

## BIM EMFAF Work Programme Project Report 2023

<b>BENEFICIARY:</b>	Bord Iascaigh Mhara
<b>PROJECT REFERENCE NUMBER:</b>	23/SPIS/DIS-BG011-BR062
<b>NAME OF PROJECT:</b>	<b>Innovative Supply Chain Technologies</b>
<b>IMPLEMENTATION PERIOD:</b>	1 <sup>st</sup> January to 31 <sup>st</sup> December 2023

### Project Scope

The Innovative Supply Chain Technologies project looked at three market channels to determine if there were opportunities to gain further value through technologies, market insights and supply chains. The market channels investigated were: prawns into the Italian market, hake into the Spanish market, and seafood in the Irish food service market.

Prawns are a prime seafood with a value of €53m sold predominately as frozen commodity through agents into the international market in Italy and Spain. The changing competitor landscape presents rival competition from Argentinian prawns as a comparable product offered at a lower price point. The project scope included the identification of opportunities for Irish prawns to add value and differentiate from competitors through the supply chain.

Hake as a high-volume, lower price species has a value of €10m and is sold as a fresh whole product into commodity auction markets in France and Spain. There is direct competition from Chilean and Namibian hake which is presenting at a lower price point depressing commodity price downwards. This requires the identification of opportunities for Irish hake to add value through the supply chain. The specific focus was on frozen formats, understanding the supply chain, and identification of key competitors.

The food service value of the Irish market for 2022 is valued at €8.245 billion with seafood comprising a value of €169 million. This project scope assessed the opportunities to supply seafood product formats that address the skills shortage within hospitality, and the need to deliver value add seafood products to meet that sector changed needs so that seafood is competitive as a protein offering in food service.

### Objectives

The key project objectives for 2023 in seafood supply chain technologies was:

- To assess international competitor products and specifications and possible market channels for added value prawns into the Italian market.
- To assess international competitor products and specifications and possible processing technologies for added value hake into the Spanish market.
- To assess the status of the seafood category within the Irish food service sector and possible opportunities for added value product as a protein offering through the food service sector.



## Outcomes

The key project outcomes in seafood supply chain technologies were:

- Report on international competitor products and specifications for prawns in the Italian market. This included product retrieval, brand parameters and in-market supply chain logistics. The report identified an opportunity for collaboration by the Irish sector and building towards a premium value proposition with in-market partners. The information will be shared with stakeholders in quarter one of 2024.
- Report on international competitor products and specifications for hake in the Spanish market. This included product retrieval and in-market supply chain logistics. The report identified challenges in the frozen format with substitute products dominating at significantly lower prices. The information will be shared with stakeholders in quarter one of 2024.
- Report on the status of the seafood category within the Irish food service sector. This included perspectives from suppliers, buyers, and food service outlets. The report identified a significant gap in knowledge from the food service sector of matters attaining to quality, seasonality, sustainability, and species diversification. The information will be shared with stakeholders in quarter one of 2024 and the development of support for the food service sector to build their seafood knowledge base.

## Summary of Project Spend

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Total Approved Costs	€90,000
Total Eligible Expenditure	€86,795
EMFAF Eligible Expenditure	€43,397
Exchequer	€43,397

Report by: Paul Ward

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Government of Ireland



Arna chomhchistiú ag  
an Aontas Eorpach

Co-Funded by the  
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