

EMFF Operational Programme 2014-2020 Seafood Processing Development Measure

BIM Development & Innovation Services

Seafood Scaling & New Market Development Scheme Work Programme Projects

Final Report 2021

BENEFICIARY: Bord Iascaigh Mhara
PROJECT REFERENCE NUMBER: 21/SSMDS/DIS-BG022-BR029
NAME OF PROJECT: **Whitefish Strategy Development**
IMPLEMENTATION PERIOD: 1st January to 31st December 2021

Project Scope

The whitefish sector's stated objective is to reduce the amount of fish traded on the commodity markets in a whole state and to increase opportunity to add value to the catch. The sector is commonly described as fragmented and overly dependent on the commodity/spot market with a lack of in-depth understanding of market needs regarding product attributes throughout the supply chain.

Attributes of sector species differ but due to the challenges, faced by all actors along the chain, there is a greater need to understand the opportunity to add value and define the issues and barriers that exist through:

- greater understanding of the supply chain,
- alignment,
- better market data and engagement in a strategy formulation, and
- implementation to help preserve and grow the sector.

In order to address this, BIM aimed to facilitate the whitefish sector towards development of a strategy, obtaining engagement and buy in, by undertaking:

- a deep engagement process with industry,
- mapping the supply chain,
- defining sector barriers and challenges to value creation, and
- gaining a clear understanding of product attribute's role in value erosion or creation.

BIM, in turn, will utilise this engagement process to validate that the issues and challenges faced by the sector are aligned with its service and support offering and refining these as appropriate.

Objectives

With industry engagement a key component of the project, the objectives are as follows:

- Retention of a third-party facilitator to lead industry engagement, and to validate and collate sector feedback in partnership with BIM.
- Engage the industry in appropriate forums to validate and seek consensus.
- Situational analysis of current industry data.
- To map the sector supply chains for key species (whiting, haddock, hake, monkfish, megrim).
- Define barriers or issues impacting value creation - validated and prioritised with industry - with a view of future trends.
- Focus on product attributes and development to facilitate differentiation and movement away from commodity markets.
- Support the sector to develop a sector strategy and identify an implementation plan in line with industry, third party facilitator and BIM findings.

Budget

€160,000

Achievements/Spend

- Appointed MCCP as third-party facilitator to develop strategy and implementation plan.
- Developed a set of hypotheses based on data trawl and internal interviews to test with industry.
- Conduct over 50 industry interviews incorporating all elements of the supply chain.
- Identified data gaps in value chain analysis across the six primary species.
- Developed and validated seven sectoral issues based on industry feedback.

Summary of Spend	
Total Approved	€160,000.00
Total Eligible Expenditure	€155,635.00
Total Drawdown	€155,635.00
EU – 50%	€77,817.50
Exchequer – 50%	€77,817.50

Report by: Vincent Ryan

Date: 22nd February 2022