

## Working Group 2: EU Markets

### Minutes

Wednesday, 29 January 2025 (14:30 – 18:00 CET)

Copa Cogeca (Meeting Room A), Rue de Trèves 61, 1040 Brussels

Interpretation in EN, ES, FR

Welcome from the Chair, Pierre Commère

#### Presentation

**Adoption of the agenda and of the last meeting's minutes (02.12.24):** adopted

#### Action points

- **State-of-play of the action points of the last meeting – information**
- Fisheries Control Regulation:
  - Secretariat to collect feedback from the members on the upcoming additional rules for traceability of fresh and frozen fishery and aquaculture products and marking of lots, allowing for the consideration of draft advice at the next meeting
  - Follow-up exchange with Ms Anne Gautrais-Le Goff (MARE D4) to be scheduled under the draft agenda of the next meeting
    - Circulation of questionnaire from 6 to 20 December 2024
    - Agenda point scheduled for 17:30 CET

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

- **Presentation of 2024 edition of “The EU Fish Market” report by Commission representatives (MARE A4) and EUMOFA experts**

#### Presentation

Bianca Abbagnano (EUMOFA) presented the 2024 edition of “The EU Fish Market” report, which aims to provide a comprehensive overview of the EU fisheries and aquaculture sectors. She highlighted key findings from the report, noting that fish prices continued to rise in 2023, contributing to increased household expenditures. The EU trade balance improved during the same period, with the trade deficit decreasing by 8% compared to 2022. Additionally, marine fuel prices fell by €0.70 per litre by the end of 2023.

Ms Abbagnano explained that the report reflects different time lags depending on the type of data. For production data, the lag is three years, meaning the most recent figures refer to 2022. During that year, global production increased by 2%, with the highest production levels recorded in Asia. A notable milestone was reached in 2022 when global aquaculture production for food consumption



surpassed that of wild fisheries for the first time. However, EU production volumes declined by 4% during the same period.

Regarding trade flows, Ms Abbagnano noted that the EU remains the second-largest global trader of fishery and aquaculture products in terms of both value and volume, following China. In terms of the EU supply balance for human consumption, the total supply was 12.71 million tonnes live weight equivalent (LWE) in 2022. The overall supply balance has been decreasing since 2018, with the supply from fisheries decreasing more significantly than that from aquaculture.

Ms Abbagnano reported that the EU's self-sufficiency rate reached its lowest level in 2022, falling to 37.5%, which was 5% below the decade average. This decline is largely attributed to the fact that many of the main products consumed in the EU are imported. Specific species contributing to this trend included tuna, salmon, shrimps, Alaska pollock, and cod.

On per-capita apparent consumption, Ms Abbagnano informed that Portugal stood out as the leading consumer of fishery and aquaculture products. However, almost all EU countries experienced a decline in apparent consumption, with the exception of France and Croatia. Regarding specific species, salmon remained the most consumed fish in the EU, though consumption declined compared to 2021. In contrast, consumption of tuna and shrimp increased, while cod consumption fell to its lowest level in a decade. The report further highlighted that Germany accounted for 30% of the total EU volume of processed product consumption in 2023. In terms of sales of unprocessed products, she stated that the COVID-19 pandemic had a lasting impact on both retail and foodservice sales.

Ms Abbagnano outlined the trade patterns with non-EU countries. Import values decreased while export values rose slightly, resulting in a real-term trade deficit of 30%. Among EU countries with a trade deficit exceeding €1 billion, all saw improvements in their trade balance except Sweden. Highlighting the EU's role as a net importer of fish and a net exporter of meat, she informed that, in 2023, the value of imported fish was nearly five times higher than that of imported meat. Regarding free trade flows, both the volume and value of imports remained high, with one-third of EU imports sourced from Norway, followed by China, and the United Kingdom.

In terms of extra-EU exports, the nominal value increased by 1%, driven by inflation. Since 2021, the volume and value of exports had followed a similar trajectory, though the value saw a significant increase while volume remained stagnant. The United States was identified as the leading destination for extra-EU salmon exports. On intra-EU trade, Ms Abbagnano explained that these trade flows function differently, often involving re-imports. She explained that EU landings reached their lowest volume in the past decade, although the overall value increased, with squid value rising by 62%. She also provided an update on aquaculture production, highlighting that 2022 marked the second consecutive year of value growth, with a 16% increase, reaching a ten-year peak.

EU landings, from 2021 to 2022, decreased to reach the lowest level in the decade analysed. This was mostly driven by decreases in herring landings, especially in Germany, blue whiting and sardines. On the other hand, values increased for most species. Aquaculture recorded, in 2022, a decrease in volume but an increase in value, similarly to landings. However, in the last decade, aquaculture grew 14% in volume and 42% in real value. The main species farmed are trout and mussel, which drove the decreasing trend in 2022. In terms of value, a general spike in prices was recorded.



- **Exchange of views**

Javier Ojeda (FEAP) highlighted the relevance of the report for the entire supply as well as other interest groups. Regarding the reported reduction in the consumption of fishery and aquaculture products, Mr Ojeda asked about the methodology used, particularly whether it was based on Whole Fish Equivalent or real intake. He commented that the consumption figures did not account for consumption in the context of tourism activities.

Bianca Abbagnano (EUMOFA) explained that the calculation of apparent consumption was rather challenging. In the report, the figures were based on the Whole Fish Equivalent. Ms Abbagnano recognised that tourism was an important factor, particularly in Mediterranean countries, which was not considered in the figures.

María Luisa Álvarez Blanco (FEDEPESCA) highlighted her interest in the report. Ms Álvarez argued that the reduction in consumption was not due to the high price of fishery products, as the sector behaved in an appropriate manner when facing high inflation. In her view, the reduction was due to social changes and priorities, as the younger generation cooked less at home and had less access to aquatic proteins. She argued that it was important to provide more context in the report.

Bianca Abbagnano (EUMOFA) committed to take the points raised by Ms Álvarez into account in the next edition of the report.

Laurène Jolly (DG MARE) stated that, according to preliminary feedback of the next Eurobarometer survey, price was becoming increasingly important in the purchasing decisions of consumers. Seafood is widely perceived as expensive and price standards as the primary factor of consideration.

Stefan Meyer (Bundesverband Fischindustrie) agreed with Ms Álvarez. Mr Meyer expressed concern about the data sources used in the report, as these seemed biased towards the side of the supply. He drew attention to other data sources, which covered segmented households across several years – even though access to this data required payment. Mr Meyer argued that, in 2023 and 2024, the German market had not experienced any significant increases in prices, but that there were changes between categories of products. He called for the integration of further data on households, to better understand resilience and product valorisation.

Mike Turenhout (Visfederatie) recognised that price was an important factor but added that it was not the only one. Mr Turenhout argued that it was about the overall purchasing power of consumers. As their budget declines, consumers must make choices. The average price of fishery and aquaculture products remains higher than of some other protein sources. When combined with broader economic pressures, there is an influence on purchasing decisions.

Àngels Segura Unió (AECOC) underscored that there were multiple factors impacting consumer behaviour, while price was an important one. Ms Segura highlighted that consumption patterns are shifting, with growing preference for packaged fishery and aquaculture products, even though these are often priced higher than fresh alternatives. Therefore, there was an increase in demand due to convenience. Ms Segura argued that there were changes in consumer habits due to a general lack of knowledge about fishery and aquaculture products.



Roberto Alonso (ANFACO-CECOPESCA) expressed satisfaction with the quality of the report. Due to significant amount of data, Mr Alonso suggested the inclusion of an annex dedicated to import and export trade flows, which could be useful for the calculation of duties. He welcomed the coverage of consumption of proteins by households, as the comparisons between meat and seafood products were useful to understand broader market trends.

Bianca Abbagnano (EUMOFA), concerning the comparison between consumption trends of meat and seafood products, informed that a study was being undertaken on the matter.

## EU Market Supply

- **Presentation of “EU Seafood Supply Synopsis 2024” study by Mike Turenhout (Visfederatie)**

### Presentation

Mike Turenhout (Visfederatie), on behalf of AIPCE-CEP, presented the “EU Seafood Supply Synopsis 2024” study, previously known as the “Finfish Study”. Mr Turenhout explained that, while the report shares similarities with the EUMOFA report, it places greater emphasis on raw materials, a subject of particular importance to the processing industry.

Mr Turenhout outlined the study’s primary aim: to provide insights into seafood supply within the EU and highlight the potential impacts of EU policies on the availability of raw materials. He emphasised that ensuring the CFP remains fit for purpose is essential, particularly in terms of optimising catch potential and supporting aquaculture development. He stressed that the availability of raw materials is crucial for maintaining the viability of the EU processing industry, noting that insufficient supply undermines the sector’s competitiveness.

Turning to the study’s main conclusions, Mr Turenhout explained that the 2023 values were based on estimations. He noted these data indicated a 2% decrease in apparent seafood consumption compared to the previous year. Both imports from third countries and exports to third countries had decreased, with total seafood supply in the EU estimated at approximately 12.5 million tonnes. The main species categories driving the market remained whitefish, salmon, tuna, and shrimp. Mr Turenhout highlighted the EU’s low self-sufficiency rate, which stood at less than 38%, with the fishing quota utilisation at 66%.

Mr Turenhout further explained that total EU seafood consumption in 2023 amounted to 10.3 million tonnes, translating to an average consumption of 23 kg per capita. This figure reflected a continued downward trend, with one in three Europeans reportedly struggling to make ends meet, which is a situation that has inevitably impacted seafood consumption. He noted that consumers are increasingly switching to cheaper substitutes, both within and outside the seafood category. This downtrading trend has led to reduced dining out, a stronger focus on promotional offers, and growing concerns about shrinkflation.

Regarding species-specific findings, Mr Turenhout explained that the most consumed products identified in the study aligned with those highlighted in the EUMOFA report. He provided further details on the four key species categories: 1) whitefish, 2) salmon, 3) tuna, and 4) shrimp. Mr



Turenhout added that additional species-specific outlines are available in the report itself and on the AIPCE website.

Highlighting potential risks for trade, Mr Turenhout expressed concern about the resilience of the trade relationship with the United States, given the current geopolitical situation.

In comparing the EU Seafood Supply Synopsis 2024 with the EUMOFA study, Mr Turenhout underscored the importance of both reports. While the EUMOFA study provides a comprehensive overview, it is important to compare it to the Seafood Supply Synopsis, which uses its own conversion factors. He emphasised that these conversion factors align closely with those employed in the EUMOFA report. Nevertheless, Mr Turenhout mentioned that a letter had been sent to the European Commission advocating for finetuning and harmonising the conversion factors. He characterised this as an opportunity for dialogue and collaboration, calling for joint efforts to find a sustainable solution.

- **Exchange of views**

The Chair highlighted the importance of establishing consensual and as accurate as possible conversion factors for all fish figures.

Pim Visser (NOVA), concerning Mr Turenhout's reference to underutilisation of fishing quotas, argued that fishers were not willingly leaving quota uncaught. Instead, there were underlying issues related to the complex interaction between market dynamics and operational costs. While the price of fishery products is increasing, it remains insufficient to cover the costs of catching. Therefore, certain quotas remain unused due to economic constraints. He mentioned that budget of households was the main driving factor, as inflation continued to impact the price.

Mike Turenhout (Visfederatie) acknowledged the complexity of the issue and added that improved fishing quota utilisation would be welcomed by the EU processing industry.

The Chair commented that, even with a full fishing quota utilisation, the EU catching sector would not be able to provide sufficient raw material to the EU processing industry.

### **Illegal, Unreported and Unregulated (IUU) Fishing**

- **Presentation of study estimating the amount of illegal fishing by third countries in the waters of French Guiana by Sophie Leforestier**

#### Presentation

The Chair recalled that, at a previous meeting, the Working Group agreed to maintain a relationship of cooperation with the Outermost Regions Advisory Council (CCRUP) on matters related to the entrance of IUU fishing products in the market of the Outermost Regions, and thanked Ms Leforestier for accepting to present a recent study on the presence of illegal fishing by third countries in the waters of French Guiana. The Chair welcomed the attendance, as observers, of Ms Daniela Costa, CCRUP Secretary General, of Mr Leonard Raghnaith, CCRUP Vice-President, and of Mr Roger Aron, Vice-President of the Territorial Community of French Guyana.





Leonard Ragnauth (CRPM Guyane) thanked the MAC for the opportunity to exchange on the presence of illegal fishing by third countries in the waters of French Guiana. Mr Ragnauth highlighted the challenges faced by French Guiana in ensuring local food security. He emphasised the importance of sharing these challenges with European counterparts, as the geographical distance often resulted in limited awareness of the difficulties faced by Outermost Regions. He commented on the paradox of significant seafood imports despite Europe's own wealth of fishery products. He stressed the importance of ensuring that the issues affecting all Outermost Regions, including French Guiana, are recognised and addressed.

Sophie Leforestier (CRPMEM Guyane) presented the findings of a study assessing illegal, unreported, and unregulated (IUU) fishing in the waters of French Guiana, conducted over a 13-month period from 2023 to 2024 as part of a collaborative effort between CRPMEM Guyane, IFREMER and WWF.

Ms Leforestier provided a regional overview, explaining that French trawlers primarily engaged in shrimp fishing operate in the EEZ of French Guiana. In addition to local vessels, licences are granted to Venezuelan vessels, provided they land their catch at ports along the Guyanese coast. She noted that local French Guyanese vessels target two key species for their swim bladders: *Acoupa rouge* (*Cynoscion acoupa*) and *Acoupa aiguille* (*Cynostion virescens*). While the edible part of these species is valued at 4 €/kg, their swim bladders are sold at premium prices, reaching up to €160 per kilogram. While stock assessments in other regions indicate overexploitation, she highlighted that the stocks in French Guiana remain in good condition due to effective management measures.

Ms Leforestier stated that the study specifically examined the swim bladder supply chain, tracing trade flows from French Guiana to markets in Asia, specifically via the Hong Kong hub. Researchers conducted interviews with more than 50 stakeholders to map the trade routes. The study revealed that swim bladders are typically sold to local collectors, who then pass them on to exporters. Some bladders caught by French Guyanese fishers are sold directly to processors. Ms Leforestier highlighted the significant lack of traceability within the supply chain, making it difficult to determine whether the swim bladders originate from legal or illegal catches.

Noting the above, Ms Leforestier stated that the study built upon the most recent evaluation of IUU fishing conducted by IFREMER. The primary objective was to update the assessment of fishing effort in the region. Data for the study were collected through ongoing surveillance activities, including reports from control agencies and monthly aerial monitoring flights. The collected data were centralised and analysed, covering the period from 2019 to 2023. This analysis enabled researchers to identify the presence of various foreign fleets operating within French Guiana's EEZ, including Venezuelan longliners without licences and coastal vessels originating from Suriname and Brazil.

To evaluate fishing efforts, aerial surveillance provided estimates of vessel numbers within specific areas. On average, from 2019 to 2023, aerial missions revealed the presence of 20 vessels coming from Brazil and 10 vessels from Suriname and Guyana conducting fishing operations in French Guiana's waters. However, Ms Leforestier explained that gaps in the available data limited the precision of the analysis, requiring the aggregation of data on an annual basis.

Ms Leforestier highlighted that the research team developed assumptions to extrapolate annual figures for IUU fishing based on the collected data. Production estimates were calculated using control



vessel inspections, which provided estimates of total catch per vessel, occasionally including species-specific data. These estimates were further refined by considering variations in net length and multiplying the daily yield by the number of fishing days at sea. This approach enabled the team to generate total catch estimates for both the eastern and western coastal areas of French Guiana.

Ms Leforestier presented the study's key findings, noting that the extent of illegal fishing varied depending on the correlation strength applied during the analysis. With a weak correlation, the study estimated that the volume of illegal fishing in 2023 was approximately 0.7 times greater than that of legal fishing. Under a strong correlation, the estimate increased to approximately four times the volume of legal fishing. One of the study's objectives was to compare current fishing pressure with that observed during the last major assessment conducted in 2012. While different methodologies were employed in the two studies, standardisation techniques were applied to enable a valid comparison. The results indicated a significant increase in IUU fishing activity since the previous evaluation.

Ms Leforestier further explained that WWF had coordinated additional aerial surveillance efforts, which facilitated the development of a detailed map based on observed activities. Over 100 vessels were detected, with the data clearly showing that French Guyanese vessels were frequently surrounded by Brazilian and Surinamese vessels operating illegally. The study also highlighted the impact of enforcement activities. When French control vessels operated near the border, the number of illegal vessels in the eastern part of the EEZ decreased significantly. Furthermore, increased enforcement efforts led French Guyanese vessels to expand their fishing range, demonstrating the direct effect of monitoring on fishing behaviour.

Ms Leforestier informed that the final report had been drafted and published following consultation with all project partners. She mentioned that, once published, the report gained significant attention both internationally and within French Guiana.

- **Exchange of views**

The Chair asked about the effectiveness of current measures to combat IUU fishing, as the only control mechanism mentioned appeared to be vessel surveillance. The Chair asked how French Guiana plans to strengthen its efforts in fighting IUU fishing.

Leonard Raghnauth (CRPM Guyane) responded by expressing the deep frustration felt by local communities in French Guiana, explaining that the region is heavily impacted by foreign vessels engaging in illegal fishing activities. Mr Raghnauth emphasised that these incursions constituted a violation of EU borders and were essentially acts of piracy, as foreign fishes looted national resources. He underscored the socio-economic impact, as the local population relies on seafood for sustenance and the territory continues to face economic hardship.

Mr Raghnauth highlighted that the EU was imposing limitations to the renewal of the local fleet due to the fishing activity being considered unbalanced. Therefore, adequate enforcement capabilities were needed. In his view, the current resources were insufficient, adding that local authorities were striving to double the means available for monitoring and control. He praised the efforts of CCRUP,



which has been instrumental in pushing for increased enforcement actions in the region, including through a recommendation adopted in September 2024.

Mr Ragnauth drew attention to the paradox of Brazil achieving seafood self-sufficiency and Brazilian vessels exporting seafood to the EU while simultaneously engaging in illegal fishing activities in EU waters, including those of French Guiana. He expressed particular concern about the Mercosur agreement, questioning how such an agreement could be maintained while Member States are directly affected by illegal fishing activities linked to Mercosur countries.

Joanna Żurawska - Łagoda (Polish Ministry of Agriculture and Rural Development, Department of Fisheries) asked for further clarification regarding the specific attractiveness of the targeted species *Acoupa rouge* and *Acoupa aiguille*, questioning why they are so heavily sought after for illegal fishing.

Leonard Ragnauth (CRPM Guyane) responded that the issue extends beyond commercial value, as it touches on questions of food sovereignty and local resilience. He emphasised that access to local fish supplies allows the people of French Guiana to avoid reliance on imported products. The targeted species are not only important for local consumption but are also highly valued in Asian markets due to their swim bladders being perceived with aphrodisiac properties. Twenty years ago, these products were worth 13 to 14€ per kg, while now these were valued at 160€ per kg. Mr Ragnauth stated that these species are particularly vulnerable as they are easy prey due to the lack of fear among foreign fishing vessels, which reflects a perception that French enforcement efforts are insufficient.

Roger Aron (Vice-president of the Territorial Community of French Guiana) drew attention to the destructive practices associated with illegal fishing in the region. Mr Aron explained that Brazilian and Surinamese fishing vessels often target only swim bladders, discarding the rest of the fish at sea. This practice results in significant waste, in stark contrast to the approach of the local population in French Guiana, who consume the entire fish. He emphasised the negative impact on the region's food security.

- **Way forward**

The Chair proposed to proceed with a joint advice with the CCRUP focused on the fight against IUU fishing in the Outermost Regions, particularly in French Guyana. The Chair stated that he would wait for a first proposal from the CCRUP, which would then be considered also in the MAC.

### Trade Agreements & Trade Policy Instruments

- **Update on latest trade developments by Commission representatives (MARE B3), including:**
  - **EU – Morocco Free Trade Agreement (Judgments of EU Court of Justice)**

Pawel Szatkowski (DG MARE) informed that there were no significant developments concerning the judgments of the EU Court of Justice on the EU-Morocco Free Trade Agreement, as the Commission was still assessing the implications of these on the relationship with Morocco. The Commission would need to engage in bilateral discussions with the Moroccan authorities regarding the fisheries access agreement and the broader trade agreement. Mr Szatkowski recalled that the judgment included a transitional period allowing the trade preferences to apply to Western Sahara until October 2025.





- **Exchange of Views**

The Chair requested information on how the rules of origin would be applied, as the transition period had already started. The Chair asked for more clarity on the deadlines imposed by the judgment.

Giorgio Rimoldi (Unione Italiana Food/ANCIT) drew attention to the significant investments made in Western Sahara by canning companies. Mr Rimoldi called for a clear framework for the future, as there were three agreements with Morocco, namely the association agreement, the fisheries agreement, and the agreement extending trade benefits to products originating from Western Sahara. He asked for clarification on which agreements were affected by the judgments.

Roberto Alonso (ANFACO-CECOPECA) requested information on whether DG MARE was assessing the impact of the trade duties on the imports into the EU market. Mr Alonso also asked about the calendar of meetings planned with Moroccan authorities and representatives of Western Sahara.

Pawel Szatkowski (DG MARE) explained that, following the judgments, the Protocol of the Sustainable Fisheries Partnership Agreement with Morocco had not been extended, so no EU fleet can currently operate in the waters of Morocco. Concerning trade, the judgments only impact the extension of trade preferences to products coming from Western Sahara. From October 2025 onward, in the absence of new agreements, products imported into the EU originating from Western Sahara will no longer benefit from the EU-Moroccan trade agreement provisions. As for the calendar of meetings, he informed that the matter was still being internally analysed by the Commission services.

- **EU – Mercosur Free Trade Agreement**

Pawel Szatkowski (DG MARE) informed that the negotiations had been concluded five years ago, and a political agreement had been reached on 6 December 2024, as. The text was now undergoing legal review. The text would be translated into the official languages of the EU and put forward for signature by the Council and consent by the European Parliament.

Mr Szatkowski explained that, on market access, the agreement provided liberalisation of most fishery products, with the exception of those deemed sensitive to the EU, such as tuna loins and canned tuna. Products, such as hake, shrimp, and herring, would be subject to “staging” arrangements, meaning a transition period of seven to ten years for the removal of duties.

In terms of EU exports to Mercosur, each Mercosur Member State would apply its own tariff liberalisation schedule. Reductions would range from 4 to 10% for unprocessed products and 13 to 16% for processed products. Concerning the trade relationship between the EU and Mercosur on fishery products, Mr Szatkowski explained that, annually, the EU imports approximately 120,000 tonnes of fishery and aquaculture products from Mercosur countries, most imports originating from Argentina, while it exports 13,000 to 17,000 tonnes, mostly frozen and dried cod and frozen octopus to the region, and shark meat to Brazil.

Mr Szatkowski explained that the standard rules of origin would apply to the agreement. In terms of ownership criteria, at least 50% would have to be owned by nationals. Otherwise, there was a crew requirement of 2/3 of the crew of the fishing vessels being nationals. Chartered vessels must operate under the fishing license of a Mercosur Member State or an EU Member State. The Commission



representative added that the agreement includes a sustainable development chapter, covering the main international agreements, including on Regional Fisheries Management Organisations, the fight against IUU fishing, and the FAO's Codes of Conduct.

- **Exchange of Views**

The Chair asked about the possibility of cumulation of origin among Mercosur Member States.

Pawel Szatkowski (DG MARE) confirmed that the regional cumulation was in the agreement.

Roberto Alonso (ANFACO-CECOPESCA) stated that the agreement provided for a better supply. The rules on origin and crew percentage would be easy to apply to Mercosur exports, but more challenging for EU exports. Mr Alonso welcomed the exclusion of tuna products from the liberalisation but wondered if the liberalisation of canned bonito<sup>1</sup> had been an oversight. He added that the EU would likely require Autonomous Tariff Quotas for tuna raw material.

Pablo Cadarso (Conxemar) commented that, for the supply of raw material, the agreement seemed to focus on a few specific species, such as *Pleoticus muelleri*, among others, through a transitional period of three to seven years. Mr Cadarso stated that this Argentinian shrimp was the most relevant product, representing 72% of the imports from Mercosur. In his view, there was a lack of coherence in the spirit of liberalisation followed by the agreement.

Pawel Szatkowski (DG MARE) recognised the importance of hake and cold-water shrimp for the supply from Mercosur to the EU. The shrimps are covered by the Autonomous Tariff Quotas Regulation. As it was considered a sensitive product, it was placed under "staging". As for the crew requirements, Mr Szatkowski clarified that it was an alternative requirement, so, in the exports from the EU to Mercosur, the ownership provisions could be applied. He expressed availability to check on the issue of canned bonito.

Pablo Cadarso (Conxemar) responded that, even though shrimps were covered by the Autonomous Tariff Quotas Regulation, the foreseen volumes were exhausted early in the year due to the high market demand. In his view, there should have been a stronger liberalisation spirit in the agreement. He argued that Autonomous Tariff Quotas would be needed during the transition period. The quotas should be expanded, as, the previous year, these were exhausted in January.

Pawel Szatkowski (DG MARE) responded that it was difficult to know how the Commission's legislative proposal for the next period would look like, recalling that it would also depend on the positions of the Member States. He stated that note was taken of the comments made.

- **EU – Thailand & Indonesia Free Trade Agreements**

Julien Daudu (EJF) requested an update on the negotiations for free trade agreements with Thailand and Indonesia.

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<sup>1</sup> Bonito species mentioned in part II of annex of regulation (EEC) 1536/92 of the Council



Pawel Szatkowski (DG MARE), concerning Indonesia, informed that, before the Christmas holiday, meetings took place to conclude the negotiations, as the initial political deadline was end of 2024. Nevertheless, the current outlook was February 2025, as limited progress had been achieved since the last round of negotiations. As for Thailand, Mr Szatkowski informed that a new round of negotiations would take place in March 2025 in Brussels. He added that, until that moment, no exchange of tariff offers had been made.

- **Update on the on the call for evidence launched by the Commission on the eventual consideration of sustainability criteria in view of the next Autonomous Tariff Quotas round for fishery products by Commission representatives (MARE B3)**

Pawel Szatkowski (DG MARE) informed that, since the previous update, progress had been made on the initiative, as the Commission launched the impact assessment on the consideration of sustainability criteria in the Autonomous Tariff Quotas Regulation. A call for evidence was launched in October 2024. Input was received from several MAC members and other stakeholders. A public consultation would be launched during the first quarter of 2025. He encouraged the members to participate in the public consultation and share their views.

Concerning the impact assessment, Mr Szatkowski explained that a study had been commissioned to include both ex-post and ex-ante analyses of the Regulation. The study will adhere to the requirements outlined under the EU's Better Regulation framework, ensuring a comprehensive evaluation. He informed that the consultant conducting the study would also reach out to stakeholders for interviews aimed at filling data gaps and gathering further insights.

Regarding the timeline, Mr Szatkowski informed that the study, which was the first stage of the assessment, would be completed in May/June 2025. The full impact assessment would be concluded by the end of the year via a Staff Working Document. If deemed appropriate, the proposal would be published in early 2026.

#### ○ **Exchange of Views**

Juan Manuel Trujillo Castillo (ETF) mentioned that, earlier that day, the Commission had published the Competitiveness Compass. Mr Trujillo wanted to know how it would impact the sector of fishery and aquaculture products, particularly exports.

The Chair recognised the importance of the document but added that it might be too early for the Commission representative to be able to comment.

Pawel Szatkowski (DG MARE) clarified that the ongoing initiative on the Autonomous Tariff Quotas Regulation was focused on sustainability, not on competitiveness.

Gerd Heinen (DG MARE) explained that the Competitiveness Compass was strongly inspired by the Draghi report on EU competitiveness. The Compass reflected a clear focus of the Commission's mandate on enhancing competitiveness, which could benefit the entire value chain but that – on the day of the adoption - it was too early to assess how exactly this could apply to fishery and aquaculture products.



Roberto Alonso (ANFACO-CECOPESCA) wanted to know whether social and economic sustainability would also be part of the study to be undertaken on the Autonomous Tariff Quotas Regulation. He argued that DG TAXUD should also be involved in the ongoing considerations.

Pawel Szatkowski (DG MARE) responded that the evaluation would consider all three pillars of sustainability (environmental, social, and economic) while ensuring compatibility with World Trade Organization (WTO) standards.

Pablo Cadarso (Conxemar) inquired about the timeline for addressing the technical aspects of the Mercosur agreement, particularly when it would enter into force.

Pawel Szatkowski (DG MARE) explained that the agreement is currently under consideration by the Council and the Parliament.

The Chair asked whether the name of the consultant conducting the study on the Autonomous Tariff Quotas Regulation was publicly available.

Pawel Szatkowski (DG MARE) responded that the study would be carried out by Cogea. The consultants would soon start reaching out to stakeholders, as part of the consultation process.

- **Consideration of draft advice on the integration of sustainability criteria under the regime of Autonomous Tariff Quotas for certain fishery products**

The Secretary General provided an outlined of the draft advice on “Integration of sustainability criteria under the regime of Autonomous Tariff Quotas for certain fishery products”, which had been based on contributions from AIPCE-CEP, ANFACO-CECOPESCA, ANOP, Conxemar, FEDOPA, FRUCOM, Oceana, and PACT’ALIM. Prior to the meeting, preliminary feedback on the draft text was sent by ANFACO-CECOPESCA, Europêche, and Oceana.

Katarina Sipic (AIPCE-CEP) stated that, while the positions of the various stakeholders were well known, it would be challenge to exchange on the matter. Therefore, in her view, a small informal drafting group should be established to finalise the text.

Guus Pastoor (Visfederatie) expressed agreement with Ms Sipic’s suggestion. Mr Pastoor cautioned against broadening the scope of the advice, arguing that the focus should remain strictly on the technical aspects relevant to the Autonomous Tariff Quotas regime. He emphasised that the inclusion of general statements would risk extending the discussions.

Juan Manuel Trujillo Castillo (ETF) expressed support for the positions of Europêche and Oceana. Mr Trujillo argued that the instrument should align with minimum social and environmental standards, as it was necessary to ensure fair competition between producers and suppliers from third countries.

Patrick Murphy (IS&WFPO) argued that it was necessary to consider the impact of the instrument on EU producers, including on competitiveness.

Stefan Meyer (Bundesverband Fischindustrie) called for the inclusion of clear recommendations on the import procedures. Mr Meyer drew attention to previous negative experiences with customs



authorities, including different approaches across Member States on the accepted documentation. He urged the Commission to actively promote clarity in the implementation of import controls.

The Chair agreed with Mr Meyer, arguing that complex regulatory regimes often lead to distortions in the implementation. The Chair expressed support for Ms Sipic's suggestion to establish an informal drafting group to finalise the text. He also agreed with Mr Pastoor that the focus should be on technical aspects.

- **Way forward**

The Secretary General proposed that, following an informal exchange with the most interested members, the draft advice would be circulated to the Working Group via an urgent written procedure, providing all members with the possibility to provide feedback. After reaching agreement, the text would be put forward to the Executive Committee for consideration and potential adoption.

### Fisheries Control Regulation

- **Update on Commission's preparatory work for additional rules for traceability of fresh and frozen fishery and aquaculture products and marking of lots to be adopted through a delegated act by Anne Gautrais-Le Goff (MARE D4)**

#### Presentation

Anne Gautrais-Le Goff (DG MARE) provided an update on the Commission's preparatory work for additional rules concerning the traceability of fresh and frozen fishery and aquaculture products as well as the marking of lots. She informed that limited progress had been made since the previous *ad-hoc* meeting in December 2024.

Ms Gautrais-Le Goff reminded members that the forthcoming delegated act would incorporate two articles on traceability : 1) additional traceability information for lots of fresh and frozen fishery and aquaculture products, and 2) marking of lots of fishery and aquaculture products. Both elements are built on the current provisions outlined in an existing implementing act (Commission Implementing Regulation 404/2011) and the new rules sets in the revised Article 56a and 58 of the Fisheries Control Regulation. The draft presented in December 2024 underwent some modifications following feedback received from Member States, including Germany, the Netherlands, Latvia, and Ireland. Overall, Member States expressed satisfaction with the current draft text, though some questions were raised regarding some terminology. In the view of the Commission's services, the text seems almost ready for adoption.

Ms Gautrais-Le Goff informed that the Commission planned to produce a final draft by the end of February 2025, on which Member States will be able to further comments in an in-person meeting. Subsequently, the interservice consultation process would commence, and, as it is a delegated act, the European Parliament would be consulted. Adoption is expected by June or July 2025, for an application by 10 January 2026. While some challenges for operators may still arise, fact-finding missions on traceability conducted by DG MARE ( in Spain and France) indicated that operators seem generally well-aware of the new requirements and willing to undertake the necessary changes to their traceability systems.





Ms Gautrais-Le Goff also provided an update on the progress towards the study on feasible traceability systems and procedures for prepared and preserved products. Mid-December 2024, CINEA, through a framework contract for services, notified the three selected consortiums of the Terms of Reference for that study, but unfortunately no offers were received for the initial request. As a result, a decision was made to re-launch the request for services with a more flexible timeline for submitting offers. The aim is still to initiate to start the project by June 2025 at the latest. In terms of the timeline, she explained that if a suitable offer is received within the revised deadline, the study could commence as planned, with only slight delays. The study's final results were expected at the latest by the end of 2026 ( +18 Months after its start). Operators would need to adapt their traceability systems by 2028, with full application of the new traceability requirements for prepared and preserved products by 10 January 2029. In parallel, DG MARE plans to continue its fact-finding missions on traceability to exchange and learn from operators on the challenges and solutions available.

- **Exchange of Views**

Stefan Meyer (Bundesverband Fischindustrie) expressed support for the concise approach taken in the drafting of the provisions of the delegated act. Mr Meyer called for the integration of the “gatekeeper” approach in the delegated act, which would provide flexibility in the definition of lots without compromising traceability.

Mr Meyer drew attention to ongoing challenges faced by operators, as it was difficult to find solutions. In his view, operators would require one year to adapt their internal systems as well as change their supply contracts and administration. The situation would be particularly challenging for complex products, including smoked products. He suggested the development of a guidance document outlining the minimum requirements that should be in place by 10 January 2026, to ensure consistency across Member States. He argued that exemptions could be needed in the first two years of implementation.

Anne Gautrais-Le Goff (DG MARE) recognised the importance of continuing undertaking fact-finding missions and willing to go next in Germany. Ms Gautrais-Le Goff reminded that the definition of “lot” remained general while the conditions of a lot of fresh and frozen fishery and aquaculture products previously set in the old definition of lot are now copied in Article 56a (Article 2 of the revised Fisheries Control Regulation). The delegated act to come cannot contradict the basic revised Fisheries Control Regulation. Regarding the draft proposed article additional traceability requirements for fresh and frozen products, Ms Gautrais-Le Goff informed that the Commission had not received any major objections from Member States, including Germany. She expressed availability to engage in bilateral exchanges to facilitate effective implementation. She added that the development of interpretative guidance could only take place after the approval of the delegated act.

Concerning the date of application, Ms Gautrais-Le Goff recalled that, as the revision of the Fisheries Control Regulation had been a decision of the co-legislators, a delegated act could not amend the agreed date of application. Such change could only be done by an amendment of the set dates by co-decision. She recognised that some stakeholders would face more challenges than others. She advised them to communicate those challenges to DG MARE. She further recognised that, in the case



of products under Chapter 03 of the Combined Nomenclature, stakeholders could face challenges in the digital recording of information by January 2026, which was why it was important for stakeholders to maintain exchanges with their national authorities. She added that she took note of the concerns about the date of application.

The Chair stated that a recommendation on the issues mentioned could be added to the draft advice.

Roberto Alonso (ANFACO-CECOPESCA) expressed concern that the ongoing timeline could result in Member States learning from experience, due to the lack of resources, rather than having clarity on requirements before the act enters into force. Mr Alonso called for detailed guidelines to ensure that Member States understand the requirements by January 2026. He suggested that enforcement should take a similar approach than the one foreseen under the Due Diligence Directive, gradually scaling according to the size of enterprises. He added that, in the case of imports from third countries with paper-based documentation, it was unclear who would be responsible for the transmission of the data.

María Luisa Álvarez Blanco (FEDEPESCA) called on the Commission to talk with the available providers for digital transmission, including with AECOC, which implements the GS1 standards in Spain.

Àngels Segura Unió (AECOC) explained that GS1 is an internationally recognised traceability standard. She shared that, for several years, efforts had been made to implement the GS1 standard across Spanish seafood products. However, as of today, few operators have successfully adopted the standard across their entire supply chain. To address this gap, she suggested organising a bilateral meeting or providing a dedicated presentation to the Commission on how the GS1 standard could be effectively implemented throughout the EU.

Anne Gautrais-Le Goff (DG MARE) responded that the provision of guidance was possible, but not before the date of application of the delegated act. In the case of expected problems, stakeholders should initiate exchanges with public authorities. She explained that it would not be possible to implement different enforcement dates based on the size of enterprises, as the revised Fisheries Control Regulation would apply equally to all operators. As for the paper-based documentation and the digitalisation of the data for imported products, these would be covered by the new CATCH IT system.

Ms Gautrais-Le Goff recalled that the reference to GS1 standard was mentioned as a possibility in the draft provisions, given that it is a worldwide standard used for many commodities, not only food products. She reiterated that the Commission was aiming to ensure flexibility for operators in the implementation of traceability systems. The Commission would be exchanging with the Member States on the draft legal provisions.

Adrien Simonnet (UMF) wanted to know if there had been a response from the French authorities to the consultation, adding that the Member States might require more time to react.

Anne Gautrais-Le Goff (DG MARE) responded that the French authorities had not expressed any major objections to the draft provisions. France would still have the opportunity to provide further comments.



- **Consideration of draft advice on the upcoming additional rules for traceability of fresh and frozen fishery and aquaculture products and marking of lots**

The Secretary General outlined the draft advice on “Upcoming Delegated Act on Additional Rules for Traceability of Fresh and Frozen Fishery and Aquaculture Products and Marking of Lots”, recalling that significant feedback was received from several members. The Secretary General encouraged members to proceed promptly with the consideration of the draft text, as the consultations of the Member States would take place in February 2025.

Anne Gautrais-Le Goff (DG MARE) informed that the Commission would not take a prescriptive approach on the traceability systems. Examples of standards could be provided in the preamble of the legal text to guide implementation.

- **Way forward**

The Secretary General proposed that, following an informal exchange with the most interested members, the draft advice would be circulated to the Working Group via an urgent written procedure, providing all members with the possibility to provide feedback. After reaching agreement, the text would be put forward to the Executive Committee for consideration and potential adoption.

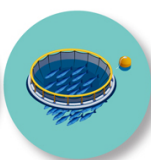
#### AOB

None.



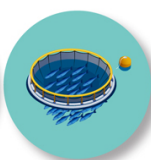
### Summary of action items

- Illegal, Unreported and Unregulated (IUU) Fishing
  - Draft advice on the fight against IUU fishing in the Outermost Regions to be developed with the Outermost Regions Advisory Council (CCRUP)
- Trade Agreements & Trade Policy Instruments
  - Following an informal exchange with the most interested members, draft advice on “Integration of sustainability criteria under the regime of Autonomous Tariff Quotas for certain fishery products” to be considered via urgent written procedure.
- Fisheries Control Regulation
  - Following an informal exchange with the most interested members, draft advice on “Upcoming Delegated Act on Additional Rules for Traceability of Fresh and Frozen Fishery and Aquaculture Products and Marking of Lots” to be considered via urgent written procedure.



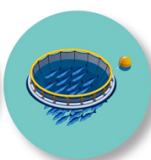
## Attendance List

Representative	Organisation	Role
Alessandro Manghisi	Aquaculture Stewardship Council (ASC)	Member
Alexandre Bonneau	SNCE	Member
Alonso Abreu Lozano	Asociación de Armadores Punta del Moral (OPP80)	Member
Amélie Laurent	Oceana	Member
Àngels Segura Unió	AECOC	Member
Anna Rokicka	Polish Association of Fish Processors (PSPR)	Member
Anne Gautrais-Le Goff	European Commission	Expert
Aodh O'Donnell	Irish Fish Producers Organisations (IFPO)	Member
Arthur Yon	FROM Nord	Member
Bianca Abbagnano	EUMOFA	Expert
Caroline Gamblin	PACT'ALIM	Member
Christine Absil	Good Fish Foundation	Member
Daniel Voces	Europêche	Member
Daniela Costa	Outermost Regions Advisory Council (CCRUP)	Observer
Dominic Rihan	Killybegs Fishermen's Organisation (KFO)	Member
Fabijan Hrvatin Peronja	Ribarska Zadruga Friška Riba	Member
Gaetane Le Breuil	European Fishmeal	Member
Garazi Rodríguez	APROMAR	Member
Gemma Laso	Inxenia	Observer
Gerd Heinen	European Commission	Expert
Giorgio Rimoldi	Unione Italiana Food / ANCIT	Member
Giuseppe Scordella	COPA-COGECA	Member
Guus Pastoor	EU Fish Processors and Traders Association (AIPCE) / European Federation of National Organizations of Importers and Exporters of Fish (CEP)	Member
Iñigo Azqueta Ruiz-Gallardón	ANFACO-CECOPESCA	Member
Isabel Alonzo Cabezas	Spain	Observer
Jacinta María Ramírez Ramírez	OPP72	Member





Representative	Organisation	Role
Janne Posti	Conxemar	Member
Jarek Zieliński	Polish Fish Producers Association (PFPA)	Member
Javier Ojeda	Federation of European Aquaculture Producers (FEAP)	Member
Jean-Marie Robert	Les Pêcheurs de Bretagne	Member
Jens Hons Mathiesen	Danish Seafood Association	Member
Jérémie Souben	FEDOPA	Member
Joanna Żurawska-Łagoda	Poland	Observer
João Pereira	FRUCOM	Member
Joe Emmanuel Seck	France	Observer
John Lynch	Irish South and East Fish Producers Organisation (ISEFPO)	Member
José Basilio Otero Rodríguez	Federación Nacional de Cofradías de Pescadores (FNCP)	Member
José Carlos Escalera Aguilar	FECOPESCA	Member
Juan Manuel Trujillo Castillo	ETF	Member
Juana Parada	OR.PA.GU.	Member
Julien Daudu	Environmental Justice Foundation	Member
Julien Lamothe	European Association of Fish Producers Organisations (EAPO) / ANOP	Member
Jules Danto	European Association of Fish Producers Organisations (EAPO)	Member
Justine Marrot	Aquaculture Advisory Council (AAC)	Observer
Justyna Radzewicz	Poland	Observer
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
Leonard Raghnaith	CRPM Guyane	Observer
María Luisa Álvarez Blanco	FEDEPESCA	Member
Mariano García García	Federación Andaluza de Cofradías de Pescadores	Member



Representative	Organisation	Role
Maximilian Schwarz	Market Advisory Council (MAC)	Secretariat
Mike Turenhout	Visfederatie	Member
Pablo Cadarso	CONXEMAR	Member
Patrick Murphy	Irish South & West Fish Producers Organisation	Member
Pawel Szatkowski	European Commission	Expert
Pedro Reis Santos	Market Advisory Council (MAC)	Secretariat
Pierre Commère	PACT'ALIM / Eurothon	Chair
Pim Visser	NOVA	Member
Poul Melgaard Jensen	Danish Seafood Association	Member
Pruska Singhapol	Environmental Justice Foundation	Member
Roberto Alonso	ANFACO-CECOPECA / FEICOPESCA	Member
Roger Aron	Territorial Community of French Guiana	Observer
Sarah Hautier	EuroCommerce	Member
Sergio López García	OPP7 Burela	Member
Sophie Leforestier	CRPM Guyane	Expert
Stefan Meyer	Bundesverband der deutschen Fischindustrie und des Fischgrosshandels e.V.	Member
Thibault Pivetta	European Molluscs' Producers Association (EMPA)	Member
Vanya Vulperhorst	Oceana	Member
Xavier Pires	ALIF	Member
Szilvia Mihalfy	Federation of European Aquaculture Producers (FEAP)	Member
Yannis Pelekanakis	HAPO	Member
Yves Reichling	FeedbackEU	Member

