Sustainable fishing in the EU: state of play and orientations for 2026

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INTRODUCTION

European fisheries continue the trend from previous years of gradually improving their sustainability with more fish stocks fished at sustainable levels in 2024 than 2003.

However, efforts must also be made to tackle pressures <u>other than fisheries</u> that are increasingly affecting fish stocks. Example climate change impact in Mediterranean Sea.

In the context of existing challenges for the fisheries sector as well as enormous potential for sustainable fisheries the Commission has started an evaluation of the CFP Regulation (expected to be completed in early 2026), taking into account:

- the European Ocean Pact
- the Energy Transition Roadmap for EU fisheries and aquaculture.

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2. Progress in achieving MSY

Thanks to the continued efforts made by fishers and national administrations and the commitment from the EP, the Council and the Commission, **EU fisheries continue their progress toward more sustainability.**

Far fewer stocks are overfished in the EU today than 20 years ago.

The Mediterranean and Black Seas are home to multispecies fisheries with many stocks shared with non-EU countries. The fishing mortality rate has approached the sustainable level for some stocks, with seven having reached FMSY in 2022.

However, many stocks are still fished above sustainable levels.
Action requested to continue to reduce fishing mortality and reach the MSY objective, in particular through the Western Mediterranean multiannual management plan (‘West Med MAP’) and the 2030 strategy of the General Fisheries Commission for the Mediterranean (GFCM).

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2.1. Fishing opportunities in 2025 Western Mediterranean

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In the WestMed, due to mixed fisheries management, fishing opportunities are set mainly in terms of fishing effort.

After a five-year transition period, the objective to reach and maintain MSY by 1 January 2025 for demersal stocks in the Western Mediterranean applies. With the MSY objective and based on best available scientific advice, there were further reductions in effort for trawlers and longliners, plus lowered catch limits for deep-water shrimps and hake caught by netters.

To promote sustainable good practices and help hake stock recovery, **the compensation mechanism established in the Western Mediterranean since 2022 was expanded in 2025** to encourage further voluntary measures such as increased selectivity and closure areas allowing the sector to recover fishing days.

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2.1. Fishing opportunities in 2025 Mediterranean

With EU funding to support the transition to more sustainable practices, the socio-economic projections of fishing opportunities for 2025 point to similar profitability and economic performance as in previous years.

Implementation of related measures stemming from the GFCM multiannual plans, as well as of the newly agreed GFCM decisions for small pelagic and demersal stocks in the Adriatic, through the fishing opportunities for 2025

2.1. FISHING OPPORTUNITIES IN 2025
EUROPEAN EEL STOCK

Remains in a critical state: ICES advise to stop all fishing and other mortalities.

As a result, the minimum six-month closure period for any commercial eel fisheries in all waters in the Mediterranean continued in 2025, with certain exemptions already agreed in 2023 and 2024. Additionally, the prohibition of recreational eel fisheries was continued in 2025.

However, most Member States have not updated their national eel management plans, which leads to a situation where pressures on eels such as loss of habitat, are not being properly tackled. **Without specific action by Member States the eel stock will not be able to recover.**

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3. Balance between the fishing capacity of the Member States' fleets and their fishing opportunities

The size of the Member State fishing fleets continues to decrease (2024).
Number of UE vessels: - 3%
GT: -5%
Engine power: -3% respectively in 2024.

EU fishing fleet (1 January 2025): 69 570 vessels
1.245.871 GT and 5.062.245 kW.

However, several fleet segments are still out of balance

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3. Balance between the fishing capacity of the Member States' fleets and their fishing opportunities

However, several fleet segments are still out of balance

- As known, MS having 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, but some MS have not presented action plans and this is a problem.
- Furthermore, STECF has highlighted that some of the action plans provided do not have sufficient information to properly assess the possible impact on fleet balance.
- Some fleet segments continue to lack biological data to enable a comprehensive assessment of fleet balance.

EC calls on MS to increase their data collection efforts to properly assess the balance of the EU fishing fleet to ensure its competitiveness, resilience and economic viability.
In 2024 the Commission launched a study on the evolution, challenges and future of the EU's fishing fleet. (second half of 2025 for the results)

3. Balance between the fishing capacity of the Member States' fleets and their fishing opportunities (STECF)

Cyprus had 4 fleet segments with red economic indicators and 4 segments with a red biological indicator. Cyprus submitted an action plan in 2023 concerning overcapacity in one of these fleet segments comprising 4 vessels (out of a total fleet of 853) for action by 2025. It will tackle the overcapacity by permanently withdrawing two vessels or by modifying fishing gear.

Spain had 38 fleet segments with at least one red biological indicator and 14 fleet segments with at least one red economic indicator. Spain submitted an updated action plan with objectives clearly defined and the measures to achieve them being described.

France had 43 fleet segments with at least one red biological indicator and 11 fleet segments with at least one red economic indicator. France submitted an updated action plan including four new segments. The plan contains a wide range of general as well as more specific measures for imbalanced fleet segments.

Greece had 7 fleet segments, of which 1 had at least one red biological indicator. There were 5 segments with at least one red economic indicator. Greece has not yet presented an action plan despite the indications of overcapacity. An action plan is in preparation but was not submitted with the annual fleet report.

Red or green indicators are references to the Annex and mean that the indicators as assessed in STECF-23-13 possibly indicate an imbalance (red) or no imbalance (green). A further explanation is given in the STECF report. If Member States have not submitted an action plan, this means they consider their fleets to be in balance

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3. Balance between the fishing capacity of the Member States' fleets and their fishing opportunities (STECF)

Croatia had 20 fleet segments with at least one red biological indicator and 14 segments with at least one red economic indicator. Croatia continues its action plan to tackle overcapacity through temporary and permanent cessation and complemented with supplementary measures.

Italy had 20 fleet segments with at least one red biological indicator and 9 fleet segments with at least one red economic indicator. Italy has presented an updated action plan to tackle the overcapacity in its fleet. Italy's action plan presents different measures to reduce fishing effort, e.g. continuing previous measures and permanently ceasing activity.

Malta had 8 fleet segments with at least one red biological indicator and 4 segments with at least one red economic indicator. Malta has submitted an action plan which largely is a statement of intent to improve monitoring activities.

Slovenia had for biological indicators 12 fleet segments of which 6 segments had red indicators. No red economic indicators were identified. Despite the indications of overcapacity, Slovenia did not submit an action plan as it considers its activities extremely low and have insignificant impact.

Source: COMMISSION STAFF WORKING DOCUMENT Accompanying the document

4. Socio-economic outlook

- ✓ Fuel prices gradually decreased to EUR 0.6-0.7/l in the first quarter of 2025.
- ✓ At current prices, the EU fishing fleet can expect to produce a gross value added of around EUR 2.5 billion, cover its operational costs, and maintain jobs and salaries for around 120.000 fishers.

- ✓ Most national fleets are expected to be profitable in 2025
- ✓ Socio-economic analysis indicates that several fleet segments in major fisheries will still face challenging conditions, particularly those which are out of balance, depend on overfished stocks and/or use energy-intensive fishing gear.
- ✓ By contrast, fleet segments that are in balance, depend on stocks fished sustainably, have increased their energy efficiency, and tend to perform better and generate higher salaries for their crews.
- ✓ Energy remains one of the major costs for the EU fishing fleets. (EC will present a roadmap of the energy transition in fisheries (and aquaculture) in early 2026).

4. Socio-economic outlook
Social dimension

The ‘Fishers of the Future’ foresight study, completed in December 2024, examined the future role of fishers in society up to 2050.
It is important Looking at fishers’ hopes, fears, expectations and needs to better design policies that support sustainable, thriving, and inclusive fisheries for the long-term.

Furthermore it is important to ensure that fishing is an attractive profession for young people and better safety conditions can play a part in this. Without generational renewal, fishing will not continue to supply healthy food to markets across Europe and help to maintain coastal communities.

In 2024 the Commission launched a baseline study on the possible implementation of the International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel (STCW-F)

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5. Landing Obligation

Importance of data on landing obligation: researchers use the data recorded in logbooks and collected under the data collection framework to support scientific advice.

In December 2023 the Commission launched a study on the landing obligation, including an evaluation of evidence using the Better Regulation criteria: effectiveness, efficiency, relevance, coherence, and European Union added value.

The study will be published in June 2025. It will then also feed into the ongoing comprehensive evaluation of the CFP Regulation .

6. ORIENTATIONS FOR 2026 FISHING OPPORTUNITIES

Key stages to setting the next fishing opportunities

The Commission proposals:

- will be based on the best available scientific advice from ICES and STECF, subject to its availability and timing
- will also draw on decisions taken during consultations with Norway, UK and other coastal States, decisions taken by regional fisheries management organisations (RFMOs)
- **Will have a socio-economic analysis**.

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

Moreover, the Commission is working to achieve progress on sharing arrangements for widely distributed stocks with non-EU countries that lack such arrangements, to ensure shared stocks are fished in a sustainable manner.

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6.2. Fishing opportunities for the different sea basins

For the Mediterranean and Black seas:

- continue to pursue the objectives of the West Med MAP and of the GFCM MAPs. To this end, Member States should further strengthen the implementation of accompanying measures under their national EMFAF programmes, with support from the Commission where needed.
- With the permanent phase of the West Med MAP in place, the Commission proposal will aim to achieve and maintain MSY for all stocks. The Commission has also launched work with relevant scientific bodies to update the best available scientific advice for hake.
- Shared stocks management is also necessary to ensure sustainability in international waters and to secure a level playing field in the Mediterranean and Black Seas.

To this end, the proposal for 2026 fishing opportunities will cover measures stemming from the GFCM that are already in force and additional measures to be adopted by the GFCM at its 2025 annual session.

Conclusions

EU fisheries continue to improve their sustainability.

The situation in the Mediterranean and Black Seas has shown significant improvement.

Although the EU sea basins show average fishing pressures below the target reference points, certain stocks remain above the target.

Fisheries managers and stakeholders must continue their efforts to bring these stocks to the sustainable target levels.

Vigilance must also be maintained to stop any negative trends before they cause both short-term and long-term consequences for EU fisheries.

Member States must also step up their efforts to implement fully EU legislation, including to tackle the pressure on fish stocks stemming from activities other than fisheries.

A healthier marine environment is a condition for a more resilient and more prosperous fishing sector.

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CONCLUSIONS

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- Member States should also advance on the implementation of their EMFAF national programmes with measures that will support the green and digital transition of the fisheries sector and enhance its resilience.

- While factors other than fisheries continue to also have an impact on the state of marine ecosystems and fish stocks, it is important for fishers to continue their efforts for resilient and sustainable fish stocks.

- The Commission proposals for fishing opportunities for 2026 will continue to focus on enabling fish stocks to recover and maintain the progress made for stocks which have reached sustainable levels

The Commission invites Member States, advisory councils, stakeholders and the public to provide feedback on this Communication by 31 August 2025.

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