



## Advice

### **European Market Observatory for Fisheries and Aquaculture (EUMOFA): Suggestions of studies to be integrated in the Work Programme (2024)**

Brussels, 5 June 2024

#### **1. Background**

The European Market Observatory for Fisheries and Aquaculture (EUMOFA)<sup>1</sup> 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 line with previous practice<sup>2</sup>, in 2023, the Market Advisory Council (MAC) adopted advice with suggestions of studies to be conducted by EUMOFA<sup>3</sup>, including thematic analyses on sea bass and sprat, and studying other issues, namely the Russian invasion of Ukraine, data on fish caught through trawling methods, and selling methods at first sale and after first sale. Additionally, a study on the supply chain of the EU's tuna sector within the global tuna market was suggested<sup>4</sup>. DG MARE graciously accommodated these suggestions in the annual work programme.

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. Taking into account the development of a new work programme for EUMOFA, the MAC

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<sup>1</sup> <https://www.eumofa.eu/>

<sup>2</sup> In 2020, [advice](#) was adopted with suggestions of several topics to be addressed by EUMOFA. In 2022, [advice](#) was adopted suggesting a study on the challenges of aquaculture products in food outlets.

<sup>3</sup> <https://marketac.eu/mac-suggestions-of-studies-to-be-integrated-in-eumofa-work-programme-2023/>

<sup>4</sup> <https://marketac.eu/eumofa-study-on-eu-tuna-sector-priorities-scope/>

committed to provide new suggestions to DG MARE of topics for both price structure analyses and thematic analyses, which can potentially be undertaken by the experts under the next work programme.

## **2. Species profiles**

The website of EUMOFA has a section dedicated to species profiles<sup>5</sup>. These aim to provide the main market information and data along the supply chain on the most important species for the EU market. Commercial designations, species description and other qualitative information are reported, along with updated data on production (fishery and aquaculture), trade and consumption.

### **2.1. Rainbow trout**

EUMOFA provides a species profile for rainbow trout. Considering the importance of this species, the profile should be updated with the latest data on the different aspects from production to trade, processing, and markets.

## **3. Price Structure Analyses**

These analyses consist of an assessment of prices of a specific product along the different steps of the supply chain. EUMOFA publishes three to four of these analyses per year<sup>6</sup>.

### **3.1. Saithe**

A price structure analysis on saithe would be welcomed. In terms of geographical scope, the analysis should focus on France, Denmark, and Germany.

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<sup>5</sup> <https://eumofa.eu/the-eu-market>

<sup>6</sup> <https://eumofa.eu/en/market-analysis>

### 3.2. Clams

A price structure analysis on clams would be welcome. In terms of geographical scope, the analysis should focus on Italy, France, and Spain, the three main EU producers.

It is important to keep in mind that the worldwide seafood demand for bivalves continues to grow and that Clams, Cockles and Ark-shells represent 33% of the total production<sup>7</sup>.

The two main clam species cultured in the EU are Japanese carpet shell (*Ruditapes philippinarum*) and grooved carpet shell (*Ruditapes decussatus*). In 2020, European sales of these clams were almost 29 thousand tonnes. This production decreased compared to 2019 with -6% in volume, and -21% in value with a corresponding turnover of €183.2 million. The downward trends since 2017 is confirmed (41.9 thousand tonnes in 2017 vs 29.2 in 2020, -30%) (STECF Economic report on the EU aquaculture, 2022). The professionals are facing a decrease of natural spat and seed collection due to acidification of sea waters and salinity changes. Important milestones have been reached in 2020 to mitigate conflicts with other anthropic activities that are in the same coastal areas, especially in Emilia-Romagna (Italy).

Therefore, it would be relevant to analyse the structure of price to determine how the above-described negative trend is compensated or not in the prices.

## 4. Thematic Analyses

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

### 4.1. Evolution of EU consumers on consumption of fishery and aquaculture products

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<sup>7</sup> [FAO. 2021. FAO yearbook. Fishery and Aquaculture Statistics 2019/FAO annuaire and Global aquaculture production quantity \(1950-2020\)](#)

A study dedicated to the evolution of EU consumers on consumption of fishery and aquaculture products, including species, affordability, health consideration, sustainability, and labelling, and labelling would be welcomed. In terms of geographical scope, the focus could be on the Netherlands, Austria, and Greece, allowing for a balanced representation of Member States (North Sea-facing, landlocked, and Mediterranean, respectively). The main aim would be to analyse the evolution of consumption patterns against several aspects over a certain period of time, for example from 2014 to 2024, to better understand the behaviour of EU consumers and to better support positive changes.

## 5. EUMOFA Talks

Occasionally, EUMOFA organises events with panels of experts in an online format or at specialised, known as “EUMOFA Talks”. The MAC would like to suggest the following topics to be addressed in the future:

- Consumer uptake of sustainable fishery and aquaculture products
- Consumers’ interest and knowledge about sustainability in fishery and aquaculture products and the impact on their purchasing behaviour
- Sustainability ranking labelling of fishery and aquaculture products from a market perspective, including impacts along the supply chain
- Promotion of sustainable fishery and aquaculture markets and the encouragement of uptake of low-carbon products
- Challenges of aquaculture products in food outlets <sup>8</sup>
- Trends and drivers in consumption behaviour in the European Union

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<sup>8</sup> Once the study suggested in 2022 is published, it would be relevant to organise an event on the findings and recommendations.

## 6. Conclusion

In summary, the MAC believes that the European Commission should integrate the following topics in the 2024 edition of the work programme of EUMOFA:

- Species Profiles
  - Rainbow Trout (update)
- Price Structure Analyses
  - Saithe: France, Denmark, Germany
  - Mussels: Italy, France, Spain
- Thematic Analyses
  - Evolution of EU consumers on consumption of fishery and aquaculture products, including trends and drivers in the consumption behaviour
- EUMOFA Talks
  - Consumer uptake of sustainable fishery and aquaculture products
  - Consumers' interest and knowledge about sustainability in fishery and aquaculture products and the impact on their purchasing behaviour
  - Sustainability ranking labelling of fishery and aquaculture products from a market perspective, including impacts along the supply chain
  - Promotion of sustainable fishery and aquaculture markets and the encouragement of uptake of low-carbon products
  - Challenges of aquaculture products in food outlets
  - Trends and drivers in consumption behaviour in the European Union (e.g., convenience, age of the consumers), including possibilities for the supply chain to adapt