100833/EU XXVIII. GP
Eingelangt am 30/10/26

Council of the European Union

**Brussels, 30 October 2026**
**(OR. en)**

**14758/26**
**ADD 3**

**PECHE 433**

**COVER NOTE**

| | |
|---|---|
| From: | Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director |
| To: | Ms Thérèse BLANCHET, Secretary-General of the Council of the European Union |
| No. Cion doc.: | SWD(2026) 751 final |
| Subject: | COMMISSION STAFF WORKING DOCUMENT EU Fisheries External Action: Achievements and Challenges Accompanying the document COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT,THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS Vision 2040 for fisheries and aquaculture |

Delegations will find attached document SWD(2026) 751 final.

Encl.: SWD(2026) 751 final



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EUROPEAN
COMMISSION

Strasbourg, 20.10.2026
SWD(2026) 751 final

**COMMISSION STAFF WORKING DOCUMENT**

**EU Fisheries External Action: Achievements and Challenges**

***Accompanying the document***

**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT,THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**Vision 2040 for fisheries and aquaculture**

{COM(2026) 701 final} - {SWD(2026) 750 final} - {SWD(2026) 752 final} - {SWD(2026) 753 final}



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## Glossary

| Term or acronym | Meaning or definition |
|---|---|
| AER | Annual economic report |
| ACP | African, Caribbean and Pacific states |
| AIS | Automatic information system |
| ATQ | Autonomous tariff quota |
| BBNJ | Biodiversity beyond national jurisdiction |
| CAOFA | Agreement to Prevent Unregulated High Seas Fisheries in the Central Arctic Ocean, also known as the Central Arctic Ocean fisheries Agreement |
| CBD | UN Convention on Biological Diversity |
| CCAMLR | Commission for the Conservation of Antarctic Marine Living Resources |
| CCSBT | Commission for the Conservation of Southern Bluefin Tuna |
| CFP | Common Fisheries Policy |
| CITES | Convention on International Trade in Endangered Species of Wild Fauna and Flora |
| CMA | Common Maritime Agenda for the Black Sea |
| CMO | Common organisation of the market of fishery and aquaculture products |
| CMS | Convention on the Conservation of Migratory Species of Wild Animals |
| DCF | EU data collection framework |
| DWF | Distant-water fleet |
| EEZ | Exclusive economic zone |
| EFCA | European Fisheries Control Agency |
| EP | European Parliament |
| EU | European Union |
| EUMOFA | European Market Observatory for Fisheries and Aquaculture Products |
| FPA | Fisheries partnership agreement |
| FAO | Food and Agriculture Organisation |
| FAP | Fishery and aquaculture product |
| FTA | Free trade agreement |
| FTE | Full-time equivalent |
| GBF | Global Biodiversity Framework |
| GFCM | General Fisheries Commission for the Mediterranean |
| GSP | General system of preferences |
| GVA | Gross value added |

| Term or acronym | Meaning or definition |
|---|---|
| IATTC | Inter-American Tropical Tuna Commission |
| ICES | International Council for the Exploration of the Sea |
| IOTC | Indian Ocean Tuna Commission |
| ICCAT | International Commission for the Conservation of Atlantic Tunas |
| ILO | International Labour Organization |
| IMO | International Maritime Organisation |
| IOG | International ocean governance |
| IUU | Illegal, unreported and unregulated fishing |
| LSF | Large-scale fleet |
| LWE | Live weight equivalent |
| MCS | Monitoring, control and surveillance |
| MEA | Multilateral environmental agreement |
| MFN | Most favoured nation |
| MPA | Marine protected area |
| MoU | Memorandum of understanding |
| MSE | Management strategy evaluation |
| NAFO | Northwest Atlantic Fisheries Organisation |
| NEAFC | North East Atlantic Fisheries Commission |
| NPFC | North Pacific Fisheries Commission |
| OACPS | Organisation of ACP States |
| PSMA | Port State Measures Agreement |
| RFB | Regional fisheries body |
| RFMO | Regional fisheries management organisation |
| RSC | Regional sea convention |
| SDG | Sustainable Development Goal |
| SEAFO | South East Atlantic Fisheries Organisation |
| SFPA | Sustainable fisheries partnership agreement |
| SIOFA | Southern Indian Ocean Fisheries Agreement |
| SMEFF Regulation | Regulation on the sustainable management of the EU's external fishing fleets |
| SPRFMO | South Pacific Regional Fisheries Management Organisation |
| SSCF | Small-scale coastal fleet |

| Term or acronym | Meaning or definition |
|---|---|
| STECF | Scientific, Technical and Economic Committee for Fisheries |
| TAC | Total allowable catches |
| TCA | EU-UK Trade and Cooperation Agreement |
| UBO | Ultimate beneficial ownership |
| UK | United Kingdom |
| UNCLOS | United Nations Convention on the Law of the Sea |
| UNFSA | United Nations Fish Stocks Agreement |
| VME | Vulnerable marine ecosystem |
| VMS | Vessel monitoring system |
| WCPFC | Western and Central Pacific Fisheries Commission |
| WTO | World Trade Organisation |

# 1 INTRODUCTION

In 2009, the European Commission issued the Green Paper on the reform of the Common Fisheries Policy (CFP)[1], highlighting the need to strengthen the external dimension of the CFP. In 2011, the Commission issued the Communication on the External Dimension of the Common Fisheries Policy[2], alongside the proposals on the reform of the CFP. The primary aim was to update the policy framework for the external action of the CFP and, for the first time, to integrate its key principles into the CFP Regulation[3]. The 2011 Communication resulted in a chapter of the CFP Regulation dedicated to external action that outlines the principle of parallelism between internal and external action.

**The headlines of the 2011 Commission Communication**

*Contributing to long-term sustainability worldwide*

- transforming our dialogues into working partnerships;
- putting an end to illegal fishing;
- overcapacity – a global issue;
- upholding and strengthening the global architecture for fisheries governance;
- contributing towards a more effective functioning of RFMOs.

*Towards sustainable fisheries agreements*

- better promotion of long-term resource conservation and sustainability;
- reinforcing the governance of bilateral fisheries agreements;
- more effective support for sustainable fisheries in partner countries.

*Coherence with other EU policies*

- coordination of fisheries and development policies;
- in the context of the European Union's external action, support fisheries-related strategies and programmes;
- the EU's trade policy can contribute to ensure sustainable fishing worldwide;
- coherence of environmental and fisheries objectives.

The time has now come to take stock of what has been achieved, the impact of emerging challenges, how the international landscape and the EU priorities and strategies have evolved and what remains to be done. This comes against the backdrop of efforts to implement the United Nations 2030 Agenda and its fisheries-related targets[4] as well as the recognition that progress has been uneven globally and that the broader policy and geopolitical context has evolved considerably since the Sustainable Development Goals (SDGs) were agreed. This assessment builds and expands on the 2023 Commission Communication on the Implementation of the CFP[5] and the findings of the evaluation of the CFP Regulation[6]. The evaluation encompasses the 11 years from 2014 to 2025 that started with the entry into force of the 2013 CFP Regulation (1 January 2014). It includes the external dimension of the CFP.

This staff working document recalls the objectives and scope of the EU's fisheries external action; presents the characteristics of the EU fleets operating in non-EU waters; and reports on the achievements and remaining challenges. It thus provides the supporting analysis for the EU

1 COM(2009) 163 final
2 COM(2011) 424 final.
3 Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy.
4 KnowSDGs.
5 The common fisheries policy today and tomorrow: a Fisheries and Oceans Pact towards (COM(2023) 103 final).
6 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final).



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strategy for fisheries external action set out in the Commission Communication on Vision 2040 for fisheries and aquaculture[7].

## 1.1 Objectives and scope of the EU's fisheries external action

The core of the CFP was established in 1983. It comprised the conservation and management of fish stocks, through the setting of input and output controls such as catch (total allowable catches (TACs) and quotas) and effort limits, as well as the introduction of technical measures for specific gears and species. This initial development took place against a backdrop of rapidly diminishing free access to fisheries resources following the entry into force of the UN Convention on the Law of the Sea (UNCLOS)[8]. Many countries declared their exclusive economic zones (EEZs), bringing around 90% of the world's fisheries resources under the control of coastal states. This meant that EU Member States' fleets no longer had free access to certain waters in which they had previously fished. Similarly, third-country vessels could no longer fish freely in EU waters.

The then European Community negotiated fisheries agreements to allow Member States' fleets to continue fishing in third-country waters where they had traditionally fished. This was the *de facto* beginning of an 'external' fisheries policy, with agreements with third countries in the Northeast Atlantic (notably the Faroe Islands, Iceland and Norway) that provided for mutual access to waters and the exchange of fishing quotas. When new Member States later joined the Community, some of their bilateral agreements were replaced by EU fisheries agreements. This was particularly the case with the accession of Spain and Portugal, which had their own network of fisheries agreements. In addition, fishery activities in many marine areas beyond national jurisdiction or involving highly migratory species came under the regulation of regional fisheries management organisations and bodies (RFMOs and RFBs). The EU promoted their establishment and became a member of these organisations.

It was only with the 2013 reform that the principles of the EU's external fisheries policy were enshrined in the **CFP Regulation**. The impact assessment accompanying the Commission proposal[9] identified overfishing (defined as fishing at levels that exceed the maximum sustainable yield fishing rate – $F_{MSY}$) as the central problem in EU and international fisheries. At the international level, fisheries partnership agreements (FPAs) did not seem to be sufficiently linked with sustainable fishing in third countries, whereas in RFMOs overcapacity and overexploitation were considered key challenges. The assessment stressed that all other problems were closely tied to this lack of environmental sustainability. Moreover, RFMOs were considered as underperforming on governance due to a lack of robust governance, a lack of reliable and timely data and insufficient monitoring and enforcement of rules, while FPAs lacked relevant rules on funding and key governance principles.

The 2013 CFP reform established that EU's fishing activities outside EU waters are based on the same principles and objectives as within the EU with a view to contribute to sustainable fishing activities. This includes active support to international efforts to eradicate Illegal, Unreported and Unregulated (IUU) fishing and advancing scientific knowledge in RFMOs and Sustainable Fisheries Partnership Agreements (SFPAs). Internationally, while seeking access to non-EU waters for the EU fleet, the Regulation also aims at strengthening governance, scientific base, performance and compliance in RFMOs and in arrangements on fish stocks shared with non-EU countries, as well as increasing the capacity of third countries to manage and monitor their fisheries resources sustainably, in particular in the context of SFPAs. The

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7 Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Vision 2040 for fisheries and aquaculture (COM(2026) 701).

8 See Annex I for details.

9 SEC(2011) 891 final.



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EU's external fisheries policy should also enhance the economic viability of EU fleets and promote employment within the EU.

The background was that almost 85% of the world's fish stocks for which information was available was reported as being either fully exploited or overexploited. The EU is one of the very few players with a fisheries presence in all parts of the ocean. It was also an important market for fishery and aquaculture products (at the time of the CFP reform, it accounted for 7% of global consumption of aquatic food and 16% of global imports in volume). All this meant that the EU had an interest to further engage in conservation and sustainable management of fish stocks globally.

The CFP Regulation (Part VI) sets out general objectives (Article 28) and specific provisions on international fisheries organisations (Articles 29 and 30), SFPAs (Articles 31 and 32) and stocks of common interest (or 'shared stocks' with adjacent countries – Article 33). Concretely, this is implemented as follows.

- **Multilateral cooperation primarily in the framework of RFMOs**[10]**.** RFMOs take binding fisheries conservation and management measures which apply to their area of competence. The Commission represents the EU in these forums. Once agreed, RFMO measures must be enacted into EU law (insofar as they are not already covered by EU legislation), so that they apply to all fishing vessels flying the flag of an EU Member State. The European Parliament and Council adopt the necessary transposition legislation.
- **SFPAs.** The EU concludes SFPAs with third countries so that its fleets can have access to an appropriate share of the surplus in these countries' EEZs. The EU provides a financial contribution to that end. The agreements and/or their implementing protocol are renewed regularly. The Commission negotiates them on behalf of the EU and, once the negotiations are concluded, tables a proposal. The Council then decides on concluding the SFPA (and/or its protocol), with the European Parliament's consent.
- **Reciprocal agreements with third countries in the Northeast Atlantic on stocks of common interest.** The EU must engage with third countries on stocks of common interest to ensure that those stocks are managed sustainably. Each year, the Commission engages in these negotiations on behalf of the EU. Once concluded, the agreements are published as 'agreed records'. They do not require the formal conclusion or consent of the European Parliament and the Council but are reflected in the Council regulations setting annual EU fishing opportunities.

### 1.2 The EU fisheries external action toolkit

The external action of the EU in relation to fisheries goes beyond the external management of fisheries as set out in the CFP Regulation. Several other important pieces of legislation regulate the **EU fleet and its activities beyond EU waters**:

- revised EU fisheries control rules and their external application;
- the Regulation on the sustainable management of the EU's external fishing fleets (SMEFF Regulation);
- the Regulation on the protection of vulnerable marine ecosystems in the high seas (sea areas that lie beyond areas of national jurisdiction).

10 See Annex I for details.



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The EU is a major market for aquatic trade, so its **trade and market measures** play an important role in setting high standards on domestic and imported products. This is the case for:

- sanitary and phytosanitary standards;
- rules on the common market in fishery and aquaculture ;
- traceability obligations under the revised control rules
- the Regulation to fight IUU fishing;
- the Regulation prohibiting products made with forced labour on the Union market;
- autonomous tariff quotas to ensure that the EU's fish processing industry can source raw materials from non-EU countries at reduced rates of duty or duty-free;
- fisheries-specific provisions on imports under EU free trade agreements;
- the Regulation on measures regarding countries allowing non-sustainable fishing.

### 1.3 Fisheries external action and the EU's international ocean governance agenda

The **2009 Green Paper** and the 2011 Commission proposal on the CFP Regulation highlighted the importance of the EU continuing to actively participate in international forums such as the UN General Assembly and the Food and Agriculture Organization (FAO).

In 2016, the EU was the first leading economy to launch an **International Ocean Governance Agenda (IOG) Agenda**[11] and commit to a safe, secure, clean, healthy and sustainably managed ocean – based on international rules and obligations, the CFP principles and objectives, and EU policy coherence. The Agenda was updated in 2022[12]. Reconfirming the EU's commitment to strengthen implementation of the UN 2030 Agenda and its SDG 14 on Life Below Water, it aims to strengthen the ocean governance framework at global, regional and bilateral levels – including by promoting sustainable fisheries beyond the EU's jurisdiction in international forums and bodies and through bilateral relations, as well as by combating and eradicating IUU fishing worldwide. The key priorities included halting and reversing the loss of marine biodiversity and degradation of marine ecosystems; ensuring sustainable fisheries and aquaculture through specific actions; ensuring compliance with international standards and rules (particularly zero tolerance for IUU fishing); ending subsidies contributing to overfishing; and reducing marine pollution.

The **European Ocean Pact** adopted in June 2025[13] reaffirmed these commitments and called for a strengthened EU ocean diplomacy. In particular, the Commission will step up its fight against IUU fishing through the mandatory implementation of electronic catch certification (CATCH) and design a renewed strategic approach to EU fisheries external action. It is also committed to advancing the effective implementation of the Biodiversity Beyond National Jurisdiction (BBNJ) agreement; progress towards an ambitious Plastics Treaty; and pursuing efforts to advance the designation of three vast marine protected areas in the Southern Ocean.

11 JOIN(2016) 49 final.
12 JOIN(2022) 28 final.
13 COM(2025) 281 final.

## 2 EU EXTERNAL CATCHES, FLEET AND TRADE

This section focuses on the economic aspects of the external dimension of EU fisheries: where and what the EU's fleets catch; the vessels concerned and their economic situation; and the EU's economic relation with the rest of the world as regards trade in fisheries and aquaculture products.

It is important to note that the analysis faces some methodological challenges linked to the definition of 'external fleet', due to different fleet categorisations across different reporting frameworks. The annual economic report (AER) of the Scientific, Technical and Economic Committee for Fisheries (STECF) uses data collected under the EU data collection framework (DCF)[14] fleet segmentation. This defines the distant-water fleet (DWF) as the fishing vessels above 24 metres that fly the flag of an EU Member State and fish predominantly in non-EU waters. It defines the large-scale fleet (LSF) as vessels over 12 metres that use static gears as well as all vessels that use towed gears and operate predominantly in EU waters. The SMEFF regulation applies to vessels above 24 metres for authorisations for fishing in international waters. However, Brexit has changed the composition of the EU's external fleet, which now contains many vessels of all sizes that operate in UK waters. This has increased the number of vessels operating in non-EU waters, but which are not regarded as DWF for the purposes of economic statistics. This makes it impossible to isolate this part of the external fleet from the LSF operating in EU waters in terms of the socio-economic data.

Sections 2.1 and 2.2 therefore follow a catch-all approach and include all vessels operating in non-EU waters – irrespective of their length – in order to provide a complete picture of the EU's external fleet in terms of catches and vessel authorisations (including smaller vessels which would be underrepresented if the analysis were conducted according to the standard STECF categorisation). Section 2.3 on socio-economic analysis is limited to the DWF in its strictest sense (according to the standard STECF categorisation) and provides only a snapshot of the EU fleet operating in non-EU waters.

### 2.1 EU external catches

Overall, between 2014 and 2024, the share of catches from non-EU waters in the total volume of EU catches rose from 29.5% (1.3 million tonnes, EUR 2.1 billion) to 46% (1.5 million tonnes, EUR 2.9 billion)[15].

*Geographic distribution*

The FAO divides the global ocean into 19 major fishing areas that are known as FAO areas. EU fisheries operate in most of these areas, but EU's catches are taken principally in nine key areas (Figure 1). **Most EU catches are taken in FAO Area 27 (North-east Atlantic)**, which includes the EU EEZ in the Atlantic, North Sea and Baltic Sea. This area accounted for an annual average of 71% of the EU fleet's total catches in 2014-2024 (29% of this came from non-EU waters). FAO Areas 37 (the Mediterranean and Black Sea, which also includes a large part of EU waters), 34 and 51 were the next most significant contributors (9%, 7% and 6% respectively). Other areas contributed less than 6%.

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14 Commission Delegated Decision (EU) 2021/1167 of 27 April 2021 establishing the multiannual Union programme for the collection and management of biological, environmental, technical and socioeconomic data in the fisheries and aquaculture sectors from 2022.

15 Sources: EC Effort and Catch Reporting (ECR) and Fisheries Dependent Information (FDI).

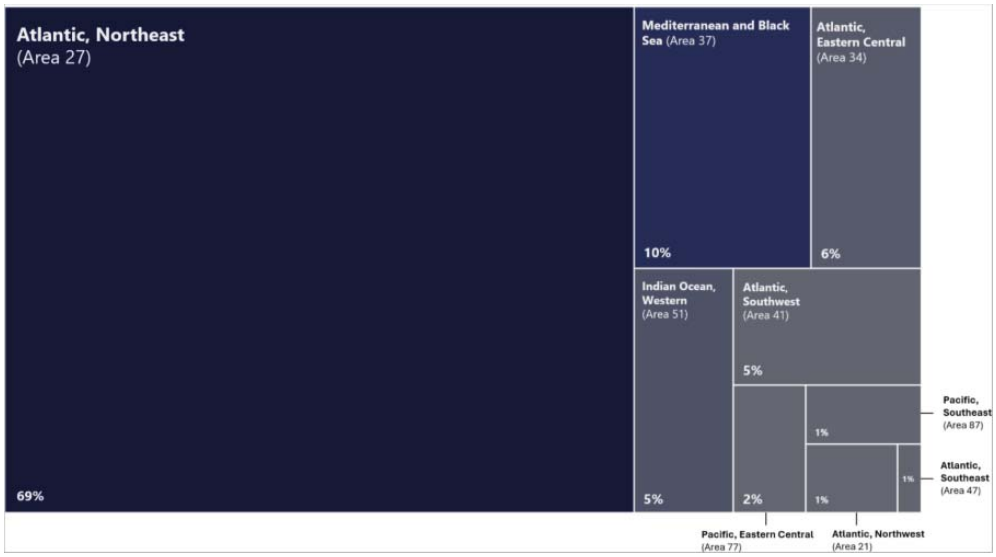



Figure 1 – Percentage of EU fisheries catches by major fishing area in terms of weight (2024). Source: EC Effort and Catch Reporting (ECR). Note that only areas with values greater than 1% are displayed.

In 2014-2024, **the distribution of EU fishing volume across major FAO areas remained structurally stable** (Figure 2). The Northeast Atlantic (FAO Area 27) was consistently the predominant fishing ground, accounting for between 68% and 74% of total annual EU fishing catches in volume throughout the period. Apart from this overall stability, several minor trends emerged. The Eastern Central Atlantic (FAO Area 34) recorded a marked and sustained decline in its relative share, falling from 12% in 2014 to 5% by 2024. Conversely, the Mediterranean and Black Sea (FAO Area 37) demonstrated a gradual upward trend, rising from 6% in 2014 to a peak of 10% in both 2020 and 2024, before falling back to 6% in 2025. The Western Indian Ocean (FAO Area 51) maintained a comparatively stable contribution, fluctuating between 4% and 7%. A moderate increase was observed in the South-west Atlantic (FAO Area 41), where the share progressively grew from 3% to 5%. Regarding Pacific fishing grounds, both the Eastern Central Pacific (FAO Area 77) and the South-east Pacific (FAO Area 87) represented marginal but non-negligible components of overall EU catches activity, each recording a share of approximately 1% for most of the reference period. It is nonetheless noteworthy that the relative contribution of these areas fell below that threshold in certain years.

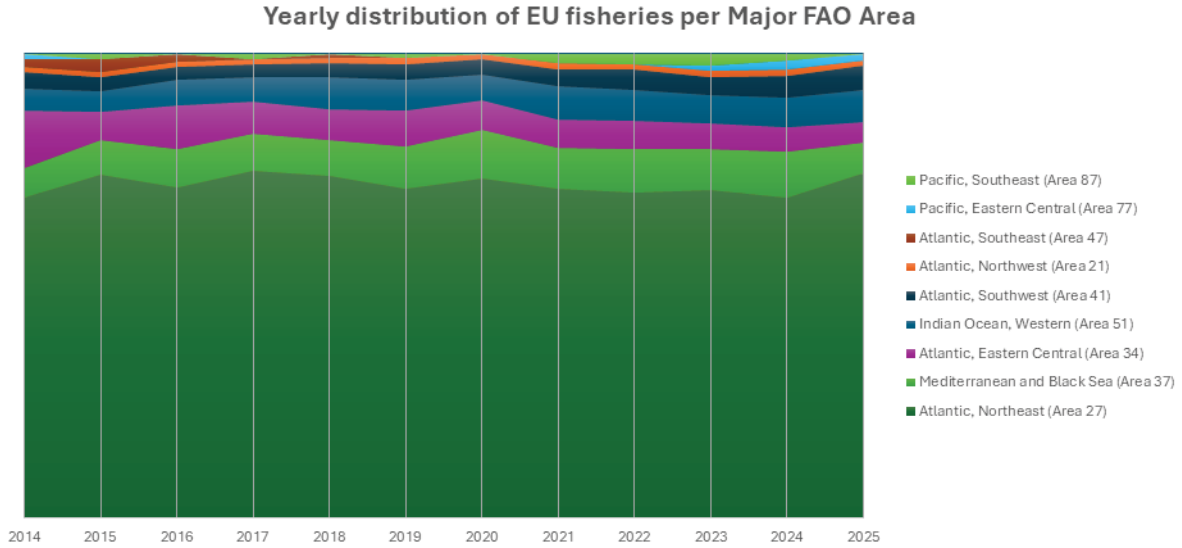



Figure 2 - Yearly catches distribution per major fishing area for EU fisheries. Source: EC Effort and Catch Reporting (ECR). Note that only areas with values greater than 1% are displayed.

*Distribution by management type*

Regarding the respective share of the various types of external fisheries management[16], a marked increase in the **number and share of stocks from adjacent non-EU countries** was observed from 2020 onwards. The vast majority of stocks in the **Northeast Atlantic** are now, post-Brexit, being managed together with third countries. It is estimated that the United Kingdom (UK) EEZ alone provides the equivalent of 29% of the EU's catches in the North-east Atlantic[17]. Following Brexit, more than 120 TACs have been negotiated with third countries in the region (an increase from 23% to 77%[18]). 102 TACs and a range of non-quota stocks are now jointly managed with the UK. 29% of catches from regulated stocks in this area come from non-EU waters (27% from third-country waters covered by bilateral, trilateral or multilateral agreements and 2% from international waters). In terms of economic value, however, this proportion is lower. In 2024, Northeast Atlantic catches represented 69% of the volume of all catches by the EU fleet globally and nearly 56% in terms of value (respectively 2.3 million tonnes and EUR 3.4 billion)[19].

As regards distant waters (Figure 3), the Western Indian Ocean (FAO Area 51) accounts for the largest share at 26%, followed by the South-west Atlantic (FAO Area 41) and the Atlantic Eastern Central (FAO Area 34), which each contribute 21% (Figure 3). These three areas together represent more than two thirds of EU distant-water catches.

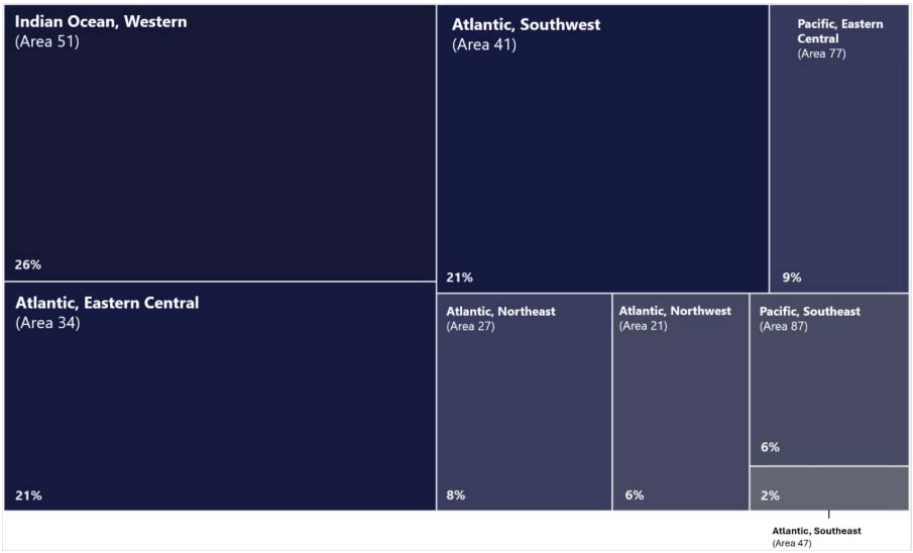



Figure 3– Percentage of EU fisheries catches (weight) in non-EU-Norway-UK waters per FAO area (2024). Source: EC Effort and Catch Reporting (ECR). Note that only areas with values greater than 1% are displayed.

*The EU compared with third countries*

When **comparing the EU with third countries**, the EU's relative presence varies considerably across regions (Figure 4). The Northeast Atlantic (Area 27) stands out as the only area where the EU holds the largest share, at 27.8% – narrowly ahead of Norway (26.1%). The EU's share

16 EU external catches are presented by FAO fishing areas due to important methodological limitations that constrain analysis by stock or management framework. This is due to a partial geographical overlap between SFPAs and RFMOs, as well as difficulties in linking fishing authorisations to actual fishing activity and reported catches. Vessels' position data may in some cases support such analysis, but data gaps and inconsistencies may affect the reliability and comparability of the results, particularly over time.

17 Landings by the EU Member States from the UK EEZ and by the United Kingdom from the EU-27 and the UK EEZs: 2015-2018, Joint Research Centre, European Commission, 2021.

18 Facts and figures on the common fisheries policy – Publications Office of the EU, June 2025.

19 Estimate based on EC Effort and Catch Reporting (ECR) and Fisheries Dependent Information (FDI).

is modest across all other distant-water areas, ranging from 1.2% in the South-east Pacific to 6.6% in the South-west Atlantic.

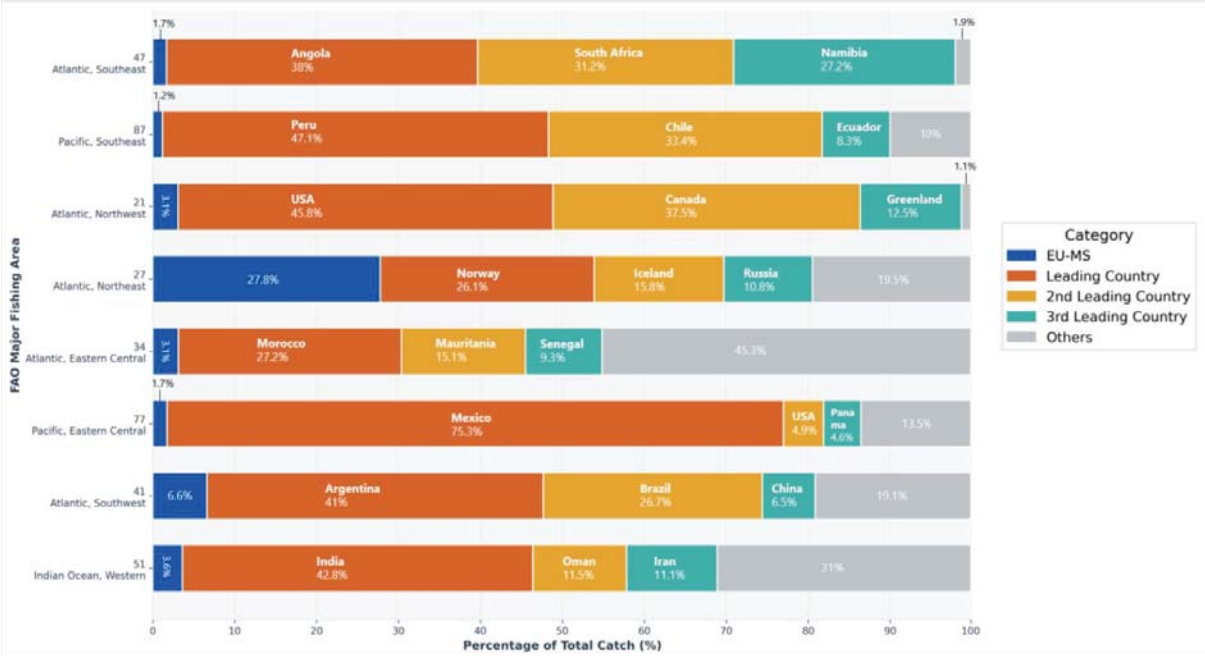



Figure 4 – EU catches share per FAO major fishing area and the top three leading countries per area for 2023. Source: FAO global production data. Note that only areas with values greater than 1% are displayed.

*Landings*

The **landing pattern of EU distant-water catches** (Figure 5) shows that in 2024, half of these catches (50%) were landed in EU ports, 6% in Norwegian and UK ports, and 44% in other ports around the world. It is noteworthy that the share landed in EU ports has increased substantially over the preceding decade, rising from just 20% in 2014 to around 50% in recent years – while landings in third-country ports declined correspondingly from 77% to 44%.

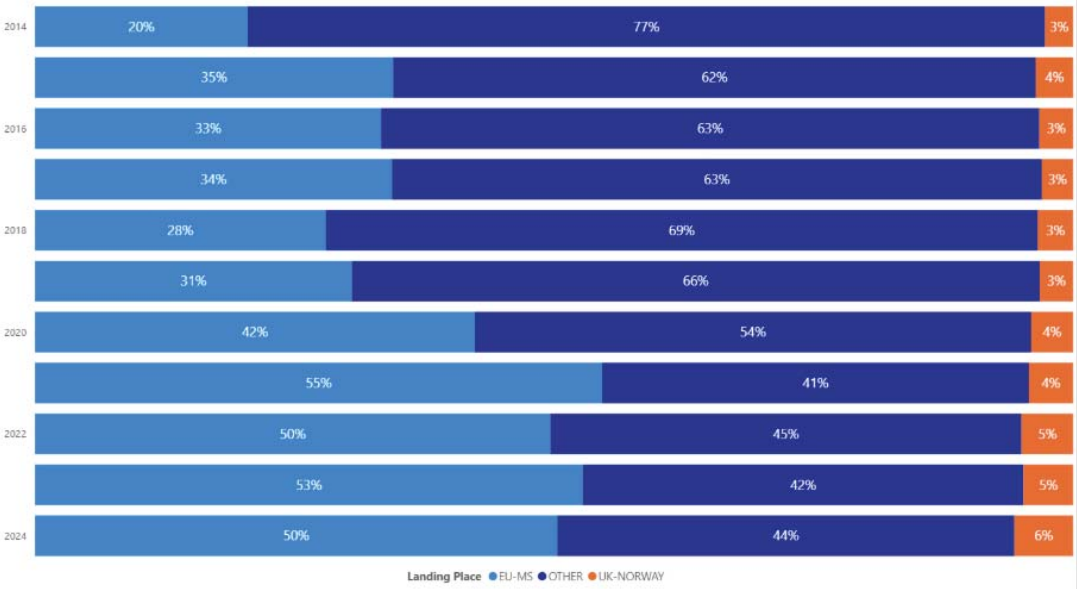



Figure 5 – Place of landing for EU fisheries for catches outside EU waters in 2014-2024. Source: EC Effort and Catch Reporting (ECR).

Figure 6 further disaggregates the 50% of EU landings outside EU waters. The Seychelles emerges as the dominant landing destination outside the EU, accounting for 28% of these landings. Uruguay follows at 20% due to EU fleet operations in the Southwest Atlantic.

Mauritania and Norway account for 12%. Smaller shares are recorded in Kiribati (8%), Côte d'Ivoire (7%), the Faroe Islands (5%), Chile (3%), Senegal (3%) and Peru (2%).

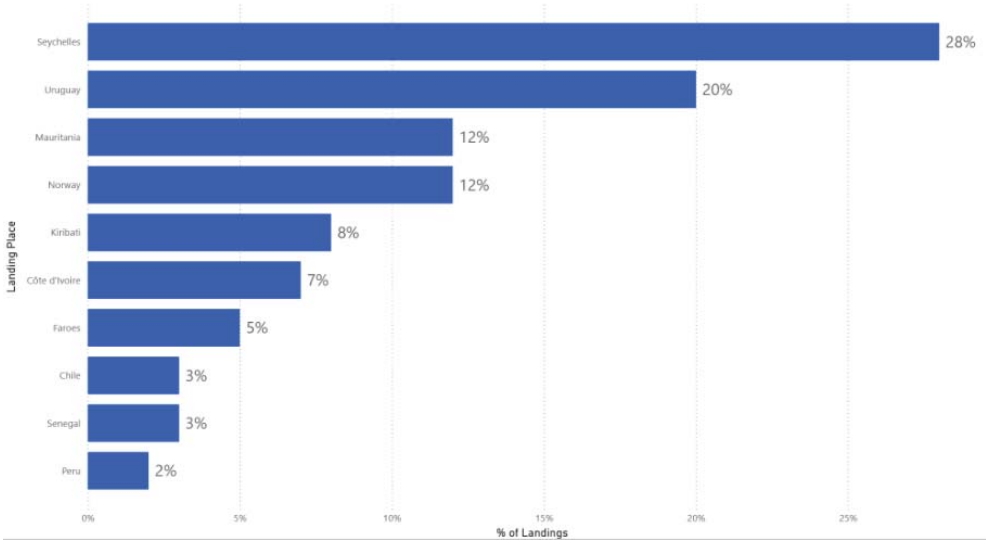



Figure 6 – Top 10 landing places for EU fisheries catches taken outside EU waters. Source: EC Effort and Catch Reporting (ECR) 2024.

## 2.2 The EU external fleet

This section reviews the main characteristics of the EU fleet operating in non-EU waters.

*Authorisations to fish in external waters – overview*

The **EU fleet authorised to operate beyond EU waters**[20] totalled 2 061 vessels in 2025. These benefited from 5 336 fishing authorisations for 2024 and represented 3.7% of the total number of EU vessels[21]. In 2014-2024, the overall trend (Figure 7) was marked by a spike in 2021. The number of authorised EU vessels declined from 2014 to 2020. After Brexit, their share increased from 3.9% (2020) to 6.9% (2021) due to the need for authorisations to fish in UK waters. The trend has shown a decline since then, reaching 3.7% by 2024.

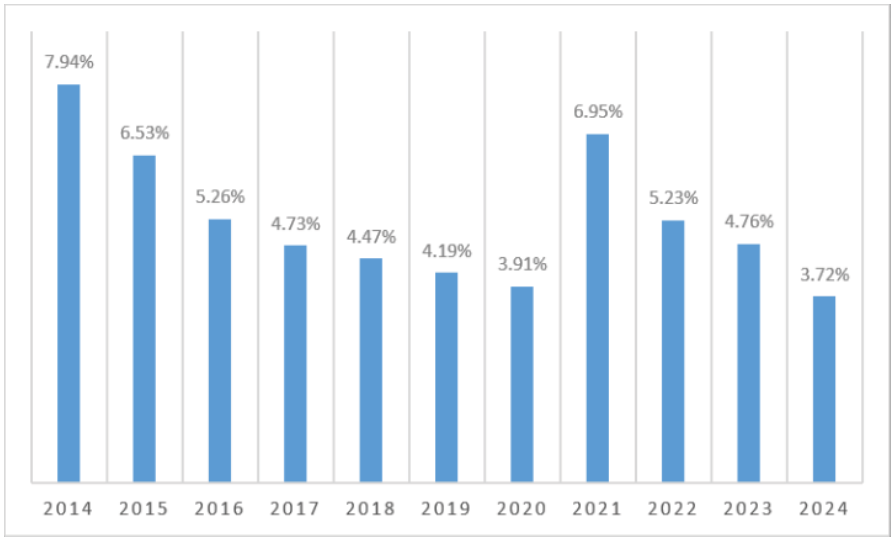



Figure 7– Percentage of authorised EU vessels to fish in non-EU waters in 2014-2024. Source: EC Fleet Register and EC Licence.

20 ICCAT and GFCM are not covered.

21 There was a total of 68 457 vessels in the EU fishing fleet register on 25 November 2025 (source: European Commission, Fleet Register).

*Authorisations to fish in external waters by main management types*

**The most common type of authorisations for non-EU waters (60%) are covered by the EU's reciprocal agreements with Norway and the UK**. In 2024, there were 3 230 Norwegian and UK authorisations for EU vessels. Conversely, there are 1 572 EU authorisations for Norwegian and UK vessels. Two elements characterise the EU fleets operating in non-EU waters in the Northeast Atlantic. First, they include both small-scale coastal-fleet fishing in British and Norwegian waters, as well as LSF and DWF fishing both in those two jurisdictions and in international waters under the auspices of the Northeast Atlantic Fisheries Commission (NEAFC). In total, 69% of the EU's fleet authorised to operate in UK and Norwegian waters is made up of vessels under 12 metres (2494 authorisations), and 31% is above 12 metres (1114 authorisations). Second, following Brexit, the EU vessels operating in the UK's EEZ constitutes 40% of the fleet in the area: in 2026, 1 312 EU vessels held an authorisation to fish in the UK's EEZ (including 154 within UK territorial waters and 198 under the 'voisinage' agreement between Ireland and the UK). 11 Member States currently fish in UK and British Crown Dependency waters.

**The second most common type of authorisations for non-EU waters (31%) concerns the more distant external waters.** There are 1 889 authorisations for 523 EU vessels (i.e. less than 1% (0.76%) of the EU fishing fleet)[22]. Not all vessels are actually active. In 2014-2023, an average of about 8% of the DWF vessels (i.e. above 24 metres) were **inactive**. The share was lowest in 2016 (1.5%) and highest in 2021 (12.2%).

Moreover, the existence of an authorisation does not imply that the vessel concerned takes most of its catches in external waters. It may not even use the authorisation. It is therefore useful to examine whether a vessel was **active** in the area described in the licence.

Table 1 shows the presence of authorised vessels above 12 metres fishing in non-EU waters in 2022-2024, on the basis of the areas described in the fishing authorisations and the Vessel Monitoring System (VMS) positions[23]. For all the years in question, over 63% of the vessels recorded as present in the authorised area were above 24 metres. Most authorisations (79% in 2022, 81% in 2023 and 2024) originated in reciprocal agreements with Norway and the UK[24]. 41% of these were vessels between 12 and 24 metres in 2022, and 42% in 2023 and 2024.

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22 The authorisations of two RFMOs are not currently included in the fishing authorisations database but can be consulted on their respective websites. These are the International Commission for the Conservation of Atlantic Tunas (ICCAT) and the General Fisheries Commission for the Mediterranean (GFCM). Both have thousands of authorisations for small-scale coastal fishing vessels in the Mediterranean, but most of these vessels are not active in external waters. Adding these authorisations would therefore distort the picture regarding activities in external waters.

23 This analysis begins in 2022, because VMS data completeness before 2022 was insufficient and could lead to inaccurate results. It also excludes vessels with LOA below 12 metres because they are not obliged to transmit VMS data. ICAAT and GFCM are also not included (see footnote 22). The total number of authorisations for each management type was lower than the sum of 'present' and 'not present' vessels because some authorisations covered two periods within the same year and the vessel did not fish in the area in one of those two periods.

24 Reciprocal agreements include authorisations with the British Crown Dependencies Guernsey and Jersey.

| Management type | 2022 | | | 2023 | | | 2024 | | |
|---|---|---|---|---|---|---|---|---|---|
| | No presence | Presence | No of Vessels | No presence | Presence | No of Vessels | No presence | Presence | No of Vessels |
| *Length >=12m <24m* | | | | | | | | | |
| SFPA | 26 | 10 | 32 | 19 | 13 | 27 | 12 | 10 | 17 |
| RFMO | 75 | 5 | 80 | 61 | 24 | 85 | 41 | 25 | 66 |
| Reciprocal (UK+NO) | 405 | 390 | 665 | 445 | 358 | 699 | 370 | 375 | 643 |
| *Length >=24m* | | | | | | | | | |
| SFPA | 77 | 103 | 133 | 67 | 119 | 132 | 56 | 108 | 118 |
| RFMO | 287 | 157 | 348 | 302 | 148 | 374 | 297 | 162 | 385 |
| Reciprocal (UK+NO) | 332 | 464 | 630 | 334 | 443 | 633 | 288 | 451 | 606 |
| Other | 14 | 38 | 52 | 18 | 43 | 61 | 20 | 44 | 63 |
| Direct | 29 | 47 | 63 | 11 | 52 | 55 | 20 | 40 | 47 |
| **Total** | **1 052** | **1 119** | **1 629** | **1 091** | **1 074** | **1 645** | **950** | **1 089** | **1 535** |

Table 1 – Presence of vessels above 12 metres in non-EU waters based on VMS with speed <= 6 knots. Sources: VMS data and EC licences.

*Evolution and main characteristics of the EU external fleet*

The overall EU fleet (both external and internal) has decreased between 2014 and 2023[25]. Most of the decrease was borne by the LSF and DWF vessels. However, while the average age of EU active fishing vessels progressively increased from 26 years in 2014 to 33.5 years, the average age of the DWF was significantly lower (24 years in 2023).

The EU fleet operating in non-EU waters is highly specialised (Table 2) and consists mainly of the following:

- the **tuna fleet**: most of its catches are taken by large purse seiners (PS) flagged by Spain and France (and, to a lesser extent, Italy) that catch tropical tuna species around the world (in the Atlantic, Indian and Pacific Oceans);
- **longliners**: these are flagged mainly by Spain and Portugal (representing 61.3% of that fleet) and mainly target swordfish and blue shark in the central and south Atlantic and the Indian and Pacific Oceans. They are equipped with drifting longlines (LLD), hand lines and pole lines (LHP), set longlines (LLS) and hand lines and pole lines (LHM) that are designed for catching pelagic fish. In total, there are 474 vessels (including 223 from Spain and 68 from Portugal);
- **bottom trawlers**: these operate in the North and Central Atlantic Ocean. They are mainly demersal trawlers from Denmark, Germany, Estonia, Spain, Italy and Portugal (targeting species such as halibut, redfish, cod, hake and shrimp). These vessels are equipped with bottom pair trawls (PTB), single boat bottom otter trawls (OTB), bottom trawls (TB), beam trawls (TBB), bottom trawls and nephrops trawls (TBN) and bottom trawls and shrimp trawls (TBS). In total, there are 1 233 vessels, with 1 066 using OTB. The largest portion comes from Italy, followed by France and Spain;
- **pelagic trawlers**: these are from Germany, Ireland, Latvia, Lithuania, the Netherlands and Poland targeting species such as mackerel, herring, whiting, sardines. 112 of the 127 vessels are equipped with single boat midwater otter trawls (OTM).

25 Evaluation of Regulation (EU) No 1380/2013 (SWD2026 120 final), pp. 33-34.



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| | Purse Seiners PS | Longliners | | | | | Bottom Trawlers | | | | | | | | | | Pelagic Trawlers | | | | TOTAL | % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | LHM | LHP | LLD | LLS | *Total* | OT | OTB | OTT | PT | TB | TBB | TBN | TBS | PTB | *Total* | OTM | PTM | TM | *Total* | | |
| **IT** | 77 | | | | 53 | *53* | | 488 | | | | | | | | *488* | | | | | **618** | **30.52** |
| **ES** | 66 | | 13 | 141 | 69 | *223* | | 111 | | | | | | | 4 | *115* | | | | | **404** | **19.95** |
| **FR** | 22 | 2 | | 20 | 15 | *37* | 1 | 164 | 23 | 1 | 6 | 3 | | | 1 | *199* | 7 | 13 | 1 | *21* | **279** | **13.78** |
| **IE** | 3 | | 2 | | | *2* | | 58 | | | | 9 | | | | *67* | 48 | 1 | | *49* | **121** | **5.98** |
| **EL** | 15 | | | 20 | 8 | *28* | | 69 | | | | | | | | *69* | | | | | **112** | **5.53** |
| **PT** | 4 | | 24 | 31 | 13 | *68* | | 17 | | | | | | | | *17* | | | | | **89** | **4.40** |
| **NL** | | | | | | | | 13 | 5 | | | 54 | | | | *72* | 8 | | | *8* | **80** | **3.95** |
| **DK** | 1 | | | | | | 1 | 60 | | | | 1 | | | | *62* | 8 | | | *8* | **71** | **3.51** |
| **SE** | | | | | | | | 32 | | | | | 4 | 1 | | *37* | 12 | | | *12* | **49** | **2.42** |
| **BE** | | | | | | | | 3 | | | | 43 | | | | *46* | | | | | **46** | **2.27** |
| **MT** | 1 | | | 18 | 16 | *34* | | 10 | | | | | | | | *10* | | | | | **45** | **2.22** |
| **CY** | 2 | | | 25 | 1 | *26* | | 5 | | | | | | | | *5* | | | | | **33** | **1.63** |
| **DE** | | | | | 2 | *2* | | 17 | | | | 8 | | | | *25* | | | | | **27** | **1.33** |
| **PL** | | | | 1 | | *1* | | 11 | | | | | | | 1 | *12* | 10 | | | *10* | **23** | **1.14** |
| **BG** | | | | | | | | | | | | | | | | | 14 | | | *14* | **14** | **0.69** |
| **LT** | | | | | | | | 1 | | | | | | 1 | | *2* | 4 | | | *4* | **6** | **0.30** |
| **EE** | | | | | | | | 4 | | | | | | | | *4* | | | | | **4** | **0.20** |
| **LV** | | | | | | | | 2 | | | | | | | | *2* | 2 | | | *2* | **4** | **0.20** |
| **HR** | 1 | | | | | | | 2 | | | | | | | | *2* | | | | | **3** | **0.15** |
| **Total** | **191** | **2** | **39** | **256** | **177** | *474* | **2** | **1 066** | **28** | **1** | **6** | **118** | **4** | **2** | **6** | *1 233* | **112** | **14** | **1** | *127* | **2 025** | **100** |

Table 2 - EU fleet operating in non-EU waters in 2024 (verified activity with VMS in non-EU EEZs); vessels with LOA >=12m. Sources: EC Fleet Register and VMS data.

*Reflagging*

In 2014-2024, there was significant reflagging of vessels registered in EU Member States to non-EU countries: a total of 311 vessels were reflagged from 15 Member States to 56 different non-EU countries. On average, 28 vessels per year were reflagged. The peak years were 2022 (34) and 2019 (41), but no temporal pattern stands out (Figure 8). By contrast, the origin of the vessels is very concentrated on six EU Member States (Denmark, Spain, France, Latvia, Portugal and Sweden) which together account for 90% of reflagged vessels in average. Spain alone represents 38% (117 vessels) and the five other Member States represent between 7% and 18% (21 to 57 vessels) each. The other Member States concerned are Belgium, Germany, Ireland, Italy, Lithuania, the Netherlands, Poland and Finland.

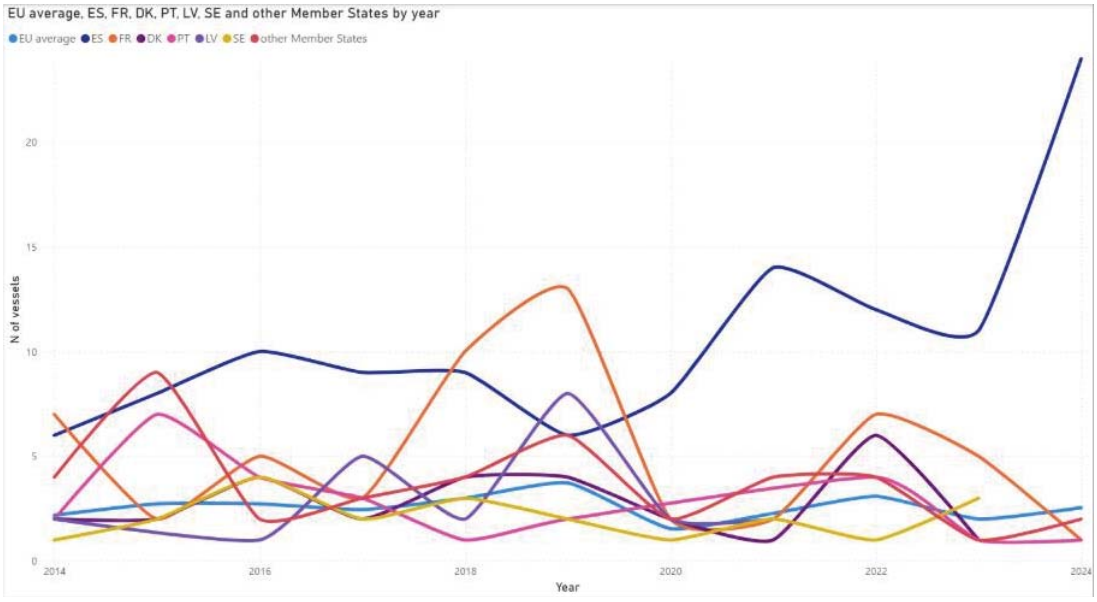



Figure 8 - Evolution of the number of EU vessels reflagged to third countries in 2014-2024. Source: EC Fleet Register.

The destination countries were also quite concentrated (

Figure 9). Nine countries received 10 or more reflagged vessels each, representing 50% of the total number of EU reflagged vessels (156). They were, in descending order: Mauritania, Russia, Morocco, Namibia, Suriname, Belize, Senegal, Dominica and Angola.

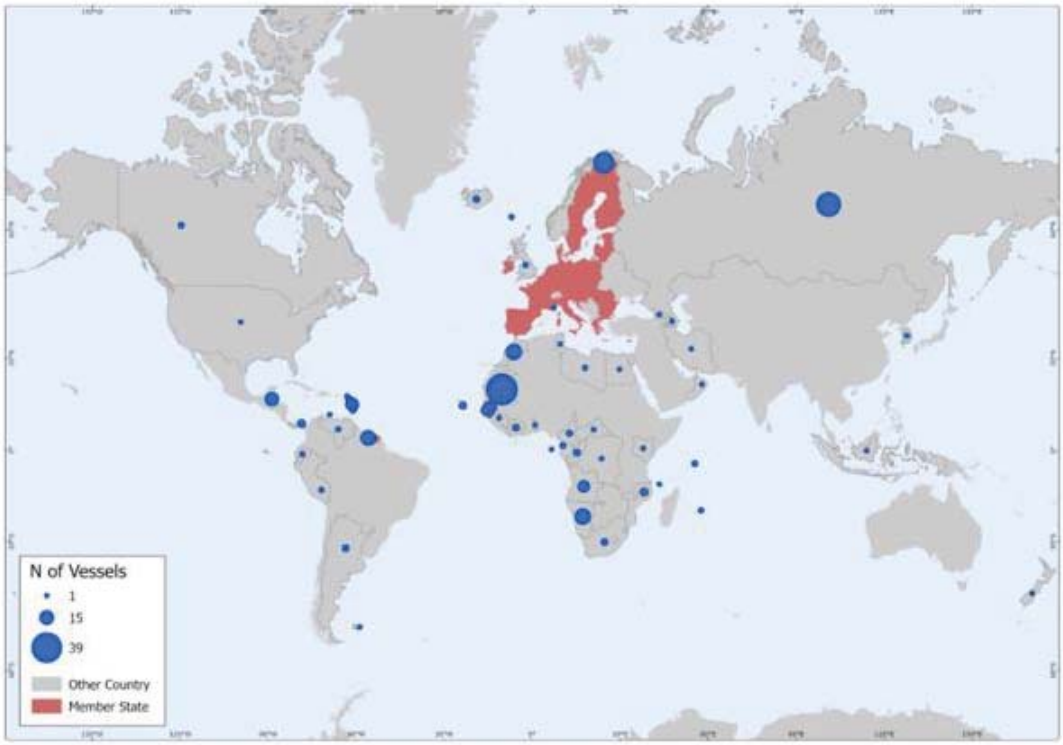



Figure 9 - Number of vessels reflagging from EU Member States to third countries, 2014-2024 – Source: EC Fleet Register.

## 2.3 Economic performance of the EU distant-water fleet (DWF)[26]

Due to the data limitations presented in the introduction to this chapter, this section focuses on the fleet above 24 metres that operates predominantly outside EU waters (i.e. the DWF, as defined by the STECF). The DWF consisted of 239 vessels in 2023.

*Profitability*

The impact assessment accompanying the Commission proposal for the 2013 CFP reform expected the EU fleet's economic performance to improve overall. The weakest improvements would be obtained by the 24-40 metres segment. The performance of the 12-24 metre segment would correspond to the average, whereas the performance of the segment above 40 metres would exceed the average but remain below the small-scale coastal fleet (SSCF).

Overall, the DWF has remained profitable since 2014, except in 2019 and 2020[27]. However, profits and profit margins declined substantially. Indeed, gross value added (GVA) fell from EUR 530 million in 2014 to EUR 353 million in 2023.

[26] Unless stated otherwise, the source for this section is the 2025 annual economic report on the EU fishing fleet (STECF 25-03 & 25-07). The latest available data reported are from 2023.

[27] The 2025 annual economic report on the EU fishing fleet (STECF 25-03 & 25-07) - EU Blue Economy Observatory

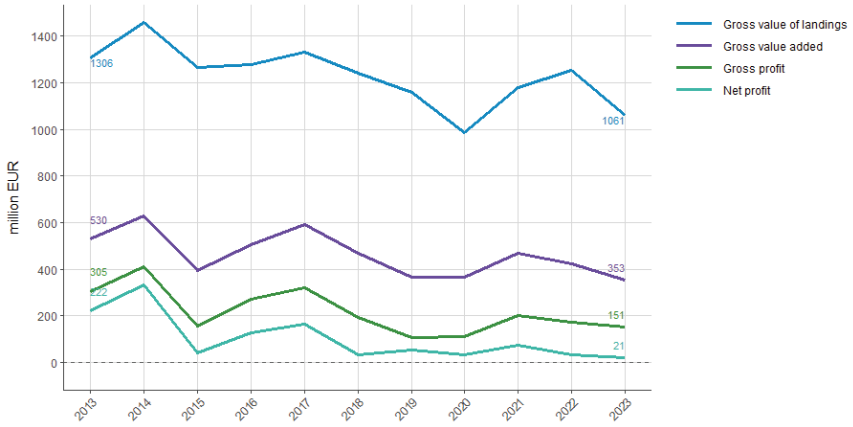



Figure 10 - Economic performance of the DW - Source: own elaboration based on STECF 25-07.

Profitability followed a similar decreasing trend: gross profit more than halved between 2014 and 2023 to EUR 151 million. Net profit margins declined from 22% in 2014 to 2% in 2023 (Figure 11). The situation has worsened significantly in recent years, mainly due to fuel price volatility and a decrease in landing income. Now-cast projections based on 2023 data show that profitability is expected to have moderately recovered in 2025.

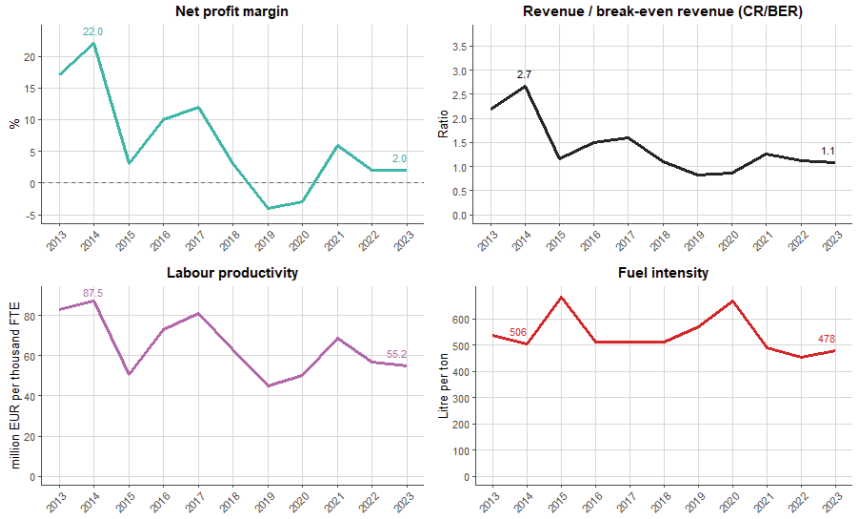



Figure 11 – Trends in key economic indicators for the DWF. Source: own elaboration based on STECF 25-07.

*Employment and wages*

In 2023, the DWF employed 5 790 people, equalling 6 387 full-time equivalents (FTEs). This represented 8.6% of the total number of FTEs in the EU fishing fleet. Employment in the DWF is mostly on a full-time basis. The total number of people employed and the number of FTEs in the DWF both declined in 2014-2023 by about 11% and 13% respectively.

However, the average wage per employee and the average wage per FTE have both increased moderately across the entire EU fleet over the same period. There are significant variations per fleet and Member State[28]. The highest wages occur in the LSF and DWF, with wages in the DWF having been the highest until 2021. For these fleets, half of the coastal Member States register an average wage higher than the national average.

*Changes in fleet composition*

Between 2014 and 2023, the number of vessels operating in the DWF decreased by 20%. This is similar to the decrease in total tonnage (from 286 000 GT to 243 000 GT, i.e. -15%). The total engine power decreased less (from 378 000 kW to 327 000 kW, i.e. -13%). The value of

28 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), Annex VI, Figures 34 and 35.

physical capital per vessel increased accordingly from EUR 2.1 million in 2014 to EUR 2.6 million in 2023. For comparison, values of physical capital per vessel for the LSF and SSCF were on average EUR 0.4 million and EUR 0.02 million respectively.

DWF vessels are on average younger than vessels in the SSCF and LSF (Figure 12). In 2023, the average age in the DWF was 25 years old, as compared with around 34 years for the rest of the EU fishing fleet. The DWF is nevertheless following the same ageing trend as the SSCF and LSF.

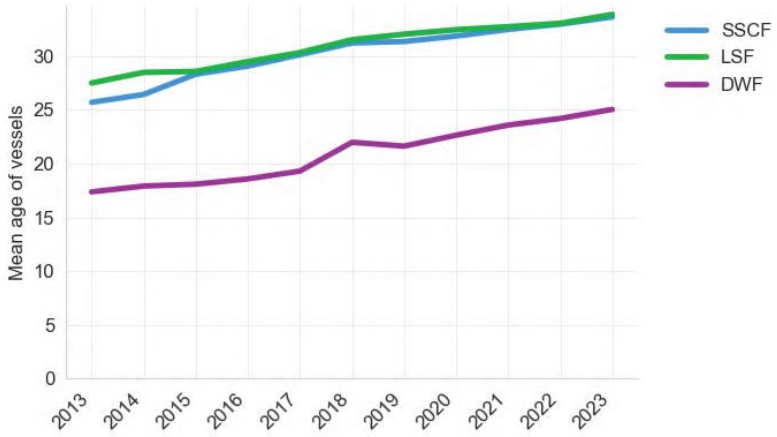



Figure 12 – Trends in mean age of vessels by fishing activity. Source: own elaboration from STECF 24-07.

*Drivers of economic performance*

**Fuel intensity** (i.e. fuel consumption per volume of landed product) has declined moderately since 2013. The fleet remains vulnerable to increases in energy prices. Indeed, the peak in energy prices in 2022 reduced the fleet's profitability, despite a slight increase in the gross value of landings.

**Energy costs** account for a larger share of total operating costs in the DWF than in the LSF and SSCF (32% compared with 27% and 15%, respectively), making the DWF more exposed to energy price volatility than other fleet segments. The share of energy costs in total operating costs varies due to fluctuating energy prices. This share increased from 29% in 2014 to about 32% in 2024, but the average between 2016 and 2021 was about 20% – a sharp increase that reflected high fuel prices.

**Direct emissions** from the DWF decreased by about 16% between 2014 and 2023. The DWF accounted for 21% of total energy consumption and direct greenhouse gases (GHG) emissions in 2023 while accounting for 0.5% of the vessels in the EU fleet (239 vessels), 21.5% of total gross tonnage (GT) and 8% of total engine power.

**Labour productivity** (measured as GVA per FTE) declined from EUR 85.000 in 2014 to EUR 55.000 in 2023. This development was mainly driven by the decrease in GVA, because the number of FTEs remained relatively stable in 2013-2023. Overall, productivity indicators of the DWF either decreased or remained stable in 2013-2023.

*Investment*

Annual investment in the DWF amounted to EUR 44 million on average between 2014 and 2023, but with large fluctuations and reaching historically low levels of around EUR 10 million in 2023. Overall, the DWF's current economic performance may reflect limited investment in fleet modernisation. This may hinder productivity and cost-efficiency improvements, while weak economic returns in turn reduce the capacity and incentives to invest.

## 2.4 EU external trade[29]

This section examines the EU's economic relation with the rest of the world as regards trade in fishery and aquaculture products (FAPs). It does not distinguish the method of production (wild caught or farmed) for substantive and technical reasons. Trade in aquatic products is global and driven by overall industrial and final demand, which can be met by either fished or farmed products. Trade statistics based on customs codes are not disaggregated according to the method of production of any given good. Consequently, the trade regimes under which the EU trades in aquatic products do not distinguish farmed from caught products.

*Overall EU supply: a globalised value chain*

**Globally, the EU is a minor producer of FAPs**, accounting for only 2% of world production. There is a growing gap with major Asian producers, whose output is driven primarily by aquaculture. By contrast, the EU is the fourth largest consumption market for FAPs (behind China, India and Indonesia).

In terms of trade, **the EU's trade flows in FAPs are second only to China's** (Figure 13). The EU is the largest importing region, representing 41% of the global import value in 2024; its share has however been gradually declining since its peak in 2007[30]. Asia accounted for 34% of global imports and Northern America for 17%, while Latin America and the Caribbean, Africa and Oceania each held relatively small shares (3%, 3% and 1%, respectively). Asia occupies a pivotal position in the trade of global aquatic animal products. In 2024, it was the main origin of imports (by value) in Oceania (69%), Northern America (40%) and Africa (33%), with 47% reflecting Asia's intraregional trade. Europe and Latin America and the Caribbean relied more heavily on intraregional trade, but Asia was their largest supplier.

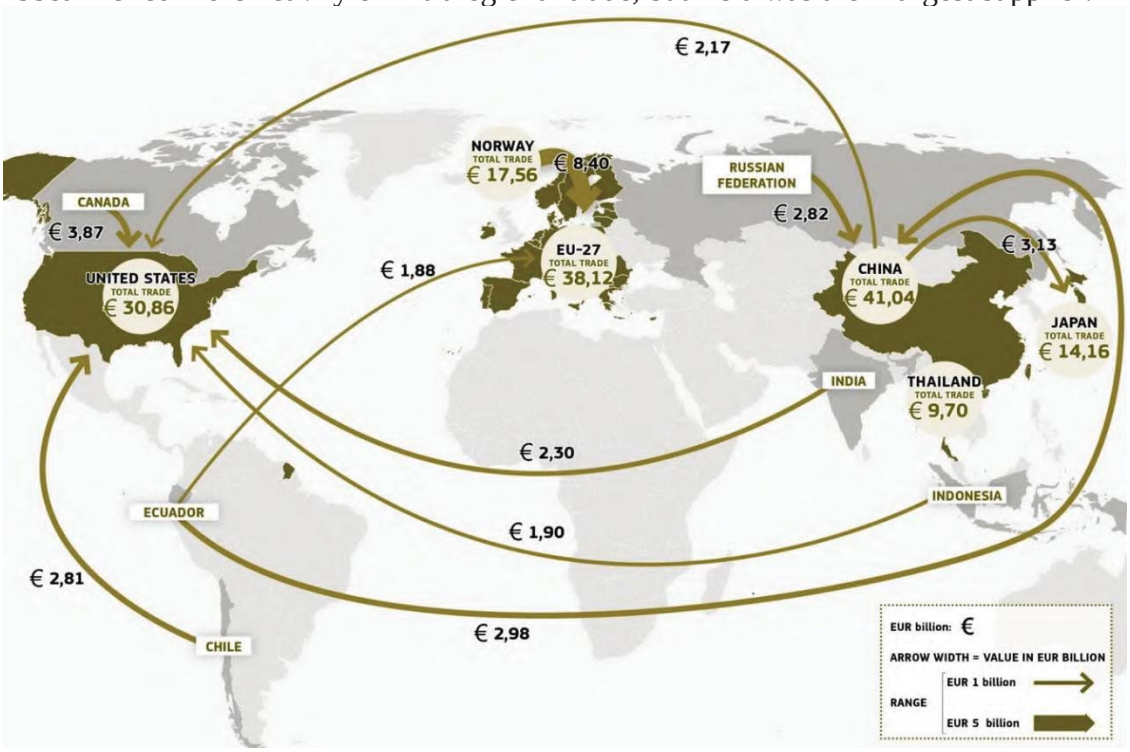



Figure 13 – Top 10 trade flows in value of fishery and aquaculture products in the world (2024, nominal values). Source: EUMOFA 2025.

In 2023, the EU's supply of FAPs for human consumption (including both domestic production and imports) totalled 12.38 million tonnes in live weight equivalent (LWE). This represented

[29] Unless otherwise stated, the source for this section is the EUMOFA report of 2025, in which the latest data available are for 2024.

[30] The State of World Fisheries and Aquaculture 2026, FAO, p 93.

the lowest level in 2014-2023. The supply had been declining since 2018, except for a brief uptick between 2020 and 2021 that followed a sharp drop in 2020 due to the COVID crisis. As a result, the EU's estimated **apparent consumption** fell by 2%, reaching 10.25 million tonnes LWE. This was the lowest level in 10 years and nearly 240 000 tonnes LWE less than in 2022.

*Overall trends of EU trade in fishery and aquaculture products*

Between 2015 and 2024, **the value of EU trade in FAPs – the sum of its imports and exports with third countries – grew by 18% in real terms** and 2% in volume, with a compound annual growth rate of 2% in real terms. In 2024, the EU's trade in FAPs decreased by 3% in volume and 4% in value, reaching 8.1 million tonnes with a total value of EUR 38.1 billion. This was the lowest volume (it had averaged 8.5 million tonnes in the previous five years) and the third-highest real and nominal value recorded in 2015-2024.

In the same period, the EU has constantly been a net importer[31]. **In 2024, the EU's trade deficit reached EUR 21.6 billion**, a 5% improvement on 2023. This was due to imports decreasing by 1% while exports increased by 1%.

Since the 1990s, the **EU's self-sufficiency**[32] **in seafood products** has been declining (Figure 14). EU production of aquatic food now covers only 38.1% of EU consumer demand. In 2014-2025, the EU's self-sufficiency in FAPs reached a high point of 46.1% in 2014, largely driven by strong production (particularly in the fisheries sector). A clear downward trend has emerged since 2018.

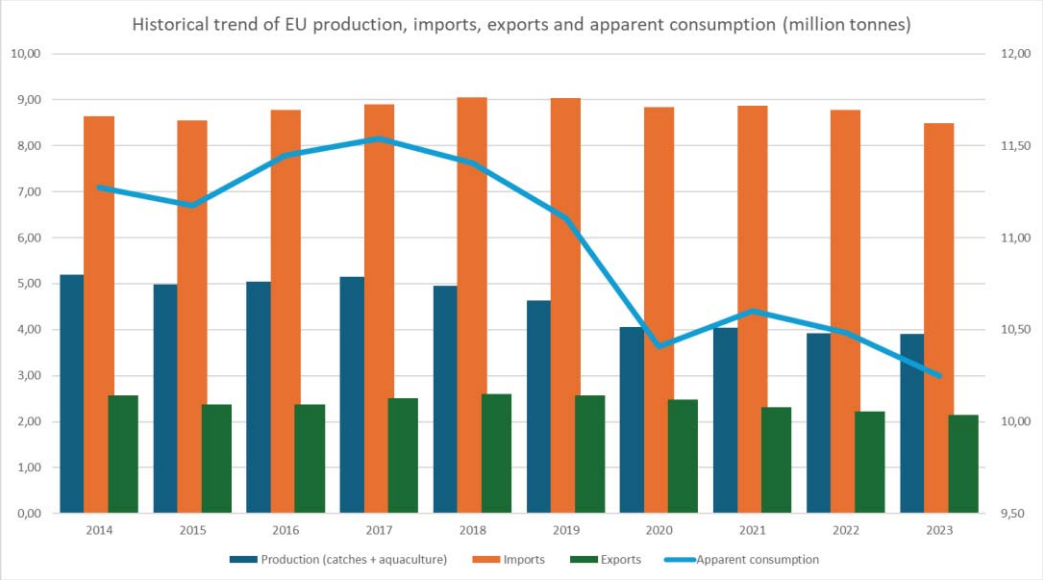



Figure 14 – Historical trend of EU production, imports, exports and apparent consumption (million tonnes) – Source: EUMOFA 2025.

31 It is important to note that import data do not identify the catch of the EU LDF that is landed in third countries, where they are processed and from where they are then exported to the EU. The statistics count these products as imports. This information will be more easily retrievable and analysable once the new IT system CATCH is fully functional. CATCH will contain information about the origin of the fish, because the catch certificates issued by the EU Member States will have to be input into the system in cases where the fish is processed in third countries and then exported to the EU.

32 Self-sufficiency is defined as the capacity of EU Member States to meet demand through their own production. It can be estimated by calculating the ratio of domestic production to apparent domestic consumption.

*Import dependency for the most consumed products*

**The EU's structural reliance on imports is particularly pronounced for the five most consumed species in the EU** (tuna, salmon, cod, Alaska pollock and shrimps). An important share of these species is imported by the EU processing industry and sold to final consumers in processed forms – for example, as canned (tuna), cooked (shrimp), filleted and sometimes breaded (Alaska pollock and cod) and smoked (salmon).

In 2023[33], the EU had an overall self-sufficiency of just 12% for these five species, which together represented 44% of the EU's total apparent consumption of FAPs:

- **Tuna**: despite being caught by EU vessels, tuna is not produced in sufficient quantity to meet consumer demand. The 34% self-sufficiency rate is the highest among the five most consumed species in the EU.
- **Salmon**: EU production is marginal, which explains the 1% self-sufficiency rate. Norway supplies most of the salmon imported by the EU. The EU aquaculture sector is not expected to drastically increase its production capabilities.
- **Shrimp**: with a self-sufficiency rate of 11%, consumption largely relies on imports, particularly for warm-water species such as *Penaeus monodon* and *Penaeus vannamei*.
- **Alaska pollock**: EU production is non-existent, so the self-sufficiency rate is 0%. There is limited scope for substitution by other EU-produced whitefish due to price and availability constraints (only Russia and the USA currently harvest Alaska pollock in their EEZs).
- **Cod**: the self-sufficiency rate is 5% and EU production is insufficient to meet EU demand.

**EU total aquatic food imports are moderately concentrated on some origin countries.** The top EU sources of imports (Norway, Morocco and China) represented, respectively, 29%, 6% and 6% of EU total import value in 2023. Dependency on Norway is mostly driven by imports of salmon. Among the most imported main commercial species, salmon from Norway, octopus from Morocco and Alaska pollock from Russia (possibly reimported from China) were the species with the most value exposed to import dependency risks in 2023.

**EU total aquatic food exports are well diversified**. The USA, the UK and Norway represent 15%, 13%, and 10% of EU total export value respectively. Only 8% of the value of fishery and aquaculture exports is highly concentrated, mainly in exports of shrimp (cold water) to China, halibut (Greenland) to China and tuna (bluefin) to Japan.

*Trade and market aspects in the Northeast Atlantic*

Brexit's effects remain visible several years after it took place. While substantial volumes of FAPs are still traded between the EU and UK, higher transaction costs, additional checks and more complex logistics have become permanent features of the supply chain. These effects differ across fleets, species groups and Member States, depending on their historical dependence on access to UK waters or on imports of FAPs of UK origin.

**EU imports of FAPs from the UK grew steadily before dropping in 2021**: they fell from around 450 000 tonnes in 2019 to about 322 000 tonnes in 2022 and have remained more than 14% below pre-Brexit levels. Import values followed the same pattern, decreasing from nearly EUR 2 billion in 2019 to roughly EUR 1.6 billion in 2024, indicating a permanent loss of UK market share rather than a temporary post-Brexit adjustment. In 2024, the overall value and volume of imports from the UK represented 6% of all EU imports, while EU exports to the UK represented 10% in volume and 13% in value of all EU exports, ranking them third and second

[33] The self-sufficiency ratio is not yet available for 2024.



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respectively. This is to be compared with Norway, which represents, in value, 29% of EU imports and 12% of EU exports.

**For the UK, the overall share of trade in FAPs with the EU fell sharply** to 24% by volume in 2024. The UK is increasingly reliant on non-EU suppliers, such as Norway, Iceland and the Faroe Islands. Compared with 2020, UK imports from Norway in 2024 rose by 79% in volume and by more than 300% in value. Imports from Iceland increased by 24% in volume and 28% in value. The Faroe Islands expanded exports to the UK by 47% in volume and 34% in value.

*EU import regimes*

**Nearly half of EU imports of fisheries and aquaculture products benefit from preferential arrangements under free-trade agreements (FTAs)** established between the EU and more than 70 countries around the world (Table 3). The share of FTA imports is likely to grow in the coming years with new trade agreements becoming effective (particularly with Mercosur countries and India) and agreements being negotiated (e.g. South-east Asian countries). This will be at the expense of the share of non-preferential imports (most favoured nation (MFN) regime) that today represent 39% of EU imports.

**A further 7% are imported under the EU's autonomous tariff quotas (ATQs)**, which are used to ensure appropriate and diversified supply for the EU's processing industries. A similar share of imports comes from the developing countries that benefit from the EU preferences under the **Generalised System of Preferences (GSP)**.

| Trade regime | Volume | Share |
|---|---|---|
| FTAs | 2 843 | 47% |
| MFN | 2 341 | 39% |
| GSP | 440 | 7% |
| ATQs | 421 | 7% |
| **Total** | **6 045** | **100%** |

Table 3 – Structure of EU 2025 imports by trade regime (in 1 000 tonnes). Source: Eurostat.

*Impact of imports on EU (first sales) prices*

The impacts of imports on prices of FAPs differ according to the species, the production method and the destination of the product. Market segmentation is a major factor when considering the impact on a specific species.

**Overall, imports from non-EU countries complement EU production** by providing species that are either not produced in the EU at all or not in sufficient quantities (see above). They therefore play an important role in meeting processing sector demand and consumer demand. They also help make aquatic food affordable. This is typically the case for white fish.

Nevertheless, for **some farmed species** (e.g. seabream and seabass from Türkiye), there is clear competition with EU products, and this puts downward pressure on prices. However, in the view of stakeholders and experts gathered by the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA) and DG MARE, these imports also contribute to developing the market by providing visibility and creating new demand for these species.

There are cases of **substitution** between imported species and EU products. For example, imports of salmon impact demand for, and first-sale prices of, EU trout: when the price of salmon is quite high (including when the Norwegian krone rises against the euro), consumers tend to replace it with trout.

By contrast, for **species that the EU exports in large quantities** (e.g. herring and mackerel), there is no substantial pressure on prices due to imports. Imports from Norway and Iceland for the fresh market do create a certain degree of competition, but their prices and limited quantities do not indicate that they have a very material impact.

# 3 EU POLICY ACHIEVEMENTS – CONTRIBUTING TO LONG-TERM SUSTAINABILITY WORLDWIDE

Significant progress has been made in achieving the objectives set out in the 2011 Commission Communication. This chapter builds on and further develops the key findings of the evaluation of the CFP Regulation[34].

## 3.1 Upholding and strengthening fisheries governance at global level

At global level, the EU has promoted sustainable and effectively managed fisheries by engaging with international frameworks and consistently promoting wider participation in, and effective implementation of, international fisheries instruments[35]. Their objectives and key obligations are reflected in the EU's broader fisheries control, monitoring and enforcement framework, including through the IUU Regulation. More generally, the EU promotes compliance with applicable international fisheries instruments and standards in multilateral forums and bilateral dialogues. This includes encouraging non-Parties (particularly major distant-water fishing nations) to align themselves with internationally agreed obligations and practices.

The EU's efforts under the **UN Fish Stocks Agreement (UNFSA)** for managing straddling and highly migratory fish stocks have been equally robust. The EU played a constructive role in the 2023 UNFSA Review Conference by calling for stronger compliance, science-based management and greater transparency; addressing emerging challenges; strengthening RFMO performance; and bridging gaps between the UNFSA and other international agreements. The EU helped steer the conference towards practical recommendations that reinforce the UNFSA's effectiveness. The EU's continuing financial, technical and diplomatic support has helped ensure that UNFSA remains a cornerstone of sustainable fisheries management.

The EU's continuing collaboration with the **FAO** has been crucial in addressing emerging challenges identified in the FAO Blue Transformation Roadmap 2022-2030, from climate change to overfishing, while also ensuring that aquatic food systems remain sustainable, equitable and resilient. The EU's ability to build coalitions, fund innovation and campaign for strong policies by combining financial support, policy leadership and technical expertise has contributed to shaping global fisheries governance. Cooperation with the FAO has delivered tangible results by strengthening global fisheries governance, combating IUU fishing and promoting sustainable fisheries and aquaculture. This includes support for the adoption and effective implementation of international agreements such as the Port State Measures Agreement (PSMA) (see below). It also includes the development and uptake of FAO guidance on small-scale fisheries, transhipment, catch-documentation schemes and sustainable aquaculture. In addition, cooperation with the FAO has played an important role in supporting the integration of biodiversity objectives into fisheries management.

## 3.2 Transforming our dialogues into working partnerships

The **EU's bilateral dialogues on ocean and fisheries** with Australia, Canada, Chile, China, Indonesia, Japan, New Zealand and the USA have provided important platforms for exchanging information, discussing emerging issues and promoting mutual understanding on fisheries management and broader ocean governance matters. They also facilitate the identification of areas of common interest and cooperation in international forums (FAO, RFMOs and processes related to the implementation of international fisheries instruments).

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34 Particularly Section 3.3.7 (Evolution of the EU's international presence and action) and Section 4.1.1 (Effectiveness) in Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final).

35 See Annex I for a description of international fisheries legislation.



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### 3.3 Putting an end to illegal, unreported and unregulated (IUU) fishing

**The IUU Regulation[36] has proved to be a transparent, effective and non-discriminatory instrument** that ensures that fishery products obtained from IUU fishing activities occurring anywhere in the world do not reach the EU market. It is applicable to all countries and vessels engaged in the commercial exploitation of fishery resources and to all EU nationals involved in fishing activities under any flag.

**IUU joint statements** have been signed with Canada, Japan, Korea and the USA. IUU working groups have been organised with China, Japan, Korea, Taiwan, Thailand and the USA. The EU also adheres to the objectives set out in the IUU Alliance Pledge[37].

**The EU has engaged in official bilateral dialogues with many countries**[38]. The EU has supported fundamental reforms that have led to revisions of national legislation in line with international obligations; stronger administrative structures; and improved monitoring, control and surveillance (MCS) systems.

The **catch certification scheme** established by the IUU Regulation has proven effective in keeping IUU fish out of the EU market. Some 93 countries have notified the Commission with details of their authorities that are authorised to validate the information required in the catch certificates. On average, around 200 000 catch certificates and 25 000 processing statements are submitted to the Member States' competent authorities for imports every year.

The EU catch certification scheme has nevertheless been undermined by its uneven implementation in the Member States and by constraints imposed by the paper-based system. The EU has therefore **moved to an electronic system**: CATCH. The use of this EU-wide real-time digital system became compulsory on 10 January 2026 for the management of all procedures linked to the EU catch certification scheme, from the source of the product (the exporting flag state) to the final destination (the market state). CATCH enables the Member States' competent authorities to more efficiently identify products that have been obtained from IUU fishing, and to harmonise risk management and border controls. CATCH is a gamechanger: it is the first-ever EU-wide real-time system for harmonised border controls under the IUU Regulation. It has the potential to influence the policies of supplier countries and to set a benchmark for key market states through interconnection as CATCH can be used directly by non-EU countries. This promotes digitalisation globally, in line with the FAO Voluntary Guidelines on Catch Documentation Schemes.

**The EU's action under the IUU Regulation has been praised internationally** for driving other countries towards compliance and strengthened fisheries governance. Worldwide awareness of the importance of combating IUU fishing has increased significantly. G20 and G7 statements, as well as several regional or multilateral IUU fishing alliances and declarations, show that increased attention is being paid to this phenomenon. They also underline the urgency of further action by all relevant states.

**Several countries have taken a more active stance** on IUU fishing and have shown willingness to take stronger actions. An increasing number of countries are interested in adopting catch certification schemes and are looking to exchange best practices with the EU. Many RFMOs are developing catch documentation schemes, thus demonstrating their ownership of reforms that bring national fisheries control systems into conformity with international standards.

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36 Council Regulation (EC) No 1005/2008 of 29 September 2008 establishing a Community system to prevent, deter and eliminate illegal, unreported and unregulated fishing.

37 Illegal, Unreported and Unregulated Fishing Action Alliance Pledge – GOV.UK (www.gov.uk).

38 More detail in Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 55.

**Several international agreements represent a significant evolution** over the last 15 years in terms of mobilisation in fighting IUU fishing. Before the World Trade Organisation (WTO) agreement on fisheries subsidies (see below), the **PSMA** was adopted in 2009 and entered into force in June 2016. It was the first binding global instrument that aims at fighting IUU fishing, focusing on strengthening and harmonising port controls to prevent illegally caught fish from entering the global market. From the outset, the EU has supported the adoption of such agreement and then has been at the forefront of promoting its ratification and effective implementation, including by strengthening the capacities of developing countries through its contribution to the FAO PSMA Global Capacity Development Programme; supporting the participation of developing countries in the meetings held under the PSMA; and contributing to the development and use of PSMA tools (e.g. the PSMA Global Information Exchange and the FAO's Global Record of Fishing Vessels).

## 3.4 Contributing to a more effective functioning of regional fisheries management organisations (RFMOs)

### *3.4.1 Introduction*

The EU is currently a member of 17 RFMOs (

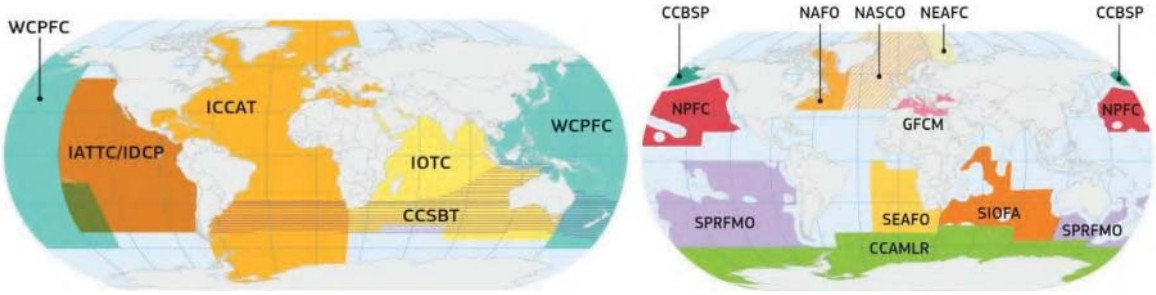



Figure *15*) and two regional fisheries advisory bodies: the Western Central Atlantic Fishery Commission (WECAFC) and the Fishery Committee for the Eastern Central Atlantic (CECAF). 5 of the 17 RFMOs are tuna RFMOs[39]. This participation makes the EU one of the most prominent players in such organisations.

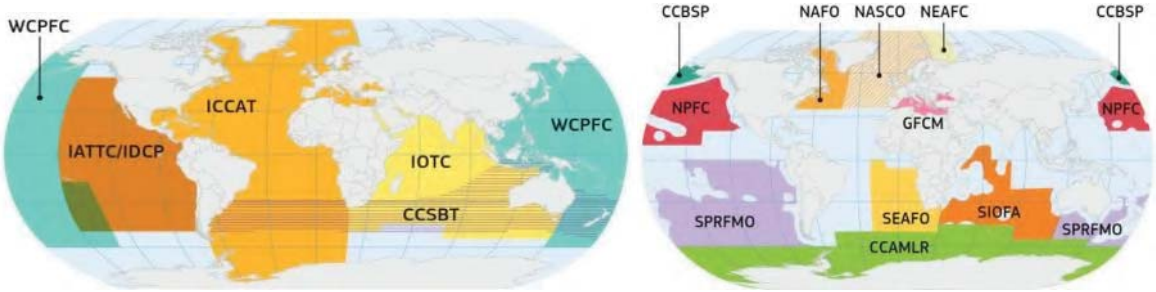



Figure 15 – RFMOs of which the EU is a member (left: tuna RFMOs; right: non-tuna RFMOs). Source: European Commission, Facts and Figures on the common fisheries policy, 2022.

Through the 2013 CFP reform, the EU sought to lead the process of strengthening RFMOs' performance in conserving and managing marine living resources under their purview. In addition, the EU priority was to promote robust science to underpin decision-making as well as a culture of compliance based on effective MCS tools. It was also to fight IUU fishing at regional level. Increased funding of RFMOs for strengthening data collection and scientific processes would help close gaps in knowledge, improve stock assessments and underpin science-based decisions.

39 See details on RFMOs in Annex I.

### *3.4.2 Achievements*

**RFMOs have consolidated their role** of promoting the long-term sustainability of the stocks under their purview. Today, countries generally recognise the need to cooperate with and within those organisations. At the 36th Session of FAO Committee on Fisheries (COFI) in 2024, Members reaffirmed the critical role of RFBs in achieving effective fisheries management, implementing international instruments, addressing climate change impacts, and integrating biodiversity concerns into the conservation and sustainable use of aquatic living resources[40]. This recognition has brought the creation of new RFMOs (e.g. SPRFMO, SIOFA and NPFC) and increased the number of members and cooperating non-members in existing RFMOs. FAO Area 41 is currently the only high seas area where a RFMO does not cover fisheries resources (other than highly migratory species).

**The EU's participation in RFMOs has been crucial**[41]. Since 2014, the EU joined three new RFMOs and obtained access to new fishing grounds and fishing opportunities, particularly in the North Pacific Ocean. RFMOs have continued to contribute significantly to the EU's supply of a variety of species (including highly migratory species), but overall landings by the EU DWF decreased in 2014-2024[42]. The EU has promoted EU standards, the CFP objectives and the implementation of international commitments. It has also steered the international agenda towards achieving SDG 14.4 and has remained a key player in many RFMOs[43].

In the **Mediterranean and Black Seas**, the EU and its Member States are a driving force in the work of the General Fisheries Commission for the Mediterranean (GFCM) to ensure the sustainable management of shared stocks. At the EU's initiative, the MedFish4Ever[44] and Sofia Ministerial[45] declarations were adopted in 2017 and 2018 respectively. These created new momentum to redress the governance of fisheries in the two sea basins and were the basis for sector-specific strategies (i.e. the regional plan of action against IUU fishing, the regional plan of action for small-scale fisheries and the aquaculture strategy). This governance process was consolidated with the GFCM's mid-term strategy (2017-2020) and its successor (2021-2030). The current strategy brings together different sectors of the blue economy; promotes a multidisciplinary approach; and builds on the overarching principle of solidarity, based on technical cooperation, knowledge-sharing and partnerships. The two successive strategies allowed modernising the GFCM and strengthening the role of its secretariat. Over the last five years, the EU has successfully promoted the adoption of 75 conservation and control measures under the GFCM (35 measures were adopted in 2021 alone) to address some of the key stocks and environmental and ecosystem challenges. The latest GFCM report on the state of the Mediterranean and Black Sea fisheries[46] recorded the first positive results of these efforts.

Similarly, in the **Atlantic**, the EU leadership has played a crucial role in achieving the successful recovery and sustainable management of bluefin tuna; adopting a comprehensive management plan for North Albacore; adopting a rebuilding plan for Mediterranean Albacore; adopting management measures for blue shark and shortfin mako in the International Commission for the Conservation of Atlantic Tunas (ICCAT); and adopting measures for Greenland sharks in NEAFC.

In the **Pacific**, the EU was behind the first measure ever adopted by an RFMO to regulate squid fishing and jack-mackerel recovery plan in the South Pacific Regional Fisheries Management Organisation (SPRFMO). It has also supported the work on the recovery of Pacific bluefin tuna

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40 The State of World Fisheries and Aquaculture 2026, FAO, p128.

41 More detail in Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), pp. 53 and 68-69.

42 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), pp. 62 and 68-69.

43 More detail in Evaluation of Regulation (EU) No 1380/2013 (SWD2026 120 final), Annex VI, Table 43.

44 Ministerial Conference on the sustainability of Mediterranean fisheries, Malta, 30 March 2017.

45 High-Level Conference on Black Sea Fisheries and Aquaculture, Sofia, 7 June 2018.

46 FAO, The State of Mediterranean and Black Sea Fisheries 2020.

(IATTC and WCPFC) and southern bluefin tuna (CCSBT). In the Atlantic, Pacific and Indian Ocean, the EU has pushed for stricter regulation, better monitoring and full biodegradability and non-entangling designs for fish aggregating devices. It has also actively supported the adoption of management procedures based on management strategy evaluation (MSE) frameworks[47], mitigation measures for bycatch, the protection of vulnerable marine ecosystems and the banning of shark finning. In many ways, several of the measures adopted following EU leadership were a milestone in fisheries management. Other organisations have since adopted similar measures.

**Substantive progress has been made in scientific advice and science-based fisheries management.** This is largely due to the EU's contribution. In 2014-2024, data collection in the EU expanded in terms of scope and new requirements, and this has been essential in meeting the needs of end users, including RFMOs and SFPAs. This also enabled a substantial increase in the number of conclusive assessments for stocks in the International Council for the Exploration of the Sea (ICES) and RFMO areas in 2014-2024 as well as using MSE and management procedures in operational fisheries management[48].

**Several RFMOs have undertaken performance reviews**, often at the EU's suggestion and/or with its financial support[49]. Performance reviews have become a regular and accepted process in RFMOs.

**The EU's significant voluntary financial contributions (EUR 98 million) were crucial** to achieving these improvements. They funded the scientific and technical work of RFMOs' subsidiary bodies and working groups that would not have been possible without that support[50].

**As a result of these efforts, significant progress has been made toward meeting conservation and sustainability objectives**. In tuna RFMOs, the share of the commercially exploited tuna stocks not subject to overfishing increased from 43% in 2014 to 87% in 2024. By contrast, the trends for stocks managed by non-tuna RFMOs have been more diverse – with positive trends in, for instance, the North-West Atlantic and Southern Oceans but mixed trends in West Africa[51].

## 3.5 Towards sustainable fisheries partnership agreements (SFPAs)

### *3.5.1 Introduction*

The revisions of the CFP in 2002 and 2013 aimed to, successively, establish and improve the legal framework applying to EU fishing vessels in the waters of third countries. The overall objectives were to ensure that all these EU vessels are subject to supervisory and transparent regulations, and that this benefits all parties and enhances fisheries governance.

**In 2002, the bilateral agreements were reshaped into fisheries partnership agreements (FPAs)** and sought to strengthen partner countries' capacity in fisheries, while access to fishing opportunities would be set in the light of the best scientific advice available. The 2002 reform thus signalled that the fisheries agreements are no longer exclusively commercial in nature.

**With the 2013 reform, the agreements were renamed 'sustainable fisheries partnership agreements' (SFPAs).** Sharing the costs of access to third-country waters between public and private actors while also increasing the EU's financial contribution to sectoral support in partner

47 MSE is a tool that scientists and managers can use to simulate the workings of a fisheries system and test whether potential harvest strategies can achieve the pre-agreed management objectives. Management procedures are sets of procedures that guide the implementation of MSE.

48 More detail in Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 51 and Annex VI Tables 34-40 and 43.

49 More detail in Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 69.

50 ibid.

51 More detail in Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), pp. 26-27, 57 and 69 and in Annex I.



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countries would allow EU funds to focus more on reinforcing the scientific base of fisheries management, MCS, as well as on development policy goals. By decoupling SFPAs' sectoral support from payments for access rights, the reform would enable better alignment with other EU development instruments and allow the EU to respond more promptly to weaknesses in supporting implementation. EU payments to third countries under SFPAs therefore have three components: a contribution from the EU budget to cover access rights to fishery resources in third countries' EEZs; a contribution from the EU budget to support third countries fisheries sectors and fisheries policies (i.e. a development component); and a component paid by EU shipowners (including fishing authorisation and environmental fees).

The agreements can target only the surplus of the allowable catch (as stated in UNCLOS). SFPAs also include an exclusivity clause (i.e. if the EU has a fisheries agreement with a third country, EU vessels cannot operate in that third country's waters outside the framework of this agreement) even when no protocol is in force.

Most SFPAs focus on tuna and other highly migratory species. These SFPAs are known as 'tuna SFPAs'. The other SFPAs are multispecies agreements that are referred to as 'mixed' agreements. All but one of these other SFPAs has a tuna component (the exception is the agreement with Greenland, which is not located in tropical waters).

### *3.5.2 Achievements*

*Access to third-country waters*

**The number of SFPAs remained stable between 2014 and 2025**, notably in the Atlantic (Table 4). Historically, after the agreements with Senegal and Guinea-Bissau became active in 1981, the number of agreements increased steeply to 13 in 1987. Their number has since oscillated between 11 and 18, with an average of 14 active agreements in 1987-2025. The drop to 11 active agreements in 2013 was due to difficulties in approving an agreement (e.g. Micronesia and Morocco) or reaching an agreement (e.g. Gabon) or was the result of political instability in the countries concerned (e.g. Equatorial Guinea and Guinea-Bissau). There are currently 10 dormant agreements[52] (i.e. agreements with no active protocol in place – meaning that EU vessels cannot fish in these waters).

| Country | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Cape Verde | 2011-2014 | 2011-2014 | 2014-2018 | 2014-2018 | 2014-2018 | 2014-2018 | 2019-2024 | 2019-2024 | 2019-2024 | 2019-2024 | 2019-2024 | 2024-2029 |
| Comoros | 2014-2016 | 2014-2016 | 2014-2016 | 2014-2016 | | | | | | | | |
| Cook Islands | | | 2016-2020 | 2016-2020 | 2016-2020 | 2016-2020 | 2016-2020 | 2016-2021 | 2021-2024 | 2021-2024 | 2021-2024 | 2025-2032 |
| Equatorial Guinea | | | | | | | | | | | | |
| Gabon | 2013-2016 | 2013-2016 | 2013-2016 | | | | | | 2021-2026 | 2021-2026 | 2021-2026 | 2021-2026 |
| Greenland | 2013-2015 | 2013-2015 | 2013-2015 | 2016-2020 | 2016-2020 | 2016-2020 | 2016-2020 | 2016-2020 | 2021-2024 | 2021-2025 | 2021-2025 | 2024-2030 |
| Guinea-Bissau | 2014-2017 | 2014-2017 | 2014-2017 | 2014-2017 | | | 2019-2024 | 2019-2024 | 2019-2024 | 2019-2024 | 2019-2024 | 2024-2029 |
| Ivory Coast | 2013-2018 | 2013-2018 | 2013-2018 | 2013-2018 | 2013-2018 | 2018-2024 | 2018-2024 | 2018-2024 | 2018-2024 | 2018-2024 | 2018-2024 | 2025-2029 |
| Kiribati | 2012-2015 | 2012-2015 | | | | | | | | 2023-2028 | 2023-2028 | 2023-2028 |
| Liberia | | 2015-2020 | 2015-2020 | 2015-2020 | 2015-2020 | 2015-2020 | 2015-2020 | | | | | |
| Madagascar | 2013-2014 | 2013-2014 | 2015-2018 | 2015-2018 | 2015-2018 | | | | | 2023-2028 | 2023-2028 | 2023-2027 |
| Mauritania | 2012-2014 | 2012-2014 | 2012-2014 | 2015-2019 | 2015-2019 | 2015-2019 | 2015-2020 | 2015-2021 | 2021-2026 | 2021-2026 | 2021-2026 | 2021-2026 |
| Mauritius | 2014-2020 | 2014-2020 | 2014-2017 | 2014-2017 | 2017-2027 | 2017-2027 | 2017-2027 | 2017-2027 | 2022 | 2022-2026 | 2022-2026 | 2022-2026 |
| Morocco | 2013-2014 | 2013-2014 | 2014-2018 | 2014-2018 | 2014-2018 | | 2019-2023 | 2019-2023 | 2019-2023 | 2019-2023 | | |
| Mozambique | 2012-2015 | 2012-2015 | 2012-2015 | 2014-2018 | 2014-2018 | | | | | | | |
| Sao Tome Principe | 2014-2018 | 2014-2018 | 2014-2018 | 2014-2018 | 2014-2018 | 2019-2024 | 2019-2024 | 2019-2024 | 2019-2024 | 2019-2024 | 2019-2024 | 2025-2029 |
| Seychelles | 2014-2020 | 2014-2020 | 2014-2020 | 2014-2020 | 2014-2020 | 2014-2020 | 2014-2020 | 2020-2026 | 2020-2026 | 2020-2026 | 2020-2026 | 2022-2026 |
| Senegal | 2014-2019 | 2014-2019 | 2014-2019 | 2014-2019 | 2014-2019 | 2014-2019 | | 2019-2024 | 2019-2024 | 2019-2024 | 2019-2024 | |
| The Gambia | | | | | | | 2019-2025 | 2019-2025 | 2019-2025 | 2019-2025 | 2019-2025 | 2021-2025 |
| **Total** | **15** | **16** | **16** | **15** | **13** | **10** | **12** | **12** | **13** | **15** | **14** | **13** |

Table 4 – Number of SFPAs between 2014 and 2025.

[52] Gabon (ended in June 2026), Equatorial Guinea, Liberia, Micronesia (ended 2010), Morocco, Mozambique, Senegal, Seychelles (ended February 2026), Solomon Islands (ended 2012) and The Gambia.

SFPAs have significantly contributed to the EU's supply of a variety of species, but overall landings by the EU DWF have been decreasing[53]. That is the case for tuna catches (Figure 16). Catches may vary from year to year (including due to interruptions of agreements), but a period of high catches (2016-2019: 429 000 tonnes per year on average) was followed by a period of significantly lower catches (2022-2024: around 315 000 tonnes per year on average).

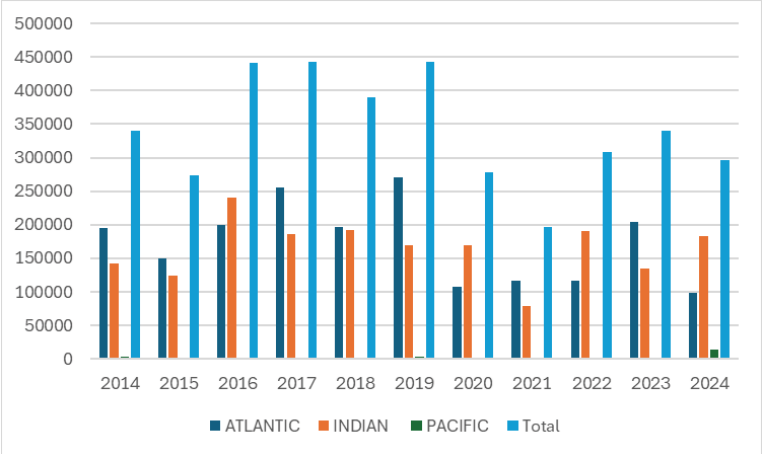



Figure 16 – Tuna catches covered by SFPAs, in tonnes (2014-2024).

*Better promoting long-term resource conservation and sustainability*

**SFPAs have promoted conservation and management measures that are aligned with the CFP**, as well as with the international rules (for example those stemming from RFMOs)[54]. SFPAs have targeted surplus resources that have been determined using the best scientific advice available (or, for migratory species, following the relevant RFMO management measures). In addition, the constructive dialogues built through SFPAs have benefited the relationship in other forums (particularly RFMOs), thus further promoting the regional sustainability of fisheries.

**Consistency has been ensured between the fight against IUU fishing and the SFPAs.** SFPAs have supported the implementation of the IUU Regulation by building up the capacity of partners' authorities. They have also consistently reinforced the zero-tolerance approach by refraining from negotiating SFPAs with countries that have not tackled their shortcomings under the IUU pre-notification procedures[55].

*Reinforcing the governance of bilateral fisheries agreements*

The CFP Regulation states that SFPAs must contain a provision on **respect for democratic principles and human rights**. This is an essential element of such agreements and an essential element governing the EU external relations overall. This provision is included in all protocols to the fisheries agreements.

The **social provision** governs the employment conditions of third-country fishers onboard EU vessels fishing in the framework of SFPAs. Originally, this clause mainly focused on the obligation for EU vessels to employ third-country fishers. Step-by-step evolutions have been visible down the years[56].

Since 2015, almost all SFPAs have contained a **transparency clause** which, depending on the SFPA, requires partner countries either to make public the agreements authorising non-EU foreign fleets in their national waters or to inform the EU about them via the Joint Committee.

53 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 62.
54 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 70.
55 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 70.
56 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 54.



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Efforts have been made to increase SFPAs' **efficiency**[57]. These have consisted in adapting fishing opportunities to the level of their use by the EU fleet and to conservation objectives. The EU generally succeeded in making the access fees paid by shipowners reflecting the market price and in achieving effective catches and profits. Since 2021, a relative increase of the share of operators' fees in the total contribution for access has been observable in the new protocols that have been signed.

The two components of the EU's public contribution – access fees and sectoral support – have been **clearly dissociated and specifically directed towards building better governance** in partner countries. The sectoral support contribution is paid on the basis of the results of implementing agreed programmes for developing the sector in partner countries. Overall, the EU contribution is generally aligned with the absorption capacity of partner countries and measures have been taken to ensure the respect of time limits in sectoral support spending.

*More effective support for sustainable fisheries in partner countries*

In 2014-2025, **the EU's funding to SFPAs amounted to EUR 1 355 billion**, averaging about EUR 113 million per year. It constantly increased between 2014 and 2022 (from EUR 69.3 million in 2014 to EUR 153.6 million in 2022) but then fell back significantly. Five recipient countries (Mauritania, Morocco, Greenland, Guinea-Bissau and Seychelles) received 93.6% of the EU funding to SFPAs in 2014-2025 (Figure 17).

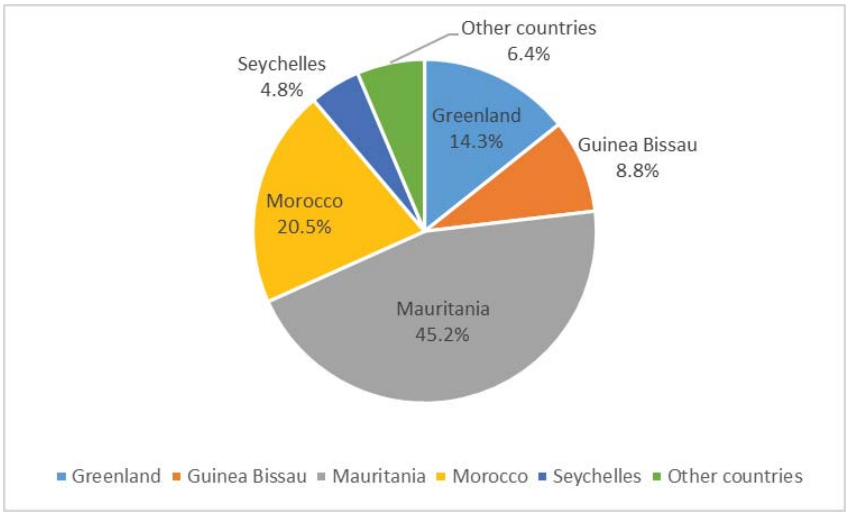



Figure 17 – Average annual contribution from the EU budget to active SFPAs, 2014-2025.

**Sectoral support is now recognised as making a strong contribution** to the reinforcement of third countries' capacities in fisheries management, MCS systems, scientific analysis, support to small-scale fisheries and the development of a sustainable blue economy.

The EU's financial contribution for the access component of the SFPAs had a **positive cost-benefit ratio** that was generally higher for tuna than for multispecies SFPAs[58].

**Economic value added** was generated by the fishing activities of the EU's fishing vessels (direct value added) and by their interactions with the upstream (e.g. supply of goods and services to vessels) and downstream (e.g. processing and commercialisation of catches) ancillary industries (indirect value added)[59].

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57 Evaluation and analysis of the Sustainable Fisheries Partnership Agreements between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs, 2023; Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 74.

58 Evaluation and analysis of the Sustainable Fisheries Partnership Agreements between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs, 2023.

59 ibid.

It is estimated that SFPAs created direct **employment** for an annual average of almost 2 850 third-country nationals. It is also estimated that indirect employment has supported an additional annual average of almost 15 000 jobs in third countries (mostly in industrial tuna processing plants)[60].

**The partner countries lead the programming process** and submit a proposal to joint committees. This makes it possible to better align the multiannual programme with national sectoral policies and strategies.

## 3.6 Bilateral and multilateral agreements on stocks of common interest shared with adjacent non-EU countries in the Northeast Atlantic

### *3.6.1 Introduction*

Fisheries cooperation in the Northeast Atlantic takes place bilaterally, trilaterally for shared stocks in the greater North Sea, and multilaterally for widely distributed pelagic stocks, under coastal state consultations and within RFMOs (NEAFC and ICCAT) for highly migratory species (swordfish, blue fin tuna, tropical tuna and albacore).

Most **bilateral agreements** are longstanding. The 1980 Fisheries Agreement is the backbone of **EU-Norway cooperation**[61]. It incorporates elements linked to the EEA agreement[62], which excludes fisheries and agriculture. This agreement has allowed constructive and mutually beneficial cooperation for over four decades. In July 2020, Norway announced its intention to terminate the agreement. The EU and Norway agreed to replace it with a new agreement by 1 January 2023. However, that deadline has not been met and the 1980 agreement continues to apply pending its renegotiation.

Besides the 1980 agreement, the EU and Norway concluded in 2014 an agreement on fishing in the Skagerrak[63]. This guarantees reciprocal access to waters for vessels flying the flag of Denmark, Norway or Sweden. The EU also consults Norway on behalf of Sweden to agree fishing opportunities for Sweden in the Norwegian zone of the North Sea. This continues the practice established by the 1976 fisheries agreement between Norway and Sweden that predated Sweden's accession to the EU.

Overall, the EU and Norway carry out three consultations annually (under the bilateral, the Skagerrak and Kattegat, and the EU (Sweden)-Norway neighbouring agreements). These bilateral agreements were the EU's most important fisheries agreements with a third country until Brexit.

The seas around **Iceland** have historically been an important fishing ground for EU fishers. When Iceland declared its EEZ in 1976, it largely excluded foreign vessels. An EU-Iceland fisheries agreement was concluded in 1993, allowing reciprocal access and quota exchanges that were implemented through annual arrangements. The agreement was initially valid for 10 years and was then extended for a further 6 years (until 2009) before becoming dormant. Discussions resumed in 2025 and are still ongoing. In parallel, the EU and Iceland signed, on 15 July 2025, a memorandum of understanding (MoU) on enhancing cooperation on fisheries and other ocean matters[64]. The MoU establishes a framework for deeper and broader

60 ibid.

61 Council Regulation (EEC) No 2214/80 of 27 June 1980 on the conclusion of the Agreement on fisheries between the European Economic Community and the Kingdom of Norway.

62 Agreement on the European Economic Area – Final Act.

63 Agreement between the European Union and the Kingdom of Norway on reciprocal access to fishing in the Skagerrak for vessels flying the flag of Denmark, Norway and Sweden.

64 EU – Iceland Memorandum of Understanding (MoU) on enhancing cooperation on fisheries and other ocean matters.

cooperation between the EU and Iceland on sustainable fisheries, Arctic matters, scientific research, the sustainable blue economy and marine conservation.

The **Faroe Islands** and **Greenland**, which are both part of the Kingdom of Denmark but not the EU, have their own fisheries relations with the EU. An EU-Faroe Islands fisheries agreement was concluded in 1980. However, there have been no new annual agreements since 2021 on access to waters or exchange of fishing quotas. The EU and the Faroe Islands signed an MoU in April 2024 on enhanced cooperation on a wide range of policy matters, including sustainable fisheries management[65]. The EU has an SPFA with Greenland that allows the EU fleet and also, after quota exchanges, third-country fleets to fish in Greenlandic waters. This agreement is one of the abovementioned SFPAs.

Since the **UK** withdrew from the EU, fisheries relations with the UK have been governed by the **Trade and Cooperation Agreement (TCA)**[66].

**Trilateral fisheries relations with UK and Norway** cover seven commercially important stocks in the greater North Sea (cod, haddock, saithe, sprat, whiting, plaice and herring), for which each party's fleet can fish part of its quota in another party's waters. There are 20 TACs of high economic value, covering around one third of the total volume of fishing opportunities in the Northeast Atlantic. The trilateral forum is closely integrated into the network of established bilateral frameworks (EU-UK and EU-Norway) and ensures coherence between the processes.

**Coastal states consultations** are informal meetings focusing on joint management of the most important widely distributed Northeast Atlantic pelagic stocks (particularly mackerel, blue whiting and Atlanto-Scandian herring). They involve the EU, the Faroe Islands, Greenland, Iceland, Norway, Russia and the UK (although with exceptions since Russia started its war of aggression on Ukraine), and cover management and conservation measures.

**NEAFC** deals with demersal and widely distributed pelagic stocks in the Northeast Atlantic. The Contracting Parties are Denmark (with respect to the Faroe Islands and Greenland), the EU, Iceland, Norway, Russia and the UK. Unlike the coastal states' consultations, the NEAFC Convention establishes procedures to adopt legally binding recommendations for managing the stocks under its jurisdiction. These recommendations are applicable to the jurisdictional waters of a Party when it has endorsed them. ICES provides scientific advice to NEAFC. EU fisheries in NEAFC high seas are limited and consist mainly of shrimp fisheries in the Barents Sea. The Faroe Islands, Iceland, Norway and especially Russia have important catches of pelagic stocks. Russia also fishes for pelagic redfish stocks in the Irminger Sea (despite the fishing ban on these stocks, which Russia has objected to) and for snow crab in the Loophole.

### *3.6.2 Achievements*

**Brexit was successfully managed through the TCA**, which entered into force on 1 May 2021. This is an unprecedented international agreement that provides a comprehensive and ambitious basis for the relationship between the EU and the UK across many policy areas. Its Heading V establishes the framework for the EU-UK relationship in fisheries and commits both Parties to upholding the CFP objectives and principles - particularly the long-term sustainability and optimum utilisation of shared stocks on the basis of the best available scientific advice.

The TCA outlines the procedures for setting TACs and quotas and establishes cooperation on fisheries management through the Specialised Committee on Fisheries (SCF). Since 2021, the EU has concluded 6 annual consultations and 10 in-year consultations with the UK on the TACs

65 EU – Faroe Islands Memorandum of Understanding on Enhanced Cooperation.
66 EU – UK Trade and Cooperation Agreement.

listed under Annexes 35 and 36 of the TCA. By 10 December each year, the EU and the UK need to agree on the TACs for the following year.

In the TCA, the EU and UK agreed the reciprocal EU-UK access arrangements until 30 June 2026. These consisted in gradually transferring 25% of the overall value of the existing EU-27 quota in UK waters to the UK over a period of five and a half years, after which shares would be fixed at 2025 levels. Before Brexit, reciprocal access to waters was estimated to cumulatively amount to 959 137 tonnes in 2018, worth nearly EUR 761 million in total, for the EU and the UK. The reduction of the EU quota attributable to the TCA was estimated at 73 697 tonnes in 2021 and 122 893 tonnes in 2025[67]. It is estimated[68] that until 2023, Ireland, France and the Netherlands transferred the most in terms of the value of EU fishing quotas to the UK. Most of the total reduction in EU fishing quota shares concerned a limited number of stocks, impacting different Member States differently. 60% of the EU quota reduction took place in 2021. The cumulative reductions totalled 70% in 2022, 80% in 2023 and 92% in 2024. The Brexit Adjustment Reserve Fund of EUR 5.4 billion was put in place to help Member States address the negative consequences of the UK's withdrawal from the EU.

Access to the waters of the British Crown Dependencies Guernsey and Jersey is governed by a dedicated agreement that was formalised by an exchange of letters at ministerial level in January 2023. Access is limited to French vessels that have demonstrated activity in these waters during the reference period 2017-2020, with provisions for replacement vessels. In 2026, 41 EU vessels held an authorisation to fish in Guernsey and 130 in Jersey. Whelk-potting, lobster-potting and scallop-dredging were the most important fisheries.

Predictable access to external waters for fishing is crucial for EU fishers. In June 2025, the EU and the UK adopted Decision 1/2025 of the Partnership Council as well as Decision 1/2025 of the SCF, granting full reciprocal fishing access to waters for an additional period of 12 years, until 30 June 2038. This new agreement provides legal certainty and long-term stability for full access to each other's EEZs, covering both quota-managed and non-quota fish stocks.

The TCA requires both Parties to take due account of each other's rights and interests when adopting measures in their own waters. In this context, the EU and the UK liaise closely on points ranging from fisheries management to the designation of marine protected areas. Regulatory autonomy can increase divergence between the Parties, but the TCA provides a structured framework for cooperation. Since its inception, the SCF has delivered on a wide range of joint commitments (e.g. guidelines for notifications of unilateral measures), thus helping to structure EU-UK relations on fisheries. Overall, the SCF provides a forum where the EU and the UK cooperate throughout the year to address shared challenges and develop joint management approaches. This has undoubtedly helped to reach conclusions on challenging and politically sensitive issues.

The TCA also provides a structured framework for resolving disputes between the Parties, such as the UK ban on fishing for sand eels in UK waters in the North Sea and in all Scottish waters. This case clarified that management measures adopted by the Parties must comply with the agreed conditions, respect the rights and obligations set out in the Agreement and take due account of their impact on the other Party. It demonstrated that the dispute resolution mechanism established under the TCA functions effectively. It also set an important precedent for managing future disputes under the TCA.

**Cooperation has delivered sustainable management of shared stocks in the Northeast Atlantic since 2013**, with a reduction in overall fishing mortality; faster progress in reducing

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67 Landings by the EU Member States from the UK EEZ and by the United Kingdom from the EU-27 and UK EEZs, Joint Research Centre, European Commission, 2021.

68 Brexit and the reduction in EU fishing quota shares, 2021-2023, European Parliament Research Service, 2022.

fishing pressure in EU waters than in non-EU waters; and a general increase in stock biomass in both EU and non-EU waters in 2003-2023[69]. In cases where TACs are not set in line with the ICES advice, the EU collaborates closely with third countries. This includes exploring alternative management approaches and technical measures aimed at rebuilding stocks, in line with the principles of the CFP.

The EU also continuously enhances its evidence base through targeted research and close collaboration with third countries and Member States' research institutes. Additional expert reports undertaken within the framework of the SCF support science-based management decisions. The EU also maintains a strong working relationship with ICES, with close involvement at annual meetings between ICES and advice-requesters. Under the SCF, the EU works with the UK to develop ICES roadmaps to improve ICES's stock assessments and to submit joint requests to ICES for advice.

In the context of NEAFC and coastal states consultations, the EU has promoted the adoption of measures to curb unsustainable fishing by Russia, such as control measures for Irminger redfish pelagic stocks (in place since 2023) and mackerel in 2026 (aiming at avoiding another Contracting Party providing logistic services for such unsustainable fishing). The EU has also supported and led efforts on control measures for pelagic stocks, leading to the conclusion of a set of measures endorsed in 2022 by all Parties except Russia.

## 3.7 Authorisation, control, monitoring and enforcement on the EU external fleet

The EU is committed to upholding its UNCLOS obligations regarding flag state responsibilities and ensuring that its international commitments are transposed into EU law and implemented by EU Member States and EU operators. To that end, several pieces of EU legislation apply to the EU external fleet, together with the principles enshrined in the CFP Regulation. They have represented important steps towards regulating the EU external fleet in accordance with EU and international rules.

### *3.7.1 Authorisations of vessels fishing in external waters*

In 2006, the United Nations General Assembly adopted a resolution to protect **vulnerable marine ecosystems (VMEs)** from bottom fishing in the high seas. The EU was one of the first to follow this up in 2008 by adopting a regulation on the protection of VMEs in the high seas from the adverse impacts of bottom-fishing gears[70]. Fishing vessels registered in an EU Member State must obtain an authorisation to operate in a defined area prior to starting their fishing activities. The use of bottom-fishing gears is prohibited in areas where no proper scientific assessment has been carried out and made available. This applies to EU fishing vessels carrying out fishing activities with bottom-fishing gears in the high seas outside areas covered by RFMOs. The VME Regulation was a pioneering instrument because it established legally binding rules for the protection of VMEs in the high seas and has inspired the development of similar policies in other regional organisations.

The VME Regulation has to a certain extent achieved its objective of protecting VMEs by regulating bottom-fishing practices and defining a common legal framework and set of guidelines for Member States[71]. However, the restriction of its application to EU Member States has limited the desired effects. Over the years, it has seemed to be relevant for only a small number of Member States. The activity of non-EU fleets in the geographical area of the VME Regulation calls its positive impacts into question. There is some overlap between the VME

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69 More detail in Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), pp. 25-29 and Annex VI Table 9, Figures 14 and 15, Tables 9-13.

70 Council Regulation (EC) No 734/2008 of 15 July 2008 on the protection of vulnerable marine ecosystems in the high seas from the adverse impacts of bottom fishing gears.

71 Evaluation of Council Regulation No 734/2008 on the protection of vulnerable marine ecosystems in the high seas from the adverse impacts of bottom fishing gears, SWD(2025) 5 final.



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Regulation and other EU legislation dealing with rules and processes for the management of the external fishing fleets. In addition, the technical nature of the topic and the small and distant geographical area concerned lead to difficulties in collecting sound information and engaging with involved stakeholders.

**The SMEFF Regulation**[72] was an important step for four reasons. First, all external fishing activities of EU vessels (whether under a bilateral agreement or an RFMO, or not) must be authorised by the relevant EU flag Member State under predefined conditions. Second, all vessels must be monitored constantly to check that they follow EU control rules and the authorisation conditions continue to be met. Third, the Commission was required to set up a database that makes public all authorisations granted for EU vessels fishing outside EU waters and for non-EU vessels fishing in EU waters. This represents a major step toward more transparency in the EU's external action and under the CFP in general. Fourth, to prevent abusive reflagging, there are strict conditions for EU vessels which leave the EU fishing fleet and later return during the five years preceding the application for a fishing authorisation.

An evaluation of the implementation of the SMEFF Regulation is being carried out to assess the extent to which its objectives have been achieved. The evaluation is examining the implementation of sustainability requirements for the external fleet in the procedure for authorisations of EU vessels and third-country vessels in EU waters. Outside the management of an RFMO, the possibility of having at least one sustainability indicator remains a big challenge[73]. The direct authorisations very often concern areas and stocks for which there is chronically poor data (particularly in western and central Africa) or which are not managed at all (FAO 41 area). The evaluation is also reviewing how transparency and governance have improved. It is particularly assessing beneficial owner data collection and how it has been carried out by the Member States and the Commission.

### *3.7.2 EU fisheries control and monitoring rules in non-EU waters*

**EU rules on control and monitoring of fishing vessels**[74] **apply equally to EU vessels operating within EU waters and beyond.** Member States must control the activities outside EU waters carried out by fishing vessels flying their flag and by their nationals. Member States must also operate VMS for the effective monitoring of position and movement of fishing vessels flying their flag, wherever those vessels may be. If an EU fishing vessel engages in fishing activities in the waters of a third country or in waters where the fishing resources are managed by an RFMO and if the agreement with that third country or the applicable rules of that organisation so provide, VMS data must also be made available to that country or organisation. The fisheries monitoring centre of each Member State must therefore monitor the fishing vessels flying its flag in whichever waters they are operating and in whichever port they are.

The master of each EU catching vessel must keep an electronic fishing logbook that records fishing activities and must submit it electronically to the competent authority of its flag Member State, regardless of where the fishing activity takes place. Before the 15th day of each month, each Member State must submit aggregated data on catches and fishing effort, including outside EU waters, by electronic means to the Commission or to a body that it has designated.

The use of the UN/FLUX standard has been mandatory for the transmission of VMS and electronic logbooks data in the EU since 2015. The United Nations Centre for Trade Facilitation

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72 Regulation (EU) 2017/2403 of the European Parliament and of the Council of 12 December 2017 on the sustainable management of external fishing fleets, and repealing Council Regulation (EC) No 1006/2008.

73 Study on Scientific knowledge of the EU-fisheries in high seas, European Commission, 2025.

74 Regulation (EU) 2023/2842 of the European Parliament and of the Council of 22 November 2023.

and Electronic Business (UN/CEFACT) created this standard for exchanging fisheries data between stakeholders in 2013 at the initiative of the Commission. It supports the real-time sharing of electronic fisheries data to trace fish from catch to sale; improves data quality and control; and makes data-sharing more cost-efficient by allowing countries' fisheries monitoring centres to use one single unified format for sharing fisheries data.

**The Commission has promoted the use of the UN/FLUX standard at international level.** Since 2023, the UN/FLUX standard has been used for sharing VMS data between the EU and Norway. Following Brexit, the EU and UK continue to use this standard for sharing VMS and electronic logbook data; and the EU, Norway and the UK work trilaterally to agree on the exchange of vessels, authorisations and fishing activities data in UN/FLUX format.

Competing international standards continue to exist (particularly in the Western and Central Pacific), but the use of the UN/FLUX standard has been extended to RFMOs. The Contracting Parties of NEAFC agreed in 2018 to move to the UN/FLUX standard for the exchange of vessel position and electronic logbook data by January 2026. In 2024, the GFCM successfully concluded a pilot project for the sharing of VMS and electronic logbook data. The IOTC launched a pilot project for the sharing of VMS data in 2025. SIOFA is currently installing a VMS system that will support exchanges in UN/FLUX format. The obligation for the EU fleet to use the UN/FLUX format is now a standard provision proposed in all SFPAs' protocols. However, the SFPA partner countries' lack of technical capacity and resources is hampering progress in implementing UN/FLUX and data exchanges still rely on old standards.

### 3.8 Coherence with other policies

The 2011 Commission communication on the CFP's external dimension paid particular attention to enhancing the coherence with other EU policies. It stressed the relevance of development, environment and trade policies for making further progress in sustainable and responsible governance of fisheries worldwide. Over the years, not only have the interactions of these policies with EU fisheries international action increased but other policy fields have been contributing to this objective[75].

**The EU's cooperation policy has increasingly supported the development of fisheries and aquaculture.** Indeed, the fisheries and aquaculture value chain is central to ensuring the livelihoods of a substantial proportion of the world's population[76].

The EU's cooperation with the African, Caribbean and Pacific (ACP) states underwent significant developments with the adoption of the Samoa Agreement, which the EU signed with the Organisation of ACP States (OACPS) on 15 November 2023. This agreement promotes dialogue and cooperation on all aspects of ocean governance (including fisheries). This is replicated in the three regional protocols (Africa, the Caribbean and the Pacific).

These developments have been reflected in the EU cooperation programmes. They give a much stronger place than in the past to the sustainable blue economy, including fisheries and aquaculture. Between 2014 and 2025, an estimated EUR 1.9 billion was contracted to promoting better ocean governance, the sustainable development of the blue economy, and marine conservation and restoration in partner countries. This included EUR 746.49 million in the fisheries and aquaculture portfolio – of which EUR 555 million (74%) toward ACP and North Africa countries - and was implemented through national, regional and global

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75 This section builds on and expands Section 4.1.3 (Coherence) in the evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final).

76 According to the FAO, aquatic animal foods contributed 15% of animal protein availability globally and provided at least 20 % of animal protein availability for over 40% of the world's population in 2023. Source: The State of World Fisheries and Aquaculture 2026, p. vi.

programmes around the world. These programmes covered marine and inland capture fisheries and aquaculture.

During this same period, the EU funded 119 initiatives (80 in ACP and North African countries) at national level for a total of EUR 499.7 million. Countries such as Cambodia, Liberia and Somalia chose fisheries and/or aquaculture as focal sectors for bilateral cooperation. They received support for the development of their national fisheries and aquaculture policies; fish value chains and sustainable aquatic food systems; the fight against IUU fishing; upgrading of fisheries monitoring and control capacities; as well as research, data collection and science-based management. Special attention and support were provided to small island developing states (SIDS), including for civil society, gender inclusion and awareness-raising.

Many issues linked to fisheries are transboundary, so a large proportion of EU programmes were regional. Between 2014 and 2025, 38 regional programmes (all in ACP and North African countries, but one) were launched to support countries and regional organisations in addressing the ocean with an integrated approach. 8 of these programmes (3 for 2014-2020, 5 for 2021-2024) aimed at improving the management of shared stocks through data collection, scientific advice, capacity reinforcement in the fight against IUU fishing (including through technical support from the European Fisheries Control Agency (EFCA)), development of management plans and support for regional fisheries bodies in West Africa, the Indian Ocean and the Pacific. They were launched during the 2014-2020 financial period. They were all renewed during the 2021-2027 period and recognise the importance of partnerships and the need to mobilise additional and sustainable ocean finance, in line with the Global Gateway Strategy (the EU's external investment strategy).

Dedicated programmes have complemented and supported this by paying increasing attention to ocean matters in EU-OACPS cooperation. Building on the achievements of FISH4ACP (2020-2025, EUR 40 million), the New Aquatic Food Value Chains (NAVAC) programme (launched in 2025, EUR 20 million) aims at improving access to nutritious aquatic foods and boosting local economies through innovation and sustainable value chain development. It includes a dedicated knowledge hub to identify scalable aquatic food value chains and help unlock sustainable investments in the blue economy at country level.

Cooperation at global level was also supported (EUR 72.2 million), to enhance capacities and involvement of developing countries in conservation and sustainable use of aquatic resources and biodiversity, including in areas beyond national jurisdiction through the Global Ocean Programme (EUR 40 million).

**EU environment policy is mainstreamed into international fisheries action.** The EU has, as a key player in both RFMOs and multilateral environmental agreements (MEAs), been promoting cooperation and synergies between these international bodies within the framework of their respective mandates[77]. Synergies between RFMOs and regional seas conventions (RSCs) have been promoted. The EU has supported commitments under the UN Convention on Biological Diversity (CBD) and the Kunming-Montreal Global Biodiversity Framework (GBF), in particular the '30x30' target (protecting 30% of marine areas by 2030) through the adoption of measures for the protection of vulnerable marine ecosystems in many RFMOs and the continuing efforts to establish marine protected areas (MPAs). With the EU's support in many cases, RFMOs have progressed in implementing an ecosystem approach, based on the scientific integration of ecosystem level information, albeit in different ways and at different paces[78].

Sharks illustrate this trend. Progress (especially in RFMOs) in species-specific data collection and reporting has significantly improved scientific research, bycatch mitigation and stock

[77] For more detail, see Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 78.
[78] For more detail, see Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 58.



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assessments for several shark species. The International Plan of Action for the Conservation and Management of Sharks (IPOA-Sharks) developed by the FAO has fostered international cooperation. The greatest advances have been observed in areas that lie outside national jurisdiction in fisheries managed by RFMOs and nations with strong monitoring systems[79]. Through the Global Ocean Programme, the EU is providing support for filling in gaps in the mapping of important areas for migratory marine species like sharks, rays, marine mammals, turtles and marine birds.

MEAs such as the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) and the Convention on the Conservation of Migratory Species of Wild Animals (CMS) aim at strengthening protection for endangered species, including aquatic species. The proportion of aquatic species proposed under CITES has been rising sharply – from 8% of all animal listings at CoP18 in 2019 to 14% at CoP19 in 2022 and over at CoP20 in 2025, where 78 of these species were added to the appendices (32 to Appendix I and 46 to Appendix II). In particular, all sawfish (*Pristidae*) are listed in CITES Appendix I, while 119 shark species were protected under CITES as of 2025. In recent years, proposals have relied more heavily on precautionary considerations and have included many species on the basis of their similarity to other species of concern. Since becoming a Party to CITES in 2015, the EU has played an active role in strengthening the international protection of aquatic species, including by submitting and co-sponsoring proposals for the listing of commercially exploited aquatic species, notably sharks, and by supporting their effective implementation and enforcement.

Regarding marine pollution, reaching a global, legally binding agreement on plastics (including in the marine environment) remains a high priority for the EU and its Member States. In line with this commitment, the EU has actively supported the adoption of provisions to reduce marine litter and plastics in several RFMOs, such as the IOTC, the WCPFC and the Commission for the Conservation of Antarctic Marine Living Resources (CCAMLR). In the Mediterranean, the GFCM 2030 Strategy, for which the EU was the driving force, identifies as one of its expected outcomes the minimisation and mitigation of any form of pollution caused by the activities of the fishing sector (particularly abandoned, lost or otherwise discarded fishing gear). The Commission is also stepping up its commitment to reduce marine litter at international level, including in the UN, G7, G20 and other international forums. To that end, it is promoting cooperation with RSCs.

The EU is also advocating at the International Maritime Organisation (IMO) for underwater noise-reduction measures (including from fishing vessels) and is, through its Horizon Europe programme, funding significant research on underwater noise impacts (including on fish behaviour).

The EU is actively promoting work to integrate **climate change** considerations into fisheries scientific advice and management policies in RFMOs. In CCAMLR, the EU is proposing to designate two new marine protected areas in the Southern Ocean (in East Antarctica and in the Weddell Sea) that would increase marine resilience to climate change. Within the framework of the GFCM 2030 Strategy, the EU expects that the work on climate change and non-indigenous species will be consolidated, improving initial assessments of these threats and their potential impacts on fisheries, reinforcing monitoring programmes and integrating adaptive measures into management plans.

**Synergies between the CFP and the EU trade policy have been strengthened.** At the multilateral level, the WTO Agreement on Fisheries Subsidies was accepted by the EU and entered into force on 15 September 2025. The Agreement prohibits harmful subsidies that contribute to overfished stocks, IUU fishing and fishing in the unregulated high seas. It

79 Review of the state of world marine fishery resources – 2025, FAO, p. 33.



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complements efforts to achieve the CFP's objectives by strengthening multilateral trade rules against global drivers of overexploitation.

Most bilateral FTAs between the EU and third countries that have been negotiated over the last 15 years include chapters on trade and sustainable development. They systematically cover fisheries and, in the more recent FTAs, aquaculture – particularly commitments regarding respect for international conventions related to fisheries, the fight against IUU fishing, cooperation in the framework of the RMFOs and promotion of sustainable aquaculture.

The current EU GSP makes preferences conditional to the respect of 27 international UN and ILO conventions related to human rights, labour rights, environment, and good governance. The list of conventions has been extended to 32 conventions under the new GSP[80] which will apply as from January 2027 and will be applicable to all GSP beneficiaries across the three GSP arrangements: standard GSP, GSP+ and Everything but Arms (EBA).

The Forced Labour Regulation[81], which will start applying in December 2027, requires the Commission and Member States to investigate products – including fishery products – that are suspected of having been made with forced labour. Where evidence of forced labour is found, the products concerned will be banned from the EU market. Tools developed by the Commission (including guidelines[82] and a database on forced labour risks in specific geographic areas and products) will assist competent authorities and economic operators in implementing the Regulation.

The compulsory use of CATCH will make risk-based import controls more effective and less burdensome. Appropriate interoperability with IT systems for customs and sanitary checks is planned and will better protect the EU market both from fishery products stemming from IUU fishing and from possible fraud.

Regulation (EU) 1026/2012 empowers the Commission to adopt restrictive measures against third countries that permit unsustainable fishing practices, thereby ensuring the long-term conservation of fish stocks that are of common interest to the EU and third countries. Following its revision in 2025[83], the framework now provides greater clarity on the conditions that trigger EU measures (including trade measures), while simultaneously facilitating more constructive engagement with third countries.

**EU market rules apply also to imports.** The common organisation of the market (CMO) in FAPs[84] aims to help achieve the CFP's objectives by ensuring fair competition between all products marketed in the EU. It also aims to promote more sustainable consumption habits by providing consumer information that complements the general EU food labelling rules. The Commission issued a report on the results of the implementation of the CMO Regulation on 21 February 2023[85]. Rules on information to consumers are complemented and supported by traceability rules established under the Control Regulation. The new digital traceability obligations under the revised fisheries Control Regulation, which are due to be implemented in the coming years, will apply equally to EU-produced and imported products.

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80 Regulation (EU) 2026/1395 of the European Parliament and of the Council of 17 June 2026 on applying a generalised scheme of tariff preferences and repealing Regulation (EU) No 978/2012.

81 Regulation (EU) 2024/3015 of the European Parliament and of the Council of 27 November 2024 on prohibiting products made with forced labour on the Union market and amending Directive (EU) 2019/1937.

82 C(2026) 4386 final.

83 Regulation (EU) 2025/2077 of the European Parliament and of the Council of 8 October 2025 amending Regulation (EU) No 1026/2012 on certain measures for the purpose of the conservation of fish stocks in relation to countries allowing non-sustainable fishing.

84 Regulation (EU) No 1169/2011 of the European Parliament and of the Council of 25 October 2011 on the provision of food information to consumers.

85 COM(2023) 101 final.



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**Labour issues in distant-water fisheries have received increasing attention** because of concerns about unsafe working conditions, forced labour and other human rights abuses. The EU has been working to address this on several levels, in addition to the above-mentioned Forced Labour Regulation. Under the CFP, the EU uses the SFPAs to promote social standards and decent work where appropriate (see above). RFMOs can also play a role in addressing these issues, because they oversee fishing activities in vast international waters. The EU has therefore supported the integration of the International Labour Organization's (ILO) Work in Fishing Convention No 188 into several RFMOs (e.g. ICCAT and the WCPFC) and has launched concrete reflections on the subject in others (e.g. the IOTC).

More broadly, the EU promotes existing international standards for working conditions and labour rights - specifically, the ratification and effective implementation of the ILO Work in Fishing Convention No 188 and other relevant international standards. In particular, the 2012 Cape Town Agreement under the IMO aims to enhance the regulation of fishing vessel safety through coordinated action by flag, port and coastal states. Its implementation is expected to support efforts against IUU fishing and forced labour. The Agreement establishes minimum global standards for the design, construction and equipment of fishing vessels of 24 metres or longer (or equivalent in gross tonnage) and mandatory inspections to ensure compliance. Once it is in force in February 2027, the Agreement will authorise port states to conduct safety inspections of foreign vessels.

The Commission Communication on decent work worldwide[86] reinforces the EU strategy on promoting decent work at global level, identifying key instruments throughout EU policies. The EU has played a pivotal role in reducing fatalities in the fishing sector and serious incidents while simultaneously improving working and employment conditions across the sector. Key achievements include: combating exploitation in recruitment to diminish instances of forced labour and child labour globally; tackling self-employment abuses and ensuring fairer labour contracts; banning placing on the EU market as well as exporting from the EU market the fish products linked to forced labour ; ensuring that all EU-flagged vessels comply with decent working and living conditions; safeguarding the well-being of fishers on board vessels; and strengthening institutional capacity by supporting training programmes (including joint training initiatives to ensure high-standard inspections and uphold fair working and living conditions for fishers).

**The EU's research and innovation policy is increasingly supporting international cooperation in marine science and knowledge**, including fisheries, through its framework programmes for research and innovation (currently Horizon Europe). The EU Global Approach to Research and Innovation[87], which was launched in 2021, facilitates global partnerships to manage shared ocean resources, monitor ecosystems and share best practices, recognising that marine ecosystems are connected by currents and migrating species.

Between 2014 and 2026, under Horizon 2020 and Horizon Europe, 16 fisheries-relevant projects that involve non-associated third countries were funded with a total EU contribution of around EUR 80 million. Most counties with which the EU has SFPAs are also eligible for such funding. For example, the FarFish project[88] was fully dedicated to fisheries outside the EU and included case studies in Cabo Verde, Mauritania, Senegal and the Seychelles as well as in high seas in the South Atlantic Ocean. Several projects relate to the implementation of fisheries MCS. If one adds fisheries-relevant projects that include associated countries (e.g. Iceland and Norway), the total number of projects that include non-EU countries reaches 43 with a total EU contribution of around EUR 207 million. Moreover, the All-Atlantic Ocean Research and

86 COM(2022) 66 final.

87 COM(2021) 252 final.

88 Responsive Results-Based Management and capacity-building for EU Sustainable Fisheries Partnership Agreement and international waters.

Innovation Alliance (AAORIA)[89], which was launched in 2022, unites countries along the Atlantic Ocean to strengthen marine research, innovation and cooperation. One of its objectives is to develop innovative, outcome-oriented science to support sustainable fisheries and aquaculture.

Horizon Europe's mission-based approach is a major innovation. This includes the EU Mission to Restore our Ocean and Waters by 2030. The Mission focuses on EU seas and waters, but it has, through its Charter, brought together relevant actions from all continents, including from coastal states in Africa and Asia[90].

The EU Ocean Pact[91] foresees a Research and Innovation Strategy that will include priorities that are relevant for fisheries and has already led to the adoption of an ambitious agenda on ocean observation, OceanEye[92].

**Regional strategies/approaches have emerged** in the EU's relations with some regions in fisheries and beyond. **Mediterranean regional cooperation** in fisheries is crucial because most fish stocks are shared with third countries and 20 states interact in the Mediterranean environment. Moreover, some countries share common stocks in narrow sea areas (e.g. the Strait of Sicily and the Alboran, Aegean and Levantine Seas) in a fragile and challenging geopolitical context that also defines fisheries relations between countries. The Mediterranean is now prominent following the adoption of the Pact for the Mediterranean[93]. This provides a framework for regional cooperation with third countries, allowing the EU to enhance the added value of its significant financial support via various EU instruments. Under its Blue Mediterranean Health and Wealth objectives, the Pact foresees actions to enhance regional fisheries governance, combat IUU fishing and support traditional fisheries by building on the work of GFCM and ICCAT (the two RFMOs governing fisheries in the area). As the Pact also announces, the EU and Southern Mediterranean countries are engaged in a process to renew and enhance their commitment for sustainable fisheries. This should lead to the adoption of a new 'MedFish4ever' ministerial declaration in 2027.

The EU's strategic approach to the **Black Sea region** (the Black Sea Strategy) was adopted in May 2025[94]. It builds on the 2019 Common Maritime Agenda[95] (CMA) for the Black Sea, and particularly on its actions on sustainable fisheries and aquaculture. Thanks to the CMA, the blue economy has made tangible progress in the region, particularly in marine pollution management, entrepreneurship, coastal tourism, innovation and environmental protection [96]. Sustainable fisheries and aquaculture in the Black Sea will remain a key area of shared interest.

The EU updated its **Arctic policy** in 2021[97], focusing on a safe, stable and peaceful Arctic; addressing the impacts of climate change; and promoting international cooperation and sustainable and inclusive development. The Arctic policy places particular emphasis on the Arctic regions of Denmark, Finland and Sweden, but the EU has also supported wider Arctic cooperation and governance efforts notably through its engagement with the Arctic Council.

The highlight of the Arctic policy was the Agreement to Prevent Unregulated High Seas Fisheries in the Central Arctic Ocean (also known as the Central Arctic Ocean fisheries

89 All-Atlantic Ocean Research and Innovation Alliance.
90 Mission Actions – EU Mission Restore our Ocean and Waters.
91 COM(2025) 281 final.
92 COM(2026) 268 final.
93 JOIN(2025) 26 final.
94 JOIN(2025) 135 final.
95 Common Maritime Agenda for the Black Sea.
96 SWD(2024) 175 final.
97 JOIN(2021) 27 final.



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Agreement – CAOFA), which entered into force on 25 June 2021. The 10 Parties[98] have agreed not to engage in commercial fishing activities in the high seas portion of the Central Arctic Ocean for an initial period of 16 years (until 2037). In the meantime, the Agreement will facilitate scientific cooperation and establish a joint programme of scientific research and monitoring. This might ultimately result in a decision to commence negotiations to set up an RFMO for the area. The EU and Canada have played an important role in co-leading the working group on the development of this joint programme and have actively promoted scientific work under the Agreement. EU scientists have taken part in two scientific research expeditions to the Central Arctic Ocean that will provide essential data for better understanding the Arctic ecosystem. The Agreement thus fills an important gap in the international ocean governance framework and support for its proper implementation is a key action under the EU's Arctic policy and the EU's IOG.

Since 2020, the EU's renewed Strategy with **Africa** has spurred the development of continental EU-Africa cooperation on the ocean and a sustainable blue economy, including fisheries and aquaculture. It has been implemented through match-making events - BlueInvest Africa[99] - between investors and African entrepreneurs that showcase Africa's innovation potential (including in fisheries and aquaculture); and through the setting-up of an Africa-Europe Ocean Strategic Group that identified priority actions in several areas, including the promotion of fisheries transparency and equitable benefit-sharing[100]. At the seventh EU-AU summit[101] in November 2025, leaders from both continents restated their shared view that fisheries and aquaculture as well as food security are fundamental common interests. They also reaffirmed their commitment to promoting the sustainable management of natural resources, including combating wildlife trafficking and IUU fishing.

The 2021 EU Strategy for Cooperation in the **Indo-Pacific**[102] identified ocean governance as a key area for enhanced engagement with the region. The Strategy promotes a rules-based approach to the management and sustainable use of marine resources that is grounded in international law and particularly in UNCLOS. In this context, the EU aims to strengthen cooperation with its Indo-Pacific partners on sustainable fisheries management; combating IUU fishing; improving fisheries compliance and control systems; and supporting the conservation and sustainable management of marine biological resources. The Strategy also emphasises the importance of cooperation through regional and multilateral frameworks (including RFMOs) for advancing sustainable ocean governance and the long-term sustainability of fisheries resources.

## 4 CHANGES AND CHALLENGES SINCE 2011

This Chapter builds on and expands the findings of the evaluation of the CFP Regulation[103], also using additional assessments carried out by the Commission and the main outcomes of the consultation process[104].

98 The parties are Canada, China, Denmark (in respect of Greenland and the Faroe Islands), the EU, Iceland, Japan, Norway, Russia, South Korea and the USA.

99 Home | BlueInvest Africa South Africa 2026.

100 Africa-Europe Ocean Strategic Group drives the partnership between two continents – Oceans and fisheries.

101 Joint declaration of the seventh African Union – European Union summit 2025, 24-25 November 2025.

102 JOIN(2021) 24 final.

103 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), in particular Section 4.1.1 (Effectiveness).

104 See Annex II.



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## 4.1 A more complex and challenged multilateral system

**Ocean governance, including international fisheries management, has arrived at a crossroads of multilateral fragmentation, geopolitical competition and security threats.** Challenges to multilateral frameworks are growing. Global players such as China, Russia and the USA are increasing these challenges by prioritising national, ideological, security or economic interests over collective solutions. One clear example is the USA stepping back from UN ocean processes and taking unilateral actions such as advancing deep-sea mining outside the International Seabed Authority. This is undermining UNCLOS, which is the legal framework within which all activities in the ocean and seas must be carried out. It is also placing strain on institutions such as the IMO, including on the delivery of net-zero ambitions.

Moreover, geopolitical rivalry is increasingly shaping the maritime domain through competition over resources, shipping routes, territorial claims, the militarisation of maritime zones and technological dominance. China has become a heavyweight in international organisations linked to the ocean – with a strong focus on exploitation, challenging the Law of the Sea and displaying its ambition to become a maritime power. China has gained considerable influence in Africa, Latin America and the Indo-Pacific, where China's DWF has considerably expanded. Its approach is based on registering vessels under flags of convenience; concluding (largely private) access agreements; developing fishmeal factories; building/controlling port infrastructure; and weak compliance with international labour standards. This poses a direct challenge to the EU's policy on sustainable fishing and impacts the EU fleet economically.

Finally, maritime security is an inherent component of ocean governance. The expansion of shadow fleets that operate outside regulatory oversight is undermining safety, sanctions enforcement and environmental protection. The EU has sought to address the issue by diplomatic means and with sanctions on individuals and entities that support Russia's shadow fleet and its value chain, with a view to curbing Russia's revenue-generating capacity. This includes fisheries operators. Furthermore, Russia's withdrawal from fisheries cooperation has disrupted decades of scientific collaboration and threatens food security.

Effective engagement in UN processes therefore requires not only the promotion of ambitious policy objectives but also **sustained efforts to defend and uphold the rules-based international order**, safeguard the integrity of the Law of the Sea and ensure consistency between related international processes, including the WTO, FAO, BBNJ agreement and CBD. It also requires continuing engagement with partner countries (including through capacity-building and technical cooperation) to support the implementation of international commitments.

## 4.2 Changes in the EU neighbourhood's geopolitical context

### *4.2.1 Changes in the Northeast Atlantic post-Brexit*

**Brexit has introduced a structural shift in Northeast Atlantic fisheries governance**[105]**.** It has not only opened a new chapter in EU-UK fisheries relations but has had multidimensional effects.

Brexit has affected EU processes for managing stocks that were previously under exclusive EU competence but are now shared resources. This has implications for regionalisation within the EU and the functioning of the advisory councils. It has also impacted Member States' access to UK waters and resulted in most stocks now being subject to bilateral, trilateral or multilateral management.

At the international level, the UK's participation in negotiations as an independent coastal state has changed the negotiation dynamics between the parties and has an impact on sharing

105 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), pp. 47, 86 and 91.

arrangements on three key pelagic stocks that are shared with other coastal states. The transition to a trilateral EU-Norway-UK management context is a significant change because stocks that were formerly managed bilaterally by the EU and Norway are now part of annual trilateral consultations between the EU, Norway and the UK. The UK's independent regulatory role nevertheless requires bilateral coordination because the respective EU and UK shares in trilateral TACs are enshrined in Annex 37 of the TCA.

At the multilateral level, the UK now participates independently in NEAFC and other coastal state consultations, thus altering the voting geometry and regional balance. The UK's active pursuit of an internationally visible fisheries role is placing further pressure on regional governance. Coordination in the multilateral forum remains critically important to prevent overfishing of widely distributed pelagic stocks, safeguard sustainable yields and maintain a level playing field for all parties. Brexit has increased the EU's need for coordination with the Faroe Islands, Iceland, Norway and, in some cases, Russia – particularly for widely distributed pelagic stocks and high seas demersal fisheries.

**The suspension of Russia** from NEAFC subsidiary bodies as well as ICES, due to its full-scale war of aggression against Ukraine has facilitated cooperation between like-minded NEAFC Parties. The Northeast Atlantic partners have largely aligned themselves with several packages of sanctions that the EU has adopted in response to Russia's destabilising fishing activities.

**These changes are reverberating at all levels of cooperation.** Disagreements have resurfaced over the years in the maritime zones of the archipelago of Spitsbergen (Svalbard), which are governed by the 1920 Treaty of Paris[106], because Norway has taken measures to limit EU fisheries. The November 2024 EU-Norway High-Level Dialogue reestablished the EU's access quota for Arctic cod in this area. This is a positive development to build upon in order to solve pending controversies regarding EU fisheries in Svalbard waters.

In the coastal states' forum, TACs have usually been agreed in line with scientific advice, but Parties are increasingly seeking to reduce the EU's current shares of pelagic stocks, which is also impacting overall scientific and control cooperation. A lack of agreement on the sharing of the TACs has resulted either in each coastal State setting its own quota unilaterally or in the signature of partial arrangements. This has led to the sum of single quotas exceeding the total set TAC – a major concern for the EU.

In NEAFC, the adoption of effective management measures is being challenged by parallel coastal states' informal bilateral or multilateral consultations. This results in very few stocks having an agreed TAC and even fewer having a sharing arrangement. Russia's use of transhipments at sea to maintain its activities and avoid controls is by far the most important control issue in NEAFC. In recent years, the EU has maintained a strong voice on the need to ban transhipments at sea in NEAFC. The EU continues to work to enlist the support of like-minded NEAFC Parties in order to adopt measures to tackle Russia's unsustainable fishing activities and to sustainably and effectively manage NEAFC stocks.

These recent developments have made it **increasingly challenging to ensure stability and predictability in access arrangements to third-country waters**. The 2025 EU-UK agreement was of major importance for ensuring predictability until 2038, but the EU-Norway arrangements on reciprocal access to their respective waters have varied. Non-quota stocks, for which policy at EU level remains less developed, are under increasing pressure and are a clear example of the need for closer cooperation and joint management approaches.

The EU is also facing growing competition for maritime space in the Northeast Atlantic. The expansion of offshore renewable energy, MPAs and other uses of the sea is increasing pressure

106 The Treaty of Paris requires Norway to ensure equal access and equal treatment to all Parties. The fishing operations of EU Member States' fleets in the waters of the archipelago of Spitsbergen go back for centuries. 22 EU Member States are currently Parties. EU fleets catch cod, shrimp and other species.

on fishing activities. In this context, coordination on maritime spatial planning is becoming as important as cooperation on fisheries quotas and management measures to ensure sustainable fisheries, avoid conflicts and support the long-term viability of coastal communities. Engagement with third countries within the contexts of regional strategies and through dedicated forums such as the Greater North Sea Basin Initiative remain key.

### *4.2.2 Mediterranean and Black seas*

**A new dynamic has emerged in the Mediterranean, but there is still a lot at stake.** Building on the 2017 MedFish4Ever ministerial declaration and considering new challenges that have emerged over the last 10 years (e.g. illegal fishing, fleet overcapacity and climate change), EU and Mediterranean countries made a commitment in a high-level ministerial conference in May 2026 to continue their cooperation to rebuild Mediterranean fish stocks. They also agreed to adopt a new MedFish4Ever declaration in 2027.

**The EU's role and responsibility in the Black Sea region is increasing.** The region is a critical connector between Europe, the Southern Caucasus, Central Asia and the Eastern Mediterranean. Russia's full-scale war of aggression against Ukraine has impacted people, economies, infrastructure and ecosystems – including the fisheries sector. The environmental challenges of the Black Sea need stronger regional cooperation to protect marine ecosystems, develop the blue economy and increase the climate resilience of coastal communities. A safe and secure Black Sea is essential for freedom of navigation and for maritime safety and security, and to enable concrete regional cooperation to address common environmental challenges. In this context, the proposal made by the Commission and the High Representative[107] to establish a Black Sea Maritime Security Hub should contribute to strengthening maritime security and protecting critical maritime infrastructure. It should also benefit the Black Sea's ecosystems.

The EU enlargement process should also contribute to bringing the Black Sea region closer to the EU and strengthening cooperation in fisheries management and blue economy. The GFCM and the CMA for the Black Sea will be instrumental in this regard (Ukraine's adhesion to the GFCM in 2025 should bring its national fisheries policy closer to that of the Union).

### *4.2.3 Other regions*

The **Arctic** is increasingly at the forefront of geopolitical developments. The Arctic and North Atlantic are becoming critical for the EU's security, including for early-warning systems, secure maritime routes, critical raw materials and strategic infrastructure. Russia's full-scale war of aggression against Ukraine has profoundly affected Arctic governance and regional cooperation. Indeed, the seven other Arctic states suspended their participation in activities that were taking place under the auspices of the Arctic Council during Russia's chairmanship. Since the transfer of the chairmanship to Norway in May 2023, cooperation has gradually resumed in a limited number of areas, primarily focusing on technical work.

Global political developments are increasingly shaping the Arctic. The European Arctic - the Arctic regions of Denmark, Finland, Iceland, Norway and Sweden – is increasingly important for the EU's strategic autonomy and economic security. In this context, the EU has updated[108] its Arctic policy to reflect evolving geopolitical realities and to strengthen its approach on security and defence, climate action and the sustainable governance of the ocean and fisheries.

The **Indo-Pacific** is a major fishing ground for the EU and is yet another region where, in the current context of geopolitical and geoeconomic change, the EU is steadily stepping up its strategic engagement through multiple partnerships. The EU's agenda is still framed by the 2021 Strategy[109], but is increasingly focused on defence and security, trade and economic

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107 EU's strategic approach to the Black Sea, JOIN(2025) 125 final.

108 JOIN(2026) 100.

109 Council conclusions on EU strategy for cooperation in the Indo-Pacific, 19 April 2021.

resilience, secure supply chains and green alliances to tackle climate change. One overarching concern is the safeguard of the rules-based international order regarding maritime security, ocean governance and regional stability. Defence and security as well as trade agreements (including with Australia, India, Japan and South Korea) reflect the EU's enhanced strategic engagement in the Indo-Pacific.

### 4.3 The urgent need to act to achieve the Sustainable Development Goals (SDGs)

The 2030 Agenda provides an important international framework for linking the sustainable use of marine resources, the protection of biodiversity and proper international ocean governance. The EU's international record is strong[110]. Its action within RFMOs and SFPAs, zero-tolerance policy towards IUU fishing and leading role in the negotiation of the WTO agreement on fisheries subsidies and the BBNJ agreement demonstrate the EU's strong commitment to SDG 14, effective multilateralism and open, rules-based and fair trade. The EU has used its international partnerships to increase its financial support for the implementation of SDG 14 (see above), thus pursuing the objectives of the European Ocean Pact at global level.

Despite these efforts, **achieving the SDG 14 target of 100% of stocks within biologically sustainable levels remains extremely challenging**, particularly in regions characterized by complex multispecies fisheries and limited assessment and management capacity[111]. The same is true for the elimination of harmful subsidies and the elimination of marine pollution. Moreover, **SDG 14 remains the least funded SDG globally**. This might be due to the generally lower awareness of, and political priority given to marine issues, but it might also be due to the cross-cutting nature of SDGs and insufficient recognition that success in reaching SDG 14 targets also depends on making progress on other SDGs (more sustainable food systems, reducing water pollution and tackling the interconnections between freshwaters and oceans), while progress on SDG 14 is a key contributor to the objective of halting biodiversity loss.

### 4.4 The impacts of climate change on fisheries

**There is worldwide recognition of the impacts of climate change on fisheries.** Stress is caused not only by higher temperatures but also by higher acidity and lower oxygen levels, which in turn affect the plankton on which fish feed. These changes will affect the distribution of fish populations because some species move away from current fishing grounds or into deeper water. The redistribution of biomass implies a redistribution of fishing opportunities: countries in temperate areas may gain access to new or expanding stocks, while tropical countries risk losing access to historically important species. This potential shift in fisheries productivity between regions could create global inequalities in aquatic food supply and trade and pose governance challenges for transboundary and migratory stocks[112]. Mobile, large-scale fleets will adapt better than small-scale, community-based fleets. Communities at lower latitudes will see their fish landings go down, while communities at higher latitudes will see them go up. Poor communities in the tropical South will suffer losses while communities in the North will experience higher fishing pressure.

Productivity of fish stocks in the mid-latitudes is expected to decrease[113]. The changes are expected to more severe in partially enclosed seas such as the Black Sea, the Baltic and the

110 EU Voluntary Review on the implementation of the 2030 Agenda for Sustainable Development.

111 The State of World Fisheries and Aquaculture 2026, FAO, pp. 56-57.

112 The State of World Fisheries and Aquaculture 2026, FAO, pp. 170-171.

113 In the Northeast Atlantic, the productivity of colder-water fish (e.g. cod and herring) is already decreasing (Greater North Sea Ecoregion – Ecosystem overview, ICES Advice: Ecosystem Overviews, Report, Section 9.1, 2021), while the productivity of warmer-water species (e.g. hake in the Mediterranean and potentially invasive species such as lionfish and lizardfish) is increasing (Report of the Sub-Regional Technical meeting on the Lessepsian migration and its impact on Eastern Mediterranean fishery, EastMed Technical Documents, FAO, 2010).

Mediterranean[114]. This creates additional uncertainty both for EU operators and small-scale fishing communities and for post-harvest value chains in the EU and its partner states. This in turn has potential implications for the fairness and value of sharing arrangements in all types of fisheries management systems (RFMOs, stocks of common interest and SFPAs).

**The next decade is likely to see the challenge of concretely dealing with the climate-ocean nexus**. The future sustainability of fisheries result from a combination of changes in productivity and management actions setting adequate exploitation levels that incorporate these changes. Global models show that if fishing pressure is reduced and stocks are allowed to rebuild, biomass losses under warming scenarios can be partially offset, particularly under low emissions pathways[115].

**Climate change has penetrated the agenda of the RFMOs' scientific committees, but finding adequate resources to support their scientific work is a struggle.** In 2019, the WCPFC was the first RFMO to adopt a resolution on climate change in response to the concerns of small island developing states. Several other RFMOs have since adopted resolutions on climate change, and this topic has gradually become a standing agenda item. The next phase is to put these resolutions into practice and to identify and plan for the various possible scenarios in each specific context. It will be necessary to reflect on how best to approach the issue, taking into account the specificities of each RFMO in terms of fish stocks, membership, scientific/technical/financial capabilities/resources, forecasted climate change impacts under different climate scenarios, etc.

Whether in RFMOs or under the SFPAs, **assessing the impact of climate change on the EU's relations with third countries and its external fishing interests** will be key, as will envisaging appropriate responses and identifying socio-economic interests that are entangled with other objectives.

### 4.5 IUU fishing is now part of the global agenda but still a major concern

According to the FAO, IUU fishing accounts for up to 26 million tonnes of fish caught annually[116]. The EU is playing an active role in countering this, but experience shows that only **strong and persistent political will** can achieve lasting results in the form of stable fisheries compliance. Monitoring and assisting states' compliance with international and regional obligations is key.

**More must be done** not only by developing countries but also by important developed fishing nations. The EU needs to strengthen the implementation of its control rules even further, but other important fishing nations and markets must also join international instruments. Some important partners seem to be moving slowly in this direction. It is becoming ever more urgent to restore many fish stocks and level playing field, and therefore to accelerate reforms.

**Monitoring and controlling of long-distance fleets** that operate far from home ports across all oceans remains a challenge in the context of growing demand for fish and competition between fleets. It is crucial to continue engagements and dialogues on fighting IUU fishing with third countries to improve not only flag state controls but also coastal, port and market state controls in line with international obligations. For the EU, the possible non-compliance of its external fleet and operators is a reputational risk. New technologies can be used to increase the coverage and scale of fisheries documentation, monitoring, control and enforcement, and also to reduce their cost.

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114 IPCC Special Report on the Ocean and Cryosphere in a Changing Climate, IPCC, 2019, p. 755; Climate Change and European Fisheries and Aquaculture: 'CERES' Project Synthesis Report, 2020.

115 The State of World Fisheries and Aquaculture 2026, FAO, pp. 170-170.

116 Illegal, Unreported and Unregulated (IUU) fishing | Food and Agriculture Organization of the United Nations (fao.org).

**Data transparency, as well as more timely and ideally electronic reporting of fishing data**, (e.g. catch and effort of domestic or other foreign fleets) is insufficient on its own to ensure both the effective monitoring of fishing operations and robust scientific assessments. Such an approach would have to be more systematic and overarching, but this may be difficult for partner countries to accept in the absence of development support targeted to the affected populations.

**Combating IUU fishing requires coordinated action.** No country can achieve success by acting alone. Experience has shown that combating IUU fishing is much more effective if there are synergies at regional and international level. When a country strengthens its system of controls on IUU fishing, there is a risk that operators who flout the rules may move to other countries with less stringent laws and controls. Success therefore requires as many countries as possible to be involved in a continuous, proactive and vigilant action against IUU fishing at international level as well as at regional level.

### 4.6 Level playing field: overcapacity and transparency

**Overcapacity remains a major concern** at global level[117]. The EU has taken two main initiatives to address this. First, it has worked within RFMOs where an imbalance between fishing capacity and available resources has contributed to the overexploitation of many stocks. Collective efforts have succeeded in capping capacity in some tuna RFMOs.

Second, in the WTO, the Fisheries Subsidies Agreement was a major step in establishing multilateral rules on fisheries subsidies (see above), but there is still no agreement on the prohibition of certain subsidies contributing to overcapacity and overfishing. These subsidies raise the question of fair competition among countries. Special and differential treatment for developing countries is an integral part of the negotiations. The WTO's members are aiming to complete the negotiations on additional rules by the 15th ministerial conference in 2028, or at the latest before the expiration of the sunset clause in the Agreement on 15 September 2029. This clause, according to which the Agreement should be terminated four years after its entry into force if no further prohibitions are agreed, increases the need to reach an agreement on subsidies that contribute to overcapacity and overfishing.

The SMEFF Regulation has made fishing outside EU waters more transparent, but **information on reflagging and joint ventures** is still not transparent, even though it is a significant phenomenon. The EU has in the past given financial support for the setting-up of joint ventures between EU fishing companies and local partners in third countries, through which EU fishing vessels are transferred to that third country and gain fishing opportunities in its waters. However, the impact of this type of agreement was judged to be limited and criticised because it decreased EU accountability[118]. Joint ventures are nowadays often a legal condition for accessing certain fishing rights in third countries[119]. Joint ventures may or may not be accompanied with chartering (this is subject to some RFMOs' provisions). The EU no longer subsidises joint ventures, but they are still often criticised for lack of transparency regarding the beneficial owners of vessels and for unfair competition with artisanal fisheries. Some stakeholders argue for EU action to increase the transparency and sustainability of EU fisheries joint ventures in third countries.

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117 See Annex I, Review of the state of world marine fisheries resources 2025, FAO, and OECD Review of Fisheries 2022.

118 Fishing outside the European Union – The external dimension of the common fisheries policy, European Parliament Research Service, 2025, p. 33.

119 Host country legislation usually requires 51% ownership of a vessel by a national before it can be included in the national register. See, for example, Article 32 of Angola's Law of 12 October 2004, which limits fishing rights to foreign individuals or collective persons in association with Angolan persons.

In that context, lack of transparency regarding the **ultimate beneficial ownership (UBO)** of vessels and fishing companies is a cause for widespread concern. Within the EU, some stakeholders argue that UBO transparency is insufficient and making it difficult to ensure that all EU regulations (including those on IUU fishing) are enforced. Non-EU-flagged vessels and non-EU registered owning companies are often governed by weak national regulatory frameworks on UBO and are associated with IUU fishing. In many cases, this is compounded by vessels being registered under flags of convenience.

The use of open registers that act as **flags of convenience** has become a widespread practice[120]. The countries that offer them tend not to comply with international obligations or to have low enforcement capacity. Registering vessels under flags of convenience makes it easier to conceal the identity of the UBO of fishing vessels, making it difficult to impose sanctions and to prevent illegal practices. Moreover, these countries generally do not cooperate with other states that are concerned by IUU fishing and they can undermine those states' work. The FAO addresses the issue of flags of convenience in the Compliance Agreement. However, participation in the Compliance Agreement remains limited – despite its continuing relevance – and this in turn raises the question of how to further promote and integrate its objectives into contemporary fisheries governance. Furthermore, flags of convenience are often associated with '**ports of convenience**' (i.e. ports that apply weak controls and where it is easier to launder fish caught during IUU fishing).

**Transhipments at sea** are common in all regions of the world and in various fisheries, in waters under national jurisdiction and on the high seas. Transhipment can significantly improve the efficiency of fishing activities by reducing operational and transport costs. However, it also creates challenges for monitoring, control, enforcement and traceability, including by providing opportunities for IUU catches to reach port and market destinations. The recent FAO Voluntary Guidelines for Transhipment clearly and for the first time define concepts, processes and the responsibilities of states in their different roles. However, this is only the first step. The guidelines are a voluntary instrument and, for them to be effective, states must take action to transpose them into regional and national regulations and ensure their effective implementation.

These widespread phenomena – lack of transparency regarding ownership, flags of convenience, ports of convenience and concealed transhipments – originate in the **insufficient transparency of fleet operations globally**. This is due to weak identification systems, insufficient use of monitoring technologies and ineffective international information-sharing. One key starting point would be to ensure that all industrial fishing vessels have a unique IMO identifier (as required by the Cape Town Agreement). This makes it possible to track vessels throughout their life – even if they change their name, ownership or flag. Global registries, such as the FAO's Global Record of Fishing Vessels, can, if regularly updated and completed, help in compiling and publishing information on vessels and their activities. In parallel, satellite tracking technologies (including VMS and the automatic information system - AIS) enable authorities to monitor fishing activity throughout the world's oceans and identify suspicious practices such as IUU fishing or unauthorised transhipment.

Transparency also requires stronger reporting and information exchange. Digital tools such as electronic logbooks, onboard monitoring systems and digital catch documentation improve the reliability and traceability of fishery products from vessel to market. International cooperation mechanisms further reinforce this system. The Global Information Exchange System established under the PSMA aims to facilitate the exchange of information on inspection reports and port denials, making it harder for vessels involved in IUU fishing to move between ports

120 Study on flag State responsibilities and 'open registers' for vessel registration, European Commission, 2026.

undetected. Public disclosure of fisheries data (licences, quotas and enforcement) strengthens accountability across the fisheries sector.

### 4.7 RFMOs are challenged by new power struggles and stronger expectations to integrate environmental concerns

**RFMOs are increasingly instrumental in the implementation of new and emerging international instruments** addressing the climate crisis, IUU fishing, pollution, fisheries subsidies, and conservation and sustainable use of biological diversity. To address current and future challenges, RFBs require strengthened mandates, enhanced coordination, and more inclusive governance that actively engages key sectors and stakeholders. Building adaptability into decision-making processes is essential as RFBs confront emerging issues such as shifting species distribution, technological innovation, and greater coherence across fisheries, biodiversity and climate agendas[121].

**It is not always possible to achieve the EU's objectives in RFMOs**. The need for consensus often frustrates efforts to reform RFMOs' decision-making processes. Other Parties do not always support the EU's proposals in full, despite the EU's efforts to strengthen those organisations and support scientific research and science-based management decisions. Nevertheless, some newly created RFMOs (SPRFMO) incorporate efficient decision-making processes, and in some cases (e.g. ICCAT), the revision of the convention has brought some flexibility into the decision-making processes – despite consensus being the rule.

The membership of RFMOs is now genuinely global, but **there are still significant discrepancies in the capacities and aspirations of members**. As in other multilateral forums, power struggles stemming from geopolitical considerations exist and may override conservation and management issues and undermine negotiation processes[122]. As a result, progress in scientific research and advice has not necessarily translated into robust management decisions. Despite substantial EU financial support, limitations in resources remain an important challenge in most RFMOs[123].

Some progress has been made in documenting and controlling fishing operations and monitoring compliance, and most if not all RFMOs have adopted country-by-country **compliance** processes. Gaps nevertheless persist in follow-up and appropriate remedial actions. The EU has submitted proposals to address those gaps and has in some cases (ICCAT, IOTC, IATTC) succeeded in making the compliance process more structured. The EU remains the main driving force in all RFMOs and advocates for comprehensive transparency measures, particularly in relation to combatting IUU fishing (including through transparency on beneficial ownership). All the RFMOs have now adopted IUU vessel lists and cross-list vessels with other RFMOs.

RFMOs are increasingly expected to ensure **the consistency of their decisions with changes in other international provisions dealing with biodiversity**. This has given rise to calls for better coordination between RFMOs and RSCs. There are some successful examples and good practices of dialogues between those organisations. Steps have also been taken to improve communication and mutual understanding between RFMOs and MEAs, but there is still considerable room for improvement (particularly the recognition of RFMO scientific research and advice by MEAs).

The **implementation of the BBNJ agreement** is both the most important challenge and the most important opportunity. The EU is a global leader in the RFMOs and therefore has a key role to play in ensuring that the BBNJ agreement and the RFMOs interact in an effective and mutually reinforcing way. Against this background, the EU promoted in 2026 a specific process

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121 The State of World Fisheries and Aquaculture 2026, FAO, p. xxiii.

122 More detail in Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 70.

123 More detail in Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), pp. 69-70.

of reflection in all the RFMOs of which it is member on how they contribute to, and interact with, the BBNJ agreement, its bodies and processes.

The European Parliament is advocating for the **establishment of new RFMOs**. Its January 2024 resolution[124] stated that an RFMO should cover every ocean area. It is important for the EU for the CECAF area to be turned into a fully-fledged RFMO as well as for an RFMO to be established for the South-west Atlantic (particularly to manage demersal stocks in this area).

### 4.8 SFPAs: providing fishing opportunities to the EU within a predictable framework and supporting partners in sustainable fisheries management

SFPAs have evolved to do more than provide access to waters and sectoral support. They are one of the tools that the EU can use to strengthen its partnership with a given country and engage on a wide range of ocean and fisheries matters and maintaining a constant and open dialogue on them. However, they are challenged by the evolving international **geopolitical context and broader positioning of partner countries vis-à-vis the EU**. Global competition on access to resources (and the presence of other fleets) and high expectations from partners are the biggest challenges resulting from the geopolitical context.

SFPAs are an important tool in the EU's external fisheries policy and can serve its wider geopolitical and economic interests as well as partner countries' coastal communities. There is scope to enhance **policy coherence** by promoting the EU's wider ocean and fisheries priorities: cooperation in RFMOs, the development of a sustainable blue economy, combating IUU fishing, and strengthening scientific knowledge to underpin sustainable fisheries management and ecosystems protection.

SFPAs have helped provide fishing opportunities for the EU external fleet within a predictable framework. However, the EU fleet has repeatedly voiced its concern that '**dormant agreements**' are constraining the agility of fleet operations and the level playing field, due to the exclusivity clause. Moreover, most SFPAs target migratory species that straddle the EEZs of several coastal states, but SFPAs are country specific. There is scope to improve **consistency and coherence** between different SFPAs' protocols and to promote cooperation within the same region on shared priorities and challenges, thus making fisheries management more sustainable.

Some stakeholders are increasingly criticising the **use of the EU budget to help gain access to waters of third countries**. This criticism should be set against the fact that the EU fleet does not use all the fishing opportunities agreed through SFPAs optimally.

The EU fleet is subject to **ambitious standards** in terms of the sustainable exploitation of resources and labour conditions. Its competitors in other long-distance fleets from third countries often have lower standards. In this regard, partner countries may benefit from further sectoral support to improve their monitoring and control systems and to further develop their scientific capacities.

Although all SFPAs contain a **non-discrimination clause** and a **transparency clause**, these provisions are not being properly enforced.

SFPAs are unique access agreements that are different from other countries' long-distance fleets. The EU publishes its agreements and a considerable amount of relevant information on each SFPA webpage. **Stakeholders nevertheless feel insufficiently involved in the negotiation and implementation of SFPAs** and particularly in the definition and implementation of sectoral support. This is a lost opportunity for the EU in general and SFPAs

124 Implementation of the Common Fisheries Policy and Future Perspectives.

in particular, which are **rather negatively perceived** in several third countries. These negative perceptions are often fed by fake news and can be difficult to counter.

### 4.9 Renewed challenge to articulate EU policies in support of sustainable global fisheries

**The EU's policy frameworks have significantly changed.** In June 2025, the Ocean Pact[125] was introduced as a holistic framework for all ocean-related policies. The ongoing reshuffling of global economic competition and geopolitical relations is at the same time leading the EU to significantly reposition its strategic partnerships and economic value chains. To achieve its core objectives of sustainability and improved IOG, EU external fisheries action needs to be better articulated with other EU policies.

As stated in the Ocean Pact, the EU is committed to **further promoting a rules-based IOG anchored in environmental sustainability**. The MEAs on the protection of endangered species (CITES and CMS) increasingly cover marine species. This is in turn raising scientific, technical and legal issues between these instruments and fisheries bodies. Conservation measures are most effective when they are implemented in a manner that complements and is mutually supportive of existing fisheries management systems. The implementation of the new Global Biodiversity Framework and the BBNJ agreement is a priority for the EU. Fisheries policy will have to contribute, either in its bilateral relations with partner countries (i.e. SFPAs and development cooperation) or in RFMOs. The articulation of BBNJ objectives with existing fisheries governance frameworks remains a work in progress.

**Aquaculture** is the fastest-growing food production sector globally. It now provides more than half of aquatic animal products for human consumption and plays an increasing role in food security. The FAO Guidelines for Sustainable Aquaculture[126] provide a voluntary global framework for sustainable development in the sector, but the worldwide development of aquaculture can, if not properly managed, place pressure on wild fish stocks and ecosystems. Aquaculture currently has a limited role in IOG (most production takes place in inland or territorial waters), but its rapid expansion and emerging offshore technologies may increase its international dimension in the future.

It is crucial in this context to **apply scientific knowledge when taking fisheries management decisions** at the international level. Within RFMOs, ecosystem management needs to be applied more concretely and systemically. Under SFPAs, the scientific assessment is either carried out by the relevant RFMO (tuna species) or by a joint scientific committee of the SFPA (non-tuna fisheries) where scientists share available data, assess stocks and formulate recommendations. One cross-cutting issue is the need to increase understanding of the geographic and species-specific impacts of climate change in RFMOs and third countries' waters. Efforts on this point should be complemented by the EU's work to establish an international panel on ocean science (IPOS) and a global ocean observation system (GOOS) as well as by a further contribution to international cooperation under the EU's research programmes.

**Social responsibility** requires that workers must enjoy decent and fair working conditions globally. Stakeholders express strong concerns in this regard. Raising social standards – decent work, occupational safety and health, migrant workers' rights and non-discrimination – and addressing forced labour are key elements that social partners have raised on many occasions. Finding a credible and workable pathway is a major challenge because the issues relate to a very diverse set of policies and instruments. Labour issues linked to migrant workers in the DWF have received increasing attention, both in RFMOs and SFPAs. Trade unions still express concerns about fair working conditions, pay and certification. Dealing with this will require a

125 COM (2025) 281 final.

126 Guidelines for Sustainable Aquaculture, FAO, 2025.

shift in mindset and habits, because RFMOs are historically dedicated to fisheries management rather than social issues.

The key challenge at the international level remains the ratification of the ILO and IMO conventions[127] and their effective enforcement. Insufficient and ineffective inspections (including labour inspections and sanctions) are a major problem. Further work is also needed on the drafting of social responsibility guidelines in the FAO Committee on Fish Trade. Within the EU, not all Member States have ratified all the ILO core fisheries conventions. The Commission has announced an initiative to introduce harmonised standards on training and certification of fishers with the launch of an impact assessment as well as a call for evidence and public consultation in 2026.

On the economic side, **the EU's dependence on imported aquatic products has significantly increased**. This trend is being driven by a combination of declining domestic landings and stagnation in aquaculture in a context of declining apparent consumption. RFMOs and SFPAs have continued to make a significant contribution to the EU's supply of a range of species, but overall landings by the EU's DWF have been decreasing. The EU fish processing industry's strong reliance on imported raw materials increases its exposure to global market volatility and external shocks. Stakeholders point out that the EU fleet is generally subject to stricter environmental and social standards than other fleets.

**Gaps remain in sustainability requirements for imports, traceability and information throughout the supply chain.** Under the EU's trade policy, a series of autonomous measures and FTAs have set sustainability requirements that apply to all products placed on the EU market – including fisheries and aquaculture products. Coherence across all instruments needs to be ensured. The Commission is therefore assessing how to introduce sustainability criteria into the ATQ regime, where access is not currently conditional on such requirements. With more than 20 partner countries, the FTAs provide an institutional framework (and, in the last resort, related dispute settlement provisions) that can be used to promote fisheries and aquaculture practices, and thereby a level playing field. However, not all FTAs in place contain a similar level of sustainability commitments.

**Stakeholders consider unfair competition / international competition as the top challenge**, because they are concerned that EU-produced aquatic food will be placed at a competitive disadvantage to products coming from third countries that have less stringent environmental, social and administrative regulations[128]. Stakeholders generally call for more consistency between the CFP objectives and a sustainable and fair trade policy; a tightening of import controls to ensure full implementation of the IUU Regulation and the Forced Labour Regulation; and making access to the EU market, under all types of trade regimes, conditional on the implementation of all key environmental, social and human rights international agreements. Stakeholders also highlight the importance of phasing out harmful subsidies in WTO negotiations and assessing the impacts of imports of feed for aquaculture on the development of EU aquaculture.

**Citizens' ethical engagement** is also increasing. This has been demonstrated by the European Citizens' Initiative on trade in shark fins, which was submitted to the Commission in 2023 and requests the Commission to introduce a ban on the export and import of loose shark fins. The

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127 These include the Freedom of Association and Protection of the Right to Organise Convention, 1948 (No 87); the Right to Organise and Collective Bargaining Convention, 1949 (No 98); the Forced Labour Convention, 1930 (No 29) (and its 2014 Protocol); the Abolition of Forced Labour Convention, 1957 (No 105); the Minimum Age Convention, 1973 (No 138); the Worst Forms of Child Labour Convention, 1999 (No 182); the Work in Fishing Convention, 2007 (No 188); the ILO Maritime Labour Convention, 2006, as amended (MLC, 2006); and the IMO 2012 Cape Town Agreement, which will enter into force in February 2027.

128 See Annex II.



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Commission's response[129] includes making the best use of existing policy tools that are relevant to shark conservation and management; stepping up its international outreach to protect endangered sharks; increasing the EU's capacity to monitor trade in shark products at species level; and assessing the environmental, social and economic consequences of measures suggested by the ECI as well as alternative policy measures. The related Commission's impact assessment is expected by the end of 2026.

In a similar vein, **EU market rules are considered a significant lever that can be improved still further**. In general, stakeholders call for labelling requirements to be tightened and their enforcement to reduce fraud, increase transparency for imported products and reward sustainable value chains. The CMO Regulation governs mandatory and voluntary consumer information. In practice, transparency may be limited for fishery products, because some elements (particularly catch area information and the way it is presented) can be technical, difficult to interpret and occasionally ambiguous for consumers. In addition, the mandatory consumer information requirements do not apply to prepared and preserved (i.e. processed) products. This can limit the effectiveness of labelling in supporting informed purchasing choices and fair competition[130].

Overall, the EU is expected to deliver higher standards of import sustainability without compromising open and transparent trade, thus **striking the right balance between a diverse set of interests**. This will require careful assessment of feasibility; the impacts on costs for operators and consumers; the risk of increasing the already high level of market volatility; the need to ensure compatibility with WTO and other bilateral and multilateral commitments; and the risk of reciprocal restrictions and/or trade diversions.

**Relations with developing countries are strained overall and ocean issues are no exception.** Food security remains a challenge globally. However, while 40% of capture fisheries and 90% of all employees in capture fisheries value chains are in small-scale fisheries[131], awareness, implementation capacities and/or political will are often too weak to strengthen fisheries management and provide the required skills and financial capacities to the sector.

The EU has significantly rebalanced its agenda, diversifying away from traditional development programmes and upgrading its relations through wide-ranging agreements. However, the effective implementation of these initiatives is complex and renders bilateral relations in fisheries even more complex and prone to inconsistency. Partner countries nevertheless increasingly recognise the necessity and benefits of stepping up efforts on ocean protection, the development of a regenerative and inclusive blue economy and sustainable fisheries management when they cooperate with the EU.

**Working on innovative financing for ocean governance is therefore a pressing issue.** Through its Global Gateway Strategy, the EU promotes high-quality, sustainable and transparent investments in infrastructure and connectivity worldwide. These include flagships, such as the Green Shipping Corridors project to promote the decarbonisation of maritime transport and the upgrade and renovation of major ports – particularly in Africa.

**Regional and bilateral approaches can help to reinforce thematic and global action where EU interests are strongest.** A coherent and strategic ocean and fisheries bilateral policy for a selected number of areas would contribute to achieving the EU's wider geopolitical goals by deepening/revisiting its bilateral relations with strategically important partners.

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129 C(2023) 4489 Final.

130 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 63.

131 Policy Support and Governance Gateway, FAO.

### 4.10 Combining energy transition, environmental constraints and the competitiveness of the EU's external fleet

Besides the above-mentioned structural risk of climate change for the availability of resources, the EU DWF's competitiveness needs to be factored in in the light of the energy transition and increasing environmental constraints. However, the EU DWF's net profit declined over the past decade while it remains a high-impact fleet for decarbonisation efforts. The question of how to change over to carbon-neutral energy sources is particularly challenging for this fleet due to the long distances it covers; the limited experiments available for this type of vessel and the size of the investments required; and the limited availability of alternative fuels in non-EU ports on which the DWF relies.

As part of the Communication on the Vision for 2040 for fisheries and aquaculture, the Commission has presented a long-term roadmap for the energy transition in the fisheries sector[132]. This roadmap has been informed by the intensive work of the Energy Transition Partnership for EU fisheries and aquaculture (including by the dedicated Working Group on the DWF[133]). One key conclusion is that it is necessary to **overcome the 'first mover problem' between stakeholders and authorities** to make the energy transition.

This is especially important at the international level, both economically and politically. The Commission[134] recognised the industry's concerns that the costs of investing in the energy transition should not put EU operators at a short-term disadvantage to competitors that operate under less demanding energy reduction policies and regulations. The Commission therefore committed to intensify its work in key international organisations (the OECD, IMO and FAO). Within the IMO, the EU advocated for greater ambition in the IMO strategy on reducing GHG emissions and for a combination of a global GHG fuel standard with a market-based measure for renewable, low and zero GHG-fuels. The recent adoption of the new targets for 2030, 2040 and 2050 could inject some new momentum into the decarbonisation of the fishing fleet in line with these targets. However, a strategy for aligning actions under the Energy Transition Partnership (the needs of the DWF) with the EU's action in the IMO (setting new standards or adapting existing ones) is necessary to gain a competitive technological advantage for the EU in carbon-efficient and carbon-neutral fishing technologies and vessels.

## 5 CONCLUSION

**The external dimension of the CFP that was set out in the 2011 Commission Communication and embedded in the 2013 CFP Regulation has largely achieved its objectives**[135]**.** The EU is building strategic partnerships with key third countries through RFMOs, SFPAs and other bilateral agreements. It has the most complete system in the world for certifying imported fishery products are free from IUU fishing. The EU's fleets have maintained a continuous presence in many RFMOs and bilateral access agreements. The EU's external action is contributing to a level playing field for EU operators. The coherence of EU policies has improved significantly.

**Despite this progress, major changes at global level and within the EU are renewed challenges.** Shifts in global power balances, increased competition for natural resources (including fisheries) and evolving trade relations have influenced access to fishing

132 SWD(2026) 752 final

133 Energy Transition Partnership – Maritime Forum – European Commission.

134 COM(2023) 100 final.

135 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), pp. 83, 86 and 89.



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opportunities, markets and inputs. Regional instability and conflicts have disrupted supply chains, affected fuel, energy and feed availability, and increased volatility in prices[136].

Brexit has resulted in a large portion of the Northeast Atlantic ceasing to be EU waters and becoming third-country waters. This shift has significantly changed practices in a context where the Commission must negotiate joint management measures on behalf of the EU in annual consultations and/or via the EU-UK SCF and where outcomes cannot be controlled in the same way as when only EU waters are concerned[137].

EU external fisheries retain access to non-EU waters, but this has not compensated for the overall shortfall in supply due to the slow recovery of EU stocks. The EU is therefore increasingly dependent on imports – especially the processing and fed aquaculture sectors that rely on imported raw materials and feed (fish meal and fish oil). This increases strategic and competitive vulnerabilities as well as level playing field concerns regarding imports from third countries that may be applying less stringent standards[138].

The CFP's external action has therefore gained in strategic importance. However, this must be carried out in a context of major sustainability concerns, where managing fisheries internationally has become increasingly complex and managing them sustainably has become even more challenging. Progress has been made, but IUU fishing remains one of the greatest threats to the sustainable use of fishery resources and combating this is hindered by a lack of transparency on key aspects (e.g. ultimate beneficial ownership and transhipments) as well as by weak compliance with core international agreements and RFMOs' management and monitoring decisions. International fisheries management is increasingly influenced by non-fisheries specialised forums. In the coming years, the international agenda will be marked by the implementation and negotiation of major agreements, such as the BBNJ agreement, that have a direct bearing on fisheries, and by the conclusion of strengthened partnerships between the EU and some third countries or groups of third countries in which fisheries/IOG would need to have a strong place.

The EU external fleet is facing significant challenges. Its profitability has substantially declined over the last decade. It is also made up of larger, more powerful vessels, whose emissions have increased and which remain highly vulnerable to increases in fuel prices. This is limiting the capacity to mobilise resources for investment.

The accumulation of crises in recent years combined with the need to accelerate efforts in marine protection and energy transition have together prompted all stakeholders to place renewed emphasis on the link between internal and external action[139]. They are calling for stronger action in regulating fisheries worldwide, the protection of the most vulnerable (local communities and small-scale fishers), improved import controls, and the use of trade and market measures to make EU imports more sustainable. They are also calling for strengthened strategic partnerships with key regions and countries to promote the implementation of key multilateral agreements, accompanied by adequate incentives and support. Difficult relations with some third countries and/or their unsustainable fishing activities are also a cause for strong concern. Stakeholders are explicitly or implicitly calling for country-specific, tailor-made and comprehensive strategies for these third countries.

136 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 86.
137 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 86.
138 Evaluation of Regulation (EU) No 1380/2013 (SWD(2026) 120 final), p. 88.
139 See Annex II.



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# ANNEX I
## INTERNATIONAL FISHERIES LEGISLATION AND STATE OF GLOBAL FISHERIES

### 1. INTERNATIONAL FISHERIES LEGISLATION

For a long time, access to fisheries resources outside the territorial boundaries of any country was free, according to the 'freedom of the sea' principle. However, the **United Nations Convention on the Law of the Sea (UNCLOS)**, which was adopted in 1982 and entered into force in 1994, fundamentally changed this situation by setting out the basic international legal framework for the conservation and management of marine living resources and defining the rights and duties of states regarding the use of ocean space and resources.

UNCLOS restricts free access to ocean resources by authorising the formal declaration of exclusive economic zones (EEZs) of up to 200 nautical miles from the coast. Coastal states have sovereign rights to explore and exploit the natural resources in their EEZs. UNCLOS also recognises the principle of freedom of fishing in the high seas (sea areas that lie beyond areas of national jurisdiction), accompanying it with an obligation to ensure the conservation of living resources. UNCLOS further provides that, for stocks occurring within the EEZs of two or more coastal states, those states must seek to agree on measures for managing such 'common' stocks.

UNCLOS only partially addressed one key issue: the management of straddling stocks (small pelagics and demersal stocks spanning over adjacent high seas and EEZs) and highly migratory fish stocks (tuna and tuna-like species that are found in several EEZs and international waters because of their migratory behaviour). An implementing agreement under UNCLOS, the **UN Fish Stocks Agreement (UNFSA)**, was therefore adopted in 1995 and entered into force in 2001. Under this agreement, the straddling and highly migratory stocks are to be managed by **regional fisheries bodies (RFBs)**, whose members are all the coastal states and other, distant, fishing states that claim a 'real interest' in the relevant fish stocks.

RFBs are intergovernmental organisations that facilitate international cooperation on the management, conservation and sustainable use of fishery resources within a given region or for specific fish stocks. They can be divided into two main types:

- **regional fisheries management organisations (RFMOs)**, which have the power to adopt internationally legally binding conservation and management measures within their area of competence;
- **regional fisheries advisory bodies (RFABs)**, which, unlike RFMOs, have a purely advisory role and no power to adopt legally binding measures.

**RFMOs** are the main vehicle for states with fishing interests to discharge their duty to cooperate in ensuring the conservation and sustainable use of marine biological resources. This concerns highly migratory stocks, straddling stocks and stocks located exclusively in the high seas. UNFSA stipulates that only members of the relevant RFMO (and any other countries that agree to apply the measures established by that RFMO) can access the fisheries resources in question. Membership is open both to countries in the region (coastal states) and to more distant states with an interest in the fisheries concerned (e.g. states that traditionally fished in these waters).

Two broad types of RFMOs can be distinguished: generic RFMOs (responsible for most of the fish stocks in a certain area) and species-specific RFMOs (responsible for the conservation of a particular stock or type of species) (Figure 18). Within the latter group, another distinction can be drawn between: (i) tuna RFMOs, which manage highly migratory species/stocks throughout their distribution range (their regulatory mandate generally includes both the high seas and EEZs); and (ii) non-tuna RFMOs, which manage species/stocks that are not highly



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migratory (their regulatory mandate is generally limited to the high seas). Membership can vary from fewer than 10 to more than 50 Parties and generally includes coastal states and long-distance fishing nations.

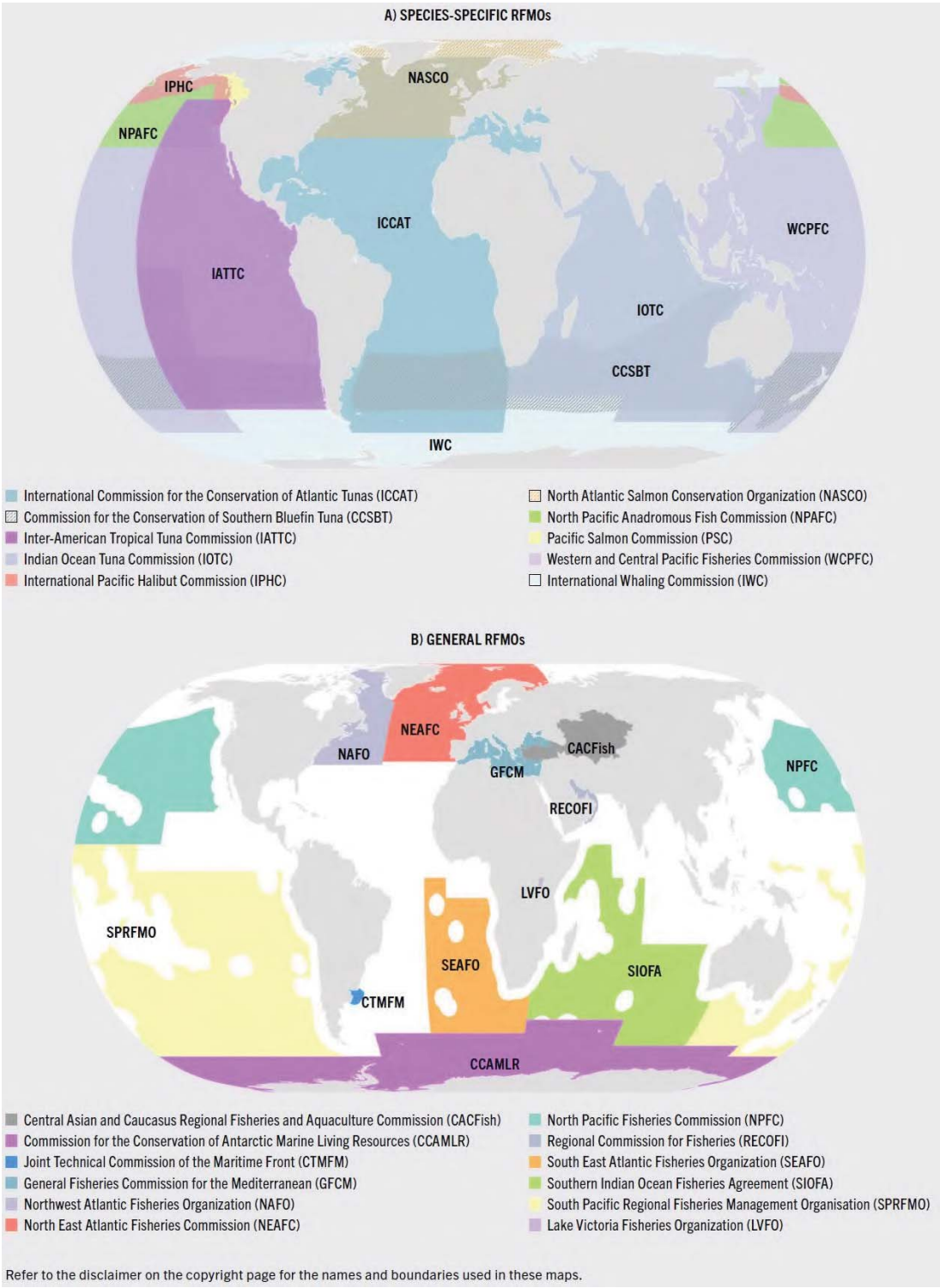



Figure 18 - Geographic coverage of the mandates of species-specific and general regional fisheries management organisations. Source: FAO, Review of the state of world marine fishery resources – 2026, p. 129.

The main governing body of a RFMO (often called a commission) generally decides on conservation and management measures by consensus during an annual meeting but some RFMOs take decisions by majority voting. Adopted decisions are binding on the Parties. They typically concern catch limits, vessel capacity limits, technical measures, spatial and/or

temporal fisheries closures, measures to limit the impact of fishing on the ecosystem, and monitoring activities to ensure compliance with rules.

RFMOs' conservation and management measures are based on advice provided by scientific committees or other technical bodies composed of experts from the RFMOs' members. The scientific advice is mostly based on fisheries-dependent data as well as independent data that has been collected and provided by their members. The implementation of the measures decided by the RFMO Parties is ensured by the flag and port states through a range of monitoring and control system tools and dedicated compliance-monitoring processes. RFMOs derive their financial resources from the compulsory and voluntary contributions of their members.

Two other implementing agreements under UNCLOS concern **deep-sea mining** (adoption in 1994, entry into force in 1996) and the sustainable use of **marine biological resources in areas beyond national jurisdiction** (adoption in 2023, entry into force on 17 January 2026 - also known as the BBNJ agreement or High Seas Treaty). The BBNJ agreement establishes a global framework for the conservation and sustainable use of marine biological diversity in areas beyond national jurisdiction. It addresses four key domains: marine genetic resources; area-based management tools; environmental impact assessments; and capacity building and technology transfer. The BBNJ agreement must not undermine existing relevant instruments, frameworks and bodies, such as the RFMOs that oversee 95% of fishing in areas beyond national jurisdiction. However, parties to the BBNJ agreement are required to promote its objectives in other relevant bodies, such as the RFMOs, and the BBNJ agreement requires enhanced cooperation to achieve its objectives.

International fisheries governance also includes a range of legal measures taken by the FAO. These include the **Compliance Agreement** (adoption in 1993, entry into force in 2003) and the **Port State Measures Agreement** (the PSMA; adoption in 2009, entry into force in 2016). The Compliance Agreement officially has 45 Parties, including the EU. It was a direct response to the problem of fishing vessels being reflagged to avoid their activities on the high seas being controlled. It enhanced the role of the flag state by ensuring that the Parties strengthened their controls over their vessels to guarantee compliance with international conservation and management measures. The PSMA targets IUU fishing by preventing vessels that have been identified as having engaged in IUU fishing from using ports and landing their catches.

Non-binding FAO guidelines include the **Code of Conduct for Responsible Fisheries** (1995) as well as related **international action plans** on sharks, fishing capacity, seabirds and IUU fishing. The FAO has also issued voluntary guidelines on the responsibilities of flag states (2014), small-scale fisheries (2014) and the marking of fishing gear (2018). The adoption of FAO voluntary guidelines for transhipment (2022) prompted flag, coastal and port States to pay more attention to the at-sea and port transhipment operations that require MCS tools to comply with the applicable conservation and management measures.

## 2. STATE OF GLOBAL FISHERIES

There is a wealth of international rules and frameworks to govern fisheries at the international level, but the state of fisheries resources remains critical at the global level. This is due to overfishing, pollution, the impacts of climate change, overexploitation of marine resources and pollution (plastics). The overexploitation of certain stocks and the impact of fisheries on ecosystems remain key challenges.

The FAO[1] notes both progress and challenges in fisheries sustainability worldwide. **The share of the world's biologically sustainable marine stocks dropped from** 64.5% of all stocks assessed by FAO in 2021 to 62.4% in 2023[2]. Among the biologically sustainable stocks in 2023,

[1] The following text presents key findings of FAO, The State of World Fisheries and Aquaculture 2026.

[2] The decline reflects both assessment revisions and the inclusion of new records.

46.9% were classified as maximally sustainably fished and 15.5% as underfished, the remaining 37.6% being overfished (Figure 19). The proportion of overfished stocks has been increasing by approximately 1% each year in recent times. However, when weighted by volume, 72.6% of the landings of assessed originated from sustainably fished stocks, down from 77% in 2021. This indicates that **stocks with larger landings tend to be more sustainably managed** and that effective management supports the recovery and long-term sustainability of fishery resources.

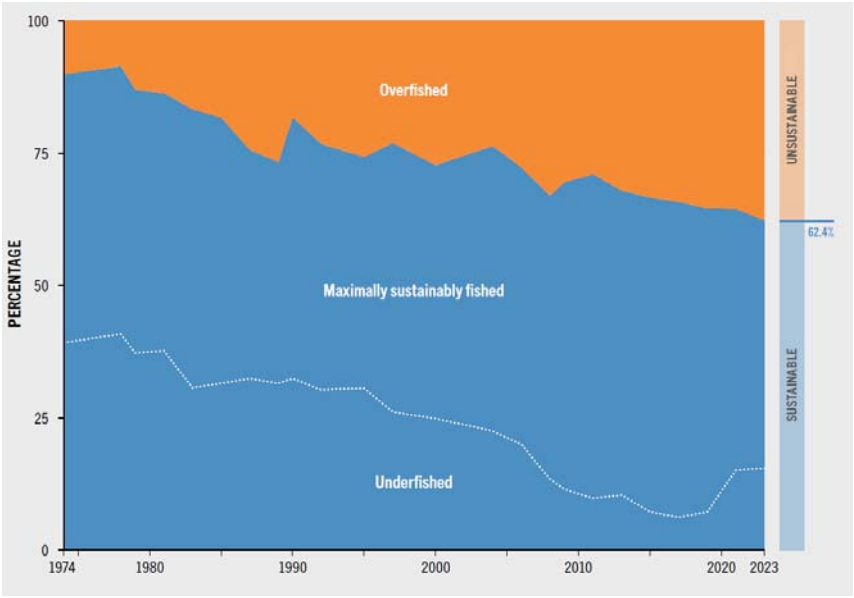



Figure 19 – Global trends in the state of the world's marine fishery stocks by number, 1974-2023. (Source: FAO, Review of the state of world marine fishery resources – 2026, p. 45).

There is considerable variation at **regional level** (Figure 20) continues. In 2023, several areas maintained high proportions of sustainable stocks, reflecting the continuous implementation of science-based management systems and precautionary harvest strategies. Conversely, areas subject to high fishing pressure, strong environmental variability or limited assessment and management capacity faced persistent challenges. Overall, high-latitude regions continue to maintain high sustainability levels due to well-functioning management systems. At the same time, improvements observed in certain areas, notably the Mediterranean and Black Sea (Area 37), Western Central Atlantic (Area 31), Northwest Pacific (Area 61) and Southeast Pacific (Area 87), confirm how science-based management can yield measurable recovery progress.

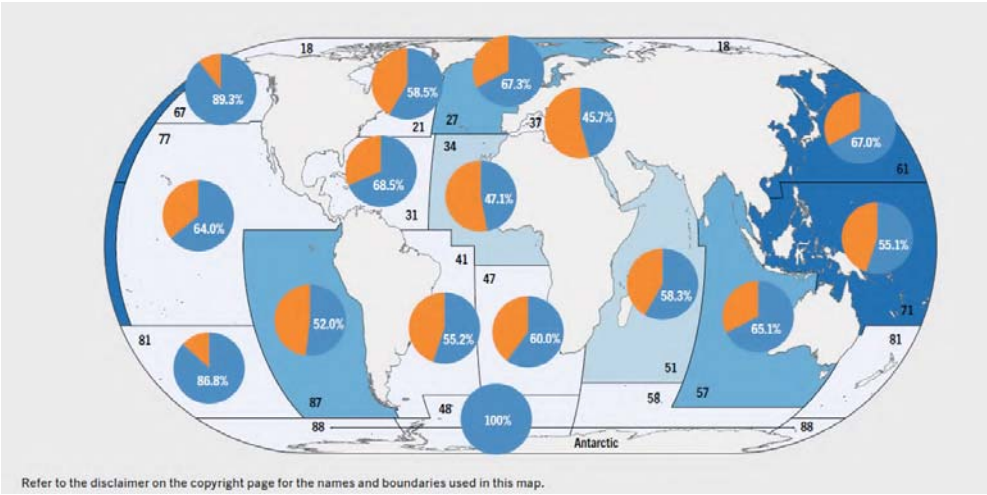



Figure 20 – Percentage of biologically sustainable and unsustainable fishery stocks in 2023 by FAO major fishing area and selected species groups. Source: FAO, Review of the state of world marine fishery resources – 2026, p. 47.

Regarding landings, since 1950, areas with landings oscillating around a stable value since 1990 (this is associated with the dominance of pelagic, short-lived species - Areas 61, 67 and 77), record the highest percentage of stocks at biologically sustainable levels (75%). By contrast, areas with a continuously increasing trend in landings since 1950 (Areas 34, 51, 57 and 71) and areas with an overall declining trend in landings following historical peaks (Areas 21, 27, 31, 37, 41, 47, 81 and 87) have the lowest percentage of stocks at biologically sustainable levels (59% and 61% respectively).

**There are strong variations between species.** The ten species with the largest landings in 2023, which together, for 21% of global production in 2023, 73.6% of these stocks (by stock number) or 76.5% (by volume of landings) were fished within biologically sustainable levels in 2023. This is higher than the global sustainability for all stocks in 2023, but down from 86% in 2021. The status of **tunas and tuna-like species** demonstrated the impact of strong management action: 91.3% of assessed tuna stocks were classified as biologically sustainable in 2023, and more than 99% of catches originated from biologically sustainable stocks. By contrast, **deep-sea fisheries** continue to face challenges. Their long lifespans make them particularly vulnerable. In 2021, only 29% of deep-sea stocks were being sustainably fished – except in the Antarctic Area, where 100% of exploited stocks were estimated to be sustainably fished. **Highly migratory sharks** are also under ongoing pressure. Of the stocks assessed, 60% were classified as biologically sustainable in 2023, the most assessed species, blue shark, being at 83.3% of assessed stocks classified as sustainable in 2023. Some are deliberately targeted, but most are caught as bycatch in longline fisheries. Highly migratory shark species have cross-jurisdictional ranges that require international cooperation to implement management measures and secure their conservation and sustainable use.

## ANNEX II
## STAKEHOLDER CONSULTATION – SYNOPSIS REPORT

This annex provides information on the overall consultation process that took place to inform the preparation of the EU Strategy for Fisheries External Action and reports the views of different stakeholder groups. Stakeholders were consulted in line with the 'Better Regulation Framework' in a transparent, meaningful and proportionate approach to consultation. This made it possible for the Commission to: (i) get useful feedback from a wide range of stakeholders; (ii) take the views of these stakeholders into account; and (iii) reflect these stakeholders' messages in the EU Strategy for Fisheries External Action, where relevant.

### 1. CONSULTATION STRATEGY AND ACTIVITIES

#### 1.1 Consultations on the common fisheries policy and call for evidence on external action

In 2024, the Commission launched an evaluation of the CFP Regulation. The evaluation covers the core instruments of the CFP's external dimension because the CFP Regulation is their legal basis. The call for evidence under the evaluation of the CFP Regulation (20 June 2024 – 6 September 2024) and the public consultation on the evaluation of the CFP (27 January 2025 – 21 April 2025) invited stakeholders and the public to provide their assessments of the CFP's achievements, including its external dimension. The results of these consultations are presented in a staff working document accompanying the Communication on the Vision 2040 for Fisheries and Aquaculture.

In 2024-2025, calls for evidence and public consultations were also carried out in the area of external trade as part of impact assessments on better protecting sharks through trade and the EU's autonomous trade quotas. Their results are relevant and have therefore been integrated.

In view of these other engagements with stakeholders, the call for evidence on the EU strategy for fisheries external action was delineated in such a way that it clearly complements these other consultations. It focused on the strategic objectives that the EU's future fisheries external action, should pursue in the light of current and future challenges and the best possible articulation of the EU instruments to achieve these objectives. Stakeholders were invited to share their views on how fisheries external action can combine a set of EU instruments and policies to (i) strengthen environmental sustainability; (ii) strengthen social sustainability; (iii) strengthen economic sustainability; and (iv) promote enhanced global fisheries governance and continue upholding the rules-based multilateral maritime order. The call was published on 7 July 2025 in all 24 of the official EU languages and was open for feedback for 10 weeks until 17 September 2025. Stakeholders were able to contribute in any official EU language.

The call received a total of 49 responses[1] (76% from EU respondents and 24% from non-EU respondents). These responses mainly originated from NGOs (42%) and from business associations and individual companies (28%). Regarding EU respondents, it is noteworthy that the main large EU industry associations and NGOs replied, as well as two Member States that

[1] Technical problems prevented one contribution being uploaded on the HaveYourSay portal. It was accepted by postal transmission instead.



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account for 37.7% of the EU's total fishing fleet by gross tonnage. The majority (58%) of the non-EU respondents were NGOs, but two replies came from the fisheries ministries of third countries.

### 1.2 Engagement with EU institutions, EU Member States and advisory bodies

In 2024-2025, informal meetings with Member States, Council conclusions and several European Parliament reports provided opportunities for engagement on the EU's future fisheries external action. Moreover, targeted consultations were carried out with advisory bodies and during major stakeholder events on EU fisheries and international ocean governance policy.

#### *1.2.1. Council of the European Union and Member States*

EU Member States have been involved throughout the process. Several provided contributions in response to the various calls for evidence and consultations mentioned above.

In 2020-2025, the Council adopted several conclusions that address the external dimension of the CFP and EU fisheries external action. In 2020, the Council Conclusions on the Farm to Fork Strategy linked fisheries policy to sustainability and trade, while the Council Conclusions on Biodiversity – the need for urgent action underlined the relevance of global marine biodiversity and global governance for fisheries. In 2022, the Council Conclusions on International Ocean Governance focused strongly on sustainable fisheries outside the EU's waters and were reinforced by the Council Conclusions on the Fisheries Policy Package, which called for continued and strengthened work on sustainability at the international level.

It is important to underline the Council's role in preparing the EU's positions in international negotiations for informing the EU's policy agenda for fisheries external action. The Council must adopt an EU position before every EU engagement in an international organisation or agreement relating to fisheries, trade and biodiversity. These Council discussions have therefore provided many opportunities to identify key challenges and opportunities that can be addressed through an effective EU fisheries external action.

In 2025-2026, specific substantive discussions on the objectives and key issues for the future EU strategy were held in several meetings of the two main Commission expert groups for CFP (the Expert Group for Fisheries and Aquaculture and the Expert Group for Markets and Trade in Fishery and Aquaculture Products), informal meetings of the national senior officials in charge of fisheries and at several formal and informal sessions of the Council.

#### *1.2.2. European Parliament*

The European Parliament (EP) has regularly stressed the importance of the CFP's external dimension and EU action to promote sustainable fisheries at the international level. The EP has from an early stage supported an ambitious EU global fisheries agenda and played an important role in raising its public visibility.

In particular, in 2024, the EP Resolution on the Implementation of the Common Fisheries Policy and Future Perspectives reviewed the CFP's external dimension and called for a stronger role in RFMOs and improved SFPAs, while the EP Resolution on the EU Action Plan: Protecting and Restoring Marine Ecosystems for Sustainable and Resilient Fisheries addressed global biodiversity and ocean governance and its links to the internal and external fisheries policy of the EU. Previously, in 2022 and 2023, the EP focused on two specific aspects. The EP Resolution on the Future of Fisheries in the Channel, North Sea, Irish Sea and Atlantic Ocean post-Brexit focused on post-Brexit external fisheries relations and access to waters. The



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EP Resolution on the Implementation of Article 17 of the CFP and the EP Resolution on the Small-Scale Fisheries Situation in the EU and Future Perspectives were concerned with the fair allocation of fishing opportunities (including under external agreements) and a better integration of small-scale fisheries in external agreements. Finally, in 2026, the EP adopted the Resolution on The role of ocean diplomacy for the competitiveness of EU fisheries and aquaculture. This addressed a wide range of issues pertaining to EU fisheries external action in the context of a more effective ocean diplomacy.

The exchanges leading to these own-initiative resolutions of the EP provided opportunities to inform the preparation of the EU Strategy for Fisheries External Action by spurring a shared understanding of the global challenges and the role and aims of the EU in addressing them.

This was supplemented by the regular reports and exchanges (especially with the EP's Committee on Fisheries) on the ongoing negotiations and implementation of international agreements (particularly SFPAs, RFMOs, the fight against IUU fishing and the BBNJ agreement). Other meetings with MEPs and EP staff helped develop a good understanding of the current situation and challenges.

The EP has also commissioned two studies on The EU oceans and fisheries policy: Latest developments and future challenges (2024) and Fishing outside the European Union: The external dimension of the common fisheries policy in-depth analysis (2025). These studies provided a timely contribution to the discussion of the main challenges facing the EU's fisheries external action.

#### *1.2.3. The European Economic and Social Committee and the Committee of the Regions*

The European Economic and Social Committee (EESC) has adopted several opinions that are internationally relevant. In its 2023 opinion on the Action plan to conserve fisheries resources and protect marine ecosystems, the EESC called for consistency between internal and external policies and for fair competition between EU and non-EU operators. In its 2025 opinion on the Ocean Pact, the EESC supported a comprehensive European Ocean Pact, which would strengthen the EU's position in international negotiations related to the ocean (particularly on an agreement on fisheries subsidies in the WTO) through global leadership and diplomacy and using the EU market to improve environmental and social standards globally.

The EESC has also paid attention to specific geographic areas. In an opinion on Conservation and control measures applicable in the North-East Atlantic fisheries (2023), the EESC advocated enhanced conservation and control measures under regional conventions, with an emphasis on compliance and sustainability. The EESC's opinion on General Fisheries Commission for the Mediterranean (2024) called for stronger cooperation on, and greater sustainability for, Mediterranean fisheries. Furthermore, in 2026, the EESC contributed, in partnership with the Long-Distance Advisory Council (LDAC), to a multistakeholder workshop on the new generation of SFPAs.

The Committee of the Regions has addressed the EU's fisheries external action in the context of opinions on The Common Fisheries Policy on the ground: towards sustainable and resilient coastal communities in the EU (2023) and the EU Oceans Pact (2025). These opinions emphasise the need for stronger ocean governance at the EU and global levels, the importance of a framework for fair competition, the strategic role of fisheries in the food value chain and the application of EU standards to products entering the EU market.

### 1.3. Engagement with stakeholders

By far the bulk of stakeholders' input was submitted as part of the regular activities of the advisory councils (ACs), which are the institutionalised consultation channels between the Commission and the EU fisheries stakeholders. In 2020-2026, all the ACs delivered a large number of recommendations on the EU's fisheries external action. The LDAC is the primary policy driver on external fisheries, but other councils (e.g. the Market Advisory Council (MAC) and regional ACs) also contributed complementary perspectives.

The Commission has also engaged with civil society organisations by attending workshops and meetings initiated by some ACs, the Sea Fisheries Sectoral Social Dialogue Committee and the EESC. In March 2025 and March 2026, the Commission carried out two important public events in the context of the Ocean Days. The Commission has also met bilaterally at various levels with civil society representatives as well as with the private sector upon request.

## 2. RESULTS OF THE CONSULTATION

This section summarises the messages received from stakeholders during the preparatory process. The overall feedback obtained from the call for evidence showed a strong consensus on the fundamentals for future objectives and guiding principles of the EU's fisheries external action. However, concrete actions and nuances in positioning can be found in other types of contributions (primarily the advice of the ACs in 2020-2025 as well as the resolutions of the EU institutions).

### 2.1. The need for a stronger fisheries external action

The public consultation on the evaluation of the CFP Regulation covered various international issues[2].When assessing the CFP Regulation's effectiveness in achieving environmental, economic and social goals at the international level, approximately half of the respondents assessed its contribution to international ocean governance as positive or very positive. The CFP was also viewed positively for having helped to keep stocks at healthy levels and having contributed to healthy marine ecosystems.

Regarding the efficiency of CFP policy tools with an international scope, the role of the EU in international and regional fisheries management agreements and SFPAs was assessed as positive. The EU's role was assessed as mildly positive as regards the management of stocks shared with third countries. However, very high 'no opinion' shares reflect low familiarity with the issues. By contrast, allocation of fishing opportunities was rated relatively negatively in terms of economic and social outcomes, reflecting domestic distribution tensions.

Concerning effectiveness in reaching environmental, social and economic sustainability, the strengths of the CFP's external action were seen in terms of reliance on scientific advice and contribution to healthy marine ecosystems. Shortfalls concerned the management of international/shared stocks: only ~17–21% saw the system as effective (~40–45% selected 'no opinion/unfamiliar').

The EU fisheries international action remained relevant for a majority (64%), but its coherence was considered insufficient. This was rated differently for different topics. Respondents considered that the CFP was mostly coherent with the protection of biodiversity, promoting IOG, the FAO orientations on fisheries and the UN SDGs. However, coherence was assessed

[2] Report on the CFP regulation public consultation, 2025.



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as weaker for FAO guidance on sustainable aquaculture and the BBNJ agreement (with a high proportion of 'no opinion' responses). It was seen as mostly incoherent on climate change and sustainable and fair trade.

### 2.2. Consensus on challenges

The answers to the public consultation on the evaluation of the CFP Regulation (Figure 21) identified unfair competition as the primary challenge. This was linked to imports of products produced under lower standards and to weaknesses in third-country fleets resulting in IUU fishing. Food security and market unpredictability were widely considered to be important. 'Lack of predictability of fishing opportunities' also scored highly. Geopolitics (Brexit, COVID-19 and Russia's full-scale war of aggression against Ukraine) were cited as external shocks that were destabilising profitability and predictability. Stakeholders called for stronger global enforcement, transparent bilateral agreements, oversight of EU vessels outside EU waters and effective sanctions against IUU fishing to restore fairness.

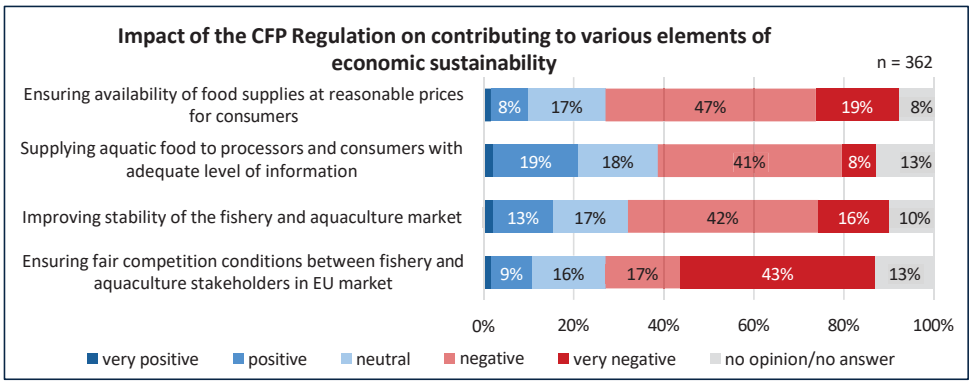



Figure 21 – Source: Report on the CFP regulation public consultation, p. 23.

As regards the EU institutions, the EP's successive resolutions have outlined the following challenges: ensuring consistency between internal and external CFP objectives while maintaining the socio-economic viability of fleets and coastal communities; post-Brexit adjustments to access and quota allocations with third countries in the North-east Atlantic; combating IUU fishing globally and closing loopholes in control and market measures; balancing environmental protection with food security, energy transition and employment; and strengthening enforcement and conditionality linked to social and human rights.

### 2.3. A call for an overarching EU strategy

In 2020-2026, the EU institutions repeatedly adopted positions on EU fisheries external action. Both the EP and the Council support the development of a new EU strategy for fisheries external action. Council conclusions have focused on operational and diplomatic coordination. The EP tends to adopt a more normative and rights-based approach and calls for a comprehensive strategy that aligns the environmental, social and economic pillars; enhances the EU's ocean diplomacy; and ensures that imports do not undercut EU sustainability standards. The EP's resolutions have collectively called for a coherent approach between SFPAs, RFMOs and trade instruments, with stronger traceability and labour clauses. They also call for enforcement and transparency; demand the explicit inclusion of small-scale fisheries in external agreements; and call for binding sustainability and human rights clauses.

The ACs also call on the EU to reassert its leadership and strengthen the coherence of its external action with a whole-of-the-EU external toolkit that aligns SFPAs, IUU dialogues, trade, development assistance and science cooperation; ensures predictable funding in the next

MFF; synchronises internal and external measures (e.g. RFMO transposition, multiannual plans for stocks shared with third countries and import market controls) to avoid unintended competitive disadvantages for EU fleets; strengthens and connects institutions; and ensures consistent enforcement at home and abroad to preserve the EU's credibility.

### 2.4. Widely shared objectives

The responses to the call for evidence show that there is general agreement across stakeholder categories on the need for a rules-based, science-driven external fisheries policy that strengthens RFMOs; combats IUU through traceability and transparency; and upholds social as well as environmental standards.

The ACs' opinions reflect the strong consensus on environmental sustainability and combating IUU fishing; show an increasing emphasis on global supply chains and the importance of a level playing field; and demonstrate increasing attention to social standards. ACs have also increasingly focused on climate-resilient fisheries policies; the transparency of fishing agreements and joint ventures; integration with EU development and trade policy; and the geopolitical dimension of fisheries. Despite the variations in emphasis due to the ACs' varying mandates, there is consensus across ACs and among all types of AC stakeholders that the EU should pursue the following core objectives: sustainable exploitation and biodiversity conservation; promoting a rules-based maritime order and strengthening global ocean governance; combating IUU fishing; and ensuring a level playing field in global markets.

Regarding the EU institutions, both the EP and the Council have very similar views on sustainability, governance and fair trade in fisheries. They particularly agree on the need to make sustainability a core principle in external fisheries policy; emphasise the EU's leadership role in IOG (especially through strong engagement in RFMOs and multilateral processes); ensure a level playing field in seafood trade by aligning import standards with EU sustainability rules; prioritise the fight against IUU fishing; use SFPAs as key instruments; adapt external relations to reflect the post-Brexit situation; and ensure consistency with broader EU strategies and sectoral initiatives.

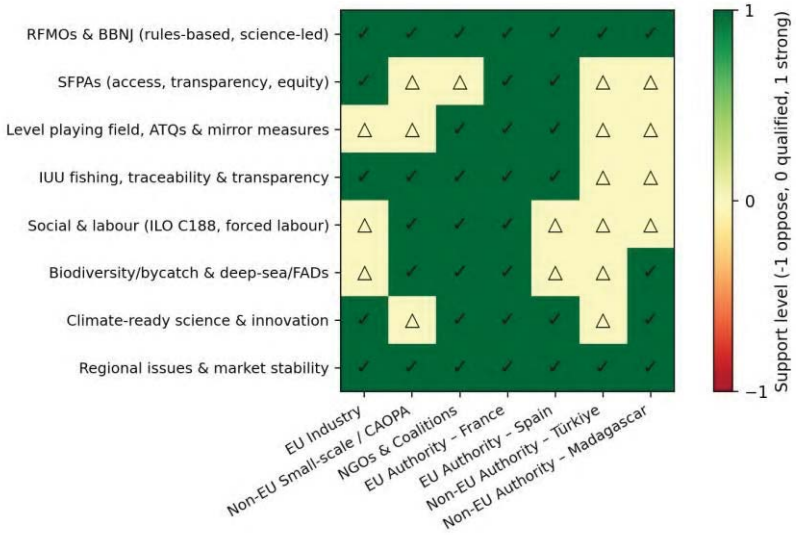
### 2.5. Nuances regarding the policy toolbox

When asked about the use of policy instruments to strengthen the three dimensions – environment, economic and environmental – of sustainability and fisheries governance, fault lines arise among stakeholders on how to operationalise these goals.

Overall (Figure 22), the NGOs pushed for faster precautionary action, mirror measures and full transparency. EU industry prioritised the need for a workable level playing field, predictability and avoiding over-transposition that could undermine EU fleets and supply. Public authorities (only four responded) were broadly in agreement with these approaches but had different priorities among themselves on: mirror measures and consistency between different EU tools; scientific leadership and control credibility; equal partnership and inclusive decision-making with third countries; promoting climate-integrated science in RFMOs; technology transfer; and flexibility when the EU needs to take precautionary measures.



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***Legend: ✓= strong support/emphasis △ = qualified/mixed position ✗= oppose (not observed in this sample)***

Figure 22 – Who said what in the call for evidence on the future EU strategy on fisheries external action

Focusing on the key objectives reveals nuances in positioning and policy tensions, both in the call for evidence and in the analysis of ACs' positions.

**To foster environmental sustainability**, re-anchoring external action in science and rules while factoring geopolitics and food security is a broadly shared objective. There is wide agreement on the need to defend the rules-based order (UNCLOS, PSMA and WTO) and apply the IUU carding system consistently (without geopolitical bias). Many industry respondents called for food security, strategic autonomy and a level playing field to be made explicit principles of external action.

All camps also underscored the importance of science-based management as the non-negotiable baseline internationally; the need to avoid politically driven decision-making; and a growing emphasis on climate-ready approaches. Regional ACs placed a particular emphasis on development and the systematic use of scientific advice. All ACs called on the EU to lead by example in RFMOs. More specifically, the ACs recommended putting forward and supporting measures on real-time monitoring of vessels, IUU listings and observer schemes; institutionalising harvest strategies across RFMOs and shared stock arrangements; and ensuring that TACs follow the best available science. Regulation (EU) No 1026/2012 should be activated as a backstop when repeated unilateral quotas threaten stocks.

There was also a general recognition that biodiversity protection and bycatch reduction must improve. There were also general calls for the promotion of ecosystem-based fisheries management that pays particular attention to non-target species, bycatch-mitigation through selective gears, area-based tools and biodiversity-friendly practices that are consistent with the targets of the CBD.

The call for evidence nevertheless revealed that the stakeholders had differing positions on several topics. First, on speed of change and burden-sharing, NGOs and science actors pushed for faster climate integration and a precautionary approach; the industry asked for predictable transitions and resourcing. Second, NGOs emphasised the importance of deep-sea protection, climate-ready management and BBNJ/RFMO consistency in implementing the BBNJ agreement; industry argued for case-by-case, science-based approaches and cautioned against measures that outpace science or create asymmetries between EU and non-EU operators. Third, on the management of fish aggregating devices (FAD), NGOs called for stronger limits or bans

and stricter compliance in the Indian Ocean; tuna industry representatives pointed to observer coverage, FAD control and certification, warning against blanket measures that undermine supply. Fourth and finally, NGOs called for the scaling-up of electronic monitoring and fleet observers to 100% in high-risk fleets and transhipments.

**To foster social sustainability**, there was general support for raising global social standards in the competent international organisations by promoting the implementation of major agreements (e.g. ILO Convention No 188 and the IMO Cape Town Agreement). There was also a general call to operationalise the EU's Forced Labour Regulation with sectoral guidance, risk-based enforcement and support for partner countries and SMEs. However, views varied on the question of where to embed requirements. Some industry respondents warned against including social criteria into ATQs for fear of distortion/complexity. They instead preferred horizontal instruments on due diligence and a ban on products made with forced labour. NGOs called for binding social provisions in trade regimes and SFPAs, and for harmonised enforcement. The LDAC also proposed explicitly prohibiting forced labour and child labour in seafood import regimes and SFPAs, and promoting EU labour standards in non-EU fleets' operations tied to EU markets.

Proposals on social responsibility focused mainly on SFPAs. Stakeholders called for the promotion of inclusive governance (representation of small-scale fisheries, women's participation) and for social dialogue in negotiations and SFPA governance. They stressed the need to ensure a fair distribution of benefits in partner countries; allow EU co-investment in third-country ports that benefit local communities; and acknowledge the role of responsible joint ventures where governance safeguards exist.

**To foster economic sustainability** and the competitiveness of the EU fleet, the stakeholders were generally agreed on the need to safeguard the EU's food security and strategic self-sufficiency through stable access to external fishing grounds and resilient value chains. Industry also called for streamlining and simplifying the administration of the external fleet (licensing and renewals).

To secure predictable access to fishing grounds, different stakeholders emphasised different instruments for different geographic areas. In the Northeast Atlantic, there was a strong call to ensure that management plans are recognised in all areas and by all parties (EU-Norway-UK) and to prioritise comprehensive allocation settlements where unilateral quotas risk overshooting TACs. Many stakeholders and several ACs called for activating the measures set out in Regulation (EU) No 1026/2012 to deter non-cooperative behaviour. Regarding the 'new generation' of SFPAs, there were many calls to retain SFPAs as transparent access frameworks; to tighten conditionalities on good governance and human rights, social clauses and transparency on sectoral support; to improve scientific baselines; to recognise the role of SFPAs in food security; and to ensure equitable value-sharing with partner countries. Some respondents recommended focusing SFPA sectoral support on science, monitoring and control systems and value-chain upgrading.

Building resilience and food security was the other aspect most cited by the respondents in connection with supporting economic sustainability. There were calls to cushion exogenous shocks along the value chain, while keeping the internal market open to legally and sustainably produced seafood. Some stakeholders called for targeted public support to mitigate energy/feed spikes and accompany working capital investments. Other stakeholders referred to the EU's outermost regions and called for recognition of low-impact tuna fisheries and protection from unfair competition from large third-country fleets operating nearby.



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**Trade and market instruments** were widely called for to ensure both fair competition and sustainability across global supply chains. There was a broad consensus on the need to use EU market access to raise standards on traceability, labour rights, forced labour ban and PSMA implementation. There were nevertheless some differences of views: industry urged the use of market levers to deter unilateral overfishing; NGOs warned that trade tools should remain coherent and non-discriminatory, focusing on verifiable risk and transparency; and importers stressed the need for pragmatic, phased-in requirements and capacity-building to avoid supply disruptions. There was general support for introducing sustainability conditions into ATQs, but some specific measures were advanced by only a minority of stakeholders: conditioning ATQs and trade preferences on compliance with RFMO rules and international labour standards; and introducing 'mirror measures' in trade regimes (i.e. equivalence of environmental/social requirements between imports and EU products; or requiring eco-labelling for imports).

There was consensus both on the need for enhanced and rigorous import controls to make the EU import-gate watertight against IUU fishing and social abuses, and on the importance of implementing CATCH full digitalisation by January 2026 to harmonise Member States' risk-based checks. More generally, electronic documentation within the EU market should ensure the full traceability of products at all stages of the value chain and consumer information should be strengthened (species/origin for processed products) to reduce fraud and reward sustainable value chains.

**To strengthen global fisheries governance**, there was agreement on a set of principles: (i) upholding a rules-based multilateral order (with a focus on UNCLOS, UNFSA, PSMA, BBNJ agreement and the WTO Subsidies Agreement) and enhancing EU ocean diplomacy to align fisheries, biodiversity and trade agendas; (ii) improving RFMO performance; (iii) the importance of the BBNJ agreement and the EU's role in its implementation (including within RFMOs); and (iv) acknowledging regional pressures in the North-east Atlantic and the need for stable arrangements and science-based governance.

Key recommendations generally called for consistency between EU internal standards and external positions and strengthened EU coordination across policy areas. The LDAC stressed the need for coordination with development, environment and trade policies, as well as transparency requirements for fisheries agreements with third countries and joint ventures. NGOs and the LDAC pointed to capacity-building in third countries to support a just transition toward climate adaptation and the upgrading of fisheries control. There were also some proposals for stakeholders to be included at all stages from design to decision (e.g. institutionalising AC input to the EU-UK SCF and RFMO preparation phases; ensuring the participation of small-scale fisheries, women and youth; and protecting observers' safety at sea).

**In conclusion, there are four recurring policy tensions** behind an overall strong consensus on key objectives: (i) access vs sustainability: balancing fishing opportunities with conservation objectives; (ii) EU standards vs global realities: ensuring high standards without disadvantaging EU operators; (iii) trade openness vs regulation: balancing market access with sustainability requirements; and (iv) short-term economics vs long-term resilience, particularly in climate and stock management.