

Long Distance Advisory Council: NAPA – Intro & Proposal for a future sharing arrangement

15 October 2025



North Atlantic Pelagic Advocacy Group



What? Market-led approach

Who? 57 Supply-chain businesses committed to sourcing sustainable seafood **BUT** this is challenging.

Includes herring/mackerel processors, EEPOP, aquafeed companies, retailers and salmon producers.

Why? Securing Coastal State agreement on long-term sustainable management of blue whiting, herring and mackerel.

our Mission is simple -

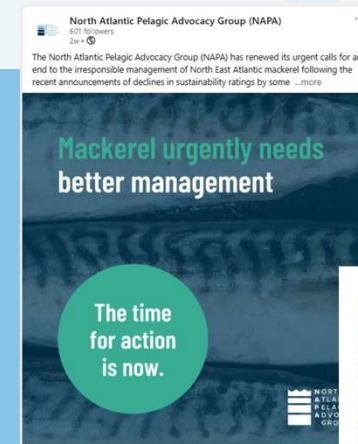
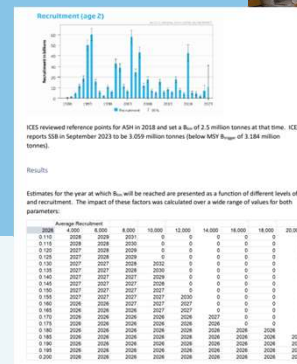
- **Science based management**
- **Agreement on a sharing arrangement**
- **Dispute resolution mechanism - for when things go wrong - because they will...**

How We Work?

- Established two 'Policy' FIPs
- Collective approach but species focused - the issues and outcome are common - but route to success differs by fishery

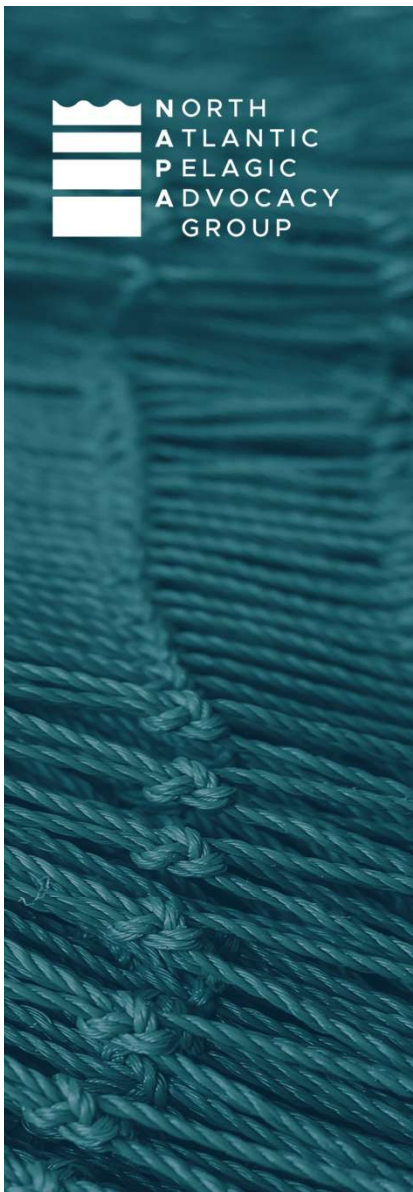
Our levers:

- Comms
- Advocacy
- Engagement
- Analysis





NAPA Membership



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NAPA Proposal - Context



- Currently Year 5 of the herring/mackerel FIP & Year 4 of blue whiting FIP
- Intensified engagement with Coastal States but very little has changed
- Perception – limited capacity for decision makers to reach an agreement – finger pointing, culture of blame, credibility of engagement (blue whiting proposal June 2025)
- Mackerel stock in crisis, blue whiting under pressure, and herring precarious.
- Mediation is needed – also recognised by parts of the catching sector
- Time is running out and unclear if decision makers grasp the seriousness for supply chain businesses

NAPA Proposal - Our response

- Opportunity for NAPA to take a different approach
- NAPA's non-partisan status is a benefit - not affiliated to any one Coastal State (unlike catching sector)
- NAPA takes a 'supply chain' perspective so we understand the full impacts of **No Agreement**
- Potential to act as a quasi-mediator by proposing an independent solution
- Can NAPA be the CIRCUIT BREAKER?



NAPA Proposal

- 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 - Approach 4

- Approaches 1 – 3 resulted in considerable variability in terms of perceived winners and losers (compared to the Status Quo – mean catch share for 2020-24).
- Perceived winners and losers change depending on the Approach and the model run within each Approach.
- **But** each approach has merit - based on actual data (catch and declared TAC) so can't be easily discounted.
- Basis for Approach 4 - calculating the average of the model runs under Approaches 1 – 3.
- No zonal attachment model – not possible to quantify stock distribution in time and space



NAPA Proposal - Approach 4 Findings

Approach 4: Average of all modelled runs in Approaches 1-3.

- Compared to any individual option, changes overall are less pronounced for each Coastal State compared to the Status Quo period (2020-2024).
 - MAC showed the most change, reflecting the greater variability in the fishery over time. Max. swing was 6.2% (+4.1% EU, -2.1% Norway).
 - BW swing was smaller, max. 3.7% (+2.4% Norway, -1.3% Iceland).
 - ASH swing was smallest, max. 2.3% (+0.9% Greenland, -1.4% Faroes).
- Almost all nations win and lose across the three species.
- Iceland exception – loss across all species, but relatively small (BW -1.3%, MAC -0.6%, ASH -0.1%).
- Results reflect the extended history in each fishery.



NAPA Proposal - Assessing Economic Impact

- Preliminary assessment of the economic impact of proposal by Coastal State (Approach 4), compared to the Status Quo (2020-2024).
- Focus on the **loss/gain in total landing values only**, based on ICES advice for 2025 and the 2022-2024 mean first-sale price (€, *Seafish data*).
- Estimated total annual first-sale value, all three species = €1.52B.
- Impacts on wider supply chain out of scope (see later updates).
- Recent price of MAC is a key driver for difference (1% MAC TAC = €8.5M, versus €2.8M for ASH, €3.9 M for BW).

Coastal State	Norway	Faroes	Iceland	Greenland	UK	EU	Russian Fed.
Total catch value (status quo)	450.9M	215.0M	211.7M	29.6M	198.5M	248.5M	164.7M
Approach 4 – First sale value change (€Millions)	-10.5 M	-16.9M	-10.8M	+5.6M	+0.4M	+27.9M	+1.1M
First sale value change (% from status quo)	-2.4%	-7.9%	-5.1%	+19.0%	+0.2%	+11.2%	+0.7%

NAPA Proposal - Why Approach 4?



- 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.

What would the NAPA Proposal mean for

EU Share

Species	Current share (% of total catch – 5 yrs) i.e., Status Quo	Current share (% of total quota – 5 yrs)	Approach 4 share (% of total catch)	Change against Status Quo (% of total catch)	Change against share (% of total quota)
MAC	18.0	16.9	22.1	+4.1%	+5.2%
BW	21.9	25.9	20.7	-1.2%	-5.2%
ASH	3.9	3.6	4.3	+0.4%	+0.7%



NAPA Proposal: Results



		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-	Approach 4		
				Result - Average of averages across all scenarios	Change compared to Status Quo Catch (mean % 20-24)	Change compared to Decared quota (mean % 20-24)
ASH	Norway	56.5	54.7	55.9	-0.6	1.1
	Faroes	13.7	15.9	12.3	-1.4	-3.5
	Iceland	13.6	12.9	13.5	-0.1	0.6
	Greenland	0.9	2.1	1.7	0.9	-0.4
	UK	0.7	1.2	1.0	0.3	-0.2
	EU	3.9	3.6	4.3	0.4	0.7
	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	-1.7	-3.2
	Iceland	12.5	12.2	11.8	-0.8	-0.4
	Greenland	2.5	4.9	3.2	0.8	-1.7
	UK	20.7	20.1	21.4	0.7	1.3
	EU	18.0	16.9	22.1	4.1	5.2
	Russian Fed.	11.0	10.8	10.0	-1.0	-0.8
BW	Norway	21.5	18.6	23.9	2.4	5.4
	Faroes	21.8	27.3	21.9	0.1	-5.4
	Iceland	17.3	16.2	15.9	-1.3	-0.3
	Greenland	1.6	0.4	0.7	-0.9	0.3
	UK	5.3	6.0	4.4	-0.9	-1.6
	EU	21.9	25.9	20.7	-1.2	-5.2
	Russian Fed.	10.6	5.7	12.5	1.9	6.8

