

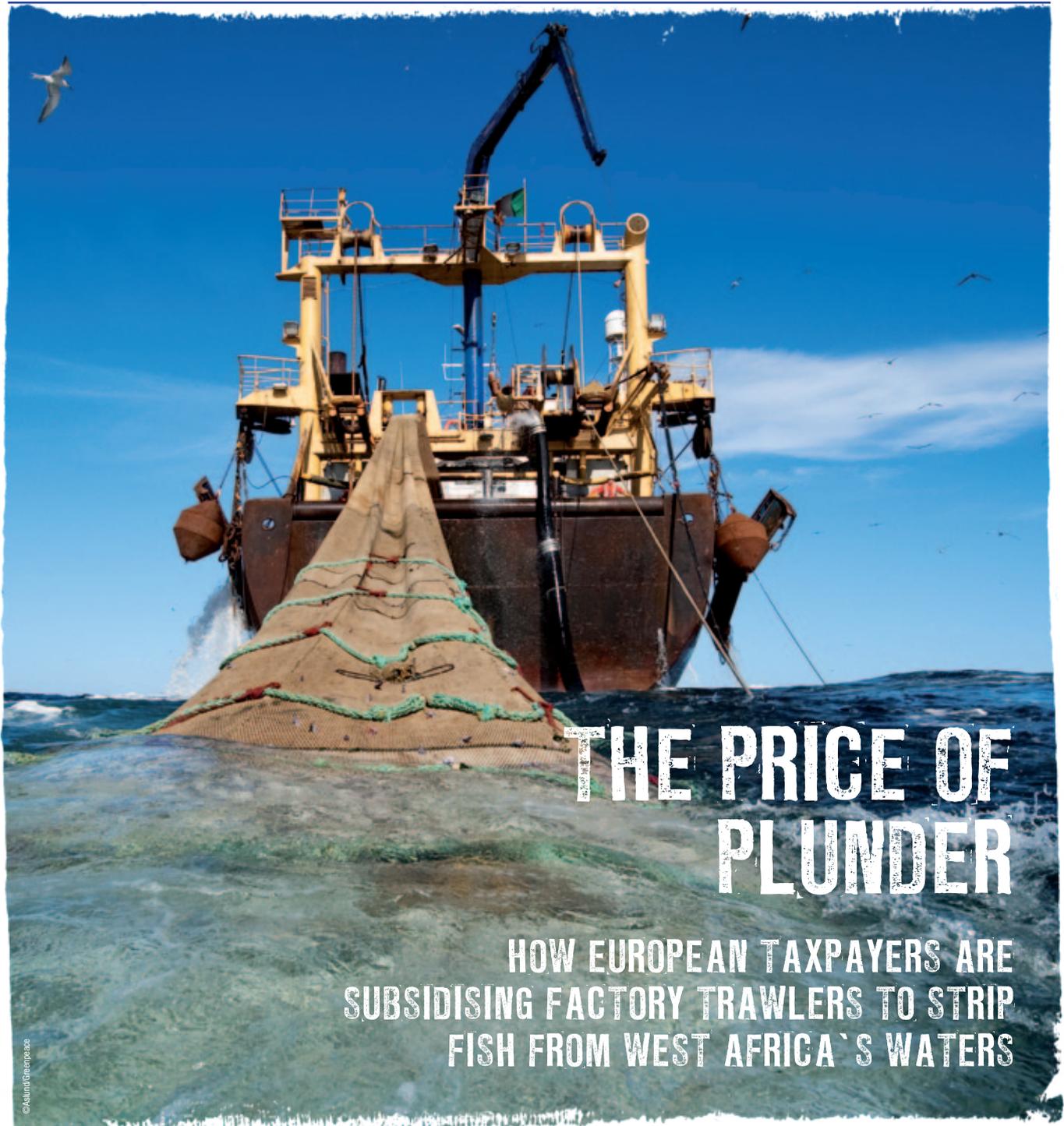
OCEAN

GREENPEACE

INQUIRER

EXPOSING SEA CRIMES

ISSUE #3 - FEBRUARY 2012



THE PRICE OF PLUNDER

HOW EUROPEAN TAXPAYERS ARE
SUBSIDISING FACTORY TRAWLERS TO STRIP
FISH FROM WEST AFRICA'S WATERS



A NUMBERS GAME

THE PROBLEM IS SIMPLE: WE ARE OVERFISHING OUR SEAS

‘Our fleet is “obese” – and our efforts to slim it down has not given us results. Wasting tax-payers’ money in harmful subsidies has to stop. We need to reduce overcapacity and shrink the fleet.’

EU Fisheries Commissioner Maria Damanaki¹

The fundamental problem facing Europe’s fishing industry is overcapacity: its fleet is catching far more than current fish stocks can bear. Under the broken governance of the European Common Fisheries Policy (CFP), Europe’s waters have been overfished and its governments have done little to curb the destructive power of their bloated fleets.

As the CFP undergoes crucial reform, Greenpeace is publishing the Ocean Inquirer, revealing the misguided management of Europe’s fisheries, funded by EU taxpayers under the CFP. Previous issues of the Inquirer exposed the fishy business of how Spain funds the illegal activities of a prominent part of its industrial fishing fleet², and how Spain and France have channelled EU subsidies to support highly destructive deep sea bottom trawling.³

In this edition, we reveal how the EU and EU member states are seeking to evade the issue of European overfishing by shipping the problem overseas. We show how they are using taxpayers’ money to subsidise powerful European industrial vessels to expand into the fishing grounds off West Africa and in the Pacific, encouraging the plunder of the waters of some of the world’s poorest countries. To illustrate the damaging effects on the regions’ fish stocks and coastal communities, we focus on one industrial fleet, sailing

under the banner of the Pelagic Freezer-Trawler Association (PFA), which consists of 34 factory trawlers that are among the biggest and most powerful in the world.

But it’s not too late to turn the tide. The EU can create sustainable and equitable fisheries if it seizes this once-in-a-decade opportunity to radically reform the CFP. Greenpeace calls on EU governments and the European Parliament to show leadership by preventing the European fleet from destroying our common oceans and the communities who rely on them.



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THE PRICE OF PLUNDER: THE FACTS

A TALE OF GREED AND WASTE PAID DIRECTLY BY YOU



Unwanted bycatch of demersal species, including sharks, on board PFA trawler in Mauritania

- Almost a quarter of the total EU catch is now captured in international waters and the national waters of foreign countries, including West Africa.⁴
- Europe sends some of the world’s biggest and most powerful trawlers into the waters of West African countries, including at least 16 from the Dutch-based Pelagic Freezer-Trawler Association (PFA).
- Most commercial fish stocks in West African waters are now fully exploited or over-exploited.⁵
- It would take 56 traditional Mauritanian pirogue boats one year to catch the volume of fish a PFA vessel can capture and process in a single day.⁶

- There are about 1.5 million artisanal fishermen along West Africa’s coast.⁷ Millions more local people depend on work in fish processing, construction and maintenance of fishing vessels, transport and markets.
- The amount of fish discarded at sea, dead or dying, during one PFA trawler’s fishing trip at full capacity is the same as the average annual fish consumption of 34,000 people in Mauritania.⁸
- In the past 15 years, bycatch from around 20 EU pelagic trawlers in Mauritania has killed an estimated 1,500 critically endangered turtles, more than 18,000 big rays including endangered manta rays, and more than 60,000 sharks including endangered hammerhead sharks.⁹
- The EU paid an estimated €142.7 million to secure fishing rights for PFA vessels in Mauritanian and Moroccan waters between 2006-2012.¹⁰ EU taxpayers pay more than 90% of the access costs to allow these companies to fish.¹¹

AN ABJECT FAILURE

WHY THE COMMON FISHERIES POLICY JUST ISN'T WORKING

'European fish stocks have been overfished for decades and the fishing fleets remain too large for the available resources. This combination means that too many vessels chase too few fish and many parts of the European fleet are economically unviable.'

European Commission, Reform of the Common Fisheries Policy Green Paper¹²

The supposed objective of the current Common Fisheries Policy is to manage the exploitation of living aquatic resources in a manner that ensures sustainable economic, environmental and social conditions. But in the more than 40 years since it was established, the CFP has systematically failed to achieve these goals. Instead, it has protected the short-term interests of the worst kind of industrial European

vessels through subsidies and unsustainably high fishing quotas¹³, including supporting their expansion into foreign waters. This has resulted in an environmental disaster, poor economic performance and decreasing social stability and job opportunities.

The European Commission has acknowledged this failure. One of the expert assessments commissioned by

the European Commission even went as far as to conclude that the CFP is 'in denial of the basic principles of sustainable development' and causes 'an excessive fishing pressure [that] has eroded away the present and future productivity of the fish stocks'.¹⁴

The current CFP has failed to keep the power and catch capacity of the EU's fishing fleets at sustainable levels and has not done enough to promote the benefits of low-impact, small-scale fishing.¹⁵ Without a major overhaul, the future of coastal fishing communities looks bleak. The CFP reform offers a crucial opportunity to end overfishing and begin the transition to sustainable, low-impact practices.

IN THE EU OVERALL, SMALL-SCALE FISHERIES HAVE ONLY BEEN ALLOCATED AROUND 20% OF THE FISHING OPPORTUNITIES, DESPITE THE FACT THAT THEY REPRESENT 80% OF ALL FISHERMEN IN THE EU.¹⁵

A QUESTION OF SCALE

Not all fishing methods affect the environment to the same extent. There are a range of direct impacts on marine species and habitats, and indirect impacts caused by, for example, greenhouse gas emissions. While not all small-scale fishing is low-impact, overall, small-scale fisheries tend to have lesser environmental effects, with lower discard rates, than large-scale industrialised fisheries.¹⁶ Many small-scale or artisanal fishermen use more selective, passive gears, and need much less fuel.¹⁷ Small-scale fisheries also employ more people for the same value in terms of catch, and provide social, cultural and economic benefits that sustain coastal communities.¹⁸



SHIPPING THE PROBLEM OVERSEAS

HOW EUROPE'S BLOATED FLEET IS GORGING ON FOREIGN FISH STOCKS

'[The quota reduction for the blue-whiting fisheries] in European waters could mean that we have to reduce our efforts in EU and North East Atlantic Fishery Commission waters by as much as three vessels, for which we have to find alternative opportunities by adding them to our vessels off Mauritania and in the South Pacific.'

Gerard van Balsefoort, PFA president²⁰

Parts of the European fleet are capable of catching two to three times more fish than the stocks they target are capable of naturally replacing²¹, putting future productivity at risk. This structural imbalance is one of the main challenges for the EU's fishing industries, according to the European Commission.²²

Recent attempts to shrink this overcapacity have been far too timid: on average, fleets have been reduced by only 2-3% a year since the last reform in 2002, but this has been offset by increases in fishing power through technological improvements and increased efficiency in the fleet.²³

The combination of overcapacity and overfishing makes the fleet vulnerable to external economic pressures, and short-term interests have eroded the long-term economic viability of the sector.²⁴ But instead of tackling the problem, EU governments have sought to displace it by buying access to foreign fishing grounds through Fisheries Partnership Agreements (FPAs), thereby giving their huge, destructive vessels a mandate to continue fishing.



THE SCRAMBLE FOR AFRICA

HOW POOR COMMUNITIES ARE BEING SOLD OUT BY FOREIGN INVADERS

'There are just too many boats out there. Ten years ago I just went out for the day and got my catch. Now I have to go much further, for as long as two weeks, and still my catch is declining.'

The West African region lacks an effective fisheries management system. There are no means to adequately enforce marine laws, and scientific knowledge of the area and its fish stocks is limited. Local governments have been unable to establish the infrastructure necessary to develop sustainable local fisheries that would enable coastal communities to trade fish with Europe and the rest of the world.

Since the 1960s local communities have witnessed the arrival of huge, destructive fishing vessels from Asia, Russia and the EU. When these first arrived there was less competition for resources with local fishermen, as stocks were plentiful and fewer local people relied on fishing for food and income. But as foreign fishing nations increased their presence catches declined and local governments grew dependent on the income received

by selling fishing rights to foreign countries and corporations.

Since 1990, the once-abundant waters have seen a steady decline of fish stocks²⁶, with most now fully exploited or over-exploited.²⁷ Today, EU vessels catch 235,000 tonnes of small pelagic species annually from the waters of Morocco and Mauritania, the largest EU fishery in foreign waters.²⁸ Local fishermen see their catches shrinking and their costs and workload rising. They are forced to travel further to catch fish and often have to compete for space with the industrial trawlers in dangerous waters unsuitable for their small boats, increasing the risk of deaths on the open sea.²⁹

Fish is a primary protein source for people along West Africa's coastline. A collapse of West Africa's marine resources would have catastrophic effects for the region.

'IT'S CROWDED HERE WITH SMALL, BLUE MOROCCAN FISHING BOATS. ...EVERY NOW AND THEN WE FIND THEIR SMALL FISHING GEAR IN OUR NETS... THE FISHERMEN OFTEN GET VERY CLOSE IN AN ATTEMPT TO SAVE THEIR FISHING LINES.' PFA trawler deckhand on his blog³⁰

SEA MONSTERS

THE PFA'S FLEET OF FACTORY TRAWLERS ARE AMONG THE BIGGEST IN THE WORLD

'Yesterday we even managed to rake in 200 tonne of fish (indeed... 200,000 kilos of fish). In one haul... Mackerels, horse mackerels and sardines. I believe we won't leave this place before we have completely filled the boat.'

Blog by crew member of PFA vessel Dirk Diederik in South Morocco³¹

The PFA represents the interests of nine European companies based in the Netherlands, the UK, France, Germany and Lithuania.³² They are all related to three Dutch companies: Parlevliet en van der Plas, Cornelis Vrolijk/Jaczon and Willem van der Zwan & Zonen. Together the PFA companies operate 34 pelagic freezer trawlers. Their combined average annual revenues in 2007-2009 were approximately €490 million, with estimated profits around €55 million.³³

These companies catch, process and trade pelagic species – that is, fish living in the water column – such as herring, mackerel, horse mackerel, sardines, sardinellas, silver smelt, blue whiting and Pacific jack mackerel.³⁴ Several of these fisheries in the north-east Atlantic, West Africa and the Pacific are unsustainable.³⁵

The PFA vessels are among the biggest fishing vessels in the world. PFA trawlers dominate the list of the EU's top 20 fishing vessels in terms of length, engine power and gross tonnage. Their Dutch-flagged Annelies Ilena is the largest and most powerful fishing vessel in the EU fleet.³⁶

PFA vessels can continue fishing for weeks, because many have an enormous holding capacity (often more than 6000 tonnes³⁷) and transfer their catches to

support vessels while at sea. The vessels use enormous trawl nets up to 600 metres long that can have an opening of up to 200 by 100 metres.³⁸

The PFA fleet is also equipped with sonar and satellite equipment, which enables them to locate schools of fish within a 3km radius. During the search, the vessels tend to work together to cover vast distances. The entire Mauritanian fishing zone, for example, can be screened within a few days.³⁹

PFA vessels can catch and process around 200-250 tonnes of fish per day, in their on-board factories.⁴⁰ When the trawl net is brought alongside the stern of the vessel, fish are pumped into refrigerated seawater tanks in the vessel where they are chilled. The fish are then pumped to grading machinery, and subsequently transported by conveyor to plate freezers where they are frozen into blocks weighing 20-22 kg, depending on the grade of fish.⁴¹

MEASURING CAPACITY

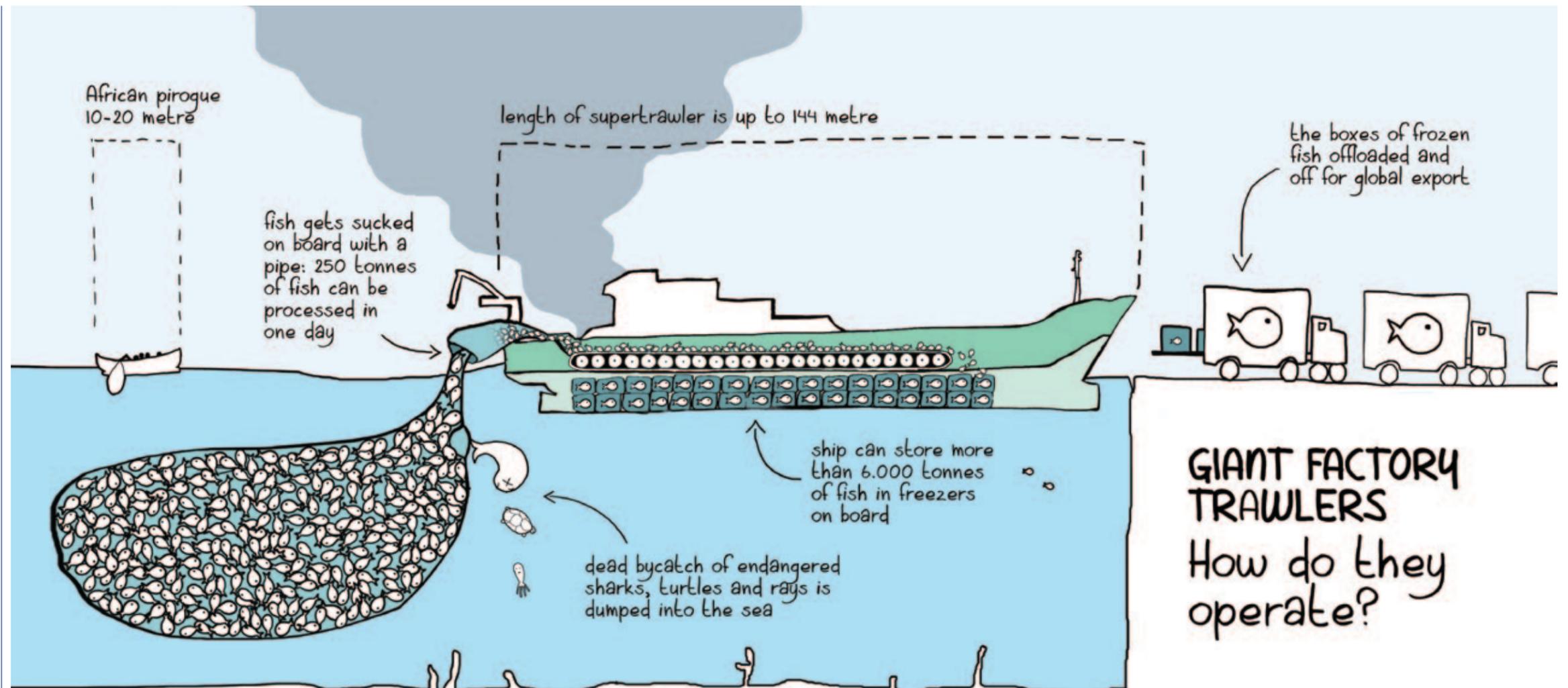
Fishing capacity essentially describes the ability of a fishing vessel or fleet of vessels to catch fish. The main factors affecting fishing capacity are:

- vessel characteristics, such as the tonnage and overall holding capacity, engine power, freezing capacity etc;
- fishing gear characteristics, generally considered in two groups – active gears, in particular trawl nets, and passive gears, such as gill nets and pots;
- operational characteristics, such as distance to fishing grounds, available fish-finding technology such as sonar, the price of fuel, biology of the species and even the experience of the crew.



Consequently, the measurement of true fishing capacity is a complex calculation, combining technical characteristics alongside economic and biological factors. Therefore, gross tonnage and engine power are often used as a rough indicator of fishing capacity. Another important factor influencing how much a fishing vessel can catch is the time it spends fishing or the number of hooks and size of

nets it uses – the so-called fishing effort. To get a full picture of the potential impact of a fishing fleet on the resource, one should therefore take into account the multiple factors affecting real fishing capacity, combined with fishing effort and the number of vessels employed. Last but not least, it is necessary to consider the specific characteristics of the ecosystem and its fragility.





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HOW THE PFA WENT GLOBAL

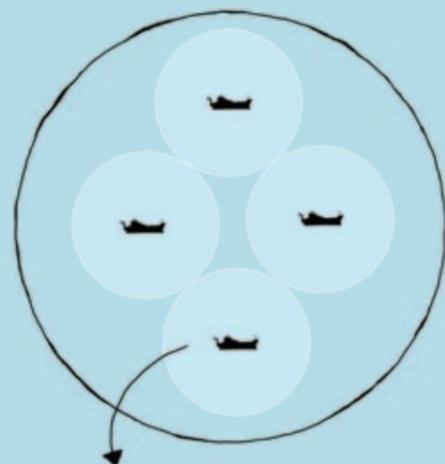
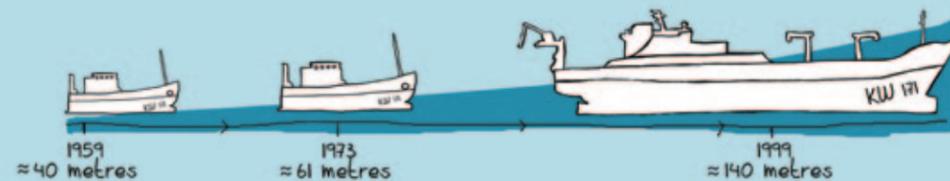
The PFA fleet has its origin in Dutch companies operating in the North Sea herring fishery. When herring fishing was banned in the region between 1977 and 1983 after overfishing caused stocks to collapse,⁴² the companies today represented by the PFA began to hunt for new fishing grounds. Technological advances opened up new geographical possibilities. The vessels' cooling installations, for example, were replaced by freezing installations, enabling them to stay at sea longer and fish in previously inaccessible waters. The threat of a fresh ban on herring fisheries in 1995 was an incentive for

these pelagic trawlers to start fishing in the waters of West Africa in Mauritania and later also in Morocco.

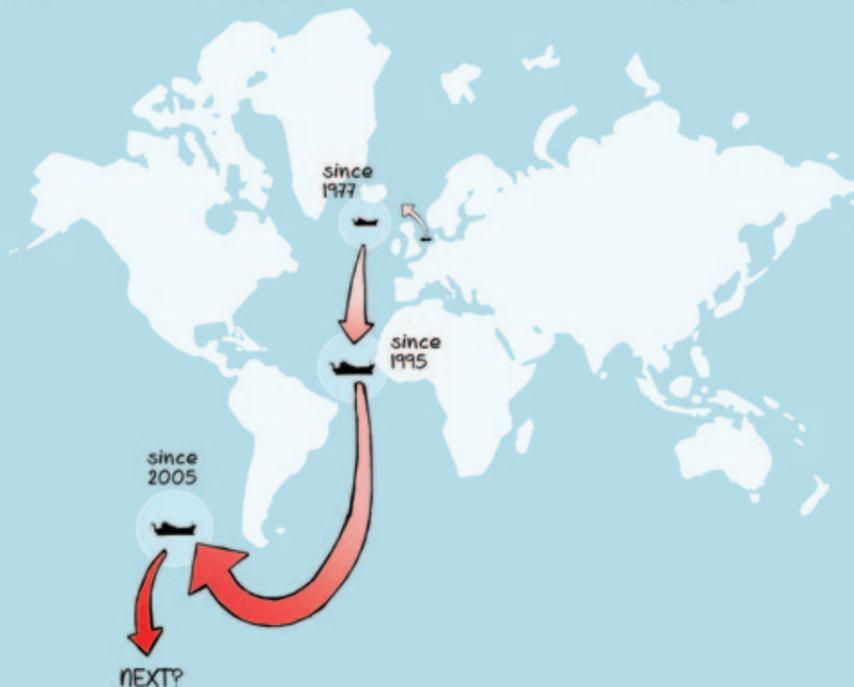
Over the last ten years several Dutch-flagged vessels of the PFA have been transferred to subsidiaries in other countries, allowing them to fish these countries' unused quotas and Hoover up their subsidies. The majority of the PFA fleet no longer carry a Dutch flag, operating instead under the flags of Germany, Lithuania, France, the UK and even Peru, among others. Today the fleet captures a significant share of its catch outside European waters, which it admits it has to do to remain financially viable.⁴³

As recently as 2005, the PFA further expanded its territory into the south-east Pacific, fishing off the coast of Chile. At the time, fisheries in this region were unregulated. By moving in at this early stage, the PFA established a presence and record of fishing before a management system was put in place. This enabled them to make a claim for Pacific fishery resources, eventually leading to yet more overfishing.⁴⁴

THE EXPANSION OF THE PFA FLEET



With sonar and satellite equipment ships find fish within 3 km radius. Because they work together the fleet can scan large areas in their hunt for fish.



TAKING FROM THE POOR

HOW THE PFA FLEET IN WEST AFRICA IS DAMAGING LOCAL ECONOMIES AND DECIMATING FISH STOCKS

While the PFA enjoys revenues resulting from catches outside Europe, little investment is returned to these regions. The PFA fleet in West Africa, for example, provides few jobs on board for local people and as the vessels process their catches at sea and do not use facilities on shore, the PFA fleet hardly brings any benefits to coastal communities.⁴⁵ And while EU fisheries agreements require that a portion of the money the EU pays to the host country for access should be invested in the development of sustainable local fisheries, this is not working effectively in many cases.⁴⁶⁻⁴⁷

Under international law, the European Union may only enter into agreements over fishing rights with another country if there is a so-called surplus of fish in local waters. The idea is that nations can only sell fishing rights in their own waters to another state if its own fishing sector catches less than the sustainable limit. In theory, this should prevent stocks from being overfished, but in reality European vessels are fishing in waters where stocks are fished at or beyond sustainable limits.

The PFA fleet, for one, is helping to decimate local fish stocks. When the PFA's trawlers first arrived in West Africa, in Mauritania in 1996, they were primarily fishing for sardinella. This stock has been declining since 1999 and is currently overfished. Later on, the fleet also went into Moroccan waters and turned towards other pelagic species, such as sardine and horse mackerel. Today almost all their target species in the region are fully exploited or over-exploited.⁴⁸

show that the volume of demersal fish captured as bycatch by industrial pelagic trawlers has often been larger than the entire volume of demersal fish that can legally be caught by vessels under the same fishing agreement.⁵¹ The closer the trawlers come to shore, the further the bycatch rate increases.⁵²

Because of declines in demersal fish stocks, local fishermen have also started to target pelagic species, putting pressure on overfished stocks and creating competition between the industrialised fleets and local fishermen.⁵³

To make matters worse, the species targeted by the pelagic trawlers in West Africa are a fundamental food source for larger species such as sharks, whales and dolphins. Overfishing means less food for animals higher up the food chain. Moreover, as the larger predators chase after the same schools of fish as the pelagic trawlers, they are often also caught in the nets. As a result, thousands of endangered turtles, rays and sharks have been killed by the EU pelagic fleet.⁵⁴

These shocking levels of bycatch of endangered species, as well as the measures that can be employed to prevent them, have been well known since 2006. But even though it is mandatory to prevent it under the UN Law of the Sea, neither the government of the Netherlands, where the PFA is based, nor any other EU country has done anything to stop the killing.

PFA trawlers discard around 10% of their target catch in West Africa.⁴⁹ The quantity of wasted fish of a trip of less than four weeks can be enormous, around 600 tonnes per trawler at full capacity. When overall catches are high, for example, pelagic species are discarded if they are caught in quantities too small to be processed economically or if the total catch is too large to be processed.⁵⁰ The trawlers also catch species they do not intend to target, such as tuna, hake and sea bream. Most of the unwanted catches are thrown overboard dead or dying.

Demersal species, which are the fish that live near the ocean floor, have also been adversely affected by the PFA's vessels, despite not being directly targeted. In fact, official evaluations of the EU agreement with Morocco



Unwanted bycatch of critically endangered leatherback sea turtle on board PFA trawler in Mauritania.

SO LONG, AND THANKS FOR ALL THE FISH

HOW YOUR TAXES ARE KEEPING THE PFA AFLOAT

‘Too much focus is put on short-term economic interests, which too often seem to prevail over environmental considerations... We have fished too much. We have thrown away fish we don’t want to land or for which we don’t have quotas. And we have used taxpayers’ money to build up bigger and bigger vessels. The result is that today 75 per cent of our stocks are overfished.’

EU Fisheries Commissioner Maria Damanaki⁵⁵

EU citizens are paying the price for their oversized fleets several times over. The EU fleet’s unsustainable and destructive fishing practices cost European citizens billions of euros each year in lost potential income and tax exemptions. In addition, despite widespread recognition that harmful fisheries subsidies should be brought under control, EU taxpayers have been paying around €1.9 billion in EU and national aid each year. This is fuelling overcapacity and overfishing.⁵⁶

The PFA companies and their factory trawlers have received a significant share of this aid. Without it, analysis suggests that their average combined annual profit of €54.7 million would evaporate, and could even result in a loss of €50.3 million.⁵⁷

DIRECT SUPPORT

European taxpayers paid the PFA at least €21.2 million for the construction and modernisation of their vessels between 1994-2006. Of this, €14.2 million was invested in four PFA vessels that have been fishing in West Africa in the last five years. One of these, the Helen Mary, received €6.4 million, the largest amount given to any EU vessel over that period.⁵⁸ It is almost certain that these investments have increased the effective fishing capacity of these vessels, enabling them to fish for longer periods, further afield and in more inclement weather.⁵⁹

The PFA additionally received a total of €24.5 million for a processing centre and improved fishing gear between 1994 and 2006, and another €1.1 million between 2007-2010 for gear

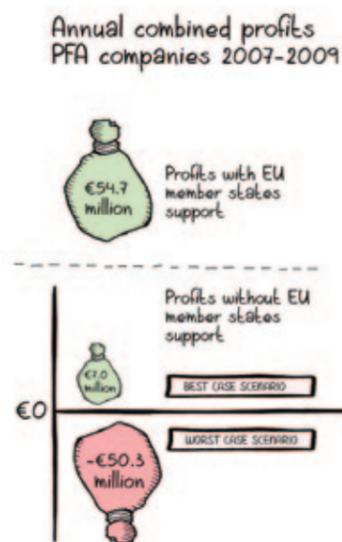
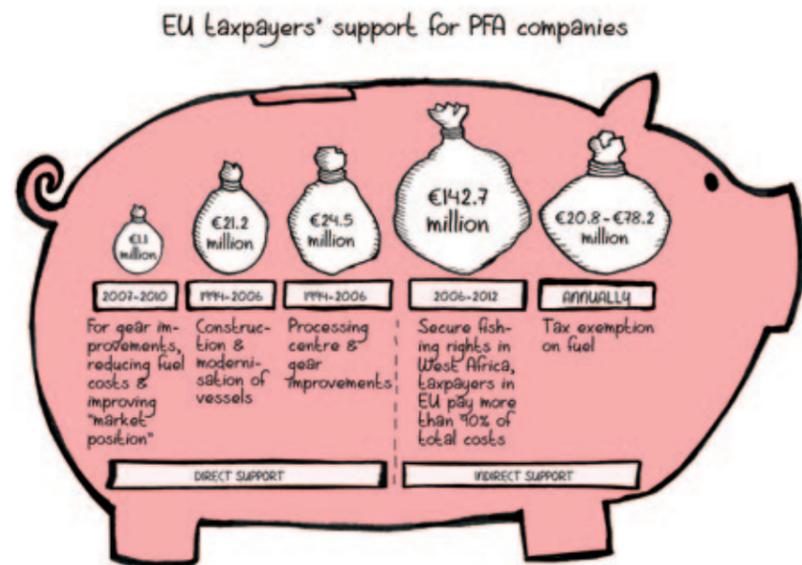
improvements, reducing fuel costs and improving their “market position”.⁶⁰

Both forms of direct support are provided on a co-financing basis, meaning the EU and the relevant member states both pay part of the amount. Some 85% of all national support to PFA companies was supplied by Germany.⁶¹

INDIRECT SUPPORT

The EU paid an estimated €142.7 million to secure fishing rights for PFA vessels in Mauritanian and Moroccan waters between 2006 and 2012. The PFA companies, like any other EU fishing company engaged in such fisheries, only had to pay a fraction of the total payments (between 4.6-11.1%). Yet, more than 90% of the fish they catch in the region is exported to countries outside the EU, such as China, Egypt, Nigeria and Thailand.^{62,63} This means taxpayers in the EU pay more than 90% of the access costs to allow these companies to continue overfishing in African waters to supply cheap fish to the rest of the world.⁶⁴

Perhaps the largest indirect subsidy the fishing sector enjoys comes in the form of a tax exemption on fuel. Although the EU has levied tax on most energy products and electricity since 2003, shipping and fishing activities are exempt. The resulting reduction in costs have boosted the short-term profitability of all European fishing companies, but has particularly benefited the type of industrial vessels used by the PFA companies. The value of fuel tax exemptions for the PFA fleet amounts to €78.2 million a year, according to one estimate.⁶⁵ The reduced cost encourages vessels to fish for longer periods, putting further pressure on stocks.⁶⁶



RESTORING OUR OCEANS

HOW CAN WE GET OURSELVES OUT OF THIS MESS?

‘Overall, the crisis that fisheries are now going through can be seen as an opportunity to renew both their structure – away from fuel-intensive large-scale fisheries – and their governance.’

Daniel Pauly, *Beyond Duplicity and Ignorance in Global Fisheries*⁶⁷

EU Fisheries Commissioner Maria Damanaki’s paradoxical assertion that ‘more fish would be caught if there was less fishing’ is absolutely right.⁶⁸ Fisheries ministers and the European Parliament need to drastically reform

the CFP in order to deliver stock recovery, prevent overfishing and reduce overcapacity to a level that facilitates sustainable fishing, in line with the European ambition to restore our oceans by 2020.

UNEP GREEN ECONOMY

‘The catching power of large-scale vessels implies that 160,000 of the world’s 4 million fishing vessels catch the same amount of fish as the remaining 3.84 million vessels...’

In order to achieve sustainable levels of fishing from an economic, ecological and social point of view, a serious reduction in current excessive capacity is required. Given the wide difference in the catching power, the job creation potential, and the livelihood implications of large-scale versus small-scale fishing vessels, it appears that a reduction effort focused on large-scale vessels could reduce overcapacity at lower socio-economic costs to society.’

United Nations Environment Programme, *Green Economy – Fisheries (2011)*⁶⁹

Greenpeace calls on EU governments and the European Parliament to agree new rules that:

- reduce overcapacity by decommissioning unsustainable fishing vessels, starting with the most destructive and oversized vessels, including the factory trawlers operating in the waters of poor countries;
- stop the flow of subsidies to destructive and unsustainable fishing practices, and instead only invest public money in measures of public value, such as restoring and maintaining stocks and a healthy marine environment, monitoring and control, data collection and scientific assessment;
- promote sustainable, low-impact and equitable fisheries, and ensure effective control and compliance – in the EU’s domestic and external fleets;
- set quotas in accordance with scientific advice on sustainable catches;
- deliver conservation objectives to achieve a healthy marine environment, with marine reserves for protected species; and
- establish full transparency in decision-making and funding of fisheries agreements.

GREENPEACE STANDS FOR POSITIVE CHANGE THROUGH ACTION. WE DEFEND THE NATURAL WORLD AND PROMOTE PEACE. WE INVESTIGATE, EXPOSE AND CONFRONT ENVIRONMENTAL ABUSE BY GOVERNMENTS AND CORPORATIONS AROUND THE WORLD.

WE CHAMPION ENVIRONMENTALLY AND SOCIALLY JUST SOLUTIONS, INCLUDING SCIENTIFIC AND TECHNOLOGICAL INNOVATION.

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