

## Working Group 1: EU Production

### Minutes

Tuesday, 25 January 2022 (10:00 – 13:30 CET)

Zoom (Online)

Interpretation in EN, ES, FR

#### Welcome from the Chair, Sean O'Donoghue

Click [here](#) to access the Chair's presentation.

**Adoption of draft agenda and of the last meeting minutes (17.09.21):** adopted

#### Action points of the last meeting

- **State-of-play of the decision made during the last meeting - information**
- Marketing Standards:
  - Draft advice on incorporation of sustainability aspects in the marketing standards framework to be put forward to the Executive Committee for adoption through written procedure
    - Adoption by the Executive Committee: 15 October 2021
    - Reply from the European Commission: 12 November 2021
- Joint MAC/NWWAC/NSAC Focus Group on Brown Crab:
  - Draft advice on production and marketing of brown crab in the EU to be put forward to the Executive Committee for adoption through written procedure
    - Adoption by the Executive Committee: 8 October 2021
    - Reply from the European Commission: 16 November
- Annual Economic Report on the EU Fishing Fleet:
  - Presentation of STECF 2021 Annual Report to be scheduled for January meeting
    - Agenda item scheduled (11:30 CET)

#### Strategic Guidelines for Sustainable and Competitive EU Aquaculture

- **Presentation of strategic guidelines by Commission representative**

Click [here](#) to access the presentation.

Emilia Gargallo Gonzalez (DG MARE) explained that the new “strategic guidelines for a more sustainable and competitive EU aquaculture for the period 2021 to 2030” were adopted in May 2021. The guidelines were reviewed in close contact with experts from the Member States, the Aquaculture Advisory Council, and a public consultation. Aquaculture policy is not an exclusive competence of the EU. Aquaculture needs to comply with EU legislation on public and animal health, environmental



protection, and the placing of products in the market. Beyond that, the regulation of EU aquaculture is largely a competence of the Member States. The Common Fisheries Policy (CFP) established objectives for a sustainable development of aquaculture, recognising value for food security, reducing pressure on fisheries stocks, and providing employment and economic development. According to the CFP Regulation, the Commission must adopt guidelines for a strategic coordination of actions on aquaculture in the EU (see art. 34). Member States adopt multiannual strategic plans for aquaculture. The Commission maintains an open method of coordination with the Member States, in order to exchange best practices and information. In terms of funding, there is support under the operational programmes of EMFAF 2021-2027.

The European Green Deal provides a greater focus on aquaculture, it recognises the role of aquaculture in the decarbonisation of the EU economy. The Farm to Fork Strategy states that farmed fish and seafood generate a lower carbon footprint than animal production on land and that the shift to sustainable fish and seafood production must be accelerated. The Strategy announces targets to increase organic aquaculture and to reduce antimicrobial use. It announced a dedicated strategy for the development of the algae sector as an alternative protein, which is expected to be published later in the year. The aquaculture sector also has relevance in terms of ecosystem and biodiversity services. The aquaculture sector suffered with the COVID-19 pandemic. The disruption of the supply chain changed the way that food security is addressed. There was a renewed attention to local production and short-supply circuits. In this context, some producers developed systems of direct sales to the consumer. POs gained the acknowledgement of their key role in the value chain.

The key objectives of the new guidelines are to develop a more sustainable and competitive sector in the period of 2021-2030. It looks into growth, sustainability, resilience and competitiveness. It consolidates lessons learnt and aims to ensure that aquaculture meets social demands. Taking into account limited resources, the goal is to maximise the impact on performance. The specific horizontal objectives are the following: building resilience and competitiveness; participating in the green transition; ensuring social acceptance and information to the consumer; and increasing knowledge and innovation. The guidelines identify 13 different areas of work around the mentioned four objectives.

In relation to areas of work, Ms Gargallo highlighted the building of competitiveness and resilience, which includes access to space and water (spatial planning, definition of areas suitable for aquaculture), regulatory and administrative framework (streamlining regulation and procedures, coordination of relevant agencies and stakeholders), animal health and public health (prevention, good husbandry practices, research), climate change (adaptation strategy, promote mitigation services), producer and market organisation (promote Producer Organisation and inter-branch organisations), control (traceability along the value chain), diversification and adding value (new species, methods and product, product diversification).

Ms Gargallo underscored that POs are a useful tool for collective actions and assist the integration of actors in the value chain. POs are not sufficiently exploited. The COVID-19 pandemic demonstrated the benefits of POs. The establishment of POs continues to be encouraged.



Guidelines also encourage diversification. Currently 70% of aquaculture production is concentrated in four Member States and with a focus on a reduced number of species. Processing and packaging are also very important to meet the wishes of young consumers, including the development of ready-to-use products. The Commission is looking into quality labels and geographical indications to help differentiate products.

On participating in the green transition, there is environmental performance (implementation of EU legislation, mitigation different types of impacts and promoting low impact aquaculture and aquaculture offering ecosystem services), and animal welfare (good practices on fish welfare, research and innovation, knowledge and skills). On social acceptance and consumer information, there must be communication on EU aquaculture (information to citizens and consumers on how aquaculture is done in the EU and benefits – mix of tools), integration in local economies (early involvement of local stakeholders, synergies with other economic activities), data and monitoring (streamlining reporting and extending scope). On knowledge and innovation, cooperation, dissemination of results, synergies, attracting investment to innovation, and skills are covered.

As for next steps, Ms Gargallo explained that there is political support, but stakeholder support is needed. The Commission will establish an assistance mechanism, in order to compile best practices and provide technical support. There will be an online platform. The Commission is preparing to launch a communication campaign, which has been welcomed by Member States. Member States are also reviewing their national plans, in line with the strategic guidelines. The annex of the guidelines lists specific actions for the Commission, the Member States, and the Aquaculture Advisory Council. The Commission representative encouraged members to watch the recording of the virtual stakeholders' conference that took place on 27 May 2021.

- **Exchange of views & way forward**

The Chair encouraged members to express their views, in the context of the strategic guidelines, on the role of the MAC, particularly on the highlighted market issues, while also respecting the role of the Aquaculture Advisory Council.

Bruno Guillaumie (EMPA) wanted to know if the Commission was developing indicators to assess the development of the aquaculture sector, for example on the number of enterprises in the market. Mr Guillaumie argued that the COVID-19 pandemic demonstrated the need for further analysis of distribution circuits, particularly difficulties in rural areas. Distribution should not be only focused on littoral areas and large metropolitan centres. The MAC should also consider issues such as long-distance and online sales.

Wouter van Zandbrink (Dutch Mussel Traders Association) recalled that, the previous month, the European Parliament's Fisheries Committee adopted a report on the topic, highlighting the significant number of imports of fish and shellfish. The Fisheries Committee emphasised the importance of promoting the consumption of EU aquaculture products. Mr van Zanbrink underscored the importance of short distribution lines to reach the consumers. The MAC should study the issues raised in the Fisheries Committee's report, in order to provide advice to the European Commission.



Guus Pastoor (Visfederatie) wondered about much investigation took place concerning the market. In the aquaculture sector, there is integration of enterprises and the establishment of larger companies. There are successful products, such as salmon, and new ones, such as kingfish. The shellfish sector is also successful. Mr Pastoor further wondered about how aquaculture can be well connected to processors and traders. Logistical systems are required for the product to reach the consumer, which already exist. If available in the supermarket and presented in the correct format, consumers pick up on new products very easily.

Emilia Gargallo Gonzalez (DG MARE) responded that the EU aquaculture sector is not yet a very developed market. The strategic guidelines promote the development of the sector, while taking into account national competences. In response to Mr Guillaumie's intervention, Mr Gargallo highlighted the stagnation in the aquaculture sector. The Commission would like for the market to grow significantly. Indicators are not yet identified. There was significant support from the European Parliament, the Committee of the Regions, the European Economic and Social Committee, the Aquaculture Advisory Council, and stakeholders in general.

In relation to logistics, Ms Gargallo stated that it a topic that can be studied. Online selling is a possibility. In order to promote a higher demand, the Commission encourages quality labels and geographical indications. The Commission is also looking at promotion tools, including the EU-wide campaign. The Commission must counter the existing perception amongst consumers that wild caught products are better than aquaculture products.

In relation to the impact of the COVID-19 pandemic, data has shown that the organic sector was not as affected as the traditional one. Consumers of organic products are willing to pay a higher price. Therefore, the Commission encourages further organic production.

Agnieszka Korbel (WWF) wanted to know how the new horizontal objectives would be reflected in the strategic plans adopted by the Member States, particularly whether the Commission would verify the plans to ensure that the objectives are accounted for. Ms Korbel also wanted to know if there was a link between these and the 2021-2027 financial support, namely as a condition.

Emilia Gargallo Gonzalez (DG MARE) emphasised that the strategic guidelines were developed in collaboration with the Member States' experts. The Commission expects that the Member States will take into account the strategic guidelines, but it is a competence of the Member States. The Commission invited Member States to share their strategic plans for review. For those that have done it, the Commission has provided their comments on the specific plans, it is for the Member States to decide to take them into consideration. Concerning the link with the funding, funding must be in line with the strategic plans. The Commission only approves EMFAF national programmes if they are coherent with the strategic plans.

The Chair stated that, among the issues covered by the strategic guidelines, the MAC should definitely look into the importance of POs and inter-branch organisations. The Chair encouraged aquaculture members to be involved in the agenda item on the Production and Marketing Plans. The Chair asked the Secretariat to circulate the report of the European Parliament. In case no studies have taken place



on logistics for the aquaculture sector, there should also be follow-up on the topic, for example through a recommendation to EUMOFA.

### Marketing Standards

- **Exchange of views on the reply to the advice on the incorporation of sustainability aspects with Commission representative**

The Chair recalled that, on 15 October 2021, the MAC adopted comprehensive advice on the incorporation of sustainability aspects in the marketing standards framework, including 21 specific recommendations focused on socio-economic aspects. The Commission sent a letter of reply on 12 November 2021. In the view of the Chair, the reply had a more generic nature. The reply recognises that many important points were raised and that these were already reflected in the impact assessment process, but without many details. The Chair highlighted that the legislative proposal is expected to be published later in the year.

Frangiscos Nikolian (DG MARE) disagreed that the reply was generic, explaining that it was difficult to respond to 21 recommendations when the impact assessment was not yet finalised. Mr Nikolian expressed assurance that all recommendations were being considered in the process of finalising the impact assessment. In relation to the timeline of the legislative proposal, the Commission representative informed that internal discussions were taking place. The impact assessment was submitted, and efforts are taking place to accommodate the suggestions of the board. Taking into account other ongoing initiatives under the Farm to Fork Strategy, particularly the initiative on a sustainable food system framework and the initiative on substantiating green claims, there is an inherent difficulty to ensure consistency and avoid overlapping. The different timelines make the situation additionally complex, since, for example, the proposal on the sustainable food system framework is expected to be adopted in 2023. DG MARE is coordinating internally with DG SANTE and DG ENV, as recommended by the MAC. Therefore, it is not possible to know whether the legislative proposal on marketing standards will be adopted in the first semester of 2022, as previously planned.

The Chair stated that, in the Commission's reply, it was difficult to see how certain recommendations, for example on the appropriate legal framework, would be addressed and on the respect for the three pillars of sustainability. The Chair recognised that, in the context of an ongoing impact assessment, it would be difficult to respond to specific recommendations. The Chair would like to know which recommendations would not be reflected in the impact assessment.

Frangiscos Nikolian (DG MARE), in relation to the legal framework, stated that the marketing standards framework is composed by three different regulations adopted several years ago. Therefore, in line with the CMO Regulation, there was an effort to make the framework more in line with the Lisbon Treaty. Mr Nikolian emphasised that all recommendations were considered.

Gerd Heinen (DG MARE), in relation to the legal framework, emphasised that two out of the three regulations of the marketing standards framework were B2C, since these include rules on consumer information and labelling. If the marketing standards already cover consumer information, then these can also cover sustainability information. Concerning the three pillars of sustainability, as outlined in



the STECF report on the topic, environmental and social sustainability criteria are being considered for the potential grading of products. The grading and transparency provided will allow operators with a good environmental performance to better valorise their products, ensuring economic sustainability. Therefore, all three dimensions of sustainability were going to be directly or indirectly covered by the envisaged revision. As for the inclusion of criteria and indicators directly measuring product performance on economic sustainability, it would be interesting to see what specific criteria and indicators members would have in mind.

The Chair thanked Mr Heinen for the clarification on the legal framework. The Chair stated that it is recognised that the marketing standards framework goes beyond B2B. The Chair drew attention to recommendation b), according to which, if the European Commissions chooses to focus on one of the pillars of sustainability, the choice should be specific and avoid using general references to sustainability.

Pim Visser (VisNed) argued that, for Dutch operators, the B2B aspects of the marketing standards framework are essential, particularly on the freshness and size of the products. Mr Visser argued that an adaptation of these standards to the Lisbon Treaty would not be a solution, since it would unnecessarily reopen technical discussions in the EU institutions. In relation to consumer information, Mr Visser underscored that consumer information only happens after the first sale. The information must exist and be transferred to the consumer under another regulation. Concerning the experience in the value chain with sustainability indicators to valorise fish products, he drew attention to the use of MSC certification and expressed availability to provide information on the topic directly to the Commission representatives.

Jean-Marie Robert (Les Pêcheurs de Bretagne) thanked the Commission representatives for the efforts of articulation with other services regarding the different initiatives, since it is essential to achieve coherence. In relation to the relationship between the MAC and DG MARE, Mr Robert highlighted that there are usually exchanges in meetings and in writing. Nevertheless, it was not possible to discuss in detail the issues raised in the STECF report, for example on the indicators selected and the quality of the available data. The Commission's reply seems to indicate that DG MARE will continue with the impact assessment and with the legislative proposal, but it is not clear how the MAC can suggest detailed changes. In line with the CFP Regulation, there should be a close dialogue with DG MARE on this matter.

In relation to economic sustainability, Mr Robert argued that communication on sustainability does not necessarily mean economic valorisation of products for products. Currently, large retailers do their own sourcing policies. The sourcing does not necessarily take into account the decisions of the AGRIFISH Council or the scientific advice from ICES. There are large supermarkets that base their sourcing policies primarily on the evolution of the fish stocks, which, in his view, does not make sense. As an example, there was a 37% reduction of the TAC of the sole of Gascogne precisely to ensure a good level of the biomass. The large retailers do not seem to recognise these efforts, since the criteria function in an almost automatic manner and with an environmental focus. There are operators that prefer to source products from outside the EU for which the level of available information is much less. Social criteria are largely ignored.



Frangiscos Nikolian (DG MARE) underscored that DG MARE is not planning a label on sustainability. The initiative is about information to consumers with the use of indicators informing on some aspects the sustainability. In relation to Mr Visser's intervention, Mr Nikolian highlighted that, under the evaluation, operators asked for the abolishment of the freshness and size categories. Therefore, is considered under the possible policy options. The difficulties mentioned about the adaptation to the Lisbon Treaty have been taken into consideration.

Mr Nikolian expressed understanding for Mr Robert's intervention but explained that it would be unusual for an external stakeholder to have such a detailed influence over an impact assessment of the European Commission. DG MARE maintained constant dialogue, held an evaluation, regularly informed the MAC, and considered the advice. All these elements will contribute to the legislative proposal, while accounting for internal processes and the political mandate. Once the legislative proposal is adopted, the MAC will have other opportunities to provide advice and to contact the Commission services and other EU institutions. DG MARE continues to work with STECF experts to achieve scientific advice of high quality.

- **Way forward**

The Chair expressed recognition for the proactive collaboration between DG MARE and the MAC. The Chair asked for information on the timeline for the assessment and the legislative proposal.

Frangiscos Nikolian (DG MARE) drew attention to the complexity of the initiative on a sustainable food system framework. The framework is covering all food production as well as labelling, nutrition, and green public procurement. In this context, DG MARE must emphasise the specificities of the fisheries and aquaculture products and of the Common Fisheries Policy. The aim is to ensure consistency and avoid overlapping. The impact assessment on the sustainable food system framework is planned for the end of 2022. Therefore, it was not possible to state the exact timing for the legislative proposal on the marketing standards framework.

### Landing Obligation

- **Update on 2021 reporting by Commission representative**

Evelien Ranshuysen (DG MARE), in relation to previous advice, recognised that available data on the landing of unwanted catches is incomplete and incomparable between Member States. The most comprehensive dataset on reported catches available is the aggregated catch data report at the Commission's level. In this report, the indicator on catches for non-human consumption has particular relevance (<minimum conservation reference size MCRS). In this database, there are eight Member States reporting zero landings of unwanted catches, which is quite unlikely. There is likely a case of misreporting or underreporting. Initiatives from EFCA and audits from the Commission also illustrate this issue.

In order to gather more quantitative information on the catches and to monitor the implementation of the landing obligation, the Commission sends an annual questionnaire to the Member States, requesting information on several issues. The questionnaire emphasises the need for information on



unwanted catches. The previous year, when analysing the reports of the Member States and other information sources, STECF highlighted that the quantitative information has improved, but that a complete overview is missing. As recognised by the MAC's 2021 advice, it is important to have information on a regional basis. The Commission asked Member States to coordinate at a regional level. Last year, this request was not taken up by the Member States. This year, the Commission reemphasised this request. STECF will analyse the reports at the first plenary meeting in March 2022 (21 – 25 March).

In previous years, Member States provided limited to no information on socio-economic impacts. The information provided is that there is limited impact, but Member States emphasise that it is due to the exemptions in force. The Commission wants to progress on the assessment. Last year, the Commission asked STECF to discuss the topic and provide advice on further steps to analyse the socio-economic impacts. It will also be relevant in the context of the Commission's report on the functioning of the CFP. Ms Ranshuysen encouraged members to read the report of the STECF plenary meeting, which is publicly available. In the first half year of 2022, STECF will carry out an in-depth analysis to be discussed in the second plenary meeting (June 2022).

In relation the MAC's commitment, under the Work Programme of Year 6, to provide advice on the socio-economic impacts on the market of the landing obligation and market outlets, Ms Ranshuysen expressed receptiveness to a written advice on the mentioned issues. The advice can be considered in the context of the annual report on the landing obligation and of the report on the functioning of the CFP. The Commission representative drew attention to the ongoing public consultation on the functioning of the CFP, which includes questions on the landing obligation.

- **Exchange of views & way forward**

The Chair expressed hope that there would have been more data available on the socio-economic impacts. Taking into account the report on the functioning of the CFP, the Chair suggested the circulation of a questionnaire to the members on the socio-economic impacts experienced. The Chair added that he was not aware of any changes in the utilisation of undersized catches.

Pim Visser (VisNed) wanted confirmation that the only available outlets for the marketing of undersized fish were pet food and animal feed.

Evelien Ranshuysen (DG MARE) confirmed that it was the case. Member States must report on a specific indicator on that. The Commission utilises the aggregated catch data reporting, which includes the indicator on sales for non-human consumption.

The Chair asked the Secretariat to circulate the report of the 68<sup>th</sup> plenary report of STECF. The Chair proposed the circulation of a questionnaire to the members on the perceived effects of the landing obligation, in order to prepare advice.

### Annual Economic Report on the EU Fishing Fleet

- **Presentation of STECF 2021 Annual Report by Raúl Prellezo, Principal Researcher, AZTI**



Click [here](#) to access the presentation.

The Chair commented that the annual report does reflect the issues raised by MAC representatives, as active observers, at STECF meetings, concerning the impact of the COVID-19 pandemic and the effects of Brexit.

Raúl Prellezo (AZTI) provided background information on the development of the report. In terms of timeline, the 2021 annual report addresses data from 2019 and previous years. Information on 2020 and 2021 are projections. 2020 was quite complex due to the outbreak of the COVID-19 pandemic. 2021 was even more complex due to the pandemic and Brexit. Prior to 2017, there was a reduction in the number of vessels although, individually, more profitable. In the period of 2017 to 2019, the situation is different. In 2019, the profitability went down quite intensively. However, the EU fleet is profitable and is expected to be in 2020-2021.

In 2019, 77% of the EU fishing fleet was active. 71% of the crew was in full time employment. 63% of the Gross Value Added went towards remuneration of labour, while the remaining went to profits. In comparison with 2018, the landings decreased by 9.6% and the value of landings decreased 6.2%. The number of vessels decreased 1.4%. The number of fishers decreased 4.1%. The contribution to the Gross Domestic Product decreased 10.7%. Mr Prellezo proceeded with an overview of the small-scale fleet. In 2019, 75% of the EU fleet was composed of small-scale vessels. The fishers represented 48% of the fleet. Their contribution to the GDP represented 20% of the GVA of the fleet. In comparison with 2018, active vessels decreased 2%, the crew decreased 3.2%, and the contribution to the GDP decreased 1.5%. The value of landings remained stable.

Mr Prellezo provided a comparison of the large-scale fleet, the small-scale fleet, and the distant water fleet. Overall, the profitability of the large-scale fleet and of the small-scale fleet decreased. In the Mediterranean, the Black Sea, and the North Sea, the profitability of the small-scale fleet went up. In the South Western waters and the North Western waters, it went down. In the Baltic Sea, the small-scale fleet almost collapsed. The profitability of the large-scale fleet went down, except in the Mediterranean Sea. The gap in profitability between the small-scale fleet and the large-scale fleet is reducing. Average wages are much higher in the large-scale fleet, but the values of the small-scale fleet are biased due to mixed rents. The distant water fleet represents only 0.4% of the fleet, but accounts for 14% of the landings (value and weight) and approximately 10% of the GVA. The profitability margins of the distant water fleet worsened compared to 2018. The large-scale fleet drives the EU's overview.

The report provides a nowcast of 2020. The economic performance in 2020 was obtained by applying the observed and anticipated drivers and variables, where the COVID-19 pandemic was an important driver, but not the only one considered. In comparison with 2019, landings decreased 1% in weight and 4% in value. The GVA increased 1% and the gross profit increased 9%. The small-scale fleet suffered a decrease of 4% and 5% of GVA and gross profits, respectively. The long-scale fleet increased by 3% and 11%, respectively. The fuel price decreased by 21%. It is challenging to differentiate what effects are directly related to the COVID-19 pandemic and to what extent, since there are other effects, for example fuel prices.



The report provides a forecast of 2021. Compared to 2020, real prices are relatively up (+1%), fuel costs are up (16%), the activity was moderately affected, the landings and the value of landings decreased (2.8% and 3.6%, respectively), the gross profit decreased (6.7%). Compared to 2019, the real prices are relatively constant, the fuel costs decreased (6.7%), the activity was severely affected, landings and value of landings decreased (2.8% and 3.6%, respectively) and the gross profit decreased (14.3%). There was no recovery for the small-scale fleet and the large-scale fleet in 2021 compared to 2019 and to 2020.

The report includes a special chapter on the Trade and Cooperation Agreement with the United Kingdom. The chapter aims to inform on the impact, taking into account the relative stability of quotas and The Hague's preferences. It excludes the effect of scientific advice. There is an analysis of economic impact per Member State based on the total value of the used quota. In 2021, in terms of weight, the economic impact was of 38 880 tonnes and, in terms of value, of 42.3 million €. The report also includes a special report on fuel, which analyses fuel intensity and efficiency by all specific segments of the EU fleet. Both indicators have increased. Therefore, there is more energy consumed per landed tonne and more fuel cost per revenue. Additionally, there is a special chapter on trawlers. In 2019, trawlers represented 35% of the landed value and 26% of the landed weight. In weight, the most relevant Member States are Spain, Denmark, Sweden, and France. In value, the most relevant Member States are Spain, Italy, and France.

As concluding messages, Mr Prellezo highlighted that the economic performance went down, but remained profitable, even though there are some exceptions, such as the small-scale fleet in the Baltic Sea. The effects of the COVID-19 pandemic are not clear, because there are other costs, for example the changes in fuel prices. In any case, differences are anticipated among the small-scale fleet and large-scale fleet, since the latter seems to be more affected. The report includes specific chapters on trawlers, and Brexit, but it is not easy for STECF to handle too many specific chapters. The priority is to have the best data as possible and provide the best overview.

- **Exchange of views**

The Chair expressed satisfaction that the suggestions from the MAC were taken onboard. The Chair requested information about the Terms of Reference for the 2022 report, particularly if there would still be specific chapters on Brexit and the COVID-19 pandemic.

Raúl Prellezo (AZTI) responded that the Terms of Reference had been discussed, but not yet agreed. The report will include the real data of 2020, so it will not be necessary to have a specific chapter on the COVID-19 pandemic.

Frangicos Nikolian (DGMARE) informed that the data call would be launched that week. Afterward, the Terms of Reference will be prepared.

Daniel Voces (Europêche) highlighted that, under the European Green Deal, all sectors are supposed to reduce greenhouse emissions by 55%. The report's data on fuel consumption dates back to 2009. Under the Kyoto Protocol, the European Commission and the Member States were providing data on greenhouse emissions by all sectors since 1990. Mr Voces wanted to know if STECF could receive data



from DG CLIMA, in order to develop better estimates on fuel consumption from the fishing industry. Mr Voces expressed his conviction that the reduction of emissions in the sector was larger than described in the STECF's report.

Raúl Prellezo (AZTI) responded that data on fuel consumption and cost is requested from Member States under the data call. Therefore, there is data for all the fleet segments. The data provided will correspond to 2020. All the fuel use and costs will be publicly available.

The Chair asked Mr Voces whether it would be useful to send a request on behalf of the MAC.

Daniel Voces (Europêche) expressed agreement.

The Chair underscored the importance of the MAC's participation as active observers at the meetings on the 2022 annual report.

Frangicos Nikolian (DGMARE) explained that the annual report is based on a data call under the Data Collection Framework. This is a requirement to ensure consistency and that the data was collected under the same methodology. Therefore, it is not possible to use data prior to 2008. It is a limitation of the report. Nevertheless, there is an indication of how the sector performed in the past 12 years. The Terms of Reference will not include a request for data from DG CLIMA. Mr Nikolian expressed openness to the participation of the MAC as active observers, as has been past practice.

The Chair suggested that a request could still be formulated for DG MARE to consider the data on emissions, even if it is not reflected in the annual report. The Chair also suggested that STECF should have a closer look at the criteria of the GVA value. The depreciation of capital can have a very significant effect. This issue is dealt differently across the Member States.

Raúl Prellezo (AZTI) recognised the relevance of the topic. It is necessary to consider the value of capital and the input of depreciation costs. STECF follows the developed mechanisms to calculate the value of capital. The input of depreciation costs has not been solved in economic literature and academia. STECF uses the interest rates. It is also possible to use fixed imputations of depreciation.

The Chair proposed to include the topic on the draft agenda of the next meeting, in order to be covered when participating at the STECF meeting on the 2022 annual report.

### European Maritime Fisheries and Aquaculture Fund

- **Presentation on national programmes by Member States representatives – Spain**

Click [here](#) to access the presentation.

The Chair recalled that the MAC previously adopted advice on the EMFAF funding, for example on the provision of funding for Production and Marketing Plans (PMPs). The Chair suggested the inclusion of further presentations under the draft agenda of the next meeting, taking into account the ongoing development of national programmes.



Raúl Rodrigálvarez (Spain) provided an overview of the operational programme of Spain. The budget is of 1.120.441.924€. In terms of timeline, the public information period concluded in December 2021. The consolidation of the final version was in January and February 2022. Negotiations with the European Commission will take place from January to July 2022. The approval is planned for July 2022. The operational programme is divided into four key objectives: fishing and marine environment, aquaculture, value chain and blue economy, and participatory local development.

In terms of logic of intervention, Mr Rodrigálvarez highlighted the political objective of a more green and low-carbon Europe, through the promotion of a clean and equitable energy transition, the green and blue investment, the circular economy, adaptation to climate change and risk prevention and management, plus the political objective of a Europe that is closer to its citizens, promoting the integrated and sustainable development of urban, rural and coastal areas and local initiatives. There are four priorities: 1) foster sustainable fishing and the recovery and conservation of aquatic biological resources; 2) to promote sustainable aquaculture activities, such as the transformation and commercialisation of fishery and aquaculture products, thus contributing to food security in the Union; 3) allow a sustainable blue economy in coastal, insular and inland areas, and encourage the development of fishing and aquaculture communities; and 4) strengthen the international governance of the oceans and allow the seas and oceans to be safe, protected, clean and managed in a sustainable way. There are also ten specific objectives.

Mr Rodrigálvarez provided an overview of the specific objectives and the type of activities. The types of activity have been developed in a specific manner to detail all the necessary issues to identify the eligible operations as well as the requirements. Under priority 1, there are 21 types of activities. Under priority 2, there are 13 types of activity for aquaculture and 8 types of activity for the value chain and blue economy. Under priority 3, there are 3 types of activity. Under priority 4, there are 3 types of activity. The Spanish representative also provided an overview of actions on temporary and definite stops of the fleet; motors; first purchase of vessels; safety, labour conditions and energy efficiency; training; artisanal coastal fishing and artisanal aquaculture; data and control; Outermost Regions; aquaculture; commercialisation and processing; participatory local development; governance. He also listed the main target groups of the national programme.

- **Exchange of views & way forward**

Francisco Nikolian (DG MARE) expressed satisfaction with the substantial and substantive measures on market matters but added that he would need to check internally regarding the suggested support for private storage. Mr Nikolian expressed concerns about the low absorption of the EMFF in Spain, encouraging the Member State to increase uptake in the next years.

Bruno Guillaumie (EMPA) wanted to know if Spain planned specific indicators for aquaculture, particularly on production. Mr Guillaumie also asked about predictions on reduction of imports, increase of consumption, and effects on market segments.

Raúl Rodrigálvarez (Spain) explained that the national programme includes indicators to measure the impact of the different types of activity. The selected indicators are foreseen in the regulation.



## Production and Marketing Plans

- **Exchange of views on MAC's guidelines and good practices**

The Chair recalled that, in 2018, the MAC published Guidelines and Good Practices on the Production and Marketing Plan, with assistance from the European Commission, which were widely circulated and used by POs. The Chair asked members whether it was relevant to update the guidelines and good practices, taking into account the new funding period. It could also be relevant to increase the details on aquaculture actions. The Chair also took the opportunity to encourage members to participate on the ongoing work concerning the report on the functioning of the CMO Regulation.

Pim Visser (VisNed) emphasised that it was important to discuss the role of PMPs under the revision of the CMO Regulation. Concerning the time passed since the development of the guidelines and good practices, these were outdated. Mr Visser argued that, if there was an audience for them, then it would be relevant to update the guidelines and good practices. Mr Visser informed that, in the Netherlands, he has been working on the topic, since there is a suboptimal use of the possibilities provided by the PMPs.

The Chair expressed confidence that there was an audience among POs. The Chair recognised that the utilisation of PMPs was suboptimal.

Javier Ojeda (FEAP) stated that, in his view, the document was quite comprehensive on aquaculture matter. Mr Ojeda drew attention to the increasing importance of transnational POs.

- **Way forward**

The Chair encouraged Mr Ojeda and Mr Visser to prepare potential draft amendments to update the guidelines and good practices ahead of the next meeting.

Sergio López García (OPP Lugo) recalled his contribution to the development of the guidelines and good practices. Mr López agreed that it was important for the Working Group to reconsider and revise the document, especially in the context of the new operational programmes. If the operational programmes bring significant changes, then there should be a revision of the document. Otherwise, an update would be sufficient.

The Chair encouraged aquaculture members to get in contact with Mr Ojeda and fisheries members to get in contact with Mr Visser, in case they had any suggestions of amendments.

## AOB

None.



## Summary of action points

- Focus Group on Brown Crab:
  - Under the draft agenda of the next meeting, exchange of views to be scheduled
- Strategic Guidelines for Sustainable and Competitive EU Aquaculture:
  - Secretariat to circulate the European Parliament's report on the topic
  - In case there are no studies on logistics for the aquaculture sector, prepare a recommendation for an EUMOFA study on the topic
- Landing Obligation:
  - Secretariat to circulate a questionnaire to the members on the perceived socio-economics effects of the landing obligation
- Annual Economic Report on the EU Fishing Fleet:
  - Secretariat and Europêche to prepare request on the use of data of the Kyoto Protocol on greenhouse emissions of the fisheries sector
- European Maritime Fisheries and Aquaculture Fund:
  - Under the draft agenda of the next meeting, presentations by other Member States and exchange of views to be scheduled
- Production and Marketing Plans:
  - Ahead of the next meeting, Javier Ojeda (FEAP) and Pim Visser (VisNed) to prepare potential amendments to update the guidelines and good practices



## Attendance List

Representative	Organisation	Role
Agnes Lisik	Oceana	Member
Agnieszka Korbel	WWF	Member
Aitana López Albuquerque	Spain	Observer
Alen Lovrinov	Omega 3 Producers Organisation	Member
Alexandra Philippe	Market Advisory Council	Secretariat
Alexandre Rodríguez	Long Distance Advisory Council (LDAC)	Observer
Annelie Rosell	Swedish Pelagic Federation Producer Organisation (SPFPO)	Member
Benoît Guerin	BG Sea Consulting	Observer
Benoît Thomassen	Federation of European Aquaculture Producers (FEAP)	Member
Bruno Guillaumie	European Molluscs' Producers Association (EMPA)	Member
Carla Valeiras Álvarez	EuroCommerce	Member
Catherine Pons	Federation of European Aquaculture Producers (FEAP)	Member
Christine Absil	Good Fish	Member
Daniel Voces	Europêche	Member
Daniel Weber	European Fishmeal	Member
Eduardo Míguez López	Puerto de Celeiro (OPP77)	Member
Emiel Brouckaert	European Association of Fish Producers Organisations (EAPO)	Member
Emilia Gargallo Gonzalez	European Commission	Expert
Evelien Ranshuysen	European Commission	Expert
Frangiscos Nikolian	European Commission	Expert
Garazi Rodríguez	Federation of European Aquaculture Producers (FEAP)	Member
Georg Werner	Environmental Justice Foundation (EJF)	Member
Gerd Heinen	European Commission	Expert
Guus Pastoor	Visfederatie	Member
Ignacio Fresco Vanzini	Oceana	Member



Representative	Organisation	Role
Javier Ojeda	Federation of European Aquaculture Producers (FEAP)	Member
Jean-Marie Robert	Les Pêcheurs de Bretagne	Member
Jennifer Reeves	Marine Stewardship Council (MSC)	Member
Jens Mathiesen	Danish Seafood Association	Member
Jérémie Souben	Fédération des Organisations de Producteurs de la Pêche Artisanale (FEDOPA)	Member
José Basilio Otero Rodríguez	Federación Nacional de Cofradías de Pescadores (FNCP)	Member
Josip Furčić	Croatia	Observer
Juan Manuel Trujillo Castillo	European Transport Workers' Federation (ETF)	Member
Julio Morón Ayala	Organización Productores Asociados Grandes Atuneros Congeladores (OPAGAC)	Member
Karolina Majewska	European Commission	Expert
Katarina Sipic	EU Fish Processors and Traders Association (AIPCE) / European Federation of National Organizations of Importers and Exporters of Fish (CEP)	Member
Laura Rull	Spain	Observer
Maria Luisa Álvarez Blanco	Federación de Asociaciones Provinciales de Empresarios Detallistas de Pescados y Productos Congelados (FEDEPESCA)	Member
Martina Zurli	FRUCOM	Member
Matthias Keller	Bundesverband der deutschen Fischindustrie und des Fischgrosshandels e.V.	Member
Miguel Lizaso	European Commission	Expert
Mike Turenhout	Visfederatie	Member
Mirta Novak	Croatia	Observer
Nicolás Fernández Muñoz	Organización Productores Pesqueros Artesanales Lonja de Conil (OPP72)	Member
Pablo Iraeta	Spain	Observer
Patrick Murphy	Irish South & West Fish Producers Organisation (IS&WFPO)	Member
Pedro Luis Casado López	Asociación de Armadores Punta del Moral (OPP80)	Member
Pierre Commère	Association Des Entreprises de Produits Alimentaires Elaborés (ADEPALE)	Member



Representative	Organisation	Role
Pim Visser	VisNed	Member
Poul Melgaard Jensen	Danish Seafood Association	Member
Quentin Marchais	ClientEarth	Member
Raúl PELLEZO	STECF / AZTI	Expert
Raúl Rodríguez	Spain	Observer
Roberto Carlos Alonso	ANFACO-CECOPECA	Member
Rosalie Tukker	Europêche	Member
Santiago Folgar Gutiérrez	Asociación de Volaneros del Cantábrico Noroeste (AVOCANO)	Member
Sean O'Donoghue	Killybegs Fishermen's Organisation (KFO)	Chair
Sergio López García	Organización de Productores Pesqueros de Lugo (OPP-07-LUGO)	Member
Stylianos Filopoulos	Aquaculture Advisory Council (AAC)	Observer
Thomas Kruse	Danish Fishermen P.O.	Member
Tuure Eskelinen	EuroCommerce	Member
Wouter van Zandbrink	Dutch Mussel Traders Association	Member
Yobana Bermúdez	Asociación Española de Mayoristas, Importadores, Transformadores y Exportadores de Productos de la Pesca y Acuicultura (CONXEMAR)	Member

