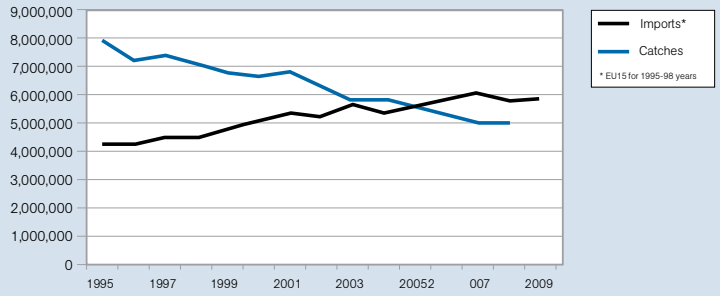
OCEAN2012
Fish Dependence Day - UK

Fish dependence: The EU's reliance on fish from elsewhere

The EU has one of the largest fishing fleets in the world, the largest Exclusive Economic Zone, is the largest importer of seafood and has significant political influence in international bodies protecting the sea. Yet European fish stocks are in an extremely poor state - and its fish consumption continues to rise. The EU is sourcing ever more fish from third countries both through imports and the catches of its distant-water fleet. Europeans are now so dependent on fish products originating from external waters that half the fish they consume are sourced outside the EU. The EU's fleets are fishing further and further afield, putting pressure on fish stocks in distant waters and the communities that depend on those fisheries.

Figure 1: EU27 catches (landings) vs imports, 1995–2009 (tonnes live weight)



Source: Eurostat external trade database – http://epp.eurostat.ec.europa.eu/portal/page/portal/external_trade/data/database

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...EU consumption continues to rise

Each EU Member State sources and consumes different quantities of fish, and so exhausts its domestic fish supply at a different rate. 'Fish dependence' is a measure of a Member State's self-sufficiency - how well it meets domestic demand for fish from its own waters. The 'fish dependence day' is calculated as a calendar date - the day that a Member State exhausts its own fish supply and becomes dependent on fish from outside the EU. For the EU as a whole, this date is July 2nd, which means that almost one-half of our fish consumption depends on fish from non-EU waters. Since 2000, the EU's fish dependence day has occurred earlier and earlier, illustrating its growing dependence on fish products from elsewhere. UK becomes fish dependent on July 17th.

Declining fish stocks

According to some scientists, as much as 90 per cent of the world ocean's large predators have been fished out. At the same time, one billion people rely on fish as an important source of protein. In the EU, the majority of assessed fish stocks are overfished and many are at high risk of depletion. EU catches have declined at an average of 2 percent per year since 1993 (an overall decline of around 25 percent), leading to constantly declining revenues for fisheries dependent communities - 25 percent since the early nineties.

The World Bank has estimated that lost economic yields from the impacts of global overfishing amount to 50 billion US dollars each year.

Rising levels of consumption

Between 1960 and 2007 global fish consumption nearly doubled, rising from 9.0kg to 17.1kg per capita annually. On average, each European citizen consumes even more - a hefty 22.1kg of fish products per year. Indeed, the EU's fish consumption has risen while its landings have declined. In 2007, the total catch in EU waters amounted to just over 4 million tonnes, which is just 38 percent of its total fish consumption (10.7 million tonnes). Two years earlier, the EU caught more than 5.4 million tonnes of fish in its own waters, which was just over one-half of its annual consumption (9.3 million tonnes). The FAO predicts that per capita fish consumption in the EU will continue to increase.

All this highlights that pressure on fish stocks is only likely to increase as the global population continues to grow, reaching a projected nine billion people by 2050.

Catching there, consuming here

Europeans have been able to increase their levels of fish consumption by sourcing fisheries products from outside the EU. This fish has either been caught by the EU's distant-water fleet or imported. In 2006, the EU had 718 vessels fishing in distant waters, only a small fraction of its total fleet, but these vessels caught approximately 20 percent of the EU's total landings. More than one-half of these vessels were Spanish.

In 2007, the EU imported 4.3 million tonnes of fish more than it exported, and its imports comprised an estimated 57 percent of its total consumption. The EU is a highly attractive market for exporters because EU Member States pay the second highest prices for fish in the world - only Japan bids higher.

Farming hope

Europe has also been able to increase its fish consumption through aquaculture (fish farming). Aquaculture presently supplies more than 1.2 million tonnes of fish per year to EU markets. However, marine aquaculture of fin fish has been heavily dependent on caught wild fish for feed, which then increases fishing pressure on marine fish stocks. Farmed shellfish do not depend on wild fish catches, however, unless consumer choices change drastically these molluscs will not be able to compensate for the present demand for farmed fish. Aquaculture has several other challenges, including control of disease in very confined spaces and the danger of diseased fish escaping into the wild.

Estimating fish dependence

The self-sufficiency levels for EU Member States are calculated as the ratio of domestic supply (production) over domestic demand (consumption).

- 'Domestic supply' includes total reported landings per Member State in EU waters, aquaculture production and trade balance (exports minus imports).
- 'Domestic demand' includes total reported landings in all regions plus imports minus exports.

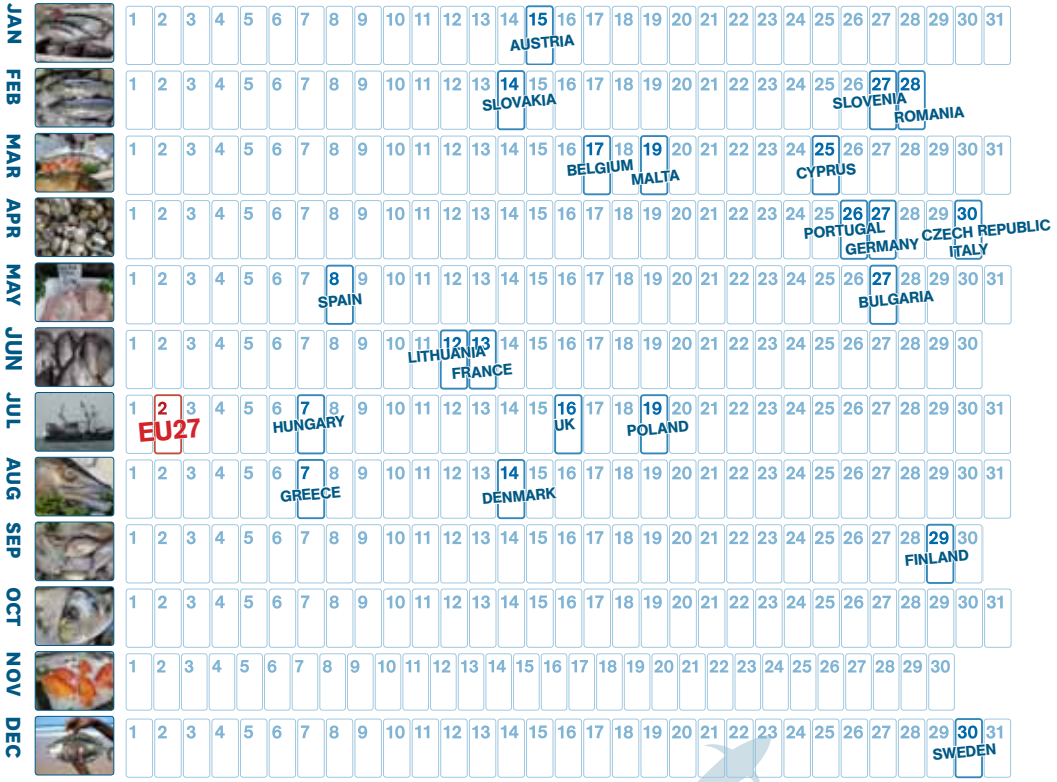
A Member State's 'fish dependence day' is then calculated by multiplying its self-sufficiency level by 365, then finding the corresponding date in the calendar year.

$$\text{Self-sufficiency} = \frac{\text{catches in EU waters} + \text{aquaculture production}}{\text{apparent consumption}}$$

Member States differ in their levels of self-sufficiency. Those with little or no access to EU marine waters, such as Austria, Slovakia and the Czech Republic become fish-dependent earlier. Surprisingly, though, this is also the case for some Member States with access to EU marine waters; these include Spain, Portugal, Italy, Germany and France, all Member States that source more than one-half of their fish from non-EU waters.

For the UK the degree of self-sufficiency went down from 59.2 percent to 53.8 percent over the past year meaning it is becoming more dependent on fish from outside the EU; this is illustrated by its fish dependence day occurring earlier in the year – from August 4th in 2006 to July 16th in 2007.

Fish dependence day calendar 2011



How to match consumption with supply

Rising fish consumption in a context of declining stocks is a model that is environmentally unviable and socially questionable. Finite resources, along with growing populations, make the current EU model of consumption unsustainable. The EU's growing fish dependence has significant implications for the health of global fish stocks; and, if these are overfished, it will also impact negatively on local dependent communities.

The EU has potentially highly productive waters that, if managed responsibly, could deliver a stable supply of fish and related socioeconomic benefits. The reform of the EU's Common Fisheries Policy (CFP) offers a unique opportunity to initiate this responsible management. The new CFP needs to stop overfishing, end destructive fishing practices and deliver fair and equitable use of healthy fish stocks.

Restoring the health of European fish stocks to levels where they can be sustainably fished and consuming only what we can safely fish is the way to stop this growing dependence

This briefing is based on a **nef** report: *Fish Dependence*. Go to: www.neweconomics.org/projects/fisheries

OCEAN2012 is an alliance of organisations dedicated to transforming European Fisheries Policy to stop overfishing, end destructive fishing practices and deliver fair and equitable use of healthy fish stocks.

OCEAN2012 was initiated, and is coordinated by, the Pew Environment Group, the conservation arm of The Pew Charitable Trusts, a non-governmental organisation working to end overfishing in the world´s oceans.

The steering group of OCEAN2012 consists of the Coalition for Fair Fisheries Arrangements, Ecologistas en Acción, The Fisheries Secretariat, **nef** (new economics foundation), the Pew Environment Group and Seas At Risk.

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