

Advice

European Market Observatory for Fisheries and Aquaculture (EUMOFA): Suggestions of studies to be integrated in the Work Programme (2023)

Brussels, 3 February 2023

1. Background

The European Market Observatory for Fisheries and Aquaculture (EUMOFA)¹ is a market intelligence tool on the European Union fisheries and aquaculture sector, developed by the European Commission. It aims to increase market transparency and efficiency, analyse EU market dynamics, and support business decisions and policymaking. In the past, the Market Advisory Council (MAC) adopted advice with suggestions of studies to be conducted by EUMOFA², which were graciously accommodated in the work programme of EUMOFA.

The ex-post information provided by EUMOFA on volumes, values and prices of fisheries and aquaculture products, including imports and exports, is greatly appreciated by the members of the MAC. Considering the development of a new work programme for EUMOFA, the MAC committed to provide new topics to DG MARE for both price structure analyses and thematic analyses, which can potentially be undertaken by the experts.

2. Thematic Analyses

These analyses consist of punctual market studies made upon request of DG MARE. These respond to a specific need of the sector or policymakers.

2.1. Sea bass

Considering the lack of detail in customs trade data, it would be relevant to undertake a detailed analysis on the production as well as on the imports and exports, particularly from

¹ <https://www.eumofa.eu/>

² Advice was adopted in 2020: <https://marketac.eu/clarifications-on-eumofa-studies/>

third countries such as Turkey, of this species. In terms of geographical scope, the study should focus on Spain, Greece, and Italy.

2.2. Sprat

In line with previous advice, it would still be relevant to undertake a detailed analysis of the market of sprat for consumption, which should cover demand, products, buyers, prices, and relevant export markets in the different forms. In terms of geographical scope, the study should focus on Sweden, Denmark, and Poland.

3. Other issues

There are additional issues that should be considered in the work of EUMOFA via the price structure analyses, thematic analyses or even the annual “The EU Fish Market” report.

3.1. Russian invasion of Ukraine

On 24 February 2022, Russia launched an invasion of Ukraine. This crisis created new major disturbances and changes in the market of fishery and aquaculture products. Therefore, it would be relevant to analyse the impact of the war on the prices along the supply chain, plus whether the price increases were paid by the consumer or not.

3.2. Data on fish caught through trawling methods

Considering the increasing relevance, at EU-level, of discussions around trawling activities, it would be relevant to analyse trawling and market data. This should assess the fish going through Producer Organisations, quantity, price, and share.

3.3. Selling methods at first sale and after first sale

The different selling methods of fisheries and aquaculture products in the EU should be analysed. The overview could show the evolution of the selling structures, the transition between existing methods and the impact of digitalisation as well as the proportion of online

sales. In previous advice³, the MAC recommended the assessment of ongoing changes in consumer habits, such as the emergence of e-commerce, the decline of traditional sales channels, and the decrease in time dedicated to grocery shopping and cooking.

4. Conclusion

In summary, the MAC suggests the integration of the following topics in the most recent Work Programme of EUMOFA:

- Thematic Analyses:
 - Sea bass: Spain, Greece, Italy
 - Sprat: Sweden, Denmark, Poland
- Other issues:
 - Russian invasion of Ukraine
 - Data on fish caught through trawling methods
 - Selling methods at first sale and after first sale

³ See recommendation e) of the [advice on “health and environmental value of seafood”](#) of 8 October 2021.