Advice

European Market Observatory for Fisheries and Aquaculture (EUMOFA): Suggestions of studies to be integrated in the Work Programme (2026)

Brussels, 17 September 2026

1. Background

The European Market Observatory for Fisheries and Aquaculture (EUMOFA)[1] is a market intelligence tool on the European Union fisheries and aquaculture sector, developed by the European Commission. It aims to increase market transparency and efficiency, analyse EU market dynamics, and support business decisions and policymaking.

As in previous years, in 2025, the Market Advisory Council (MAC) adopted advice with suggestions of studies to be conducted by EUMOFA[2], including price structure analyses on cod (Portugal), octopus (Portugal, Spain, Ireland, France), squid (Spain, France, Belgium, Netherlands), shrimp and prawns (Portugal, Spain, Italy), horse mackerel (Spain) and sardines (Spain), and thematic analyses on the evolution of the Croatian market, Brexit, Norwegian farmed salmon of "production" quality, and Joint Ventures in Fisheries. DG MARE graciously accommodated the mentioned suggestions in the rolling work programme of EUMOFA, with the exception of the last two.

[1] https://www.eumofa.eu/

[2] MAC Advice on "European Market Observatory for Fisheries and Aquaculture (EUMOFA): Suggestions of studies to be integrated in the Work Programme (2025)" (1 September 2025)

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The ex-post information provided by EUMOFA on volumes, values and prices of fishery and aquaculture products, including imports and exports, is greatly appreciated by the members of the MAC. The MAC committed to providing further suggestions for the work programme.

2. Price Structure Analyses[3]

The price structure analyses consist of an assessment of prices of a specific product along the different steps of the supply chain. EUMOFA publishes three to four of these analyses per year. For each analysis, usually, there is a focus on three selected Member States.

2.1. Cupped and flat oysters

In 2022, EUMOFA published a price structure analysis on oysters in France, Ireland, and the Netherlands[4]. In the view of the MAC, it would be relevant to update and expand the study, in order to document and assess existing market dynamics, including EU production, the impact of imports from third countries, competitiveness, and level-playing-field. The study should cover production, trade, and pricing dynamics, while also considering the structural impact of climate change on production systems.

The study should focus on cupped oysters (*Crassostrea gigas*) in the United Kingdom, France, Ireland, and the Netherlands, the core countries for production and trade in Europe. The study should also focus on flat oysters (*Ostrea edulis*) in France, the United Kingdom, Spain, and Italy, analysing a genetically and commercially distinct production cluster. The analysis of these two market segments should allow for a comparative perspective on price formation.

2.2. Mussels

[3] https://eumofa.eu/en/market-analysis

[4] https://eumofa.eu/documents/20124/58126/PTAT+Oyster_EN.pdf

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In 2022, EUMOFA published a price structure analysis on mussels in Spain, France, Italy, and Ireland[5]. In the view of the MAC, EUMOFA should update the mentioned study, particularly focusing on blue mussel (*Mytilus edulis*) and Mediterranean mussel (*Mytilus galloprovincialis*). The analysis of imports from third countries, including Chile and post-Brexit United Kingdom, should be a key dimension of the study.

2.3. Japanese carpet shell

In 2024[6], the MAC recommended the undertaking of a price structure analysis on clams, geographically focused on Italy, France, and Spain, the three main EU producers. In their reply, DG MARE acknowledged the value of conducting the mentioned analysis and confirmed the intention to include it under the 2025 work programme.

According to information shared by MARE A4, following a more in-depth assessment, it was decided, as a first step, to prepare a species profile on clams and subsequently reassess the need for a price structure analysis. MARE A4 indicated that the analysis is particularly challenging, as the commercial designation covers several species with significant price differences. The lack of specificity of the codes of the Combined Nomenclature can make the analysis of trade flows more challenging. Nevertheless, MARE A4 expressed availability to proceed with the analysis, if the MAC remained interested, but this would require focusing on a limited number of species.

The MAC welcomes the development of a species profile on clams and acknowledges the challenges related to the heterogeneity of species under the existing coding. The lack of precision in the data reporting by Member States can weaken the clarity on the capacity of the EU's

[5] https://eumofa.eu/documents/20124/35713/PTAT_Mussels_FV_EN.pdf/

[6] MAC Advice "European Market Observatory for Fisheries and Aquaculture (EUMOFA): Suggestions of studies to be integrated in the Work Programme (2024)" (5 June 2026)

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production systems. The MAC maintains interest in the undertaking of an analysis on clams, which would contribute to improving market transparency for the key bivalve species.

In the view of the MAC, it would be relevant to proceed with a price structure analysis specifically on Japanese carpet shell (*Ruditapes philippinarum*), covering Italy, France, and Portugal. In the recent years, in Italy, there has been a sharp decline in the aquaculture production of clams due to the presence of blue crabs, translating into significant farm closures, which has structurally altered the markets. Therefore, the analysis should provide more information on the consequences faced by the sector.

2.4. Sardines

Following a previous suggestion[7], in March 2026, EUMOFA published a case study under the "Monthly Highlights" on fresh sardine in the EU, focusing on Spain[8]. Following a previous suggestion, in August 2026, EUMOFA is expected to publish a case study on the Croatian market since accessing the EU, focusing on sardine, anchovy, and hake. In the view of the MAC, these two case studies should be complemented by a comprehensive price structure analysis, covering Croatia, Spain and Italy, as the Italian market is important for both production and consumption of sardine products. The study should cover fresh and canned products, including both mass-market and premium segments. Furthermore, the study should cover the export positioning of the industry in the three Member States.

3. Thematic Analyses

[7] MAC Advice on "European Market Observatory for Fisheries and Aquaculture (EUMOFA): Suggestions of studies to be integrated in the Work Programme (2025)" (1 September 2025)
[8] https://eumofa.eu/documents/20124/232596/MH+3+2026_Final.pdf/

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The thematic analyses consist of punctual market studies made upon request of DG MARE. These aim to respond to a specific need of the sector or policymakers.

3.1. Market evolution and forecast of fresh and chilled fish fillets in the EU

The EU market for fresh or chilled fish fillets represents a dynamic segment of the fishery and aquaculture products industry. In the view of the MAC, it would be relevant to undertake a study to analyse supply and demand, processing, pricing, segmentation, and procurement. The study should also explore the trends for the main species farmed in the EU.

3.2. Market trends and consumer insights in ready-to-cook and ready-to-eat fresh fish meals

EU consumers increasingly express preference for meals that are convenient, healthy and high-quality. Ready-to-cook and ready-to-eat fresh fish products respond directly to time constraints, while also delivering on nutrition and freshness – two attributes strongly associated with fishery and aquaculture products. In the view of the MAC, it would be relevant to undertake a study on market trends and consumer insights in ready-to-cook and ready-to-eat fresh fish meals.

3.3. Low-trophic aquaculture products

In 2026, CINEA published a study on "EU Aquaculture: Greenhouse gas reduction costs and pathways to net zero by 2050"[9], which indicates that the farming of bivalves and other species used in low-trophic aquaculture, such as shellfish, algae, and sea urchins, is of particular strategic interest in the upcoming years. These species align with the ambitions of the European Commission and Member States to develop sources of animal protein with a lower carbon

[9] European Climate, Infrastructure and Environment Executive Agency. (2026). *Study on EU aquaculture: Greenhouse gas reduction costs and pathways to net zero by 2050*. Publications Office of the European Union.

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footprint. Therefore, in the view of the MAC, it would be relevant to undertake a study on the EU's low-trophic aquaculture species.

3.4. Misalignment between evolving scientific nomenclature of aquatic species and tariff classification systems

Taxonomic updates, including changes at species and genus level, can lead to inconsistencies in tariff classification, product identification, and labelling, particularly where tariff nomenclature refers to outdated scientific names or taxonomic groups, contributing to legal uncertainty and operational challenges for operators and public authorities.

In the view of the MAC, EUMOFA should assess the impact of nomenclature changes on tariff classification. A systematic evaluation of proposed amendments to the Harmonised System of the World Customs Organisation and of the corresponding transposition into the Combined Nomenclature and to TARIC, including potential implications for species denomination, product classification, and applicable tariff rates, would be relevant.

Furthermore, a periodical review of the changes in scientific species names, based on sources like the World Register of Marine Species and FishBase, to identify cases with an impact for the Harmonised System, the Combined Nomenclature, and TARIC classifications would also be relevant, particularly focusing on potential clarifications or adaptations.

3.5. Fish auctions and first-sale structures across the EU

In the EU, fishery products can be sold through auctions, producer organisations, direct contracts, or wholesale markets. Several coastal Member States operate auction systems, which contribute to transparent and efficient price formation, alongside other first-sale structures. Landlocked Member States rely primarily on alternative channels, such as direct contracts and wholesale

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markets. At the same time, some coastal Member States, for example Croatia, do not make significant use of auction systems for first sales of fishery products.

In the view of the MAC, EUMOFA should analyse the existing first-sale structures by Member State, including the drivers and impacts of different practices across the EU. For Member States with fish auctions, the study should examine governance structures (public or private management), price formation mechanisms, and the degree of digitalisation[10]. For coastal Member States without significant auction systems, the study should analyse the potential added value of introducing auctions. The study should also consider the role of producer organisations in first-sale arrangements.

4. Monthly Highlights (Case Studies)

Under the "Monthly Highlights", EUMOFA delivers, each month, two comprehensive reports on specific topics.

4.1. Fresh tuna products in the Adriatic Sea

Following a previous suggestion[11], EUMOFA is expected to publish, in the second semester of 2026, a study on the EU market of tuna products. In the view of the MAC, it would be relevant to follow-up with a case study on the market of fresh tuna, particularly bluefin tuna (*Thunnus thynnus*), in the Adriatic Sea, which is a high-value segment for Croatia and neighbouring Adriatic countries. The study should take into account the existing limited supply and corresponding management measures.

5. EUMOFA Talks

[10] https://eumofa.eu/documents/20124/185733/Digitalisation+at+First+Sale+Stage_FINAL.pdf/
[11] MAC Advice on "EUMOFA Study on EU Tuna Sector (Priorities & Scope)" (29 September 2023)

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Occasionally, EUMOFA organises events with panels of experts in an online format or at specialised events, known as "EUMOFA Talks". The MAC would like to suggest the following topics to be addressed in the future:

- Valorisation of by-products and unwanted catches[12] of fisheries and aquaculture, from a blue bioeconomy perspective, to create added value
- Farming in water: strategies to ensure social acceptance and meet demand for high quality food through sustainable aquaculture (follow-up to 2023 event[13])

6. Conclusion

In summary, the MAC considers that the European Commission should integrate the following topics in the rolling work programme of EUMOFA:

- Price Structure Analyses
    - Cupped and flat oysters: France, Ireland, Italy, Netherlands, Spain, United Kingdom
    - Mussels: France, Ireland, Italy, Spain
    - Japanese carpet shell: Italy, France, Portugal
    - Sardines: Croatia, Italy, Spain
- Thematic Analyses
    - Market evolution and forecast of fresh and chilled fish fillets in the EU
    - Market trends and consumer insights in ready-to-cook and ready-to-eat fresh fish meals

[12] European Commission. (2020). *Study on market outlets for unwanted catches: Executive summary*. Publications Office of the European Union.

[13] https://eumofa.eu/video-recording-of-eumofa-talk-at-seafood-expo-global-2023-is-available-online

- Misalignment between evolving scientific nomenclature of aquatic species and tariff classification systems
- Fish auctions and first-sale structures across the EU

- Price Structure Analyses Monthly Highlights (Case Studies)
  - Fresh tuna products in the Adriatic Sea
- EUMOFA Talks
  - Valorisation of by-products and unwanted catches of fisheries and aquaculture, from a blue bioeconomy perspective, to create added value
  - Farming in water: strategies to ensure social acceptance and meet demand for high quality food through sustainable aquaculture

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