



SUCCESS

Strategic Use of Competitiveness towards Consolidating the Economic Sustainability of the european Seafood sector



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Aim of my presentation

- Brief presentation of the SUCCESS project
 - Make sure that you are aware of the project
 - Make sure that the project can be useful for you (esp. Industry, but also policy makers)
 - This is why some input is needed (especially regarding the NEEDS + example of the NTM work)

Consortium overview

- 3 years –start April 2015; end March 2018
- 4 Universities & 7 National Fisheries / Marine Institutes (data provision / 'EAFE – European Association of Fisheries Economists - network')
- 8 Industry partners (producers – fisheries and aquaculture; trading companies – 'real world tests')
- 5 Consultancy companies (market analysis; value chain; software / web)

+ Stakeholders (External Experts Advisory Board - EEAB; End-Users and Stakeholder Group - EUSG) → WP9, specific events, international conferences;

- Website: <http://www.success-h2020.eu/> (NB: page for Events)

Project general description - What is the project about?

From the TOR of the Call

- Improving the competitiveness of the European fisheries and aquaculture industries
- Increasing the value of European fisheries products
- Increasing the demand for European fisheries products

- What are the main objectives of the project?

- analyse the present and expected future bottlenecks for competitiveness of European fisheries and aquaculture sectors (= the challenges).

→incl. the identification of the industry / policy makers' needs

- investigate the potential for new markets and marketing tools to increase revenue

→incl. product differentiation / role of labels

- identify innovations to improve efficiency and reduce production costs

→incl. regulatory innovations (Example of Non-Tariff Measures)

Tracks for improving competitiveness of the European seafood sector - 1

- Improving the awareness (what is a 'good' fish?)

→ Consumer (B2C)

- Understanding and informing about the origin of the product
- Understanding and informing about the quality of the product (e.g. 'surimi – crab' products)
- Knowledge of how to use the product (e.g. Spider crab story; trials in Greece for testing new mussel products)
- Understanding the impact of collective representation on consumption patterns

→ Retailers; restaurants (B2B)

→ Policy makers (e.g. schools; army; canteens)

Tracks for improving competitiveness of the European seafood sector - 2

- Alternative / innovative markets (and potential role of 'quality' attributes, incl. sustainability dimensions - *See the Workshop on sustainable sourcing organised in Rome in May 2016*):
 - a/ Direct selling ('niche' markets – but big one)
 - b/ Export markets (e.g. Middle and Far East):

Illustration – Emirates Mall – King scallops – 170 AUD - 34 €/kg



Other examples



Tracks for improving competitiveness of the European seafood sector - 2

- Alternative / innovative markets:
 - a/ Direct selling ('niche' markets – but big one)
 - b/ Export markets (e.g. Middle and Far East):
 - c/ Investigating new European markets for (local) traditional products (e.g. plaice; mussels)

Tracks for improving competitiveness of the European seafood sector - 3

- Certifications schemes (*See the Workshop on sustainable sourcing organised in Rome in May 2016*)
- Denomination of origin
- Organic product
- MSC (sole, sardines...); Friends of the Earth; Global G.A.P), ASC
- Label Rouge (salmon; scallops)
- Local labelling schemes (<http://pointe-de-bretagne.fr/>; PescadeRias)

Tracks for improving competitiveness of the European seafood sector - 4

- Improving / promoting production methods
- New gears (incl. Switch in gear - sole netters)
- Aquaculture (trout, carp, mussel, seabream & seabass, shrimp - recirculation)
- Stock enhancement / Hatcheries (scallops; abalone in France; mollusc in Galicia)

Tracks for improving competitiveness of the European seafood sector - 7

- Improving (the efficiency of) regulatory frameworks / conditions
- Regulations regarding production methods
- Regulations regarding International Trade
 - identifying the cost of such regulations
 - identify / propose some alternative strategies (Best Practices)

What SUCCESS is expecting from you

- Identification of the key needs / challenges / opportunities
 - Make sure that the project is useful for stakeholders (impacts)
 - Avoid missing key issues
 - Online questionnaire (very easy) or email contribution or on paper
 - <https://docs.google.com/forms/d/152w1ls8ypXDcQys3m2YPkMwLA2cA86cix3PnRWBWuAU/viewform?c=0&w=1>

- Your views regarding Non-Tariff Measures
 - Impact of competitiveness
 - Potential for policy options
 - Online questionnaire using choice experiment approach
 - Participation in the NTM SUCCESS Workshop (October 2016?)

What will you get from this collaboration

- Make sure that your voices / concerns / ideas are taken into account by the project
- Contribute to the design of policy recommendations
- Share best practices and benefit for sharing 'efficient' practices (*the SUCCESS Stories films*)