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The Atlantic Africa fishery: Issues for ACP countries

1. Background and key issues

In a context where most EU fisheries agreements deal with access for EU fleets to tuna, West Africa is currently the only ACP region where the EU has agreements allowing EU fleets to access non-tuna resources (the so-called 'mixed agreements'). Because most of these non-tuna resources are also targeted by the local sector, such agreements have been widely debated, and important changes have been introduced in the new agreements, to address their impacts on the local fishing sector.

There are currently five Fisheries Partnership Agreements (FPAs) with West African ACP countries with a protocol in force: Mauritania, Cabo Verde, Côte

d'Ivoire, Gabon and São Tomé and Príncipe, with four ongoing negotiations for the renewal of protocols: Cabo Verde, Mauritania, Guinea Bissau, and São Tomé and Príncipe. A Sustainable Fisheries Partnership Agreement (SFPA) has also been signed with Senegal and is awaiting implementation. The EC has published an *ex ante* evaluation for a possible EU–Liberia SFPA and protocol to focus on tuna, but no formal negotiations have started. The protocol with Morocco – which has implications for EU fleet activities in other West African countries (because Moroccan waters in particular provide access to resources shared with other West African countries) – has recently been ratified by both parties.

As a result of the reform of the EU Common Fisheries Policy (CFP), more emphasis has been put on improving coherence between EU external fisheries policy, pursued through the SFPAs, and development cooperation. A first example of this has been provided with the latest SFPA protocol between the EU and Senegal, which is founded on joint actions to fight against illegal fishing.

“West Africa is currently the only ACP region where the EU has agreements allowing EU fleets to access non-tuna resources”

EU fishing companies have also traditionally entered into joint ventures with countries of the Atlantic coast of Africa (particularly with neighbouring north-west Africa, but also with South Africa and Namibia, for the exploitation of hake). The results of these joint ventures are varied, and often depend on the general level of fisheries governance in the country concerned.

“The results of fisheries sector joint ventures are varied – often depending on the general level of fisheries governance in the country concerned”

Several countries from the Atlantic coast of Africa are important sources of fish imports coming onto the EU market: Côte d'Ivoire and Ghana for tuna products; Senegal and Mauritania for demersal fish (e.g. sole); and Namibia and South Africa for hake. Exports from Senegal and Mauritania include significant suppliers sourced from the local artisanal sector.

Many of the countries of the Atlantic coast of Africa benefit from tariff preferences. Fisheries issues were often brought to the fore during the

Economic Partnership Agreement (EPA) negotiations with the EU, particularly regarding the rules of origin for tuna products. However, tariff preferences are only of value if other EU standards – sanitary and phytosanitary (SPS) and illegal, unreported and unregulated (IUU) requirements – can be met. In the last 12 months, two ACP countries from the region (Guinea and Ghana) have received a warning from the EU that they were not doing enough to combat IUU fishing. In the case of Guinea, this led to a ban on imports from Guinea into the EU market.

2. Latest developments

Sustainable Fisheries Partnership Agreements developments in 2013/14

Mauritania

The EU–Mauritania agreement is the biggest of the EU FPAs, both in terms of volume of catches and financial contribution. The ongoing protocol has been provisionally applied since 16 December 2012 but was only ratified by the European Parliament (EP) on 8 October 2013. Although its octopus fleet was denied access to Mauritanian waters, Spain is still the main beneficiary of the agreement.

There was considerable discussion over the financial compensation arrangements during the negotiations for the renewal of the EU–Mauritania SFPA. The EC argued that given the changes in the fishing zones for small pelagics, which reduced opportunities for EU vessels to catch fish, the level of financial compensation paid should be reduced. The Mauritanian

chief negotiator, however, argued that the financial compensation was a payment for fisheries access rights and should not be confused with fees paid calculated on the basis of the tonnage of fish caught (see *Agritrade* article '[EU and Mauritania restart negotiations for a Sustainable Fisheries Partnership Agreement](#)', 18 September 2014).

Central to the negotiations was the principle of allowing access only to the surplus of resources that cannot be caught by the local sector. On this basis it was argued that, in line with the previous protocol, no access should be granted to the octopus fishery. As a result, the union representing Spanish workers on cephalopod trawlers warned that some of the vessels excluded from Mauritania would soon be scrapped. Spanish authorities asked for the EU–Guinea Bissau FPA to be reactivated, and for fisheries cooperation with Guinea to be explored (see *Agritrade* article '[Octopus fleet excluded from Mauritania searches for new fishing grounds in West Africa](#)', 11 November 2013).

According to an evaluation study published by the European Commission, the EU paid €67 million of financial compensation for access rights, but has not yet paid the sectoral support of €3 million, since there are still unspent funds under the former protocol. The new protocol was not really effective in its first 6 months of operation: stricter technical conditions made activities less profitable for some EU fleets, and some vessels did not take up available licences. With the reformed CFP, a whole new set of issues will have to be addressed to ensure that the protocol meets the requirements as laid down for SFPAs (see *Agritrade* article '[Mauritania: Upcoming negotiations for the renewal of the FPA protocol](#)', 3 March 2014).

“The ‘non-discrimination clause’ in the EU–Mauritania agreement provides a guarantee for the local fishing sector that the sustainability criteria applied to EU fleets will also be applied to all other distant-water fleets”

EU and Mauritanian civil society campaigned in favour of the protocol, noting the benefits arising from the ‘non-discrimination clause’, which required the ACP country signing the FPA to apply the same technical and financial conditions agreed for EU fleets to all other foreign fleets. This provides a guarantee for the local fishing sector that the sustainability criteria applied to EU fleets will also be applied to all other distant-water fleets (see *Agritrade* article ‘[European Parliament endorses the controversial EU–Mauritania FPA](#)’, 11 November 2013).

Senegal

While Senegal was the first African country to sign a fishing agreement with the EU in the 1980s, the protocol was not renewed in 2006. However, EU companies have also been present in Senegal through joint ventures, and these continue. Indeed, in recent months a number of EU trawlers, no longer permitted to fish in Mauritanian waters, have transferred to the Senegalese flag.

“In 2013, the EU and Senegal renewed their dialogue for an agreement focusing not only on access issues, but also on the joint fight against IUU fishing”

In 2013 there was renewed dialogue for an agreement between Senegal and the EU that focused not only on access issues, but also on the joint fight against IUU fishing (see *Agritrade*

article ‘[Senegal–EU: Fight against IUU fishing as a basis for renewed relations](#)’, 3 March 2014). Fisheries access agreements with foreign nations are a sensitive matter in Senegal, and there has been criticism of the lack of appropriate participation of Senegalese stakeholders in the negotiation process (see *Agritrade* article ‘[EU and Senegal extend fisheries partnership](#)’, 16 June 2014). During the negotiations, it was made clear that access would only be granted to the surplus stocks. Given the state of the country’s hake stock, this led to concerns being raised over the allocation of fishing opportunities for hake under the SFPF protocol. This issue of access to the surplus does not arise for tuna agreements, since tropical tuna fisheries are managed by regional fisheries management organisations (RFMOs) – the International Commission for the Conservation of Atlantic Tuna (ICCAT) in the case of Senegal – and access to countries (such as EU or Senegal) is allocated at that level (see *Agritrade* article ‘[Senegal: Dakar seeks “a steady supply” for its tuna processing plants](#)’, 28 April 2014).

Nevertheless, despite the concerns expressed in regard to the hake fishery, the agreement reached under the draft 5-year SFPF protocol granted access to 36 vessels targeting tuna and two vessels fishing for hake in Senegal’s exclusive economic zone (EEZ). A total of €8,690,000 in financial compensation over the duration of the protocol was agreed.

Guinea Bissau

While a 3-year protocol was negotiated in 2012, it never entered into force following the military coup in Guinea Bissau in April 2012. This protocol provided the EU with fishing opportunities for tuna, cephalopods and shrimps. The EU and the government of Guinea

Bissau have both agreed to reactivate the ratification procedure of the SFPF.

“The evaluators highlight how the existence of a tuna FPA framework may improve the general governance of EU fishing activities”

To date, there have been discussions on issues related to increased cooperation in the fight against illegal fishing and the need for transparency in the use of EU fisheries sector assistance. In terms of wider transparency, the government of Guinea Bissau now publishes the agreements it has with foreign countries or companies, including the EU, Senegal and China.

Cabo Verde

Cabo Verde and the EU have started talks for the renewal of their fisheries agreement protocol. The current agreement authorises 28 European tuna vessels (16 from Spain and 12 from France) and 35 surface longliners (26 from Spain and 9 from Portugal) to operate in Cabo Verde’s EEZ. According to the evaluation study, the FPA between Cabo Verde and the EU was “more than satisfactory” due to the high level of the fish caught in Cabo Verde waters. For the new protocol, Cabo Verde authorities have insisted on exercising increasingly more rigorous control over their maritime resources and on accommodating the concerns of local fishers as regards the consequences of the FPA for employment and the food security for Cabo Verdean families (see *Agritrade* article ‘[Cabo Verde and EU start renegotiating their FPA](#)’, 13 January 2014).

Liberia

In Liberia there are some discussions about potential negotiations for SFPFs with new partner countries, including

potentially the EU. Because Liberia's EEZ has for decades been a major fishing zone for tuna vessels, foreign tuna purse seine fleets (French and Spanish) sought to negotiate an agreement with the Liberian authorities, in the form of a Memorandum of Understanding (MoU), which has been made public by the Liberian authorities. The evaluation study conducted by the EU particularly discusses the pros and cons of having a tuna SFPFA, or leaving it to the vessel owners to negotiate and finalise their MoU with Liberia. The evaluators highlight how the existence of a tuna FPA framework may improve the general governance of EU fishing activities (see *Agritrade* article '[An SFPFA could be in the mutual interest of the EU and Liberia](#)', 28 April 2014).

Action in Regional Fisheries Management Organisations

In the Atlantic, EU flagged fleets are mainly active in tuna fisheries. ICCAT is the relevant tuna RFMO in the Atlantic Ocean. Apart from ICCAT, there are other regional and sub-regional organisations that operate in the West African area, including the Sub-Regional Fisheries Committee (SRFC), comprising seven West African coastal countries, and the Ministerial Conference on Fisheries Cooperation among African States Bordering the Atlantic Ocean (ATLAFCO/COMHAFAT – an inter-governmental organisation composed of 22 African states).

In May 2013, the COMHAFAT and the EU Advisory Committee on Long Distance Fishing (LDAC) signed an MoU that establishes a framework of cooperation for promoting sustainable fishing. At the end of October 2013, they jointly organised a workshop in the European Parliament, on 'Improving good governance and [the] fight against IUU through the LDRAC–COMHAFAT

dialogue', gathering representatives from almost all COMHAFAT members' fisheries administrations, EU administrations, African and European fishing organisations and non-governmental organisations (NGOs). The setting up of a more permanent dialogue by means of a 'task force', between stakeholders from EU fisheries and the 22 African country members of the COMHAFAT, has also been agreed. It will provide an additional forum where both parties, through sustained exchanges and without the pressure of SFPFA negotiations, can increase mutual understanding. This forum may also play a key role when the EU starts to define an overall EU fisheries strategy for the Atlantic, as proposed in the EC communication on the external dimension of the reformed CFP (see *Agritrade* article '[LDRAC and COMHAFAT will collaborate to improve good governance in fisheries](#)', 13 January 2014).

Other EU fishing activities in the region

The EU is far from being the only foreign fleet interested in West African waters. China and Russia are ever more present in that area.

"The EU is far from being the only foreign fleet interested in West African waters – China and Russia are ever more present"

China has concluded a 4-year agreement with Guinea Bissau to catch shrimps, cephalopods and demersal fish, but with this covering the activities of vessels from only one Chinese company: China Fisheries National Corporation (CNFC). Other vessels of Chinese origin are active in Guinean waters under charter arrangements, with these four chartered vessels mainly providing fish to the local market (see *Agritrade*

article '[Guinea Bissau and the EU reactivate the procedure for an SFPFA](#)' 19 September 2014).

Traditionally the USSR operated the largest fleet by volume of catch, fishing for small pelagics. More recently Russia has concluded agreements with virtually every country on Africa's Atlantic coast, with bilateral agreements in place with Morocco, Mauritania, Senegal, Gambia, Guinea Bissau, Guinea, Sierra Leone, Angola, Namibia and South Africa. Agreements are currently being renegotiated with Sierra Leone, Gambia and South Africa. Although these agreements are primarily cooperation agreements, covering development work in areas such as research, fisheries surveillance and training, they also provide the legal framework governing access by the Russian fleet to the EEZs of African nations. Russian boats work seasonally in that they follow the small pelagic fish stocks, concentrating on mackerel and jack mackerel in particular. Unlike the EU fleets, sardinella is a second choice for Russian fleets (see *Agritrade* interview '[Russia has bilateral agreements with most African Atlantic coastal states](#)', 4 August 2013).

Coherence with development policy

The need to explore how EU–ACP fisheries partnerships might be aligned with the existing Cotonou Agreement framework, structures and tools was tackled during discussions in the EP on the EU–Côte d'Ivoire FPA. Common interests were identified, such as the fight against IUU fishing, and the necessary reinforcement of monitoring, control and surveillance capacities, as well as the need to improve coherence in the actions pursued under the different policies of the EU.

The government of Côte d'Ivoire requested the EU's support to enhance its capacity for monitoring, control and surveillance beyond the financial contribution of the FPA. The EP Development Committee's opinion on the EU–Côte d'Ivoire FPA supported this, highlighting that the actions taken under the SFPA "need to be coordinated with action funded under other EU development programmes, including the 11th EDF and the ACP Fish II programme, as well as Ivorian regional and national programmes" (see *Agritrade* article '[EP Development Committee stresses EU–Côte d'Ivoire FPA funds should be 'coordinated' with 11th European Development Fund \(EDF\)](#)', 11 November 2013).

Coherence with trade

While concerns had arisen in both Côte d'Ivoire and Namibia over the implications of the non-conclusion of the EPA process before October 2014, the conclusion of a West Africa–EU EPA in July 2014 and the subsequent conclusion of the SADC EPA process mean that these concerns no longer arise (see *Agritrade* articles '[Côte d'Ivoire to improve its access to EU tuna markets](#)', 26 October 2013, and '[Viability of Namibian fishing industry at stake?](#)', 2 December 2013). The Pacific Islands Forum Fisheries Agency noted in September 2014 that the conclusion of the EPA process in Ghana (which is the source of 5% of total EU tuna imports) would give a boost to a proposed tuna canning joint venture involving a Taiwanese tuna trading firm and a Korean fishing company. The factory is expected to process around 20,000 tonnes of canned tuna a year, of which 25% is to be pole-and-line caught. Analysts have argued that despite the importance of the regional market for processed products, Ghana would be unlikely to consider moving away from its current pattern of exports to the EU

market for tuna products (see *Agritrade* article '[Developments in Ghana–EU fisheries relations](#)', 8 October 2014).

"Increasingly important is the scope for developing an alternative supply chain between West African countries whose waters are resource rich, and countries where there is a large market for these fish"

In Namibia meanwhile, some fishing groups are receiving government encouragement and support to pursue market diversification and value addition. The production of value-added hake products is one emerging trend in the country, while another major trend is that mackerel is increasingly taking over from hake as the main fisheries income generator. Horse mackerel, perceived by many as a low-value product, is showing great potential due to its popularity on the African market. Value-added horse mackerel products, such as smoked horse mackerel and horse mackerel soup, are also being developed (see *Agritrade* article '["Namibia fish should not be held hostage by any single market," says minister](#)', 22 July 2013).

In January 2014, Nigeria's Federal Ministry of Agriculture and Rural Development announced that fish imports, particularly of frozen small pelagics, would gradually be banned in order to promote local production. The fleets (including Russian and European) selling mainly frozen small pelagics to Nigeria have expressed concerns over this proposed measure. Discussions have been held on why imported frozen small pelagics are cheaper than locally produced fish, with it being noted that imported frozen small pelagics are partly coming from Mauritanian and Moroccan fishing grounds, caught by EU (through FPAs) and Russian

trawlers (see *Agritrade* article '[Nigeria: Structured embargo on frozen small pelagic imports from January 2014 confirmed](#)', 27 January 2014).

One related issue which is gaining in importance is the scope for developing an alternative supply chain between West African countries whose waters are resource rich, particularly for small pelagics (Senegal and Mauritania) and countries where there is a large market for these fish (e.g. Côte d'Ivoire, Ghana, Nigeria). Lately, Mauritanian artisanal fishermen have been looking at developing a small fleet of artisanal seiners for catching small pelagics. If Senegalese and Mauritanian artisanal fishers have priority and are able to secure access to these resources under a regional management scheme, it may give a boost to the development of trade in artisanal 'fish for processing' in the West African region (see *Agritrade* interview '[We should develop an alternative fish supply chain based on artisanal fisheries](#)', 15 January 2014).

Implementation of the EU illegal, unregulated and unreported fishing regulation

West Africa has been identified as a region where IUU fishing constitutes a major obstacle to the establishment of sustainable fisheries.

Côte d'Ivoire made the fight against IUU fishing a priority of its new SFPA protocol with the EU. The government of Côte d'Ivoire has urged that the catch certificates used for complying with the EU IUU regulation should be integrated into the TRACES system (see *Agritrade* article '[Côte d'Ivoire to improve its access to EU tuna markets](#)', 26 October 2013). The government has already sought to use the TRACES system to improve its capacity to comply with EU SPS

conditions. (The TRACES system is an EU tool that facilitates access to EU markets, through the use of electronic transmission of sanitary certificates to EU sanitary authorities.)

Senegal has been experiencing illegal fishing activities in its EEZ and is willing to reinforce its capacities to tackle such activities that are threatening its fisheries resources and activities. Consequently, the fight against IUU fishing is at the heart of the SFPAs recently concluded with the EU. This SFPAs was signed only a few weeks after a Russian trawler, the Oleg Naydenov, was arrested by Senegalese authorities for IUU fishing, highlighting both the political will of Senegal to combat IUU fishing, and the limitations of its current monitoring, control and surveillance capabilities (see *Agritrade* article ‘[Senegal–EU: Fight against IUU fishing as a basis for renewed relations](#)’, 3 March 2014).

“Following the naming of Guinea as a non-cooperating state, the situation is complex – Guinea has IUU issues to solve both as a flag state and as a coastal state”

Regarding the implementation of the EU IUU regulation, Guinea was identified (together with Belize and Cambodia) as a ‘non-cooperating country’. Shortcomings in these countries were identified, relating to poor fisheries management, poor implementation of control and monitoring measures, and the lack of credible sanction mechanisms. The EU has not only banned the importation of fish products from these three countries, but has also stopped EU vessels from fishing in these countries’ waters, whether under fisheries agreements or joint ventures. While NGOs have welcomed this decision, the EU fishing sector regards the sanctions as ‘toothless’,

because IUU fish caught in Guinean waters can still find their way onto international markets (see *Agritrade* article ‘[Legal operators affected by EU blacklisting of Guinea, Belize, Cambodia for non-cooperation against IUU fishing](#)’, 28 April 2014).

The Guinean situation is complex, because Guinea has IUU issues to solve both as a flag state and as a coastal state. Guinea therefore needs to engage in reform of its overall fishing policy, for which political will, and financial and human resources, are necessary (see *Agritrade* article ‘[EU IUU regulation: Fish import bans to be proposed against Guinea, Belize and Cambodia](#)’, 23 December 2013). Efforts have been made in a regional framework to bring all stakeholders together to diagnose causes and solution for dealing with IUU fishing activities (see *Agritrade* article ‘[Slow progress in Guinea’s efforts to combat IUU fishing](#)’, 11 November 2013).

Since December 2013, other countries targeted under the EU’s IUU regulation have begun developing new legislation and improving their monitoring and control surveillance systems. Dialogue with these countries has been extended until the end of 2014, when their progress will be evaluated (see *Agritrade* article ‘[Legal operators affected by EU blacklisting of Guinea, Belize, Cambodia for non-cooperation against IUU fishing](#)’, 28 April 2014).

In Ghana, the EU pre-notification provoked concerns and reactions. But, according to Ghana, very few details were known about the criteria that have been applied by the EC in the run-up to the pre-notification. This apparent lack of communication regarding the information on the criteria used by the EC has given rise to criticism in Ghana, as it is felt that the reports and recommendations from EU inspections

should be made public in order to clarify how EU regulations are to be applied (see *Agritrade* article ‘[EC “yellow card” for Ghana and South Korea – steps to be taken to avoid blacklisting](#)’, 23 December 2013).

3. Implications for ACP countries

Capitalising on the changes introduced in SFPAs to improve prospects for sustainable development

Because of their abundant and diverse fish resources, and proximity to the EU markets in the case of West Africa, fisheries relations between the EU and Atlantic African countries are very developed and varied. SFPAs with countries of the region include the most important and complex the EU has with third countries. A number of issues that have been addressed in the latest SFPAs potentially increase the social and economic benefits accruing locally.

“Discussions over the renewal of the EU–Mauritania SFPAs have introduced a potentially new basis for envisaging access costs for EU fleets”

In particular, the discussions over the renewal of the EU–Mauritania SFPAs have highlighted important issues regarding the promotion of joint ventures through EU–ACP fisheries relations, and have introduced a potentially new basis for envisaging access costs for EU fleets, namely the development of local processing and value addition as an integral part of joint venture arrangements. Provisions have been included in the

Mauritania–EU SFPAs that require the compulsory landing of all catches. This provides the basis for moving towards increased local processing and value addition, provided of course that local infrastructure and local technical capacities can be enhanced. In the Mauritanian case this involves Spanish harbour operators planning with their Mauritanian counterparts the transfer of technologies, infrastructure, procedures and know-how in order to develop value-adding landing/processing infrastructures in Mauritania, which is an interesting path to explore. Sectoral support provided under the SFPAs, as well as EDF support, could play a facilitating role in achieving this. This approach is potentially of far wider interest to coastal and island ACP countries.

Another key issue discussed in the Mauritania–EU SFPAs was the basis for financial compensation. Should it be proportionate to the level of fishing possibilities, to ensure value for money for the use of EU taxpayer money or should the fact that the EU has priority access to surplus before third countries be encompassed in the setting of compensation? Issues also arose with reference to the nature of sector support programmes and the relationship with EDF aid deployment.

These questions suggest a need for ACP governments who are planning to sign SFPAs to open a dialogue with the EU about the new ‘post CFP reform’ basis for setting the level of financial compensation.

Making the fight against IUU a priority

As seen in the last 12 months, the EU IUU regulation can impact deeply upon Atlantic African countries, both through the impact of import bans

and through the impact on private joint venture arrangements. More generally, IUU practices not only represent economic losses for countries involved in the fisheries, including fishing communities, but also jeopardise sustainable fisheries management. It is of paramount importance that ACP countries (particularly in West Africa where IUU fishing is particularly prevalent) vigorously address IUU issues in order to maximise the long-term benefits that can arise from building up their own processing/exporting sectors and from protecting the interests of local fishing communities dependent on access to healthy fish stocks.

Diversifying partners, markets and clients

The development of an EU fish export-oriented industry in Atlantic African countries has certainly been boosted by the prospect of maintaining free access to the EU market through the EPAs. However, this has placed countries in a somewhat vulnerable situation, considering their high dependence on EU markets for these products. In some of the countries (e.g. Angola, which had developed joint ventures with EU companies such as Pescanova) this dependence was even more entrenched, given the way that joint fishing ventures had been operated, fully relying on the parent company for financing.

In the context of new foreign companies’ interest in the rich fisheries resources of West Africa (particularly the pelagic fisheries in Senegal and Mauritania) and the rich potential demand for pelagic fish on regional markets (Côte d’Ivoire, Ghana and Nigeria), a critical consideration in market development for structural transformation is the establishment of alternative supply chains which link artisanal pelagic fishing areas to regional market demand.

In the first instance, countries will need to ensure that local fleets are given priority over foreign ‘super trawlers’ (from Russia, China and the EU), but when it comes to accessing pelagic fisheries resources, countries will also need to adopt practices that facilitate transport of fish across the region, for example implementing the Customs Convention on International Transport of Goods, so that fish can travel throughout the region in refrigerated trucks without containers being opened at borders, thus disrupting the cold chain.

Main sources

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This brief was published in December 2014. Other publications in this series and additional resources on ACP–EU agriculture and fisheries trade issues can be found online at

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CTA operates under the framework of the Cotonou Agreement and is funded by the EU.

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