



EFFOP
Marine Nutrients Europe

President Report 2025



EFFOP - Marine Nutrients Europe

Annual General Assembly 2026

President Report

Welcome to the annual General Assembly of EFFOP - Marine Nutrients Europe, the Association of European fishmeal and fish oil producers.

EFFOP is pleased to present this report of the main activities and developments of 2025.

At a Glance

Our industry operates at the intersection of fisheries, aquaculture, animal nutrition and health and on a background of increasing geopolitical instability and increasing pressure on global supply chains our sector must address very diverse agendas.

Access to raw materials and sustainable fisheries management is a key concern, but an increasingly complex regulatory environment and tight global competition also cause concerns. As processors, we depend on certified, responsibly sourced raw materials - yet securing access to raw material and certification is becoming increasingly challenging.

At the same time, the blue economy is higher on the EU agenda, bringing renewed attention to how marine resources can contribute to food security, sustainability and economic resilience. This creates an important opportunity to ensure that blue foods, and our role in the value chain, are fully recognised in European policymaking.

Our industry plays a vital role in advancing blue growth and strengthening circular food and feed systems by maximising the value of marine resources, including fish trimmings and by-products that might otherwise be neglected. As such, we are not only contributing to more sustainable and healthy food systems but also to stronger and more resilient supply chains.

Membership

Since spring last year, we have welcomed one new associated member to EFFOP, further strengthening our association and reinforcing our representation at the European level. Unfortunately, our producer member in Latvia, has decided to leave the association by the end of 2026. We regret to see them leave and hope we can welcome them back again later.

Producer members are national associations or single producers from: Denmark, Estonia, Faroe Islands, Finland, France, Germany, Iceland, Ireland, Latvia, Malta, Norway, Spain, and the UK. Producer members are represented in the Executive Board.

Associated members are Alfa Laval, GEA, Haarslev, Norwegian Fishermen's Sales Organisation for Pelagic Fish, Hedinn, PerkinElmer, JFK, JS Proputec, 3A Biotech, Brimer, Fish Facts, JIMCO A/S, Fjell technology, FM Bulk handling, Brimer and Oestergaard.

2025 Budget

At the General Assembly in June 2024, a budget of 250,000 Euro was adopted for 2025.

The contribution of national members is based on the total production of the company (also when transnational) they represent. Fee calculation is based on production two years back, as this allows the Annual General Assembly to adopt the budget and fees for the coming year.

Associated members pay a fixed, uniform fee.

EFFOP Strategy

We follow the path laid out by the strategy adopted by the EFFOP board in November 2024 to shape the organisation's work over the 2025-2026 period and to strengthen EFFOP's role as **the representative voice of the European marine nutrients sector**. Its objectives are:

1. To promote effective collaboration between the EFFOP Secretariat and members, enabling a stronger collective expertise across the organisation.
2. To ensure that regulatory monitoring remains focused and timely, and that the interests of the industry are considered in the development of new EU policies and legislation.
3. To support certifications that provide value to EFFOP members through structured engagement with certification holders.
4. To encourage and facilitate active industry participation in relevant scientific research to strengthen our evidence base.
5. To further consolidate EFFOP's status as a key stakeholder in EU level discussions on marine food and related sectors.
6. To increase EFFOP's external visibility and to promote a balanced and positive narrative about the European fishmeal and fish oil industry.

The report is structured accordingly. Each section provides an overview of EFFOP's activities and progress over the past year, highlighting how our collective efforts have contributed to advancing these priorities.

Internal working organisation

To strengthen our technical capacity, the Secretariat has established several working groups.

The **Certification Group** assist the factories in implementing certifications requirements, such as MarinTrust and provides the secretariat with relevant information to use in our representation in Marin Trust committees.

The **Technical Working Group** focuses on feed regulations and contaminants, providing structured, expert input directly from factories. It serves as an early-warning mechanism for emerging challenges, supports coordinated data submissions, and facilitates collective input on technical and scientific issues, such as those related to undesirable substances in feed.

The main objective of the **Working Group on Food fish oil**, launched in 2024, is looking at developing industry guidelines to produce human grade fish oil in European plants processing animal by-products. This involves clarifying the regulatory framework set by the European Union, covering all relevant aspects of the fish oil production including raw material sourcing, production processes, food hygiene requirements and quality control measures, and storage.

EFFOP is also enhancing its internal **database capabilities** to provide accurate, relevant data in support of the industry's positions and advocacy efforts. This work is being supported through a new data-sharing initiative with IFFO and involving EFFOP producer members. The initiative aims to provide the Secretariat with structured access to selected member datasets, such as weekly raw material landings, enabling more effective monitoring of industry developments across the membership. Subject to member and board approval, this will also allow the Secretariat to provide timely, evidence-based input in external engagement and policy processes.

Addressing regulatory challenges

Fisheries management

Scientific advice and fishing opportunities

The Secretariat closely follows the activities of the **International Council for the Exploration of the Sea (ICES)** and the national and EU processes to adopt fishing opportunities.

We also follow ICES working groups on aquaculture and eco-system management, where concerns are raised on the impact of climate change on stock distribution and ecosystem dynamics.

EFFOP consistently supports policy makers in aligning decisions with the best available scientific advice. We believe that the good state and availability of fish stocks are essential not only for our sector's long-term viability but also for the health of marine ecosystems. Sound management must always be guided by the best available scientific advice from ICES.

EU-UK dispute on Sandeel

Since 26 March 2024, the UK has enforced a ban on Sandeel fishing in its North Sea waters, covering both English and Scottish jurisdictions. This measure has significantly reduced access for EU vessels. As this decision has a significant impact on both EU fisheries and European aquaculture production, EFFOP has followed the dispute closely.

We were present at the hearings convened by the Permanent Court of Arbitration in The Hague on January 28-30, 2025, with the participation of the Secretariat of Marine Ingredients Denmark, our Danish member.

On June 25, 2025, the UK government issued its statement on the final decision of the arbitral tribunal, confirming that the closure of the Sandeel fishery in UK waters of the North Sea will remain in force. The UK justifies this decision with the need to enhance the protection and recovery of the marine ecosystem and to achieve good environmental status.

EFFOP is concerned that this continued closure is based on national assessments rather than the independent and non-political scientific advice provided by ICES. By disregarding ICES assessments, the UK is undermining the shared understanding of what constitutes the best available scientific advice, an essential basis for both sustainable fisheries management and international agreements.

Northeast pelagic stocks allocations

Also in 2025, the Secretariat actively followed the **negotiations among Coastal States** on the allocation of pelagic stocks. Like many industry stakeholders, EFFOP has consistently urged policymakers to base decisions on the best available scientific advice and to reach a fair, long-term quota-sharing agreement that ensures the sustainable management of these vital fisheries.

Over the summer, EFFOP sent letters to all delegation teams urging them to show leadership and take an active and constructive stance in the upcoming rounds of Coastal State consultations. We stressed that the consequences for the entire value chain are real and growing, as certification schemes that are vital for market access and consumer confidence are at risk. Indeed, we highlighted the risk that feed producers and salmon farmers who depend on a stable supply of certified fishmeal and fish oil may be forced to seek alternatives from more distant waters, weakening Europe's strategic autonomy and increasing the environmental footprint of our supply chains. This outcome would represent a collective failure by leading fishing nations to protect shared resources.

Regrettably, despite sustained efforts, Coastal States have yet to reach a comprehensive agreement on the sharing of mackerel, herring and blue whiting quotas. This ongoing impasse continues to threaten the long-term sustainability of these important North Atlantic stocks.

Implementation of the revised EU Fisheries Control Regulation

Following the publication of the new EU Fisheries Control Regulation in 2023, we are now addressing the so-called delegated acts, with a particular focus on the conditions for monitoring the **landing and weighing of pelagic catches**. On 12 November 2025, the European Commission adopted detailed rules on fisheries control and enforcement aimed at harmonising procedures and reducing administrative burdens for Member States and operators. The new provisions entered into force on 10 January 2026, with certain requirements being phased in gradually until 2028 to ensure a smooth transition for both administrations and industry.

Throughout this process, EFFOP has provided input to the European Commission, submitted formal responses, and contributed through its participation in the Advisory Councils. It has been, and continues to be, a priority for us to ensure that all parties involved in landings and weighing adhere to the principles of independence and impartiality. Accurate measurement remains essential for both market integrity and sustainable fisheries management, and we continue to advocate for harmonised protocols and procedures across the EU for landings, species identification, sampling and catch weighing in support of fair, transparent and science-based fisheries management.

Blue proteins

Not only are marine proteins among the most nutritious and digestible sources of protein, but they are also exemplary in terms of sustainability. Europe has a unique strength in this area, with a well-established production capacity and high self-sufficiency levels. However, marine proteins are still absent from the current **EU protein debate**, which focuses mainly on plant sources.

This is why, during the summer, when the Danish Presidency put the protein debate on the agenda, EFFOP seized the opportunity to urge Member States to recognise the essential role of marine proteins in European aquaculture, food sovereignty, supporting the transition to a more sustainable and resilient protein supply.

We also reiterate the need for regulatory revision of the regulatory frameworks for animal by-products (ABP) and transmissible spongiform encephalopathies (TSE) and have put forward some concrete proposals: lifting the scientifically outdated ban on fishmeal in ruminant feed and extending the legal definitions of fishmeal and fish oil to include low-trophic aquatic invertebrates, thereby opening new, sustainable marine resources.

In addition, we advocate for a mandatory **labelling of health-related information on seafood products** to encourage healthier dietary choices. For example, well-fed farmed salmon will necessarily result in a high concentration of omega-3 in the fish. Labelling the omega-3 content of a farmed salmon fillet will therefore reflect both the good health of the fish and the good farming conditions. It would also provide consumers with valuable information about the nutritional benefits of their seafood choices.

Managing pollution and contaminants

Oceans and fish stocks are suffering when the environment degrades, which is why EFFOP is strongly committed to reducing marine pollution and improving the health of our oceans. Our industry faces the challenge of receiving raw materials that may be increasingly exposed to pollution. High water quality is essential to maintain healthy fish populations and ensure high quality seafood products.

We advocate for better implementation of existing EU policies on pollution and source reduction, especially for PFAS (per- and polyfluoroalkyl substances). Improving water quality through stricter controls and better monitoring will contribute to healthier marine ecosystems and sustainable fisheries.

Through our involvement in the development of the European Ocean Pact and Ocean Act, EFFOP has supported targeted measures and reduction initiatives in all Member States to ensure a cleaner marine environment, benefiting both ecosystems and the seafood value chain.

As EFFOP is committed to improving public health, the Secretariat has dedicated significant resources to monitoring and actively participating in regulatory developments on contaminants in animal feed. These efforts include membership in **EFSA's Contaminants Expert Working Group**, to which EFFOP contributed a substantial dataset on PFAS in August 2023. The organisation has also followed progress on other critical contaminants such as mineral oil aromatic hydrocarbons (MOAH) and mineral oil saturated hydrocarbons (MOSH), dioxins, polychlorinated biphenyls (PCBs) and dioxin-like PCBs.

Throughout 2025, findings and developments were communicated to EFFOP members, ensuring that factories are aware of any changes in the regulatory landscape or new risk assessments.

In addition, EFFOP contributed an industry perspective article on PFAS in marine ingredients to the magazine ***Aquafeed: Advances in Processing & Formulation***, highlighting the sector's responsible approach to this issue. The article underlined that robust monitoring programmes continue to show very low PFAS levels in aquafeed and farmed fish, well within EU food safety limits, and stressed the importance of proportionate, evidence-based regulation. It also emphasised that efforts to address PFAS should focus on reducing emissions at source, rather than placing disproportionate burdens on downstream food and feed operators.

EFFOP will continue to work closely with members, researchers and regulators to ensure that future discussions on contaminants remain science-based, proportionate and aligned with both environmental protection and food security objectives.

Fish oil intended for human consumption

EFFOP is addressing the regulatory barriers for European fishmeal and fish oil producers to access the food market by producing fish oil for human consumption.

Throughout 2025, we have been working on drafting **industry guidelines** to produce both food grade and non-food grade fish oil in the same factory, following a clear separation either spatially or according to a campaign calendar. DG SANTE delivered its comments in December on the first draft submitted by EFFOP.

These draft industry guidelines is a first step in our attempts to allow a harmonized interpretation of the legislative framework in Europe and enabling European factories to provide consumers with healthy omega-3 fatty acids from European fish stocks.

In parallel, the European Commission have been on fact findings missions in Denmark and Ireland in 2025/2026, and audits in non-EU countries as well, to get a better picture of the status of the industry. We hope that the findings here will facilitate a revision of some regulatory requirements unfit for purpose.

The work in the EFFOP working group is expected to resume towards the end of 2026. We would like to thank the members of the EFFOP working group for their continued engagement and valuable input to the Secretariat.

Energy transition

EFFOP has been a member of the Energy Transition Partnership since its creation in 2023. Throughout the year, we participated in the working group dedicated to the processing sector. The aim was to provide the European Commission with concrete recommendations for a holistic roadmap for the energy transition of the fisheries and aquaculture sector to be published in 2026. It was an opportunity for us to call for the inclusion of the fish processing and for Member States to provide the processing sector with support for industrial decarbonization through the Clean Industrial Deal State Aid Framework adopted in June 2025.

Certification Standards fit for purpose

Certification is essential for us to maximise the value of our products. In this regard, EFFOP plays an important role in coordinating European input to Marin Trust, MSC and ASC.

MarinTrust has been implementing version 3 of its factory standard since May 1, 2024. Through regular engagement, EFFOP has supported European factories members with technical assistance on a range of matters related to the new requirements which are important for internal due diligence efforts. EFFOP has also been a member of the fisheries development oversight committee since 2024, contributing technical feedback on several matters relevant to sourcing in the North East Atlantic and assessing whether the standard remains fit for purpose for members operating in the region. Developments arising from this engagement have been encouraging, and we look forward to further progress that will improve EFFOP members' access to certified raw materials in the future. We are also pleased that a new EFFOP representative has been appointed to the **MarinTrust Governing Body Committee**, which will further strengthen our support to our membership at the standard level.

Following the release of the **ASC Feed Standard**, the Secretariat repeatedly raised concerns with ASC regarding its social indicator framework for assessing the social sustainability of countries of origin of marine ingredients. Specifically, the methodology resulted in anomalous risk classifications where countries that ranked among the highest on the Global Slavery Index were classified as “medium risk” on the ASC Social Index. The ASC has now updated the Country Risk Scorecards in 2025, leading to more realistic risk calculations that are relevant to Europe.

We have also at raised concerns on several occasions regarding the **ASC salmon standard** and its restrictions on the use of fishmeal and fish oil in feed. These limitations apply specifically to marine ingredients, despite the absence of a clear scientific basis demonstrating that their inclusion negatively impacts sustainability outcomes. EFFOP has consistently highlighted that responsibly sourced marine ingredients are among the most nutrient-efficient and traceable feed materials available, and that any ingredient restrictions within certification standards should be evidence-based, proportionate, and aligned with recognised fisheries management and sustainability criteria. Recent scientific research, including life cycle assessment (LCA) and nutritional studies, increasingly demonstrates the opposite: the inclusion of marine ingredients in aquafeed can contribute positively to environmental and animal welfare outcomes. Evidence indicates benefits in areas such as reduced carbon footprint, improved water use efficiency, reduced eutrophication impacts in both marine and freshwater environments, as well as fish health, welfare, and overall nutritional performance.

Some of the fish stocks that are important to our industry cannot easily be certified under the current standards. For this reason, **EFFOP has assisted in drafting an alternative certification programme** tailored to the needs of our industry and pelagic fisheries. The aim is to provide the industry with a robust certification scheme that will complement the range of standards used in our value chains. By supporting the establishment of the Responsible Fisheries Foundation and collaborating with the owners of the CSI Standard, we have helped to establish a system for managing the certification of some European pelagic fisheries under an internationally recognised standard.

Building and sharing knowledge

Keeping EFFOP members informed

Keeping the members of our organisation informed is a key objective for the Secretariat. Whether it is providing information on regulatory and technical developments, sharing the work of ICES or reporting on discussions within the Advisory Councils on issues of importance to our industry, the team is committed to keeping EFFOP members up to date.

The working group format also provides a dedicated space for information exchange, allowing members to ask questions, share national news and discuss best practices.

Finally, EFFOP organises webinars on specific topics, as was the case last August when the proposal from the NAPA Steering Committee regarding the sharing negotiations between the Coastal States for the Northeast Atlantic mackerel, blue whiting and Atlanto-Scandian herring was presented in detail.

Life cycle analyses of European marine ingredients production

EFFOP has been actively coordinating with its member to support IFFO in its global **Life Cycle Assessment (LCA)** project with the **Global Feed LCA Institute (GFLI)**. The work has generated important new evidence on the environmental performance of marine ingredients, demonstrating significant differences depending on sourcing origin and production method.

Preliminary results show that fishmeal and fish oil derived from by-products have substantially lower carbon footprints than products derived from mixed-species fisheries. For example, fishmeal produced from by-products was calculated at approximately 539 kg CO₂e per tonne, compared with 1,285 kg CO₂e per tonne for mixed-species fishmeal. Similarly, fish oil from by-products showed a footprint of approximately 1,019 kg CO₂e per tonne, compared with 2,050 kg CO₂e per tonne for mixed-species oil.

When compared against commonly used alternative feed ingredients, including soy protein concentrate and animal blood meal, the findings further reinforce the strong environmental performance of marine ingredients, particularly those produced from by-products and circular raw material streams. The project has also highlighted the importance of methodological choices within LCA modelling, including the use of economic allocation, which significantly influences the reported footprint of co-products such as fish oil.

This collaboration aims to increase transparency and accelerate the transition to sustainable feed and food supply chains. While the marine ingredients industry has long prioritized transparency in sustainability metrics. Our objective is to move beyond simplistic metrics and adopt a more holistic, science-based approach through the use of life cycle analysis to objectively measure and define “sustainability” throughout our operations.

Throughout the year, EFFOP collaborates with IFFO on the project, helping the participating factories collect reliable, up-to-date data to strengthen the LCA analysis.

Partnership and Advocacy

Meeting activity

It is important to raise the voice of marine ingredients producers and tell our story.

To this end, the EFFOP secretariat has developed and strengthened closer contacts with relevant industry associations, as well as with relevant representatives of EFFOP member states in Brussels, European parliamentarians and representatives of the European Commission.

The Secretariat has been invited to several conferences and events and has set up meetings with industry associations and policy makers to discuss some of the most pressing regulatory issues as we have developed our legislative monitoring in areas such as feed, food, fisheries and environment. This leads to **strengthening partnerships and building new ones**, as well as developing new channels to communicate the benefits of European production of marine ingredients and highlight their role in shaping sustainable food systems.

European Strategic Seafood Alliance

We have also reached out to the newly established European Strategic Seafood Alliance, consisting of Seafood Europe, FEAP, EAPO, and Européche, to express our interest in joining. Given our position at the heart of the blue value chain, working upstream with fisheries management and downstream with aquafeed and aquaculture production, we believe our inclusion would strengthen the Alliance, and while it has not yet been possible to join the Alliance, we will continue to pursue this dialogue.

FEFAC: Circular Feed Platform

EFFOP is participating actively in the **Circular Feed Platform, led by FEFAC** and gathering several European business associations in the feed sector. Together we will deliver a catalogue of actions to improve feed circularity to the European Commission. These recommendations are illustrated by case studies of existing regulatory restrictions on feed circularity, mainly related to ABP and TSE legislations, of which 2 are from EFFOP: the use of fishmeal in feed intended to ruminants, the need to expand the definition of fishmeal and fish oil. The Catalogue could form the basis for the development of an EU Feed Circularity Roadmap and should be considered in the forthcoming reviews of the ABP, the Animal Feed Regulations and other EU initiatives.

North Atlantic Pelagic Advocacy

EFFOP is also a member of the **North Atlantic Pelagic Advocacy (NAPA)** since 2024 and actively participates in the Steering Committee and Working Groups. NAPA is an industry and retail coalition advocating for a sustainable, science-based agreement among coastal states for the management of mackerel, herring and blue whiting.

As part of this engagement, EFFOP participated in the North Atlantic Seafood Forum in March 2026, where Managing Director Anne Mette Bæk highlighted the need for political action, stating: *“The continued absence of a coastal states agreement is not an abstract governance issue. It directly affects raw material availability, price stability, investment certainty, and ultimately the competitiveness of Europe’s marine ingredients and aquaculture sectors. We urgently need political leadership and a workable agreement.”*

Ocean Stewardship Initiative

EFFOP’s managing director has also been invited to join the **Ocean Stewardship Initiative (OSI)** and attended a meeting with King Charles III March 2026.

Launched under the Sustainable Markets Initiative (founded by HM King Charles III), the OSI aims to translate global ocean commitments into actionable solutions by uniting industry leaders, policymakers, and conservation actors.

The initiative currently focuses on:

1. Antarctica: Supporting progress toward the Antarctic Peninsula Marine Protected Area and improving science-based management of the krill fishery.
2. OSI Playbook: Developing a framework to identify bottlenecks and unlock sustainable outcomes for conservation and fisheries management.
3. Exploring challenges in the Northeast Atlantic and how the private sector can contribute to solutions.

The OSI Playbook addresses key areas such as science, stakeholder engagement, industry alliances, diplomacy, and NGO collaboration.

The goal is for industry stakeholders to agree on solutions that can be presented to negotiators and state leaders, making it difficult for individual coastal states to reject them. King Charles III has expressed willingness to engage directly by convening meetings and contacting key political stakeholders.

EFFOP Board in Brussels

In November 2025, the EFFOP Board met in Brussels with stakeholders to discuss the strategic role of marine ingredients in promoting the circular blue growth of the fisheries and aquaculture sectors. A key meeting with **the European Commission's DG SANTE** focused on regulatory developments relevant to the sector, including the draft guidelines on fish oil production, the revision of maximum levels for certain contaminants in feed, and the upcoming PFAS monitoring framework. Further discussions with **the UK Mission to the EU** focused on sustainable resource management in the North Atlantic and on agreements between the UK and the EU. The EFFOP Board also exchanged views with partner organisations, including **FEAP** and **EAPO**, on the future of European aquaculture, pelagic stock management and certifications, as well as on sharing messages with policymakers regarding the consideration of blue foods in food policy. We further stressed the need for a holistic, science-based approach to ocean governance, water resilience and food security to **the Cabinet of the Commissioner for the Environment**, in which marine ingredients play a strategic role. Discussions with a **MEP from the PECH Committee** led to the planning of an event dedicated to our industry in 2026.

Finally, EFFOP works closely with **IFFO**, and we are delighted that the two teams are each taking part in each other's conferences and events.

European Advisory Councils

EFFOP is a member of **five EU Advisory Councils (ACs)**. This provides direct access to EU regulatory issues through the Pelagic AC, the Market AC, the Aquaculture AC, the Baltic Sea AC, and the North Sea AC.

We are participating actively in Working Group meetings as well as Executive Committee meetings for the Pelagic, Market and Baltic ACs, and General Assemblies.

In the **Market Advisory Council (MAC)**, discussions focus on how to strengthen the competitiveness of European producers and processing industries by promoting the high quality of products and the efforts made by companies in terms of sustainability, both on the internal and external markets.

The implementation of the **Common Fisheries Policy** and the **Common Market Organisation Regulation** in fisheries and aquaculture are the main regulatory instruments discussed. Regarding issues of importance to EFFOP, the areas of issues in the MAC, includes the presentation of the Commission's plans to introduce sustainability criteria in the new Autonomous Tariff Quota (ATQ) regime for fishery products, and the revision of maximum limits for inorganic arsenic in fishery products. EFFOP was actively involved in drafting proposals to STECF on the development of Fishery Sustainability Indicators, and in early 2026 took the initiative to request a MAC advice on PFAS in marine ingredients, reinforcing the sector's proactive and science-based approach to contaminant regulation.

The **Pelagic Advisory Council (PelAC)** has a consistent focus on **monitoring pelagic fish stocks** in the Northeast Atlantic. PelAC relies on ICES advice to formulate its recommendations on fishing opportunities for 2026.

PelAC has also continuously monitored the implementation of the **revised EU Fisheries Control Regulation** and voiced the concerns of its members. This was an opportunity for EFFOP to reiterate the need for common rules across Europe regarding monitoring the landing and weighing of industrial pelagic fisheries to obtain accurate data in a way that is beyond reproach to stakeholders. These issues were also addressed in exchanges with the European Commission and other ACs, including through a dedicated workshop. In addition, the PelAC informed the Commission that it was taking steps to address **fish welfare** in pelagic fisheries. PelAC has asked European institutions to be consulted on any process related to fish welfare in pelagic fisheries.

As an organisation representing both EU and non-EU members, EFFOP places particular emphasis on ensuring balanced representation in the advice developed within PelAC. Furthermore, EFFOP consistently highlights the importance of the non-human consumption sector within the blue value chain, recognising its significant role in the broader blue economy.

In the [Aquaculture Advisory Council \(AAC\)](#), we contributed to the development of a recommendation on industrial contaminant levels in aquaculture and climate change. Throughout the discussions, we emphasised to stakeholders that contamination is a systemic issue extending beyond the aquaculture value chain, and that contamination in marine ingredient sourcing regions can have significant knock-on effects for aquaculture feed security. While opinions differed regarding the primary objective of the draft recommendation, it was ultimately concluded that a more targeted recommendation would be developed by the AAC in the future. We also contributed to the AAC recommendation on domestication, which aims to promote the diversification of EU aquaculture through the development of novel species. In these discussions, we highlighted the importance of ensuring that diets for emerging aquaculture species meet all nutritional requirements, recognising nutrition as a fundamental priority for successful and sustainable species diversification.

In addition, we provided feedback to DG MARE on its Strategic Guidelines for the environmental performance of aquaculture document. In particular, we raised concerns regarding the promotion of certain novel ingredients despite a growing body of evidence that indicates sustainability trade-offs in the scientific literature. Here, we stressed the importance of Life Cycle Assessment as a holistic tool for evaluating sustainability across a broad range of environmental impact categories throughout the feed and food value chain. Furthermore, we participated in the AAC's first publicly held webinar on fish welfare, which emphasised the need for the EU aquaculture sector to address a broad range of health and welfare requirements if it is to achieve long-term sustainability.

The [Baltic Sea Advisory Council \(BSAC\)](#) closely followed decisions on the management of some stocks in the Baltic Sea. The AC formulated its input on **fishing opportunities for 2026 in the Baltic Sea**, following ICES advice. A workshop on predators (seals and cormorants) in the Baltic took place in October 2025. EFFOP participated in the workshop as well as in the development of the BSAC recommendations on seals. We reiterated our call for a better balance between conservation and management of seals, and that when measures are taken to manage seal populations, the legal framework must be adapted to allow for the exploitation of the harvested resources.

Since the beginning of 2026, particular attention has been given to the implementation of **the revised EU Fisheries Control Regulation**. EFFOP has via BSAC engaged actively in discussions held with BALTFISH and has maintained dialogue with national authorities from the Baltic Sea States on this issue. In addition, a major upcoming topic within BSAC is the development of a recommendation for the creation of a **rebuilding framework for Baltic Sea stocks**. EFFOP will work to promote balanced and pragmatic proposals in this process.

The [North Sea Advisory Council \(NSAC\)](#) has issued advice on pollution in the Skagerrak and Kattegat. As a member, EFFOP welcomes this focus on pollution, as a healthy marine environment is essential for the sustainability of fishmeal and fish oil production in Europe.

In parallel, NSAC and BSAC have produced joint advice on managing predators such as seals and cormorants, an issue EFFOP has addressed on several occasions. The advice highlights growing interactions between fisheries and predators in the North Sea and Baltic Sea, underlining the need for resilient fish stocks, better data, long-term monitoring, and stronger coordination through an ecosystem-based approach. EFFOP supports this as a constructive step towards balanced, science-based solutions that protect both fisheries and the marine environment for the future.

Communication and Visibility

In May 2025, the EFFOP Board confirmed the change of identity of EFFOP and the use of “Marine Nutrients Europe” in addition to EFFOP, to denote its identity.

Later, in November 2025, the EFFOP Board discussed the need for a more structured communications strategy. While EFFOP is active in policy discussions, there is a need to position the industry in the minds of key stakeholders and ensure that our messages and policy recommendations reach their intended audiences.

The secretariat recommended seeking external support to equip EFFOP with the tools needed to better frame the industry’s story and to communicate clear, consistent messages that remain relevant over time. The objective was not simply to develop new presentation materials or visual templates, but to help EFFOP rethink how we present our sector so that our voice is better heard, understood and considered by policymakers and stakeholders.

With this objective in mind, EFFOP engaged TalerAkademiet, at the beginning of 2026 to support the development of a more strategic communication approach, covering website development, social media content, advocacy messaging, industry positioning and the formulation of tailored key messages for different target audiences. Following an initial meeting, it was decided to move forward with this collaboration. A dedicated workshop with the Board was subsequently held, followed by a follow-up session.

The communication strategy will be presented on day two of this year’s member’s conference. We believe this work will help EFFOP communicate more effectively and ensure that our industry’s contribution to sustainable food systems, circularity and the blue economy is better understood.

EFFOP is active on **LinkedIn**, where we track key European stakeholders and share industry stories. As of May 2026, we have 1748 followers on LinkedIn – an increase of 12,8% over the past year.

Expanding our presence on social media platforms helps us to be more visible and reach more stakeholders, including professionals in and around the industry, as well as authorities from all EFFOP member countries and within the EU. We also send out **regular newsletters** to members and a wide circle of relevant stakeholders, with 266 people receiving our newsletter.

Thanks

I would like to end this annual report by thanking all EFFOP members, associated members, new and old, the Board for their trust and the Secretariat for their dedication and work. I am happy to leave the presidency of our organisation in the good hands of Johannes von Holten, to continue the fruitful cooperation within EFFOP and to promote that our industry is the key for the European circular blue growth.

Production status 2025

An overview of the fishmeal and fish oil production 2019-2025 is given in Appendix 1.

Odd Eliassen

President

Appendices

Appendix 1

Member reported raw material

YEAR 2025	WHOLE FISH	BY-PRODUCTS	TOTAL
SUM	1,943,271	706,477	2,649,748

Fishmeal production by members 2019-2025 (t)

YEAR	2019	2020	2021	2022	2023	2024	2025
FISHMEAL TOTAL	522.721	556.509	493.087	611.141	650.747	565.531	553.586

Fish oil production by members 2019-2025 (t)

YEAR	2019	2020	2021	2022	2023	2024	2025
FISH OIL TOTAL	137.577	159.475	155.568	233.362	199.394	145.294	158.649

Marine ingredient production by members 2019-2025 (t)

YEAR	2019	2020	2021	2022	2023	2024	2025
MARINE INGREDIENTS TOTAL	738,298	807,984	655,652	844,503	881,749	710,826	712.505

Appendix 2

By-products percentage of raw material 2025

See below

**Including registered by-catch*

