

WORK PROGRAMME FOR MARKET AC

Period: 01/10/2024 to 30/09/2025 (Year 9)

Background

As determined by point (b) of paragraph 2 of Article 43 of the Common Fisheries Policy Regulation, the Market Advisory Council (MAC) was established to promote a balanced representation of all stakeholders and to contribute to the achievement of the policy's objectives in the field of the EU market of fisheries and aquaculture products. The MAC was founded in 2016 under the legal form of a non-profit organisation based in Brussels and co-funded by the European Commission.

The General Assembly of the MAC is composed of 74 European, national and local organisations from 13 Member States (Belgium, Croatia, Denmark, France, Germany, Greece, Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden), representing the entire value chain (fisheries producers, aquaculture producers, processors, traders, suppliers, retailers, trade unions) and other interest groups (environmental and development NGOs). The Executive Committee of the MAC is currently composed of 21 members distributed in the following manner:

Value Supply Chain (60%)	
Primary Producers (Catching)	
	EAPO
	Europêche
	COPA-COGECA
	Killybegs Fishermen's Organisation
	Les Pêcheurs de Bretagne
Primary Producers (Aquaculture)	
	EMPA
	FEAP
Processors, traders, suppliers and retailers	
	AIPCE
	CEP
	European Fishmeal
	EuroCommerce
	FEDEPESCA
	CONXEMAR
	ANFACO-CECOPECA
Workers (Trade Unions)	
	ETF
Other Interest Groups (40%)	
	MSC
	Oceana
	WWF
	ClientEarth
	EJF
	Good Fish

In line with Article 7a of Commission Delegated Regulation (EU) 2015/242, the MAC subjected itself to an independent performance review, which resulted in the adoption of a report in March 2022¹.

¹ <https://marketac.eu/performance-review-2019-2022/>

Mission and objectives of the MAC

MAC WORK PRIORITIES

Overarching long term and short-term work priorities (at least 3 priorities)

1) Common Fisheries Policy & Common Market Organisation

In March 2024, Commissioner Sinkevičius announced a full evaluation of the Common Fisheries Policy (CFP) Regulation. The evaluation will be carried in accordance with the Commission's Better Regulation Guidelines and will examine its functioning and impact across five evaluation criteria: effectiveness, efficiency, relevance, coherence, and added value.

As one of the pillars of the CFP, the Common Market Organisation (CMO) will be part of the evaluation. The evaluation will assess how the current CMO Regulation has contributed to achieving the objectives of the CFP. To support this analysis, an external study on Producer Organisations and consumer information will be launched.

In the past, the MAC adopted advice on the functioning of the CFP² and on the functioning of the CMO³ to assist the European Commission in the preparation of the corresponding implementation reports.

2) Trade Agreements & Trade Policy Instruments

The EU market is heavily dependent on imported supplies to meet consumer demand. As part of its work to improve understanding of consumption trends and price developments, the MAC will continue to monitor and offer advice on both offensive and defensive opportunities in relation to the various ongoing EU negotiations with third countries on possible new free trade deals. The EU market is not only affected by multilateral and bilateral trade agreements, but also by other policy instruments such as the Generalised Scheme of Preferences (GSP, Everything But Arms, GSP+) and the ATQs Regulation.

Moreover, the Commission is expected to launch a call for evidence and a public consultation on the inclusion of sustainability provisions in the ATQs Regulation. The MAC will look into preparing advice, in the context of the issues raised in the context of this public consultation and the call for evidence.

As an example of the continuous relevance of this priority, under the sixth operational year, the Initial Focus Group on Trade prepared a report on existing EU trade policy instruments and their impacts on the EU market⁴, which led to the adoption of advice on the improvement of data concerning trade policy instruments and their impact⁵. More recently, the MAC adopted advice on the negotiations of the EU – Thailand FTA⁶.

3) Illegal, Unreported and Unregulated (IUU) Fishing

The EU is a pioneer in the global fight against IUU fishing and the European Commission has taken a leadership position by promoting a “zero-tolerance” approach to IUU fishing. The EU IUU Regulation established an EU-wide system to prevent, deter and eliminate the import of IUU fishery products into the EU market and promotes reforms in third countries through its “carding system”. The Commission services have continuously updated the MAC on the cooperation with third countries and corresponding evaluations to promote reforms. As practice from previous

² <https://marketac.eu/advice-on-the-functioning-of-the-cfp/>

³ <https://marketac.eu/2022-report-on-the-functioning-of-the-common-market-organisation-cmo/>

⁴ <https://marketac.eu/wp-content/uploads/2022/03/Initial-Focus-Group-on-Trade-Report-21.03.2022.pdf>

⁵ <https://marketac.eu/trade-policy-instruments-and-impact-on-the-eu-market-for-fishery-and-aquaculture-products-improvement-of-data/>

⁶ <https://marketac.eu/negotiation-of-eu-thailand-free-trade-agreement/>

years, the MAC will continue to produce advice to the European Commission on an *ad hoc* basis when significant cases of IUU fishing products entering the EU market are known or when actions take place under the “carding system”⁷.

4) Forced Labour

Forced labour and other human rights violations can be present on-board fishing vessels and throughout the supply chain. In the past, the MAC has provided advice concerning the occurrence of forced labour in the market of fishery and aquaculture products⁸. The MAC will continue to advise on this matter, also when it includes products coming from IUU fishing.

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

As the European Commission’s market intelligence tool, EUMOFA increases market knowledge, analyses EU market dynamics and helps better informed business decisions and policymaking. The ex-post information provided by EUMOFA on volumes, values and prices of fisheries and aquaculture products, including imports and exports, is greatly appreciated by the members for the MAC. Among these, the annual “The EU Fish Market” has particular importance and the MAC aims to maintain the established annual exchange of views on this report.

In line with previous practice⁹, the MAC will continue to provide suggestions for the annual work programme of EUMOFA, including on species profiles, thematic analyses, price structure analyses, and EUMOFA Talks.

6) Landing Obligation

In line with Article 15(14) of the CFP Regulation, the European Commission reports annually on the implementation of the landing obligation based on information transmitted by the Member States, the Advisory Councils and other relevant sources. The landing obligation can have a significant socioeconomic impact on the market, including through the need for outlets for catches below minimum conservation reference sizes and the development of new market segments for unwanted catches. Due to the permitted discards under temporary exemptions to the landing obligation, there might also be problems of data availability and quality, which impacts the reliability of information, on a regional basis, on the market effects of the implementation of the landing obligation. As stated in previous MAC advice on the topic¹⁰, the effects of undersize fish on the market appear to be negligible. In the upcoming operational year, it is relevant to analyse whether new developments will take place.

7) Scientific, Technical and Economic Committee for Fisheries (STECF)

The MAC has an established collaboration with STECF, which is particularly focused on the Annual Economic Report on the EU fishing Fleet, the Economic Report of the EU Aquaculture Sector, and the Economic Report of the EU Fish Processing Industry. The practice includes presentations and exchanges of views on the mentioned reports. The MAC will also aim to ensure representation, as observers, in the relevant STECF Expert Working Group meetings. When appropriate, the MAC will also provide feedback on the reports, promote the submission of additional data by the members, and suggest topics of specific analysis, such as species, fleet segments, and geographical areas that should be considered by STECF, as well as more detailed data on aquaculture and processing¹¹.

8) Fisheries Control Regulation

⁷ E.g., <https://marketac.eu/iuu-fishing-by-ghana/>

⁸ E.g., <https://marketac.eu/forced-labour/>

⁹ <https://marketac.eu/suggestions-for-eumofa-work-programme-2024/>

¹⁰ <https://marketac.eu/2022-implementation-of-landing-obligation/>

¹¹ See e.g., <https://marketac.eu/stecfs-annual-economic-report-on-the-eu-fishing-fleet-2024/>, <https://marketac.eu/inclusion-of-indicators-of-economic-sustainability-in-the-stecfs-eu-aquaculture-sector-report/>, <https://marketac.eu/stecfs-economic-report-on-the-fish-processing-industry-2021/>

Following five years of negotiations on the revision of the EU fisheries control system regulation, the new regulation (EU) 2023-2842 was published on 20 December 2023, and its provisions will progressively enter into force between 10 January 2024 and 10 January 2029. From a market-perspective, several provisions of the revised Fisheries Control Regulation are quite relevant for the entire supply chain, particularly on the traceability of fishery and aquaculture products and the new CATCH IT tool. The relationship between these provisions and the CMO Regulation, particularly on labelling and information to consumers is also especially relevant.

Under the eight operational year, the MAC adopted advice on the Terms of Reference of the study on feasible traceability systems and procedures for prepared and preserved fishery and aquaculture products¹². The MAC will continue to assist the Commission in the implementation of the new provisions of the Fisheries Control Regulation, particularly the development of the upcoming delegated acts and the entry into force of the digital Catch certificate (CATCH IT tool).

Work priorities identified for each Working Group and Focus Group (where available)

Working Group 1 (EU Production):

- Common Market Organisation (production and marketing plans, producers and interbranch organisations, planning, stabilisation of markets)
- European Maritime and Fisheries and Aquaculture Fund
- Marketing Standards framework
- Implication of Fisheries Control Regulation on EU production
- Landing obligation (e.g., available uses, market outlets, effects on prices, socioeconomic aspects, infrastructure and cooperation across the supply chain)
- EUMOFA's work programme (species profiles, case studies, conferences)
- Economic viability of the fleet and of the aquaculture sector (collaboration with STECF)
- Sustainability criteria for fishery and aquaculture products

Working Group 2 (EU Markets):

- Supply (annual status and trends)
- Trade with third countries (Community Customs Code, General System of Preferences, Free Trade Agreements, Economic Partnership Agreements, World Trade Organisation)
- Imports and tariffs (tariff suspensions, tariff quotas)
- Price developments "from sea to table"
- Market trends and consumer behaviour (responsible sourcing and processing)
- Banning IUU fishery products from entering the EU market, fight against forced labour, due diligence
- Implication of Fisheries Control Regulation EU market (traceability along the supply chain/ transmission of consumer information)
- Economic performance of the EU fish & seafood processing sector (collaboration with STECF)

Working Group 3 (EU Controls and Sanitary Issues, Consumer Rules):

- Consumer information and labelling (FIC and CMO)
- Voluntary information, including certification schemes

¹² <https://marketac.eu/terms-of-reference-of-the-study-on-feasible-traceability-systems-and-procedures-for-prepared-and-preserved-fishery-and-aquaculture-products/>

- Hygiene and sanitary issues
- Plastic and marine pollution
- Substantiation and communication of explicit environmental claims
- Product Environmental Footprint Category Rules for Marine Fish

Other possible issues of interest:

- Consideration of initiatives and policies of the new Commission (2025-2029)
- Farm to Fork Strategy initiatives (e.g., Sustainable Food System Framework, animal welfare rules, targets for food waste reduction, promotion programme, food contact materials)
- EU taxonomy and technical screening criteria for fishing and aquaculture activities
- Energy transition of the EU's fisheries and aquaculture sector
- Action Plan to protect and restore marine ecosystems
- EU Algae Initiative
- Indicators for fishery and aquaculture products, dealing with environmental, social, and economic sustainability

Planned recommendations for year 9:

No	Issue/subject	Link with the CFP	WG/FG at the origin of the recommendation	Planned date of adoption (if available)
1	Consumer information on fishery and aquaculture products, particularly in the context of the HORECA Sector (jointly with AAC)	Article 2.5.g)	WG3	October 2024
2	2024 Annual Economic Report on the EU Fishing Fleet	Article 2.5.c)	WG1	January 2025
3	Evaluation of the Common Fisheries Policy Regulation	Article 2	WG1, WG2, WG3	January 2025
4	Evaluation Common Market Organisation (under the overall full evaluation of the Common Fisheries Policy Regulation)	Article 2.5.g)	WG1, WG2, WG3	January 2025
5	Annual report on the implementation of the landing obligation	Article 2.5.a)	WG1	March 2025
6	Market-related aspects of the revised Fisheries Control Regulation	Article 2.5.g)	WG2	May 2025
7	Work Programme of EUMOFA, including suggestions of case studies and talks	Article 2.5.g)	WG1	May 2025
8	Fights against Illegal, Unreported and Unregulated (IUU) Fishing & Forced Labour, Due diligence	Article 2.5.g)	WG2	September 2025
9	Trade (e.g., FTAs, ATQs, GSP)	Article 2.5.e)	WG2	September 2025
10	Economic Report on the EU Aquaculture Sector	Article 2.5.c)	WG1	September 2025

Planned participation to Commission public consultations

Topic/subject	Link with the CFP	Deadline for the EU Survey (if available)	Planned date for adoption (if available)

MAC planning of meetings

MAC PLANNING OF MEETINGS (from 01/10/2024 to 30/09/2025)

No	Date (for the first 6 months, please provide precise dates)	Topics / Subjects of meeting	Type of meeting (physical/planned/hybrid)	European Commission participation requested (yes/no)	If Commission participation requested, specific issues to be dealt with	Priority for a Commission participation (from 1 to 4) (1= highest priority)
1	November 2024	- EU Producer Organisations (sharing of good practices, projects, management measure)	Workshop Physical (Brussels)	Yes	- Production and Marketing Plans	1
2	January 2025	- CMO, CFP - Annual Economic Report on the EU Fishing Fleet	Working Group 1 Physical (Brussels)	Yes	- Presentation of Annual Economic Report on the EU Fishing Fleet	2
3	January 2025	- EUMOFA's EU Fish Market Report - Trade - AIPCE's Finfish Study	Working Group 2 Physical (Brussels)	Yes	- Presentation of EUMOFA EU Fish Market - Update on trade developments	2
4	January 2025	- Consumer Information	Working Group 3 Physical (Brussels)	Yes	- Update on external study on consumer information	2
5	January 2025	- Formal approval of work programme & budget	General Assembly Physical (Brussels)	No		
6	January 2025	- Adoption of advice	Executive Committee Physical (Brussels)	No		
7	March 2025	- Landing Obligation	Working Group 1 Online (Zoom)	Yes		2
8	March 2025	- Trade - IUU Carding System	Working Group 2 Online (Zoom)	Yes	- Update on trade developments - Update on IUU carding system	2
9	March 2025	- Farm to Fork Strategy	Working Group 3 Online (Zoom)	Yes	- Strategic dialogue & EU agri-food chain observatory	2

10	March 2025	- Adoption of advice - Update on work and finances	Executive Committee Online (Zoom)	No		
11	May 2025		Working Group 1 Physical (Brussels)	Yes		2
12	May 2025	- Fisheries Control Regulation	Working Group 2 Physical (Brussels)	Yes	- Update on Fisheries Control Regulation	2
13	May 2025	- Food safety	Working Group 3 Physical (Brussels)	Yes	- Update on food safety matters	2
14	May 2025	- Update on work done and finances - FAO COFI Trade Sub-Committee	Executive Committee Physical (Brussels)	Yes	- Update on EU's position at the FAO COFI Sub-Committee on Trade	2
15	July 2025	- Preparation of draft work programme and budget of the next operational year	Executive Committee Online (Zoom)	No		
16	September 2025	- STECF biennial Economic Report	Working Group 1 Physical (Brussels)	Yes	- Presentation of the biennial economic report	2
17	September 2025	- Trade	Working Group 2 Physical (Brussels)	Yes	- Update on trade developments	2
18	September 2025	- Farm to Fork Strategy	Working Group 3 Physical (Brussels)	Yes	- Update on Farm to Fork Strategy initiatives	2
19	September 2025	- Update on work done and finances	Executive Committee Physical (Brussels)	No		