Via Aqua
Seafood & Prospective

Insights into the European eel market chain

June 2014

FranceAgriMer
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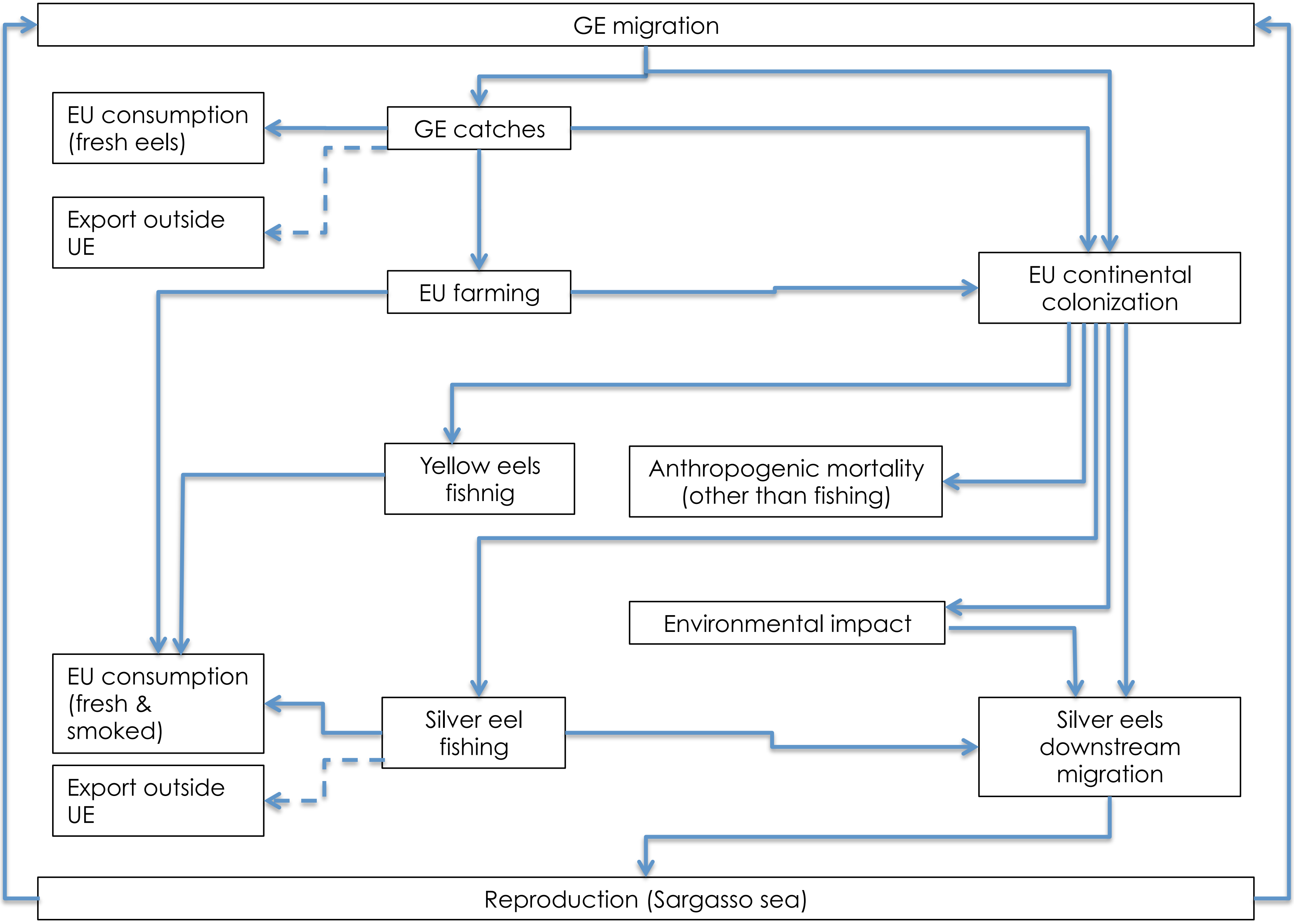
DES PRODUITS DE L'AGRICULTURE ET DE LA MER

The European eel market chain

The European eel (market) chain



The European eel destiny

Color codes for easier understanding of the following slides

Glass eels
Elvers
Eels

Supply: fishing and import

First sale to fish merchant & traders

Restocking

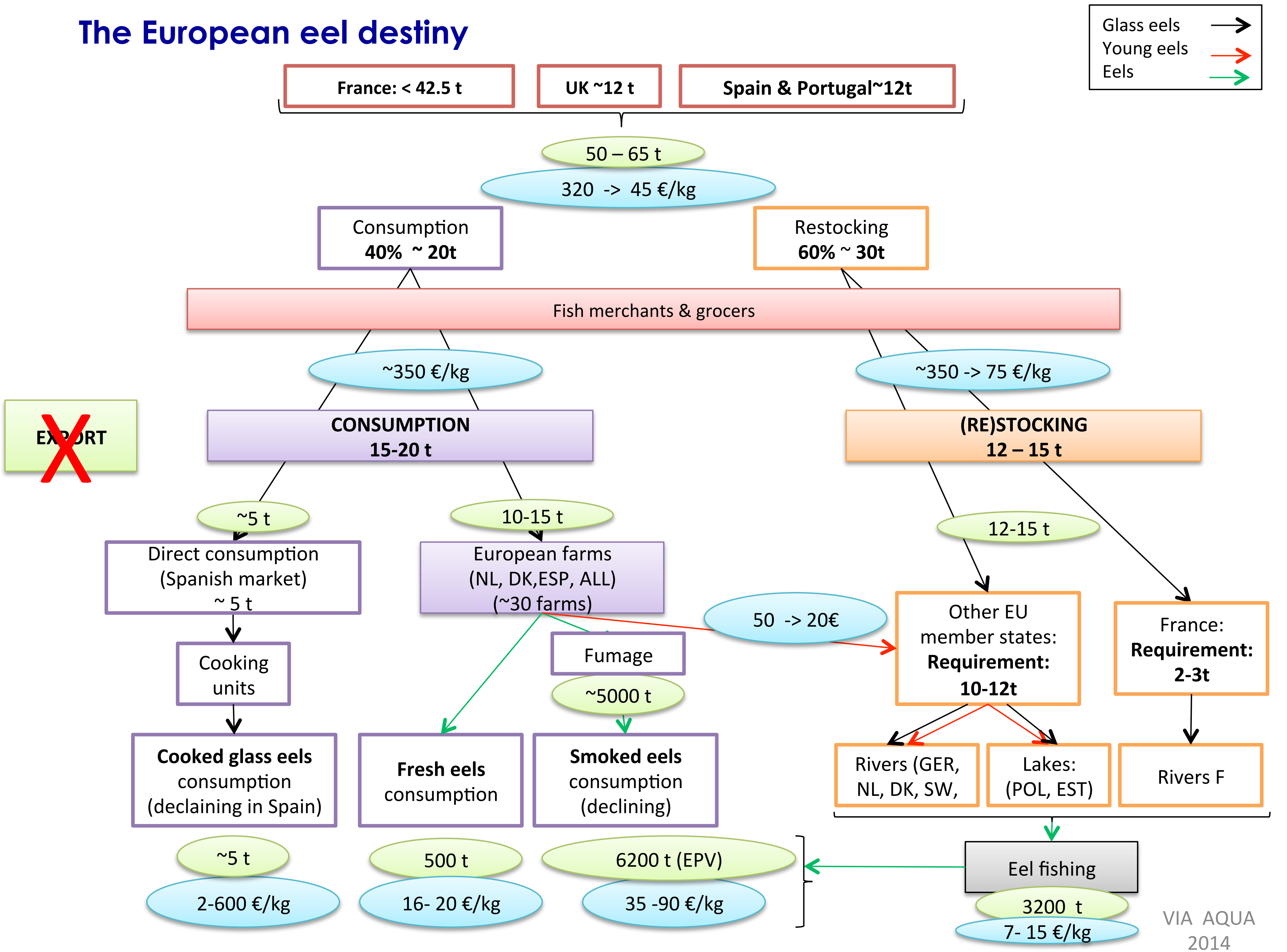
Farming and consumption

Yellow and silver eels fishing

Volumes (kg or t) 2012- 2013 data (mostly)

Prices (€) 2014 data (mostly)

Source of data: PGA's, ICES reports, interviews and calculation whenever necessary.


The European eel destiny
Glass eels
Young eels
Eels
France: < 42.5 t
UK ~12 t
Spain & Portugal~12t
50 – 65 t
320 -> 45 €/kg
Consumption
40% ~ 20t
Restocking
60% ~ 30t
Fish merchants & grocers
~350 €/kg
~350 -> 75 €/kg
EXPORT
CONSUMPTION
15-20 t
(RE)STOCKING
12 – 15 t
~5 t
10-15 t
12-15 t
Direct consumption
(Spanish market)
~ 5 t
European farms
(NL, DK,ESP, ALL)
(~30 farms)
50 -> 20€
Other EU
member states:
Requirement:
10-12t
France:
Requirement:
2-3t
Cooking
units
Fumage
~5000 t
Cooked glass eels
consumption
(declaining in Spain)
Fresh eels
consumption
Smoked eels
consumption
(declining)
Rivers (GER,
NL, DK, SW,
Lakes:
(POL, EST)
Rivers F
Eel fishing
~5 t
2-600 €/kg
500 t
16- 20 €/kg
6200 t (EPV)
35 -90 €/kg
3200 t
7- 15 €/kg
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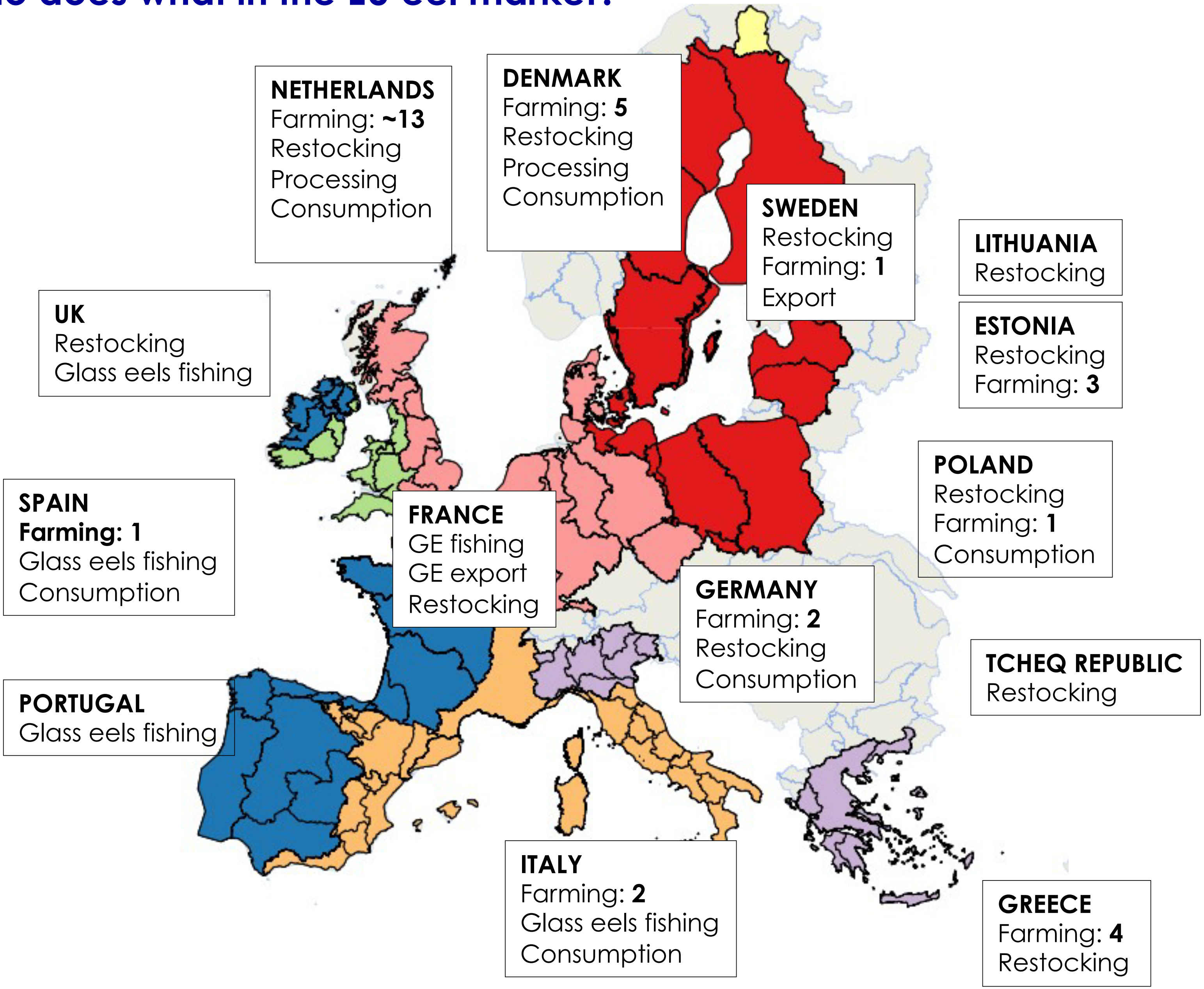
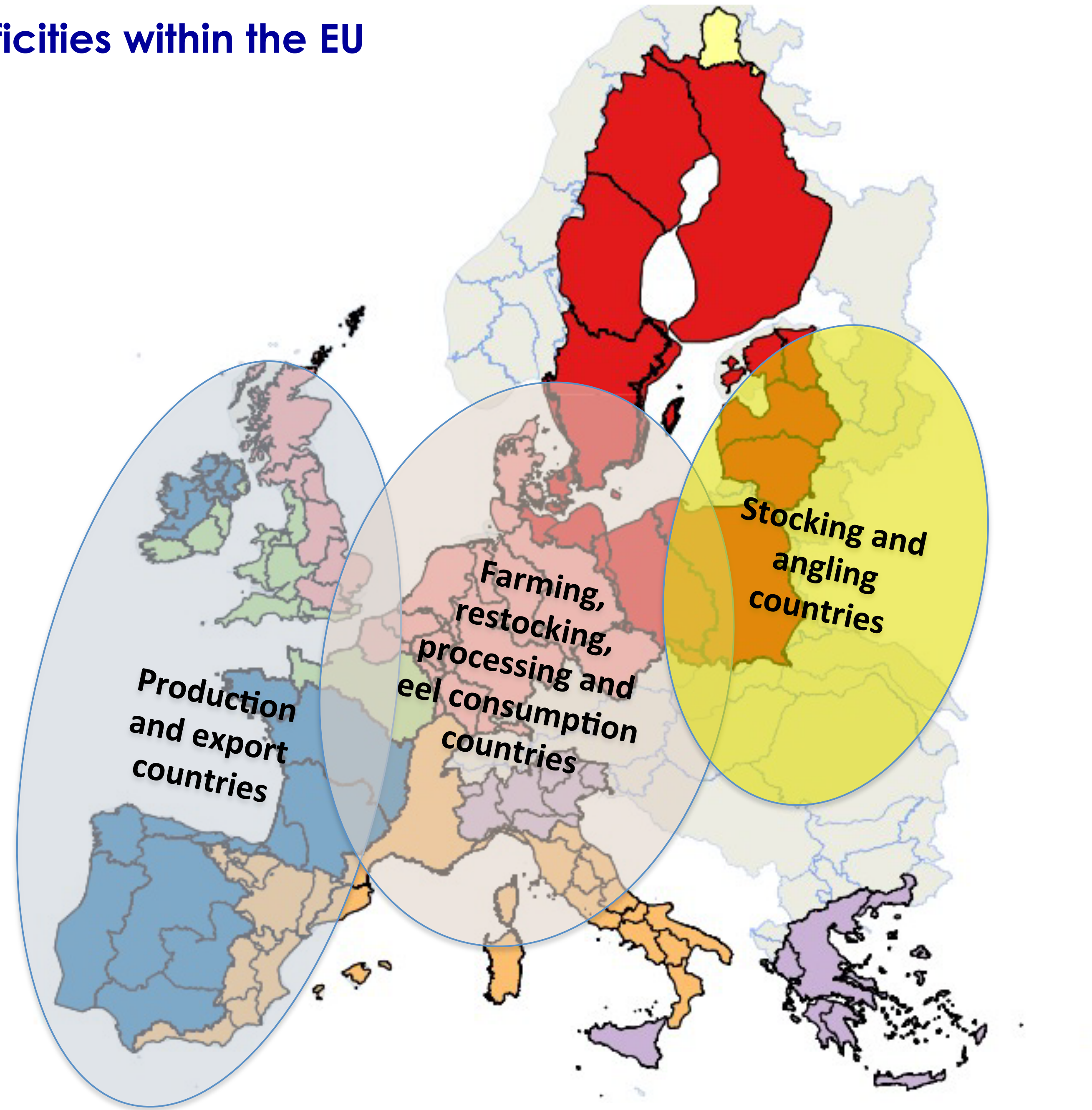
2014

Who does what in the EU eel market?

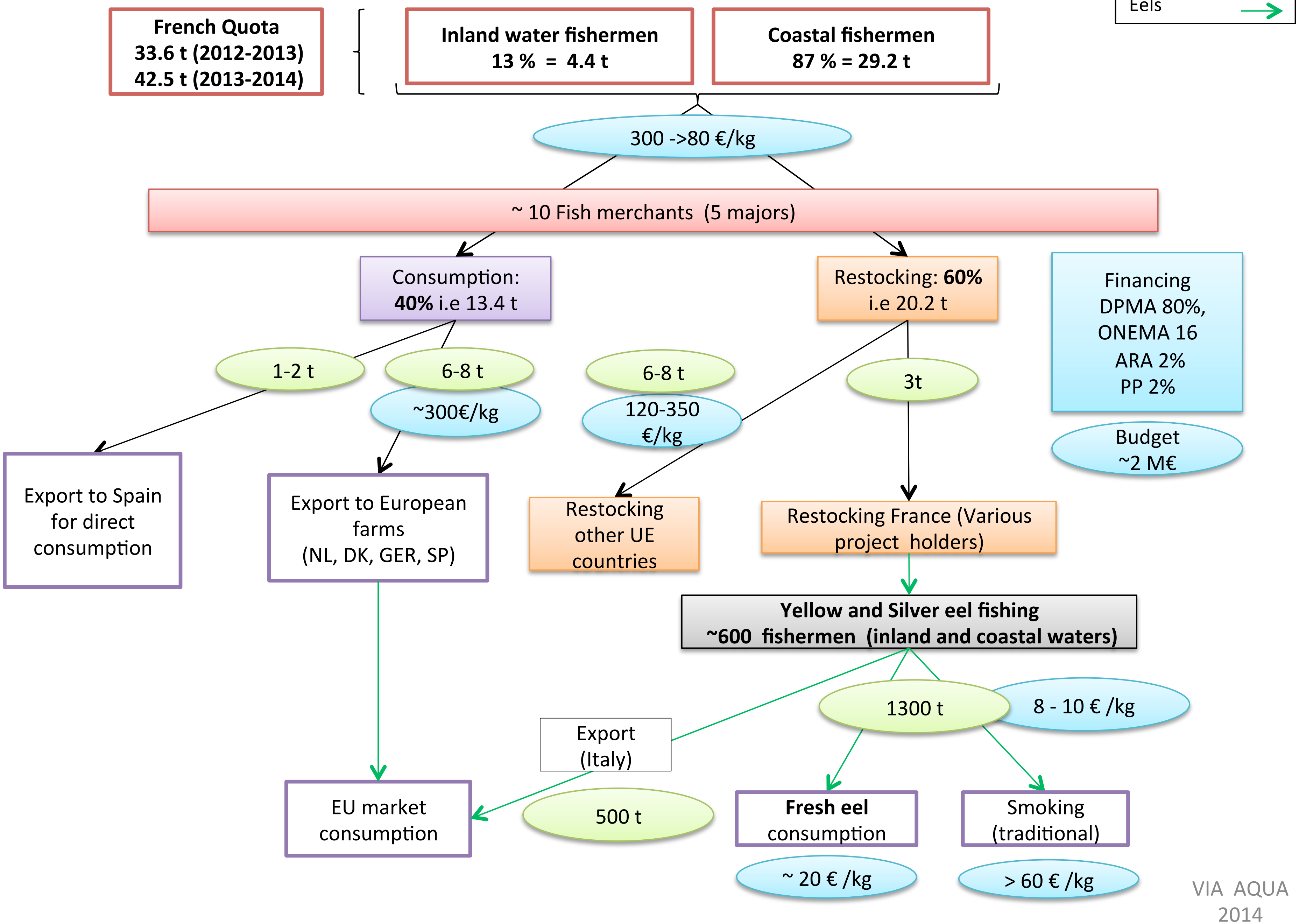


Some specificities within the EU

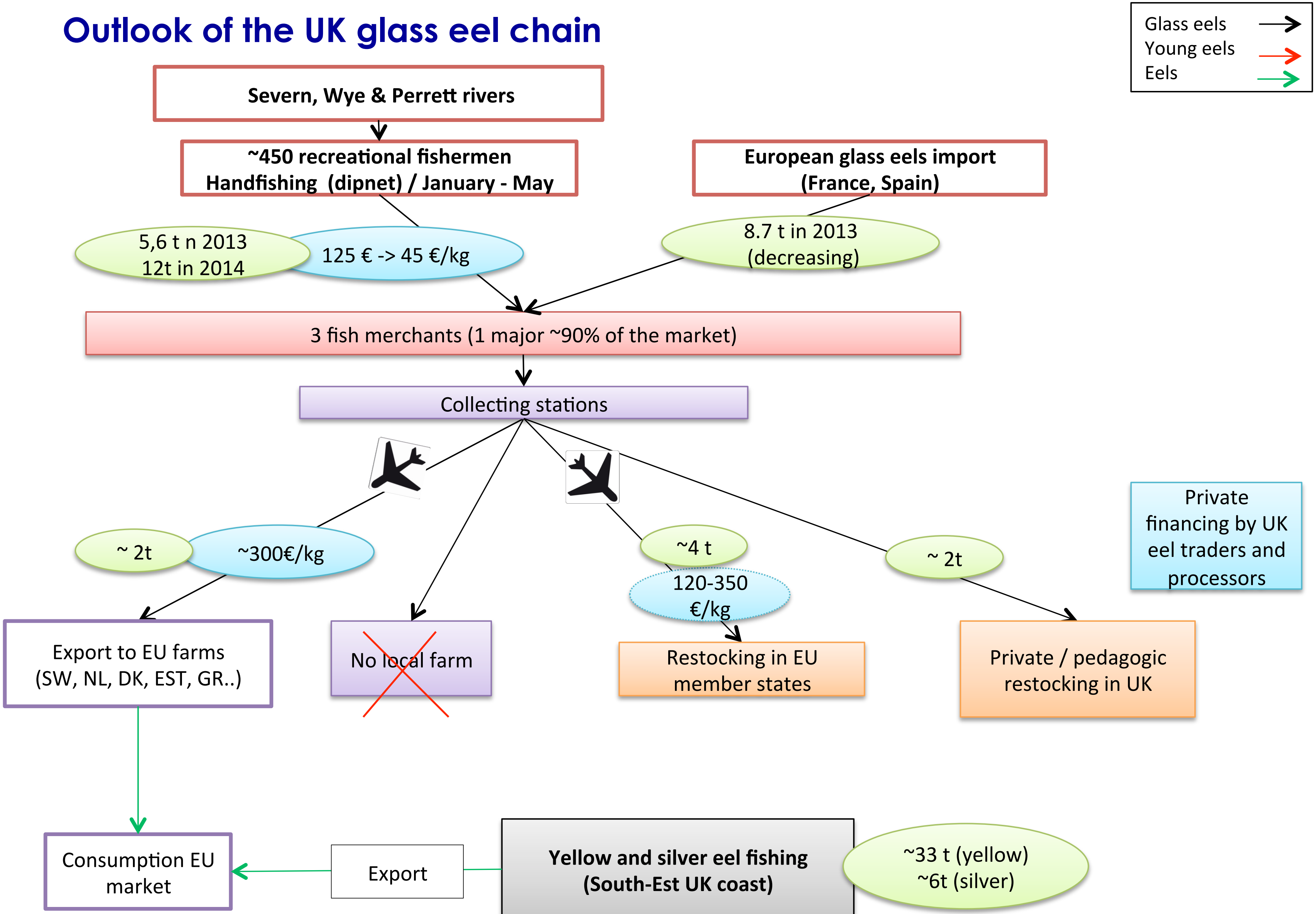


The European eel sector at country scale

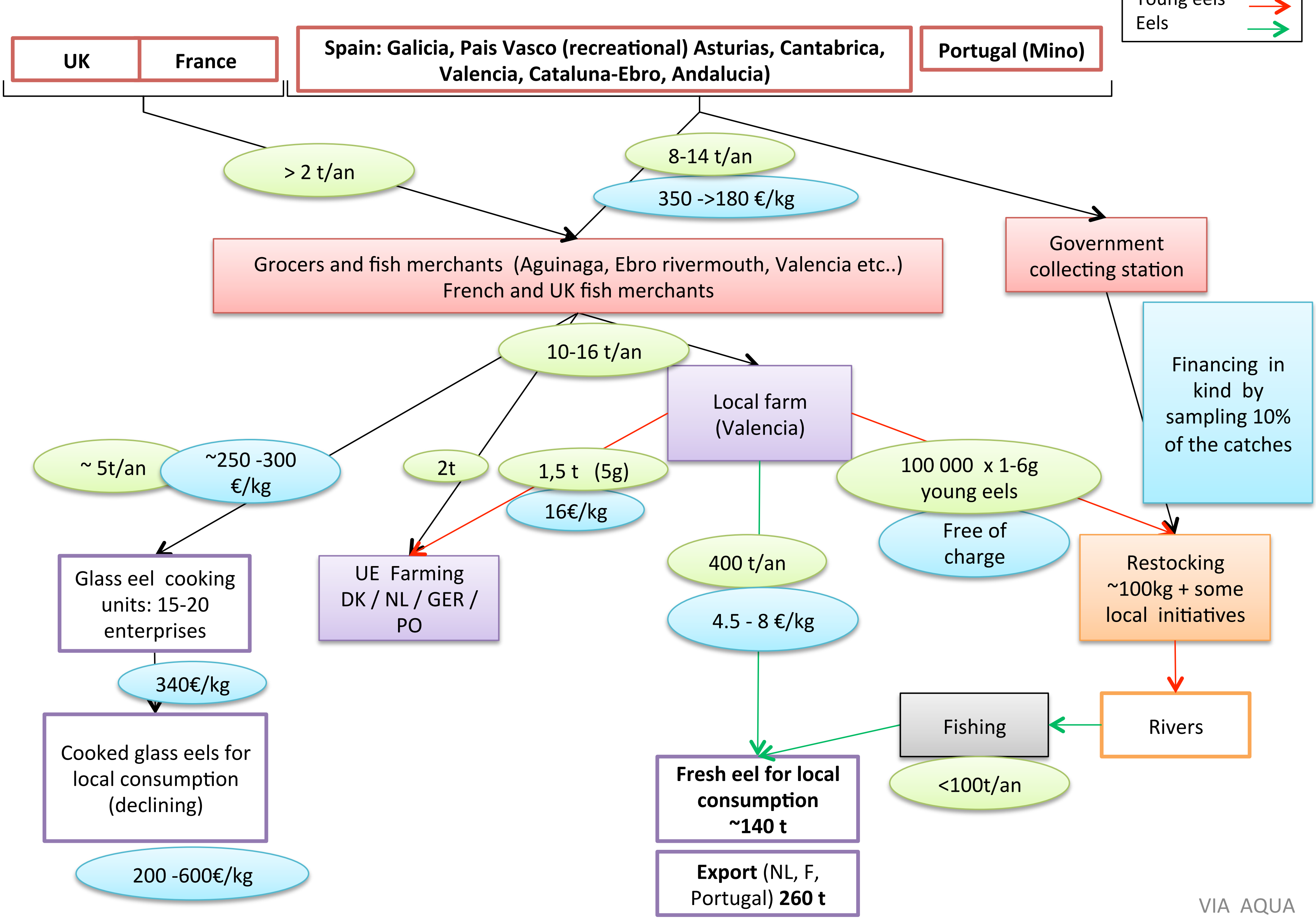
Outlook of the French glass eel chain



Outlook of the UK glass eel chain



Outlook of the Spanish glass eel chain



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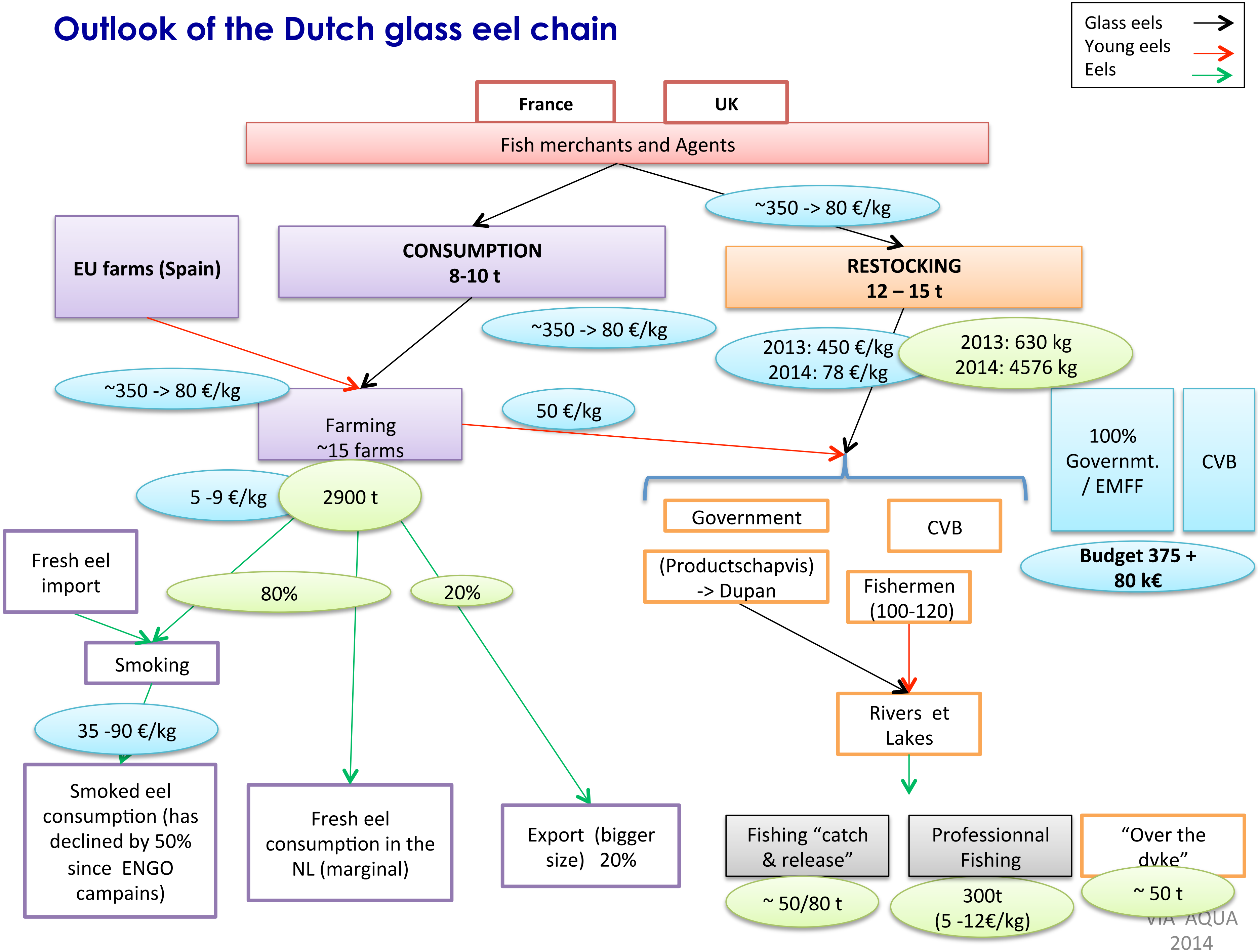
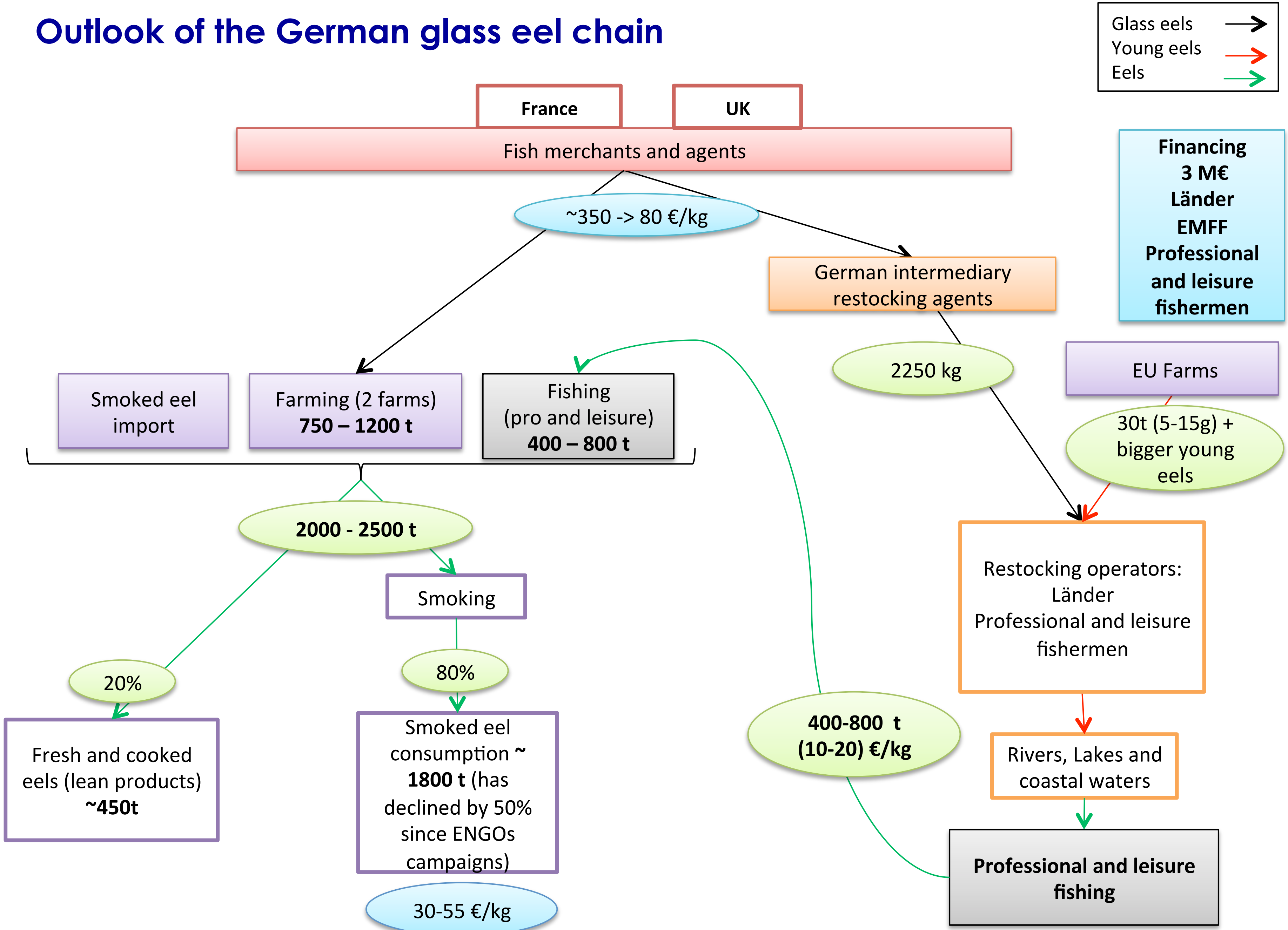
Outlook of the Dutch glass eel chain



Outlook of the German glass eel chain



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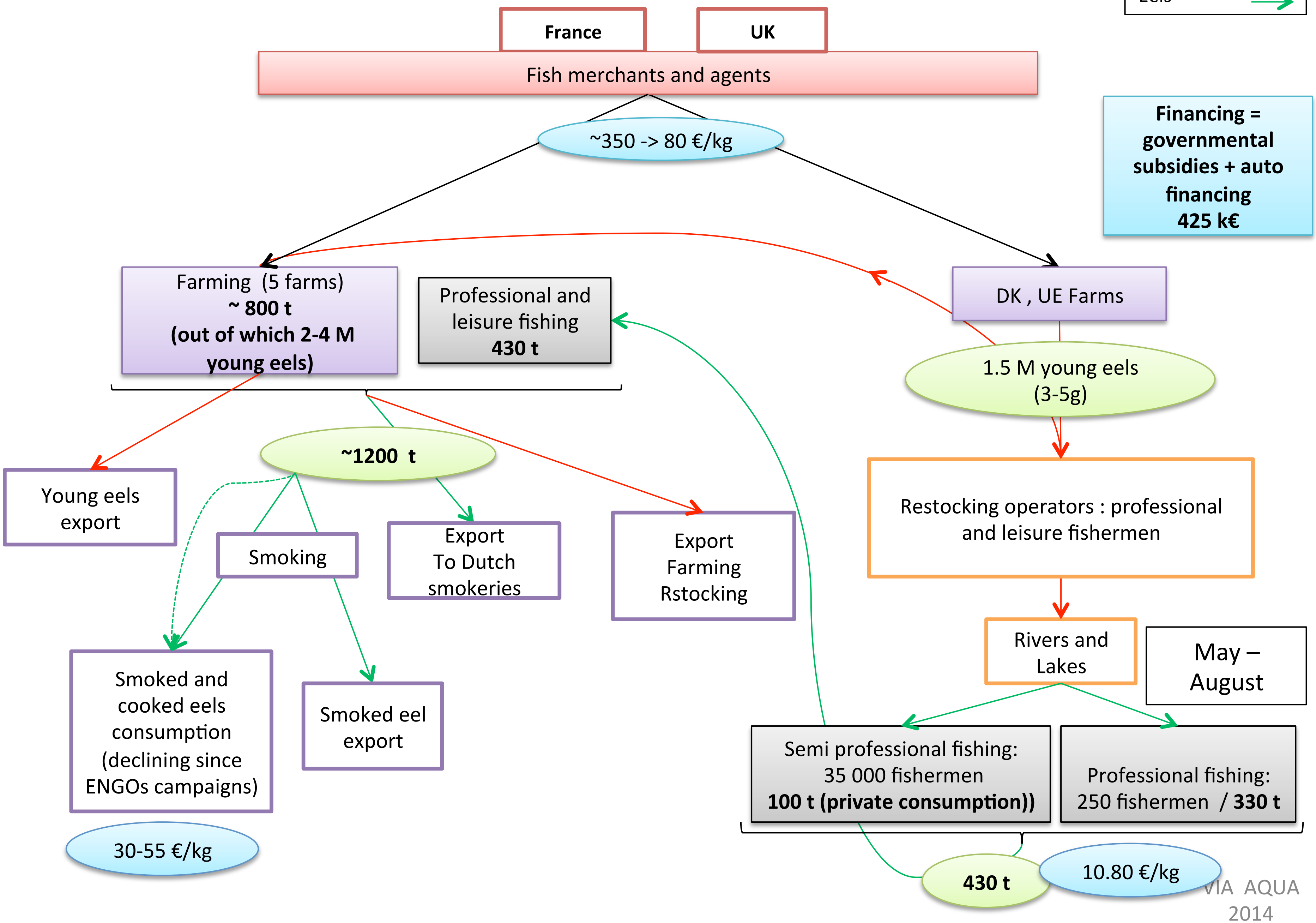
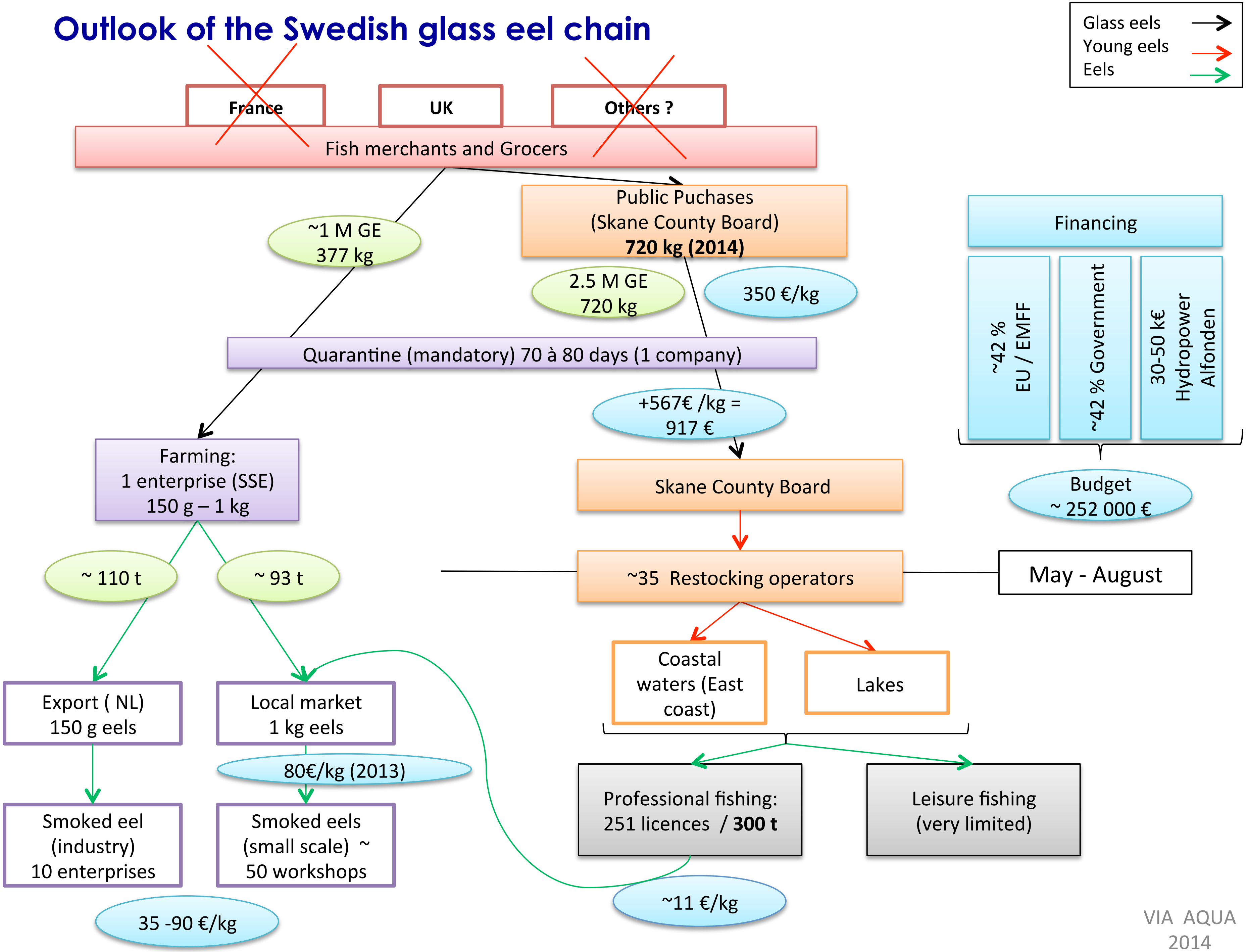
Outlook of the Danish glass eel chain



Outlook of the Swedish glass eel chain



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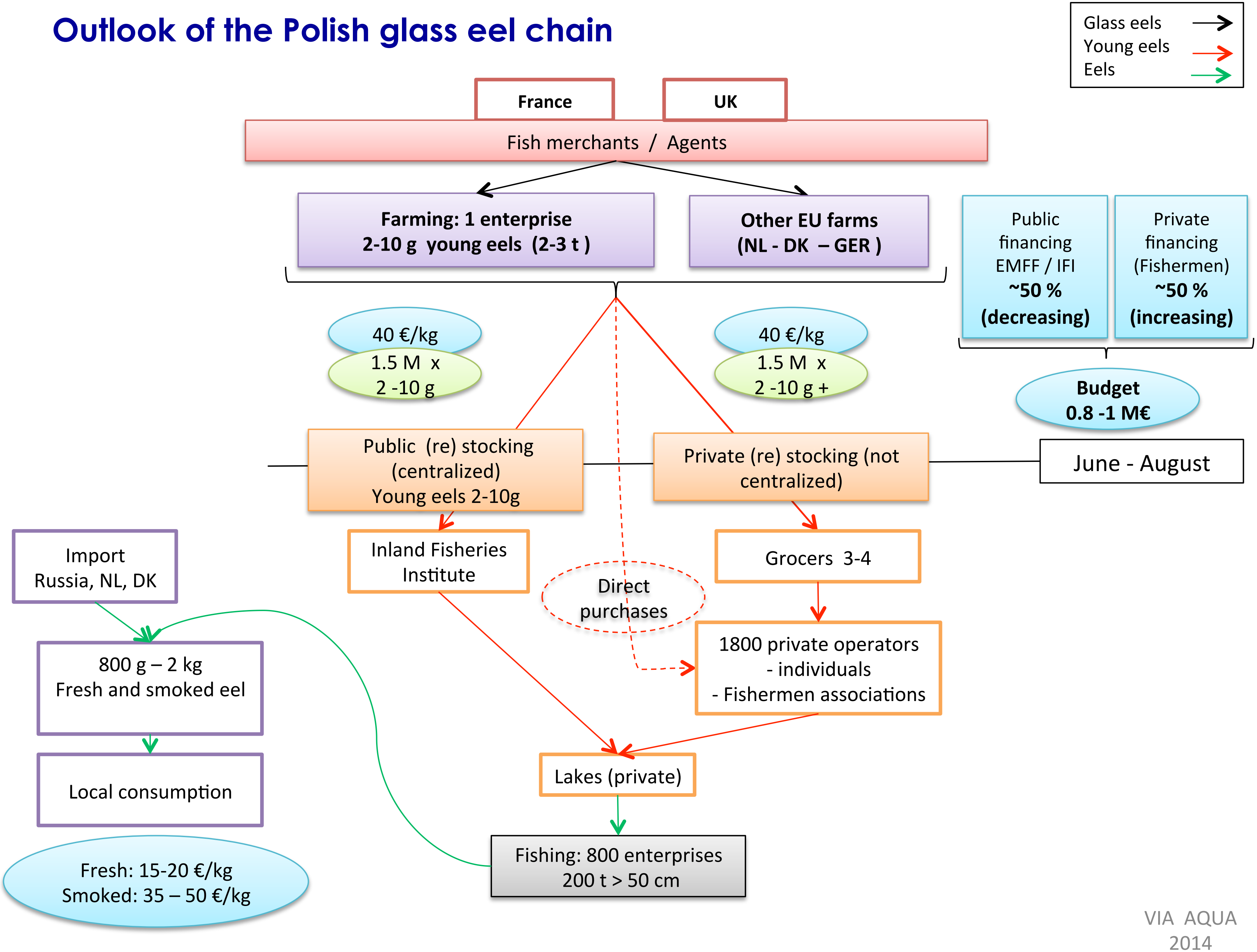
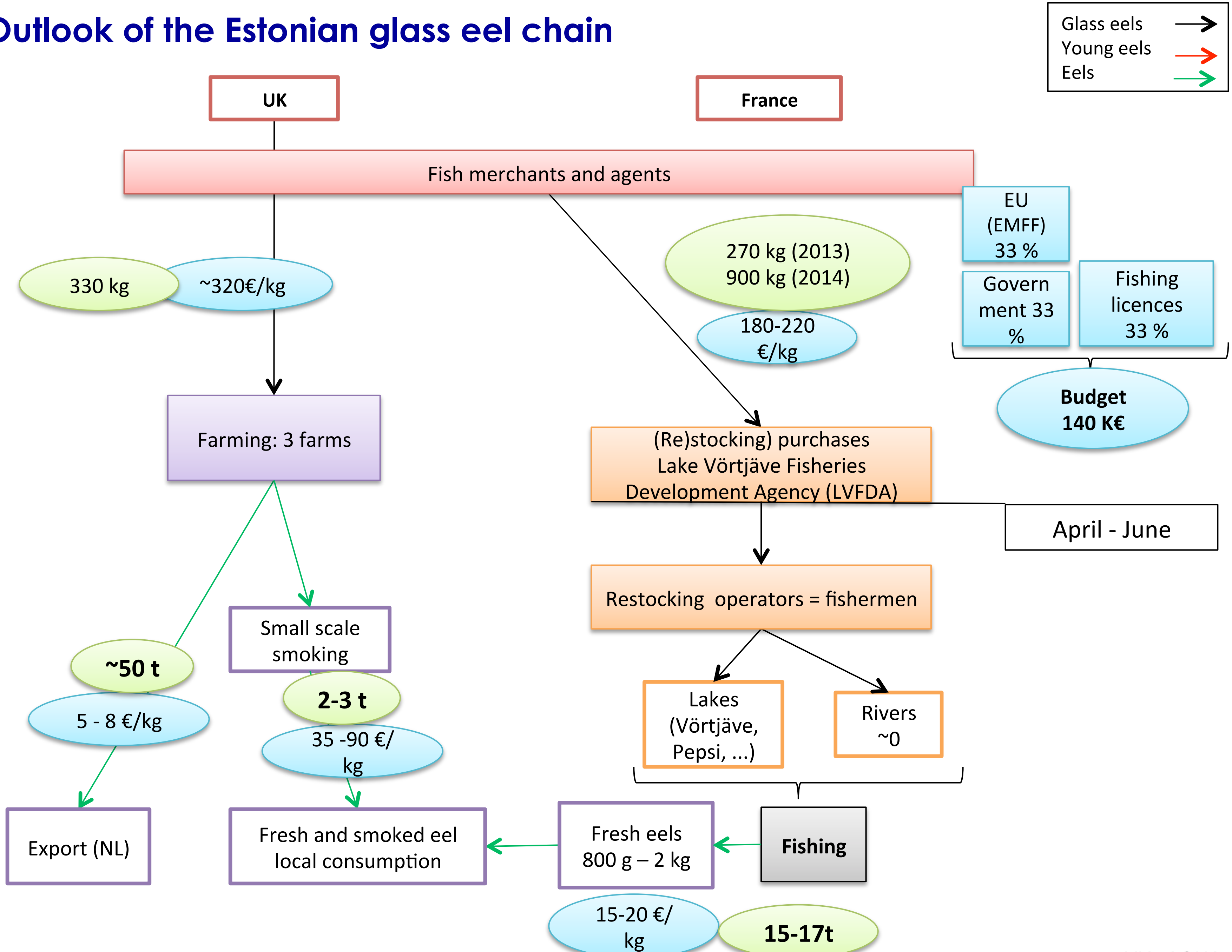
Outlook of the Polish glass eel chain



Outlook of the Estonian glass eel chain



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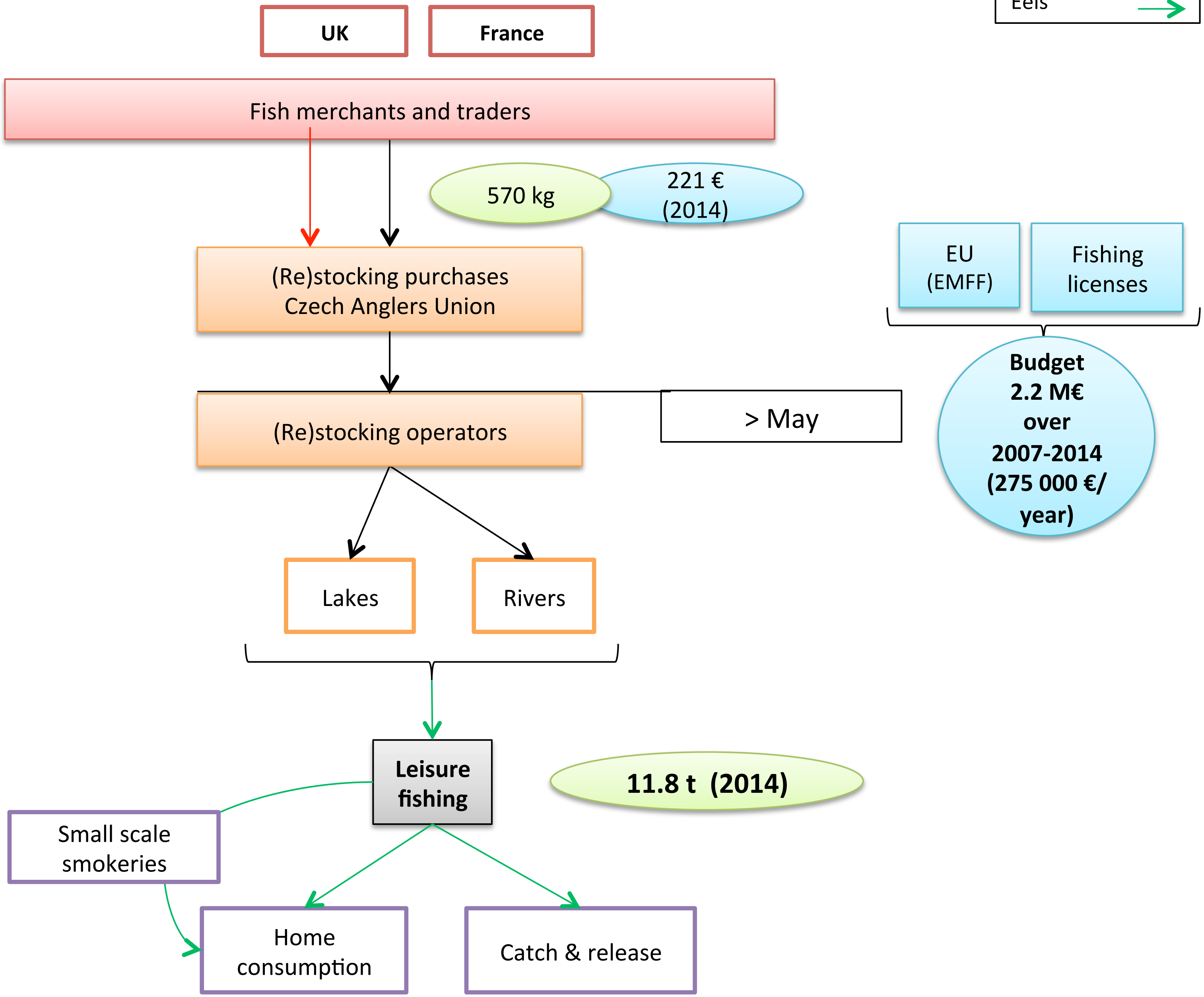
Outlook of the Czech glass eel chain



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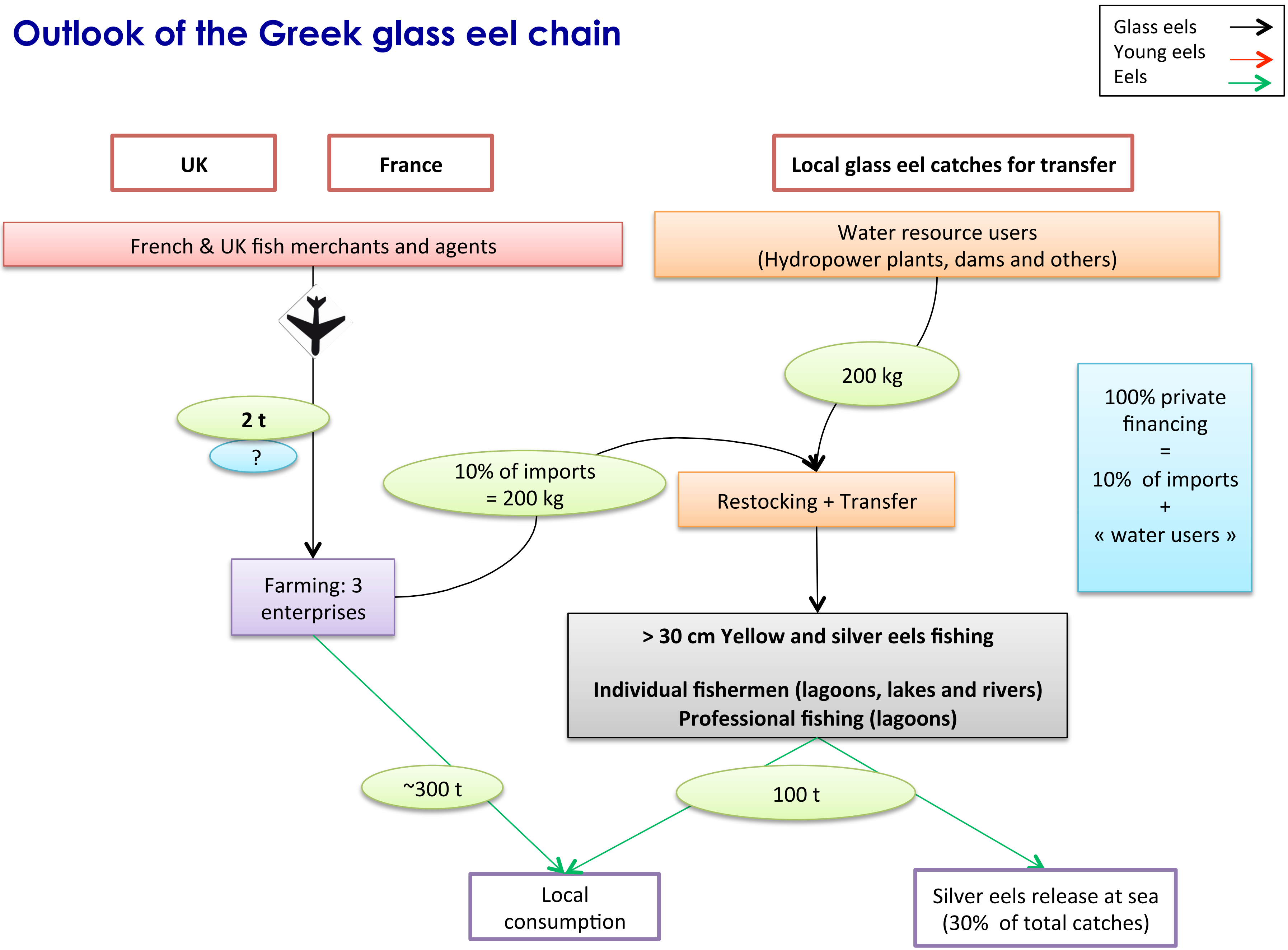
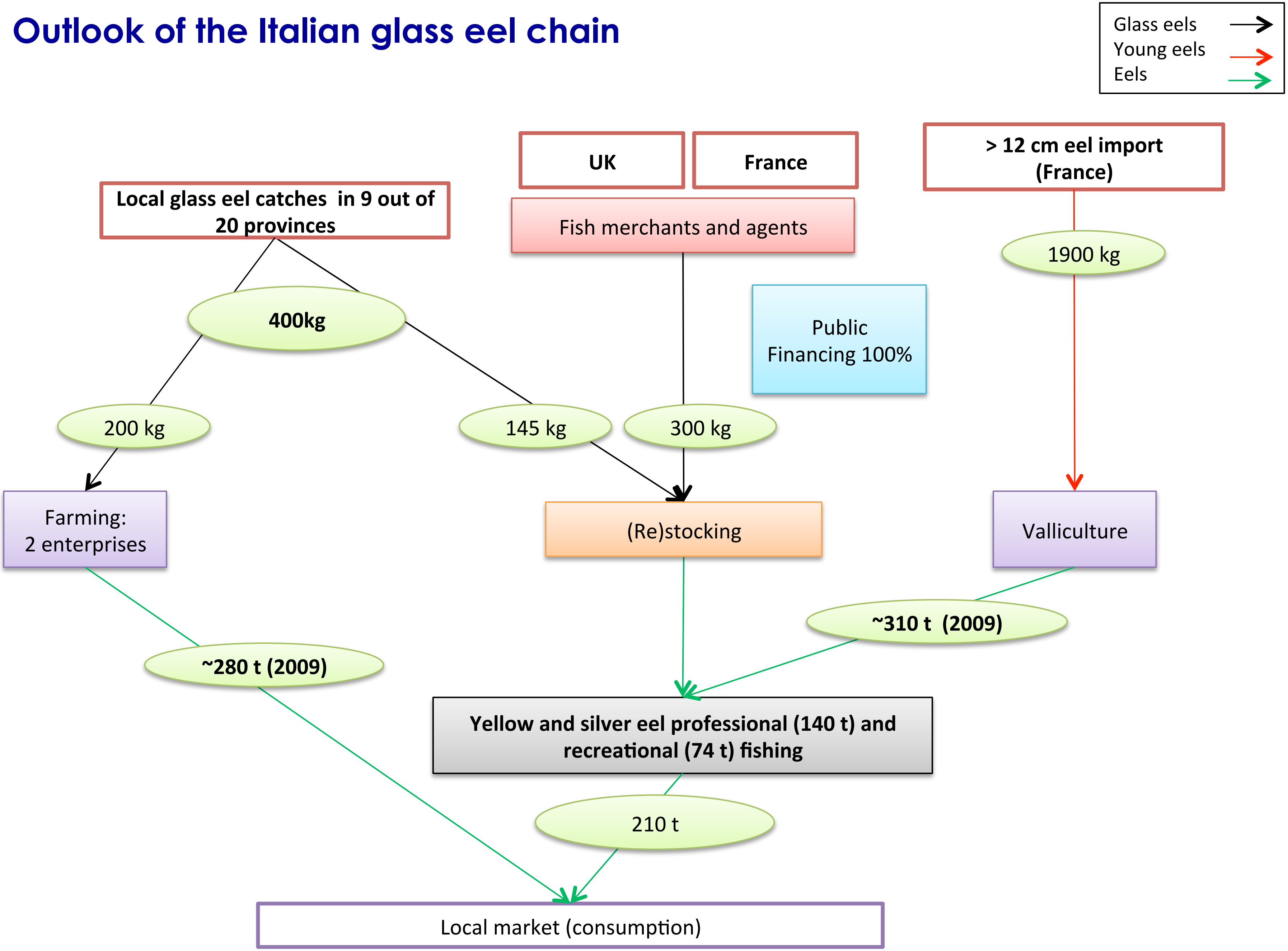
Outlook of the Greek glass eel chain



Outlook of the Italian glass eel chain



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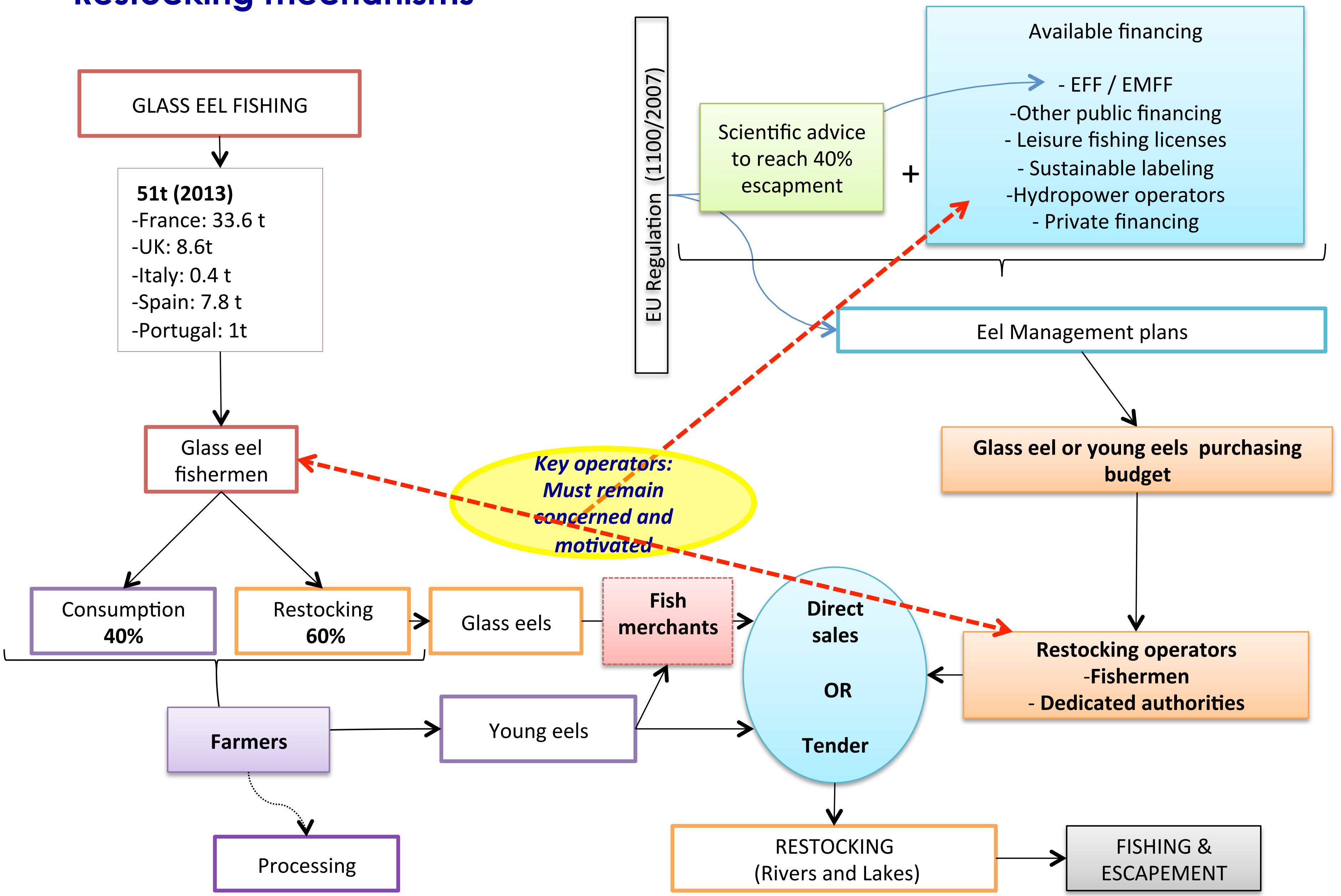
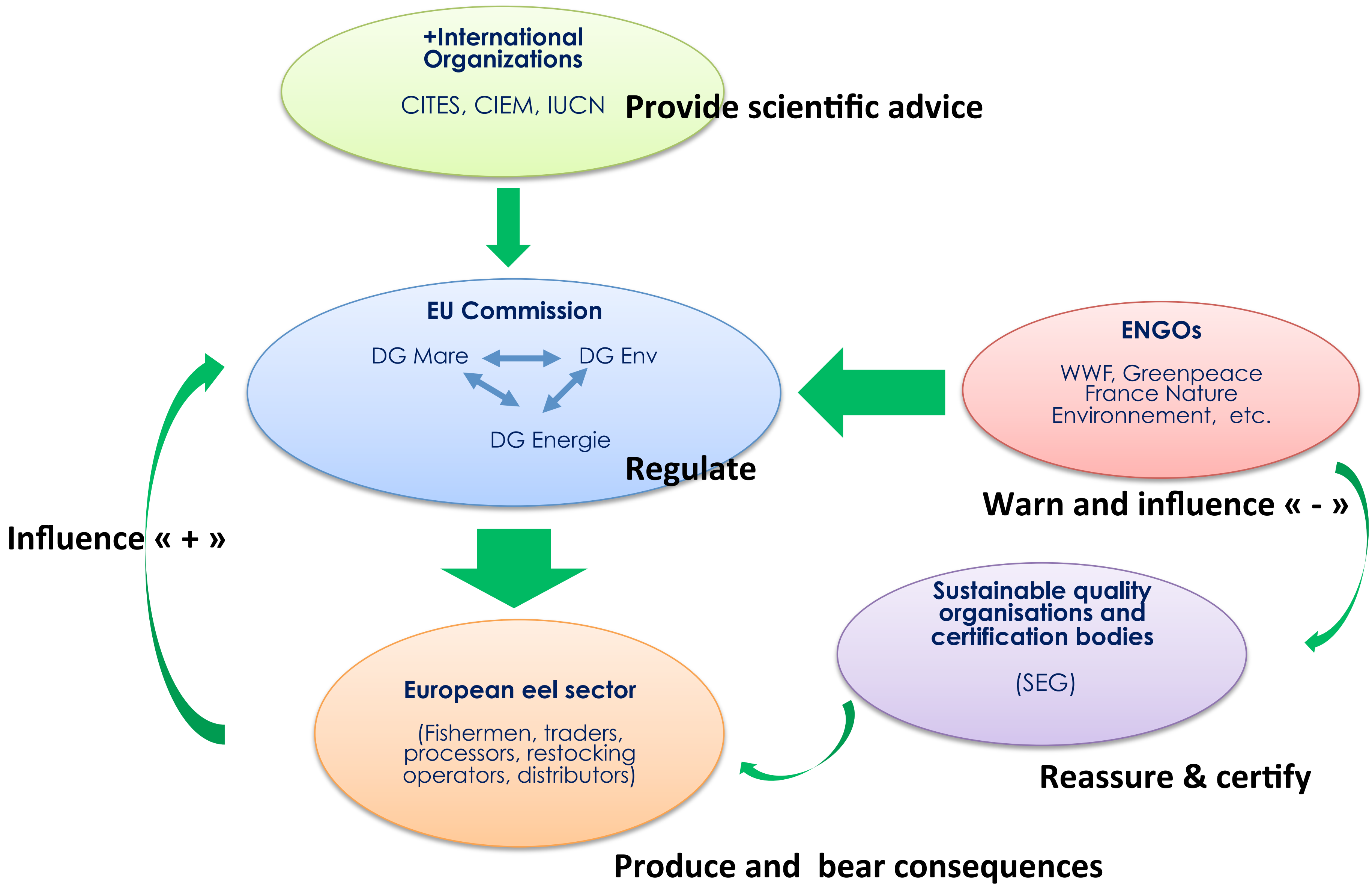
Thematic approach of the European eel sector

Restocking mechanisms



Understanding the actors roles and interactions



Contradictions / Distortions / Discrepancies within the EU eel market chain: focus on glass eels

- Fishermen ⇔ Traders
- French traders ⇔ European traders
- Northern EU ⇔ Southern EU
- Pro SEG ⇔ SEG skeptics
- Pro export ban ⇔ Anti export ban
- Manual fishing ⇔ « Trawling »
- Pro Restocking ⇔ Restocking skeptics
- Conservationists ⇔ Hydropower companies
- DG Mare ⇔ DG Env – DG Energy
- Supplying countries (West EU) ⇔ purchasing countries (Eastern EU)
- Legal operations ⇔ Illegal operations
- EU member states ⇔ EU Commission
- ENGOs ⇔ European eel supply chain
- Etc.

The EU eel sector: focus on consumption

- A species with strong cultural roots, and strong segmentations
  - Long tradition of festive product (Christmas, Easter, family occasions), "emotion food"
  - Effect of eel size:
    - glass eel: Spain
    - 120-200 g: Netherlands
    - 150-300 g: Belgium, Denmark
    - 300-500 g: Germany, Baltic countries
    - 500-1000 g: Poland
  - Effect of the mode of production
    - Fishing (less fatty): fresh- cooked and smoked
    - Breeding (fattier) : smoked
- A restricted distribution
  - Near absence in supermarkets due to ENGOS campaigns
  - Mainly in fish shops, markets, traditional and Japanese restaurants
  - Some direct and Internet sales
  - Accordingly high consumer prices (superior to those of salmon)
    - 20 €/kg for fresh eel
    - 40-90 €/kg for smoked eel filets
    - 200-600 €/kg for glass eels

The EU eel sector: focus on consumption

- Consumption declining everywhere, due to
  - ENGO campaigns resulting in a 25 to 50% declining consumption in Germany, Denmark and Holland for smoked products
  - Aging consumers population
  - Expensive product
  - Traditional product in France, concentrated in limited areas (West coast & lakes areas)

  However,
  - Some glass eel consumption resuming in UK and France due to very low prices in 2014
  - Lesser impact for products smoked and consumed traditionally (small scale processing and direct sales)

- An image to be revived
  - Very fat fish
  - A weird appearance (snake form)
  - Consumers normally don't know much about the product
  - Distributors are not eager to promote eel

- A very sensitive yet essential communication
  - Communication is key to revive consumption on the long term
  - Based ion a paradox: promote consumption of an endangered species
  - Need to tell the customer a fascinating story about eel

The EU eel sector: focus on consumption

Good communication assets

- Toward NGO’s, Supermarket chains, EU Commission
  - Today: a responsible resource management based on good practices (SEG)
  - Tomorrow: a sustainable management of the resource supported by recognized certification program (SEG/SES)
- Towards the consumers
  - A migrating fish which life cycle still bears a certain level of uncertainty and mystery
  - A very “old” species with many stories and legends to tell
  - New taste to experience (smoked eel filets in France)
  - Could stand as the symbol of the EU: panmictic population spread over ~all EU member states
  - Endangered, yet not in extinction and benefiting of intensive care (ex: Dupan in NL)
- Towards hydropower companies and water « users »
  - An obvious « Greenwashing » opportunity that would benefit companies, but commitment is the first objective

The EU eel sector: focus on consumption

Focus on **SEG** (Sustainable Eel group)

- A clear picture at first sight: a good practices standard and certification. SEG has a recognized edge and offers a strategic advantage for restocking and farming markets (selection criteria, good support of the product image)
- A more controversial positioning, as perceived by French, German, Dutch and Spanish operators: promoting a « sustainable » eel cannot be justified so far and is considered as an abusive statement that cannot be used to promote the product at the consumer level.
- A criticized governance, considered as insufficiently democratic (no election process), monopolistic (a single certification body), and not enough federative and attractive (no French representative in the standard panel)

NB: neither MSC nor ASC have been able to develop a similar standard for eel. It is an opportunity for SEG, which is by far the most advanced certification but does not enjoy the same level of notoriety.

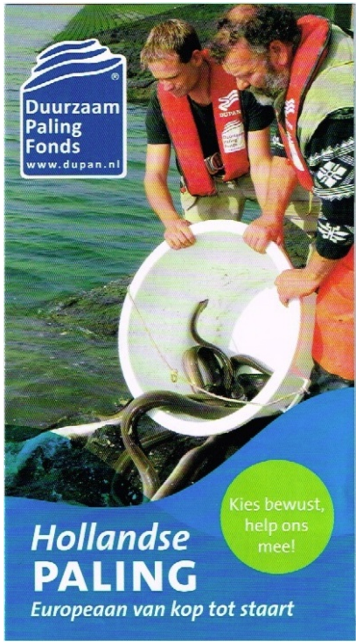
The EU eel sector: focus on consumption

Focus on **DUPAN** and other similar labels

- Clear objectives:
  - Develop public awareness about actions carried out by the eel sector(fishermen, farmers, processors, traders) to preserve the species and rebuild the stocks
  - Invite consumers to participate actively in these actions

- No governance problems

- Dramatic success for DUPAN, but a failure for the similar German initiative, considered by NGO's as useless communication



The EU eel sector: focus on restocking

- A strategic management choice but not a legal obligation in the EU 1100 / 2007 regulation
  - Some countries do not restock much (Spain)
  - Germany restocks very intensively

- Different methods and objectives according to countries and operators
  - Glass eels (F, NL, GER) / young eels (DK, PL, ALL, LIT)
  - Restocking in rivers(F, NL), in lakes (EST, PL), in coastal waters (SU, ALL)
  - Stocking for further catches (fishermen associations) , restocking for species conservation (governments)

- Various and limited sources of financing
  - A mix of EU EMFF / government / region / funding and private funding (fishermen, Hydropower companies)
  - EU financing will not increase, and may well decrease
  - Public financing varies from country to country
  - Private financing varies too, but tends to increase.
  - DUPAN financing system is an example that should be followed in all EU countries

  => Other than the arising of new financing sources, restocking intensity can only depend on glass eels buying price

- Restocking efficiency is controversial
  - Scientist do not agree on that point
  - Without consensus, precaution principle plays against glass eel and eel fishing
  - Other factors endangering the species are not sufficiently taken into consideration (pollution, illegal fishing, rivers ecological continuity)

- Hydropower companies stand is quite contradictory (France)
  - They finance survey and studies, restock above dams, but
  - They do not invest enough in obstacles improvement => do not prove their good faith in species conservation

The EU eel sector: focus on restocking

- Timeframes do not tally
  - Fishing and restocking do not take place simultaneously
  - Tenders final decision further delays restocking operations

		Nov.	Déc.	Jan.	Féb.	March	April	May	June	July	August
Glass eel fishing (coastal waters)	France										
	United Kingdom										
Suitable température (> 8°C) to release glass eels into inland waters	Holland										
	Germany										
	Denmark										
	Poland										
	Sweden										
Tenders for restocking operations	Launching										
	Decision										
	Implementation										

- No contact nor communication so far between glass eel suppliers (fishermen) and their final customers (restocking operators)
  - 3 to 4 intermediary sales that prevent any « win-win » communication
  - Language barriers between EU countries
  - Administration procedures are not standardized between countries

Fisherman	Fish Merchant	Farmer	Trader	Restocking operator	Nb sales
					2
					3
					4
					2

The EU eel sector: focus on restocking

- Some pending questions
  - Glass eels translocation: what actual effects on mortality, growth, migration, stocks improvement?
  - Restocking conditions: How do eel size and water temperature affect the restocking efficiency?
  - What glass eel density at the river mouth would allow the deduction of some quantities from the upstream migrating population (for restocking) without jeopardizing the eel population of the said river?

- Cross boarder cooperation approaches to develop:
  - About restocking efficiency (2012 PAWSON report)
  - About « balance zero » investigated by DUPAN (no effect of glass eel sampling on stocks)
  - On financing (R&D programs, « European DUPAN » label)
  - On setting a common set of defense arguments to be brought to opponents' attention (EU Commission, ENGOs, supermarkets and consumers).

The EU eel sector: focus on restocking

seldom
frequent choice
permanent choice

Country	technical choice		Total sales from fishermen to restocking	Yearly budget	
	Glass eels	Young eels		Total (k€)	Public subsidies
HOLLAND			2 2	375 60-100	100%
GERMANY	On average Depends on länder	On average Depends on länder	3 4	335	60%
			3	750	80%
			4	300	80%
			3	380 1200	50%
DENMARK			3	420	?
FRANCE			3	2 000	96%
UK			1	1 ton glass eels (foc)	0%
SWEDEN			3	252 (purchases) + 255 (quarant.)	84%
ESTONIA			2	147	66%
POLAND			Public: 3 Private: 4	500 500	100% 0%
SPAIN				Donation (eels)	0%
CZECH REP.				275	0%
GREECE				100-120 10% catches + private financing	0%
ITALY				130	1%
LITHUANIA				90-100	90%

The EU eel sector: focus on farming

- Highly concentrated in Holland and Germany: respectively 50% et 25% of European volumes

- Strong technological edge from Dutch and Danish operators, and particularly from Nijvis group

- « Rule of thumb »: 1 ton glass eel yields ⇔
  - 300 tons fresh eels commercial size (German ratio)
  - 175 tons smoked eel filets (Dutch ratio)

  - 1 ton of glass eels in natural environment yields to 3 to 100 t of silver eels (according to various scientific sources)

- Strong links between farms and the processing industry (smokeries) and between farms and restocking operators (glass eels holding in tanks, and young eels production)

- Controlled reproduction program on the way (Pro Eel), but no expected outcome before 10years

The EU eel sector: focus on farming

- Farming production has decreased by ~75% since the beginning of the eel crisis

- Unsold inventories in 2014: ~1500 t = ~30% of yearly production
  => « panic selling » below cost price, that further worsens the market
  - Average market price (2013): 7-9 €/kg ex farm
  - 2014 selling price: 5-6 €/kg

- Artificial reproduction is a true perspective to release the fishing pressure on glass eels, but
  - NGO's may not understand that in the meantime, the eel sector, as the main user of this research program, has to be protected and operating
  - What future for this program should the resource come back for good?
  - What future for the resource (through restocking) should this research program be a success?

The EU eel sector: focus on glass eel fishing

- Different fishing time slots from South to North of Europe

- Professional status and production costs vary:
  - Leisure fishing (UK, « pocket money) vs. professional fishing (France, main income)
  - Investment: 250 € (UK, hand fishing from river banks), 2000€ (Spain, hand fishing from light boats) 20 000 € (France, trawling in wide river mouths)
  - ⇒ Profitability distortions and different socio-economic stakes

- Various fishing methods => uneven quality:
  - Survival rate (<1% to > 50%)
  - Glass eel fishing image (« soft » fishing vs. « hard » fishing)
  - Restocking image

- Better image for a « soft fishing » at the EU level
  - Useless for the Spanish market for direct consumption
  - Important for the farming market
  - Crucial for the restocking market

The EU eel sector: focus on glass eel fishing

- Very strong recruitment of high quality glass eels in France, UK and Spain,
  - For the past 3 years
  - 2014 close to 1980's situation

- Some recruitment in countries formerly deserted by glass eels: Holland, Germany

- Price collapse further to:
  - Offer increase (strong recruitment)
  - Demand decrease (smoked eel consumption decrease)

  => Price decrease from 300-400 €/kg (2010-2013) to less than 50 €/kg (late 2014 fishing campaign)

The EU eel sector: focus on <u>export outside the EU</u>

EU/Cites Export ban outside the EU

- The initial objectives of the ban:
  - Preserve the resource
  - Keep glass eels within the EU
  - Keep glass eel prices low enough to facilitate restocking

- Consequences of the ban
  - The whole eel sector has been badly affected: fishing boats dismantling, retrenchments, buying price to fishermen decreasing below breakeven point.
  - Outbreak of organized illegal glass eel export to Asia

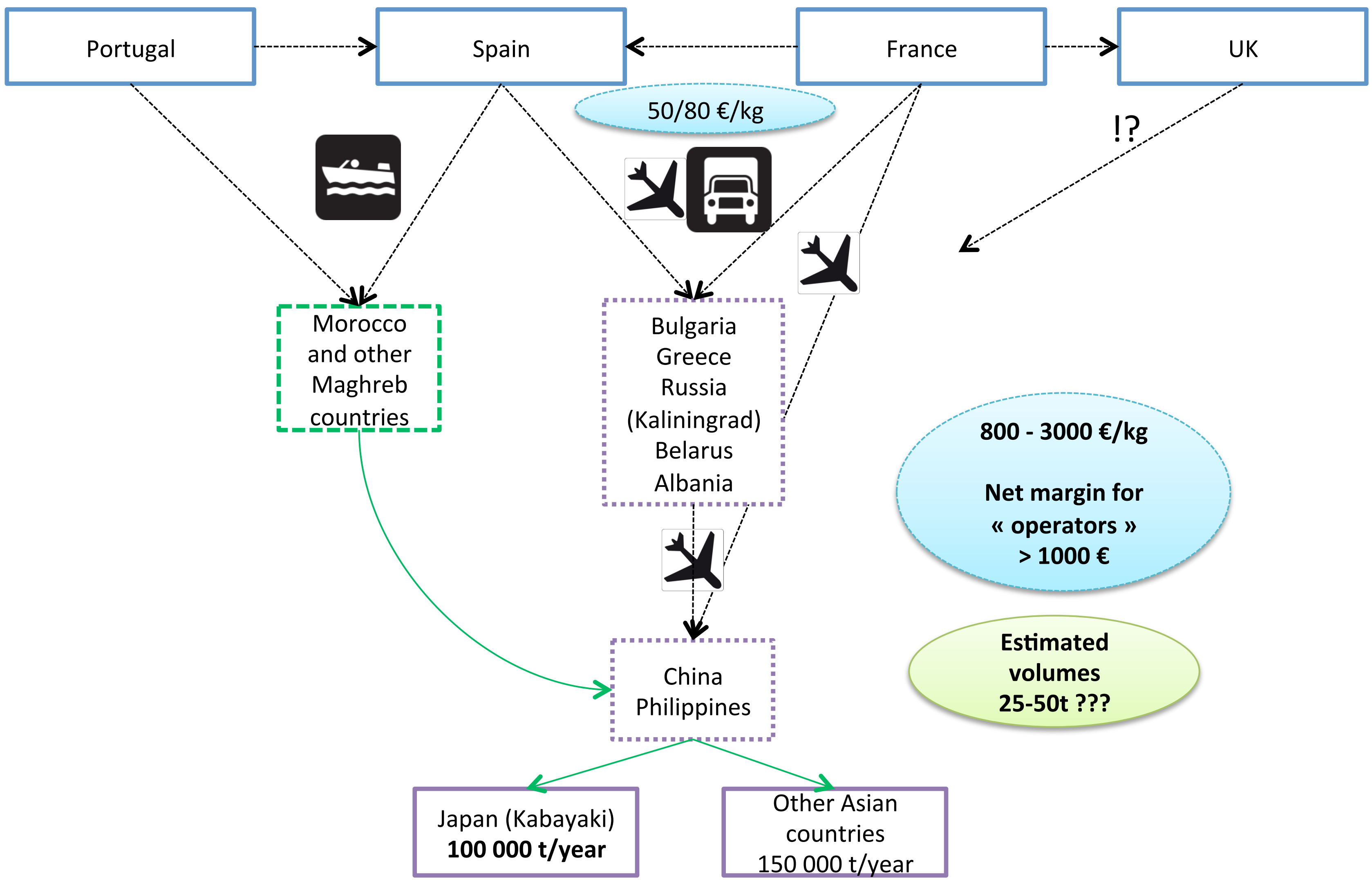
  ⇒ Official market figures do not mean much any more

  But:
  - Restocking has been intensified due to low prices

- Disappointing results of the EU decision, and questionable decision of the eel sector to refuse a 14 t export quota offered by the EU commission in 2009

The EU eel sector: focus on export outside the EU

Illegal glass eel export rumors and facts



The EU eel sector: focus on export outside the EU

Illegal glass eel export rumors and facts

- Volumes estimation
  - « very important quantities »
  - Figures range around 25 t/year to > 50t / year
- Organizations
  - Many routes
  - Operators are well organized and move from country to country depending on the repressive pressure
  - Repression : is also well structured in France (Onema, Ministère de l'Intérieur) and in Spain (Guardia Civil / SEPRONA) with significant results (« Operacion suculenta ») but a strong feeling of unachievable objective.
- Suggested points of improvement
  - Improve full traceability and controls
  - Implement specific commodity codes for glass eels to help traceability
  - Standardize EU commercial documents
  - Connect member states administrations in charge of checking their national operators' invoices

The EU eel sector: focus on export outside the EU

On what grounds should the EU / Cites ban be renegotiated?

- Cites does not prevent the trade of endangered species but demands their trade to be under control

- The EU export ban has been decided « urgently » and upon insufficient and unchallenged scientific grounds

- 2 conclusions :
  - Scientific work has to be updated and agreed upon.
  - It is unfair and hazardous to suddenly deprive fishermen from their vital resource. A transition period had, at least, to be set in order for them to adapt to the situation.

The EU eel sector: focus on export outside the EU

What arguments can be set forth to renegotiate the EU Ban?

- Glass eel fisheries may well disappear resulting in the whole sector to be affected: no more smoking, nor restocking
- Inland fishermen have to be taken care of, as they have a key role as witnesses of the rivers health
- Fishermen are not the only cause of eel depletion, but they are the first victim of the ban
- Glass eel recruitment has been excellent in 2014, for the third year in a row
- Export may be used to finance restocking, by implementing an export tax
- Such tax could also be used to finance river continuity programs
- Why cannot grown up eel be exported from the EU whereas the same product can be exported from Maghreb countries?

The EU eel sector: focus on export outside the EU

What difficulties in renegotiating the export ban?

- As long as the resource has not come back and stabilized at a satisfactory level, Cites and the EU will not allow any export.

- Even if an export quota was set for finished product, a « made in France » Kabayaki may not be welcome on the Asia market

- The political context is not favorable to a reopening of the export: pure conservationists have strengthened their position within the EU Commission, and rivalries between General Directories are strong.

- An export quota for glass eel could not be accepted without an equivalent import quota for Asian eel to the EU, resulting in a price war that already occurred in the past.

The EU eel sector: focus on environmental issues

- Hydraulic issues are being addressed by some countries as a major cause of the species endangering

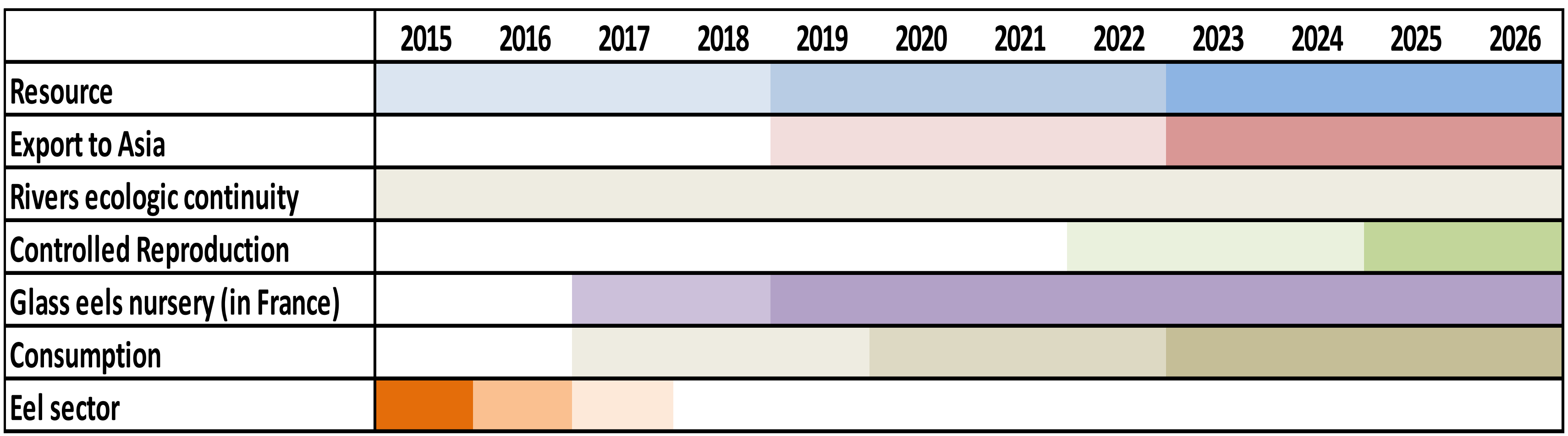
- River ecologic continuity
  - As major producing country, France does not keep its promises on improving its 1200 migratory obstacles
  - Hydropower lobby has no sufficient concern about improving the ecologic continuity of the French rivers

- In the Netherlands: recent investigations about the origin of the species depletion confirms the effects of the building of polders and dykes. The closing of inland seas may have resulted in:
  - Glass eels recruitment has become impossible
  - Fresh water of Inland seas does not press eels to migrate upstream to continental waters
  - Downstream migration has become impossible.

- Such constructions were decided to improve people safety (further to 2000 flooding casualties in 1953), and sanitary security (drinking water supply for Amsterdam). « Today, similar objectives could definitely not be met using the same means »

What perspective for the European eel sector?

- Parameters that can help improve the current situation will become effective at different timeframes
  - Resource reconstitution
  - Export outside the EU
  - River ecological continuity
  - Controlled reproduction
  - Consumption
  - Glass eel nursery (in France)



- How long can the eel sector survive until a positive change occurs?

What perspective for the European eel sector?

- The current and future difficulties are not only those of the French eel fishing sector, but those of the whole European eel sector. French operators must realize that cooperation with the other EU countries is the only way to face this challenge

- Given the resource condition, the *resource* ⇔ *sector* issue is relevant.

- Although everyone agrees on the « resource » point (which has to be saved and restored), the « sector » issue divides opinions into two :
  - Ban eel fishing to protect the resource => terminate the sector
  - Use the resource to protect it => preserve the fishing and processing sectors

- However, the EU 1100/2007 regulation follows the **« use to protect »** option, which is considered by pure conservationists as a "soft compromise » rather than a firm stand.

- The **European eel sector** as a whole has to change this wrong perception

Tackling 2014 threats and grabbing 2014 opportunities

- It is the right moment to have the « European eel sector » concept blossom since all member states and operator do suffer:
  - fishermen (eels and glass eel): do not live out of their fishing
  - Farmers: cannot sell their inventories
  - Processors: reduce their production to adapt to a shrinking consumption
  - Certifications bodies (SEG): are losing members
  - National authorities: face a long term crisis
  - Scientists: cannot find enough financing

- The review of the **EU1100/2007 regulation** is a risky and key step, but a good opportunity to launch that concept and speak with one "European eel" voice.

Tackling 2014 threats and grabbing 2014 opportunities

- The European eel sector **as a *united* whole** to emerge as a reliable and pro-active counterpart to the EU, and key international organizations**:** EU, Cites, ICES, eNGOs, public opinion and consumers

- The European eel sector to address **priorities**:

  - **Adapt communication tool to target:**
    - A « European SEG » to talk to officials and industries concerned
    - A « European DUPAN » to talk to consumers

  - **Succeed in keeping the EU 1100/2007 regulation framework unchanged**

  - **Act on the identified leverages:**
    - Support the glass eel fisheries through an EU SEG, full traceability, stringent controls and closer links between fishermen and European restocking operators
    - Support consumption through a « European Dupan »
    - Support and justify restocking through *ad hoc* scientific cooperation
    - Unlock the export ban through a common negotiation with the EU authorities based on a possible tax on imports that would support eel restoration actions
    - Farming: include eel into the « European aquaculture project », and support the « Pro Eel project »
    - Environmental issues: press the relevant authorities to balance the pressure equally on all causes that endanger eel and not only the fishing industry, and address that issue at the European level with all parties concerned.

Tackling 2014 threats and grabbing 2014 opportunities

- The French eel industry to address its weaknesses:
  - **Improve French glass eels quality** to enhance the image of the French glass eel for restocking and farming
    - Accurate analyze of the glass eel fishing sector
    - Where / when / how can ‘UK quality » glass eel be caught in France
    - Where / when / how can French fishing techniques be improved?
    - How can a «French controlled quality eel » be developed, and /or, how to join SEG?
  - **Improve eel fishing profitability**
    - Cost analysis and comparison between EMUs and fishing fleet
    - Improvement of the fishing gears and methods in a cost effective objective (hand fishing , less quantity /better quality, fish on order, certified fish etc..
  - **Get a better market understanding**
    - Identify the restocking and farming operators in other EU member states
    - Initiate contacts and communication between the fishing sector and the final users
- The French eel sector to profile itself as a leading force of the European sector
  - Organize in France a European eel symposium aiming at finding common and global solutions to the current situation
  - Unlock sensitive issues and possible causes of misunderstanding between EU operators
  - Create consensus spirit
  - Identify urgent research issues that have to be investigated
  - Overcome misunderstandings and join forces to address the problems at EU level in a unified way

Appendices

Contact list

Country	Contact	Address / Business		Position
France	Philippe BOISNEAU	CONAPEDD	Freshwater Professional Fishermen Organisation	Chairman
	Marc-Adrien MARCELLIER	SEG France	SEG	France's Representative
	Didier MOREAU	ETHNOCONSERVATION	NGO	France's Representative
	Patrick PROUZET	IFREMER	Research institute	Biologist
	José JOUNEAU	COREPEM	Vendée-Loire Professional Fishermen Organisation	Chairman
	José AGUIRREBARRENA	AGUIRRE BARRENA	Fishmonger	General manager
	Vianney LOIZEAU	AGUIRRE BARRENA	Fishmonger	Salesman
	Jérôme GURRUCHAGA	GURRUCHAGA	Fishmonger	General manager
	Cécile PAGES	CRPM Languedoc Roussillon	Languedoc Professional Fishermen Organisation	General secretary
	Nicolas MICHELET	CNPMEM / CONAPEDD	National Professional Fishermen Organisation	Attaché
	Thomas NIELSEN		Trader, biologist	Trader, biologist
	Daniel DELAUNAY	CRPM Aquitaine	Aquitaine Professional Fishermen Organisation	Chargé de mission
	Eric FEUNTEUN	MNHN	Museum National d'Histoire Naturelle	Biologist
	Fabrice PIVIDORI	PIVIDORI	Fishmonger	Manager
	Jérémie SOUBEN	ARA FRANCE	Eel restocking association	Attaché
	Mireille SEGUIN	GIE AIGUILLON	Fishmonger	Board member
	Christophe POULELAOUEN	ARMARA	Wholesaler	Buyer
	Aurélie DUBROUE	AUCHAN Bordeaux	Multiple retailer	Counter clerk
	M. LOPEZ	CARREFOUR Balaruc	Multiple retailer	Counter clerk
	Rodolphe ZIEGLER	DEMARNE Rungis	Wholesaler	Manager
	Stéphane GEOFFROY	FISH BRENNE	Fish processing	General manager
	Jean-Christophe MOLL	KAVIARI	Fish processing	Sales director
	Edouard ROLLAND	LE FUMET DES DOMBES	Fish processing	President
	M. GUILLEBEAU	LECLERC Toulouse	Multiple retailer	Counter clerk
	Isabelle GRUMILLIER	SUPER U La Turballe	Multiple retailer	Counter clerk
	Olivier AZARETE	CRPM Aquitaine	Aquitaine Professional Fishermen Organisation	Vice président CMEA
	Philippe TIMOTHEE	CRPM Languedoc Roussillon	Languedoc Professional Fishermen Organisation	Eel commission member
	Marco CIAMBELLI	Ministry for Environment, Sustainable Development and Energy	CITES/ Direction Inspection Foreign Trade	Attaché
	Erwann LE FLOC'H	SMIDAP	Regional Seafood Development Board - Loire Vendée	General manager
	Mme MATTHIEU	Ets FOUCHER MAURY	Fishmonger	Manager
	Benoit CROSSON	OP ESTUAIRES	Producers Organisation	Sales director
	Benoit BOURBON	DPMA / Ministry for Agriculture & Fisheries	Bureau Pisciculture Pêche continentale	Attaché

Contact list (continued)

Country	Contact	Address / Business		Position
Denmark	Michael ANDERSEN	DANISH FISHERMEN ASSOCIATION		Attaché
	Lene JENSSEN SCHEEL-BECH	DANISH DIRECTORATE for FISHERIES/ Minisitry of Food, Agriculture & Fisheries	Denmark's EMP	Attaché
	Michael INGEMANN PEDERSEN	DANISH TECHNICAL UNIVERSITY		Eel biologist
	Brian THOMSEN	DANISH AQUACULTURE ASSOCIATION		General manager
	Mogens MATHIASEN	ROYAL DANISH SEAFOOD	Eel farming - Processing	CEO
Netherlands	Alex KOELWIJN	DUPAN Foundation		Chairman
	John van DOOREN	PASSIE VOR VIS ; SKRETTING	Eel farming ; Feed producer	Manager; saleman
	Jaco KOMAN	KOMAN	Trader, Fish processing	Directeur
	William SWINKELS	NIJVIS	Eel farming - Processing	CEO
	Jaap QUAK	SPORTVISSERIJ NEDERLAND	Leisure Fishermen Organisation	Eel attaché
	Andries KAMSTRA	IMARES / WAGENINGEN	Research institute	Eel biologist
	Arjan HEINEN	COMBINATIE VAN BEROEPVISSERS /	National Professional Fishermen Organisation	Attaché
	Mirjam SNIJDELAAR	MINISTRY of ECONOMIC AFFAIRS	Netherlands EMP	Attaché
Germany	Marina ROTERMUND	LANDESAMT für LANDWIRTSCHAFT, UMWELT unfd LÄNDLICHE RÄUME	Schleswig-Holstein's EMP	Officer
	Siegfried SPRATTE	LANDESAMT für LANDWIRTSCHAFT, UMWELT unfd LÄNDLICHE RÄUME	Schleswig-Holstein's EMP	Attaché
	Ronald MENZEL	DEUTSCHER FISCHEREI VERBAND / Eel Commission	National Professional Fishermen Organisation	Vice chairman - Eel commission
		FISCHEREISCHUTZ GENOSSENSCHAFT HAVEL Brandenburg	Brandenburg's EMP	Coordinator
	Thomas SCHAARSCHMIDT	LANDESAMT für LANDWIRTSCHAFT, LEBENSMITTELSICHERHEIT und FISCHEREI	Mecklenburg-Vorpommern's EMP	Attaché
	Markus DIEKMANN	LANDESAMT für VERBRAUCHERSCHUTZ,und LEBENSMITTELSICHERHEIT	Nieder-Sachsen's EMP	Attaché
	Herman BENTLAGE	ALBE FISCH FARM	Eel Farming - Processing	CEO
	Arne KOOPS	DEUTSCHER FISCHEREI VERBAND /Aalversandstelle	Restocking operations	General manager
	Uwe BRÄMICK	INSTITUT für BINNENFISCHEREI	Inland Fisheries research	General manager
Spain	Abbat MAYOZ	HERMANOS MAYOZ	Trader - Fish Processing	General manager
	Estibaliz DIAZ	AZTI	Basque Country research institute - Spain's EMP	EMP coordinator
	Rodolfo BARRERA OROZCO	VALENCIANA DE ACUICULTURA	Eel Farming	General manager
	José Manuel Vivas Prada	GUARDIA CIVIL / Servicio de proteccion de la Naturaleza (SEPRONA)	Spanish Police	Jefe de la UCOMA - Officer
	Mercedes LASSO	Minsitry for Economy	CITES/ Direction Inspection Foreign Trade	Attaché
Sweden	Johan WAGNSTRÖM	Skåne county board, Kristianstad.	Sweden's restocking program	Glass eel buyer
	Richard FORDHAM	SCANDINAVIAN SILVER EEL	Eel farming - Quarantine facility	Manager
	Jens PERSSON	Swedish Agency for Marine and Water Management (Hav och Vatten), Gothenburg		Attaché
	Willem DEKKER	Swedish Univ. of Agricultural Sciences, Institute of Freshwater research	Research institute	Biologist
	Hakan WICKSTRÖM	Swedish Univ. of Agricultural Sciences, Institute of Freshwater research	Research institute	Biologist
Poland	Igor WAWRZYNIAK	Ministry of Agriculture and Rural Development	Fisheries department	General manager
	Tomasz NERMER	National Marine Fisheries Research Institute	Poland's EMP	Biologist
	Piotr Debowsky	Alldan	Glass eel trading	General manager
Estonia	Jaanika KALJUVEE	Lake Võrtsjäve Fisheries Devpmt Agency	Eel restocking coordination	Manager
	Ain JARVALT	Centre for Limnology, Estonian University of Life Sciences,	Research institute	Scientist
	Raivo PUURITS	Triton PR AS	Eel farming - Processing	General manager
United Kingdom	Andrew KERR	SEG (SUSTAINABLE EEL GROUP)	Sustainable Eel Standards	Chairman
	Peter WOOD	UK GLASS EELS	Fishmonger - Trader	General manager
	Martin JAMES	Environment Agency	Fisheries regulation	Environment & Business Advisor
	Dye FRANCIS	Severn & Wye Smokery	Fish processing	Responsable communication
Chzech Rep.	Pavel VRANA	CZECH ANGLERS UNION Economic Department	Leisure Fishermen Organisation	Attaché
Greece	Dr. Emmanuil (Manos) KOUTRAKIS	FISHERIES RESEARCH INSTITUTE Senior Research Scientist	Research institute	Senior Research Scientist
Eur. Commission	Evangelia GEORGITSI	DG MARE	European Commission	Attaché
Italy	Dr. Eleonora CICCOTTI	Università Tor Vergata - Dipartimento di Biologia - Laboratorio di Ecologia Sperimentale	Research institute	Scientist
Latvia	Janis BIRZAK	Institute of Food Safety, Animal Health and Environment (BIOR)	Latvia's EMP administration	Biologist