



QUESTIONNAIRE ON  
**THE IMPACT OF COVID-19**  
ON FISHERIES AND AQUACULTURE

RESEARCH PROJECT

**1. What are the main effects and challenges of the pandemic on workers in the fisheries and aquaculture industry?**

Please consider the impact on the following elements:

	High	Medium	Low	No impact	Don't know
a) Fewer working days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Lower salaries	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Job instability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Difficult working conditions due to COVID restrictions and procedures	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Productivity decrease	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please describe)					

**Could you please elaborate? (optional)**

The fisheries sector was particularly affected by the crisis. The unprecedented crisis and health measures for containment have affected demand, market prices, free movement of workers and goods, port operations and disrupted the entire chain of production.

Regarding the direct effects on workers and staff, the fisheries sector has suffered from difficult working conditions due to COVID restrictions and procedures and productivity decrease.

- Issues regarding crew changes (in connection with closed borders, travel restrictions, and quarantines)
- Lack of available protective personal equipment (masks, gloves...) at the beginning of the crisis
- In certain cases, staff shortages because of self-isolation/sickness
- Shortage of physicians for cases of repatriation of sick or injured and regular medical care in foreign ports.

Indirect effects on workers are mainly link to the collapse of prices and demand that fragilized fishing companies and the entire sector. They include:

- Fewer working day (with employers having to use temporary unemployment)
- Lower salaries (because of temporary unemployment, less revenue from fish sales linked to price collapse...)
- Threat on job viability (because of the economic threat to companies)

**2. Based on your knowledge, what species / products / fleet segments have been significantly impacted?**

Please indicate the impact on the following elements:

**Species (please specify what species):**

- All species to different extent.
- In particular and above all
  - o Species (and fish sizes) destined to the HORECA market (restaurant fish)
  - o High value species: nephrops, sole, cod, shrimp, shellfish, lobster, hake, monkfish, and megrim.

**Products (please specify what products):**

- Mainly fresh products

**Fleet segments (please specify what fleet segments):**

- All fleet segments.
- In particular demersal fleets across the EU.
- EU fleet fishing in non-EU waters.

**3. What are the key impacts of the pandemic on consumption patterns?**

Please consider the impact on the following consumption patterns:

	Increase	Stable	Decrease	Don't know	Why? (optional)
a. fresh products' consumption	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
b. frozen products' consumption	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
c. processed products' consumption	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
d. online purchases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
e. other (please describe)					

**Could you please elaborate? (optional)**

A radical decrease in fresh product consumption was observed. In a “panic shopping” mode like the one observed before national lockdowns, frozen and canned products are preferred by consumers over fresh ones. During the first wave of the pandemic, important supply issues appeared for fresh products and impacted consumption too.

In general, the fisheries sector has suffered from the disappearance of large sections of key demands:

- This was the case as the HORECA sector was closed, affecting a number of key, high-value species that do not always have another market
- The closure of schools, factories, and administrations during the lockdown periods also meant that their canteens were closed. Therefore, sales to caterers collapsed.
- The closure of outdoor local markets and the drastic reduction of tourism also constituted an issue for several fishing fleets
- Loss of demand also appeared for fisheries selling in third-countries, sometimes linked to important loss of consumer purchasing power (African market for instance)

**4. Do you expect these impacts to affect consumers' behaviour in the long run and how?**

Please consider the impact on the following:

Yes	No	Don't know	Why? (optional)

<b>a. fresh products' consumption</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>b. frozen products' consumption</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>c. processed products' consumption</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>d. online purchases</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Could you please elaborate? (optional)**

Depending on the definition of the “long run”. It has been about a year since the pandemic started in Europe and the effects on fresh fish demand and even more so on fresh fish prices are still apparent. There is a need to reboot the sector to see pre-pandemic prices come back. The threat of economic recession following the pandemic means that the sector fears to see great difficulty to see a price recovery.

**5. Did the pandemic impact on the availability of wild caught products more than of farmed products?**

Yes  No  Don't know

**Please explain why and the consequences on consumption**

As explained in question 1, the pandemic affected work in the fisheries sector both directly and indirectly. The collapse of demand, explained in question 3 led to many boats being tied up in ports.

Fishing activities have been more affected because of the nature of the activity that:

- Depends on the flow of workers across regions, countries (crew changes);
- Is not as predictable as fish farming;
- Relies on the export of products to market of high demand (PT, SP, FR, IT) or international ones (Africa, China,...);
- Proposes high-end products that are consumed during gatherings, in restaurants and for special occasions. Therefore, in times of pandemic their demand collapses.

**6. Did the pandemic impact on the availability of fresh products more than processed products?**

Yes  No  Don't know

**Please explain why and the consequences on consumption**

As explained in question 3, “panic shopping” attitude experienced before the national lockdowns frozen and canned, including processed products are preferred by consumers over fresh ones.

Fresh products have many particularities that means that they were more affected than processed ones:

- The freshness level cannot be maintained. These highly perishable products have to be sold quickly and therefore are hugely dependant on the market conditions.

- Storage of fresh products can only be for a limited period of time.
- Fresh products are usually more high-end products that are consumed during gatherings, in restaurants and for special occasions. Therefore, in times of pandemic their demand collapses.

**7. Is the consumption of fishery and aquaculture more impacted than the consumption of other food (e.g. meat)?**

Yes  No  Don't know

*Please explain why and the consequences on consumption*

Yes, for the reasons explained in the 2 previous questions, and linked to the fact that:

- Fish products are highly perishable products have to be sold quickly and therefore are hugely dependant on the market conditions.
- Fish products are usually more high-end products that are consumed during gatherings, in restaurants and for special occasions. Therefore, in times of pandemic their demand collapses.
- Productions depends on the flow of workers across regions, countries (crew changes);
- Production is not as predictable as fish farming;

**8. What are the most effective measures put in place so far to support the sector at EU and/or national level and why?**

**Financial measures (please describe initiative(s), aims and results):**

- New rules allowing for increased financial support of storage (storage aid rate increased) and for increased used of storage mechanism were instrumental to help overcome the production storage challenges (linked to the collapse of demand and prices, leading to increase storage needs).

**Other not financial measures impacting production, distribution and/or consumption (please describe initiative(s), aims and results):**

- The recognition of fishers as 'priority workers' allowing them to cross borders was needed to allow many fleets to continue fishing.
- Ensuring that truck drivers were also allowed to cross borders in timely manners was important for product delivery of highly perishable fresh fish.

**Promotional campaigns (please describe initiative(s), aims and results):**

- The fishing sector has been calling for a promotional campaign to help reboot the sector and to allow prices to recover. An initiative has been launched by the Commission: "Taste of the Ocean". It is too soon to evaluate its potential effects. However, it can already be said that such promotion campaigns are needed in all Member States and should reach a wider public (not only using social medias but also TV, and others).

**Please use this box for reporting any measures put in place which failed to support the fisheries and aquaculture sector and explain why:**

**9. Do you think the fishery and aquaculture sector adapted to initial shock?**

	Recovered/ improved	Stable	Worsening	Don't know
a) Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Production costs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Transaction costs (transport, distribution, COVID measures)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Commercial margins	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**10. Can you provide an example of one or more solutions employed within the fisheries and aquaculture sector during the pandemic? Please quantify their impacts.**

	High impact	Medium impact	Low impact
a) Technological solutions put in place by producers (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Stocking strategies adopted by processing companies (please specify)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Diversification of production (please specify)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
d) Online sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
e) Home deliveries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Other (please describe):</b> <ul style="list-style-type: none"> <li>- Many fishing companies used storage strategies to reduce their dependance on a collapsed market during the first wave.</li> <li>- Some fishing vessels adapted their fishing strategy to the conditions of the market</li> <li>- Other selling strategies (online, home delivery) have been explored at local level</li> </ul>			

**11. In your opinion, what type of initiative could strengthen seafood security in the EU?**

**Financial measures (please specify expected impact and conditionalities):**

- Regarding food security, it is clear that it is put at risk in times of crisis. If fishermen's livelihoods are at stake this directly affects the food supply and security of the EU and global consumers. Therefore, timely and effective financial support has to be deployed in response to crisis. Conditions and application for support have to be made simple to ensure confidence and continuity of food production.

**Promotional campaigns (please specify expected impact):**

- The EU should play a more prominent role in informing EU consumers of seafood as the safe and smart choice to make for people and the planet and ensuring consumers' trust in the high standards of EU produced fisheries products.

**Other not financial measures impacting production, distribution and/or consumption (please specify expected impact and conditionalities):**

- The special status of fishers and the essential nature of the sector, as a key player for the EU food security, has to be recognised and allow for special treatment to ensure the continuity of production.