



EUMOFA study: Impact of seafood imports on the EU Small-Scale Coastal Fleet

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MARKET ADVISORY COUNCIL MEETINGS
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Objective of the study

To better understand the functioning of supply chains and markets for the EU small-scale coastal fleet (SSCF) and to analyse potential market interaction with seafood imports.

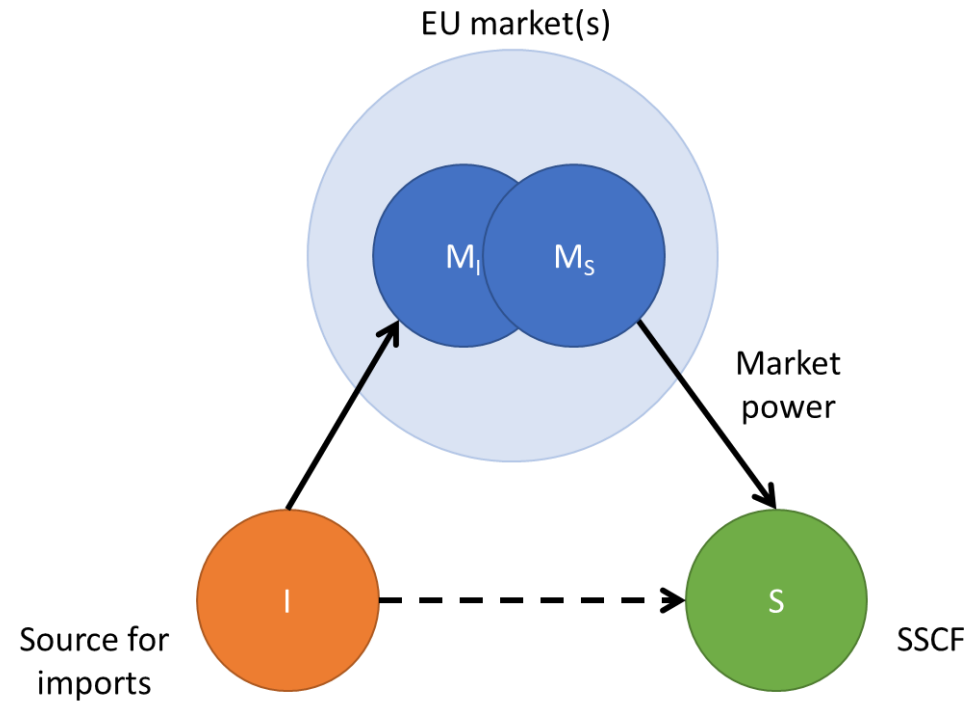
In details:

1. identify and describe the SSCF and the markets it supplies, for each EU MS.
2. identify and describe the import of seafood and the markets these products supplies, for each EU MS.
3. Identify and analyse the sourcing strategies used by actors in fishery supply chains (e.g. retailers, fishmongers, wholesalers), particularly those sourcing products from the EU SSCF.
4. Based on this information, investigate the observed and potential impact of seafood imports on the EU SSCF.
5. Identify communities or regions that are most impacted by imports due to a high dependency or interaction with the local fishing fleet.

Some definitions

- Small-scale coastal fisheries:
Fishing vessels of an overall length of less than 12 metres and not using towed fishing gear
- Extra-EU trade:
Products originating from non-EU countries sold in the EU, including those landed in the EU from vessels flagged by non-EU countries
- Market integration:
The extent to which prices in different markets are interrelated
- Market power:
Which actor (e.g. producer, consumer) is determining the price for another actor

Model of import competition as a combination of market integration and market power



Conditions of impact:

1. M_I and M_S are integrated
2. M_S is the price maker to S and I is the price marker to M_I

There is a likely impact of imports as I is the price maker to S through an integrated M.

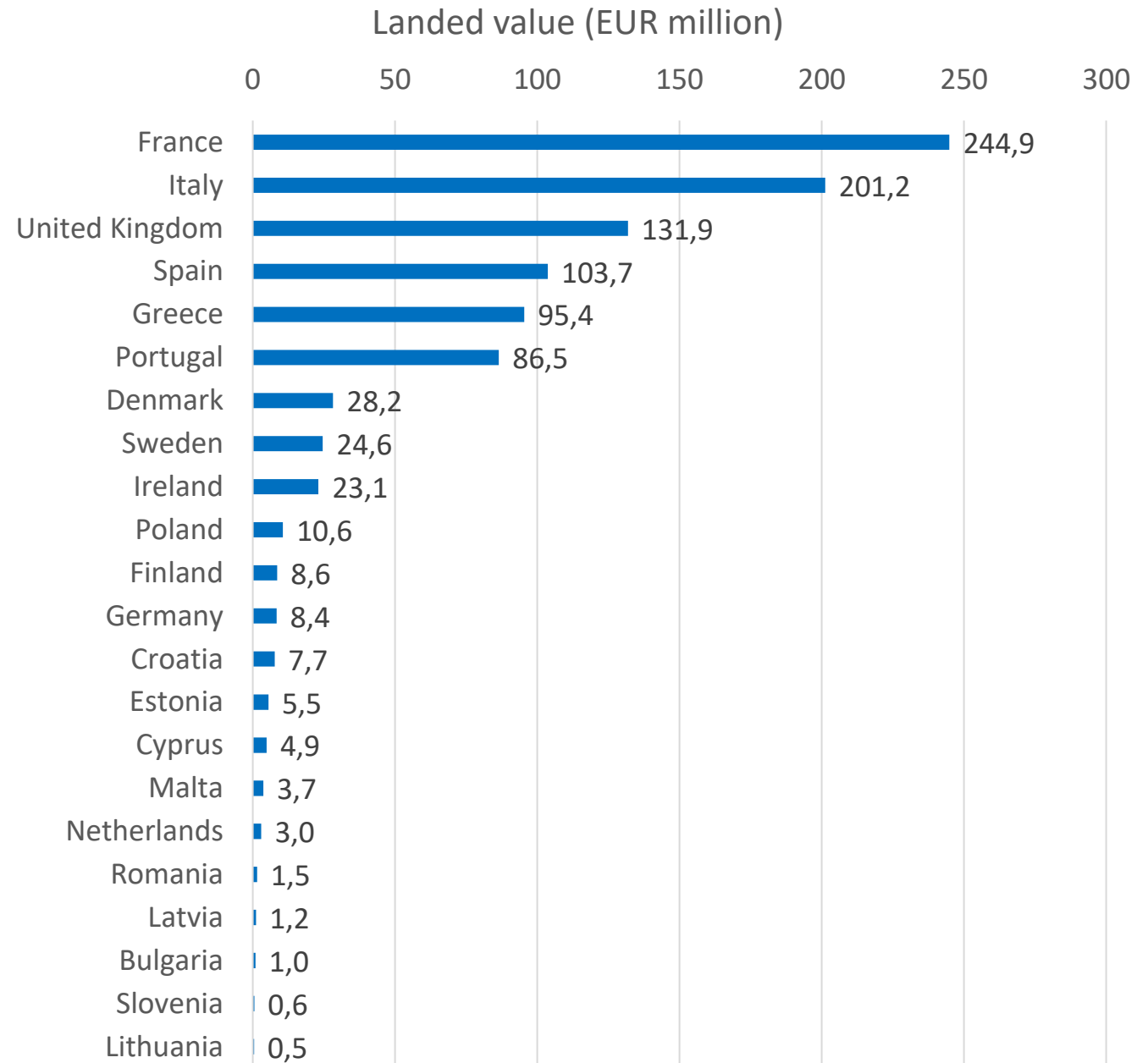
Value landed on average by SSCF

Average landed value reported between 2015 and 2018

Total landings: 996,7 millions EUR

Top 6 countries: 863,6 millions EUR

⇒ Top 6 MS represent 87% of the value landed by SSCF vessels.

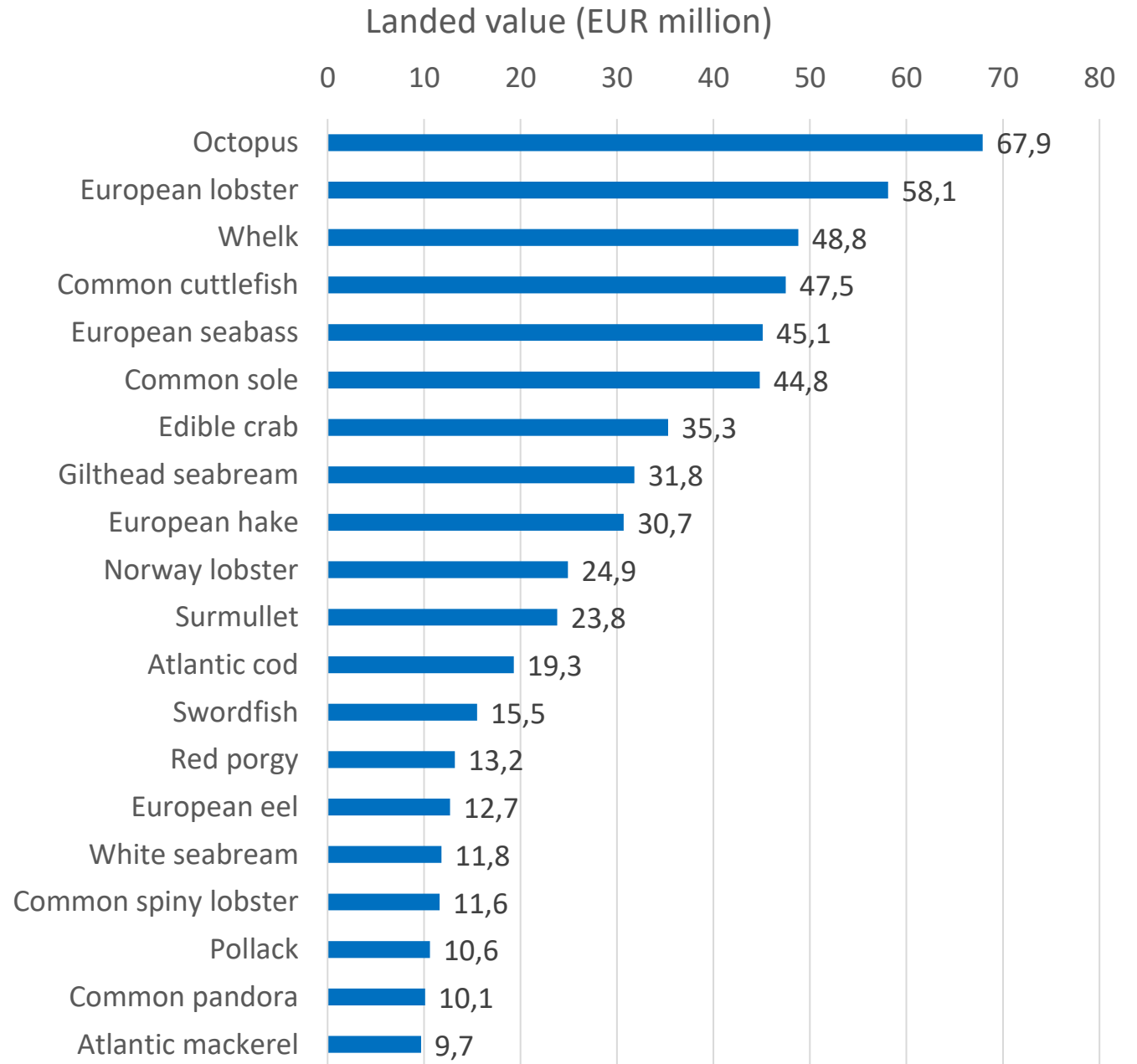


Top SSCF species

Average landed value reported between 2015 and 2018

Top 20 species: 573,2 millions EUR

⇒ Top 20 represent 87% of the value landed by SSCF vessels.



Three case studies

- Cod caught in Sweden competing with Norwegian cod
- Octopus caught in Spain (Galicia) competing with octopus caught in Portugal but also in Northern Africa
- Lobster in France competing with lobster from Northern America (Canada, USA) and Europe (UK, Ireland)

Focus on the lobster case study

Homarus gammarus - *Homarus americanus*

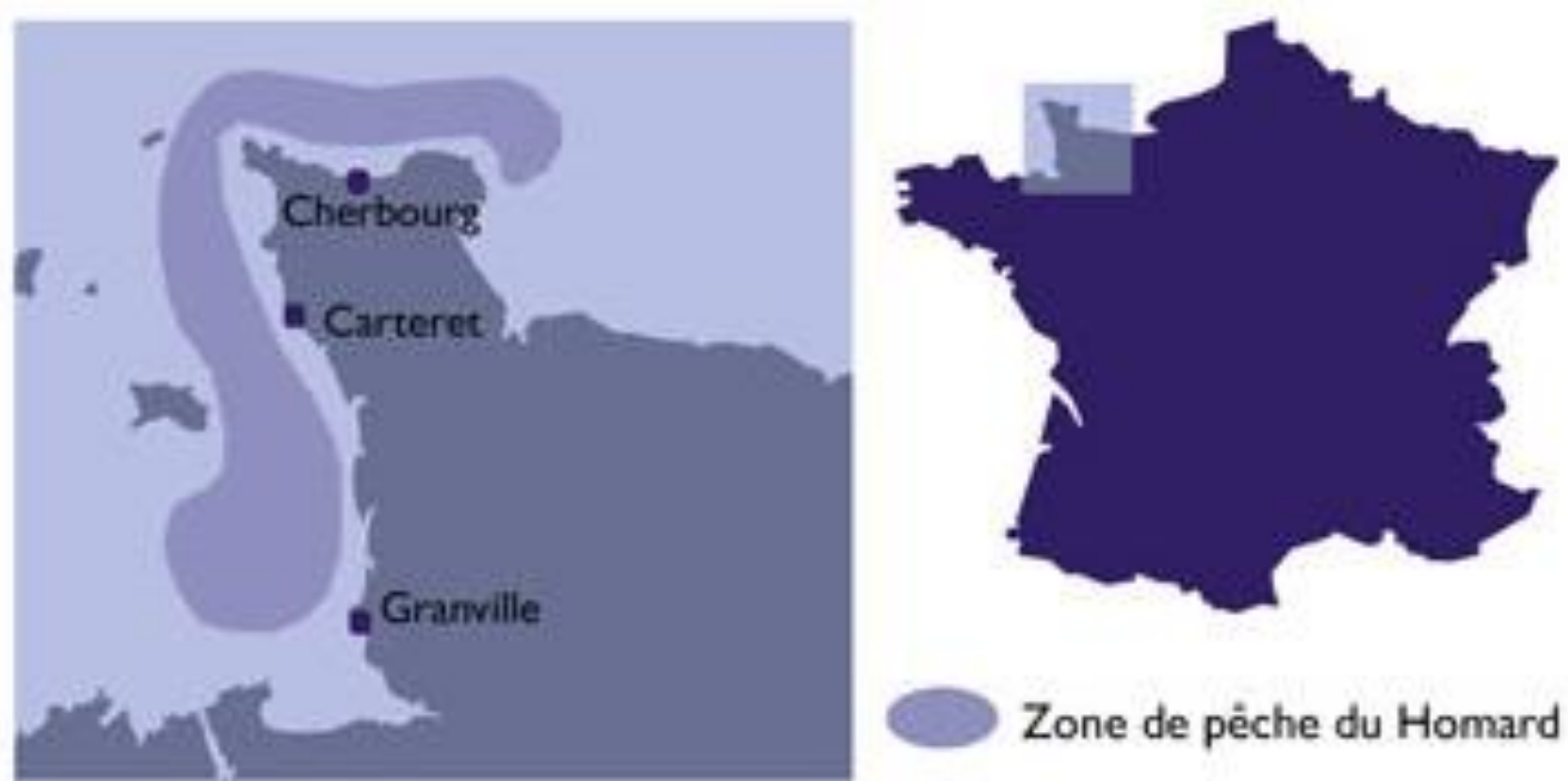
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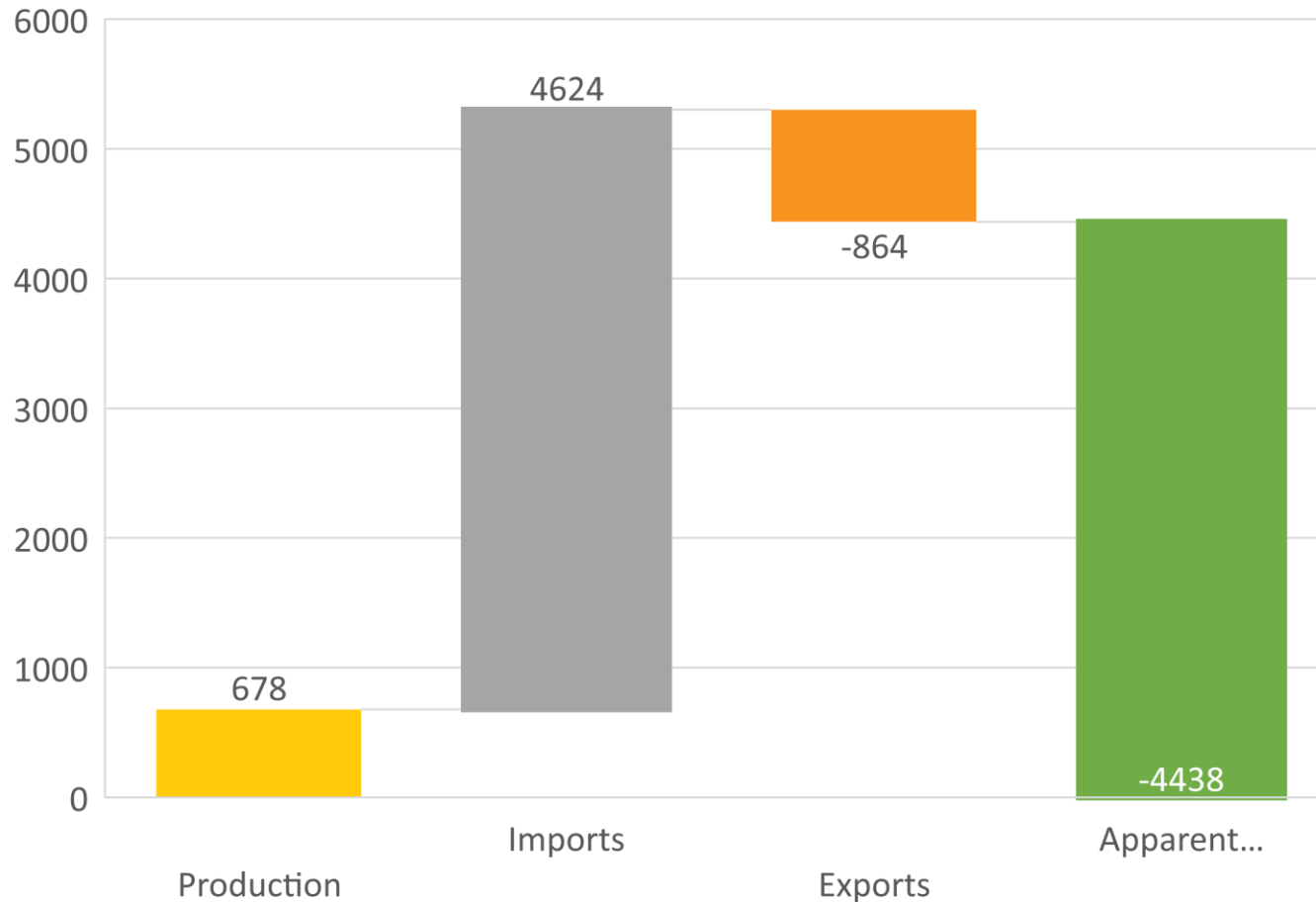
Focus on the lobster case study

Fishing grounds in Normandie



Focus on the lobster case study

The French lobster market in 2018



Production:

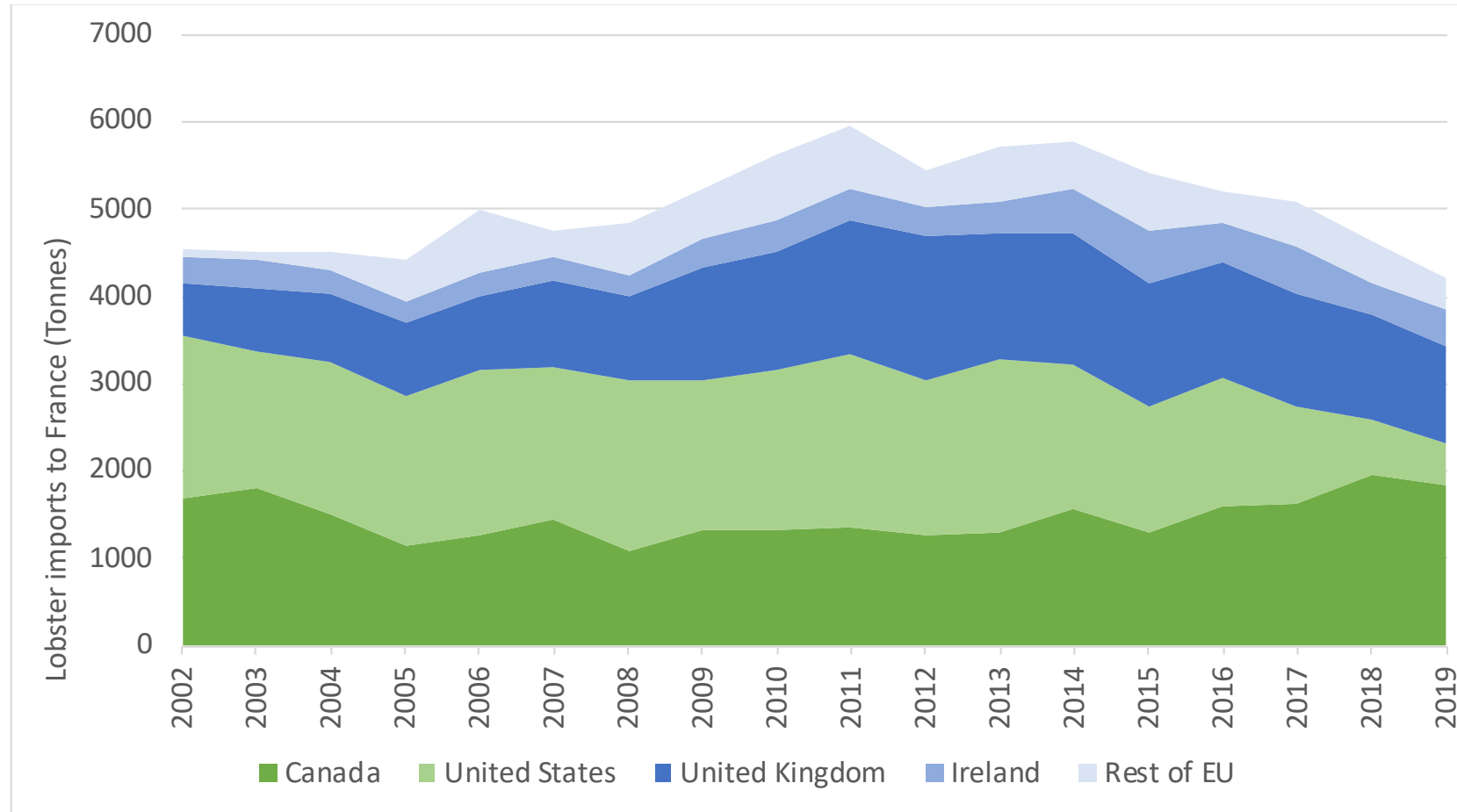
- Essential SSCF vessels
- Some of the production is ecolabelled (MSC)

Imports:

- Mostly live/fresh lobster (70%)
- Four countries represent 90% of the quantities imported:
 - Canada
 - United Kingdom
 - USA
 - Ireland
- Imports are fresh and frozen

Focus on the lobster case study

Lobster imports to France



Summary of findings

Market	Market integration	Market position
Cod in southern Sweden	Moderately	Price taker
Lobster in northern France	Moderately	Price maker
Octopus in northern Spain	Loosely	Price maker
Cuttlefish in eastern Italy	Loosely	Neither
Seabass in north-western France	Loosely	Price maker
Gilthead seabream in western France	Not	Price maker
Sole in western France	Loosely	Price maker
Perch in Estonia	Moderately	Neither
Lobster in the UK	Moderately	Price taker
Lobster in south-eastern Ireland	Loosely	Price taker
Octopus in central Portugal	Loosely	Price taker*
Cuttlefish in central Portugal	Loosely	Price maker
Black seabream in central Portugal	Not	Price maker*
Seabass in central Portugal	Not	Price maker*



Summary of findings - II

- Imports sometimes *an* issue but never the *only* issue and never even the *biggest* issue
- Many strategies to create a niche for SSCF products
- Broader issues of SSCF economic power
- May still be scope for impactful policies, institutions and SSCF market strategies