



The Black Sea Fishing Fleet: an Assessment

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Overview



- State of the fishing fleets
- Data quality
- Employment
- Economic significance
- Conclusions

Black Sea landings

- Total mean annual catch – around 400 kt (270– 530 kt), 1992-2010
- 81% of total catch for 2000-2010 – Turkish fishing fleet
- Turkish Eastern Black Sea region – 60% of total landings

Country \ Year	2006	2007	2008	2009	2010
Bulgaria	5 620	7 807	7 651	7 385	9 668
Georgia	9 659	18 147	26 462	25 000	25 000
Romania	614	518	444	331	231
Russian Federation	15 225	13 433	17 437	19 875	18 574
Turkey	313 877	468 707	350 740	309 136	332 505
Ukraine	30 537	24 869	27 741	35 967	41 151
Total	375 532	533 481	430 475	397 694	427 129

Fleet capacity

- 11 500 vessels
- By overall length
 - 85% – small vessels up to 12 m
 - 10% – 12-24 m
 - Less than 5% - over 24 m
- Gear type
 - Smaller vessels – multipurpose
 - Larger vessels – trawlers and purse seiners
- Bulgaria and Romania – about 40% of vessels active

Data quality

- Substantial data gaps due to different national criteria in collecting and publishing data
- Sources
 - Bulgaria and Romania: national fisheries agencies, STECF
 - Turkey: Turkstat
 - Ukraine: Ukrstat
 - Russia: Rosstat, Federal agency for fishery
 - Georgia: primary research under SESAME

Bulgaria

- 1009 vessels active in 2011
- 96% of all vessels under 12 m, responsible for 32% of catch
- Average age – 19 years
- Decrease in fleet capacity

Length class, m	Number of vessels	Tonnage, GT	Power, kW
under 6	773	554	5 987
6 - 12	1 464	3 164	39 730
12 - 18	62	1 200	8 403
18 - 24	25	1 104	4 119
24 - 40	12	1 351	3 069
Total	2 336	7 373	61 307

Romania

- Increase in number of vessels (16%), 2008-2012
- Decrease in GT (55%) and power (38%)
- Average age – 17 years

Length class, m	Number of vessels	Tonnage, GT	Power, kW
under 6	36	29	433
6 -12	169	172	1 295
24 - 40	1	136	331
Total	206	337	2 059

Georgia

- 324 small-scale boats in coastal fisheries, 2005
- Scarce official data
- Fishing of anchovy by Turkish and Ukrainian vessels in Georgian waters

Type of vessel	Number of vessels	Tonnage, GT	Power, kW
Motofeluga (purse seiner) LOA 10-15 m (av. 12 m)	11	144	990
Seiner, Georgian registration LOA 11-32 m (av. 25 m)	26	2 414	4 512
Seiner, Turkish registration LOA 27-57 m (av. 40 m)	19	2 179	4 282
Total	56	4 737	9 784

Ukraine

- Data on fleet includes Black Sea and Sea of Azov
- Decrease (13%) in number of fishing vessels 2006-2008
- Most vessels use polyvalent gear, capable of fishing with trawls, purse seines, nets or long-lines

Vessel type	Number of vessels
less than 80 GT and power less than 55 kW	1045
less than 24 m or less than 300 GT	106
24-45 m or 300-3000 GT	54
over 45 m or over 3000 GT	23
Total	1228

Russia

- Data available for the entire fishing fleet, incl. Northern, Far-Eastern, Western, Caspian and Azov&Black Sea basins
- 2023 fishing vessels and 800 other units in 2010
- Decline in fleet size
- 11% of total number of vessels or around 220 fishing vessels over 24 m in Black Sea and Sea of Azov
- About 300 vessels under 20 m in Azov&Black

Turkey

- Largest fleet in the Black Sea, yet declining in size

Length class, m	Number of vessels	Vessel tonnage, GT	Number of vessels	Vessel power, kW	Number of vessels
5 – 11.9	4 198	1 - 4	3 339	1 - 9.9	1 439
12 – 19.9	383	5 - 9	748	10 - 19.9	736
20 – 29.9	269	10 - 29	380	20 - 49.9	914
over 30	143	30 - 49	148	50 - 99.9	869
Total	4 993	50 - 99	171	100 - 199.9	454
		100 - 199	121	200 - 499.9	325
		200 - 499	75	over 500	256
		over 500	11		

Employment



- 25-30 thousand jobs in 2007-2011
 - Bulgaria: 3900 jobs / 2800 FTE
 - Romania: 444 jobs / 403 FTE
 - Georgia: ~750 jobs, larger vessels
 - Ukraine: ~2300 jobs / 2000 FTE
 - Russia: average 2400 jobs
 - Turkey: 15740 full time, 746 part time, 15% decline during the period

Production value



- Bulgaria - €2.15 m
- Romania - €0.49 m
- Turkey - €400-600 m

- Linkages to processing industry

Conclusions



- Fishing sector directly linked to state of marine living resources
- Trends
 - Decline in fishing fleet size
 - Decrease in employment
- Need for consistent data collection
- Is fishing effort and pressure on fish stocks following the development in capacity?
- Consequences for fish stocks?

Contacts

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