



## MAC ADVICE

### Clarifications on MAC Advice on EUMOFA Case Studies

Brussels, 10 September 2020

#### 1. Introduction

On 11 May 2020, the Market Advisory Council (MAC) adopted an advice to the European Commission with suggestions of studies to be conducted by EUMOFA<sup>1</sup>. The suggestions were essentially on: the production of mussels, oysters, clams (European shellfish farming sector); tuna, sardines, sprats, mackerel, anchovies, salmon, brislings, herring (trends in canned seafood); seabream, portion trout, large trout, meagre (European supply chains); and caviar, sturgeon, caviar analogues.

On 11 June 2020, DG MARE provided a reply, which expresses their intention to integrate these studies in EUMOFA's 2020 and 2021 work programmes. However, in order to programme these studies adequately, DG MARE needs some additional clarifications on the requests as well as the MAC's view on their preliminary assessments and proposals<sup>2</sup>.

The MAC would like to thank DG MARE and the EUMOFA experts for their receptiveness to the suggestions presented and for their detailed analysis and proposals. Below, the requested additional clarifications on the requests are made available, in line with the preliminary assessment of studies by the Commission services.

Lastly, the MAC would like to suggest the development of a framework with the Commission services to facilitate the annual presentation of the EUMOFA's work programmes and the submission of suggestions for the consideration of DG MARE and the EUMOFA experts.

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<sup>1</sup> MAC Advice on "Suggestions of case studies on price structure analysis via EUMOFA" available here: <https://marketac.eu/wp-content/uploads/2020/05/MAC-Advice-EUMOFA-Case-Studies-11.05.2020-1.pdf>

<sup>2</sup> The European Commission's reply is available here: <https://marketac.eu/wp-content/uploads/2020/06/MAC-recommendations-on-Eumofa-110520-reply-DG-MARE.pdf>

## **2. COVID-19 Impact**

In the original advice, the MAC drew attention to the need for specific studies to assess the significant impact of the COVID-19 pandemic on the entire seafood supply chain. The Commission services has made known that EUMOFA will be one of the tools used to assess this crisis.

As such, as a topic to be prioritised in the assessments of COVID-19's impact, the MAC suggests the shift from out-of-home consumption to in-home consumption and its effect on the European seafood industry as well as the shift from fresh and chilled products to frozen and processed products.

The MAC also suggests the development of an impact analysis on the market implications of the COVID-19 pandemic for small-scale fisheries.

In relation to fish farmed species, the MAC highlights the importance of analysing the impact on turbot and caviar, since these two products are mainly distributed by the HORECA sector.

Additionally, the value and volume of Brown Crab (*Cancer pagurus*) has increased considerably since the most recent EUMOFA analysis (2017). Much of the growth in this fishery is due to growth in demand for live product in China and other Asian countries. This trade is highly dependent on air freight and the operators concerned have developed very effective handling methods to ensure live brown crab can be sent from the furthest boundaries of the EU to China not only alive but with a substantial shelf life. This industry has been heavily impacted by COVID-19 pandemic. Therefore, the MAC suggests the undertaking of an in-depth analysis of this supply chain and the evaluation of mitigation measures to develop a strategy to cope with such global catastrophe in the future. Other live crustacean and mollusc species with similar supply chains could benefit from such a study and report.

## **3. Production of mussels, oysters and clams – Price Structure Analyses**

The MAC does not believe the study on price structure analysis on mussel “Fresh mussel in the EU: focus on Denmark, Germany and Italy” (July 2019) to be sufficient.

For farmed mussels, the MAC suggests a focus on rope-grown mussels in Italy, Spain, Ireland and France, through an in-depth analysis of production costs and prices in each of the following

channels: direct sales by the producer, sales by fishmongers, sales by supermarkets, and sales by restaurants.

For cultivated oysters, the MAC suggests a study focused in France, Ireland, and the Netherlands that analyses the four marketing channels mentioned above.

#### **4. Trends in canned fish and shellfish consumption, particularly tuna, sardines, sprats, mackerel, anchovies, salmon, brislings and herring – Thematic Analyses**

The MAC does not believe that the provision, in 2020, of raw data sets on consumption, would be sufficient. The MAC proposes the following topics for the 3 in-depth thematic analyses to be conducted in 2021: Herring, Tuna, and Sprats.

As for the geographical scope of the mentioned analyses, regarding “Herring”, the MAC suggests a focus on Germany, Sweden, Poland and the Netherlands. Concerning “Tuna”, the focus should be on Spain, Italy and France. As for “Sprats”, the focus should be on Sweden, Denmark and Poland.

#### **5. Seabream, portion trout, large trout, meagre supply chains – Price Structure Analyses**

The MAC does not believe the price structure analysis on “Gilthead Seabream in Italy” (October 2017) to be sufficient. In terms of geographical scope, a seabream analyses should focus on Spain, France and Germany.

The MAC does not believe the price structure analysis on “Fresh Portion Trout in Poland” (December 2017) to be sufficient. In terms of geographical scope, a portion trout analysis should focus on Italy, Germany and Poland.

In terms of geographical scope, for the large trout analysis, it should focus on Italy and Spain. A meagre analysis should focus on Spain, Italy and Greece. The MAC suggests that the analysis used for the study “Smoked Salmon in France” (September 2016) could be used as a structure for these two reports.

These studies should be carried out, as far as possible, in 2020, in substitution of the planned studies.

## **6. Caviar market, sturgeon and analogues – Thematic Analysis**

The MAC agrees with an update of the caviar study (November 2018) and 2 thematic analyses for sturgeon and caviar analogues.

In relation to the sturgeon analysis, the objective would be a study on the sturgeon meat market as detailed as the caviar study, while taking into account the evolution of the market since November 2018. As for caviar analogues, a study focused on salmon eggs (roes) and trout eggs would be an important tool for European fish farmers.

## **7. Conclusion**

In summary, the MAC suggests the undertaking of the following studies:

- Covid-19 Impact
  - Shift from out-of-home consumption to in-home consumption
  - Shift from fresh and chilled products to frozen and processed products
  - Market impact analysis on small-scale fisheries
  - Fish farmed species: turbot and caviar
  - Brown Crab
- Production of mussels, oysters and clams (Price Structure Analyses)
  - Rope-grown mussels: Italy, Spain, Ireland, France
  - Cultivated oysters: France, Ireland, the Netherlands
- Trends in canned fish and shellfish consumption (Thematic Analyses)
  - Herring: Germany, Sweden, Poland, the Netherlands
  - Tuna: Spain, Italy, France
  - Sprats: Sweden, Denmark, Poland
- Seabream, portion trout, large trout, meagre supply (Price Structure Analyses in 2020)
  - Seabream: Spain, France, Germany
  - Portion Trout: Italy, Germany, Poland
  - Large Trout: Italy, Spain
  - Meagre: Spain, Italy, Greece



- Caviar market, sturgeon and analogues (Thematic Analysis)
  - Caviar: Update of the 2018 study
  - Sturgeon: Undertaking of study as detailed as the caviar one
  - Caviar analogues: Salmon eggs (roes) and trout eggs

The MAC remains available to provide clarifications and suggestions on potential EUMOFA studies and looks forward to continuous cooperation with the Commission services and the EUMOFA experts.