

Working Group 2: EU Markets

Minutes

Thursday, 26 January 2023 (10:15 – 14:00 CET)

NH Brussels EU Berlaymont

Interpretation in EN, ES, FR

Welcome from the Chair, Pierre Commère

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

Adoption of draft agenda and of the last meeting minutes (19.09.22): adopted

Action points of the last meeting

- **State-of-play of the decisions made during the last meeting – information**
- Scientific, Technical and Economic Committee for Fisheries (STECF):
 - Draft advice on the Economic Report on the Fish Processing Industry, particularly on improved data collection, to be developed
 - Draft advice circulated: 2 December 2022
- Banning Forced Labour:
 - Briefing note of EJF, Oceana, TNC, WWF and Anti-Slavery International to be circulated
 - Following the circulation of the briefing note, the Secretariat to consult the member, via email about their interest in the development of draft advice
 - Briefing note included in the annotated version of the meeting's draft agenda
 - Exchange of views among members, plus consideration of draft Terms of Reference for external study scheduled
- Trade Agreements & Trade Policy Instruments:
 - Continue monitoring developments on the revision of the Union Customs Code and of the WTO Agreement on Fisheries Subsidies
 - Ongoing
- EU Taxonomy for Sustainable Initiatives:
 - Good Fish to send a clarification of their position by the next day
 - Following the clarification, draft advice to be put forward to the Executive Committee for adoption via urgent written procedure
 - Advice adopted: 30 September 2022



- Illegal, Unreported and Unregulated (IUU) Fishing & Global Governance:
 - Presentation of the two upcoming studies of the EU IUU Coalition and of ClientEarth to be scheduled under the draft agenda of the January 2023 meeting
 - Following the presentations, Working Group 2 to assess and potentially develop advice
 - Presentations and exchange of views scheduled

- Focus Group on Trade:
 - Broader consideration of the draft Terms of Reference to be scheduled under the draft agenda of the January 2023 meeting
 - Consideration of the draft Terms of Reference scheduled

European Market Observatory for Fisheries and Aquaculture (EUMOFA)

- **Presentation of the “EU Fish Market” 2022 report by Christophe Vande Weyer and Laurène Jolly (MARE A4)**

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

Christophe Vande Weyer (DG MARE) informed that the aim of this annual publication is to provide the most comprehensive report on the market developments from a EU and a worldwide perspective. The report is based on the official data available. There are limitations, since some of the data dates back to 2020 and 2021, so it might be obsolete due to recent market developments. Nevertheless, the Commission is confident that it is the most robust source on market information available. The report aims to reply to different questions, such as “what is produced/exported/imported?”, “when and where?”, “what is it consumed?”, “by whom?”, “what are the main trends?”. A comparative analysis allows to assess the performance of fishery and aquaculture products in the EU market compared with other food products.

Mr Vande Weyer, on the main producers in 2020, explained that there were no significant changes when compared to the previous year. There was a 2% increase in aquaculture production, which compensate for a 2% decrease in catches. Apart from Indonesia, all major Asian aquaculture producers reported increases, while there were significant decreases in fisheries production in China, USA, and Indonesia. The EU’s production represented 29% of the European production. The trends were the same for catches and for aquaculture. Five species represented more than half of the total EU production: herring, Alaska pollock, blue whiting, cod, and mackerel. The Commission representative provided an overview of the main trade flows in 2021.

Mr Vande Weyer, on the EU supply balance of fisheries and aquaculture products in 2020, explained that it is a sum of the production and imports, while deducting exports. The EU supply for human consumption was 180.000 tonnes in Live Weight Equivalent, so lower than in 2019, and one of the lowest amounts registered in the 2011-2020 decade. The report also provides information on the supply balance per wild products and per farmed products.

Concerning the EU-27 market growth and self-sufficiency rates, Mr Vande Weyer informed that, in 2020, the self-sufficiency rate was estimated at 38.9%, which follows a negative trend since 2018. It



represents a downward trend in EU production and an increase in imports. Imports prevail for tuna, salmon, cod, Alaska pollock, shrimp, which are the major species consumed in the EU. These species represent 43% of the EU's total apparent consumption of fisheries and aquaculture products. When considering only these five species, the EU's self-sufficiency rate is merely 11%.

Mr Vande Weyer explained that the per-capita apparent consumption in 2020 was estimated to have dropped by 1.7Kg of Live Weight Equivalent in comparison with 2019, reaching 28.3Kg per capita. In this estimate, 72% comes from fisheries products and 28% from aquaculture ones. The downward trend was similar in both production methods. The report includes a comparison of per capita consumption across the different Member States. Portugal continues to have the highest consumption of fishery and aquaculture products per capita. As for the species that drive the downward trends in per capita consumption, the Commission representative informed that it was mainly in cod, hake, and squid.

Concerning the consumption of unprocessed products through retail, foodservice and institutional channels, Mr Vande Weyer highlighted that, even though the overall consumption per capita was decreasing, organic products were more resilient, even though these only represent 2% of the consumption. In different Member States, the consumption of organic products either increased or remained steady, while the consumption of other products decreased.

On the EU-27 trade of fishery and aquaculture products with non-EU countries, Mr Vande Weyer highlighted that the trade balance remained negative. Compared to 2020, imports increased by 7% in value and 1% in volume. In value terms, the extra-EU exports totalled 6.8 billion euros in 2021, which represents a 6% decrease in comparison with 2020. Nevertheless, in 2021, the value was 11% higher when compared with 10 years prior. The deficit was 10% higher than in 2020. The Member States with the highest deficit, above 1 billion euros, saw a worsening of the situation in 2020 and in 2021. The only exception was Germany, which decreased the imports in comparison with the exports.

Regarding imports from third countries, Mr Vande Weyer explained that more than one quarter of the imports originate from Norway, which is followed by the UK and Morocco. The report includes a comparison of the international trade flows of fishery and aquaculture products with the international trade of meat. Imported fish was 5.5 times higher the value of imported meat. In the EU, imports of agri-food and fish and seafood products totalled 156 billion euros, of which fish accounts for 14%, while meat accounted for 2% of the value.

Concerning the extra-EU exports of fisheries and aquaculture products, Mr Vande Weyer highlighted that the values were much lower than for the imports. The main destinations of exports were UK, Norway, USA, and Nigeria. As for the intra-EU trade of fishery and aquaculture products, the Commission representative pointed out that the trend was upward, which demonstrated the dynamic functioning of the market. The combined value of intra-EU exchanges of salmon and cod accounted for 38% of the total value of intra-EU trade.

Mr Vande Weyer informed that the report included data on the landings in the EU-27. From 2009 to 2020, the landings of several of the main commercial species decreased in the EU. The main drops in value occurred for skipjack tuna and Atlantic horse mackerel. Landings of skipjack tuna have



decreased mainly due to a drop in frozen tuna landed in Spain, while the decrease in landings of Atlantic horse mackerel was mainly linked to a decrease in landings of fresh products in Portugal and frozen products in the Netherlands. In terms of value, skipjack tuna, Norway lobster, and anchovies are the main species that drive the trends. Anchovies were associated with a decrease in the average price and in the volume of landings in Italy and Greece. The landings of Norway lobster decreased by 24% in volume, which is linked to a decrease in all main landing countries, especially in Ireland and Denmark.

Mr Vande Weyer further informed that the report includes a chapter on aquaculture production in the EU-27. Mussels were the main produced species by volume, while trout recorded the highest overall value. The last three years of the analysed decade demonstrated a decline in the production value of some of the high-valued species, including oyster and clams, both in nominal and real terms. The Commission representative highlighted bluefin tuna as a notable example in aquaculture, since it increased from 0.5% to 3% due to an exceptional trend in Maltese production from 2011 to 2020. Mussels and oysters decreased from 43% to 37% of the total production and from 15% and 11%, respectively. The production of mussels and oysters increased, but the total share decreased due to more significant increases in imported species.

Mr Vande Weyer delivered the main conclusions of the report:

- In 2021, the COVID-19 effects on consumption of fish in the EU continued: household expenditure grew 7% from 2020. This trend was connected to “stay at home” regulations to face the pandemic. There was a very significant increase of at home consumption. According to estimates of Euromonitor, out of home consumption also grew. Sales of processed fish products through foodservices increased by 15%. Increases are expected to continue.
- There was a deterioration of the trade balance on fish (+10% from 2020), due to both increased imports and decreased exports. Values of imports increased more than volumes. This is due to a reduction of value of the Euro in exchange rates, particularly against the Norwegian Crown. There was an increase in high value species destined to the HOREC sector, especially salmon. The Euro also lost value against the Icelandic Krona and the British Pound.
- 2021 was a record year for intra-EU flows of fish, which were greater than extra-EU imports for the first time in 10 years. These are influenced by reexports of originally imported products. There are highly complex processing chains, which must be accounted for.
- Marine fuel prices started to rise in 2021, gradually leading to a higher fuel cost for the EU fishing fleet, after the major drop during the COVID-19 pandemic. On average, marine fuel prices rose by 48% from 2020 to 2021, but this was still slightly lower than the 2019 average.
- On the production side, 2020 was a year of decade lows in the supply of fish, mainly due to the COVID-19 pandemic’s impact on the sector (especially on logistics, production activities and international flows of goods).



- Landings of fishery products, including species not destined for human consumption and seaweed, dropped in both volume and value, due to both the effects of the outbreak of the COVID-19 pandemic, which caused a reduction in fishing efforts, as well as to the quotas, which were generally lower in 2020 than in 2019.

- **Exchange of views**

The Chair praised the value of the report for a better understanding of the fishery and aquaculture market. The international trade flows are very significant in the market, which translates into a significant quantity of data to collect and analyse. The trade flows are not always easily comparable.

Bruno Guillaumie (EMPA), concerning the title of the report, pointed that the report is not merely about the “fish” market, but of seafood products in general. In relation to oysters and mussels from aquaculture production, Mr Guillaumie wanted to know if Mr Vande Weyer was referring to the marketing value or to sales to consumers. He highlighted that, even though the data was sent in 2021, it actually corresponds to 2020, because mussels and oysters’ undertakings generally close their account by end of June. Despite the pandemic, in 2022, the prices of oysters recovered to the levels of 2020. The delays in the data should be noted in a footnote in the report.

Paul Thomas (EAPO) wanted to know if the higher consumption of wild capture products in comparison to farmed products was due to tuna. Mr Thomas requested information on the definition of organic products.

Daniel Voces (Europêche), concerning the mentioned reduction in the production of seafood products in the EU, wanted to know how the departure of the UK from the EU was accounted for. Mr Voces also wanted to know if “exports” covered both products from EU production and non-EU or merely products from the EU.

Laurène Jolly (DG MARE), concerning the data on aquaculture products, informed that all sources are provided in the report. There is a recognised lack of data for aquaculture. The source is EuroStat through data provided by the Member States. The values are not at consumer level. Ms Jolly recognised that there is always a gap of few years in the data, which is particularly relevant for prices.

On the consumption of tuna, Ms Jolly informed that detailed information per species was available in the report. “Apparent consumption” consists of a balance between EU production, imports, and exports. There can be different results when comparing this balance with household consumption. As for the definition of organic products, the Commission clarified that it only included aquaculture products, not fisheries products.

On the accounting of the departure of the UK, Ms Jolly informed that, when doing comparisons, EUMOFA excluded the UK. Therefore, the comparisons are all based on the EU-27. The Commission representative explained that “exports” could be exports of products produced in the EU and of reexports of imported products.



Christophe Vande Weyer (DG MARE), in response to Mr Guillaumie’s intervention, recognised that the name of the report was a “shortcut”. The expression “seafood” could be used, but it would still exclude some of the products covered in the report. Nevertheless, the title of the report could be amended. The Commission representative highlighted that it was useful to know about the closure of the accounts of aquaculture undertakings in June. He offered to clarify the question bilaterally with Mr Guillaumie.

The Chair, concerning reexports of imported products, highlighted that, in the case of tropical tuna, there are exported products that are processed and reimported. This can be the case for example for tuna imported from the Seychelles, Madagascar or Mauritius. These situations can be difficult to consider in a general picture but deserve case by case analyses.

Bruno Guillaumie (EMPA), concerning the imbalance between imports and exports, emphasised that not all species were in a situation of deficit. As an example, there is a surplus of oysters. Mr Guillaumie argued that this should be mentioned in the report.

Christophe Vande Weyer (DG MARE) explained that, for the five most consumed species, the trade balance was negative with a self-sufficiency rate of 11%. Nevertheless, the report also includes the trade balance and self-sufficiency rate of the fifteen most consumed species. The EU is self sufficient in some of these species. The Commission representative emphasised that all the figures in the report must be considered in the perspective of the production method. The report includes a detailed methodological note. He urged members to read the note, for a better understanding of the figures and of the inherent limitations.

Laurène Jolly (DG MARE) emphasised that, every year, EUMOFA updates factsheets about different species, which cover several kinds of information, including trade balance. Ms Jolly informed that, in the near future, factsheets on additional aquaculture species would be included. The Commission representative recognised that there is a surplus in the EU production of oysters and mussels.

Mike Turenhout (Visfederatie) highlighted that, beyond the report, there was additional data available on the website of EUMOFA, which members could consult.

The Chair urged members to read the report, complimenting the robustness of the document.

EU Market Supply

- **Presentation of “Finfish Study 2022” by Mike Turenhout, Visfederatie**

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

Mike Turenhout (Visfederatie) congratulated the Commission on the quality of the EUMOFA report. Similar information and results were achieved in the AIPCE-CEP study and in the EUMOFA report. Mr Turenhout explained that the study was undertaken every year to achieve a better understanding of the market, including the role of production, of imports, and consumption trends.



Mr Turenhout highlighted that the EU seafood processing industry has a total output value of around 32 billion euros and represents 116.000 jobs, excluding logistics, warehousing, services, maintenance, equipment, and others. The seafood processing industry is an important industry, particularly for remote areas and certain seafood specific coastal regions.

Mr Turenhout explained that the market supply is based on EU production (aquaculture and fisheries) with EU imports and minus the EU exports. The EU self-sufficiency rate was around 38% in 2020. The import dependency is expected to have grown in 2021. In 2019, the EU import dependency was of 59%, since the import dependency is almost 100% in the most important species (e.g., Salmon, cod, Alaska pollock). At the same time, there was a drop in the EU production of around 3.500 kT, while aquaculture production remained stable. Mr Turenhout further explained that the drop was related to the COVID-19 restrictions, including tied-up fishing vessels due to lack of HORECA sales of high value species, the Russia-Ukraine war, the increased fuel prices, and the exit of the UK from the EU.

Mr Turenhout underscored the importance of guaranteeing raw materials for the EU seafood processing industry. Imports from third countries are increasingly more important. Costs have increased for the processing industry due to the war, high fuel prices, inflation, and increased costs of raw materials, the feed, the packaging materials, warehousing, and salaries. Therefore, there should be a focus on a fruitful trade policy to allow the import of raw materials from sustainable stocks, including through Autonomous Tariff Quotas. Free Trade Agreements can be used to import raw materials and other materials. Additionally, there is legislation on responsible sourcing, such as the IUU Regulation.

Mr Turenhout emphasised the need to increase the EU production. There should be an optimisation of the utilisation of the quotas of EU fisheries, in accordance with the maximum sustainable yield, since, in 2021, the utilisation rate was only 75%. In the EU, there is encouragement to invest in aquaculture production, but the production remained at around 1 million tonnes. Investors should be encouraged to invest in aquaculture. The processing industry wants to continue and increase processing in the EU.

- **Exchange of views**

Bruno Guillaumie (EMPA) argued that it was not sufficient to encourage investment. As demonstrated by the STECF report on aquaculture, aquaculture farms are profitable without EMFAF support. As an example, in France, an association of shellfish farmers will invest 12 million euros in the production with small national support. Importantly, Member States need to lift the constraint of space for aquaculture production, which should be done in cooperation with fishers and environmental NGOs. Only a few Member States allocate space to selected activities. There are difficulties in obtaining aquaculture licenses and in acceptability.

Daniel Voces (Europêche) requested information on the difference between the production figures of the study when compared to the STECF's report on the processing industry. Concerning the reduction in the EU production, Mr Voces highlighted that there were some external factors, such as the COVID-19 pandemic, but also some EU policies, such as the Mediterranean Multiannual Plan, the Deep Sea Access Regulation, the action plan to conserve fisheries resources and protect marine



ecosystems, and the Nature Restoration Law. He wondered if the EU would continue with a decrease of its own production, while importing more. Concerning the utilisation rate of the quotas of EU fisheries, Mr Voces asked for information on the causes as well as suggestions for improvement.

Javier Ojeda (FEAP) thanked AIPCE-CEP for the valuable information. Mr Ojeda agreed with Mr Guillaumie that it was not a matter of investment, but a matter of reducing the administrative burden to allow investments to take place.

Sean O'Donoghue (KFO), concerning the utilisation rate of the quotas of EU fisheries, stated that it was likely connected to small pelagic fisheries. There can be very significant fluctuations. Mr O'Donoghue wanted to know if the data of AIPCE-CEP was aligning with the data of EUMOFA and of STECF. In the case these were not aligned, he wanted to know the reasons for the differences.

Patrick Murphy (IS&WFPO) wanted to know if there were projections available about future impacts due to production and imports on employment, particularly for rural and coastal areas. Mr Murphy also wanted to know if prices to the producers had fluctuated. He agreed with Mr Voces that there was a trend of new regulations impacting the fishing industry, adding that it was quite difficult to attract new workers and investors.

Mike Turenhout (Visfederatie), in relation to Mr Guillaumie's intervention, replied that the purpose was to call for policies that improve the circumstances of aquaculture production, which would cover space for both sea-based and land-based aquaculture.

In relation to Mr Voces's intervention, Mr Turenhout explained that the difference between the EUMOFA report and the AIPCE-CEP study was that the study aimed to include information about year X-1, while the EUMOFA report is generally X-2. Some assumptions, based on expert knowledge, are used. These might change due to the use of real data. Concerning the utilisation rate of the quotas of EU fisheries, Mr Turenhout stated that his aim was to launch the discussion on the matter. There were no clear solutions in sight.

In relation to Mr O'Donoghue's intervention, Mr Turenhout agreed that small pelagic fisheries were an important factor of fluctuation, but added that there were other disturbances in the recent years. Mr Turenhout explained that there are differences between the reports due to assumptions based on expert knowledge and due to the use of different Live Weight Equivalent conversion rates. He added that it would be useful to develop a common table of conversion rates together with the EUMOFA experts.

In relation to Mr Murphy's intervention, Mr Turenhout stated that, in the Northern European industry, there was an increasing importance of non-EU raw materials. For example, in the Dutch city of Urk, the economy used to be essentially based on North Sea fisheries and processing, while, nowadays, there an increasing use of raw materials from Norway and other third countries. He expressed concerns that, if EU production continues to decrease, there will be a loss of knowledge.

The Chair mentioned that data on production, imports and exports was not always homogenous. For example, there can be filleted products and other preparations. Therefore, the aggregation of the



data is quite difficult. The Chair highlighted that some work took place to harmonise the Live Weight Equivalent conversion rates between EUMOFA and other sources, but full convergence had not yet been achieved.

Pim Visser (VisNed) recalled that the fisheries industry is an economy activity. In the case of Urk, a fisheries community was converted into a fish trading community. Dutch fisheries were impacted by a concurrence of negative policy decisions and economic difficulties, which is leading to a 60 to 70% reduction of flatfish fisheries. Mr Visser stated that the community of Urk was a good example of adaptability to different circumstances. He underscored the importance of socio-economic developments and of ensuring the viability of communities.

Laurène Jolly (DG MARE) recalled that the reports provided an annual view of the fisheries and aquaculture market, but that EUMOFA also provided monthly and weekly data. In 2022, the inflation rate increased very significantly the prices at consumer's level, which impacted the household consumption. Based on the available data for the most significant Member States, in the first three quarters of 2022, there was a decrease of the household consumption. Imports, in volume, were decreasing significantly, while the value significantly increased.

Focus Group on Trade

- **Consideration of draft Terms of Reference**

The Chair recalled that the proposal of establishing a Focus Group on Trade had been discussed in previous meetings. Previously, an Initial Focus Group on Trade, led by Poul Melgaard Jensen (Danish Seafood Association) was established, which led to the adoption of advice on the improvement of data concerning the trade policy instruments. The advice was submitted to the European Commission, but a reply was still pending.

The Secretary General confirmed that the advice was submitted to the European Commission. There was a letter from the Head of Unit of MARE B3 informing that DG MARE would liaise with DG TRADE and DG TAXUD and provide comprehensive feedback later. The Secretary General informed that an email message had been recently sent to DG MARE requesting an update, but no reply was received. Therefore, it was unclear how much more time would be required.

The Chair further recalled that the Working Group agreed that it would be relevant for the new Focus Group to analyse the impact of trade policy instruments. Draft Terms of Reference were developed. The draft was considered at the 7 September 2022 meeting, but it was deemed to be too broad. A revised version of the draft was circulated ahead of the January 2023 meeting. The Chair, considering that a reply from the Commission was still pending, encouraged members to share their views on whether it was opportune to launch the work of the Focus Group.

- **Way forward**

Sean O'Donoghue (KFO) expressed support for continuing the work on trade policy instruments. Mr O'Donoghue complimented the Initial Focus Group on Trade for the factual and high-quality



document produced and expressed satisfaction with the amendments to the draft Terms of Reference. He wanted to know the meaning of “cumulation” in the reference to preferential rules of origin. In relation to the delivery of the final report, he argued that more time should be provided, considering the significant number of tasks foreseen.

Mike Turenhout (Visfederatie) agreed that the report of the Initial Focus Group provided relevant factual information, which was useful to better understand trade policy. The commitment of the MAC was to provide advice, on an ad hoc basis, when relevant developments in EU’s trade negotiations became publicly known, plus advice on trade policy instruments. Mr Turenhout expressed doubts that the launch of the Focus Group on Trade was the appropriate step to achieve the described goals, especially considering the time and expertise required. It could be more useful to analyse studies performed by FAO on trade.

The Chair informed that Mr Melgaard Jensen was not available to Chair the new Focus Group due to the significant time requirements and the wide scope.

Jens Høj Mathiesen (Danish Seafood Association) argued that it was preferable to wait for the Commission’s feedback before proceeding with the new Focus Group. The feedback could provide a clearer direction for the Terms of Reference.

Katarina Sipic (AIPCE) agreed with Mr Mathiesen that the feedback from the Commission would provide a better basis for future work, even if the new Focus Group does not need to be an exact sequence to the Initial Focus Group on Trade. In her view, the draft Terms of Reference were still very broad and the proposed deadline was too ambitious. Ms Sipic expressed concern about the lack of volunteers to chair the new Focus Group.

Sean O’Donoghue (KFO) stated he would not be opposed to a delay in the establishment of the new Focus Group. Mr O’Donoghue underscored that the Focus Group would not be expected to develop recommendations, but merely collecting factual information. He argued that the first task of the Focus Group (ranking of the trade policy instruments) would be quite useful. The other tasks could be defined more clearly. In his view, at the next meeting, a new discussion should be scheduled, particularly to select a Chair.

The Chair highlighted the complexity of the situation, since there were different expectations among the members and the Commission’s reply was still pending. The Chair asked Mr Turenhout for more information about the FAO’s study on the impact of trade policy instruments.

Mike Turenhout (Visfederatie) explained that FAO published studies about the impact of trade agreements. Mr Turenhout suggested that an FAO expert could be invited to present these studies at the next meeting.

Isabel Mariño Prieto (Conxemar) expressed support for Ms Sipic’s intervention. It would be preferable to wait for the Commission’s reply before proceeding with new work.



The Chair proposed to temporarily suspend the establishment of the new Focus Group on Trade until the reply of the Commission to the previous advice. The Chair suggested inviting an FAO expert to present about the FAO studies on trade policy.

Scientific, Technical and Economic Committee for Fisheries (STECF)

- **Consideration of draft advice on 2021 Economic Report on the Fish Processing Industry**

The Chair recalled that, at the previous meeting, the Working Group agreed to develop advice on the STECF Economic Report on the Fish Processing Industry. In November 2022, the Secretariat circulated a questionnaire to gather views on the report. The replies served as basis for the draft advice. The draft advice was circulated on 2 December 2022. Some preliminary comments were received.

The Working Group proceeded to consider the draft advice, starting by pending issues in section 2 and followed by a detailed consideration of the draft recommendations.

The Secretary General explained, concerning the first paragraph of section 2 “Introduction”, that, in previous advice, the MAC called for the annual publication of the report. The majority of the replies to the Secretariat’s questionnaire were favourable to a change to annual periodicity. Nevertheless, Conxemar had called to maintain the current biennial periodicity. The Secretary General wanted to know if Conxemar would seek a recorded minority position or amendments to the text.

Isabel Mariño Prieto (Conxemar) stated that it was merely a comment from their side. In the view of her organisation, it was not necessary to change the periodicity of publication of the report, but they would not oppose an annual publication.

Mike Turenhout (Visfederatie) stated that, in previous occasions, he called for an annual periodicity, but he understood Conxemar’s comment, since it would be rather difficult to gather data on the fish processing industry annually.

The Secretary General suggested the addition of a sentence to the paragraph reading “Nevertheless, it is important to recognise that, considering the necessary resources, a change to an annual basis could be difficult to achieve”.

Bruno Guillaumie (EMPA) emphasised that a change to an annual basis would be quite difficult to achieve, since it would imply amending the EU Multi-Annual Programme. Mr Guillaumie shared his experience as an expert in the STECF’s Expert Working Group on aquaculture. Some Member States did not provide data in the appropriate time and format, so data from the FAO had to be used instead.

The Chair stated that the added sentence reflected the concerns of Mr Guillaumie. In his view, the current biennial periodicity leads to less follow-up and involvement from the experts. Nevertheless, he recognised that it would be difficult to change to an annual basis.

The Secretary General provided an overview of the draft recommendations in section 4.

The Working Group agreed on the draft recommendations.



The Chair provided an overview of the remaining sections of the draft advice.

Roberto Carlos Alonso Baptista (ANFACO-CECOPESCA) suggested amending the last paragraph of section 3 “content of the report”, calling for a broader scope in the reference to the studies used in the Spanish chapter of the STECF report. The reference should not be specific to canning, but to the entire processing sector. Plus, the reference should be to public reports in general.

Bruno Guillaumie (EMPA) explained that the STECF experts are allowed to take national reports into consideration, but that the data cannot be used. As an example from his experience with the STECF report on the aquaculture sector, Spain did not provide data in the correct format by the deadline. Even though data was available on the official website of the responsible Spanish Ministry, the experts were not allowed to use that data. Data from the FAO was used instead. Mr Guillaumie asked members to be aware that, to achieve the requests in the draft advice, a legislative change would be needed. He further explained that the experts are allowed to use all available public and private expertise data in their interpretation of the data. It can be used in the modulations, but not the actual figures.

The Chair responded that, in their reply, the Commission would detail how these recommendations could be achieved. The Chair argued that the national chapters could be improved, in line with draft recommendation f).

The Working Group agreed on the amended text of the draft advice.

- **Way forward**

The Chair proposed to put forward the agreed draft advice to the Executive Committee for consideration and potential adoption.

Banning Forced Labour

- **Exchange of views among members**

The Chair recalled that, at the previous meeting, a Commission representative present the legislative proposal on banning forced labour. The legislative proposal has been sent to the Council and to the European Parliament under the ordinary legislative procedure. In the context of the MAC, it was necessary to determine the relevance of developing advice on the matter. Prior to the meeting, the issue had been discussed with several NGO representatives, who expressed interest, but lacked capacity in the short term. The Management Team suggested the possibility to hire an external consultant to develop a study on the topic. To facilitate this, draft Terms of Reference were circulated in advance of the meeting.

The Secretary General informed that, prior to the meeting, some suggestions were sent from NGO representatives to establish a Steering Committee. Furthermore, EJF expressed interest in drafting, following the external study, the first proposal of draft advice.



Daniel Voces (Europêche) informed that the social partners in sea fisheries, composed of Europêche, COGECA, and ETF, launched a European project on the topic. A consultant was hired to map EU and international legislation against forced labour both in market and customs, plus to develop policy recommendations. Mr Voces expressed support for the proposed study, but called for coordination with the study commissioned by the social partners.

The Secretary General recalled that, according to the presentation of the Commission representative at the previous meeting, there would be a database and stakeholder would be able to submit reports of forced labour. The purpose of the study would be to determine which sources could be used and which products could be affected. The Secretary General suggested that Mr Voces could join the Steering Committee, ensuring that the consultant was aware of the study commissioned by the social partners.

Paul Thomas (EAPO) asked for more information on the coordination between the external study and the work of the European Commission.

The Chair stated that, since the Commission already publicly published the legislation proposal, there would not be much influence on their work. The purpose of the study would be to understand the impact of the draft regulation on fisheries and aquaculture products.

The Secretary General recalled that, under the Common Fisheries Policy Regulation, the Advisory Councils provide recommendations to the European Commission and to the Member States. The Commission published the legislative proposal, but work was still ongoing in the Council. Interinstitutional negotiations will also take place at a later stage. Therefore, advice adopted by the MAC could advise Member States on the Council's position and in the interinstitutional negotiations.

Roberto Carlos Alonso Baptista (ANFACO-CECOPECA) underscored the importance of the topic, especially to avoid a persecutorial situation in the market. Mr Alonso wanted to know if the study commissioned by the social partners would cover processed products. He highlighted the importance of efficiency of the resources, adding that the external study should focus on the implementation of the regulation. It is important to consider other tools available in the EU.

The Chair stated that, based on the presentation of the Commission representative at the previous meeting, the scope of the regulation would not target specific products or countries, but would focus on a risk-based assessment. In the fisheries and aquaculture market, there is a significant amount of international trade, which will translate into higher scrutiny.

- **Consideration of draft Terms of Reference for external study**

The Secretary General provided an overview of the draft Terms of Reference for a study on forced labour in the fisheries and aquaculture market, including the suggestion to establish a Steering Committee to support the external consultant.

Daniel Voces (Europêche) expressed interest in participating in the Steering Committee and suggested the inclusion of Mr Juan Manuel Trujillo on behalf of ETF.



Katarina Sipic (AIPCE) volunteered to join the Steering Committee, to ensure the representation of the processing sector.

The Chair emphasised the importance of a wide representation of interest in the Steering Committee. The Chair asked for more information about the budget availability.

The Secretary General recalled that, in the past, an external consultant was hired for a performance review, but that this would be the first time hiring a consultant for a study. The Secretary General explained that, if the Working Group agreed, the draft Terms of Reference would be put forward for the consideration of the Executive Committee, including the allocation of the expense. The expense had not been foreseen in the annual budget, but through a rearrangement of funding allocated to the organisation of meetings, it should be possible to cover the cost. Approval of the European Commission is not required for amendments to the budget.

Marine Cusa (Oceana) suggested some additional topics to be addressed in the study. Under the Commission's proposal, both domestic and imported products would be forbidden. There are some instances of forced labour in the EU fleet, particularly in connection with non-EEA migrants. Ms Cusa suggested the inclusion of a point on Member States' initiatives to fight forced labour, particularly in their fleets. She also suggested an analysis of due diligence among crewing agencies. Some case studies could be used for the analysis of the crewing agencies.

The Chair stated that the draft Terms of Reference did not exclude EU production. The aim is to target products made from forced labour present in the EU market.

Daniel Voces (Europêche) informed that, in the context of the social dialogue, an external consultant had been hired to develop guidelines for migrant workers. The ILO addresses these matters, which are usually discussed between the employers, workers, and government. The consultant will be undertaking an international analysis to identify pre-conditions for international recruitment. Model contracts for fishers will be developed. The vulnerability towards crewing agencies is a challenge, so practical are required for fishing vessels owners and workers. Mr Voces offered to coordinate between this project and the external study on forced labour.

Concerning forced labour in the EU, Mr Voces recognised that the proposed legislation would apply to both domestic and imported products, but added that the level of labour abuses was not comparable. The cases of forced labour in the EU have been adequately addressed by the trade unions and are discussed in the social dialogue.

Regarding the draft Terms of Reference, Mr Voces suggested adding in section 3 "specific fisheries and aquaculture issues to be addressed" a reference to "companies" in the collection of information sources. He exemplified that, in the USA, there is a list of good produced with child and forced labour. Mr Voces also drew attention to the legislative proposal on Sustainable Corporate Due Diligence, which will also impact the catching and processing sectors.

Roberto Carlos Alonso Baptista (ANFACO-CECOPESCA) expressed concern about expanding the draft Terms of Reference too much, considering the budgetary and time constraints.



The Chair highlighted that, for a prompt procedure, the contract should be below €15000. Otherwise, the tender would be more complex and time consuming.

The Secretary General confirmed that a contract above €15000 (with VAT included) would require a more complex tender procedure with different offers and publicity. Furthermore, the commissioning of the study was not originally foreseen in the annual budget, so the allocation of funds would be more difficult for a larger expense. Taking into account that the Commission's proposal had been officially published, he argued that it was important to proceed promptly on the topic.

Marine Cusa (Oceana) agreed that it was important to coordinate with Europêche to avoid duplication of the work.

Georg Werner (EJF) stated that, even though, it would be relevant to connect to the legislative proposal on Sustainable Corporate Due Diligence, it would significantly expand the scope of the study. Therefore, it was better for the study to be focused on the legislative proposal on forced labour. Mr Werner agreed that it was important to account for the work undertaken by Europêche and other members.

Christine Absil (Good Fish) suggested that the Steering Committee could put together some sources of information to send to the external consultant before they start drafting the study.

Paul Thomas (EAPO) suggested the inclusion of a reference to the relevance of the recommendations in the context of the interinstitutional negotiations. Mr Thomas wondered if other Advisory Councils had worked on the topic of forced labour, for example the LDAC.

The Chair stated that he was not aware of work on the topics by other Advisory Councils, but encouraged members to take the floor, if they were aware.

Isabel Mariño Prieto (Conxemar) emphasised the importance of the study for the industry. Ms Mariño argued that the foreseen budget might be insufficient. The aim should be to have a relevant study, not the speed.

The Secretary General explained that he had informally contacted a consultancy company specialised in fisheries to have a better understanding of the feasibility of the request. According to this company, the timeline and budget were feasible. Nevertheless, it would depend on scope of the Terms of Reference agreed by the working group.

Katarina Sipic (AIPCE) drew attention to potential overlaps with the Commission's legislation proposal on Sustainable Corporate Due Diligence. The allocated budget and the proposed timeline could be insufficient for the necessary tasks. The two projects undertaken by the social partners should also be considered, avoiding duplication.

The Secretary General emphasised that, from the Commission's perspective, the proposal on banning forced labour and the proposal on due diligence were two separate legislative proposals. The purpose would be to develop advice specifically on the legislative proposal on banning forced labour. The Secretary General suggested the inclusion of a reference to legislative proposal on due diligence in



section 9 “documents and reference of interest”, but argued against mixing both legislative proposals in the scope of the study, since there would be challenges in terms of timing and budget, plus it would be more difficult for the Commission to reply to the advice.

The Secretary General finalised the overview of the draft Terms of Reference. To cover Ms Absil’s suggestion, he proposed to include “Provision of preliminary work documents by the Steering Committee” as a first step in the timeline. To cover Ms Cusa’s suggestion, he suggested adding a point on Member States initiatives under section 3.

Daniel Voces (Europêche) agreed with Ms Sipic that it was important for the Steering Committee to meet and provide guidance to the consultant, to avoid a too broad list of topics. Mr Voces recalled that, unlike the IUU Regulation, the legislative proposal on banning forced labour will not target entire countries, but products from companies. Any person would be able to submit a claim and national authorities can initiate an investigation if the concerns are substantiated. Mr Voces argued that it was important to consider if the advice was more about the legislation or more about the implementation phase.

The Chair stated the legislative proposal was overarching and not country specific. The aim of the consultant would be to, based on the available elements, analyse the implementation in the fisheries and aquaculture market, including targets and effects. Depending on the examples included in the study, these could be used in advice to influence the Commission and the Council.

The Secretary General agreed with the Chair’s explanation. The Secretary General emphasised that the draft Terms of Reference were mainly focused on the implementation, while allowing the consultant to include some policy and legislative recommendations. The study would be directed at the members to have informed discussions. At the June 2023 meeting, members would be able to decide on the contents of the advice.

- **Way forward**

The Chair proposed to put forward the draft Terms of Reference to the Executive Committee for consideration and potential agreement.

Illegal, Unreported and Unregulated (IUU) Fishing & Global Governance

- **Presentation of study “Water-tight? Assessing the effectiveness of EU controls to prevent illegal seafood imports” by Thomas Walsh, EU IUU Fishing Coalition**

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

Thomas Walsh (EU IUU Fishing Coalition) explained that the EU is reliant on imports. The EU IUU establishing a Community system to prevent, deter and eliminate IUU fishing establishes a catch certification scheme to help EU Member States detect and block products sourced from IUU fishing at their borders. The study focused on the biennial reports submitted by the then 28 Member States on the implementation of the IUU Regulation, covering the 2018/19 reporting period. Mr Walsh



provided an overview of the percentage of import catch certificates validated by carded non-EU countries over the reporting period.

In terms of key findings, the study investigated routine documentary checks of all import catch certificates received, the application of a risk-based approach to assessing catch certification, the verification of catch certification to ascertain compliance of imports, the physical inspections of consignments, the rejection of consignments in the case of non-compliance, and the biennial reporting on the activities under the EU IUU Regulation.

On routine documentary checks, disparities were found between the documentary checks undertaken by Member States, particularly the proportion of catch certificates that are subject to checks and the procedures involved. There are also sometimes issues with data reporting. Failure to perform the checks opens the system to abuse and the entrance of IUU fishing products.

On the risk-based approach, the study found that the application is far from harmonised across Member States. Some Member States do not apply a risk-based approach. Some Member States apply specific national risk-based criteria, while others apply the EU-level criteria. Austria is the only country using EFCA's common methodology. Mr Walsh called for a more harmonised approach across the Member States, in line with the EU's risk criteria or with EFCA's common methodology.

On verification of catch certificates, the study found that the number of verification requests sent by Member States to non-EU countries pales with the number of catch certificates received annually. Spain was the best performer, while several Member States failed to requested verifications. Mr Walsh argued that, considering the scale of the EU's import, more requests would be expected. He added that there should also be a correlation with the risk of IUU fishing products.

On physical inspections of consignments for direct landings, Mr Walsh recalled that, under the EU IUU Regulation, Member States are legally required to inspect at least 5% of direct landing operations in ports. Several Member States are exceeding the amount. As an example, Spain was significantly above the requirements. There were a few Member States failing to meet the requirements, for example Denmark in 2019 and Poland in 2018 and 2019. According to other sources, since 2019, Denmark has met the 5% requirement, while Poland continues to miss the requirement.

On physical inspections of consignments for freight consignments, in the 2018/19 period, seven Member States failed to carry out physical inspections of import consignments: Belgium, Czech Republic, Finland, Greece, Hungary, Latvia, and Romania. Between the other Member States, physical inspections of import consignments vary in terms of how consignments are selected for inspection, the competent authorities responsible for carrying out the inspections, and the quantity of inspections.

On the rejection of consignments in the case of non-compliance, the number of rejections was very low. Over the 2018/19 period, only 47 import consignments were rejected by Member States. Mr Walsh stated that, given the quantity of imports into the EU, a much higher number of rejections was expected. Since 2012, there is a trend of decreased rejections. No trend was seen for increased rejection by Member States with higher risk imports.



On the biennial reporting to the Commission, although Member States reserve the right to withhold information the publication, the information provided to the EU IUU Fishing Coalition has generally improved over time. Certain sections within the biennial reports for the 2016/17 and 2018/19 reporting periods provided by the European Commission in response to an “access to information” request were redacted by some Member States. Several identified improvements could be made to the reporting template, as some non-specific questions result in a lack of consistent responses from Member States and differences in the level of detail provided.

In conclusion, Mr Walsh stated that the main finding was that implementation of the EU IUU Regulation was not harmonised between Member States. Some Member States are performing much better in the implementation of the regulation. There was no significant improvement since the 2017 study of the EU IUU Coalition. Until Member States are aligned in the implementation, there is a risk of “control shopping” by importers of IUU fishing products. He emphasised that it is important to note that several Member States, for example Spain, are performing well with regards to the implementation of the EU IUU Regulation, but the variation in implementation of the regulation weakens the entire EU import control scheme, opening the system up to abuse.

Mr Walsh provided an overview of suggested recommendations to the European Commission: continue to strive towards a consistent application and implementation of import control procedures across the EU, including catch certificates checks and a risk-based approach and verifications; initiative infringement procedures against Member States who fail to meet the requirements of the EU IUU Regulation; audit Member States to verify the submitted information; hold Member States accountable for failure to uphold key requirements; standardise risk analysis criteria and benchmarks for the verification of high-risk catch certificates and inspection of consignments; encourage Member States to engage with CATCH IT; and support Member States’ authorities responsible for imports.

Mr Walsh also provided an overview of suggested recommendations to the Member States: allocate sufficient capacity and resources; ensure that the necessary procedures are in place for the legal adoption of the CATCH IT system; establish and apply a standardised EU-wide approach to risk analysis; apply standardised and thorough verification and inspection procedures of higher-risk catch certificates and consignments; and ensure comprehensive data submission for the biennial reports.

The Chair highlighted that, once the CATCH IT system is in force, the situation is expected to improve, so it would be relevant to undertake another study then.

- **Presentation of study on IUU risks in Spanish market by María del Camino Troya, EU IUU Fishing Coalition**

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

María del Camino Troya (EU IUU Fishing Coalition) explained that the report investigated the risks of IUU fishing products entering the Spanish seafood trade supply chain, while focused on three high risk species: Atlantic bluefin tuna, squid, and swordfish.



Concerning Atlantic bluefin tuna, there are high risks evidenced by illegal trade flows identified from Operation Tarantelo. These are entering the EU market through Malta and re-exported to Spain and other countries. There is a high IUU risk in the context of intra-EU trade. For squid, there is unregulated activity outside of the competence of some Regional Fisheries Management Organisations, including in the South-eastern Pacific Ocean, North-western Indian Ocean, and Southwestern Atlantic Ocean. There is deactivation of the Automatic Identification System by Chinese and Spanish fleets. As for swordfish, there is significant unreported activity and imports from carded countries. The trend has been to import these products via Portugal and then traded into other Member States.

Ms del Camino provided suggestions for mitigation and recommendation for companies: consider IUU in their due diligence procedures; map out their supply chains, particularly for higher risk species; use existing voluntary tools such as standard PAS 1550 to help due diligence; and apply the voluntary tool to combat human rights abuses in their supply chains.

- **Exchange of views & way forward**

Mike Turenhout (Visfederatie), in relation to the decrease in rejections of consignments in the previous years, asked whether it was not a positive sign of the implementation of the EU policy against IUU fishing, which prevented the occurrence of rejections.

Thomas Walsh (EU IUU Fishing Coalition) agreed that the decrease could be seen as a positive sign that the Member States are receiving all the necessary information when submitting requests to non-EU countries. Nevertheless, considering the very significant number of catch certificates received every year, Mr Walsh expressed scepticism that only 47 consignments were the product of IUU fishing. Several rejections were simply because the non-EU country did not reply to the information request submitted by a Member State. In his view, it demonstrated the need for improved risk-based assessment. The number of verification requests should be higher.

Jaroslaw Zieliński (PFPA) wanted to know if the reference to “non-compliance” was about the Member States or the operators. Mr Zieliński also asked for Mr Walsh’s view on the role of CCTV in combatting IUU fishing.

Thomas Walsh (EU IUU Fishing Coalition) responded that the study was about non-compliance of the requirements under the EU IUU Regulation by Member States.

The Chair highlighted that CCTV was not related to the topic of the study, which was about the verification of catch certificates in the context of the EU IUU Regulation.

Vanya Vulperhorst (Oceana) stated that, based on the information gathered from the different presentations, the Working Group should proceed with the drafting of advice on the topic. Ms Vulperhorst argued that clearly there were problems in the EU market, since, for example, Italy received almost 100.000 catch certificates per year, but only asked for one verification in the 2018/19 period. The European Court of Auditors reached a similar conclusion.



Daniel Voces (Europêche), in relation to the reference to deactivation of the Automatic Identification System, wanted to know if these were being sanctioned by any Member State. Mr Voces also wanted to know if the Vessel Monitoring System had been deactivated. He recalled that the Vessel Monitoring System was the actual tool for fisheries control purposes, while the Automatic Identification System was merely an obligational tool. He asked if the reasons for the deactivation were known, since, sometimes, the systems must be deactivated due to safety reasons.

María del Camino Troya (EU IUU Fishing Coalition) responded that the study only assessed the Automatic Identification System and that no sanctions were known. The Automatic Identification System can be deactivated due to safety reasons, but these were consistent deactivations in the Argentinian Exclusive Economic Zone.

Roberto Carlos Alonso Baptista (ANFACO-CECOPECA) highlighted that the first document presented was quite positive of the activities of the Spanish operators, while the second document was quite negative. Spain, as the largest producing and processing country and as one of the main markets, was making significant efforts. Mr Alonso encouraged the NGOs to pursue harmonisation in the EU.

Pim Visser (VisNed) underscored the difference between the Automatic Identification System and the Vessel Monitoring System, since accusations against the fleet were constantly made based on data from the Automatic Identification System, but the only verifiable data was from the Vessel Monitoring System.

The Chair proposed the development of advice on the topic of IUU fishing based on the presentations from the current meeting and the previous one.

Georg Werner (EJF) volunteered to develop a first proposal of draft advice, based on the presentations, for consideration at the next meeting of the Working Group.

The Chair reiterated his expectation that, once the CATCH IT system enters into force, the situation will improve in the EU. Nevertheless, it was important to adopt advice on the topic of IUU fishing in the meantime.

Daniel Voces (Europêche), considering that, in several previous occasions, the MAC adopted advice about IUU fishing, asked about the aim of the new draft advice. Mr Voces expressed concerns about the generalisation of problems and the lack of specifics.

Georg Werner (EJF) responded that, as exemplified by Ms Vulperhorst, there was a problem of harmonisation in the EU. Mr Werner added that it was unclear for how much longer the existing control system would be in force, but, at least, for two more years. Based on the presentations, there were certain conclusions that could be drawn for the CATCH IT system.

AOB

None.



Summary of action points

- Focus Group on Trade:
 - Establishment of the new Focus Group on Trade to be on hold until the Commission replies to the previous advice on trade policy instruments
 - Under the draft agenda of the next meeting, FAO to be invited to present their study on the impact of trade instruments on the fisheries and aquaculture market
- Scientific, Technical and Economic Committee for Fisheries (STECF):
 - Agreed draft advice to be put forward to the Executive Committee for consideration and potential approval
- Banning Forced Labour:
 - Agreed draft Terms of Reference to be put forward to the Executive Committee for consideration and potential agreement, including of the associated expense
- Illegal, Unreported and Unregulated (IUU) Fishing & Global Governance:
 - Based on the presentations at the 19 September 2022 and 26 January 2023 meetings, proposal of draft advice to be developed by EJF for consideration at the next meeting



Attendance List

Representative	Organisation	Role
Alen Lovrinov	Omega 3 Producers Organisation	Member
Alexandre Bonneau	SNCE	Member
Alonso Abreu Lozano	Asociación de Armadores Punta del Moral (OPP80)	Member
Anna Boulova	FRUCOM	Member
Anna Rokicka	Polish Association of Fish Processors (PSPR)	Member
Asmira Sophie Sandermann	European Fishmeal	Member
Bruno Guillaumie	European Molluscs' Producers Association (EMPA)	Member
Catherine Pons	Federation of European Aquaculture Producers (FEAP)	Member
Christine Absil	Good Fish	Member
Christophe Vande Weyer	European Commission	Expert
Daniel Voces	Europêche	Member
Eduardo Míguez	OPP77 Puerto de Celeiro	Member
Elena Garcia Caballero	Spain	Observer
Fabián Ben Conde	Federación Nacional de Cofradías de Pescadores (FNCP)	Member
Francesca Peretti	ClientEarth	Member
Garazi Rodríguez Valle	APROMAR	Member
Georg Werner	Environmental Justice Foundation	Member
Isabel Mariño Prieto	Conxemar	Member
Jaroslav Zieliński	Polish Fish Producers Association (PFPA)	Member
Javier Ojeda	Federation of European Aquaculture Producers (FEAP)	Member
Jens Høj Mathiesen	Danish Seafood Association	Member
Jérémie Souben	FEDOPA	Member
José Carlos Escalera Aguiar	Federación de Cofradías de Pescadors de Cadiz (FECOPESCA)	Member
Juana Maria Parada Guinaldo	OR.PA.GU.	Member





Market Advisory Council

Representative	Organisation	Role
Katarina Sipic	EU Fish Processors and Traders Association (AIPCE) / European Federation of National Organizations of Importers and Exporters of Fish (CEP)	Member
Laurère Jolly	European Commission	Expert
María del Camino Troya	EU IUU Fishing Coalition	Expert
Marine Cusa	Oceana	Member
Massimo Bellavista	COPA COGECA	Member
Mike Turenhout	Visfederatie	Member
Miguel Lizaso	European Commission	Expert
Nicolás Fernández Muñoz	OPP72 – Organización Productores Pesqueros Artesanales Lonja de Conil	Member
Olivier Hottlet	FRUCOM	Member
Patrick Murphy	Irish South & West Fish Producers Organisation (IS&WFPO)	Member
Paul Thomas	European Association of Fish Producers Organisations (EAPO)	Member
Pedro Reis Santos	Market Advisory Council (MAC)	Secretariat
Pierre Commère	Association Des Entreprises de Produits ALimentaires Élaborés (ADEPALE)	Chair
Pim Visser	VisNed	Member
Rafael Piñero Scarapachini	EuroCommerce	Member
Roberto Carlos Alonso Baptista	ANFACO-CECOPECA	Member
Rosalie Tukker	Europêche	Member
Thomas Walsh	EU IUU Fishing Coalition	Expert
Tintti Vitikkala	Market Advisory Council	Secretariat
Sally Frankcom	EU IUU Fishing Coalition	Observer
Sean O'Donoghue	Killybegs Fishermen's Organisation (KFO)	Member
Sergio López García	OPP Puerto de Burela	Member
Vanya Vulperhorst	Oceana	Member
Yobana Bermúdez	Asociación Española de Mayoristas, Importadores, Transformadores y Exportadores de Productos de la Pesca y Acuicultura (CONXEMAR)	Member

