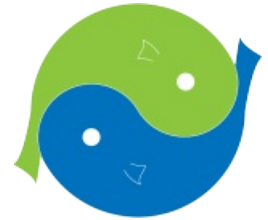




PrimeFish



#RD #seafood #H2020 #market #assessment #BlueGrowth



"We count on PrimeFish to foster our profitability";
Javier Ojeda, manager of
APROMAR



PrimeFish project
targets the seafood
economic performance

primefish.eu



Editorial

April 2015 has marked the starting point for the PrimeFish project, a research endeavor that will enhance the competitiveness of the European seafood market. Six European research centers and six universities, two SMEs and two universities from Canada and Vietnam have joined their efforts to foster cooperation and knowledge about seafood economics. For four years, with the support of the European program Horizon 2020, this project will possibilite several case studies about high-consumed species, market trends for creating shared value.

The PrimeFish newsletter will deliver the latest news about the project and related topics, keeping the reader updated on the major findings, work development and collaboration actions with other projects. We are expecting your suggestions, questions and doubts in the e-mail socialmedia@primefish.eu.

The PrimeFish Team

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Editorial Information

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For more information, please contact to the PrimeFish team: info@primefish.eu

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All PrimeFish members attended the kick-off meeting in Matis headquarters (Iceland).

PrimeFish in 2 minutes

Europe stands out as the first seafood market in the world with a business value of 21€ billions in 2014 (source: EUMOFA) and, at the same time, is steadily positioning itself as the most important seafood importer. However, these positive figures are not reflected in the European companies that are becoming less and less competitive due to some inherent factors, such as the seasonality of some species, but also because of the competence from foreign firms, the instability of the market and their incapacity to meet the demand's needs. The PrimeFish project will support stakeholders in the market analysis from a quantitative and a qualitative perspective, and will assess how they can strengthen the economic sustainability by creating shared value through dialogue between stakeholders about the actions required to improve economic prosperity. To achieve this goal, the PrimeFish Consortium is structured in 8 work packages, which include 44 tasks and involving more than 70 researchers.

What are the expected results?

Research will be materialized into new knowledge about seafood market trends and tools to enhance the competitive performance of the industry. The main outcome of the project is a decision support framework to improve decision-making and production planning, to launch new products and avoid extreme price cycles. This framework will provide a web-friendly toolkit to predict market behavior and better understand consumer

preferences.

In particular, five case studies will be carried out on production and market of the trout, salmon, herring, cod, seabass and seabream. Non-European species as Canadian salmon and Vietnamese pangasius, which are recognized for their market success, are also included in the study to compare and extract their good practices.

Beyond improving competitiveness, the enhancement of local consumption through local production is one of the ultimate goals of the project. Gudmundur Stefansson, coordinator of PrimeFish, outlined how the project will “give premium attributes to seafood products and provide companies with the necessary tools for distinguishing themselves in the market, improve the labelling, traceability and certification schemes”.

H2020 project

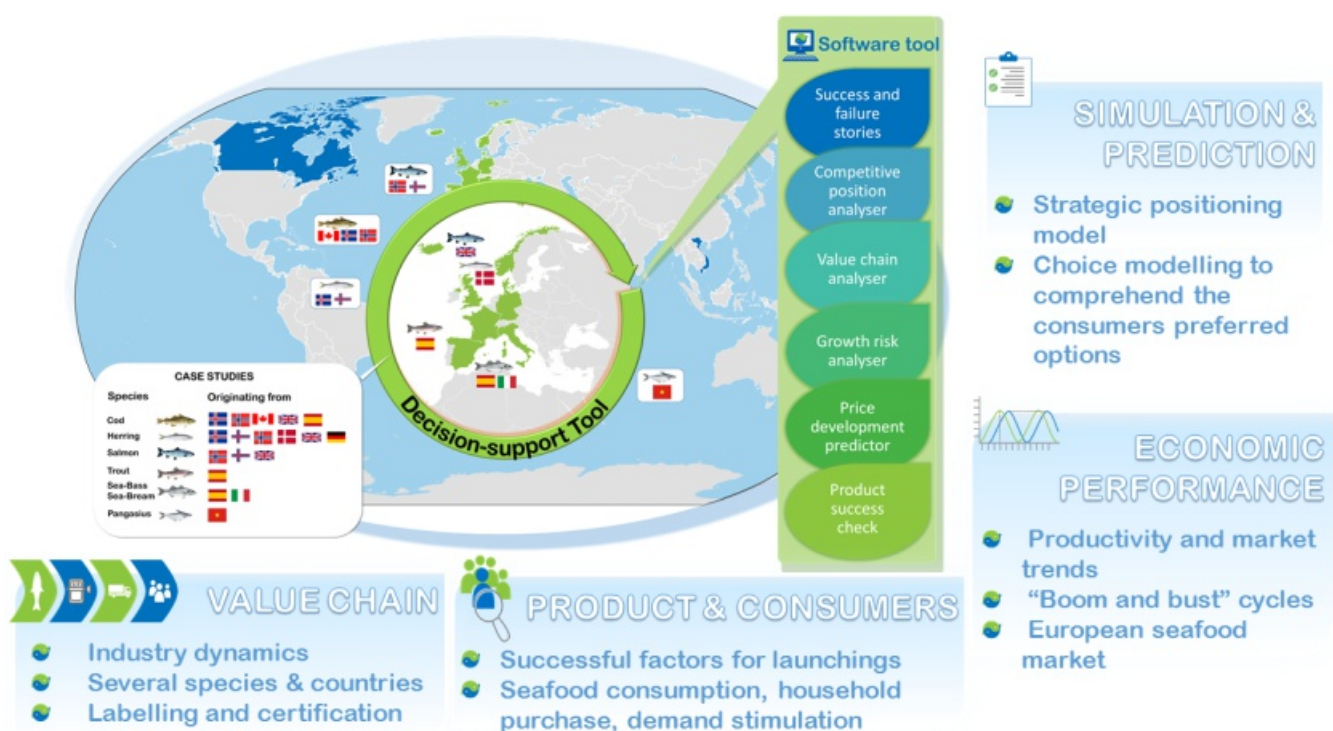
The PrimeFish project has come into shape thanks to the funds of the European Union under the Horizon 2020 framework programme for research and innovation. In 2014, the European Union decided to strengthen the research activity in Europe with a bigger budget and less red tape than in the previous Seventh Framework Program (2007-2013). According to the EU Commission, the fact of being granted as an H2020 project is already a quality guarantee as the



The PrimeFish kick-off meeting in Iceland.

program has a rate of success around 14% compared with the whole of FP7 around 20%. Since PrimeFish takes part of H2020, the project has to meet with a standard of excellence concerning research, but also

regarding the social impact of this research. One example of this commitment is the H2020 Open Research Data Pilot for which it has created a Data Management Plan to handle the data used in the project and specify how it can be used by other projects.



"We count on PrimeFish to foster the profitability and sustainability of our companies", Javier Ojeda.

Javier Ojeda, manager of the Spanish Association of Marine Aquaculture, participates in PrimeFish as one of the members of the external Strategic Advisory Board (SAB) and is a recognized voice in the Spanish aquaculture sector betting u. He has answered some questions about the latest trends in aquaculture and the next steps of the sector.

PrimeFish is focused on studying and enhancing the profitability of the European fishing and aquaculture sector. Why did you decide to get involved in this project?

At least half of the key to the success of an aquaculture company depends on marketing and the other half relies on keeping the production cost-efficiently. APROMAR considers that PrimeFish's work is very important as the project is focused on analysing variability and volatility at first sale prices, seeking to explain why it is so hard to introduce new species in the market, what are the consumers' preferences, and how we can enhance an European policy framework which has unnecessary and excessive administrative costs and taxes for aquaculture. We count on PrimeFish to foster the profitability and sustainability of our companies.

Could you explain what is the role of an external advisor in an H2020 research project?

As an advisor in the External Strategic Advisory Board (SAB), I offer an external guidance about the overall progress of the project. In fact, several projects seeks only for finishing the project and, sometimes, without paying much attention to the achievements of applicable results for the sector.

Seabream and seabass are two of the PrimeFish case studies. Spain is the third European producer of both species by volume, which are the main challenges for the Spanish sector? And for the European?

One of the main challenges of the project is to achieve reciprocity in the marketing of European and third country products. In other words, European producers must comply with certain rules to trade in the European Union, rules that influence their production



Javier Ojeda, APROMAR manager.

costs and their marketing performance. Nonetheless, third country producers do not necessarily have to respect them. Another challenge comes from the need to address the market intelligence by providing companies with performance tools to work on the market. The third challenge will be enhancing the provided information to the consumer. Currently, at both European and Spanish level, we have broad demanding regulations, but they are not always respected.

You have been the manager of the Spanish Marine Aquaculture Producers Association (APROMAR) for 12 years and you have also a long experience as an advisor in governance aspects. How does collaboration between the business and the institutional sector usually develop?

In order to achieve a good collaboration, you need to

have effective, qualified and proactive institutions. I can also point that, from the business side, you need to have associations with a strong sectorial representation that are able to speak on their behalf with a single voice. On the other hand, the associations also need to be serious, loyal and accurate to have a positive collaboration and quality discussions with the government.

"Many of the sector initiatives could be implemented with the help from EMFF funds"

European Union is approving the national packages of the European Maritime and Fisheries Fund (EMFF), could you advance your opinion?

The EMFF is wide and includes production, environmental, social and economic measures for the coastal and fluvial European areas. I must admit that aquaculture has made a significant progress from the previous funds. Finally, it seems that the aquaculture role is recognized in Europe. Luckily, many of the sector initiatives could be implemented with the help of EMFF funds, but administrations need to cut the red tape. In Spain, our main goal is to achieve the objectives of the National Aquaculture Strategic Plan with their support.

In 2005 you took part in the "Consensus project", about sustainability in aquaculture and, since then, you have kept on collaborating with other research endeavours. In the "Diversify project", you studied the market possibilities of new species. How have aquaculture farms changed in these ten years of research?

The production process, the systems, the automatization or the knowledge has been improved. We still need to improve the breeding zootechnics to foster the technological and biological performance of the production sites, but there have been major steps in innovation and implementation of new technologies. From an economic point of view, companies have also grown up; some have merged, others have kept the same size, but, anyway, in Spain, I perceive a sectorial maturity that allows them to engage in collective actions benefiting both the sector and their own competitiveness.

PrimeFish scientist have been especially aware of your work on certification labels, what work needs to be done on this topic?

Some companies, for instance distributors, begin to require business-to-business environmental labels and there is also a trend to include environmental issues in certification schemes. In the particular case of consumer labels, which we call business-to-consumer, the Spanish households are not asking for them as it is happening in Northern European countries. I do not know the reasons, but the Spanish consumer asks about the freshness, the origin and the price, but not for environmental labels. This fact does not mean that companies are not being environmentally friendly, in addition it reflects that a third party label, with additional costs, it is not for the current Spanish market.

In May 2015, APROMAR has launched the collective aquaculture label "Breeding in our seas", can you advance us some result?

We are deeply satisfied with the development of this label. We perceive the recognition by consumers and distributors. With this label, we have aligned interests from all value chain actors, since we are working together to offer something that consumers have been asking for: quality, of course, but also freshness, a near origin, a source of local employment, a reduced carbon footprint and, therefore, environmental advantages. Currently, we are already working on the promotional campaign for 2016.

Keeping the topic of promotion, have you any advice for an institution or company that is going to prepare an aquaculture campaign?

The European Union has published a study about aquaculture promotion campaigns, giving advice on interesting messages to use, messages that are not helpful and those which are even counterproductive. Any person, company or institution preparing a campaign on aquaculture should read this report.

"We are already working on the promotional campaign of 'Breeding in our seas' for 2016"

The recent approval of genetically modified salmon as human food in the United States has aroused many strong responses among the public. What does this mean for the European industry? And for the European consumer?

This issue does not affect us in Europe. Our society has quite different preferences from American consumers and, from APROMAR, we do not see any similar action in near future.

From your point of view, what are the main future trends in fish consumption?

I am not a guru, but I often hear about two main trends. On one side, we have aquatic products that have been elaborated, precooked, with a convenient packaging and easy-to-cook for those people with little time. On the other side, we have those who prefer to cook the products in order to keep the nutritional qualities of the fish. We have to keep in mind that there are not two kinds of consumers, but people chooses according to their needs in a particular moment.

Could you give us three profiles to follow in social media?

FAO is very active and its aquaculture and fisheries department launches very interesting messages, the Spanish Agriculture, Food and Environment Ministry

(MAGRAMA) is usually very appealing, and I would also highlight the Scottish Salmon Producers' Organisation, an especially dynamic branch.

Is there any seabream or seabass recipe that you would like to recommend?

I am not a great cook, but I would recommend to prepare them in salt for its simplicity and because it keeps the taste and succulence of the fish. It is a very visual way to cook them, it never gets overcooked and the bigger the fish, the tastiest dish.



Getting to know the partners: CETMAR

CETMAR is an inter-institutional coordination centre with an interdisciplinary integration of all marine research and technology resources. It was created to channel and reinforce the connection between RTD agents and sea-produce industries. The role of CETMAR covers education and training, scientific RTD and innovation. The staff is skilled in numerous EU programmes such as Horizon 2020, research Framework Programmes, INTERREG, European Fisheries Funds, etc. Since 2001, CETMAR has successfully coordinated and participated in a huge number of projects (300) and more than 125 services to, among others, EU Commission and National and Regional Governments. The socio-economic department is leading the participation of CETMAR in the PrimeFish project. The main working fields during

the last years can be framed in:

- Fisheries governance, including stakeholder engagement and participation
- Socio-economic aspects linked to coastal areas
- Protection of the environment
- Valorisation of by-products
- Marine resources and fishing technologies
- International cooperation
- Promotion, training and dissemination



CETMAR staff in 2015.

Turn the seafood consumption into your good cause

Each newsletter explores one of the many topics involved in the seafood sector from a hands-on perspective. In this number we focus on public awareness and the acceptability of aquaculture activities. If you want to participate, send your suggestions to socialmedia@primefish.eu

From the pond to the public

We invite you to play a game. If we say "aquaculture", "public" and "acceptance", what would you think? Would you go for a positive attitude or would you rather go for a negative one? Most people would associate aquaculture and public acceptance with an adverse relation. Concerns about aquaculture effects on the environment, on the society and on the consumer have grown in the last decades. Almost at the same pace as aquaculture has established itself as a reliable source of proteins that provides around the 25% of the fish consumed in Europe. What is keeping the sector and the public apart?

Gudmundur Stefansson, project coordinator, participated in a special meeting during AQUA2015 where the public acceptance and awareness of aquaculture was discussed. There, EU Commission highlighted their focus on increasing the positive public perception and acceptance of farmed product; not only towards the final consumers but also towards local communities. The PrimeFish coordinator explained some issues during that meeting:

- The public acceptance of the aquaculture sector and products is generally good, in contrast to the public awareness, which is lower.



FAO Anniversary of the Code of Conduct in Spain.

- Consumers are critical but interested in receiving more information on these products.
- Labels may be important, however, there are too many and the focus of consumers should be on a few to catch their attention.
- Some alternatives to impulse the public awareness and acceptance:
 - o Use key influencers such as chefs and nutritionists
 - o Offer guided visits to farms
 - o Use specific initiatives for children and young people

FAO organised a workshop on aquaculture perceptions in Vigo

Rosa Chapela, the leader of the "Creating shared value" working package of PrimeFish project, attended the workshop on aquaculture perceptions in Vigo (Spain), which was led by Doris Soto as part of the celebration of the 20 years of the FAO Code of Conduct for Responsible Fisheries. The major conclusions of this event can be summarized by answering the question "Why a holistic approach is needed to create a pathway towards the acceptance of aquaculture?":

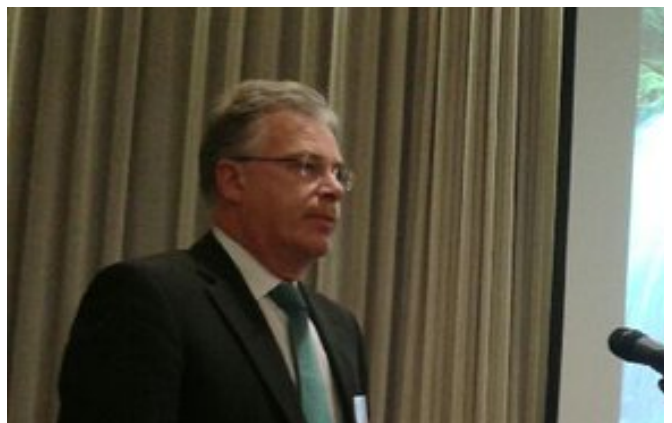
- Aquaculture is local and global at the same time, therefore, traceability goes beyond the area or country.
- The "wild versus farmed fish" dichotomy is too simplistic. The inter-relations of operating in the commodities markets influence consumers.
- There is a multiplicity of national and international, stakeholder interests, politics and jurisdictions.
- The modern aquaculture remains comparatively young in comparison to other food production sectors, then, sometimes it is not well understood or perceived in relation to the "open sea".
- Policies should be "science-based" and designed to consider the socio-economic context.
- The scrutiny of the public and other stakeholders will remain high and keep evolving.
- Blue economy and food security require a multi-pronged approach to yield preparedness and mitigation strategies.

First contributions of PrimeFish

A brief survey among aquaculture experts, carried out in the frame of PrimeFish, outlined how the array of labels and the diversity of species contributed to

confusion among consumers, instead of helping to inform them. They pointed how positive stories and campaigns have a lot to tell about good aquaculture practices and the excellence of standards. Some examples to get inspired by:

1. A new European fund to promote fish consumption. 2016 will begin with a new endeavor to promote European fish abroad with a common slogan: "Enjoy, it's from Europe". The European Commission will support seafood products together with another European agricultural or food products.
2. Global Salmon Initiative. Fourteen salmon producers joint together to work towards sustainability. Last June they issued their first report on the topic with a lot of data, including an interactive map with indicators where you can actually browse for fish escapes, antibiotic use or interactions with the community in specific companies.
3. The 30th November is the World Aquaculture Day and there are celebrations on the aquaculture day with specialized and general events in farms, museums, research centers and communities. Institutions as FAO, DG Mare and Ministries of Fish help to disseminate the activities among the public.
4. The sustainable trade initiative. Public and private actors are working towards several goals in aquaculture, but also in tea, soy or cocoa production. Concerning farmed fish, they are focused on some of the most consumed species: shrimp, tilapia and pangasius. They develop the "Farmers in Transition Fund" which has increased responsible production of shrimp and tilapia, and ASC Accelerator, a program to boost ASC certification for pangasius farms.



Gudmundur Stéfansson, coordinator of PrimeFish, in Aquaculture Europe 2015.

What else from PrimeFish?

PrimeFish contributes to the ICES Annual Science Conference

Petter Olsen, from Nofima, presents research projects in Czech Republic and China

PrimeFish project works in the development of its innovative decision support framework

Freshwater trout producer portrays the Italian market

Seafood economic performance focuses PrimeFish meeting in Milan

PrimeFish scientists start their work on products, consumers and market trends

Latest scientific literature on fisheries and aquaculture economy and marketing

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Soma, Katrine, and Claire Haggett. 2015. **"Enhancing Social Acceptance in Marine Governance in Europe"** Ocean & Coastal Management 117 (November): 61–69.

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Tiller, Rachel, and Russell Richards. 2015. **"Once Bitten, Twice Shy: Aquaculture, Stakeholder Adaptive Capacity, and Policy Implications of Iterative Stakeholder Workshops; the Case of Frøya, Norway."** Ocean & Coastal Management 118 (December): 98–109. doi:10.1016/j.ocecoaman.2015.09.001.

How PrimeFish benefits the seafood sector?

We have industrial organizations from sectors of catching fisheries, aquaculture producers, trade and retailers of seafood. They actively participate in the project through the Industry Reference Group (IRG), as advisory board, receiving science and technology developed in PrimeFish.

The members of the IRG have access to a vast part of the knowledge generated by the project, for instance, studies on consumer demand, and an active role in a wide range of activities, from providing business data to sharing insights about the sector. They will help us to have more accurate data, to reflect the current economic realm, and, therefore, to enhance a tailor-made tool for the European industry.

The main outputs of the project are market-based but also addressing societal concerns. Therefore, Primefish will enhance the competitiveness of companies while advancing the economic and social conditions in the communities in which it operates. This concept is named shared value and is addressed in the Prime decision support tool (PrimeDST).

Through a web-based toolbox, fishermen, aquaculture producers, processing companies, market analysts, public authorities and other stakeholders will be able to reconceive products and markets, improve productivity in value chain and finally, anticipate the economic realm to take strategic and operative decisions.



Why PrimeFish creates value for your company?

This project focuses on achieving applicable science in your day-to-day operations as well in your strategic planning. You can benefit of being member in the PrimeFish Industry Reference Group (IRG) by:

- Strengthening your prediction capacity of your clients' behaviour at the short, mid and long-term.
- Attending several workshops of Seafood thematic and Blue Growth, including a fluent communication flow with the project and connecting with other European stakeholders.
- Accessing to more than 75% of the project documentation through the private website (e.g. case studies, studies on market trends and consumer's behaviour, value chain analyses).
- Testing and validating the project outcomes (e.g. the web-based tool, accuracy of data).
- Being the first to receive tailor-made information about the project and its outcomes.
- Fostering your seafood promotion together!



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