



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR MARITIME AFFAIRS AND FISHERIES

Maritime Policy and Blue Economy
The Director-General

Brussels
MARE.A.4/LJ

Subject: MAC Advice on European Market Observatory for Fisheries and Aquaculture (EUMOFA): Suggestions of studies to be integrated in the Work Programme (2023)

Dear Ms. Bermúdez,

I would like to thank the MAC for the detailed suggestions that were sent on 3 February 2023 on studies to be integrated in EUMOFA work programme.

DG MARE and the EUMOFA experts have assessed the proposals and their feasibility. You will find bellow our proposed approach to integrate these studies in EUMOFA's 2023-2024 work programme:

1. Seabass

A study on this species will be developed in 2023, in the form of a price structure analysis with a focus on Spain, Greece and Italy. It will be an update of the one published in 2018 (which had a focus on Spain, Greece and Croatia).

2. Sprat

A study on this species will be developed, in the form of a price structure analysis in 2023 with a focus on Sweden, Denmark and Poland, and will cover products other than cans, as proposed by the MAC. In addition, a new species profile will be developed in late 2023.

3. Russian invasion of Ukraine

It is suggested to conduct a study on the evolution of the EU market and its disruptions over the last couple of years. The objective is to put into perspective the global macro-economic context and the trends on the FAPs market. The focus will be on the analysis of trade flows between the EU and the rest of the world and the evolution of prices along the supply chain. This study will be planned for late 2023.

4. Data on fish caught through trawling methods

To cover market-related aspects of fishing methods, it is first needed to know the share of products on the EU market from each fishing method. Such an assessment can only rely

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on assumptions, as there is no sufficient data available, in particular for imports. EUMOFA will initiate this work by mid-2023. On the basis of these estimates, we will assess further the feasibility of market analyses for some specific fishing methods.

5. Selling methods at first sale and after first sale

The scope of the study requested by the MAC is too wide and would require some clarifications. A study on online sales, covering B2C sales, was already published in 2021 and it is considered a bit premature to update it. The new analysis could focus on the digitalisation of selling methods, in particular at first sale, both for fishery and aquaculture products. The work could investigate the consequences of the development of these new selling methods (e.g. digital auctions) on the market. This study could be carried-out in 2024.

I would like to draw your attention to the fact that these studies 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 studies and the field work. For that reason, if the MAC confirms its interest in these studies and the approach proposed, I invite you to contact DG MARE to discuss the proposal (Laurène Jolly (Laurene.Jolly@ec.europa.eu) and Christophe Vande Weyer (Christophe.Vande-Weyer@ec.europa.eu) from the Market unit (MARE/A4)).

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 at MARE-AC@ec.europa.eu.

Yours sincerely,

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