


DISCUSSION PAPER

Informal Meeting of EU Ministers of Fisheries

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Bruges





An attractive, profitable and forward-looking policy is key for our European fisheries and aquaculture sectors. Both sectors play an important socio-economic role, particularly for coastal and rural communities, which needs to be taken into account, along with the diversity of the EU fisheries fleet and aquaculture sector. Enabling their contribution to climate neutrality, moving towards more sustainable production systems, fishing gears and techniques, and protecting the most vulnerable natural areas are certainly important environmental goals. Research, innovation and data collection are therefore vital pathways to developing a balanced set of future-proof policy goals, and will contribute to improving the sector's competitiveness.

In addition, the fisheries and aquaculture sectors undeniably have a crucial role to play in ensuring food security, employment and the sustainable management of marine resources and ecosystems. Hence, we need to ensure that the EU's fleet and aquaculture infrastructures continue to be able to safeguard sustainable food production in the future. We also need to increase the resilience of these sectors and ensure that the policies and measures put in place are effective in accompanying them through these changing waters.



Preparing for the future of EU fisheries and aquaculture

Protecting the EU fisheries and aquaculture sectors against external pressures and managing internal constraints

The geopolitical context has changed substantially since the last reform of the Common Fisheries Policy in 2013. The withdrawal of the United Kingdom from the European Union has led to a situation where most of the EU's fishing opportunities are now shared with third countries, impacting the setting of Total Allowable Catches (TACs) and fisheries management in general. The EU fisheries sector has also come under strong pressure as a result of unilateral actions by third countries that impact EU fishing opportunities, in addition to a succession of crises (the COVID-19 pandemic, the energy crisis and the consequences of Russia's aggression against Ukraine) that have hit this sector.

Some of these external pressures are also felt by the EU aquaculture industry, which, despite all efforts and support, has not increased in production volume in the past decade to the level the EU would have hoped. The overall EU production seems to be rather stable and slightly above 1.2 million tonnes between 2008 and 2020 (STECF Economic report on aquaculture 2022).

In addition, the effects of climate change are impacting both the fisheries and aquaculture sectors. The transition towards energy efficient fishing and aquaculture practices with a low impact on the marine- and freshwater environment and the decarbonisation of both sectors remain challenging objectives.

With an increasing number of actors (e.g. energy sector) now present in the marine space, important fishing areas should be protected and the multi-use of marine space are to be carefully assessed. The engagement of stakeholders – including fishers and aquaculture farmers – is central to the Maritime Spatial Planning process. A multi-use approach to the management of sea space is needed, especially in areas that are already very crowded, and this has to start from the planning phase.

Furthermore, we are also seeing some internal constraints. For example, fishers face a daily challenge when implementing the landing obligation in highly mixed fisheries and further solutions should be found to manage this issue.

The implementation of new legislation can also be challenging with increasingly strict EU environmental legislation resulting in a trade-off between technological possibilities on the one hand and the need to increase the sustainability of marine activities on the other. Another example are the recently modernised control obligations which create unrest in the EU fisheries sector.

Moreover, there is a high administrative burden in both the fisheries and the aquaculture sectors. The question remains as to whether this burden is in proportion with the expected outcome. Further digitalization of fisheries reporting could already be one step in alleviating some of the burden.

It is important to identify the factors that may hamper the transition towards sustainable practices in order to guarantee a thriving future for our fisheries and aquaculture sectors that takes into account not only the environmental pillar of sustainability but also the social and economic pillars. This will enable us to evaluate whether certain adjustments to the legislation and/or new initiatives are needed.

Strengthening the attractiveness of the EU fisheries and aquaculture sectors in all their diversity

The EU fisheries sector is very diverse with a variety of sea basins, subregions, fishing techniques and methods, fleet sizes, vessels and local traditions. This diversity of the EU fisheries sector is also reflected in the variety of species caught, and especially highly mixed fisheries offer a wide range of fishery products that cater for European consumers' equally wide range of preferences. The same is true for the EU aquaculture industry which supplies a wide range of different food products (fish, shellfish, and algae) originating from land-based, freshwater and marine production systems. Even though it gives rise to a multitude of challenges, this diversity is primarily a strength, since it ensures a constant contribution to food production, can better cope with natural fluctuations and unforeseen circumstances and provides us with a broad array of knowledge.

Currently, the EU is the main and most profitable market for fish products for countries and territories in for example the North East Atlantic. The EU has an interest in altering actions which progressively undercut our traditional access to main fishing grounds and quota rights on which the EU's food security depends. Therefore it is important to reflect on the strategic link between market access and preferences in fisheries products, and fisheries management (including access and quotas).

It is in our interest to strengthen food security and support our internal market. The EU is currently more than 70% dependent on imports of fisheries and aquaculture products from third countries. Aquatic products remain attractive, healthy and protein-rich food for the European consumer, so we should strive to maintain the diversity and affordability of product supply and increase the share of the supply produced by the EU.

When we reflect on the future of EU fisheries and aquaculture it is therefore also important to consider how we can strengthen the attractiveness of these very diverse sectors. It is important to guarantee generational renewal by providing a socio-economic perspective of a profitable sector, warranting legal certainty, respecting and securing proper safety and working conditions, optimizing further training opportunities and stimulating innovation and research.

Preparing for a fisheries and aquaculture policy that can navigate through changing waters

The Presidency conclusions of last June welcomed the launch of an EU-wide participatory foresight project "Fishers of the Future" by the Commission. This project aims to forecast the crucial role of fishers in our society that goes beyond the provision of high-quality seafood with a low carbon footprint.

The Presidency conclusions also emphasized the need to better identify the trends, opportunities and challenges that determine the attractiveness of the fisheries and aquaculture sectors. This is especially important if the EU wants to develop a long-term vision and preserve these strategic sectors for future generations. At a time when numerous challenges are exacerbating one another, we need to keep a clear focus on the horizon: resilient, attractive,

sustainable and innovative fisheries and aquaculture sectors. Collective EU actions in the short term are therefore needed to achieve this long-term objective.

In this respect, data collection and scientific analysis remain a key lever to providing a solid base for taking future policy decisions. Data collection in close cooperation with our fishers is essential. As guardians of the sea, they know and understand the marine environment. With more "real time" data available it should be possible to considerably improve the basis for up-to-date scientific advices to establish catch quota and management measures. With the help of digitalisation, smart innovations and increased research, our fishers can also increase selectivity, reduce unwanted by-catches and keep fishing. This "precision fishing" with for example bottom trawling techniques can be carried out while safeguarding the marine environment. Data collection is also essential for aquaculture in order to optimize production. These data, in both areas, allow scientists to carry out more accurate research and provide more accurate advice. It is imperative for the future of our European fisheries and aquaculture that this advice also takes into account socio-economic indicators.

Questions for discussion

In light of the above, the Belgian Presidency invites participants to share their views on the following questions:

- 1. Which legal, financial or other aspects need to be addressed in order for the fisheries and aquaculture sectors to cope with the external pressures and internal challenges which they are currently facing? In your opinion, what EU-level actions are needed in the next institutional cycle (2024-2029)?*
- 2. In the context of innovation and digitalisation data is the new gold. How can we increase data collection and processing and the use of big data in order to strengthen further the three pillars of sustainability in fisheries and aquaculture?*