

Initial Focus Group on Trade Minutes

Wednesday, 17 February 2021

15:00 - 16:00 CET

Zoom online meeting

Welcome from the Secretariat

Adoption of agenda: adopted

Membership of the Focus Group

- **Introduction roundtable**

The members of the Focus Group introduced themselves and their associations.

Chair of the Focus Group

- **Election by the members**

Poul Melgaard Jensen (Danish Seafood Association) was elected Chair by the members.

Terms of Reference

- **Overview of purpose, proposed outcomes, timeline, resources**
- **Exchange of views on expectations for future discussions and draft advice**
- **Way forward: Data collection**

The Secretary General provided an overview of the [Terms of Reference](#) and encouraged members to provide their views on the way forward. The Secretary General highlighted that the expected outcome is a “catalogue of the relevant trade policy instruments with their importance on the EU market supply of fishery and aquaculture products”.

Mike Turenhout (Visfederatie) suggested that the Focus Group should start by looking at how much seafood is imported and its sources (wild catch, aquaculture). Then, it would be possible to assess how imports are divided across different trade policy instruments.



Linnéa Engström suggested that the Focus Group's report could also include data on imported sustainably certified seafood, in order to determine how it affects the EU market. MSC has a significant amount of data compiled on this matter and is available to share it.

Vanya Vulperhorst (Oceana) wondered about which trade policy instruments would be most relevant to include the Focus Group's report.

Mike Turenhout (Visfederatie) suggested to cover SFPAs, other bilateral fisheries agreements with countries outside the EU, and FTAs.

The Chair suggested to cover the post-Brexit EU-UK bilateral agreement.

Guillaume Carruel (EAPO) suggested to cover the EEA Agreement.

Katarina Sipic (AIPCE-CEP) suggested the development of a map to help select the relevant trade policy instruments. This could be done by a specific member or through suggestions from all the members ahead of the next meeting. The member recalled that there are "erga omnes" instruments, which do not refer to specific countries, such as the ATQs Regulation, while then there are also bilateral instruments, such as FTAs and fisheries agreements. The EU's seafood balance should also be taken into account. With this information, it will be easier to determine if the FG should cover everything or only some case studies.

Vanya Vulperhorst (Oceana) highlighted that it could be useful to connect it with other Commission's consultations, for example SFPAs, GSP+, and Trade Policy Review.

Katrin Poulsen (WWF) agreed that the scope should not be overstretched. It could also be relevant to discuss intra-EU trade flows.

Guillaume Carruel (EAPO) wondered if, in a potential future draft advice to the Commission, it could be worth communicating that understanding all trade policy instruments is a daunting task, so there could be a recommendation for the Commission to undertake a study.

The Secretary General suggested that the FG could ask Commission for some assistance, in order to benefit from their experience with EUMOFA and EUROSTAT. If the FG concludes that the proposed outcomes are not viable, then a recommendation to the Commission to undertake a study would be quite relevant.

Katarina Sipic (AIPCE-CEP) stated that it would be positive to involve the Commission, particularly to access trade statistics. The member wondered how the intra-EU trade flows could be covered, since statistics on that matter can be rather difficult. It is important to know the seafood balance in the EU.



Katrin Poulsen (WWF) agreed with the proposed approach. The FG should avoid increasing the scope too much. On intra-EU trade flows, it could be relevant to highlight, in a potential future advice, the problem of lack of data availability and monitoring.

Vanya Vulperhorst (Oceana) asked if any doubts had been raised concerning the official figure from EUMOFA on the total of seafood imports in the EU market.

The Secretary General responded no issues on the total figure had been raised, but that Working Group 2 wanted to know how it was divided across the different trade policy instruments. For example, there were discussions about the impact of the imports under the ATQs Regulation.

Mike Turenhout (Visfederatie) recalled that he had previously provided a [presentation](#) on the EU's seafood balance at a MAC meeting, which provided an overview of the origin of seafood consumed in the EU. If a species is selected, then it is possible to determine the relevant trade instruments. Then, it would be possible to discuss the reason for the trade instrument, for example if it is for greater value added or for other purposes. Not all trade agreements are as important for seafood.

Linnéa Engström (MSC) emphasised that some species would definitely be more relevant than others from a trade perspective. The member wondered if it was possible to scope out specific species or if it was necessary to cover all of them.

The Secretary General recalled that, under the Terms of Reference, the FG was expected to cover the import volume of the relevant commercial species/products. Therefore, at least, the most important species should be covered.

The Chair stated that, as a starting point, the FG should look at how the EU seafood market looks like, how it is structured, its size, and the available statistical sources. It is important to consider what the EU's production looks like (wild caught and aquaculture) and the imports. There are EUMOFA statistics and AIPCE-CEP produces the [FinFish study](#). It is necessary to ensure catches by EU vessels in third countries under fisheries agreements are duly taken into account in official statistics. It is also necessary to look at the main species, determine how much is aquaculture and how much is wild caught, the difference between process and unprocessed products. The most important species should be covered. The aim is to know how the EU seafood market is affected by trade agreements and arrangements with third countries. There should be a relevancy criteria to group them, including for bilateral agreement and for non-preferential agreements. In preferential agreements, seafood species are not specified, while non-preferential agreements, such as the ATQs, determine specific species. There should be some mapping of trade agreements and trade arrangements. For the most important trade instruments, the FG should look into the conditions for market access, the volume of the most relevant species, and country of origin. The FG should also identify potential statistical and methodological anomalies. The MAC should be able to determine if trade instruments are effective



and fulfil their purpose. For bilateral fisheries agreements with non-EU countries, it is important to determine how the catches are statistically considered.

Linnéa Engström (MSC) responded that the aim seemed extremely ambitious and quite difficult to achieve. There are statistics available, but it would likely better to limit the scope. The member argued for the inclusion of certificated catches, adding that MSC receives data from many retailers. It could be relevant to cross-check this data with official EU figures.

Mike Turenhout (Visfederatie) agreed that it was a very large task, but added that, for the beginning, it was positive to have a starting point for an overview. Once there is an overview, the FG can decide where to dedicate more time.

Linnéa Engström (MSC) wondered about some overlapping between trade instruments. For example, a country could be under a SFPA agreement and also have GSP+ status. The member expressed interest in Global South fisheries and tuna.

Mike Turenhout (Visfederatie) offered to prepare some balance sheets on trade flows.

Guillaume Carruel (EAPO) mentioned that there were no explicit references to SFPAs and bilateral fisheries agreements in the Terms of Reference, plus if these would be officially considered trade policy instruments.

The Secretary General suggested, as an action item, that the Secretariat could circulate an email for members to identify the most relevant trade policy instruments for consideration. The balance sheets prepared by Mike Turenhout could help in this choice. Members could perhaps also identify the most relevant species. The Secretary General asked Mike Turenhout to provide more information on the work process and data collection for the AIPCE-CEP's Finfish study.

Mike Turenhout (Visfederatie) explained that the Finfish study is mostly based on EUROSTAT data. Third country imports are converted to whole fish equivalents, in order to know the live weight of the imported products. Other statistics on fisheries and aquaculture are also included. The aim of the study is to show the consumption volume in the EU as well as the supply sources. The study was initially on white fish species, but now it also includes other commercially important species. It provides insight into seafood consumption trends. The study was created to check the EU's official figures and also to demonstrate that the processing sector makes use of the domestic supply, but that it needs external supply to fulfil the EU's seafood demand.

The Chair agreed that the scope would need to be limited, but added that it is important to have basic knowledge beforehand.



The Secretary General asked if the Secretariat should request assistance from the Commission for the next meeting concerning the availability of data. Or if it would be better to wait, in order for the FG to discuss more beforehand.

Katarina Sipic (AIPCE-CEP) suggested that, at the next meeting, the FG should determine the most relevant trade instruments and species/products. Then, it would be worth it to contact the European Commission.

The Chair agreed with the inclusion of data on imported certified fisheries, as proposed by Linnéa Engström.

AOB

- **Date of the next meeting**

The members agreed that the next meeting would take place in the first week of March 2021. The Secretariat will circulate a Doodle poll to determine the exact date.

Summary of action points

- Identification of relevant trade instruments and species/products:
 - Secretariat to circulate email asking members to choose
 - Mike Turenhout to prepare balance sheets on trade flows



List of attendees

Representative	Organisation
Guillaume Carruel	EAPO
Katarina Sipic	AIPCE-CEP
Katrin Poulsen	WWF
Linnéa Engström	MSC
Mike Turenhout	Visfederatie
Pedro Reis Santos	MAC Secretariat
Poul Melgaard Jensen (Chair)	Danish Seafood Association
Stavroula Kremmydiotou	MAC Secretariat
Vanya Vulperhorst	Oceana

