

## Working Group 1: EU Production

### Minutes

Wednesday, 7 June 2023 (10:00 – 13:30 CET)

BusinessEurope, Av. de Cortenbergh 168, 1000 Brussels

Interpretation in EN, ES, FR

#### Welcome from the Chair, Julien Lamothe

Click [here](#) to access the Chair's presentation.

**Adoption of draft agenda and of the last meeting minutes (28.03.23):** adopted

#### Action points of the last meeting

- **State-of-play of the decision made during the last meeting – information**
- European Market Observatory for Fisheries and Aquaculture (EUMOFA):
  - Secretariat to provide the contacts of aquaculture representatives to the European Commission for potential further questions on the study on the challenges of aquaculture products in food outlets
  - Agreed draft advice on tuna studies to be put forward to the Executive Committee for consideration and potential approval
    - Contacts provided (EMPA, FEAP, APROMAR)
    - Advice adopted: 30 March 2023 | Commission's reply: 25 May 2023
- Scientific, Technical and Economic Committee for Fisheries (STECF):
  - Under the draft agenda of the next meeting, consideration of draft advice on the Economic Report on the EU Aquaculture Sector, which will be developed by the Aquaculture Advisory Council, to be scheduled
    - Agenda item scheduled
- Landing Obligation:
  - Agreed draft advice to be put forward to the Executive Committee for consideration and potential approval
    - Advice adopted: 30 March 2023 | Commission's reply: 23 May 2023
- Awareness and Role of Producer Organisations (POs):
  - Under the draft agenda of the next meeting, presentation by OPP72 about projects financed by their Production and Marketing Plan to be scheduled
    - Agenda item scheduled



- Production and Marketing Plans:
  - Agreed draft advice to be put forward to the Executive Committee for consideration and potential approval
    - Advice adopted: 30 March 2023 | Commission's reply: pending
- Vice-Chair:
  - Chair to inform the Executive Committee about the lack of expressions of interest, plus to schedule the agenda item again in a future meeting
    - Executive Committee informed at the 30 March 2023 meeting

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

- **Exchange of views about methodology for study on the supply chain of EU tuna sector within the global tuna market with Laurène Jolly, DG MARE A4**

The Chair recalled that advice to the Commission had been adopted suggesting the undertaking of an EUMOFA study about the EU tuna sector. In their letter of reply, the Commission asked the MAC to narrow the scope and to prioritise among the different topics to be covered. According to the letter, there are also aspects that are not feasible due to a lack of data and available information. Plus, several assessments of impact on the EU market of EU legislation fall outside the scope of EUMOFA.

Laurène Jolly (DG MARE) highlighted that the requested study qualified more as an overview of the tuna market than the usual price transmission studies done by EUMOFA. Ms Jolly explained that this was not a problem, since EUMOFA was able to provide *ad hoc* studies, which integrate qualitative aspects. Nevertheless, the scope of the request was too large to be covered by an EUMOFA study. Therefore, the MAC was encouraged to select one of the topics as the theme for a study. The Commission representative explained that some of the aspects were not feasible due to lack of data and available for EUMOFA, plus some other aspects were outside of the scope of EUMOFA. Assessments of the impact of EU legislation are done via evaluations of policy frameworks, which is outside of the scope of EUMOFA.

Pierre Commère (ADEPALE) thanked Ms Jolly for the comprehensive reply to the advice. Mr Commère emphasised that the tropical tuna chain was quite complex, requiring detailed analysis. The advice includes requests from the fishing sector and from other sectors of the supply chain, in order to better understand the evolution of the market and the impact of latest crises. In his view, the undertaking of a comprehensive study would be very relevant for the tuna sector. From AIPCE-CEP's perspective, the focus should be on market trends and on the impact of the recent crises. On the other hand, Europêche prefers a focus on raw material and semi-transformed materials. He stated that more time was needed for discussion between the different stakeholders to make a selection of priorities.

Anne-France Mattlet (Europêche) emphasised that, in the view of the EU tuna fleet, the tuna market, which is quite complex, deserved a comprehensive study. Ms Mattlet agreed that more time was needed to agree on the selected priorities, considering the limitations mentioned by Ms Jolly.



The Chair commented that, due to the specificity of the scope of EUMOFA, it would be necessary to prioritise topics, but also that it could be relevant to look for an alternative framework. The Chair suggested to, considering the topics that were not feasible, discuss more in depth the scope of EUMOFA and data accessibility.

Pierre Commère (ADEPALE) commented that the representatives of the processing industry wanted to focus more on market trends and the recent crises, while the fishing industry wanted to focus more on the raw material and semi-processed products. Therefore, more discussion was needed. In his view, all the priorities would be relevant.

Anne-France Mattlet (Europêche) asked Ms Jolly to provide more information on what could be done for each of the five potential topics. Based on the letter of reply, it seems that the topic of production and raw material would be quite difficult for EUMOFA to address. A trade flow analysis seems to be feasible, but with limited data. In the case of the defrosted market, it seems that only a qualitative analysis would be possible, so she wondered whether EUMOFA would analyse only a few stakeholders or whether the kinds of products available in the market would be analysed.

Laurène Jolly (DG MARE) responded that, on production and raw material, EUMOFA was able to provide quantitative data, since the data existed. Information on the status of the product at landing would not be possible, since these details are not available. Concerning the defrosted market, a qualitative analysis means that EUMOFA does not enough data for a quantitative analysis. In any case, EUMOFA would prepare a concept note, which would include method, list of stakeholder interviews and scope (including representative sample). If not feasible, EUMOFA reduces the scope to a specific number of Member States or species. Ms Jolly highlighted that, after the selection of a topic, it was also a matter of inputs and availability of stakeholders to participate. In previous experiences with the tuna sector, contacts with stakeholders and collection of data were quite difficult.

The Secretary General wanted to know, from the five topics identified, how many the Commission would be willing to cover in a study, plus whether several studies would be possible.

Laurène Jolly (DG MARE) responded that, considering the corresponding sub-topics, each topic would be sufficient for one EUMOFA study. As an example, a study on production and raw material, meant an analysis of production data, qualitative data on certification schemes, production in RFMOs. It requires consultation of several Member States. Ms Jolly encouraged members to focus on one of the five priorities. Regarding the undertaking of several studies, it would be possible, but distributed across the upcoming years. A first study would not be feasible before 2024.

- **Way forward**

The Chair recognised the complexity of the topic and the need for a balance between the different views of the industry, which would require further discussion among the representatives.



## Common Market Organisation

- **Presentation on initiatives related to Producer Organisations foreseen under the report on the functioning of the CMO by Paul Thomas, EAPO**

Click [here](#) to access the presentation.

The Chair recalled that, at the last meeting of the Executive Committee meeting, a Commission representative delivered a presentation about the report on the functioning of the CMO Regulation. The aim of the presentation of EAPO was to focus on the role of Producer Organisations.

Paul Thomas (EAPO) stated that, overall, from the perspective of the Producer Organisations, the Commission's report on the functioning of the CMO Regulation was quite positive. The report highlights the pivotal role of Producer Organisations.

Mr Thomas outlined that, according to the report, for small-scale fishery products, joining an existing Producer Organisation, resulting in a mixed Producer Organisation, is not a solution, as it does not always address the specific needs of small-scale coastal fishery producers. He highlighted that, in the view of EAPO, every Member State has its own specificities. Across the Member States, there are gear-specific Producer Organisations (e.g., pelagic, demersal) as well as mixed Producer Organisations. In the mixed ones, there is a variety of different métiers, which, historically, refer to regional specificities. Only a very small percentage of vessels, including both small-scale and large-scale, do not participate in Producer Organisations. This demonstrates the importance of Producer Organisations in the management of quotas.

On the functioning of the Producer Organisations and the representativeness of fishers, Mr Thomas explained that most Producer Organisations have an Executive Committee and a General Assembly. Most Producer Organisations function under the system that one fisher represents one vote, translating into equal representativity in the decision-making. Several Producer Organisations have set-up specific measures to address the needs of small-scale fisheries, including specific port-by-port meeting to receive feedback, optimisation of the quotas made available to the Producer Organisation, and marketing aid, and legal, administrative aid to access EU funding.

On competition rules, Mr Thomas recalled that the Common Market Organisation Regulation foresees a derogation for Producer Organisations to Article 101(1) of the Treaty on the Functioning of the European Union. Thanks to the derogation, Producer Organisations are allowed to take common decisions with an effect on EU competition. Producer Organisations organise the market through fisheries management, landing schemes planning, certification schemes, storage mechanisms, and processing tools. He emphasised that these measures were essential to the work of Producer Organisations, allowing fishers to receive a high price for their products.

On promoting marketing, quality and added value, Mr Thomas drew attention to specific objective 2.2. of the European Maritime Fisheries and Aquaculture Fund, highlighting the amounts planned by several Member States for this specific objective, which also includes financial support for Production and Marketing Plans. Only a small percentage of the mentioned amounts go towards Producer



Organisations. He underscored that, across the different Member States, there was a significant discrepancy on the funds allocated to promoting marketing, quality and added value. In the Commission's report, it is also highlighted that there is a differential treatment of Producer Organisations by national administrations.

Mr Thomas emphasised the importance of Production and Marketing Plans, which are a mandatory provision in the Common Market Organisation Regulation, meaning that Producer Organisations are legally obliged to adopt these. The plans show how Producer Organisations work to achieve sustainability and how they address the objectives in the Common Fisheries Policy, such as the obligations related to the landing obligation. The plans help supply and demand to come together. Regarding sustainability, Production and Marketing Plans allow for improvement of knowledge and management of important species, improvement of production conditions and limitation of environmental impacts, development of new outlets for production, development of quality approaches, awareness and training sessions, and communication actions towards consumers. He provided specific examples of the sustainability measures, including scientific projects.

Mr Thomas insisted on the need for a level-playing-field on funding of Production and Marketing Plans across the Member States. As a conclusion, he stated that the Commission's report was very positive and highlighted the pivotal role of Producer Organisations in achieving the objectives of the Common Fisheries Policy, while ensuring economic sustainability. He highlighted that the Commission's report made reference to the ongoing revision of the marketing standards framework, which would be addressed through the upcoming Sustainable Food System Framework. Plus, on transnational Producer Organisations, the Commission's report indicates that the Commission has made the necessary tools available.

- **Exchange of views**

Garazi Rodríguez (APROMAR) wanted to know the year of the data on the funds foreseen per Member State for specific objective 2.2 of the European Maritime Fisheries and Aquaculture Fund.

Paul Thomas (EAPO) responded that these were the funds under the European Maritime Fisheries and Aquaculture for 2021 to 2027.

Nicolás Fernández Muñoz (OPP72), on the funds for specific objective 2.2, commented that, at first view, it gives the impression that Spanish Producer Organisations receive much more funding than others. Some Spanish Producer Organisations manage a significant quantity of quotas. In the case of his Producer Organisation, the Production and Marketing Plan allows for onshore small-scale operators to be viable in three different ports. Mr Fernández emphasised that it was important to look into the outcomes of the funding. In each Member State, there can be different concepts on the role of Producer Organisations, leading to different criteria in the establishment and funding of Producer Organisations, particularly for small-scale fisheries. The European Commission should work on the development of equal conditions for fisheries across the EU.

Maria Luisa Álvarez Blanco (FEDEPESCA) congratulated the Producer Organisations for their extraordinary work, particularly in Spain. Ms Álvarez argued that, when fishers become marketers,





creating companies to sell fishery products to consumers, the rules that apply to other market operators should also apply to them. Direct sales from producers to consumers creates competition against retailers.

Juana María Parada Guinaldo (OR.PA.GU.) drew attention to the role of Transnational Producer Organisations, arguing that the rules for these organisations should be further developed, particularly on what they can do. Her Producer Organisation manages stocks on the border between Spain and Portugal. Due to the current rules, the Portuguese and Spanish fleets must be managed separately.

Pedro Luis Casado López (OPP80) agreed with Ms Parada. His Producer Organisation is also a Transnational Producer Organisation, which translates into difficulties in the management of quotas between Portugal and Spain. In some cases, it makes it impossible to freely market products in the EU market.

The Chair, in relation to the market aspects, highlighted that the adoption of the revision of the Fisheries Control Regulation was undergoing, which would require further analysis. The Chair recognised that, across the EU, Producer Organisations operated differently.

Paul Thomas (EAPO), concerning the diversity of Production Organisations and actions, recalled that, in February 2023, advice on “awareness of the role of Producer Organisations” was adopted. Under the advice, there was a commitment to write a document listing rules on competition and on Production and Marketing Plans.

Christophe Vande Weyer (DG MARE) recalled that the MAC had updated its “Guidelines & Good Practices: Production & Marketing Plans” document, which was directed at Producer Organisations, plus that the MAC had recommended the circulation of the document to the Member States. DG MARE circulated the document to the Member States through the Expert Group for Markets and Trade in Fishery and Aquaculture Products and the geographical desks of DG MARE.

Mr Vande Weyer recognised that the European Maritime Fisheries and Aquaculture Fund does not provide the level of detail that would allow to know the exact figures allocated to Production and Marketing Plans. In comparison with the previous fund, it allows for more flexibility in the allocation of resources. There is significant heterogeneity across Member States concerning the financial support provided. The Member States and the Producers Organisations have flexibility to negotiate the level of financial support as well as the content of the Production and Marketing Plans.

Mr Vande Weyer recognised that, as described in the Commission’s report, there are difficulties in the implementation of Transnational Producer Organisations. The role of these organisations is clear. The recognition is done by the Member State where the headquarter is set. Nevertheless, there are difficulties related to financing. According to the Common Market Organisation Regulation, Member States should agree on the administrative arrangements, which might not provide sufficient direction on the role of the different entities involved. The Commission remains available to discuss with the national administrations and with the producers to find concrete solutions.



Mr Vande Weyer recalled that, as announced in the report, the Commission initiated a control on Member States to determine whether Member States carried out the necessary checks on Producer Organisations, as foreseen in the Common Market Organisation Regulation, so that recognition can be maintained. A letter was sent to Member States asking for information on the checks carried out. Based on the replies, the Commission will determine the need for further controls. He committed to informing the members on due time.

Mr Vande Weyer informed that the European Parliament initiated an own-initiative report on the Common Market Organisation Regulation. A draft report was expected to be finalised soon. The Commission services would be meeting, in the near future, with the European Parliament to provide clarifications. As the Commission will reply to the recommendations in the Parliament's own-initiative report, it will be another opportunity to underline certain points of importance to the sector.

- **Way forward**

The Chair proposed to continue following developments on the Common Market Organisation. The role of Producer Organisations should continue to be highlighted.

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

- **Update on proposal of joint advice on the Economic Report on the EU Aquaculture Sector, by Cécile Fouquet, Secretary General, Aquaculture Advisory Council (AAC)**

Click [here](#) to access the presentation.

The Chair recalled that, at the previous meeting, there was an exchange about the STECF's Economic Report on the EU Aquaculture Sector. It was agreed that joint advice with the Aquaculture Advisory Council would be developed.

Cécile Fouquet (AAC) stated that the purpose of the draft advice was to call on the Commission to ask STECF to introduce an analysis of economic sustainability in the biennial "Economic Report on the EU Aquaculture Sector". The draft was prepared by Mr Brian Thomsen (Dansk Akvakultur). The draft was presented to the AAC's Working Group 3 and was circulated for comments. The adoption by the AAC was foreseen by July-August 2023, in line with the MAC's deadline of September 2023.

Ms Fouquet explained that the introduction of the draft text mentioned several policy documents that referred to sustainability concepts. In the view of the AAC, clear targets and indicators need to be developed, which is in line with the MAC's advice on the incorporation of sustainability aspects in the marketing standards framework. The STECF's report on criteria and indicators of sustainability for seafood products notes that economic issues are comparatively less addressed than environmental and social issues. The study on the state-of-the-art scientific information on the impacts of aquaculture activities in Europe notes that economic impacts of aquaculture are often not addressed by literature.

Ms Fouquet highlighted five economic performance indicators were included in the last STECF report: Gross Value Added, Return on Investment, Earnings Before Interest and Taxes, labour productivity,



and capital productivity. In her view, these indicators are sufficient, but the report lacks discussion, analysis and conclusions about these. Economic sustainability needs to be analysed because an activity's sustainability is based on three interdependent pillars. There is a need to monitor progress towards sustainability, so indicators of economic sustainability must be set to assess it. The STECF already provides for a wide coverage of the activity since the inclusion of freshwater aquaculture in the data collection framework.

Ms Fouquet informed that the AAC reached out to Mr Rasmus Nielsen, Chair of the relevant Expert Working Group of STECF, who expressed agreement with the formulation to request the European Commission for the inclusion of these aspects in the Terms of Reference.

- **Consideration of joint draft advice**

Javier Ojeda (FEAP) emphasised the importance of the draft advice for aquaculture producers as well as the value of a common position between the AAC and the MAC. In his view, when comparing to environmental and social sustainability, the Commission services dedicate significantly less time to economic sustainability. The economic pillar is fundamental for the future of the activity in the EU.

Bruno Guillaumie (EMPA) expressed agreement with Mr Ojeda. The draft advice would be in line with the Commission's recognition of aquaculture as part of the solution to feed the planet. For existing and future undertakings, it is important to know the profitability of the sector. In the case of the shellfish sector, every year, there is almost a 60% mortality rate, which means that almost 60% of the turnover disappears. An improvement of environmental sustainability and of the mortality rate would also mean an improvement of economic sustainability. Mr Guillaumie highlighted the draft advice would also be in line with previous requests from the MAC to EUMOFA. He encouraged his fellow members to support the joint draft advice.

Frangiscos Nikolian (DG MARE) encouraged members to, in their recommendations, be as comprehensive as possible, especially by identifying the relevant economic sustainability indicators. The Terms of Reference to the STECF's Expert Working Group must be as precise as possible.

Bruno Guillaumie (EMPA) responded that, as previously described by Ms Fouquet, the indicators and data are covered in the STECF's report, but an analysis was lacking, which translated into a lack of recommendations in the report.

Frangiscos Nikolian (DG MARE) informed that, the previous week, he attended the 2023 conference of the European Association of Fisheries Economists. Several discussions on improving reporting on economic sustainability, including under the biennial economic reports, took place. Mr Nikolian highlighted that several scientists were attempting to analyse the effectiveness of support from the European Maritime Fisheries and Aquaculture Fund in the aquaculture sector, which was a rather challenging exercise. He added that, once recommendations are available, the Commission services will analyse their feasibility with the STECF experts.

Christine Absil (Good Fish) highlighted that, in the context of the definition of sustainability criteria for the upcoming Sustainable Food System Framework, data will be needed on "global products".





Therefore, STECF had been analysing the available data. Ms Absil argued that the practicality of the indicators, particularly the availability of information across the world, must be considered.

*The Working Group agreed on the draft advice “inclusion of indicators of economic sustainability in the STECF’s “The EU aquaculture sector” report”.*

- **Way forward**

The Chair proposed to put forward the agreed advice to the Executive Committee for consideration and potential adoption. Once there was agreement from the AAC, the joint advice would be submitted to the Commission services.

### Brexit Adjustment Reserve

- **Presentation on expected impact on EU supply due to decommissioning schemes by Paul Thomas, EAPO**

Click [here](#) to access the presentation.

Paul Thomas (EAPO) stated that the purpose of the presentation was to explain the expected impact on EU supply of the decommissioning schemes. Mr Thomas emphasised that it was quite difficult to know the mentioned impact. According to the STECF’s 2021 Annual Economic Report on the Fishing Fleet, on the quota reductions attributable to the Trade and Cooperation Agreement with the UK for the EU in 2021, the most significant impacts are on pelagic species and in the North Sea and international waters. The EU’s fleet is expected to fish 38 thousand tonnes less in 2021, in contradiction with 73 thousand tonnes previously expected, meaning that there might have been compensation with fishing for other species not under quotas.

Mr Thomas explained that the most affected Member States were Denmark, France, Ireland, and the Netherlands, which together represent 80% of the impacts of Brexit. Besides the decommissioning schemes funded by the Brexit Adjustment Reserve, there are also temporary cessation schemes. He outlined the budgets and the expected quantity of decommissioned vessels. These are mainly demersal vessels. No pelagic vessel would be decommissioned. The Member State with the most decommissioned vessels would be France with 89 vessels, but the final list was still pending.

Mr Thomas presented estimated impacts. In the case of stocks under quota that were fully utilised (e.g., mackerel, cod, albacore tuna), these are expected to be remain fully utilised. A decrease of supply will not happen, because the other vessels will fish the quota. In the case of stocks not under quota, less volumes are expected to be fished. The vessels that usually fish these species will likely move towards higher value stocks under quota. In the case of stocks underutilised quota (e.g., anglerfish, haddock), it will depend on the breakdown of the quotas. Under these schemes, once the vessel is decommissioned, the quota can be divided among the Producer Organisations and the Member State’s reserve or the quota is placed back on the market.



Mr Thomas highlighted that, besides impacts on the food supply, there are other socioeconomic impacts to be considered, for example on first buyers, auctions, shipbuilders, netters, ship maintenance and repairers, and coastal communities. The overall impact for these remains unknown.

- **Exchange of views**

Pim Visser (VisNed) highlighted that, in the case of the Netherlands, the reduction was connected to the beam trawl fleet, which was being reduced by 65%. This reduction translated into a reduction of the related infrastructures in the ports and auctions. The Brexit Adjustment Reserve only provided compensation to fishers, while no fund was made available to compensate for the other socioeconomic impacts. Mr Visser argued that, onshore, a reconstruction of fresh fish processors was needed. Prices were going up, while the number of auctions and of processors were reducing. There was also a reduction in the number of students interested in fisheries-related studies. This represented a complete collapse of the fisheries-related infrastructure, he added.

Norah Parke (KFO), concerning underutilised non quota stocks, stated that would not be the case for crab fisheries. In the recent period, whitefish vessels were increasingly showing interest in crab fisheries. Considering the difference in *métier*, there might be a need for significant training.

Patrick Murphy (IS&WFPO) highlighted that it was also necessary to analyse the capital loss. The fishing industry was being lost in parts of the coastal communities, translating into a loss of cultural heritage. Among the younger generation, there was little interest in joining the fishing industry. Fishing vessels were not even being passed on from fishers to their children.

Sean O'Donoghue (KFO) corrected that the 25% reduction would spread out across five years starting in 2021.

The Chair thanked Mr Thomas for the overview of the impact of the decommissioning schemes. The schemes target specific harbours, which might jeopardise the sector. As for the overall impact on onshore activities, the Chair agreed with Mr Visser that these sectors were poorly supported. Objective information was lacking, and the situation varied significantly across Member States.

Paul Thomas (EAPO), on the implementation of the decommissioning schemes, according to several EAPO members, certain access conditions were a concern, for example, if, in the five years after the funding, the fisher gets a penalty, there would be an obligation to return the funding. Therefore, if new decommissioning schemes were to be setup, the conditions should be easier to implement than the ones foreseen in the European Maritime Fisheries and Aquaculture Fund.

### Awareness and Role of Producer Organisations (POs)

- **Presentation of the “sea in the school”, “food custody” and “producer-consumer proximity labelling” projects financed under the Production and Marketing Plan by Nicolas Fernández Muñoz, OPP72 - Conil**

Click [here](#) to access the presentation.



Nicolas Fernández Muñoz (OPP72) explained that his Producer Organisation had an average production valued at 4.5 million € and worked with two ports in the South of Spain, Conil de la Frontera and La Línea. These are small-scale fisheries. The producers of La Línea have seven vessels that use gillnet, while the rest of their fleet is mainly focused primarily on shellfish, including octopus. The producers of Conil use a different type of gillnet with longline and fish octopus with line through a specific technique.

Mr Fernández emphasised that “food custody” was about the certification involving producers, especially with retailers, fishmongers, and restaurants. It is about certifying security. Consumers want to be sure that their food is safe, access traceability information, and know that the products are sustainable. His Producer Organisation is also guaranteeing transparency. Products under their brands is certified for sustainability, since producers are fighting against Illegal, Unregulated, Undocumented fishing. Even in the EU, there is an illegal market involving many tonnes of products. Food custody guarantees catch selectivity, food safety, and traceability across the entire supply chain.

Mr Fernández exemplified that, by using smartphones, it was possible to scan the QR codes on the tags and access the described information. The aim is to bring fishers closer to the final consumer, which provides an added value and better economic results. To differentiate their products, his Producer Organisation has a specific label, which identifies their products as being local ones. Without the identification, it would be possible for imported products to be sold as local ones.

Mr Fernández underscored that the role of fishmongers was key in Spain. The auctions in fish markets are in person and online. Participation is possible through a smartphone in the same conditions as those participating in person. The products are received on the same day or the day after. There is continuous work to limit logistical problems. The products of his Producer Organisation are sold across Spain and could be sold to other EU countries. If products are handled correctly, these will be in the best condition to compete in the market.

Mr Fernández outlined the different brands developed by his Producer Organisation and by the Federation of “Cofradías” of Fishers of Cadiz. These labels provide an added value in comparison with products, including similar products from nearby ports, from other fleets, and from other countries. These quality labels ensure identification and differentiation as well as food safety. He argued that fishers were an “endangered species”, due to a lack of generational renewal, reduced fish intake and consumption. If extractive fisheries disappear in the EU, then the only available option will be to import products. With the disappearance of fishers, there will be a loss of knowledge.

Mr Fernández drew attention to the project “sea in the school”. The aim is to increase knowledge of the sea and fishing and for children to know that fishers are proud of their profession, encouraging generational renewal. The project is also important to encourage fish consumption. He outlined several of the materials used with children in the 5-9 and 10-12 years old age groups, including the creation of a mascot and of games, the organisation of a cooking competition, and explanation of labels and consumer information. He showed several of the educational videos developed, which are broadcasted in local television stations.

- **Exchange of views**



The Chair congratulated Mr Fernández for the presentation, which provided relevant examples for activities across Member States concerning awareness raising among children. The Chair asked Mr Fernández to share the videos with other professionals, suggesting that these could be dubbed or subtitled for campaigns in other Member States.

Pim Visser (VisNed) drew attention to the Network of European Blue Schools initiative, which was quite active in Portugal and was growing in the Netherlands. Mr Visser congratulated Mr Fernández on the initiative, suggesting that it could be complementary to the Blue Schools one.

Sean O'Donoghue (KFO) congratulated Mr Fernández for the excellent presentation. Mr O'Donoghue emphasised the need of increasing awareness on the role of Producer Organisations among a broader audience, not only amongst the membership of the MAC.

Juana María Parada Guinaldo (OR.PA.GU.) wanted to know about the information accessible via the QR code on the tag as well as the cost, plus the challenges involved.

Nicolas Fernández Muñoz (OPP72), in relation to the Chair's comments, recognised that there was a commonality of problems, so it was important for Producer Organisations to share their experiences and find common solutions. In relation to Mr Visser's intervention, Mr Fernández responded that he was not aware of the Network of European Blue Schools initiative, but expressed general concern about "blue" initiatives that actually presented fisheries as negative for the environment.

In relation to Mr O'Donoghue's intervention, Mr Fernández recognised that the members were already convinced about the relevance of Producer Organisations, but, nevertheless, members were not always aware of the initiatives undertaken. He emphasised the importance of sharing examples among members, plus of showing the examples to Commission representatives.

In relation to Ms Parada's questions, Mr Fernández responded that the yellow tags were quite expensive. His organisation is working to replace that tag with a biodegradable label, which might involve an even greater cost. He emphasised that the tags allowed for a price increase, which was maintained. The information provided by the QR code includes species, day of the auction, name of the shipping vessels, and sustainability information.

Christine Absil (Good Fish) expressed satisfaction with the implementation of labels that provide traceability and consumer information, plus to hear that there was an added value and profitability. In her experience, some national administrations questioned the added value of increased traceability, since, in their view, consumers were not looking for additional information. Ms Absil asked Mr Fernández to expand on his experience with consumers and the promotion involved, including potential studies.

Maria Luisa Álvarez Blanco (FEDEPESCA) congratulated Mr Fernández on the activities of his Producer Organisation. Mr Álvarez emphasised that the increased traceability was valued by fishmongers and by consumers. The seller can provide additional value to the product and the consumer can know more about fishing activities.



Patrick Murphy (IS&WFPO) expressed great satisfaction with the presentation, considering the Mr Fernández's initiative to be a good example against negative perceptions across the EU. Mr Murphy wanted to know more about the reaction of public authorities and of the Commission to the initiative. He commented that the quality label was a very positive example, which should be replicated. The nutritional value could also be added.

Sean O'Donoghue (KFO) expressed support for continuing to hold presentations in Working Group 1 meetings, but argued that it was important to raise awareness with a wider audience. Mr O'Donoghue encouraged members to provide suggestions on how to increase awareness on the initiatives.

Nicolas Fernández Muñoz (OPP72), in relation to Ms Absil's intervention, responded that there was clearly a demand for labelled products. These labels are also relevant in terms of food safety for restaurants. Mr Fernández recognised that it could be relevant to undertake a study on the matter.

In relation to Ms Álvarez's intervention, Mr Fernández emphasised that the "food custody" initiative aimed to increase procurement in fish markets across supply chains. In relation to Mr Murphy's intervention, he expressed interest in knowing the Commission's views. As for Mr O'Donoghue's intervention, he emphasised the relevance of sharing practices, while agreeing that it was also important to reach a wider audience, so that producers can be adequately valued.

Mariano García García (FACOPE) wondered about the impact on fisheries due to unfair competition from third countries. Mr García asked about the tools available to Producer Organisations to denounce unfair competition. In relation to transnational Producer Organisations, he commented that EU-level rules were lacking.

Francisco Nikolian (DG MARE) congratulated Mr Fernández on his work, expressing great satisfaction that the implementation of the Common Market Organisation Regulation facilitated such work. Mr Nikolian emphasised that these activities should be part of the Production and Marketing Plans and supported with EU funding. He underscored that the EU cares about fishers, which is why the necessary legal frameworks were put in place to ensure sustainable and profitable fisheries.

On the rules for transnational Producer Organisations, Mr Nikolian stated that the legal framework is in place, but Member States and Producer Organisations must set these up. The Commission remains available to provide support in the process. He recognised that there were logistical difficulties, but these could be surpassed.

On the data used in the QR codes, Mr Nikolian commented that these were an example of traceability, which was a very important element. In the previous week, political agreement was reached on the revision of the Fisheries Control Regulation. Traceability will be enhanced. There will be increased digitalisation.

Patrick Murphy (IS&WFPO) agreed with Mr Nikolian, but argued that difficulties remained with Member States. Mr Murphy encouraged the Commission to follow-up with Member States to ensure that the legal framework is adequately implemented.





The Chair congratulated Mr Fernández for the presentation. The Chair stated that, in a future opportunity, the MAC would have to consider the political agreement on the revision of the Fisheries Control Regulation. The Chair agreed that the activities should be promoted to wider audience.

### Joint MAC/NWWAC/NSAC Focus Group on Brown Crab

- **Update on latest meetings and upcoming work**

Click [here](#) to access the presentation.

Norah Parke (KFO) explained that, in total landings of brown crab, in 2019, was of 10.000 tonnes in live weight in the EU, corresponding to a value of 28 million €, and of 31.000 tonnes in the UK, corresponding to 31 million €. The vessels involve in the fishery include small inshore vessels and offshore vivier vessels. Brown crab is a non-quota species, which creates a unique fishery management challenge. The market consists of live and processed crab, which created a very specialised supply chain and global route to market – this developed from a very narrow live/fresh market based almost entirely in France several decades ago.

Ms Parke further explained the evolution of the fishery. From 2000 to 2010, it was largely a small vessels, inshore artisanal fishery constrained by weather conditions, with a distance from markets. A small number of dedicated vivier vessels, smaller than 15 meters, entered the fishery mostly in the Channel, but also in Northwestern Ireland. From 2010 to 2015, the less than 15 meters vivier vessels grew in number and expanded particularly on the Northwestern Ireland, Scotland, and North Sea. Irish operators were constrained by very low days at sea, which drove this fleet to move further from their home waters. During this period, the Asian markets began to open up. During both periods, the challenges of getting live crustaceans from remote fishing grounds to both European and Asian cities drove the development of sophisticated vivier vessels and airfreight transport. 2016 to 2023 has been a very challenging period for the industry, due to the increasing number of participating Member States, Brexit, the COVID-19 pandemic, the knock-on effects on the Asian supply and, most recently, the large drive for Offshore Renewable Energy.

Ms Parke explained actions taken in the past. Irish and UK industry formed an informal group to discuss and improve markets and were joined by their French colleagues in the 2000-2010 period. This informal group formed the basis of the ACRUNET project, an Interreg project that examined many of the same issues still of concern. ACRUNET produced valuable deliverables, such as the European Brown Crab Guide available in English, French, Spanish, and Portuguese. The project never reached consensus on crab management. In her view, all the ACRUNET deliverables could, and should, be republished and, if necessary, translated into further languages.

Ms Parke outlined the greatest challenges for brown crab identified by the Focus Group. First, on stock levels, the landings are decreasing, but it is unclear whether this is due to overfishing, climate change, or a new undiagnosed disease. There are significant data gaps. Second, there are possible negative impacts caused by open access to brown crab fisheries. This is connected to displaced industry moving towards the brown crab fishery. Third, cadmium levels in brown crab have frequently caused closure of Asian markets. The cadmium levels are due to the physiology of the animal, not to



pollution. Ireland recently received information from the Chinese authorities that, based on the results of a public consultation, the permitted levels of cadmium would be raised from 0.5 mg per Kg to 3mg per Kg. Fourth, there are doubts on whether disease levels increased or if it is more reporting. Fifth, there are questions on whether the development of Offshore Renewable Energy has a disproportionate effect on brown crab and those who depend on the fisheries. Sixth, it is unclear whether Marine Protected Areas are a threat of a safety net for brown crab.

Ms Parke commented on the available current management measures. There is a minimum landing size, which varies across countries. “Light” crab should be returned to the sea. This is a measure already undertaken by responsible crab fishers, as light crab is likely to die if added to a store box or a vivier tank and will cause many other crabs to die, plus light crab will return to condition quite quickly and can be caught when fit for market. Only whole crab should be landed. Currently, there are cases of crab de-clawed at sea and landed while the bodies may be used as whelk bait, which a difficult to monitor measure. On area and seasonal limits, there would be a need to be specific to a particular area and based on scientific evidence to justify. It would need to be monitored to measured what benefit, if any, results. On days and sea limits, these have the ability to drive efforts as the fleet will adapt to meet the criteria.

Ms Parke commented on why non-quota status has not worked for brown crab. It has meant that there are little to no constraints on increased effort. There is not the same ratio of size of vessels versus catch. A relatively small crabber can service several thousand pots or traps. Modern vivier crabbers as small as 12 meters have as much catching capacity as a 15 meters vivier vessels. Brown crab, and all crustacean species, have completely different lifecycles. For example, a brown crab goes through a cycle of shedding its exoskeleton to allow growth followed by a period of recovery. During this time, crabs should not be landed but returned to sea and, in a relatively short time, they will return to condition. There is no “closed season” to facilitate this life cycle, so attempting management as applied to finfish is not effective.

Ms Parke drew attention to the management measures that could work, in accordance with results from the May 2023 workshop organised by the Focus Group. On stock levels, it is known that landings are decreasing, but there are questions on whether it is due to overfishing, climate change or a new undiagnosed disease. There are doubts about the level of bycatch. The Focus Group will advise for further work for more detailed data. A report of STECF identified information gaps. There are questions on whether maximum economic yield could be an option. There are issues connected to the co-existence with Offshore Renewable Energy installations, including investigations in the North Sea being undertaken by the UK and the Netherlands. There are doubts concerning the possible effects of electric-magnetic fields on crustaceans. Furthermore, questions remain on cadmium issues for Asian markets, particularly on the management and whether the efforts are paying off.

Ms Parke informed that the Focus Group would compile advice for the European Commission in the following weeks. She encouraged members to send their input to her and to the responsible Secretariats.

- **Exchange of views**



Pim Visser (VisNed) wanted to know about the enforceability of potential voluntary arrangements. If management was to be developed by the Commission, it would likely take several years.

Norah Parke (KFO) recognised that it was a challenge, since it was possible for industry participants to agree on the appropriate actions, but that it would be difficult to enforce at national level. Ms Parke emphasised that communication and exchanges of information were essential. Better prices should be provided for good practices. Nevertheless, this would not prevent some operators from acting outside the voluntary agreements.

Pim Visser (VisNed) wondered about the relevance of including these agreements in the Production and Marketing Plans of the involved Producer Organisations, which could make these more enforceable.

Norah Parke (KFO) thanked Mr Visser for the suggestion, adding that she would discuss it with the Focus Group, so that it could be potentially followed-up more formally.

#### AOB

None.



### Summary of action points

- European Market Observatory for Fisheries and Aquaculture (EUMOFA):
  - Main interested members to develop feedback to narrow and prioritise the scope of the proposed study on the EU tuna sector
- Common Market Organisation:
  - Continue monitoring developments
- Scientific, Technical and Economic Committee for Fisheries (STECF):
  - Agreed draft advice to be put forward to the Executive Committee for consideration and potential adoption
  - Once joint agreement with the Aquaculture Advisory Council is reached, joint advice to be submitted to DG MARE
- Awareness and Role of Producer Organisations (POs):
  - Under the draft agenda of the next agenda, item on the topic to be included again, including additional presentation on projects financed by Production and Marketing Plans
- Joint MAC/NWWAC/NSAC Focus Group on Brown Crab:
  - If relevant, Chair of the Focus Group to be invited to provide a new update at the next meeting



## Attendance List

Representative	Organisation	Role
Aitana López Baquero	Spain	Observer
Alen Lovrinov	Omega 3 Producers Organisation	Member
Alessandro Manghisi	Marine Stewardship Council (MSC)	Member
Alexandra Philippe	Market Advisory Council (MAC)	Secretariat
Anna Rokicka	Polish Association of Fish Processors (PSPR)	Member
Anne-France Mattlet	Europêche	Member
Arthur Yon	FROM Nord	Member
Bruno Guillaumie	European Molluscs' Producers Association (EMPA)	Member
Cécile Fouquet	Aquaculture Advisory Council	Observer
Christine Absil	Good Fish Foundation	Member
Christophe Vande Weyer	European Commission	Member
Daniel Voces	Europêche	Member
Emiel Brouckaert	European Association of Fish Producers Organisations (EAPO)	Member
Frangiscos Nikolian	European Commission	Expert
Gaëtane Le Breuil	European Fishmeal	Member
Garazi Rodríguez	APROMAR	Member
Isabel Mariño Prieto	Asociación Española de Mayoristas, Importadores, Transformadores y Exportadores de Productos de la Pesca y Acuicultura (CONXEMAR)	Member
Jaroslaw Zieliński	Polish Fish Producers Association (PFPA)	Member
Javier Ojeda	Federation of European Aquaculture Producers (FEAP)	Member
Jean-Marie Robert	Les Pêcheurs de Bretagne	Member
Jérémie Souben	FEDOPA	Member
José Basilio Otero	Federación Nacional de Cofradías de Pescadores	Member
José Carlos Escalera	Federación de Cofradías de Pescadores de Cadiz	Member
Juana Maria Parada Guinaldo	OR.PA.GU.	Member





Representative	Organisation	Role
Julien Lamothe	European Association of Fish Producers Organisations (EAPO)	Chair
Katarina Sipic	EU Fish Processors and Traders Association (AIPCE) / European Federation of National Organizations of Importers and Exporters of Fish (CEP)	Member
Laure Guillevic	WWF	Member
Laurène Jolly	European Commission	Expert
María Luisa Álvarez Blanco	Federación de Asociaciones Provinciales de Empresarios Detallistas de Pescados y Productos Congelados (FEDEPESCA)	Member
Mariano García García	Federación Andaluza de Cofradías de Pescadores (FACOPE)	Member
Marine Cusa	Oceana	Member
Massimo Bellavista	Copa Cogeca	Member
Miguel Lizaso	European Commission	Expert
Nicolás Fernández Muñoz	OPP72	Member
Norah Parke	Killybegs Fishermen's Organisation (KFO)	Member
Patrick Murphy	Irish South & West Fish Producers Organisation (IS&WFPO)	Member
Paul Thomas	European Association of Fish Producers Organisations (EAPO)	Member
Pedro Luis Casado López	Asociación de Armadores Punta del Moral (OPP80)	Member
Pedro Reis Santos	Market Advisory Council (MAC)	Secretariat
Pierre Commère	Association Des Entreprises de Produits ALimentaires Élaborés (ADEPALE)	Member
Pim Visser	VisNed	Member
Rosalie Tukker	Europêche	Member
Sean O'Donoghue	Killybegs Fishermen's Organisation (KFO)	Member
Thomas Kruse	Danish Pelagic Producers Organisation (DPPO) / Danish Fishermen P.O.	Member
Vanya Vulperhorst	Oceana	Member
Xavier Pires	ALIF	Member
Yobana Bermúdez	EU Fish Processors and Traders Association (AIPCE)	Member

