



STECF EXPERT WORKING GROUP

TERMS OF REFERENCE The EU Fish Processing Sector. Economic Report 2025

Background and objectives

The economic report on the fish processing industry is one of the main sources of economic and social data for scientific advice on the performance of the EU fish processing industry. It is also increasingly used by scientific bodies, national administrations and international institutions.

Following the 2025 DCF/EU-MAP call for economic data on the EU fish processing sector, the EWG is requested to analyse and comment on the economic performance of the EU and national fish processing sector between 2013 and 2023 (2024 when available).

The final draft of the EWG report will be reviewed by the STECF.

The report should provide an in-depth look at the different factors affecting the economic performance of the EU fish processing industry with a **special focus on the major drivers and issues affecting the sector, in particular the persistent high operational costs driven by energy volatility, the ongoing structural challenges and policy-driven energy transition, and inflationary pressures along the value chain, initially exacerbated by the Russian invasion of Ukraine**. In addition to interpreting and explaining the quantitative results, the report should contain qualitative information and analysis on the drivers and trends in performance and other aspects of policy relevance based largely on the scientists' expert knowledge. The main objective of the report is **to obtain high quality interpretation of all data outputs** to ensure the usefulness of the report for DG MARE's policy development, Member States and the industry.

The analysis of raw materials is essential. When possible, raw materials should be analysed by species and origin. In the case of origin by whether it is coming from fisheries or aquaculture and whether if it is domestic or not coming from (other) EU countries or from non-EU countries.

Experts are asked to **analyse the sector and its components**, e.g. by markets and trade determinants (particularly imports) by main segments of processing activities (where data is available), competitiveness, market prices and consumption, certification, innovation, links and level of dependency with the local fishing fleet and aquaculture sector, the role of European Maritime Fisheries Fund support, contribution to the local communities and the Blue Economy, strengths, weaknesses, opportunities and threats.

Given the importance of the processing sector in many communities, **the socio-economic aspects** including trends on employment, salaries and labour productivity, shall need to be considered.

Structure and content

Being the basis for the structure of the report, the EWG is requested to work and comment on, at least, the following items:

An **executive summary** containing the key findings.

An **overview of the economic performance of the EU fish processing industry** (The report should mention indication on the evolution compared with 2013 base year. The latest developments should be presented in annual terms and not with respect to the previous report), including a comparative across Member States highlighting



the differences and similarities of national industries. This should include the drivers and main trends based on expert knowledge. It must include specific sections on:

- **EU overview chapter** on the economic performance of the fish processing industry providing¹:
 - EU fish processing sector overview (including recent developments).
 - Economic data and performance indicators (e.g. revenue items, cost items, earnings, profitability, etc.), including contrasting company size (e.g. SMEs vs. non-SMEs), when possible.
 - Specific data/trends on economic sustainability indicators
 - Trends and drivers up to 2023
 - Outlook for the years 2024 and 2025 (based on expert knowledge and external data sources)
- **National chapters** on the economic performance of the fish processing industry providing¹:
 - National fish processing sector overview (including recent developments).
 - Economic performance indicators, including by size category (e.g. contrasting SMEs and non-SMEs when possible).
 - Trends and drivers up to 2023
 - Outlook for the years 2024 and 2025 (based on expert knowledge and external data sources)
 - Specific national data coverage and quality issues
- **Special sections**
 1. Raw materials: data analysis on volume, species and origin
 2. *Nowcast: evaluating approaches for projecting economic indicators for 2024 and 2025*
- **Annexes**
 - Data coverage and quality.

Streamlining of the report and data issues

Efforts should also be invested in streamlining the structure and content of the report. In particular, the following should be taken into account:

The narrative should add value to the figures compiled in the charts and tables. This could be achieved by highlighting figures with special relevance and by explaining what are the drivers and/or consequences.

Where feasible, compare the main socio-economic indicators for fish processing with equivalent EU and national figures. (e.g., national average salaries, GDP, etc.), or in relations with the other fisheries sectors (the fishing fleet and aquaculture).

Given that under the EU-MAP, the transmission of data about the fish processing sector is only done on a **voluntarily basis**, the **use of complementary source of data (e.g. SBS and PRODCOM from Eurostat)** may be required for some countries.

When aggregating national indicators to obtain the EU totals, special attention should be given to maintain a homogeneous number of Member States. The data for **EU total** should reflect an estimation of the actual evolution and **should not be distorted by the inclusion (or exclusion) of Member States throughout the analysed period**. The compilation of EU aggregates may require the use of imputation in some Member States. The imputation of missing values should follow the principles approved by STECF (PLEN 19-02)..

¹ Given the use of EUMAP as well as Eurostat data, it should be clearly identified the source of data. A more detailed discussion about data coverage and quality issues could be included in an Annex.



EUROPEAN COMMISSION

DIRECTORATE-GENERAL FOR MARITIME AFFAIRS AND FISHERIES
Maritime Policy and Blue Economy
Economic analysis, Markets and Impact assessment

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The economic report on the fish processing industry **is produced on a biennial basis. This should be taken into account when presenting the information and making the interpretations**. Besides the long-term evolution analysis, a special focus should be made not only on the last year, but rather on the last two years, when relevant. Indications on the latest developments should be presented in annual terms and not with respect to the previous report (which would imply an increase or decrease over two years). The report should also present indications on the evolution compared with the base year.

A discussion and explanation about **data coverage, data issues** and how they were addressed should be included in an Annex.

Data transmission

As a matter of priority, the EWG is requested to ensure that all unresolved data transmission (DT) issues encountered prior to and during the EWG meeting are reported on-line via the Data Transmission Monitoring Tool (DTMT). Guidance on precisely what should be inserted in the DTMT, log-on credentials and access rights will be provided during the EWG.