



EUROPEAN COMMISSION  
DIRECTORATE-GENERAL FOR MARITIME AFFAIRS AND FISHERIES

Maritime Policy and Blue Economy  
The Director-General

Brussels  
MARE.D3-A.4/PCO-CVW/ARES (2020)

Mr. Guus Pastoor,  
Chairman  
Market Advisory Council  
rue de la Science, 10  
B-1000 Brussels

**Subject: MAC Advice – Suggestion of case studies on price structure analyses by EUMOFA**

Dear Mr Pastoor,

I would like to thank the MAC for the detailed suggestions that were sent on 11 May 2020 on studies to be conducted by EUMOFA.

DG MARE and the EUMOFA experts have carefully assessed these suggestions. My intention is to integrate these studies in EUMOFA's 2020 and 2021 work programmes. However, in order to programme these studies adequately, we would need some additional clarifications on your requests as well as your view on our preliminary assessments and proposals.

In the appendix to this letter, you will find the details of our analysis and proposals. I invite you to provide us with your feedback at your best convenience. This can be done by sending this feedback directly by email to Laurène Jolly ([Laurene.Jolly@ec.europa.eu](mailto:Laurene.Jolly@ec.europa.eu)) and Christophe Vande Weyer ([Christophe.Vande-Weyer@ec.europa.eu](mailto:Christophe.Vande-Weyer@ec.europa.eu)) from the Market unit (MARE/A4).

It may also be that new needs emerge as a consequence of the Covid-19 pandemic. In that case, you may wish to consider complementing the list of studies proposed and, if necessary, we would consider reordering priorities, in consultation with you.

Once all clarifications are received and we have a common understanding on the studies the MAC could consider useful, we could reshape EUMOFA's work programme and implement it without delay.

Looking forward to receiving your feedback on our analysis, I wish to thank you for your commitment and valuable input. Should you have any question on this letter, I invite you to take contact with Ms Pascale Colson, coordinator of the ACs ([Pascale.Colson@ec.europa.eu](mailto:Pascale.Colson@ec.europa.eu); +32 2 29 56273).

Yours sincerely,

Charlina VITCHEVA

Annex: Preliminary assessment of proposed studies



## Annex: preliminary assessment of studies

Recommended studies	Type of studies	Assessment and clarifications requested
<p><i>In relation to the production of <b>mussels, oysters, and clams</b> by the European shellfish farming sector, if possible according to market sizes, production costs for companies, sales prices and margins (between producers, purifiers, wholesalers and various points of sale, such as fishmongers, restaurants, and supermarkets), and direct sales by producers to consumers.</i></p>	<p>3 Price structure analyses</p>	<p>Price structure analysis on mussel: already carried-out, released in July 2019 (see <a href="#">Fresh mussel in the EU: focus on Denmark, Germany and Italy</a>)</p> <p>⇒ <b>Does the MAC consider this study sufficient?</b></p> <p>Price structure analyses on clam and oyster</p> <p>⇒ <b>The MAC is asked to specify the Member States on which the studies should focus (generally up to 3 MS per study)</b></p> <p>Timing: 3 studies are to be carried-out in 2020: prepared haddock fillet, canned mackerel, frozen cod fillet.</p> <p>⇒ <b>The MAC is asked to choose between either carrying-out both studies afterwards (from 2021), or substituting them to some of the studies planned in order to initiate them earlier.</b></p>
<p><i>Trends in canned fish and <b>shellfish</b> consumption in European markets, including the causes of changes in consumption levels and price, particularly <b>tuna, sardines, sprats, mackerel, anchovies, salmon, brislings, and herring.</b></i></p>	<p>9 thematic analyses (1 for the “shellfish” group + 8 for the different products listed)</p>	<p>Timing and depth: studies can be limited to the provision of raw data on consumption, or consist in in-depth and thorough analyses. In the first case, all data-sets could be provided in 2020. In the second, EUMOFA can carry-out 3 thematic analyses a year, starting from 2021.</p> <p>⇒ <b>The MAC is asked to specify the nature of the thematic studies (comprehensive data-sets of in-depth analyses).</b></p> <p>The geographical scope of the analyses should be specified for each product: it can not be envisaged to develop in-depth analyses for all European markets in</p>

Recommended studies	Type of studies	Assessment and clarifications requested
<i>The supply chains, in all of the European Union, of <b>seabream, portion trout, large trout, and meagre.</b></i>	4 Price structure analyses (2 already developed + 2 to launch)	<p>the framework of EUMOFA’s activities, nor does it bring substantially more lessons than a well-targeted selection of countries.</p> <p>⇒ <b>The MAC is asked to specify the Member States on which the studies should focus (generally up to 3 MS per study)</b></p> <p>Price structure analyses on seabream and on portion trout: these were already developed and released in October 2017 (see “<a href="#">Gilthead seabream in Italy</a>”) and December 2017 (see “<a href="#">Fresh portion trout in Poland</a>”).</p> <p>⇒ <b>Does the MAC consider these studies sufficient?</b></p> <p>Price structure analysis on large trout: being for smoking mainly, the outcome of this study could be comparable to some extent to the price structure analysis on smoked salmon developed and released in September 2016 (see “<a href="#">Smoked salmon in France</a>”);</p> <p>⇒ <b>Does the MAC consider this study sufficient?</b></p> <p>Price structure analysis on meagre (and large trout if deemed necessary): conducting a study on meagre could be very challenging, as data can be difficult to collect due to the small production at EU level.</p> <p>⇒ <b>The MAC is asked to specify the Member States on which the study(ies) should focus (generally up to 3 MS per study – see comment above on geographical scope).</b></p> <p>Timing: Depending on the choice made above on the clam and oyster studies, it could be possible to initiate it or one in 2020.</p> <p>⇒ <b>The MAC is asked to provide its preference concerning the timing of</b></p>

Recommended studies	Type of studies	Assessment and clarifications requested requested studies.
<p><i>The MAC further recommends an update of previous case studies on price structure analysis, particularly the EUMOFA study “The <b>caviar</b> market. Production, trade and consumption in and outside the EU”, with the newest available data, since the sector regards this study as considerably valuable. This study should be expanded to include the <b>sturgeon</b> market as well as the <b>caviar analogues market</b>, such as lump eggs, salmon and trout eggs.</i></p>	<p>3 thematic analyses (1 update for caviar + 2 for sturgeon and caviar analogues market)</p>	<p>It is proposed to split this request in two tasks:</p> <ol style="list-style-type: none"> <li>1) Update of the caviar study: focus on the update of the data reported in the study conducted in November 2018.</li> <li>2) Carry-out ad-hoc Studies on sturgeon and caviar analogues markets: EUMOFA does not monitor production/consumption of these products, therefore these studies may require significant time and efforts (i.e. as was the case for the 2018 caviar study).</li> </ol> <p>⇒ <b>The MAC is asked to validate this approach in 2 steps;</b></p> <p>⇒ <b>The MAC is asked to specify objectives and expectations (expected levels of details) related to the studies on sturgeon and caviar analogues market.</b></p>