COMMUNITY SUPPORT FRAMEWORK 1991-93

Processing and marketing of fishery and aquaculture products (Objective 5a)

GREECE



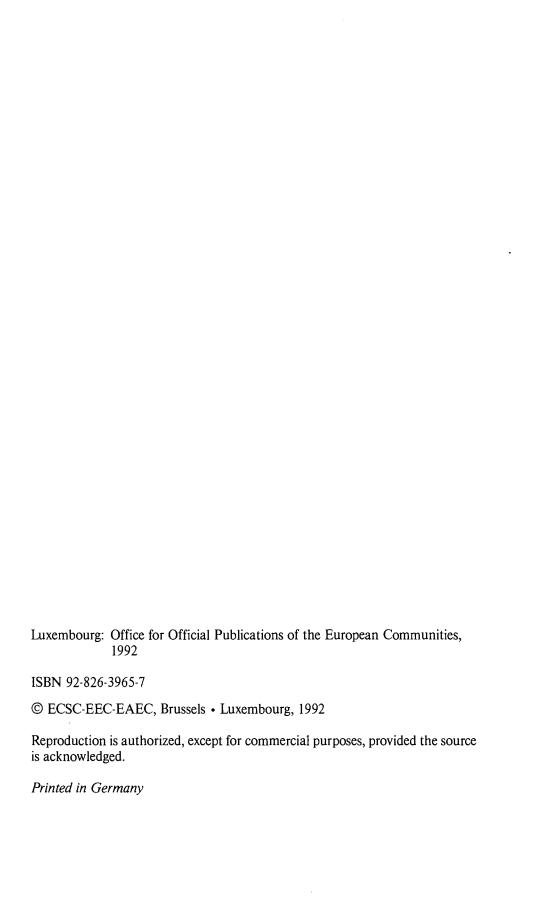




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Cataloguing data can be found at the end of this publication.

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Preliminary note

Under Article 8 of Council Regulation (EEC) No 2052/88 of 24 June 1988 (Official Journal L 185, 15.7.1988, p. 9), all regions of Greece are covered by Objective 1 of the reform of the structural Funds.

This document is an addendum to the Community support framework approved by the Commission on 30 March 1990.



Introduction by Mr Marin

Vice-President of the Commission and Member responsible for fisheries

The Community support frameworks (CSFs) provide the context within which the Member States can apply to the Commission for finance.

The CSFs in the processing and marketing sectors for fish and aquaculture products are linked to the achievement of Objective 5a of the reform of the structural Funds.

This part of the fishing industry is among those economic activities to benefit from the Single European Act. The underlying principles governing the reform of the Funds — concentration, partnership, mutually consistent policies, programming, additionality — also apply to these sectors.

The priority schemes for regions whose development is lagging behind come under the CSFs for Objective 1 of the reform. All assistance to the territory of the former German Democratic Republic is covered by a CSF especially for the new *Länder*, to be published separately.

The 11 Community support frameworks (Luxembourg has not submitted a sectoral plan) represent a nominal financial commitment on the Community's part of some ECU 180 million in the years 1991 to 1993, which is one and a half times the amount of aid granted during the years before the reform.

The processing and marketing of fish and aquaculture products represent important sectors in the economic activity of certain regions and developing them contributes to economic and social cohesion.

The regions concerned are having to meet the challenges of an increasingly fierce competitive climate and major problems involving restructuring and adjustments in the fields of technology and hygiene.

The Community's assistance is therefore geared toward:

(i) improving the competitiveness of the sector within the context of completing the internal market and of increased competition from non-member countries;

- (ii) guaranteeing a constant flow of inputs of raw materials;
- (iii) contributing to the application of Community hygiene and public health standards and greater attention to the quality of the environment.

The Member States, in concert with the Commission, are required to implement the various forms of assistance on the basis of the Community support frameworks, particularly through operational programmes.

The first priority for Community assistance is building, modernizing and rationalizing auctions and markets and facilities for preparing and processing fish, developing new products, improving quality and hygiene in production and marketing processes and increasing the value-added of products.

Since individual investment schemes are allowed for in the overall programming, economic agents in the fishing sector will also be able to profit from certain advantages in connection with the processing and marketing of fish and aquaculture products:

- (i) more precise knowledge of the objectives pursued by the Community;
- (ii) greater transparency of Community support;
- (iii) less risk of dissipation of funds;
- (iv) better monitoring and evaluation of the actual impact of the assistance.

It is to be hoped that all the structural measures relating to the fishing and aquaculture sector — including those concerning fishing fleets — will be incorporated in the Community's structural instruments in the near future.

Manuel Marin

Objectives of the structural Funds

Community action through the structural Funds, the EIB and other existing financial instruments shall support the achievement of the general objectives set out in Articles 130a and 130c of the Treaty by contributing to the attainment of the following five priority objectives:

- 1. promoting the development and structural adjustment of the regions whose development is lagging behind (Objective 1);
- 2. converting the regions, frontier regions or parts of regions (including employment areas and urban communities) seriously affected by industrial decline (Objective 2);
- 3. combating long-term unemployment (Objective 3);
- 4. facilitating the occupational integration of young people (Objective 4);
- 5. with a view to reform of the common agricultural policy:
 - (a) speeding up the adjustment of agricultural structures (Objective 5a),
 - (b) promoting the development of rural areas (Objective 5b).



1. General economic background

1.1. General

Greece is located on the periphery of the European Community and is almost entirely surrounded by the sea.

As a consequence and despite the economic indicators, fisheries, which represents 0.28% of the gross domestic product, plays an important role in social activities.

The demand for fish products is growing while the dependence on imports is slightly decreasing due to higher domestic production.

The yearly consumption of fish products averages 19.5 kg per capita.

1.2. Fishing fleet

In 1989 the fishing fleet consisted of 21 765 vessels, 20 828 of which were inshore fishing vessels, 853 offshore fishing vessels and 84 ocean-going vessels.

In line with Council Regulation (EEC) No 4028/86, the Greek multiannual guidance programme (MGP) for the evolution of the fishing fleet has established objectives in terms of engine power and vessel tonnage for the reduction of the capacity of the fishing fleet. As of October 1990, it is estimated that the programme targets are unlikely to be met.

Small-scale fisheries and coastal fishing are carried out in Greek national waters and in international waters in the Mediterranean.

Fishing trips do not exceed three to five days for small-scale fisheries vessels and in the case of bottom-fishing vessels operating close to the landing places they do not exceed two days. The length of the fishing trips is unfavourably influenced by the lack of refrigeration equipment on board resulting in an increase in production costs. Long-distance fishing is carried out in the waters of West African countries such as Senegal, Guinea, Nigeria and Sierra Leone.

Data concerning fishing capacity in national waters are included in the figures for the overall fishing capacity and are not available separately. The number of vessels involved in this type of activity is not available either.

The facilities for the marketing of fish consist of the landing ports themselves and the auction halls located in the landing ports where only 30% of the total fish landed is sold. This situation not only creates operational problems but also affects the reliability of production data which have been established in collaboration with the Greek Agricultural Bank and the customs offices.

1.3. Aquaculture

The sector has largely developed recently as a result of low production costs and favourable environmental conditions (water temperature and characteristics).

These factors are attracting many operators from the private sector to Greece. However, there are also local initiatives.

The situation of the sector and its characteristics indicate a steadily favourable trend. The production methods and plant types in the Greek aquaculture sector can be subdivided into:

- (a) Fresh water: intensive production (trout, carp and eel) with a yearly production of 2 410 tonnes (1989) from 140 units;
- (b) Salt water: intensive production (sea bream and sea bass) with a yearly production of 500 tonnes (1989) from 30 units;
- (c) Brackish water: semi-intensive and extensive production (eel, mullet, sea bream and sea bass) with a yearly production of 2 200 tonnes (1989) from 70 units;
- (d) Mussel farming and other shellfish and molluscs: production capacity of 1 500 tonnes (1989) from 50 units.

Complementary measures have been adopted in the field of environmental protection concerning the location of aquaculture installations.

1.4. Processing

The number of processing firms is estimated at 51, plus another 48 very small units which process frozen products. The artisanal characteristic of these firms has to be stressed and their business figures (output, number of

employees, and turnover) highlight the lack of any real industrialization.

The total employment figure for the subsector is about 2 500 (of which 1 700 are seasonal) and, with few exceptions, the number of workers per firm lies between two and eight.

The total production capacity of the processing firms was approximately 12 500 tonnes in 1988 with 11 firms accounting for 8 200 tonnes.

A difficult market situation where production and domestic demand are not matched is causing many difficulties in selling the production. Consequently, the unsold part of the production amounted to 1 418 tonnes in 1988.

Two important activities in the processing subsector are:

- (a) the salting of anchovies which are exported as semiprocessed products to foreign canning firms, and
- (b) the smoking of fish.

Moreover there are good prospects, even at this early stage, for the development of the deep-freezing industry.

1.5. Marketing

1.5.1. Landing ports

Landing ports, where first point of sale takes place, are at an early stage of development. Most of these landing ports lack any sort of adequate equipment and facilities for the unloading of catches or for supplies. They usually consist of a jetty necessary for the berthing of vessels.

1.5.2. Auction halls

There are in total nine auction halls plus one which is about to start in Preveza and another which will be constructed in Nea Michaniona. The latter is partly financed through a grant under Council Regulation (EEC) No 355/77.

The equipment in the auction halls dates back to the years 1963-65. Since then, only the minimum of maintenance work has been carried out resulting in a deterioration of the facilities. During the last five years these facilities were not included as modernization projects for Community aid.

Installations are poor but a restructuring plan is being implemented. However, efforts up to now have not resulted in providing appropriate equipment and services.

Most of the catches (about 75%) are not auctioned. They are delivered through a series of intermediaries to the processing firms (which take up 13% of the catches) and to retailers. In this situation, initial sales are strictly linked to a commission system and producers are encouraged to form producers' associations.

The marketing of shellfish and molluscs (mussels, oysters, etc.), which have good prospects mainly for the export trade, is adversely influenced by the lack of hygiene and quality control equipment and facilities.

2. Priority axes for common action

2.1. Priority axes

Based upon the strengths and weaknesses of the sector, the Commission and the Greek authorities have agreed within the framework of partnership the following priority axes for granting Community aid.

The two axes are:

Axis 1: Processing; Axis 2: Marketing.

2.1.1. Axis 1: Processing

Measure 1

To encourage the technical innovation in processing and to improve quality and hygiene conditions by building new facilities for the processing and storing of fishery and aquaculture products, and particularly of frozen products, new and/or non-exploited species.

Measure 2: Pilot/demonstration projects, technical assistance, and studies

Where investments involve pilot/demonstration projects, technical assistance and studies will be carried out to support the processing axis.

2.1.2. Axis 2: Marketing

Measure 1

To contribute to the improvement of quality, hygiene conditions and the regular supply of fish products by means of facilities for catch handling, general supplies (including ice supply), and cold storage.

Measure 2

To strengthen the marketing network, and to improve the hygiene in marketing, by building new auction halls and restructuring existing ones.

Measure 3

To improve the quality and hygiene conditions in the

marketing of shellfish from aquaculture by building new purifying plants.

Measure 4

To improve the value of eel production by building centres for their selection and calibration.

Measure 5: Pilot/demonstration projects, technical assistance, and studies

Where investments involve pilot/demonstration projects, technical assistance and studies will be carried out to support the marketing axis.

2.2. Coordination with other Community aid

2.2.1. Common fisheries policy (CFP)

The actions foreseen in this Community support framework must conform with the objectives of the common fisheries policy. The implementation of this policy consists of measures with a view to speeding up the adjustment of fisheries and aquaculture structures which include:

- (a) Regulation (EEC) No 4028/86 on Community measures to improve and adapt structures in the fisheries and aquaculture sector;
- (b) Regulation (EEC) No 3252/87 concerning the coordination and promotion of research in the fisheries and aquaculture sector.

The coherence between the actions foreseen in this Community support framework and the above measures will be ensured during their examination and implementation.

In the implementation of Regulation (EEC) No 2321/88, setting out application procedures for Community aid under Regulation (EEC) No 4028/86 concerning fishing port facilities, Greece has presented a specific programme which was adopted by a Commission Decision on 29 June 1990 (Decision 90/370/EEC, Official Journal L 180, 13.7.1990).

2.2.2. Other objectives of the reform of the structural Funds

As part of the reform of the structural Funds other Community support frameworks under Objectives 1, 2, 3 and 4 have been adopted.

The Community support framework Objective 1 for Greece (period 1989-93) stipulates that, under Objective 5a, not more than ECU 17 million will be allocated to the processing and marketing of fishery and aquaculture products. In 1989-90, Greek projects have been granted under the 'fisheries' side of Regulation (EEC) No 355/77 as follows:

June 1989: ECU 0.38 million for one project
December 1989: ECU 4.70 million for three projects
June 1990: ECU 0.86 million for one project
December 1990: ECU 1.84 million for two projects
Total: ± ECU 7.8 million for the period 1989-90.

The funds allocated for the period 1991-93 should therefore not exceed ECU 9.2 million.

In order to ensure economic and social cohesion, priority will be given, where appropriate, to actions within this Community support framework which complement and integrate with other Community support frameworks.

2.3. Integrated Mediterranean programmes (IMPs)

Within the framework of the IMP for Crete, an investment project has been selected for a grant, namely the construction of a new auction centre in Xania. The eligible investment cost is approximately ECU 0.8 million and the EC grant amounts to 50% of this figure. Such a measure, to be granted during the period 1991-93, is regarded as a 'measure already decided' (see Table 1, p. 18) within the budget allocated to this CSF under Regulation (EEC) No 4042/89.

3. Forms of intervention

3.1. Forms of assistance

According to Regulation (EEC) No 4042/89 the Community intervention will take one or several of the following forms:

- (a) operational programmes,
- (b) global grants,
- (c) suitable projects,
- (d) pilot/demonstration projects, technical assistance and studies.

Operational programmes will be the main form of assistance.

3.2. Rates of finance

Greece being totally covered by Objective 1 of the reform of the structural Funds, the grant rate for financing all forms of assistance will be up to 50% of the total eligible costs.



4. Indicative financing plan

The amounts shown in the Community support framework financing tables are those agreed between the Commission and the Greek Government. The figures relate to the period 1991-93. The tables contain commitments made under the European Agricultural Guidance and Guarantee Fund (EAGGF), Guidance Section, part of the structural Funds, and are in line with Objective 5a of the reform of the structural Funds and also with Regulation (EEC) No 4042/89 for the improvement of conditions under which fishery and aquaculture products are processed and marketed.

The indicative financing plan expressed in ecus at 1991 prices is presented in the form of two tables:

Table 1 shows funding by priority axis; Table 2 shows funding by year.

European Investment Bank

Concerning the possible participation of the EIB, the loan packages are not estimated at this stage, the actual amounts of loans being dependent on the projects to be submitted by the promoters with the consent of the national authorities concerned and the approval of the EIB organs.

Whenever appropriate, the EIB is prepared to approve, on the basis of its customary criteria, applications for loans for eligible investments not provided for in the Community support framework.

Table 1 Indicative financing plan by priority axis and existing commitments (1991-93)

At 1991 prices

(1 000 ECU)

	Total cost ¹	Public expenditure										
Priority		Total public expenditure	Community grants				National contribution ²				Private sector	Community loans
axes			Total EEC	EAGGF 5a	ERDF	ESF	Total national	Central government	Local authority	Other		EIB ³
	1	2=3 + 7	3=4 to 6	4	5	6	7=8 to 10	8	9	10	11	12
New actions												
 Processing Marketing 	14 400 3 200	10 080 2 400	7 200 1 600	7 200 1 600		<u>-</u> -	2 880 800	2 880 800	<u> </u>		4 320 800	
New actions Subtotal	17 600	12 480	8 800	8 800		_	3 680	3 680	-,	_	5 120	token entry
Existing commitments IMPs	800	600	400	400	_	_	200	200	_	_	200	
Existing commitments Subtotal	800	600	400	400	_	_	200	200	_	_	200	token entry
Total	18 400	13 080	9 200	9 200		_	3 880	3 880	_		5 320	token entry

Only including investments which are planned for co-financing under this Community support framework.

Breakdown between State/region/other will be decided later.

³ Participation of the EIB will be decided later.

Table 2 Indicative financing plan by year (1991-93)

At 1991 prices

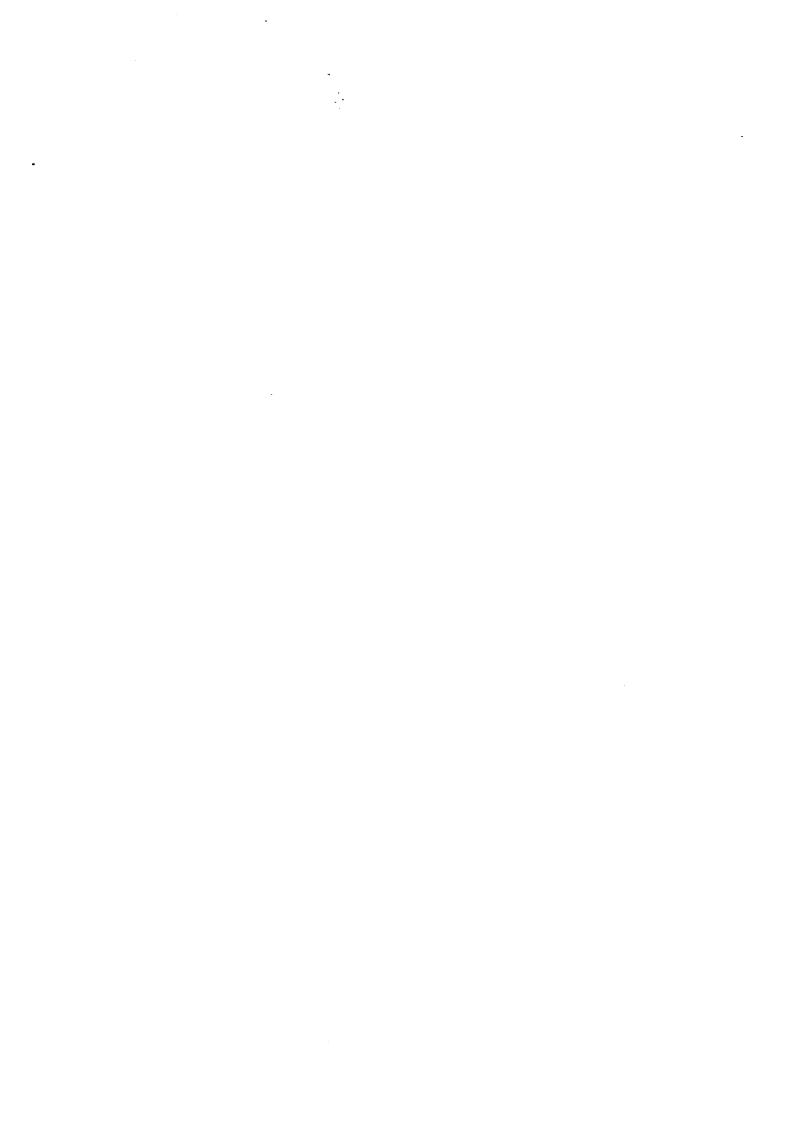
(1 000 ECU) .

	Total cost ¹	Public expenditure										
		Total	Community grants				National contribution ²				Private sector	Community loans
	0000	public expenditure	Total EEC	EAGGF 5a	ERDF	ESF	Total national	Central government	Local authority	Other		EIB ³
	1	2=3 + 7	3=4 to 6	4	5	6	7=8 to 10	8	9	10	11	12
1991 1992 1993	6 000 6 400 6 000	4 265 4 550 4 265	3 000 3 200 3 000	3 000 3 200 3 000			1 265 1 350 1 265	1 265 1 350 1 265		_ _ _ _	1 735 1 850 1 735	_
Total 1991-93	18 400	13 080	9 200	9 200	_	<u> </u>	3 880	3 880	_	_	5 320	token entry

Only including investments which are planned for co-financing under this Community support framework.
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