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Policy options for strengthening the competitiveness of the EU fisheries and aquaculture sector

The EU fisheries and aquaculture products (FAPs) market is largely dependent on external producers. This study gives an overview on existing competitiveness indicators. It shows main trends in the EU's FAPs supply through extra-EU imports and identifies the main internal and external factors affecting the sector's competitiveness. The research presents an assessment of options for adaptations to the internal and external policy framework. Finally, it provides a series of recommendations for strengthening the competitiveness of the EU fisheries and aquaculture sector in the future, add value and differentiate its products from foreign competitors.

Main observations

The EU market for fisheries and aquaculture products is the largest in the world and is particularly attractive to

non-EU producers. It is argued that the EU fisheries and aquaculture sector has lost competitiveness to external operators who enjoy competitive advantages. Although external competition is not bad in itself, there is evidence that some FAPs are imported from countries where resource and social sustainability measures are not applied to the same extent as in

the EU, which does not provide a level playing field for EU producers. Policy action is therefore needed to address this situation at both EU and international level in the framework of fishing agreements and international fora. Internal factors that may have contributed to the current situation are: uneven control capacity in customs in some Member States, restricted

access to areas and resources, lengthy administrative procedures, costly fisheries and aquaculture operations, limited use of structural funds and lack of generational renewal. External factors affecting fair competition include: IUU fishing activities, uncooperative fisheries management, subsidies, lenient conservation, food safety, labour regulations and trade aspects. The EU has limited power to encourage sustainable practices among fisheries and aquaculture producers that operate under the sovereign decisions of their respective governments. However, it can grant access to its market only to FAPs that meet EU standards.



Policy recommendations

Based on the evidence reviewed, a number of general policy recommendations are set out below:

Access to the EU market:

- Ensure greater uniformity in the **application of customs** controls in all Member States to prevent access of **non-EU products** that do not meet EU standards.

The study

identifies the internal and external factors that may determine the competitiveness of the EU fisheries and aquaculture sector.



Access this note

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- **A label should be created for FAPs from non-EU countries**, to distinguish between EU and non-EU FAPs. It should also be made compulsory to label FAPs with the name of the country under whose flag the vessel operate.
- Strengthen **coordination between the EU's trade and fisheries policies**, in particular when negotiating trade agreements.
- The programme of **inspections in non-EU countries should be improved** by increasing the number of inspections carried out abroad.
- Improve the **collection of trade data** from non-EU countries for traceability purposes, and investigate **production methods** in exporting countries.
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- Strengthen safety and **hygiene measures for pangasius** and similar non-EU products.
- It is essential to analyze the **economic and social impact** of Free Trade Agreements (FTAs) on the EU fisheries and aquaculture sector.
- Consider **whether small pelagic species** should be **excluded from ATQ schemes**.
- **Renegotiate access to UK waters**, particularly in the light of the post-2026 situation.
- Benchmark the experience of Norway with **licensing schemes** in aquaculture.
- Member States should be signatories to all international agreements on **decent working conditions** in the sector.
- Reactivate **cooperation with China** through the Blue Partnerships and the fight against IUU fishing.

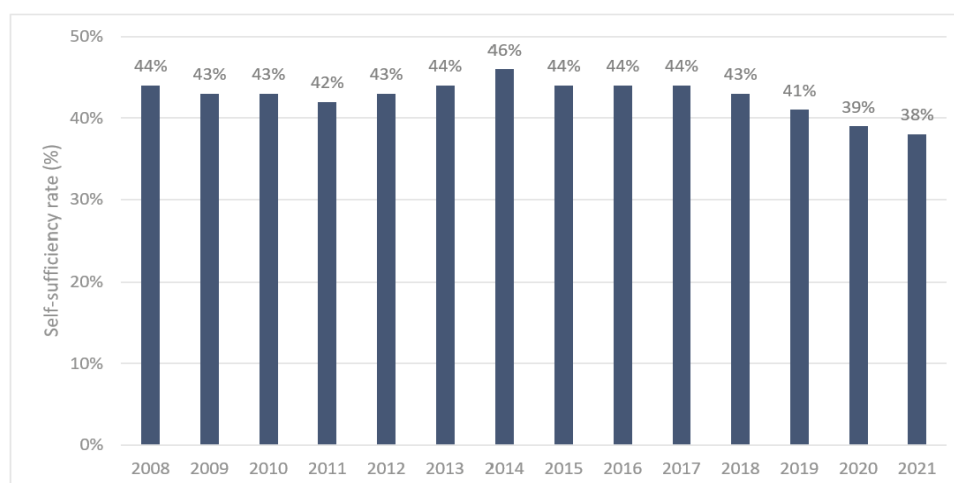
EU's structural support to competitiveness:

- Encourage the comprehensive use of **EMFAF resources** to enhance the competitiveness of the fisheries and aquaculture in terms of human capacities, markets, and added value.
- Maintain some **state aid framework** to adjust to the ongoing geopolitical unrest due to the level of energy prices.

International agreements and relations:

- **New Sustainable Fisheries Partnership Agreements (SFPAs)** should be signed to reduce the dependence on imports.
- Explore the possibility of a **mixed SFPA** to provide greater legal certainty for EU fishing companies operating in the **Falklands**.

Figure 1: EU's self-sufficiency rate for fisheries and aquaculture products (FAPs) in %, 2008-2021



Source: Own elaboration based on EUMOFA (2022)

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