

NAPA Blue Whiting Sub-group

Chair: Dave Robb, Cargill

Date: 5 February 2025



Meeting Agenda

- **Review of actions** – Fi Birch-Green
- **Blue whiting TAC update** – Fi Birch-Green
- **Update on recent advocacy and engagement** – Aoife Martin
- **North Atlantic Seafood Forum** – Aoife Martin
- **Communications Update** – MWC
- **Member survey of blue whiting use** – Dave Robb
- **Sourcing statements** – Aoife Martin
- **NGO engagement** – Aoife Martin
- **AOB**

Observance of Competition Law

You are reminded that you will at all times refrain from discussing any information which is confidential to your company and/or which is likely to affect the commercial strategy or activities of your company.

You are in the best position to judge what is, and what is not, commercially sensitive or confidential and so responsibility lies with you in the first place.



Review of Actions

Fi Birch-Green

Review of Actions

- **NAPA partners** to send any evidence of activities that may contribute towards FIP actions to Fi Birch-Green by midday on Friday 18th October, for inclusion in FIP progress report. – **Complete**
- **Aoife Martin** to contact North Atlantic Seafood Forum (NASF - Bergen, 4-6 March) organisers regarding an agenda slot for the NAPA blue whiting sub-group. – **Complete, further update today**
- **NAPA partners** to reach out to supply-chain contacts in Iceland, Norway and EU who may be able to further NAPA engagement with Fisheries Ministers, negotiators, catching sector, retailers and salmon producers. – **Ongoing**
- **NAPA team** to contact members in relation to sourcing statements and payment of membership fees for 2024-25. – **Complete**
- Next BW sub-group meeting to take place in Jan/Feb 2025. – **Complete**

Blue whiting TAC update

Fi Birch-Green

Blue whiting TAC update

- The majority of the blue whiting catch is taken by **Norway, Faroe Islands, EU** and **Iceland**.
- The ICES advice for 2025 is **1,447,054 tonnes**, decreasing **5.4%** compared to 2024's advice (this would result in a **23%** reduction in overall catches).

In October 2024, Coastal States agreed:

- In line with ICES advice, the total catch limit for BW in 2025 will be 1,447,054 tonnes.
- To reconvene to discuss quota sharing arrangements no later than early 2025.
- That parties may fish BW within their quotas in their respective zones and in international waters.
- That further arrangements for access, quota transfers, etc are to be regulated by bilateral agreements.

Average blue whiting catch 2019-2023:

State	Average (tonnes)	%
Norway	314,566	23%
Faroe Islands	289,919	22%
EU	256,174	19%
Iceland	237,397	18%
Russia	160,400	12%
UK	63,396	5%
Greenland	20,421	2%

Blue whiting TAC update

What we know now in February 2025:

- Coastal State declarations of 2025 quotas for BW have not been published.
- Details of most bilateral agreements for 2025 do not appear to be available.
- In December 2024, the EU confirmed transfer of 81,750 tonnes of BW to Norway (in exchange for Barents Sea cod).
- Next Coastal States discussions set for 5-6 February 2025 (if a Plenary is held on Thursday, NAPA will attend and report back).



Update on recent blue whiting advocacy and engagement

Aoife Martin

Recent advocacy and engagement

Meeting with EU negotiators (16 January):

- Purpose of meeting: Explore EU perspectives shared during NAPA workshop in December 2024.
- Small NAPA team attended (NAPA staff, sub-group chairs and EU businesses).
- Entrenched narrative from the EU was disappointing:
 - Strong frustrations with unilateral quota setting by Norway and the Faroes in 2021/22 (NAPA criticised these actions at the time).
 - Felt blindsided by the mackerel tri-lateral agreement.
 - Painted the EU as playing fair but blamed others of quota grabbing.
- NAPA stressed the importance of certification to the market, the FIP time limit, and concerns about declining fish stocks. We urged the EU to set aside their differences and take meaningful action in collaboration with other parties.

Recent advocacy and engagement

Upcoming meetings with Coastal States negotiators:

When? 13 February in London, to be held around the Coastal States negotiations at NEAFC HQ.

Confirmed meetings:

- Icelandic Lead negotiator – Gudmundur Thordarson ✓
- EU catching sector – Tim Heddema (Pelagic Freezer-trawler Association) and Dominic Rihan (Killybegs Fishermen's Organisation) ✓

Meetings pending confirmation:

- Faroese Lead negotiator and adviser – Herluf Sigvaldsson and Ingibjörg Petersen ?
- Faroese catching sector – Páll Holm Johannesen (Faroese Pelagic Organisation/Felagið Nótaskip) and Stefan í Skorini (Faroese Shipowners' Association/Føroya Reiðarafélag) ?

Recent advocacy and engagement

- Meeting with Kate Sanderson (Head of Representation, Faroe Islands).
- Meeting with Costco - pending membership.
- Confirmation that Salmar have agreed to join NAPA - kindly facilitated by Leif Kjetil Skjæveland. This now means we have membership backing of nearly 80% of all Norwegian salmon production!
- Bakkafrost: We have engaged proactively to see if they will join.

North Atlantic Seafood Forum

Aoife Martin

Blue whiting management failures and consequences for the Norwegian salmon industry

North Atlantic Seafood Forum, Bergen
Wednesday 5 March 2025, 16.15-17.15 (CET)

Agenda:

- **Introduction** – Tarjei Eide (Managing Director at Cargill)
- **Blue whiting profile** – Aoife Martin (NAPA Independent Chair)
- **Consequences for Norway's salmon sector** – Jørgen Skeide (Feed Manager at Lerøy Seafood) and Tor Eirik Homme (Feed and Nutrition Director at Grieg Seafood)
- **Consequences for the global processing and retail sector** – Scott Johnston (Group CSR Manager at Sofina Foods Europe)
- **Discussion** – moderated by Leif Kjetil Skjæveland (Sustainability and Public Affairs Manager at Skretting Norway)
- **Close** – Dave Robb (Aqua Nutrition Group Sustainability Lead at Cargill)

Communications Update

MWC

Member survey of blue whiting use

Dave Robb

Member survey of blue whiting use

Aims of survey?

- Estimate total NEA blue whiting production purchased by NAPA partners and collect information on end use of blue whiting products.
- Generate figures (and a possible infographic?) showing the scale and importance of blue whiting to NAPA partners and downstream businesses in Coastal States, and the potential consequence of failing to agree sharing arrangements. **Present survey results at North Atlantic Seafood Forum.**
- Demonstrate to regulators the importance of NAPA partners as **customers of the blue whiting catching fleet** and thus of paying attention to our needs.

Survey focus?

- **Fresh fish** (for direct human consumption or to produce fishmeal and oil).
- **Fishmeal and oil** (to make feed, or in feed for aquaculture or livestock).

Member survey of blue whiting use

Survey questions for fresh fish use:

NEA Blue Whiting	Country of Landing	2022	2023	2024
Quantity of whole, fresh BW purchased (tonnes)	Norway			
	Faroe Islands			
	Iceland			
	Denmark			
	Ireland			
	UK			
	Other			
Quantity of trimmings or other parts of fresh BW purchased (tonnes)	Norway			
	Faroe Islands			
	Iceland			
	Denmark			
	Ireland			
	UK			
	Other			
If trimmings or other parts purchased, what parts? Eg fillets, portions, etc				
If trimmings or parts purchased, can you provide a conversion factor back to whole fish?				
If parts purchased, what percentage was from another NAPA member?				
What percentage of your market for products that contain fresh BW is in the Coastal States (including all EU, not including Russian Fed.)?				
To which other countries do your products that contain fresh BW go?				

Confidentiality

- Data will be anonymised and aggregated to ensure strict confidentiality.
- Any additional requirements for companies to provide data (e.g. verbally rather than electronically, confidentiality agreement etc), then **please speak to the NAPA team rather than not engage with the survey.**

Member survey of blue whiting use

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Quantity of whole, fresh BW purchased (tonnes)	Norway			
	Faroe Islands			
	Iceland			
	Denmark			
	Ireland			
	UK			
	Other			
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	Faroe Islands			
	Iceland			
	Denmark			
	Ireland			
	UK			
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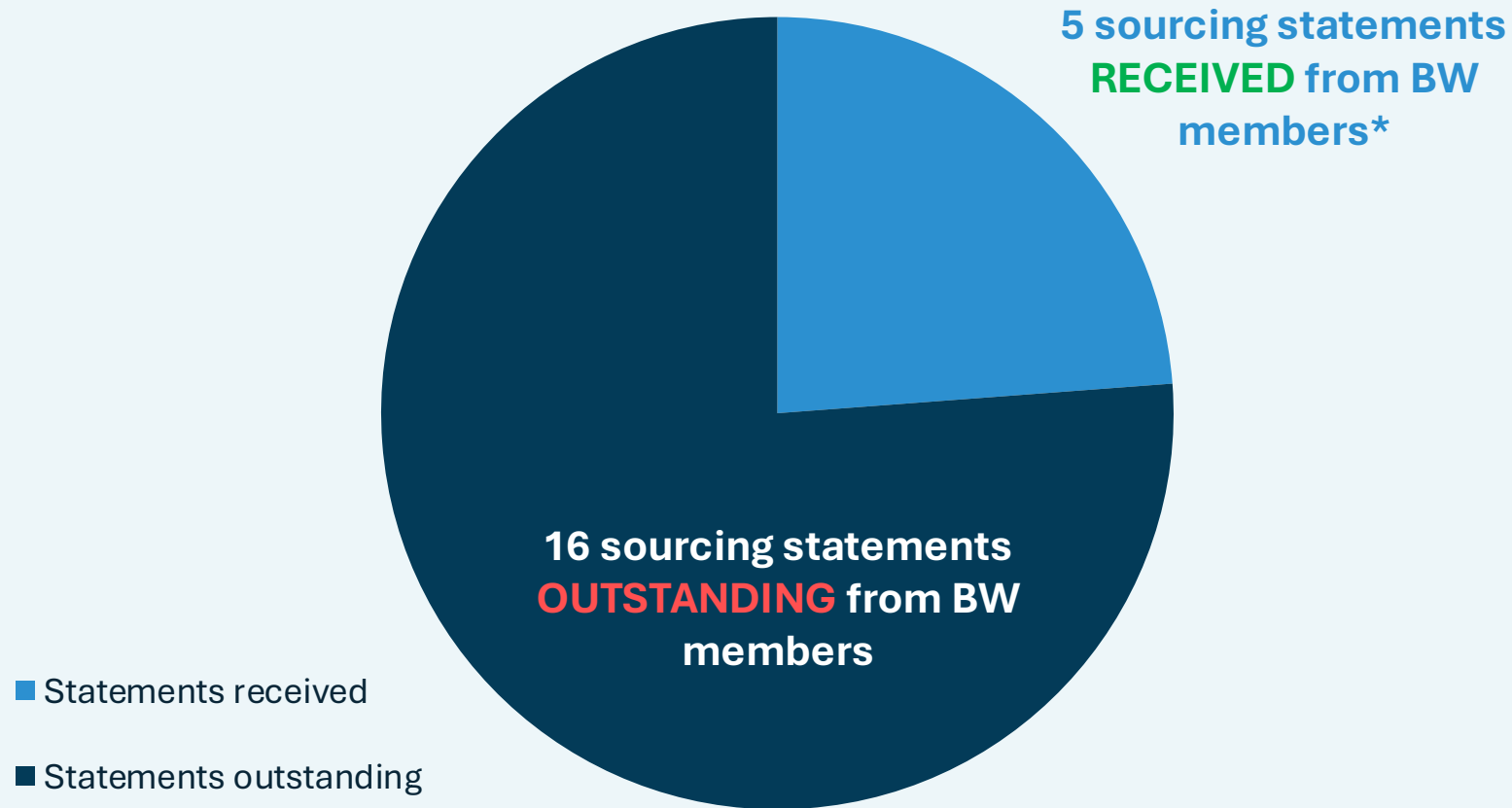
Next Steps
 Please complete survey circulated via email on 04/02/25 and return it to Rob Blyth-Skyrme by 21/02/25.



Sourcing statements

Aoife Martin

Blue whiting sub-group member sourcing statements



*Cermaq, EFFOP, Skretting, Salmon Group, Lunar Group

NGO Engagement

Aoife Martin

NGO Engagement

- NGOs offer an untapped opportunity to build a chorus of support around NAPA's asks and messaging.
- NAPA has built good relationships with several NGOs through attending NEAFC meetings (e.g. Pew, MSC, Accountability.Fish, Blue).

Proposal for NAPA partner consideration:

- Two NGO roundtable meetings to be held in the lead up to the 2025 Coastal States autumn negotiations (April and September?).
- Explore topics of commonality and ways we can work together to jointly leverage pressure on Coastal States.

Q: Which NGOs (from your country) would you recommend NAPA engage with?

AOB

Aoife Martin


AOB

- Dates of next blue whiting sub-group meetings (May and September)



Thank you

Contact

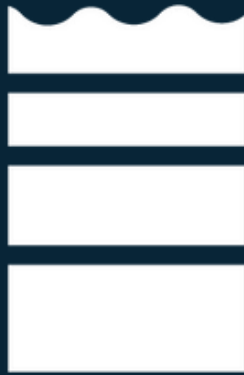
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