

## Working Group 2: EU Markets

### Minutes

Wednesday, 29 November 2023 (09:30 – 13:00 CET)

Zoom

Interpretation in EN, ES, FR

#### Welcome from the Chair, Pierre Commère

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

**Adoption of draft agenda and of the last meeting minutes (19.09.23):** adopted

#### Action points of the last meeting

- **State-of-play of the decisions made during the last meeting - information**
- **Banning Forced Labour:**
  - Draft advice to be considered via an ordinary written procedure of two weeks
    - 1<sup>st</sup> WG2 written procedure: 21 September – 6 October 2023 | Feedback from Europêche, EJF and EuroCommerce
    - 2<sup>nd</sup> WG2 written procedure: 30 October – 14 November 2023
    - ExCom written procedure: 15 November – 29 November 2023

#### Trade Agreements & Trade Policy Instruments

- **Update on latest trade developments by Céline Idil and Kinga Malinowska-Facci (DG MARE), including:**
  - Australia
  - ASEAN (Thailand)
  - European Economic Area (Norway, Iceland)
  - Mercosur
  - Morocco

Besides the previously identified regions and countries, the Chair asked the Commission representatives to also provide an update on the negotiation of the EU-New Zealand Free Trade Agreement and the Brazilian action plan to meet DG SANTE's requirements for exports of fishery products.

Céline Idil (DG MARE) delivered an update on various EU-third country trade developments. Ms Idil highlighted that, while DG MARE was involved, negotiations were led by DG TRADE.

Regarding **Australia**, Ms Idil mentioned that 15 rounds of negotiations had been organised and that the main issues tabled did not regard fisheries. Ms Idil explained that negotiations had now ended



and that the agreement foresaw a complete liberalisation of fish products with the usual origin rules. However, there was a blockage regarding agriculture matters, meaning that negotiations had ended in a stalemate. She expressed that there was a will to move forward, but that things were quite complex when it came to agriculture. Without political willpower, there was no way a final agreement could be reached.

Ms Idil went on to explain that, in the **Mercosur** negotiations, deforestation was the main concern of the EU. The Commission representative mentioned that Mercosur had come back with positive news on addressing this issue and expressed hope that the blockage in negotiations would be overcome. As this issue was closely tied to the political landscape, Ms Idil highlighted that the Commission was closely following the impacts the recent elections in Argentina could have on the negotiation process. So far it seemed that, despite opposing political views by the new Argentinian president, he was favourable to trade liberalisation. A technical conclusion on the trade items had been reached. Ms Idil added that, nevertheless, partly due to Belgium and France voicing concerns over exports from Mercosur, developments were moving forward slowly.

Concerning **Brazil**, Ms Idil mentioned that the EU imposed an import ban due to sanitary issues. DG SANTE, who is in charge of the file, sent comments to the Brazilian authorities on their action plan addressing some sanitation concerns the Commission raised. Brazilian reply still awaited.

Ms Idil explained that negotiations with **Thailand** were relaunched in March 2023. The next rounds of negotiations would take place in January 2024. The Commission representative stated that specific rules pertaining to products had not yet been discussed and that the first rounds of negotiations focussed on setting up common principles around non-discrimination and the coverage of exports. Achieving these was the priority for both DG MARE and DG TRADE. Ms Idil highlighted that DG MARE had been in contact with some fisheries value chain actors in Thailand to address sensitivities around canned tuna. She expressed that the Commission was interested in understanding the concerns for other fisheries products too.

Ms Idil informed that the EU is in the middle of negotiations with **Norway and Iceland (EEA)**. The protocol establishing tariff quotas for fisheries products between the EU and the EEA expired in 2021 and was being renegotiated. Negotiations with the EEA are taking much longer than foreseen, with fisheries issues and contributions to the EU budget emerging as hurdles. Ms Idil stated that, as negotiations are coming to an end, the temporary autonomous tariff quotas implemented in 2021 had to be removed. This is because the quotas are supposed to be granted in exchange for the financial contribution to the EU budget. The products impacted, such as herring, have been put back into the offer made in the framework of the negotiations. Ms Idil underlined that the new ATQ regulation had been adopted without herring quotas. Furthermore, she highlighted that the Commission was strongly negotiating access to waters, and underlined that DG MARE strongly supports the interests of EU fleets and processing industries. Ms Idil concluded saying that an overall final agreement had not yet been reached, but that she was hopeful developments would move on quickly.



Concerning the Free Trade Agreement between the EU and **New Zealand**, Ms Idil recalled that agreement had been reached in July 2023 and that the European Parliament had given its approval of the agreement in November 2023.

Kinga Malinowska-Facci (DG MARE) added that this new generation agreement with New Zealand is not a mixed agreement but an 'EU-only' agreement. This means that the EU Member States are not party to the agreement and ratification by the Member States is not necessary. Once the EU institutions (European Parliament and Council) and the New Zealand counterpart sign off on it, the agreement can come into force.

- **Exchange of views**

The Chair, concerning Australia, expressed willingness to know more about the underlying reasons for the blockage in the negotiations.

Céline Idil (DG MARE) responded that it related to exports of agricultural products from Australia to the EU market.

The Chair, concerning Thailand, asked what the focus of the negotiations taking place in January 2024 would be and whether negotiations would be extended to include other ASEAN countries.

Céline Idil (DG MARE) clarified that products would be the focus of the next negotiations. Ms Idil went on to state that she was not sure whether negotiations were planned with other ASEAN countries. However, she mentioned that separate bilateral discussions are foreseen with ASEAN countries with whom the EU does not share the same political ideologies.

Felicidad Fernández (ANFACO-CECOPECA) asked whether the January 2024 negotiations would include talks around offers and products, and whether derogations would be tabled. Ms Fernández emphasised that her association supports a derogation to exclude tuna products from the EU-Thailand negotiations.

Céline Idil (DG MARE) explained that discussions about products would start but that talks about offers and derogations would most likely not take place in the January round.

Kinga Malinowska-Facci (DG TRADE) clarified that exchange of offers would rather be discussed in the planned March 2024 round. Regarding tuna, both Commission representatives expressed that they did not know how the topic would be tackled.

Patrick Murphy (IS&WFPO) asked whether agreements had already been reached between the EU and Thailand on harmonising and standardising labelling and labour conditions.

Céline Idil (DG MARE) stated that, so far, no agreements had been reached. She underlined that, while sustainability criteria exist in both the EU and Thailand, the Commission was still exploring the overlap between those in the EU and those in Thailand. As far as addressing labelling, Ms Idil highlighted that, generally, Free Trade Agreements (FTAs) do not directly cover these.



Patrick Murphy (IS&WFPO) continued his intervention by asking whether health standard regulations would be discussed in the negotiations too. Mr Murphy underscored the importance of creating a level-playing-field.

Céline Idil (DG MARE) explained that basic standards around sanitation exist and are applied to all imports. She underlined that these standards were non-negotiable and never touched in discussions with third countries – in that sense, a level-playing-field exists. However, Ms Idil expressed that EU-internal labour standards could not be imposed on imports. Nevertheless, to facilitate the creation of a level-playing-field in this regard, sustainability criteria and labour standards were always negotiated.

The Chair, concerning the EEA Agreement, highlighted the complexities of the negotiations between the EU and EEA and expressed interest in following further developments.

Paul Thomas (EAPO) explained that it is complicated, as producers, to understand all the technical aspects of negotiations. On behalf of EAPO, he expressed keen interest in having a technical meeting with the Commission to discuss these issues.

Guus Pastoor (Visfederatie) agreed with Mr Thomas that the technical aspects of negotiations were complex and stated that he thought it wise to have a more elaborate discussion on the topic at some point. Mr Pastoor went on to express that, while he understands that making trade-offs between interests makes negotiations difficult, he thought the Commission had difficulty balancing things. He stated that there seemed to be a basic misunderstanding of what production is and explained that, in the EU, production is both primary and secondary – as opposed to just primary. Mr Pastoor underlined that statistics show that EU primary productions had gone down and that, if that be the case, food security cannot be provided by these, and that secondary productions (EU Processing) are a need to EU Food security. He concluded his intervention by underlining the importance of ensuring that import standards follow EU standards and stated that stakeholders should help make talks the Commission holds with third countries easier by providing a balanced view.

Poul Melgaard Jensen (Danish Seafood Association) asked whether, if the EEA do not present a workable agreement, the Commission would be willing to consider making a compensatory autonomous tariff quota (ATQ).

Céline Idil (DG MARE) stressed that it was important to strike a balance between the processing industry and fishers in allocating ATQs. The only exclusions that could be made in allocating ATQs, for political reasons, were Russia and Belarus. She explained that, regarding compensations for Danish fleets, everything was still on the table and that Danish interests were not forgotten.

Jarek Zielinski (PFPA) stated that the extension of the EU market to include Norway took place in 2004, at the same time that Poland joined the EU. He underlined that Member States joining the bloc at the time were not beneficiaries of any agreements. Mr Zielinski went on asking how the Commission would ensure that the affected Member States would benefit from new agreements and that access to EEA waters would be guaranteed.



Céline Idil (DG MARE) mentioned that quotas allocated and agreements made before the accession of Member States in 2004 were adapted. She highlighted that Poland is one of the biggest users of ATQs. Regarding access to waters, Ms Idil stressed that she could not further elaborate but that all Member States are treated equally.

Jacopo Pasquero (Conxemar), concerning Mercosur, mentioned that, as far as he was aware, an instrument was developed to tackle deforestation. Mr Pasquero wondered if these instruments would have an impact on other sectors, such as fisheries.

Céline Idil (DG MARE) stated that DG MARE could communicate on this in writing after having discussions with DG TRADE.

The Chair suggested for the issue to be addressed again in the January or March 2024 meetings. .

- **Way forward**

The Chair proposed to postpone the discussions about Morocco to the January 2024 meeting. Additionally, the Chair proposed the circulation of a questionnaire to the members by the Secretariat on the ongoing negotiations of the EU-Thailand Free Trade Agreement, which could serve as basis for the drafting of advice on the topic.

### IUU Regulation (Catch Documentation Scheme)

- **Presentation on modifications in the context of the agreement on the legislative revision of the fisheries control system by Desiree Kjolsen (DG MARE)**

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

Desiree Kjolsen (DG MARE) presented the revision of the EU fisheries control system<sup>1</sup>. The new Regulation, which partly aims to reinforce the fight against Illegal, Unreported, and Unregulated (IUU) fishing, will be published in December 2023 and enter into force in January 2024.

Article 4 in the new Regulation will amend the existing IUU Regulation. Ms Kjolsen explained that this Regulation had not been subject to a comprehensive. The main newly adopted measures include: 1) the establishment of a legal basis for the mandatory use of an IT system called CATCH; 2) punctual changes to the content of the catch certification documents to ensure the functioning of CATCH and improved traceability; 3) strengthened measures against countries listed as non-cooperating in the fight against IUU fishing; and 4) the moving of enforcement and procedures to the Control Regulation.

With the amendment of Chapter VI Article 38, the rules around ownership of vessels flying non-cooperating country flags have been tightened. Ms Kjolsen underlined that there is now an obligation for EU owners to request these vessels be removed from the fleet registry. Furthermore, these vessels will no longer be able to access port services in the EU.

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<sup>1</sup>[https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L\\_202302842](https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L_202302842)





Ms Kjolsen went on elaborating on the CATCH IT system and underlined that new revised catch certificates will need to be submitted through the CATCH IT as of 2026. Old catch certificates generated and validated before 2026 will still be admissible for an additional 24 months from date of application, if submitted through CATCH. Ms Kjolsen highlighted that Article 12 in the proposal introduces the system, its data use aspects, and the way it functions. The use of CATCH will be compulsory for EU importers to all Member States (by the beginning of 2026). She noted that third country exporters are not obliged to use the system. However, the Commission will strongly encourage them to do so.

Access to the CATCH system will be granted to notified central competent authorities in Member States and third countries. These authorities will have the power to grant access to the system to economic operators under their jurisdiction. The principle is: the Commission interacts with national authorities, and national authorities interact with their operators. Ms Kjolsen underlined that, while the system is still being developed, it is already accessible to Member States and EU importers. DG TAXUD is being consulted on the connection of CATCH to the EU customs systems (CERTEX), which will become compulsory in 2028. CATCH is already integrated into the Trade Control and Expert System New Technology (TRACES NT) platform.

The Commission expects that, through the CATCH IT system, Member State authorities will have a more homogenous control procedure and a decreased administrative burden. Furthermore, CATCH is expected to lead to a reduction of fraudulent catch certificates. Ms Kjolsen explained that the Commission is providing training to Member State authorities on how to use the system and that, for third countries, regional and bilateral explanatory sessions will be organised.

Ms Kjolsen continued her presentation by highlighting the amendments made to Annex II within the new proposal. She explained that the changes pertained to 1) the issuing of unique IMO/UVI numbers for vessels; 2) the reformulation of weight boxes to ensure data consistency in quantity management; 3) the identification of more precise fishing areas; and 4) the revision of transshipment/landing and importer declarations. Furthermore, Ms Kjolsen mentioned that, to facilitate the development of a more transparent value chain, a processing statement will be required in the future, even in cases where the related processing takes place in the same country of the flag of the fishing vessel. The information required in such a processing statement has also been amended slightly – each statement will require a unique statement number that can be clearly linked to the affiliated catch certificate(s).

Regarding amendments to indirect imports without processing, Ms Kjolsen outlined that the Commission was developing a template for a non-manipulation document. Work was also being done to identify the competent authorities in each Member State to sign off on the reports.

Ms Kjolsen concluded her presentation by underlining that the Commission plans to also revise the Implementing Regulation 1010/2009 to ensure that all provisions necessary for the correct functioning of CATCH are developed.

- **Exchange of views**

Patrick Murphy (IS&WFPO) expressed concerns about the lacking amount of engagement between stakeholders and the Commission on this issue. He went on to ask whether the new catch certificates



would replace anything or just modify the existing electronic logbook systems, as well as how CATCH data could be accessed and by whom.

Desiree Kjolsen (DG MARE) explained that the revised catch certificates and the use of CATCH would only replace old catch certificates, not e-logbooks. She went on to underline that designated individuals within the importer country's competent authority would have access to the catch certificate and that the Commission would not have access. Finally, Ms Kjolsen mentioned that, essentially, the process and structure were the same as before, just in digital format instead of on paper.

Julien Lamothe (ANOP) asked whether the CATCH system would be used for exports too.

Desiree Kjolsen (DG MARE) stated that the creation of catch certificates for exports is possible in CATCH. However, the main focus will initially be on imports.

The Chair urged members to talk to their national authorities to ensure that they understand the CATCH system.

- **Way forward**

The Chair proposed the scheduling of another exchange with Commission representatives at a next meeting to focus on the practical difficulties faced by operators.

### Food and Agriculture Organisation (FAO)

- **Presentation on the main topics and outcomes of the 11-15 September 2023 Sub-Committee on Fish Trade meeting by Márcio Castro de Souza, FAO**

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

Márcio Castro de Souza (FAO) provided a general overview of the FAO's Committee on Fisheries (COFI) and presented the outcomes from and activities undertaken at the last FAO Sub-Committee on Fish Trade (COFI:FT) meeting. He started by highlighting that, over the last couple of years, the FAO has been doing considerable work on their "Blue Transformation Roadmap". This roadmap covers three areas: aquaculture, fisheries, and value chains. The COFI, within the FAO, tackles all three areas through its sub-committees. These are: the Sub-Committee on Fish Trade, the Sub-Committee on Aquaculture (COFI:AQ), and the newly established Sub-Committee on Fisheries Management (COFI:FM).

The last Sub-Committee on Fish Trade meeting took place in September 2023. It was the first meeting to which other organisations were invited to present their work in colloquia. Mr Castro de Souza explained that at this meeting, 11 Working Documents were discussed. They covered the following themes: 1) Fisheries outlook, global themes, and cooperation with other international organisations; 2) Market access and 3) Code of Conduct for Responsible Fisheries (CCRF) and post-harvest elements. The next COFI:FT meeting is set for 2025.

Mr Castro de Souza outlined in more detail what was discussed in the last COFI:FT meeting around social responsibility, small-scale fisheries (SSF), post-harvest issues, IUU fishing, trade agreements,



and the continuation and recognition of FAO work. He underlined that all documents from the meeting were available online.

Regarding social responsibility, Mr Castro de Souza explained that the FAO was producing guidance to help ensure compliance with overall instruments on human rights, labour rights, and other social responsibility issues in fisheries and aquaculture value chains. He stated that, so far, the FAO had drafted the first part of the guidance document that addresses industrial fishing. This part of the document is now under consultation with countries. He stated that the final document will be broken down into six parts that address the entire value chain. The guide will be formally presented at the COFI:FT meeting in 2025.

Mr Castro de Souza went on highlighting that the integration of SSF into international markets was being addressed. He stated that the FAO had received some figures from significant countries, that represent the overall scenario well, on the number of SSF fleets involved in international trade. Mr Castro de Souza went on to explain that, while SSF make up an important part of the international trade dimension, the figures received indicate that the benefits accrued for these fleets through international trade are limited. He exclaimed that there is a need to make SSF products more competitive.

Mr Castro de Souza then elaborated on the revised CCRF questionnaire that had been sent to members. He stated that consultations with FAO members on post-harvest issues are still ongoing and underlined that the FAO is revisiting some questions to ease with their understanding and increase response rates.

Mr Castro de Souza went on to highlight that the FAO has produced a Working Document on the economic effects of IUU fishing. He stressed that it was important to apply and perform different approaches and analyses for the IUU problem and stated that FAO members had asked specifically for a trade analysis.

On trade agreements, Mr Castro de Souza explained that FAO members had requested the creation of a database encompassing non-traditional clauses of trade agreements involving fisheries and aquaculture. The FAO has committed to building this database.

Mr Castro de Souza went on underlining that FAO would continue to work on issues of food safety, traceability, and aquatic food utilisation. He closed off his presentation by highlighting the dates for upcoming COFI and Sub-Committee sessions. The next Sub-Committee on Fisheries Management meeting will take place between 15 and 18 January 2024. The next COFI meeting will take place between 8 and 12 July 2024.

- **Exchange of views**

The Chair expressed satisfaction that the FAO would conduct an updated analysis of IUU fishing impacts on trade, and highlighted that this analysis was very relevant. He mentioned that, usually, old data on the topic was used, meaning that stakeholders did not get a very accurate picture of what was actually going on.





Bruno Guillaumie (EMPA) commented that it seemed as if algae and molluscs had been omitted from the discussion so far, considering the official titles of the Sub-Committees. He asked whether FAO was only interested in fish products or whether algae and molluscs were also within the scope of its interests.

Márcio Castro de Souza (FAO) explained that, within the FAO, there is a group of people devoted to algae and that more country requests are coming in to conduct more studies on algae specifically. He stated it was more difficult to place topics such as algae, within the Sub-Committees, as association with a specific one was blurred. Nonetheless, for both the topics of algae and molluscs, FAO has committed to collecting more data.

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

- **Presentation of “The EU Fish Market” 2023 report by Valentina Sannino (EUMOFA)**

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

Valentina Sannino (EUMOFA) presented the 2023 edition of “The EU Fish Market” report. She explained that EUMOFA, partly through reports like the one mentioned above, aims to provide an overview of EU level production and flows of fish. The “EU Fish Market” report, specifically, aims at providing a description of the whole European fisheries and aquaculture industry. The data used in the report comes from consolidated figures and is based on information from 2021 (in the case of production) and 2022.

Ms Sannino highlighted particularly interesting points raised in the report. The report found, she mentioned, that a number of factors (inflation, euro exchange rate volatility, marine fuel prices) had significantly impacted fish prices and trade flows. This contributed to a decrease in the volumes of at-home fish consumption and imports for the year 2022. For production, on the other hand, 2021 was a year of growth – with increased farmed production partially compensating for decreased catches.

Ms Sannino went on to explain that the EU’s trade in fisheries and aquaculture products in 2022 was second only to China (both in value and in volume). The main EU imports included: salmon, cod, Alaska pollock, fishmeal, tuna, and shrimp. The main EU exports were: herring, mackerel, blue whiting, tuna, fishmeal and fish oil.

Based on EUMOFA’s EU supply balance sheet, Ms Sannino outlined, the EU supply for human consumption was 12.92 million tonnes live weight equivalent (LWE) in 2021. She highlighted that, although the 2021 EU’s self-sufficiency estimate was at its lowest in 2021, the bloc was still able to maintain high levels of apparent seafood consumption, mainly by sourcing from imports. The top consumed species within the EU in 2021 were tuna, salmon, and cod. Ms Sannino noted that this per-capita consumption data was based on estimates due to data gaps in some countries.

About 2022 EU consumption through foodservice and retail sales, Ms Sannino explained that Germany was the country consuming the highest amount of processed fish products (at 28% of total EU volume), followed by Spain, Italy, and France. However, on a per-capita basis, consumption was a lot more diversified. Ms Sannino went on highlighting that, in the top-5 EU countries in terms of fish consumption (Spain, France, Italy, Germany and Poland) plus in the UK, the sales of unprocessed



products in the retail sector registered a 4% average decrease from 2021 to 2022. However, when it comes to the foodservice sector, the recovery that had begun in 2021 after the first waves of the COVID-19 pandemic continued also in 2022. Importantly, new data suggests that foodservice sales are recovering to pre-pandemic levels.

Moving on to EU imports and exports on fisheries and aquaculture products, Ms Sannino highlighted that both import and export values had increased. She mentioned that intra-EU trade was mostly composed of the re-exportation of products. Addressing EU-27 landings and aquaculture production, Ms Sannino underlined that in 2021, fisheries landings had decreased in volume but increased in value, and that for aquaculture, both volume and value had increased.

Finally, Ms Sannino underlined that all country profiles had been updated and were available online on the EUMOFA website.

- **Exchange of views**

María Luisa Álvarez (FEDEPESCA) drew attention to the issue of inflation. In Spain, fishery and aquaculture, for 18 months, were below the inflation rate of other food products, which could be due to increases in costs not being passed onto the consumer. Ms Álvarez expressed concern about the growing impression that fish products were expensive, leading to a replacement of a healthy protein. She added that it would be interesting to assess the costs of fishery and aquaculture products vs of other food products for the same period.

Valentina Sannino (EUMOFA) explained that the data used to state that consumer prices in the EU have been increasing since 2018 and up to May 2023 were taken from Eurostat.

Bruno Guillaume (EMPA) expressed concern that the report makes it difficult to assess the profitability of specific aquaculture products. He mentioned that it would be worth highlighting the profitability of each line of products, particularly for operators to better understand where to invest.

Valentina Sannino (EUMOFA) mentioned that the feasibility of this could be discussed with DG MARE. However, she highlighted, the aim of the report is to provide an overview of fishery and aquaculture products and not go into too much granular detail.

The Chair had concerns about the reality of the figures presented on aquaculture products coming from China. He asked whether Ms Sannino had any more information on the products being produced in China. He went on to comment on the inclusion of tuna in the self-sufficiency analysis, mentioning that the re-importation of tuna products meant that the figure presented would need to be corrected. There should be a note in the report highlighting these specificities.

Valentina Sannino (EUMOFA) stated that the data used in the report about Chinese production came from the FAO. She went on to explain that EUMOFA uses the production figures that are available and that these are difficult to assess. Regarding self-sufficiency, Ms Sannino highlighted that there is a need to provide more clarification on products that are impacted by the weakness of available statistics and hide the actual phenomena. Figures from Netherlands and Denmark, for example, show that they are importing mainly for the EU-27 bloc: this is because they hold the main import hubs within the EU and distribute to other Member States.



María Luisa Álvarez (FEDEPESCA) expressed concerns for the downward trend of fish consumption in Spain. There had been a 30% decrease in consumption. The 10% increase in the price of fishery products was not as much as the increase in other food products.

Christophe Vande Weyer (DG MARE) explained that the Commission was paying special attention to consumption behaviours and looking into any replacement effects.

Paul Thomas (EAPO) mentioned that there has been a big change in production and imports into the EU due to Brexit. He asked Ms Sannino whether and how this had been included in any analyses. Mr Thomas also highlighted that Brexit led to changes and redistributions in fishing quotas.

Valentina Sannino (EUMOFA) stated that, following Brexit, all historic data was amended to exclude the UK. She went on to underline that this meant all new analyses can be compared adequately.

### EU Market Supply

- **Presentation of “AIPCE Finfish Study 2023” by Poul Melgaard Jensen, Danish Seafood Association**

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

Poul Melgaard (Danish Seafood Association) presented the results of the “AIPCE Finfish Study 2023”<sup>2</sup>. He first highlighted several of the EU processing industry’s key figures, mentioning that the sector has an approximately 35 billion Euro turnover, encompasses approximately 4000 companies, and employs around 130,000 people directly. Mr Melgaard underlined that the processing industry in the EU was heavily dependent on imports.

In line with this, Mr Melgaard explained, the aim of the “AIPCE Finfish Study 2023” was to demonstrate that imports are necessary for the processing industry in Europe to contribute to the added value of EU seafood. Through the use of infographics, the report highlights the EU supply and import dependence of various fishery and aquaculture products. Furthermore, Mr Melgaard underlined, the study aimed to provide data to qualify the processing industry’s position on EU policies, such as ATQs, FTAs, and on IUU.

Mr Melgaard highlighted that Russia and Belarus are now excluded from ATQs, and that the exclusion of Russia had impacted EU imports of specific species, such as whitefish. However, with third countries, such as China still importing fish from Russia and exporting it to Europe, it is likely that some fish of Russian origin will still make its way to Europe. Mr Melgaard outlined that if it is assumed that currently 95% of all Alaska pollock fillets imported from China are of Russian origin, then around 70% of the fillets in EU markets have Russian origin. Therefore, the exclusion of Russia and Belarus from the benefit of ATQ’s as of 1st January 2024 will have consequences.

Mr Melgaard underscored the importance of FTAs and mentioned that many sourcing countries that the EU processing industry relies on do not currently have FTAs. He highlighted that consumer trends showed that, in 2022 and 2023, consumers were moving to more affordable species and other

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<sup>2</sup> <https://www.aipce-cep.org/wp-content/uploads/2023/10/Final-draft-Finfish-Study-2023.pdf>



sources of protein. He stated, therefore, that his organisation advocated for duty free imports on specific species, which could lower the costs for consumers.

Showcasing the import trends, import dependence, and EU supply of some species, such as cod, shrimp, and whitefish, Mr Melgaard brought to the attention of the members that, for the year 2022, the total market supply of fishery and aquaculture products in the EU dropped slightly from 2021, that landings had dropped below 3 million tonnes, and that the total supply for consumption hovered around 10 million tonnes.

**AOB**

None.



### Summary of action points

- Trade Agreements & Trade Policy Instruments:
  - Exchange of views with Commission representatives about trade developments to be scheduled for the January 2024 meeting.
  - Secretariat to circulate a questionnaire to the members on the ongoing negotiations of the EU-Thailand Free Trade Agreement, which will serve as basis for the drafting of advice on the topic.
  
- IUU Regulation (Catch Documentation Scheme)
  - Exchange of views with Commission representatives about the practical implications of the implementation of the new catch documentation scheme to be scheduled for the January 2024 meeting.
  - Secretariat to send email to the members to collect input ahead of the exchange.





## Attendance List

Representative	Organisation	Role
Adien Simonet	Union du Mareyage Français (UMF)	Member
Alexandre Bonneau	SNCE	Member
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
Celine Idil	European Commission	Expert
Christine Absil	Good Fish	Member
Christophe Vande Weyer	European Commission	Expert
Cristina Laborda	Spain	Observer
Desiree Kjolsen	European Commission	Expert
Emiel Brouckaert	European Association of Fish Producers Organisations (EAPO)	Member
Felicidad Fernández	ANFACO-CECOPESCA	Member
Gaëtane Le Breuil	European Fishmeal	Member
Jacopo Pasquero	Conxemar	Member
Jaroslaw Zieliński	Polish Fish Producers Association (PFPA)	Member
Javier Barón	Spain	Observer
Jennifer Reeves	Marine Stewardship Council	Member
Jens Mathiesen	Danish Seafood Association	Member
Jérémie Souben	FEDOPA	Member
Julien Daudu	Environmental Justice Foundation (EJF)	Member
Julien Lamothe	Association Nationale des Organisations de Producteurs (ANOP)	Member
Kinga Malinowska-Facci	European Commission	Expert
Laurène Jolly	European Commission	Expert
Malgorzata Kieliszewska	Poland	Observer
Marcio Castro de Souza	Food and Agriculture Organization (FAO)	Expert



Representative	Organisation	Role
Marcus Breuer	European Parliament	Observer
Maria Gracia Cantarella	European Commission	Expert
María Luisa Alvaréz Blanco	Federación de Asociaciones Provinciales de Empresarios Detallistas de Pescados y Productos Congelados (FEDEPESCA)	Member
Marine Cusa	Oceana	Member
Massimo Bellavista	COPA COGECA	Member
Maximilian Schwarz	Market Advisory Council (MAC)	Secretariat
Miguel Lizaso	European Commission	Expert
Patrick Murphy	Irish South & West Fish Producers Organisation (IS&WFPO)	Member
Paul Thomas	European Association of Fish Producers Organisations (EAPO)	Member
Pedro Reis Santos	Market Advisory Council (MAC)	Secretariat
Pierre Commère	Association Des Entreprises de Produits Alimentaires Élaborés (ADEPALE)	Chair
Poul Melgaard Jensen	Danish Seafood Association	Member
Quentin Marchais	ClientEarth	Member
Ricardo Pelani	COPA COGECA	Member
Rosalie Tukker	Europêche	Member
Sean O'Donoghue	Killybegs Fishermen's Organisation (KFO)	Member
Sergio López García	OPP Burela	Member
Stefan Meyer	Bundesverband der deutschen Fischindustrie und des Fischgrosshandels e.V.	Member
Thomas Kruse	Danish Fishers PO / Danish Pelagic PO	Member
Tuure Eskelinen	EuroCommerce	Member
Valentina Sannino	EUMOFA	Expert
Vanya Vulperhorst	Oceana	Member
Yannis Pelekanakis	Federation of European Aquaculture Producers (FEAP)	Member

