

ON- & OFFSHORE INCUBATOR AND LIVING LAB





The challenge

**Dynamisation of traditional
fisheries through integration
of complementary
aquaculture and innovative
fishery techniques**

An overview of the Belgian fishery sector

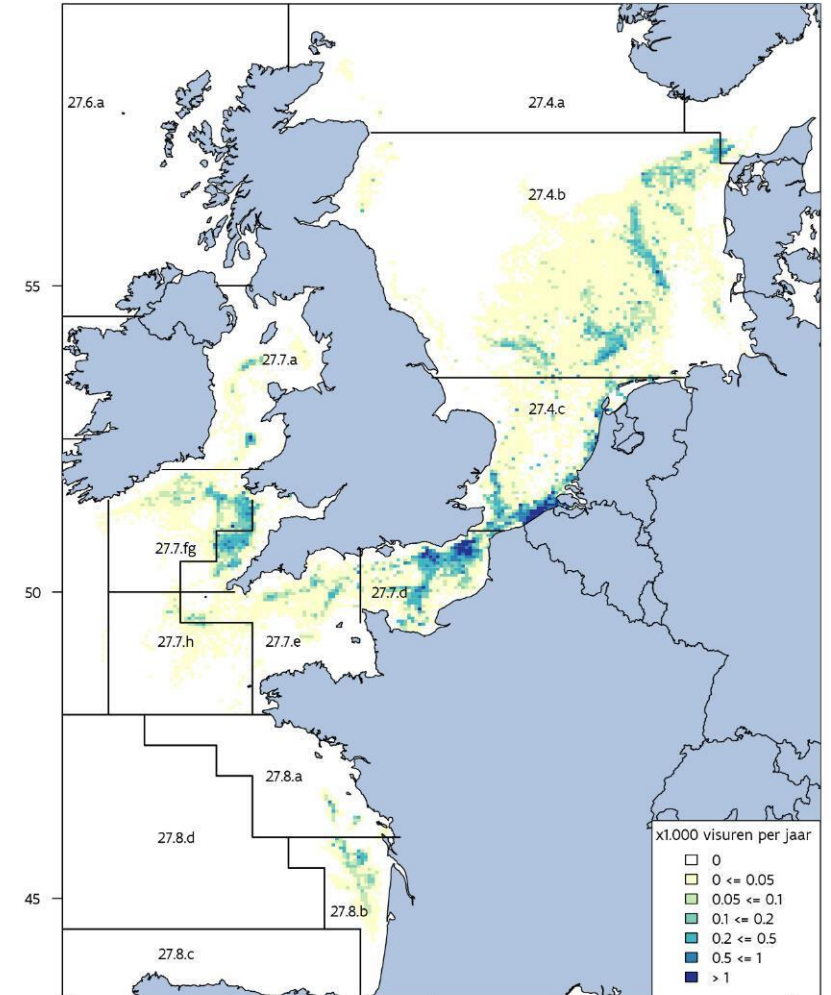
- The Belgian fleet consists out of 64 vessels – mainly beam trawlers
- The fishing grounds are rather distant due to our small coastal line
 - 55% is in British waters
 - 45% in EU waters

- The main species are

- Dover sole
- Ray
- Plaice
- Squid
- ...



- 95% of the fleet lands in 2 main homeports
 - Zeebrugge
 - Ostend





The Fishery ports Zeebrugge & Ostend



Ostend

- New warehouses for vesselowners since 2015
- Renewed fish auction since July 2019
- EFRO Incubator for mariculture under construction
- 40 fish related companies on site
- Dynamisation of the site since 2010



Zeebrugge

- New fishery cluster in the innerport since 1992
- 80 fish related companies on site
- Development of food logistics in relation to fishery and the commercial port

Direct employment on the 2 sites: around 1500 people

Some challenges in the traditional fishing sector



- Structurally declining volumes arrive at Belgian ports
- Weighing obligations in European ports and Brexit create uncertain and unstable supply with impact on the entire chain
- Increasingly strict traceability rules put high pressure on current operations
- Gigantic downsizing of the European fleet ongoing
- Succession problems with crews and shipowners
- The North Sea is highly demanded for Nature preservation and human activities
- Huge know-how and expertise available in the city & region which is getting lost



Brexit: an impactfull UK decision

British Waters:

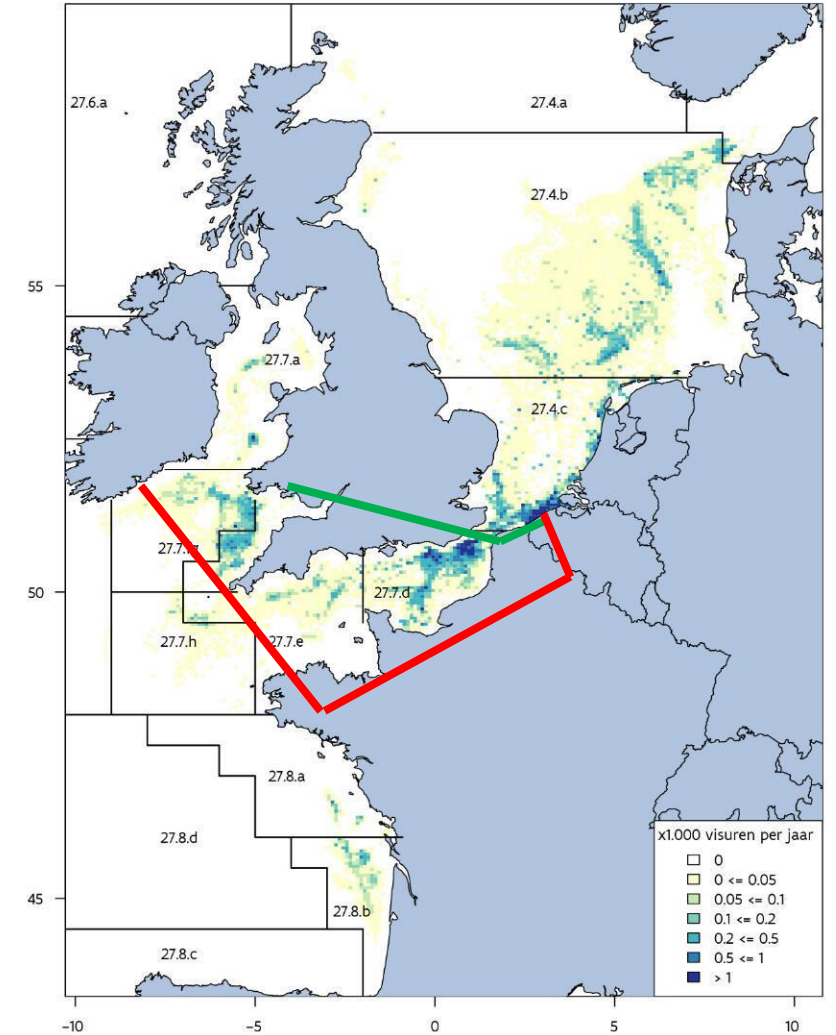
- 55% of the Belgian Catch in Value
- 80% of the turnover of the Flemish Fish Auction

Higher costs for lower quality:

- Landing in Republic Ireland to avoid “third countries” sanitary and customs control
- Ferries are weather sensitive and slow
- Total leadtime: 36 hours compared to 13 hours pre-Brexit

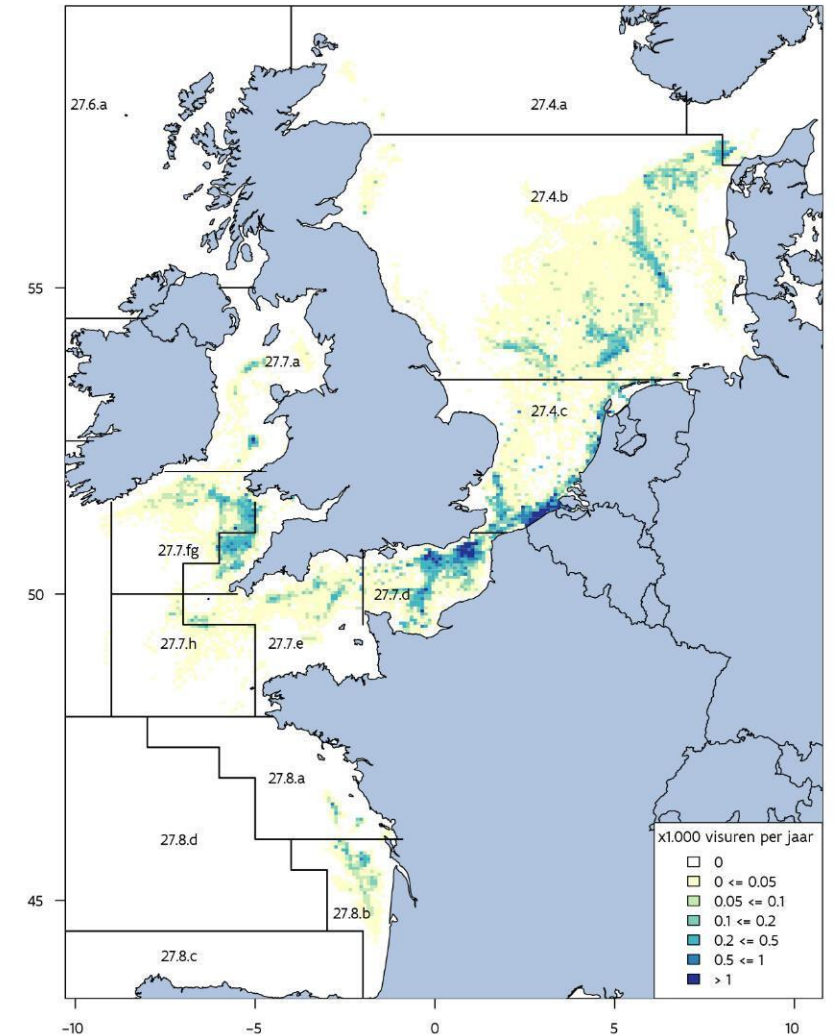
“WE TAKE BACK CONTROL” dixit Boris Johnson

- 25% loss of quota for the EU fleet over time
- Red Tape after 2026?



European regulation disturbs long lasting supply chains

- Belgium has a 63km coastal line and very distant fishing grounds
- The fish is landed in distant fishing ports and transported by truck
 - Limited carbon foot print
 - Better quality protection of the fish
 - **80% of the fish is landed in foreign ports (DK,NL,FR,IE)**
- The weighing duty in the first port of Entry forces fishermen de facto to sell in the auction nearby the fishing grounds in Northern countries
 - Direct impact on the available quantities for the Belgian Food Chain

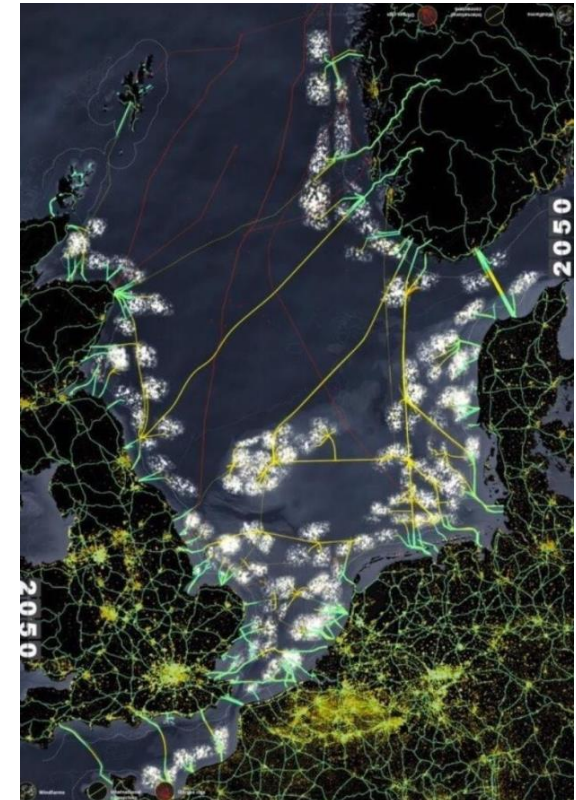


High focus on blue economy rather than traditional food supply



FOD Volksgezondheid

- The Belgian North sea is highly demanded for all kind of human activities
 - 7% off shore wind energy already constructed
 - Princess Elisabeth zone to be developed – another 7 to 10%
 - +35% Habitat 2000 – nature preservation
 - Dredging zones, sand winning zones
 - Industrial development zones (aquaculture,...)
 - Corridors to Antwerp, Zeebrugge, Rotterdam



2050 - An Energetic Odyssey door H+N+S
Landschapsarchitecten, Ecofys en Tungsten Pro

- Renewable Energy goals of the EU: the Green deal
- The Northern European Countries (BE, NL, DK, UK, FR,...) want to create the largest renewable energy production site in the North Sea
 - 2.600 wind mills today
 - 30.000 planned for 2050
- The historical fishing grounds around sand banks are most popular sites for windparks
- Multi-use in windparks is highly uncertain for fisheries
- The impact on the marine eco-system needs more scientific research



European Food Centre & Vlaamse Visveiling

A tradition in pioneering in the fishery sector

- 1992: New modern auction building and fish cluster in the innerport of Zeebrugge
- 1997: First internet auction and Quality Index Method for distant buyers in Europe
- 2011: Solar panels to partly provide renewable energy
- 2012: New auction system and cooperation between the 3 auctions in Belgium with common guarantee management
- 2017: Track & trace system from Auction to the buyers with RFID systems in the fish boxes
- 2019 ...: Active promotion of cooperation throughout the sector
- 2020: Up to 65% renewable energy out of windenergy
- 2023: Expansion of renewable energy up to 85%

- 2023-2024: Construction of the Marifish Aquaculture platform with seawater availability on-shore
- 2023....: Creation of Marifish.INC the incubator for start-ups and scale-ups in innovative Fishery and Aquaculture



MariFish.Inc

THE INCUBATOR
FOR START-UPS AND SCALE-UPS
IN INNOVATIVE FISHERY & AQUACULTURE



Gefinancierd door
de Europese Unie
Brexit Adjustment Reserve



Aquaculture venture: entrepreneur's perspective

- Availability of necessary resources:
 - Land, water, infrastructure
 - Financial support
 - Access to markets
 - Value add
 - Capacity building: entrepreneurial skills and aquaculture expertise
 - Permitting



The fishery port in the hearth of Ostend Port

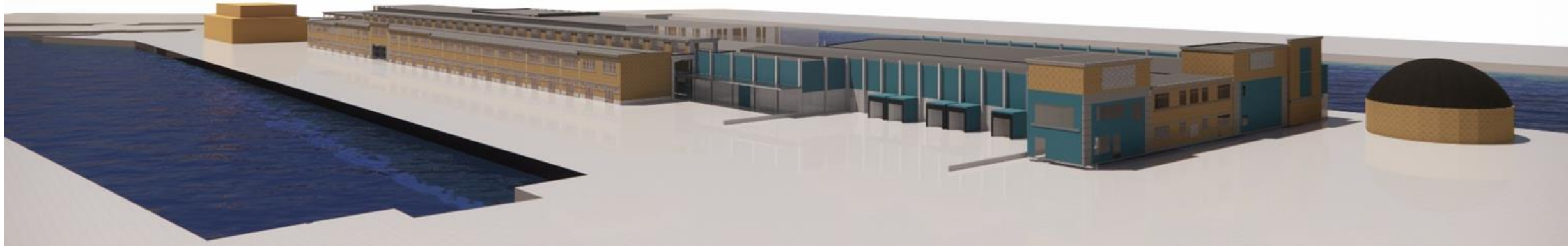




The fishery port of Ostend: all ingredients for a successful mix of traditional fishery and Aquaculture

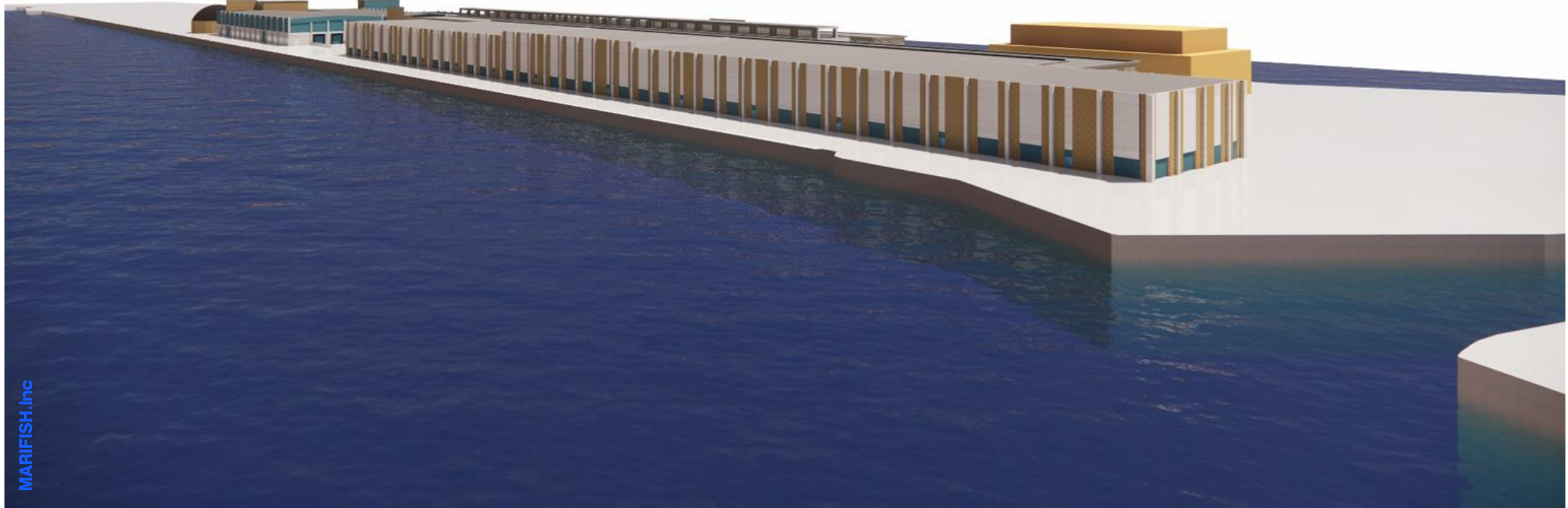
- Still water dock with very accessible lock
- Quiet water for efficient unloading of vessels
- Easy connection with European highway network
- New Fish Auction – low threshold infrastructure with sea-water
- 30 + fish related companies on site
- All stakeholders regularly on site
 - Suppliers
 - Buyers
 - Processors
- Set up of the Marifish.inc incubator
- Surrounded by world class scientific institutes: Ugent, ILVO, VLIZ







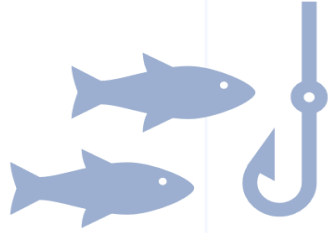
On- and offshore incubator and living lab



MARIFISH, Inc



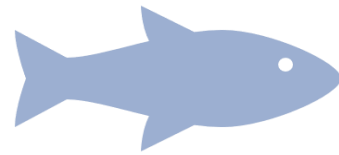
MariFish.Inc incubator *core domain*



Developing and scaling up innovative fishing techniques and on-board digitalization



Local development of alternative marine proteins



Opening up traditional fisheries to aquaculture both onshore and offshore

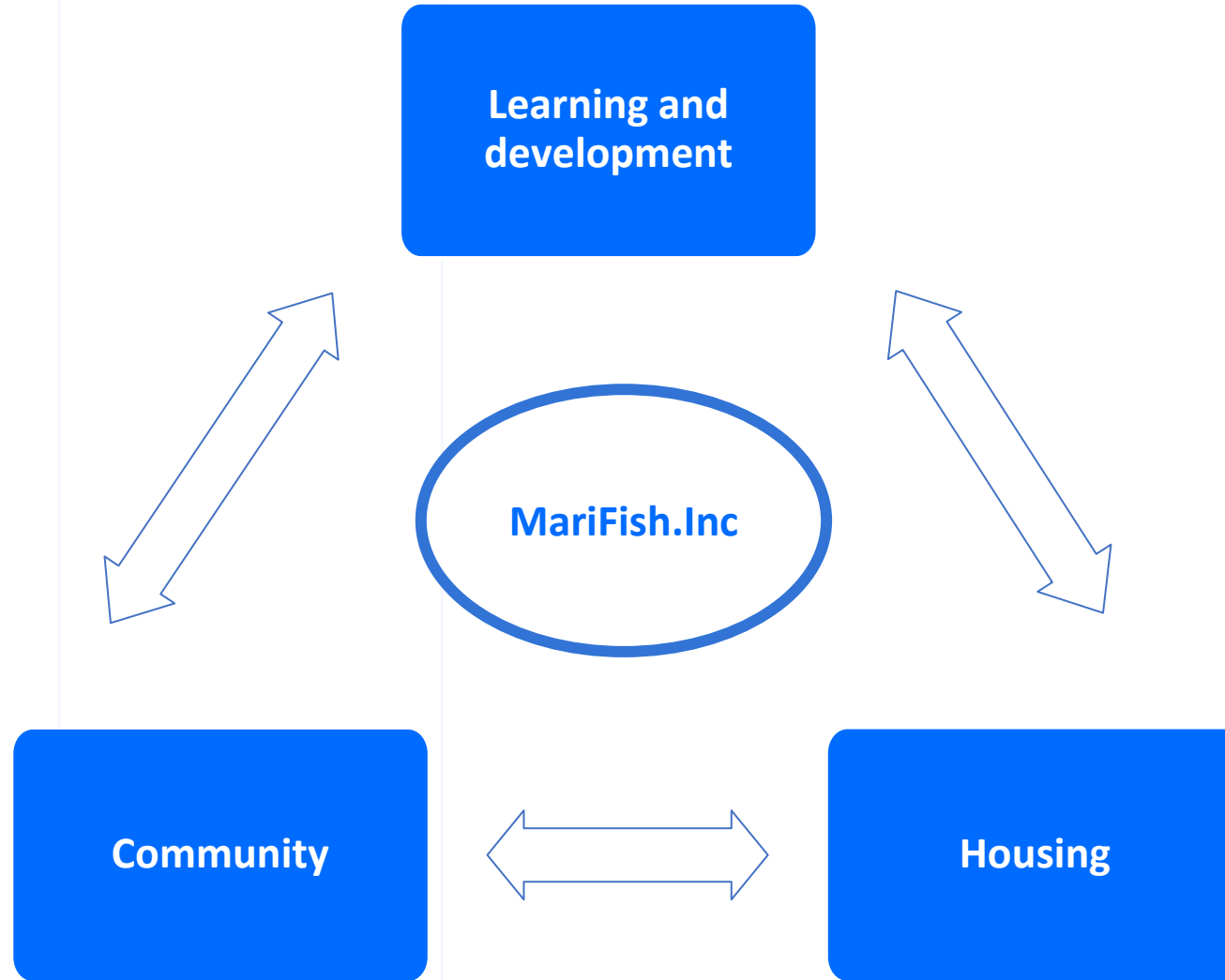


MariFish.Inc goals

- MariFish.Inc's **mission** is to **bundle the vast maritime knowledge** in Ostend into a growing **ecosystem** where traditional and innovative sectors meet in a new dynamic
- MariFish.Inc aims to contribute to the **sustainable seafood production** activities at sea in **synergy** with existing sectors
- Thanks to its location in Ostend's fishing cluster and the **presence of seawater infrastructure** on site, ideas can be **immediately tested in practice**
- The ultimate goal is to attract and support **entrepreneurs, talent and investors** in aquaculture & fisheries and maritime services

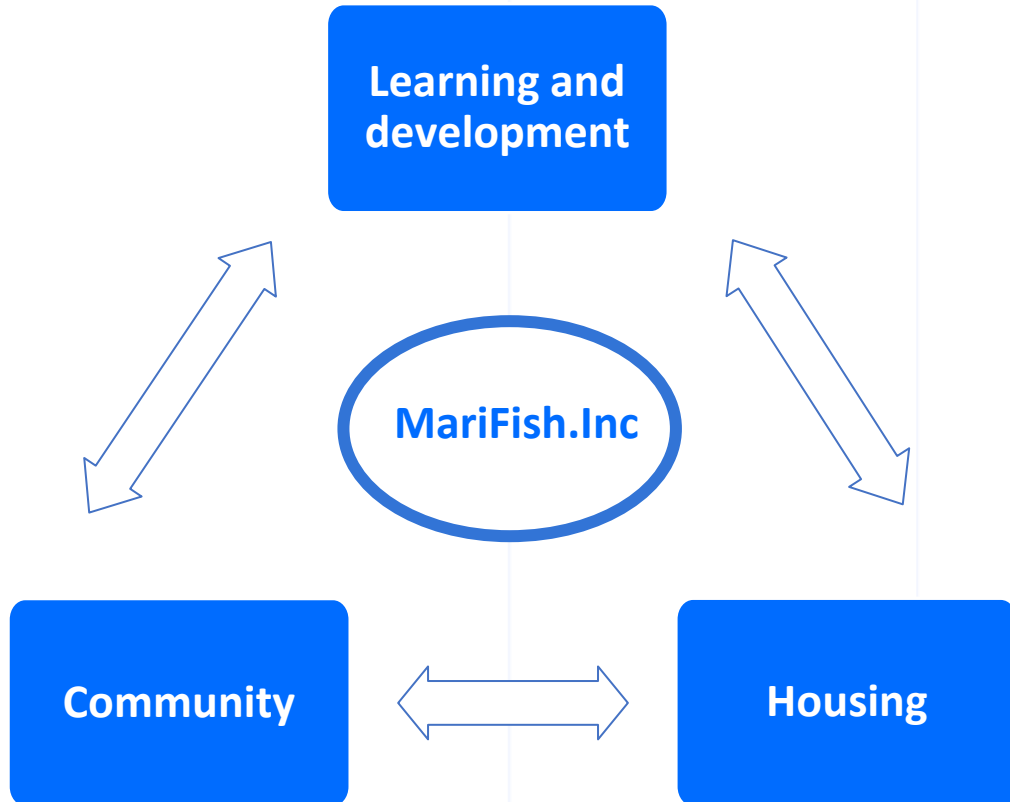


Value proposition MariFish.Inc?





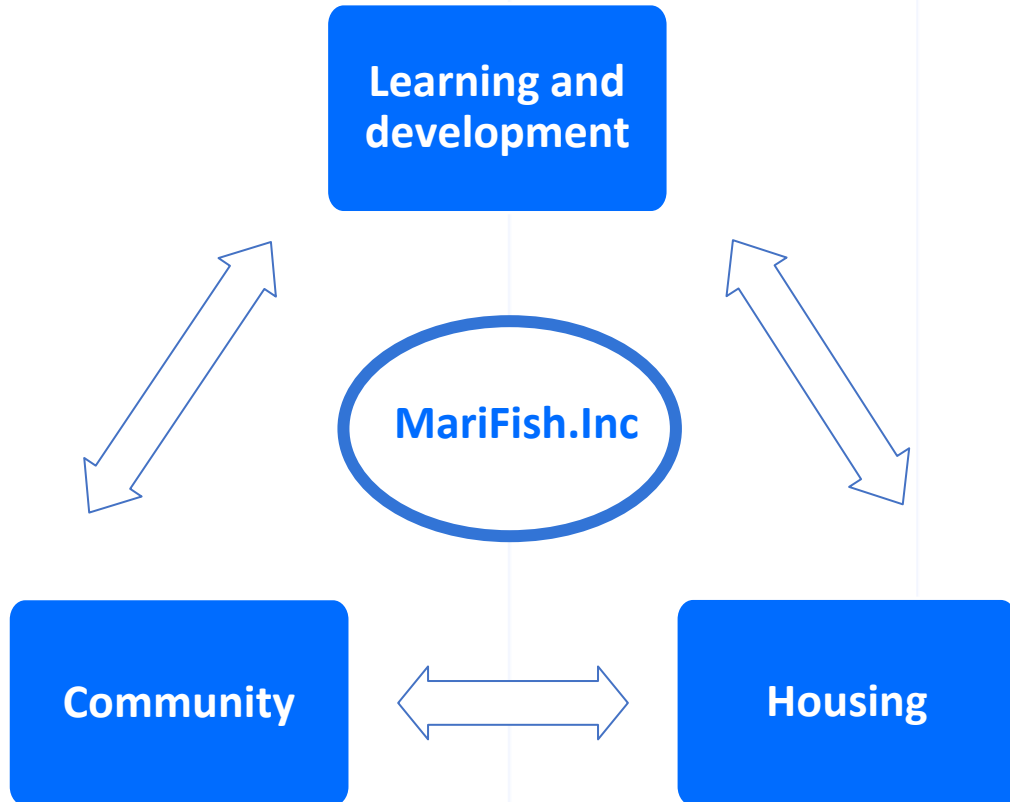
Target tenants



- A seat is a workplace taken by a **founder** (and its team) of a (early stage) start-up or scale-up
- The aim is to attract dynamic young projects with **ambition in aquaculture activities and innovative fisheries**
- Being open to **coaching** is an essential condition to qualify for housing in the incubator
- Users must contribute fundamentally to building the **community** and dynamizing the sector



What are the important criteria?



- Innovative nature
- Market intelligence
- Market (pre-)alignment of product / service
- Growth potential
- Contribution to the community
- Motivation of the entrepreneur
- Coachable



MariFish.Inc

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**Thank you for
your attention!**

MARIFISH.Inc