



Mandate

High-Level Roundtable – Fisheries and Oceans Dialogue – Helping design the European Oceans Pact (21 February 2025)

Brussels, 20 February 2025

1. Chair – Yobana Bermúdez

On behalf of the Market Advisory Council, I would like to thank Commissioner Kadis for the opportunity to participate in the first Fisheries and Oceans Dialogue and to contribute to the development of the European Oceans Pact.

2. The key challenges facing the EU's ocean governance model, and the priorities for addressing these challenges

For the EU market of fisheries and aquaculture products, the main piece of legislation is the Common Market Regulation, which positively contributed to competitiveness in the market through a common legislative framework and common standards. It also contributed to better consumer information and market transparency¹. Nevertheless, challenges remain, such as:

- Oceans being an important food procurement source, their governance should be considered as a whole including supply chains from harvest to consumers – in this context, the EU stands in global competition for seafood proteins while its own procurement is insufficient. As aquaculture has not developed in the EU as in other parts of the world, solutions to it can be sought through integration in the Pact. In a general concept of

¹ <https://marketac.eu/2022-report-on-the-functioning-of-the-common-market-organisation-cmo/>

sustainable food systems, both production (fishing & aquaculture) and market supply (trade & processing) should be considered.

- While there was an improvement in consumer information and awareness, it is essential to ensure adequate implementation of consumer information requirements across all Member States and retail outlets.
- While the Common Fisheries Policy emphasises sustainability, there is no agreed definition of “sustainable exploitation of fisheries resources” or EU-level harmonisation on environmental and social sustainability, so consumers can be confused by different messaging from different sources.
- Concerning trade with fair conditions, it is essential to ensure fair competition, particularly through respect for sustainability, including of the resources, and the application of social standards equivalent to the of EU products.

Overall, there are several key challenges in the implementation of the Common Fisheries Policy², such as:

- Achieving the ideal balance between the three pillars of sustainability.
- Ensuring sustainable and sufficient supply through the sustainable exploitation of fishery resources and the sustainable growth of aquaculture, in order to meet the growing demand for safe, healthy and high-quality aquatic products.
- Ensuring a global approach with a market perspective, considering the interests and concerns of all relevant stakeholders, including producers, processors, traders, retailers, consumers, and other interest groups.

² <https://marketac.eu/advice-on-the-functioning-of-the-cfp/>

- Supporting Producer Organisations and Associations of Producer Organisations through equitable application of financial aid across the Member States, as these have a crucial role to achieve the objectives of the CFP and of the CMO.
- Ensuring a level-playing-field in the market, while taking into account the products placed on the EU market imported from third countries – particularly in regard to labelling rules and international trade agreements.
- Adaptation to new realities, such as climate change, the withdrawal of the United Kingdom from the EU, and the decarbonisation of the fisheries and aquaculture sector.

3. The key measures needed to protect biodiversity and promote ecosystem-based management of the ocean, to sustain its climate function, health and productivity

In terms of environmental characteristics, in comparison with other protein sources, fisheries and aquaculture products generally have a lower carbon footprint, require little terrestrial surface and freshwater, and benefit from the biological efficiency of aquatic animals. Nevertheless, the following key issues should be highlighted³:

- The current context of emissions from land-based activities, warming oceans, pollution, invasive species, plastics, acidification and eutrophication is putting fish populations and marine biodiversity at risk, so public and private financing are needed.
- For aquaculture production, strict impact assessments and posterior surveillance plans are required for the setting of new farm operations. Therefore, there should be a clear link between the CFP and the EU's environmental and health legislation as well as a strengthening of the collaboration between the various responsible authorities.

³ <https://marketac.eu/advice-on-the-functioning-of-the-cfp/> and <https://marketac.eu/biodiversity-strategy/>

- As Illegal, Unregulated, and Undocumented (IUU) fishing harms marine biodiversity, the European Commission and the Member States must take a “zero-tolerance approach”, while ensuring sufficient control resources, well enforced traceability, provision of consumer information, promotion of better alignment of import control schemes among the major market States, among other measures.

4. The opportunities for sustainable growth and job creation in the EU's blue economy, and the role that the European Oceans Pact can play in promoting these opportunities

The fisheries and aquaculture sector is one of the main contributors to the Blue Economy, as the EU is a major global market for fishery and aquaculture products. In 2021, the reported turnover of the EU's marine living resources sector was about €126 billion, directly employing more than 543 000 persons⁴. The fish processing industry sector specifically generated a turnover of €29.4 billion and employed more than 111 000 people⁵.

The fisheries and aquaculture supply chain faces significant recruitment challenges, both in finding and maintaining workers, including for unskilled positions⁶. The European Commission should set-up a roadmap to address these challenges, which include the geographical distribution in coastal and rural areas, competition from other activities, gaps in skills, salary levels, working conditions, training costs, vocational training.

The European Commission should promote awareness of the skills relevant to the sector as well as promote the attractiveness of the sector, including through the removal of the negative image

⁴ <https://op.europa.eu/fr/publication-detail/-/publication/ef90077b-1e82-11ef-a251-01aa75ed71a1> (p. 15)

⁵ <https://stecf.jrc.ec.europa.eu/documents/d/stecf/stecf-23-14-fish-processing-industry> (p. 16)

⁶ <https://marketac.eu/european-year-of-skills/>

of the sector, better working conditions, availability of housing and transport, and development of production practices (automatization, robotisation, digitisation) to remove arduous aspects.

The European Commission should also facilitate access and take-up of available EU funding assistance mechanisms, including through clarification sessions, improved readability of the mechanisms, better communication – in the national languages of each Member State, and identification of liaison officers in companies and sector associations.

5. An effective marine knowledge value chain that supports EU competitiveness in ocean technologies and solutions, translated into market innovation

For the MAC members, the ex-post information provided by EUMOFA on volumes, values and prices of fisheries and aquaculture products, including imports and exports, as well as the annual “The EU Fish Market” report are greatly appreciated. While EUMOFA is not able to provide real-time and prognostic data, it is useful for the analysis of past situations, including analysis of consumption patterns and different impacts on the market⁷.

The periodical economic reports of STECF on the EU fishing fleet, the EU aquaculture sector, and the EU fish processing sector are also relevant to our members. In the case of the report on the EU fishing fleet, the timing of the nowcast should be extended to ensure better alignment between the economic advice and the scientific advice on the status of the stocks. The quality and relevance of the data collection on social variables should also be improved⁸. In the case of the report on the EU fish processing sector, there needs to be harmonisation of the data collected, including through the establishment of mandatory requirements as well as of mandatory minimum data for certain elements. There should be collection of data on raw

⁷ <https://marketac.eu/suggestions-for-eumofa-work-programme-2024/> and <https://marketac.eu/2022-report-on-the-functioning-of-the-common-market-organisation-cmo/>

⁸ <https://marketac.eu/stecfs-annual-economic-report-on-the-eu-fishing-fleet-2024/>

materials and distinction between production methods. The overviews should also allow for comparisons between enterprises in the fish industry and the general food industry⁹.

In order to better understand the effects of existing trade policy instruments on the EU market of fishery and aquaculture products, the EU trade data should be improved to allow the differentiation between aquaculture and wild caught categories, and to provide data for each trade instrument – how they are applied and utilised for each species of importance¹⁰.

6. The priorities for supporting the resilience and sustainability of coastal communities in the various sea basins of the EU

In the context of the European Green Deal and the Farm to Fork Strategy spearheaded by the previous College of Commissioners, there were a wide range of initiatives on sustainability that had an impact on the market of fishery and aquaculture products, namely the planned proposal for a Sustainable Food System Framework, the revision of the Regulation on Food Information to Consumers, the revision of the EU animal welfare rules, the Contingency Plan for Ensuring Food Supply and Food Security, the EU Code of Conduct for Responsible Business and Marketing Practices, the revision of the EU promotion programme for agricultural and food products, the Corporate Sustainable Due Diligence Directive, the EU-level targets for food waste reduction, the revision of the Food Contact Materials rules, the Green Claims Directive, the initiative on Empowering the Consumer for the Green Transition, the EU taxonomy, and the ban on products made with forced labour.

Overall, when developing such initiatives, the European Commission should ensure that the three pillars of sustainability (environmental, social, and economic) are taken into account. The DG

⁹ <https://marketac.eu/stecfs-economic-report-on-the-fish-processing-industry-2025/>

¹⁰ <https://marketac.eu/trade-policy-instruments-and-impact-on-the-eu-market-for-fishery-and-aquaculture-products-improvement-of-data/>



MARE services should be closely involved with the lead services to ensure that the effects on the EU market of fishery and aquaculture products are considered and that there is coherence with its specific policies, avoiding a situation where the EU's food policy is only designed from the perspective of agricultural products. There should particularly be coherence with other policy initiatives affecting communication to consumers¹¹.

To promote sustainability, the European Commission should continue to undertake messaging campaigns on fishery and aquaculture products, highlighting sustainability aspects, health, convenience, diversity of products, diversity of price points, the legal framework, and the positive human element aspects, while covering the different production methods and process of the supply chain¹².

To ensure resilience, the contribution of the fisheries and aquaculture value chain to food security must be kept in mind, including the need to maintain all parts of the supply chain operational even during crises. The vulnerability to the dynamics of global supply chains due to the EU market's love self-sufficiency must be considered¹³.

¹¹ <https://marketac.eu/substantiation-of-green-claims/>

¹² <https://marketac.eu/taste-the-ocean-campaign-and-other-potential-campaigns-for-awareness-about-fishery-and-aquaculture-products-in-the-eu/>

¹³ <https://marketac.eu/food-supply-contingency-plan/>