703	3 697	2.17
Albacore	10 692	77 439	7.24
Cured fish	5 916	90 200	15.25
of which:			
Anchovy	1 644	6 933	4.22
Cod	1 522	19 923	13.09
Salmon	(404)	(32 071)	(79.31)
Prepared, canned fish	6 572	150 600	22.92
Crustaceans and molluscs	16 917	289 300	17.10
Total	118 504	! 373 800	11.59

Source: GERMES

Table 90. France: Imports of fish and fish products, 1980

	Tonnage (tonnes)	Value (F '000)	Average price (Fr/kg)
Fresh, frozen seafish of which:	214 593	1 982 900	9.24
a) Fresh or chilled			
Anchovy	1 925	5 006	2.60
Cod	25 011	155 050	6.20
Herring	2 597	11 801	4.54
Saithe	2 741	17 457	6.37
Mackerel	17 098	25 225	1.48
Whiting	2 112	6 873	3.25
Plaice	82	468	5.73
Sole	3 011	101 634	33.76
Sardine	9 652	26 440	2.74
Shark	2 348	24 737	10.54
Cod fillet	5 160	54 628	10.59
b) Frozen			
Anchovy	77	286	2.60
Cod	865	5 137	5.94
Cod fillet	12 569	135 955	10.82
Haddock fillet	857	9 740	11.37
Herring	5 750	30 651	5.33
Saithe fillet	4 868	38 923	8.00
Mackerel	3 711	7 410	2.00
Sole	1 256	22 847	18.19
Sardine	17 123	35 888	2.10
Frozen albacore	4 957	30 966	6.25
Redfish fillet	1 608	11 964	7.44
Shark	2 272	13 644	6.01
Salmon	(15 919)	(468 450)	(29.43)
Cured fish of which:	18 579	230 100	12.38
Anchovy	1 663	9 989	6.01
Cod	11 811	152 334	12.90
Herring	2 599	12 566	4.83
Salmon	(258)	(25 708)	(99.64)
Prepared or canned	79 556	1 183 900	14.88
Crustaceans, molluscs (excluding canned)	96 712	1 328 100	13.73
Total	409 440	4 725 000	11.54

Source: GERMES

Table 91. Italy: External trade in fish and fish products, 1979 and 1980

	Imports				Exports			
	1980		1979		1980		1979	
	Quantity tonnes	Value '000 000 lires	Quantity tonnes	Value '000 000 lires	Quantity tonnes	Value '000 000 lires	Quantity tonnes	Value '000 000 lires
Total fish and fish products	343 358	667 085	395 183	600 140	91 779	93 672	123 011	99 484
of which:								
fresh, chilled	83 863	215 975	25 167	70 710	21 198	26 585	29 725	30 230
frozen	44 053	66 240	121 983	156 301	31 455	23 295	38 558	24 409
of which:								
frozen fillets	3 713	43 924	21 843	52 938	261	844	469	1 223
Salted, dried, smoked	42 132	144 241	43 596	116 252	1 761	4 622	1 929	3 421
Canned	25 934	68 779	25 740	60 351	5 394	17 572	6 492	17 888
Shellfish (live, fresh, chilled, salted, dried canned	968	6 245	8 472	5 148	1 861	1 392	2 825	2 452
Meal	81 780	32 064	105 158	38 405	4 559	2 417	10 836	4 486
Oil	4 055	2 450	8 247	4 536	22	24	753	268
Other	60 573	131 091	56 817	95 499	25 529	17 765	31 893	16 330

Source: OECD.

Table 92. Netherlands: External trade in fish and fish products, 1979 and 1980

	Imports				Exports			
	1980*		1979		1980*		1979	
	Quantity '000 kg product weight	Value '000 guilders	Quantity '000 kg product weight	Value '000 guilders	Quantity '000 kg product weight	Value '000 guilders	Quantity '000 kg product weight	Value '000 guilders
Total fish and fish products	355 645	776 915	350 139	730 679	376 064	1 053 217	368 825	1025 954
of which:								
fresh, chilled	50 029	154 579	40 179	128 447	84 788	351 650	73 000	332 000
frozen	48 167	149 063	48 414	159 015	142 790	281 523	148 500	288 900
of which:								
frozen fillets	(10 029)	(55 740)	(10 581)	(56 489)	(18 691)	(116 377)	(19 320)	(121 109)
Salted, dried, smoked	15 590	37 725	15 190	36 444	21 057	89 271	22 030	91 524
Canned	11 040	67 584	9 941	58 265	8 100	46 749	8 289	44 807
Shellfish (live, fresh, chilled, salted, dried, canned)	31 390	184 096	21 802	162 035	65 711	249 983	67 603	241 930
Meal	48 287	50 820	54 494	45 433	12 510	13 114	12 913	11 655
Oil	150 031	132 443	159 219	140 528	11 408	14 127	7 990	8 625
Other	1 111	605	900	512	29 700	6 800	28 500	6 513

* Provisional figures and estimates.
Source: OECD.

Table 93. Dutch foreign trade in fish products, 1979 and 1980

	Imports				Exports			
	1980		1979		1980		1979	
	Tonnes	Hfl '000	Tonnes	Hfl '000	Tonnes	Hfl '000	Tonnes	Hfl '000
Freshwater fish	7 851	94 220	8 435	94 429	3 756	39 003	4 195	39 661
Fresh, frozen herring	40 297	78 938	32 023	74 879	5 203	11 651	4 380	10 864
Seafish, fresh, chilled, frozen	41 529	73 463	36 240	62 436	194 704	438 319	175 634	408 588
Seafish, filleted	8 003	44 840	8 497	46 038	17 010	111 904	16 866	114 027
Dried, smoked herring	13 381	27 791	14 362	30 985	18 204	66 714	17 311	65 378
Other smoked or salted fish	1 338	8 379	819	5 348	4 582	28 396	4 430	26 992
Crabs	770	16 461	639	13 409	489	13 726	552	16 248
Shrimps	9 573	66 383	6 739	46 209	9 547	72 195	6 711	53 627
Oysters	1 150	9 128	1 388	11 816	654	9 650	1 410	18 265
Mussels	9 456	4 865	1 080	665	43 165	60 113	43 496	56 931
Other shellfish and molluscs	3 723	9 545	5 185	7 576	5 033	22 944	4 646	19 736
Fish oil	141 861	126 243	160 119	142 247	12 562	16 959	10 128	12 693
Preparations of fish	14 597	87 730	13 433	75 996	13 454	76 966	12 882	71 738
Preparations of shellfish and molluscs	7 232	78 952	6 780	82 520	7 892	81 978	7 394	84 239
Fishmeal	11	162	8	112	2	22	-	-
Total	300 773	727 099	295 747	694 666	336 257	1 050 538	310 033	998 988

Source: CBS.

Table 94. Dutch exports of fish and fish products

	1970		1977	
	'000 Tonnes	Hfl M	'000 Tonnes	Hfl M
Belgium/Luxembourg	67.7	89.4	47.5	174.1
Denmark	47.2	76.2	45.9	172.9
Germany	4.6	6.4	1.8	4.5
France	68.1	114.9	52.9	172.1
Italy	11.9	51.5	16.5	110.5
UK and Ireland	8.6	17.7	29.8	77.5
Others	15.2	44.6	69.5	137.7
Total	223.4	400.7	263.9	849.3

Source: Fisheries of Denmark.

Table 95. Belgian exports of fish and fish products, 1970-1979

	Fresh, frozen		Prepared		Shellfish, molluscs		Processed, canned fish		Canned, processed, molluscs, shellfish		Total	
	Tonnes	1 000 F	Tonnes	1 000 F	Tonnes	1 000 F	Tonnes	1 000 F	Tonnes	1 000 F	Tonnes	1 000 F
1970	20 918	593 933	7 391	182 580	312	19 452	334	18 464	45	5 282	29 007	819 711
1971	23 046	660 786	6 538	195 225	198	21 673	366	22 472	67	13 480	30 215	913 636
1972	19 916	632 620	6 286	201 071	549	58 297	1 052	62 499	50	7 239	27 853	961 726
1973	18 889	757 997	3 802	141 605	665	70 808	2 683	169 088	189	37 671	26 228	1 177 169
1974	16 157	735 952	2 766	143 557	476	59 621	2 826	214 089	190	37 636	22 415	1 190 855
1975	14 200	655 879	2 358	124 503	814	87 719	2 622	197 601	251	51 455	20 245	1 117 179
1976	14 851	846 501	2 578	145 969	804	106 558	2 395	197 246	265	54 609	20 893	1 350 883
1977	15 277	823 521	1 248	83 794	2 372	285 344	2 023	187 675	269	67 506	21 189	1 447 840
1978	16 821	904 749	996	71 222	2 600	336 275	2 081	176 783	202	56 705	22 700	1 545 734
1979	14 382	932 852	968	69 902	2 618	332 248	1 965	167 312	500	157 805	20 433	1 660 119

Source: INS.

Table 96. Belgian imports of fish and fish products, 1970-1979

	Fresh, frozen		Prepared		Shellfish, molluscs		Processed canned fish		Canned, processed, molluscs, shellfish		Total	
	Tonnes	1 000 F	Tonnes	1 000 F	Tonnes	1 000 F	Tonnes	1 000 F	Tonnes	1 000 F	Tonnes	1 000 F
1970	41 703	853 284	15 310	234 245	25 326	757 306	16 698	728 402	1 965	213 725	101 002	2 834 962
1971	42 128	1 041 685	12 271	242 974	26 047	837 784	19 556	978 540	2 541	315 025	102 543	3 416 008
1972	41 122	1 144 252	9 736	238 556	29 862	1 005 671	20 481	983 398	2 352	278 790	103 553	3 650 667
1973	40 917	1 260 817	7 338	246 216	25 903	1 140 234	21 444	1 177 691	3 043	454 341	98 695	4 279 299
1974	41 665	1 557 793	6 550	278 457	30 260	1 320 105	22 760	1 556 055	2 729	497 602	103 964	5 210 012
1975	38 212	1 434 421	5 724	313 239	28 465	1 488 660	17 630	1 235 279	2 924	500 026	92 955	4 971 625
1976	43 139	1 903 427	5 262	370 773	30 299	2 052 434	22 658	1 701 944	2 988	541 558	104 346	6 570 136
1977	39 909	2 159 317	4 175	397 294	35 322	2 366 395	20 356	1 628 060	3 470	641 913	103 232	7 192 979
1978	35 937	2 179 139	4 118	432 215	35 279	2 530 268	21 587	1 759 155	3 457	702 660	100 378	7 630 437
1979	39 847	2 572 025	3 341	450 670	38 029	3 058 795	21 042	1 729 798	3 898	994 014	106 157	8 805 302

Source: INS.

Table 97. Belgium: External trade in fish and fish products, 1979 and 1980

	Imports				Exports			
	1980		1979		1980		1979	
	Quantity tonnes product weight	Value x 1 000 BF	Quantity tonnes product weight	Value x 1 000 BF	Quantity tonnes product weight	Value x 1 000 BF	Quantity tonnes product weight	Value x 1 000 BF
Total fish and fish products (inclusive of meal)	143 535	10 138 118	152 280	10 682 879	41 651	2 066 015	33 621	2 025 240
Total (exclusive of meal)	109 590	9 619 138	117 153	10 228 506	20 234	1 797 842	22 029	1 876 913
Fresh, chilled	25 339	2 068 134	34 567	3 261 027	10 795	681 693	11 656	792 570
Frozen	17 860	875 297	16 276	734 202	3 677	334 604	4 322	357 076
Salted, dried, smoked	2 726	478 674	3 341	450 670	593	43 597	968	69 902
Shellfish (fresh, chilled, salted, dried)	38 769	3 360 746	38 019	3 058 795	2 238	311 388	2 618	332 248
Canned	24 896	2 836 287	24 940	2 723 812	2 931	426 560	2 465	325 117
Meal	33 945	518 980	35 127	454 373	21 417	268 173	11 592	148 327
Oil	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-

Source: OECD.

Table 98. United Kingdom: External trade in fish and fish products, 1979 and 1980

	Imports				Exports			
	1980 *		1979		1980 *		1979	
	Quantity '000 tonnes product weight	Value £'000	Quantity '000 tonnes product weight	Value £'000	Quantity '000 tonnes product weight	Value £'000	Quantity '000 tonnes product weight	Value £'000
Total fish and fish products of which:	815	455 000	779	421 414	302	150 100	383	149 164
fresh, chilled	120	57 118	104	55 770	136	29 240	197	30 638
frozen	118	115 789	120	122 189	112	42 459	132	46 051
of which: frozen fillets	80	85 647	80	88 979	11	13 255	11	13 512
Salted, dried, smoked	3	3 400	4	3 170	7	7 700	14	13 325
Canned	65	106 200	52	75 945	7	14 500	7	10 256
Shellfish (live, fresh, chilled, salted, dried, canned)	33	69 200	29	61 210	30	51 900	24	46 006
Meal	225	52 700	255	55 499	8	2 500	6	1 584
Oil	251	50 600	215	47 631	2	1 800	3	1 264

* Estimated
Source: OECD.

Table 99. United Kingdom: Summary of white fish imports (product weight)

Type of product	1979		1980		Percentage change	
	Tonnes	£'000	Tonnes	£'000	Weight	Value
Fresh	100,181	51,706	113,289	53,377	+13.1	+ 3.2
Frozen: Fillets						
Skin-on	33,355	38,852	27,410	30,129	−17.8	−22.5
Skinless	7,203	8,793	8,526	9,815	+18.4	+11.6
Industrial blocks	27,630	30,359	29,605	32,366	+ 7.1	+ 6.6
Other and unspecified	10,027	8,137	12,042	9,487	+20.1	+16.6
Whole, headless or in pieces	26,356	15,305	22,519	12,967	−14.6	−15.3
Salted, in brine, dried or smoked	2,599	2,365	1,644	2,099	−36.7	−11.2
Shellfish	29,299	61,284	33,537	68,179	+14.5	+11.3
Other prepared or preserved fish	40,699	45,218	41,414	47,453	+ 1.8	+ 4.9
TOTAL	277,349	262,019	289,986	265,872	+ 4.6	+ 1.5

Source: Based on HM Customs and Excise statistics

Table 100. United Kingdom: Summary of white fish exports (product weight

Type of product	1979		1980*		Percentage change	
	Tonnes	£'000	Tonnes	£'000	Weight	Value
Fresh	193,730	25,334	*	*	*	*
Frozen: Fillets						
Skin-on	79	114	111	193	+ 40.5	+ 69.3
Skinless	455	669	770	1,061	+ 69.2	+ 58.6
Industrial blocks	232	290	732	782	+215.5	+169.7
Other and unspecified	5,800	5,427	*	*	*	*
Whole, headless or in pieces	116,762	27,967	*	*	*	*
Salted, in brine, dried or smoked	5,348	4,980	4,896	4,423	− 8.5	− 11.2
Shellfish	23,602	46,006	29,809	49,219	+ 26.3	+ 7.0
Other prepared or preserved fish	9,643	13,649	10,591	15,604	+ 9.8	+ 14.3
TOTAL	355,651	124,436	*	*	*	*

* Not available due to amendments to be made by HM Customs and Excise

Source: Based on HM Customs and Excise statistics

Table 101. Denmark: External trade in fish and fish products, 1979 and 1980

	Imports				Exports			
	1980		1979		1980		1979	
	Quantity 1 000 kg	Value 1 000 D kr	Quantity 1 000 kg	Value 1 000 D kr	Quantity 1 000 kg	Value 1 000 D kr	Quantity 1 000 kg	Value 1 000 D kr
Total fish and fishproducts	373 523	1 929 979	310 327	1 465 676	794 817	5 663 198	688 707	4 549 889
of which:								
fresh, chilled	175 888	589 402	145 225	463 143	94 838	848 975	97 281	753 955
frozen	13 834	80 371	14 832	73 576	27 683	172 197	28 383	156 463
of which:								
fresh, chilled fillets	1 157	6 628	934	8 178	61 414	578 979	50 717	427 431
frozen fillets	4 405	44 292	3 328	26 572	54 767	750 672	51 724	645 330
Salted, dried, smoked	9 916	105 432	10 317	100 400	15 923	329 987	14 556	273 980
Canned or prepared	13 087	450 743	11 720	337 202	46 300	820 238	40 601	660 209
Shellfish (live, fresh, chilled)	22 272	298 106	12 496	156 876	33 259	459 034	22 437	316 667
Freshwater	7 123	257 625	7 225	222 796	20 043	524 869	21 317	494 682
Meal	6 207	16 994	6 987	16 519	299 318	910 315	258 452	651 933
Oil	1 246	3 369	1 972	4 704	97 360	224 964	64 431	136 885
Other	118 388	77 017	95 291	55 710	43 912	41 968	38 808	32 354

Source: OECD.

Table 102. Danish exports

	1978		1979	
	Tonnes	D kr '000	Tonnes	D kr '000
UNPROCESSED PRODUCTS				
I Fish for human consumption				
a) Saltwater fish, fresh and frozen				
Herring	22 704	135 400	28 155	156 239
Flatfish	19 228	180 787	19 551	198 851
Cod	29 103	247 741	33 310	284 644
Haddock	5 501	37 475	4 918	37 486
Saithe	5 406	35 948	6 001	42 140
Other types of cod fish	2 038	16 936	1 924	15 177
Mackerel	16 017	49 602	20 959	60 003
Other saltwater fish	10 326	106 608	10 846	115 878
Saltwater fish in total	110 323	810 497	125 664	910 418
b) Freshwater fish				
Pond trout, roe and young fish	14 248	243 060	15 051	276 079
Salmon and sea trout	2 481	76 880	2 848	101 883
Eel	2 948	107 373	2 800	108 422
Other freshwater fish	544	6 158	618	8 298
Freshwater fish in total	20 221	433 471	21 317	494 682
c) Crustaceans and molluscs				
Prawn	13 364	194 704	14 397	229 694
Other crustaceans and molluscs	3 078	56 787	8 040	86 973
Crustaceans and molluscs in total	16 442	251 491	22 437	316 667
I Fish for human consumption in total	146 986	1 495 459	169 418	1 721 767
II Fish for industrial purposes in total	2 334	1 281	4 027	2 053
PROCESSED PRODUCTS				
III Fish for human consumption				
a) Fillets, fresh and frozen				
Herring	33 308	219 721	40 601	256 190
Flatfish	10 409	177 780	12 658	251 957
Cod	34 951	436 730	34 753	437 864
Other types of fish	11 177	91 527	14 429	126 750
Fillets in total	89 845	925 758	102 441	1 072 761
b) Wetsalted, dried and smoked fish				
Cod	4 748	53 473	8 813	96 892
Salmon	1 214	91 841	1 334	115 170
Other types of fish	3 151	44 652	4 409	61 918
Wetsalted, dried and smoked fish in total	9 113	189 966	14 556	273 980
c) Prepared and canned fish				
Herring	4 227	52 747	5 652	68 832
Mackerel	5 951	67 360	6 859	78 061
Fish finger	9 188	142 280	8 209	135 547
Prawn	2 858	119 395	2 705	132 455
Mussel	6 987	63 066	7 842	74 006
Other types of fish	7 180	120 562	9 334	171 308
Prepared and canned fish in total	36 391	565 410	40 601	660 209
III Fish for human consumption in total	135 349	1 681 134	157 598	2 006 950
IV Fish meal and fish oil etc.				
Fish meal	246 598	697 923	258 452	651 933
Fish oil	66 077	154 043	64 431	136 885
Other types	22 154	18 867	34 781	30 301
IV Fish meal and fish oil etc. in total	334 829	870 833	357 664	819 119
V Total exports (I - IV)	619 498	4 048 707	688 707	4 549 889

Source: Denmark's Fisheries.

Table 103. Danish exports, by countries (1 000 D kr.)

	EEC		Sweden		Switzerland		USA		Eastern Europe		The rest of Europe		Other countries	
	1978	1979	1978	1979	1978	1979	1978	1979	1978	1979	1978	1979	1978	1979
UNPROCESSED PRODUCTS														
I Fish for human consumption														
a) Saltwater fish	702 627	793 842	38 127	37 173	29 178	30 964	7 518	1 175	17 039	18 768	10 976	21 569	5 012	7 033
b) Freshwater fish	375 508	435 076	16 229	14 449	25 633	28 186	2	7		1 056	1 208	11 665	3 346	3 729
c) Crustaceans and molluscs	178 075	235 913	57 291	61 866	1 803	2 613	418	138	1	1	12 501	15 174	1 396	947
I Fish for human consumption in total	1 256 210	1 464 831	111 647	113 488	56 614	61 763	7 938	1 320	18 116	19 977	35 142	48 707	9 754	11 709
II Fish for industrial purposes in total	1 066	1 361	65	-	-	-	-	-		21	150	666	-	-
PROCESSED PRODUCTS														
III Fish for human consumption														
a) Fillets	416 575	646 321	145 231	153 572	40 450	52 515	245 272	140 454	15 054	16 865	50 304	53 579	12 861	9 407
b) Wetsalted, dried and smoked fish	113 117	162 607	10 221	10 537	17 029	23 089	441	254	740	527	30 421	67 007	17 988	9 698
c) Prepared and canned fish	344 093	436 073	100 588	104 434	54 539	49 228	10 328	9 906	751	2 128	26 013	29 300	29 074	28 535
III Fish for human consumption in total	873 785	1 245 001	256 040	268 543	112 018	124 832	256 041	150 614	16 545	19 520	106 738	149 886	59 923	47 640
IV Fish meal and fish oil etc. in total	483 373	440 180	46 467	54 471	129 283	119 785	-	-	46 020	52 604	132 762	98 137	32 926	53 941
V Total exports (I - IV)	2 614 434	3 151 373	414 219	436 502	297 915	306 380	263 979	151 934	80 681	92 122	274 792	297 396	102 603	113 290
Percentage of total exports	64.6	69.2	10.2	9.6	7.4	6.7	6.5	3.3	2.0	2.0	6.8	6.6	2.5	2.6

Source: Denmark's Fisheries.

Table 104. Danish exports of main products, 1979

	Imports		Exports	
	Quantity (tonnes)	Value (Dkr)	Quantity (tonnes)	Value (Dkr)
Herring, fresh cooled or frozen (excl. fillets)	82 274	263 243	68 756	412 430
Flatfish	10 730	73 896	19 551	198 851
Demersal fish	26 247	100 235	46 153	379 448
Other saltwater fish (incl. mackerel)	38 322	84 681	31 391	171 568
Fillets of flatfish	697	7 703	12 658	251 957
Fillets of demersal species	1 545	15 065	44 389	533 365
Anadromos species (salmon, trout, etc.)	5 264	165 186	17 906	370 322

Source: Denmark's Statistics.

Table 105. Greenland: Exports of fish and fish products, 1978 and 1979

	1979		1978	
	Quantity (tonnes)	Value ('000 Dkr)	Quanity (tonnes)	Value ('000 Dkr)
Total fish and fish products	32 526	510 576	23 326	306 526
Fresh, chilled	-	-	457	5 539
Frozen	10 716	145 677	12 080	133 977
of which: frozen fillets	7 292	82 107	8 158	87 308
Salted, dried, smoked	7 872	69 734	2 647	20 028
Shellfish (fresh, chilled, salted, dried, frozen)	9 545	214 482	5 627	109 932
Canned	1 680	63 204	565	30 434
Meal	1 477	3 213	1 578	3 788
Oil	86	141	-	-
Other	1 010	14 125	372	2 828

Source: OECD.

Table 106. Greenland: Exports of fish and fish products, 1978 and 1979 (by country)

	1979		1978	
	Quantity (tonnes)	Value ('000 Dkr)	Quantity (tonnes)	Value ('000 Dkr)
United States	6 640	75 374	7 340	82 090
United Kingdom	648	18 618	-	-
West Germany	527	17 111	-	-
France	763	14 929	-	-
Switzerland	170	8 014	-	1
Sweden	232	5 107	-	-
Denmark	22 329	350 356	15 986	224 435
Others	1 077	21 067	-	-
Total	32 386	510 576	23 326	306 526

Source: OECD.

Table 107. Ireland: External trade in fish and fish products, 1979 and 1980

	Imports				Exports			
	1979		1980		1979		1980	
	Quantity M tonnes product weight	Value IR£	Quantity M tonnes product weight	Value IR£	Quantity M tonnes product weight	Value IR£	Quantity M tonnes product weight	Value IR£
Total fish and fish products	23 226.98	20 087 207	21 950.71	16 146 679	83 975.56	40 806 452	49 233.69	33 225 167
Fresh, chilled	2 820.43	1 297 866	1 019.52	855 604	29 450.37	8 816 610	10 888.02	6 519 089
Frozen	3 848.72	6 999 487	3 662.27	5 944 836	30 139.69	13 311 352	17 124.22	8 841 229
Salted, dried, smoked	1 381.52	1 717 129	1 591.14	1 746 737	12 384.84	8 234 465	10 671.98	7 149 654
Shellfish (fresh, chilled salted, dried)	588.62	1 642 286	284.79	1 046 786	6 663.14	8 356 052	6 092.44	8 973 581
Canned	392.86	512 220	307.43	376 589	2.98	3 999	6.65	7 209
Meal	11 664.62	3 248 740	13 249.20	3 263 632	2 041.10	470 216	1 550.96	342 066
Oil	321.58	158 533	261.29	160 172	2 143.15	391 046	2 124.83	418 383
Others	2 208.63	4 510 946	1 575.07	2 752 323	1 150.29	1 222 712	774.59	973 956

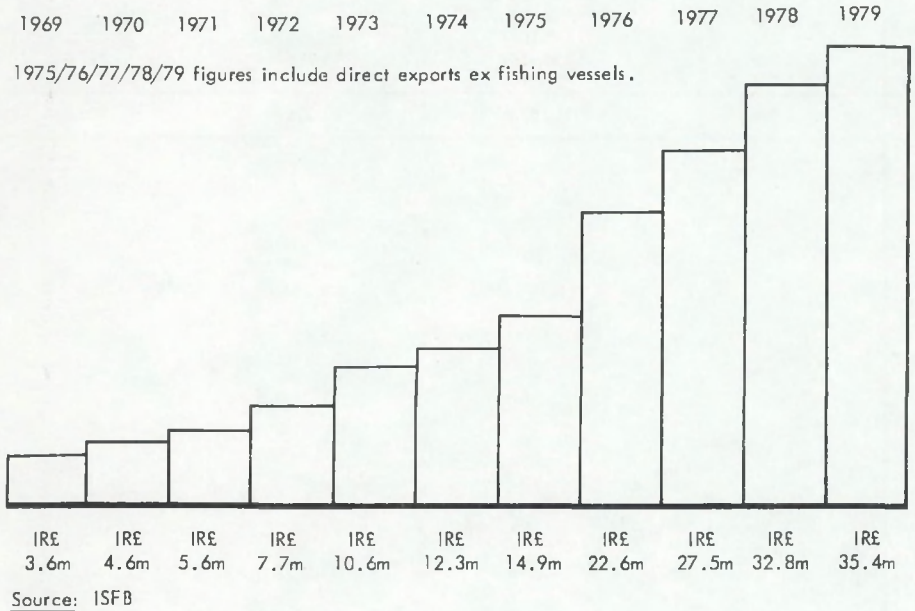
Source: OECD.

Table 108. Irish exports, by destination (IR£ '000)

	1979	1978	1977
Great Britain	9 370	8 057	6 295
Netherlands	6 690	6 194	4 839
France	5 356	4 841	3 500
West Germany	4 735	4 730	3 439
Northern Ireland	1 928	1 657	1 057
Belgium/Luxembourg	1 140	1 332	1 264
Sweden	772	605	795
Spain	462	341	653
Norway	400	342	795
Italy	301	215	18

Source: Irish Sea Fisheries Board

Irish export of fish and fishery products



Source: ISFB

7. DEVELOPMENT OF FISH PROCESSING IN THE EEC

Changing catch patterns of recent years have had a certain effect on sales patterns of fish. While in most countries there have been declines or stagnation of fresh fish consumption, there has been a rapid increase in sales of processed products, sold increasingly with the promotion expertise of the large food concerns and through the supermarket chains, although this latter trend is not apparent in all countries. Processing techniques and the range of products available have improved, and this has worked to the disadvantage of the EEC catching sector, some of whose catch is unsuitable for processing, partly because of the nature of the fish, partly because of poor quality control, and partly because of erratic supplies.

7.1 The processing industry in France

After a worrying period over 1977-79 when French imports of fish reached nearly three times the value of the annual catch, 1980 saw a slight improvement, with some of the change due to better performance from the processing industry. This sector has not only improved supplies to the domestic market but has also boosted its exports of some products, thus combatting the trade deficit in fish and fish products. Output of highly processed menu-type frozen fish products almost doubled in 1980 compared with 1975. This made possible a slight reduction in imports but added 68% to the quantity exported (compared with 1975).

As in other countries this product area has shown tremendous growth over the past two years. This could allow sustained expansion in the processing sector, although some of this is bound to come at the expense of the trade balance in raw materials. In 1980 imports of frozen fillets and blocks were 113% higher than in 1975, much of this being utilised by the processors. (Note: the figures on output in tables 109 and 111 from OECD and FICUR do not necessarily correspond because of differences of definition).

The canning industry has expanded over the last five years, with output rising from 54 011 t in 1975 to 66 231 t in 1980. But the main growth has come in exports which grew by 261% over the same period to 30 965 t in 1980, partly because of a contraction of domestic demand. The last 20 years has seen increased concentration of the industry, and recently overseas investment has grown, especially for tuna canning in West Africa, which has the advantage of proximity to fishing grounds and relatively cheap labour. Around 40% of the French canned tuna market is supplied from canning plants in West Africa.

In both frozen and canned fish sectors it would not be surprising to see increased government spending in coming years, with food exports being regarded as a potential major source of foreign earnings.

Table 109. Development of French processing industry, 1975-80 (tonnes)

	1975	1980	Variation 1975/80
Fish			
Production			
Fillets and blocks, frozen (surgeles)	26 669	21 590	
Fish, frozen (surgeles)	4 966	6 360	
Fish, frozen (congele)	4 828	6 614	
	36 463	34 564	- 5%
Imports			
Fillets and blocks, frozen (surgeles)	18 646	39 760	
Fish, frozen (surgeles)	634	2 213	
Fish, frozen (congele)	11 292	7 498	
	30 572	50 471	+ 65%
Exports			
Fillets and blocks, frozen (surgeles)	3 626	4 654	
Fish, frozen (surgeles)	219	357	
Fish, frozen (congele)	6 050	6 819	+ 13%
Consumption			
Fillets and blocks, frozen (surgeles)	41 689	56 696	
Fish, frozen (surgeles)	5 381	9 216	
Fish, frozen (congele)	13 915	12 304	
	60 985	78 216	+ 28%
Frozen fish preparations for retail			
Production	5 662	11 167	+ 97%
Imports	607	581	- 4%
Exports	133	224	+ 68%
Consumption	6 136	11 524	+ 88%
Frozen fish for canning etc.			
Production	54 011	66 231	+ 23%
Imports	31 002	34 454	+ 11%
Exports	8 568	30 965	+ 261%
Consumption	76 445	69 720	- 9%

Source: FICUR.

Table 110. Activities of the French canning industry, 1979

	Weight of fish (t)	Processed weight (t)		Weight of fish (t)	Processed weight (t)
Sardine:			Mackerel	21 150	19 430
Atlantic	700	630	Miscellaneous	8 700	4 820
Mediterranean	6 300	6 000	of which:		
Tuna:			Scallop	3 000	750
Albacore	5 000	4 350			
Tropical	25 000	19 700			

Source: OECD

Table 111. France: Utilisation of catch, 1979 and 1980.

How marketed	1980		1979	
	Quantity (tonnes)	% of total landings	Quantity (tonnes)	% of total landings
Fresh, chilled	586 810	78.9	560 489	78.5
Frozen	17 083	2.3	14 615	2.0
Salted, dried, smoked	1 265	0.2	1 088	0.2
Canned	99 138	13.4	97 058	13.6
Reduction to meal	2 074	0.3	2 223	0.3
Other	36 920	5.0	38 147	5.3
Total	743 290	100.0	713 620	100.0

Source: OECD.

7.2 The processing industry in West Germany

The German industry can be subdivided into various areas. There is a substantial market for canned and marinaded fish (traditionally herring, e.g. rolmops, Bismark herring), with total supplies in 1979 reaching 134 492 t, of which just over 22 000 t was imported. Prices rose rapidly during the mid and late 70s following shortages of raw material, but imports from Canada and partial substitution of mackerel and pilchard for herring have helped solve this problem to a large extent. However, per capita consumption has dropped back slightly to 2.19 kg in 1979.

Production of smoked fish has fallen slightly over the past five years but the shortfall has been made up by exports. Total availability has hardly changed at around 19 000 - 20 000 t, although the share of herring and sprat in this has declined to less than 4 000 t. Production of fish salad products has fallen by 20% since 1975 to 15 571 t in 1979. Domestic output of shrimp, mollusc and mussel preparations has also fallen back by 27% over the same period to 28 845 t, but a rapid increase in imports has pushed total supplies up by 60% to 42 320 t (raw equivalent).

Major growth in retail sales of deep frozen fish has been followed by a period of stagnation. Sales reached a peak of 54 681 t in 1976, but have levelled in the ensuing years. Sales of breaded fillets have settled at around the 26 000 t mark (fish content minimum 70%), and those of unbreaded fillets at around 11 000 - 12 000 t annually. But there has been some growth in the market for highly processed fish-based products (i.e. menu-type preparations with minimum 70% fish content). Sales have risen from 8 081 t in 1975 to 9 934 t in 1979. Sales of "other" frozen products have also increased (including shellfish and molluscs) from 3 937 t in 1975 to 5 996 t in 1979.

As for the catering/household breakdown, caterers account for about 40% of purchases. Only for highly processed products is there a large deviation from this division, since households account for 85% of purchases of such products.

Per capita consumption of frozen fish has risen from 1.44 kg in 1975 to 1.80 kg in 1979. This is higher than the rate of growth in per capita consumption of fish in general, which has risen from 5.56 kg to 5.9 kg over the 1975-79 period. Some of this growth has been at the expense of fresh fish sales, which have been hit by inferior and irregular landings.

Table 112. Germany: Utilisation of catch, 1979 and 1980

How marketed	1980		1979	
	Quantity (tonnes) catch weight	% of total landings	Quantity (tonnes) catch weight	% of total landings
Fresh, chilled	145.0	51.4	134.2 (1)	45.6
Frozen (2)	117.3	41.5	142.1	48.3
Cured (3)	-	-	-	-
Canned (4)	-	-	-	-
Reduced to meal and/or oil, etc. (5)	(31.0)	-	(30.3)	-
Other (6)	20.0	7.1	18.0	6.1
Total	282.3	100.0	294.3	100.0

(1) Frozen ashore included; (2) Frozen on board only; (3) Salted on board only; (4) Raw material for canned products included in fresh, chilled; (5) Included in frozen; (6) Withdrawal, waste and industrial fish and fodder shrimps (not possible to separate into utilisation for meal and fodder).
Source: OECD

Table 113. Germany: Market sectors for finished products, 1979

Product	Production	Import	Export	Domestic availability
Herring, canned	46 279			
or				
marinaded	72 678	22 077	6 542	134 492
Canned sardine	-	7 506	270	7 236
Canned tuna	-	15 040	294	14 746
Oelpraeserven	10 172	24	1 048	9 148
Anchovies	6 178	531	4	6 705
Salt herring and sprats	3 369	637	13	3 993
Other smoked	11 111	3 895	246	14 760
Fish salads	15 571	-	-	15 571
Shellfish and molluscs	28 845	24 516	11 041	42 320
				- 19 240 (2)
				23 080
Fresh fish (1)	39 747	35 689	7 238	68 198
Frozen fish (1)	68 492	51 962	55 956	64 498
				132 969
				- 28 732 (2)
				+ 2 000 (3)
				+ 4 716
Fresh and frozen				110 680
Total	308 098	178 009	82 791	362 060

(1) Actual fillet weight, i.e. whole fish weight x 0.45; (2) Industrial raw material input; (3) Fresh herring; (4) Stock change.
Source: Germany Ministry of Agriculture

Table 114. Germany: Retail sales of deepfrozen fish, tonnes

	Retail				Catering				Total			
	1976	1977	1978	1979	1976	1977	1978	1979	1976	1977	1978	1979
Fillet:												
unbreaded	8 413	7 352	7 125	6 978	4 483	4 450	4 578	4 607	12 896	11 802	11 703	11 585
breaded	16 181	15 940	15 433	16 942	12 302	11 554	10 181	9 537	28 483	27 494	25 614	26 479
Fish dishes (1)	7 367	7 860	7 965	8 518	1 544	1 436	1 385	1 416	8 911	9 296	9 350	9 934
Other products, including shellfish and molluscs	632	685	747	1 180	3 759	3 636	4 423	4 816	4 391	4 321	5 170	5 996
Total	32 593	31 837	31 270	33 618	22 088	21 076	20 567	20 376	54 681	52 913	51 837	53 994

(1) Fish content 70% +
Source: Deutsches Tiefkuhlinstitut.

7.3 The processing industry in the Netherlands

One striking feature of the frozen fish sector in the Netherlands is the absence of reliable statistical information on trade and production. There have been complaints from the catching sector about this vacuum, which is all the more surprising in a country where other food industries (fruit, vegetables etc) manage to produce comprehensive and up-to-date figures such as are really needed for market management. Large quantities of frozen fish sold in the Netherlands are not processed there but imported from Germany or Belgium or even further afield. The annual consumption of frozen fish products has been put at around 16 000 t (Economist Intelligence Unit estimate), but how much of this is produced in the Netherlands is not clear. In these circumstances figures on employment in fish processing cannot be taken as completely reliable.

Information is more satisfactory for other areas of fish processing. Canned fish, which is in the hands of a relatively small number of processors, accounts for about 15 000 t of raw fish, with final canned production (including semi-preserves but excluding marinated herring) reaching 8 043 t in 1980, down considerably from the performance of 1979. About one-third of production is sold on the domestic market, where average value is higher. Mussels account for about one-half of input by weight to the industry, with herring and mackerel also having an important place. Output of marinated herring is estimated at about 5 000 t, while smoked fish production could be in the region of 16 000 - 17 000 t, with half of this accounted for by mackerel.

Table 115. Netherlands: Utilisation of catch [a], 1979 and 1980

How marketed	1980		1979	
	Quantity (tonnes) landed weight	% of total landings	Quantity (tonnes) landed weight	% of total landings
Fresh, chilled	157 000	50.4	158 650	52.5
Frozen	103 000	34.6	93 500	30.9
Cured (salted, smoked, dried)	31 000	9.9	32 400	10.7
Canned	11 000	3.5	12 800	4.3
Reduced to meal and/or oil etc.	3 500	1.1	2 819	0.9
Other	1 500	0.5	2 112	0.7
Total	312 000	100.0	302 281	100.0

Source: OECD.

Table 116. Raw material purchases, production and sales of Dutch fish canneries [1]

	1980	1979
Raw material		
Fresh herring	451	786
Mackerel	3 040	3 405
Freshwater fish	-	-
Mussels	7 601	10 944
Others	4 102	2 244
Total	15 195	17 378
Total sales	8 043	10 199
Domestic	2 867	3 910
Export	5 176	6 288
Total value	39 592	43 061
Domestic	13 127	14 346
Export	26 465	28 714

1) For canned fish and semi-preserves.
Source: CBS

7.4 The processing industry in Belgium

The amount of fish used for processing in Belgium in recent years has declined to around 17 600 t in 1979 from 23 580 t in 1975 and 27 261 t in 1970. (Total value of fish destined for processing in 1979 was put at BFr930M). Of 1979 raw material, there was 15 100 t fresh and frozen fish, 1 000 t salted fish and 1 500 t shellfish and molluscs.

It is now thought that the decline in production has levelled out. One of the reasons for the decline was that several small and part-time businesses went out of production during the seventies, although their precise level of output is not recorded.

Final production of processed products in 1978 was 14 800 t worth BFr1 600M, consisting of 7 800 t frozen, dried and salted fish, 4 000 t canned fish, shellfish and molluscs and 3 000 t smoked fish. For 1979 some increase in output was expected following rationalisation in some concerns. Moreover, this expansion is expected to continue, both for the domestic and export markets. An increasing part of raw material is now being imported, and to some extent the need to convert plant to deal with different species of fish or different preparations has sparked off this expansion. Total processed output is accounted for by 15 concerns producing fish in brine or salted fish, one canning plant, one producer of dried fish and two producers of deepfrozen fish. State interest rate abatements have been made available for modernisation of the processing sector.

Table 117. Belgium: Utilisation of catches, 1979 and 1980

How marketed	1980		1979	
	Quantity (tonnes) live weight	% of total home landings	Quantity (tonnes) live weight	% of total home landings
Fresh, chilled	30 610	82.46	33 436	87.40
Frozen	3 050	8.22	2 678	7.00
Cured (salted, dried, smoked)	-	-	-	-
Canned	610	1.64	574	1.50
Reduced to meal and/or oil, etc.	2 440	6.57	1 170	3.06
Others	415	1.11	398	1.04
Total fish and fish products	37 125	100.00	38 256	100.00

Source: OECD.

Table 118. Belgian processing compared with total fish supplies, 1970-78

	Landings in Belgium	Imports	Exports	Total available	Used for processing	
					T	as % of
1970	43 872	80 174	29 830	94 216	26 881	28.53
1971	48 229	73 959	29 949	92 239	27 455	29.77
1972	45 118	71 345	27 285	89 178	22 105	24.79
1973	39 337	69 758	25 897	83 198	22 524	27.07
1974	35 238	71 091	21 688	84 641	22 824	26.97
1975	32 626	58 898	18 666	73 858	18 944	25.65
1976	32 841	71 132	20 683	83 290	19 893	23.88
1977	31 325	64 445	18 545	77 225	16 029	20.76
1978	35 348	61 653	19 894	77 107	-	-

Source: INS.

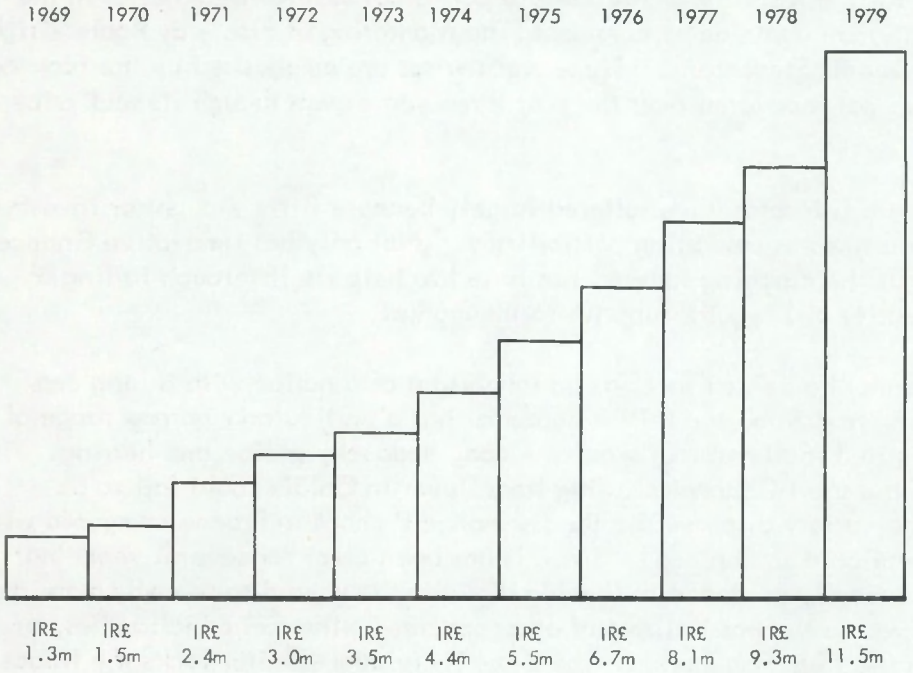
7.5 The processing industry in Ireland

There was intensive investment in the 1970s in the Irish processing sector, rising from I£ 1.5M in 1970 to I£ 11.5M in 1979. The number of companies involved in processing and distribution has now risen to over 50. Recent additions are a canning plant at Donegal and an industrial complex at Killybegs providing facilities ranging from fishmeal production to consumer frozen food production.

The Irish Sea Fisheries Board has provided considerable investment aid for the processing sector, in particular for companies with development programmes aimed at expanding from primary processing to final processing, thus improving the value added element. This is particularly important for the country's export trade in fish products, which has grown from 0.3% of GDP in 1970 to 0.5% in 1979.

With the decline of the herring fishery, there has also been emphasis on better processing and handling of other species. These include mackerel but also lesser known species such as hake and megrim (a kind of small flatfish also known as West Coast sole). In 1980, 35.9% of Irish fish was marketed frozen, 16.12% cured, 10.43% reduced to meal and 35.08% fresh.

Investment in Irish shore based fish processing industry



Source: ISFB

Table 119. Ireland: Utilisation of catch, 1979 and 1980

How marketed	1980 Quantity '000 tonnes	1980 %	1979 Quantity '000 tonnes	1979 %
Fresh, chilled	50.62[a]	35.08	20.11	22.12
Frozen	51.81	35.90	31.62	34.79
Cured (salted, smoked, dried)	23.26	16.12	31.13	23.25
Canned	*	*	*	*
Reduced to meal and oil	15.04	10.43	10.20	11.22
Other	3.57	2.47	8.62	7.84
Total	144.30	100.00	90.90	100.00

(a) Includes large quantities of fish sold to offshore factory ships. * not available.
Source: OECD.

7.6 The processing industry in the United Kingdom

The last three years have seen a decline in UK supplies of frozen fish, with domestic production falling from a peak of 128 667 t in 1977 to 111 189 t in 1980. At the same time imports of frozen fish ready for sale also fell from their 1977 level of 21 168 t to 17 960 t in 1980, although they reached their peak of 23 679 t much earlier, in 1972.

Much of the cutback over the past three years has been due to reduced demand from the catering sector, which in 1979 took only 63 193 t (51% of total sales) compared with 81 154 t in 1975 and 72 731 t in 1977.

As far as exports are concerned, over 80% of frozen white fish sales are catering packs. Exports appear to have settled at around the 10 000 - 11 000 t mark, although they were higher at the beginning of the decade. The strength of the pound in the period since 1979 is likely to have made life more difficult for exporters.

Price rises in the mid 70s generally have been seen as the reason for the decline in sales, but more recently the marketing of fish has come in for harsh criticism. A report prepared for the Ministry of Agriculture points out several weaknesses in the marketing chain, from quayside to consumer (The Marketing of Fish - by Robin Wright, John Cross and Dennis Stevenson). These weaknesses are emphasised by the fact that sales of fish have not recovered over the past three years even though its real price has fallen.

In particular, fresh fish sales have suffered largely because little thought or investment has been directed towards marketing possibilities. Not only has innovative finance been lacking, but the catching industry has failed to help itself through failing to ensure better quality and regular supplies to the market.

Certainly, it cannot be denied that, as an inhabitant of a nation with a long and significant fishing tradition, the British consumer has a particularly narrow range of consumption, limited really to four species - cod, haddock, plaice and herring. No one making the short Channel crossing from Dover to Calais could fail to be astonished by the variety displayed in the fishmongers' shops in France compared with limited range available in England. Since it has been clear for several years that supplies of domestically produced cod would diminish, it is hard to see why more thought has not been given to the possibilities of other species. The main decline has, of course, been in the fresh fish market, where the individual retailer lacks the finace to launch into sales of new species. For processed frozen products the trend has been somewhat different, as the table below shows.

Table 120. United Kingdom: Utilisation of catch, 1979 and 1980

How marketed	1980*		1979	
	Quantity '000 tonnes landed weight	% of total landings	Quantity '000 tonnes landed weight	% of total landings
Fresh	363	45.9	407	48.7
Frozen	297	37.5	337	40.3
Cured (salted, smoked, dried)	10	1.3	11	1.3
Canned	15	1.9	18	2.2
Reduced to meal and/or oil	95	12.0	57	6.8
Other	11	1.4	6	0.7
Total	791	100.0	836	100.0

* Estimated.
Source: OECD

Table 121. United Kingdom: Consumer frozen fish market sizes (Ton)

	1977	1978	1979	1980
Fillets and steaks, natural and breaded	35 400	40 100 + 13%	40 900 + 2%	43 070 + 5%
Battered fish	8 500	9 900 + 17%	11 800 + 19%	11 650 - 1%
Fish fingers	39 600	35 500 - 10%	36 100 + 2%	36 500 + 1%
Fish in sauce	7 500	8 700 + 16%	9 000 + 3.5%	9 600 + 6.5%
Fish cakes	9 600	9 800 + 2%	9 000 - 8%	9 100 + 1%
Speciality fish	2 500	2 900 + 16%	3 400 + 17%	4 400 + 29%

Source: Independent Audit, quoted by Ross Foods Limited.

7.7 The processing industry in Denmark

Danish fish and fish products exports as a whole have increased by approximately 20% per year since 1978 and processed products have benefited from this expansion in trade. The majority of the plants process cod, plaice and herring into fillets and other processed products, but the canning industry is also a rather large sector, processing mainly herring, mussels and cod roe as well as shrimp, sprat and marinated herring. The expansion in the last few years has been made possible by imports of raw materials owing to the restricted opportunities for fishing by the Danish fleet. There is, however, also a growing trade in salmon, shrimp and other high-value species.

Table 122. Main markets for Danish export of fishproducts

	1977		1980	
	Million Dkr	%	Million Dkr	%
West Germany	772.5	27.8		28.4
France	320	11.5	587	13.1
Belgium	159	5.8	302	6.7
The Netherlands	145	5.2	255	5.7
Italy	152	5.5	359	8.0
Great Britain	182	6.6	553	12.3
The EEC	1 733	62	3 329	74
USA/Canada	331	12	73	1.6
Total	2 773		4 487	

Source: Danish fishprocessors and exporters' association (DFE).

Table 123. Export of fish and fishproducts

	1978		1979		1980	
	'000 tons	Million Dkr	'000 tons	Million Dkr	'000 tons	Million Dkr
Fish for human consumption						
Fresh fish	147	1 495	169	1 722	172	2 018
Processed fish	135	1 681	158	2 007	176	2 481
Total consumption	282	3 178	327	3 729	348	4 499
Fish meal and oil	335	871	358	819	422	1 161
Industrial species	2	1	4	2	7	5
Total export	619	4 049	689	4 550	787	5 664

Source: Danish fishprocessors and exporters' association (DFE)

8. STRUCTURAL IMBALANCE AND STRUCTURAL POLICY

There is little doubt that there is a serious case of overcapacity in the European fishing fleet, but whether a structural policy can realistically be based on commercial criteria alone is not certain. The employment aspect has become of particular political importance in some regions of certain member states, and is bound to be taken into consideration when negotiating a structural policy. In fact, "structural policy" is itself something of a misnomer - the final policy is likely to be more of a socio-structural policy, not unlike EEC structural measures in the farming sector.

It has already been seen how different from each other the EEC fleets are, and the following brief account of their development in recent years adds to that. National approaches to rationalisation of the fleet have varied in method and degree of success, and it is even difficult to find a reliable yardstick by which to measure success or failure in this context. If 1970 is taken as a starting point there is very little common ground, since operations were much more diversified before the introduction of 200-mile zones. However, it is valid to see how the various fleets have adjusted to the new situation, and which have achieved greatest success on a number of criteria. Table 125 gives some key data.

Fish prices should be kept low

If in the long run the industry is to become competitive and not have its livelihood constantly threatened by imported fish which could and should be supplied by the Community fishing fleet one main priority is to keep prices as low as possible. Currency fluctuations make any direct comparison between the member states unreliable, but one possible indicator could be national prices indices for fish (see table 126). For foodfish, the Netherlands has remained ahead of the others - between 1970 and 1979 Dutch fish prices rose by only 49% (although in 1976 they were briefly 72% higher).

Effect of inflation

Only two other countries - Germany and Denmark - have managed to keep the increase below 100%, while the UK average price has risen by 291%, according to the EEC Commission. This does not mean, however, that British fish is outrageously expensive compared with prices in the rest of the EEC; rather it shows that fish in the UK was very cheap in 1970 when distant water fishing grounds provided a significant quantity of cheap staple species. At the same time savage inflation in the UK has had a dramatic effect, and it is no surprise that in Italy too, which has a similar problem, prices have shot up by 279%.

The oil price crises of the 1970s are also reflected in the price trends of most countries. If inflation in the UK is offset against inflation rates in other countries the level of price increase is not greatly different from that in other countries which have lost distant water fishing grounds (Germany, Belgium and France). The extent of individual national losses and the subsequent differing impacts of imported fish do not make the calculation any easier. Moreover, taking 1975 as a base year, the index of average export prices of the main exporters to the EEC has been within the range of indices for EEC first-hand prices.

Netherlands in favourable position

However, despite all these variables it should be possible to draw some comparisons on the basis of the data set out in table125. The calculation is easiest for those countries which have not suffered third country losses and therefore have not found themselves burdened with an unusable fleet. The Netherlands is the main example here. Vessel numbers have been cut back, engine power per vessel has been improved dramatically, crew numbers have been cut back thanks to investment; not only has the catch increased in tonnage terms, but average catch per GRT and per fisherman has improved. The uprating of vessels appears to have paid off. Almost the entire Dutch catch is taken inside the EEC zone.

Poor Belgian performance

Despite its third country losses Belgium too could have perhaps been in a similar position today if there had been in recent years the kind of investment that was carried out there in the 1960s. As it is, however, Belgian performance remains among the worst in the north European member states, and there are clear indications of overcapacity - overmanning, underpowered vessels and poor yield.

Need for improved efficiency in Ireland

Ireland, as has been noted, is an exceptional case. One of the aims of the Fisheries Development Programme has been not only to exploit an available resource but also to create employment. In these terms it is understandable that catch per vessel has in fact declined (although the collapse of herring stocks plays a large role here also). Numbers of fishermen in Ireland have increased rapidly in the last ten years, with the result that catch per fisherman has also declined. The need for efficiency as well as social stability and improvement of employment prospects now seems to have been recognised in Ireland - hitherto almost the entire fleet was below 50 GRT, but in the last couple of years there has been greater interest in larger, more efficient vessels, which are able to take advantage of facilities in some Irish ports which have been rapidly modernised in recent times. Such vessels might be able to slow down the inflation in fish prices since 1970.

Stable Danish prices

As far as Denmark is concerned, overall figures would suggest a rapid improvement in the efficiency of the fleet over the past 10 years. However, the figures disguise the fact that much of the apparent improvement has come through the scrapping of the smallest vessels and the uprating of larger vessels, especially those involved in fishing for pelagic fish for reduction to meal. Thus the fleet is not quite so efficient as would appear at first sight, but nevertheless fish prices have been kept fairly stable over the 1970-79 period.

One reason for this is that Denmark enjoys easy access to the fisheries of the Skagerrak and Kattegat. Baltic cod and herring, to name but two species, can be easily fished by quite small vessels which would be unsuitable formaking longer journeys. About one-third of Danish catches come from these relatively "local" fisheries, with the remainder being taken largely from the North Sea. However, overfishing and pollution have put Baltic fisheries under stress.

Despite distortions in the figures, there has been in the last three or four years a trend similar to that in the Netherlands, with medium-sized vessels being uprated in terms of engine power. This too has contributed to a low rate of inflation in fish prices, which is all the more surprising since the country in recent years has been battling with severe inflation on all fronts. Recent years have also seen help from the government with restructuring plans. These will be looked at in another chapter.

Over-manning in Germany

This brings us to the fishing fleets of the big three - Germany, France and the United Kingdom. Figures for Germany are very misleading, as a change in registering procedure occurred in 1976 - this accounts for some distortions in table 125.

Germany's losses from third country waters have been huge (see section on catch development), but this has not automatically sparked off interest in the smallest boats. In fact the number of boats under 50 GRT has been cut back, so that vessels in the 50 - 150 GRT classes have become relatively more important. This, however, has failed to overcome an obvious problem of overmanning (although one suspects that the data on fishermen might also include the considerable numbers laid off because distant water vessels are laid up). Catches from the North Sea and adjacent areas have, however, been improved. Due partly to new vessels in a much larger size grouping (500 - 1 000 GRT) catches have been improved in semi-distant waters, such as the Norwegian Sea, the southern coast of Ireland and Spitzbergen. But a good deal of restructuring still needs to be carried out in the German fleet. From the figures in table 125 it seems that the German vessels still are underpowered when compared to some other countries in the EEC.

Obsolescence in French trawler fleet

As far as France is concerned, the predominant feature, especially in social terms, is the huge artisanal fleet. There is little likelihood of any immediate major changes coming in that sector, mainly for socio-political reasons. But there is considerable room for change in the trawler fleet (peche hauturiere); the fuel prices crises have highlighted the degree of inefficiency and obsolescence which characterises this sector of the French fleet. Overmanning has long been a serious problem, and one of the main factors behind the strike of 1980.

It might be argued that if the problem of overmanning had been tackled when it was first recognised instead of letting the problem grow to crisis proportions the strike, along with ensuing losses for the owners, might never have occurred. The other main problem area for this sector is its need to improve the quality of its catch to recoup some of the ground it has lost to the inshore fleet. There is a desperate need to install onboard freezer capacity and to rejuvenate the ageing fleet in general to bring it into line with market requirements.

Reducing dependence on imports

The catch potential and efficiency of this sector could perhaps be improved more rapidly and with more far-reaching effect than is the case for the artisanal fleet (although there is need for improvement there also), and could help to reduce France's growing dependence on imports. The distant water fleet will also have to be modernised

if fisheries potential in the Indian Ocean and other areas now under scrutiny is to become economically viable.

UK restructuring proposals

In the UK proposals put to the British government in 1979 (but on which no concerted action has yet been taken) by the White Fish Authority outlined the structural overcapacity sector by sector, and suggested remedies and probable necessary expenditure.

Although it is just possible that the UK will be allocated a slightly better share of the total EEC catch than that upon which the WFA based its projected fleet requirements, table 124(below) from the WFA proposals does give an idea of the degree of restructuring needed. It should also be recognised that the inshore fleet has increased in numbers since the proposals were drafted. The distant water fleet had, however, declined by the end of 1980 to 20 freshers and 30 freezers. This saving in the cost of restructuring might at least offset the inflation-induced increase in unit laying-up and scrapping premiums which will be needed, since it is now three years since the proposals were put together.

Table 124. UK: Projected fleet requirements (White-Fish Authority)

Length group (ft)	40 - 80'	80 - 110'	110 - 140'	140' + Freshers	140' + Freezers
Present number of vessels	1 903	112	116	49	34
Vessels after restructuring	1 453	71	87	28	19
Excess capacity	450	41	29	21	15

Note: Vessels under 40' (10m) have been excluded from the calculation because they contribute a relatively minor proportion of the total UK catch.

Table 125. EEC fleet, GRT, HP, fishermen and various inter-relationships

	Fleet GRT*		Vessels		'000 Horsepower		Crew '000		Tonne fish/crew	
	1970	1979	1970	1979	1970	1979	1970	1979	1970	1979
Germany	150	119	1 788	713	363	347 1)	6.7	4.4	91.5	80.9
Belgium	32	20	332	205	101	80 1)	1.6	1.3 1)	33.4	36.2
Denmark	120	142	7 578	7 200	525	772 2)	15.5	14.9 1)	79.1	116.3
France	283	198	13 430	11 118	1 052	1 221 1)	35.8	24.0 2)	21.8	32.0
Ireland	17	32	932	1 535	n.a.	122 1)	5.9	8.5 3)	13.4	10.9
Italy	240	257	19 774	21 996	949	1 262 2)	62.0	62.1	6.4	6.9
Netherlands	90	86	1 294	908	368	450 2)	5.5	3.4 2)	54.7	98.4
UK	291	208	5 923	7 228	817	971 2)	21.7	22.2	51.3	41.8

	Tonne fish/GRT		Tonne fish/HP		HP/GRT		Crew/vessel		GRT/vessel	
	1970	1979	1970	1979	1970	1979	1970	1979	1970	1979
Germany	4.1	3.0	1.69	1.03	2.42	2.92	3.8	6.2	83.9	166.9
Belgium	1.7	2.4	0.53	0.59	3.16	4.00	4.8	6.3	96.4	97.6
Denmark	10.2	12.2	2.34	1.79	4.38	5.44	2.1	2.1	15.8	19.7
France	2.8	3.9	0.74	0.63	3.72	6.17	2.7	2.2	21.1	17.8
Ireland	4.6	2.9	n.a.	0.76	n.a.	3.81	6.3	5.5	18.2	20.8
Italy	1.7	1.7	0.42	0.34	3.95	4.91	3.1	2.8	24.6	11.7
Netherlands	3.3	3.9	0.82	0.74	4.09	5.23	4.3	3.7	69.6	94.7
UK	3.8	4.5	1.36	0.96	2.81	4.67	3.6	3.1	49.1	28.8

Notes: * '000 GRT; 1) 1977; 2) 1978; 3) 1976.

Table 126. Average price of fish at landings in the EEC*

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
(1) Germany DM/t	825.5	1 003.1	1 097.8	1 290.2	1 514.2	1 375.2	1 455	1 569	1 454.4	1 617
(2) Belgium BF/t	19 983	20 116	21 799	28 159	31 425	32 768	38 827	40 449	41 347	45 470
(3) Denmark DKR/t	2 081	2 186	2 375	3 053	3 354	3 087	3 462	4 240	3 913	3 756
(4) France FF/t	2 442	2 549	2 859	3 182	3 797	3 810	4 207	4 693	4 945	5 264
(5) Ireland I£/t	50.5	58.4	61.5	87.1	103.2	119.8	172.7	235.2	234.4	322.8
(6) Italy 1 000 L/t	358	382	438	460	536	664	774	1 105	1 206	1 359
(7) Netherlands Fl/t	1 081	1 094	1 156	1 393	1 491	1 537	1 861	1 681	1 441	1 607
(8) UK £/t	78.2	94.9	114	150.1	158.5	174.2	224.9	274.6	266.3	305.8
(9)										
(10) Index Germany	100	122	133	156	183	167	176	190	176	196
(11) Index Belgium	100	100.7	109.1	140.9	157.3	164.0	194.3	202.4	206.9	227.5
(12) Index Denmark	100	105	114.1	146.7	161.2	148.3	166.4	203.7	188	180.5
(13) Index France	100	104.4	117.1	130.3	155.5	156	172.3	192.2	202.5	215.6
(14) Index Ireland	100	115.6	121.8	172.5	204.3	237.2	342	465.7	464.1	639.2
(15) Index Italy	100	107	122	128	150	185	216	309	337	379
(16) Index Netherlands	100	101	107	129	138	142	172	156	133	149
(17) Index UK	100	121.4	145.7	192.1	202.6	222.1	287.6	351.1	340.5	391

* Remark: Human consumption only.
Source: EEC Commission.

9. NATIONAL ACTION ON THE STRUCTURAL PROBLEM

To determine exactly how much aid has been given to EEC fleets by national governments in recent years is not an easy task. Indeed, at the time of writing, the EEC Commission after more than a year's research had not succeeded in finalising an inventory of national aids and subsidies. Overt aids are fairly easy to catalogue (although the Commission has not always been informed of these as it should have been) and likewise fairly easy to fault. On the other hand there are various allowances in the taxation area which have proven relatively difficult to quantify. In addition, there have, in the Netherlands for example, been investment subsidies under general provisions for agriculture and fisheries (in this case the WIR law) which complicate affairs.

Some aids given by member state governments have clearly contravened EEC competition law, but so far little has been done to take these governments to the European Court. With some justification, the Commission has taken the view that negotiations on the CFP would be made even more difficult if four or five member state governments were taken to court over national measures. But, given recent lack of progress in the Council, this point of view is now losing support in the Commission.

"Hidden" subsidies not shown in Parliament report

A European Parliament report of 1980 gave some indication of EEC government spending on fisheries in 1978-79, but the figures failed to include 'hidden' subsidies. Nevertheless, the tables below (reproduced from that report) give some idea of the diversity of spending, which in itself is a reflection of the diversity of the structural problem in the Community, adding strength to the argument that a policy of coordination of national restructuring programmes plus a specific EEC regional and/or sectional structural policy would perhaps be more effective than an across-the-board structural policy.

Table 127. National fisheries budgets in EEC countries, 1978, 1979

GERMANY (m ECU)

	1979 (appropri-ations)	1978 (appropri-ations)
A - FISHERIES		
Operating costs, fishery protection vessels	3.235	3.027
Operating costs, fishery research vessels	3.380	2.980
Maintenance costs, fishery protection vessels	1.190	1.165
Maintenance costs, fishery research vessels	1.450	1.780
Cost of chartering a trawler to investigate new fishing grounds	0.875	-
Chartering of fishing vessels to investigate new inshore, near or middle water fishing grounds	0.032	0.023
Interest subsidies for fishery promotion	1.790	1.690
Subsidy for exploring new fishing grounds	2.385	-
Building and conversion of fishery protection vessels	3.975	0.039
Building and conversion of fishery research vessels	0.190	0.043
Procurement of equipment for fishery protection vessels, fishery research vessels, and chartered fishing vessels	0.109	0.195
Loans for inshore, near and middle water fishing	1.790	1.590
Subsidies for building new deep-sea fishing vessels	-	-
Aid for restructuring and strengthening the fishing industry	1.750	1.590
Aid for marketing fish (Art.6, Fishery Products Act)	-	-
SUBTOTAL A	22.151	14.127

	1979 (appropri-ations)	1978 (appropri-ations)
B - IMMEDIATE ACTION TO ADAPT INSHORE AND DEEP-SEA FISHING CAPACITY		
Subsidies for the reorganisation of deep-sea fishing	6.758	4.929
Subsidies for the reorganisation of inshore, middle and near-water fishing	0.159	0.834
Premiums for reducing deep-sea fishing capacity	2.067	1.272
Premiums for reducing inshore, near and middle-water fishing capacity	0.675	0.556
Laying-up premiums for the temporary reduction of deep-sea fishing capacity	0.437	0.437
Laying-up premiums for the temporary reduction of inshore, near and middle-water fishing capacity	0.079	0.795
Publicity campaign to encourage the consumption of unfamiliar species of fish	2.584	2.305
SUBTOTAL B	12.759	11.128
SUM TOTAL NATIONAL AID (A + B)	43.910	25.255

DENMARK (m EUA)

	1980	
CENTRAL ADMINISTRATION		
The Department		
Operating costs	1.325	
Revenue	0.082	
Subsidies	0.236	
Distribution of revenue from fines L (Law) 195 1965 and L 66 1965		0.012
The International Baltic Sea Fishery Commission		0.004
Aid for fishery based on fishing ports on West Jutland's north coast		0.002
Salary for a fish farming adviser		0.013
International Council for the Exploration of the Sea		0.034
International Whaling Commission		0.016
Salary for a business consultant		0.013
Faroes fishery laboratory		0.046
Stocking with salmon fry		0.091
Fisheries attaches		
Current expenditure	0.205	
Temporary committees and commissions		
Current expenditure	0.003	
FISHERIES RESEARCH		
Danish Fishery and Marine Research		
Operating costs	1.595	
Revenues	0.007	
Subsidy	0.006	
Ministry of Fisheries Research Laboratory		
Operating costs	0.451	
Revenue	0.0004	
SURVEILLANCE AND INSPECTION		
Fisheries Surveillance		
Operating costs	1.891	
Revenue	0.003	
Ministry of Fisheries - Industrial Inspectorate		
Operating costs	0.257	
Revenue	0.066	
MINISTRY OF FISHERIES VESSELS		
Ministry of Fisheries vessels		
Operating costs	2.757	
Revenue	0.002	
FISHERIES SUBSIDIES		
Expenditure under L (Act) 124 1978		
Revenue	0.636	
Subsidies	1.687	
From EAGGF		0.636
Structural measures		1.051
Expenditure under L 270		
Subsidies	0.356	
Interest subsidies to commercial fishermen		0.356
Expenditure under L 113 1978		
Subsidies	0.191	
Fishery advisory service		0.191

	1980	
Expenditure under supplementary estimates 1977/78, I (Employment promotions etc.)		
Subsidies	0.636	
Experimental Fisheries		0.636
Expenditure under supplementary estimates 1977/78, I (Employment promition, etc.)		
Subsidies	0.063	
Fishing industry advisory service		0.063
Expenditure under L 177 1979		
Subsidies	2.344	
Structural improvements, etc. within the fishing industry		2.344
EEC temporary subsidies for reorganising the fishing industry		
Revenue	0.025	
Subsidies	0.025	
Subsidies from the EEC Agricultural Fund		0.025
Expenditure on Norway pout fishing		
Subsidies	2.928	
Subsidies to Norway pout fishermen		1.928
APPROPRIATIONS FOR PLANT AND LOANS		
Central Administration		
Capital expenditure	1.910	
New marine research vessel	1.910	
Inspection and Surveillance		
Capital expenditure		
Extension of the Esbjerg fishery inspectorate building	0.025	
Acquisition of property, etc.	0.000	
Mortgage repayments	0.000	
Fisheries subsidies		
Loans		
Claims taken over for short-term loans to fishing-vessel owners	0.063	
Claims taken over for short-term loans to undertakings in the fish food sector	0.000	

	Op. Exp. (+)	Revenue (-)	Subsidies (+)	Capital Exp. (+)	Acquisition of property (+)	Loans (+)	Net Total
Central administration	1.533	0.082	0.236	-	-	-	1.687
Fisheries research	2.047	0.003	0.006	-	-	-	2.045
Inspection and surveillance	2.148	0.069	-	-	-	-	2.079
Ministry of Fisheries vessels	2.757	0.002	-	-	-	-	2.755
Fisheries subsidies	-	0.662	8.234	-	-	-	7.572
Capital and Loan Appropriations	-	-	-	1.935	0.000	0.064	1.999
	8.485	0.823	8.476	1.935	0.000	0.064	18.137

IRELAND (in EUA)

	1980	1979
GENERAL ADMINISTRATION		
Salaries, wages and allowances	1 755 970	1 256 716
Consultancy services	14.9	14.9
Travelling and incidental expenses	314 627	343 283
Post office services	62 686	52 239
SEA FISHERIES		
Sea fisheries development	261 194	216 417
Fisheries school	14.9	14.9
Main fishery harbour works, including payments to the fishery harbour centres fund	4 477 612	2 611 940
Fishery Harbour Centres Fund - grants under Fishery Harbour Centres Act, 1968	29 850	49 254
Miscellaneous marine schemes	7 462	21 492
Construction of exploratory fishing vessels	1 119 402	1 770 283
An Bord Iascaigh Mhara - Administration and current development (Grant-in-aid)	5 612 686	4 780 597
An Bord Iascaigh Mhara - Capital development (Grant-in-aid)	7 462 686	8 955 224
Repayment of advances	298 507	298 507
TOTAL SEA FISHERIES	21 402 711.8	20 355 981.8
INLAND FISHERIES	3 741 671	3 691 791
- of which the Salmon Research Trust of Ireland Incorporated (Grant-in-aid)	59 700	18 657

ITALY (m ECU)

	1980
I - OPERATING COSTS	
- Goods and services	1.013
- Transfers	0.236
II - CAPITAL EXPENDITURE	
- Movable property, technical and scientific machinery and equipment directly chargeable to the State	0.001
- Transfers	1.103
- Loans and advances to further production	token entry
III - OTHER EXPENDITURE	
- Amendment to law No. 388 of August 2, 1975, on provisions for producer organisations in the fishing industry	0.128
- Development of sea fisheries	17.105
TOTAL	19.586

UNITED KINGDOM (m ECU)

A - SUPPORT FOR THE FISHING INDUSTRY (MINISTRY OF AGRICULTURE, FISHERIES AND FOOD)	1979/80	1978/79
Assistance to the fishing industry		12.16
White Fish Authority: equipment loans		4.35
White Fish Authority: equipment grants		7.52
Shell-fisheries: grants for cleansing and re-stocking		-
Temporary aid for the trawling industry		-
Grants to producer organizations		0.02
White Fish Authority: loans to processors, cooperatives etc.		0.03
Grant in aid of the White Fish Marketing Fund		-
Loans to harbour authorities		-
Grants to harbour authorities		0.24
Research and Development		4.06
Fisheries research and development: current expenditure		2.61
Fisheries research and development: Capital expenditure		0.65
Research and development grants to the White Fish Authority		0.80
Administration, protective and other services		11.69
Administrative expenditure		8.35
Sea fisheries protection		3.26
Subscriptions, etc. to international organizations		0.08
TOTAL A		27.91

B - FISHERIES (SCOTLAND) AND HERRING INDUSTRY	1979/80	1978/79
Assistance to the fishing industry		3.11
Herring Industry Board: equipment loans		0.27
Herring Industry Board: equipment grants		1.38
Grants to producer organizations		0.02
Herring Industry Board: loans to processors		-
Grant in aid of the Herring Marketing Fund (United Kingdom)		-
Loans to harbour authorities		0.07
Grants to harbour authorities		1.37
Agency payments on behalf of the EEC Commission		-
Research and development		2.04
Fisheries research and development (Scotland)		2.01
Freshwater fisheries (Scotland) - grants		-
Herring Industry Board: development grants		0.03
Protective and other services		4.96
Sea fisheries protection: capital expenditure		0.33
Fishery protection: current expenditure		4.54
Sea culling		0.04
Minor lights		0.01
Dredging		0.02
Herring Industry Board		0.02
TOTAL B		10.11

Summary	
Assistance to the fishing industry	15.27
Research and development	6.10
Administration, protective and other services	16.65
Overall expenditure for the United Kingdom	38.02

BELGIUM (m ECU)

	1980 (appropriations)
Procurement of special equipment	0.002
Premiums for owners to keep records of fishing yields	0.009
Grants to resolve the manning problem in the fishing industry	0.173
TOTAL	0.184

FRANCE (Payment appropriations) (m ECU)

	1980 (appropriations)	1979 (appropriations)
Operating expenditure	0.76	0.61
Sea Fisheries and Aquaculture - Subsidies	15.66	13.62
Aid to fishermen's and maritime co-operation organisations	0.04	0.15
Modernisation and development of fishing and aquaculture undertakings	0.38	0.21
Seafood processing and marketing	6.24	4.26
Pollution caused by the Amoco Cadiz casualty	token entry	token entry
Sea Fishery and Aquaculture - Research	0.16	0.56
Sea Fisheries and Aquaculture - Investment subsidies	8.44	4.60
Modernisation and development of fishing and aquaculture undertakings	7.72	-
Organisation of markets : seafood processing and marketing	0.72	-
TOTAL	25.02	19.39

EEC NATIONAL GOVERNMENTS FISHERIES BUDGETS (m EUA)

Summary	Germany		Belgium		Denmark		France		Ireland		Italy		Netherlands		UK	
	1980	1979	1980	1979	1980	1979	1980	1979	1980	1979	1980	1979	1980	1979	1980	1979
Total expenditure		35	0.184		18.960		25.02	19.39		18.02	19.586					38
Expenditure on fisheries operations (1)																
Fisheries					12.186										15.24(2)	
Processing & marketing																0.3
Fish promotion		2.6														
Research & development					4.601			0.16								6.1
Protection & surveillance		8.4			2.173					2.23						8.1

Notes: (1) Includes all operational and related expenditure, including subsidies for construction and modernising vessels, grants to producers groups, aid to fish farming and subsidies for ports and other installations. (2) Scotland 3.11M.

The data in the tables above does not necessarily correspond with figures given in the following text, which is based partially on OECD information on national financing.

9.1 Belgium

Aids in Belgium have aimed at both modernising the fleet and reducing overmanning, although the funds available have been modest. Aids in the vessel area have included scrapping grants, subsidies for installation of new gear and equipment, interest rebates for construction of new vessels, and general modernisation aids. There has also been spending on experimental fishing and payments to encourage owners to keep accounts and records. However, much more substantial spending is needed if the serious problem of obsolescence is to be overcome.

9.2 West Germany

Following the introduction of 200-mile zones in its main distant water fisheries Germany was quick to establish a short term programme to adjust fisheries capacity. Grants, laying-up and withdrawal premiums have been the main elements of the programme. As far as the distant water fleet is concerned the main task has been to accelerate reduction of capacity and modernise the remaining vessels to deal with new fishing conditions (e.g. the mackerel fishery). For the smaller vessels a main priority became the uprating of capacity. In 1977 a special action plan to adjust capacity over three years was adopted, with funds spent under the scheme eventually totalling DM 115M. This scheme covered laying-up subsidies, scrapping subsidies (especially for the distant water and Baltic fleets), subsidies for exploration of new species and new fishing grounds and an allocation for promotion of these new species. A further DM 35M was approved for further similar measures in spring of 1980.

9.3 Denmark

In Denmark, the measures adopted in recent years have varied somewhat from the guidelines set down by the EEC Commission for restructuring schemes (which suggested that temporary laying up subsidies should not be applied to vessels under 50 GRT or 18 metres and scrapping or withdrawal premiums should not be applied to vessels under 25 GRT or 12 metres). The Danes have given laying-up premiums to vessels upwards of 5 GRT. In addition, the government has approved interest rate subsidies to enable modernisation to continue.

9.4 The Netherlands

Government spending on fishing in the Netherlands in 1979 totalled HFL 11M, of which HFL 3.5M was for scrapping of trawlers over 15 years old and HFL 4.9M for experimental fishing. Other areas covered by government spending include processing of fish, both on land and at sea, and improvements in the shrimp fishery. As mentioned elsewhere, there have also been investment incentives under the WIR law for agriculture and fisheries.

9.5 Italy

Italy has a long-standing Act (Working Capital Fund in the Fisheries Sector) under which fishing enterprises, whether individual or in partnership, can obtain low interest (3%) loans up to not more than 70% of the investment (maximum repayment period: 15 years for the building of a vessel, and 25 years for construction of shore installations).

In 1979 24 loans were granted totalling L 2 395 000 000 (including L 843 268 000 for the construction of shore installations for the preparation, conserving (freezing, preserving) and marketing of fish products, and L 1 551 730 000 for the building of new vessels and purchase of gear). There were also other grants in 1979 of L 277 234 655 for the building of new vessels and purchase of fishing gear and an interest rebate of one grant of L 2 826 525 to help build a new vessel.

9.6 Ireland

In Ireland spending on structural policy has been confined mostly to building of new vessels in line with the Fisheries Development Programme. In 1979 I£7.5M was spent on new vessels, mostly under 24 metres. There has also been considerable spending on the infrastructure related to fisheries (port facilities etc).

9.7 France

The figures for France in the table from the European Parliament do not include the subsidy on fuel, which was set at Fr 0.10/litre from 1977 and was recently increased to Fr 0.21. The main emphasis has been on renewal and modernisation of the artisanal fleet, with more than Fr17M being spent on this kind of subsidy in 1979, representing about 14% of total project cost. In addition, there has been substantial spending on the deepsea fishing fleet, according to OECD. However, some of this has been for increasing the tuna fleet, where expansion remains a viable prospect. There has also been investment to improve onshore processing facilities. The fuel subsidy operated by the French government is clearly in contravention of EEC competition rules, but it is also thought that several other subsidies have also been effectively operating aids. Total French aid to the fishing industry in 1981 is likely to reach Fr370M, indicative of massive increases in state aid over the past two years (at the beginning of 1980 only Fr109M was budgeted).

9.8 United Kingdom

In the UK aid to the catching sector over the period 1978-81 totalled £89M, with sharp increases in allocation over the past two years. As far as vessels are concerned, the main area of spending has been for the construction or modernisation of vessels in the inshore fleet, with moderate spending in the form of both grants and loans for the near and middle water fleet. A considerable proportion of the projects approved in 1980 concerned vessels under 12m.

In addition, 1979 saw government spending to cover some of the port costs of the deepsea fleet. In 1980 the government also provided modest funds for exploratory voyages. Although most of the funds allocated for fleet improvement "to meet the opportunities open to it when the CFP negotiations are completed" are compatible with EEC guidelines, there is doubt as to whether some aids in 1980 could not be seen as operating subsidies, which would be contrary to Community rules.

10. EEC RESTRUCTURING POLICY

Structural policy at EEC level so far has, apart from aids several years ago for restructuring of the French and German cod fleets, confined itself to interim measures, guidelines for national restructuring and frequently revised proposals for a Community restructuring policy. The interim restructuring programme, in force since 1978, has been limited to providing subsidies for building vessels in the 12-24m class. Originally intended purely as a temporary measure pending a comprehensive restructuring policy, the scheme has contributed towards modernisation of the fleet fishing in near-home waters, but it has not engendered a balanced development. As noted elsewhere, there is a need for larger vessels to exploit certain fisheries. Usually the EEC contribution to the cost of the new vessel is limited to 25% of total cost, although in certain areas this is raised to 50% (Northern Ireland, Greenland, Southern Italy and Ireland). So far 65M ECU have been allocated for the scheme. The programme also provides funds on a similar basis for the aquaculture sector, the main beneficiaries of which so far have been the UK and Ireland.

There have been criticisms in France that applications for aid have been poorly processed by the French ministry, with the result that French benefit from the scheme has not been spectacular. This is all the more remarkable inasmuch as the scheme would appear to be fairly suitable for encouraging modernisation of the French artisanale fleet. It has been said that, given the inordinate degree of French influence within the EEC Commission, the interim restructuring measures do bear some mark of French inclinations in the agricultural sector, where the provisions of the CAP have, much to the policy's longterm disadvantage, been geared towards the needs of the small producer typical of French farming. It is recognised within the Commission that the scheme has not made a major contribution to restructuring of the entire fleet. However, an element of regionality has been introduced in the choice of projects approved for aid.

Under a separate scheme EEC funds have been allocated since 1977 for improvements in fish processing facilities. Such aid under Reg. 355/77 has been included in a scheme aimed at improving processing in both agriculture and fisheries sectors. Again, the UK has been a major beneficiary of this scheme, along with Italy - a special fund is available for southern Italy. (see table 128).

The current proposals on structures can be broken down into four basic areas: financial incentives for the establishment of joint ventures with third countries and for experimental fishing voyages; restructuring of the fleet; adaptation and development of fish processing and development of aquaculture.

10.1 Exploratory voyages and joint ventures

As far as exploratory voyages are concerned, EEC funds of 10.5M ECU would be set aside over three years to finance partially trips either to new fishing grounds or for new species.

The present market value of new species is far from rewarding and some financial incentive is needed to make such operations viable. At present there is also a growing

suspicion that the new species will never provide a viable alternative to the staple whitefish species. There are indications that the catch of traditional species by those countries which export to the EEC could increase still further, thus bringing down their costs and prices. It would require a draconian import limitation system to stifle the competitiveness of such products. Once thought of as the future of the fishing industry, the new species have lost support recently, and former Commission proposals to provide funds for advertising for them have now been dropped, at least for the time being (partly because of German fears on the budgetary impact).

Table 128. Common measures to improve the conditions under which fishery products are processed and marketed (Reg. No 355/77) Year 1978 2 tranches - Year 1979 2 tranches

Member countries	Number	Contribution given in million of ECU
Germany	5	0.340
Belgium	6	0.293
Denmark	10	0.948
France	7	1 183
Ireland	4	0.491
Italy	17	5 615
Netherlands	4	0.614
United Kingdom	20	1.895
EEC	73	11.380

Source:

Controversy over minimum length

There is still controversy over what should be the minimum length for vessels involved in the search for new fishing grounds and new species. This was originally proposed at 33m, which would have given priority to the British and German distant water vessels at present laid-up or facing the scrap-yard. Other countries, notably Denmark, wanted a lower limit, which would make some of their vessels eligible. Both Germany and France already operate subsidies for experimental fishing (although the British scheme has been criticised for being under-financed), and Community aid would help the finance-troubled distant water operators to stay in business and maintain employment.

At one stage it was suggested that the minimum length for vessels on exploratory voyages be brought down to 24m, which would have meant that Denmark, France and the Netherlands would each have had more vessels available than either Germany or the UK. To dilute the exploratory fishing proposals in this way would be to ignore one of the indirect motives behind them - to maintain some overcapacity in the distant water fleet, preferably by retaining the most efficient vessels. This would prevent their being scrapped or sold to third countries, since it is still hoped that one day the Community might be able to negotiate increased fishing rights in the waters of third countries, and will,of course,need the capacity to exploit such opportunities.

How realistic this hope is is hard to say. Certainly, as time goes on without a CFP settlement, third countries such as Canada are building up their own capacity to exploit the resources within their 200-mile zone, so the chances of their granting quotas to the EEC are constantly diminishing. Other opportunities exist off the west coast of Africa, although an increasing number of countries in that part of the world are demanding that any foreign exploitation of the marine resources in their zone be tied in to joint ventures or involve landing a substantial part of the catch for processing in the coastal state.

Finance needed for joint ventures

This is where finance for the establishment of joint ventures would be advantageous. Not only would it realise fishing opportunities in countries with which a normal bilateral fisheries agreement would not be acceptable, it would create fishing opportunities for an otherwise obsolete fleet. Since the financial viability of joint ventures cannot always be foreseen at the outset (as the Spanish fleet has discovered to its dismay in South America), EEC funds could provide a firmer footing for such ventures and perhaps help cover capital commitment which the third country might require. So far only 6.5M ECU has been proposed for such joint ventrues, and Commission officials are not optimistic about opportunities in third country waters.

There are doubts about the economic viability of fishing distant waters. Off the west coast of Africa the main fisheries which would be viable on the EEC market are tuna, hake, shrimp and squid, which would make them viable propositions chiefly to the French and Italians, who already operate in those waters. It is unlikely that vessels from other EEC countries could be encouraged to try out these unfamiliar waters and markets, especially since at present EEC funds are proposed at only 10.5M ECU, and could well be reduced in the final reckoning.

Under the heading of joint ventures and exploratory fishing there is now also a possibility that EEC funds could be made available for new fishing methods. Whereas there is doubt about the longterm outlook for new species from distant water fishing grounds, the prospects are better for stocks of those species in EEC waters which hitherto have been ignored by some member states. These include, for example, ling and blue ling.

10.2 Restructuring of the fleet

The main instruments of this policy would be temporary laying up subsidies and scrapping grants. Laying-up subsidies would be for vessels in the 18-24m or 50-130 GRT and for vessels over 24m or over 130 GRT. For the first category the engine of the vessel would have to have been built before 1966, and so the older, less efficient vessels would be withdrawn. For the second category, only vessels put into service between 1966 and 1978 would be eligible for the temporary laying-up subsidies.

Scrapping premiums would be available for all vessels over 12m or 25 GRT. As has been pointed out, there is vast variance in structure between the fleets of the member states, and a vague measure such as this scarcely appears to do justice to the different structural problems encountered in individual countries. The danger with such a broad-front policy is that it could simply end up paying cash to those who would likely have withdrawn from the industry sooner or later anyway. The policy is clearly non-specific

and would involve expenditure proposed at 300 ECU/GRT per vessel without making a well-defined contribution to reshaping the fleet of the Community. Both Germany and the UK have objected to this kind of policy but are likely to accept because of possible parallel measures for modernising of vessels (at present carried out under interim restructuring measures financed by the EAGGF - European Agricultural Guidance and Guarantee Fund).

Disadvantages of laying-up premiums

Likewise it has been argued that expenditure on laying-up subsidies also runs counter to what should be the aims of an effective restructuring policy. What it amounts to is making sure that there are more fishing vessels than the optimum number needed to exploit the available resource. It has, of course, been argued that the purpose of such a policy is to ensure that the EEC has sufficient fleet capacity to exploit resources when EEC stocks have recovered from the overfishing of recent years.

But recovery will not be helped unless there is a really effective catch control and surveillance system, and the more vessels that are left in the EEC fleet the less effective such a system is likely to be. Laying-up premiums would have to be very attractive to ensure that a significant number of vessels were laid up, and laid up not only at those times of year when returns from fishing could be expected to be low in any case. Looked at from this point of view, laying-up premiums handed out in this rather indiscriminate way appear to be little more than operating subsidies, even if they are, paradoxically, paid when the vessel is in fact not operating.

Cut in money for scrapping vessels

Total funds last proposed by the Commission for a five-year period for the scrapping premiums are 70M ECU, compared with the 130M ECU proposed in mid-1980. Total cost for scrapping and laying-up premiums is also to be reduced, again because of German concern with the budget. This figure is in sharp contrast to the £330M (530M ECU), including £130M in loans, proposed by the White Fish Authority for the UK in 1978.

However, there is now some support, headed by the Germans and British, for the idea that only specific restructuring programmes for certain sectors or areas should be Community-financed, and that the general task of trimming capacity should fall to the member states directly. This approach would avert an otherwise almost inevitable conflict around the Council table. Those countries which have financed restructuring in the past decade would be unwilling to pay for similar programmes in other countries which had been less discriminate in their financial support of the industry in the past. A specific policy would also lessen the chances of annual Council rows about the share-out of money for restructuring - a general restructuring policy would be no doubt plagued with such arguments and would in the end probably be subjected to and distorted through the traditional EEC trade-off system.

But there are also disadvantages with this otherwise sensible approach - without Community funding restructuring is likely to be a slower approach and could give further impetus to the already growing tendency towards trade protectionism against imports of cheap fish from third countries. Also, it is recognised that if there is final settlement on a CFP, the policy will come in for heavy criticism from the industry, and

if ministers were able to return to their respective capitals with promises of EEC restructuring finance they would perhaps be more tempted to settle the package. But even if the proposed funds had not been reduced since the last formal proposals in 1980, there would still have been very little available for each member state. It will still be true to say that EEC funds are available for restructuring of the fleet, but it will be a very limited truth.

Working out an "ideal" fleet

As to how the funds should be shared out or what form an "ideal" EEC fleet would take, there is still a great deal of uncertainty. At the present time the EEC Commission is working on a computer model of the European fishing industry, but provisional results of that are unlikely to be available before the end of 1981. There has been a trend by the member states to disapprove of Community proposals which infringe on their national policies on social affairs, and so it does seem possible that any computer model based on purely commercial criteria would then be watered down with considerations on employment. This again would reinforce protectionist arguments, which certainly would not mean cheaper fish products for the consumer. A purely commercially based conclusion would also probably mean the end of some ports, which again would be politically impossible for governments to accept. There is a further problem with this kind of model - acceptance of a fleet "objective" implies that there will be no change in stocks, which cannot be ruled out, although no major changes are likely.

One way to implement a sensible restructuring policy would be to introduce a licensing policy, but this at present seems politically impossible. This will be discussed in more detail in section 12.

10.3 Adaptation of the processing industry

At present it is intended that the current schemes already mentioned should be continued in order to provide Community finance for fish processing plants. One area where the Commission might look at providing specific finance would be for plants processing the so-called "new" species. There have been plans (now dropped) to provide Community funds for publicity for such species, but whether the meagre finance proposed would really have affected the market significantly is questionable. Such species might be able to penetrate the market better as processed products, and so it could be worthwhile to provide the processing industry with funds to acquire the necessary equipment, since they are probably in a good position to finance marketing of the new products, both in terms of effective finance and advertising expertise.

10.4 Development of aquaculture

As quotas become enforceable it is likely that greater attention will be paid to aquaculture, both for fish and shellfish. Traditionally, output has been limited to small-scale production of mussels and oysters, but several other species offer commercial possibilities - salmon, trout, sole, turbot, mullet, bass, bream and eel.

Production types and trends vary from one country to another. In Ireland output is low and development is minimal. Denmark offers favourable potential, and could follow

trends in Norway where aquaculture is receiving a good deal of attention and government backing for salmon, trout and shellfish. UK production has tripled in recent years, according to the EEC Commission, and there has been substantial research into seafish farming carried out by the White Fish Authority. As far as modes of production are concerned, Ireland and the UK have large salmon farming undertakings, while in France cooperative establishments are common and in Italy and Ireland shellfish production is generally on a small scale. The main types of fish farming carried out in the EEC are set in the table below.

Table 129. Main types of fish farming carried out in the EEC

Fish	UK	IR	NL	F	I	G	B	DK
Salmon	x	x		x		x		x
Sea trout	x	x		x	x	x		x
Sole	x		x	x	o	x		o
Turbot	x	x	x	x	o	x		o
Mullet				x	x			
Bass				x	x			
Bream				x	x			
Eel				x	x	x		

o: species suitable for short-term farming.

Sea fish farming production runs at about 2 500 - 3 500 t annually, with about two-thirds of this accounted for by Italy and most of the rest by France and the UK. Italian production concentrates on bass, bream, mullet and eel, while there are pilot programmes for significant turbot production in the UK.

Community financing for schemes in the aquaculture sector cannot be expected to exceed 40M ECU for five years. The investment will be restricted to physical investment in fish farming, yet there would also be a good case for investing in market research. It has been argued that the expansion in trout farming in recent years has been accompanied by only minimal market research, to the detriment of producers, and there is a danger of a similar trend for other species.

11. THE LICENSING CONCEPT - A BLESSING AND A CURSE

Much study has been carried out in the field of licensing for fisheries, although so far the incidence of the licensing system in practical terms has been minimal in the Community. The main advantages put forward for licences are various. First, they can be used as a method of enforcing respect for quotas and TACs. Secondly, they can affect the level of effort in specific fisheries or fishing grounds, in line with scientific advice. Third, they can be used as an element of social policy, giving preference to fishermen in certain areas or carrying out certain kinds of operations from areas highly dependent on the fisheries income. Fourth, they can form part of a restructuring plan, aimed at improving efficiency and profitability. And fifthly, at a more advanced stage, they could be used to regulate market supplies thus improving stability of prices and incomes.

But the imposition of a licensing principle is not without its drawbacks, both practical and political. First, there would be heavy objection to the very idea of introducing specific limitation on production in an industry which historically has relied heavily on personal skill often handed down from father to son. Under that philosphy the catch is rightly deemed to be indicative of personal skill. This view is deeply embedded, and it would be overcritical to refer to it as anachronistic - it is really only within the past 15 years that the concept of fish as an inexhaustable resource has been dropped and been replaced with the recognised need to restrain effort somewhere, somehow. It is also during the same period that technology in the fish-finding, catching and onboard processing has come into its own; this has had a twofold effect - first it has emphasised the need for restrictions to prevent the sea from being fished dry, and second it has taken some of the emphasis off inherited skills.

Difficulties of administration and control

There are also more concrete objections to licences. The principle works best in a restricted area with a small number of boats, a relatively modest range of species and a small number of ports. Obviously the administrative problems become vast when applied at national level. On top of that, there is the problem of boats landing in foreign ports. Where there is a broad range of species the problem of multi-purpose vessels, which in economic terms seem to offer an economic alternative in the future European fleet, would arise since each species could be subject to a different licence. Over-the-side sales to foreign processing vessels would also require strict control if the licence were to be effective; however, this problem would arise with only a limited number of species.

One other problem of the licensing concept is that without a sensible restructuring policy licences would tend to exacerbate rather than alleviate the problem of over-capacity. Allocation of licences would have to be seen in the longterm as being linked to a plan for adjusting capacity. Again, it has been suggested that licensing could achieve this too - sales of licences by auction would mean that only the most efficient operators would be able to offer the best price.

That is fine in economic theory, but runs into several social objections. There is reason to believe that over time a constant number of licences would end up in an ever smaller number of hands, which could discriminate against the young entrant into the

industry. Also, a licensing system based on pure commercial terms such as these would work to the disadvantage of operators in the economically less favoured regions. To work out how and what kind of compensatory mechanism be set up for these operators would be a practical and political headache.

When examining licensing and restructuring the policy makers should also be aware of the chaos that was created in the EEC's sugar beet sector when a system of quota licensing was introduced - in the absence of sufficiently stringent policy guidelines the industry merely became ossified in its existing structure, efficiency was, in general, not improved and the problem of overcapacity persisted, again largely because it was impossible to agree on which member state should bear what share of the cutback needed.

Problem posed by small vessels

The sheer number of small boats in several member states would also create administrative problems - it might be suggested that all vessels under a certain size be exempted from the need to hold licences, but this would create unfair advantage for some countries, depending on the proportion of total catch which is landed by the smaller vessels. And to exempt them from licences would perhaps be a counterforce to the need to cut back the number of very small vessels.

Despite these disadvantages, licensing has been advocated time and again by observers of the industry. To be effective a licensing scheme would have to be established at Community level. Thus it could be coordinated with parallel policies on conservation, restructuring, quotas/access, the social element and marketing. In ideal circumstances it could serve as a linchpin in the CFP, and yet so far it has not received the discussion time it merits.

This lack of attention to such a system is explicable. By and large it would be used as a means of implementing the CFP, and cannot be seen as the raison d'etre of the policy. Until there is agreement on the rest of the policy there could be no practical discussion of licensing. But the danger is that unless it is discussed within the framework of ministerial meetings it will not be allocated the importance it deserves, or might not even be discussed at all.

12. EEC MARKETS POLICY

12.1 The fish market - a case for cautious control and support

The advent of the 200-mile zone has clearly had a substantial effect on the market for fish. Loss of distant water catching opportunities has meant increased dependence on imports, although the market support and stabilisation measures implemented by the EEC have not changed essentially since their inception in 1970. This again is indicative of the failure of the Community to agree upon a CFP, and has had dire effects on the EEC fishing industry.

Imports up but consumption down

Over the period 1975-79 imports of all categories rose by 37% in weight and 100% in value. By far the main component of the imports is fresh, chilled and frozen fish to replace the catch of the lost distant water fleets. In 1975 imports of this category were 436 000 t worth 315M EUA but by 1979 had risen to 607 000 t worth 734M EUA. Most of this was cod, haddock, herring and hake from Canada, Iceland, Norway, the Faroes, Sweden, South Africa and the United States.

At the same time per capita consumption of fish has been declining for over twenty years, although trends in recent years have fluctuated considerably, largely due to changes in the species mix, which obviously have different effects in countries with different consumption priorities. Moreover, heavy support in EEC agriculture has resulted in declining competitiveness of fish vis-a-vis other protein sources produced in the Community. (see table 130 on German price development - this is perhaps more reliable as a guide than UK prices, which have suffered the impact of EEC accession also). The political impossibility and economic undesirability of introducing an equally lavish support system for fish do not make the task of deciding on an effective markets policy for the future any easier. Ironically, however, markets provisions for both fish and agricultural products are based on similar criteria, as laid down in the Treaty. These conditions are:

a) to increase productivity

b) to ensure satisfactory earnings to the producer

c) to ensure market stability

d) to improve security of food supplies

e) to guarantee reasonable prices to the consumer.

A comparison of agricultural and fisheries policy is not within the scope of this report, but suffice to say that for neither fish nor agricultural products have all five goals been fully achieved.

Table 130. Germany: retail prices for fish and competing products

Product \ Price	1979	1978	1979/1978	1978/1977	1977/1976	1976/1975	1975/1974
	DM/kg						
Saithe fillet	8.29	8.25	+ 0.5	+ 12.4	+ 8.3	+ 8.5	- 2.8
Redfish fillet	12.13	11.95	+ 1.5	+ 5.4	+ 8.5	+ 2.9	+ 4.4
Cod fillet	8.83	8.22	+ 7.4	- 3.1	+ 10.7	+ 11.3	- 0.3
Cod, head off	8.98	8.94	+ 0.4	+ 0.3	+ 10.1	+ 5.9	- 0.5
Redfish fillet, frozen	10.88	10.65	+ 2.2	+ 6.8	+ 4.5	+ 1.8	+ 12.9
Fish fingers, frozen	8.45	8.41	+ 0.5	+ 2.1	+ 1.2	- 3.7	+ 4.3
Stewing steak	9.04	8.95	+ 1.0	+ 1.4	+/- 0	+ 6.1	+ 4.0
Pork chop	10.81	11.08	- 2.4	+/- 0	- 0.5	+ 9.7	+ 2.5
Chicken	4.79	4.80	- 0.2	- 0.8	+ 1.3	+ 6.7	- 4.1
Egg	0.23	0.24	- 4.2	- 4.0	+ 4.2	+ 9.1	- 12.0
Cheese (Emmental)	14.02	13.61	+ 3.0	+ 3.1	+ 2.7	+ 5.7	+ 10.0

Source: Regional Statistical Office, Hamburg; Federal Statistical Office, Wiesbaden.

12.2 Common organisation of the market

The first moves towards common organisation of the market for fish and fish products were made in 1970. Common financing was from that time available for several measures aimed at fulfilling the aims set out above. Common standards for marketing were established; these laid down fixed criteria for quality, size and freshness (although adherence to such standards could be much improved). At the same time a common guide price was established for most of the major species caught in the EEC; on these guide prices are based the withdrawal prices (fish must be withdrawn from sale for human consumption if it fails to attract this price on the open market). Both the above measures are carried out through the Producers' Organisations set up at the same time with EEC funding. Finally, reference prices were established for the main categories of fish products; their function was to ensure that imports did not undermine the incomes of Community fishermen. This corresponds to the key provision of Community preference as laid down in the Treaty.

While no major changes in these market regulation principles are necessary, there has been great criticism of the mechanisms in their present form. Imports now represent a much greater share of EEC whitefish consumption, and so their impact on market formation is so much the more pronounced. Large quantities of white fish have come onto several Community markets below the reference price, which is not always applied automatically. There have also been similar cases with herring, and cheap shrimp and lobster could also become a threat. In addition, major processors are often better equipped now to deal with imported frozen blocks than with fish produced in the EEC, so that EEC producers can suffer due to non-price factors, also.

12.3 Reference price mechanism

It is extremely difficult to establish exactly what effect imports have had on domestic prices. There are in effect eight different national markets, seasonal fluctuations, cross elasticities between different species and presentations and changes determined by consumer spending patterns. What can be seen, however, is that cod prices have in general not increased as rapidly as those of several other species, and this trend could be ascribed to the much greater part of cod consumption accounted for by imports of frozen fillet. During 1980 there was, in fact, stagnation of prices for many species. However, it should again be stressed that overcapacity in the EEC fleet does not help EEC fish to compete against imports. Also, as a greater proportion of fish is used for production of highly processed products it is often the case that fresh fish loses some of its premium differential over frozen blocks, which account for a substantial part of imports. Processors also argue that cod from the EEC zone is in any case unsuitable for processing and so application of the reference price would not improve returns to the nearwater fishing sector.

Slowness to detect imports

The main problem with the reference price mechanism so far has been its unwieldiness compared with comparable instruments in agriculture. It is not unknown for imports to penetrate the EEC market in large quantities for several months below the reference price before any action is taken in Brussels to ensure respect of the reference price.

At first sight this might appear to play into the hands of the processor, who is thus assured supplies of cheap raw product. However, this is not the sole factor. As noted earlier, fish consumption shows a high price elasticity in the face of competition from other protein foods, and any sharp rise in final prices of processed products could rapidly make itself feltin falling sales. And, as with most non-luxury foods, consumption once lost is hard to recapture. This trend would mean a threefold loss. First, employment in processing would be sacrificed, perhaps at the expense of maintaining jobs in an already overmanned fishing fleet. Secondly, were processing capacity to be cut back in the long run, prices to fishermen could suffer through loss of one major sales outlet. Thirdly, income and investment in the fishing industry would stagnate and the consumer would either lose out on product range or be forced to buy processed products imported from those countries which at present supply mostly raw material for the domestic processing industry.

Measures now put forward by the Commission would result in a more flexible reference price system which could be applied at short notice. However, it still seems likely that there would be inevitable delays, because imposition of the reference price could still only be recommended where there was evidence that domestic prices were coming under unreasonable external pressure. Under the proposed system the reference prices would cover most of the major species, fresh, chilled or frozen, with the notable addition of lobster and salmon to the list, largely due to pressure from Britain and Ireland. But there still appears to be reluctance to impose draconian measures on cheap imports - perhaps some lessons have been learned from the failures of Common Agricultural Policy. Cheap imports would encourage rationalisation of the EEC catching fleet, and it should be possible to channel that rationalisation by means of an effective restructuring policy. The danger with a more flexible reference price system is also that, given a growing tendency towards EEC protectionism, it could be abused to protect inefficient producers.

A cautious approach to reference prices is also needed in connection with the EEC's commitments to GATT (General Agreement on Tariffs and Trade). Several countries enjoy tariff concessions on certain quantities of fish exported to the Community. The latest proposals suggest that these countries would have to exploit their concessions in terms of increased profit margin rather than through sale below the reference price, although this threat is left vague in the proposals, probably not least because too strict an interpretation might provoke complaints that the GATT concessions were not being fully respected by the EEC. The major GATT concession covers 10 000 t frozen cod fillet, mostly supplied by EFTA countries.

There are at present also a number of suspensions or abatements of the common customs tariff on certain products, although pressure from processors to have the list expanded is regularly dismissed. At present the list comprises the following categories (although the list is revised frequently):

Table 131. Council Regulation (EEC) No 1680/81 of June 11, 1981 - temporarily suspending the autonomous Common Customs Tariff duties on a number of agricutural products

TABLE I

CCT heading No	Description	Rate of autonomous duty (%)
ex 03.01 B II a) and B II b) 7	Fillets of herring, fresh, chilled or frozen, intended for processing (a) (b)	3
03.02 A I a)	Herring, dried, salted or in brine, whole, headless or in pieces	8
ex 03.02 A II d)	Fillets of herring, dried, salted or in brine	8
ex 16.04 C II	Spiced and salted herrings, in immediate packings of a net capacity of 10 kg or more	8
ex 16.04 C II	'Herring-flaps' prepared orpreserved in vinegar, in immediate packings of a net capacity of 10 kg or more	8

TABLE II

CCT heading No	Description	Rate of autonomous duty (%)
ex 03.01 B I e)	Piked dog-fish (Squalus acanthias), fresh, chilled or frozen, whole, headless or in pieces	0
ex 03.01 B I q)	Sardinops sagax or ocellata, fresh, chilled or frozen :	
	(a) whole, of a length of 20 cm or more ;	
	(b) headless, of a length of 15 cm or more, intended for processing (a) (b)	4
ex 03.01 B I q)	Flaps of Sardinops sagax or ocellata, fresh, chilled or frozen, of a length of 12 cm or more, intended for processing (a) (b)	0
ex 03.02 A I f)	Coalfish (Pollachius virens or Gadus virens), salted or in brine, whole, headless or in pieces, intended for processing (a) (b)	8
ex 03.02 A II d)	Fillets of coalfish (Pollachius virens or Gadus virens), salted or in brine, intended for processing (a) (b)	9
ex 03.03 B I b)	Oysters, fresh (live), weighing no more than 12 g each	9
ex 07.04 B	Sweet red, or green, peppers, dried, dehydrated or evaporated, whole, possibly cut or sliced, but not further prepared	10
ex 07.05 B I	Beans, white, dried, of the species Phaseolus vulgaris	0
ex 08.01 A	Dates, fresh or dried, for packing for retail sale into immediate packings of a net capacity not exceeding 11 kg (b)	0
ex 08.10 D	Dates, frozen, in immediate packings of a net capacity of 5 kg or more, not intended for the production of alcohol (b)	0
ex 16.05 A	Crabs of the species 'King' (Paralithodes camtchaticus), 'Hanasaki' (Paralithodes brevipes), 'Kegani' (Erimacrus isenbecki), and 'Queen' (Chinoecaetes spp), 'Red' (Geryon quinquedens) and 'Rough stone' (Neolithodes asperrimus), simply boiled in water and shelled, whether or not frozen, in immediate packings of a net capacity of 2 kg or more	0
ex 16.05 B	Shrimps and prawns of the species 'Pandalus borealis' boiled in water and shelled, whether or not frozen or dried, intended for the industrial processing of products falling within heading No 16.05 (b)	12

(continues)

Table 13: (continued)

TABLE III

CCT heading No	Description	Rate of autonomous duty (%)
ex 03.01 B I g)	Lesser or Greenland halibut (Reinhardtius hippoglossoides otherwise known as 'Hippoglossus reinhardtius'), fresh, chilled or frozen, whole, headless or in pieces	0
ex 03.03 B I q)	Sturgeons, fresh, chilled or frozen, whole, headless or in pieces, intended for processing (a) (b)	0
ex 03.01 C	Soft roes, frozen, intended for the manufacture of deoxyribonucleic acid (DNA) (b)	0
ex 03.01 C	Hard fish roes, fresh, chilled or frozen	0
03.02 A I e)	Salmon, salted or in brine, whole, headless or in pieces	4
ex 03.02 C	Hard fish roes, salted or in brine	0
ex 03.03 A I	Tails of crawfish, chilled or frozen, shelled or not	15
07.01 G III	Horse-radish (Cochlearia armoracia) fresh or chilled	11
ex 07.03 E	Mushrooms, excluding cultivated mushrooms within the meaning of subheading 07.01 Q I, in salted or sulphur water or to which other substances ensuring their temporary preservation have been added, but not specially prepared for immediate consumption	0
ex 07.04 B	Mushrooms, excluding cultivated mushrooms within the meaning of subheading 07.01 Q I, dried, dehydrated or evaporated, whole or in identifiable slices or pieces, intended for treatment other than simple repacking for retail sale (b) (c)	0
ex 08.01 A	Dates, fresh or dried, intended for the processing industry, other than for the production of alcohol (b)	0
ex 08.09	Rose-hips, fresh	0
08.10 ex B, C and ex D	Fruit of the species Vaccinium, whether or not cooked, in frozen state, not containing added sugar	0
ex 08.10 D	Rose-hips, whether or not cooked, in frozen state, not containing added sugar	0
ex 09.04 B I	Ground paprika for use in animal feedingstuffs (b)	0
ex 15.07 D I b) 2	Purified soya-bean oil in glass bottles. Each bottle holds 10 litres of purified soya-bean oil containing by weight : — a minimum of 8·5 % and a maximum of 12 % of palmitic acid esters ; — a minimum of 2·5 % and a maximum of 4·7 % of stearic acid esters ; — a minimum of 22·4 % and a maximum of 29 % of oleic acid esters ; — a minimum of 46·6 % and a maximum of 53·7 % of linoleic acid esters ; — a minimum of 7·4 % and a maximum of 11 % of linolenic acid esters ; and containing : — not more than 5 millimoles of free fatty acid per kg of oil ; — phosphalipids corresponding to a nitrogen content not exceeding 0·04 mg per gram of oil. The soya-bean oil covered by this description is destined for the preparation of emulsions for injections (b)	8 with a maximum duty of 50 ECU per 100 kg net weight, plus a compensatory amount in certain conditions
ex 16.04 A II	Hard fish roes, washed, cleaned of adherent organs and simply salted or in brine	0
ex 16.04 B I	Salmon for the processing industry for manufacture into pastes or spreads (b)	0
23.07 A	Fish or marine mammal solubles	0

12.4 Withdrawal prices

Much for the same reasons as set out above caution is needed in setting withdrawal prices. In the past there has been a tendency to set them as low as possible, because to do otherwise would not only encourage fishing simply for sale into intervention (as has become an inherent problem in agriculture), but could also tend to push up final prices to consumers, again bringing to the fore the price elasticity threat.

Future policy on withdrawal prices is at present unclear. They would be set at 70-90% of the guide price, compared with 60-90% at present, although they have in any case never been set below 70%. But the Commission is adamant that "the guide price level cannot be considered as representative of a satisfactory average price ensuring a fair income to producers, but as a firm floor above which this income must be constituted and developed".

It is also proposed to introduce into the withdrawal price system an element of co-responsibility such as exists in the Community's agricultural domain. This would mean in effect that the level of Community financial responsibility for buying in fish which fails to sell at or above the withdrawal price would diminish in proportion to the cumulative total withdrawn. In theory, this should give more incentive to the Producer Organisations to adopt policies ensuring a stable flow of landings over the course of the year. In practice, however, co-responsibility in the farming sector has not been the world's greatest success story, since the degree of co-responsibility has generally not been set at an effectively high level. This has been the result not least of the considerable Brussels influence of the agricultural lobby.

Inflexible system

One of the basic problems with the withdrawal system (as with reference prices) hitherto has been its inflexibility, which has resulted in several organisations setting up their own withdrawal system with higher withdrawal prices. These systems are not funded by the Community. The system now proposed would allow official withdrawl prices to fluctuate over the course of the year, as long as the average approximated to a central value set annually. But autonomous withdrawal prices would not be outlawed. Thus the Producer Organisations could still withdraw fish at a higher cost at their own expense, and this could conflict marginally with rationalisation plans at EEC level. Low withdrawal prices do not ensure a worthwhile level of income, and thus could in an extended period of poor prices drive the less efficient producer out of business. But this is not a major concern - sales into both official and autonomous withdrawal schemes have seldom represented a significant proportion of catch over long periods of time.

One significant change to the internal markets regime would be the implementation of processing or storage premiums for fish which failed to meet the withdrawal price. This has the advantage of averting denaturing of high quality fish during perhaps only a very shortlived period of depressed prices. It is to be hoped that this kind of operation would be used only as a last resort and not as a source of permanent income, which would saddle the Community with yet another food surplus and ensure the continued operation of inefficient vessels. It might also be useful to provide funds for the improvement of the storage facilities which the Producer Organisations would use. Total withdrawn quantities are set out in table 132, showing that average annual withdrawals are well below 2% of total EEC fish production.

Table 132. Intervention measures in the Community (at Community withdrawal prices) (tonnes)

	1977 t	1978 t	1979 t	1980 1.1.80-10.6.80
Germany		5 485	7 510	4 816.5
Belgium	1 145	1 200	1 111	1 223
Netherlands	3 036	1 412	1 829	1 430
France	6 244	6 659	10 353	6 000 *
Ireland	4 818	11 185	8 363	2 204
Italy	2 032**	24 176	33 260	10 000 *
United Kingdom	32 508	8 119	2 452	4 891
Denmark	1 006	1 452	3 558	2 407
	50 788	59 633	63 709	32 000 *

* Provisional. ** Since October 1.
Source:

12.5 Improvements in markets dossier

Several improvements could be made to the existing proposals on the markets dossier. Funds could be allocated to encourage the formation of marketing schedules by the Producer' Organisations. This is already the aim of introducing flexible withdrawal prices, but since these have to be set at very low levels they are unlikely to provide a great deal more incentive than the present system. If supplies could be stabilised, not only would fishermen be able to secure a stable income, but the domestic catching industry would be able to compete better with regular imports of frozen fillets if it could likewise ensure more regular delivery.

It might also be worthwhile for the Community to provide funds for the establishment of an EEC fisheries prices network, again with the idea of stabilising prices and incomes. The major nations exporting fish to the Community market are themselves seeking to establish such a network, and it would be a further blow to the domestic industry if it were at a disadvantage in this respect too (although informal information exchange of this kind does take place now through EEC Fisheries Management Committees).

One element which has not been included in the latest proposals is provision for more stringent control of quality standards. Again, improvements here might serve to sort out the more efficient producer, and help competition against imports. An increasingly automated processing industry needs properly graded and standardised raw material. More stringent quality standards could be applied by Producer Organisations.

13. SOCIAL POLICY - IMMEDIATE NEEDS AND LONGTERM STRATEGIES

The proclaimed aim of the CFP is that of "achieving a just balance between production and market requirements". Success here will be largely determined by the degree to which the industry can be rationalised and adapted to changing requirements. This is the task of the restructuring policy, which should work in parallel with a social policy.

The social policy should not be seen merely as a safety net designed to offset the consequences of restructuring of the EEC fishing industry. It should rather form an integral and dynamic part of the structural policy itself. Too often the consequences of restructuring, past and present, are seen as being limited to the impact on unemployment, particularly in dependent regions. The problem is, in fact, much more complex - just as restructuring of the industry is not confined to a simple reduction in capacity, so in the employment sector it is not sufficient merely to find alternative employment for displaced fishermen.

New skills will be needed

Modernisation and adaptation of the industry is going to require new skills at sea, greater mobility of labour, knowledge of marine biology, understanding of commerce and economics etc. Improved training should contribute to a more competitive industry in the long term. Thus the employment and training aspects are the social elements in a rationalisation programme.

Although safety at work is not included specifically in the Treaty provisions on agriculture and fisheries, it is accepted that the need "to ensure a fair standard of living for the agricultural (including fisheries) community" encompasses safety and health at work and working conditions. These form the other two aspects of a social policy in fisheries, and have been included in the Commission's proposals on social policy.

13.1 Employment

Employment in fisheries over the last ten years has fallen by over 9%, and projected restructuring of the industry is likely to result in a further decline. The main cutbacks in employment have come in France, the Netherlands, Belgium and Germany, while numbers have remained hardly unchanged in Denmark and Italy and have risen in Ireland and the UK. Only in Ireland is it likely that significant growth could continue. Schemes to explore and if possible exploit new species and fishing grounds could provide some employment, but it is unlikely that this would result in major changes, certainly not before the long term. Aquaculture too could create jobs.

Limited chances of alternative employment

So far the EEC Commission has been unwilling to say what the employment (or even fleet) requirements of the fishing industry are likely to be in the future. But it has highlighted the major problems, especially in those areas dependent on fisheries for income and where opportunities to establish other industries are limited. It is stressed that one job in fishing corresponds to four or five on land in, for example, processing, sales, gear manufacture, boatbuilding etc. But it is not necessarily true to state that

this one job at sea "creates" those four or five jobs on land - some of them could just as well be sustained with imported fish. In addition, although no precise figures are available, it is probably true to say that the employment multiplier in fisheries has not improved as rapidly as it has done in agriculture, where there has been a considerable fall in numbers in primary production and a vast increase in those employed in processing.

The task facing an EEC social policy for fisheries will be largely determined by the needs of dependent areas, and conditions in those areas will in turn be partly determined by the outcome of the CFP negotiations on access. (Here, "dependent areas" refers to the areas set down in the Hague Agreement - Ireland, the North of England, Scotland, Northern Ireland and Greenland). It will be essential to maintain employment in these areas, although how much EEC finance, if any, would be available to this end is so far unclear.

Limited funds available

The employment problem in other areas affected by structural changes in the industry (this could include Hull, Grimsby, Fleetwood, Bremerhaven, Cuxhaven) would simply be dealt with by means of existing instruments, on the basis of the Commission's proposals. The European Social Fund can only provide funds for those leaving fishing to work in another sector or to those whose unemployment is due to structural changes in industry. But it should be added that funds available under the Social Fund are meagre and are likely to remain so for some years to come; the possible benefits would be spread very thinly. Moreover, in a Community of Ten the competition for these sums of ESF money is intense, especially in times of high structural unemployment in many areas and sectors.

Since the precise requirements of a social policy, as far as employment is concerned, will not be calculable before the major issues of the CFP are settled, the most that can be agreed is a resolution by the member states to do something about the employment issue themsleves. Plans have already been announced in France to this effect. On the other hand, there is a general trend towards cutbacks in public spending in many Community countries, and it is far from certain that those countries will be willing to make up the difference between modest EEC spending and the sums really required. The impact on employment of adapting the fleet to the changed conditions will only be slightly cushioned by EEC spending.

Training to meet modern requirements

There is a growing school of thought within the fishing industry that believes that training purely through experience is not adequate for the needs of the modern fishing industry. On the basis of this France, for example, has announced plans to improve training facilities and preliminary studies have been undertaken in the UK.

This was also the view taken by the Commission in its proposals on the training aspect of a social policy, where it recommended that a minimum of vocational training be made compulsory. How practicable this would be in outlying areas is not clear, again given the fact that public spending on education has been cut in some countries in recent years. Some money could be made available from the ESF, but without

commensurate financial participation by the member states there would be uneven rates of progress throughout the Community.

There are several areas where training could be improved or rather expanded; an efficient fishing industry would require crew versed to some extent in the applied economics of the fishing industry, marine biology, management of resources, laws and regulations governing fisheries, business management, market organisation and aquaculture. This would be additional to basic existing training in seamanship and engineering. These new requirements correspond to the growing use and potential of technological innovation in the industry, without whose introduction competitiveness is bound to be slowed down.

However, it now seems as if this important aspect of fisheries development will be absent from a Common Fisheries Policy. The Germans in particular are very sensitive about increased spending on any EEC policy. So here the onus is in the end likely to lie with national governments, meaning uneven rates of improvement across the Community in an industry which should be subject to a common policy.

13.2 Safety and health - the need for improvement

One study on training requirements in the British fishing industry noted: "The accident record within the industry is poor and should be unacceptable, and is significantly worse than that of almost all other industries, including mining and construction, long regarded as the most dangerous of occupations." [1] In fact, fishing fatalities in the UK are about 11 times more frequent per 100 000 employed than in mining . Indications are that there is also ample room for improvement in other EEC countries. Accident prevention has lagged behind other sectors, as have international standards - even International Labour Organisation conventions do not cover fishing.

Main improvements suggested by the Commission include harmonisation of construction and equipment standards. A coordinated accident research network could be set up at EEC level to study how common accidents could best be prevented, but this too will probably fall victim to the budgetary axe. Some improvements could be made immediately, including stipulations on medicine chests and medical handbooks. However, if these have not been introduced at national level, or cannot be properly enforced, it is hard to see what change an EEC resolution could effect. The moral responsibility lies with member state governments to introduce legislation which should have been implemented years ago.

13.3 Conditions of employment - is harmonisation possible ?

Given the extremely diverse nature of the fishing industries, both within national boundaries and even more so at EEC level, there is a limit to which harmonisation of working conditions can even be contemplated. Not only are there immense practical difficulties, but there are such variations in national approaches to these matters that any Council resolution tends to go little beyond what the member states would in any case have implemented. There has been no effective move at Community level to

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1) Survey of Training Needs in the Sea Fishing Industry. Metra Group, 1980.

harmonise conditions of employment in agriculture, and at this stage it is not the Commission's intention to propose harmonisation of labour legislation on fishermen in the member states.

However, there have been suggestions to phase-in a minimum wage for fishermen and gradually replace the profit-sharing schemes which at present form the bulk of income in many areas and sectors. Such plans are bound to run into opposition from a highly traditional industry, but they would be consistent with the aim of stabilising supplies and prices. There would be more incentive to spread vessel earnings out over the length of the season, but the practical difficulties of introducing such a system would be considerable. A wage system would go hand in hand with establishment of longterm contracts, which would improve job security for fishermen.

Regulation of working hours?

Equally hard to enforce within the traditional structure of the industry would be plans to regulate working hours at sea. Safety might be improved by such a scheme but productivity on the other hand might suffer. If the Commission's proposals were adopted then fishermen would be entitled to eight hours rest every 24 hours on vessels spending more than 48 hours at sea.

Even more so than in the areas mentioned above there would be considerable national opposition to Community plans for harmonisation of retirement and pension schemes for fishermen. Such plans might have been feasible in the EEC during the sixties, but would now be viewed with suspicion by some countries as infringing on areas of national policy. The table below gives an idea of the different national situations in 1978 on qualification age for pensions.

Table 133. Qualification age for pensions in 1978

Member state	Age
Belgium	60
Denmark	67
West Germany	63 - 65 [1]
France	55 (50 with sufficient length of service)
Ireland	65
Italy	60 [2]
Netherlands	65
UK	65

Notes: 1) Since the beginning of 1979 the German Seamen's Fund has been able to offer pensions from the age of 55.
2) 55 years where certain conditions are met, with the option of working until 60.

Once proposed Community-funded schemes to encourage retirement from the industry also seem a likely candidate for scrapping in the present mood of budgetary stringency. As noted earlier, there is considerable variance in the age structures of the fishing industries of the member sates, although it can be said that in general the proportion of men over 40 working on inshore and coastal vessels is higher than in the rest of the

fleet. Whether this would facilitate a policy of induced retirement is not certain, since there is a stronger tradition of vessels being handed from father to son in the small vessel sector. A retirement scheme could perhaps lead to some reduction in manning and, with a younger industrial age structure, there might be more willingness to adapt. But the scheme would have only a moderate effect on numbers of vessels.

Where safety, health and working conditions are concerned it seems likely that any EEC initiative could only lay down fairly flexible guidelines without any time limit being set for their introduction. On the other hand, where issues of employment and training are concerned, there should be a clear-cut case for prompt and committed action. If Community funds were to be made available for these aspects of the policy they would stand a much greater chance of success and could serve to accelerate and re-inforce the industrial restructuring process while simultaneously alleviating the social impact of such changes as are necessary for the establishment of an efficient fishing industry.

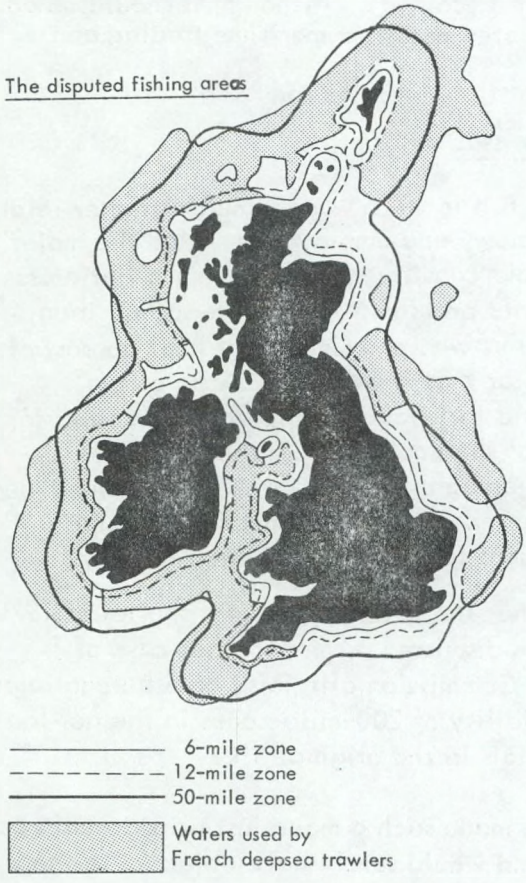
14. TREATIES, COUNCIL NEGOTIATIONS

With the fisheries dispute in the EEC still unsettled it cannot be said that what has happened at EEC level over the last 10 years on fisheries is mere history. On the contrary, an understanding of the last 10 years' developments is essential for any analysis of the present impasse.

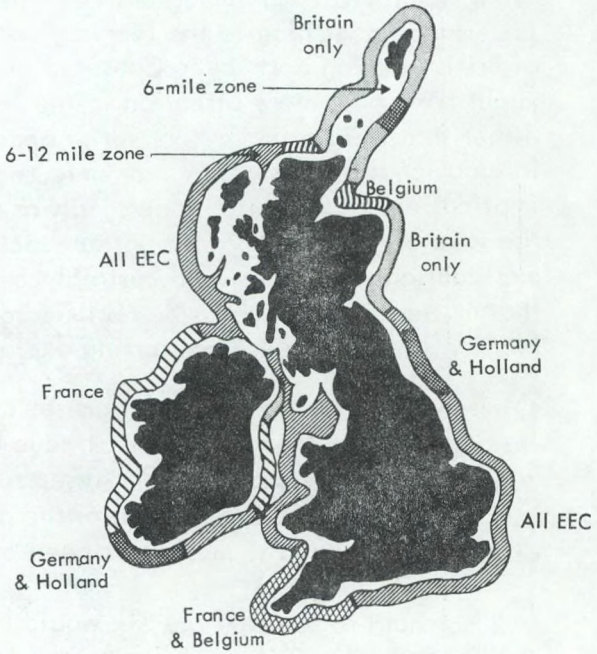
Much of the present disagreement can in one way or another be traced back to 1970, when the EEC of Six agreed on a common marketing policy for the fishing industry based on the principle that fish is a common resource (and therefore, naively speaking, perhaps firm ground for the kind of common policy to which the EEC-6 attached so much importance in the untroubled economic climate of the 60s). This policy laid down the principle of equality of access by all EEC fishermen to all EEC waters; as is well-known, that stipulation has been at the root of the Council of Ministers' dispute for over four years now.

Establishing principle of equal access

During the British accession negotiations this was pointed out as a dangerous prospect by British fishing interests, and Britain, along with the two other acceding nations succeeded in obtaining a derogation to this which would guarantee rights for the UK inside six miles (and twelve miles in some areas - see map) until the end of 1982. There has for years been a feeling in the UK that the EEC of Six made certain of establishing at least the principle of equal access, if not the practice, before the first enlargement.



Source: Le Nouvel Economist



EEC fishing rights off Britain and Ireland

Apologists for the Community put forward several explanations of the move made by the Six in 1970. It is argued that the process of harmonisation of policies had to continue on all fronts regardless of the enlargement talks, especially since it was not certain that all the applicant countries would eventually join up with the Six. This was indeed the case with Norway, which voted against EEC membership in its 1971 referendum. One of the main reasons for Norway's refusing to join was in fact the insistence by the Six on equal access beyond the 12-mile limit.

Britain "did not know" about 200-mile zones

Apologists for Britain have on the other hand argued that the implications of the 1972 acceptance by the UK of only temporary derogations on the coastal band can be forgiven, since the introduction of 200-mile zones within a matter of four or five years could not be foreseen. This argument is hard to accept, since by that time discussion of much wider economic zones was by then well established. Norway had certainly heard about it, and it is inconceivable that this was not mentioned sometime, somewhere by a Norwegian official to a British official. And by the time of the British Labour government's renegotiation of the conditions of accession in 1975 there was clearly no excuse for ignoring the introduction of 200-mile zones, which was just around the corner.

But, caught up in and blinded by its legal wrangle with Iceland, Britain refused to countenance the blow to its pride which would have come through recognition of what was about to happen, since that would have jeopardised the outcome of the pending International Court case it had brought against Iceland. (Although it should be added that Britain's opposition to larger zones also stemmed from maritime trading and outmoded military considerations).

Norway rejects EEC membership on fisheries issue

What separated the Norwegians from the British in 1971 was the much greater relative importance of fishing to the Norwegian economy and employment. Had the majority of British fishing ports been Conservative-held constituencies Britain's negotiators might have paid more attention to the fisheries problem. The inference is, then, either that Britain had a poor set of negotiators who had simply not kept abreast of international discussion on economic zones, or that it was fully aware of the implications of 200-mile zones and was afraid to jeopardise the accession talks for the sake of a relatively unimportant sector of the economy. Another possible explanation - which would certainly be "thoroughly British" - is that it was thought that matters could perhaps be rectified once accepted as a member of the club. None of these are very comforting explanations to the British fishing industry.

Often enough British and Irish accusations that the EEC-6 move on fisheries of 1970 was little better than a dirty trick have been dismissed as just another case of "EEC bashing". If, as has been asserted by Commission officials, British negotiators in 1971 should have been aware of the possibility of 200-mile zones in the not too distant future, then so must have been officials in the original Six.

It is not hard to see why the Six would have made such a move just prior to enlargement. If left until later Britain, Norway and Ireland would surely have objected to the

proposals (assuming Britain had adopted a less rigid position on the Iceland issue), but none of these countries could justify sacrificing the benefits of membership for the sake of the fishing industry. Only Norway could permit itself such a position (although there were of course other reasons for Norway's decision not to join).

Five-year dispute on quotas and access

Ireland has managed to recoup some of the losses made in the accession negotiations by way of the concession of the Hague Agreement of 1976, but so far Britain has not been successful. The Iceland issue dominated the fisheries scene until 1976, and the ensuing introduction of an EEC 200-mile zone heralded the five-year dispute on the Community share-out of quotas within the "Community pond".

As is well-known, one of the main matters of dispute has been Britain's demand for recognition of its "contribution to the common resource" when settling the quotas. Successive British fisheries ministers have argued that since around 60% of the fish in the EEC pond comes from the British 200-mile zone this should be taken into clear account where quotas are concerned. Legal experts defending the Commission, which opposes any consideration of this kind, have dismissed the British case. They say that since Britain only extended its economic zone to 200-miles in harmony with the rest of the Community on the basis of a Council resolution, the fish within that zone cannot be regarded as ever having "belonged" to Britain in the first place.

Figures tend to justify UK case

Legally speaking the Commission is on firm ground, but data on historical catches does nonetheless appear to justify the British case. Whether or not fish as a common resource can "belong" to any one country in the first place is a matter of legal nicety beyond the scope of this report, but it cannot be denied that the other member states take a large proportion of their catch within the UK zone, while Britain catches precious little in theirs. Figures are given in the table on page 139. Britain may have the figures on its side (and vague Hague concessions), the other member states have the whole weight of the Treaty and EEC legislation behind them. This should have been recognised and turned into concrete commitments from the rest of the EEC when Britain accepted 200-mile zones in 1976.

While the British industry voiced demands for a 100-mile exclusive zone, UK Fisheries Minister John Silkin refused all offers on quotas made by the rest of the EEC on the grounds that they simply did not give enough on the basis of the criteria set out above. It is, however, worth mentioning that his demands for an exclusive 50-mile limit were more frequent and voluble when addressing the press and the House of Commons than in the EEC Council chamber. To the Council he stipulated only that Britain would accept an exclusive 12-mile zone and dominant preference up to 50 miles. The Irish position was much similar, but the prospect of a British general election in late 1978 and the certainty of one by mid-1979 did not allow much leeway for the British negotiators. It is worth examining at this point just what advantage zones of exclusive or dominant access would give to the UK.

Doubts on value of coastal belts

Some studies have concluded that it would be imprudent to attach too much importance to the size of coastal belts with exclusive access. Neither a 12-mile nor even 25-mile

exclusive belt for the UK would drastically boost British catches of the high-value species, cod and haddock. Compared with no coastal belt at all, a 12-mile belt would provide 2% more cod and 4% more haddock, while a 25-mile belt would give probably 5.5% more cod and 15% more haddock. The influence on catches of saithe and whiting would be greater, where catches could be almost doubled by adoption of a 25-mile belt of exclusive access. However, the latter two species are of lesser interest to the UK than cod or haddock. Moreover, if exclusive zones were adopted by all EEC countries then the British would see a possible drop in plaice catches, a large proportion of which come from within what would become the Dutch coastal belt. An exclusive zone would be valuable, however, for British pelagic fisheries.

Nonetheless, Britain would stand certainly to gain more from an exclusive coastal belt than any other country, none of which takes such a significant proportion of its catch from within the waters around its own coast. What comes as no surprise is that France takes much more inside the UK 12-mile zone than any other member state. Over 1971-75 average French catches inside the British 12-mile zone were 50 000 t, plus a further 22 000 t within the Irish 12-mile zone (see tables). More recently the French themselves reduced these estimates to 45 000 t in the British zone worth Fr 287M in 1980, and only 9 000 t in the Irish zone. The catch value for the UK zone does, however, still seem slightly excessive.

If that fishery within the 12-mile zone were reserved exclusively for Britain catches could be expected to increase by around 4 000 t cod, 5 000 t haddock, 13 000 t whiting and 10 000 t saithe, possibly worth around £11M. Thus the loss to France would be twice as great as the gain to the UK, in strict money terms. This has been reflected in the negotiations hitherto, and there seems little doubt that France and other countries will have to be granted some fisheries within the 12-mile zone on the strength of historic performance. (This argument about relative advantage assumes that catch gained in exclusive zones will be balanced out by cuts in other areas).

Access as way of recouping losses

Whether or not there is a good legal case for claiming zones of exclusive and dominant preference, the concept itself should only be seen as a mechanism for allowing Britain to recoup some of the losses it suffered during the 70s as a result of termination or reduction of access to distant water fishing grounds off Canada, Iceland, Norway and the Faroes. Of course, there is little probability of Britain recovering all those losses from stocks within EEC waters, nor will the species breakdown be the same, nor will the same kind of boats be able to fish them as those that operated earlier in distant waters. But, even on the grounds of maintaining employment in dependent regions alone, there is a case for allotting some compensatory quantities to the UK.

It has been argued in the past that the Germans have sustained equally drastic cuts in distant waters, and yet they have not demanded an exclusive zone, so why should the UK? In 1971-75 Germany took 38% of its catch from its own 12-mile zone, Britain took 64% (and Ireland 82%). If Germany adopted similar demands to those put forward by Britain it would also stand to lose out in other EEC countries' zones, but this would be a loss of very marginal proportions to the UK. So the German case is clear, and German hopes must rest simply on its ability to negotiate a good slice of the cake when the final quota decision is made.

Close access/quotas linkage

So it is clear that access and quotas are not in any way separate issues, but part and parcel of the same question. Apart from its regional aspects, particularly under the Hague concessions, access can in fact be seen as an element of the quota negotiations.

And it is essentially on the question of quotas/access that negotiations in the EEC have foundered for five years now. During that time much ground has been lost on conservation implementation and possible social and marketing policies at Community level. In this stalemate Britain saw appropriate to introduce its own conservation measures on the basis of ICES scientific advice, and the ensuing Court cases (brought because the British government failed to seek Commission approval which was needed after 1976) only served to embitter the talks still further.

Tough line adopted by Conservatives

The arrival of the new British Conservative government on the scene in May 1979 raised hopes in the rest of Europe that agreement might be achieved more easily, given Prime Minister Margaret Thatcher's declared pro-Europeanism. That too has failed to produce a settlement so far, although some progress has been made over the past two years.

Before election the Conservatives had outlined their aim for fisheries policy, and notably absent was any stipulation of an exclusive zone for British fishermen. It was only said that the rights of inshore fishermen should be protected by special measures. However, at the last moment a tougher line was adopted following a visit by Mrs Thatcher to Scotland. Subsequent talks on the CFP have not been so easy as the other member states naively had hoped.

Again it looked in late 1979 as if the questions of quotas/access would dominate the scene, with the other less politically controversial dossiers taking a back seat, although the final form of the latter could be of equal importance to the fishing industry. But on May 30, 1980 the Foreign Ministers of the Nine, meeting in Brussels, gave the fisheries talks yet another injection of "political will". Negotiations for a temporary rebate on Britain's excessive net contributions to the EEC budget resulted in a moderate success for the UK government, but one of the conditions imposed by the other member states was that there be an undertaking to settle the CFP by the end of 1980.

Following is the Council declaration on fisheries policy:

1. The Council agrees that the completion of the common fisheries policy is a concomitant part in the solution of the problems with which the Community is confronted at present. To this end the Council undertakes to adopt, in parallel with the application of the decisions which will be taken in other areas, the decisions necessary to ensure that a common overall fisheries policy is put into effect at the latest on January 1, 1981.

2. In compliance with the Treaties and in conformity with the Council resolution of November 3, 1976 (the "Hague Agreement")this policy should be based on the following guidelines:

(a) rational and non-discriminatory Community measures for the management of resources and conservations and reconstruction of stocks so as to ensure their exploitation on a lasting basis in appropriate social and economic conditions;

(b) fair distribution of catches having regard, most particularly, to traditional fishing activities, to the special needs of regions where the local populations are particularly dependent upon fishing and the industries allied thereto(1), and to the loss of catch potential in third country waters;

(c) effective controls on the conditions applying to fisheries;

(d) adoption of structural measures which include a financial contribution by the Community;

(e) establishment of securely-based fisheries relations with third countries and implementation of agreements already negotiated. In addition, endeavours should be made to conclude further agreements on fishing possibilities, in which the Community - subject to the maintenance of stability on the Community market - could also offer trade concessions.

3. Furthermore, Article 103 of the Act of Accession shall be applied in conformity with the objectives and provisions of the Treaty establishing the European Economic Community, with the Act of Accession, inter alia articles 100-102 and with the Council Resolution of November 3, 1976, in particular Annex VII.

4. The Council agrees to take up again the examination of the proposed regulations under (a) (technical measures of conservation) and (c) (control) at its session on June 16, 1980, and also on this occasion to begin examination of other proposals, including a proposal on quotas for 1980 which the Commission undertakes to present in good time.

Not surprisingly there is again no mention of contribution to resources. And even though there is specific reference to compensation for losses in third country waters, it was thought at the beginning that 100% compensation was totally out of the question. In the event, the compensation first offered to the UK and Germany was about 50% of the actual loss. Commission calculations of losses are reproduced in the following tables.

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(1) Cf. paras 3 and 4 of Annex VII of the Council Resolution of November 3, 1976.

Table 134(a) to (c) Third country losses or gains

The following tables show third country losses or gains as follows:

(a) non-joint stock losses in third country waters;

(b) joint stock losses or gains in ICES divisions IIIa, IIIb, c, d, IV (together with IIIa in some cases);

(c) the net loss or gain when (a) and (b) are aggregated.

N.B. in (a) all losses are included - i.e. no credit is made for any losses that might have arisen from conservation policies;
in (b) only losses or gains which are calculated to be strictly due to jurisdictional changes are included.

(a) Third country losses - average catches 1973-76 compared to catch possibilities 1980 (in tonnes)

	UK	D	F	EEC
Cod				
C 73/76	209 925	72 868	58 530	341 809
CP 1980	16 331	5 737	25 552	48 220
Haddock				
C 73/76	34 408	17 693	4 263	57 360
CP 1980	2 390	480	530	4 000
Saithe				
C 73/76	25 381	65 607	27 465	120 573
CP 1980	2 630	8 674	5 696	17 900
Redfish				
C 73/76	8 028	51 991	639	62 469
CP 1980	5 656	11 749	950	20 450
Herring				
C 73/76	-	23 682	3 231	26 913
CP 1980	-	Nil	Nil	Nil
Plaice				
C 73/76	2 599	-	-	2 599
CP 1980	Nil	-	-	Nil

Notes: Possibilities for Belgium in Icelandic waters included. Haddock in Faroese waters included in Cod figures.

N.B. Details of other third country losses of a relatively small magniture sustained by Member States over the period are not shown in table.

(b-1) Jurisdictional losses or gains in 1980 on joint stocks in ICES IIIa (1) - catch figures compared to TACs - (Base period for calculation of jurisdictional losses or gains is 1973-1976)

	(a) Average total catch 1973-76 all countries t	(b) Average catch 1973-1976 EEC t	(c) % (b) of (a)	(d) Allocation total 1980 (TAC) t (2)	(e) Notional share EEC 1980 (d) x (b) / (a) t	(f) Actual share EEC 1980 t (2)	(g) Jurisdictional loss or gain (f) - (e)
Cod	30 201	26 574	88	33 400	29 392	23 400	- 5 992
Haddock	5 720	5 038	88	6 600	5 808	4 500	- 1 308
Whiting	22 514	22 046	98	22 000	21 560	20 000	- 1 560
Plaice	17 297	17 086	99	24 800	24 552	23 000	- 1 552
Sprat	64 671	53 894	83.3	77 000	64 141	49 000	- 15 141
Herring	113 681	84 229	74	41 400	30 636	18 550	- 12 086

(1) For some species, see table ICES IV (and IIIa)
(2) Reg. 754/80

Jurisdictional losses or gains in 1980 on joint stocks in ICES IIIa. Base period for calculation of jurisdictional losses or gains is 1973-76. Distribution key among Member States is calculated on average catches is 1973-78. Column 1 : percentages 1973-78; column 2 : consequences of jurisdictional changes, in tonnes.

	EEC		B		DK		D		F		NL		UK	
	1	2	1	2	1	2	1	2	1	2	1	2	1	2
Cod		- 5992	0.2	- 12	98.2	- 5884	1.0	-60	-	-	0.6	-34	0.1	-6
Haddock		- 1308	0.9	- 12	98.1	- 1283	0.1	-1	-	-	0.4	-5	0.4	-5
Whiting		- 1560	-	-	99.9	- 1558	-	-	-	-	0.1	-2	-	-
Plaice		- 1552	1.4	- 22	83.7	- 1300	0.2	-3	-	-	-14.6	-227	-	-
Sprat		-15141	-	-	100	-15141	-	-	-	-	-	-	-	-
Herring		-12086	-	-	100	-12086	-	-	-	-	-	-	-	-

(b-2) Jurisdictional losses or gains in 1980 on joint stocks in ICES III b, c, d - catch figures compared to TACs - (Base period for calculation of jurisdictional losses or gains is 1973-1976)

	(a) Average total catch 1973-76 all countries t	(b) Average catch 1973-1976 EEC t	(c) % b of a	(d) Allocation total 1980 (TAC) t (1)	(e) Notional share EEC 1980 (d) x (b) / (a) t	(f) Actual share EEC 1980 t (1)	(g) Jurisdictional loss or gain (f) - (e)
Cod	217 030	89 424	41.2	235 000	96 820	79 700	- 17 120
Plaice	6 466	3 465	53.6	6 295(2)	3 374	4 150	+ 776
Herring	404 875	30 168	7.5	420 200	31 515	28 000	- 3 515
Salmon	2 913	1 315	45.1	1 953(2)	881	1 233	+ 452
Sprat	212 666	9 885	4.6	80 500	3 703	4 900	+ 1 197

(1) Regulation 754/80
(2) Where a Baltic Commission TAC figure is not available for 1980, the 1978 catch figure is used as an estimate.

Jurisdictional losses or gains in 1980 on joint stocks in ICES IIIb,c,d. Base period for calculation of jurisdictional losses or gains is 1973-76. Distribution key among Member States is calculated on average catches is 1973-1978. Column 1 : percentages 1973-78; column 2 : consequences of jurisdictional changes, in tonnes

	EEC		B		DK		D		F		NL		UK	
	1	2	1	2	1	2	1	2	1	2	1	2	1	2
Cod		-17120	-	-	73.7	-12617	26.3	-4503	-	-	-	-	-	-
Plaice		+ 776	-	-	7.7	+ 60	92.3	+ 716	-	-	-	-	-	-
Herring		- 3515	-	-	72.5	- 2548	27.5	- 967	-	-	-	-	-	-
Salmon		+ 452	-	-	4.5	+ 20	95.5	+ 432	-	-	-	-	-	-
Sprat		+ 1197	-	-	93.7	+ 1122	6.3	+ 75	-	-	-	-	-	-

(b-3) Jurisdictional losses or gainsin 1980 on joint stocks in ICES IV (and ICES IIIa in some cases). - catch figures compared to TACs - (Base period for calculation of jurisdictional losses or gains is 1973-1976)

	(a) Average total catch 1973-76 all countries t	(b) Average catch 1973-1976 EEC t	(c) % (b) of (a)	(d) Total TAC 1980 (2) t	(e) Notional EEC share (d) x (b) / (a) t	(f) Actual EEC share 1980 t	(g) Jurisdictional loss or gain (f) - (e) t
Cod	211 566	196 127	92.7	200 000	185 405	179 200	- 6 205
Haddock	191 961	137 254	71.5	69 000	49 335	63 500	+ 14 165
Saithe (1)	249 271	125 908	50.5	129 000	65 158	67 000	+ 1 842
Whiting	165 518	156 043	94.3	105 000	98 989	98 450	- 539
Plaice	114 825	114 408	99.6	116 000	115 578	115 180	- 398
Mackerel (1)	298 408	18 703	6.3	55 500	3 478	6 400	+ 2 922
Sprat	453 921	291 293	64.2	400 000	256 690	311 000	+ 54 310
Norway pout(1)	632 653	340 797	53.9	540 000	290 887	500 000	+209 113
Sandeel (1)	450 265	394 077	87.5	571 000	499 745	526 000	+ 36 235

(1) Including IIIa
(2) Regulation No. 754/80.

Jurisdictional losses or gains in 1980 on joint stocks in ICES IV (and ICES IIIa in some cases). Base period for calculation of jurisdictional losses or gains is 1973-76. Distribution key among Member States is calculated on average catches is 1973-78. Column 1 : percentages 1973-78; column 2 : consequences of jurisdictional changes, in tonnes

	EEC		B		DK		D		F		NL		UK	
	1	2	1	2	1	2	1	2	1	2	1	2	1	2
Cod		- 6 205	4.9	- 304	23.7	- 1 470	11.0	- 683	4.9	- 304	12.6	- 782	42.9	- 2 662
Haddock		+ 14 165	1.5	+ 212	21.4	+ 3 031	2.6	+ 368	3.8	+ 538	1.6	+ 227	69.1	+ 9 789
Saithe (1)		+ 1 842	0.1	+ 2	32.0	+ 589	20.4	+ 376	25.7	+ 473	7.2	+ 133	14.6	+ 269
Whiting		- 539	2.3	- 12	50.3	- 271	0.3	- 2	14.2	- 77	8.0	- 43	24.9	- 134
Plaice		- 398	5.3	- 21	20.5	- 82	4.1	- 16	0.7	- 3	43.2	- 172	26.2	- 104
Mackerel(1)	100%	+ 2 922	0.8	+ 23	70.0	+ 2 045	1.5	+ 44	10.4	+ 304	10.5	+ 307	6.7	+ 196
Sprat		+ 54 310	-	-	70.3	+ 38 180	2.2	+ 1 195	-	-	-	-	27.4	+14 881
Norway pout (1)		+209 113	0.1	+ 209	94	+196 566	-	-	-	-	-	-	5.7	+11 919
Sandeel (1)		+ 26 255	-	-	96.6	+ 25 362	-	-	-	-	-	-	3.4	+ 893

(1) IIIa and IV.

(b-4) Jurisdictional losses or gains in 1980 on joint stocks in NAFO 0-1 - catch figures compared to TACs - (Base period for calculation of jurisdictional losses or gains is 1973-1976).

	(a) Average total catch 1973-76 all countries t	(b) Average catch 1973-1976 EEC t	(c) % (b) of (a)	(d) Allocation total 1980 (TAC) t (1)	(e) Notional share EEC 1980 (d) x (b) / (a) t	(f) Actual share EEC 1980 t (1)	(g) Jurisdictional loss or gain (f) - (e)
Greenland halibut	16 138	4 331	26.8	25 000	6 700	19 650	+ 12 950
Roundnose grenadier	7 664	51	0.7	8 000	56	7 200	+ 7 144
Shrimps	29 675	10 778	36.3	29 500	10 708	22 620	+ 11 912

(1) Regulation 754/80

Jurisdictional losses or gains in 1980 on joint stocks in NAFO 0-1. Base period for calculation of jurisdictional losses or gains is 1973-76. Distribution key among Member States is calculated on average catches is 1973-78. Column 1 : percentages 1973-78; column 2 : consequences of jurisdictional changes, in tonnes

	EEC		B		DK		D		F		NL		UK	
	1	2	1	2	1	2	1	2	1	2	1	2	1	2
Greenland halibut		+12950	-	-	82.9	+10736	17	+2202	-	-	-	-	0.1	+12
Roundnose grenadier		+ 7144	-	-	1	+ 71	99	+7073	-	-	-	-	-	-
Shrimps		+11912	-	-	96.9	+11543	-	-	+ 3.1	+ 369				

(c) Aggregate of (i) third country losses and (ii) joint stock jurisdictional losses or gains. Base period for calculations is 1973/76, tonnes

Species	EEC	B	DK	D	FR	NL	UK
Cod	- 323 024	- 316	- 19 971	- 72 377	- 33 282	- 816	-196 262
Haddock	- 40 503	+ 200	+ 1 748	- 16 846	- 4 271	+ 222	- 22 234
Saithe	- 100 831	+ 2	+ 589	- 56 559	- 21 296	+ 133	- 22 482
Whiting	- 2 091	- 12	- 1 821	- 2	- 77	- 45	- 134
Plaice	- 3 877	- 43	- 1 322	+ 677	- 3	- 399	- 2 703
Mackerel	+ 2 922	+ 23	+ 2 045	+ 44	+ 304	+ 307	+ 196
Sprat	+ 40 366	-	+ 24 161	+ 1 270	-	-	+ 14 881

Aggregate of (i) third country losses and (ii) joint stock jurisdictional losses or gains. Base period for calculation is 1973/76, tonnes

Species	EEC	B	DK	D	FR	NL	UK
Norway pout	+209 113	+ 209	+196 566	-	-	-	+11 919
Sandeel	+ 26 255	-	+ 25 362	-	-	-	+ 893
Redfish	- 42 019	-	-	-40 242	+ 311	-	- 2 372
Greenland halibut	+ 12 950	-	+ 10 736	+ 2 202	-	-	+ 12
Roundnose grenadier	+ 7 144	-	+ 71	+ 7 073	-	-	-
Shrimps	+ 11 912	-	+ 11 543	-	+ 369	-	-

Aggregate of (i) third country losses and (ii) joint stock jurisdictional losses or gains. Base period for calculations is 1973/76, tonnes

Species	EEC	B	DK	D	FR	NL	UK
Herring	42 514	-	14 634	24 649	3 231	-	-
Salmon	452	-	432	20	-	-	-

It will be noted that the compensation is based on jurisdictional losses and excludes so-called conservational losses. This is in practical terms a logical approach, but it should be remembered that where TACs have been cut back in the waters of third countries the EEC fleets have generally suffered a disproportionate share of the burden. Since these criteria were agreed several proposals on quotas have been put forward. In percentage terms the variation from one proposal to another has been minimal, although each time the UK has managed to improve its share of the total availability. The various proposals are reproduced in this chapter.

Mechanism for establishing quotas

The basic mechanism for establishing quotas was originally quite simple. Average catches over the 1973-78 period would be used as a reference. Obviously there were disputes over the reference period. Catches before that period would have benefited the calculation for the UK, but would have worked to the disadvantage of, for example, the Netherlands, which has seen a substantial increase in catches since the early 1970s. There was also argument over the 1973-76 period to be employed for determining third country losses. Catches by the German and British distant water fleets had been higher still in a previous period, inclusion of which would have meant higher compensation for losses, but at the same time would have severely cut back the chances of reaching an agreement. It could also be argued that to include earlier catches would be unjustifiable, since they were higher only be dint of overfishing, according to the Icelanders and Canadians.

The setting down of a fixed mechanism for the calculation of quotas was in itself an achievement. But the disagreements which have arisen since and the ensuing modifications to the calculation serve very well to show just how diverse the EEC fishing industries are. A calculation based on six species was relatively acceptable to Germany and the UK, but not to the Netherlands and Belgium - a much greater part of their catch consists of species outside this bracket - high-value flatfish in particular for the Dutch. At the same time the Irish and Dutch have a special interest in herring for the food fish industry. And, as a direct consequence of the bans on herring fisheries, almost everybody has an interest in the mackerel fishery. The Danes, meanwhile, have a huge fishmeal industry, much to the disgust of the other member states, France in particular. So, as time has gone on, all these elements have been included in the calculation. There has been much argument about what degree of foodfish by-catches in the industrial fishery, if any, should be taken into account when setting quotas.

Meanwhile, an improvement in the level of compensation for third country losses would have meant taking a large portion out of the Belgian allocation, and so the quota proposed for Belgium was left as it would have been had there been only 50%

compensation. At the time of writing, one major flaw remained in the calculation, although previous objections to it have not been voiced for a long time. The base period for calculating catches was 1973-78, but it was stipulated that catches in 1978 above and beyond the Commission's quota proposals for that year should be discounted. This is clearly unfair to the UK - the proposals were never accepted by the UK and were only acceptable to the other eight because they offered so little to the UK.

By the end of 1980 differences between the member states on the quota share-out had been narrowed down substantially, although there is still a great deal of Danish dissatisfaction with the proposed quantities.

Danes unhappy with quotas

The Danes have had their share of the total proposed catch reduced steadily, largely because the sheer size of their fish meal industry gave them a disproportionately large share of the total catch in the initial calculations. Much has been said of the criticism which industrial fishing has attracted, but little has been written of the advantages claimed for it. While critics say that such operations with fine meshes destroy immature food fish such as haddock and cod, the meal industry claims that in keeping stocks of Norway pout, sandeel, blue whiting and horse mackerel down to a reasonable size they are also reducing the number of fish which feed on immature foodfish or deny the latter supplies of plankton as feed.

Effective control needed

Here the case is for effective control rather than for the outright banning of one particular form of operation (although it should be said that fishing for reduction to meal does not create much employment compared with fishing for food fish). The imposition of the so-called "Norway pout box" off North-East Scotland is an example of this kind of patrol. Industrial fishing is banned inside the box, and it has been said that the box has been one of the main factors in causing an increase in availabilities of cod and haddock in the North Sea in 1980.

The Danish industry also argues that to ban industrial fishing would be a waste of valuable protein resources; even to cut its level would not be economically justifiable, so the argument goes, because species such as sandeel have such a short life cycle that to cut effort would simply mean renouncing the opportunity to catch those fish. But whichever way the arguments are seen, it is clear that they each extoll the virtues of their own point of view and that there is really no dialogue. However, no-one has yet proven that industrial fishing does not harm foodfishing, and the latter is clearly more important in terms of income, value added and direct protein availabilities for human consumption, fishmeal being still used largely for production of livestock feed. Moreover, the political consensus is definitely against industrial fishing, and it seems unlikely that much consideration will be given to it when quotas are finally decided. Again there will be compromise.

Compromise on quotas inevitable

It seemed by early 1981 that the final result on quotas would be little different from February 1981 proposals. Of course, no government has yet come forward and agreed unconditionally to the share-out, and additional allocations for Denmark might be needed in the end.

What has become apparent is that the once simple mechanism for setting quotas has become so qualified with conditions, concessions and derogations that the final settlement will almost certainly be determined by each minister's need to return to his capital with figures out of which a victory of sorts can be concocted. Certainly, none of the ministers is likely to be seen as a victor by the industry, but it has been said before that when each of the EEC ministers goes home to face a barrage of criticism then probably the best possible compromise has been reached. Whether a compromise is the best solution for the EEC fishing industry taken as a whole is far from certain.

An agreement on quotas/access will almost certainly signal the end of the CFP negotiations; that will be a political compromise, and unless commensurate attention is paid to the other elements needed to transform a quotas settlement into a truly common policy the CFP will not go far towards solving the present problems of the European fishing industries.

Franco-British access dispute

As far as access is concerned, the battle between the French and the British has resulted in a variety of concessionary proposals to the UK, but none of these has come anywhere close to giving any substantial degree of dominant preference beyond 12 miles except in very limited areas.

Main objections to the idea of the 12-mile exclusive zone have come from the French - as mentioned earlier, their financial interest in this fishery is considerable, but they have preferred to argue their case on the basis of the provisions set down in Article 100-103 of the Treaty of Accession, which are reproduced on pages 147-8. They have reasoned that after the existing derogations expire at the end of 1982 there should be total free access. However, Article 103 gives scope for further derogations, and the latest proposals have allowed for exclusive zones for a further ten years, and the possibility of further restrictions even after that date. (The Hague Agreement in any case does state that a coastal access zone for the UK should be considered).

However, such "exclusive" zones would not be exclusive - there would still be access for foreign vessels, and argument so far has centred upon what degree of foreign access should be allowed. If the status quo is maintained that would be only a victory in principle for the UK, since no increased preference would be assured for fleets in dependent inshore fisheries. However, any reduction in effort would be more than the French could accept as a departure from the stipulations of the Treaty. Again a compromise will be the final solution, and the absence of any provision for reduced effort could hamper any attempts at restructuring.

Box proposal temporarily abandoned

So far the question of access has been linked only marginally with the possibility of effort licencing. At one stage there was talk of licencing larger vessels in a box of uncertain proportions around the Orkneys and Shetlands. The British claimed that this would protect the interests of the inshore fishermen, but the idea fell foul of statistical analyses; most of the inshore fishermen from those islands fish inside the 12-mile zone, and the box would merely have ensured preferential access to middle-water fishermen from constituencies in mainland Scotland with only a marginal Conservative majority. But even if that particular subterfuge has been abandoned, it still seems likely that

political pressure will force the British minister responsible to seek some kind of assurances for the Scottish fishermen in those constituencies.

The talks have also seen some progress on matters of conservation and control/ surveillance. Mesh sizes in line with ICES recommendations are being introduced, and at the same time a more efficient catch reporting system is to be introduced. So far, however, illegal fishing continues, and whether the existence of a Commission watchdog body to ensure national respect for EEC catch controls will be enough to stop this is not clear, especially when Belgium, for instance, does not agree with the concept of quotas in the first place.

TREATY OF ROME

Article 38.

1. The common market shall extend to agriculture and trade in agricultural products. "Agricultural products" means the products of the soil, of stockfarming and of fisheries and products of first-stage processing directly related to these products.

2. Save as otherwise provided in Articles 39 to 46, the rules laid down for the establishment of the common market shall apply to agricultural products.

3. The products subject to the provisions of Articles 39 to 46 are listed in Annex II to this Treaty. Within two years of the entry into force of this Treaty, however, the Council shall, acting by a qualified majority on a proposal from the Commission, decide what products are to be added to this list.

4. The operation and development of the common market for agricultural products must be accompanied by the establishment of a common agricultural policy among the member states.

Article 39.

1. The objectives of the common agricultural policy shall be:

(a) to increase agricultural productivity by promoting technical progress and by ensuring the rational development of agricultural production and the optimum utilisation of the factors of production, in particular labour;

(b) thus to ensure a fair standard of living for the agricultural community, in particular by increasing the individual earnings of persons engaged in agriculture;

(c) to stabilise markets;

(d) to assure the availability of supplies;

(e) to ensure that supplies reach consumers at reasonable prices.

2. In working out the common agricultural policy and the special methods for its application, account shall be taken of:

(a) the particular nature of agricultural activity, which results from the social structure of agriculture and from structural and natural disparities between the various agricultural regions;

(b) the need to effect the appropriate adjustments by degrees;

(c) the fact that in the member states agriculture constitutes a sector closely linked with the economy as a whole.

TREATY OF ACCESSION

CHAPTER 3. PROVISIONS RELATING TO FISHERIES

Section 1. Common Organisation of the Market

Article 98

Articles 51 and 52 shall apply to the guide price for fisheries products. The moves towards price alignment shall be made at the beginning of the fishing year, and for the first time on February 1, 1973.

Article 99

The compensatory amounts shall be corrected, to the extent necessary, by the incidence of the customs duties.

Section 2. Fishing Rights

Article 100

1. Notwithstanding the provisions of Article 2 of Regulation (EEC) No 2141/70 on the establishment of a common structural policy for the fishing industry, the member states of the Community are authorised, until December 31, 1982, to restrict fishing in waters under their sovereignty or jurisdiction, situated within a limit of six nautical miles, calculated from the base lines of the coastal member state, to vessels which fish traditionally in those waters and which operate from ports in that geographical coastal area; however, vessels from other regions of Denmark may continue to fish in the waters of Greenland until December 31, 1977 at the latest.

Member states may not, insofar as they avail themselves of this derogation, adopt provisions dealing with conditions for fishing in those waters which are less restrictive than those applied in practice at the time of accession.

2. The provisions laid down in the preceding paragraph and in Article 101 shall not prejudice the special fishing rights which each of the original member states and the new member states might have enjoyed on January 31, 1971 in regard to one or more other member states; the member states may exercise these rights for such time as derogations continue to apply in the areas concerned. As regards the waters of Greenland, however, the special rights shall expire on the dates laid down for these rights.

3. If a member state extends its fishing limits in certain areas to twelve nautical miles, the existing fishing activities within twelve nautical miles must be so pursued that there is no retrograde change by comparison with the situation on January 31, 1971.

4. In order to permit a satisfactory overall balance of fishing operations to be established within the Community during the period referred to in the first paragraph, the member states need not make full use of the opportunities presented by the provisions of the first subparagraph of paragraph 1 in certain areas of the maritime waters under their sovereignty or jurisdiction.

The member states shall inform the Commission of the measures which they adopt for this purpose; on a report from the Commission, the Council shall examine the situation and, in the light thereof, shall, where necessary, address recommendations to the member states.

Article 101 *

The limit of six nautical miles referred to in Article 100 shall be extended to twelve nautical miles for the following areas:

1. Denmark

- the Faroe Islands
- Greenland
- the west coast, from Thyborøn to Blaavandshuk.

2. France

The coasts of the départements of Manche, Ille-et-Vilaine, Côtes-du-Nord, Finistère and Morbihan.

3. Ireland

- the north and west coasts, from Lough Foyle to Cork Harbour in the south-west
- the east coast, from Carlingford Lough to Carnsore Point, for crustaceans and molluscs (shellfish).

4. United Kingdom

- The Shetlands and the Orkneys
- The north and east of Scotland, from Cape Wrath to Berwick
- The north-east of England, from the river Coquet to Flamborough Head
- The south-west from Lyme Regis to Hartland Point (including twelve nautical miles around Lundy Island)
- County Down.

Article 102

From the sixth year after accession at the latest, the Council, acting on a proposal from the Commission, shall determine conditions for fishing with a view to ensuring protection of the fishing grounds and conservation of the biological resources of the sea.

Article 103

Before December 31, 1982, the Commission shall present a report to the Council on the economic and social development of the coastal areas of the member states and the state of stocks. On the basis of that report, and of the objectives of the common fisheries policy, the Council, acting on a proposal from the Commission, shall examine the provisions which could follow the derogations in force until December 31, 1982.

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* Text as amended by Article 21 of the Adaption Decision.

Table 135. European Commission's quota proposals (July 20, 1980) tonnes

	Cod	Haddock	Saithe		Hake	Plaice	Redfish
Belgium	9 430	470	180	Belgium	2 150	7 487	-
Denmark	149 275	17 787	18 927	Denmark	61 070	46 344	4 500
Germany	42 755	2 178	17 948	Germany	1 080	5 636	39 000
France	23 390	6 980	61 023	France	20 810	3 110	-
Ireland	8 870	3 330	3 200	Ireland	16 240	3 110	2 000
Netherlands	23 190	445	6 795	Netherlands	7 580	61 118	-
UK	104 790	73 310	25 807	UK	60 370	38 465	-
EEC	361 700	104 500	133 880	EEC	169 300	165 270	46 300

The percentages of the total catch possibilities offered to the Member States under the new and old proposals are set out below (for full details see Table 136).

	Old proposals	New proposals
Belgium	2.186	2.12 (-)
Denmark	28.68	29.83 (+)
Ireland	3.41	3.33 (-)
France	12.32	12.22 (-)
Netherlands	8.90	8.60 (-)
West Germany	13.53	12.65 (-)
UK	30.97	31.25 (+)
EEC total	100.00	100.00

Table 136. Effects of applying criteria contained in Council declaration of May 30, 1980 (tonnes cod equivalent)

Species: Cod, haddock, saithe, whiting, plaice and redfish

	EEC	Germany	France	Netherlands	Belgium	UK	Denmark	Ireland
1. 1980 internal catch possibilities based on 1973-1978 average (levelled) and external catch possibilities in 1980	988 795	124 623	144 041	89 985	24 644	273 479	316 295	15 728
2. 1980 internal catch possibilities incorporating the "Hague Agreement amendments" and external catch possibilities in 1980	988 795	114 485	130 536	88 337	23 306	284 950	314 291	32 890
3. Compensatory transfers, third countries, based on arithmetical calculations	-	+ 21 171	- 19 505	- 6 621	- 4 610	+ 48 168	- 38 601	-
4. Commission proposals for 1980 - half of line 3	-	+ 10 585	- 9 752	- 3 311	- 2 305	+ 24 084	- 19 301	-
5. Resulting catch possibilities, i.e. line 2 and line 4	988 795	125 070	120 783	85 026	21 001	309 034	294 991	32 890
Initial proposals	931 838	126 085	114 834	82 935	20 370	288 602	267 263	31 749

Stock			Member State	1980 quotas (tonnes)	
Species	Geographical regions	ICES zone/ ICNAF			
Cod	Baltic	IIIb, c, d (EEC zone only)	Denmark	58 020	
			West Germany	21 680	
			Total EEC	79 700	
Cod	North Sea	IV	Belgium	7 840	1 010 *
			Denmark	40 200	5 160 *
			West Germany	20 070	2 580 *
			France	6 680	860 *
			Netherlands	20 920	2 680 *
			UK	83 490	10 710 *
			Total EEC	179 200	23 000 *

* Of which maximum quantities can be fished in waters under Norwegian jurisdiction.

Stock			Member State	1980 quotas (tonnes)
Species	Geographical regions	ICES zone/ ICNAF		
Cod	West Scotland, Rockall	VI	France	3 600
			Ireland	3 290
			UK	8 050
			Total EEC	15 000
Cod	Bristol Channel West & South Ireland English Channel	VII except VIIa	France	5 900
			Ireland	1 100
			UK	2 000
			Total EEC	9 000
Cod	Irish Sea	VIIa	Ireland	4 520
			UK	480
			Total EEC	5 000

Stock			Member State	1980 quotas (tonnes)	
Species	Geographical regions	ICES zone/ ICNAF			
Haddock	Skagerrak & Kattegat (1)	IIIa	Denmark	3 970 (2)	
			West Germany	530 (3)	
			Total EEC	4 500	
Haddock	North Sea	IV	Belgium	900	220 (4)
			Denmark	16 030	4 010 (4)
			West Germany	2 970	740 (4)
			France	1 420	370 (4)
			Netherlands	1 000	250 (4)
			UK	57 580	14 410 (4)
			Total EEC	79 900	20 000 (4)

(1) Demarcated in the west by a line drawn from the Hanstholm Light House to the Lindesnes Light House, and to the south by a line between the Capes of Hasenøre and Gniben, from Korshage to Spodsbjerg.

(2) This quota may not be caught in the Skagerrak within a 4-mile zone from the base line of Norway and Sweden, and in the Kattegat within a 3-mile zone from the base lines of Sweden.

(3) This quota may not be caught in the Skagerrak within a 12-mile zone from the base lines of Norway and Sweden, and in the Kattegat within a 12-mile sone from the base lines of Sweden.

(4) Of which maximum quantities may be fished in the waters under Norwegian sovereignty or jurisdiction.

Stock			Member States	1980 quotas (tonnes)
Species	Geographical regions	ICES zone/ ICNAF		
Haddock	West Scotland, Rockall	VI	France	1 600
			Ireland	1 900
			UK	12 000
			Total EEC	15 500
Haddock	Irish Sea, Bristol Channel West & South Ireland English Channel	VII	Belgium	100
			France	2 980
			Ireland	1 600
			UK	4 320
			Total EEC	9 000

Stock			Member State	1980 quotas (tonnes)	
Species	Geographical regions	ICES zone/ ICNAF			
Saithe	Skaggerrak & Kattegat* North Sea	IIIa IV	Belgium	160(3)	50(1)
			Denmark	13 380(2)	4 600(1)
			West Germany	14 000(3)	4 800(1)
			France	23 950(3)	8 220(1)
			Netherlands	5 180(3)	1 780(1)
			UK	10 330(3)	3 550(1)
			Total EEC	67 000	23 000(1)
Saithe	West Scotland, Rockall	VI	France	26 840	
			Ireland	1 030	
			UK	11 130	
			Total EEC	39 000	
Saithe	Irish Sea Bristol Channel West & South Ireland English Channel	VII	France	2 210	
			Ireland	2 130	
			UK	540	
			Total EEC	4 880	

(1) Of which the maximum quantities may be fished in the waters under Norwegian sovereignty or jurisdiction.
(2) This quota may not be fished in the Skagerrak within a 4-mile zone from the base lines of Norway and Sweden, and in the Kattegat within a 3-mile zone from the base lines of Sweden.
(3) This quota may not be fished in the Skagerrak within a 12-mile zone from the base lines of Norway and Sweden, and in the Kattegat within a 12-mile zone from the base lines of Sweden.
*) As defined on page 150 under 1)

Stock			Member States	1980 quotas (tonnes)	
Species	Geographical regions	ICES zones/ ICNAF			
Whiting	North Sea	IV	Belgium	3 160	270(1)
			Denmark	48 200	4 160(1)
			West Germany	1 950	170(1)
			France	21 300	1 840(1)
			Netherlands	11 000	950(1)
			UK	53 390	4 610(1)
			Total EEC	139 000	12 000(1)
Whiting	West Scotland, Rockall	VI	Ireland	3 690	
			UK	9 310	
			Total EEC	13 000	

(1) Of which the maximum quantities may be fished in the waters under Norwegian sovereignty or jurisdiction.

Stock			Member States	1980 quotas (tonnes)
Species	Geographical regions	ICES zone/ ICNAF		
Whiting	Irish Sea	VIIa	France	100
			Ireland	8 200
			UK	1 700
			Total EEC	10 000
Whiting	English Channel Celtic Sea West Ireland Bristol Channel	VII (except VIIa)	Belgium	190
			France	10 600
			Ireland	5 610
			UK	1 600
			Total EEC	18 000

Stock			Member States	1980 quotas (tonnes)	
Species	Geographical regions	ICES zone/ ICNAF			
Plaice	Baltic	IIIb, c, d (only EEC zone)	Denmark	3 830	
			West Germany	320	
			Total EEC	4 150	
Place	North Sea	IV	Belgium	5 710	740 (1)
			Denmark	22 220	2 890 (1)
			West Germany	4 630	600 (1)
			France	330	50 (1)
			Netherlands	51 960	6 770 (1)
			UK	30 330	3 950 (1)
			Total EEC	115 180	15 000 (1)

(1) Of which the maximum quantities may be fished in the waters under Norwegian sovereignty or jurisdiction.

Stock			Member States	1980 quotas (tonnes)
Species	Geographical regions	ICES zone/ ICNAF		
Plaice	West Scotland, Rockall	VI	Ireland	650
			UK	1 030
			Total EEC	1 680
Plaice	Irish Sea	VIIa	Belgium	40
			Ireland	1 760
			Netherlands	40
			UK	660
			Total EEC	2 500
Plaice	West Ireland	VII b, c	Ireland	320
			Total EEC	320

Stocks			Member States	1980 quotas (tonnes)
Species	Geographical regions	ICES zone/ ICNAF		
Plaice	English Channel	VII d, e	Belgium	120
			France	1 300
			UK	580
			Total EEC	2 000
Plaice	Bristol Channel South Ireland	VII f, g	Belgium	130
			France	180
			Ireland	270
			UK	120
			Total EEC	700

Table 137. Net results of the presidency proposal compared with the last Commission proposal

	Commission October proposal (6 species) a)		Presidency proposal (7 species) b)		Percentage difference c)
	Tonnes	Per cent *	Tonnes	Per cent *	
Germany	126 998	12.38	145 805	13.02	+ 14.8
France	119 195	11.62	130 489	11.65	+ 9.5
Netherlands	85 874	8.37	87 164	7.78	+ 1.5
Belgium	21 295	2.08	21 307	1.90	+ 0.1
UK	317 570	30.95	394 157	35.19	+ 24.1
Denmark	324 517	31.63	295 159	26.35	- 9.0
Ireland	30 526	2.98	45 917	4.10	+ 50.4
EEC	1 025 976	100.00	1 119 996	100.00	+ 9.2

Footnotes to table:

a) Cod equivalent for cod (1.0), haddock (1.0), plaice (0.1), redfish (0.87), whiting (0.86), saithe (0.77).

b) As for a) plus mackerel (0.30).

c) Between tonnages proposed by presidency and tonnages proposed by Commission.

Table 138. New figures as proposed by the Luxembourg presidency
Species: in tonnes cod equivalent - cod, haddock, saithe, whiting, plaice, redfish, mackerel

	EEC	West Germany	France	Netherlands	Belgium	UK	Denmark	Ireland
Total catch availability according to Commission proposals of October 1980	1 119 996	130 162	137 071	95 458	21 307	364 050	325 827	46 126
Catch possibilities by Member State after correction for transfers under Hague Resolution from EEC, Third Country and joint stock waters	1 119 996	124 995	152 752	93 805	23 244	339 793	339 278	46 131
100 per cent compensation for Third Country jurisdictional losses		+ 21 487	- 22 263	- 6 641	- 4 664	+ 56 199	- 44 119	-
Total 1 + 2	1 119 996	146 482	130 489	87 164	18 580	395 992	295 159	46 131
Compensation to bring Belgian quota back to level of Commission proposal a)		- 677	-	-	+ 2 727	- 1 835	-	- 214
Total for 7 species (lines 3 + 4)	1 119 996	145 805	130 489	87 164	21 307	394 157	295 159	45 917
Percentage of EEC total		13.02	11.65	7.78	1.90	35.19	26.35	4.10

Footnote:

a) Due to small size of the Belgian zone the Belgians are exempted from the need to contribute national resources for the sake of meeting the Hague Resolution terms. So-called net beneficiaries of the proposal on quotas (UK, Germany and Ireland) contribute 2 727 tonnes to Belgium out of their line three total of 588 605 tonnes (contributions as follows - Germany, 677 tonnes; UK, 1 835 tonnes; Ireland, 214 tonnes).

Table 139. Total catches of cod, haddock, saithe, whiting, redfish, plaice and mackerel in ICES and NAFO areas, by EEC member state, in cod equivalent tonnes

Year		1970	1971	1972	1973	1974	1975	1976	1977	1978	Average
Belgium	t	31 095	39 668	40 154	30 752	28 520	26 915	24 453	28 854	27 800	30 913
	%	2	2	2	2	2	2	2	2	2	2
Denmark	t	450 241	309 415	334 844	307 498	406 264	342 051	466 173	333 999	312 669	362 573
	%	23	17	20	19	24	23	28	23	24	22
France	t	265 293	251 917	223 445	221 611	231 174	209 533	208 431	200 758	194 671	222 981
	%	14	14	13	14	14	14	13	14	15	14
Germany	t	319 253	317 339	264 506	269 289	308 283	249 983	266 328	234 377	174 505	267 096
	%	17	18	16	17	18	17	16	16	13	16
Ireland	t	12 745	15 752	15 614	20 447	18 374	19 311	24 869	26 010	24 665	19 754
	%	1	1	1	1	1	1	2	2	2	1
Netherlands	t	106 842	120 840	125 669	106 904	107 500	102 450	97 618	112 397	112 107	110 259
	%	6	7	7	7	6	7	6	8	9	7
UK	t	748 635	719 589	675 884	642 876	596 987	547 162	552 164	500 520	464 851	605 408
	%	39	41	40	40	35	37	34	35	35	37
Total EEC		1 934 104	1 774 520	1 680 116	1 599 377	1 697 102	1 497 405	1 640 036	1 436 915	1 311 274	1 618 983

Sources: ICES and NAFO (ICNAF) published statistics

Table 140. Commission proposal on quotas, 1981 - in cod equivalent by categories

	Category I - seven species cod, haddock, saithe, whiting, plaice, redfish and mackerel	Category II - other human consumption (except herring)	Category III - herring	Category IV - industrial species Norway pout, sprat, horse mackerel, blue whiting
EEC	1 120 000	409 000	92 000	156 400
Germany	148 000	40 000	9 800	10 600
	13.2%	9.77%	10.65%	11.72%
France	152 000	106 000	4 500	11 700
	13.6%	25.91%	4.89%	15.42%
Netherlands	80 000	78 000	8 700	4 600
	7.1%	19.07%	9.45%	9.64%
Belgium	21 000	20 000	500	100
	1.9%	4.88%	0.54%	2.34%
UK	404 000	35 000	15 800	18 300
	36.1%	8.55%	17.17%	26.61%
Denmark	270 000	125 000	40 400	109 700
	24.1%	30.56%	43.91%	30.67%
Ireland	45 000	5 000	12 400	1 400
	4%	1.22%	13.47%	3.59%

Table 141. Commission proposal on quotas 1981 - in cod equivalent by categories - July 1981

	EEC	Germany	France	Nether-lands	Belgium	UK	Denmark	Ireland
Category I - seven species cod, haddock, saithe, whiting, plaice, redfish and mackerel	1 202 800	167 700	157 000	86 000	23 000	433 000	290 000	46 100
%		13.94	13.05	7.15	1.9	36.0	24.11	3.83
Category II - other human consumption (except herring)	431 500	32 100	120 000	78 000	32 000	37 000	136 000	5 400
%		7.44	27.81	18.08	5.33	8.57	31.52	1.25
Category III - herring	116 010	14 920	5 000	9 600	800	35 280	32 120	18 290
%		12.9	4.3	8.3	0.7	30.4	27.7	15.8
Catetory IV - industrial species Norway pout, sprat, horse mackerel, blue whiting	182 240	12 165	11 635	4 630	55	21 255	131 110	1 390
%		6.7	6.4	2.5	-	11.7	71.9	0.7
Total cod equivalent	1 932 550	226 885	293 635	178 230	46 855	526 535	589 230	71 180
%		11.7	15.2	9.2	2.4	27.25	30.5	3.7
Additional data on herring, cod equivalent [2]								
Commission proposal for zone VIa	44 000 [3]	4 920	1 800	2 409	0	29 600	0	6 280
%		11.2	1.8	5.5	0	67.3	0	14.3
Average catch 73-78 for zone VIa [1]	86 254	6 141	1 139	13 265	1.6	57 413	308	7 987
%		7.1	1.3	15.4	-	66.6	0.4	9.3
Commission proposal for zone IVc	15 200	1 800	4 000	7 200	800	1 600	800	0
%		5.3	26.3	47.4	5.3	10.5	5.3	0
Average catch for zone IVc, 1973-78 [4]	3 770	1.8	395	2 036	888	312	138	0
%		-	10.5	54.0	23.5	8.3	3.7	0
Average catch for zones IVa,b,c plus VIId [4]	104 395	3 363	7 979	17 055	890	11 836	63 270	0
%		3.2	7.6	16.3	0.9	11.3	60.6	0

Footnotes:

1) Including Donegal Bay and Clyde stock.
2) Cod equivalent coefficient for herring is 0.8.
3) Amount available to Community. The proposals allocate a furthur 8 000 tonnes cod equivalent to Norway.
4) These figures are intended only as a guide. Previous ICES recommendations were based on the assumption that there was only one North Sea herring stock; this assumption has been dropped this year, since ICES has determined there are in fact three herring stocks (see last issue). Thus is appears that the quota proposals for zone IVc are based not only on national performance during 1973-78 in that zone but also in adjacent zones. Also the disproportionate historic Danish North Sea catch for meal distorts the figures.

15. THE HAGUE AGREEMENT OF 1976

Having accepted inadequate conditions on fisheries in the Treaty of Accession and having then failed to press for changes during renegotiation in 1974-75, the Hague meeting of Foreign Ministers in October 1976 was in effect the last chance the UK had to press for longterm concrete concessions.

Under the ten-year derogation negotiated on Accession, Britain enjoyed a 12-mile exclusive limit (with certain rights for foreign vessels based on traditional activity, see map on page 133, but with the advent of 200-mile zones this was seen, belatedly, as insufficient protection. With emphasis being laid increasingly on near-water fisheries the British industry was out to seek a much larger exclusive zone. However, the government was unwilling to support the industry's demand for a 100-mile exclusive zone. Instead, the then Fisheries Minister John Silkin did demand a 50-mile exclusive zone from the rest of the EEC member states. That demand was backed up by the Irish Republic.

The Irish demands for a 50-mile zone were retained even after the Hague Agreement had been finalised, but have not been pressed subsequently. Instead Ireland received assurances that the aims of the Fisheries Development Programme would be taken into consideration when negotiating quotas. However, the text of the Hague Agreement stipulates that the FDP should only be seen as guidelines for settling quotas and not, as being legally binding upon the Council.

Concessions for UK and Ireland

Certain concessions were given to the UK. These included vague assurances on access and recognised the principle of a "belt of coastal access" for the UK (subsequently the French have been very sensitive about this concession and have never agreed to publication of the full Hague Agreement text as the British have wanted). The concessions were seen by the other member states as giving sufficient safeguards to the British industry, and subsequent demands by Silkin for a 50-mile exclusive zone were met by stubborn and hostile resistance from the rest of the Community, except perhaps Ireland.

It is of course difficult to compare the concessions given to Ireland with those obtained by the UK. It would have been politically impossible to give to either of these two relatively new member states the concession on 50-miles for which they had been holding out. But it was much easier to agree substantial and clearly defined advantages to Ireland with its small and relatively undeveloped fishing fleet than it was to the UK, which accounted for around 20% of Community GRT in 1976 and 13% of all fishing vessels. Ireland only accounted for 2.25% of GRT and took only 1.9% of the total Community catch.

Thus it involved a relatively minor sacrifice on the part of the Continental European states to concede to Ireland that in future negotiations on national quotas the aims of the Fisheries Development Programme be taken into consideration (The Programme called for the doubling of the 1975 Irish catch by the end of 1979). Given the need to develop the backward Irish fleet so that it could profit from the rich surrounding

waters, the concession was justifiable, and at the same time robbed Britain of an important ally in the fisheries access dispute. Since then Irish demands on access have been neither as vigorous nor as convincing as British claims.

Uncertain assurance

No such straight-forward provisions could be made for the UK (and it is worth pointing out that the UK government had in fact no well-defined policy for the fishing industry). The only assurance obtained by the UK was that when considering quotas and other conservation measures "the vital needs of regions particularly dependent on fishing and allied industries ... including northern parts of the United Kingdom" would be taken into account. Here there is planty of room for interpretation, and the definition of what constituted "the northern parts of the UK" for a long time remained unclear. Until the Hague Agreement Britain had been arguing for the 50-mile zone to run adjacent to Hull and Grimsby as well as covering the whole of Scotland. Only in 1980 did the Commission clear up the ambiguity by defining "northern Britain" as Scotland, the English east coast as far south as Bridlington (north of Hull and Grimsby), the Isle of Man and Northern Ireland.

To have included the two main distant water ports of Hull and Grimsby would have opened up the way to similar demands to cover the effects of lost distant water fishing in France and Germany. That was not the direct purpose of the concessions to the UK - they were intended rather as a way of meeting (apparently) some of Britain's demands without going directly against the word of previously laid down policy lines which stipulated equality of access.

The Community pond

The Hague Agreement contained no reference whatsoever to Britain's demand that its contribution to the Community pond be taken into account when settling national quotas. Britain argued that the fish in its share of the EEC 200-mile zone contained around 60-70% of the total EEC catch in the zone. It was added that, assuming the introduction of 200-mile zones by the EEC, than almost the entirety of the UK catch in EEC waters would come from its own zone, whereas the other member states took a large share from what would be the zone of other member states (particularly the UK). Figures released by the Commission in 1976 show the situation in 1973 (see table below).

Table 142. Member state catches in own, other EEC and third country 200-mile zones, 1973

	Total catch	From own 200-mile zone		From other EEC 200-mile zones		From third country waters	
	'000 t	'000 t	%	'000 t	%	'000 t	%
Belgium	49.1	25.8	52.7	15.4	31.4	7.8	15.9
Denmark	1 453.4	991.2	68.2	263.1	18.1	199.1	13.7
Germany	418.2	21.3	5.1	113.3	27.1	283.5	67.8
France	593.9	159.2	26.8	275.0	46.3	159.8	26.9
Ireland	80.1	72.0	89.9	8.1	10.1	-	-
Netherlands	220.4	78.7	35.7	134.9	61.2	6.8	3.1
UK	1 048.7	667.0	63.6	3.1	0.3	378.6	36.1
Italy	289.9	191.0	65.9	-	-	98.9	34.1
EEC	4 153.7	2 205.6	53.1	814.1	19.6	1 134.0	27.3

Source: EEC Commission.

It is also interesting to note that the figures do indicate a much stronger Irish case for preferential access in near-home waters - more than any other member state it took its catch from what would be its own 200-mile zone (89.9%). However, by 1976, British and German catches in third country waters had fallen and were about to fall further, so that their respective catches in their own 200-mile zone represented a greater share of total national catch. This was particularly true for the UK.

The degree to which interpretation of the criteria set down in the Hague agreement has varied can be seen reflected in national positionsin the ensuing Council negotiations on the CFP. In 1980 British Fisheries Minister Peter Walker did in fact criticise the weakness of the Hague concessions to the UK, saying that "the strength of negotiation was thrown away in the talks on 200-mile zones in 1976". This is a specific reference to the Hague meeting and the vagueness of the guarantees obtained by Britain - although it should not be forgotten that Walker comes from the other side of the House from the government which was in power in Britain in 1976.

Rearguard action

If the British government of the day had realised that the longterm yield from any deal with Iceland was doomed to be meagre, given the Icelanders' obvious intention to clear all foreign fishing effort out of its 200-mile zone as quickly as possible, it need not have pressed so strongly for a Community 200-mile zone to be introduced so promptly (upon which further talks with the Icelanders had been made conditional). Seen in this light, the British negotiating position on the CFP has been weakened ever since and transformed into a rearguard action aimed at recouping the maximum possible from the errors of 1976. This is an episode reminiscent of British negotiating on several other issues at EEC level.

The Hague Agreement also gave preferential status to Greenland; this was based partly on its heavy dependence on fisheries but also partly on the Danes' wish to sweeten Community membership for Greenland. Both Greenland and Ireland were assured of finance to improve fisheries patrol facilities.

16. FISHERIES IN AN ENLARGED COMMUNITY

The bulk of this report has dealt with the fishing industries of the northern member states of the existing EEC, not least because they have been most involved in and most affected by the CFP negotiations. However, another dimension is added to the discussion when the southern expansion of the Community is considered, a development which has already begun with the accession of Greece to the EEC at the beginning of 1981. In terms of fisheries the addition of Greece to the Community has not meant significant change so far, but the longterm developments could have more significant implications.

It seems probable that in the near future the heads of state of the Ten will commit themselves to allocating more of the benefits of the EEC to the Mediterranean regions. That could be followed in the mid-80s by the accession of Spain and, later, Portugal to the Community. Together with Italy, and to a lesser extent France, these three countries could bring about a greater emphasis on the problem of fisheries in the south of the Community. Already this trend is becoming apparent in agriculture since the accession of Greece. At the same time fisheries conflicts between these countries, excluding Portugal, could arise in the EEC forum over developments in the Mediterranean. At this point it seems relevant to give a brief analysis of fisheries in Greece and the two applicant countries.

16.1 The Greek fishing industry

The main feature of the Greek fishing industry is that it is largely antiquated, has poor productivity and produces poor quality fish. Production is only around 125 000 t annually, but there has been some improvement in landed tonnage in recent years. Conclusion of fishing deals with Libya, Guinea and Mauretania has added to production possibilities for shrimp, squid and seabream, while shrimp has also been taken off Nigeria. Not all of this fish is sold in Greece but returns instead to the European market, earning valuable foreign currency but not alleviating Greece's national trade deficit in fish and fish products.

The high seas fleet is generally better equipped than the inshore fleet although growth has been impeded by financial, organisational and marketing difficulties. Production by the high seas fleet amounts to around 25 000 t. A further 30 000 t is taken in coastal waters and 60 000 t in the Mediterranean. Major species taken in the coastal and Mediterranean fisheries are sardine, anchovy, picarel, seabream and red mullet. However, the catch of these species has been drastically affected by pollution.

The value of imports is more than double that of export value, according to OECD. Only for shellfish, molluscs and canned fish is the country a net exporter. Main export markets are France, Italy and the Netherlands. Of Greek canned sardines, France takes 10 000 - 16 000 t, Britain 13 000 t, Italy 5 000 t and the US 1 500 t.

Efforts have been under way in recent years to modernise production, both at sea and on land. There have also been extensive attempts to increase and diversify aquaculture output. It seems likely that for all areas of modernisation Greece will be asking for EEC financial backing, although for the time being demands for fishing rights in the

waters of Northern Europe have been dropped. Before Greek accession several market control regulations were dropped, including selling prices and import quotas on some categories. Accession also meant that the distant water fleet will be pressing for a share of EEC quotas in West African countries with which the Community has agreements.

Details of Greek fisheries are included in the tables below.

Table 143. Greece: Fishing fleet according to categories, 1978 and 1979

	1978	1979
Long-distant fishing	46	47
Mediterranean fishing (draggers and engine seiners)	830	835
Coastal fishing (with and without engines, sports vessels etc.)	25 200	25 000
Number of fishermen		
Total number of fishermen	45 500	
Full-time	31 500	
Part-time	14 000	

Source: OECD.

Table 144. Greece: Fishing production, 1978 and 1979

	1978		1979	
	Volume (tonnes)	Value ('000 Dr)	Volume (tonnes)	Value ('000 Dr)
Long-distant fishing	19 000	1 005 000	27 570	1 804 000
Mediterranean fishing (engine draggers and seiners)	59 000		58 000	
Coastal fishing	30 000	4 400 000	30 000	4 400 000
Inland waters (lakes, hatcheries, rivers, aquaculture)	12 000		12 300	713 000
Total	120 000	5 405 000	127 870	6 917 000

Source: OECD.

Table 145. Greece: International trade

	Imports				Exports			
	1.9.77/31.8.78		1.9.78/31.8.79		1.9.77/31.8.79		1.9.78/31.8.79	
	Volume tonnes	Value '000 Dr	Volume tonnes	Value '000 Dr	Volume tonnes	Value '000 Dr	Volume tonnes	Value '000 Dr
Total fish and fish products	30 549	1 556 994	33 511	1 846 783	6 756	497 957	8 912	620 282
Fresh, chilled, frozen fish	2 685	116 768	7 083	384 786	1 104	120 795	721	102 358
Salted, dried, smoked fish	10 540	650 647	12 726	850 800	772	25 846	676	22 208
Shellfish, molluscs (fresh, chilled, salted, frozen)	4 720	245 084	5 680	223 641	3 125	189 309	5 728	303 704
Prepared or canned fish, shellfish and molluscs	12 604	544 495	8 022	387 556	1 755	162 007	1 787	192 012

Source: OECD.

The high seas fleet is generally better equipped than the inshore fleet although growth has been impeded by financial, organisational and marketing difficulties. Production by the high seas fleet amounts to around 25 000 t. A further 30 000 t is taken in coastal waters and 60 000 t in the Mediterranean. Major species taken in the coastal and Mediterranean fisheries are sardine, anchovy, picarel, seabream and red mullet. However, the catch of these species has been drastically affected by pollution.

16.2 The Spanish fishing industry

Of the countries involved in the present round of EEC enlargement, Spain represents by far the greatest problem as far as fisheries is concerned. As an illustration of this it has often been remarked that in terms of tonnage the Spanish fleet is larger than that of the combined French, German, British, Dutch, Belgian and Danish fleets. At first sight this appears a daunting prospect, but the comparison needs putting into perspective.

In structure the Spanish fleet can be compared very roughly with the French fleet; it is dominated in terms of vessel numbers by over 14 000 inshore boats under 50 GRT, out of a total 17 300 vessels. But whereas the large number of vessels under 50 GRT in France accounts for about one-half of fleet tonnage, in Spain the smaller vessels represent only about one-seventh of total tonnage. In Spain there is a large number of middle-sized vessels in the 150-500 GRT range, and it is these vessels, and those even larger, which represent the main problem as far as Spanish accession to the EEC is concerned. Moreover, there is a heavy concentration of these larger vessels in the north and north-west, relatively close to the present EEC zone.

Increasing over-capacity in 150-500 GRT range

Excess capacity in this particular capacity is increasing apace, since distant water fishing rights for cod have been cut drastically over the past three years. According to the trawler owners, these rights have fallen from 300 000 t to 20 000 t, and the problem has been compounded by difficulties with the South African hake fishery and the Mauretanian squid fishery. Some capacity was admittedly taken out of the Spanish fleet several years ago when joint ventures were set up with companies in Venezuela, Argentina and Mexico, but it is now becoming apparent that such ventures do not invariably assure profitability.

In fact the cutbacks Spain has been facing in its distant water fishery stem from the establishment of 200-mile zones in the mid-70s, and are therefore not in essence highly different from those faced by Germany and the UK. Nearer to home Spain has been excluded from Portuguese waters and a further agreement with Morocco was only signed in 1980, the previous agreement having expired in 1969; meanwhile the two countries were involved in a fisheries war of kinds, with Spanish vessels regularly being arrested by Morocco for fishing without licences or with illegal meshes. At least for the smaller vessels the return of peaceable fisheries relations will be welcome, for the Moroccan waters are well stocked and poorly exploited by the Moroccan fleet.

Reputation for reckless fishing

To some extent the Spanish fleet has brought trouble on itself, having built up a well-founded reputation for reckless fishing far beyond quotas. Trouble with Canada has stemmed mainly from such operations, and unlicenced fishing has been carried out in Norwegian, Irish and French waters, too.

There have been attempts to establish fishing agreements with a number of African coastal states, including South Africa, Angola, Equatorial Guinea, Mozambique, Mauretania and Senegal. These agreements could boost supplies of hake, tuna, sardines, squid, horse mackerel etc., but they are unlikely to solve the over-capacity problem altogether. Nonetheless, it cannot be denied that Spain has advanced more

quickly than the EEC in examining new possibilities for distant water fisheries, and it might even be said that opportunities for the EEC had thus been reduced. Since responsibility for third country arrangements was transferred to the Community institutions in 1977 progress for the EEC has been rather slow, although Germany has been examining private arrangements.

Government reluctant to give aid

While it has been possible to maintain the volume of Spanish catch at around 1.2M t, the species breakdown has deteriorated, bringing financial problems to some operators. So far, however, the Spanish government has tried to play down the gravity of the situation. Certainly, it does not want to be drawn into injecting cash in the form of operating subsidies into the industry prior to EEC membership, since the Community has made it clear that there will have to be a drastic cutback in capacity in some sectors of the Spanish fleet. But whether it is a sensible policy simply to let the industry restructure without government intervention is debatable. The Spanish industry has argued in vain for a government-funded restructuring programme. It is unlikely that a fleet trimmed down by the law of the jungle would correspond exactly to the conditions laid down by present EEC members for Spanish entry.

Reduction in EEC zone licences

But while this might be the longterm policy of the government, it has given a reasonable amount of moral and muscle backing to its fleet in its present disputes with the EEC over fishing rights in the Gulf of Gascony. EEC licences for Spanish vessels operating for hake and anchovy in the EEC zone have been cut back from 200 in 1977 to 142 in 1981, and the intention is to cut them back still further. Spain says that as an applicant country it merits special consideration, while the EEC countries and France in particular argue that Spain has only a poor case for requesting fishing rights in the first place since there are no reciprocal provisions for EEC boats. In recent times Spanish gunboats have accompanied unlicenced fishing vessels into the French zone of the Gulf of Gascony, although the French have so far refrained from drastic retaliation for fear of endangering the accession negotiations.

Cash for aquaculture

The government has recently injected cash into aquaculture development, and substantial increases in production are expected. There have for several years been fuel subsidies to the fishing sector.

Data on Spanish catches, trade and fleet are given in the tables below. Imports have risen in recent years, with the EEC supplying increasing quantities of chilled and frozen fish; higher imports of some other categories are also the result of the trade provisions of some bilateral agreements. Main exports from the fishing industry are frozen and canned fish and shellfish and molluscs.

Table 146. Spanish fleet, 1978 and 1979

a) Year	Vessels	GRT	HP	Crew
1978	17 174	785 642	2 730 031	111 006
1979	17 280	761 452	2 711 805	109 581
Change	106	- 24 190	- 28 416	- 1 444

b) Fleet by region	Vessels		Change 1978:1979
	1978	1979	
Cantabria	2 652	2 645	- 7
North-West	5 335	5 352	+ 17
South Atlantic	1 813	1 824	+ 11
Mediterranean	5 477	6 604	+ 27
Canaries	1 897	1 955	+ 58
Total	17 174	17 280	+ 106

c) Crew numbers by region	Crew		Difference
	1978	1979	
Cantabria	19 558	19 285	- 273
North-West	34 807	33 792	- 1 015
South Atlantic	18 066	17 857	- 209
Mediterranean	27 229	27 331	+ 102
Canaries	11 345	11 296	- 49
Total	111 005	109 561	- 1 444

d) Fresher trawler fleet by region	Trawlers		Change
	1978	1979	
Cantabria	328	315	- 13
North-West	468	449	- 19
South Atlantic	637	624	- 13
Mediterranean	1 474	1 477	+ 3
Canaries	81	64	- 17
Total	2 988	2 929	- 59

e) Trawler fleet by GRT group and region	Artisanal		Industrial				Total			
	No.	% a)	No.	% a)	No.	% a)	No.	% a)	No.	% a)
Canatabria	-	-	3	0.9	311	98.8	1	0.3	315	100
North-West	5	1.1	15	3.3	424	94.5	5	1.1	449	100
South Atlantic	84	15	280	44.9	250	40.1	-	-	624	100
Mediterranean	374	25.3	1 027	63.6	75	5.1	-	-	1 477	100
Canaries	2	3.1	12	18.8	50	78.1	-	-	64	100

f) Mediterranean fresher trawler fleet, 1978/79	1978	1979	Change
Number	1 474	1 477	+ 3
GRT	64 702	65 765	+ 1 063
HP	266 389	348 277	+ 92 688

g) Spanish freezer trawler fleet	Vessels	GRT	HP
1977	680	247 325	609 273
1979	661	216 791	589 669
Change	19	30 634	119 604

h) Spanish vessels employed in joint ventures, September 1980	No. of joint ventures	No. of vessels	GRT
Argentina	15	29	42 993
Chile	3	3	4 666
Haiti	1	8	2 860
Morocco	7	13	3 433
Mexico	10	14	9 202
Peru	2	2	2 660
South Africa	1	5	4 796
Uruguay	2	3	2 936
Total	41	77	73 546

i) Spanish distant water cod fleet, 1974 to 1979	1974	1975	1976	1977	1978	1979	Change 1974:1979
Vessels	140	122	-	-	119	108	- 32
GRT	74 920	69 133	-	-	65 841	57 095	- 17 825
HP	151 674	137 030	-	-	131 145	119 535	- 32 139
Crew	3 624	3 238	-	-	3 145	-	- 386a)

a) Difference 1974:1978.

Sources of statistics: Tables a) - g) and i): Spanish Directorate General for Fisheries. Table h): National Association of Joint Venture Trawler Owners.

Table 147. Spain: Fishing fleet and fishermen, 1979 and 1980

	1980		1979	
	Number	Total GRT	Number	Total GRT
(i) Total vessels with engines	17 390	759 421	17 282	762 022
Classification:				
0 - 49.9 GRT *	14 147	111 616	14 027	110 757
50 - 99.9 GRT	1 141	82 289	1 136	81 659
100 - 149.9 GRT	603	74 398	599	73 819
150 - 499.9 GRT	1 356	342 240	1 378	347 310
500 - 999.9 GRT	66	43 299	65	42 536
1 000 - 1 999.9 GRT	70	88 878	70	89 240
2 000 and over	7	16 701	7	16 701
(ii) Total vessels without engines				
(iii) Total commercial fishermen	109 258		109 589	

Source: OECD

Table 148. Spain: Landings and values, 1979 and 1980

	1980		1979	
	Quantity (tonnes landed weight)	Value ('000 000 pesetas)	Quantity (tonnes (landed weight)	Value ('000 000 pesetas)
Total landings	1 134 085	127 610	1 104 025	105 146
For direct human consumption	1 118 708	126 804	1 079 115	103 964
of which: Fish	844 890	82 082	829 399	66 259
Species: Sardine	244 349	3 783	182 459	3 566
Hake	136 624	28 518	132 915	22 607
Horse mackerel	58 123	1 919	65 850	1 411
Anchovy	68 919	5 755	65 053	3 987
Other	356 785	42 107	383 122	34 688
Shellfish	273 818	44 722	249 716	37 705
Species: Crustaceans	48 273	23 607	44 441	21 060
Molluscs	225 545	21 115	205 275	16 645
For other purposes (reduction to meal and oil etc.)	15 377	806	24 910	1 182

Table 149. Spain: Utilisation of catch, 1979 and 1980

How marketed	1980		1979	
	Quantity (tonnes landed weight)	% of total landings	Quantity (tonnes landed weight)	% of total landings
Fresh, chilled (a)	861 238	75.94	821 366	74.40
Frozen (b)	230 532	20.33	236 825	21.45
Salted (c)	26 938	2.38	20 924	1.89
Canned (d)				
Reduction to meal and/or oil, etc. (e)	1 945	0.17	1 417	0.13
Others	13 432	1.18	23 493	2.13
Total	1 134 085	100.00	1 104 025	100.00

(a) Including canning on land. (b) Frozen on board only. (c) Salted on board only. (d) Products for canning are included under "fresh, chilled". (e) Produced on board only.

Table 150 Spain: External trade in fish and fish products, 1979 and 1980

Product groups	Imports				Product groups	Exports			
	1980		1979			1980		1979	
	Quantity (tonnes)	Value ('000 pts)	Quantity (tonnes)	Value ('000 pts)		Quantity (tonnes)	Value ('000 pts)	Quantity (tonnes)	Value ('000 pts)
Total fish and fish products	299 462	39 052 033	265 430	27 479 179	Total fish and fish products	158 326	24 634 484	210 237	27 535 533
Fresh	34 764	5 500 190	17 045	3 063 863	Fresh	5 477	773 277	4 148	707 947
Frozen	147 790	15 090 148	144 825	13 454 265	Frozen	68 785	11 119 863	110 288	15 442 246
Cured	37 872	6 665 494	30 321	3 810 699	Cured	6 928	1 484 508	11 594	1 665 767
Shellfish	51 768	9 687 215	47 564	5 730 511	Shellfish	20 263	1 223 293	18 123	957 362
Canned	4 257	950 044	3 074	621 641	Canned	49 843	9 737 788	57 626	8 546 991
Meal	12 461	263 845	11 285	125 406	Meal	2 050	43 445	-	-
Oil	6 967	214 645	9 079	269 885	Oil	4 859	233 010	3 357	143 769
Other	3 583	680 452	2 237	402 909	Other	121	19 300	101	21 451

Source: OECD

16.3 The Portuguese fishing industry

The Portuguese fleet is characterised, as is the Greek by vast numbers of small inshore vessels accompanied by a handful of large vessels operating often in distant waters. Main distant water fishing grounds are Senegal, Mauretania, Namibia, and the United States, although in the past some fishing has also been carried out off Norway. The African fisheries provide hake and horse mackerel, while fisheries closer to home cover cod, whiting and sardine. There is also considerable production of shellfish, molluscs and cephalopods.

Overfishing in recent years by both foreign and Portuguese vessels in what is now the country's 200-mile zone has made the country even more dependent on rights in distant waters, although the last year has shown signs of a possible recovery in the near-water fishery. Nevertheless, the Portuguese government continues to seek bilateral agreements, with the latest candidate being Guinea-Bissau. Some of these bilateral deals are run on the basis of joint ventures, as with Mauretania, or in return for preferential access to the Portuguese market, as is the case with the US, where the US will obtain preferential access to the stockfish market.

Big modernisation programme

At the same time, Portugal has been involved in a modernisation programme for the fishing and processing sector. Over the past three years over Esc. 4 000M have been injected into the country. This aid covers modernisation and building of vessels, improved marketing services and the upgrading of onshore processing and storage installations. The longterm aim of the modernisation programme is to increase self-sufficiency and reduce costly dependence on imports. Already the country is trying to reduce foreign fishing effort in its EEZ, and has terminated a former exchange agreement with Spain. It should be remembered also that through inclusion of the Azores, Madeira and, further south, Cap Verde, the Portuguese EEZ covers more than 1.5 km^2.

This in itself is likely to cause conflict in the negotiations over Portuguese accession to the EEC. Although talks on the fisheries dossier have only just commenced, the Portuguese government has made it clear that it would strongly favour a clear degree of preference in its own zone. The government has in fact already unofficially likened its position on access to that held by the UK. If, after Portuguese accession catch quotas were to be based on historic performance it would be very much in Portuguese interest to maintain the momentum of fleet expansion at present under way.

Threat from Spanish fleet

However, Portugal's concern over post-entry access to its EEZ is directed less at the present Ten but rather at Spain, which is likely to accede to the Community first. The size of the Spanish fleet is alone cause for concern, but traditional Spanish disregard for conservation measures and quotas could so reduce stocks as to make further expansion of the Portuguese fleet an unviable proposition.

As in Greece, over three-quarters of the catch is for direct human consumption at present. Total catch value is around Esc. 9 000M. The Country is a net exporter, with main export products being canned anchovies, sardines and shellfish. There has

always been a large market for dried and salted fish in Portugal, and large quantities of this are now imported. However, the main item on the import bill is fresh and frozen fish, some of which is used for processing in the absence of adequate domestic supplies of raw material.

Details of Portuguese catches, fleet and trade are given below.

Table 151. Portugal: Fishing fleet and fishermen, 1979 and 1980

	1980		1979	
	Number	Total GRT	Number	Total GRT
(i) Total vessels with engines	5 294	187 794	6 284	199 190
Classification:				
0 - 49.9 GRT	14 808	45 563	17 014	51 049
50 - 99.9 GRT	199	13 294	221	14 766
100 - 149.9 GRT	73	8 451	141	7 818
150 - 499.9 GRT	114	28 073	38	28 172
500 - 999.9 GRT	19	14 272	20	13 982
1 000 - 1 999.9 GRT	49	62 846	48	67 689
2 000 and over	8	22 278	11	24 681
(ii) Total vessels without engines	9 976	6 983	11 209	8 967
(iii) Total commercial fishermen	-		37 422	-

Source: OECD

Table 152. Portuguese foreign trade in fish and fish products, 1979

	Imports		Exports	
	Tonnes	'000 Esc.	Tonnes	'000 Esc.
Production	54 073.5	2 461 193	4 651.7	581 050
Of which:				
Fresh, chilled or frozen fish	48 212.3	1 965 947	3 068.4	399 381
of which: tuna	2 669.3	119 309	47.8	2 914
cod	17 833.5	1 225 159	1.2	28
sardines	10 386.0	206 119	1 045.9	50 343
other fish	17 323.5	416 360	1 973.5	346 096
Salted, dried or in brine	3 604.8	418 130	57.8	9 350
of which: dried cod	3 432.3	405 078	33.3	6 060
fishmeal, for human consumption	172.5	13 052	24.5	3 290
Crustaceans and molluscs, fresh, chilled, frozen or in brine	2 256.5	77 116	1 525.6	172 319
of which: live crawfish and lobster	12.0	3 235	3.7	1 944
live deepwater prawn	75.0	4 065	0	12
other, fresh	991.0	29 352	1 001.6	93 838
deepwater prawn, chilled or frozen	138.0	7 515		
cuttlefish and squid, chilled or frozen	15.2	478	39.4	5 592
other, chilled or frozen	1 005.3	31 783	474.6	70 125
Algae	732.5	32 967	471.8	13 306
Oils and other by-products of fish and other marine life, mostly chilled	4.4	460	5 159.7	114 523
of which: cod liver oil	4.3	355	230.8	7 877
other, unspecified, oils and by-products	0	38	4 928.9	106 464
whale and spermwhale oil	-	-	1 188.4	33 866
Extracts	14.9	2 986	-	-
Preserved and canned products (of fish, including caviar etc.)	10.2	944	33 306.0	3 044 885
of which: tuna	0	4	854.4	138 808
tuna-type products	-	-	473.1	85 950
sardines in olive oil	-	-	9 536.9	903 418
sardines in other oils	5.2	48	13 209.4	993 879
sardines in special sauce	-	-	2 408.9	168 216
anchovy roe	-	-	123.1	23 651
kingmackerel	-	-	3 952.0	402 868
horse mackerel	-	-	430.6	26 517
smelt	-	-	932.4	160 198
anchovies	0	21	450.8	78 544
other sardine-type products	-	-	686.8	44 989
hors-d'oeuvre	-	-	190.0	11 359
fish roe, unspecified	2.5	534	0	15
unspecified, preserved and canned fish	2.5	337	57.6	6 473
Preserved and canned crustaceans and molluscs	7.3	2 361	148.7	14 710
of which: meal not for human consumption	9 188.4	201 699	449.4	7 631
Fish skins	26.5	2 021	1.0	279

Source: Boletim Mensal des Estatisticas da Agriculture et da Pesca.

Table 153. Portugal: Landings and values, 1979 and 1980

	1980a)		1979	
	Quantity (tonnes (landed weight)	Value ('000 escudos)	Quantity (tonnes (landed weight)	Value ('000 escudos)
Total landings	292 258	14 282 120	275 142	11 491 653
For direct human consumption	232 660	13 315 584	206 320	10 488 340
of which:				
Fish	-	-	199 567	9 798 488
Species: Sardine (50 000 t)				
Horse mackerel (40 000 t)				
Whiting (20 000 t)				
Scabbardfish (15 000 t)				
Sardine (107 660 t)				
Shellfish (b)	-	-	6 753	689 852
Species: Crustaceans (278 t)				
(1979) Molluscs (6 475 t)				
For other purposes (c)	59 598	966 536	68 822	1 003 313
Species: Sardine, tuna etc.				

(a) Prov. (b) Crustaceans, molluscs, squid etc. (c) Reduction to meal and oil, animal foods, bait.
Source: OECD.

Table 154. Portugal: Utilisation of catch, 1979 and 1980 .

How marketed	1980		1979	
	Quantity (tonnes)	% of total landings	Quantity (tonnes)	% of total landings
Fresh, chilled	158 939	54.4	147 320	53.5
Frozen	53 838	18.7	45 000	16.4
Salted, dried, smoked	18 883	6.5	14 000	5.1
Canned	53 228	18.2	48 000	17.4
Reduced to meal and/or oil etc.	6 370	2.2	20 822	7.6
Other	-	-	-	-
Total	292 258	100.0	275 142	100.0

Source: OECD

Table 155. Portugal: External trade in fish and fish products, 1978 and 1979

	Imports				Exports			
	1978		1979*		1978		1979*	
	Quantity (tonnes	Value '000 Esc.	Quantity (tonnes)	Value '000 Esc.	Quantity (tonnes)	Value '000 Esc.	Quantity (tonnes)	Value '000 Escs
Total fish and fish products	37 115	1 972 877	108 354	3 067 043	50 304	3 753 208	48 699	4 129 612
of which:								
fresh, chilled and frozen	13 576	881 641	87 448	2 181 586	84	4 502	3 413	125 073
of which: Frozen fillets	93	3 516	13 686	270 651	7	313	12	638
Salted, dried, smoked	7 972	753 694	4 713	503 638	293	31 124	457	2 661
Canned	103	5 074	43	4 017	43 075	3 260 326	37 203	3 450 794
Shellfish (live, fresh, chilled, salted, dried and canned)	1 157	46 308	3 684	123 447	1 962	152 659	1 883	216 164
Meal	12 157	252 373	10 760	238 139	-	-	-	-
Oil	6	558	5	459	3 877	78 517	5 320	124 726
Other	2 144	33 229	1 701	15 757	1 013	228 080	423	210 184

* Provisional.
Source: OECD.

16.4 Enlargement problem needs tackling immediately

Before considering the problems which are presented by enlargement of the Community to Twelve it is worth looking at the size of EEZ which would become available - almost certainly the richest in the world in terms of living resources. The zone could stretch from north of the Shetlands in the north to the Azores in the west and to the Canaries in the south. This would give in theory one of the best opportunities in the world for major fishing nations to cooperate sensibly on conservation, with a good chance of success if sufficient control and surveilance measures were implemented.

But before that can be achieved many practical and political obstacles will have to be overcome. At present it seems that negotiations on fisheries with the two applicant states will be among the last to be dealt with, as was the case with the first enlargement in 1973. The troubles that have arisen from the first enlargement have already been discussed, and it might be well to ensure that there are not similar repercussions from the next enlargement. Spain and Portugal have between them slightly more (145 000) fishermen than the present Community altogether, and there is the danger, with Spain at least, of a situation similar to that which arose in Norway in 1972. Having tried to sew up the fisheries dossier definitively prior to Spanish entry, the Community could find that Spain will not join except under conditions which could necessitate at least a partial renegotiation of the CFP. The fisheries question is of too great importance in employment and thus political terms for a poor deal to be acceptable.

EEC aid for restructuring Spanish and Portuguese fleets ?

So far the Spanish and Portuguese governments have scarcely been involved with the fisheries negotiations. It might be advisable to provide substantial pre-accession aid for the restructuring of both countries' fishing fleets to ease the talks. To argue that it is impossible to do this on the grounds that a structural policy for the EEC has not even been agreed yet is not acceptable. There are clear areas for restructuring of the Spanish fleet. The need to accelerate every possible reduction in Spanish capacity is even greater because the Community has opted for a policy of free access, admittedly with coastal derogations.

However, at present little progress is being made on the Spanish structural question. It is generally thought in the EEC Commission that a special package of structural measures will have to be allocated when Spain finally joins the Community in the mid-eighties. But restructuring is no rapid process, and ideally it would be better that it should be well under way by the time of accession - otherwise there will have to be a long and administratively difficult transitional period to integrate Spain into the CFP. There are, however, considerable political difficulties in allocating restructuring aid to Spain pre-accession, since it would be interpreted in Spain as a sell-out even before joining the Community.

Need for new Spanish fishing grounds

If possible, Spain should be encouraged to advnace as rapidly as possible with its programme of seeking new fishing grounds, since their effort in the present EEC zone will be limited. Previous effort by Spain in this zone has been concentrated in the Gulf of Gascony and off Ireland; the former is unlikely to make substantial concessions to Spain, while the latter will reason that increased Spanish fishing in its EEZ could violate the principles laid down in the Hague Agreement.

Surveillance and control measures should also be aligned pre-accession with EEC standards. In the marketing area the Spanish government has already started this process. These could make for a smooth transition, which is essential for an effective fisheries policy, a precondition of which is stability.

7. SUMMARY AND CONCLUSIONS

TOWARDS A COMMON FISHERIES POLICY

So far this study has examined the main constituents of the fishing industry and trade, the impact of changed conditions over the past 10 years and the attempts so far to adjust or create policy suited to these conditions. Now it remains to be seen just what form a Common Fisheries Policy for the EEC is likely to take and whether it will measure up to the task in hand.

At this point it is perhaps worth re-iterating what such a policy should set out to achieve in the various sectors. As far as the producer is concerned, it should mean that a reasonable level of income is ensured, as enshrined in the Treaty of Rome. Other requirements at producer level are, however, not mentioned by the Treaty, and are no more necessarily compatible with all other aims of a CFP than the first aim mentioned previously. To start with, the policy should aim at stability so as to facilitate investment and marketing decisions - which has not always been the case hitherto. At the same time, such stability should also provide a fair degree of security as regards employment. It should also ensure that there is no distortion of competition between fishermen from different member states carrying out the same kind of operation.

At regional level, the needs of those areas where there is a high degree of dependency on the fishing industry should be taken into account, especially where no other main industries could be established. The collapse of the fishing industry in dependent regions would not only have a huge, unquantifiable human cost, it would also lead to rural depopulation, with the subsequent impact on already overstretched social services in major conurbations.

Needs of consumers

As far as the consumer is concerned, the product should be: reasonably priced; of good quality; fresh; in stable supply; available in wide variety; supplied through an efficient nationwide distribution network; and competitively priced compared with other protein foods. The processor too should have access to regular supplies of reasonably priced raw material. Where possible this should come from the EEC catching industry, but only if the goods can be supplied to meet the processor's requirements.

As far as the Community is concerned, the fisheries regime should be neither excessively costly nor difficult to administer. It should also provide equal benefit to member states where this is appropriate. The abolition of all restrictions on imports is unlikely to be ever possible, but some attempt should be made to balance the principle of Community preference against other important criteria such as the establishment of an efficient industry and the interests of the consumer. Externally, the policy should not provoke trade or other retaliation. Finally, there should if possible be some insulation against distortion through currency fluctuation (although in a technically common market it is difficult to see how this could be achieved without the introduction of "blue" currencies and monetary compensatory amounts - instruments which the EEC is trying to remove at present in agriculture). Regarding fish and stocks, the policy should lead to stabilisation of sustainable yields. There should also be priority for

food fish; if effort can be strictly controlled it should in the long run be possible to encourage growth of stocks of the most required species through multi-species management models which have been developed over the past few years.

It is not hard to see that there is considerable conflict between certain of these criteria. Clearly, equal priority cannot, and should not, be given to all of them (e.g. cheap consumer prices could be achieved through overfishing, but this would endanger longterm incomes, disadvantage dependent areas and invite reproach from countries with whom the EEC shares fishing grounds). Moreover, the various priorities are subject to different rankings in the member states. Such differences are not easily quantified, but a very brief summary of national positions is possible.

17.1 National positions

17.1.1 Germany: With large whitefish and herring processing industries alongside a distant water fleet facing virtual extinction, Bonn has favoured a relatively liberal import regime and the establishment of fishing agreements with third countries, some of which result in concessional trade terms in fish exports for the third country. Here the main example is the (still blocked) agreement with Canada. However, the German government has opposed certain other agreements where the Community simply pays for fishing rights in third country waters. Here the present arrangement with Senegal stands out. This benefits Italy in particular, although there are doubts on the part of the other member states as to whether the returns in fish caught really justify the licence fees. However, since Italy has very few other demands from the CFP (apart from funds for aquaculture development) it seems likely that the northern member states will have to allow this concession as the price for Italian acceptance of any CFP package agreement.

17.1.2 France: Much of this country's attitude has been outlined in previous chapters, but it is worth adding that Paris has taken an increasingly protectionist line on imports from third countries. The consumer has less influence in France than in some other EEC countries, and this attitude would be in keeping with French CAP philosophy, traditionally protecting the small producer. However, under a Socialist government there is perhaps a greater need to provide a satisfactory CFP result for the CGT and CFDT trade unions which represent the onshore and onboard labour of deepwater ports such as Boulogne, where profitability has been hit and inefficiency shown up by sharply increased imports from third countries.

In France there has also been increased pressure for improved withdrawal prices and a highly developed social policy in the fisheries sector. France has also been in the forefront of criticism of industrial fishing carried out mainly by Denmark.

17.1.3 Netherlands: Considerable emphasis in the fishing industry on species outside the bracket of top whitefish species has meant less Dutch involvement in quota disputes than would otherwise be expected. However, this is not the case for herring. Unlike Britain the Netherlands has been able to sustain a substantial demand for herring products (maatjes etc.) on the basis of imported raw material, but the need to supply the processing industry with herring from the Dutch catching industry has never diminished as far as the government's demands on the CFP are concerned. The Dutch government has not been really involved in the access dispute and has so far not taken a tough line in it.

One problem that could arise with the Dutch government in the final settlement is on finance for restructuring of the fleet. In recent years there has been considerable investment in the Dutch fleet for modernisation with the help of government funding, and there could be some reluctance on the part of the Dutch to agree to schemes in other countries which in their view should have been carried out long ago with national finance, as they have done themselves.

17.1.4 Belgium: Although it appears unlikely that Belgium will block any possible final settlement on the CFP, it has taken an increasingly odd line, opposed to all but minimal controls on fishing. Such an irresponsible attitude would only be justifiable if the minute Belgian fleet were the only catcher of fish in the North Sea. Repeated incidents of illegal fishing by Belgian vessels have made few friends for this approach both inside the EEC and outside, particularly in Iceland.

17.1.5 United Kingdom: The key points of this country's attitude have been outlined in previous sections. These include a largely political need for some degree of preferential access and the best negotiable share of quotas. In this study little attention has been paid to the British fishing organisations' demands for a share of quotas (45%) corresponding to resource contribution; this is not because such arguments are regarded as totally invalid, but rather because no CFP would ever be agreed if the British government were to insist on such a share of catch. In addition, percentage breakdown of catch is not indicative of the real worth of national quotas - species breakdown and regional allocation are of equal importance. Officials in the EEC Commission have noted a growing trend on the part of the British government towards protectionist trade policies - this attitude is to some extent supported by the French and thus could lead to the British government advocating less than drastic measures for fleet restructuring.

These are essentially politically based attitudes, reflecting the need to maintain votes in fishing constituencies (the same attitude has been seen previously through fairly indiscriminate payment of subsidies and grants for construction of vessels etc). Furthermore, British acceptance of a fairly slim EEC restructuring budget would have German support. This could be of some tactical importance in the forthcoming negotiations on the restructuring of the entire EEC budget, when the UK will be seeking a further limitation on net payments into the EEC funds (Germany is at present the main net provider of EEC finance). Despite this caution the UK is still likely to seek scrapping premiums for obsolete distant water vessels; this would not endanger any possible support from the German government, since the latter will probably be seeking just the same kind of EEC finance.

17.1.6 Denmark: The emphasis has been on quotas and the industrial fishery (although in the last couple of years there has been government financing to encourage use of whiting for human consumption instead of for fishmeal). So far the quotas proposed by the Commission for the Danes have been trimmed several times, and the Copenhagen government will not be able to agree to any CFP without a better deal on quotas, especially if harsher conditions are imposed on by-catches in the industrial fishery - in mid-1980 the Danish Fisheries Minister remarked that quotas proposed to Denmark for herring were little better than an insult. The Danish government has also been pressing for better deals for Greenland, notably on salmon and shrimp. Nevertheless, it seems almost inevitable that in 1982 Greenland will vote to leave the Community.

Although the country has a strong catching industry it also has a significant processing sector which has been relying increasingly on imported raw material - for this reason the Danes are unlikely to adopt a particularly harsh line on protection against cheap imports from third countries.

17.1.7 Ireland: The Dublin government is mainly concerned with fulfilment of the Fisheries Development Programme, although there are also valid demands for preferential access for the country's predominantly inshore fleet. Continued funding for construction of new vessels is also likely to feature among Irish demands, although recent months have seen a growing reluctance on the part of the other member states to accept perpetual Irish demands for aid, be it for farming or agriculture. For certain products Ireland has demanded protection against imports from third countries, including lobster and salmon.

17.1.8 Italy and Greece: The main interest of these two countries is for structural aids, partly for processing and aquaculture, partly for funding for restructuring of the Mediterranean fleet. Such aid will be their price for settlement of the elements of the CFP which really do not concern them, such as access and quotas. As mentioned previously, they will also be requiring assurances about the continuation of EEC-financed fishing agreements with west African countries.

The points mentioned above are not intended as a comprehensive guide to national positions, but they do give an idea of the possibilities for conflicts and the variety of ways in which the elements of a CFP could be put together. To examine all the possible permutations is not within the scope of this study. However, on the basis of negotiations so far, and information on the development of fleets, trade, catches etc, it should be possible to make some assumptions about the likely final form of a CFP settlement.

17.2 Market organisation

On market organisation it seems that the policy could be a good deal less liberal in its international trade aspect than might be desirable. Political concern in France and the UK over employment and, to a lesser extent, fishing incomes, would be behind this approach although it would do little to provide the basis for a rational long-term solution. In parallel with this, firmer support through withdrawal prices has begun to feature more strongly in the demands of some member states. Germany, on the other hand, could be expected to counter any significant increase in Brussels financing, at least in the short term. The Bonn government has been opposed to a protectionist trade policy, but might have to accept some move in this direction in return for ratification of the still inoperative agreement with Canada. That would provide fishing rights for the German distant water fleet, but would also allow preferential access for quantities of Canadian cod to the EEC market. The chances are that such cod would depress the British market more than the German, and the very possibility of such an agreement one day coming into force has to a large extent been behind the demands for greater protection against imports.

However, the need for such a tight regime might slacken in the medium term. The present worldwide stagnation of whitefish prices (which has also fuelled protectionist arguments) is not certain to last; a possible recovery in the US market could draw

Canadian and Icelandic supplies away from the EEC, and at the same time recent years' overfishing of cod stocks by Iceland could sooner or later lead to a drop in Icelandic exports or at least higher prices. Both of these factors could boost world prices.

Political resistance to restructuring

Nevertheless, a protective market policy would go hand in hand with a less than drastic programme of structural reform. As stated previously, a thorough structural adaptation of the fishing industry could bring employment losses and ought at least to result in certain changes in the modus operandi of an industry founded on a strong sense of tradition. Either way such changes could lead to loss of regional confidence in national governments, and nowhere is this more likely than in the UK. Thus the resistance to restructuring is of a political nature - in economic terms there is little doubting the need for these changes.

However, there are other elements behind opposition to restructuring. Germany in particular is opposed to lavish EEC spending on a general structural policy, but does not dismiss per se the principle of a specific policy. If the Ten were able to agree on a ceiling for German net payments into the EEC budget then Bonn might take a more lenient line on spending. It is too early to say how these budgetary discussions will develop, but Bonn would probably still disapprove of laying-up premiums which are favoured by the French, when scrapping premiums represent a much more effective instrument for altering capacity.

However, if such resistance by Germany results instead in the onus for restructuring falling back on the member states, then distortions will remain, even if the Commission clamps down on national measures which directly boost competitiveness. As we have seen, there has over the past few years been considerable disparity in the ways in which national governments have injected funds into the fishing industry, and policies have been much less discriminate in some countries than in other. Even were spending policies of the member states coordinated there is no guarantee at all that progress would be at the same speed across the Community. Existing differences in efficiency would persist, or even be enhanced, and the common organisation of the market could not (and in principle even should not) be used to prevent national markets from being influenced by exports from other member states - the reference price only applies to imports directly from third countries.

Cost of restructuring industry

There is, however, also the social opportunity cost to be considered in any discussion on structural policy. Complete rationalisation of the industry would probably entail substantial direct and indirect public spending. Not only would there be the cost of restructuring the fleet itself (through scrapping, modernisation and construction aids), there would also be a series of other costs; these could include retraining, job creation, temporary or permanent unemployment benefits, rural depopulation and the subsequent impact on city social services etc. Ultimately these costs would be borne by the taxpayer (consumer), whereas maintenance of an inefficient industry would be borne through the consumer (taxpayer) via higher prices. The main difference between these two options is that the former would be of limited duration, the latter a permanent burden.

In addition, higher prices resulting from a necessary combination of strict controls on import prices and only limited restructuring could affect long-term consumption, resulting in employment losses in processing. It has been reckoned that, for the UK at least, each 1% increase in prices precedes a 0.7% drop in consumption, a sharper decline than for any other comparable protein food. An excessively protectionist attitude towards imports could also jeopardise the Community's chances of negotiating fishing rights in distant waters. However, such opportunities are not great and are in any case unlikely to be of long duration, unless in the form of joint ventures.

17.3 Quotas and access

With so many political considerations involved, it would be imprudent to make forecasts on the precise outcome of the quota/access dispute. If there is agreement (and even that cannot be a certainty after four years of disagreement), then national quotas would probably not be significantly different from those last proposed. There has been much talk of "staying power" for the quota arrangement - that is to say, the percentage share-out by species would act as a template for several years. Obviously, that is a prerequisite for stability and incentive to investment, but it is not perfect.

Given that value ranking for the main species varies from country to country, a reduction in the TAC for saithe or whiting, for example, would have a more serious effect in France than in the UK, while an increase in cod TACs would benefit in particular the UK. Such TAC variations are bound to arise, and the result could be an annual row over the share-out not dissimilar to the long disputes over annual farm price reviews by the agriculture ministers which have sometimes delayed a settlement by two or three months.

A totally rigid system might, in ideal circumstances, be preferable to this chaos, in the hope that over a number of years the temporary advantages for one or other member state would cancel each other out. Politically, however, that is an unacceptable solution. The other way out of the dilemma, would be to tamper with scientific advice, adjusting TACs to engineer a political agreement. Such a suggestion would be met with gasps of horror by the Council, but the practice already exists at EEC level.

Degree of preference likely

On access, too, it is difficult to predict the final result, especially since a trade-off on quotas/access is almost inevitable. The economic significance of "exclusive" zones is at least as great as their political value - their presence for the UK, their absence for the French. What does seem probable is that a degree of preference will be established for dependent areas. In fact, the Hague Agreement allows for just this, but only if the preference were given to inshore and coastal vessels from the region itself, not from the whole of the coastal state. How extensive such preference would be is hard to say, but it is difficult to envisage the French government making major concessions except for regions where there is a clear-cut case of dependence.

But the access argument goes beyond this. If there is no agreement on a CFP by the end of 1982, the provisions of Article 103 of the Treaty of Accession would come into effect. It has been argued by France that after that date the Treaty stipulates that there will be no further derogations on access. But the Treaty states only that "the Council, acting on a proposal from the Commission, shall examine the provisions which

could follow the derogations in force until December 31, 1982". A rollover of present derogations is, however, improbable, not least because it goes against the spirit of Community principles regarding fish as a common resource.

One proposal put forward (but rejected by France) suggested maintaining the 12-mile zone and present levels of fishing share-out, but that the quota for the zones be set by the Commission to maintain the balance. At the time such a solution was unacceptable on constitutional grounds, since it represented a further transfer of legislative power to the Commission.

Commission's trump-card

That was, however, a minor move compared with the constitutional trump-card played by the Commission in July 1981. At that month's Council the Fisheries Commissioner stated:

> "The Council has not reached an agreement on the fixing of the total allowable catches for 1981 and on the associated draft regulation fixing the conditions governing fishing operations when taking the TACs for 1981 or on the distribution among member states of certain catch possibilities in 1981 as proposed by the Commission. The Council has not yet succeeded in exercising the competence to adopt measures relating to the conservation of the resources of the sea which since January 1, 1979 has belonged fully and definitively to the Community.
>
> For its part the Commission recalls, as has been confirmed by the jurisprudence of the European Court in particular in the judgement of May 5, 1981 in Case 804/79, that the Commission has certain rights and duties under Article 155 of the Treaty. In view of the overriding public interest and in a precautionary measure, pending a final decision by the Council, the Commission therefore calls upon all member states in pursuance of their rights and duties to conduct their fishing activities in such a way as to ensure the compliance of vessels, which are flying their flag or are registered in their territory, with the Commission's existing proposals as described above.
>
> The Commission declares its determination to use all the means in its power to ensure the respect by member states of these proposals (on quotas) which it considers in the present situation as being legally binding upon the member states."

That Commission move was based on a European Court of Justice judgement of May, 1981 against the UK on national conservation measures. The ruling implied that all competence for fisheries legislation had definitively passed to the Community since the beginning of 1979, and that, according to the Commission, under Article 155 of the Treaty of Rome, the Commission was empowered to enforce legislation (which would normally accrue to the Council) where otherwise a dangerous legal vacuum would exist.

Just how valid this interpretation is has yet to be fully analysed, but it has been criticised by several member states. The May Court ruling dealt with a conflict between a member state and the Community and not with the balance of competence between the institutions of the Community. Moreover, the Commission move was based not only on the Court ruling but also on the Council decision of June 1979 allocating specific interim legislative power to the Commission. That does not necessarily mean

that the Commission is empowered to impose legislation where no instructions have been given by the Council. Only where the Council gives specific instructions can the Commission temporarily filfil under Article 155 the legislative power normally assumed by the Council.

A de facto precedent

If, however, the Commission move is upheld, the member states could find that it is better to accept a prompt settlement than to have the Commission claiming competence to impose quotas and other measures. Surprisingly, the national governments have watered down their initial objections to the constitutionality of the Commission move; undertakings by the Commission that this acceptance will not jeopardise future negotiations in quotas should be treated with utmost caution, since the incident has provided a de facto precedent. Of course, it would be somewhat difficult for the member states to take the Commission to court over its action - they themselves have broken Community law repeatedly through granting of illegal national aids, over which the Commission has so far refrained from court action in the fear that to do so would only put a CFP settlement even further out of reach.

It is often argued that a prompt agreement would at least restore some international and internal credibility for the Community. Notably, it could improve relations with Norway and Canada, in whose waters the Community would like improved fishing rights or must at least endeavour to maintain existing rights.

Short-sighted reasoning

Such reasoning is rather short-sighted. The Norwegians have made it clear that they will be impressed only by a CFP which functions. The probable outcome which we have outlined is hardly likely to produce such a result. Instead, there will be inadequate restructuring linked with restrictive attitudes on imports, only modest funding of social measures, inadequate consideration of consumer interests and possibly reduced chances of access to third country waters. With persistent overcapacity illegal fishing could still take place, despite adoption of the seemingly toughest control and surveillance measures. Already, while the Commission claims that its data-gathering system is functioning perfectly for the newly re-opened herring fishery, fishermen are claiming that false data is being fed into the machine largely due to connivance of fisheries control officials in some member states. That situation would persist if there were real dissatisfaction with quotas. That is almost certain to happen, and is even more likely if the quotas are set by the Commission and not by Council decision.

What is masked by the numerous acrimonious disputes over detail is that the CFP could offer a unique opportunity for the EEC to act as a true Community. This could be proven by the adoption of a comprehensive and rational long-term agreement on the fisheries dossier. A partial agreement based on a series of compromises would only show yet again that "Community" policy is today created on the principle of the lowest common denominator - short-term national political interest is put before long-term Community interest and short-term losses will not be countenanced even for the sake of long-term gain.

Partial agreement undersirable

Why is a partial agreement so undesirable? Because fisheries resources, unlike agricultural resources, cannot be renewed from year to year through an injection of cash. Fish stocks need prudent and effective management. A European Community of Twelve would be in a position to manage a huge EEZ containing some of the richest fishing grounds in the world. Such stores of protein merit proper management and efficient exploitation. Unless the present "absence of political will" (as former Fisheries Commissioner Finn Olav Gundelach put it in 1980) is remedied the CFP will not be able to achieve this goal. Confrontation over quotas and access has masked the real aim of a Common Fisheries Policy, and reduced the Council to an arena for trials of abstract political strength, with minimal thought being given to the real issues at stake. Fish stocks, however, will not always respond to the exigencies of "the art of the possible".

17.4 Guidelines for an effective CFP

It is not the intention of this report to lay down a comprehensive plan for a fisheries policy, but it is relevant to describe how a CFP could appear if the broader issues were given full consideration.

17.4.1 Quotas

The argument over quotas would still, of course, have to take place, and it would be unrealistic to assume that there will not be frequent quarrels over quotas when annual TACs come to be settled. The only way around such argument would be to have no quotas at all, and instead to enforce rigorous respect of TACs and conservation measures. If this were linked to a liberal markets regime, and if national aids could be brought under strict scrutiny it might be expected that within a relatively short period efficiency would improve, along with quality. But the impact on employment in dependent regions would be disastrous and failure to adopt quotas after five years of bitter dispute would be proof of the Ten's inability to act as a political or even economic unity.

However, in such a hypothetical situation it should be feasible to set TACs at levels determined solely on the basis of scientific advice. This is not the case at present, contrary to popular opinion - mid-year increases in recommended TACs are accepted, but mid-year cutbacks (such as that recommended for North Sea whiting in mid-1980) are rejected on the somewhat spurious grounds that this would upset the fishing industry's catching "plans". Again, such behaviour is typical of the irresponsible attitude being taken by the Council towards the fisheries policy.

Where other changes really could and should be made is in policy on market organisation, restructuring and relations with non-Community countries.

17.4.2 Marketing organisation

On the marketing aspect, the economic situation of the EEC fleet would be better improved through stricter application of quality and grading controls, which is after all one of the reasons why Producer Organisations were established in the first place.

This would bring better prices for fish retailed fresh and could bring the processors back to the quaysides. Admittedly, the grading problem is not of equal magnitude throughout the Community, but in the UK, for example, processors claim that their EEC requirements can be met better by fish caught by Danish vessels, because it is properly graded and presented.

The catching industry, however, is to some extent justified in resisting innovations of this kind. The fish market has always been a buyer's market, and the benefits of improved grading could be expected to accrue to a large extent to the buyer. Overnight there would be little advantage to the producer, but in the long-term better quality should give greater bargaining power to the catching sector, especially if it could learn to cooperate, a multitude of sellers facing only a handful of buyers is never going to get a good deal. Regular landings as well as improved quality could help the producer greatly. Funds available under existing EEC structural schemes could be used increasingly for partial financing of installation of chilled seawater tanks, which could improve landed quality.

It is difficult, however, to see how EEC funds could be used to improve this situation, unless by the wholly unsound method of differential withdrawal prices. Instead in this area some initiative must come from the Producer Organisations, although they could be aided through funds for the establishment of a markets information network at national or preferably EEC level (the German FIMA could perhaps serve as the basic model here).

Stabilising earnings and supplies

Aid could also be allocated to Producer Organisations for short-term freezing and basic processing capability to stabilise earnings and supplies. This stability could then help to indicate regional degrees of excess capacity and inefficiency. At the same time, however, the producer of good quality, graded fish could find the fruits of his labours being taken by the inefficient catcher of persistently poor quality fish. Strict quality controls would have to be imposed by the Producer Organisations to prevent such injustices which would threaten the aims of a stabilising system. To improve fresh sales advertising campaigns could be funded to prevent any further decline in the market share of fresh fish (although the value of taking similar action for the so-called new species is questionable).

As far as the external element of markets policy is concerned great care should be taken to ensure that over-protective checks on imports do not become responsible for retarding necessary changes in the structure of the fleet. Obviously, some protection will be necessary in the medium term until a firm policy of restructuring is under way, but the former should not be used as an excuse to postpone or abandon the latter. It would be inexcusable to clamp down imports of a product where the Community is far short of 100% self-sufficiency.

If within the next three or four years EEC funding does become more generous (perhaps as a result of an increase in the present limit on national contributions based on 1% of VAT revenue) then it might also be worthwhile to consider backing for generic fish publicity campaigns to boost demand for a high quality fresh EEC-caught product (assuming this can be supplied).

17.4.3 Structural policy

On structural policy there is considerable room for innovative Community action. So far it has often been argued that in-depth restructuring cannot take place until quotas and access arrangements are finalised. This is patently nonsense - for the sake of what will almost certainly be minimal EEC finance restructuring has been postponed time and time again, in the UK in particular. If the present British government is truly concerned about its commitment to Europe, it would do well to implement restructuring programmes before a CFP settlement - otherwise ensuing plans will be seen merely as another blow to the British economy at the hands of the European Community.

Nevertheless, there is also the realistic view that a fullscale restructuring policy need not be introduced immediately. As long as national aids could be kept under control and only modest protection against imports were permitted, then the need for adaptation of the fleet could anyway become apparent (and would perhaps already have started) within two or three years, by which time more substantial EEC funds might be available. Politically too this approach might be more acceptable in national capitals. Structural policy should also look to the future by examining ways of inducing adaptation of the Spanish and Portugese fleets before accession. There has been considerable pressure to reduce the structures budget but this is a short-sighted approach. Apart from the need for such a policy, a substantial fund might prove to be the only way to make a settlement acceptable in terms of national politics.

- Finance for joint ventures?

Finance for joint ventures with countries where stocks can meet an existing need might also be considered. Such schemes could prolong an EEC presence in Canada after present fishing rights expire. On the other hand, it is not certain that supplies to the EEC would really benefit from such an arrangement; already it has been argued that German distant water vessels could only continue to operate off Canada with the heavy subsidisation of the multi-national food concerns which own them.

The last three points could well wait for a few years, if to insist on them at this point would endanger a CFP settlement. Of greater political expediency would be provision of EEC funds as a buffer against unemployment resulting from rationalisation of the fleet. Some of this could be allocated through the EEC Social and Regional Funds. The aquaculture and mariculture potential is also worthy of financial aid, both in structural and in social terms. Serious thought should also be given urgently to financing schemes to encourage fuel saving techniques in view of what is already known about the impact of increased fuel prices on operating costs.

At present it seems as if in-depth groundwork on a model for restructuring of the EEC fleet is not ready to form the foundation of a complex policy. However, when this work is complete, the Council should not fail to act on the advice to create an effective and dynamic fleet. This would involve gradual replacement of laying-up premiums by scrapping premiums (although what are effectively temporary operating subsidies could well prove almost impossible to remove at a later stage).

Licensing should be considered

Although it is still tabu in the EEC, the licensing concept should be given serious consideration as a possible linchpin for the various elements of the policy. Accelerated rationalisation and improved control of stocks would be two immediate benefits of such a policy. This assumes, of course, that member state authorities would comply with Community regulations. Without such political will there is little hope of an effective common policy being able to function. Although licensing could work against the interests of certain dependent regions derogation could be established to protect their fishing rights. Indeed, licensing could help ensure that other vessels do not infringe upon their preferential rights in certain waters (as allowed for under the Hague Agreement).

The operation of fishing plans could also be facilitated through implementation of licensing, although again it is likely that parts of the fishing industry would rebel against any imposition of this kind. As was pointed out at the beginning of this report the "hunting" mentality still features strongly in the fishing industry. This, in turn, has meant that competition has remained the dominant motivation, with cooperation being looked upon as a loser's way of making a living. This attitude is patently ridiculous - the factors influencing income go far beyond the quayside and with increased cooperation in the catching sector could begin to work more in favour of the fishermen.

Thus a CFP is not all that can be done for the fishing industry. Much could be achieved without external inducement. However, indiscriminate state cash injections into the industry in the past have perhaps reduced the incentive for such innovation - whenever it is pointed out that certain improvements have been made in one or other member state the typical response from fishing organisations in other member states is to ascribe these achievements to massive government subsidisation. This may be part of the story, but it is certainly not a thorough explanation. Investment has certainly been held up because of failure to agree a CFP, but other changes could have been made and still should be made, such as those described above.

Quotas and access only part of a CFP.

As far as the negotiations on the CFP are concerned, the Council of Ministers would do well to pay greater attention to the policy as a whole. So far it has been said too often that once quotas and access are settled the rest of the policy will fall into place of its accord. This is clearly not the case; quotas and access are only the beginning of a common policy. Unless this is realised the EEC will find itself burdened with a common chaos; the policy will not benefit those who merit it (be it because they are in a dependent region or because they are more efficient), will disregard the interests of the consumer, will deny processors access to vital raw material, and perpetuate present poor EEC management of a vital resource. What is now blamed on the absence of a Common Fisheries Policy will later be blamed on its existence.

APPENDIX I

Table 81 . Imports of major species, 1974/1979

Origin	Imports Volume (tonnes)								
	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Herring (excl. fillet), fresh or chilled, February 15-June 15									
France	337	54			208	13	3		81
Netherlands	285	114	28			123			
Ireland	1 040	51			42		947		
Denmark	14 814	11 411	483		2 290	430			
Norway	420	44	3				1		372
Sweden	25 441	853	96		131	13			24 348
East Germany	3 829								3 629
World	48 213	12 668	663		2 714	601	951	43	28 675
Intra-EEC	18 393	11 654	512		2 583	588	951	43	62
Extra-EEC	29 822	1 013	151		131	13	1		28 513
Class 1	26 111	989	151		131	13	1		24 826
EFTA countries	26 018	949	98		131	13	1		24 826
Class 3	3 710	23							3 687
Herring (excl. fillet), frozen, February 15-June 15									
France	396	101			65	200	30		
Netherlands	1 071	414	38			572	18		29
West Germany	587		13		343	42	13		176
UK	483	152	4		322	5			
Ireland	1 578	447	290		653	126	62		
Denmark	1 614	404	1		1 139	70			
Iceland	1 171	106	222		198	140	506		
Norway	787	211			377	127	65		7
Sweden	259	163			1	1			94
US	3 055	3 007	24		19	5			
Canada	16 290	11 479	1 138		1 359	687	1 579		48
World	27 527	16 660	1 749		4 503	1 989	2 273		353
Intra-EEC	5 754	1 518	384		2 527	1 016	124		205
Extra-EEC	21 774	15 143	1 385		1 976	973	2 149		148
Class 1	21 774	14 143	1 385		1 976	973	2 149		148
EFTA countries	2 416	657	222		597	268	571		101
Herring, fresh or chilled, June 16-February 14									
France	1 346	464			699	100	63		20
Belgium/Luxembourg	228	65	1		161				
Netherlands	835	407	51			376	1		
UK	1 108	497	8		33	4		391	175
Ireland	1 470	42	25		84		1 319		
Denmark	31 618	24 529	1 192		4 770	962	165		
Faroes	847	88							759
Norway	3 064	10	20		20				3 014
Sweden	49 426	2 118	199		164	5	7		46 933
World	90 336	28 221	1 503	38	5 949	1 476	1 555	391	51 203
Intra-EEC	36 768	26 005	1 284		5 765	1 488	1 548	391	307
Extra-EEC	53 569	2 216	220	30	184	8	7		50 896
Class 1	53 393	2 216	220		184	8	7		50 758
EFTA countries	52 545	2 127	220		184	8	7		49 999
Herring, frozen, June 16-February 14									
France	326	146			70	94	16		
Netherlands	1 856	638	243			923	50		2
West Germany	867		79		401	255		17	115
UK	3 327	488	95		2 425	25		18	276
Ireland	5 500	708	378		3 892	380	342		
Denmark	13 211	4 363	75		8 568	205			
Iceland	5 468	338	2 036		251	386	2 451		6
Norway	1 678	492	4		973	75	13		121
Sweden	2 040	607	17		770				645
Finland	419	419							
East Germany	889								889
US	8 556	8 017	39		92	408			
Canada	27 151	17 926	3 027		1 602	836	3 870		90
World	71 320	34 184	5 994		18 857	3 588	6 541	34	2 144
Intra-EEC	25 120	6 363	870		15 170	1 882	408	34	393
Extra-EEC	48 200	27 801	5 124		3 687	1 704	6 133		1 751
Class 1	45 308	27 799	5 123		3 687	1 704	6 133		862
EFTA countries	9 601	1 855	2 057		1 994	460	2 463		772
Class 3	889								889

(continues)

Origin	Imports Value ('000 ECU)								
	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Herring (excl. fillet), fresh or chilled, February 15-June 15									
France	193	36			112	10	3		32
Netherlands	250	94	30			128			
Ireland	619	53			23		543		
Denmark	12 592	9 817	410		1 929	436			
Norway	260	33	2						225
Sweden	11 650	589	87		143	13			10 818
East Germany	1 334								1 334
World	27 129	10 698	568		2 224	806	546	21	12 485
Intra-EEC	13 729	10 014	441		2 081	593	548	21	33
Extra-EEC	13 400	898	127		143	13			12 432
Class 1	12 041	677	127		143	13			11 081
EFTA countries	11 989	642	90		143	13			11 081
Class 3	1 381	9							1 532
Herring (excl. fillet), frozen, February 15-June 15									
France	418	147			59	179	31		
Netherlands	982	330	23			598	14		17
West Germany	484		9		234	39	12		170
UK	287	78	2		203	4			
Ireland	1 338	374	261		540	107	56		
Denmark	1 142	301			779	62			
Iceland	811	77	157		111	104	362		
Norway	719	180			353	124	58		6
Sweden	100	49			1	1			49
US	2 354	2 324	9		16	5			
Canada	12 486	8 749	956		830	560	1 348		45
World	21 221	12 672	1 435		3 151	1 799	1 877		287
Intra-EEC	4 652	1 231	312		1 819	990	113		187
Extra-EEC	16 568	11 441	1 122		1 332	809	1 764		100
Class 1	16 568	11 441	1 122		1 332	809	1 764		100
EFTA countries	1 712	368	157		486	229	418		54
Herring, fresh or chilled, June 16-February 14									
France	728	227			375	71	48		9
Belgium/Luxembourg	169	65	1		103				
Netherlands	718	317	45			354	2		
UK	578	288	1		10	4		197	78
Ireland	956	38	19		53		846		
Denmark	26 625	20 375	1 063		4 098	956	133		
Faroes	456	39							417
Norway	1 702	9	16		24				1 653
Sweden	22 375	1 406	194		173	4	3		20 595
World	54 541	22 765	1 343	88	4 849	1 416	1 030	197	22 853
Intra-EEC	29 845	21 311	1 133		4 852	1 409	1 027	197	116
Extra-EEC	24 896	1 454	210	88	197	7	3		22 737
Class 1	24 550	1 454	210		197	7	3		22 689
EFTA countries	24 104	1 415	210		197	7	3		22 272
Herring, frozen, June 16-February 14									
France	336	175			63	84	14		
Netherlands	1 618	516	141			918	43		2
West Germany	768		72		343	234		13	106
UK	2 748	314	69		2 187	19		7	152
Ireland	4 723	593	327		3 271	343	189		
Denmark	11 034	2 789	45		8 010	190			
Iceland	4 300	284	1 738		206	331	1 736		5
Norway	1 669	478	3		1 037	70	11		70
Sweden	1 042	249	11		585				197
Finland	147	147							
East Germany	290								290
US	6 495	6 109	18		54	314			
Canada	19 670	13 248	2 480		1 249	691	1 942		80
World	54 871	24 915	4 885		17 019	3 193	3 936	21	902
Intra-EEC	21 253	4 398	654		13 888	1 784	248	21	260
Extra-EEC	33 619	20 517	4 231		3 131	1 407	3 690		643
Class 1	33 324	20 515	4 229		3 131	1 407	3 690		352
EFTA countries	7 157	1 158	1 751		1 828	401	1 747		272
Class 3	290								290

(continues)

Origin	Imports Volume (tonnes)								
	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Redfish, fresh or chitted									
France	)67	)28				39			
Nethertands	86	68	8			10			
Denmark	463	452					10		
tcetand	8 027	5 221					804		2
Faroes	! 345	1 184					3		158
Norway	469	404					1		64
Wortd	8 771	7 607	17			70	848		229
tntw-EEC	9)2	787	16			70	39		
Extra-EEC	7 858	8 820					809		229
Ctass 1	7 850	6 812					809		229
EFTA countries	6 499	5 624					804		71
Redfish, frozen									
Denmark	2)1	199					12		
Faroes	304	45							259
Norway	196	176	4				14		2
Wortd	1 181	623	25	10)		4	187		261
tntra-EEC	504	349		101		4	50		
Extm-EEC	677	274	26				117		261
Ctass 1	622	268	4				89		261
EFTA countries	301	206	4				89		2
Cod (exct. fittets), fresh or chilled									
France	457	19			2	31	403		2
Betgium/Luxembourg	6 361	3	2 420		)72		3 619	*	147
Nethertands	28 683	252	7 953			1 526	18 886		67
West Germany	9 197		1 181		1 586	30	1 635		4 768
UK	763	51	38		103	36		130	405
tretand	2 304		6				2 298		
Denmark	29 630	3 312	9 393		1 544	4 980	10 401		
tcetand	15 610	701				1	14 765		143
Faroes	682	67					509		106
Norway	1 227	14	286		2	35	491		399
Sweden	4 581	142	20			1	120		4 478
Potand	5 229	980	342		1 027		310		2 570
Wortd	104 982	5 540	21 648	)	4 435	6 671	53 471	130	13 086
tntra-EEC	77 426	3 637	21 000	1	3 407	6 603	37 263	130	5 385
Extra-EEC	27 558	1 903	648		1 029	68	16 209		7 701
Ctass 1	22 297	923	306		2	37	15 899		5 130
EFTA countries	21 599	856	308		2	37	15 375		5 023
C [ass 3	5 230	980	342		1 027		310		2 571
Cod (exct. ftllets), froze									
Netherlands	247	1	1	77		28	142		
West Germany	1 069		198	52	13	5	738	17	48
UK	89	9	1					36	43
Denmark	2 835	119	41		54	106	2 515		
Icetand	1 087	104	18	27			905	35	
Faroes	465	67					398		
Norway	2 678	3	128	54	4		2 374		115
Sweden	1 199				18		151		1 030
Spain	481			20			481		
Poland	1 659				53		434		1 172
South Africa	1 053			1 053					
Canada	1 584	110	143	220			))))		
St Pierre-Miq	103		103						
Chite	220			220					
Argentina	677			677					
Israel	415			415					
Japan	294		1	291			2		
New Zeatand	158			)36			2)		
World	16 785	499	632	3 396	141	)41	9 380	88	2 508
Intra-EEC	4 370	178	241	140	67	141	3 489	53	* 9)
Extra-EEC	12415	321	39)	3 258	74		5 921	35	2 4)7
Ctass Ï	9 046	313	288	) 799	22		5 444	35	))45
EFTA countries	4 998	136	)44	8)	22		3 435	35	))45
Class 2	1 502	7	)03	1 318					74
Class 3	1 867			139	53		477		))98

Imports
Value '000 ECU)

Origin	EEC-9	West Germany	Fronce	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Redfish, fresh or chi!!ed									
France	220	184				36			
Nether!ands-	100	45	18			39			
Denmark	348	342				3	3		
!ce!and	3 416	3 100					316		
Faroes	808	652					2		154
Norway	334	290							44
Wor!d	5 391	4 741	24			95	330		201
!ntra-EEC	798	685	23			95	12		
Extra-EEC	4 594	4 075	1				317		201
Cias^1	4 575	4 057					317		201
EFTA countries	3 753	3 390					316		47
Redfish, frozen									
Denmark	180	171					9		
Faroes	270	39							231
Norway	147	131	3				11		2
World	932	476	24	68		4	128		233
Intm-EEC	392	257		68		4	63		
Extra-EEC	540	218	24				65		233
Class)	501	215	3				50		233
EFTA countries	210	155	3				50		2
Cod (exc). fillets), fres or chilled									
France	428	16			4	52	351		3
Belgium/Luxembourg	5 212	6	1 945		147		3 007		107
Nether lands	23 934	301	7 012			1 760	14818		43
West Germany	5 716		777		995	34	1 080		2 830
UK	818	31	53		75	79		302	278
Ireland	2 002		8				1 994		
Denmark	35 399	4 119	11 984	1	1 434	8 863	8 998		
Iceland	11 108	382				2	10 631		91
Faroes	485	35					390		60
Norway	1 201	14	303		1	42	503		338
Sweden	2 458	76	26			3	73		2 280
Poland	2 105	439	141		354		110		1 061
World	90 936	5 418	22 257	2	3 010	10 880	41 992	302	7 095
Intm-EEC	73 536	4 473	21 788	1	2 654	10 791	30 265	302	3 262
Extra-EEC	17 398	945	469	1	355	68	11 727		3 833
Class 1	15 273	507	329	1	2	46	11 617		2 771
EFTA countries	14 766	471	329		2	46	11 207		2711
Class 3	2 106	439	141		354		110		1 082
Cod (exc). fillets), froz									
Netherlands	271	2	2	60		46	161		
West Germany	1 270		179	94	25	11	917	25	19
UK	175	9	4					84	78
Denmark	3 341	184	34		35	175	2 913		
Iceland	949	127	14	18			732	58	
Faroes	433	65					368		
Norway	2 251	2	110	48	4		1 996		91
Sweden	536				9		80		447
Spain	350			24			326		
Poland	858				25		249		584
South Africa	427			427					
Canada	1 421	85	130	98			1 108		
St Pierre-Miq	157		157						
Chile	105			105					
Argentina	339			339					
Israel	244			244					
Jcpan	189		1	185			3		
New Zealand	110			93			17		
World	13 808	555	635	1 828	99	239	8 993	187	1 290
Inha-EEC	5 210	248	223	162	61	239	4 070	109	98
Extra-EEC	8 397	307	412	1 667	36		4 923	58	1 192
Class 1	6 703	290	255	893	13		4 651	58	537
EFTA countries	3 757	148	124	66	13		2 813	58	537
Class 2	913	12	157	691					53
Class 3	982			82	25		272		603

Origin	Imports Volume (tonnes								
	EEC-?	West Germany	France	Itaty	Netherlands	Luxembourg	UK	treland	Denmark
Saithe, fresh or chiüed									
France	7 575	5 720			938	39	513		365
Be!gium/Luxembourg	334	172	23		2		118		19
Nether!an&	860	607	130			10	22		91
West Germany	1 454		119	27	133	221			954
UK	264	51	25		186			1	1
Denmark	4 418	3 285	325	47	730	16	15		
!ce!and	4 585	2 888					1 686		11
Faroes	1 140	736					132		272
Norway	2 361	749	479		12	1	55		1 065
Sweden	400	39			2				359
Poland	5 278	271							5 005
Wor!d	28 900	14519	1 106	128	2 017	287	2 642	1	8 203
Intra-EEC	15 024	9 835	626	74	2 002	286	770	1	1 430
Extra-EEC	13 875	4 883	479	52	15	1	1 872		6 773
Class !	8 487	4 412	479		15	1	1 872		1 708
EFTA countries	7 347	3 676	479		15	1	1 740		1 436
Class 3	5 337	271							5 066
Saithe, frozen									
France	209	161			34		14		
West Germany	122			84	18	12	28		
Denmark	270	16			2		252		
Faroes	685	415	42				73		135
Norway	229	23	41				165		
South Africa	1 724			1 724					
Chile	848			848					
Uruguay	817			817					
Argentina	2 037	1	10	2 026					
World	7 278	701	177	5 540	54	13	615		176
Intra-EEC	769	260	85	64	54	13	293		
Extra-EEC	6 508	441	93	5 476			322		176
Class 1	2 755	440	83	1 784			313		136
EFTA countries	302	23	41				238		
Class 2	3 703	1	10	3 692					
Haddock (excl. fillets) fresh or chilled									
France	1 910	60			199	73	1 578		
Belgium/Luxembourg	732		11		1		634		86
West Germany	1 349				312	2	40		995
UK	177				33	2			142
Ireland	111						111		
Denmark	4 255	2 149			1 043	333	730		
Iceland	5 543	288					5 255		
Faroes	418	7					394		17
Norway	2 575	796	8		I	5	15%		239
World	17 397	3 333	25		1 592	420	10 329		1 698
Intra-EEC	8 641	2 235	20		1 592	415	3150		1 229
Extra-EEC	8 759	1 099	6		1	8	7179		489
Class 1	8 633	1 097	6		1	5	7 177		347
EFTA countries	8 214	1 089	6		1	5	6783		330
Haddock (excl. fillets). rozen									
Iceland	287	42					248		
Faroes	510	486	22						2
Norway	1 017	122	3				825		67
World	2 387	673	29		402	21	1187	4	71
Intra-EEC	544	23	3		402	21	91	4	
Extra-EEC	1 844	650	28				1 097		71
Class !	1 830	650	28				1085		69
EFTA countries	1 304	164	3				1070		'67

Imports
Value '000 ECU)

Origin	EEC-9	West Germany	France	Italy	Netherland.	Belgium/ Luxembourg	UK	Ireland	Denmark
Saithe, fresh ör chiüed									
France	4 372	3 351			573	27	229		192
Betgium/Luxembourg	209	110	18		1		65		15
Netheriands	5)5	352	93			9	11		50
West Germany	787		84	47	103	72			481
UK	155	29	20		104			1	1
Denmark	3 367	2 295	345	87	615	17	8		
!ce!and	2 490	1 726					760		4
Faroes	590	395					60		135
Norway	1 6)1	497	404		11	1	56		642
Sweden	312	23			4				285
Poiand	2 029	119							1 910
Wor!d	)⅛ 584	8 900	967	159	1 422	127	1 270	1	3 738
]ntra-EEC	9 503	6 139	563	134	1 407	126	394	1	739
Extra-EEC	7 082	2 762	404	25	15	1	876		2 999
C!ass 1	5 004	2 642	404		15	1	876		1 066
EFTA countries	4 412	2 247	404		15	1	815		930
C!ass 3	2 052	119							1 933
Saithe, frozen									
France	156	98			52		6		
West Germany	104			77	7	3	17		
Denmark	161	17			2		142		
Faroes	389	233	55				42		59
Norway	121	15	30			2	74		
South Africa	731			731					
Chi!e	377			377					
Uruguay	415			415					
Argentina	892	2	7	883					
World	3 537	411	147	2 519	62	7	317		74
intra-EEC	525	181	55	77	61	5	166		
Extra-EEC	3 014	250	92	2 443	1	2	152		74
C!ass 1	1 313	249	85	769		2	149		59
EFTA countries	152	15	30			2	105		
C!ass 2	1 684	2	7	1 674	1				
Haddock (exci. fiüets) fresh orchilled									
France	1 337	49			145	86	1 057		
Betgium/Luxembourg	642		5		3		576		58
West Germany	847				191	2	51		603
UK	118				16	3			99
!re!and	114						114		
Denmark	4 644	2 742			874	456	572		
!ce!and	4 516	190					4 326		
Faroes	315	5					300		10
Norway	2 532	826	6			5	1 672		173
World	15 292	3 851	18		1 233	564	8 558		1 068
Intra-EEC	7 800	2 824	12		1 233	559	2 407		765
Extra-EEC	7 493	1 027	6			5	8 151		304
Class 1	7 435	1 026	6			5	6 148		250
EFTA countries	7 120	I 021	6			5	5 848		240
Haddock (excl. fillets). frozen									
Iceland	220	41					179		
Faroes	434	417	16						1
Norway	923	106	2				757		58
World	1 883	589	23	1	68	23	1 109	10	60
Intra-EEC	281	23	4	1	68	23	152	10	
Extra-EEC	1 603	566	19				958		60
Class 1	1 597	566	19				953		59
EFTA countries	1 143	147	2				936		58

Origin	Imports Vo ume (tonnes)								
	EEC-9	West Germany	France	Italy	Netherlands	Belgiutu/ Iuxembnurg	UK	Ireland	Denmark
Whiting, fresh or chiüed									
France	356	3				10	289		54
Beigium/Luxembourg	911		797		83		49		2
Nether!ands	1 171	129	738			120	126		60
West Germany	609		71		515	1	3		19
Denmark	295	4	196		31	40	24		
Worid	3 619	138	1 822		619	175	628	55	182
!ntra-EEC	3 530	136	1 822		619	175	595	55	137
Extra-EEC	81	2				1	33		45
Whiting, frozen									
Nether!ands	1 068	959	37	3		49			10
West Germany	355		10		20	3	322		
UK	919	19	285		625			10	
Wortd	2 617	1 029	384	70	686	80	341	10	17
!ntra-EEC	2 472	1 029	318	6	686	80	338	10	10
Extra-EEC	145		68	65			8		7
Mackere! (exc!. fiüets), fresh or chitted, February 15-June 15									
France	2 153	420		1 018	505	41	169		
Nethertands	179	123	5			36			15
UK	2 919		2 476	152	285			6 '	
Denmark	787	162	10		12	2	601		
Spain	3 155		2 748	387	20				
Wor!d	10014	734	5 274	1 557	822	84	1 358	6	179
!ntra-EEC	6 148	705	2 526	1 170	802	84	838	6	17
Extm-EEC	3 866	29	2 748	387	20		520		162
C!ass 1	3 865	29	2 748	387	20		520		161
EFTA countries	710	29					520		161
Mackerel (excl. fitlets), frozen, February 15-June 15									
France	302	40		231		31			
Netherlands	4 078	3 076	324	480		91	27		80
West Germany	357			103	26				228
UK	3 876	269	1 098	1 036	284	224			965
Ireland	799	27	208	408	122		34		
Denmark	1 039	988			50	1			
Norway	5 095	2 553			1 257	26	93		1 166
Spain	492	19	473						
USSR	588			588					
World	17 155	7 168	2 103	3 102	1 742	438	183		2 439
Intra-EEC	10 452	4 402	1 630	2 258	481	348	60		1 273
Extra-EEC	6 704	2 766	473	844	1 261	91	103		1 166
Class 1	6 107	2 766	473	257	1 261	91	93		1 166
EFTA countries	5 354	2 747			1 267	91	93		1 166
Class 3	588			588					
Mackerel (excl. fillets), fresh or chilted, June 16-February 14									
France	3 057	288		2 145	793	105	176		
Nethertands	763	557	167	2		31	6		
UK	21 273	32	15 383	505	3 240	5			2 108
Ireland	2 523	24	22		848	162	938		529
Denmark	4 809	3 853	58	2	893	5			
Faroes	27 482						246		27 236
Norway	449	52					86		311
Wortd	61 244	4 819	15 648	2 871	6 070	307	1 452		30 279
Intra-EEC	33 190	4 756	15 648	2 854	6 070	307	1 120		2 637
Extra-EEC	28 084	63		17			332		27 642
Class 1	28 054	63		17			332		27 642
EFTA countries	554	82					86		408

Origin	EEC-9	West Germany	France	Itaty	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
				imports Vatue ('000 ECU)					
Whiting, fresh or chitted									
France	169	6				9	127		27
Betgium/Luxembourg	482		429		29		23		1
Netherlands	618	39	409			73	68		29
West Germany	356		36		309	1	2		8
Denmark	204	3	133		16	41	11		
Wortd	1 978	49	1 027		358	129	309	22	84
tntra-EEC	1 932	49	1 028		358	128	283	22	66
Extra-EEC	46	1				1	26		18
Whiting, frozen									
Netherlands	293	251	20	1		19			2
West Germany	152		3		9	9	131		
UK	530	18	405		92			15	
World	1 163	339	446	45	110	52	150	15	6
tntra-EEC	1 099	339	431	3	110	52	147	15	2
Extra-EEC	63		18	41			3		4
Mackerel (excl. fillets), fresh or chitted, Februtry 15-June 15									
France	1 245	177		829	143	16	80		
Netherlands	109	77	4			23			5
UK	663		520	72	68			3	
Denmark	155	69	8		4	3	71		
Spain	891		665	220	6				
World	3 220	336	1 207	1 121	220	46	217	3	70
Intra-EEC	2 205	323	542	901	214	46	170	3	6
Extra-EEC	1 014	13	665	220	5		46		64
Class 1	1 014	13	665	220	5		44		64
EFTA countries	123	13					46		64
Mackerel (exc). fiHets), frozen, February !5-June 15									
France	125	20		82		23			
Netherlands	1 304	966	75	187		38	11		27
West Germany	127			34	9				84
UK	1 309	98	360	360	74	84			333
Ireland	290	11	79	143	43		14		
Denmark	336	319			17				
Norway	1 868	932			484	9	39		404
Spain	142	9	133						
USSR	210			210					
World	5 908	2 412	647	1 115	632	178	76		948
Intra-EEC	3 491	1 415	514	808	143	145	25		443
Extra-EEC	2 417	997	133	309	48?	33	51		405
Class 1	2 195	997	133	99	48?	33	39		405
EFTA countries	1 950	989			484	33	39		405
Ctass 3	210			210					
Mackerel (excl. fitlets). fresh or chilled, June 16-February 14									
France	2 363	104		1 952	214	36	57		
Nethertands	297	237	41	2		14	3		
UK	4 752	10	3 410	203	665	2			462
tretand	581	8	8		235	38	183		10?
Denmark	1 570	1 267	24	4	271	4			
Faroes	5 844							17	5 827
Norway	135	22					6		107
World	15 674	! 651	3 487	2 172	1 478	93	266		6 527
Intra-EEC	9 657	1 625	3 487	2 160	! 478	93	243		571
Extra-EEC	6 016	26		12			23		5 955
Ctass 1	6 016	26		12 !			23		5 955
EFTA countries	160	25					6		129

Origin	!mports Volume (tonnes							
	EEC-9	West Germany	Fronce	Italy	Netherlands	Belgium/ Luxemboura	UK	Ireland	Denmark
Mackere! (exc!. ft Hets), frozen, June 16-February 14									
France	356	210		69	50	24	3		
Nether!ands	3 325	2 571	167	402		162	23		
West Germany	493		383	18	1				91
UK	7 773	1 262	2 008	962	3 181	62		1	307
!re!and	4 160	1 809	815		1 501	213	22		
Denmark	4 321	3 844	329	40	299	9			
Norway	337	284			40	5			28
World	21 252	9 639	3 703	1 779	5 074	478	80	1	492
!ntm-EEC	20 428	9 287	3 703	1 491	5 031	470	47	1	398
Extra-EEC	826	353		288	43	5	42		94
Class 1	776	352		250	43	5	32		94
EFTA countries	602	286		100	43	5			68
Plaice (exc!. fiüets), fresh or chiüed									
France	185	35			26	6	108		11
Beigium/Luxembourg	5 014	38	6		1 476		2 281	8	1 205
Nether!an&	18 250	1 850	24	1		565	11 519	11	4 280
West Germany	1 884		2		150		15		1 717
UK	358	3			202	28		59	66
Denmark	11 146	4 698	178		2 747	240	3 283		
!ce!and	878	1					877		
Norway	333						331		2
Wor!d	38 134	6 631	209	2	4 810	840	18 478	78	7 288
!ntra-EEC	36 909	6 824	209	1	4 810	840	17 268	78	7 279
Extra-EEC	1 225	7		1			1 208		9
C!ass 1	1 223	6					1 208		9
EFTA countries	1 222	6					1 208		8
P!aice (exci. fiüets), fro									
Be!gium/Luxembourg	107	72					35		
Nether!an&	843	570		100		9	110	15	39
Denmark	330	185	126				18		
!ce!and	597						588		9
Norway	133	5					128		
Wor!d	2 193	838	127	100	50	9	919	31	120
!ntra-EEC	1 448	834	127	100	50	9	180	31	111
Extra-EEC	748	5					732		9
C!ass 1	746	5					732		9
EFTA countries	730	5					716		9
Cod fïüets, fresh or chi!! ed									
Be!g!um/Luxembourg	76	6	32		12		25		1
Nethertands	777	173	369	10		216	9		
West Germany	1 780		1 432		101	81	153		33
Denmark	6410	1 956	1 683	278	1 047	979	467		
Wor!d	9 150	2 139	3 530	287	1 180	1 264	715	20	35
!ntra-EEC	9 126	2 138	3 526	287	1 180	1 263	700	20	34
Extra-EEC	25	3	5			1	15		1
Sea fish fiüets (exc!. cod), fresh or chiüed									
France	660	487			2	138	12	2	39
Be!gium/Luxembourg	95	84	9		'				1
Nether!ands	2 129	931	179	832		154	16		17
West Germany	838		229		157	408	8		36
UK	382	85	145	7	1	12		132	
!re!and	488	57	4		1		426		
Denmark	8 045	7 564	102	101	61	175	42		
!ce!and	133	1				106	27		
Faroes	485	175					2		308
Wor!d	13 433	9 425	884	940	239	991	554	134	466
!ntw-EEC	12 837	9 183	667	940	224	887	506	134	92
Extra-EEC	798	238	17		15	105	49		374
C!ass 1	776	235	17		15	105	49		355
EFTA countries	262	41	17		15	105	37		47

Origin	Imports Value ('000 ECU)								
	EEC-9	West	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Mackere! (exc!. fiüets), frozen, June 16-February 14									
France	134	73		34	15	12			
Nether!ands	1141	871	37	161		64	8		
West Germany	253		197	7					49
UK	2 286	451	616	344	723	25		1	128
!re!and	1 472	552	321		516	74	9		
Denmark	1 478	1 210	137	20	107	4			
Norway	122	99			12	3			8
Wor)d	7 067	3 294	1 309	665	1 373	181	43	1	291
!ntra-EEC	6 766	3 159	1 309	586	1 361	179	17	1	174
Extra-EEC	302	135		98	13	3	26		27
C!ass1	269	135		80	13	3	11		27
EFTA countries	177	107		35	13	3			19
P!aice (exc!. fiüets), fresh or chilled									
France	130	22			13	4	84		7
Beigium/Luxembourg	3 773	31	4		884		1 928	9	917
Nether!an&	15 959	1 752	24	1		620	10 107	13	3 442
West Germany	1 266		1		108		9		1 148
UK	328	2			147	34		93	52
Denmark	10 298	4 567	171		2 223	295	3 042		
!ce!and	676						676		
Norway	296						294		2
Wor!d	32 809	6 381	201	2	3 386	953	16 198	115	5 573
!ntro-EEC	31 824	6 373	201	1	3 386	953	15 228	115	5 567
Extra-EEC	985	8		1			970		6
C!ass 1	982	6					970		6
ECTA countries	981	6					970		5
P!aice (exc!. fiüets), frozen									
Betgium/Luxembourg	150	128					22		
Nethertands	1 336	869		240		19	145	31	32
Denmark	439	335	70				34		
!ce!and	448						442		6
Norway	120	7					113		
Wor!d	2 656	1 343	71	240	33	19	808	60	82
!ntm-EEC	2 076	1 338	71	240	33	19	241	60	76
Extra-EEC	579	7					568		6
C!as$ 1	579	7					666		6
EFTA countries	568	7					665		6
Cod fiüets, fresh or chiüed									
Be!g!un^/Luxembourg	165	13	66		30		54		2
Nether!an&	1 678	338	774	22		627	17		
West Germany	3 193		2 566		184	125	268		50
Denmark	11 992	3 439	3 134	621	1 938	2 064	806		
World	17 220	3 798	6 567	644	2 153	2 724	1 230	51	53
]ntra-EEC	17 180	3 793	6 559	644	2 153	2 723	1 206	51	52
Extra-EEC	40	5	7			2	25		1
Sea ftsh fillets (excl. cod), fresh or chilled									
France	967	624			5	263	15	1	59
Belgium/Luxembourg	207	184	18		4				1
Netherlands	5 334	1 767	529	2 516		450	32		40
West Germany	1 810		412		371	977	17		33
UK	658	107	249	20	2	26		254	
Ireland	851	82	10		1		758		
Denmark	9 665	8 709	175	232	93	354	102		
Iceland	219	3				162	54		
Faroes	851	284					2		575
World	20 766	11 827	1 417	2 769	496	2 232	1 015	258	755
tntm-EEC	19 498	11 475	1 392	2 769	478	2 070	925	255	133
Extra-EEC	1 269	352	25		18	162	90		622
Class 1	1 250	346	24		18	162	90		610
EFTA countries	356	46	24		18	162	71		35

Table 81 . imports of major species, 1974/1979, (continued)

Origin	Imports Volume (tonnes)								
	EEC-9	West Germany	France	Italy	Nethertands	.uxemboura	UK	Ireland	Denmark
Cod fiüets, frozen									
Prance	2 404	565			23	1))	1 703		2
Be!gium/Luxembourg	1 747	38	82		1 499		128		
Nether!ands	344	26	41	)		21	255		
West Germany	21 408		8 318	307	1 703	4 383	6 848		49
UK	204	10	21	1	26			146	
!re!and	67						67		
Denmark	6 736	808	183	384	8	56	5 497		
!ce!and	)2 702	25	110			571	11 998		
Faroes	2 369	21	318				2 029		1
Norway	29 803	939	293	20	336	)47	28 009		59
Sweden	130	2	120				8		
Spain	)74		152		11		11		
Po!and	74								74
Canada	2 639	331	193				2 115		
Greentand	194	16							)78
S.Pierre-Miq.	86		86						
Argentina	) 250	60	237	953					
Japan	87	41	21				25		
Wor!d	82 511	2 684	10210	) 667	3 610	5 290	58 511	146	393
!ntra-EEC	32 913	) 249	8 645	693	3 259	4 572	14 298	146	8)
Extra-EEC	49 598	) 435	1 565	974	351	7)8	44 213		342
Class 1	47 955	) 359	1 241	20	351	7)8	44 205		6)
EFTA countries	42 635	966	523	20	336	7)8	40 013		69
C!ass 2	1 531	76	324	953					178
C!ass 3	112						8		)04
Saithe fiüets, frozen									-
France	1 368	) 357			6	5			
Be!gium/Luxembourg	1 218	3	66		1 149				
West Germany	3 317		1 130	233	679	1 148	109		20
UK	169	137	16					14	
Denmark	1 655	) 548	29	78	2				
!ce!and	720	347				79	294		
Faroes	6 536	5 226	1 126			96	48		40
Norway	3 810	699	500	40	194	33	2 343		1
Argentina	1 642		10	1 632					
Wor!d	20 595	9 329	2880	2 080	2 035	1 385	2 029	)4	63
!ntm-EEC	7 763	3 052	1 244	311	1 836	1 177	109	14	20
Extra-EEC	12 833	6 277	) 636	1 749	199	208	2 721		43
C!ass 1	11 152	6 277	1626	117	199	208	2 684		41
EFTA countries	4 529	1 046	500	40	194	112	2 636		1
C!ass 2	1 642		)0	1 632					
Haddock fiüets, frozen									
France	65					1	64		
Be!gium/Luxembourg	69	5			64				
West Germany	288		50		202	24	12		
Denmark	113	6					107		
!ce!and	2 830		44			12	2 774		
Faroes	1 754	8	683			97	966		
Norway	7 215	130	407		87	6	6 436		)49
Wortd	12 400	155	) 186		353	143	10 361	)4	)99
!ntra-EEC	562	17	60		267	29	185	)4	
Extra-EEC	11 839	138	1 134		87	115	10 176		)89
C!ass 1	11 799	)38	1)34		87	115	10 178		149
EFTA countries	10 044	130	45)		87	17	9 210		149
Redfish fiüets, frozen									
West Germany	511		322	29	5	139	16		
Denmark	56	54				2			
!ce!and	289	281					8		
Faroes	202	194					4		
Norway	166	53			60		52		1
Wor!d	1 334	645	329	29	65	158	81		27
!ntra-EEC	653	116	329	29	5	158	16		
Extra-EEC	680	529			60		64		27
C!ass 1	657	628			60		64		5
EFTA countries	456	335			60		60		1

Imports
Vatue '000 ECU)

Origin	EEC-9	West Germany	France	Italy	Netherlands	Betgiurr/ Luxembourc	UK	treland	Denmark
Cod fiUets, frozen									
France	3 832	904			38	237	2 650		3
Be!gium/Luxembourg	3 860	79	170		3 424		187		
Netherlands	5)5	65	66	2		43	339		
West Germany	37 65)		14 263	527	3 470	8 278	11 048		67
UK	478	22	42	2	52			360	
!re!and	)25						125		
Denmark	11 972	1 075	327	774	15	107	9 574		
!ce!and	21 409	46	174			681	20 508		
Faroes	4 603	32	512				4 058		1
Norway	54 651	1 590	725	43	743	313	51 124		113
Sweden	316	6	298				12		
Spain	231		197		17		17		
Po!and	109								109
Canada	3 357	543	198				2 616		
Green!and	392	27							365
S.Pierre-Miq.	151		151						
Argentina	1 017	51	229	737					
Japan	112	42	34				36		
Wor!d	144 888	4 488	17 430	2 086	7 766	9 660	102 412	380	696
!ntm-EEC	58 437	2 150	14 867	1 306	8 998	8 666	24 021	380	70
Extm-EEC	86 450	2 338	2 563	781	767	994	78 391		616
C!ass 1	84 748	2 260	2 182	43	767	994	78 386		114
EFTA countries	76 376	1 642	1 197	43	743	894	71 644		113
C!ass 2	1 561	78	381	737					365
C!ass 3	143						5		138
Saithe fiüets, frozen									
France	1 681	1 687			9	5			
Be!gium/Luxembourg	2 189	3	111		2 075				
West Germany	4 327		1 456	363	986	1 368	130		24
UK	215	172	22					21	
Denmark	2 110	1 906	24	177	3				
!ce!and	840	428				92	322		
Faroes	7 896	6 214	1 478			110	54		40
Norway	4 320	802	663	70	310	37	2 437		1
Argentina	1 242		8	1 234					
Wortd	25 004	11 208	3 782	1 931	3 403	1 653	2 900	21	68
Intra-EEC	10 576	3 762	1 613	540	3 072	1 414	130	21	24
Extm-EEC	14 428	7 448	2 149	1 390	331	240	2 830		42
C!ass 1	13 169	7 446	2 142	156	331	240	2 813		41
EFTA countries	5 159	1 228	663	70	310	129	2 758		1
C!ass 2	1 242		8	1 234					
Haddock fiüets, ürozen									
France	120					1	119		
Be!gium/Luxembourg	181	11			170				
West Germany	538		53		419	33	23		
Denmark	243	6					237		
!ce!and	5 400		73			18	5 309		
Faroes	3 257	12	1 199			151	1 895		
Norway	13 549	238	886		204	13	11 946		262
World	23 400	290	2 222		794	225	19 533	33	303
)ntm-EEC	1 150	39	63		590	43	382	33	
Extra-EEC	22 249	251	2 158		204	182	19 151		303
Ctass 1	22 208	251	2 158		204	182	19 151		262
EFTA countries	18 950	238	959		204	31	17 256		262
Redfish fitlets, frozen									
West Germany	727		448	44	12	205	20		
Denmark	108	104				4			
Icetand	468	456					12		
Faroes	286	274					5		7
Norway	279	75			141		62		1
World	2 065	1 044	455	44	153	236	99		32
tntra-EEC	1 004	235	455	44	12	238	20		
Extra-EEC	1 061	809			141		79		32
Class 1	1 034	806			141		79		8
EFTA countries	747	531			141		74		1

Origin	Imports Vc lume (tonne 1								
	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Mackeret fittets, frozen									
UK	1 090	837			4	6		3	240
tretand	! 282	1 151	20		50	19	42		
Denmark	1)89	1 155			7	2	25		
Wortd	3 89!	3 295	24	9	83	28	87	3	381
tntra-EEC	3 729	3 158	21	9	61	27	86	3	364
Extra-EEC	183	138	4		2	1	1		17
Lobsters, not whote									
Nethertands	)6	6	1			6	3		
Canada	19	1	6		1	2	9		
Wortd	90	16	6	4	14	17	19		14
tntra-EEC	28	8	1		3	12	4		
Extra-EEC	62	8	5	4	11	6	15		14
Ctass 1	41	3	5	1	6	2	10		14
Ctass 2	13				5	3	5		
Crayfish									
France	256	164		5	4	48	35		
Nethertands	59	27	3			28			1
UK	3 065	3	3 015	2	18	7		21	1
tretand	241		167			1	73		
Denmark	81	67			1	6	7		
Greece	23		19			4			
Turkey	2 337	121	2 007	27	8	141	1		32
US	203	30	38	1	27	24	71		12
Canada	55	9	32		4	5		2	3
Chite	11		5		2		4		
Bangtadesh	48			48					
Wortd	6 554	448	5 350	108	65	278	228	24	57
tntra-EEC	3 736	268	3 193	7	22	91	123	21	11
Extra-EEC	2 819	178	2 157	101	43	185	106	2	47
Ctass 1	2 701	163	2 113	52	39	184	101	2	47
EFTA countries	38	2	4			3	29		
Ctass 2	92	1	34	48	4	1	4		
Ctass 3	26	15	10						
Prawns and shrimps									
France	1 191	371		135	23	299	355	7	1
Betgium/Luxembourg	677	38	286		209		141		3
Nethertands	6 402	1 103	3 123			1 368	786	2	20
West Germany	4 244		17		3 492	149	472	1	113
ttaty	112	5	96		2		9		
UK	748	38	128	6	87	55		200	234
tretand	333		72				761		
Denmark	8 694	1 383	4 674	383	676	162	1 416		
tcetand	187	8	88		25		59		7
Faroes	12 268	1	3 145	172	209	375	1 493		6 871
Norway	927	8	504	80	1	7	319		8
Sweden	82		11	58	11		2		
Spain	78		1	70			7		
USSR	3 034		27	386			2 603		18
Tunisia	688	3	88	597					
Senega)	3 548	9	3401	35	50	53			
Guinea-Bissau	91		78	11		2			
Sierra Leone	270		63		5	42	160		
Liberia	736		443		77		216		
tvory Coast	406		389			1	16		
Cameron	35				2	6	27		
Gabon	1 008		999			9			
Tanzania	96		12			49	35		
Mozambique	1 077	31	1 044			2			
Madagascar	615		549				66		
US	238	15	4		82	82	55		
Canada	471		316	16	22	17	76		

Origin	EEC-9	West	France	Imports Value '000 ECU) Italy	Nethertandi	Belgium/ Luxembourg	UK	Iretand	Denmark
Mackerel fit lets, frozen									
UK	558	416			4	5		3	130
Ireland	681	594	11		34	14	28		
Denmark	727	680			6	2	39		
World	2 160	1 779	13	5	48	24	76	3	214
Intra-EEC	2 068	1 702	12	5	44	21	76	3	203
Extra-EEC	94	77	1		2	3			11
Lobsters, not whole									
Netherlands	119	82	9			19	9		
Canada	118	10	30		12	27	36		3
Wortd	615	157	40	14	104	107	116		77
tntra-EEC	227	108	11	2	39	50	17		
Extra-EEC	390	49	30	12	66	57	98		77
Class 1	229	20	30	6	33	27	37		76
Class 2	123	2			32	30	59		
Crayfish									
France	1 265	988		17	16	188	76		
Netherlands	325	139	9			176			1
UK	3 933	23	3 801	3	29	9		81	7
Ireland	416	1	273			7	135		
Denmark	273	230	2	2	3	16	20		
Greece	157		127			30		-	
Turkey	6 543	445	5 573	73	23	421	2		106
US	1 285	243	356	9	196	139	284		58
Canada	392	60	224		27	42		15	24
Chile	105		60		25		20		
Bangladesh	120			120					
World	15 570	2 263	10 637	273	331	1 106	554	76	230
Intra-EEC	6 354	1 394	4 106	23	56	405	268	81	41
Extra-EEC	9 215	889	6 531	250	275	700	386	18	189
Class)	8 771	765	6 366	130	247	697	383	15	188
EFTA countries	129	18	10			23	77		1
Class 2	314	4	136	120	28	3	23		
Class 3	127	99	28						
Prawns and shrimps									
France	6 862	2 319		262	152	2 009	2 092	24	4
Belgium/Luxembourg	2 046	218	826		378		603		21
Nethertands	17 512	2 789	7 598			4 196	2 881	6	42
West Germany	5 150		40		4 033	219	574	4	280
Italy	572	23	482		14		53		
UK	2 371	270	374	10	223	204		1 158	132
Iretand	3 541	1	521				2 929		
Denmark	19 665	2 075	11 191	895	1 403	391	3 710		
Iceland	682	39	198		76		333		36
Faroes	23 270	3	7 200	271	491	839	3 266		11 200
Norway	1 939	66	966	148	8	16	729		6
Sweden	170		22	123	13		12		
Spain	164		12	137			15		
USSR	1 759		16	280			1 453		10
Tunisia	4 822	12	678	4 132					
Senegal	18 104	69	17 361	147	226	301			
Guinea-Bissau	419		383	21		15			
Sierra Leone	1 585		282		42	238	1 023		
Liberia	3 790		2 237		376		1 177		
Ivory Coast	1 828		1 751			9	68		
Cameron	114		1		5	15	93		
Gabon	5 060		5 005			55			
Tanzania	334	1	47			159	127		
Mozambique	5 404	205	5 194			4			
Madagascar	3 511		3 146				365		
US	521	18	7	2	339	70	85		
Canada	948		594	35	100	14	178		25

	ImDorts Vo ume(tonnes!								
	EEC-9	West	France	Italy	Netherlands	Luxembourg	UK	Ireland	Denmark
Prawns and shrimps (continued)									
Greentand	4 754	2	136	15		18			4 583
Mexico	171		157			14			
Panama	166			151	10		5		
Cuba	1 580	2	234	1 343		1			
Surinam	23		18		5				
Brazil	104	9	84	6		5			
Chile	58	2		56					
Iran	68		11	16	18		23		
Kuwait	60	3		16			41		
Arab Emirates	29		29						
Pakistan	443	16	232		47	78	70		
India	3 601	122	729	69	611	347	1 723		
Bangladesh	1 325	133	41	249	345	211	346		
Thailand	2 297	129	131	364	20		553		
Indonesia	1 041	136	136	25	180	353	211		
Malaysia	419	31	61	34	64	24	205		
Sinypore	85		16	18	23		28		
China	1 282	486	53	10	404	33	292		4
Taiwan	93	14	22			53	3		1

Source: Eurostat-NtMEXE

Tabte 82 . Exports of major species, 1974/1979

Destination	Exoorts V 3tume (tonne s)								
	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxemboura	UK	Ireland	Denmark
Herring (excl. fillet), fn}sh or chilled, February 15-June 15									
France	622				35	1	28	9	549
Belgium/Luxembourg	651		18		118		4		511
Netherlands	2 486	11	213			4		64	2 194
West Germany	12 173		25		118				12 030
UK	782		3					779	
Austria	214	2							212
World	17 124	13	301	9	276	5	62	912	15 546
Intra-EEC	16 782	11	301		275	4	54	853	15 284
Extra-EEC	339	2					7	59	262
Class I	328	2						59	262
EFTA countries	323	2						59	262
Herring (excl. fillet), frczen, Februa y 15-June 1 i									
France	149			22	25	6	15	78	3
Belgium/Luxembourg	877	18	250		534			13	62
Netherlands	2 363	795	78			121	252	563	1 058
West Germany	1 189		59		494			286	350
UK	161		30		19			112	
Sweden	112				4			105	3
East Germany	156								156
Czechoslovakia	686								686
World	5 884	878	418	23	1 148	127	303	1 156	2 330
)ntra-EEC	4 823	385	418	22	1 097	127	282	1 051	1 471
Extra-EEC	1 060	14		1	50		21	105	859
Class 1	204	14			49		19	105	17
EFTA countries	159				42			106	12
Class 3	842								842

Imports
Value ('000 ECU)

Origin	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Prawns and shrimps (cont nued)									<
Greentand	7 6?9	3	302	35		46			7 313
Mexico	1 2)0		1 120			90			
Panama	765			639	)04		22		
Cuba	5 643	12	1 262	4 363		6			
Surinam	156		145		11				
Brazit	528	54	432	14		28			
Chite	155	14		141					
tran	360		48	76	98		138		
Kuwait	284	31		70			183		
Arab Emirates	127		127						
Pakistan	1 164	105	446		147	186	280		
tndia	12 720	869	2 027	267	2 102	1 710	5 745		
Bangtadesh	6 612	1 078	161	696	1 768	1 122	1 787		
Thaitand	4 610	1 055	432	847	28		2 248		
tndonesia	6 002	1 117	665	123	968	2 083	1 046		
Mataysia	1 382	119	190	103	131	65	774		
Singapore	319		45	83	78		113		
China	9 331	3 973	365	41	3 279	242	1 409		22
Taiwan	423	49	69			241	62		2

ExDorts
Value '000 ECU1

Destination	EEC-9	West Germanv	France	Italy	Netherlands	1	UK	Ireland	Denmark
Herring (excl. fillet), fresh or chilied, February 15-June 15									
France	531				39		11	6	475
Belgium/Luxembourg	662		14		116		23		509
Netherlands	1 966	7	116			3		34	1 806
West Germany	10 343		14	1	96				10 232
UK	448		3					445	
Austria	181	2							179
World	14 274	9	171	29	254	7	60	512	13 232
Intra-EEC	13 996	8	171	1	254	4	51	485	13 022
Extra-EEC	280	2		26	1	3	9	27	210
Class 1	245	2						27	210
EFTA countries	239	2						27	210
Herring (exc!. fillet), fr ∪									
France ,	124			29	16	2	11	63	3
Belgiun^Luxembourg	842	15	222		550			9	46
Netherlands	1 801	204	68			91	227	475	736
West Germany	954		53		443			217	241
UK	152		29		14			109	
Sweden	143				3			136	4
East Germany	131								131
Czechoslovakia	371								371
World	4 700	277	372	33	1 091	93	283	) 008	1 543
Intra-EEC	3 945	265	372	29	1 038	93	249	872	1 026
Extra-EEC	765	12		4	52		34	136	5)7
Class 1	245	12			50		32	136	15
EFTA countries	193				45			136	12
Ctass 3	502								502

Destination	EEC-9	West	France	Italy	Netherlands	Belgiurr/ Luxembourg	UK	Ireland	Denmark
				Exports Vcilume (tonne i					
Herring, fresh or chitted	June 16-February 14								
France	) 320	10			120	1	22	14	1 153
Betgium/Luxembourg	1 817	1	98		395		17	24	1 282
Nethertands	6 973	16	579			34	686	118	5 540
West Germany	25 013		22		341			24	24 626
UK	2 298		43					1 089	166
tretand	429						419		10
Austria	2 573	29							2 494
Wortd	39 651	68	765		856	36	1 148	1 268	35 511
tntra-EEC	36 884	40	783		856	35	1 144	1 268	32 778
Extra-EEC	2 770	29	2				5		2 734
Ctass 1	2 647	29	2				4		2 607
EFTAcountries	2 536	29	1						2 606
Herring, frozen, June 16-February 14									
France	719	132			285		85	143	74
Betgium/Luxembourg	1 775	317	90		971		8	235	154
Nethertands	13 968	602	52			131	2 983	2 385	7915
West Germany	5 891		94		604	20	78	206	4 889
UK	231	16	16		125			74	
Denmark	263	325			25			13	
Austria	167	3			71				93
East Germany	998								998
Czechostovakia	12 09	29							! 180
Wortd	25 561	1 322	282		2 101	151	2 310	3 055	15 370
tntw-EEC	22 944	1 191	282		2 011	151	3 263	3 055	13 031
Extra-EEC	2 617	131			90		57		2 339
Ctass 1	362	102			88		13		159
EFTAcountries	244	3			82				159
Class 3	2 206	29							2 177
Redfish, fresh or chilled									
Belgium/Luxembourg	552	325	221				6		
West Germany	313		100				32		181
World	970	345	351		2	16	63		193
Intra-EEC	965	345	350		2	16	63		189
Extta-EEC	5		1						4
Redfish, frozen									
West Germany	412		11		5		127		269
Italy	325	324			1				
Greece	167	167							
Cyprus	352	352							
Israel	1 046	940	106						
World	2 628	2 005	117		6		213	7	280
Intta-EEC	844	379	11		6		170	7	271
Extra-EEC	1 783	1 626	106				43		8
Class)	342	334							8
Class 2	1 441	1 292	106				43		
Cod (excl. fillets), fresh or chilled									
France	21 051	1 160			8 004	2 428	41	28	9 390
Belgium/Luxembourg	7 208	115	26		1 773		15	21	5 258
Netherlands	2 538	884				178	21		1 455
West Germany	3 355		17		253	2			3 083
Italy	1 119						1		1 118
UK	33 935	3 345	153		16 875	924		2 181	10 457
Denmark	1 228	1 163	4		61				
Sweden	452								452
Switzerland	431				1				430
Spain	92		5				'4	2	71
World	71 542	6 681	205	1	26 993	3 532	101	2 233	31 796
Intra-EEC	70 437	6 666	199		26 966	3 532	80	2 231	30 763
Extra-EEC	1 104	15	5	1	27		20	2	1 034
Class 1	1 077	15	5		22		18	2	1 015
EFTA countries	950	15			1				943

Exports
Value ('000 ECU)

Destination	EEC-9	West Germany	France	Italy	Netherlands	Belgiuni/ Luxembourg	UK	Ireland	Denmark
Herring, fresh or chittec , Aine 16-February 14									
France	; 1 186	7			115	1	19	10	1 034
Betgium/Luxembourg	1 663	2	65		363		14	4	1 215
Nethertands	I 5 536	14	319			29	384	58	4 731
West Germany	20 920		11		247			19	20 643
UK	923		45					750	128
tretand	202						193		9
Austria	2 037	23							2 014
Wortd	32 645	55	454	3	726	31	414	842	29 920
tntro-EEC	30 453	33	451		726	31	410	842	27 760
Extra-EEC	2 194	23	3	3			5		2 160
Ctass 1	2 099	23	3				3		2 070
EFTA countries	2 089	23	1						2 065
Herring, frozen, June 16-February 14									
France	490	96			169		63	119	43
Betgium/Luxembourg	1 698	282	80		985		17	191	143
Nethertands	12 269	422	32			110	2 429	1 924	7 352
West Germany	3 963		54		482	11	71	173	3 172
UK	202	17			115			55	
Denmark	249	217			25			7	
Austria	176	3			88				85
East Germany	897								897
Czechostovakia	771	20							751
Wortd	21 059	1 151	181		1 882	121	2 730	2 471	12515
tntra-EEC	18 908	1 034	181		1 777	121	2 673	2 471	10711
Extra-EEC	2 093	118			106		65		1 804
Ctass 1	374	98			102		22		152
EFTA countries	261	3			96				152
Ctass 3	1 669	20							1 649
Redfish, fresh or chitted									
Betgium/Luxembourg	472	281	185				5		1
West Germany	251		63				20		168
World	808	299	269			14	39		183
Intra-EEC	801	298	268		4	14	39		178
Extra-EEC	7	1	1						5
Redfish, frozen									
West Germany	310		4		4		70		232
Italy	200	199			1				
Greece	139	139							
Cyprus	197	197							
tstael	711	633	78						
World	1 820	1 338	83		6		149	6	238
Intra-EEC	596	246	4		6		102	6	234
Extra-EEC	1 219	1 092	78				46		3
Class 1	264	261							3
Class 2	954	830	78				46		
Cod (excl. fiUets), fresl									
France	21 872	744			6 987	1 972	50	37	12 082
Belgium/Luxembourg	11 103	74	42		1 997		31	7	8 952
Netherlands	2 119	523				200	9		1 387
West Germany	4 160		11		260	1			3 888
Italy	1 756		1		1		2		1 752
UK	26 282	2 257	136		12 608	739		1 849	8 693
Denmark	727	676	7		43	1			
Sweden ^	189								189
Switzerland	764				2				762
Spain	118		6				12	1	99
World	69 268	4 297	203	2	21 931	2 915	121	1 895	37 904
Intra-EEC	68 026	4 275	197		21 896	2 914	93	1 894	36 757
Extra-EEC	1 242	22	6	2	35	1	28	1	1 147
Class 1	1 201	22	6		32		22	1	1 118
EFTA countries	1 041	22			2				1 017

Tabte 82 . Exports of major species, 1974/1979 (continued)

Dest.nat.on	Exports Volume (tonnes)								
	EEC-9	West Germany	France	Italy	Netherlands	Luxemboura	UK	Ireland	Denmark
Cod (exct. fittets), froze									
France	244	148			9	7	25		55
Be!gium/Luxembourg	331	)71	25	9	17		11	2	96
West Germany	19!		33	31	4	4	35		84
UK	1 9Ü	720	101		!15			34	941
Denmark	150	40					110		
Switzertand	136				1			15	120
Greece	287			287					
Wortd	3 806	1 147	)65	452	178	26	273	51	1 515
tntra-EEC	2 961	1)19	160	42	177	25	206	37	1 195
Extra-EEC	849	29	6	410	'	1	67	15	320
Class 1	711	2		366	1		14	!5	313
EFTAcountries	207	2			1			15	189
Class 2	120	27	6	26		!	53		7
Saithe, fresh or chitted									
France	1 766	170			256	30	74	9	1 227
Betgium/Luxembourg	296	192	44		3				57
Netheriands	1 904	82	958			4◇	124	7	684
West Germany	9 858		5 872		623	148	114		3 10)
ttaiy	430		1						429
UK	567		389		22	2		60	94
Denmark	536	55	395		86				
Switzerland	161								161
World	15 609	516	7 679		1 000	229	329	77	5 779
Intm-EEC	15 390	516	7 658		989	229	329	77	5 592
Extra-EEC	222		22		12			1	187
C l a s s)	221		21		12			1	!87
EFTA countries	176								176
Saithe, frozen									
France	180	9			12	3	154		2
West Germany	301		147	2	5	1	62		84
UK	17!	75						13	83
US	152		145						7
World	1 105	187	351	27	18	7	280	13	222
Intm-EEC	854	181	183	2	18	7	276	!3	174
Extra-EEC	253	6	168	26		1	5		48
Class)	177	1	155	9			4		8
Haddock (excl. filtets) frssh or chilled									
Belgium/Luxembourg	575		73		18		1		483
Netherlands	! 221	!	189			4			1 027
West Germany	2 043		39		6				1 998
UK	2 016	4	844		57	100		124	867
Sweden	353								353
World	6 316	6	1 150		93	126	1	124	4 816
Intm-EEC	5 938	5	! 150		93	!26	1	!24	4 439
Extra-EEC	378	1							377
Class 1	378	1							377
EFTAcountries	363	!							362
Haddock (excl. fillets), frozen									
World	513	22	21		2		364	2	102
Intra-EEC	465	22	20		1		348	2	72
Extra-EEC	49		1		1		17		30
Whiting, fresh or chilled									
France	1 947	71			805	77!	59	40	20!
Belgium/Luxembourg	259	1	19		146		15	!	77
Netherlands	312					278		1	33
Italy	186								186
UK	388		121		137			)02	28
Sweden	215								215
World	3 709	72	160		1 320	1 054	175	144	784
Intm-EEC	3 449	72	146		! 320	! 054	168	)43	546
Extra-EEC	258		14				6	)	237
Class 1	258		14				6	!	237
EFTA countries	235								235

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Exports
Value ('000 ECU)

Destination	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Cod(exc!. fiüets), frozen									
France	246	137			12	14	40		43
Be!gium/Luxembourg	5)5	247	49	10	29		22	3	155
West Germany	247		29	41	8	9	34		126
UK	1 874	887	94		77			55	761
Denmark	156	14					142		
Swi tzertand	365				1			25	339
Greece	173			173					
Wor!d	4 162	1 336	189	308	171	49	446	94	1 580
!ntm-EEC	3 204	1 318	172	52	169	46	295	58	1 094
Extra-EEC	955	17	17	256	2	2	150	25	486
C!ass 1	756	3		227	1		26	25	474
EFTA countries	424	3			1			25	395
C!ass 2	174	14	17	5		2	124		12
Saithe, fresh or chiüed									
France	2 153	142			250	29	73	6	1 653
Be!gium/Luxembourg	157	59	30		3				65
Nethertands	1 314	55	566			32	68	6	587
West Germany	5 166		3 373		356	110	65		2 262
!ta!y	655		1						654
UK	274		173	1	11	2		45	42
Denmark	286	29	210		47				
Switzeriand	344								344
Worid	11 465	311	4 376	1	678	173	224	57	5 645
!ntra-EEC	11 048	311	4 352	1	667	173	224	57	5 263
Extra-EEC	417		24		11				382
C!ass 1	417		24		11				382
EFTA countries	368								368
Saithe, frozen									
France	280	7			9	5	257		2
West Germany	253		96	2	2	1	51		101
UK	105	53						7	45
US	159		157						2
Worid	1 117	148	343	30	12	12	368	7	200
!ntm-EEC	841	140	152	2	12	10	362	7	156
Extra-EEC	276	5	191	28		2	6		44
C!ass 1	201	2	179	12			5		3
Haddock (exc!. fiüets) 1resh or chilled									
Be!gium/Luxembourg	756		85		21		2		648
Nether!ands	1 013	1	136			2			874
West Germany	2 539		35		9	1			2 494
UK	I 517	3	591		36	81		119	685
Sweden	253								253
Worid	6 210	5	850		76	95	2	119	5 043
!ntra-EEC	5 903	4	850		76	95	2	119	4 757
Extra-EEC	307	1							306
C!ass 1	307	1							306
EFTA countries	266	1							265
Haddock (exci. fiüets), frozen									
Worid	304	23	34		4		108	I	137
!ntra-EEC	223	23	30		1		67	1	101
Extra-EEC	82		4		3		39		36
Whiting, fresh or chiüec									
France	1 177	36			464	418	68	43	148
Be!gium/Luxembourg	175	1	16		87		3	3	65
Nether!an&	167					145		4	18
!ta!y	196								196
UK	201		59		71			58	13
Sweden	122								122
World	2 240	37	114		700	566	110	115	598
Intto-EEC	2 052	37	79		700	566	105	109	456
Extra-EEC	188		35				5	6	142
Class 1	188		35				5	6	142
EFTA countries	140								140

Destination	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
				ExDorts Volume (tonnes 1					
Whiting, frozen									
France	162				27	5	126	4	
West Germany	1 088		1		1 087				
Switzertand	76	2							74
Austratia	94						94		
Wortd	1 749	19	95		1 245	34	240	29	87
tntra-EEC	1 513	16	72		1 230	34	131	29	7
Extra-EEC	230	3	23		15		109		80
Ctass 1	204	3	1		12		108		80
EFTA countries	95	3			12				80
Mackere! (exct. fittets), fresh or chilled, February 15-June 15									
France	2 585	2		8	1		2 521	23	10
Be!gium/Luxembourg	704		38		8		654		4
Nethertands	714		419				271	16	8
West Germany	1 332		422		68		506	17	319
ttaty	690	53	610				15		12
UK	1 192		180		1			550	461
Greece	462		228	6	211		17		
USSR	39 464		132				39 614		
East Germany	18 933						18 933		
Potand	4 485						4 485		
Butgaria	4 300						4 300		
Nigeria	9 228						9 228		
Wortd	84 563	61	2 079	32	291		80 471	688	941
tnter-EEC	7 249	55	1 719	8	78		3 969	606	814
Extra-EEC	77 314	6	360	24	213		76 502	82	127
Ctass 1	709	6	228	24	213		42	69	127
Ctass 2	9 243		1		1		9 228	13	
ACP countries	9 239		1				9 228	10	
Class 3	67 364		132				67 232		
Mackere! (exc!. fÜTets), frozen, February 15-June 15									
France	1 729				323		1 066	340	
Be!gium/Luxembourg	367		12		102		199	53	1
Nether!ands	588						199	338	51
West Germany	4 602				3 416		136	467	583
tta!y	967	39	249		466		213		
Denmark	974	248			95		631		
Faroes	664						444	220	
Portuga!	1 044				1 006		38		
Yugostavia	1 358	262	139	44			490		423
Greece	271	134			80				57
Czechostovakia	6 183	5 965							218
Butgaria	991						991		
tvory Coast	4 890		1 248		1 768		1 174		
Nigeria	46 888				31 266		14 861	761	
tsraet	470	124	8		155		42		141
Wortd	73 325	6 842	2 403	44	39 293		19 721	3 206	1 817
tntra-EEC	9 265	287	281		4 404		2 448	1 232	635
Extra-EEC	64 062	6 555	2 143	44	34 880		17 275	1 973	1 182
Ctass 1	4 029	440	139	44	1 392		1 020	220	765
EFTA countries	1 447	44			1 029		89		285
C!ass 2	52 341	150	2 004		33 189		16 095	761	141
ACP countries	51 794		1 948		33 034		16 051	761	
Class 3	7 690	5 965			308		150	991	276

Destination	EEC-9	West Germany	France	Italy	Netherlands	Belgiun^/ Luxembourg	UK	Ireland	Denmark
				Exports Value '000 ECU)					
Whiting frozen									
France	234				19	3	206	6	
West Germany	266		I		265				
Switzeriand	184	4							181
Australia	156						156		
World	1 033	10	64	1	321	20	396	22	199
Intra-EEC	630	3	42		314	20	212	22	15
Extra-EEC	402	5	22	1	6		184		184
Class 1	374	5	1		5		179		184
EFTA countries	194	5			5				184
Mackerel (excl. fillets), fresh or chilled, February 15-June 15									
France	576	1		5			557	6	7
Belgium/Luxembourg	131		17		5		105		4
Netherlands	187		114				68	3	2
West Germany	452		172		35		71	9	165
Italy	430	15	401				5		9
UK	231		82					94	55
Greece	285		138	4	137		6		
USSR	5 257		25				5 232		
East Germany	2 737						2 737		
Poland	713						713		
Bulgaria	569						569		
Nigeria	1 108						1 108		
World	12 818	21	970	32	180		11 184	127	204
Inter-EEC	2 026	16	805	5	41		808	112	241
Extra-EEC	10 792	6	164	27	139		10 378	15	63
Class 1	401	6	138	26	139		19	10	63
Class 2	1 113		1				1 108	4	
ACP countries	1 112		1				1 108	3	
Class 3	9 276		25				9 251		
Mackerel (excl. fillets , frozen, February 15-Junl 15									
France	548				54		350	134	
Belgium/Luxembqurg	149		5		35		84	25	
Netherlands	182						57	108	17
West Getmany	1 514				1 072		60	184	198
Italy	347	10	90		159		88		
Denmark	360	92			31		237		
Faroes	209						139	70	
Portugal	229				218		11		
Yugoslavia	532	123	50	17			183		159
Greece	104	55			28				21
Czechoslovakia	2 602	2 631							71
Bulgaria	196							196	
Ivory Coast	I 365		519		520		326		
Nigeria	11 398				7 193		4 012	193	
Israel	169	50	3		40		22		54
World	20 382	2 688	687	18	9 547		5 639	929	274
Intra-EEC	3 123	102	98		1 361		879	471	215
Extm-EEC	17 269	2 786	592	18	8 186		4 760	459	458
Class 1	1 321	197	50	17	339		348	70	300
EFTA countries	390	18			228		23		121
Class 2	12 966	58	542		7 753		4 366	193	54
ACP countries	12 766		519		7 713	j	4 341	193	
Class 3	2 972	2 631			95		46	196	104 1

(continues)

Table 82 . Exports of major species, 1974/1979 (continued)

Destination	Exports Volume (tonnes) EEC-9	West Germany	France	Italy	Nethertands	Belgium/ Luxembourg	UK	Ireland	Denmark
Mackerel (excl. fillets), fresh or chilled, June 14-February 14									
France	13 978				178	2	13719	22	57
Belgium/Luxembourg	962		101		35		514	274	38
Nethertands	6 134	3	941			130	3 284	773	1 003
West Germany	5 202		476		493	4	73	81	4 075
Italy	2 374		1 439		1		747		187
UK	3 100		146		6			1 518	1 430
Sweden	481								481
Yugoslavia	124		36	88					
Greece	400		43		89		15		253
USSR	94 021						94 021		
East Germany	13 364						13 364		
Poland	9 038						9 038		
Bulgaria	20 461						20 461		
Egypt	2 747						2 747		
Nigeria	14 201						14 201		
World	186 739	9	3 161	106	803	135	172 299	2 668	7 559
Intra-EEC	31 822	3	3 102		713	135	18 412	2 668	6 789
Extra-EEC	154 937	6	80	106	90		153 887		769
Class 1	1 102	6	80	103	89		55		769
EFTA countries	524	6	1						517
Class 2	16 949				1		16 948		
ACP countries	14 201						14 201		
Class 3	136 884						136 884		
Mackerel (excl. fillets), frozen, June 16-February 14									
France	3 526	299			206		2 092	601	328
Belgium/Luxembourg	441		22		189		89	136	5
Netherlands	2 457						1 076	1 260	121
West Germany	10 282			8	2 298		3 152	1 434	3 390
Italy	1 919	10	73		448		1 348		40
Denmark	196	111					85		
Sweden	682				14		626		42
Austria	628	6			6		18		598
Yugosiavia	2 383	777	121	22			655		808
Greece	1 003	516			85				402
USSR	9 039						9 039		
East Germany	6518						6 518		
Poland	1 271						1 271		
Czechoslovakia	9 017	8 839							178
Egypt	4 263				3 233		1 030		
Liberia	1 200						1 200		
Ivory Coast	9 927		744		5 876		3 307		
Ghana	450						450		
Nigeria	83 821	144			36 423		46 705		549
Jamaica	1 511				1 509			2	
Israel	1 396	128	106		399		12		751
World	153 007	10 869	1 213	30	50 862		75 612	3 578	10 843
Intra-EEC	19 000	420	95	8	3 159		7 858	3 577	3 883
Extra-EEC	134 009	10 449	1 119	22	47 703		67 954	2	6 760
Class 1	5 432	1 322	167	22	263		1 692		1 966
EFTA countries	1 856	27	1		42		1 030		756
Class 2	102 731	288	952		47 439		52 750	2	1 300
ACP countries	96 909	144	744		43 808		51 662	2	549
Class 3	25 845	8 839					13612		3 494
Ptaice (excl. fillets), fresh or chilled									
France	373				55	13	8		297
Belgium/Luxembourg	1 120		4		691				425
Netherlands	2 667	78	18			1 195	16	4	1 356
West Germany	6 360		36	7	1 765	33	1		4 518
Italy	102								102
UK	15 021	1	93		11 424	19		22	3 462
Denmark	3 440	203	25		3 160	52			
Sweden	1 060								1 060
World	30 282	289	175	7	17 162	1 312	33	26	11 278
Intra-EEC	29 129	282	175	7	17 138	1 312	30	26	10 159
Extra-EEC	1 152	7			23		3		1 119
Class 1	1 152	7			23		3		1 119
EFTA countries	1 107	7							1 100

Destination	Exoorts Value ('000 ECU) EEC-9	West Germany	France	Italy	Netherlands	Belgiut!^ Luxemboura	UK	Ireland	Denmark
Mackere! (exc!. fiüets), fresh or chilled, June 6-February 14									
France	2 982				53	1	2 893	9	26
Be!gium/Luxembourg	218		37		17		94	52	18
Nether!ands	1 383	2	249			41	630	161	300
West Germany	1 863		159		203	6	19	30	1 446
!ta)y	1 308		1 054				128		126
UK	493		58		1			248	186
Sweden	241								241
Yugoslavia	143		39	104					
Greece	242		30		75		11		126
USSR	13 054						13 054		
East Germany	1 852						1 852		
Po!and	1 202						1 202		
Bu!garia	3 049						3 049		
Egypt	408						408		
Nigeria	1 926						1 926		
Wor!d	30 471	7	1 628	121	351	49	25 328	500	2 487
!ntra-EEC	8 303	2	1 558		275	49	3 818	500	2 101
Extra-EEC	22 167	4	70	121	76		21 510		386
C!ass 1	670	4	70	116	75		19		386
EFTA countries	265	4	1						260
C!ass 2	2 335				1		2 334		
ACP countries	t 926						1 926		
C!ass 3	19 157						19 157		
Mackere! (exc!. fiüets), frozen, June 16-February 14									
France	1 202	153			44		606	248	151
Be!gium/Luxembourg	162		8		79		28	45	2
Nether!an&	758					2	299	415	42
West Germany	3 202			2	782		653	548	1 217
!ta!y	491	6	26		154		289		16
Denmark	101	59					42		
Sweden	195				7		162		26
Austria	287	3			3		6		275
Yugos!avia	1 012	399	47	19			238		309
Greece	407	232			25				150
USSR	1 372						1 372		
East Gemiany	2 603						495		2 108
Po!and	196						196		
Czechos!ovakia	3 811	3 728							85
	963				677		286		
Liberia	334						334		
ivory Coast	2 665		216		1 627		922		
Ghana	125						125		
Nigeria	21 254	43			6 747		12 321		143
Jamaica	380				379			1	
Israel	513	53	49		119		6		286
World	42 410	4 692	412	21	12 599	2	18 509	1 317	4 858
tntra-EEC	5 987	217	34	2	1 065	2	1 923	1 316	1 428
Extra-EEC	36 424	4 475	378	19	11 534		16 586	1	3 431
Class)	2 121	648	68	19	84		495		807
EFTA countries	635	16			19		252		348
Class 2	26 317	100	310		11 449		14 027	1	430
ACP countries	24 758	43	216		10 653		13 707	1	143
Class 3	7 983	3 720					2 064		2 193
Ptaice (excl. fillets), fresh or chiHed									
France	344				51	11	6	1	275
Belgium/Luxembourg	1 236		2		755				479
Netherlands	1 879	53	9			773	11	4	1 029
West Germany	6 090		19	4	1 662	29	5		4 371
Italy	117								117
UK	12 886	2	60		9 711	17		19	3 077
Denmark	2 712	121	14		2 548	29			
Sweden	1 397						2		1 395
World	26 886	183	105	4	14816	858	48	25	10 845
Intra-EEC	25 327	176	106	4	14 776	858	36	25	9 348
Extra-EEC	1 560	8			44		12		1 496
Class !	1 560	8			44		12		1 496
EFTA countries	1 461	8			1		2		1 450

Exports
Volume(tonnes)

D t' t'	EEC-9	West	Fronce	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark	
P!aice(exc!.fi!!ets), frozen										
	190			37	28	11			114	
West Germany	779		1		517	66			195	
Greece	155			138	17					
Austra!ia	300				129		116		55	
Wortd	1 808	45	6	193	632	107	177		448	
!ntra-EEC	1 136	24	4	55	599	80	40		334	
Extra-EEC	674	22	3	138	233	27	137		114	
C!ass1	638	21		138	222	26	127		104	
EFTAcountries	77	21			6		5		46	
Codfitiets, fresh or chi!! ed										
France	3 548	1 379			534	39			15%	
Be!gium/Luxembourg	1 342	127	1		278				936	
Nether!ands	1 060	77				16			867	
West Germany	2 013				128	3	9		1 873	
!ta!y	807				4		1		802	
UK	620	15	3		3	26		71	602	
Denmark	87	82	2		1	2				
Norway	446								446	
Sweden	84								84	
Switzer!and	651	131			1				519	
Austria	1 008	340					6		663	
Wor!d	11 737	2 160	5		949	88	22	71	8 455	
!ntra-EEC	9 479	1 680	5		948	85	14	7)	6 676	
Extra-EEC	2 259	470			2		8		1 779	
C!ass1	2 254	470			1		5		1 778	'
EFTAcountries	2 190	470			1		5		1 714	
Seafishfi!!ets(exc!. cod), fresh orchiüed										
France	737	351		1	165	26	32	5	167	
Betgium/Luxembourg	732	317	13		184		2	10	206	1
Nethertands	579	154	2			20		323	80	1
West Germany	8 704		377		775	74	7	117	7 354	
!ta!y	1 149		2		1 091		2	5	49	
UK	716	34	13		38	1		550	80	
!re!and	113		1				112			
Denmark	99	36	39		23	1				
Norway	185								185	
Sweden	822				1				821	
Switzerland	1 200	26	10		618			5	541	
Austria	468	246							222	
US	62				17		16		29	
Wor!d	15 809	1163	484	9	2 911	123	190	1 016	9 733	
!ntra-EEC	12 829	891	449	1	2 275	122	154	1 010	7 927	
Extra-EEC	2 779	272	15	9	635	1	36	5	1 806	
C!ass1	2 749	272	12		635	1	26	5	1 798	
EFTAcountries	2 674	272	10		619	1		5	1 767	
Cod fiÜets, frozen										
	8 533	8 289			39	84	20		121	
	4 633	4 341	233		27		27		5	
Nethertands	3 161	1 780	23			1329	25		4	
West Germany	1 353		362	1	44	48	68		830	
!ta!y	1 807	635			147				1025	
UK	15 869	7218	1576		24	3		82	6966	
!re!and	281						281			
Denmark	77	17	4				56			
Norway	131						127		' 4	
Sweden	6 704	220							6 484	
Switzer!and	649	13	1						635	
Austria	1 151	966	80						105	
Czechos!ovakia	81	20							61	
Hungary	140			140						
US	9 910	38			4		17		9 851	
tsrae!	74	11							63	
Saudi Arabia	99						44		55	

Exports
Value '000 ECU)

Destination	EEC-9	West Germany	France	Italy	Belgium/ Luxembourg	Belgium/ Luxembourg	UK	Ireland	Denmark
Ptaice (excl. fiüets, fro									
Fmnce	11)			26	17	16			52
West Germany	) 180		1		747	112			320
Greece	162			146	16				
Austra!ia	613				131		425		57
Wor!d	2 742	62	5	191	1 138	166	580		600
!ntra-EEC	1 567	15	3	45	857	132	106		410
Extra-EEC	1 175	47	2	148	281	34	475		190
C!ass 1	1 096	45		146	267	33	447		158
EFTA countries	158	45			7		9		97
Cod filtets, fresh or chit ed									
France	6 517	2 504			1 044	79			2 990
Beigium/Luxembourg	2 805	246	2		653				1 905
Nethertands	1 959	144				40			1 775
West Germany	3 454				234	5	19		3 196
Italy	1 726				15		3		1 708
UK	1 038	22	5		7	49		69	886
Denmark	133	125	3		2	3			
Norway	661								661
Sweden	152								152
Switzertand	1 431	321			2				1 108
Austria	1 979	653					9		1 317
Wortd	22 108	4 015	10		1 956	175	48	69	)6 835
[ntra-EEC	17 738	3 040	10		1 963	175	31	69	12 480
Extra-EEC	4 370	975			5		15		3 375
Ctass)	4 360	975			2		9		3 374
EFTA countries	4 227	975			2		9		3 241
Sea fish fillets (excl. coc), fresh or chilled									
France	1 317	428			494	51	54	7	282
Belgium/Luxembourg	1 825	800	23		532		6	10	454
Netherlands	1 002	367	3			131		394	107
West Germany	10 518		497		1 467	140	22	112	8 280
Italy	3 271	1	10		3 134		3	9	114
UK	1 149	10	19		52	3		883	182
Ireland	183		2				181		
Denmark	136	34	60		41	1			
Norway	295								295
Sweden	2 142				6				2 136
Switzertand	4 100	71	32		2 144			21	1 332
Austria	915	493							422
US	144		1		45		34		64
World	27 092	2 206	664	23	7917	329	333	1 437	14 183
Intra-EEC	19 405	1 841	614	1	5 721	327	266	1 416	9 419
Extro-EEC	7 688	565	50	22	2 196	2	67	21	4 765
Class !	7 634	565	42		2 195	2	53	21	4 756
EFTA countries	7 458	565	33		2 150	2		21	4 687
Cod fillets, frozen									
France	14 445	14 031			63	132	28		193
Be!gium/Luxembourg	8 916	8 328	465		53		60		10
Netherlands	6 709	3 606	38			3 012	45		7
West Germany	2 446		618	1	93	104	158		1 471
Italy	3 524	1 292			329				1 903
UK	26 155	12 207	2 509		28	6		125	11 280
Iretand	577						577		
Denmark	137	26	6				106		
Norway	228						224		4
Sweden	12 094	424							11 670
Switzerland	1 747	29	2	;			2		1 7!4
Austria	2 373	2 088	120						165
Czechoslovakia	115	30							85
Hungary	137			137					
US	16 089	59			9		34		15 987
Ismel	122	11							111
Saudi Arabia	222						104		118

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Destination	EEC-9	West Germartv	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
				ExDOrt! Vo!ume (tonnes!					
Cod fiüets, frozen (continued)									
Wor!d	54 845	23 550	2 29!	143	292	1 449	739	82	26 299
!ntw-EEC	34 894	22 279	2 198	1	282	1 445	457	82	8 950
Extra-EEC	19 152	1 271	93	142	11	4	282		)7 349
C!ass 1	18584	1 236	88		4		162		17 094
EFTAcountries	8 637	1 198	81				127		7 23)
Ciass 2	342	14	5		6	4	119		194
C!ass 3	222	21		140					81
Saithe fiüets, frozen									
France	1 229	1 071				126	7	1	24
Be!gium/Luxembourg	1 121	1 095	4		9			13	
Netherlands	1 790	686				1 103		1	
West Germany	3 171		! 383		26	8	177		1 578
!ta!y	656	654					2		
UK	380	178							202
!re!and	80						80		
Sweden	524	131							393
Austria	75	61							!4
US	693						!		692
Wor!d	9 701	3 800	! 394	1	34	1 256	285	15	29)6
!ntra-EEC	8 339	3 584	1 387		34	1 236	280	15	1803
Extra-EEC	1 362	216	8			20	5		11)3
C!ass1	1 328	193				20	4		) 11)
EFTAcountries	633	192				20	2		419
Haddock fiüets, frozen									
France	240	193			1	1			45
Nethertands	286	221				64	!		
UK	134	48						1	84
Sweden	183								)83
US	845						76		769
Saudi Arabia	71						17		54
Wortd	1 945	500	1	1	6	73	184	1	1 182
tntra-EEC	747	499			4	73	24	1	146
Extra-EEC	1 201	1	!	1	2		160		! 038
Ctass1	1 066	1			1		106		958
EFTAcountries	189	1			1		1		166
Ctass 2	134		1		1		84		78
Redfish fiüets, frozen									
France	331	324					7		
Be!gium/Luxembourg	189	120	24				45		
West Germany	157		58						99
!ta!y	139	139							
US	92	77					15		
Wor!d	1 113	801	82				101		129
!ntm-[EC	878	623	81				52		!22
Extra-EEC	236	178	1				50		7
C!ass 1	171	129					38		4
Mackere! fiüets, frozen									
Nether!ands	238	10					78	143	7
West Germany	3 095		7		23		1 !44	1 047	874
Denmark	243	101					!42		
Czechos!ovakia	516	516							
Wor!d	4 685	745	16		40		I 679	1 288	920
[ntm-EEC	3 835	206	9		40		1 411	! 285	884
Extra-EEC	850	539	7				268		36
C!ass 1	176	1					149		28
EFTAcountries	178	1					149		28
Ctass 3	516	516							

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Destination	Exports Value ('000 ECU)								
	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Cod fillets, frozen (continued)									
World	96 503	42 138	3 776	141	588	3 261	1 569	126	44 903
Intra-EEC	62 910	39 489	3 636	1	566	3 254	975	126	14 864
Extra-EEC	33 594	2 650	142	140	22	6	595		30 039
Class 1	32 604	2 600	128		9		299		29 568
EFTA countries	16 445	2 541	122				226		13 556
Class 2	732	18	13		13	6	296		386
Class 3	254	32		137					85
Saithe fillets, frozen									
France	1 564	1 380				144	9	1	30
Belgium/Luxembourg	1 345	1 306	5		13			21	
Netherlands	2 936	980				1 953		3	
West Germany	3 838		1 649		39	12	227		1 911
Italy	844	839					5		
UK	334	201							133
Ireland	142						142		
Sweden	747	189							558
Austria	121	99							22
US	725						3		722
World	12 688	5 017	1 663	1	52	2 133	399	25	3 398
Intra-EEC	11 008	4 705	1 654		52	2 108	390	25	2 074
Extra-EEC	1 680	312	9			25	9		1 326
Class 1	1 648	281				25	9		1 323
EFTA countries	915	288				25	3		598
Haddock fillets, frozen									
France	406	328			2	1			75
Netherlands	599	429				167	3		
UK	251	89						1	161
Sweden	415	1							414
US	1 567						184		1 383
Saudi Arabia	158						39		119
World	3 612	914	3	2	16	189	453	1	2 234
Intra-EEC	1 435	912			8	189	63	1	282
Extra-EEC	2 376	1	3	2	8		390		1 872
Class 1	2 067	1			5		254		1 807
EFTA countries	428	1			5		3		419
Class 2	307		3		3		136		165
Redfish fillets, frozen									
France	451	442					9		
Belgium/Luxembourg	267	172	15				80		
West Germany	252		95						157
Italy	208	208							
US	131	106					26		
World	1 558	1 097	111		1		162		187
Intra-EEC	1 249	875	110				91		173
Extra-EEC	309	222			1		71		14
Class 1	252	185			1		59		7
Mackerel fillets, frozen									
Netherlands	139	17					45	72	5
West Germany	1 537		9		8		565	505	450
Denmark	137	60					77		
Czechoslovakia	283	283							
World	2 433	396	15		21		885	627	489
Intra-EEC	1 951	121	10		21		713	627	459
Extra-EEC	482	275	5				172		30
Class 1	123	1					96		26
EFTA countries	123	1					96		26
Class 3	263	263							

(continues)

Table 82 . Exports of major species, 1974/1979 (continued)

Destination	Exports Volume (tonnes)								
	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Lobsters, not whole									
West Germany	10				8		1		1
Switzerland	21				1		17		3
US	210						210		
World	311	2		1	16	1	254	26	11
Intra-EEC	71			1	16	1	21	26	6
Extra-EEC	241	2			1		232		6
Class 1	237	2			1		228		6
EFTA countries	24	2			1		17		4
Crayfish									
France	3 081				13	10	2 972	64	2
Belgium/Luxembourg	93	26	23		24		12		8
Netherlands	101	51	1		24		12		8
West Germany	57		9	3	8	3	18		10
Italy	322		310				12		
UK	216		24					185	7
Denmark	350						350		
Switzerland	352		1				94	252	5
Portugal	606		606						
Spain	3 480		1 958	1			1 521		
World	8 712	79	2 949	4	46	26	5 033	521	54
Intra-EEC	4 245	78	366	3	46	29	3 411	268	47
Extra-EEC	4 466	1	2 583	1	1		1 621	252	7
Class 1	4 449	1	2 672	1	1		1 616	252	6
EFTA countries	967	1	614				94	252	6
Class 2	16		11				5		
Prawns and shrimps									
France	10 724	18		111	3 210	538	1 208	160	5 479
Belgium/Luxembourg	2 308	173	308		1 405		65		356
Netherlands	5 107	4 005	26			123	160	3	790
West Germany	3 170		471	6	1 023	122	270		1 278
Italy	876		122				284	32	438
UK	3 694	420	295		701	128		421	1 729
Ireland	172		13		2		157		
Denmark	267	83	14		4	3	163		
Norway	509				1	3	7		498
Sweden	3 762	7			3		4		3 748
Switzerland	241	14	194	5	2		8	3	15
Austria	29	16	2		6		1		4
Spain	1 373		54	124			1 153	16	26
Reunion Islands	90		90						
US	479				215	48	216		
Canada	99				99				
Cyprus	24		2				22		
Saudi Arabia	176		80				84		
Taiwan	232					232			
Australia	20				20				
World	33 587	4 737	1 762	262	6 710	1 197	3 886	636	14 397
Intra-EEC	26 319	4 700	1 250	117	6 345	914	2 308	616	10 069
Extra-EEC	7 268	37	512	145	365	283	1 578	20	4 328
Class 1	6 623	37	286	137	360	52	1 432	20	4 299
EFTA countries	4 563	37	214	5	12	3	20	3	4 269
Class 2	639		226	1	5	232	146		29

Destination	Exports Value ('000 ECU)								
	EEC-9	West Germany	France	Italy	Netherlands	Belgium/ Luxembourg	UK	Ireland	Denmark
Lobsters, not whole									
West Germany	129				106	3	9	3	8
Switzerland	333				6		286		41
US	2 044						2 044		
World	2 836	14	1	2	181	5	2 491	66	106
Intra-EEC	366		1	2	134	4	121	64	40
Extra-EEC	2 468	14			17		2 370	1	66
Class 1	2 431	14			14		2 336	1	66
EFTA countries	355	14			6		286		49
Crayfish									
France	4 094				108	68	3 718	188	12
Belgium/Luxembourg	361	15	118		126		80		22
Netherlands	189	50	3			65	34		37
West Germany	232		38	6	57	26	57		48
Italy	685		666				19		
UK	315		47					249	19
Denmark	687	2					685		
Switzerland	738		1				184	529	24
Portugal	1 046		1 046						
Spain	5 027		3 429				1 598		
World	13 599	74	5 446	11	300	159	6 470	966	173
Intra-EEC	6 607	67	873	6	291	159	4 635	438	138
Extra-EEC	6 994	8	4 574	4	9		1 835	529	35
Class 1	6 881	8	4 512	4	5		1 791	529	32
EFTA countries	1 842	8	1 082	4			187	529	32
Class 2	112		62		4		43		3
Prawns and shrimps									
France	27 279	42		356	7 924	1 463	3 815	793	12 886
Belgium/Luxembourg	7 881	397	2 127		4 244		246		867
Netherlands	9 852	6 941	196			499	624	3	1 589
West Germany	10 093		3 014	23	3 009	606	1 357		2 084
Italy	2 863		215				1 606	148	894
UK	11 099	510	2 080		2 846	498		1 415	3 750
Ireland	944		91		5		848		
Denmark	780	253	28		31	21	447		
Norway	1 033				8	25	14		986
Sweden	8 584	37			21		12		8 514
Switzerland	1 389	100	1 078	35	10		57	13	96
Austria	212	144	16		30		5		17
Spain	5 652		248	444			4 848	51	61
Reunion Islands	271		271						
US	1 868				828	110	930		
Canada	354				354				
Cyprus	148		10				138		
Saudi Arabia	1 023		595		4		387		37
Taiwan	265					265			
Australia	154				153	1			
World	92 691	8 425	10 324	925	19 511	3 488	15 732	2 424	31 862
Intra-EEC	70 792	8 143	7 753	379	15 061	3 086	8 942	2 359	22 069
Extra-EEC	21 899	281	2 571	546	1 480	402	6 790	66	9 793
Class 1	19 642	281	1 451	509	1 437	136	5 052	64	9 712
EFTA countries	11 296	281	1 155	35	69	25	88	13	9 630
Class 2	2 219		1 119	3	13	265	738	1	80

Source: Eurostat NIMEX

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