

FISHERY COUNTRY PROFILE	Food and Agriculture Organization of the United Nations	FID/CP/BEL
PROFIL DE LA PÊCHE PAR PAYS	Organisation des Nations Unies pour l'alimentation et l'agriculture	 January 2005
RESUMEN INFORMATIVO SOBRE LA PESCA POR PAISES	Organización de las Naciones Unidas para la Agricultura y la Alimentación	

THE KINGDOM OF BELGIUM

GENERAL ECONOMIC DATA

Area:	30,519 km ²
Shelf area (to 200 m):	4,100 km ²
Length of coastline:	66 km
Population (2003):	10.2 million
GDP (2003):	US\$ 347 billion
Agricultural GDP (2003):	1.3% of GDP

FISHERIES DATA

Commodity Balance (2001):

	Production	Imports	Exports	Stock variation	Total food supply	<i>Per caput supply</i>
	tons live weight					kg/year
Fish for direct human consumption	15,653	426,053	223,019	0	218,687	20.4

Non-food uses	16,186					
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Estimated employment (2002):	
Fisheries:	
full time:	623
part time:	277
Processing:	1,415
Landings in Belgian harbours (2003)	US\$ 101 million
Landings in foreign harbours (2003)	US\$ 16 million
Trade (2003):	
Value of imports:	US\$ 1,387 million
Value of exports:	US\$ 763 million

STRUCTURE AND CHARACTERISTICS OF THE FISHING INDUSTRY

In 2003, the Belgian fishing fleet consisted of a total of 125 motorized vessels, with a total power of 66 869 kW and a gross registered tonnage of 23,794. The fleet consists mostly (97 per cent by engine power) of beam trawlers, the remainder being otter trawlers. About half the beam trawlers are of small to medium size, up to 300 hp (<221 kW). The main fishing grounds of the Belgian marine fleet are the southern and central North Sea. In 2003, catches there amounted to 45 per cent of total catches. Other important fishing grounds are the English Channel (27 per cent), and the Celtic Sea (19 per cent) and the Irish Sea (9 per cent). In 2003, total landings stood at 23,309 tons.

Apart from recreational anglers, there are no commercial inland fisheries in Belgian waters of significance. Aquaculture production in Belgium is rather small. Nevertheless, there is production of trout, carp, tilapia, clarias, European eel, seabass and seabream.

Marine fisheries

Catch profile

In the period 1950 –1970, landings by Belgian vessels mounted to approximately 50,000 tons of which 90 per cent was landed in Belgian harbours. During the period 1986-1990 landings were relatively stable at around 35,000. In 2003, total landings stood at 26,320 tons. In terms of value, landings dropped about 25 per cent (constant prices) over the same period. By far the most important species in value is sole, representing 49 per cent of the total landing value in 2003, although only 21 per cent of the landing volume. Plaice, in

contrast, contributed 26 per cent by volume but was only 14 per cent of the total in value. The most valuable species in 2003 was turbot: less than 2 per cent of the landings represented 5 per cent of the value. Cod, the fourth most important species, represented 7 per cent of the landings by volume and nearly 5 per cent by value.

Landing sites

There are only three fishing harbours in Belgium. Zeebrugge, on the northern end of the North Sea coast, is the most important. Oostende, south of Zeebrugge, is second and Nieuwpoort, near the French border is third in terms of landing volumes and values. In 2003 the landings at Zeebrugge stood at 13,627 tons and accounted for 69 per cent of the total returns realised by Belgian vessels in Belgian ports, or 58 per cent of the total returns realised by Belgian vessels in all ports. In Oostende the landings stood at 6,184 tons. Only 296 tons were landed in Nieuwpoort. Belgian vessels landed about 3,500 tons in foreign, mostly Dutch, harbours.

Fishing units

In 2003, the Belgian fishing fleet consisted of a total of 125 motorized vessels, with a total power of 66,869 kW and a gross registered tonnage of 23,794. In 1950, 457 vessels totalled 44,426 kW and 26,341 GRT. There was rapid and significant decrease in the number of vessels in the period to 1980. During the 1980s the number of vessel was relatively constant. In the 1990s the numbers dropped again. Total power and tonnage changed much less. Average power and tonnage per vessel therefore increased significantly (from 97 kW and 58 GRT in 1950 to 535 kW and 190 GRT in 2003).

The Royal Decree of 21.06.94 divides the fishing fleet in two segments. The small vessel segment (characterised by an engine power up to 221 kW) accounted for 61 vessels but only 20 per cent of total power. The large segment (engine power above 221 kW) counted 64 vessels and 80 per cent of total engine power and tonnage.

Beam trawlers accounted for 97 per cent of the total engine power. These target essentially flatfish (sole, plaice but also turbot, brill, dab, lemon sole etc.).

Fishery areas

In terms of tonnage three fishing grounds account for 70 per cent of all landings by Belgian vessels. The most important one is the eastern English Channel (26 per cent of all landings by volume). The southern and central North Sea accounted each for approximately 22 per cent. Species targeted in the North Sea are sole, plaice, cod, whiting, dab, turbot, lemon sole and rays. The second most important fishing ground for sole is the eastern English Channel. Shrimp trawlers, from March to May, also fish for sole, and in wintertime for roundfish.

During the year, the fishing fleet switches between fishing grounds. One reason is that the quotas are spread out over the different fishing grounds. This has the advantage that eventual restrictions do not affect all quotas in same manner. However it increases significantly the sailing time to and from the fishing grounds.

Inland fisheries

Apart from recreational anglers, there are no commercial inland fisheries in Belgian waters of significance.

Aquaculture

Aquaculture production in Belgium is rather small, approximately 1,600 tons in 2002. The

species produced are trout, carp, tilapia, catfish, European eel, seabass and seabream.

UTILIZATION OF THE CATCH

Fish consumption

In Belgium per caput fish consumption is quite stable at around 20 kg per year. In terms of volume shellfish dominate with 50 per cent. Mussel's account for two thirds of this volume.

The consumer expenditure on fish products accounted for 6 per cent of total food spending in 2001. Some 56 per cent of this expenditure is on fish products goes on fresh fish and shellfish.

Processing

The total production in 2002 of the fish processing industry amounted to 58,367 tons, valued at EUR 364 million.

	tonnage	1000 Euro
Frozen fish products (total)	5 600	39 473
Frozen fish filets	3 612	24 517
Dried, salted, smoked fish (total)	4 813	44 816
Smoked salmon	2 433	30 882
Other smoked fish (excl eel and salmon)	1 733	12 199
Other fish products, caviar	21 781	92 773
Frozen, dried, salted shellfish	8 397	69 378
Shellfish, prepared, canned	10 164	52 883
Total processed seafood products	58 367	363 493

Fish markets

In 2003, the supermarkets had 78 per cent (in volume) of the market for fish and shellfish for home consumption. Retails shops accounted only for 13%. The balance is bought on open markets.

FISHERIES SECTOR PERFORMANCE

Economic role

From the perspective of the national economy, the fishing industry is of marginal importance. Its share in the national GDP and contribution to employment is almost negligible, being fractions of per centages. However, fish trade has become increasingly important and continued to grow significantly during the last decade.

The number of fishing vessels in Belgium has steadily declined since the 1950s, from around 450 then to 125 in 2003. Consequently, the numbers of fishing trips and days at sea have declined. Even though the average capacity of the vessels has increased

dramatically (from 100 GRT and 300 in the late 70's to 190 GRT and 435 kW in 2003), the total landings per day at sea have actually declined by approximately 10 per cent (910 kg/day in 2003). In 2003 the total value of the landings by Belgian vessels was 25 per cent lower in present value terms than at its peak in the mid-eighties.

Trade

Belgium's degree of self-sufficiency in fisheries products is very low. In 2001 imports were over fourteen times higher than actual landings (253,000 tons against 18,000 tons).

Even though a large share of the local production is consumed fresh domestically, Belgium is a major fish-trading nation. A substantial part of the landings, and of fish imports, is exported. It concerns mainly sole, cod, whiting and plaice. Total exports in 2003 amounted to 144,753 tons, with a total value of US\$ 763 million). In the same year, imports of fish products amounted to 284,763 tons valued at US\$ 1,387 million).

The traded fish and fish products are mainly fresh and chilled, and shellfish in processed or fresh form. In 2002, 11 per cent of the imports and 13 per cent of the exports in volume were fresh or chilled fish. In value, it represented 7 per cent of the imports and 10 per cent of the total exports. In the same year, shellfish accounted for 31 per cent of the volume of imports and 36 per cent of the value. Also in export volume and value, shellfish contributed in 1997 a major share: 27 per cent and 35 per cent respectively.

The major importers of Belgian fisheries products are The Netherlands, France, Denmark and Germany. Together they account for 48 per cent of all imports by volume. The major export markets are the Netherlands and France which together take up 64 per cent of all exports.

Employment

The number of fishermen in 2002 was 900 of which only 623 were full time fishermen. The fish processing industries employ 1,415 persons. The Ministry of Flanders estimates that a further 6,000 persons are employed in ancillary activities.

FISHERY SECTOR STATUS AND DEVELOPMENT

State of the fishing industry and constraints

To a large extent, any development prospect for Belgian fisheries is dependant on the common fishery policy of the European Union.

The major constraints faced concern the accessibility of fishing grounds, the overexploited status of some key stocks and the control of costs. The beam trawlers in particular have felt strong negative impacts of the EU cod recovery plans. This limited the number of sea days at 14 days per month on most of the fishing grounds in 2004.

Exploitation costs are high due mostly to high fuel costs. Income is limited by quota and effort limitations. The reduction in landings is only partly compensated by higher prices. This reduced profitability translates into reduced investment in the renewal and modernisation of the fleet, which is ageing. Recruiting crew is also becoming increasingly difficult. Vessel owners have now to compete with other offshore activities for employees.

Further drops in quotas and increased effort restrictions are likely. This will affect not only the quota species but also the fisheries that take them as by-catch. This will be mostly felt in the Western Waters.

The granting of a fisheries license requires a proven economic link with the Belgian coastal

region. This is likely to explain the steady reduction in landings by Belgian vessels in foreign harbours.

Fisheries management

Belgium is a federal state and fisheries fall under the jurisdiction of the regional governments.

Marine fisheries

Marine fisheries fall under the jurisdiction of the Flemish government. Regulations governing maximum fishing effort are implemented by ICES area, and measured by capacity of vessels and days at sea. The quotas are set per stock per country, and are derived from the Total Allowable Catch (TAC) values. These quotas are exchangeable between Member States and Belgium negotiates with neighbour countries, in particular, on quotas for cod, plaice, sole and herring. The quota swap with the Netherlands for herring seems especially favourable for both countries. Since 1997, the quota have been imposed with more flexibility, meaning that exceeding a quota in one year can be balanced by a correspondingly reduced quota the next year (with or without penalty) and that unused quotas (up to a maximum of 10 per cent) can also be transferred to the next fishing season. The EU structural policy for the fishing sector is designed to structurally reverse the situation of overcapacity. Re-structuring programmes are implemented on a six-year basis.

Apart from the EU TACs and quotas, the Flemish government enforces national restrictions of maximum catches per calendar day. In a number of fisheries a new system is being tested (North Sea: sole and plaice; Western waters: cod). The quota allocation is divided over a longer period and takes into account the engine power of the vessels. The Sea Fisheries Service and the vessel owner's association quota commission will evaluate this in late 2004.

Inland fisheries

Jurisdiction over inland fisheries lies with the regional governments. These are responsible for the legislation, restocking, licensing and control. They also offer technical expertise in aquaculture.

RESEARCH

Formal responsibility for marine fisheries research in Belgium lies with the Department of Sea Fishery of the Centre for Agricultural Research. The Department of Sea Fishery is a public research organization with 40 staff. It also coordinates the exchange of research results within and to the Belgian fishing industry. The Department hosts meetings with the fishing and fish processing industries and is responsible for the dissemination of information to the industry.

The Department's management studies focus on four main areas:

- annual surveys in spawning and nursery areas along the Belgian coast, in collaboration with other European institutes, to estimate the strength of the incoming year-classes, and annual surveys with a research vessel to measure the distribution and abundance of commercial flatfish;
- studies on pollution from sea sand extraction and dredging operations;
- physical and chemical monitoring of water quality; and
- biological monitoring of fish health and biochemical effects of contaminants.

The aim of the programme is to enhance fishery management and optimize potential catches by the Belgian fleet. It focuses on the major commercial species: sole, plaice, cod and whiting.

The Department's research programme studies: fishing gear improvements from a technical, biological and economic point of view; selectivity and technical affects of fishing; and the relation between fishing effort and technical vessel and gear characteristics.

The Department's quality research programme is oriented to the development of reliable and objective quality determination methods for fishery products and the study of factors influencing quality. Specific research on fish and shellfish (mussels) diseases is also carried out. These studies focus on wild stocks, but the results may also be applicable to cultured stocks.

The Department of Sea Fishery cooperates with several other European institutes, in particular with institutes in Germany, the United Kingdom, the Netherlands and France. It has agreements with institutes in these countries as well as with one in Denmark and one in Ireland. It participates on several international platforms, such as the International Council for the Exploration of the Sea (ICES), the EU Scientific, Technical and Economic Committee for Fisheries (STECF-EU), the Commission for Conservation of Antarctic Marine Living Resources (CCAMLR), the Convention for the Protection of the Marine Environment of the North-Eastern Atlantic (OSPAR), the London Dumping Convention (LDC) and the Convention on the Prevention of Marine Pollution by Dumping of Wastes and other Matter. Belgium holds the secretariat of the European Aquaculture Society (EAS), an international non-profit organization with 58 member countries.

The Institute for Marine Scientific Research (IZWO) has now been reorganised as the Flanders Marine Institute (VLIZ). The main task of the VLIZ is supporting and visualising scientific research in the coastal area. By doing so, it developed a co-ordination forum, an oceanographic platform and the Flanders Marine Data and Information Centre. The VLIZ acts as a co-ordinating and information platform for marine sciences in Flanders. VLIZ hosts the Flanders Marine Data and Information Centre, and deploys the vessel Zeeleeuw for oceanographic research. Furthermore, the institute acts as contact point and provides advice on demand of the government and on its own initiative. The VLIZ contributes also in popularising science, in sensitising and further expanding our marine multi mediacentre. The VLIZ has an interface function between the scientific community, the public authorities and the public at large.

Inland fisheries

Regional governments have their own inland fisheries research institutes, the Institute for Forestry and Game Management in Flanders and the Services Extérieurs de la Pêche in Walloonie.

INTERNET LINKS

Central Council for the Economy: <http://www.ccecrb.fgov.be/>

Flanders Marine Institute: <http://www.vliz.be/>

Flemish Government – Department for Sea Fisheries: <http://www2.vlaanderen.be/ned/sites/landbouw/wieiswie/clo.html#zeeverisserij>

Flemish government – Marine Fisheries Service: <http://www2.vlaanderen.be/ned/sites/landbouw/visserij/index.html>

Institute for Forestry and Game Management: <http://www.ibw.vlaanderen.be/ibw/ibw.html>

National Bank of Belgium: <http://www.bnb.be/sg/index.htm>

National Institute for Statistics: http://statbel.fgov.be/home_en.asp

Walloon Government – Division Nature and Forest: <http://mrw.wallonie.be/dgrne/dnf/>