Advice

STECF's Annual Economic Report on the EU Fishing Fleet (2026)

Brussels, 5 February 2026

1. Background

The Scientific, Technical and Economic Committee for Fisheries (STECF) publishes, every year, the Annual Economic Report on the EU Fishing Fleet[1], which provides a comprehensive overview of the latest information available on the structure and economic performance of EU Member State fishing fleets, for example on fishing capacity, effort, employment, landings, income and costs. The 2026 edition is expected to cover the period 2008 to 2026 with 2024 as the reference year and nowcast performance estimates for 2025 and 2026.

As highlighted in previous advice[2], the report has particular relevance for the work of the Market Advisory Council (MAC) and is highly valued by the EU fishing fleet and by the other relevant stakeholders. Ahead of the 2025 report, the MAC adopted advice with several recommendations to DG MARE[3], including on data collection, social variables, national and special chapters, and cooperation with ICES. At the 2 December 2025 Working Group 1 meeting, there was a presentation of the 2025 edition of the report. Under the Work Programme of Year 10 (2025-2026), the MAC committed to deliver advice on the Terms of Reference of the 2026 edition of the Annual Economic Report on the EU Fishing Fleet.

[1] The reports are publicly available on the website of STECF.
[2] MAC Advice on "Data Collection by the Scientific, Technical and Economic Committee for Fisheries (STECF)" (23 September 2020)
[3] MAC Advice on "STECF's Annual Economic Report on the EU Fishing Fleet (2025)" (27 March 2025)

Market Advisory Council
Regus EU Commission, 6 Rond-Point Robert Schuman, 1040 Brussels
www.marketac.eu
secretary@marketac.eu

2. Data collection

Following a call for economic data on the EU fishing fleet, the Expert Working Group (EWG) will analyse and comment on the economic performance of the EU and national fishing fleets between 2008 and 2023, and where possible, 2024 and beyond. Economic data series will be available up to 2024.

In the view of the MAC, the data collection by Member States can be further improved. The Member States should be encouraged to continuously improve the quality and quantity of data. Furthermore, in the view of the MAC, when analysing the data, including the context of the nowcasting and forecasting projections, the experts should also consult stakeholders on the ground to improve the interpretation of the data, identify potential anomalies, and confirm the accuracy of the data through ground truthing.

3. Social variables

The European Commission established a separate annual EWG dedicated to the social dimension, with a separate data call, to publish a report on the social component of EU fisheries. Nevertheless, the Annual Economic Report on the EU Fishing Fleet will continue to cover employment and Full Time Employment data to support the analysis of the economic drivers.

In the view of the MAC, the nature of the industry and the preponderance of part-time and seasonal work can significantly impact the accuracy of the data. Without a good benchmark, it can be difficult to analyse trends. The reliance on official data or extrapolations from survey returns can lead to inaccuracies in the estimations of total employment. Therefore, a detailed survey on employment, every three to five years, via a census approach could potentially be a more appropriate way of monitoring employment developments over the course of time.

4. National chapters

Market Advisory Council
Regus EU Commission, 6 Rond-Point Robert Schuman, 1040 Brussels
www.marketac.eu
secretary@marketac.eu

The report includes specific chapters for each EU Member State. In the view of the MAC, the national chapters provide realistic assessments of the situation in 2023. The projections for 2024 and 2025 also appear to be reasonable.

5. Special chapters

The report can include special chapters on specific topics. In the view of the MAC, a special chapter on the economic impact of the lack of agreement between coastal States on sharing arrangements would be relevant. The chapter should take into account the unilateral setting of inflated quotas by several parties, the impact of the scientific advice for the three stocks – mackerel, blue whiting, Atlanto-Scandian herring, and the impacts on fishing fleets if ICES recommends zero catches for mackerel in 2027/2028. Furthermore, a special chapter on the age of fishing vessels / fleets would also be very relevant.

6. Nowcasting and forecasting projections

In the view of the MAC, the report provides a very useful retrospective of the economic situation of the EU fishing fleet. Nevertheless, due to the two years delay between the data and the publication of the report, with the evolving situation of the fisheries and the corresponding fleets, the relevance of the report for policy decisions becomes limited. Therefore, the forward-looking sections of the report should be further strengthened and become a larger part of the report.

7. Active vessels and activity thresholds

In the view of the MAC, the current definition used in the Annual Economic Report whereby a fishing vessel can be considered as *active for the entire year on the basis of only one day of activity* raises serious methodological concerns. This approach risks significantly overestimating the number of active vessels and distorting indicators related to capacity, effort, economic performance, and environmental impacts. A single day of activity does not reflect sustained

Market Advisory Council
Regus EU Commission, 6 Rond-Point Robert Schuman, 1040 Brussels
www.marketac.eu
secretary@marketac.eu

participation in fishing operations and should not be sufficient to classify a vessel as active for a full reference year. More robust and proportionate criteria should therefore be applied to better reflect actual fishing activity.

8. Temporal coverage of statistics and emissions relevance

In the view of the MAC, the temporal coverage of the statistics used in the report is insufficient. While the Annual Economic Report currently provides data series going back only to 2013 (which coincides with the adoption of the Common Fisheries Policy Regulation), other well-established sources, such as Eurostat and the FAO's "State of World Fisheries and Aquaculture" reports provide comparable data series dating back to 2000 or earlier. This limitation is particularly relevant in the context of greenhouse gas emissions, which are expected to be counted and accounted for from 1990 onwards. The absence of longer historical time series prevents a proper assessment of long-term trends and structural changes in the fleet and undermines the robustness of analyses related to emissions, decarbonisation pathways, and policy impacts.

9. Recommendations

For the 2026 edition of the Annual Economic Report on the EU Fishing Fleet, particularly the development the Terms of Reference for the corresponding STECF EWG, the MAC believes that DG MARE, with the appropriate involvement of STECF, should:

a) In the context of data collection, encourage the Member States to continuously improve the quality and quantity of data;
b) In the context of data analysis, encourage the experts to consult stakeholders on the ground, as a way to improve the interpretation of the data, identify potential anomalies, and confirm the accuracy of the data;

Market Advisory Council
Regus EU Commission, 6 Rond-Point Robert Schuman, 1040 Brussels
www.marketac.eu
secretary@marketac.eu

c) In the context of social variables, promote the undertaking of periodical detailed census surveys on employment every three to five years;
d) Include a special chapter on the economic impact of the lack of agreement between coastal States on stocks sharing arrangements as well as a special chapter on the age of fishing vessels / fleets;
e) Further strengthen and increase the preponderance of the forward-looking sections of the report in comparison with the retrospective ones;
f) Review and revise the criteria used to define an "active" fishing vessel, ensuring that classification for a full reference year is based on a meaningful minimum level of activity rather than a single day of operation;
g) Extend the temporal coverage of statistical series used in the report, where possible, by integrating or aligning with longer-term datasets available from sources, such as Eurostat and the FAO, in order to capture wider historical trends;
h) Ensure that analyses relevant to greenhouse gas emissions and environmental performance are supported by data series extending back to at least 1990, in line with international and EU climate accounting frameworks and the work of UNCTAD.

The MAC is concerned about the decline since 2013 across all socio-economic indicators of the EU fishing fleet, including income, profitability, employment and fleet viability, which underlines the current trend is not meeting the socio-economic objectives of the Common Fisheries Policy.

Market Advisory Council
Regus EU Commission, 6 Rond-Point Robert Schuman, 1040 Brussels
www.marketac.eu
secretary@marketac.eu