



Deliverable Report

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|-----------------------------|--|-------------------------------|------------------------|--------------|
| Deliverable No: | D31.27 | Delivery Month: | 59 | |
| Deliverable Title | Promotional workshops for specialized audience in fish market sector (Spain, Greece, UK or Italy) (4th workshop) | | | |
| WP No: | 31 | WP Lead beneficiary: | P18. CTAQUA | |
| WP Title: | Dissemination | | | |
| Task No: | 31.6 | Task Lead beneficiary: | P18. CTAQUA | |
| Task Title: | Promotional workshops | | | |
| Other beneficiaries: | P3. IRTA | P6. SWR | P11. AU | P12. APROMAR |
| | P33. FGM | | | |
| Status: | Delivered | | Expected month: | 55 |
| | | | | |

Lead partner preparing the deliverable: Robles, R. (CTAQUA).

Other partners participating: Maria Banovic (AU), Luis Guerrero (IRTA), Gemma Tacken (SWR), Javier Ojeda (APROMAR), Ioannis Pelekanakis (FGM).

Objective: to promote project activities and results focused on specific audience, such as fish producers, processors and retailers, consumer organizations, and fisheries and aquaculture authorities.

Description: During the last two years of the project, specialized one-day workshops have been organized in specific countries where fish production and processing are relevant economic activities. The workshops are designed for specific audience, such as fish producers, processors and retailers, consumer organizations, and fisheries and aquaculture authorities.

Initially four countries were listed in the DOW as relevant locations for the organization of this activity: Spain, UK, Italy and Greece. From these locations, UK has been changed for Germany due to market and consumer reasons (for further information, please see D 31.16 1st Promotional Workshop in Bremen).

The 1st Promotional Workshop was held at the FAIR BREMEN (Messe Bremen), Business Lounge (Hall 7, 1st floor), Theodor-Heuss-Strasse in Bremen, Germany the 24th of May 2017. This promotional workshop has been already reported as D 31.16.

The 2nd Promotional Workshop was organized in Spain, at the facilities of the P18. CTAQUA located in El Puerto de Santa María, Cádiz, Spain the 28th of September 2018. The report on this 2nd Promotional Workshop has been already delivered as D 31.18.

The 3rd Promotional Workshop was organized in Verona, Italy, which is the location of the headquarters of the Italian fish Producer Association (API, Associazione Piscicoltori Italiani in Italian), the 22nd of February 2018. This promotional workshop has been already reported as D 31.23.



The 4th Promotional Workshop was organized in close collaboration with the Federation of Greek Mariculture (P.30) in the meeting room Syntagma of the Hotel Central, 21 Apollonos str. Athens, Greece. The meeting was attended by 22 people, including sales responsible from the main aquafarms in Greece, fish farmers, universities and administration representatives (**Figure 1**)..



Figure 1. View of the Syntagma meeting room during the presentations.

The meeting started with an update of the project achievements in all the research areas, presented by the Dissemination leader, Rocio Robles from Ctaqua (P.18), Spain. Five more presentations from the DIVERSIFY partners provided the background for the following debate.

The second talk was given by the manager of FGM (P.30), Ioannis Pelekanakis, who provided an interesting overview of the aquaculture production in Greece (**Fig.2**). Next presentation entitled “Current Opportunities and Challenges for Consumer Acceptance of Aquaculture Products” was given by Marija Banovic, (P.11), MAPP Centre, Aarhus University, Denmark. Some important aspects on the consumer behavior were highlighted. Likewise, a remarkable question is the fact that every year there is more than 2.500 new fish products appearing in the market which questions how visible any aquaculture product can be in the fish market product (**Fig. 3**).

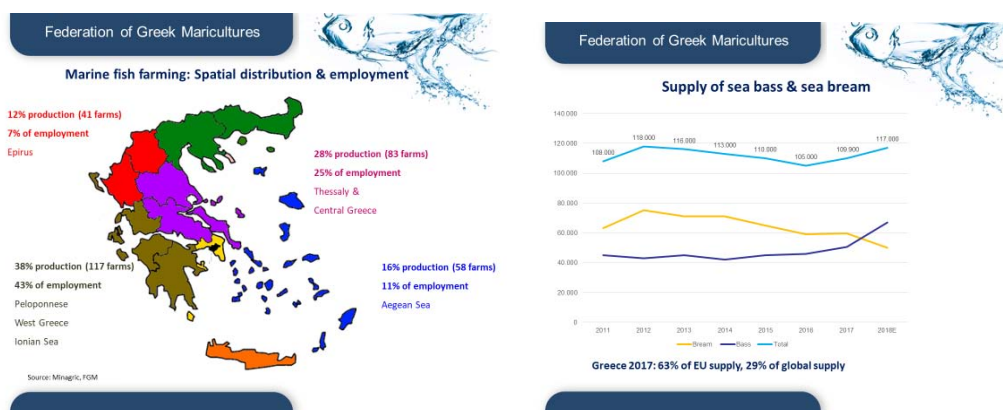


Figure 2. Representative slides from the talk given by Ioannis Pelekanakis (FGM, P.30) showing the spatial distribution and employment generated by the aquaculture industry in Greece (left) and the market share of farmed fish from Greece in EU and in the world.



AQUACULTURE PRODUCTS (IN)VISIBLE?



Figure 3. Slide from the talk given by Marija Banovic showing the amount of new launched fish products per year (left) and the consumer preference for farmed or wild fish products.

The third presentation entitled “Traceability, labelling and certification of aquatic products” was given by Javier Ojeda from Apromar, Spain (P.12) followed by the talk of Luis Guerrero from IRTA, Spain (P.3), titled “ What do consumers think about aquaculture fish and the products made from it?”. In this presentation, it was shown that sensory dimension seems to have an important contribution to the overall acceptance of the product and to its purchase probability, among other conclusions included in the slide with the “take home message” (Fig. 4).

Last talk “Competition, trends and critical success factors for new aquaculture species” given by Gemma Tacken from the Stichting Wageningen Research (Wageningen, The Netherlands) (P.6). Business models for some of the products developed in Diversify, namely smoked thin fillet of grey mullet, fresh fish steak from greater amberjack, fish fillet of pike perch and fish burger from meagre, were presented (Fig. 5) and commented in detail.

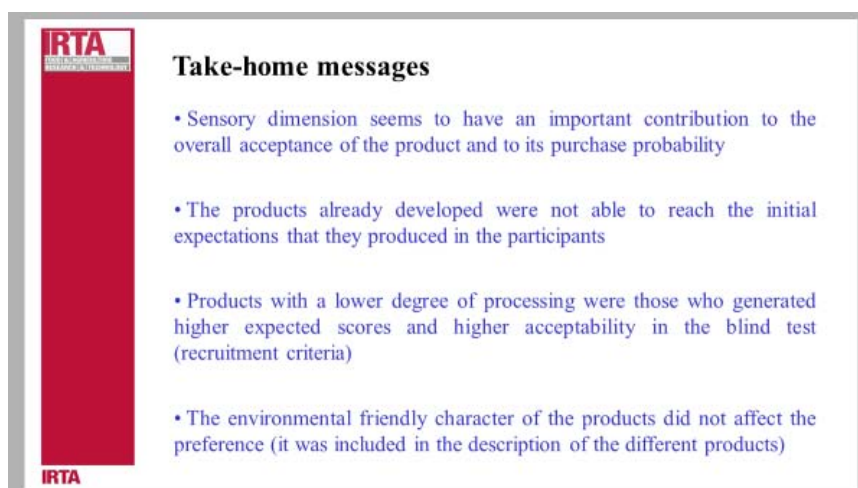


Figure 4. Summary slide from the presentation of Luis Guerrero with the main conclusions of the work presented at the 4th Promotional Workshop in Athens.

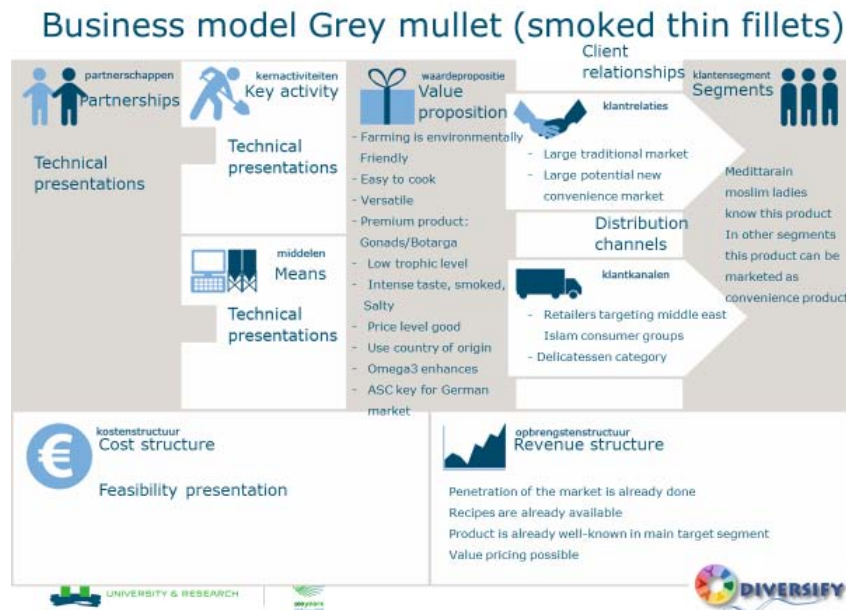


Figure 5. Slide showing the Business model scheme for the grey mullet product "smoked thin filet".

The presentations were followed by the debate "Consumer attitude to diversification in aquaculture fish products: trust of consumer in aquaculture products, sustainability and health-related behavior" which was moderated by Rocio Robles (CTAQUA) y Gemma Tacken (SWR). The debate counted with the active participation of the audience that raised interesting questions on marketing of aquaculture products.

The companies in Greece see market opportunities mainly with greater amberjack, since it is unique, and also with meagre. However for grey mullet, there were doubts whether the fileting yield could make the processing of the species profitable. Rocio Robles explained that grey mullet of approx. 2 kg yielded 40% filet. This data was obtained during the processing of grey mullet to develop the new products from this species in the framework of the project activities. The audience transmitted their interest in the feasibility study for this species.

There was a question from the audience about other areas in Europe than Mediterranean areas where greater amberjack was farmed. Rocio Robles indicated that one Danish company has started greater amberjack (*Seriola lalandi*) in RAS systems.

Marketing results presented during the workshop were very appreciated by the companies present in the audience. The idea of developing Blue next to Green was considered as an important outcome of the day. Next to that taking competitors of other proteins into consideration in positioning was also valuable. We emphasized that country of origin could give added value, although the choice to be considered is or EU or Greece. Gemma Tacken indicated that consumers consider themselves as inhabitants of a country and sometimes even as inhabitant of a region. So country labelling is potentially more valuable for the local Greek consumer. However, some regions are connected by consumers to a great positive experience (holidays) and remembering, which can promote that Greek fish could have added value in northern European countries too, since people make the holiday connection. We see that this type of experiences-region-connection works for pasta, pizza and olive oil.



There was also a question from the audience related to the possibility to set an import-tariff on imported products but we consider that the effect would be only temporary and it is a negative stimulation of the demand so it is better to positively stimulate product demand.

When analysing the different products developed in Diversify, fish-burger with the shape of a fish is considered more interesting product than the fish-sticks; however children in general love fish sticks. Fish-burger with the shape of a fish is a healthier alternative: it has omega 3 fatty acids and does not include non-protein ingredients (excess of breadcrumbs in fish sticks).

Concerning some of the most important characteristics of fish products, taste which is considered one of the most important characteristics to keep in the market, has to be taken into consideration by the fish farmer. Pangasius products were brought to the discussion: how is possible that a fish product with no fish taste can be successful?. Some consumers prefer the neutral taste (i.e children, no fish-eating consumers...). The participation of popular television figures such as chefs in television programs has shown to be a powerful tool to promote the consumption of certain types of foods. These type of marketing tools were also discussed during the debate. During the debate some further questions on fish farming were related to the incorporation of alternatives sources of protein in fish feeds (i.e. insect meal, single cell protein, macroalgae etc...).

The Species Seminars were also presented during the debate. The audience was very interested in this type of knowledge transfer. Frequent visit to our web site was indicated as the best way to be updated on these events (<https://www.diversifyfish.eu/species-workshops.html>) .

We ended the workshop with a degustation *in situ*, of grey mullet filet preserved in olive oil and canned meagre paté prepared by CTAQUA and IRTA respectively (new fish products developed within the DIVERSIFY project) (**Fig.6**).



Figure 6. Attendees during the degustation (left) of grey mullet filet preserved in olive oil and canned meagre paté (right) prepared by CTAQUA and IRTA respectively.

The agenda of the event was distributed to fish farmers, fish processing and fish industry stakeholders in Greece by the FGM (P30) as well as to the members of the Federation. The event was organized including six presentations from DIVERSIFY partners.

The invitation sent to the participants including the agenda of the event is included below.



DIVERSIFY 4th Promotional Workshop 11th July 2018

Diversification of fish markets through aquaculture

On behalf of the **DIVERSIFY** project consortium, we would like to invite you to the 4th Promotional Workshop on July 11, 2018 at the

**Federation of Greek Maricultures
Hotel Central, Room *Syntagma*
21 Apollonos str.
Athens, Greece**

This is a half-day workshop intended to disseminate the project results and to provide a forum for discussion on market and consumer attitude towards aquaculture products. The meeting is hosted by the DIVERSIFY partner, Federation of Greek Maricultures, Greece.

WORKSHOP AGENDA

09:00 *Welcome and registration.*

09:30 *Presentation of the Project DIVERSIFY.* Rocío Robles. Dissemination leader DIVERSIFY. CTAQUA. Spain

10:00 *Aquaculture production in Greece.* Yannis Pelekanakis, FGM Manager, Greece

10:30 *Current Opportunities and Challenges for Consumer Acceptance of Aquaculture Products.* Marija Banovic, MAPP Centre, Aarhus University, Denmark.

11:00 *Coffee break*

11:30 *Traceability, labelling and certification of aquatic products.* Javier Ojeda, APROMAR, Spain



12:00 “ What do consumers think about aquaculture fish and the products made from it?”.

Luis Guerrero, IRTA, Monells, Spain.

12:30 Competition, trends and critical success factors for new aquaculture species. Gemma Tacken (Stichting Wageningen Research, Wageningen, The Netherlands)

13:00 DEBATE:

Consumer attitude to diversification in aquaculture fish products: trust of consumer in aquaculture products, sustainability and health- related behavior.

- **Moderators:** Gemma Tacken (SWR) and Rocio Robles (CTAQUA)

14:00 PRODUCT DEGUSTATION

Following the debate, some DIVERSIFY products elaborated with **Grey mullet** (*M. cephalus*) and **Meagre** (*A. regius*) will be offered for *in situ* degustation

Please reply by sending us your name and the name of your company by E-mail to the following address:

FGM

Tel. +30 210 3212224

E-Mail: fgmgen@gmail.com, ipelfgm@gmail.com

Mob. +306945 910491

We are looking forward to meet you for an interesting exchange of news.

With kind regards

Rocio Robles
Dissemination leader

Yannis Pelekanakis
Project partner and local organizer

Address: Central Hotel, Apollonos 21, 10557 Athens



Co-funded by the Seventh
Framework Programme
of the European Union



As we have seen in previous Promotional Workshops, the sector needs guidance on correctly design their marketing campaigns. Questions related to this matter are recurrent in the debates.



Deviations: The deliverable is submitted 4 months later than anticipated in the DOW although it keeps the time range interval with the previous Promotional Workshop included in the DOW.



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ANNEX I



ctagua

CENTRO TECNOLÓGICO DE LA ACUICULTURA



4th Promotional Workshop DIVERSIFY

Athens, 11/11/2018 - Central Hotel - 9:00-15:00

| COMPANY | ATTENDING | ADDRESS | TELEPHONE (+30) | EMAIL | SIGNATURE |
|---|----------------------------|---|--|---|-----------|
| 1. HELLORISH - ΒΙΤΣΑΚΟΣ ΑΩΜΑ ΠΑΝΑΓΙΩΤΗΣ ΒΟΥΛΑΣ | | 35012 Larnaka Hithode | 6075 738712 | d.bouker@hellorish.eu | |
| 2. SEICHONA SA | Soteriough Vasilis | Lefkora Eritras 36, 151, 25, Marouli, Athens, Greece | 210 37 24 900 (for 900), 697 20 23 137 | SULO.D@GCL.BE.LONDA.GR | |
| 3. SEICHONA SA | ZAFIRIENIA KALIANA | Lefkora Eritras 36, 151, 25, Marouli, Athens, Greece | 210 37 24 900 (for 900), 697 20 23 137 | Kaliana_Z@seichona.com | |
| 4. Andreonida S.A. | ACHILLEAS PAPADOPPOULOS | L. LAVRIOU 99C, 15002 PALLANIA, ATHENS GREECE | 210 66 49883 7 (ext. 211), 6945 89750 | achilleas.papadopoulos@andreonidagroup.gr | |
| 5. Andronida S.A. | Michaili Soudis | L. LAVRIOU 99C, 15002 PALLANIA, ATHENS GREECE | | msoudis@andreonidagroup.gr | |
| 6. Andronida S.A. | Penny Balabanis | L. LAVRIOU 99C, 15002 PALLANIA, ATHENS GREECE | | PBALABANIS@ANDREONIDAGROUP.GR | |
| 7. Kefalonia Fisheries SA | YIANNIS KRONTHRA | 23 Reghis Str., 10674 Athens, Greece | 2107243060, 6948443382 | ykronthra@kefisa.gr | |
| 8. NIREUS AQUACULTURE S.A. | Theodoros Alexopoulos | 181 km, Koropou-Varis Ave., 15400 Koropou-Attica, Greece | 210 66 59 305, 697 66 59 305 | talalex@nireus.com | |
| 9. NIREUS AQUACULTURE S.A. | Alexandros Stamatiliu | 181 km, Koropou-Varis Ave., 15400 Koropou-Attica, Greece | | A.STAMATIOLI@NIREUS.COM | |
| 10. FOGA | I. FIEDJANAKIS | L. VOULAMENIS 517, 15041 LICOPIPOLIS, ATHENS GREECE | 2303212224, 696910491 | iefiedjan@mail.com | |
| 11. FOGA | M. AMANANICOU | L. VOULAMENIS 517, 15041 LICOPIPOLIS, ATHENS GREECE | 2103212224 | amananico@fogagroup.gr | |
| 12. EGOFF | I. BOGDANOU | ZAKROSTA 44 & PIRSAIS AVE., 15293 OIKALIMENI, ATHENS GREECE | 6963635319 | ibogdanou@hifionegreece.com | |
| 13. APC SA | CHESTIS AMANICPOULOS | MINGIHELIS 1, 10556 ATHENS GREECE | 2103212933 | amanicp@apc.gr | |
| 14. MENOITY OF NAVAL DEVELOPM. ISOPIA, SAGAROLA | SPYRIDO 150, ATHENS GREECE | SPYRIDO 150, ATHENS GREECE | 2109397191 | STG125@MNAVAGRIE.GR | |
| 15. NATIONAL TECHNICAL UNIV. THESSALIA THESSE | ATHENS GREECE | ATHENS GREECE | | TSORNI@CHEM.HTIUA.GR | |



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|----|--|---------------|-------------------------------------|--|
| 16 | CTAQUA | NICOLÒ HOBLES | SPAIN | |
| 17 | APHIONIAK | JAVIER ORDOÑA | AYTO 206 11130 ORCIJANA CAJIZ SPAIN | |
| 18 | MARIT CENTRE, MARINUS UNIV, MARJIA BANSOIC | | DENMARK | BARCELUS@CTAQUA.ES OLENA@APHIONIAK.ES |
| 19 | STICHTING WAGENINGEN REEF, GEMMA TACKEN | | THE NETHERLANDS | MANAGEMENT@ALLOK |
| 20 | HIVA | LUIS GUERRERO | MONTELU SPAIN | GEMMA.TACKEN@WUR.NL LUIS.GUERRERO@HIVA.ES |