

# Study on Common Market Organisation (CMO)

MAC  
29/01/2025

# Agenda

- Objectives and background
- General approach and timeline
- Data collection plan
- First results of the data collection
- Next steps



# Background

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**Reform of the CMO** in 2013, with in particular the reinforcement of the role of producer organisations (POs)

The reform is **generally assessed positively** in the implementation report of the CMO (2023)

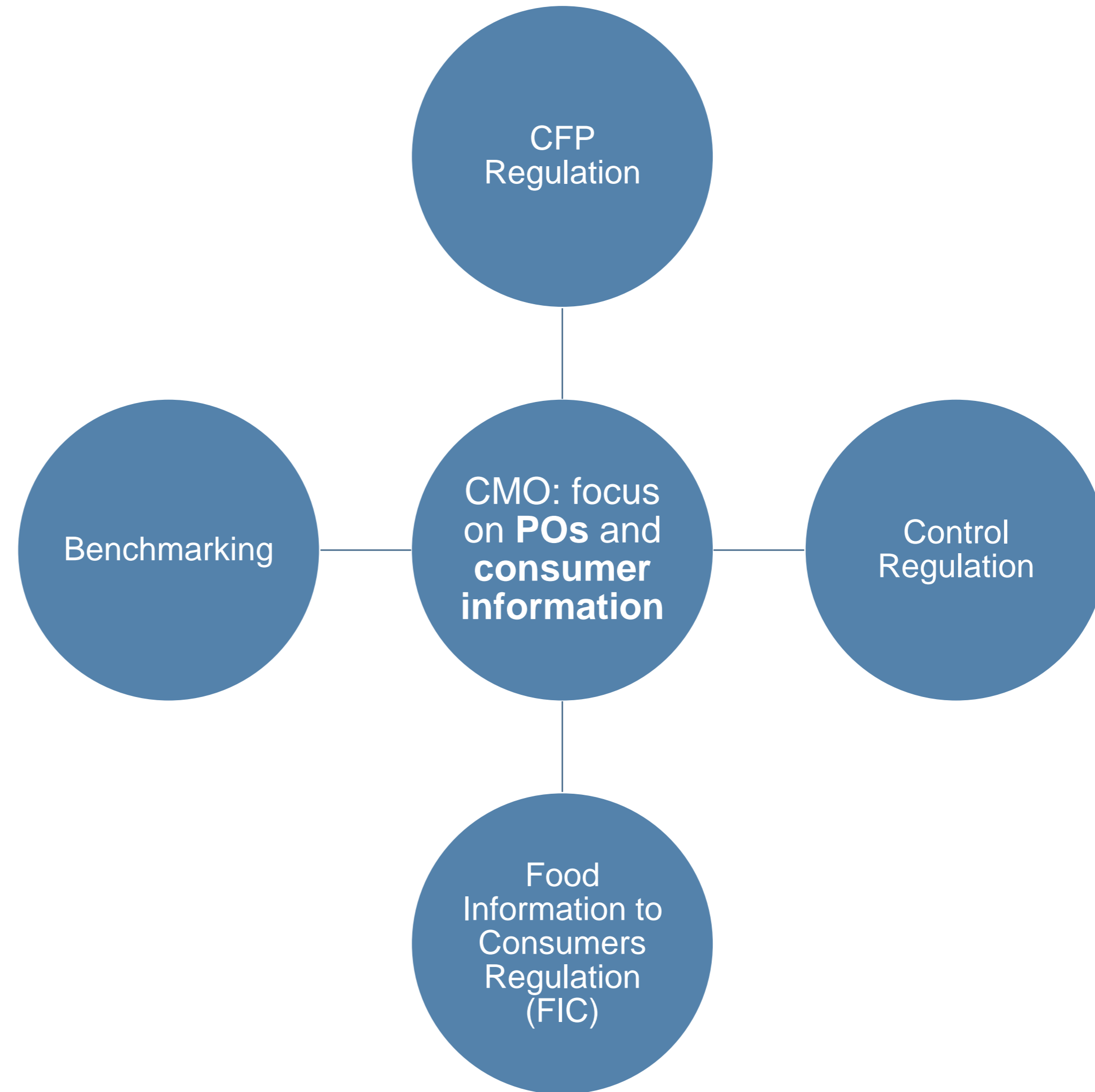
A few shortcomings identified on :

- **The recognition and functioning of POs**
- **The lack of compliance of information provisions to consumers**
- **The limited scope and effectiveness of mandatory requirements for consumer information**

# Objectives and scope

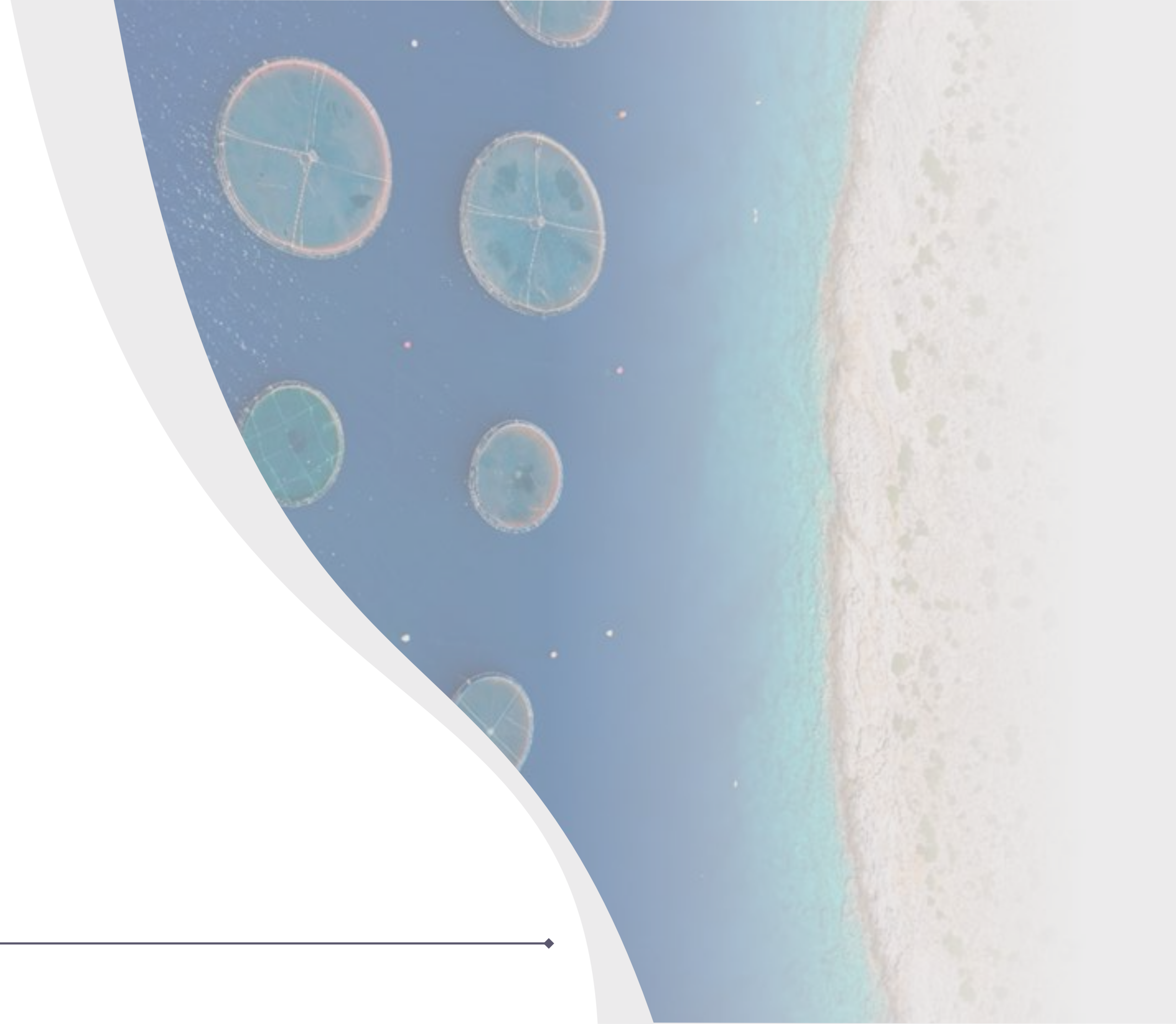
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- Feed into the **ongoing CFP evaluation**
- Provide **concrete and applicable recommendations** / identified best practices
- Identify **possible improvements to the CMO Regulation**

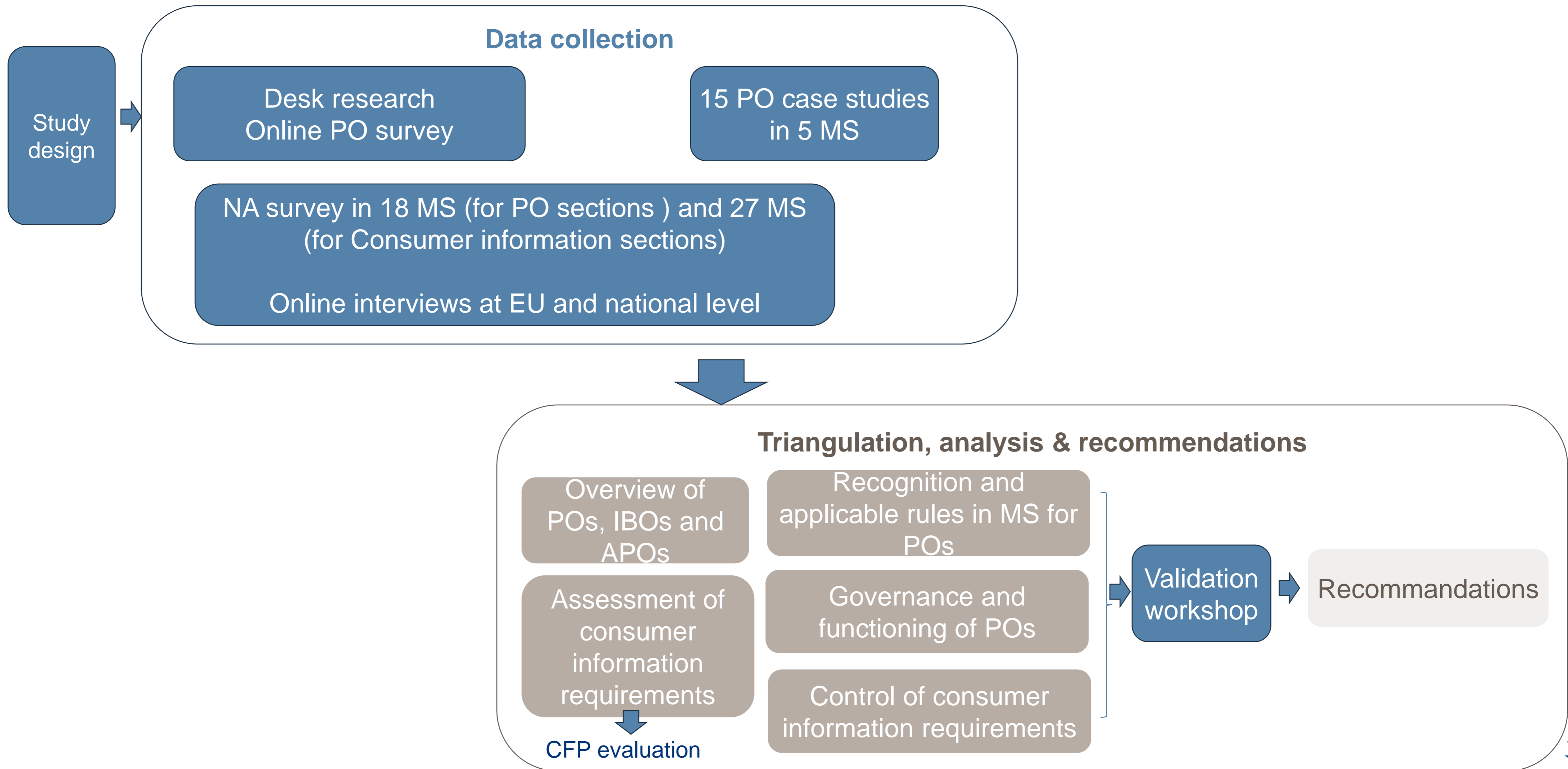


# Overview of the study

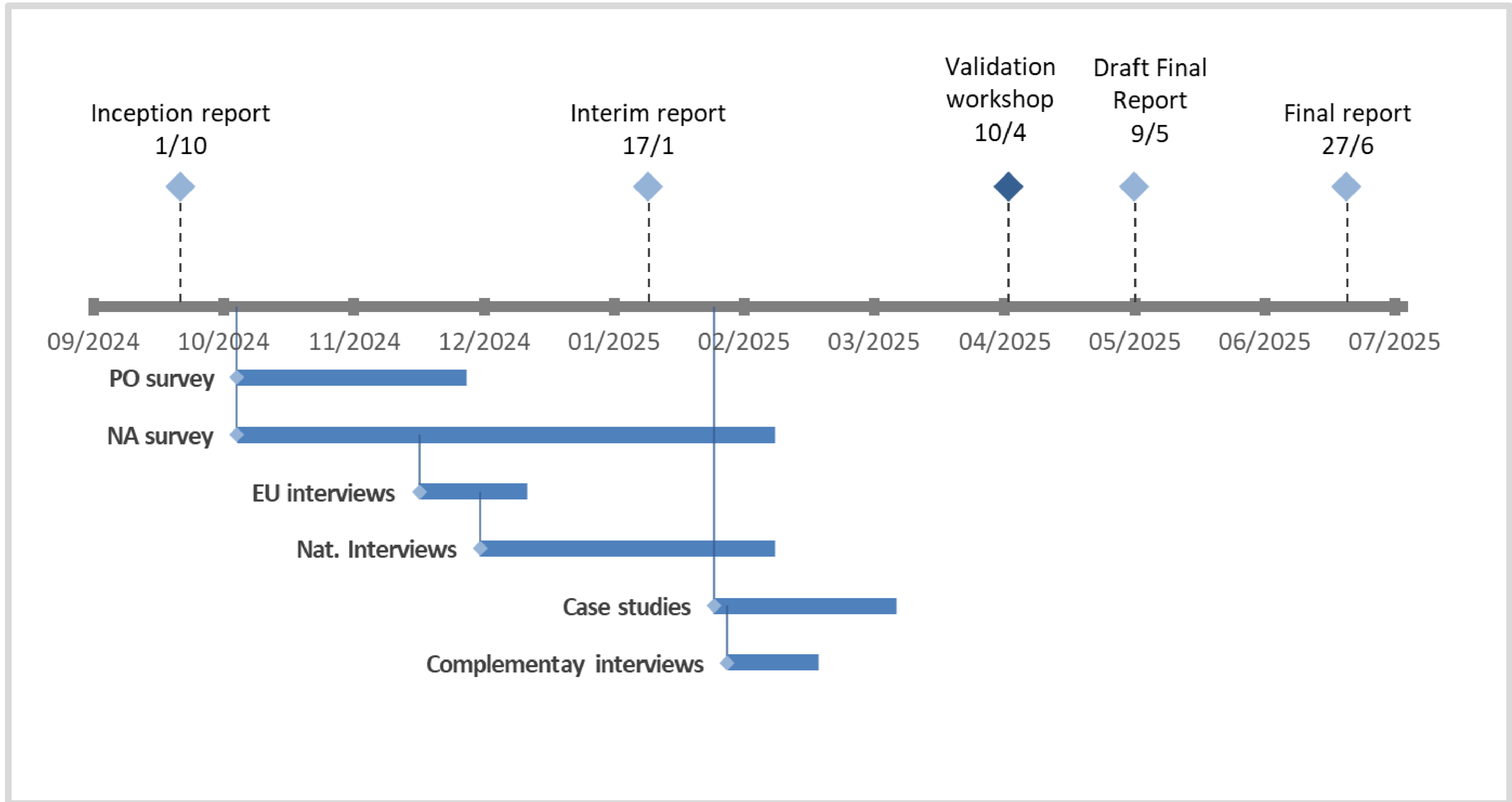
- General approach
- Key study questions
- Timeline
- Team



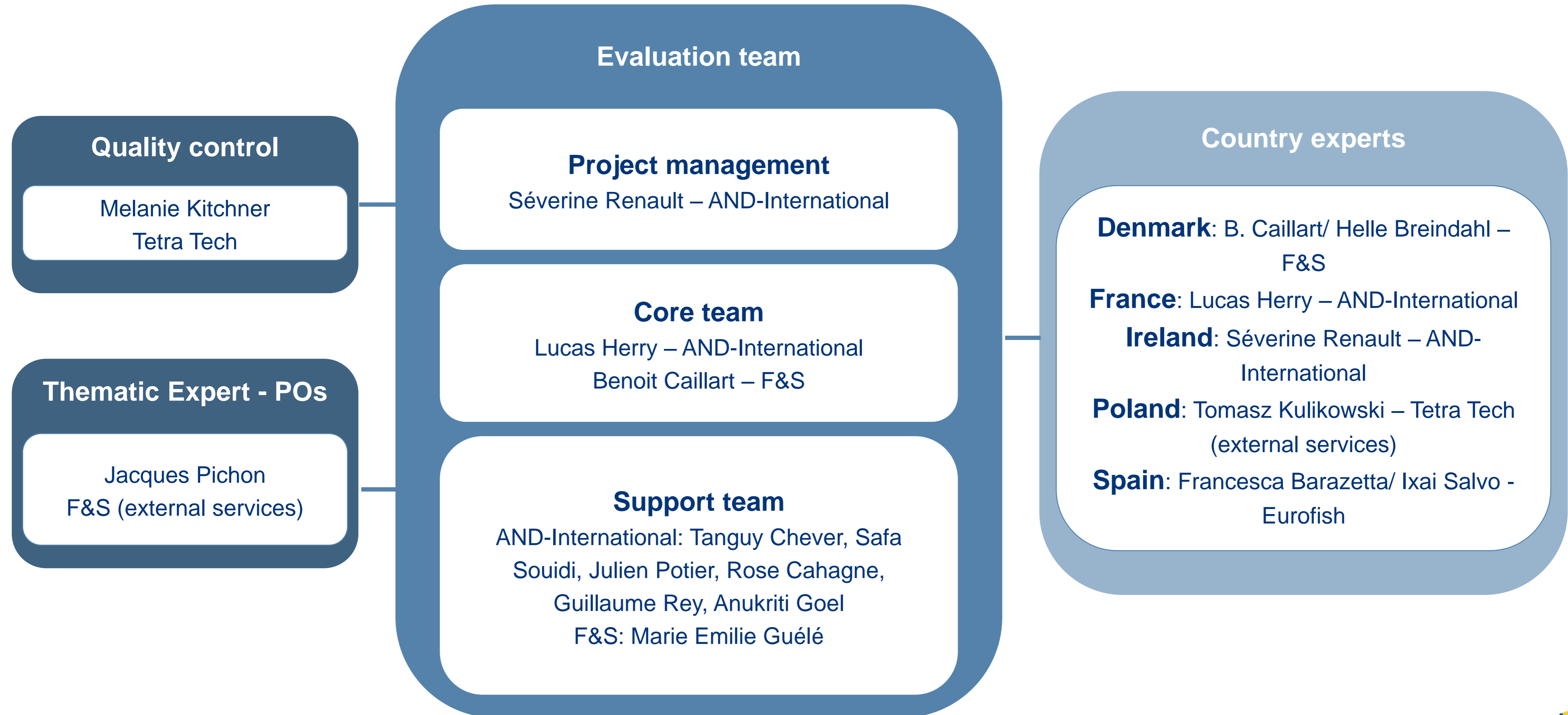
# General approach



# Timeline



# Team





# Key study questions on POs

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## **Representativity of POs, IBOs and APOs**

What is the representativity of POs, IBOs and APOs in the EU, in the different MS and for the main species caught by EU fisheries? To what extent do they represent small-scale producers and aquaculture producers?

## **Effectiveness of CMO Regulation**

Does the CMO Regulation sufficiently empowers POs, IBOs and APOs to achieve the CFP and CMO objectives (including through public funding)? What is the impact of the digitization of the sector?

## **Rules established by MS**

What are the rules established and implemented by MS for the recognition of POs, IBOs and APOs, and checks thereof ?

## **Governance and functioning of POs**

What are the characteristics of membership? How is governance organized? What are the decision-making processes? What are the impacts on achievements?

## **Possible improvements**

How could the recognition and check mechanisms be improved at EU and MS levels to support a level-playing field ?

# Key study questions on consumer information

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## **Correspondence with consumer needs**

Do the rules on mandatory and voluntary consumer information correspond to current consumer needs for fisheries and aquaculture products?

## **Contribution to the CMO/CFP objectives**

To what extent do the current consumer information requirements contribute to achieve the CFP and CMO objectives (incl. market transparency, level-playing field, fair competition, sustainable exploitation of living marine biological resources, etc.) ? Is the scope adequate?

## **Efficiency**

Are the costs incurred to implement the mandatory consumer information requirements proportionate and justifiable to the benefits achieved?

## **Enforcement and compliance**

What is the level of compliance with mandatory consumer information requirements? What may prevent compliance? To what extent is the revised Control Regulation expected to improve compliance?

# Data collection plan

- Interviews
- PO survey
- NA survey
- PO case studies
- Validation workshop



# Interviews at EU and national level

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- Interviews with representative organisations of the fisheries and aquaculture sectors at EU and national level in case study MS
- National and EU consumers' associations
- Interviews with a sample of operators in the value chain in case study MS
- Interviews with EU staff (DG COMP, DG ENV, DG AGRI, DG SANTE and Control Unit within DG MARE)
- Complementary interviews with national authorities in MS selected for the case studies

# Online PO survey

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## Target

- 226 organisations registered as PO, APO or IBO as of 11/24 (206 POs, 10 APOs, 10 IBOs)
- 182 organisations with valid email addresses (from the official registry, desk research and specific requests)

## Implementation

- Translated into all EU languages (automatic translation + proofreading in main languages)
- Online from 28/10/2024 to 4/12/2024 (37 days)
- Targeted reminders sent to POs in under-represented MS

## Content

- Profile questions: country, sector, size, fleet/aquaculture segments, etc.
- Main missions and activities
- Membership and governance: number and type of members, admission criteria, etc.
- For POs: APO membership, reasons for being or not in an APO, pros and cons
- Funding sources
- Digitalisation
- Changes since the reform of the CMO
- Production data
- Possibility to upload the last PMP and annual activity report

# NA survey

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## Implementation

- Questionnaires sent by email to National Authorities on 19/11/2024
- Questions on POs (Part I and II) sent to 18 MS
- Questions on consumer information requirements (Part III) sent to the 27 MS

## Part I: Representativity of POs

- Quantitative data on POs membership and production
- Trends if available
- Information on the possible delegation of quota management to POs

## Part II: Recognition rules and checks for POs

- Institutional context: organisations in charge, etc.
- Recognition rules at national level
- Implementation of controls
- Feedback on difficulties and good practices

## Part III: Consumer information requirements

- Institutional context: organisations in charge and resources allocated to controls
- Control tools and procedures, including risk-based approaches
- Data on inspections and compliance
- Possible improvements

# PO case studies

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## The selection will ensure a diversity of cases

- Activity: 12 case studies in fisheries, 3 in aquaculture
- Fleet segments: small-scale coastal fisheries, high-seas fisheries, and mixed membership
- Aquaculture type: specialised and diversified POs covering shellfish, marine finfish and freshwater aquaculture
- Different sizes
- Diversity of species

## Willingness to participate will be a key selection criteria

## Structure of the case study reports

- National context
- Membership: typology of members, admission rules, membership fees, compliance and sanction systems in place
- Governance: composition and functioning of the governing body, assembly general and other relevant instances
- Evolution in the governance and good practices
- Main missions and added-value of the PO to carry out these missions
- PMPs : involvement of members, and impact on the POs strategy, main achievements towards the CFP/CMO objectives

## Case study reports will remain confidential

# Validation workshop

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## Objectives

- Ensure appropriate interpretation of the findings from the data collection
- Discuss conclusions and possible improvements

## Foreseen participants

- Representatives of the sector (including members of the MAC)
- Other stakeholders (e.g. consumer organisations, NGOs, also including members of the MAC)
- National authorities (e.g. members of the expert group)
- EC staff

## Foreseen agenda

- Presentation in plenary session: data collection results, key findings on achievements of POs, APOs and IBOs and assessment of effectiveness and efficiency of consumer information rules
- Break-out sessions per topic (to be defined)
- Feedback from break-out sessions and conclusion in plenary

## Implementation

- Planned mid-April, online
- Will take place in English
- Participants will be surveyed before the validation workshop on preferred topics for the break-out sessions



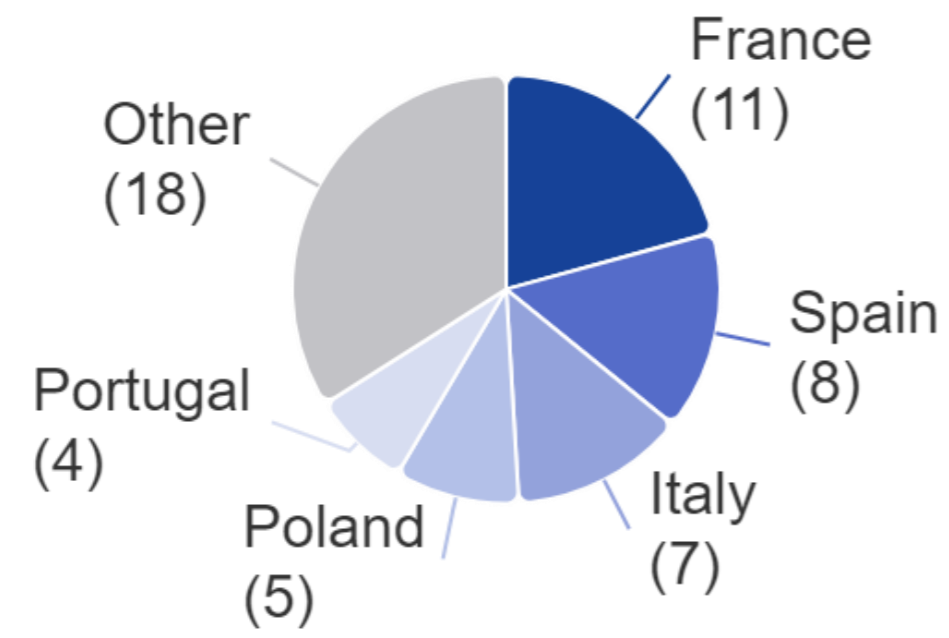
# First results of the data collection

- PO survey: respondents' profile
- Main missions and activities
- Main changes since the CMO reform

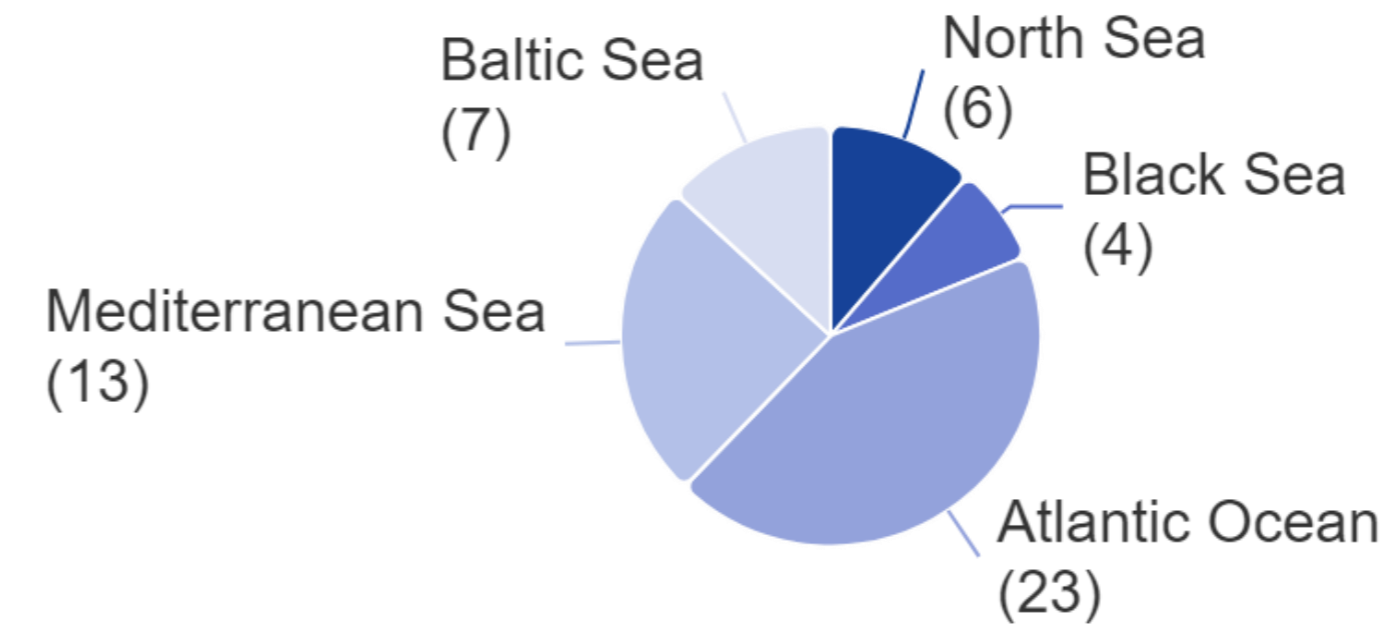


# PO survey – respondents' profile

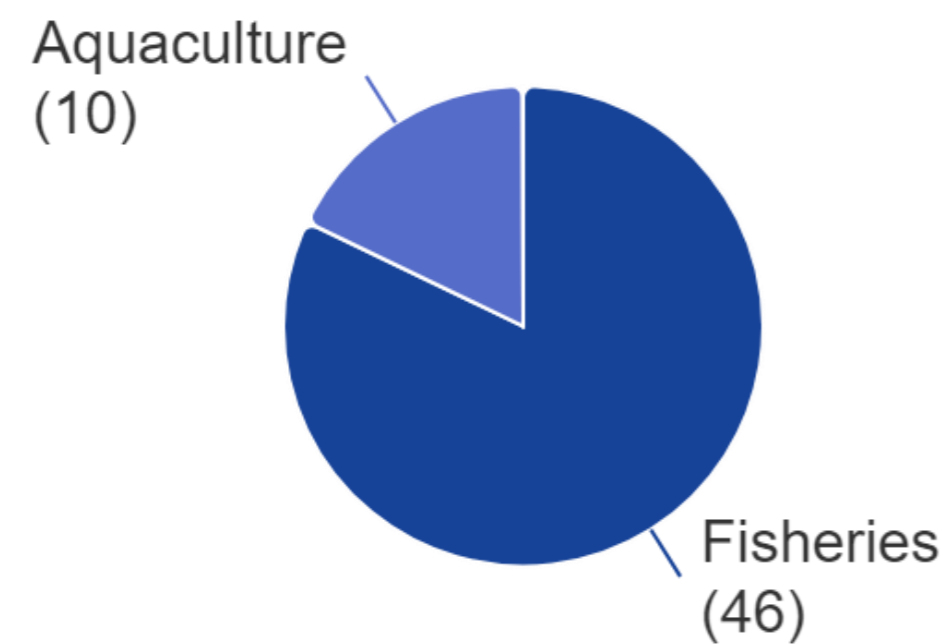
Country



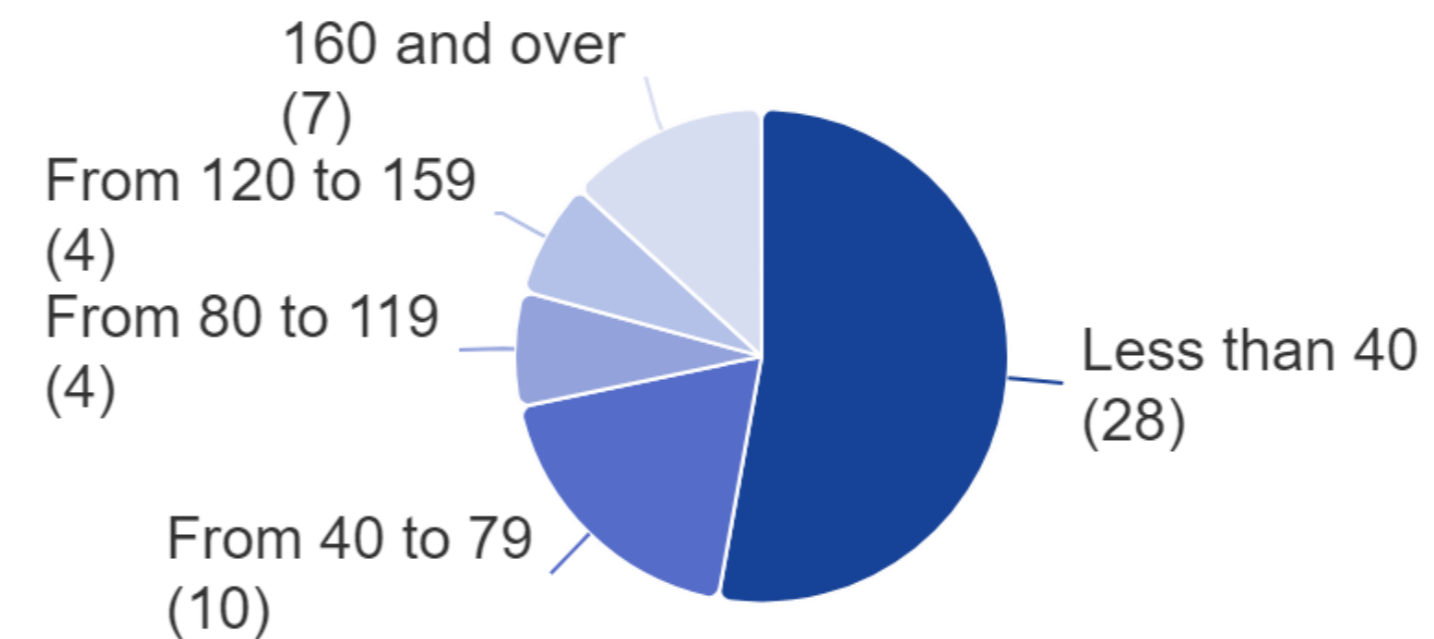
Sea basins (based on headquarters location)



Which sectors are represented in your organisation?



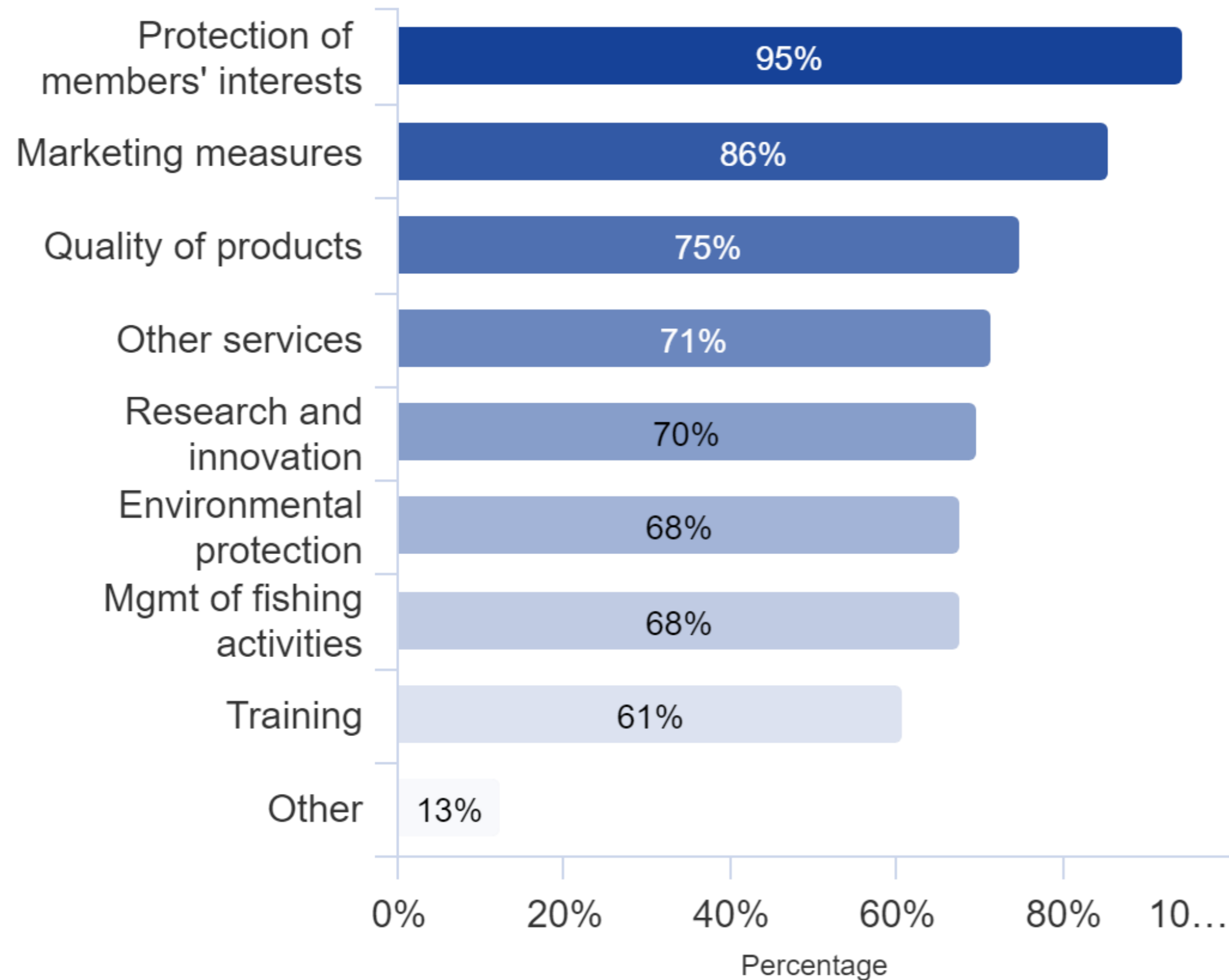
How many members does your organisation have currently?



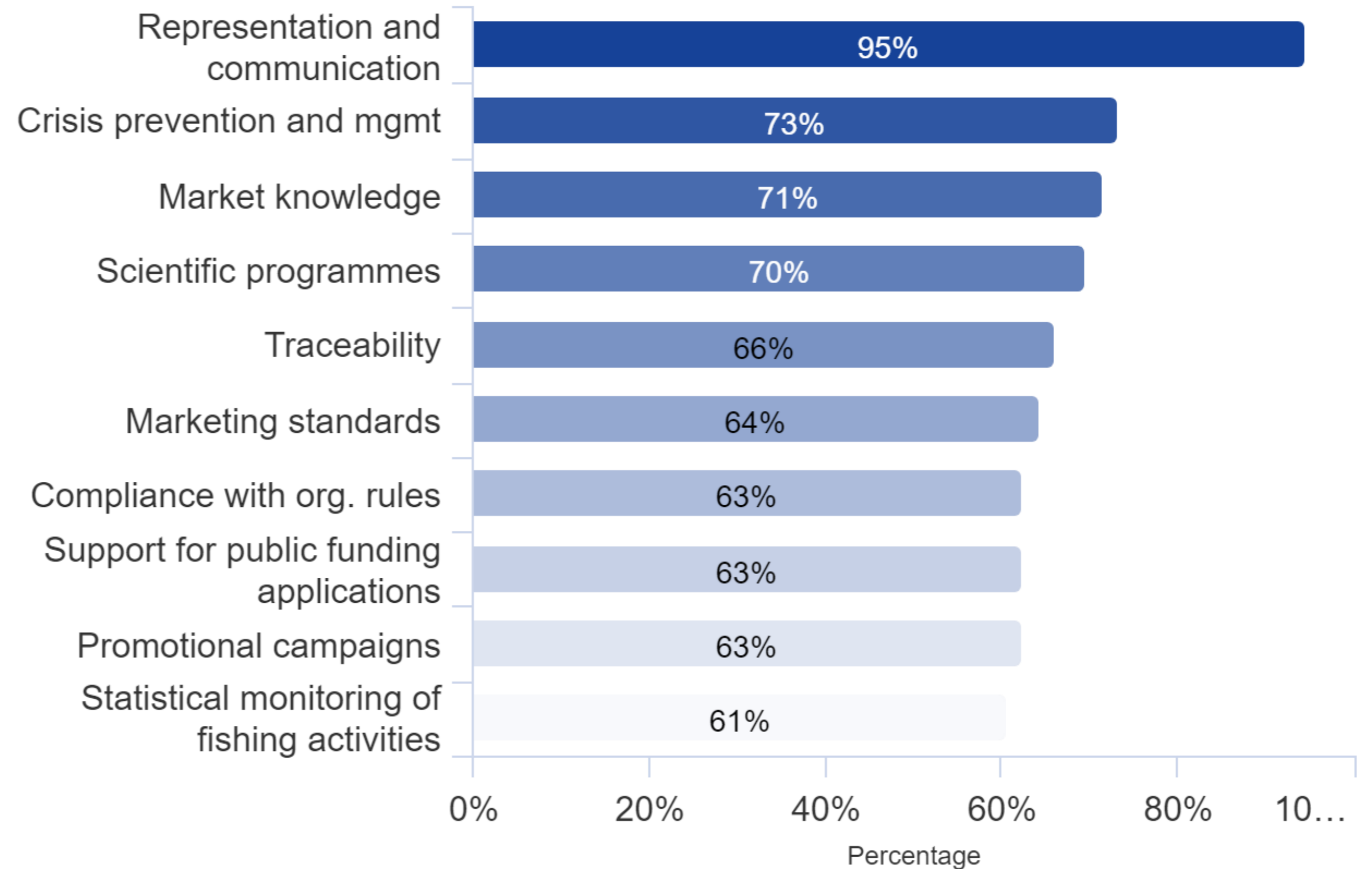
53 respondents (23% response rate), good geographical distribution, diversity of sectors and size

# PO survey – main activities

Do the missions of your organisation include :



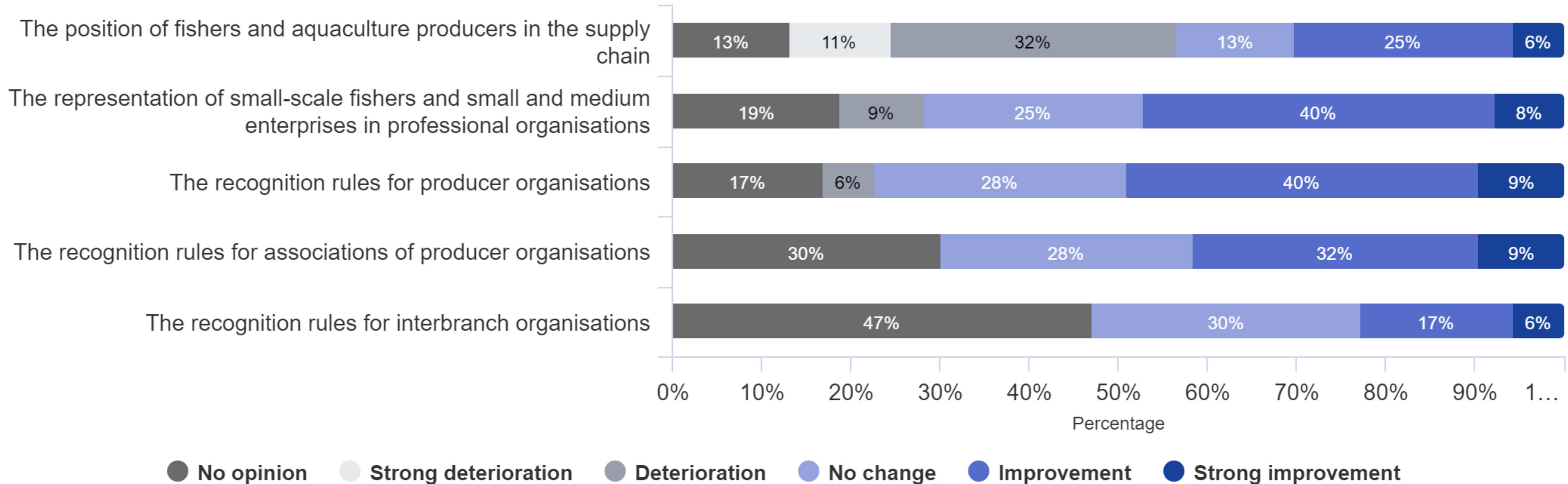
Specific activities under the different missions (first 10 answers)



POs, APOs and IBOs carry out a broad range of missions and activities

# PO survey – evolution since the CMO reform

How do you think the situation has changed since the 2013 reform of the Common Market Organisation, on terms of:



Main improvements observed are the recognition rules for POs and the representation of small-scale fishers and SMEs in POs

# Preliminary results on POs representativity

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**The share of POs in the national production is high variability across MS and sectors and is assessed to be stable over the past decade**

## **Representativity of POs in fisheries**

- 5 coastal MS with no POs for fisheries
- Among other MS, the share of total catches in volumes marketed by POs goes from 19% to 100%
- Overall the share of catches marketed by POs is estimated at around two thirds of total EU catches

## **Representativity of POs in aquaculture**

- The EU has recognised POs in aquaculture in 11 MS
- Among MS with POs, the share of total production in volumes marketed by POs goes from 12% to 100%
- Overall the share of the aquaculture production marketed by POs is estimated at around one third of EU production

# Next steps

- Complementary interviews
- PO case studies
- Analytical tasks
- Validation workshop



# Next steps

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- Follow-up with stakeholders at EU and national level for interviews (February)
- Follow-up with national authorities (February)
- Implementation of case studies (by mid-March)
- Analyses and reporting (March- April)
- Validation workshop (mid-April)
- Conclusions, recommendations and finalisation of the report (May, June)

Thank you for your attention!

Q & A

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