



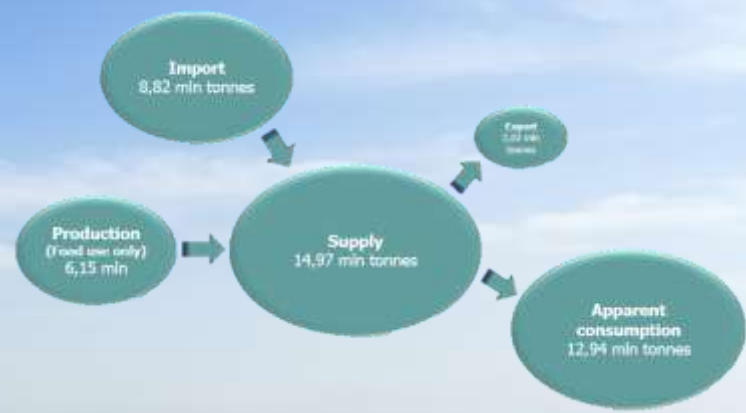
PrimeFish



Horizon 2020
Programme

THE PRIMEFISH PROJECT: BUILDING COMPETITIVENESS IN THE SEAFOOD SECTOR

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EU seafood producers are facing increased competition from overseas

- about 68% of EU seafood for consumption is imported

Capture fisheries, supply of fish, overfishing and seasonality

Aquaculture, regulatory issues, conflicts with other water users

- not price competitive compared with imports
- EU aquaculture growth has stagnated since the turn of the century

Many products fail on markets and producers unable to meet demand of consumers



**Economic performance
and prices**

*Fisheries and aquaculture
competitive index (FACI)*

For companies how well they
are doing in the global business
of harvesting/catching
processing and marketing
Benchmarking of countries and
sectors

*"Boom and bust" early warning
signs - based on analysis of
Boom and bust price cycles*

**Supply chain relations and
regulations**

Strategic value chain analyser

Where in the value chain
companies chose to position
themselves and how changes in
the environment can affect this
choice

**Products, consumers and
seafood market trends**

*Product success check –
likelihood of new seafood
product launched will be
successful on market*

*Innovation and price analysis –
willingness to pay for
innovation*

*Seafood in sustainable diets – a
model to evaluate the cost
effectiveness of increased fish
consumption*

CASE STUDIES

Species

Originating from

Cod



Herring



Salmon



Trout



Sea-Bass



Sea-Bream

Pangasius



PrimeFish - outcomes

To be used by: the catching sector, aquaculture producers, processing companies, market analysts and public authorities

■ EU countries
■ Non-EU countries
■ Areas for market and consumer research

Decision-support Tool

Software tool

Growth Risk
Analyser

Competitive
position
analyser

Value chain
analyser

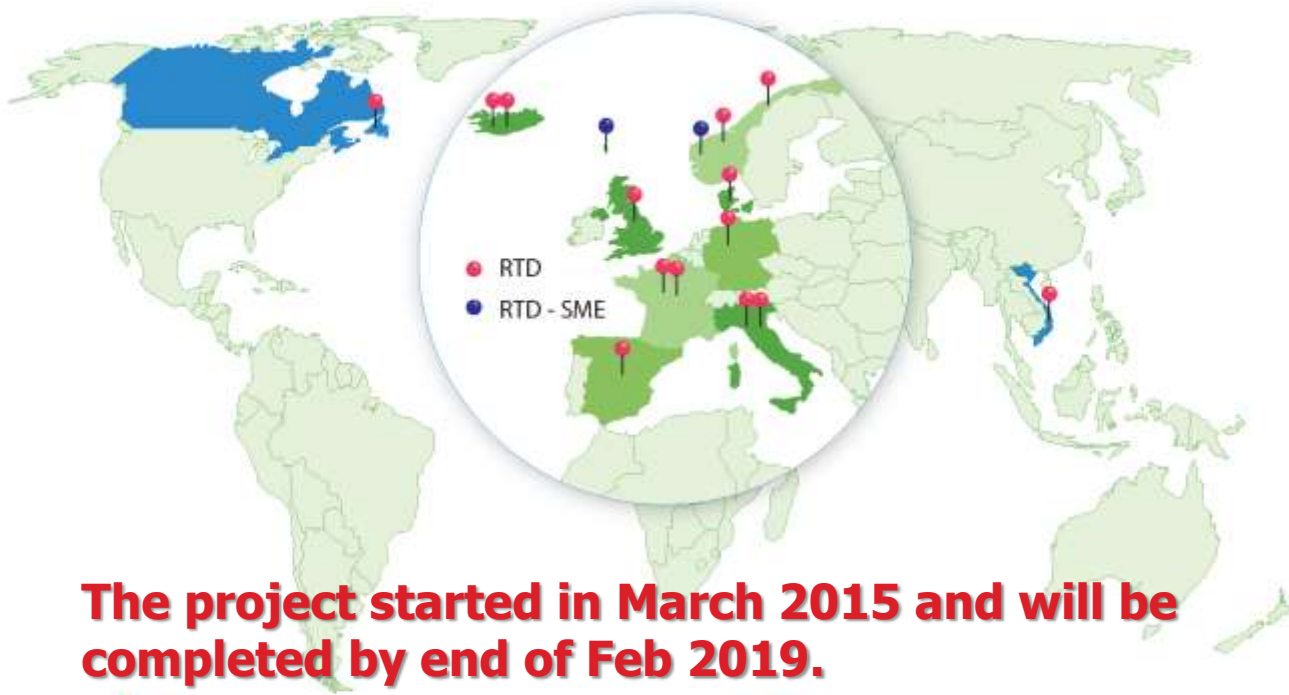
Success &
Failure Stories

Willingness
to Pay




















Product
success
check

Software tools

- Easy to use web-based “what if” tools
- For understanding and predicting seafood market behaviour



The project started in March 2015 and will be completed by end of Feb 2019.

1.   Matis Ltd (coordinator)
2.   University of Aalborg
3.   Syntesa
4.   French National Institute for Agricultural Research
5.   Université de Savoie
6.   Technologie-Transfer-Zentrum Bremerhaven
7.   University of Iceland
8.   University of Parma
9.   University of Pavia
10.   Kontali Analyse
11.   Norwegian Institute of Food, Fisheries and Aquaculture Research
12.   University of Tromsø
13.   Centro Tecnológico del Mar
14.   University of Stirling
15.   Nha Trang University
16.   Memorial University



Data sources

- **Public**
 - FAOSTAT, FAO Fish price index, EUROSTAT, EUMOFA etc
- **Specific on household panels and markets**
 - Nielsen, KANTAR Worldpanel, NBS, GNP Mintel
- **In-house**
 - Kontali, INRA
- **Consumers – through surveys**
- **Companies and industrial associations - IRG**
 - Through questionnaires and personal interviews

PrimeFish - large Industry Reference Group (IRG)

To facilitate access to data in EU, Canada and Vietnam for the



Impact of PrimeFish on fisheries and aquaculture sectors

- Benchmark evaluation of "world class" performers
- Innovation, successes and failures on markets
- Enhanced insights into the global value chain & market dynamics
- Prediction of price behaviour and early warnings of "boom and bust" cycles
- Seafood products better suited for consumer needs and preferences
- Healthier and better diets – increased fish consumption

Improved economic sustainability and competitiveness

Data collection



PrimeFish

Implementation of tools and models in a decision support system.



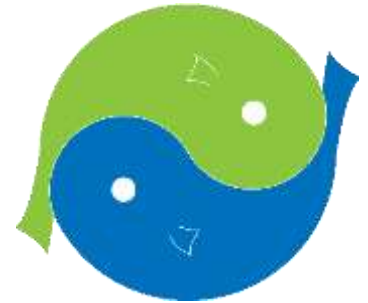
Horizon 2020 Programme

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- Atlantic Canada Opportunities Agency (Federal government)
- Department of Fisheries and Aquaculture (Provincial government)
- Department of Business, Tourism, Culture and Rural Development (Provincial government)
- Canadian Centre for Fisheries Innovation (MUN)



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