



Reform of the Market Policy for fisheries and aquaculture products

Seminar Italy 'Fisheries and aquaculture in the EU'



**European
Commission**
Maritime Affairs
and Fisheries

The Market Policy in the new Common Fisheries Policy

- **Why a Market Policy ?**
- **Consultations and Methodology**
- **The European market for fisheries and aquaculture products**
- **The four axes of the new Market Policy**



Why a Market Policy ?

- **General Objectives**
 - To guarantee a fair income to producers
 - To promote price stability
 - To ensure supply of the EU processing industry while respecting the interest of EU producers
 - To strengthen competitiveness of all actors of the supply chain
 - To convey proper information to the consumer
- **The Market Policy will replace the current « Common Market Organisation » (CMO) (Reg 104/2000)**
- **The Market Policy is designed to contribute to the CFP's general objective of seeking sustainable fisheries**



Consultations and methodology

- **Green paper on the reform of the CFP (April 2009)**
- **Evaluation of the Common Organisation of the Markets in Fishery and Aquaculture Products (Dec 2008)**
http://ec.europa.eu/fisheries/documentation/studies/study_evaluation_market/index_en.htm
- **Study on the supply and marketing of fishery and aquaculture products in the European Union (May 2009)**
http://ec.europa.eu/fisheries/documentation/studies/study_market/index_en.htm
- **Study on political options and scenarii for the reform of the Market Policy (*ongoing*)**



Thematic seminars

- **Price formation and marketing of fisheries and aquaculture products (December 2009- Brussels)**

http://ec.europa.eu/fisheries/news_and_events/events/price_seminar/index_en.htm

- **Promotion of fishery and aquaculture products (April 2010 – Madrid)**

http://ec.europa.eu/fisheries/news_and_events/events/seminar_140410/index_en.htm

- **Supply to the EU market (April 2010 – Madrid)**

http://ec.europa.eu/fisheries/news_and_events/events/seminar_150410/index_en.htm

- **Reform of the Market Policy (July 2010 – Brussels)**



EU supply balance for fisheries and aquaculture products

In volume: 13 millions tonnes in equivalent live weight (food use only)

EU Supply balance or apparent Consumption = EU Production + Imports – Exports

Production = 6 million tonnes

Imports = 9 million tonnes

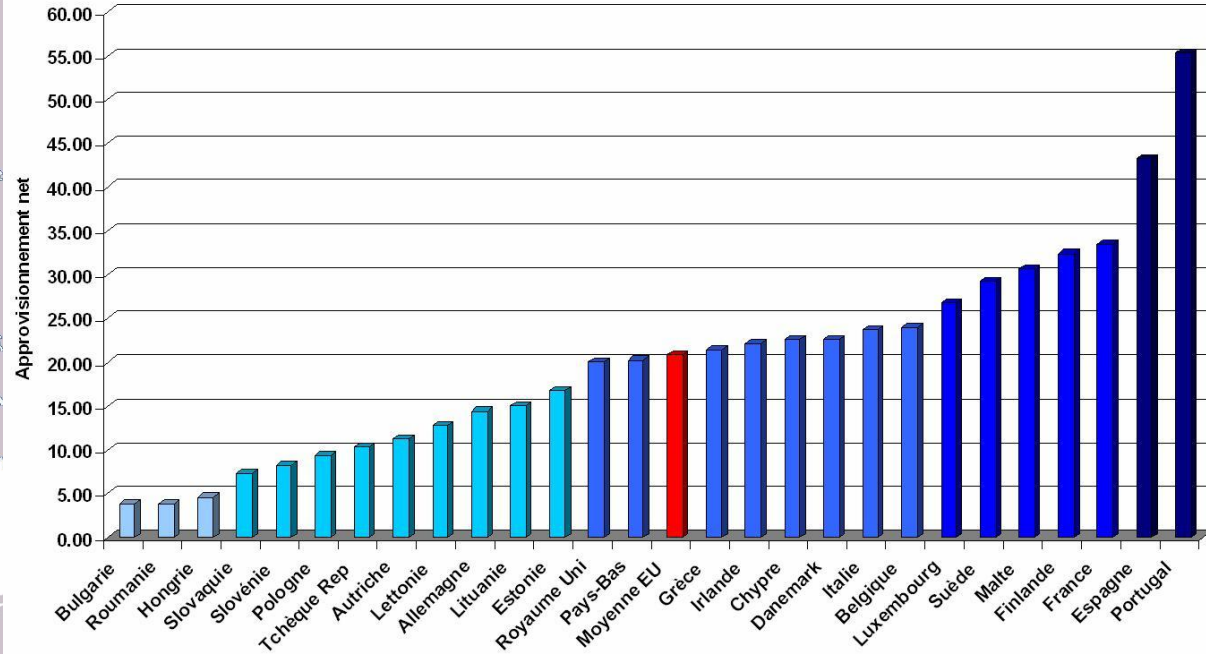
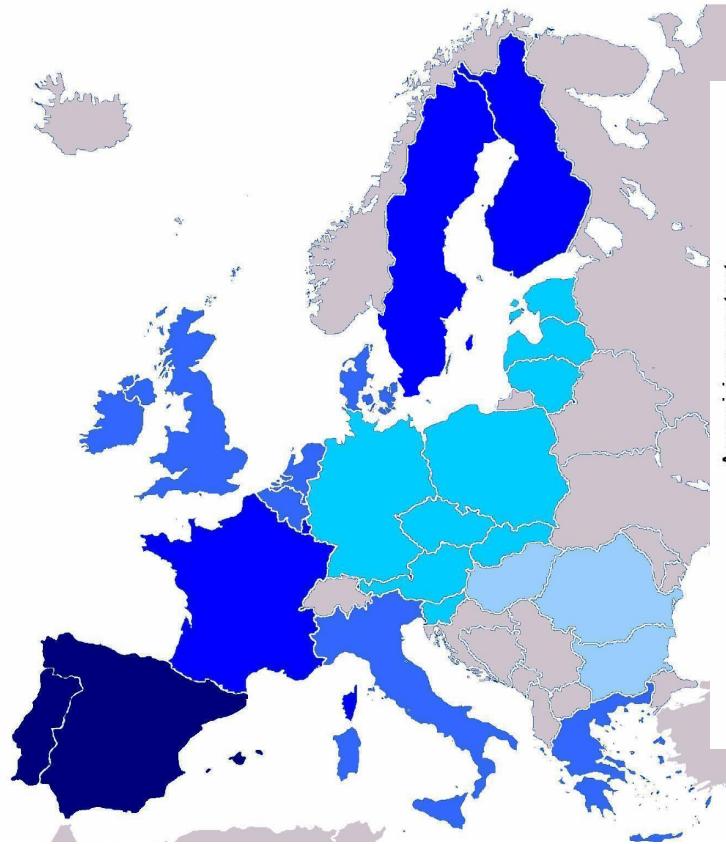
Exports = 2 million tonnes

In value: 55 billion €

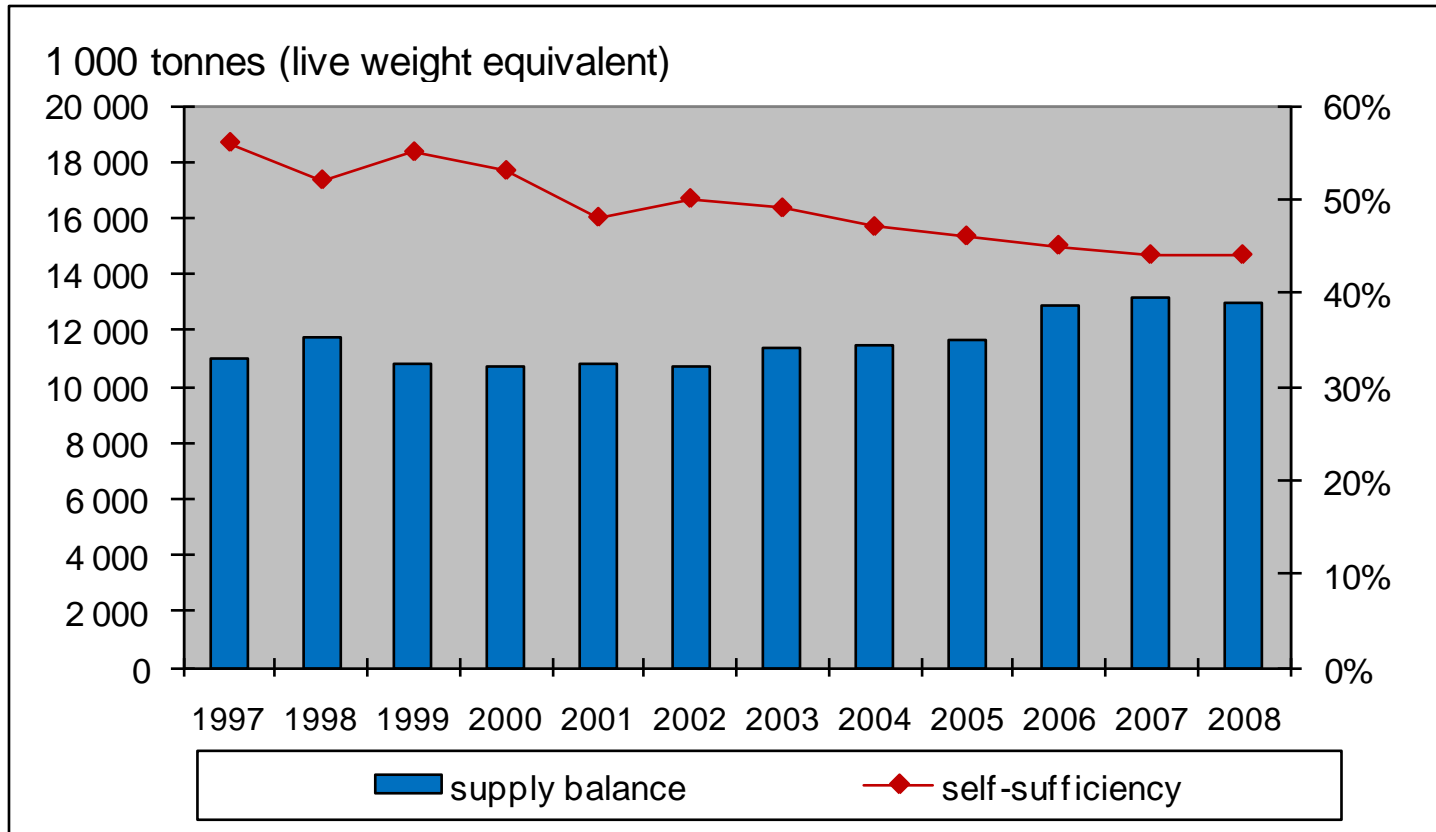
The first market in value ahead of the USA, Japan and China (China is the first in volume)



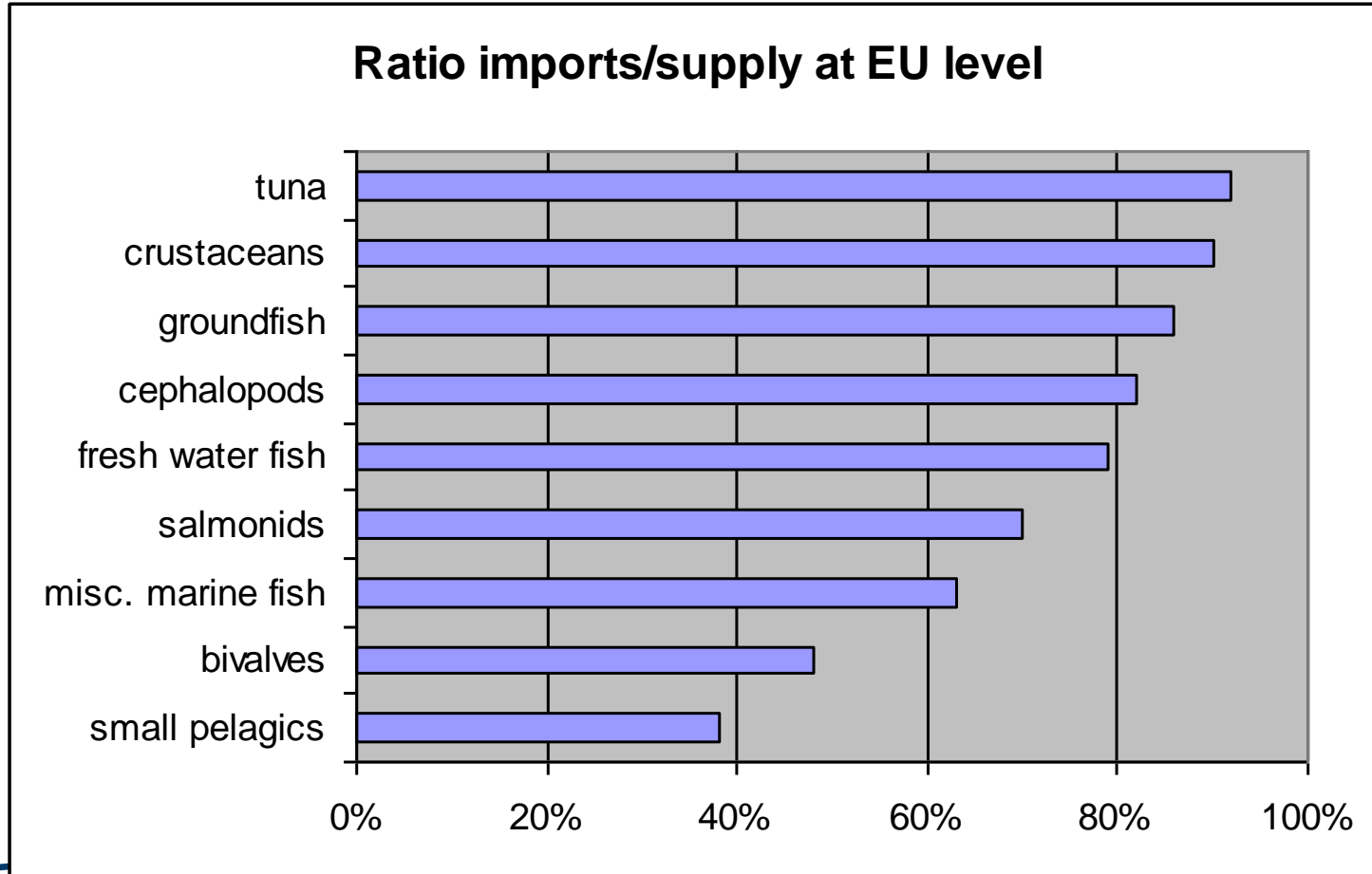
Heterogeneous consumption habits in the EU



Dynamic growth, but decreasing self-sufficiency



A strong dependency on imports

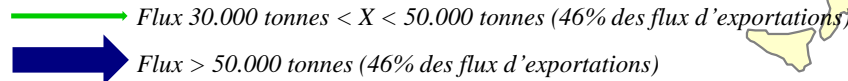
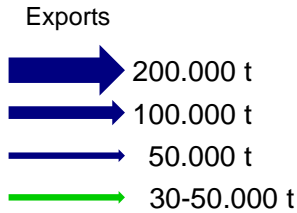


An integrated internal EU market

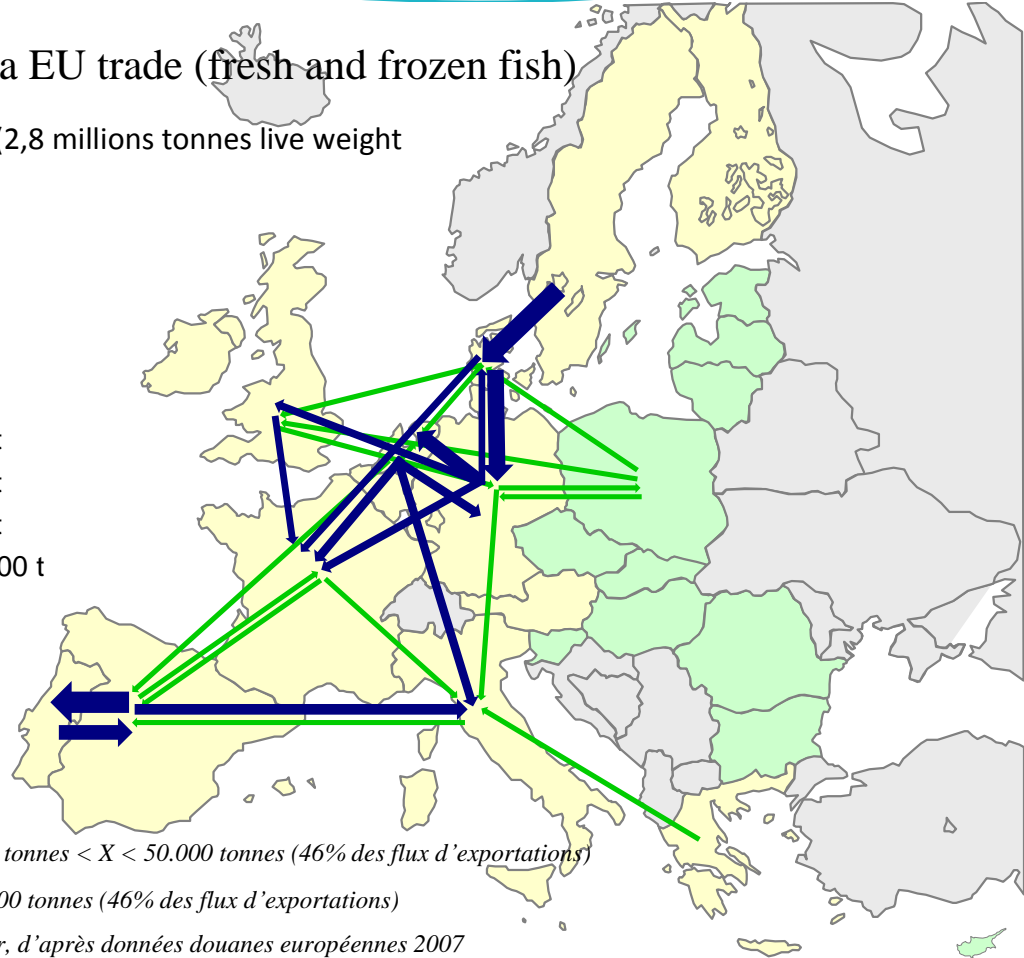


Intra EU trade (fresh and frozen fish)

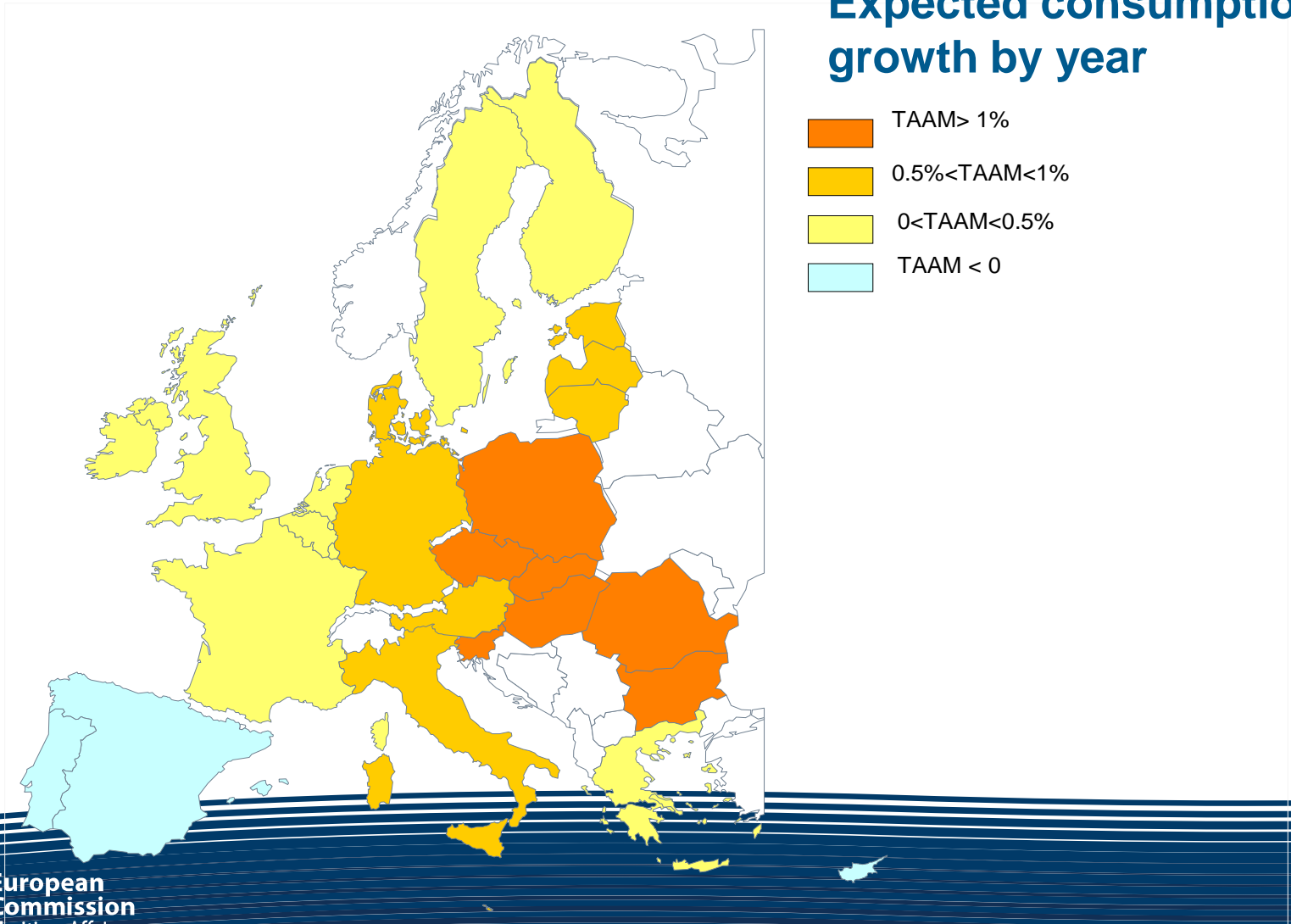
(2,8 millions tonnes live weight)



Source : FranceAgriMer, d'après données douanes européennes 2007



Consumption trends



Retails

- Increased share of large retail companies
- Role in consumption growth and in development of 'new' products
- Development of labelling
- Catering, restaurants and takeaways

Impact of the trade policy

- Trend towards decrease in customs duties
- Increasing importance of non tariff issues



Reform of the Market Policy



Four axes of the Market Policy

- **Organisation of the sector**
- **Price and intervention mechanisms**
- **Marketing standards and consumer information**
- **Management of external supply sourcing**

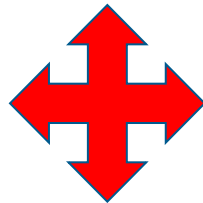


ORGANISATION OF THE SECTOR

Producer organisations

Responsible fisheries management

Concentration of supply, contractualisation



Production planning to fit the demand

Interbranch organisations

Communication, Promotion, Research, Standards

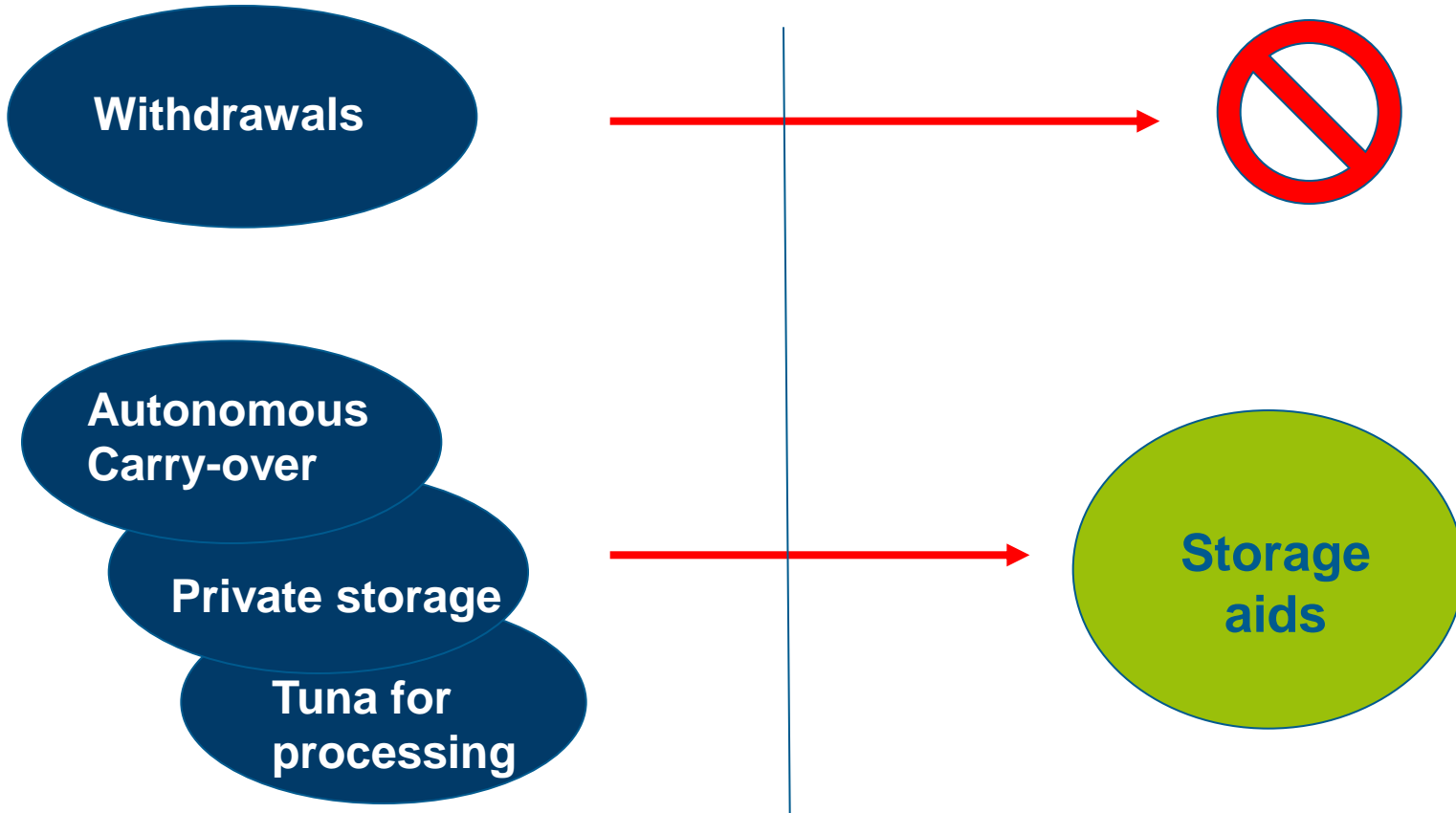
Better knowledge of markets and marketing

(EU Market Observatory)



PRICES AND INTERVENTION

Reg 104/2000



The information about market is scattered between regions and MS, and heterogeneous along the supply chain

The information is not shared between stakeholders and is much better on the processor/retailer side than on the producer/wholesaler side

From 1st sale...



....to retail price



All market actors

- Better view of market prices and opportunities
- Production planning
- Knowledge of consumer's demand (when, where, what...)

Policy makers

- Background for policy design
- Early warning of crises
- Survey of margins along the marketing chain



MARKETING STANDARDS AND INFORMATION TO CONSUMER

Reg 104/2000



Marketing standards

- Species
- Freshness
- Size
- Presentation



Information to consumer

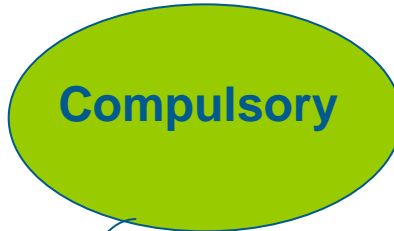
- Commercial designation
- Production method
- Catch area / country of production



Marketing standards

- Updating grading
- Minimum marketing sizes
- eBusiness
- Auto regulation

Information to consumer



Compulsory

+

- Nutritional (SANCO)
- Scientific name
- More detailed catch area
- Fresh / defrozen



Voluntary

- Environmentally friendly
- Fishing method
- Fair trade and social aspects
- ...



Traceability

- **Not a new development**
 - General Food Law
 - *R(EC) 2065/2001: information to consumers about fishery and aquaculture products: Provision should be made for the Member States to establish arrangements for checking the traceability of products covered this regulation*
- **A tool increasingly requested**
 - B2B
 - *Technological developments: bar code, chips, electronic sales note ...*
- **Control regulation:** *all lots of fisheries and aquaculture products shall be traceable at all stages of production, processing and distribution, from catching or harvesting to retail stage (Art 58)*



Next steps...

Options and impacts assessment

**Reform proposals adopted by the
Commission by mid 2011**

