

Study supporting the evaluation of the Landing Obligation

Market Advisory Council. Working Group 1: EU Production,
17 September 2025

MARE D3 – CFP & Structural Support, Policy Development and Coordination

Content

Background & Scope

Limitations & Results

First Reactions



Background & Scope

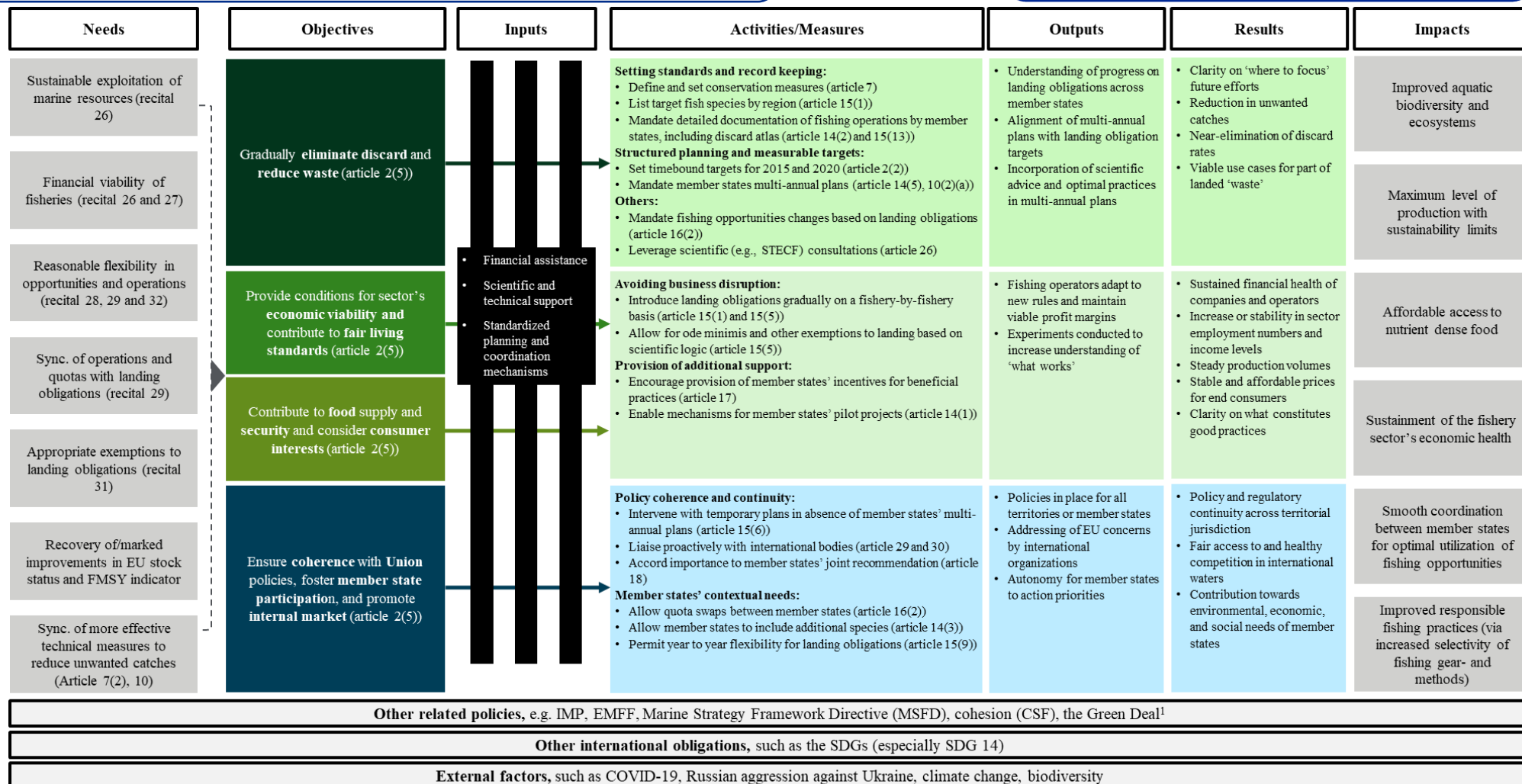
Why / When / How

- External study launched by the Commission (MARE/CINEA) in 2024.
- Objective: Gather evidence for an assessment on
 - How landing obligation has performed
 - How is working
 - Why it is performing as it does
- Study published 16 June 2025 https://cinea.ec.europa.eu/publications/digital-publications/study-supporting-evaluation-landing-obligation_en
- Study presented by authors 8 July 2025 https://cinea.ec.europa.eu/news-events/events/presentation-emfaf-study-supporting-evaluation-landing-obligation-2025-07-08_en
- EU Better Regulation method as it will feed into evaluation of CFP Regulation



Background & Scope

Intervention logic



Note: 1. Other relevant adoptions, e.g., Amending Regulation (EU) 2022/1278; The recitals and articles mentioned are from the Regulation (EU) No 1380/2013 of 11 December 2013 on the Common Fisheries Policy



Background & Scope

Evaluation criteria

Evaluation criteria	Key evaluation question
Effectiveness	To what extent was the landing obligation implemented effectively? To what extent did the landing obligation contribute to the objectives of the CFP?
Efficiency	To what extent has the landing obligation been implemented efficiently?
Relevance	To what extent is the landing obligation relevant to the needs of the target groups? To what extent is the intervention (landing obligation) still relevant? To what extent is the landing obligation relevant to European strategic objectives?
Coherence	To what extent is the landing obligation internally (within the EU) and externally coherent?
EU added value	To what extent could the identified outputs and results have been achieved without the landing obligation / EU intervention?
Complementarity	To what extent has the intervention proved complementary to other (Member States') interventions and initiatives in the field of fisheries management and conservation
Sustainability	If the landing obligation were to be removed, what might be the likely effects?



Background & Scope

Ev. Question Matrix

ANNEX 2 of the Study

Evaluation Criteria	Evaluation Question	Indicative judgement criteria	Indicators for evaluation	Data collection method
Effectiveness	To what extent was the landing obligation implemented effectively?	Extent to which expectations have been met, if not, the hindrance factors have been identified (compliance and implementation)	Presence and comprehensiveness (as per CFP) of member states' multi-annual plans and applicable compliance reports	Desk research or secondary data Case study
		Extent to which expectations have been met, if not, the hindrance factors have been identified (landing obligations contributed to each of the CFP objectives, specifically Article 2(5)(a))	Comparison of performance versus target for the gradual elimination of discards	E-survey
		Article 2(5)(a) = <i>The CFP shall, in particular: (a) gradually eliminate discards, on a case-by-case basis, taking into account the best available scientific advice, by avoiding and reducing, as far as possible, unwanted catches, and by gradually ensuring that catches are landed</i>		Descriptive statistics from FAMENET and EUROSTAT data
				Case study
				E-survey
				Interviews
		Extent to which expectations have been met, if not, the hindrance factors have been identified (the level of unwanted catches (<minimum conservation reference size catches or juveniles) in the fisheries)	Comparison of performance versus targets for unwanted catches including MCRS catches or juveniles	STECF FDI data descriptive statistics Case study E-survey

Background & Scope

Key research quest.

- Whether or not **discarding** of species has been gradually or is being eliminated
- Have **unwanted catches** been reduced as far as possible
- **If and why**, in certain cases, the intervention **has not worked**. What challenges Member States and industry experience with its implementation
- If the landing obligation **lacks full compliance and implementation because it is difficult to control**. Could the new provisions on control under the new EU Control Regulation facilitate this difficulty?
- Whether or not the intervention creates the **right positive incentives sufficiently for fishers to discontinue discarding**
- Is the design of the landing obligation applicable the same way in all the sea basins, accounting for **regional specificities**



Background & Scope

Methods



Background & Scope

What is / what isn't

IT IS

External study supporting
Evaluation

Source of information for
EC

Comprehensive evidence-
based assessment

IT IS NOT

Evaluation *per se*

Official EC position / only
source

Compliance / enforcement
assessment



Limitations & Results

Limitations

- Large number of **exemptions** available to fishers
- **Lack of EU wide data sources available** which include exemptions applied directly linked to the logbook reporting
- Member State **scientific data collection strategies** not at the scale of the landing obligation implementation
- **Natural annual variability**
- **Level of control and enforcement** at local and regional levels
- Quantitative or published Qualitative **information** for some (sub)indicators **lacking**
- **Subjectivity** of insights from stakeholder consultation



Limitations & Results

Overall Findings

- Landing Obligation has not reached its full potential / not implemented as originally designed.
- It has not contributed to the objective of gradually eliminate discards.
- Why:
 - *Disconnect between pilot study stage and level at which joint recommendations are made?*
 - *Low uptake and buy in at industry level together with ineffective enforcement?*
 - *Difficult to implement: lack of economic and / or technical feasibility?*
 - *High number of exemptions?*
 - *Lack of monitoring tools and data for analyses? ...*



Limitations & Results

Overall Findings

From a Market Perspective:

- *No motivation: extra workload, extra costs and no market (small fish)*
- *Potential market facing increased costs and logistical challenges:*
 - *lack of processing capacity and*
 - *limited market outlets*
- *LO did not contribute to other strategies like Farm to Fork: with targeted investments in value chains for previously discarded species, the LO could support sustainable food systems.*
- *Waste framework directive and SDG 12.3 reducing food losses: LO objective is coherent but the disposal of unwanted catch to land fill is not.*



Limitations & Results

Identified challenges

- Insufficient incentives for fishers to comply with landing all catches and not discarding
- Ineffective monitoring and enforcement tools
- Conflicts with maintaining the economic viability of fisheries due to the loss of commercially valuable catches when increasing selectivity
- Difficulties in further improving species and gear selectivity in certain fisheries



Limitations & Results

- Strengthen monitoring and enforcement
- Enhance gear selectivity
- Improve data collection and analysis
- Provide economic and operational support
- Foster collaboration and targeted interventions

Recommendations



Limitations & Results

Recommendations

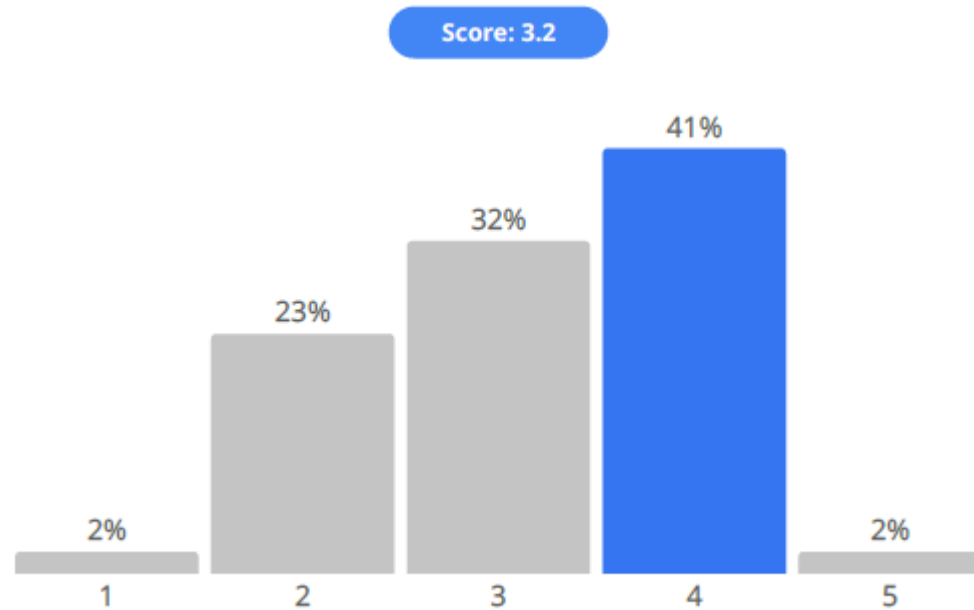
From a Market Perspective

- Better align LO with waste and food policies:
 - Stronger investments in processing infrastructure and innovation in byproduct valorisation.
 - More guidance for specific uses under “direct human consumption”
 - Cross DG dialogue (MARE-ENV)
- Support market development for unwanted catches:
 - New value chains (pet food, bio-based materials)
 - Public procurement for non-human consumption



First Reactions

Do you feel that the results presented today are aligned with your views on a range from 1 to 5 ?
(1- not at all and 5- fully)



slido

To the Study...

Very long to read

Time to digest it is needed

Too broad

Thank you



First Reactions

To the findings...

All efforts should
be put into
implementation
and enforcement

More regional
approach is
needed

Amend the LO
to make it
relevant to the
reality of EU
fisheries

Modifying the
LO should have
been the main
recommendation

It will not be
implemented
without
sanctions

Better incentives
to improve
selectivity are
needed

Potential role of
market
incentives
missing

All is about
money and cost
of implementing
LO



First Reactions

Next steps

- This will feed into the full evaluation of the CFP Regulation: we cannot prejudge the outcome of this full evaluation
- The study highlights the need for **continued dialogue and collaboration** between regulators, fishers and scientists



Thank you

MARE D3