

NORTH ATLANTIC PELAGIC ADVOCACY GROUP

IMPACT REPORT

North Atlantic Pelagic Advocacy Group (NAPA)

April 2025 - April 2026



VIEW FROM AOIFE MARTIN, EXECUTIVE CHAIR OF NAPA

Since 2020, NAPA has worked relentlessly to secure a sustainable future for mackerel, blue whiting and Atlanto-Scandian herring in the North East Atlantic. As the voice of the global marketplace, we have united nearly 60 international seafood businesses across the supply chain - fishmeal producers, aquafeed manufacturers, salmon farmers, seafood processors, distributors and retailers - behind a shared commitment to improving the management of some of the world's most economically and environmentally significant fisheries.

Through our two pioneering, supply-chain-led Fisheries Improvement Projects (FIPs), we have consistently championed three fundamental priorities: following scientific advice, establishing a comprehensive catch-sharing arrangement, and implementing an effective dispute-resolution mechanism. Over the past year, as both FIPs have approached their conclusion in October 2026, we have intensified our efforts to ensure these priorities remain firmly on the agenda of Coastal State decision-makers.

Our work has helped maintain unprecedented market pressure for change at a critical moment for these fisheries. Over the last 12 months, we have brought industry voices directly into international policy discussions, launched targeted campaigns across all three pelagic species, developed a practical model sharing agreement to support negotiations, and engaged extensively with ministers and negotiators responsible for shaping the future of these stocks. Together, these efforts have reinforced a clear message: the global marketplace expects responsible management and long-term sustainability.

Yet the challenges facing these fisheries have become increasingly stark. In September 2025, mackerel catch advice was reduced by 70%, reflecting a significant decline in stock size and underscoring the consequences of continued management failure. The impact was felt throughout the supply chain, with early signs of buyers beginning to move away from mackerel products. This development reinforced the urgency of NAPA's mission and the importance of securing lasting solutions before further economic and environmental damage occurs.

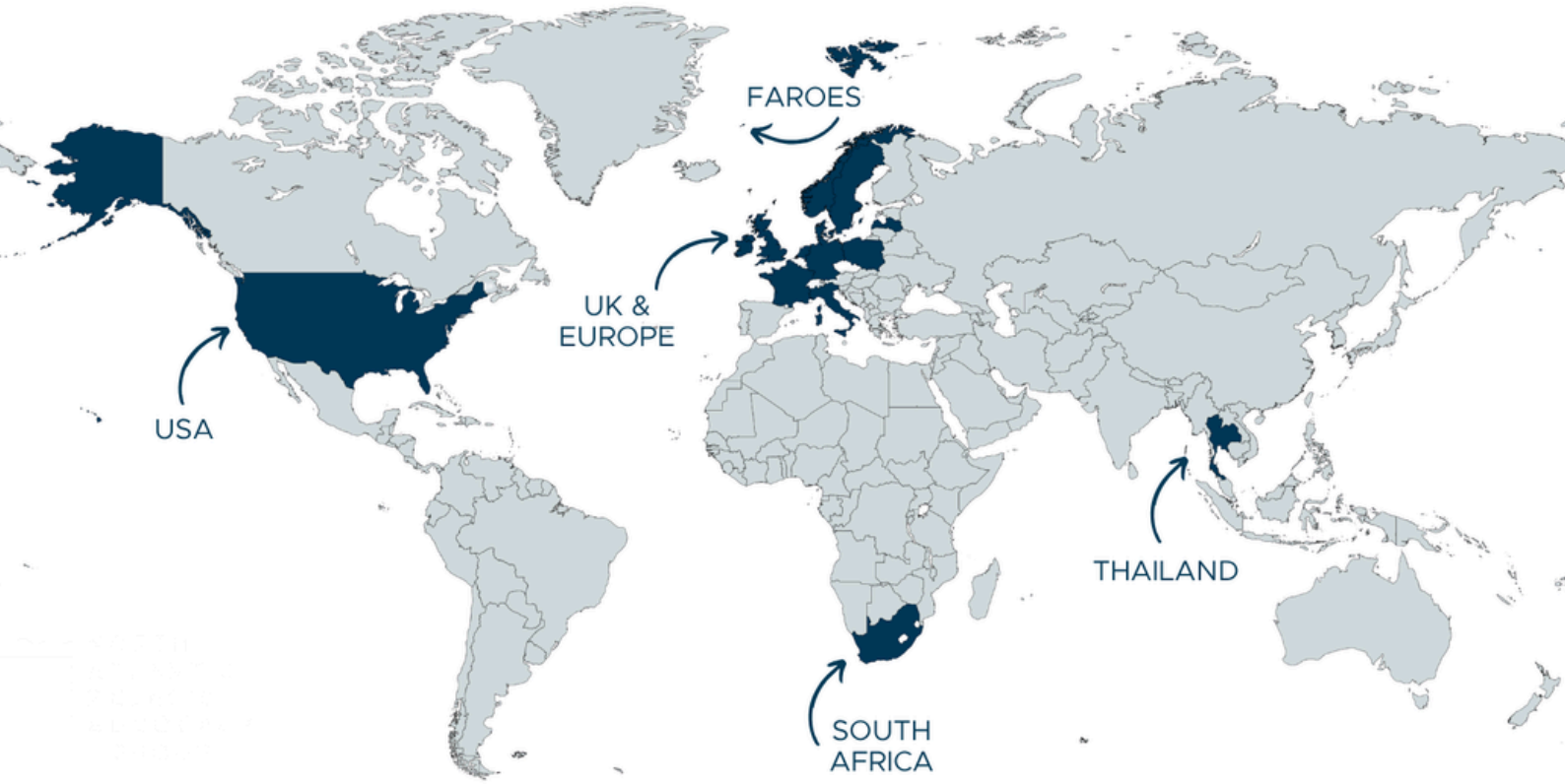
As we enter the final phase of both FIPs, comprehensive, science-based sharing agreements remain within reach but unrealised. The months ahead will be pivotal, not only for the future health of these stocks, but also for the businesses and communities that depend upon them. NAPA is determined to use the remaining time on its FIPs to make the strongest possible case for change and to demonstrate the value of collective market action in driving fisheries reform.

This report highlights the progress achieved over the past year, the influence our collective efforts have generated, and the challenges that still lie ahead. While much remains to be done, our coalition continues to grow, our evidence base continues to strengthen, and our voice carries further than ever. Together, we remain committed to securing a sustainable future for these fisheries for generations to come.



Aoife Martin
NAPA Executive Chair





A global coalition for change

- 57 Partners united behind sustainable pelagic fisheries
- 80% of Norwegian salmon production represented
- Operations spanning 15 countries across 4 continents
- Some of the world's largest seafood companies representing every stage of the seafood supply chain

Governance

In 2025, NAPA became a Private Company Limited by Guarantee, providing a formal governance structure to support its mission of securing the long-term sustainable management of key pelagic fisheries.

NAPA enables members to collaborate pre-competitively on fisheries management challenges, advocate for science-based decision-making, and stay informed on developments affecting responsible sourcing and sustainability outcomes.



Aoife Martin

Executive Chair



Robert Wiltshire

Vice Chair; Head of Seafood Purchasing and Sustainability, LDH (La Doria) Ltd



Dave Robb

Chair, Blue Whiting Sub-Group; Director of Sustainability, Cargill



Leif Kjetil Skjæveland

Deputy Chair, Blue Whiting Sub-Group; Director for Sustainability and Public Affairs, Skretting Norway



Chris Shearlock

Chair, Mackerel Sub-Group; Ambient Sustainability Director, Thai Union



Héctor Martin Fernández

Deputy Chair, Mackerel Sub-Group; Global Sustainable Development Manager, Bolton Foods



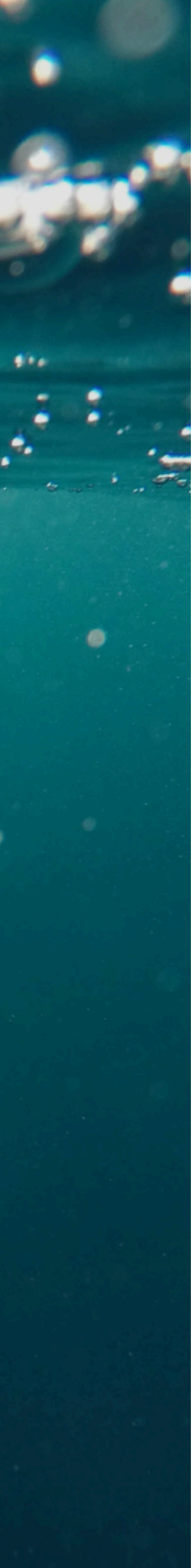
Anne Mette Bæk

Executive Director, EFFOP – Marine Nutrients Europe



Anders Högberg

Research and Strategic Partnerships Manager, Orkla Foods



The Reach of NAPA

Over the past year, we have continued to expand NAPA's influence. We have strengthened our direct engagement with the fishing industry, research community, and Coastal State Ministers and negotiators through in-person and online meetings, letters, and networking opportunities. Included in this, NAPA met with Ministers from the EU and Norway.

Additionally, NAPA has continued to attract Partners from new geographic regions. In November 2025, NAPA began targeted outreach in Japan, an increasingly important market for Atlantic mackerel and therefore a critical stakeholder in the future of these fisheries. Following coverage in major national media outlets, interest from prospective Japanese Partners increased significantly, demonstrating growing global exposure of NAPA's work.

NAPA's influence was further visible on the international stage. Throughout the year, we brought the market perspective to some of the seafood sector's most important events and decision-making forums.

At **Seafood Expo Global**, NAPA highlighted the commercial and sustainability risks associated with continued failures in mackerel management before an audience of seafood industry leaders. At the **North Atlantic Seafood Forum**, NAPA Partners warned of the growing risks facing blue whiting markets should Coastal States fail to reach an agreement.

Beyond public events, NAPA has engaged in Coastal State decision-making processes. We participated in **Coastal States negotiations** and **NEAFC meetings**, where we were invited to address plenary sessions, present the market perspective, and

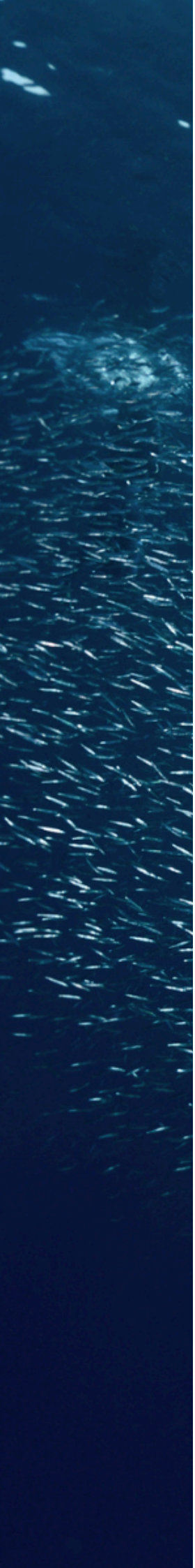
introduce NAPA's new catch-sharing proposal designed to support progress towards a comprehensive agreement.

By combining the influence of global seafood businesses with sustained engagement at the highest levels of fisheries governance, NAPA continues to ensure that the voice of the marketplace is heard where it matters most.





Top: North Atlantic Seafood 2026, from left to right: Aoife Martin, Helge Ådne Lien, Leif Kjetil Skjæveland, Anne Mette Bæk, Chris Shearlock, Lars Galtung.
Bottom: NAPA Partners meeting with the European Commission, from left to right: Jørgen Skeide, Kenneth Storbank, Anders Högberg. Leif Kjetil Skjæveland, Aoife Martin, Héctor Martin Fernández



Evidence-Based Solutions: Developing a Model Sharing Arrangement

As pressure on pelagic stocks has intensified, and with Coastal States unable to reach comprehensive sharing agreements, NAPA has recognised the need to move beyond highlighting the problem and contribute constructively to the search for solutions.

In 2025, NAPA developed a **model sharing arrangement**: an independent, evidence-based proposal designed to support progress towards sustainable management of North East Atlantic mackerel, blue whiting and Atlanto-Scandian herring. The proposal sets out suggested allocations of scientifically advised catch among Coastal States, providing a practical framework for keeping total fishing pressure within agreed scientific limits.

The development of the model sharing arrangement marked an important evolution in NAPA's work. As a politically neutral coalition representing the global seafood marketplace, NAPA is uniquely positioned to bring together commercial realities, scientific advice and fisheries management objectives.

By combining detailed analysis with market insight, NAPA's proposal demonstrates that viable pathways towards agreement do exist.

The significance of this work was recognised at the highest levels of fisheries governance. NAPA was invited to present the model sharing arrangement to the North East Atlantic Fisheries Commission (NEAFC) and to the individual negotiating teams of six Coastal State parties. These valuable opportunities paved the way for the marketplace to contribute directly to discussions traditionally dominated by governments and fisheries managers.

While no agreement has yet been reached, the model sharing arrangement remains the only non-partisan approach presented to

date that offers a complete solution for achieving equitable catch shares. There is a key opportunity for more work to be done to further develop this sharing arrangement in collaboration with Coastal States parties. Nevertheless, it has reinforced NAPA's role not only as an advocate for change, but as a credible source of evidence and analysis capable of supporting progress.

In addition, NAPA led a study exploring the economic consequences of blue whiting being removed from the supply chain, drawing on information provided by NAPA Partners. It was found that the economic loss would outweigh the gains of any single Coastal State if the impasse in blue whiting negotiations continues, demonstrating a clear, financial argument for breaking the political deadlock.

The challenges facing these fisheries cannot be undone overnight. However, the opportunity remains to secure a sustainable future for these stocks. NAPA will continue to use the model sharing arrangement, alongside sustained engagement with decision-makers, to press for agreements that align with scientific advice and provide long-term certainty for the businesses, workers and communities that depend upon these fisheries.

Table 1: Preliminary assessment of the economic impact of NAPA's Model Sharing Arrangement by Coastal State compared to the Status Quo (2020-2024), with a focus on the loss/gain in total landing values only, based on the ICES advice for 2025 and the 2022-2024 mean first-sale price (€)

COASTAL STATE	NORWAY	FAROES	ICELAND	GREEN-LAND	UK	EU	RUSSIAN FED.
CHANGE IN FIRST SALE VALUE (€)	-10.5 M	-16.9 M	-10.8 M	+5.6 M	+0.4 M	+27.9 M	+1.1 M
% CHANGE IN VALUE	-2.4%	-7.9 %	-5.1%	+19.0%	+0.2%	+11.2%	+0.7%

International Conveners and Collaborators

Addressing the challenges facing North East Atlantic pelagic fisheries requires more than individual action. Throughout 2025, NAPA worked alongside leading international sustainability organisations to strengthen calls for reform and demonstrate the broad coalition seeking improved fisheries management.

By bringing together market actors, certification bodies and non-governmental organisations, NAPA helped ensure that concerns about the future of these fisheries were heard consistently and collectively across the seafood sector.

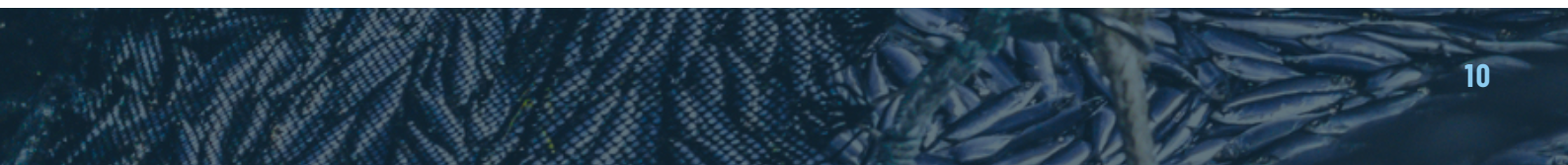
Amplifying the Call for Action

In partnership with the Marine Stewardship Council (MSC), NAPA issued a joint letter to the European Commission and the UK Government ahead of the annual Coastal States and North East Atlantic Fisheries Commission (NEAFC) negotiations. The letter highlighted the urgent need for comprehensive quota-sharing agreements, particularly for North East Atlantic mackerel, and outlined the economic and environmental risks associated with continued management failure.

The collaboration demonstrated growing alignment between the marketplace and certification community on the need for science-based fisheries management and long-term solutions.

Championing Sustainable Feed Fisheries

NAPA also partnered with the Aquaculture Stewardship Council (ASC) to raise awareness of the importance of sustainable feed fisheries, particularly blue whiting. Responding to findings from Sustainable Fisheries Partnership's Reduction Fisheries Report and the United Nations Food and Agriculture Organization's State of World Fisheries and Aquaculture (SOFIA) report, NAPA and ASC published a joint opinion piece highlighting the critical role that responsibly managed forage fisheries play in supporting sustainable aquaculture.

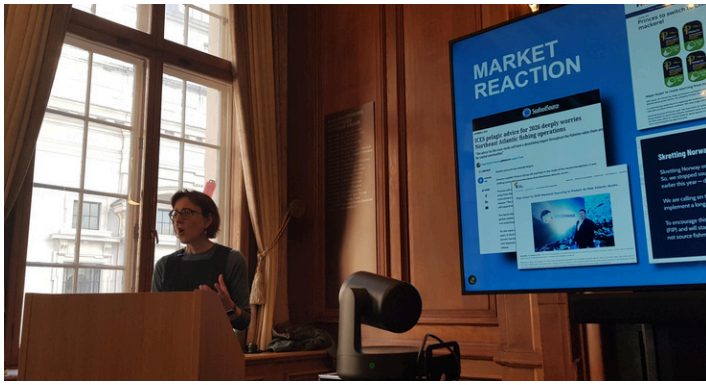


Bringing Stakeholders Together

NAPA's role as a trusted convener was further demonstrated at its Annual Meeting in December 2025. The event brought together supply chain Partners, Coastal State negotiators, catching sector representatives, fisheries scientists and certification bodies to reflect on a challenging year for North East Atlantic pelagic fisheries and discuss priorities for the future.

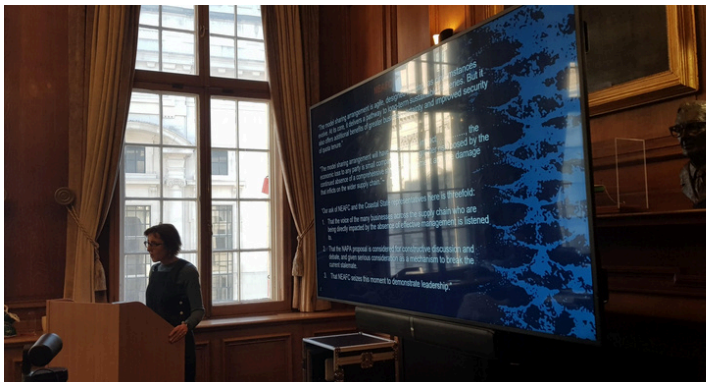
While frustration remained at the lack of progress towards comprehensive agreements, the meeting provided a valuable forum for open dialogue between groups that do not always have opportunities to engage directly. Importantly, **the response from both industry and government representatives was that NAPA's voice was being heard.** Our message is reaching decision-makers and helping to shape discussions around the future management of these fisheries.

By building partnerships across the seafood sector and creating space for constructive dialogue, NAPA continued to strengthen the collective voice calling for sustainable, science-based fisheries management.









Cut-Through Communications

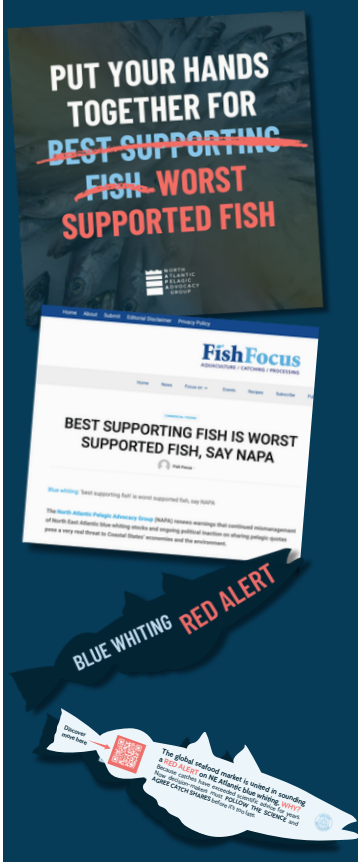
Throughout 2025 and 2026, NAPA continued to strengthen its position as a leading voice on North East Atlantic pelagic fisheries through targeted communications campaigns designed to translate complex fisheries management issues into compelling stories for industry, policymakers and the wider public.

Working with communications partner Mindfully Wired, NAPA developed three species-focused campaigns—*Best Supporting Fish, Mackerel Maths* and *Herring's Got History*—each designed to shine a spotlight on the challenges facing these fisheries and build support for improved management.

Bringing Blue Whiting into the Limelight

Launched at the North Atlantic Seafood Forum, *Best Supporting Fish* positioned blue whiting as the unsung hero of the North East Atlantic. The campaign highlighted the species' critical role in aquafeed production and demonstrated how continued mismanagement creates risks for businesses throughout the global seafood supply chain.

The campaign generated thousands of impressions, secured coverage across leading seafood trade publications, including *Undercurrent News* and *Fish Focus*, and resulted in high-profile interviews with the NAPA team. Most importantly, it helped elevate blue whiting from a largely overlooked species to a recognised topic of discussion within the seafood sector.



Making Mackerel Management Understandable

As concerns over the future of North East Atlantic mackerel intensified, NAPA launched *Mackerel Maths*, a campaign designed to communicate the challenges of quota allocation in a simple and accessible way.

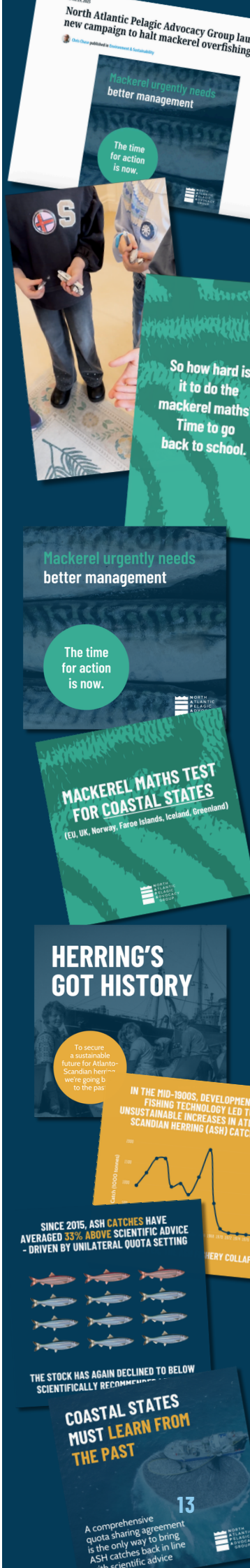
The campaign's centrepiece challenged schoolchildren to decide how catches should be divided among themselves, highlighting the contrast between a child's innate understanding of fairness and sharing and the complex political realities that have contributed to the current impasse. The accompanying film attracted nearly 1,500 views, was featured across eight media outlets, and generated the highest levels of engagement ever recorded on NAPA's LinkedIn channel.

By simplifying a highly technical issue, the campaign helped showcase the failures in the current management approach and the simple power of collaboration and compromise to find a solution.

Learning From History

To complete the trilogy of species campaigns, *Herring's Got History* used archive photography and historical case studies from Iceland, Norway and the Faroe Islands. Spotlighting the stark economic, employment and population impacts of the Atlanto-Scandian herring crash of the 1970s, the case studies reminded audiences of the very real consequences of failing to manage fisheries sustainably.

Although smaller in scale, the campaign delivered strong results, increasing search appearances by 85% and social media impressions by 70%. The campaign reinforced a central message underpinning all of NAPA's work: history has shown what can happen when management fails, and there is still time to avoid repeating those mistakes.



Building Influence Through Communication

Together, these campaigns significantly expanded the reach of NAPA's message, helping to bring fisheries management issues to new audiences while strengthening engagement with existing stakeholders. Through consistent, evidence-based communications, NAPA has continued to establish itself as a trusted source of information for media, seafood businesses, policymakers and sustainability organisations alike.

As the Fisheries Improvement Projects enter their final phase, effective communication remains a critical tool in ensuring that the urgency of these challenges, and the need for action, remains firmly in the spotlight.



Communications Impact 2025-26

- 3 species-focused campaigns launched
- 1,500+ views of *Mackerel Maths* film
- Coverage across 8 media outlets
- Highest-ever LinkedIn engagement
- 85% increase in search appearances
- 70% increase in social media impressions
- Interviews secured in leading seafood publications



Transparency at Heart

Transparency has been central to NAPA's approach from the outset. Regular Fisheries Improvement Project (FIP) reporting, independently verified, ensures that progress, challenges and priorities are openly communicated to members, stakeholders and the wider seafood sector. This commitment to openness underpins NAPA's credibility as a trusted, evidence-based voice for the marketplace.

In April 2026, this approach received external recognition when NAPA was ranked the leading seafood industry association in a global study of biodiversity-related lobbying by the think tank InfluenceMap. The assessment highlighted NAPA's constructive engagement on fisheries management and its alignment of commercial advocacy with environmental outcomes.

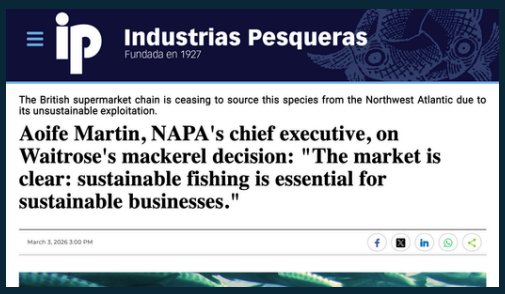
This recognition reflects a core principle that continues to guide NAPA's work: long-term business resilience is inseparable from healthy marine ecosystems.

The impact of this approach is also visible in the market. Following key developments in the North East Atlantic mackerel fishery, several major retailers reviewed their sourcing positions, including the decision to 'cease sourcing' by a leading UK retailer in February 2026. This followed similar actions taken by two leading European canned fish brands, and a number of Dutch retailers in October 2025. The aquafeed sector has also made strong public commitments to halt the sourcing of blue whiting if Coastal States fail to reach agreement within the timeline of the FIP. These responses demonstrate how scientific developments and management uncertainty are increasingly translating into commercial reality across the supply chain.

The economic impact of sourcing decisions is becoming increasingly significant. Businesses are being compelled to explore alternative species and supply chains, often resulting in substantial

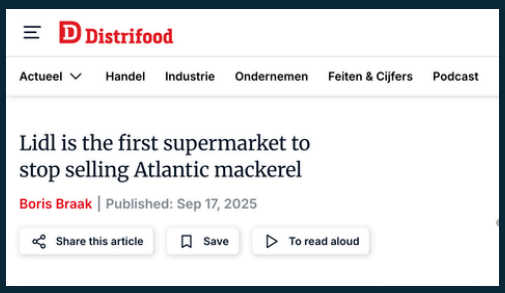
financial and logistical costs. Entering new seafood markets also presents considerable challenges in ensuring supply security and reliability while meeting customer demand. The scale and complexity of these market impacts should not be underestimated.

Together, these developments reinforce the importance of transparent, science-led communication. By openly sharing data, progress and analysis, NAPA continues to strengthen trust across the supply chain and ensure that environmental performance and market decision-making remain closely aligned.













About the North Atlantic Pelagic Advocacy Group

The North Atlantic Pelagic Advocacy Group (NAPA) is a market-led coalition working to improve the management of key North East Atlantic pelagic fisheries: mackerel, Atlanto-Scandian herring, and blue whiting.

NAPA was established in response to long-standing disputes between Coastal States over quota allocation in the North East Atlantic, which have repeatedly resulted in catches exceeding scientific advice. The absence of comprehensive sharing arrangements has contributed to declining stock health, most notably in mackerel, and has undermined the ability of these fisheries to achieve and maintain credible third-party certification.

This lack of certification has direct consequences for global seafood markets. Many products dependent on these fisheries, including canned mackerel and farmed salmon, rely on certified sustainable sourcing to meet retailer requirements. Without it, supply chains face increasing risk, including restricted market access, rising costs, and potential product withdrawal from retail shelves.

NAPA exists to address these challenges by bringing together leading seafood businesses to advocate for long-term, science-based fisheries management. It provides a platform for coordinated, pre-competitive action across the supply chain, ensuring that market expectations are clearly communicated to decision-makers.

The group delivers this work through two Fisheries Improvement Projects (FIPs), one covering mackerel and herring, and a separate MarinTrust FIP for blue whiting. Both FIPs are scheduled to conclude in October 2026. These initiatives are designed to build momentum for reform, strengthen accountability, and support the development of comprehensive, science-aligned management agreements.

Together, they aim to ensure that these fisheries are managed in a way that safeguards long-term ecological sustainability and secures stable, responsible supply for global markets.



NAPA Members

As of August 2026

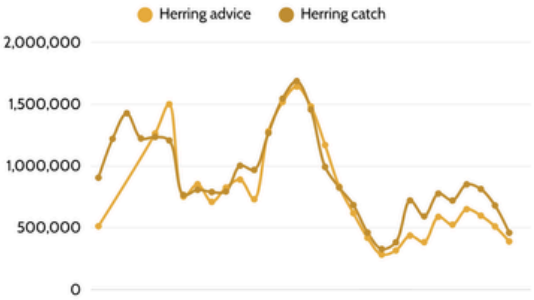


North East Atlantic mackerel



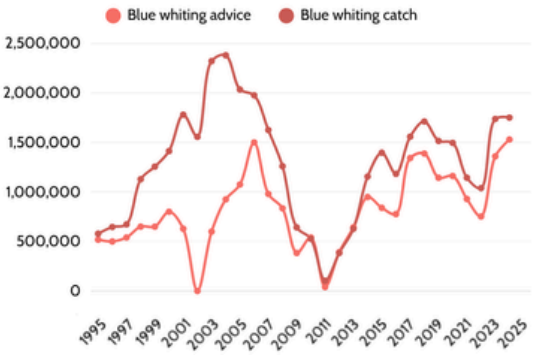
Catch advice reduced by 70% for 2026

Atlanto-Scandian herring



Catch advice reduced by 41% for 2026

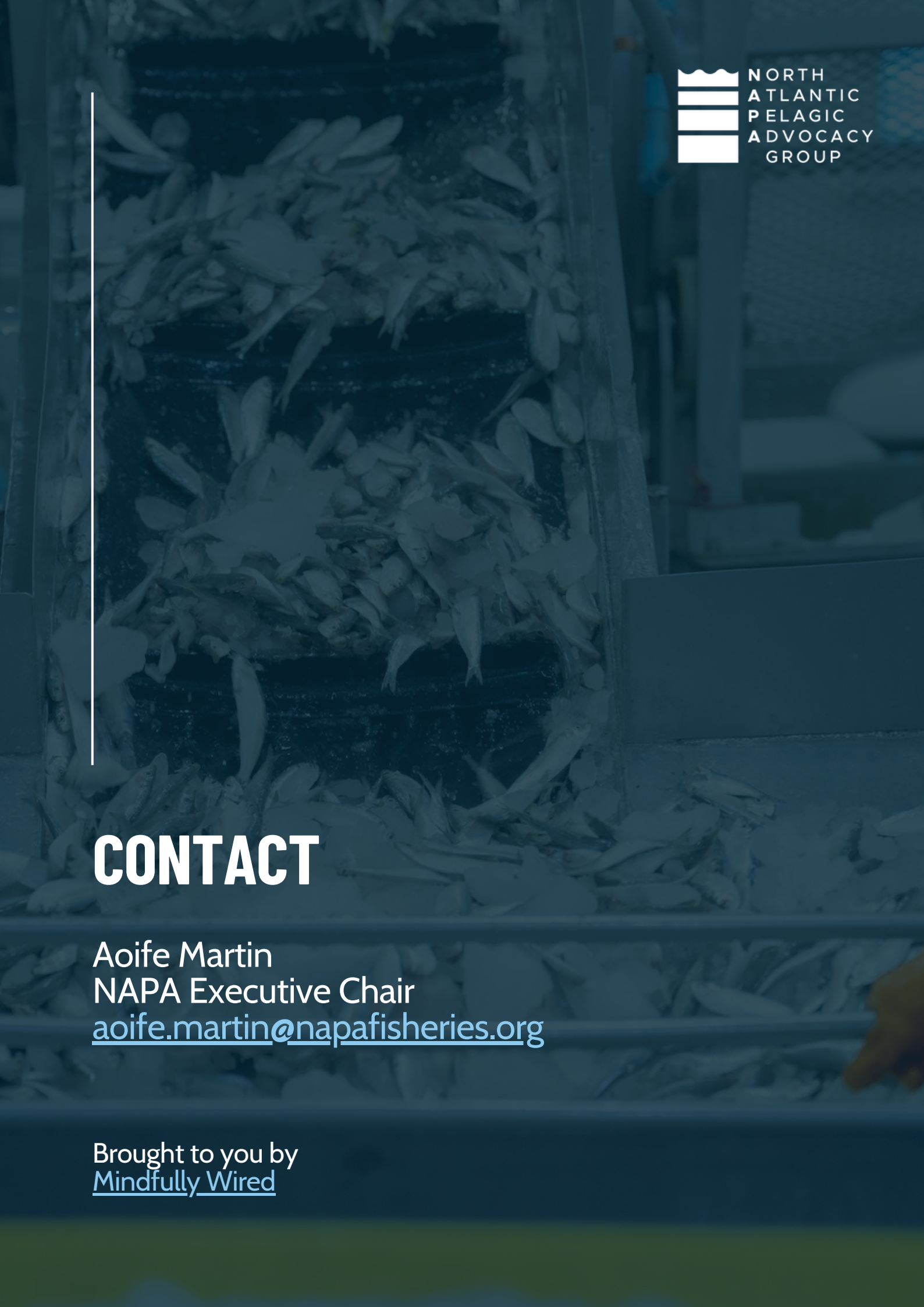
North East Atlantic Blue whiting



Catch advice increased by 33% for 2026

North East Atlantic pelagic fish stock status

As of 30 September 2025



NORTH ATLANTIC PELAGIC ADVOCACY GROUP

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