

**STECF EXPERT WORKING GROUP EWG-17-16**  
**2017 REPORT ON THE PERFORMANCE OF THE EU FISH PROCESSING INDUSTRY**

**15-19 January 2017**

**Background and general objectives**

- Following the 2017 DCF call for economic data on the EU fish processing sector, EWG 17-16 is requested to analyse and comment on the economic performance of the EU and national fish processing sectors between 2008 and 2015 (2016 if available).
- The fish processing report is one of the main sources of economic and social data for scientific advice on the performance of the EU fish processing industry. It is also increasingly used by scientific bodies, national administrations and international institutions.
- In view of the above, the 2017 should provide a more in-depth look at the different factors driving the economic performance of the EU fish processing industry with a special focus on the major drivers and issues affecting this sector.
- Building on the successful experience of the 2017 economic report of the fishing fleet, the 2017 report on the economic performance of the EU fish processing sector will follow a more analytical approach. It will contain qualitative information and analysis on the drivers and trends in the fish processing performance and other aspects of policy relevance based largely on the scientists' expert knowledge.

Experts will be asked to analyse the sector, e.g. by markets and trade determinants by main segments of processing activities, competitiveness, market prices and consumption, certification, innovation, links with the local fishing fleet and aquaculture sector, the role of European Maritime Fisheries Fund support, contribution to the local communities and the Blue Economy, strengths, weaknesses, opportunities and threats.

- Given the social importance of this activity in many communities, particular emphasis should be paid to the social aspects of the analysis including trends on employment, salaries, labour productivity and female/male breakdown of the fish processing employment.
- The main socio-economic indicators, if possible and where relevant, should also be put into context with homologous figures at the EU and national levels, e.g., national average salaries, GDP, etc.
- The two main objectives for the 2017 exercise are to increase qualitative interpretation of all data outputs and to increase the usefulness of the report for DG MARE's policy development as well as for member states and the industry.

The final draft EWG report will be reviewed by the STECF during its spring plenary meeting in 2018.

**Specific objectives**

EWG 17-16 is requested to work on and comment, at least, on the following items:

The 2016 report on the economic performance of the EU fish processing sector shall include, at least, the following sections:

- A summary containing key findings.
- EU fish processing sector economic overview including drivers and main trends based on expert knowledge. It must include specific sections on employment (e.g. female/male employment and

average salaries), economic performance contrasting SMEs and non-SMEs (when data is available) and productivity/employee at EU level as well as a brief summary for each national chapter. The indicator Future Expectations of the Industry and other relevant indicators may be added.

- National chapters on the economic performance of the fish processing sector providing:
  - National fish processing sector overview (including recent developments)
  - Economic performance indicators
  - Performance by size category (e.g. contrasting SMEs and non-SMEs when possible)
  - Employment (Female/male employment, labour productivity and average salaries)
  - Description of trends and drivers based on expert knowledge.
  - Outlook
  - Data coverage and quality
  
- **Special Chapter** Comparison of the data and indicators of the DCF and Eurostat's Structural Business Statistics.
  - Propose recommendations to build future fish processing reports using Eurostat data as the main source of data and complemented by DCF data if available.
  - Discuss the main differences across both datasets.
  - Discuss feasibility of potential improvements to the report (e.g. use of PRODCOM data, reporting and analysis by products/segments).

## **ANNEX**

### Relevant documents

- . STECF 14-21 - Fish Processing Sector (<http://stecf.jrc.ec.europa.eu/reports/economic>)
- . STECF-PLLEN 14-03 (<http://stecf.jrc.ec.europa.eu/reports/plenary>)