



Brussels  
MARE.A.4/LJ

**Subject: MAC Advice on European Market Observatory for Fisheries and Aquaculture (EUMOFA): Price structure analysis of the supply chain of EU tuna sector within the global tuna market**

Dear Ms. Bermúdez,

I would like to thank the MAC for the detailed advice sent regarding a study to be integrated in the EUMOFA work programme.

DG MARE and the EUMOFA experts have assessed the proposal and its feasibility. It appears that the request of the MAC is too large to be integrated as such in EUMOFA's 2024 work programme and would need to be streamlined. Moreover, topics and number of Member States to be covered go beyond the methodology used for price transmission analysis done by EUMOFA.

For these reasons, we suggest to the MAC to narrow the scope of the request and to prioritise among the different topics to be covered by this study, notably:

- Production of raw material: global and EU volumes of production, certification schemes and RFMOs production,
- Trade flow analysis: analysis of imports and exports of tuna raw material from extra EU countries, volumes under ATQs,
- Market trends, including new trends in direct human consumption (qualitative)
- “Defrosted” tuna market in the EU: qualitative analysis of market and trends
- Impact of the recent crisis on the EU tuna market

Some aspects mentioned in the initial request are not feasible due to lack of data and available information (e.g. state of the product at landings, re-export data, direct sourcing of EU canneries from EU flagged vessels, quantitative analysis of defrosted market).

In addition, let me underline that the assessment of impacts on the tuna market of EU legislation, as you are suggesting (e.g. SFPAs, ATQs, subsidies, sanitary controls, labour rules, IUU) falls outside the scope of EUMOFA. Such analyses are conducted in the context of the evaluation of the relevant policy framework.

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I would like to draw your attention to the fact that this study would only be a success with a strong involvement of the MAC and its members, in particular to provide inputs and relevant contacts during the design of the studies.

Should you have any questions on this reply, please contact Mr Vincent GUERRE, coordinator for the Advisory Councils (Vincent.GUERRE1@ec.europa.eu; +32 229-57432).

Yours sincerely,

Charlina VITCHEVA

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