



Study on the digitalisation at first sale stage

Market advisory council – Working Group 1: EU Production – 02/12/2025



Tanguy CHEVER, Rose CAHAGNE
EUMOFA Team

Introduction

- The European market observatory for fisheries and aquaculture products (**EUMOFA**) is an EU initiative (DG MARE) www.eumofa.eu
- Digitalisation at first sale stage
 - Scope : landing forecasts + digitalised sales
 - Desk research and interviews in NL, BE, DK, FR, ES, IT



1. State of play of digitalisation

Several IT systems identified

IT system	Countries	Landing forecast	First sales
Auxcis (KOSMOS)	BE, NL, FR, ES		X
EFICE	NL	X	X
PEFA	NL, DK, SE, IT	X	X
Agisoft	FR		X
MercaPesca	ES, FR, PT		X
AlphaFish	IT		X
Go Infoteam (e Fish)	IT		X

Landing forecasts – information available depends on the size of the vessel

- Vessels > 12m: mandatory ERS → Electronic logbooks
 - Data shared in real time with POs or directly with auctions (aggregated) or
 - Extrapolation based on 1st days of fishing trip
- Vessels < 12m:
 - Text messages to POs/auctions
 - No forecast, data shared with auction upon landings

Landing forecasts – Access of the information for buyers

- From Whatsapp groups to fully integrated systems:
 - Online in real-time for auctions with integrated systems (BE, DK, NL, sometimes in FR)
 - By text message / Whatsapp group (some auctions in FR, ES, and IT)
- No forecast available in some auctions in FR, IT, ES

Digitalised auctions – State of play

- Heterogeneity between MS and within MS
- From non-digitalised auctions to fully integrated systems:
 - Digitalisation and interconnection : DK, NL, BE some auctions in FR and ES
 - Digitalisation only : some auctions in FR, ES, IT
 - No digitalisation : some auctions in ES and IT

Example of PEFA

- Dutch system, launched in 2008
- 6 auctions in NL, some in DK, SE and IT
- Landing forecasts (24h before landings)
- Digitalised and interconnected first sales: ~ 250 buyers connected to PEFA
- Data shared: species, volume, vessels, picture, grade

Example of Brittany region (FR)

- Regional system for landing forecasts: « Breizh'Apport »
 - Vessel above 12 meters (electronic logbooks)
 - Catches aggregated by POs and shared to auctions
- Heterogeneity in digitalisation of first sales:
 - Digitalised and interconnected (Cornouaille): 6 auctions → Kosmos system (Auxcis)
 - Digitalised only: 6 auctions, tailored systems by Auxcis

Example of Spain

- No national/regional system for landing forecasts: some auctions use KOSMOS system or Whatsapp groups
- Digitalised first sales:
 - Digital internal systems developed by some POs
 - Digitalised and interconnected :
 - 2 auctions using KOSMOS
 - 14 auctions using MercaPesca system
 - Significant share of buyers attend physically to the auctions

2. Impacts and challenges of digitalisation

Increase in the number of buyers

- Increase of the number of buyers, attending the auction remotely
- Decrease of physical presence in auctions, 10% to 40% of buyers physically present with high digitalisation
- Possible impacts on the organisation of the value chain
- Digitalisation is perceived as an opportunity for some small-scale and remote auctions

Impact on prices

- Positive impacts on the market (according to stakeholders):
 - For fishing companies:
 - Increased opportunities thanks to the increased number of buyers
 - Higher prices to secure specific lots
 - For buyers : access to many auctions, comparison of prices in real time
- Quantitative analysis: no clear impact on prices based on data available

Quality and harmonisation of marketing standards

- Challenge to harmonise the information among auctions :
 - Information related to marketing standards (size, quality),
 - Additional information possibly developed in each auction (sub-quality, more detailed size...)
- Large range of information can be shared with buyers (aspects of lots, pictures)
- Digitalisation reported as a barrier for quality assessment by some stakeholders

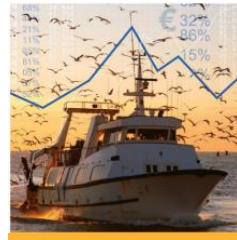
Acceptability among stakeholders

- Landing forecast is a sensitive information for fishers, protection via:
 - Aggregation by fishing zone or landing port
 - Estimates of landings based on extrapolation
- Greater acceptability among auctions and buyers:
 - New clients, higher first sale prices for auctions
 - Less time consuming, lower prices for buyers
- Reluctance remains for some stakeholders:
 - Increased competition in auctions
 - Need to see fish lots to assess quality

Keep in touch

SUBSCRIBE TO
EUMOFA NEWSLETTER

<http://www.eumofa.eu/mailling-list>



EUMOFA

European Market Observatory for
Fisheries and Aquaculture Products

www.eumofa.eu

contact-us@eumofa.eu

tanguy.chever@and-international.com

@EU_MARE

#EUMOFA

Thank you



© European Union 2024

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](https://creativecommons.org/licenses/by/4.0/) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.