

Working Group 1: EU Production

Minutes

Monday, 23 March 2026 (09:30 – 13:00 CEST)

Zoom

Interpretation in EN, ES, FR

Welcome from the Chair, Julien Lamothe

[Presentation](#)

Adoption of the agenda and of the last meeting's minutes (04.02.26): adopted.

Action points

- **State-of-play of the action points of the last meeting - information**
- Scientific, Technical, and Economic Committee for Fisheries:
 - Following the redrafting of the last paragraph by Europêche and WWF, draft advice on the Terms of Reference of the 2026 edition of the Annual Economic Report on the EU Fishing Fleet to be put forward to the Executive Committee for consideration and potential adoption.
 - Advice adopted on 5 February 2026.

EU Strategies for Islands and Coastal Communities

- **Presentation on the preparatory work of the upcoming communications by Commission representatives (MARE A4)**

[Presentation](#)

Manuel Pleguezuelo Alonso (DG MARE) informed that the call for evidence for the EU Strategy on Coastal Communities would be closed on 23 March 2026 – until then, 72 contributions had been received. Mr Pleguezuelo mentioned that, originally, the Commission planned to develop only one common strategy, but later there was a political decision to divide into two. The Strategy on Coastal Communities, to be developed by DG MARE, would cover the overall challenges, while the Strategy for Islands, to be developed by DG REGIO, would cover the specificities of insularity.

Mr Pleguezuelo explained that the initiative was foreseen in the mission letters of Executive Vice-President Raffaele Fitto and of Commissioner Costas Kadiris, which envisaged concrete deliverables to support coastal communities, develop new business models, and address the specific challenges faced by islands. The initiative was also linked to the European Ocean Pact, as support to coastal communities, islands, and the



Outermost Regions was one of the main priorities. The communication on coastal communities would have cover various topics, including resilience and adaptation, vibrant communities, and economic development. Both strategies were expected to be adopted in June 2026.

Mr Pleguezuelo further explained that the call for evidence lasted for four weeks. A dedicated interactive stakeholder session took place on 6 March 2026, as part of the European Ocean Days. Due to the cross-cutting nature of the challenges faced by coastal communities, internal consultations were ongoing with DG ENV, DG CLIMA, and DG REGIO. The Commission services were initiating the drafting phase, so that the communications could be adopted in mid-June 2026 and followed by a high-level event at the end of the Cypriot Presidency of the Council of the EU.

Mr Pleguezuelo emphasised that coastal territories are home to around 90 million people and represent a highly diverse set of geographies and cultures, offering strong potential but also facing acute challenges, including vulnerability to climate change, limited access to essential services, lack of affordable housing, ageing populations, economic dependence on a small number of activities, and difficulties experienced by some fishing and aquaculture communities. He recalled that, while the EU had long supported coastal areas through various sectoral and regional policies, this support remains fragmented, making it harder for Member States to implement coherent national approaches. As a result, a strategic EU framework was needed to align funds, initiatives and policies in a more coherent and integrated manner.

Mr Pleguezuelo, concerning the planned Strategy for Islands, outlined that the Treaty on the Functioning of the European Union provides the legal basis for measures to support territories with permanent geographic or demographic constraints. Despite the mentioned commonality, the EU's islands exhibit strong socio-economic diversity and, therefore, require tailored approaches. Significant funding from cohesion policy already supports islands in the current Multiannual Financial Framework, but the strategy would aim to provide a coordinated framework enabling Member States to better steer the programming and implementation of their National and Regional Partnership Plans. The initiative would focus on four areas: economic development and innovation, green transition and climate resilience, social cohesion and quality of life, and security and resilience.

Mr Pleguezuelo mentioned that a third related initiative, the Commission's communication on an EU Strategy for Outermost Regions, was expected to be adopted in May 2026. The three strategies were being developed in a complementary manner to avoid duplication.

- **Exchange of views**

Patrick Murphy (IS&WFPO) wanted to know whether the strategies would be particularly focused on the Fishing Local Action Groups. Mr Murphy also wanted to know whether the strategies would be redefining existing legislative framework and about the specific aims.



Margot Angibaud (Europêche) acknowledged the importance of the initiatives, as activities at sea play a central role in shaping coastal communities. Ms Angibaud recalled that various activities at sea were impacted by EU targets, such as on the establishment of marine protected areas and of offshore wind farms, and that these developments were leading to a shift in the identity of coastal communities. She argued that the strategy should secure the existing fishing communities, requesting more information on how this could be achieved.

Dominic Rihan (KFO) expressed doubts on the objectives of the strategies, highlighting that, under the Commission’s proposal for the next Multiannual Financial Framework, the funding for the fisheries sector was reduced to € 2 billion euros, while many actions were expected. Mr Rihan wanted to know how the strategy would contribute to additional funding for coastal communities. He also wondered how the strategy would address wind farms, which were financed via both public and private funding.

Pim Visser (NOVA) requested information on the definition of fisheries-dependent communities, which constituted a socio-economic qualification. Mr Visser also requested more information on the definition of “coastal communities” being used by the European Commission. He expressed agreement with Mr Rihan.

Manuel Pleguezuelo Alonso (DG MARE) recalled that the call for evidence would close that day, emphasising that it was open to all stakeholders. The call for evidence on the Islands Strategy would be open until 1 April 2026. Under the call for evidence, feedback was provided by several Fisheries Local Action Groups. In his view, these groups were a good example of local initiatives, and their role should be acknowledged.

Mr Pleguezuelo explained that the strategies aimed to guide public regional and local authorities, while also guiding EU support, including via funding. These strategies could help shape how the insularity and coastal elements were integrated in the next Multiannual Financial Framework. The Commission representative underscored that the identity and cultural heritage component would be referenced and protected, while also promoting economic diversification and opportunities for the younger generations. The connection to marine spatial planning would also be addressed. The issue of financing was being discussed across the various Commission service and also with the European Investment Bank, in order to reference the importance of diversification in the financing.

Mr Pleguezuelo clarified that, for the definition of “coastal communities”, DG MARE referred to, as a starting point, the definition used by Eurostat, which referenced local and administrative units with more than half of the surface located within 10km of the coastline. He stressed that the aimed was for the strategy to focus on the people, not only on public authorities.

Pier Salvador (COPA COGECA) argued that the opportunities provided by fisheries and aquaculture were not sufficiently highlighted. In his view, EU citizens and public authorities should be aware of the positive dimension of these activities, including both for the marine environment and economic-wise.



Patrick Murphy (IS&WFPO) requested more information on how the strategies would be applied in practice, including how these would be promoted among the coastal communities. Mr Murphy that there were conflicting measures by the EU, for example on the target of protection 30% of the ocean with marine protected areas. He drew attention to the complexities faced by the sector, exemplifying that, for an established business, a renewal of an aquaculture license could take five years to complete.

Manuel Pleguezuelo Alonso (DG MARE) emphasised that the aim was to set, in line with the subsidiarity principle, a strategic framework on where the EU can provide support. The strategies would indicate the EU policies and funds, particularly under the next Multiannual Financial Framework, that address the issues faced by coastal and island communities. The strategies would also reference pilot experiences and funding from the European Investment Bank. The strategies would aim to guide the Member States, the local and regional authorities, together with the stakeholders, on how to reach the three previously mentioned objectives, under a cooperative framework. Furthermore, the strategies would take into account the framework of the European Ocean Pact.

- **Way forward**

The Chair encouraged the members to respond, in an individual capacity, to the call for evidence. The Chair suggested that, following the adoption of the communication by the European Commission, the strategies could be addressed again in a future meeting.

The Secretary General suggested the circulation of a questionnaire to the members to collect inputs, which would serve as a basis for the development of draft advice, via an urgent written procedure. The aim should be to finalise the advice during the month of April 2026, so that it could be taken into account by DG MARE in the drafting of the communication.

Energy Transition Partnership

- **Update on recent developments and market-related aspects by Janne Posti (Support Group Coordinator for the Processing Industry, Energy Transition Partnership)**

Presentation

Janne Posti (Conxemar) recalled that the Energy Transition Partnership was an initiative of the European Commission intended to support the decarbonisation of the fisheries and aquaculture sector and to guide the transition towards sustainable energy use. Ten support groups were created, representing the main stakeholders. These groups had identified challenges and were developing recommendations for the Commission's roadmap, which was under preparation.

Mr Posti explained that, over the past year, the support group aimed to highlight that the processing and trading sector was the link between producers and market, playing an important role in the energy transition. The mentioned approach was in line with the advice adopted by the MAC in 2024 on the energy transition



partnership, which called for the entire value chain to be considered. As Support Group Coordinator, he attended various related events, including the 2025 European Maritime Day, various workshops, a high-level seminar, and several meetings with the European Commission. The support group met four times to identify bottlenecks and solutions. In that work, he prepared an EU-wide survey targeting the processing sector.

Mr Posti outlined the main challenges and enablers for the processing sector. Financial investment barriers were the main challenge, as access to funding remained limited and most support did not target their segment of the value chain, making investments difficult. There was administrative burden resulting from a fragmented policy framework, which created uncertainty. While solutions existed, significant innovation gaps persisted, requiring more research and pilot projects. There were workforce shortages in both the catching and processing sectors. Furthermore, very few programmes supported the energy transition.

Ms Posti highlighted the sector's strong dependence on fossil fuels and the lack of available data, which made it difficult to monitor energy use and efficiency. In his view, the next Multiannual Financial Framework had limited focus on the fisheries sector. While it could serve as a starting point, it would not be sufficient to cover the scale of the transition. Therefore, there was a need for private investment and risk-sharing tools as well as for a funding framework more inclusive of the processing sector. For the energy transition in the processing sector, it would be necessary to have a business environment able to absorb risks. He outlined the key enablers for the energy transition, including the need for more targeted support, expanded funding, public-private partnerships, and clear regulations. In his view, there was a need for support for technological innovation, underlining that the sharing of knowledge was essential, as there were similarities with other industrial sectors.

Mr Posti explained that the support group had launched an EU-wide survey because companies themselves knew best how to address the topics related to energy transition. Most responses came from France and Spain, though the number remained limited. The results provided a good picture of the sector's situation. Companies were already adopting energy-efficient technologies and access to renewable energy, mainly solar and wind, was already good. Further adoption of energy transition solutions would require technical support. He highlighted various persistent challenges, including workforce skill gaps, limited transport infrastructure for energy, complex regulation, and lack of financial support. In his view, companies needed harmonised standards and tailored financial mechanisms, as operators were willing to participate in and adapt to the transition. He added that the sector remained committed to the process, while the transition required significant financial and policy support.

Mr Posti argued that, moving forward, the energy transition could only be achieved through a coordinated approach. Recently, he had participated in a follow-up meeting with all support group coordinators. The Commission was developing the Energy Transition Partnership Roadmap, which was expected to be published in the third quarter of the year. The support groups would be contributing to the development of the roadmap. He mentioned that a call for the renewal of the members of the support group had been



launched, expressing hope that there would be significant interest among stakeholders. Further discussions with the trading and processor sector were planned for April 2026.

- **Exchange of views**

The Chair highlighted that the initiative on the energy transition partnership was still ongoing. The second phase would focus on the adoption of the Energy Transition Roadmap. In his view, the integration of the processing sector in the Energy Transition Partnership had been important, aligning with the advice previously adopted by the MAC.

EU Aquaculture Campaign

- **Update on the outcomes of the campaign by Charlotte Gugenheim and Alessandra Portis (MARE E2)**

Presentation

Charlotte Gugenheim (DG MARE) provided an update on the outcomes of the EU Aquaculture Campaign. Ms Gugenheim recalled that the campaign was launched in March 2025 as an EU-wide communication initiative, in cooperation with the Member States. The main objective was to increase awareness, understanding and acceptance of the importance of aquaculture across the EU by showcasing the dedication of aquaculture producers and their commitment to sustainable aquaculture and high-quality products.

Ms Gugenheim outlined the activities carried out at EU level, highlighting that the campaign focused mainly on social media. The launch event, which took place in Brussels with Commissioner Kadis, counted on the involvement of the operators. The content of the campaign was primarily disseminated on Meta platforms, such as Instagram and Facebook, presenting EU aquaculture and production together with the EU's aquaculture guidelines. The campaign generated a high number of impressions and views, indicating significant engagement. The Commission representative provided examples of the assets produced, which were available in all EU languages. She recalled that, to ensure visibility on social media, paid promotion was necessary. A first promotional wave reached 7.7 million impressions and 5.5 million engagement interactions, while a second wave, which focused on short reels, reached 5.4 million impressions and 1.92 million engagement interactions.

Ms Gugenheim explained that influencers were invited to visit aquaculture farms, where they had been welcomed by producers. Ten influencers had taken part and had created content that was less institutional in tone, generating further impressions and interactions. A campaign website, available in all EU languages, had also been developed, giving basic facts about EU aquaculture, which remained available. The website received a reasonable number of visits, mostly via mobile devices, consistent with the social media-linked traffic. The countries most reached had been France, Spain, Greece and Italy.

Ms Gugenheim provided an overview of the activities supporting the campaign across Member States. 20 Member States adopted the campaign (74% adoption rate), while seven did not. Member States organised



events and used the material available, adapting the assets to create their own communication products. National communication had also primarily taken place on social media. Belgium had led in reach and engagement, including through a post from “Lekker van bij ons” highlighting mussel producers. Spain had generated a very high volume of impressions due to the promotion of the video in Spanish. Greece had produced the largest number of posts.

Ms Gugenheim informed that, in total, 27 events were organised, ranging from major conferences to smaller formats. The campaign had achieved good visibility through institutional online media in several countries. She provided examples of national adaptations of the campaign assets, including a Spanish video with 2.3 million views, as well as examples from Estonia and Lithuania, where Member States had used the provided video template. The template focused on personal stories from producers. A template for posters had also been provided, and some Member States had established national ambassadors. An example of adaptation was also presented from Athens, where the campaign was promoted in the metro.

Ms Gugenheim informed that 17 Member States had replied to a survey on the campaign. All had provided positive feedback on the quality of the campaign, with social media images and ambassador photos and videos being the most used materials due to their clear messages and high quality. Less positive comments had been received, with a request for more localised content, the involvement of influencers in a larger number of countries, wider representation of EU aquaculture, and more diverse visual options. Several Member States had expressed a preference for material more tailored to local realities rather than focusing solely on the advantages of EU aquaculture.

Ms Gugenheim emphasised that the campaign was designed with reusable assets, with no date attached, allowing continued use in all EU languages. While the sharing platform had been dismantled, the files remained accessible through DG MARE. DG MARE would also continue to collect further feedback. She recalled that, as part of the European Ocean Pact, in 2027, a campaign on aquatic foods would be launched.

- **Exchange of views**

Laura Harpøth (EFFOP) wanted to know why some Member States chose not to participate in the campaign.

Charlotte Gugenheim (DG MARE) responded that some Member States, such as Slovenia, indicated that the timeframe was not ideal. In other cases, it was due to political reasons, as the initiative was not considered to be a high political priority.

Janne Posti (Conxemar) wondered whether the campaign results would be linked to data on consumer behaviour and on the impact on market sales, including market share and sales volume.

Charlotte Gugenheim (DG MARE) explained that the objective of the campaign was not necessarily to increase the consumption of aquaculture products, but to change the perception on the sector. Ms Gugenheim agreed that it would be relevant to follow-up, but that DG MARE did not have the means to collect the mentioned data, as it would require a baseline prior to the campaign. At the national level, it would be easier for authorities, through market intelligence, to follow-up. From the Commission’s side, the main reference on consumption patterns was the periodical Eurobarometer survey.



Pier Salvador (COPA COGECA) expressed agreement with Mr Posti. Mr Salvador argued that the campaign did not sufficiently highlight that 70% of aquaculture undertakings are small and family owned. The campaign should have illustrated small producers and small-scale aquaculture facilities.

Charlotte Gugenheim (DG MARE) acknowledged the importance of emphasising that aquaculture undertakings are generally small and family owned, underscoring that it had been an integral part of the campaign. Ms Gugenheim emphasised that the campaign relied extensively on testimonies from family-run aquaculture companies. The videos highlighted multiple aquaculture farms across the EU operators by small family businesses.

Patrick Murphy (IS&WFPO) requested more information on how the European Commission reached out to the Member States and about the lessons learnt. Mr Murphy exemplified that, in Ireland, there were major difficulties in the issuing of aquaculture licenses.

Charlotte Gugenheim (DG MARE) explained that a dedicated task force, which included representatives from the Member States, was established to develop the main objectives of the campaign. The main lesson was the importance of involving communication specialists at an earlier stage. Ms Gugenheim informed that one-to-one meetings took place with each Member State, which resulted in successful exchanges. She highlighted that Ireland was undertaking several initiatives on social licensing, for example through EU-funded projects to bring aquaculture into schools.

Patrick Murphy (IS&WFPO) expressed disagreement about the progress in Ireland, since the issuing of aquaculture licenses took up to five years. In his view, under such conditions, it was difficult to promote aquaculture as a viable economic activity. He called for further collaboration across the various Member States, including on the training of aquaculture professionals.

The Chair requested more information, including corresponding calendar, for the 2027 campaign for aquatic products. The Chair also requested information on how the MAC could contribute.

Charlotte Gugenheim (DG MARE) responded that internal discussions were still ongoing. DG MARE would aim for an overarching message. Ms Gugenheim expressed availability to present the developments of the campaign to the MAC, at a later stage.

The Chair expressed availability from the MAC to discuss internally about the priorities and main messages of the upcoming campaign. The issue could be addressed in more detail at the September 2026 meetings.

European Market Observatory for Fisheries and Aquaculture

- **Demonstration of the website of EUMOFA by Christophe Vande Weyer (MARE A4) and Francesco Guglielmo Ruspantini (EUMOFA)**

Christophe Vande Weyer (DG MARE) explained that the new website of EUMOFA was not operational yet, as internal validations were ongoing, but would become online soon. Mr Vande Weyer informed that, following the launch, a dedicated session for stakeholders would be organised.



Francesco Guglielmo Ruspantini (EUMOFA) outlined the main changes, including an updated top bar and menu, a carousel on the homepage, EUMOFA studies accessible by scrolling down, and the latest news further below. The footer would contain the information usually found on Commission websites, including cookie-related elements. Mr Ruspantini emphasised that the redesign had been guided by a key principle: users should be able to reach any information within a maximum of three clicks.

Mr Ruspantini explained that, under the publications section, users could click on studies to access a short introduction and download the corresponding PDF. All documents had been designed to be available in HTML format, with a left-hand menu allowing navigation within the content. Under the import–export data section, users would be able to visualise trade flows with data extending to 2026 and select countries and Combined Nomenclature codes. The cross-tab could be expanded, allowing data to be displayed in chart format. Users could download bulk data in CSV files. Metadata and correlation features would also be available.

Mr Ruspantini further explained the profile of each country would be accessible in a specific section. Species profiles would also be available on the website. He provided an overview of the news and upcoming events sections, the translation options, and the search engine based on EC Search 2.0. He clarified that the search engine used a centralised search function that function in conjunction with other websites of the European Commission, allowing the retrieval of news articles and documents from a wider domain.

- **Exchange of views**

Garazi Rodríguez (APROMAR) emphasised the usefulness of the data from EUMOFA and from Eurostat for her organisation’s report on aquaculture in Spain. Ms Rodríguez asked about the possibility of short trainings being organised. She also asked about a potential contact point for information requests.

Francesco Guglielmo Ruspantini (EUMOFA) expressed availability to assist and answer questions.

Christophe Vande Weyer (DG MARE) informed that DG MARE planned to proceed with the organisation of workshops, including both general and sector-specific ones, to explain how to use the website and access the corresponding data and studies.

Margot Angibaud (Europêche) requested information on the anonymisation of data, in accordance with the General Data Protection Regulation, particularly in the context of the number of data entries and the corresponding shipowners.

Francesco Guglielmo Ruspantini (EUMOFA) explained that, when uploading data, the system removed confidential data, including through the aggregation of data for several parameters. To ensure compliance with data protection rules, confidential data was not made available on the website.

Christophe Vande Weyer (DG MARE) confirmed that EUMOFA must follow the legislation on non-disclosure and non-dissemination of confidential data, which also applied to data on landings and first sales. Since the



described data could potentially allow the identification of operators, there were procedures for data aggregation, ensuring the anonymity of producers.

Margot Angibaud (Europêche) wanted to know how the level of aggregation was determined.

Christophe Vande Weyer (DG MARE) responded that the level of aggregation was determined together with the national authorities, so that the economic operators cannot be identified. The situation varied in accordance with the fishing practices and corresponding structural risks. He expressed availability to share more details on the aggregation practices.

Thibault Pivetta (EMPA) welcomed the integration of the search engine with other websites, which, in his view, should include the website of the European Aquaculture Technology and Innovation Platform. Mr Pivetta expressed interest in the organisation of webinars, recalling that the Aquaculture Advisory Council periodically organised webinars on various topics.

Francesco Guglielmo Ruspantini (EUMOFA) responded that the search engine functioned as a repository. Documents were made available via an application programming interface. If content from another website failed to appear, it meant that there was an issue on the other website, not on EUMOFA's.

Mike Turenhout (Visfederatie) complimented the update to the website. Mr Turenhout wanted to know whether data on value and volumes would be based on Whole Fish Equivalent. He also wanted to know whether trade data would be available in real time. He expressed support for the organisation of webinars, particularly sector-specific ones.

Francesco Guglielmo Ruspantini (EUMOFA) expressed willingness to organise multiple webinars. Mr Ruspantini that data based on Whole Fish Equivalent was not available but could potentially be added. He took the opportunity to inform that the website would include a private area for users, which would allow customised content.

Dominic Rihan (KFO) agreed with Mr Turenhout on the usefulness of the update. Mr Rihan asked about the potential cross-referencing of EUMOFA data with economic data from the Joint Research Centre, to avoid inconsistencies.

Alessandro Pititto (EUMOFA) responded that some datasets came from Eurostat, while others came from other European Commission sources. Some datasets, for example on trade with non-EU partners, were sourced from private data providers. Weekly data on first sales was made available directly by the Member States. Mr Pititto emphasised that, in cases of unusual data, there was interaction with the data providers. He added that the datasets of the Joint Research Centre different from the EUMOFA ones.

- **Presentation of the 2025 edition of the “Fishmeal and fish oil study” by EUMOFA experts**

[Presentation](#)

Jan Erik Øksenvåg (EUMOFA) presented the 2025 edition of the “Fishmeal and Fish Oil Study”. Mr Øksenvåg recalled that the work dated back to 2018. Originally, EUMOFA published a case study. From 2020, EUMOFA



followed with the publication of a biannual study. He emphasised that both fishmeal and fish oil were key components in aquaculture feed, while also being relevant for direct human consumption. Both products form part of the broader blue bioeconomy, generating value for by-products from marine production. In the preparation of the study, the team referenced trade data of the European Commission (COMEX), data from the main producers, and data from governmental sources in South America. The latest edition was published in the Summer of 2025, while the next one was scheduled for 2027.

Lars Erik Flatøy (EUMOFA) highlighted that, since 2002, global landings of fish, shellfish and crustaceans had fluctuated between 90 and 95 million tonnes. Around 20 million tonnes were destined for non-food uses, of which approximately 15 million tonnes went to fishmeal and fish oil production. Fishmeal and fish oil production showed a slight increase in recent years, mainly due to improved utilisation of rest raw materials, although annual variations depended on catches and quotas. In terms of producing countries, Peru remained the main global supplier of fishmeal, while also dominating fish oil production, accounting for 10 to 15% of the global volume. Peru was followed by significant contributions from Vietnam and Chile. In the case of Chile, production included both anchovy and salmon oil.

Mr Flatøy explained that one-third of global fishmeal production originated from by-products, such as trimmings, offcuts and processing residues from whitefish. For fish oil, around half of global production came from by-products and the remainder from whole catch. The EUMOFA expert provided an overview of the Peruvian fishmeal prices, highlighting that Peru accounted for around 20% of global production, playing a price-setting role. During reporting period, a decrease in Peruvian fisheries caused a significant price increase, especially for fish oil. Since then, the prices had normalised.

Mr Flatøy outlined that, in terms of global fishmeal use by sector, the utilisation of fishmeal had increased in aquaculture. Use in poultry and pig production declined, reflecting availability constraints and price levels. In the case of fish oil use, there was an increasing effort to find alternative sources for aquaculture feed, reflecting price pressures and supply availability. At the same time, fish oil remained important for direct human consumption and for industrial uses, including the use of lower-grade oils derived from by-products for energy production

Mr Flatøy recalled that the total EU landings had decreased from nearly 5 million tonnes to 3.2 million tonnes in 2023, with industrial uses representing less than 1 million tonnes and accounting for no more than 3 % of total value. Denmark remained the main contributor to fishmeal and fish oil landings in the EU, followed by Sweden and Finland. The EU industrial species were led by sandeel, although quotas were now very limited or close to zero in some areas. Catches of sprat and blue whiting had remained stable, although quota decreases for blue whiting would have an impact. Supplies from other species remained limited.

Mr Flatøy mentioned that first-sale prices in the EU showed that herring prices were affected when destined for fishmeal and fish oil use. In terms of EU fishmeal production figures, the inclusion of rest raw materials had helped compensate for decreases in overall production. Denmark was the leading producer, followed by



Spain and Sweden. For fish oil production, Denmark, Spain, Germany, Sweden and Poland were the main contributors. The EUMOFA expert highlighted that EU prices for fishmeal and fish oil followed Peruvian prices closely. The EU remained dependent on imports for fishmeal, although the trade balance shifted when local production capacity increased, such as through higher sandeel quotas. Concerning fish oil trade balance and import flows, he added that, historically, Peru was an important supplier for fishmeal, although, more recently, volumes had been redirected to Asia.

Mr Flatøy provided an overview of the outlook of the sector. No significant increase in capture volumes was expected. Future availability would depend on better use of by-products, improvements in utilisation rates, and alternative raw materials. Climate change was expected to affect stock distribution, growth rates, catch stability, creating uncertainty. Overfishing risks for certain small pelagic species, such as anchovy and sardine, could also create challenges. Strong demand was expected to continue from aquaculture, pet food, and omega-3 industries. Therefore, innovation, better by-product utilisation, and new protein sources would be essential to support the long-term development of the sector.

- **Exchange of views**

Margot Angibaud (Europêche) recalled that, according to the presentation, there were 90 million tonnes of landings, of which 20 million tonnes were for non-food uses and 15 million tonnes were for fishmeal and fish oil. Nevertheless, in the case of global production, the product volumes were based on the 50 million tonnes of raw material. In her view, these figures were not directly comparable, since there were differing supply sources.

AOB

None.



Summary of action items

- EU Strategies for Islands and Coastal Communities
 - Secretariat to circulate a questionnaire to the members to collect inputs, which will serve as basis for the development, via an urgent written procedure, of draft advice, to be finalised during the month of April 2026.

- Multiannual Financial Framework
 - Secretariat to request, via email message, in advance of the June 2026 meeting, further information from DG MARE on the proposed budget expenditure tracking and performance framework.

- EU Aquaculture Campaign
 - Agenda point on the development of the 2027 campaign for aquatic foods to be scheduled under the draft agenda of the September 2026 meeting.



Attendance list

Representative	Organisation	Role
Adrien Simonnet	UMF	Member
Alen Lovrinov	Production Organization Omega 3	Member
Alessandra Portis	European Commission	Expert
Alessandro Manghisi	Aquaculture Stewardship Council (ASC)	Member
Alessandro Pititto	EUMOFA	Expert
Ana Peralta Baptista	European Commission	Expert
Andrea Fabris	Associazione Piscicoltori Italiani (API)	Member
Angeles Longa	EMPA	Member
Anna Rokicka	Polish Association of Fish Processors	Member
Antoine Marie Galichon	European Parliament	Observer
Aodh O'Donnell	Irish Fish Producers Organisation (IFPO)	Member
Arthur Yon	FROM Nord	Member
Aurore Laignelot	European Parliament	Observer
Bertrand Charron	Aquaculture Stewardship Council (ASC)	Member
Charlotte Gugenheim	European Commission	Expert
Chever Tanguy	EUMOFA	Expert
Chloé Pocheau	South Western Waters Advisory Council (SWWAC)	Observer
Christine Absil	Good Fish Foundation	Member
Christophe Vande Weyer	European Commission	Expert
Claudio Pedroni	Associazione Piscicoltori Italiani (API)	Member
Clémence Robert	France	Observer



Representative	Organisation	Role
Daniel Voces de Onaindi	Europêche	Member
Dominic Rihan	Killybegs Fishermen's Organisation	Member
Emiel Brouckaert	EAPO	Member
Francesco Guglielmo Ruspantini	EUMOFA	Expert
Gerd Heinen	European Commission	Expert
Grace Howe	The Nature Conservancy (TNC)	Member
Gunn Strandheim	EUMOFA	Expert
Hidde Politiek	European Commission	Expert
Iñigo Azqueta	ANFACO-CYTMA	Member
Ioannis Pelekanakis	HAPO	Member
Jacob Armstrong	WWF	Member
Jan Erik Øksenvåg	EUMOFA	Expert
Janne Posti	CONXEMAR	Member
Javier Ojeda	FEAP	Member
Jean-Marie Robert	Les Pêcheurs de Bretagne PO	Member
Jens Høj Mathiesen	Danish Seafood Association	Member
Jérémie Souben	FEDOPA	Member
João Pereira	FRUCOM	Member
John Lynch	Irish South and East Fish Producers Organisation	Member
José Basilio Otero Rodríguez	Federación Nacional de Cofradías de Pescadores	Member
Josselyn Dupré	France	Observer
Jules Danto	EAPO	Member



Representative	Organisation	Role
Julien Lamothe	EAPO	Chair
Katarina Sipic	Seafood Europe	Member
Lars Erik Flatøy	EUMOFA	Expert
Laura Harpøth Espensen	EFFOP - Marine Nutrients Europe	Member
Laure Guillevic	WWF	Member
Linda Zanki Duvnjak	RZ Friška Riba P.O.	Member
Linne Verhoeven	Seafood Europe	Member
Manuel Pleguezuelo Alonso	European Commission	Expert
Margot Angibaud	Europêche	Member
María Luisa Álvarez Blanco	FEDEPESCA	Member
Marine Cusa	Oceana	Member
Matthew Gréant	Environmental Justice Foundation (EJF)	Member
Mike Turenhout	Visfederatie	Member
Nicolás Fernández	OPP72	Member
Patrick Murphy	Irish South & West Fish Producers Organisation	Member
Pedro Hernández Saez	CARBOPECA OPP 66	Member
Pedro Luis Casado López	Asociación de Armadores de Punta del Moral	Member
Pedro Reis Santos	Market Advisory Council (MAC)	Secretariat
Pier Salvador	COPA COGECA	Member
Pim Visser	NOVA	Member
Poul Jensen	Danish Seafood Association	Member
Roberto Alonso	ANFACO-CYTMA	Member



Representative	Organisation	Role
Sergio López García	OPP Puerto de Burela	Member
Stefan Meyer	Fischverband	Member
Tamas Eisenbeck	Seafood Europe	Member
Thibault PIVETTA	EMPA	Member
Thomas Kruse	Danish Pelagic Producer Organisation	Member
VALENTINA SANNINO	EUMOFA	Expert
Veerle Campens	Belgium	Observer
Violaine De Neef	Market Advisory Council (MAC)	Secretariat
Yobana Bermúdez	Seafood Europe	Member

