



The European Union

Markets, Trade and Sustainability

TUNA 2012, Bangkok, 23-23 May 2012

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1. EU market and trade: development and trends



EU market: main trends

- EU market: dynamic consumption growth and increasing deficit
 - Increased consumption (20 kg per capita)
 - EU supply down by 30% in 10 years
 - Large increase of imports
 - Self sufficiency rate down
- EU: a very attractive market
 - Largest, most profitable, involving large global companies
 - Fish market - globalised market
 - Dynamic development of new products sold in the EU
- Active and integrated internal market
 - Main MS producers export essentially within the EU
 - Interdependence of EU markets



Supply of the EU market

Volume: 13 million tonnes live weight equivalent (human consumption)

EU Production = 6 million tonnes

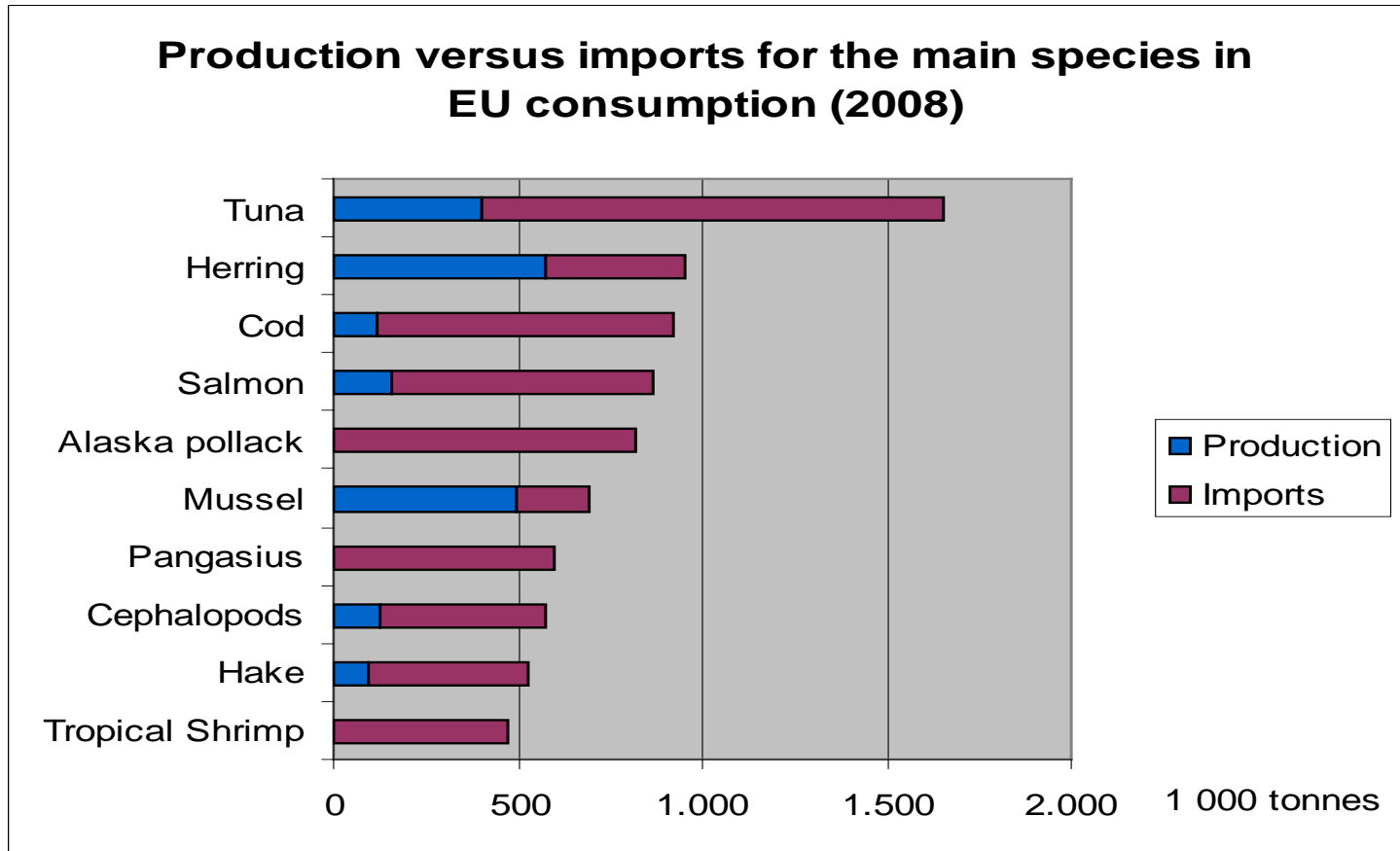
Imports = 9 million tonnes

Exports = 2 million tonnes

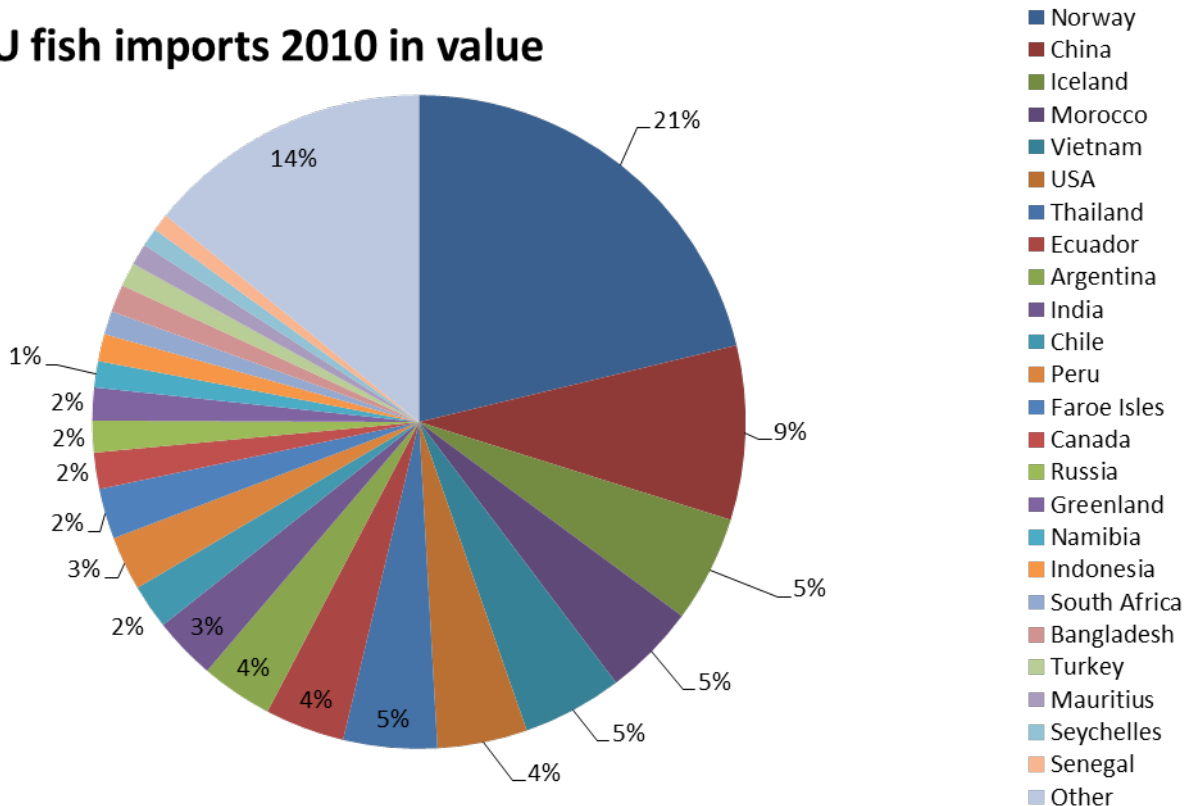
Value: €55 billion

First market in the world ahead of the USA, Japan or China (first in volume)

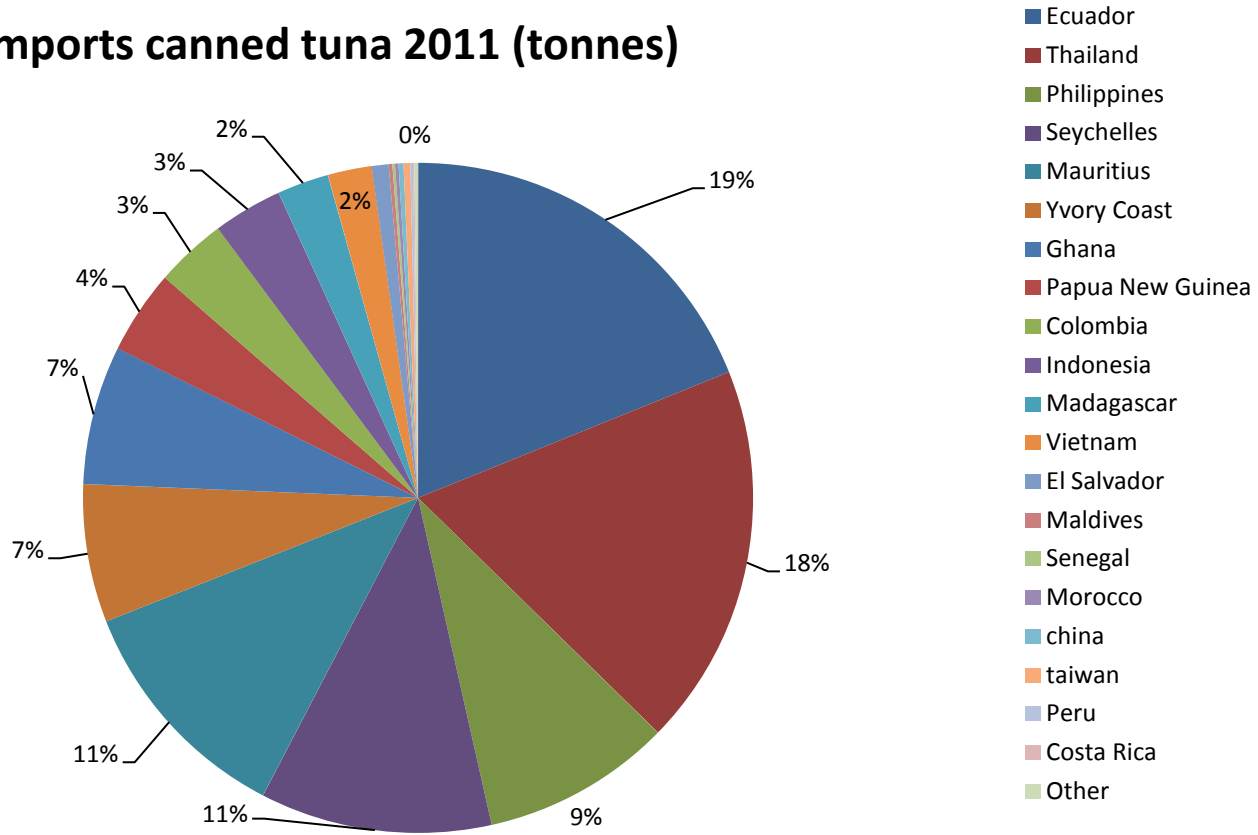
Strong dependency on imports



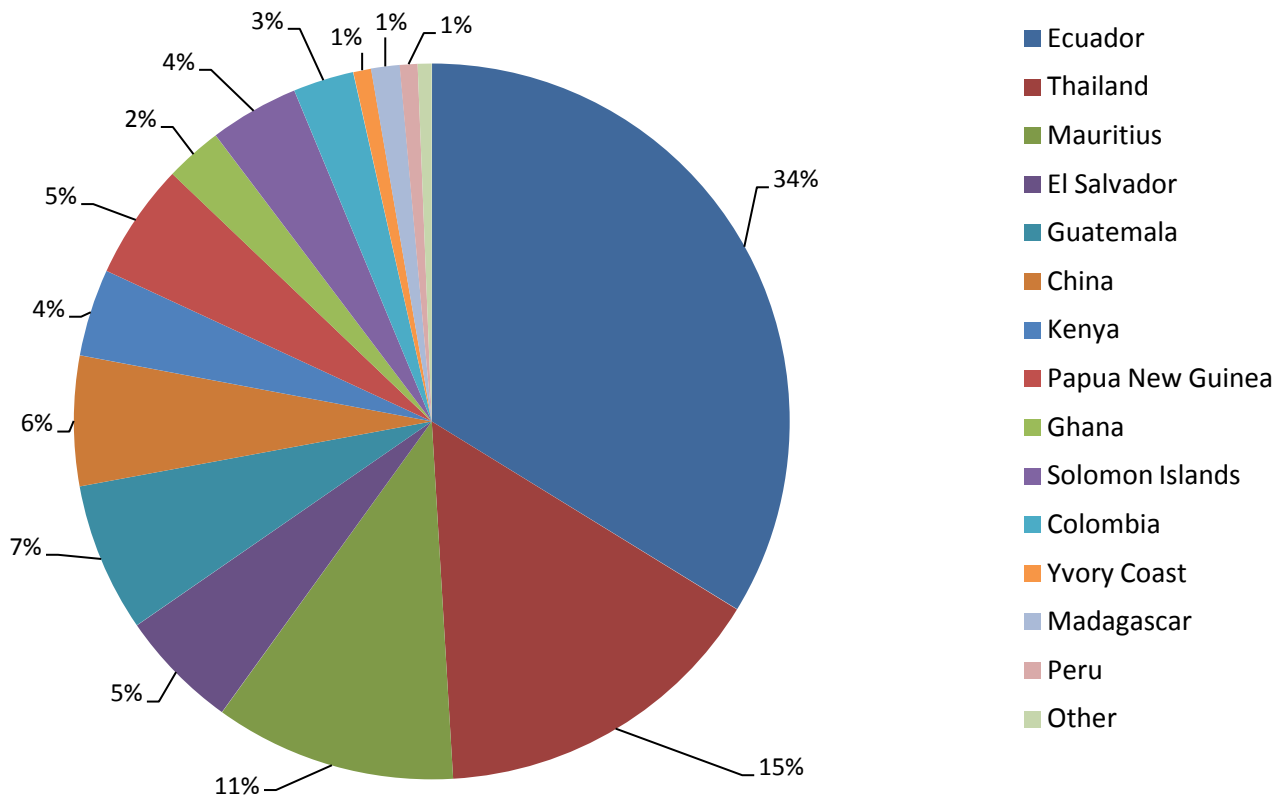
EU fish imports 2010 in value

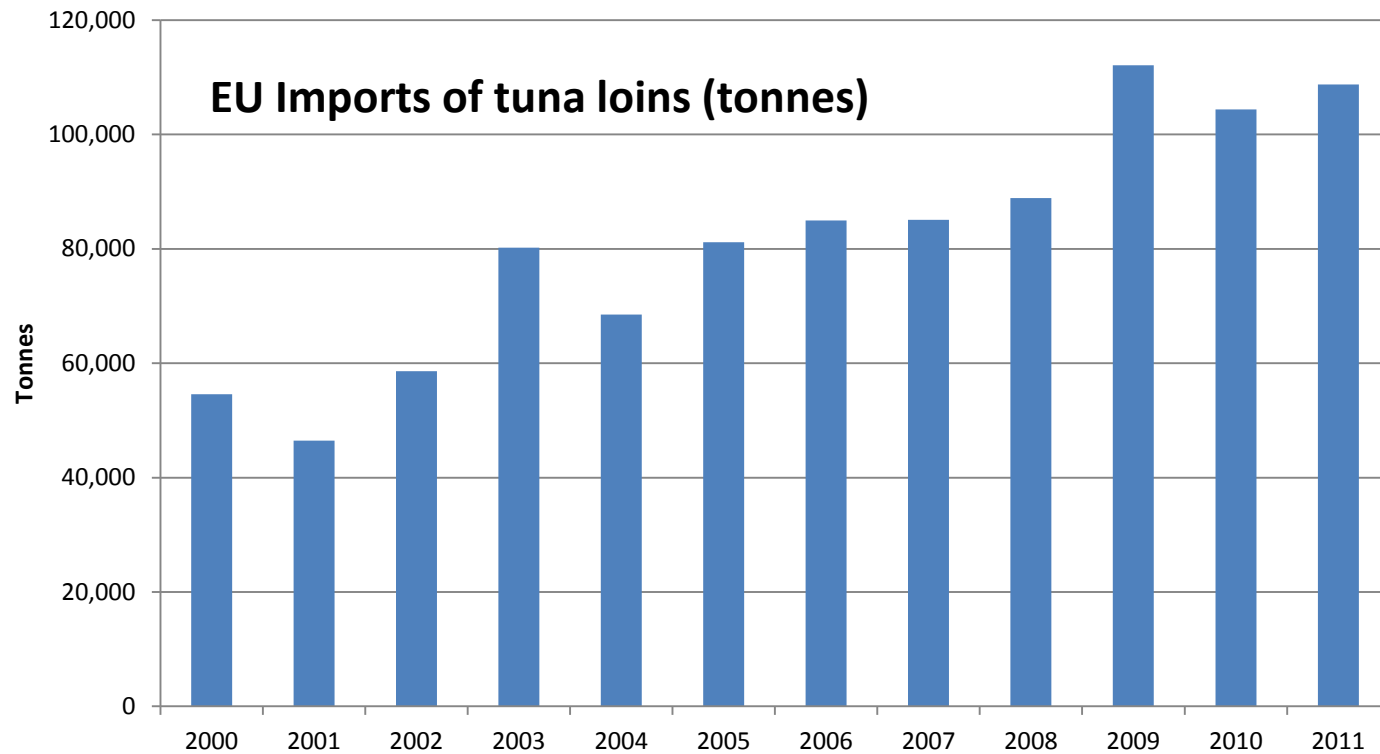


EU imports canned tuna 2011 (tonnes)

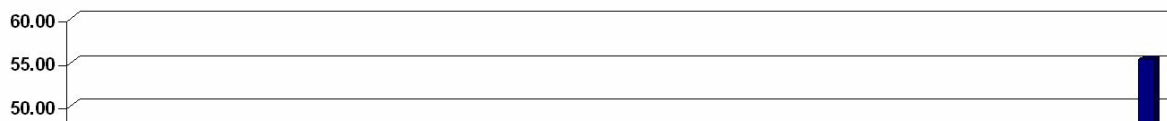
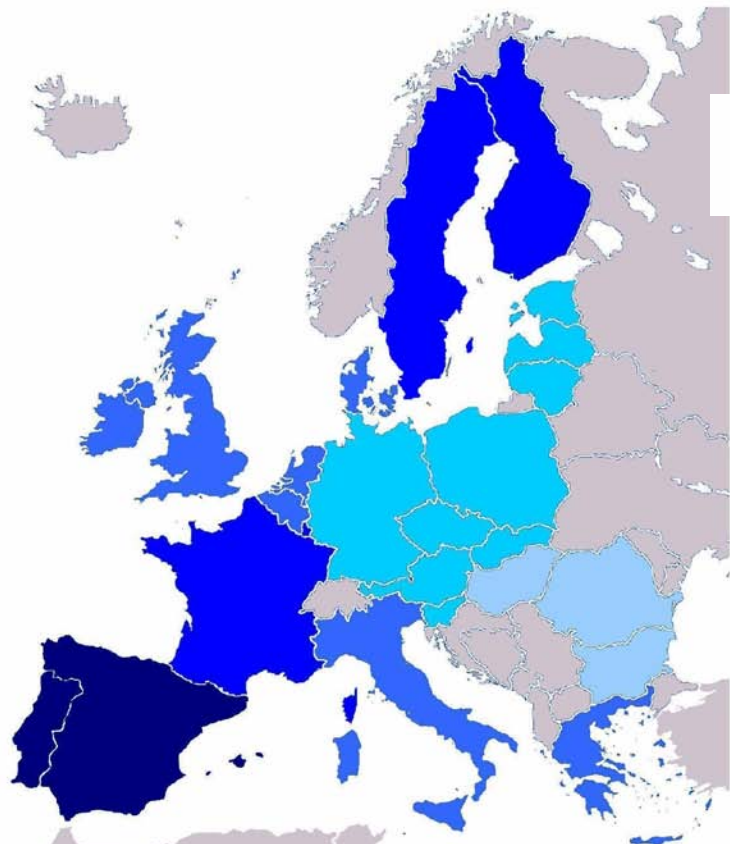


EU imports tuna loins 2011 (tonnes)

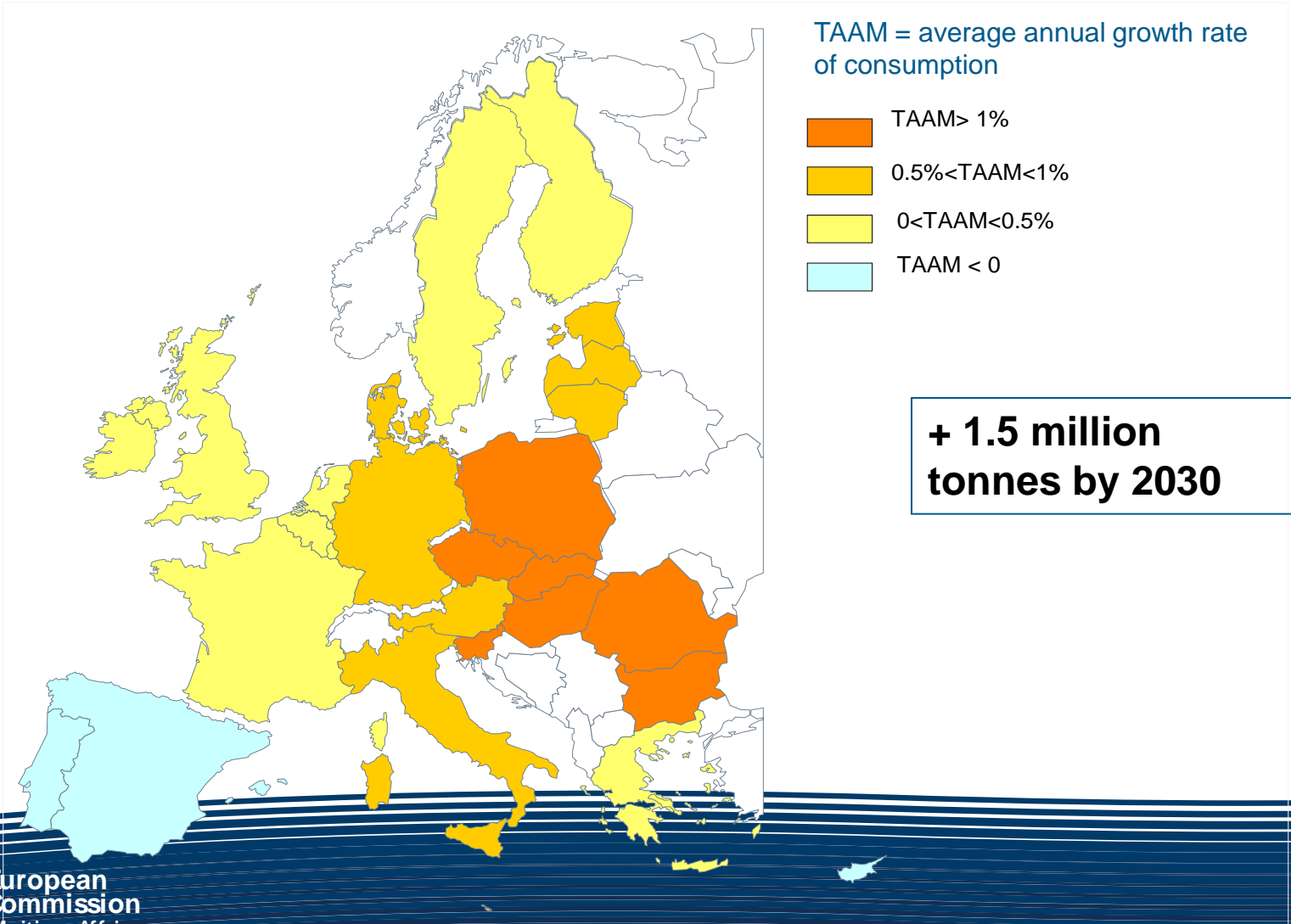




Heterogeneous consumption habits



Expected consumption growth



2. The CFP reform and its impact on sustainability



1. Main principles of the EU CFP Reform

- No discards
- MSY
- Science basis
- Precautionary approach
- Ecosystem approach
- Legality and compliance
- Performance (fishery management)



2. Why an external dimension of the CFP?

- 85% of world fish stocks are fully or over-exploited
- Fishing presence: EU vessels fish in all oceans
- Market power: EU consumes some 25% of the world fisheries resources in terms of value
- International agenda: EU participates in all relevant bodies (UN, FAO, OECD, 13 RFMOs...)
- Key partner: Bilateral and multilateral fisheries dialogues and agreements around the globe



3. External dimension of the CFP Reform

- Transforming dialogues into working partnerships
- Upholding and strengthening the global architecture for fisheries governance
- Contributing towards more effective functioning of RFMOs



4. Labelling for responsible consumption

Better choice for consumers and product differentiation

- **Setting mandatory information NEW**
 - More precise and clear product provenance – (Articles 42 to 45 of the new CMO)
 - Date of catch/harvest for fresh/chilled products
 - Information on commercial designation + provenance + catch/harvest for canned products
- **Framework for voluntary information NEW**
 - Without prejudice to legal framework for the labelling of all food products
 - Possibility to set minimum criteria if necessary



4. EU IUU Regulation (EC) 1005/2008)

- **Main components of the EU IUU Regulation:**
 - The catch certification scheme
 - Provisions on the inspection of third country fishing vessels in ports of a EU Member State (Port State Measures)
 - The EU IUU vessel list
 - List of non-cooperating third countries
 - Provisions concerning EU nationals
 - Assistance to third countries
 - System for mutual assistance and administrative cooperation



4. EU IUU Regulation (EC) 1005/2008

Catch Certificate

- All marine fishery products traded with the EU, including processed products, must be accompanied by validated catch certificates
- Appropriate flag State authority of the fishing vessel(s) that made the catches will validate the catch certificate
- The validation must certify that the catch was made in accordance with applicable laws, regulations and international conservation and management measures
- Validation can only be done by flag States
- Also EU catches must be validated upon exports if:
 - The receiving third country requires so (list on EU IUU website)
 - Catches are to be re-exported to the EU



4. EU IUU Regulation (EC) 1005/2008

Expected benefits

- All More sustainable management of fisheries
- Improved control over fishing activities:
 - carried out by a flag State's vessels
 - occurring in a coastal State's waters
- Increased revenues for fishing activities which are normally exploited by IUU operators
- Improved welfare and the livelihood of fishing communities and local fishermen
- Establishment of fair trade of fishery products
- Improved cooperation in the fight against IUU fishing



Thank you for your attention!

