NAPA Blue Whiting Sub-group

Date: 2 October 2025

Chair: Dave Robb, Cargill

Welcome and Introductions

Dave Robb

Observance of Competition Law

NORTH ATLANTIC PELAGIC ADVOCACY GROUP

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.

Meeting Agenda

- **Welcome and Introductions**
- Update on **latest ICES advice**
- Discussion on the **Coastal States meetings**
- Update on the **NAPA proposal**
- Update on the **NAPA Blue Whiting project**
- NAPA **Comms update**
- **All NAPA meeting** in December
- **NAPA Admin**: Resources/Subscriptions

Latest ICES Advice

Rob Blyth-Skyrme

Latest ICES Advice

Blue Whiting, ASH and Mackerel advice released 30 September 2025.

ASH:

- 2025 catch ≈ 435,010 t, only 8% above advice of ≤401,794 t (lowest since 2012)
  (Remembering, ASH in peril in 2024, with ICES advice dependent on recruitment)
- ICES Benchmark in 2025 – minor revisions
- SSB now midway between MSYBtrigger and Blim – fallen from 2024
- But, recruitment is considered good – 2026 advice is an increase to 533,914 t

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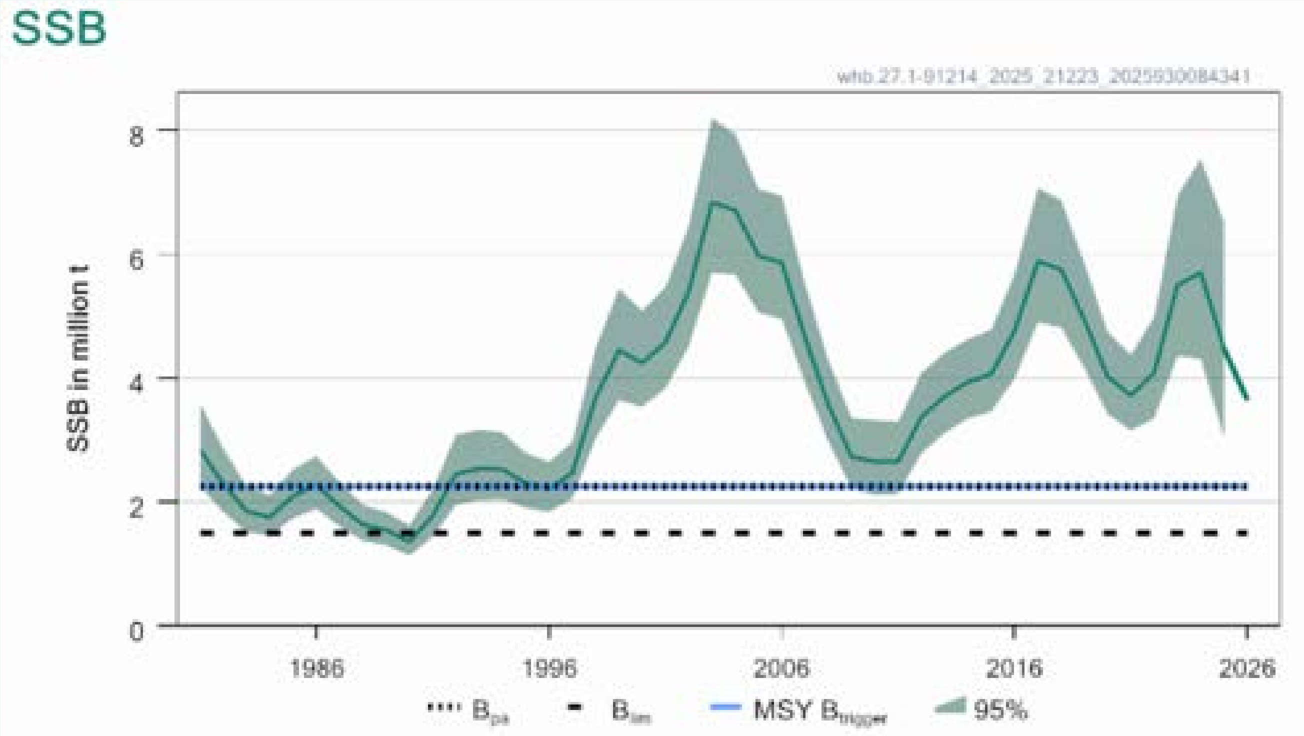
Mackerel:

- 2025 catch ≈ 755,143 t, 31% above advice of ≤576,958 t (about average excess)
  (Remembering, MAC was just above MSYBtrigger in 2024, downward trajectory)
- ICES Benchmark in 2025 – changed the assessment substantially
- SSB now below Blim – fallen from 2024
- Recruitment is poor – 2026 advice aims to achieve Blim: Catch = 174,357 t

Latest ICES Advice

BLUE WHITING - Key points:

- Stock is **well above Btrigger** but declining.
- **SSB estimates** have **declined** between the 2024 and 2025 advice by 34%.
- Perception of the recent peak in biomass has changed and been revised downwards, so estimate of fishing mortality has been revised upwards.



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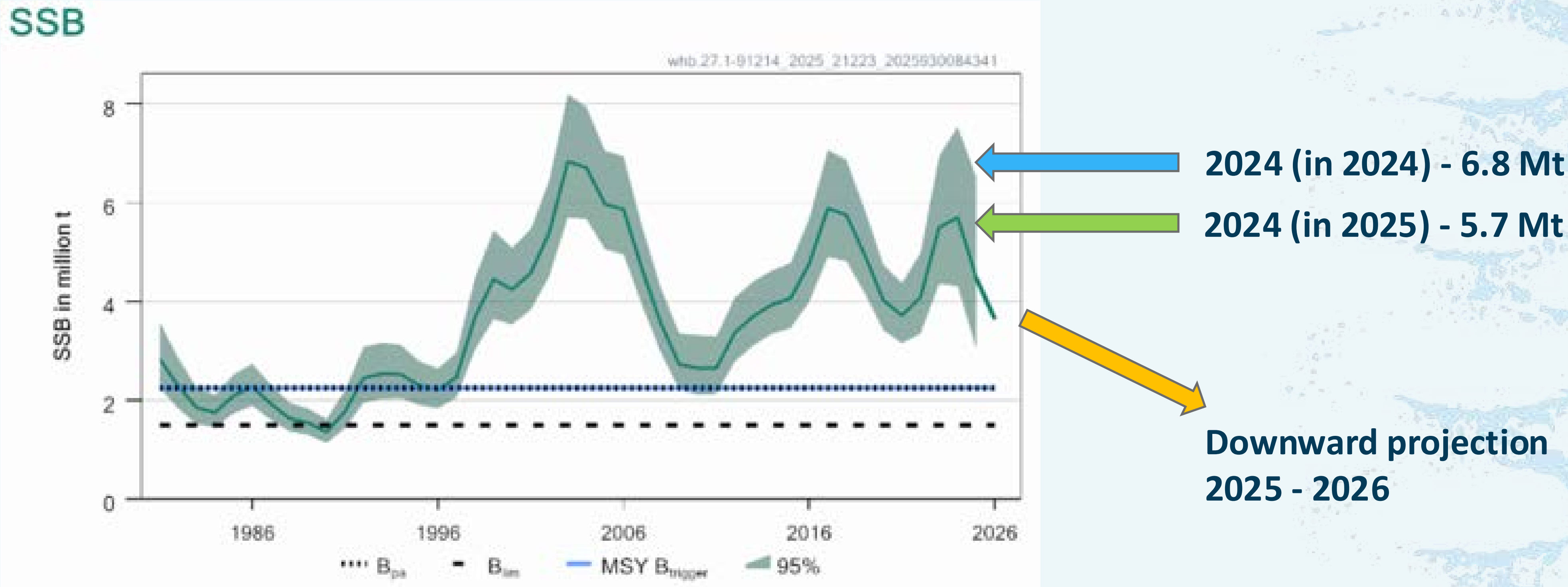

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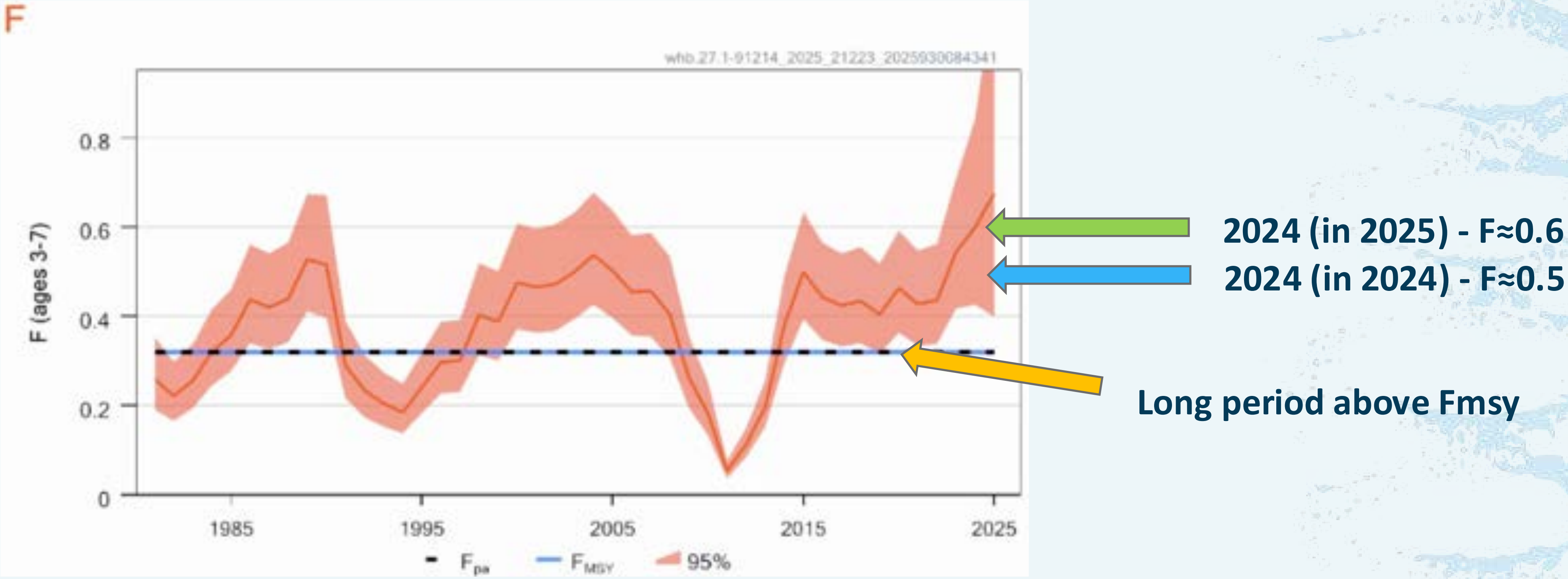
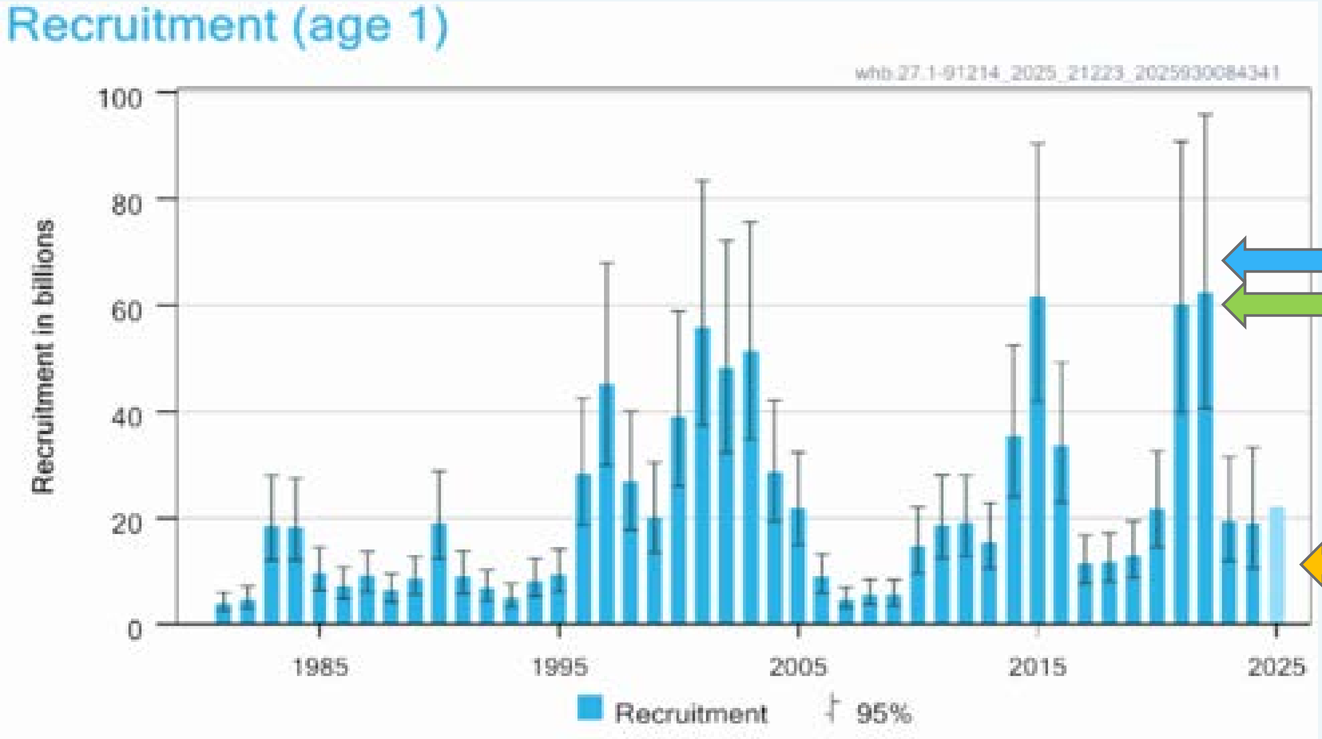


Latest ICES Advice

BW - Key points:

- A small downward adjustment in the point estimate of recruitment in 2021 and 2022 (from around 70 Bn to around 60 Bn).
- Future recruitment – no strongly positive signs (although 2024?)



2021/22 (in 2024) - 70 Bn
2021/22 (in 2025) - 60 Bn

Modest year classes (2025 may be bigger)

Latest ICES Advice

BW - Key points:

- ICES recommends a TAC of 851,344 (2025 was 1,447,054 t) = 41% reduction
- Relative to the expected 2025 catch (1,751,013 t) = 51% reduction.
- ICES noted:
  - "*The advice for 2026 is 41% lower than in 2025 because of a decline in stock biomass and a downward revision of the perception of the stock biomass over the recent years.*"
  - "*Both the 2020 and 2021 year classes are among the highest in the time-series and were fully recruited to the fishery in 2025. In 2026, the fishery will still largely depend on these two year classes, with 18% and 37% of the catch predicted to consist of fish from the 2020 and 2021 year classes, respectively. The history of the stock shows that subsequent years of low recruitment after a period of high recruitment may cause the spawning-stock biomass (SSB) to quickly drop to lower levels and would lead to a reduction in future advice.*"

ICES Advice: What we should pay attention to

- Different catch and outcome scenarios presented by ICES (Table 2).
- If advice followed, a small increase in SSB (5.3%) is predicted (no big recruitment coming).
- Catches at last year's level are predicted to reduce SSB by 18.1%
- If catches are only 20% less than last year, SSB still predicted to decline (by 9.1%)
- Coastal States TAC-setting meeting in diary for 22-23 October.

Table 2 Blue whiting in subareas 1–9, 12, and 14. Annual catch scenarios. All weights are in tonnes.

Basis	Total catch (2026)	$F_{age\ 3-7}$ (2026)	Spawning-stock biomass (SSB; 2027)	% SSB change*	% catch change**	% advice change***
ICES advice basis						
Long-term management strategy: $F = F_{mgt}$	851344	0.32	3838995	5.3	−51	−41
Other scenarios						
Maximum sustainable yield (MSY) approach: F_{MSY}	851344	0.32	3838995	5.3	−51	−41
F = 0	0	0	4669000	28	−100	−100
F_{PA}	851344	0.32	3838995	5.3	−51	−41
$SSB_{2027} = B_{lim}$^	3447737	2.8	1500000	−59	97	138
$SSB_{2027} = B_{PA} = MSY\ B_{trigger}$ ^	2556488	1.44	2250000	−38	46	77
$F = F_{2025}$	1561172	0.68	3162004	−13.3	−10.8	7.9
$SSB_{2027} = SSB_{2026}$^	1052983	0.41	3645039	0	−40	−27
$Catch_{2026} = catch_{2025}$ ^	1751013	0.79	2984052	−18.1	0	21
$Catch_{2026} = catch_{2025}$ −20%	1400817	0.59	3313434	−9.1	−20	−3.2

Coastal States Meeting

Aoife Martin

Coastal States Meeting (#1)

Blue Whiting negotiators met 29/30 September 2025 in London.

- **No progress** - largely driven by a of lack of focus or anything of substance framing the discussions.
- 4 short Head of Delegation meetings held - but nothing of significance emerged.
- Some bilateral meetings. The Chair was less optimistic about the success of these but some Coastal States considered they had been useful.
- Chair offered to present a draft record to the parties to document an agreement but preference from parties to focus on the figures. But no figures or proposals were tabled.
- No discussion on the ICES advice [*the proposed 41% didn't provide enough incentive to make progress this round*].
- Sense of paralysis. Chair questioned the value of these meetings and the value of the coastal state process as means to successfully manage fisheries
- Group now seems to be focused on how to take forward discissions rather than discussing actual sharing arrangements.
- Two options on progressing future discussions available but unclear which if any is preferred.

Coastal States Meeting (#2)

- **Individual Coastal State perspectives:**
  - **Faroes:** Highlighted that it is the largest CS for BW, with half the stock in its waters. A new agreement, reflecting the biological reality of the NEA is needed – committed to work towards this.
  - **Norway:** Focused heavily on the fact that Norway is the only country that has not increased its quota share unilaterally. Reiterated the action Norway has taken to date to try and deliver a resolution. Strong narrative that those parties that have taken a larger share in the past should take a greater hit now.
  - **Iceland:** Confirmed the lack of progress but that Iceland is ready to engage.
  - **EU:** Questioned the value of the two days, referenced the advice and the need for action, flagged the issue with Russia and reporting/compliance, and was adamant that something needed to change. [*Clear tension between Norway and EU coming through from each of the updates*]
  - **UK:** Expressed disappointment and frustration and highlighted that the situation is now more urgent. Committed to engaging further in the Autumn meetings.
- Next meeting: 21/22 September

NAPA Proposal

Aoife Martin/Rob Blyth-Skyrme

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NAPA Proposal

- Driven by frustration and impact on member businesses if no agreement is reached and the FIPs fail.
- Desk based analysis: assess how to structure an agreement under a range of scenarios
- Focused on three species as a collective
- Recognises the past but also the present reality
- Informed by four principles:
    - ✓ Recognition that concession and compromise is required by all – including NAPA.
    - ✓ Must be seen to be fair to all and clear where parties have gifted (compromised) and where they have gained. No extreme gains or losses.
    - ✓ Should be replicable across all three species.
    - ✓ Can be supported by the ‘whole’ supply chain.

NAPA Proposal - Analysis

- **Approach 1 – Weighted share**: Based on weighted relative shares of the total catch for each Coastal State for two periods – the historic period when there was comprehensive agreement (Period 1), and period since the end of agreement (Period 2). Historic weighting of 30% and 50% selected as options.
- **Approach 2 – Reference Period:** Compared relative catch shares as a % of the total catch for each Coastal State (last 10 and 20 years). For each species, timeframes reflect periods with and without agreement to different extents.
- **Approach 3 – Declared TAC:** Analysed annual declared TAC by Coastal State, as a % of the total TAC, over the last 5 and 10 years. Recognises Coastal State aspirations / expectations and that declared TACs are an asset used to access other fisheries.
- **Approach 4 – Aggregated Option: Aggregated outputs from Approaches 1 – 3 to take account of historic catches, current catches, and declared TACs – recognises the validity of Approaches 1 – 3.**

NAPA Proposal - Why Approach 4?

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- Best reflects the reality of the last 20 years
- Closest fit to the principles - the swing between gains and losses is small
- There are economic impacts – mackerel is key but largely driven by recent high prices – although less problematic when compared to significant TAC cuts.
- Benefits of **business certainty** and **security of tenure re quota shares**.

BUT

- Approach is not absolute – further refinement welcome if it helps secure an agreement.
- Access may provide additional leverage to help land an agreement.
- Dispute resolution mechanism is vital.

Approach 4: Collective results

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		Status Quo (Catch - mean % share of total for last 5 yrs - 20-24)	Declared quota (Mean % of the total for all parties for last 5 yrs - 20-24)	Approach 4: Result - Average of averages across all scenarios	Approach 4: Change compared to Status Quo Catch (mean % 20-24)	Approach 4: Change compared to Declared quota (mean % 20-24)
ASH	Norway	56.5	54.7	**55.9**	-0.6	1.2
	Faroes	13.7	15.9	**12.4**	-1.4	-3.5
	Iceland	13.6	12.9	**13.5**	-0.1	0.6
	Greenland	0.9	2.1	**1.7**	0.8	-0.4
	UK	0.7	1.2	1.0	0.2	-0.2
	EU	3.9	3.7	4.4	0.4	0.6
	Russian Fed.	10.7	9.5	**11.3**	0.6	1.8
MAC	Norway	24.4	22.7	**22.3**	-2.1	-0.5
	Faroes	10.8	12.3	**9.2**	-1.6	-3.1
	Iceland	12.5	12.2	**11.9**	-0.6	-0.3
	Greenland	2.5	4.9	**3.3**	0.8	-1.6
	UK	20.7	19.8	21.1	0.4	1.4
	EU	18.0	16.4	21.7	3.6	5.3
	Russian Fed.	11.0	10.8	**10.1**	-0.9	-0.8
BW	Norway	21.5	18.6	**23.9**	2.4	5.3
	Faroes	21.8	27.3	**21.9**	0.1	-5.4
	Iceland	17.3	16.2	**15.9**	-1.4	-0.3
	Greenland	1.6	0.4	**0.7**	-0.9	0.3
	UK	5.3	6.0	4.4	-0.9	-1.5
	EU	21.9	25.8	20.8	-1.1	-5.1
	Russian Fed.	10.6	5.7	**12.5**	1.8	6.8

NAPA Proposal: Engagement Update

- **Ministerial letter** (1) detailing the impact of the failure to reach an agreement on NAPA member businesses and (2) signposting that work on the NAPA proposal is underway sent to:
    - Each Coastal State Minister
    - President of the North East Atlantic Fisheries Commission (NEAFC)
    - Danish Government in its capacity as EU President.
- **Meeting invites** to discuss the proposal sent to:
    - Each Coastal State negotiating team
    - Catching sector representatives
    - NEAFC secretariat
- **Slide pack and a detailed FAQ document** addressing key questions on the proposal prepared for members and stakeholders.

NAPA Proposal: Engagement Update

- Steering Committee meetings with **Coastal States**:
  - UK Delegation (11 August and 15 August)
  - EU Delegation (19 August)
  - NEAFC Secretariat (13 August)
  - Faroe Islands Delegation (20 August)
  - Iceland Delegation (21 August)
  - Norwegian Delegation (28 August)
  - Norwegian Minister of Fisheries (18 September)
  - Greenland Delegation (1 October)
  - Scottish Government Delegation (2 October)
  - Letters to Russian representatives on NEAFC.
  - EU Long Distance Advisory Committee (15 October)

NAPA Proposal: Engagement Update

- Steering Committee meetings with **Catching Sector**
  - Part of UK catching sector (11 August)
  - EU catching sector: Netherlands/Ireland/Denmark (19 August)
  - Iceland catching sector (27 August)
  - Norwegian Delegation (28 August)
  - Iceland catching sector Deep Dive meeting (15 September)
  - Norwegian catching sector (25 September)
  - EU catching sector: Netherlands/Ireland/Denmark (Deep Dive meeting (15 September)
  - Faroese catching sector (tbc)

NAPA Proposal: Engagement Update

- Steering Committee meetings with **other parties**:
  - Brim (Iceland) (20 August)
  - LFV (Iceland) (21 August)
  - Arnalax (Iceland) (29 August)
  - Marin Trust (12 September)
  - First Water (Iceland) (19 September)
  - MSC (1 October 2025)
  - ASC (7 October)

- Meetings with NAPA members

Response (+)

- Strong interest in the proposal.
- Drivers for NAPA undertaking this work are understood.
- Recognition that something needs to change.
- Sense that no other party has looked at this with such rigour/detail
- Good engagement from some parties - keen to understand underlying data and scenarios.
    - Detailed, 'deeper dive' presentation prepared and presented to the Icelandic and EU catching sectors. Also offered to other parties.
    - A data pack is available for parties to review the underlying data - requested initially by EU and Icelandic catching sectors

Response (-)

- Difficult to make the distinction between catching sector and negotiators in terms of views – which is interesting.
- Concern State negotiators are paying lip service – perception that NAPA does not understand the issues or the negotiating objectives – correct in part but maintain that something new is needed.
- Strongly held views are driving positions which overshadow the numbers such that small % differences are being discounted:
    - Alignment with UNCLOS (UK/Norway)
    - Security of tenure (Greenland)
    - Remedying perceived past losses and inflated TAC setting by others (EU)
    - Some states should not be considered Coastal States and therefore no benefit due (UK)
    - Expectation that a greater share is warranted (Iceland-ASH, Faroes-BW, UK-MAC)
    - Zonal attachment should be a driver (UK/Norway) or should not be a driver (Greenland/EU).
    - Discount Russia (everybody other than the EU).

What next?

- Monitor Coastal State Activity over the coming weeks – mackerel is key.
- Increase efforts on the NAPA proposal (post CS meetings) - it provides a credible route to a solution.
- Focus on encouraging parties to engage and to use the NAPA proposal as the catalyst for constructive dialogue.
- Expect to engage with Ministers in late October.
- Requested to present proposal at NEAFC in November – supported by factual comms on the purpose/development of the proposal.

Blue Whiting Economic Study

Aoife Martin

Blue whiting: Assessing impact of FIP failure

- **Purpose:** assessing likely economic impact on the blue whiting supply chain if there is no sharing agreement in place by October 2026.
- **Who:** Andrew Johnson from MarfishEco on this project (MarFishEco Fisheries Consultants Ltd).
- **What:** Study will assess the impact on:
  - (1) feed manufacturers/salmon producers as the cost of sourcing alternative raw materials could rise making fish feed more expensive and
  - (2) fish meal and fish oil producers who may have lower input prices (if the landing price of blue whiting falls) but could see these offset by lower sale prices , although unlikely.
- Analysis focused on publicly available data and market-based assumptions.
- Important to involve key NAPA members to help understand context and test assumptions.
- **Timeframes:** Work due to be completed by the end of November.
- Potential to also present findings at NASF 2026.

Communications update

MWC

All NAPA Meeting

Verbal Update

NAPA Admin

Aoife Martin

Admin/Resource Update

- Since 2019 Seafish (UK government non-departmental public body) has supported NAPA.
    - Staff time (Aoife & Fiona)
    - Provided Treasury services – collected fees, managed contracts, paid invoices etc.
- Following a change in financial circumstances Seafish has now withdrawn support from NAPA (and other projects).
- Fiona is no longer available to work with NAPA.
- Steering Committee is exploring alternative options which should be in place by end of October.

What does this mean for NAPA members

- **Resources:**
  - Rob to continue as technical lead (4 days per month)
  - Aoife to remain involved (up to 8 days per month)
  - Option to:
    - Rescope the MWC contract to access some policy/membership engagement support. Or
    - Source additional support
  - Long priority list so while this is resolved please bare with us.
- **Financial:**
  - Prior to its recent decision Seafish had invoiced 15 NAPA members – those members that had provided the PO number.
  - Work is now underway to ensure all 15 businesses have paid their 2025/26 membership fees by the end of October.
  - Remaining 40 businesses will be invoiced in November. Unless advised otherwise you will be the key contact.
  - Aim: to collect all membership fees by end of January 2026 – your assistance is appreciated.

AOB

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