



Setting the Scene: How Can We Improve the Competitiveness of the Seafood Sector?

The PrimeFish project is focused on enhancing the competitiveness of the European fisheries and aquaculture sectors and is funded by the Horizon 2020 programme of the European Union. 14 research centers and universities, and 2 SMEs from the European Union, Canada, Iceland, Faeroe Islands, Norway and Vietnam join the consortium.



Building upon Competitiveness: PrimeFish Tools to Take Strategic and Operational Decisions

The project is developing 2 tools as prototypes to back the decision making in the seafood sector:

- Prime Decision Support Framework (PrimeDSF)
- Prime Decision Support System (PrimeDSS)

This meeting was focused on 3 of the 6 features of the PrimeDSS:







- Competitive Position Analyser
- Value Chain Analyser
- Product Success Check

Interested companies can ask about our project in irg@primefish.eu

Check out our in-development tool and send us your thoughts to irg@primefish.eu

<http://dss.primefish.eu>
Username: guest
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PrimeDSS	Prediction of market behaviour	Seed data	Auto-adaptive content	Type
Success and failure stories	Product development – what has worked and what hasn't	EU NO.	<input type="radio"/>	
Competitive position analyser	Detailed benchmarking of own performance against national and regional competition	IS, FO, ES, CA	<input type="radio"/>	
Value chain analyser	Market success – case studies of how others have persisted on the market	EU, CA, VN	<input type="radio"/>	
Growth risk analyser	Identification of potential boom and bust cycles through price development prediction	UK, FR, ES, IT, DE	<input type="radio"/>	
Price predictor	Calculation of willingness to pay based on primary and secondary product attributes	DE, ES, IT, FR	<input type="radio"/>	
Product success check	Identifying the concrete consumer segments per product attribute	UK, FR, ES, IT, DE	<input type="radio"/>	



Understanding the Socioeconomic Environment: a Tool to Review your Competitiveness

PrimeFish is developing an index to measure the competitiveness of individual firms and individual countries: the Fisheries and Aquaculture Competitiveness Index (FACI). This index will be implemented into one of the features of the PrimeDSS: the Competitive Position Analyser.

Results for Spain are similar to those of Norway and Iceland with an average of 4.8 for Spain and Norway, and 4.9 for Iceland, factor in a scale going from 0 to 7. The national-level FACI consists of 144 items influencing competitiveness, based on the WEF Global Competitiveness Index, data obtained from national public sources and a survey conducted among specialists in each country (Spain, Iceland, Norway, Newfoundland, Vietnam). The firm-level FACI is based in a survey to aquaculture, harvesting, processing or marketing firms.

Data: the project should ensure the protection of sensitive financial data from companies, while getting a significant sample to offer accurate results. A possible solution: data from a single source will not be used to respect its anonymity.

Quota management and the **role of institutions** was outlined as a key factor for the competitiveness of the Spanish sector and companies.

Possible improvements are the **extension to additional countries** (e.g. China) and the output as a chronological review, instead of the assessment of the performance in a particular moment.



Prototypes can be further developed when there will be interest from users





Value Chain Analysis, Industry Dynamics and Strategic Positioning

The Value Chain Analyser of the PrimeDSS has for goals:

- To evaluate the influence of industry dynamics.
- To determine strategic positioning of a firm.

The output of this tool will be a content strategic positioning brief (4/5 pages) with:

- A global market review
- A country review
- A sector review
- Case studies

Collaboration between actors of the value chain was suggested to pave the way for more vertical integration in the Spanish sector. Attendees could foresee an extension of their activities, although not including market-related operations.

High regulation of the **access to space** for Spanish aquaculture business.

Quota allocation is considered a critical factor for the catching fisheries value chain.

Catching fisheries sector shows a **high competition** over resources and markets, with Chinese companies playing an increasingly important role.



Unleashing Innovation: Matching Consumer Preferences to New Seafood Products

This tool aims to define target customers for new seafood products: working with product attributes (species, formats, claims, etc.) and firm information (markets, distribution, communication, etc.) the tool suggests:

- Ideal segment
- Firm/product characteristics to improve
- Estimation of market size

Results are based on consumer data resulting from an online survey done in July 2017 to 800 respondents per country in Spain, France, Italy, Germany and United Kingdom (a total of 4,000). The on-going analysis of the data showed 7 baseline segment identities among EU consumers: creative, socially conscious, healthy, self-efficient, convenience, taste and indifferent. Furthermore, results can be tailored according to product attributes introduced in the tool.

Companies know their position in the market, but a market-orientated tool will support them when **detecting new trends and competitors' behavior**.

Inputs & outputs suggestion: develop young people segment, claims on fair labour conditions for workers, other presentations such as sushi, and comparisons between national and local markets.

Many Spanish producers and processors **do not own a brand for its products**, therefore they are less interested on market information.

Emerging trends in the Spanish market: fresh products, chilled products, variable size of portions (fillets), young consumers, convenience lines or products with MAP (Modified Atmosphere Packaging).

PrimeFish focus species can be used as a proxy for similar species: e.g. herring results could offer hints on the mackerel

Launch of Prototype
Spring
2018

Interactive Workshops
with Stakeholders
Spring- Fall
2018

End of project
March
2019



Write us to apply for participation:
irg@primefish.eu
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