



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR MARITIME AFFAIRS AND FISHERIES

The Director-General

Brussels,
MARE/A4/LJ (2023)

Subject: MAC Advice – Suggestion of study on the challenges of aquaculture products in food outlets

Dear Ms. Bermúdez,

Let me come back to your request of a study on the challenges of aquaculture products, to which we answered on 25 November 2022 ⁽¹⁾.

DG MARE and the European Observatory for Fisheries and Aquaculture Markets (EUMOFA) assessed your suggestion of having a study on the challenges of aquaculture products in food outlets, and to integrate it into EUMOFA work programme for 2023. We have the pleasure to let you know that the assessment concluded that the study is feasible **with some adjustments and clarifications to be provided by MAC**. Once all clarifications are provided and a common understanding on the scope of the study is in place, we will adapt EUMOFA's work programme to integrate the study and implement it without delay.

I would like to draw your attention to the fact that this work will only be a success with a strong involvement of the MAC and its members, in particular to provide inputs during the design of the study and the field work. Annexed to this letter, you will find the details of our assessment and proposal. Should MAC confirm its interest for this study, I invite you to contact DG MARE to organize a meeting to discuss the proposal ⁽²⁾.

⁽¹⁾ See Ares(2022)81751689

⁽²⁾ This can be achieved through exchanges of e-mails with Laurène Jolly (Laurene.Jolly@ec.europa.eu) and Christophe Vande Weyer (Christophe.Vande-Weyer@ec.europa.eu) from the Market unit (MARE/A4).

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I am looking forward to our continued fruitful cooperation. Should you have any further questions on this reply, please contact the functional mailbox of the Advisory Councils MARE-AC@ec.europa.eu, who will forward them to relevant colleagues.

Yours sincerely,

Charlina VITCHEVA

Enclosure: Proposed methodology

c.c.: Pedro Reis Santos secretary@marketac.eu

Annex: Proposed methodology

1. General approach

Our approach is considering the following aspects:

- Several sources of information are already available on the aquaculture sector at EU level. This study should build on this information. Main sources are:
 - o EUROSTAT (also disseminated by EUMOFA): volume and value of production, trade by species / group of species,
 - o STECF: quantitative and qualitative analysis on the aquaculture sector at MS and species levels,
 - o EMODNET: location of aquaculture sites,
 - o EUMOFA reports (e.g Recirculating aquaculture study, Organic aquaculture study, Freshwater aquaculture study, Online sales of Fisheries an Aquaculture products, Price transmission analysis)
 - o Other sources at national level.
- The situation of farmed product is highly different from one species and one MS to another, thus a differentiated approach should be implemented in order to allocate the means where it is the most relevant and where data are missing.

Considering the extensive scope of the study, and the different situations from one species and one MS to another, we propose to focus on a selection of species in some MS. The proposed selection is provided in the table below. This selection may be updated at the beginning of the study based on the results of qualitative interviews with MAC and the main national organisations for farmed products (see next section).

	Main EU sectors for aquaculture products								Existing sources from EUMOFA
	Atlantic and Mediterranean				Central EU			Northern EU	
	ES	FR	IT	EL	PL	CZ	HU	DK	
Mussel	x								Price structure analysis in ES, FR, IT (2022)
Oyster		x							Price structure analysis in FR (2022)
Carp					x	x			Freshwater aquaculture study (2021) Price structure analysis on carp in Central EU (2016)
Trout		x	x						Freshwater aquaculture study (2021) Price structure analysis: Portion trout in IT, PL, DE (2021), large size trout in IT, ES (in progress)
Seabass / seabream	x			x					Price structure analysis: seabass in EL, HR, ES (2019)

										Price structure analysis seabream in ES, DE, FR (2022) Price structure analysis: seabream in IT (2014)
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2. Tasks to be performed

We propose to develop the study through 1) interview with the MAC and the main national bodies to better understand the study scope, 2) desk research and analysis with the available information and 2) field work where there are gaps.

In more details, we propose the following steps for the study:

- Task 1 - Structuring of the study:
 - Interviews with the MAC and main national organisations on farmed products
 - Identification of the sources
 - Fine-tuning of the scope and the methodology
 - Elaboration of the data collection tools
- Task 2 - Desk analysis at EU and MS levels:
 - Statistical analysis at EU 27 level
 - Desk analysis for the selection of species and MS (see table above) based on the existing literature
- Task 3 - Field work
 - Elaboration of the data collection strategy for field work, based on gaps from desk analysis,
 - Identification of stakeholders to interview:
 - producer organisations (national, regional),
 - producers,
 - wholesalers,
 - processors,
 - retailers.
- Task 4 - Analysis / writing of the report, for each study theme
- Task 5 - Finalising of the study: peer-review, addressing comments from DG MARE, editing and possible translations of the summary

3. Proposed study questions for the selection of species and MS

- Enterprises operating the market:
 - How many companies and sites are active in the aquaculture production?
 - What is the average size (or distribution of size) of farms (estimates or qualitative information)?
 - What are the production methods implemented?
 - What is the organisation of the value chain for downstream stages (wholesale, processing): type and estimated numbers of stakeholders?
 - What are the products sold at the different stages of the value chain (presentation and preservation)?
- Geographical balance and mapping of the distribution circuits, particularly difficulties in reaching rural areas (vs concentration in littoral areas and large metropolitan centres)

- Where are these production sites located?
- What are the sales channels (estimates)?
- What is the balance between: littoral, urban and rural areas (estimates)?
- Complementary of direct sales and online sales in relation to traditional sales to retailers
 - What is the importance of direct sales and online sales for the main species?
 - To what extent these sales channels are complementary to other channels in the producer strategies?
- Current difficulties in the implementation of new outlets (e.g., packaging requirements, refusal from postal carriers to transport packages with water)
 - What are the difficulties met by stakeholders (at the different stages of the value chain) to place new outlets on the market? This topic is directly related to:
 - Size of companies and methods of production
 - the innovation in farmed fish sector and the capacity of investment of stakeholders for research, development and marketing,
 - the strategies of the stakeholders at the different stages of the value chain,
 - the market trends and competition on the market, with wild caught and imported fish.
 - The organisation of the sector (e.g. collective bodies)
- Benefits of quality labels, geographical indications, and promotion tools in relation to the full development of the market
 - What are the benefits of schemes on the market to access outlets (organic, geographical indications, private certifications and other national schemes)?
 - What are the impacts on consumer perception for these schemes?
 - Are there other relevant promotion tools?
- Trends and perspectives
 - What are the trends on the past year for the sales of farmed products,
 - What are the prospects for the coming years? What are the key factors influencing the development of farmed product sales (scenarios)?

4. Time schedule

The following table provides a proposed time schedule for the study (detail by month as of the preliminary meeting with the MAC).

	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10
Task 1 – Structuring	x	x								
Task 2 – Desk research		x	x	x	X					
Task 3 – Field work					x	x	x			
Task 4 - Analysis / reporting							x	x	x	
Task 5 - Finalisation										x