

## **WORK PROGRAMME FOR MARKET AC**

**Period: 01/10/2023 to 30/09/2024 (Year 8)**

### **Background**

As determined by point (b) of paragraph 2 of Article 43 of the Common Fisheries Policy Regulation, the Market Advisory Council (MAC) was established to promote a balanced representation of all stakeholders and to contribute to the achievement of the policy's objectives in the field of the EU market of fisheries and aquaculture products. The MAC was founded in 2016 under the legal form of a non-profit organisation based in Brussels and co-funded by the European Commission.

The General Assembly of the MAC is composed of 64 European, national and local organisations from 12 Member States (Belgium, Croatia, Denmark, France, Germany, Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden), representing the entire value chain (fisheries producers, aquaculture producers, processors, traders, suppliers, retailers, trade unions) and other interest groups (environmental and development NGOs). The Executive Committee of the MAC is currently composed of 21 members distributed in the following manner:

<b>Value Supply Chain (60%)</b>	
Primary Producers (Catching)	
	EAPO
	Europêche
	COPA-COGECA
	Killybegs Fishermen's Organisation
	Les Pêcheurs de Bretagne
Primary Producers (Aquaculture)	
	EMPA
	FEAP
Processors, traders, suppliers and retailers	
	AIPCE
	CEP
	European Fishmeal
	EuroCommerce
	FEDEPESCA
	CONXEMAR
	ANFACO-CECOPECA
Workers (Trade Unions)	
	ETF
<b>Other Interest Groups (40%)</b>	
	MSC
	Oceana
	WWF
	ClientEarth
	EJF
	Good Fish

In line with Article 7a of Commission Delegated Regulation (EU) 2015/242, the MAC subjected itself to an independent performance review, which resulted in the adoption of a report in March 2022<sup>1</sup>.

<sup>1</sup> <https://marketac.eu/performance-review-2019-2022/>

## Mission and objectives of the MAC

### MAC WORK PRIORITIES

#### Overarching long term and short-term work priorities (at least 3 priorities)

##### 1) Sustainable Food System Framework

In the context of the European Green Deal, the European Commission adopted the Farm to Fork Strategy to comprehensively address the challenges of sustainable food systems and to recognise the links between health people, healthy societies and a healthy planet. The Farm to Fork Strategy announced the adoption of a horizontal framework law<sup>2</sup> to accelerate and facilitate the transition and ensure that foods placed on the EU market increasingly become sustainable.

The legislative proposal, which is planned to be tabled during the third quarter of 2023, aims to integrate sustainability into all food-related policies. It will lay down general principles and objectives, together with the requirements and responsibilities of all actors in the EU food system. More specifically, it will lay down rules on sustainability labelling of food products, minimum criteria for sustainable public procurement of food, governance and monitoring.

Work initiated by DG MARE on the revision of the marketing standards framework of fishery and aquaculture products, including the development of sustainability criteria by STECF, will be integrated into the mentioned legislative proposal.

##### 2) Trade Agreements & Trade Policy Instruments

The EU market is heavily dependent on imported supplies to meet consumer demand. As part of its work to improve understanding of consumption trends and price developments, the MAC will continue to monitor and offer advice on both offensive and defensive opportunities in relation to the various ongoing EU negotiations with third countries on possible new free trade deals. The EU market is not only affected by multilateral and bilateral trade agreements, but also by other policy instruments such as the Generalised Scheme of Preferences (GSP, Everything But Arms, GSP+) and the ATQs Regulation.

As an example of the continuous relevance of this topic, under the sixth operational year, the Initial Focus Group on Trade prepared a report on existing EU trade policy instruments and their impacts on the EU market<sup>3</sup>, which led to the adoption of advice on the improvement of data concerning trade policy instruments and their impact<sup>4</sup>.

##### 3) Illegal, Unreported and Unregulated (IUU) Fishing & Global Governance

The EU is a pioneer in the global fight against IUU fishing and the European Commission has taken a leadership position by promoting a “zero-tolerance” approach to IUU fishing. The EU IUU Regulation established an EU-wide system to prevent, deter and eliminate the import of IUU fishery products into the EU market and promotes reforms in third countries through its “carding system”. The Commission services have continuously updated the MAC on the cooperation with third countries and corresponding evaluations to promote reforms. As practice from previous years, the MAC will continue to produce advice to the European Commission on an *ad hoc* basis when significant

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<sup>2</sup> [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/13174-Sustainable-EU-food-system-new-initiative\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/13174-Sustainable-EU-food-system-new-initiative_en)

<sup>3</sup> <https://marketac.eu/wp-content/uploads/2022/03/Initial-Focus-Group-on-Trade-Report-21.03.2022.pdf>

<sup>4</sup> <https://marketac.eu/trade-policy-instruments-and-impact-on-the-eu-market-for-fishery-and-aquaculture-products-improvement-of-data/>

cases of IUU fishing products entering the EU market are known or when actions take place under the “carding system”<sup>5</sup>.

#### 4) European Market Observatory for Fisheries and Aquaculture (EUMOFA)

As the European Commission’s market intelligence tool, EUMOFA increases market transparency and efficiency, analyses EU market dynamics and supports business decisions and policymaking. The ex-post information provided by EUMOFA on volumes, values and prices of fisheries and aquaculture products, including imports and exports, is greatly appreciated by the members for the MAC. Among these, the annual “The EU Fish Market” has particular importance and the MAC aims to maintain the established annual exchange of views on this report.

#### 5) Landing Obligation

In line with Article 15(14) of the CFP Regulation, the European Commission reports annually on the implementation of the landing obligation based on information transmitted by the Member States, the Advisory Councils and other relevant sources. The landing obligation can have a significant socioeconomic impact on the market, including through the need for outlets for catches below minimum conservation reference sizes and the development of new market segments for unwanted catches. Due to the permitted discards under temporary exemptions to the landing obligation, there might also be problems of data availability and quality, which impacts the reliability of information, on a regional basis, on the market effects of the implementation of the landing obligation. As stated in previous MAC advice on the topic, the effects of undersize fish on the market appear to be negligible. In the upcoming operational year, it is relevant to analyse whether new developments will take place.

#### 6) Scientific, Technical and Economic Committee for Fisheries (STECF)

The MAC has an established collaboration with STECF, which is particularly focused on the Annual Economic Report on the EU fishing Fleet, the Economic Report of the EU Aquaculture Sector, and the Economic Report of the EU Fish Processing Industry. The practice includes presentations and exchanges of views on the mentioned reports. The MAC will also aim to ensure representation, as observers, in the relevant STECF Expert Working Group meetings. When appropriate, the MAC will also provide feedback on the reports, promote the submission of additional data by the members, and suggest topics of specific analysis, such as species, fleet segments, and geographical areas that should be considered by STECF, as well as more detailed data on aquaculture and processing.

#### 7) Fisheries Control Regulation

Following exactly five years of negotiations on the revision of the EU fisheries control system regulation, on 30 May 2023, a political agreement was stroke between the co-legislators. Considering the relevance for the entire supply chain of the provisions of the Control Regulation, the MAC will analyse the impacts of the agreed new rules to provide advice on the market-related aspects, such as relation with the Common Market Organisation Regulation and food law, labelling, information to consumers, traceability, simplification and digitalisation, and the entry into force of the CATCH IT tool. The MAC will keep in mind the 5 years transitional period foreseen for the application of extended traceability rules to processed fisheries and aquaculture products including the related feasibility study by the Commission.

#### 8) Substantiating Environmental Claims and Product Environmental Footprint Category Rules (PEFCR) for unprocessed Marine Fish products

On 22 March 2023, the European Commission published a legislative proposal on substantiation and communication of explicit environmental claims. Prior to the publication of the proposal, DG ENV asked external

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<sup>5</sup> E.g., <https://marketac.eu/iuu-fishing-by-ghana/>

experts (“Technical Secretariat”) to develop Product Environmental Footprint Category Rules (PEFCR) for unprocessed Marine Fish Products (both wild catch and farmed), which will be relevant for the substantiation of claims. The launch of second open publication consultation by the Technical Secretariat is still pending<sup>6</sup>. In the past, the MAC adopted advice on the green claims initiative and on the PEFCR project, but decided that further work would wait for the second consultation.

### **Work priorities identified for each Working Group and Focus Group (where available)**

#### Working Group 1 (EU Production):

- Common Market Organisation (production and marketing plans, producers and interbranch organisations, planning, stabilisation of markets)
- European Maritime and Fisheries and Aquaculture Fund
- Marketing Standards framework
- Implication of Fisheries Control Regulation on EU production
- Landing obligation (e.g., available uses, market outlets, effects on prices, socioeconomic aspects, infrastructure and cooperation across the supply chain)
- EUMOFA case studies
- Economic viability of the fleet and of the aquaculture sector (collaboration with STECF)
- Sustainability criteria for fishery and aquaculture products

#### Working Group 2 (EU Markets):

- Supply (annual status and trends)
- Trade with third countries (Community Customs Code, General System of Preferences, Free Trade Agreements, Economic Partnership Agreements, World Trade Organisation)
- Imports and tariffs (tariff suspensions, tariff quotas)
- Price developments “from sea to table”
- Market trends and consumer behaviour (responsible sourcing and processing)
- Fight against IUU fishery products
- Implication of Fisheries Control Regulation EU market (traceability along the supply chain/ transmission of consumer information)
- Economic performance of the EU fish processing sector (collaboration with STECF)

#### Working Group 3 (EU Controls and Sanitary Issues, Consumer Rules):

- Consumer information and labelling (FIC and CMO)
- Voluntary information, including certification schemes
- Hygiene and sanitary issues
- Plastic and marine pollution
- Substantiation and communication of explicit environmental claims
- Product Environmental Footprint Category Rules for Marine Fish

### **Other issues of interest if any:**

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<sup>6</sup> <https://www.marinefishpefcr.eu/copy-of-resources>

- Farm to Fork Strategy initiatives
- EU taxonomy and technical screening criteria for fishing and aquaculture activities
- Energy transition of the EU's fisheries and aquaculture sector
- Action Plan to protect and restore marine ecosystems
- EU Algae Initiative

**Planned recommendations for year 8:**

No	Issue/subject	Link with the CFP	WG/FG at the origin of the recommendation	Planned date of adoption (if available)
1	Substantiation and communication of explicit environmental claims (legislative proposal)	Article 2.5.g)	WG3	November 2023
2	Work Programme of EUMOFA, including suggestions of analysis topics and talks	Article 2.5.g)	WG1	January 2024
3	Analysis of market-related aspects of the new Fisheries Control Regulation	Article 2.5.g)	WG2	January 2024
4	Legislative Proposal on Sustainable Food System Framework	Article 2.5.h)	WG3	January 2024
5	2024 Annual Economic Report on the EU Fishing Fleet	Article 2.5.c)	WG1	January 2024
6	Annual Report on the implementation in 2023 of the landing obligation (particularly new developments when compared to previous advice)	Article 2.5.a)	WG1	March 2024
7	Energy Transition (increase of operational input costs)	Article 2.5.c)	WG1	March 2024
8	Marine Action Plan	Article 2.5.c)	WG1	March 2024
9	Illegal, Unreported and Unregulated (IUU) Fishing	Article 2.5.g)	WG2	May 2024
10	Development of sustainability criteria for fishery and aquaculture products	Article 2.5.g)	WG1	May 2024
11	Annual EU-UK Trade and Cooperation Agreement implementation report (Border Target Operating Mode)	Article 2.5.g)	WG2	May 2024
12	2023 Economic Report on the Fish Processing Industry	Article 2.5.c)	WG2	September 2024
13	Integration of sustainability considerations in the Additional Tariff Quotas (ATQs) framework	Article 2.5.g)	WG2	September 2024
14	Product Environmental Footprint Category Rules (PEFCR) for unprocessed Marine Fish products	Article 2.5.g)	WG3	September 2024

**Planned participation to Commission public consultations**

Topic/subject	Link with the CFP	Deadline for the EU Survey (if available)	Planned date for adoption (if available)

MAC planning of meetings

MAC PLANNING OF MEETINGS (from 01/10/2023 to 30/09/2024)

No	Date (for the first 6 months, please provide precise dates)	Topics / Subjects of meeting	Type of meeting (physical/planned/hybrid)	European Commission participation requested (yes/no)	If Commission participation requested, specific issues to be dealt with	Priority for a Commission participation (from 1 to 4) (1= highest priority)
1	November 2023	<ul style="list-style-type: none"> <li>- EUMOFA (Work Programme)</li> <li>- Action Plan to protect and restore marine ecosystems</li> <li>- Marine Action Plan</li> </ul>	Working Group 1 Online (Zoom)	Yes	- Presentation of EUMOFA 2024 Work Programme	2
2	November 2023	<ul style="list-style-type: none"> <li>- Fisheries Control Regulation</li> </ul>	Working Group 2 Online (Zoom)	Yes	- Update on Fisheries Control Regulation	2
3	November 2023	<ul style="list-style-type: none"> <li>- Sustainable Food System Framework</li> <li>- Substantiation and communication of explicit environmental claims</li> </ul>	Working Group 3 Online (Zoom)	Yes	- Presentation of legislative proposal on Sustainable Food System Framework	2
4	November 2023	<ul style="list-style-type: none"> <li>- Adoption of advice</li> </ul>	Executive Committee Online (Zoom)	No		
5	January 2024	<ul style="list-style-type: none"> <li>- Sustainability Criteria</li> <li>- EUMOFA (Work Programme)</li> <li>- Energy transition of the EU's fisheries and aquaculture sector</li> <li>- Energy Transition</li> </ul>	Working Group 1 Physical (Brussels)	Yes	- Update on STECF EWG on Sustainability Criteria	2

6	January 2024	<ul style="list-style-type: none"> <li>- EUMOFA's 2023 EU Fish Market Report</li> <li>- Trade</li> <li>- AIPCE's Finfish Study</li> </ul>	Working Group 2 Physical (Brussels)	Yes	<ul style="list-style-type: none"> <li>- Presentation of EUMOFA EU Fish Market</li> <li>- Update on trade developments</li> </ul>	2
7	January 2024	<ul style="list-style-type: none"> <li>- Product Environmental Footprint Category Rules (PEFCR) for unprocessed Marine Fish products</li> <li>- Sustainable Food System Framework</li> </ul>	Working Group 3 Physical (Brussels)	Yes	<ul style="list-style-type: none"> <li>- Update on work of PEFCR Technical Secretariat</li> </ul>	2
8	January 2024	<ul style="list-style-type: none"> <li>- Adoption of advice</li> <li>- Update on work and finances</li> </ul>	Executive Committee Physical (Brussels)	No		
9	March 2024	<ul style="list-style-type: none"> <li>- Landing obligation</li> <li>- Sustainability Criteria</li> <li>- Energy Transition</li> <li>- Marine Action Plan</li> </ul>	Working Group 1 Online (Zoom)	Yes	<ul style="list-style-type: none"> <li>- Exchange of views on landing obligation reports</li> </ul>	2
10	March 2024	<ul style="list-style-type: none"> <li>- Trade</li> <li>- IUU Carding System</li> <li>- SFPAs</li> <li>- EU-UK Trade and Cooperation Agreement</li> </ul>	Working Group 2 Online (Zoom)	Yes	<ul style="list-style-type: none"> <li>- Update on trade developments</li> <li>- Update on IUU carding system</li> <li>- Update on SFPAs</li> </ul>	2
11	March 2024	<ul style="list-style-type: none"> <li>- Substantiating Green Claims</li> </ul>	Working Group 3 Online (Zoom)	Yes	<ul style="list-style-type: none"> <li>- Update on legislative proposal on green claims and PEFCR</li> </ul>	2
12	March 2024	<ul style="list-style-type: none"> <li>- Adoption of advice</li> <li>- Update on work and finances</li> </ul>	Executive Committee Online (Zoom)	No		2
13	May 2024	<ul style="list-style-type: none"> <li>- Sustainability Criteria</li> </ul>	Working Group 1 Physical (Brussels)	Yes	<ul style="list-style-type: none"> <li>- Exchange of views on sustainability criteria</li> </ul>	2
14	May 2024	<ul style="list-style-type: none"> <li>- Trade</li> <li>- IUU Fishing</li> <li>- ATQs</li> <li>- EU taxonomy and technical screening criteria</li> </ul>	Working Group 2 Physical (Brussels)	Yes	<ul style="list-style-type: none"> <li>- Update on trade developments</li> <li>- Update on revision of ATQs framework</li> <li>- Update on EU taxonomy</li> </ul>	2



15	May 2024	- Product Environmental Footprint Category Rules (PEFCR) for unprocessed Marine Fish products - Farm to Fork Strategy	Working Group 3 Physical (Brussels)	Yes	- Update on Farm to Fork Strategy initiatives	2
16	May 2024	- Adoption of advice - Update on work and finances	Executive Committee Physical (Brussels)	No		
17	July 2024	- Preparation of Work Programme and Budget of Year 9	Executive Committee Online (Zoom)	No		
18	September 2024	- Presentation of STECF Economic Report on Fish Processing Industry	Working Group 1 Physical (Brussels)	Yes	- Exchange on STECF report	2
19	September 2024	- Trade - IUU Fishing - ATQs	Working Group 2 Physical (Brussels)	Yes	- Update on trade developments	2
20	September 2024	- Product Environmental Footprint Category Rules (PEFCR) for unprocessed Marine Fish products	Working Group 3 Physical (Brussels)	Yes	- Exchange of views on PEFCR	2
21	September 2024	- Update on work done and finances - Approval of Work Programme and Budget for Year 9 - FAO COFI Meeting	General Assembly Physical (Brussels)	No		