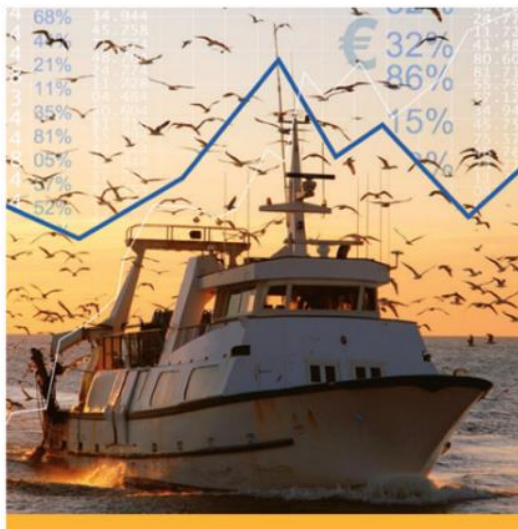




European
Commission



EUMOFA

European Market Observatory for
Fisheries and Aquaculture Products



www.eumofa.eu

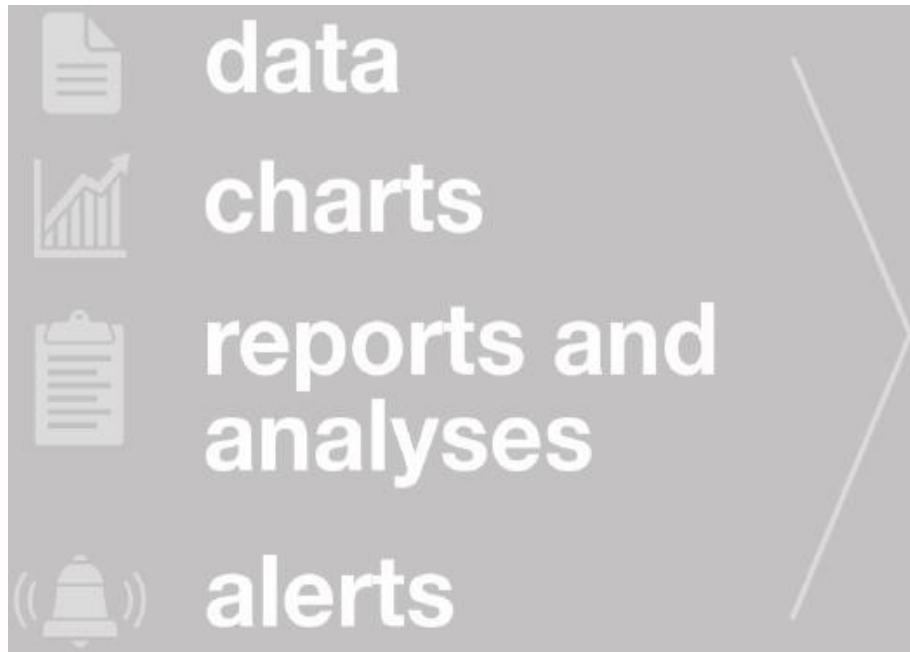
Seafood Expo Global

Brussels - April, 2017

Purpose and main services of the EUMOFA



- ✓ Increase **market transparency** and **efficiency**
- ✓ Analyse **EU markets dynamics**
- ✓ Support **business decisions** and **policy-making**
- ✓ Support **Producers Organizations**



- **Overview of market phenomena**
 - **Monthly Highlights**
 - **The EU fish market**
 - **Price transmission case studies**
- **Exhaustive database at EU and Member State level**
 - **Predefined queries**
 - **Ad-hoc queries**
- **Key figures at EU and Member State level**
 - **Profiles on consumers' habits**
 - **Fiches by supply chain stages**
- **User support**
 - **Toll free number**
 - **E-mail**

Overview of the EUMOFA database



Data are harmonised in 97 Main commercial species and 12 Commodity groups

	Weekly	Monthly	Yearly	
Supply chain stages	<ul style="list-style-type: none"> First sales (12 MS + Norway) Wholesale (4 MS) Import (EU level) Retail prices (14 MS) 	<ul style="list-style-type: none"> First sales (13 MS + Norway) Import-Export (All MS) Consumption (12 MS) 	<ul style="list-style-type: none"> Consumption & supply balance Landings Aquaculture Import-Export Processing 	All MS
Type of data	Data - published 1/2 weeks after sales - for selected species and places of sales.	Volumes and values - published 3 weeks after sales - for all species and places of sales.	Volumes and values for all species - published as soon as EUROSTAT release them	
Data publishing	<ul style="list-style-type: none"> 7 pre-defined queries tool for extracting data from the database (ad-hoc queries) 	<ul style="list-style-type: none"> 17 pre-defined queries tool for extracting data from the database (ad-hoc queries). 	<ul style="list-style-type: none"> 16 pre-defined queries tool for extracting data from the database (ad-hoc queries). 	



◆ European Commission

- ◆ EUROSTAT
- ◆ DG TAXUD

◆ EU Member States

Plus:

- ◆ Norway
- ◆ Iceland
- ◆ Other non-EU countries (e.g. US, China, Chile, etc.)

◆ Private data providers

◆ FAO Globefish

The **quality of data** published by EUMOFA is ensured by:

- the **reliability** of the National sources and private information providers involved;
- the **compliance** of sources with delivery agreements and the related **continuous updating** of data;
- the **regular checks** performed by the EUMOFA analysts at both stages of collection and dissemination.



Market intelligence

is based on the **detection** and **understanding** of the main phenomena concerning a specific product (or a group of products) in a given period



several and differentiated analyses at different levels



EUMOFA homepage



European Commission

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EUMOFA European Market Observatory for Fisheries and Aquaculture Products

24 languages

Data & Reports

- Weekly indicators
 - Predefined queries
 - Ad-hoc queries
- Monthly Trends
 - Monthly Highlights
 - Predefined queries
 - Ad-hoc queries
- Yearly data
 - The EU fish market
 - Predefined queries
 - Ad-hoc queries
- Price structure analysis
- Bulk Download
- MacroEconomic Dashboard

Easy access to database and documents

- Methodology
- Library
- EUMOFA publications
- Useful documents
- Media library
- Links
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Latest publications



EU CONSUMER HABITS REGARDING FISHERY AND AQUACULTURE PRODUCTS

Latest publications



The EU fish market – 2016 Edition



Monthly Highlights N. 3-2017

Regular reports and studies

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EU fishery market data

Key figures at EU level



Market profiles at MS and EU level

Key figures by main species

FIRST SALES - weekly indicators

	Week 10- 2017	Week 11- 2017	% variation
Atlantic cod, gutted, size 1 in Thyboren (Denmark)		3.23	
European hake, gutted, size 2 in Lorlent (France)	2.07	2.34	12.7%
Atlantic herring, whole, size 7a in Ventspils (Latvia)	0.18	0.16	-11.1%
Common octopus, whole in Matosinhos (Portugal)	5.52	6.44	16.7%
Lemon sole, gutted, size 2 in Grimsby (United Kingdom)	7.12	5.53	-22.3%

Key figures on latest prices



How the EUMOFA supports your decision-making?

Specific case studies have been developed,

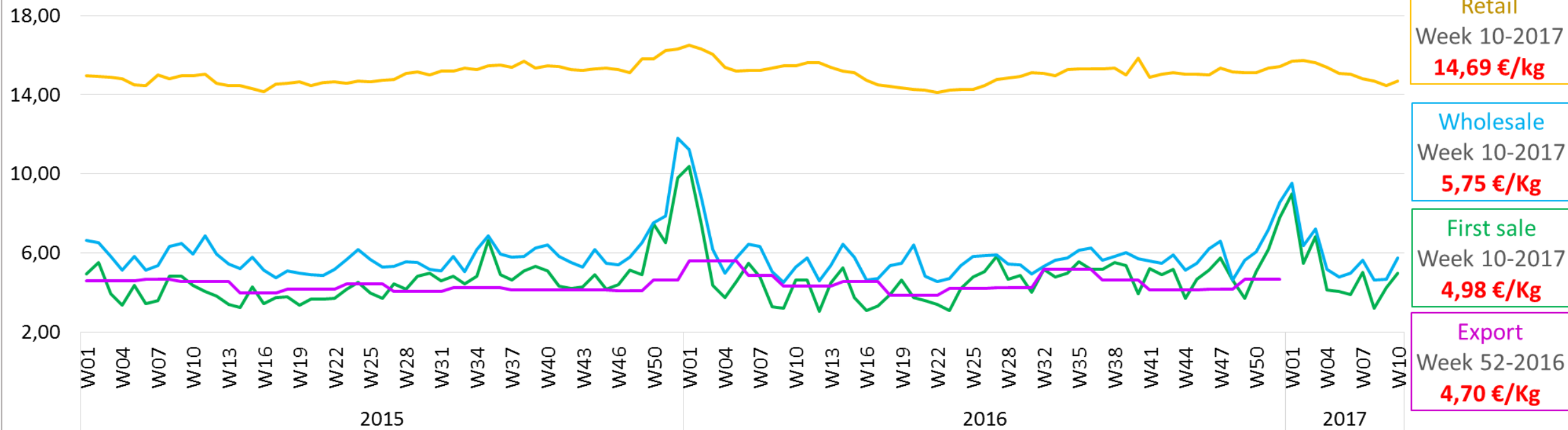
providing **concrete examples** of

how EUMOFA's data and publications contribute to this objective.

Analyses on prices along the supply chain



Price trend at different stages of the supply chain in Spain
(Hake, fresh, whole/gutted)



Analyses on price formation along the supply chain

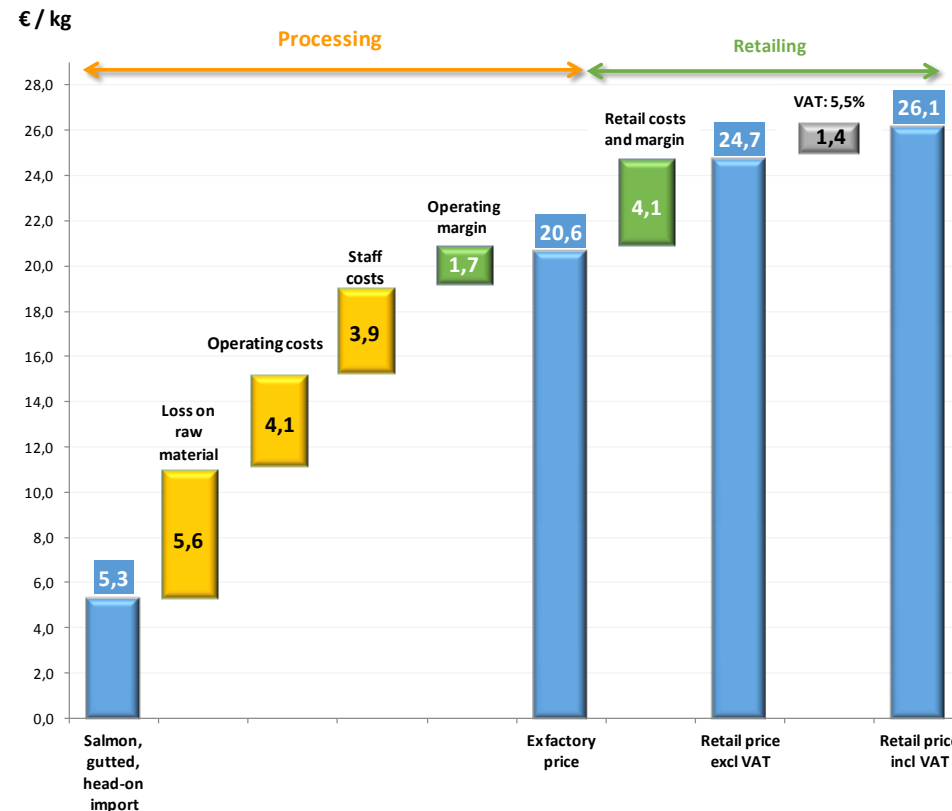


The EUMOFA developed:

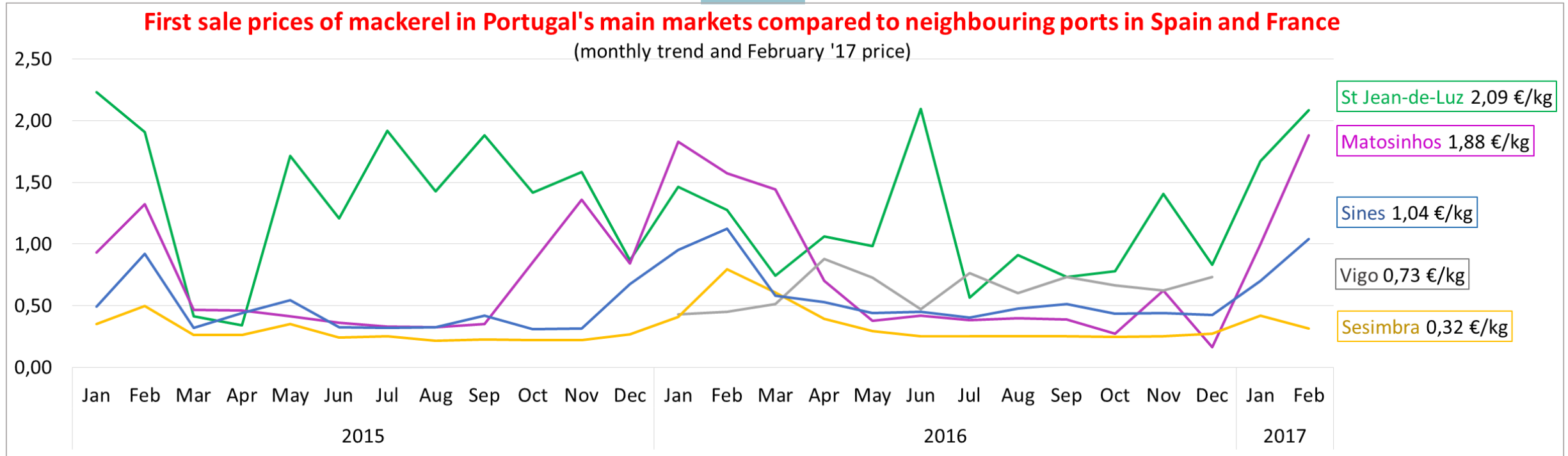
- a **methodology and guidelines** for understanding the links between prices at the different levels of the supply chain
- using **EUMOFA prices** and other **macroeconomic datasets**
- **examples of a possible use of this tool** for specific products in specific countries.

Case studies available on www.eumofa.eu

- ✓ Fresh cod in the United Kingdom
- ✓ Alaska pollack fish fingers in Germany
- ✓ Fresh seabream in Italy
- ✓ Fresh hake in Spain
- ✓ Plaice in the Netherlands
- ✓ Fresh carp in Central Europe
- ✓ Herring preserved in glass jars in Sweden
- ✓ Smoked salmon in France



Comparison of first sale prices in the same geographical area



In Portugal, almost **40% of mackerel is sold in Sesimbra**. Nevertheless, it is the place of sale registering **the lowest price** during the period analyzed.

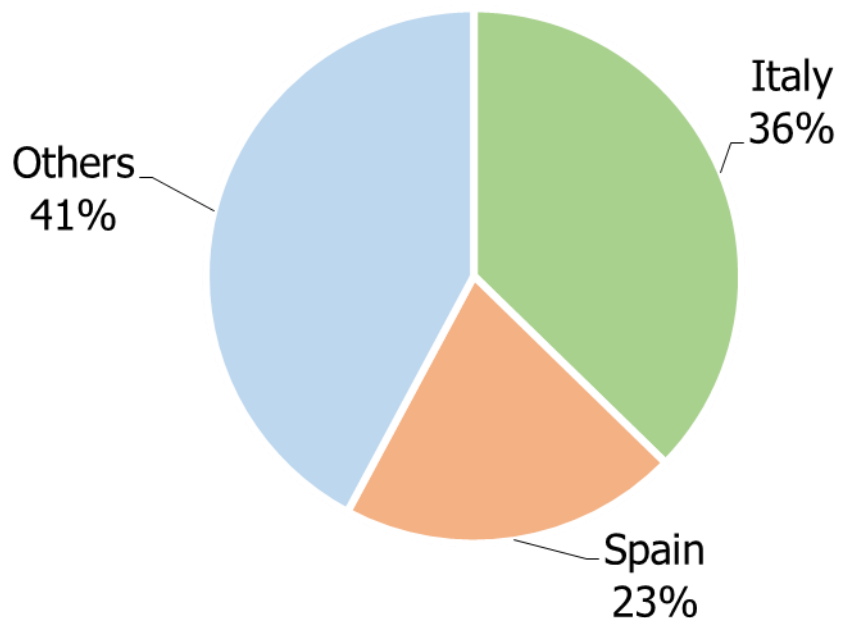
Matosinhos and **St Jean-de-Luz** registered higher mackerel prices, coupled with an **upward trend**.

Identification of countries of destination for exports



Main countries of destination in value

Sole from the Netherlands, 2016



Other relevant importers of sole in the EU - 2016

	value (EUR million)	volume (tonnes)
France	25,93	2.213
Belgium	21,57	1.881
Germany	11,55	828
United Kingdom	4,32	464
Portugal	3,03	615

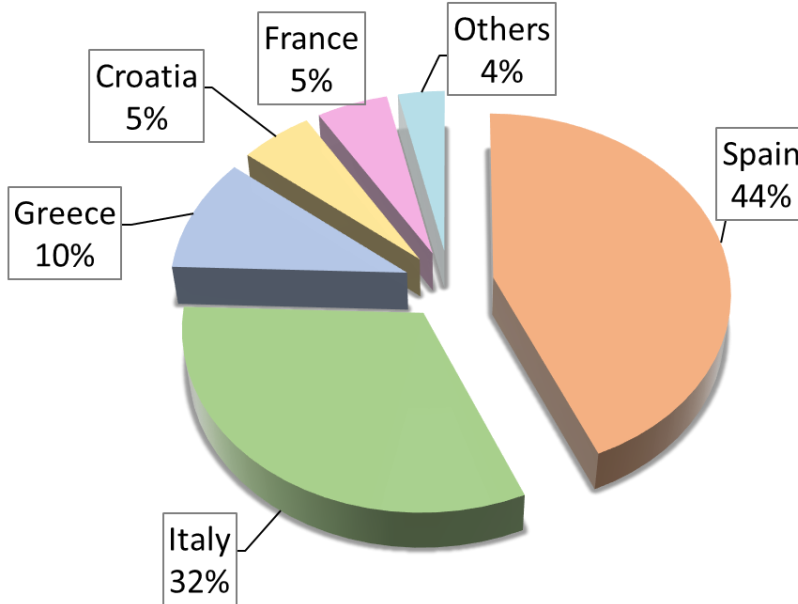
Almost 60% of Dutch sole exports are destined to **Italy and Spain**.

These two countries play an important role in determining the average Dutch export price.

Analysing the market situation for one species: anchovy

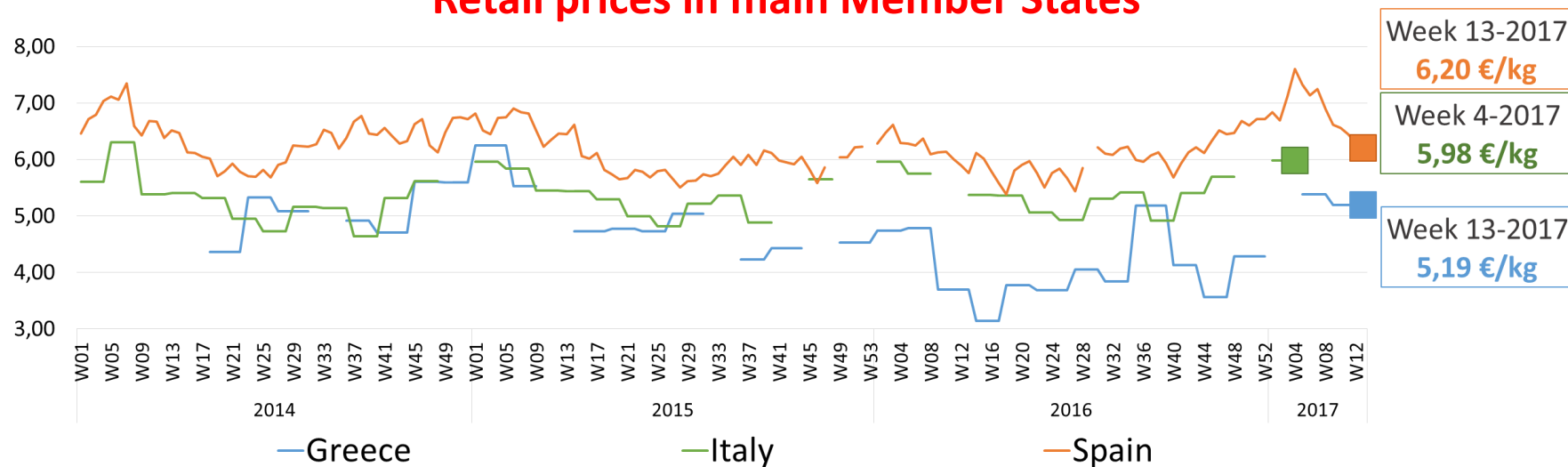


Main Member States landing anchovy (value, 2015)



Trade → Anchovy ranks 4° in seafood products **exported** by Greece. It is mostly sold to **Italy (salted)**, to **Spain (fresh and frozen)** and to **Turkey and Albania (fresh)**.

Retail prices in main Member States



Thank you for your attention

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