

Position paper on fishing opportunities and Coastal States negotiations for pelagic stocks for 2027

Main points

- Support for the TACs advised by ICES for **mackerel** (+102.42%, 352 938 tonnes), **blue whiting** (+25%, 1 064 191 tonnes), **Atlanto-Scandian herring** (+10%, 585 015 tonnes), **North Sea herring** (+21%, 396 680 tonnes), **western horse mackerel** (+6.7%, 79 223 tonnes), **greater silversmelt** (+24%, 22 865 tonnes) and **boarfish** (+13%, 33 543 tonnes).
- For **North Sea horse mackerel** (zero-catch advice), follow the advice, while also establishing a **bycatch quota** and ensuring improved data collection.
- Every effort should be made to **reach agreement on comprehensive sharing arrangements** for mackerel, blue whiting and Atlanto-Scandian herring, based on genuine historic track records and interest.
- **Targeted EU market actions** against excessive, unjustified unilateral quotas are critical, as well as the **limitation of mackerel summer fishery** in international waters and to ensure these are properly monitored and reported.
- Exponentially increasing Russian overfishing is putting additional strain on a cautiously recovering mackerel stock. Coastal States need to put in place **measures to prevent transshipping of mackerel**.
- For **Atlanto-Scandian herring**, **full access for the EU to Norwegian waters** should be immediately restored, or the EU share should be adapted for the payment for said access in 2007 (25% of the EU share).

General

After a dark year of decreasing pelagic fishing opportunities across the board, the ICES advice for 2027 provides a more positive outlook. Whereas increased TACs, notably for mackerel among other stocks, are offering hope for the near future, this is no time to be complacent. To help deliver on the positive outlook for several stocks for the next few years, it is crucial to put strong efforts into improving and/or expanding stock surveys (also managing ever increasing catches in international waters), data collection and assessment methodologies.

In addition to the positions taken below, the industry supports the recommendations by the Pelagic Advisory Council (PelAC) for these stocks.

Coastal States / Northeast Atlantic mackerel

Total Allowable Catch (TAC)

The most encouraging news from this year's pelagic stock advice is that the mackerel stock biomass is bouncing back to above critical spawning biomass levels (B_{lim}), with indications of improved recruitment in 2026. ICES has therefore been able to advise a TAC of 352 938 tonnes, 102.42% up from last year's advice. The industry supports this advice and believes that with

good management and cooperation between the Coastal States further improvement of the stock is possible to achieve.

At the same time, it is abundantly clear that we are not out of the woods. The stock is still feeling the impact of years of excess catches by all Coastal States except the EU (see below). The advised TAC for 2027 still sits at a lower level than the expected sum of catches in 2026 and Russia has been exponentially increasing its unilateral share to now over 20% of the TAC.

Interestingly, the mackerel survey results, helped by a larger covered area, continue to show a southward shift alongside stronger abundance in the northern North Sea and international waters. This underlines the importance of expanding survey coverage even further, with targeted surveys at the appropriate time of the year to as yet unmonitored areas west and south of the UK and Ireland, into the Celtic Sea and the Bay of Biscay. There are also strong signs that more mackerel would be found in the southern North Sea. For that area to be surveyed, solutions will have to be found to work around the acoustic limitations in shallow waters.

The EU continues to pay the price for the longstanding overfishing - up to 40% - by others. Action against this irresponsible behaviour is needed, as the most important and valuable EU pelagic fishery is at risk of being wiped out. The industry still considers it appropriate to formally request an STECF economic evaluation and also pursue support for resilience and retention of the EU fleet in proportion to said lost fishing opportunities.

In 2025 and 2026, operators in several Member States were confronted with retailers stopping sourcing mackerel on the basis of the ICES advice for 2026, some even when the stock was still above critical and precautionary limits. Some retailers chose to follow the premature 'red-listing' of EU mackerel for human consumption by fish consumption guides that follow a biased interpretation of the available science, differing substantially from the accepted ICES methodology.¹ With biomass moving out of the 'red zone', buyers and fish consumption guides alike should feel ready to review their approach to the sourcing of mackerel for the positive. Catching, selling, buying and eating mackerel from EU fishers are responsible things to do. Banning mackerel from EU stores does nothing to expedite a solution to the Coastal States consultations but does serious damage to the fish value chain of the only Coastal State acting responsibly: the EU.

Joint management and sharing arrangement

At the heart of the mackerel issue is still the overfishing by several Parties based on the systematic setting of excessive, unjustified unilateral quotas, in the absence of a comprehensive sharing arrangement between all Coastal States. This adversely impacts the fishing opportunities and market position of EU fishers. The industry is highly appreciative of the efforts by the European Commission in the consultations and for its condemnation of certain Coastal States' irresponsible behaviour – including the initiative towards a NEAFC measure on limiting Russian catches in international waters. However, this has continued to fall on deaf ears with several Coastal States.

¹ [EAPO/Europêche press release on red-listing EU mackerel for human consumption](#)

All the pressure possible needs to be put on those working against a successful, comprehensive outcome that reflects genuine, sustainable historic track records and interests. This should include exploring higher-level (political) negotiations and independent mediation. It also includes putting to use the EU's power as the main market for seafood exports from the other Coastal States, including application of select trade measures in the context of overfishing and non-cooperation

The four-party partial agreement and supporting bilateral agreements concluded in December 2026 between the UK, Norway, the Faroe Islands and Iceland do not stop overfishing. This deal effectively rewards the unilateral setting of excessive and inflated quotas by non-EU countries in recent years, which stray far from the shares applicable under the last sharing arrangement. The current overfishing should not be accepted to count towards an increased fishing track record for those Parties concerned. The EU is now the only remaining Coastal State showing restraint and responsibility through consistently sticking to the previous sharing arrangement. The collective self-declared share of the four parties totals 79.45%, leaving not enough space to accommodate the long-standing EU claim which is based on historical, sustainable track records and legitimate economic interest. The agreement does not only exclude the EU but also Greenland, while doing nothing to prevent overfishing by Russia. In this context, certain Coastal States appear to facilitate unmonitored Russian transshipment in their national waters and jurisdictions; combined with reported landings in certain ports, this enables that overfishing. This practice must be addressed comprehensively, and entry to these ports must be denied.

The industry calls on the Commission and the Council to stick firmly to the position that a flawed, one-dimensional concept of zonal attachment, advocated by Parties such as Norway, Faroe Islands and the UK, cannot serve as the basis for a sharing arrangement. Instead responsibly established track records should be respected, with a view to providing continuity, stability and predictability. As noted previously², there are too many caveats, gaps and uncertainties in the data on geographical distribution of the mackerel stock in the Northeast Atlantic. Evidence shows varying and very different migratory patterns. There is therefore very little sense in continuing the Coastal States Working Group on geographic distribution. The report produced by this Group makes no valuable contribution to the science around this stock as it mainly provides an interpretation of the ICES advice to justify arguments for unilateral mackerel share claims based on zonal attachment.

In terms of actual geographic distribution, it is clear the stock has contracted towards a more traditional distribution. Given this pattern, the access offered by the UK to Norway leads to intensified rather than restricted fishing effort, contrary to claims by the UK and Norway, on a contracting stock. Sadly, to justify their unwarranted unilateral quota, some Coastal States continue to fish for mackerel on the summer feeding grounds in the international zone, when the fish are in poor condition after the spawning migration. In international waters, mackerel are scattered across a wide area which means long trawling times, high bycatch and high fuel use for small, poor-quality catches. Significant portions of these catches are estimated to have been turned into lower value fishmeal and -oil. This is a wasteful practice that will have a long-lasting and damaging effect on the mackerel stock. Large increases in fishing effort by the Russian Federation, leading to significant unreported and unregulated catches, have also added to the decline in the stock. The industry considers it essential to set specific catch limitations in

² [EAPo position paper on Coastal States mackerel distribution report and consultations \(16 March 2022\)](#)

international waters, which need to be better managed and monitored. In addition, Coastal States need to put in place measures to prevent transshipping of mackerel.

Coastal States / Blue whiting

Total Allowable Catch (TAC)

The industry supports the ICES advice of a TAC of 1 064 191 tonnes. The stabilisation mechanism of the long-term management plan for this stock caps the increase at 25% rather than the +31% stemming from the model.

Surveys point to strong incoming year classes, leading to a substantial upward revision of recruitment estimates. While fishing mortality remains above target, spawning stock biomass is expected to rise significantly by 2027 and to keep growing in subsequent years.

The industry repeats its warning that the current upward trajectory of the stock, in line with its natural cycle, may well be disturbed by the continuing excess catches by some Coastal States. Better management would allow a large proportion of the stock to grow larger, benefiting the fishery for human consumption.

The industry looks forward to the upcoming benchmark (December 2026 – February 2027) as it offers a welcome opportunity to improve recruitment estimations and to expand data collection including the use of industry data.

Joint management and sharing arrangement

The industry urges all parties involved to finally reach a conclusion on a sharing arrangement without delay. The recent lack of consultations is unacceptable.

Any sharing arrangement should reflect the EU's genuine and traditional interest and track record as the biggest player in this fishery since its development. The fact that the EU's historic catches have been hampered by quota and access given to Norway to EU waters through the annual bilateral EU-Norway agreement (with Norway gaining a better track record in the process) also needs to be considered.

If no sharing arrangement is reached, the EU should continue to maintain the joint EU-UK share of 41.42% of the TAC (subsequently allocated between EU and UK based on the Trade and Cooperation Agreement).

As with mackerel, zonal attachment should not be the criterion on which to base a sharing arrangement. Data on geographical distribution is incomplete and inconsistent and therefore does not allow for clear conclusions to be drawn. The use of zonal attachment by other Parties is flawed and one-dimensional.

New access for Norwegian vessels to parts of EU waters should not be considered and only be offered in exchange for payment in 'real' fish (as opposed to 'paper fish'). It should also be conditional on a successful conclusion of relevant Coastal States sharing arrangements. Account

can be taken as well regarding the level of the quota transfers. With the value of blue whiting increasing, payment should also be required for access to EU waters beyond pre-Brexit levels.

Coastal States / Atlanto-Scandian herring

Total Allowable Catch (TAC)

The industry supports the ICES advice for a TAC of 585 015 tonnes, a 10% increase, based on the long-term management strategy in place.

The advice confirms the strong 2023 year class is having a positive impact on spawning stock biomass and surveys indicate that the 2024 year class is strong, with additional recruitment being reported from the Barents Sea. However, as with mackerel and blue whiting, substantial overshoots of fishing opportunities remain cause for significant concern. Those responsible should be actively pressed to change their behaviour and fish within their quotas.

The industry welcomes the initiative to integrate acoustic surveys and genetic sampling across the Northeast Atlantic to distinguish between overlapping herring stocks.

Joint management and sharing arrangement

The industry again urges all parties involved to finally conclude a sharing arrangement. It is highly disconcerting that no consultations have been held for almost a year now.

The EU has a consistent and predictable track record in terms of quota setting and catches for this stock, with a genuine and traditional interest. It therefore has a legitimate right to the share it currently claims based on previous arrangements and the presence of Atlanto-Scandian herring in its waters.

As with mackerel and blue whiting, zonal attachment should not be the criterion on which to base a sharing arrangement. Data on geographical distribution is incomplete and inconsistent and therefore does not allow for clear conclusions to be drawn. The use of zonal attachment by other Parties is flawed and one-dimensional.

In case full access for the EU to the stock in Norwegian waters is not immediately restored through the annual bilateral consultations, the EU share should be increased by the percentage with which the EU paid for access in 2007 (25% of the EU share, which went from 8.69% to 6.51% including the UK). In the absence of a sharing arrangement the EU should be paid back by Norway in quota. It cannot be stressed enough that this uncomfortable situation – no full access nor repayment of the quota share – has lasted for a prolonged period: the EU industry has been without the complete access that was paid for since 2021.

EU-UK-Norway / North Sea herring

The industry supports the ICES advice from May 2026 to set a TAC of 396 680 tonnes, based on the Long-Term Management Strategy agreed by the EU, the UK and Norway in 2025. This

represents a 38% increase compared to the previous ICES advice and a 21% increase compared to the TAC set for 2026 based on the management plan.

The industry reiterates ICES's advice that no activities that have a negative impact on spawning habitats, such as extraction of gravel and building of wind farms, should be allowed unless the effects of these activities have been assessed and shown to be non-detrimental. Gravel substratum is an essential habitat for herring spawning in autumn and these non-fisheries forms of spawning habitat degradation may decrease the early life-stage survival of herring. As for other pelagic stocks, there is a continuous need for more research to better assess the effects on the herring stock and recruitment of the greatly increasing abundance of windfarms, as well as predator populations. However, it should also actively be explored whether, after years of gathering evidence, there is enough data available now to finally make such assessments.

EU-UK / Western horse mackerel

The industry supports the ICES advice for this stock of 79 223 tonnes based on the MSY approach (+6.7% compared to last year's advice). Biological data is showing greater abundance as well as good individual fish weight and growth across age classes. Key indicators such as recruitment, fecundity and biomass are stable or improving, with recruitment now above the long-term average.

There are concerns about the technical issue with the acoustic equipment used in the WESPAS survey (also see below under boarfish), which if found to have been present in 2025 may have led to an underestimation of spawning stock biomass. Having no 2026 survey data point will be an issue for the assessment undertaken next year to produce the catch advice for 2028.

The lack of a dedicated survey for western horse mackerel remains a significant issue. The current multi-species surveys are sub-optimal due to species identification challenges and lack of fecundity measurements in egg surveys. The development of a targeted acoustic survey conducted at the appropriate time of year would strengthen the basis of the assessment and ultimately management. The industry specifically advocates the continuation of ongoing horse mackerel genetic stock-ID research. All evidence indicates that the stock extends into ICES Area 9.a and this is not currently accounted for in the assessment. Recommendations for both the dedicated acoustic survey and expansion of the genetic stock identification were included, along with several others, in the long-term research plan for horse mackerel in the ICES WKBHMB 2024 report³.

The industry would again like to draw attention to the longstanding and unresolved issue of the western horse mackerel TAC currently covering not just western horse mackerel (*Trachurus trachurus*) but mixed catches of *Trachurus* species, including *T. picturatus* (blue jack mackerel), and *T. mediterraneus* (Mediterranean horse mackerel). This combined TAC prevents effective control of single-species exploitation rates and results in unnecessary limitation of allowed catches of *T. trachurus*.

³ [ICES WKBHMB 2024 report](#)

Finally, similar to other stocks dealt with in this paper, there is a need to move towards comprehensive shared management. Norwegian fisheries in their own EEZ is now outside of that scope, given Norway sets a unilateral quota for the stock.

EU-UK / North Sea horse mackerel

For the third year in a row, ICES advises zero catch for this stock. The de facto fishery closure has had a visible impact on the EU fleet, with some vessels being tied up for lack of quota. There is a critical need to retain a bycatch quota to avoid choke situations and to help improve catch sampling while establishing an acoustic survey in the English Channel as part of a wider dedicated horse mackerel acoustic survey.

The industry accepts that with biomass being perceived as significantly below B_{lim} , a commercial targeted fishery is not likely in the near future, despite indications of more juveniles encountered in Danish fisheries. It needs to be understood that a long-term prohibition of targeted catches would jeopardise the future of this fishery but also impact the viability of those fisheries taking place in conjunction, around the same fishing grounds. The industry would therefore welcome any initiative to support rebuilding and to improve data collection, such as potentially ‘piggybacking’ the December herring larval survey in the English Channel with an acoustic survey.

Managers at the very least have a responsibility to avoid curtailment of catch data for stock assessment purposes coming in. Following the shift to a bycatch-only quota, biological sampling has collapsed drastically (down to 4.3% sampled), degrading the assessment model to an ICES Category 3 (trend-based) assessment.

There is an urgent need for more and better data, as illustrated by the fact that the survey feeding into the assessment is a bottom-trawl survey, which is not designed to target horse mackerel and shows low catchability. Relying on largely demersal bycatch (quota) for data has the same shortcoming. That means that additional sampling data is required to improve the advice for management of the stock. As mentioned under western horse mackerel, the industry also stresses the importance of the continuation of horse mackerel genetic stock-ID research, to which it heavily contributes. There is evidence of mixing between the western and North Sea stocks in the English Channel (divisions 7d and 7e).

Should the EU and the UK agree to set a bycatch TAC, as desired by the industry and as was the case for 2025 and 2026 for this stock and in 2023 and 2024 for western horse mackerel, it is imperative that the Commission and the Council ensure coordination and harmonisation of its implementation. The setting of bycatch TACs led to uneven implementation by Member States, with some applying additional restrictive measures and thereby jeopardising the level playing field. EAPO⁴ and the PelAC⁵⁶ addressed these issues in previous letters to the European Commission.

⁴ [EAPO Letter: The EU Commission’s ‘Bycatch Only’ Rule \(22 March 2023\)](#)

⁵ [PelAC recommendation on harmonising the implementation of the bycatch TAC for Western horse mackerel \(7 July 2023\)](#)

⁶ [PelAC letter on a North Sea horse mackerel monitoring TAC \(27 March 2025\)](#)

EU-UK / Boarfish

The industry supports the ICES advice of 33 543 tonnes, based on the MSY approach and representing a 13% increase compared to last year's advice. However, there are significant concerns regarding a technical issue with the acoustic survey (WESPAS). This manifested as a lower than realistic acoustic energy returned by boarfish shoals, leading to an underestimate of biomass of boarfish and other species (herring, horse mackerel, blue whiting) during the survey. This has resulted in the ICES Working Group on International Pelagic Surveys (WGIPS) concluding that the 2026 survey data should not be included in the assessment for producing the catch advice for 2027.

In 2025, the industry also voiced serious concerns about the reliability of the acoustic survey biomass estimate, which was unexpectedly 36% (158 000 tonnes) lower than the 2024 estimate. The level of decline in the index was not supported by the recent catches from the stock and contradicted the other indices in the assessment, which indicated an increase in biomass. Similar to what has now been observed in 2026, the analysis of the 2025 acoustic survey showed a decrease in the acoustic density of boarfish shoals across the survey area despite a similar number of shoals being detected. Though the survey was retained in last year's assessment as a valid data point, the industry requested that the raw survey data be rescruited to ensure that no errors had been made. To the best of our knowledge this exercise was not undertaken. There is increased concern now that there may have been a longer-term degradation of the acoustic equipment used on the WESPAS survey and that it was not only the 2026 estimate that has been impacted. These issues need to be fully and transparently investigated and the implications of any potential underestimations taken account of in future assessments of boarfish and other species impacted.

The industry reiterates that the boarfish stock has increased significantly since 2019, and the spawning stock biomass of this long-lived species is now approximately twice that of during the peak of the pre-management fishery in 2010. Stakeholder feedback indicates a considerable enlargement in the distribution of this enlarged stock biomass. Fishing mortality is set at an extremely low level relative to the stock size. This is primarily due to boarfish recruitment being defined as spasmodic, which means that episodes of strong recruitment are infrequent and irregularly occurring. Much needed research has commenced through an Irish PhD project to better understand the drivers of recruitment in boarfish. Additionally, through the Pelagic Advisory Council, the development of a Long-Term Management Strategy through Management Strategy Evaluation has commenced to take account of the specific life history and changes in the distribution of boarfish.

Boarfish being an unavoidable bycatch in the western horse mackerel fishery, choke hazards remain realistic and continue to increase for some Member States and fleets due to the landing obligation. Similar issues may occur for other (demersal) stocks under the landing obligation and for Member States which for some stocks have a very small or no quota of certain bycatch species.

EU-UK / Greater silversmelt

The industry can support the ICES advice of 22 865 tonnes based on the MSY approach (+24% compared to the previous advice). Since 2016, unilateral quotas have been set by the Faroe



European Association of Fish Producers Organisations
Northern Pelagic Working Group

Islands and EU/UK separately. With both the sum of unilateral quotas and catches exceeding recommended catches in recent years, it is high time for parties to reach agreement on the sharing of this stock.

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