

## Advice

### Vision for Fisheries, Aquaculture and their Market in 2040

Brussels, 15 July 2025

#### 1. Background

Under his mission letter, Commissioner Kadis is committed to the preparation of a vision for the fisheries sector with a 2040 perspective<sup>1</sup>. In the view of the Market Advisory Council (MAC), the upcoming communication should also be a vision for aquaculture and for the entire supply chain, including processing, trading, retail, and consumers.

On 19 February 2025, the Commission published the communication for “A Vision for Agriculture and Food”<sup>2</sup>, which includes several commitments for future actions. The MAC welcomes that the fisheries and aquaculture sectors are positively mentioned, including the recognition that fisheries is a strategic sector for the Union that provides safe, high-quality food. The MAC also welcomes the recognition of fishers as custodians of nature, and that fishers and food businesses are innovators and entrepreneurs. Food policy should always include fishery and aquaculture products (“blue foods”). However, the MAC notes with concern the lack of concrete policy actions – aside from the “Vision for Fisheries and Aquaculture 2040” – and that no fisheries and aquaculture value chain stakeholders have been accepted in the newly established “High-Level Group on Agriculture and Food”.

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<sup>1</sup> [https://commission.europa.eu/document/028ce7d5-e328-4416-8f0d-35c8884acaa8\\_en](https://commission.europa.eu/document/028ce7d5-e328-4416-8f0d-35c8884acaa8_en)

<sup>2</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52025DC0075>

For the upcoming vision for fisheries and aquaculture, several sector-specific aspects, such as generational renewal, sectoral support, the status of ocean and marine biodiversity, transparency across the supply chain, the environmental footprint of fishery and aquaculture products, decarbonisation efforts, and contribution to coastal communities, also need to be considered. Other general issues, such as consumer information and interest on food products, food safety, trade policy, competitiveness, resilience, administrative burden, social dimension, and due diligence on environment and human rights, are also relevant.

## **2. Coverage of the three pillars of sustainability (environmental, social, and economic)<sup>3</sup>**

In line with the concept of sustainability provided by Article 2.1 of the Common Fisheries Policy Regulation, when considering sustainability, the three pillars must be considered: environmental, social, and economic.

## **3. Recognition of the scientifically demonstrated health and environmental benefits, including lower comparative carbon footprint, of fishery and aquaculture products<sup>4</sup>**

In terms of nutritional characteristics, fishery and aquaculture products are a source of energy and protein with high biological value and contributes to the intake of essential nutrients, such as iodine, selenium, calcium, and vitamins A and D, with well-established health benefits. Scientific evidence shows health benefits from the intake of fatty acids, such as omega-3. Moreover, seafood in general is also a source of n-3 long chain polyunsaturated fatty acids, with fatty fish offering particularly high amounts, and is a component of dietary patterns associated with good health.

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<sup>3</sup> [MAC Advice on “Development of Fishery Sustainability Indicators by STECF” \(30 January 2025\)](#)

<sup>4</sup> [MAC Advice on “Health and Environmental Value of Seafood” \(8 December 2021\)](#)

In terms of environmental characteristics, in comparison with other protein sources, fishery and aquaculture products generally have a lower carbon footprint, require little terrestrial surface and freshwater, and benefit from the biological efficiency of aquatic animals<sup>5</sup>. Furthermore, all the socio-environmental impacts of fishery and aquaculture should be considered for all wild-caught and farmed products. The sector should aim at minimising its negative impacts on the environment and climate. The sector should also aim to support, enhance and highlight the positive impacts.

In the recent years, the patterns of food consumption in the EU have changed. There is an increase in the consumption of processed foods high in saturated fat, free sugars and salt. Lack of consideration for dietary guidelines is widespread among both adults and children. Dietary factors are a leading cause of mortality and morbidity in Europe, contributing to hypertension and cardiovascular diseases, overweight/obesity, type 2 diabetes and some types of cancer. At the societal level, these developments also have an impact on the budget of public authorities to address public health policy.

#### **4. Recognition of the fisheries and aquaculture value chain as strategic to ensure food security in the EU and globally, while also accounting for the global competition for aquatic proteins<sup>6</sup>**

In terms of consumption, the EU's internal market is one of the largest markets of fishery and aquaculture products in the world. In 2022, an estimated 10,48 million tonnes fishery and aquaculture products were consumed in the EU-27. For the EU-27, the per-capita apparent

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<sup>5</sup> The [EAT-Lancet Commission Report on “Healthy Diets From Sustainable Food Systems” \(2020\)](#), when considering the required dietary shifts towards healthy diets within planetary boundaries by 2050, indicates that the consumption of fishery and aquaculture products, an “emphasised food”, should be maintained or even increased, while the intake of red meat should be limited (pp. 12-13).

<sup>6</sup> [MAC Advice on “Contingency Plan for Ensuring Food Supply and Food Security” \(28 May 2021\)](#)

consumption was of 23.51 kg (live weight equivalent)<sup>7</sup>. As the self-sufficiency rate stands at 30%, the EU is vulnerable to market fluctuations, price volatility, international competition, and geopolitical risks.

The world population is projected to reach 9.7 billion by 2050. Maintaining through to 2050 the global per capita apparent consumption of aquatic animal foods at the 2022 estimated level of 20.7 kg would require an increase in the total supply of aquatic animal foods of 36 million tonnes (live weight equivalent), representing a 22 percent rise. According to the FAO, on the worldwide scale, meeting the demand for greater availability of aquatic animal foods necessitates higher production. Depending on the region, the required increase in supply may be sourced from increased domestic production and supplemented by imports<sup>8</sup>.

## **5. Ensuring sustainable and sufficient supply through the sustainable exploitation of fishery resources and the sustainable growth of aquaculture**

Through the improvement of the state of target fish stocks caught in the EU, in accordance with the Maximum Sustainable Yield objective, the Common Fisheries Policy Regulation positively contributed to the long-term management of fish populations, even though there are challenges related to fish stocks fluctuations and uncertainty in supply. However, the total EU catch in 2023 was an estimated 3.3 million tonnes live weight. This new low in catches was well beneath the estimated 4.6 million tonnes in 2017 and 2018 and much lower still than the 5.9 million tonnes caught in 2001<sup>9</sup>, jeopardising food sovereignty.

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<sup>7</sup> [EUMOFA, The EU Fish Market \(2024\)](#)

<sup>8</sup> [FAO, The State of World Fisheries and Aquaculture 2024](#)

<sup>9</sup> [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Fisheries - catches and landings](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Fisheries_-_catches_and_landings)

According to the latest Commission Communication<sup>10</sup>, the EU fishing fleet shrank by roughly 3% in vessel numbers, 5% in gross tonnage, and 3% in engine power during 2024. As of 1 January 2025, the fleet comprised 69,570 vessels. In comparison, the fleet numbered 83,734 vessels in 2013<sup>11</sup>, a decline of about 17 % over twelve years. Moreover, compared with the 96,000 vessels in 2000<sup>12</sup>, this marks a 28 % reduction. This ongoing alarming downward trend is a significant concern for the maritime socio-economic sustainability. Even more when the average age of the EU fleet is over 31 years.

While, worldwide, the aquaculture sector has reached record production levels<sup>13</sup>, the EU aquaculture sector has stagnated since 2020 due to administrative requirements, limited access to space and water, trade-related aspects, and governance issues. More alarming, some segments of the EU aquaculture sector, such as shellfish production, significantly declined their production volume<sup>14</sup>. In 2022, the EU aquaculture sector's production accounted to 27.7% of EU aquatic food production<sup>15</sup>. In line with Recital (4) of the mentioned Regulation, the Common Fisheries Policy should contribute to increased productivity of fishing and aquaculture activities, which would improve the self-sufficiency rate of the EU market.

It is also important that companies adopt robust traceability measures within their businesses and across their supply chains. This includes the transmission of Key Data Elements, essential for tracing fishery and aquaculture products from the fisheries and farms of origin in accordance

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<sup>10</sup> [European Commission, Communication “Sustainable fishing in the EU: state of play and orientations for 2026” \(6 June 2025\)](#)

<sup>11</sup> [STECF, The 2015 annual economic report on the EU fishing fleet](#)

<sup>12</sup> [FAO, The State of World Fisheries and Aquaculture 2002](#)

<sup>13</sup> [FAO, The State of World Fisheries and Aquaculture 2024](#)

<sup>14</sup> [STECF, The 2024 Aquaculture Economic Report](#)

<sup>15</sup> [EUMOFA, The EU Fish Market \(2024\)](#)

with the Common Market Organisation Regulation and the revised EU Fisheries Control Regulation.

In the future, the EU should maintain the “zero-tolerance approach” to Illegal, Unreported, and Unregulated fishing, including through the effective implementation of import control rules across Member States. The EU will also have to continue international actions and cooperation against Illegal, Unreported and Unregulated fishing on a worldwide scale, including through coordination with the major market States (e.g., USA, Japan, China, India)<sup>16</sup>.

**6. Ensuring a level-playing-field in the EU market and trade with fair conditions, including on the application of equivalent production and sustainability standards to products imported from third countries<sup>17</sup>**

In terms of trade, the EU’s internal market is the second largest market of fishery and aquaculture products. In the context of trade policy, to ensure fair competition between operators, all fishery and aquaculture products placed on the internal market should be expected to meet the same or equivalent production and sustainability standards. While trade relationships contribute to economic development in third countries, the EU should ensure, through responsible sourcing, that there is not an outsourcing of externalities, so that it does not threaten the stability and the security of other regions.

**7. The contribution to the economy and culture, including gastronomic traditions, of rural and coastal communities<sup>18</sup>**

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<sup>16</sup> [MAC Advice on “Better Alignment of Import Control Schemes in Major Market States” \(28 September 2020\)](#)

<sup>17</sup> [MAC Advice on “Level Playing Field” \(30 September 2019\)](#)

<sup>18</sup> [Multi-AC advice on the “Maritime sector – a green post-COVID future” Roadmap \(9 December 2020\)](#)

The fisheries and aquaculture sector is a key pillar of the EU's blue economy<sup>19</sup>, contributing significantly to food sovereignty, employment, economic development, and environmental sustainability, particularly in rural and coastal communities. In 2021, the marine living resources sector (fisheries, aquaculture, processing and distribution of fish products) generated more than €22.0 billion in Gross Value Added. The sector directly employed more than 543 000 persons, mainly in coastal areas.

In Europe, fisheries and aquaculture are deeply embedded in the traditions, cultural heritage, and identity of people living in coastal regions across the continent<sup>20</sup>, as reflected in local festivals and folklore. These activities are also connected, as intangible cultural heritage, to the regional gastronomy of coastal areas<sup>21</sup>.

**8. Generational renewal, including through the increase of attractiveness of the sector, skills development, and investments in modernisation and better working conditions<sup>22</sup>**

The fisheries and aquaculture supply chain faces significant recruitment difficulties, including for unskilled positions. The difficulties are heightened by the geographical location of production units in coastal and rural areas, competition from tourism-related economic activities, lack of technical skills related to factory employment, lack of attractiveness to the younger generation, lack of reputational prestige of the sector among the general society, lack of promotion of the related professions and their social value, lack of long-term policy perspective as well as

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<sup>19</sup> [European Commission, The EU blue economy report 2024](#)

<sup>20</sup> [Martino, S., Azzopardi, E., Fox, C. et al. The importance of local fisheries as a cultural attribute: insight from a discrete choice experiment of seafood consumers. \*Maritime Studies\* 22, 22 \(2023\)](#)

<sup>21</sup> For examples in Macaronesia, see: [José Antonio González, Ana L. Álvarez-Falcón, Ricardo Sousa, Mafalda Freitas, Sandra Correia, José M.N. Azevedo, "Fishing resources of the traditional gastronomy of Macaronesia: A navigation through the intangible food heritage in the Azores, Madeira, Canary Islands and Cabo Verde, \*International Journal of Gastronomy and Food Science\*, Volume 36, 2024.](#)

<sup>22</sup> [MAC Advice on "European Year of Skills" \(30 March 2023\)](#)

administrative burden, challenging working environment on board fishing vessels, dependency on workers from third countries, and insufficient public vocational training.

**9. Importance of public support and of the continuation of a dedicated sectoral fund to support sustainability and to guarantee the viability of the fisheries and aquaculture supply chain as well as the health of our oceans<sup>23</sup>**

Dedicated financial instruments for fisheries, aquaculture and maritime affairs have played a key role in supporting and structuring the sector in the EU. Public funding is vital for the future of primary production, including Producer Organisations, and the entire value chain and consumers. Strengthened funding can support and accelerate the transition to innovation and net-zero targets, while ensuring resilience and continued viability of supply as well as the conservation and sustainable exploitation of our oceans.

**10. The impact of recent crises, such as Brexit<sup>24</sup>, the COVID-19 pandemic<sup>25</sup>, and Russia's war of aggression against Ukraine<sup>26</sup>, on the costs faced by the supply chain and the impact on the consumption of fishery and aquaculture products by EU consumers**

Several recent crises have contributed to higher raw material, energy, and production costs. Unlike several food product categories for which the consumer prices have remained quite stable, citizens are facing higher prices for fishery and aquaculture products: this, combined with a reduced purchasing power, determines a decline in the consumption of fishery and aquaculture

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<sup>23</sup> [Multi-AC letter on the future of the Multiannual Financial Framework \(MFF\) \(15 April 2025\)](#)

<sup>24</sup> [MAC Advice on "Withdrawal of the United Kingdom from the European Union" \(11 June 2021\)](#)

<sup>25</sup> [MAC Advice on "Impact and Mitigation of the COVID-19 Pandemic on the Seafood Supply Chain" \(11 December 2020\)](#)

<sup>26</sup> [MAC Advice on "Disturbances in the market of fisheries and aquaculture products due to the Russian invasion of Ukraine" \(3 February 2023\)](#)

products in the EU<sup>27</sup>. According to the latest Eurobarometer survey, the cost of the product remains a key factor when buying fishery and aquaculture products<sup>28</sup>.

### **11. Engagement with the stakeholders of the entire fisheries and aquaculture value chain as well as with other interest groups, particularly via the Advisory Councils**

Stakeholder engagement and input helps shape policy, consideration for diverse perspectives, better understanding of ongoing challenges, adaptation to regional realities, and a level-playing-field in implementation and solutions. Stakeholder engagement should include the entire fisheries and aquaculture value chain as well as other interest groups. The Advisory Councils have been a positive step for stakeholder engagement and are an important and effective tool to facilitate this engagement, allowing stakeholders to share their knowledge and present their proposals.

### **12. Connection to other horizontal policies affecting the fisheries and aquaculture supply chain, such as the Regulation on Forced Labour<sup>29</sup>, the Corporate Sustainability Due Diligence Directive<sup>30</sup>, trade policy<sup>31</sup>, food safety, and consumer information rules<sup>32</sup>**

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<sup>27</sup> [EUMOFA, The EU Fish Market \(2024\)](#)

<sup>28</sup> [European Commission, Special Eurobarometer 558 on “EU consumer habits regarding fishery and aquaculture products” \(2025\)](#)

<sup>29</sup> [MAC Advice on “Forced Labour in the Fisheries and Aquaculture Market” \(30 November 2023\)](#)

<sup>30</sup> [MAC Letter on “Implementation of the Forced Labour Regulation and of the Corporate Sustainability Due Diligence Directive in the Fisheries and Aquaculture Sector” \(4 November 2024\)](#)

<sup>31</sup> [MAC Advice on “Trade Policy Instruments and Impact on the EU Market for Fishery and Aquaculture Products – Improvement of Data” \(30 March 2022\)](#)

<sup>32</sup> [MAC-AAC Recommendation on “consumer information on fishery and aquaculture products, particularly in the context of the HORECA Sector” \(23 October 2024\)](#)

Several horizontal policies have a significant impact on the fisheries and aquaculture supply chain, illustrating the importance of coordination across the various Commission services, particularly on food policy aspects.

Recent horizontal pieces of legislation, such as the Regulation on Forced Labour and the Corporate Sustainability Due Diligence Directive, are expected to increase requirements and assurances in the supply chain. Various trade instruments, such as free trade agreements, economic partnership agreements, the Generalised Scheme of Preferences, and autonomous tariff quotas, play a role in the supply of the EU market. Besides the specific provisions of the Common Market Organisation in Fishery and Aquaculture Products Regulation<sup>33</sup>, communication to consumers is affected by several pieces of legislation, such as the Food Information to Consumers Regulation<sup>34</sup>, the Unfair Commercial Practices Directive<sup>35</sup>, and the Green Claims Directive<sup>36</sup> (currently under negotiation).

### 13. Recommendations

The MAC believes that, under the upcoming communication on a vision for fisheries, aquaculture and their markets for 2040, the European Commission should commit to:

- a) Undertaking a comprehensive EU-wide communication campaign, in close cooperation with the 27 Member States, to raise awareness among citizens about the nutritional and environmental benefits of the consumption of sustainable fishery and aquaculture products, including through collaboration with institutional actors, schools, retailers, and

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<sup>33</sup> [MAC Advice on “2022 Report on the Functioning of the Common Market Organisation \(CMO\)” \(30 March 2022\)](#)

<sup>34</sup> [MAC Advice on “Public Consultation on Revision of EU Regulation on the Provision of Food Information to Consumers” \(30 March 2022\)](#)

<sup>35</sup> [MAC Advice on “Empowering the Consumer for the Green Transition” \(6 October 2022\)](#)

<sup>36</sup> [MAC Advice on “Substantiation and Communication of Explicit Environmental Claims \(Green Claims Directive\)” \(30 November 2023\)](#)

chefs, while also leveraging digital platforms, social media influencers, and food industry leaders<sup>37</sup>;

- b) Encouraging the application by Member States of a low and harmonised VAT tax rate across the EU for healthy and sustainably sourced fishery and aquaculture products;
- c) Continuing to implement a dedicated financial instrument for fisheries, aquaculture and maritime affairs to support food security, sustainable exploitation of fishery resources, sustainable growth of aquaculture, development of coastal and rural communities, and the health of our oceans;
- d) Optimising and simplifying the use of EU funds to make them more compatible with the fisheries and aquaculture sectors, when relevant;
- e) Ensuring the harmonisation, at EU-level, of sustainability claims to help consumers gain clarity on the environmental impacts of fishery and aquaculture products;
- f) Via the dedicated sectoral fund and horizontal funds, supporting innovation, modernisation and economic growth in the sector and in coastal communities, including through the promotion of new product lines, implementation of digital traceability and consumer information initiatives, support for small businesses and startups, and business and technical coaching for innovative startups and scaleups;
- g) Developing a legislative framework that secures administrative simplification and ensures a level playing field both among Member States and between the EU and third countries, and establishing a dedicated expert group tasked with reducing the administrative burden on fisheries and aquaculture value chain business by 25% overall and by 35% specifically for small and medium-sized enterprises (SMEs);

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<sup>37</sup> The campaign could build on the [“Taste the Ocean” campaign](#) but implemented in a wider scale. Other messaging aspects, such as convenience, diversity of products, diversity of price points, the framework of the Common Fisheries Policy, positive human elements, and diversity across production and the supply chain, could be integrated, as suggested in the [MAC Advice on ““Taste the Ocean” campaign and other potential campaigns for awareness about fishery and aquaculture products in the EU” \(31 January 2024\)](#). The campaign could also account for the work of recent communication-related projects, such as [VeriFish](#) and [Mr Goodfish 3.0](#).

- h) To ensure sustainable and sufficient EU supply, undertaking a study to identify the reasons for the current decline of the EU fleet and fisheries and aquaculture production as well as the underutilisation of some EU fishing quotas and, when appropriate, following up with measures to address these, and promote the sustainable growth of aquaculture production in the EU;
- i) When negotiating international trade instruments, account for the specificities and sensitivities of the fisheries and aquaculture market, including through the application of equivalent sustainability standards, and the promotion of the ratification of key international fisheries-related conventions, while also guaranteeing access to the necessary blue raw materials and the competitiveness of EU operators, and safeguarding the livelihoods of coastal communities and food security within non-EU countries;
- j) Taking action for an effective implementation of EU import control rules across Member States, including implementation of advanced automated digital controls to decrease impacts on onboard activities and on the land-based supply chain and to maintain the quality of the products, while maintaining a zero-tolerance approach to the presence of products from illegal, unreported, and unregulated fishing in the market<sup>38</sup>;
- k) Setting up a roadmap and follow-up measures on the recruitment and generational renewal challenges faced by the value chain, which should account for geographical distribution, competition from other economic sectors, skills and training, lack of attractiveness, work conditions and safety, and dependency on foreign workers;
- l) In the context of market intelligence and trade statistics, creating when necessary new CN codes to monitor the trade of species falling into generic categories, assessing how to provide reliable information on the classification of the production method of imported products (aquaculture vs wild-caught), and establishing a method to provide data for each

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<sup>38</sup> [MAC-LDAC Advice on “Urgent need for effective implementation of EU import control rules across Member States” \(27 June 2025\)](#)

instrument<sup>39</sup> on how they are applied and utilised for each species of importance to the EU market;

- m) Maintaining strong stakeholder engagement with the entire fisheries and aquaculture value chain and other interest groups, particularly via the Advisory Councils;
- n) Close coordination across Commission services on policies with an impact on the fisheries and aquaculture production and supply chain, particularly avoiding the development of food policy from an exclusively agricultural perspective. As a concrete example, should a European protein strategy be envisaged, marine proteins must be fully integrated into its scope, reflecting their critical role in food security and healthy diets;
- o) Recognising that pollution from land-based activities has a direct and detrimental impact on marine water quality, which in turn undermines the viability and productivity of fisheries and aquaculture. The Commission should ensure that terrestrial and aquatic food production systems do not adversely affect each other. This calls for effective cross-coordination between relevant Commission services to design and implement corrective measures at the source of pollution, in line with a systemic and integrated approach to sustainable food production;
- p) Emphasising the importance of a well-functioning Single Market and a regulatory framework that provides legal certainty, predictability and practicality for the EU's competitiveness, including through a well-functioning supply chain in support of a stable market of fishery and aquaculture products, fair competition, proper enforcement and sustainable ocean resources, and avoiding creating barriers to the Single Market;
- q) Highlighting the focus on consumer information, including support for the use of commercial designations on labelling, food safety and sustainability, while also

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<sup>39</sup> E.g., individual free trade agreements, economic partnership agreements, the Generalised Scheme of Preferences, and autonomous tariff quotas.



emphasising the commitment to the responsible sourcing of fishery and aquaculture products, including through the use of transparent, voluntary certification schemes.