EUROPEAN
COMMISSION

Brussels, 7.6.2024
COM(2024) 235 final

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL

Sustainable fishing in the EU: state of play and orientations for 2025

{SWD(2024) 139 final}

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1. INTRODUCTION

This Communication provides information on the status of European fisheries monitored in 2023. It also provides orientations for the Commission's proposals and consultations with third countries on fishing opportunities for 2025. The aim is to improve the resilience of fishers, boost the recovery of fish stocks towards the maximum sustainable yield (MSY) levels, and maintain healthy stocks at MSY level.

Far fewer fish stocks are now overfished compared to 2003. Fishers are seeing socio-economic gains from the stocks that have been managed at healthier levels for some time. Energy remains one of the major costs in the EU fishing fleet during 2023-2024 despite the reduction in fuel prices continuing to undermine the gains made. The ongoing actions[1] proposed by the Commission to support the energy transition of the fisheries and aquaculture sector are thus essential to strengthen its socio-economic resilience by supporting the sector in reducing its dependency on fossil fuel use.

The key challenges in EU fisheries and aquaculture, the actions proposed to tackle them, and the needs to improve the resilience of EU fisheries were outlined in the **Fisheries and Oceans package**[2]**,** followed by an intensive dialogue with and input from stakeholders**.** It is now time to look beyond these immediate challenges and needs and to take a wider perspective, to assess the situation within EU fisheries and aquaculture on the basis of the available evidence, and Member States and stakeholders' views. Based on the feedback received on the package and the obstacles identified by various stakeholders for the smooth transition to the energy efficiency in the sector and for the successful implementation of all CFP elements, the Commission is launching a full evaluation of the Common Fisheries Policy Regulation ('CFP Regulation')[3].

This evaluation will look back at 10 years of (2014-2024) of implementing the CFP Regulation. It will look at developments in fisheries, aquaculture, environment, trade, enlargement, health, animal welfare and research policies, the recent political developments, the changing geopolitical context and the impacts on the EU's fisheries policy. It will also cover the reshaped dynamic of fishing relations in the external dimension of the common fisheries policy (CFP), including the UK's withdrawal from the EU and relations with and

[1] COM(2023) 100 final

[2] COM(2023) 100 final; COM(2023) 101 final; COM(2023) 102 final; COM(2023) 103 final.

[3] Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy, amending Council Regulations (EC) No 1954/2003 and (EC) No 1224/2009 and repealing Council Regulations (EC) No 2371/2002 and (EC) No 639/2004 and Council Decision 2004/585/EC.

between coastal states in the North-East Atlantic. This is essential to provide a comprehensive view of how the Regulation and instruments are performing and to prepare the ground for the years ahead.

2. PROGRESS IN ACHIEVING SUSTAINABLE FISHING IN THE EU

A stock is fished sustainably at its MSY when the ratio between actual fishing mortality (F) and fishing mortality at MSY (F_{MSY}) is below or equal to one[4]. Thanks to the action taken by fishers and national administrations and the commitment from the European Parliament, Council and Commission to manage fisheries responsibly, fishing has become more sustainable and far fewer stocks are overfished in the EU.

The EU mission Restore our Ocean and Waters[5] by 2030 contributes to a wide range of solutions to protect and restore marine and freshwater ecosystems and their biodiversity, to tackle pollution and to support sustainable fishing. It therefore also contributes to implementation of the EU's marine action plan[6].

Each year, the Scientific, Technical and Economic Committee for Fisheries (STECF) updates the information available on the levels of fish stocks against the objectives of the common fisheries policy. In 2003, average fishing mortality in the North-East Atlantic[7] was 53% **above** the F_{MSY} target. The latest assessment shows that the mortality rate has progressively fallen to reach 42% **below** the F_{MSY} in 2022. Within this average figure there are wide variations. 25 stocks are still fished above the F_{MSY} while 58 are fished within that value. Fishing mortality rates have fallen steeply in all areas, reaching to the lowest levels in the **Bay of Biscay** and **Iberian coastal areas** and for **widely distributed stocks** (e.g. mackerel, blue whiting, horse mackerel and herring). In the North Sea, the average mortality rate is still higher than in other areas.

In the **Mediterranean and Black Seas,** the median F/F_{MSY} peaked at 1.90 in 2007, it levelled at 1.87 between 2008-2011 and has decreased since then. Over the last three years, the F/F_{MSY} fell from 1.59 to 1.20 in 2022 reaching the lowest level since 2003. This trend is consistent in all sub-regions. However, fishing pressure in the Mediterranean and Black Seas is still 20% above the median level considered sustainable.

On average, stocks in the North East Atlantic are now within the range consistent with the policy objectives on fishing mortality rate. Though good progress on reaching sustainability has been made in 2023, more progress is needed, especially in the Mediterranean and Black Seas.

The scientific community is actively studying extent to which factors other than fisheries such as ocean warming, acidification, pollution and deoxygenation of the seas may have lowered fisheries productivity, although knowledge gaps remain. What is known with some certainty,

[4] For a detailed analysis of F_{MSY} and the biomass state of fish stocks in all sea basins, see Section 1 of the accompanying staff working document.

[5] https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe/restore-our-ocean-and-waters_en

[6] COM(2023) 102 final

[7] In this section, 'North-East Atlantic' refers to stocks in area 27 of the Food and Agriculture Organisation (FAO).

in addition to climate-induced species distribution shifts[8], is that planktonic species and the timing and the extent of plankton blooms have altered[9]. There have also been large reductions in plankton abundance[10] in the period 2015-2019 and in nutrient inputs from land[11]. These changes may have negatively affected fish stock productivity.

In the Mediterranean, the central and eastern areas are considered more vulnerable to climate change due to increased pressure from invasive species of tropical origin (such as Lessepsian species and other species), higher water temperatures and less ocean circulation, which leads to lower levels of dissolved oxygen.

2.1. Fishing opportunities in 2024

Fishing opportunities are an important instrument in sustainable fisheries management. In the Atlantic, Baltic Sea and the Skagerrak/Kattegat, fishing opportunities are mainly set as catch limits also known as total allowable catches (TACs).

The **environmental situation** in the **Baltic Sea and its rivers is dramatically different** from the situation is other sea basins, and it continues to affect fish stocks and their development. The Baltic Sea today faces **multiple pressures**, which have led to a decline in biodiversity[12]. These pressures include eutrophication from nutrient inputs and persistently high levels of contaminants. This, in part, stems from failure to implement EU legislation[13]. One possible nature-based solution currently explored is the use of mussels, which can rapidly reverse eutrophication, restore deoxygenated 'dead zones' and sequester carbon as effectively as forests would on land. In addition to these external pressures, shortcomings in implementing EU rules on weighing and catch registration may also play a significant role in the decline of Baltic Sea fish stocks.

Four out of ten fisheries (western herring, both cod stocks and salmon in the main basin) in the Baltic Sea are no longer targeted and may only be landed as by-catch. The remaining target fisheries are the other pelagic stock (sprat and herring in the central Baltic Sea, the Gulf of Bothnia and the Gulf of Riga) and plaice, with catch limits set in line with the MSY, and salmon in the Gulf of Bothnia and in the Gulf of Finland, with catch limits set in line with the precautionary approach.

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[8] Climate change and the common fisheries policy - European Commission (europa.eu)

[9] Drifting microscopic algae and animals form the base of the pelagic food web and are a direct or indirect food source for fish, shellfish and seabirds. https://oap.ospar.org/en/ospar-assessments/quality-status-reports/qsr-2023/indicator-assessments/changes-plankton-biomass-abundance/

[10] https://oap.ospar.org/en/ospar-assessments/quality-status-reports/qsr-2023/indicator-assessments/changes-plankton-biomass-abundance/

[11] https://oap.ospar.org/en/ospar-assessments/quality-status-reports/qsr-2023/indicator-assessments/changes-plankton-biomass-abundance/

[12] HELCOM Quality status report 2023 (HOLAS 3): https://helcom.fi/wp-content/uploads/2023/10/State-of-the-Baltic-Sea-2023.pdf

[13] In particular the Nitrates Directive, the Urban Waste Water Treatment Directive, the Marine Strategy Framework Directive, the Water Framework Directive, the Habitats and Birds Directives, the Waste Framework Directive, the Maritime Spatial Planning Directive, the Single Use Plastic Directive, the Common Fisheries Policy Regulation, the integrated maritime policy and the common agricultural policy.

The Baltic Sea multiannual plan[14] provides many tools to help ailing fish stocks recover, including suspending target fisheries, setting TACs below the maximum advised levels, closing during spawning periods and limiting recreational fishing. But unless the Member States apply and implement EU legislation in full, fish stocks will not recover. A commitment was made in the *Our Baltic 2020* Ministerial Declaration to implement EU law in full; it is vital now to do so[15]. The 2nd edition of *Our Baltic* was held on 29 September 2023, including a progress report on the commitments made in 2020[16].

To overcome the effects of pollution, eutrophication and climate change on the marine ecosystems, fisheries and aquaculture, it is essential to start with input from the scientific community. Science enables policymakers to take informed decisions and to fully implement the **ecosystem-based approach to fisheries and aquaculture** management, one of the key principles of the CFP and the best way to meet its objectives.

The EU waters in the **Atlantic and Skagerrak/Kattegat** have lower pressures on fish stocks and different environmental conditions. In these sea basins, the EU has managed the 29 fish stocks in a sustainable manner, delivering multiple positive results with higher TACs for 5 in 2024. Fishers in the Bay of Biscay have made significant efforts to manage fish stocks well, leading to fisheries managed in line with the MSY for a number of years as shown by the 2022 STECF report. However, despite their efforts, this area saw a major drop in fishing opportunities for 2024 due to the legal obligation to remain at MSY levels.

Most EU stocks are now shared with **coastal States in the North-East Atlantic**. For more than 85 TACs **shared with the UK**, the EU and the UK agreed TACs for 2024 based on best scientific advice, within the deadline set by the Trade and Cooperation Agreement[17]. Most TACs were set in line with the MSY where advice was available. There were ten stocks that received a zero-catch advice for 2024 from the International Council for the Exploration of the Seas (ICES). For nine of these stocks, the EU and the UK agreed to set low bycatch TACs for 2024 to prevent choking situations in mixed fisheries, in line with the EU legal framework. For one stock, the EU and the UK agreed to set a scientific monitoring TAC for 2024, following advice from ICES on the TAC[18].

Improving management of shared stocks agreed by the EU and UK under the framework of the Specialised Committee for Fisheries, in particular aligning the management areas to the

[14] Regulation (EU) 2016/1139 of the European Parliament and of the Council of 6 July 2016 establishing a multiannual plan for the stocks of cod, herring and sprat in the Baltic Sea and the fisheries exploiting those stocks, amending Council Regulation (EC) No 2187/2005 and repealing Council Regulation (EC) No 1098/2007 (OJ L 191, 15.7.2016, p. 1).

[15] https://commission.europa.eu/system/files/2020-09/ministerial_declaration_our_baltic_conference.pdf

[16] https://op.europa.eu/en/publication-detail/-/publication/2e76afa1-5695-11ee-9220-01aa75ed71a1

[17] Trade and Cooperation Agreement between the European Union and the European Atomic Energy Community, of the one part, and the United Kingdom of Great Britain and Northern Ireland, of the other part (OJ L 149, 30.4.2021, p. 10).

[18] Written Record of fisheries consultations between the United Kingdom and the European Union for 2024: https://oceans-and-fisheries.ec.europa.eu/system/files/2023-12/2024-eu-uk-fisheries-consultations_en.pdf.

assessment units used by ICES, were instrumental to improve the sustainable management of shared stocks and to reaching a prompt and satisfactory agreement[19].

Most stocks shared between the **EU, Norway and the UK** in the North Sea indicate a positive trend. For 2024, the EU, Norway and the UK agreed to set TACs for these stocks in line with MSY advice. The agreement on TACs includes an increase for cod, which has been set below the MSY advice for precautionary reasons. TACs for two other stocks were set below the MSY point value to cater for their interaction with cod in mixed fisheries. The North Sea herring TACs were set in line with the scientific advice, and parties agreed to continue limiting catches in the Skagerrak-Kattegat to mitigate the impact on the depleted Western Baltic herring stock. TACs for the two assessed **stocks managed bilaterally with Norway** in the Skagerrak-Kattegat were set in line with the MSY or precautionary advice[20].

For mackerel, blue whiting and Atlanto-Scandian herring, stocks that are **widely distributed** across the North-East Atlantic[21], coastal States[22] agreed to set overall TACs for 2024 at MSY level. However, in the absence of sharing arrangements and due to unilateral actions by some parties including excessive interannual transfers, the sum of quotas from coastal States and fishing parties still exceeds the overall TACs agreed. This further undermines the sustainability of these stocks, hinders progress made in reaching coastal States agreements, and more generally has strained in the cooperation in these fora. The EU remains committed to reaching a sustainable outcome of the herring discussions. It continues to actively engage in discussions with other coastal States and fishing parties with the aim of concluding new comprehensive sharing arrangements for the sustainable management of these stocks.

The **Mediterranean and Black Seas** are home to multispecies fisheries where many stocks are shared with third countries. The fishing mortality rate has approached a sustainable level for some stocks. In 2021, 26 stocks reached F_{MSY} or lower levels, but 38stocks are still fished above sustainable levels. Action must continue to reduce fishing and reach the MSY. To do so, states must apply the Western Mediterranean multiannual plan ('West Med MAP')[23] and the 2030 Strategy of the General Fisheries Commission for the Mediterranean (GFCM)[24]. For

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19 For minutes of SCF meetings, see: https://commission.europa.eu/strategy-and-policy/relations-non-eu-countries/relations-united-kingdom/eu-uk-trade-and-cooperation-agreement/meetings-eu-uk-partnership-council-and-specialised-committees-under-trade-and-cooperation-agreement/specialised-committee-fisheries_en.

20 Record of conclusion of fisheries consultation between Norway and the European Union on the regulation of fisheries in Skagerrak and Kattegat for 2024: https://oceans-and-fisheries.ec.europa.eu/document/download/675ccb20-4b1c-456e-b13c-8e7b853002e3_en?filename=2023-12-08-EU-NO-Skagerrak-Agreed-Record-2024.pdf.

21 https://www.ices.dk/community/groups/pages/wgwide.aspx, the Working Group on Widely Distributed Stocks (WGWIDE) compiles and analyses data on large stocks of pelagic species, as well as other widely distributed and highly migratory species.

22 Coastal states in the North-East Atlantic managing these stocks are the Member States of the European Union, United Kingdom, Norway, Iceland, Faroe Islands, Greenland, and the Russian Federation.

23 Regulation (EU) 2019/1022 of the European Parliament and of the Council of 20 June 2019 establishing a multiannual plan for the fisheries exploiting demersal stocks in the western Mediterranean Sea and amending Regulation (EU) No 508/2014 (OJ L 172, 26.6.2019, p. 1).

24 GFCM 2030 Strategy for sustainable fisheries and aquaculture in the Mediterranean and the Black Sea. https://www.fao.org/documents/card/en/c/cb7562en.

2024, the fishing opportunities are in line with a substantial set of measures adopted in the 2023 fishing opportunities regulation for the implementation of the West Med MAP.

In the transitional phase of the **West Med** MAP, and to achieve the MSY by 2025, the fishing opportunities for 2024[25] take an **integrated approach**. This approach builds on management tools and develops the compensation mechanism that encourages states to use more selective gear and to close areas to fishing. Member States are encouraged to continue using this mechanism. The Council has also set maximum catch limits for 2024 for the most overfished deep-water shrimps and maintained the caps on fishing with long liners.

Intensive work under the **GFCM**, supported by the EU's consistent position in regional fishery management organisations (RFMOs), has led to the adoption of significant decisions. Above all, it has led to two multiannual management plans and the adoption of maximum catch limits for common dolphinfish in the Mediterranean Sea, a consolidation of management measures for European eel in the Mediterranean Sea in all habitats including freshwaters and further measures to reduce fishing mortality for the glass eel.

The GFCM also continued implementing the two Adriatic long-term management plans to provide high long-term yields consistent with the MSY. For the continued implementation of the small pelagic species multiannual plan, the GFCM set lower catch limits for 2024 for anchovies and sardines, and a freeze of capacity for pelagic trawlers and purse seiners. For the demersal stocks multiannual plan in the Adriatic, the GFCM set a maximum fishing effort limit for both bottom and beam trawlers, to achieve the MSY in 2026 for all 5 key stocks (European hake, Norway lobster, common sole, deep-water rose shrimp and red mullet). Lower catch limits were adopted under the four multiannual plans managing deep-water shrimp in the Ionian Sea, Levant Sea and the Strait of Sicily (including effort management for hake). The GFCM adopted harvest limits for red coral. For the Black Sea, a TAC was set for turbot under the GFCM plan, and an EU autonomous quota was set for sprat.

The EU agreed on measures for **European eel[26] in marine and adjacent brackish waters in the North-East Atlantic (including the Baltic Sea)**, continuing the six-month closure period. It also agreed on a closure period to coincide with the juvenile eel migration and to protect mature eels swimming between the sea and rivers. These measures will be subject to increased monitoring in 2024. The Commission continue to monitor progress in implementing the measures in the joint declaration[27] on strengthening the recovery of European eel, signed by the Commission and some Member States[28].

[25] Council Regulation (EU) 2024/259 of 10 January 2024 fixing for 2024 the fishing opportunities for certain stocks and groups of fish stocks applicable in the Mediterranean and Black Seas (OJ L, 2024/259, 11.1.2024).

[26] Article 13 of Regulation (EU) 2024/257.

[27] https://data.consilium.europa.eu/doc/document/ST-5374-2023-ADD-1-REV-1/en/pdf

[28] Austria, Croatia, Cyprus, Czech Republic, Estonia, Finland, Germany, Greece, Hungary, Ireland, Lithuania, Luxemburg, Malta, Portugal, Romania, Slovakia.

3. STATE OF THE EU FLEET

Member States must keep fleets under the national ceilings set for vessel capacity (in terms of gross tonnage (GT) and engine power (kW)). Member States that have fleet segments with a demonstrated imbalance must present action plans that set adjustment targets and tools to achieve balance with a clear timeframe for implementation. Any capacity withdrawn with public aid may not be replaced[29].

Since 2022, the number of vessels, GT and engine power has fallen by 0.44%, 0.52% and 0.10% respectively. As a result, by 31 December 2023, the EU fishing fleet[30] comprised 71 608 vessels of 1 305 115 GT and 5 226 554 kW.

Member States indicated in their 2023 reports that their fleets are below the ceilings and meet the requirements under Article 22 of the CFP Regulation. However, concerns remain on the accuracy and reliability of the data underpinning the national reports and the accuracy of Member State action plans. A number of Member States find no need to submit action plans despite having fleet segments with 'red' indicators[31] showing that these segments are not in balance.

Different parameters are used to assess whether a fleet is in balance. For instance, unprofitable or underused fleet segments may indicate that the fleet segments are recurrently or permanently tied up and inactive Similarly, if many vessels spend less time fishing than they could, then the fleet segment may be too large for the available resources on which the vessels rely.

Several segments still lack data to assess their balance in full. Member States are invited to increase their data collection efforts, especially in areas where the information is limited, such as outermost regions. To this end, the Commission is working on the adoption of special guidelines for the assessment of the balance of certain fleet segments in the outermost regions introducing alternative methods to be applied for the preparation of certain indicators used to assess balance. In the 2023 Communication on the CFP[32], the Commission called on Member States to increase the transparency and flexibility of their fishing capacity management and to consider reallocating unused capacity for structural investment on board. For those fleet segments which are not in balance, the Member States shall prepare new or updated action plans as part of their national fleet reports.

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[29] Article 22 of the CFP Regulation - Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy, amending Council Regulations (EC) No 1954/2003 and (EC) No 1224/2009 and repealing Council Regulations (EC) No 2371/2002 and (EC) No 639/2004 and Council Decision 2004/585/EC

[30] Including the fleet fishing in outermost regions.

[31] 'Red' indicators show fleet segments that are out of balance with the fishing opportunities. A 'green' indicator shows a fleet segment in balance with the fishing opportunities.

[32] Communication from the Commission to the European Parliament and the Council, The common fisheries policy today and tomorrow: a Fisheries and Oceans Pact towards sustainable, science-based, innovative and inclusive fisheries management, COM/2023/103 final.

4. SOCIO-ECONOMIC PERFORMANCE

After fuel prices peaked at EUR 1.2 per litre in 2022, prices have gradually fallen to EUR 0.8-0.9 per litre in the first quarter of 2024. At current prices, the EU fishing fleet can expect to produce a gross value added of around EUR 2.5 billion, cover their operational costs and maintain jobs and salaries for around 122 000 fishers. This is a significant improvement on 2022, when most EU fishing fleets were unable to cover their operational costs.

Although overall, most national fleets are expected to be profitable in 2024, a socio-economic analysis indicates that a number of fleet segments will face challenging conditions, particularly those that depend on overfished stocks and use energy-intensive fishing gear. By contrast, fleet segments that depend on stocks exploited sustainably and that have increased their energy efficiency tend to perform better and generate higher salaries for their crews. This illustrates the important socio-economic gains in stock conservation and energy efficiency by EU fishing fleets.

Though fuel prices have fallen, energy remains one of the major costs for the EU fishing fleet in 2024. This vulnerability is a result of many fleets having a high level of energy intensity and a high level of dependence on fossil fuels. On this front, the Commission proposed several actions in the Communication on the Energy Transition of EU fisheries and aquaculture[33] to help the EU fishing fleets accelerate its energy transition and reach the objective of climate neutrality by 2050. The actions included setting up the Energy Transition Partnership in EU fisheries and aquaculture[34], and issuing a guide to stakeholders and Member States on how to best use the European Maritime Fisheries and Aquaculture Fund (EMFAF) and other existing EU funds to support the energy transition.

5. LANDING OBLIGATION

The landing obligation is one of the core elements of the CFP. Its purpose is to ensure the marine biological resources are exploited in a sustainable way, aiming to increase selective fishing, so that unwanted catches are not caught in the first place and to eliminate discarding.

However, Member States mostly use traditional monitoring techniques, such as inspections at sea, inspections at landing and aerial surveillance. These tools alone are not sufficient to tackle the issue of illegal discards of catches during fishing at sea[35] and there are indeed indications of illegal and undocumented discarding.

On 22 November 2023, the European Parliament and the Council adopted new EU control rules, and these will contribute to the effective monitoring of compliance with the landing obligation[36]. These include an obligation for larger vessels, which pose a high risk of non-

[33] COM(2023) 100 final (eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52023DC0100)

[34] Energy Transition Partnership - European Commission (europa.eu)

[35] Several Member States have agreed to participate in an EFCA-coordinated REM pilot project to learn best practice on REM controls (one or two vessels per Member State). Denmark uses REM in the nephrops fleet operating in the Kattegat and the Netherlands is conducting a fully documented fisheries scheme on a few vessels in the North Sea. Neither project is being used for control and enforcement purposes.

[36] Regulation (EU) 2023/2842 of the European Parliament and of the Council of 22 November 2023 amending Council Regulation (EC) No 1224/2009, and amending Council Regulations (EC) No 1967/2006 and (EC)

compliance with the landing obligation, to install remote electronic monitoring systems on board, including closed-circuit television cameras, by 10 January 2028 at the latest. However, the new rules do not make the use of cameras on board vessels of less than 18 metres in overall length compulsory. It is therefore necessary to explore how these vessels will be controlled and how compliance with the landing obligation will be ensured for the many vessels in the EU fleet under 18 metres and those perceived as being below 'high risk'.

Accurate recording of catches is essential for stock assessments, as the scientists use the data reported in logbooks and collected under the Data Collection Framework[37] to underpin scientific advice. As highlighted in the 2023 Communication on the CFP[38], data accuracy is also essential to the evaluations that help the Commission decide whether EU action should continue or be adjusted.

The landing obligation also requires the *'detailed and accurate documentation of all trips'*[39] and that catches be '*counted against the quotas where applicable'*[40]. The weighing and registration of landed catches is essential in monitoring quota uptake and is fundamental to the successful fisheries management. Verifications conducted by the Commission over several years have shown that Member States do not always ensure that catches are weighed in accordance with EU rules and that there is often significant misreporting of the actual quantities landed.

Stakeholders are making efforts to tackle these issues. Research projects and cooperation between scientists and fishers have generated valuable lessons on more selective fishing methods and gear, and on managing discards under the landing obligation rules. The European Maritime and Fisheries Fund (**EMFF**) and the **EMFAF**, provide financial support to implement the landing obligation, with a high rate of public aid. At the end of 2023[41], Member States had selected 302 operations with a total EMFAF funding of €58.2 million for the landing obligation. Most operations aimed to increase the added value or quality of unwanted catches[42], reduce the impact of fishing on the marine environment and eliminate discards[43].

Despite the efforts made, much more is needed to implement the landing obligation, five years after it entered into force in full. In January 2024, the Commission launched a study

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No 1005/2008 and Regulations (EU) 2016/1139, (EU) 2017/2403 and (EU) 2019/473 of the European Parliament and of the Council as regards fisheries control (OJ L, 2023/2842, 20.12.2023).

37 Regulation (EU) 2017/1004 of the European Parliament and of the Council of 17 May 2017 on the establishment of a Union framework for the collection, management and use of data in the fisheries sector and support for scientific advice regarding the common fisheries policy and repealing Council Regulation (EC) No 199/2008 (OJ L 157, 20.6.2017, p. 1).

38 Communication from the Commission to the European Parliament and the Council, The common fisheries policy today and tomorrow: a Fisheries and Oceans Pact towards sustainable, science-based, innovative and inclusive fisheries management, COM/2023/103 final.

39 Article 15(13) of Regulation (EU) No 1380/2013 of the European Parliament and of the Council.

40 Article 15(1) of Regulation (EU) No 1380/2013 of the European Parliament and of the Council.

41 EMFAF implementation report 2023, Directorate-General for Maritime Affairs and Fisheries publication will follow.

42 Article 42 of the EMFF Regulation.

43 Article 38 and 39 of the EMFF Regulation.

underpinning the evaluation of the landing obligation. The study will collect evidence for an assessment on how the landing obligation has performed, and why it performs as it does.

6. MAIN MESSAGES AND ORIENTATIONS FOR 2024 FISHING OPPORTUNITIES PROPOSALS

6.1. Key stages to setting the next fishing opportunities

In preparing its proposals for the 2025 fishing opportunities, the Commission will take into account the findings of the judgment issued by the Court of Justice on 11 January 2024 in Case C-330/22[44]. It will also draw its proposals on the scientific advice issued by the ICES and the STECF, including ecosystem considerations where these are provided in scientific advice, the decisions taken during international negotiations with third countries, decisions taken by RFMOs and on a socio-economic analysis, as well as the entry into force of the permanent phase of the West Med MAP from January 2025.

The Commission will cover as many stocks as possible in its proposals, subject to the availability and timing of the scientific advice.

The Commission invites Member States and stakeholders to assess the scientific advice as soon as it is publicly available. Stakeholders can provide feedback or recommendations through Advisory Councils, national authorities and individually to the Commission.

The Commission will conduct various consultations with the UK, Norway and other coastal states starting in October. The aim is to conclude the negotiations in time to integrate the outcome of the consultations into the deliberations of the Agriculture and Fisheries Council in December 2024.

As well as setting fishing opportunities, the Commission will work throughout the year to achieve progress on sharing arrangements for widely distributed stocks with third countries that lack such arrangements, to ensure shared stocks are fished in a sustainable manner.

6.2. Setting fishing opportunities for different sea basins

For stocks managed only by the EU in **the Baltic Sea, Skagerrak/Kattegat and the Atlantic**, the Commission will propose TACs and quotas in line with the MSY when this advice is available. Where management plans provide flexibility to set catch limits, the Commission may propose using the upper range of MSY for healthy stocks, provided that the scientific advice considers it necessary to achieve the objectives under the multiannual plans, especially for mixed fisheries. Where the biomass has decreased so much that it is below safe biological limits, the Commission propose to rebuild the stocks and include remedial measures, in line with each multiannual plan. It will focus action on getting a full MSY advice for other key stocks as soon as possible.

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[44] Judgment of 11 January 2024, *Friends of the Irish Environment (Possibilités de pêche supérieures à zéro)*, C-330/22, EU:C:2024:19. The judgment rules on the validity of Council Regulation (EU) 2020/123 fixing for 2020 the fishing opportunities for certain fish stocks and groups of fish stocks, read in combination with Articles 9, 10, 15 and 16 of Regulation 1380/2013 and Articles 1 to 5, 8 and 10 of Regulation (EU) 2019/472.

The Commission will also deduct the *de minimis* or high survivability exemptions from ICES advice where appropriate. The Commission will also evaluate Member States' progress in implementing the current by-catch reduction measures adopted alongside unavoidable by-catch-only TACs to alleviate potential choke situations.

Where possible, the Commission will continue moving to a system of multiannual TACs for EU-only stocks. For two EU-only stocks, multiannual TACs have been set for 2024 and 2025. This will increase efficiency and predictability for the EU fishing industry for stocks selected in close consultation with Member States, stakeholders and the ICES. Member States are asked to list priority stocks for which they recommend 2-year TACs. Following an assessment, the Commission will ask the ICES to assess the stocks identified:

i. against the ICES multiannual advice criteria;
ii. in terms of multiannual advice feasibility; and
iii. in terms of the possible implications of such multiannual advice.

For shared stocks managed with the **UK, Norway and other coastal States**, the EU will follow the same approach as for EU-only stocks. It will base its position on the best available scientific advice, with the objective of setting fishing opportunities in line with MSY levels and negotiating with the UK, Norway and other coastal States, where relevant, conservation measures. The CEU will continue to cooperate with the UK on the joint EU-UK commitments made in the Specialised Committee on Fisheries and with the UK and Norway to follow through on the trilateral commitments made to achieve sustainable fishing and management of shared stocks. The EU remains committed to finding sustainable, balanced and comprehensive sharing arrangements for widely distributed stocks that are jointly managed with other coastal States.

For the **Mediterranean and Black Seas**, it is essential that Member States pursue the objectives set in the EU West Med multiannual plan and in the GFCM plans in line with the 2030 strategy. The Commission encourages Member States to implement accompanying measures under the EMFAF programmes. On 1 January 2025, the transitional phase of the West Med EU MAP will end, and the plan will enter into the full implementation phase. This means that the F_{MSY} ranges in the multiannual plancould be used, if the stocks are above the precautionary reference points, to possibly apply flexible measures to mixed fisheries. The proposal for fishing opportunities should include the available management tools, F_{MSY} ranges, and the compensation mechanism to improve gear selectivity and area closures. The STECF evaluates progress in the implementation of the multiannual plan annually. The Commission has also launched work on each aspect of sustainability with a view to reporting in July 2024 on the impact of the West Med MAP on the stocks and the fisheries concerned.

Shared stock management is also necessary to ensure sustainable fishing in international waters and to level the playing field in the Mediterranean and Black Seas. To this end, the proposal for fishing opportunities in 2025 will cover current GFCM measures and additional measures to be adopted at the annual GFCM session in November, including important measures to implement the Adriatic small pelagic species and demersal species multiannual plans, long-term measures for European eel and for red coral. For Black Sea species, the

Commission will propose TACs and quotas for turbot and sprat, in line with the measures to be adopted at the annual GFCM session, based on the results of the GFCM pilot studies and research programmes.

The progress made in the Mediterranean and Black Seas must continue and accelerate, building on the results of the GFCM high-level conference of October 2023 and the 2024 Fish Forum. Greater focus is needed in the GFCM/FAO SSF Summit (July 2024) and the Regional Aquaculture Conference (December 2024). These will be important milestones in the process to prepare the next MedFish4Ever Ministerial declaration for the next Ministerial Conference in 2026. All Member States must continue action to achieve sustainable fish as this is the basis for a resilient fishing sector, and for protecting ecosystems in these sea basins.

There is an urgent need to improve the protection of **European eel**. In addition to closely monitoring implementation of the 2024 fishing opportunities and assessing the measures for 2025 for marine waters, the Commission again calls on Member States under the EU marine action plan to update their eel management plans under the Eel Regulation[45], in line with their legal obligations under EU environmental law. It is important to step up measures in inland waters to create a level playing field as the eel mortality rate in inland waters is significant and needs urgent remedial action. To facilitate this dialogue and process, the Commission organised a technical workshop on eel management on 24 April 2024 within the context of the marine action plan. The GFCM is currently working on future long-term measures for European eel that cover all habitats, including inland waters.

7. CONCLUSION

The overall sustainability of EU fisheries improved further in 2023, thanks to continued action. This is particularly the case in the EU waters in the Atlantic. The situation in the Baltic Sea, however, remains extremely worrying as populations of previously important commercial stocks continue to decline due to multiple sources of pressure. For the Mediterranean and Black Sea, despite recent improvements in the state of some stocks, more action and greater commitment is required to tackle the situation.

Climate change affects human activities and the intensity of pressures as well as the links between these. To tackle the pressure on fish stocks, it is crucial that the Member States implement EU legislation in full and that all stakeholders take concerted action to reduce pressure on fish stocks. The EU is tackling marine pollution through a number of legislative and policy initiatives under the broad framework of the zero pollution action plan[46].

The Commission's proposals for fishing opportunities in 2025 will seek to enable stocks to recover, consolidate the fish stocks that have reached sustainable levels and to boost the resilience of fishers.

[45] Council Regulation (EC) No 1100/2007 of 18 September 2007 establishing measures for the recovery of the stock of European eel.

[46] These include setting limits to marine litter, underwater noise, nutrients and contaminants under the MSFD and implementing measures to achieve them. See COM/2021/400 final.

A thriving fisheries sector is key to preserving European coastal communities and to managing the transition to more sustainable food systems. As stated in the Fisheries and Oceans package, it is paramount to make a shared commitment to make our marine areas and European fisheries fit for the future.

The Commission invites Member States, Advisory Councils, stakeholders and the public to provide feedback on this Communication by 31 August 2024.

PLANNED WORK SCHEDULE[47]

When	What
May - November 2024	ICES scientific advice
June - end August 2024	Public consultation on the Communication
End August 2024	Commission adopts the proposal for fishing opportunities in the Baltic Sea
Mid-September 2024	Commission adopts the proposal for fishing opportunities in the Mediterranean and Black Seas
October - December 2024	Annual consultations on fishing opportunities with parties in the North-East Atlantic
October 2024	Council meeting on fishing opportunities for the Baltic Sea Coastal states consultations on widely distributed stocks in the north-east Atlantic
End October 2024	Commission adopts the proposal for fishing opportunities in the Atlantic/North Sea
4-8 November 2024	GFCM annual session
12-15 November 2024	NEAFC annual meeting
1 December 2024	STECF stock assessment and management advice
December 2024	Council meeting on FOs in the Atlantic/North Sea Council meeting on FOs in for the Mediterranean and Black Seas

[47] For RFMO-managed stocks in EU waters and certain non-EU waters, fishing opportunities are adopted after the annual meeting of the RFMOs by revising the Council regulation setting the fishing opportunities.