

Initial Focus Group on Trade - Report

Terms of Reference:

....review available information on existing trade policy instruments and their impact through import on the EU market for fishery products...

Purpose:

- **Collect data on imports of the EU market of fisheries and aquaculture products in the frame of various trade policy instruments,**
- **Contribute with factual information to the development of an advice on trade policy instruments by WG 2**

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Focus Group members:

Secretariat: Pedro Reis Santos (MAC)

Sector	Organisation	Representative
Primary producers (catching sector)	- EAPO	- Zarah Bellefroid
Processors, traders, suppliers, and retailers	- Visfederatie - AIPCE-CEP - Danish Seafood Association	- Mike Turenhout - Katarina Sipic - Poul Melgaard Jensen (Chair)
Other Interest Groups	- MSC - WWF - Oceana	- Linnéa Engström - Agnieska Korbel - Ignacio Fresco Vanzini / Vanya Vulperhorst

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Report in 3 parts:

Part 1: Data on trade balances. EU market = EU production (fisheries + aquaculture) + import - export. AIPCE Finfish Study (2021) and data from DG Mare and DG Trade.

Part 2: List individual trade instruments within 5 overall groups. For each instrument: Species, products and conditions for market access. Including also fisheries agreement with 3rd countries (SFPA's).

Part 3: For 8 selected species: Individual trade instruments relative significance for each species (i.e.: Cod is imported 40 pct. via instrument A, 25 pct. via instrument B and 35 pct. via “tariff rate”/MFN-duty. DG Trade: Preference Utilization Rates (PUR) on the share of the import for which preferential trade instruments have been applied.

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Example trade instrument: Trade and Cooperation Agreement EU-UK ("Brexit")

Trade measure	Serial number	Species/products	Conditions for market access
United Kingdom Trade and Cooperation Agreement "Brexit"	 09.6002 09.6004	Chapter 03, heading 1604 + 1605 - Canned tuna (1604.14.00.00) - Canned tuna (1604.20.70.00)	0 % <u>Rules of origin apply:</u> 'Wholly obtained' Bilateral cumulation CC: Change in chapter from non-originating materials provides for preferential origin: - Canned tuna (3.000 tons (0 %)) - Canned tuna (4.000 tons (0 %)) - CN 1604.19 - Preparations of surimi Tolerance rules apply (allowance for raw material from non-party countries)

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Conclusions and recommendations:

EU vessels catches outside EU waters: How does it enter market(s) (locally or EU?) and what is the relative importance for (supplying) the EU market?

Datasets and calculations missing and needed to get a complete picture and account of all sources to - and ways into - the EU seafood market

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Conclusions and recommendations:

Current trade data sources do not allow for separate statistics on *wild catch* and *aquaculture* (relevant distinction in relation to many issues: IUU, food safety, social standards etc.)

Trade data allowing for separate accounts of *wild catch* and *aquaculture*

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Conclusions and recommendations:

No current data set allows for listing of individual trade instruments according to their relative importance (for species and products) for supplying the EU market (ex. GSP, ATQ, FTA's, origin-derogations etc.). The "PUR" only shows how one overall group of instruments are utilized – not specified on single trade instruments within the group

Such data is important if not a precondition for providing qualified advice on the impact of trade policy instruments and advice in public consultations on trade agreements launched by the Commission

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Conclusions and recommendations:

All data on production and trade (amounts) need to be converted into live weight/WFE to arrive at consistent trade balances (and Live weight conversion rates adjusted to current production methods).

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Conclusions and recommendations:

DG Trade yearly report on Trade Agreements do not provide any separate analysis and data specific for seafood (overall or for species/products).

A dataset for fish and fishery products is called for as a precondition for assessing the significance of Trade Agreements for the EU market for fish and fishery products