



State of Play CFP and consultation for fishing opportunities for 2018

COM(2017) ~~XXX~~ final

Introduction

Purpose:

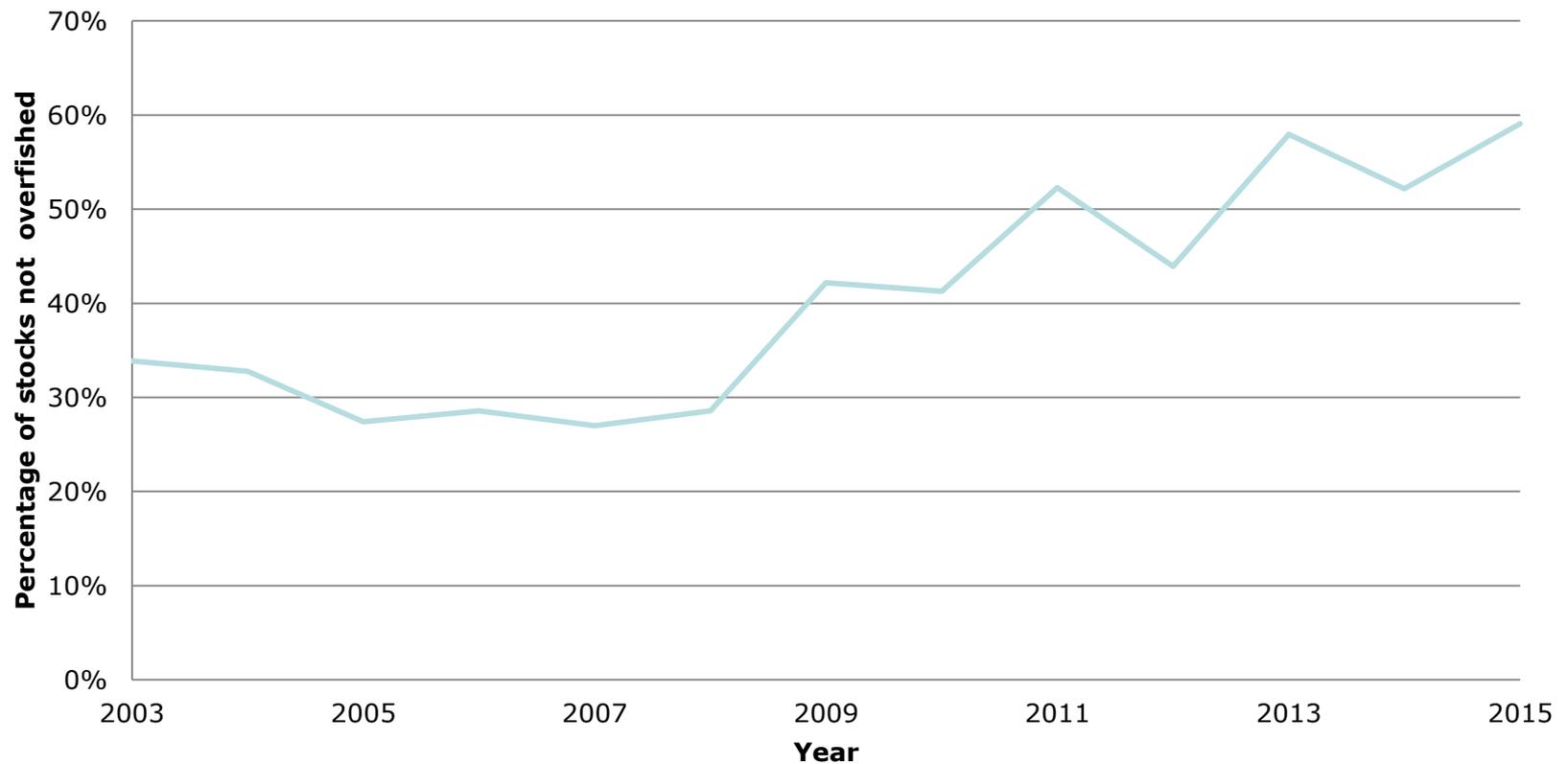
- **Give a state of play and the progress that has been made on reformed CFP and its core elements;**
- **Track the state of stocks;**
- **Set out the Commission's intentions for next year;**
- **Provide a basis for consultation**

Reaching MSY

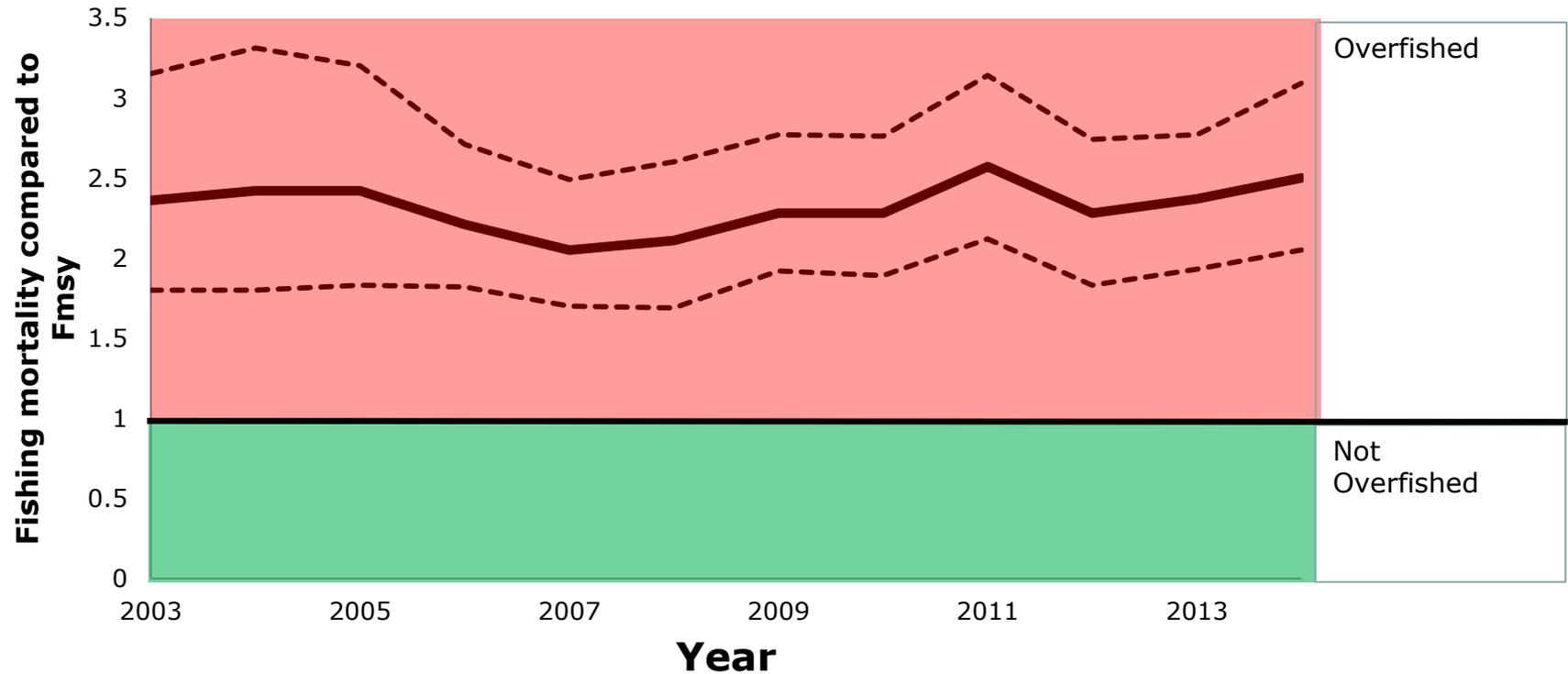
- 39 out of 66 stocks assessed in the North-East Atlantic were exploited within Fmsy (59%).
- The TACs set in line with MSY advice increased to 44, representing 61 % of all catches in the North-East Atlantic.
- Achieving Fmsy for stocks in Mediterranean and Black sea require sustained efforts.

Stocks not overfished ($F \leq F_{msy}$)

North East Atlantic, North Sea and Baltic Sea



Stocks in Mediterranean and Black Sea



Rebuilding Stocks

- Average fish stock biomass in the North-East Atlantic increased by 35% between 2003-2015.
- Stocks in North-East Atlantic classified as safe within biological limits has doubled from 35% in 2003 to 68% in 2015.
- Mediterranean Sea average fish stock biomass declined by 20% from 2003-2014.

Economic performance of EU fleet

- *Net profit of EUR 777 million in 2014;*
 - **A 50% increase over 2013 with EUR 500 million.**
- Economic forecasts for 2016 & 2017 remain upbeat.
- Average salaries and labour productivity have also increased.
- This overall improvement coincides with an increase in the number of stocks fished at rates consistent with the objective of achieving MSY and an associated increase in the biomass of these stocks.



Increased number of sustainable fish stocks, leading to increased productivity

(Northeast Atlantic, North Sea & Baltic Sea)

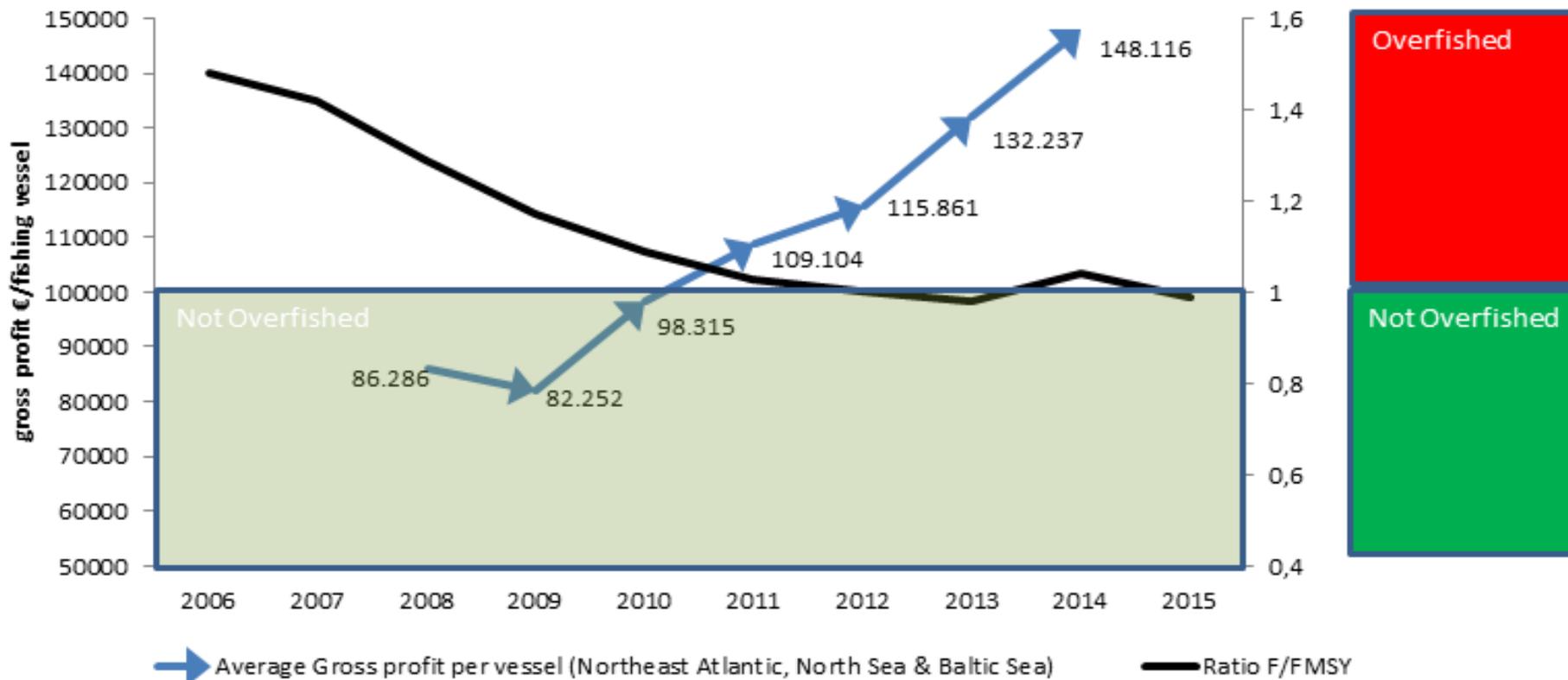
average gross profit per vessel (€)

number of fish stocks exploited sustainably

landings per seaday (kg/day)



Trends in economic performance and fishing mortality compared to the FMSY



Regionalisation I

CFP promotes decentralisation for fisheries management.

- MAP main instrument to achieve CFP objectives
 - **Adoption MAP Baltic Sea in 2016;**
 - **Proposal COM MAP North Sea august 2016;**
 - **Proposal COM MAP small pelagic Adriatic Sea.**

Regionalisation II

Delegated Acts: instrument to shape measures

- 15 Joint Recommendations from Member States for discard plans → phasing-in Landing Obligation
 - 7 Joint Recommendations received for art. 11 conservation measures for the North Sea and Baltic Sea.
- ❖ **33% increase of number of recommendations from Advisory Councils (AC) from 2013-2016.**
 - ❖ **Three AC of (1) Black Sea, (2) Markets, and for (3) Aquaculture are now fully operational.**

Landing obligation I

- All fisheries in Baltic Sea, Black Sea, as well as pelagic and industrial species in all EU waters.
- North Sea: 82% of all TAC
 - **28% demersal**
- North Western Waters: 86% of all TAC
 - **46% demersal**
- South Western Waters: 77% of all TAC
 - **27% demersal**

Landing obligation II

- Mediterranean Sea: 29% of species with minimum conservation size
 - **82% small pelagic and 17% demersal**
- Black Sea: all species subject to TAC, i.e. sprat and turbot

Annual reports of Member States highlight challenges of landing obligation

- ❖ **Choke species; marketing of undersized catches.**
- ❖ **Concerted effort industry, administration and Commission required.**

Fishing opportunities 2018

Will follow CFP objectives and based upon best available scientific advice.

❖ **Not available? → precautionary principle**

Incorporates adjustments resulting from further expansion of the landing obligation

Way forward

When	What
July – September	Public consultation on the Communication
May/June/October	Stock advice from ICES
26 September	Seminar on the state of the stocks with stakeholders Adoption of TAC proposals for the Baltic Sea
October	Council on TACs for the Baltic Sea
November	Adoption of TAC proposals for the Atlantic/North Sea/Black Sea
December	Council on TACs for the Atlantic/North Sea/Black Sea

Public and AC Consultations

by 15th September

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