

Advice

European Market Observatory for Fisheries and Aquaculture (EUMOFA): Price structure analysis of the supply chain of EU tuna sector within the global tuna market – Scope & Priorities

Brussels, 29 September 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.

On 30 March 2023, the Market Advisory Council (MAC) sent advice to the European Commission suggesting a study on the supply chain of the EU tuna sector². In the letter of reply, DG MARE encouraged the MAC to narrow the scope of the request and to prioritise among the different topics to be covered by the study.

The MAC appreciates the willingness of DG MARE to consider the integration of the suggested study in the work programme of EUMOFA.

2. Suggested scope

Considering the feedback received, the MAC believes that the topics should be prioritised in the following manner:

- a) In 2024, a study about “market trends, including new trends in direct human consumption (qualitative)”
 - Including a chapter on frozen and defrosted tuna in the intermediate (fish brokers) and final (HORECA and retail) segments

¹ <https://www.eumofa.eu/>

² <https://marketac.eu/eumofa-study-eu-tuna-sector/>

- Including a chapter on recent events
- b) In 2025, a study about production of raw material and trade flows

As previously suggested, the studies should focus on skipjack tuna (*Katsuwonus pelamis*), yellowfin tuna (*Thunnus albacares*) and bigeye tuna (*Thunnus obesus*). Furthermore, the studies should cover northern albacore (*Thunnus alalunga*).

If necessary, the MAC remains available for further exchanges with DG MARE representatives and with EUMOFA experts about the scope and priorities of the studies. To ensure the success of the studies, the MAC will encourage its members to be strongly involved, in particular to provide inputs and relevant contacts.