

New marketing perspectives on Global Seafood Value Chains

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FHF Seminar Oslo June 2011

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Plan

- GVCs & UCCD
- Key Marketing Trends
- Marketing Research challenges





A schematic seafood GVC



Marketing: a 4 Stage process

UCCD:

- Understand
- Create
- Communicate
- Deliver

Understanding Markets

- ICT costs lower than ever
- Far greater market intelligence potential capacity
- More data – more noise?
- Greater concentration of GVCs & information control

Understanding Markets



- Supermarkets & EPOS data
 - ~ adding to understanding
 - ~ greater barrier to access
 - ~ EPOS reflects selection from product range = what consumers want?

Understanding Markets

- Emphasis upon quantitative data
- Data aggregation & dynamics
- Product attributes presented to consumers change frequently: price, promotion, product range, packaging, displays & juxtapositions
- Difficulties in capturing & tracking many of the qualitative data signals

Diverse positioning (value – high € quality) Increased product choice & complexity



gel ice pack
alking, barbecue
the park, the garden
parties, barbecues
shopping, car
trips, sporting eve
boating, outdoor
park, the garden
children p
shopping, car
ps, sporting eve
ng, boating, outdoor
park, the garden
ties, barbe
shopping, car
g, sporting eve
boating, o

M&S
folo

Understanding Markets

- More competitive, diverse & dynamic markets



Understanding Markets



More competitive, diverse & dynamic

John Goodlad feeds MSC-certified Scottish-caught North Sea herring to sea lions at Edinburgh Zoo. The sea lions are watched by thousands of people every year

Sea lions fed MSC North Sea herring

MSC-certified Scottish-caught North Sea herring landed at Peterhead last week became the staple diet of sea lions at Edinburgh Zoo, reports **David Linkie**.

John Goodlad, chairman of the Scottish Pelagic Sustainability Group, which secured MSC eco-label status for North Sea herring in August 2008, launched the new feed programme at Edinburgh Zoo last Tuesday by offering the first North Sea herring to two Patagonian male and female sea lions.



Understanding Markets

- Understanding consumers' understanding ?



Creating values

- ~ GVC values: consumers & B2B
- Broad species base
- Fish is a very versatile raw material – transforms into many different products
- Wide product range & expanding through new product development
- Many options with only minor modifications ~ flexibility



Innovative product attributes



Price: diverse positions adopted



Creating values

- Are core attributes of fish fully utilised ?
- Are USPs of fish exploited?





LINE CAUGHT SMOKED HADDOCK FILLETS

Fry, grill, bake or poach - **FOR BEST RESULTS BAKE**
As size and thickness of fish may vary, please note that larger, thicker pieces will take longer to cook.

OVEN
Remove all packaging. Preheat oven. Place product on foil. Dot with butter and season with salt and pepper to taste. Wrap product loosely in foil and place on baking tray.

190°C | Fan 165°C | 375°F | Gas 5
10-12 mins

GRILL
Remove all packaging. Line a grill pan with foil. Grill under a medium heat.

Medium
7-9 mins

Do not reheat.

STORAGE
Suitable for freezing. This product may have been frozen and returned to chill temperatures. Further freezing will not affect quality. Freeze on day of purchase. Use within one month. Defrost thoroughly before use.

INGREDIENTS
Smoked Haddock (100%).
Smoked Haddock contains Haddock (89%) - Salt - Curcumin - Annatto.

NUTRITION		GDA	
Typical values	per 100g	adult	
Energy kJ	370		
Energy kcal	90	2000	
Protein	18.4g	45g	
Carbohydrate	0.3g	230g	
of which sugars	0.3g	90g	
Fat	1.4g	70g	
of which saturates	0.9g	20g	
Fibre	0.3g	24g	
Sodium	0.40g	2.4g	
Equivalent as salt	1.00g	6g	

GDA = Guideline daily amount

IMPORTANT
This product is raw fish and must be cooked according to the cooking instructions. Although extra care has been taken to remove all bones, some small ones may remain.

As part of a healthy balanced diet, you should eat at least 2 portions of fish a week.

Our haddock is caught with hook and line by a small number of day boats specially selected by M&S. Our fish is selected from the best of the daily catch and filleted by hand for outstanding quality. Our fillets are cured and then richly smoked over smouldering beech wood chips.

Packed in Scotland with haddock caught in the North East Atlantic. 2000
© Marks and Spencer plc
PO Box 3325 Chester CH99 9Q5
marksandspencer.com

UK BB 011 EG

DISPOSAL
PACK
plastics
NOT CURRENTLY RECYCLABLE

Premium quality salmon, gently cured, lightly seasoned with spices, then smoked



MARKS & SPENCER

Scottish Lochmuir™ Salmon & Rocket Mousse Pots

Light Scottish Lochmuir™ salmon mousse starters

150g e

09 JUN

KEEP FLAT SUITABLE FOR FREEZING KEEP REFRIGERATED 0°C TO +5°C READY TO EAT

Scottish Lochmuir™ Salmon & Rocket Mousse Pots

3 for £10 marked poultry, fish & meat products. See price ticket for details.

Creating values

- Scope for further USP emphasis in respective markets?



Creating values

What lessons from other protein sectors ?



Communicate within GVCs

- Sustainability + ?...
- Provenance
- Welfare
- Ethics
- Local
- *et al*



Challenges for fish sustainability communications

- Varied sector structures of Cultured Vs Captured supplies: few large, many small
- Global value chains – disparate points of supply & consumption
 - ~ varied levels of information flows
- Complex channel management & control

Sustainable communications?



Oceans' fish stocks could vanish by 2050

Ed Pilkington New York

More than 20 million people employed in the fishing industry may need to be retrained for other work over the next 40 years if the final collapse of fish stocks in the world's oceans is to be avoided, the UN warned yesterday.

The UN's environment branch, Unep, gave a preview of its green economy report that will be published in October. It said if the world remained on its path of over-fishing, by 2050 fish stocks could become uneconomic to exploit, or extinct.

Pavan Sukhdev, head of the initiative, said: "Already 30% of the ocean fisheries have collapsed and are producing less than 10% of their original ability."

At the heart of the analysis is the \$27bn (£18.7bn) in subsidies it estimates are being injected into fishing every year, mainly by developing countries. The UN says the subsidies are huge for the scale of

the Guardian | Tuesday 18 May 2010
International

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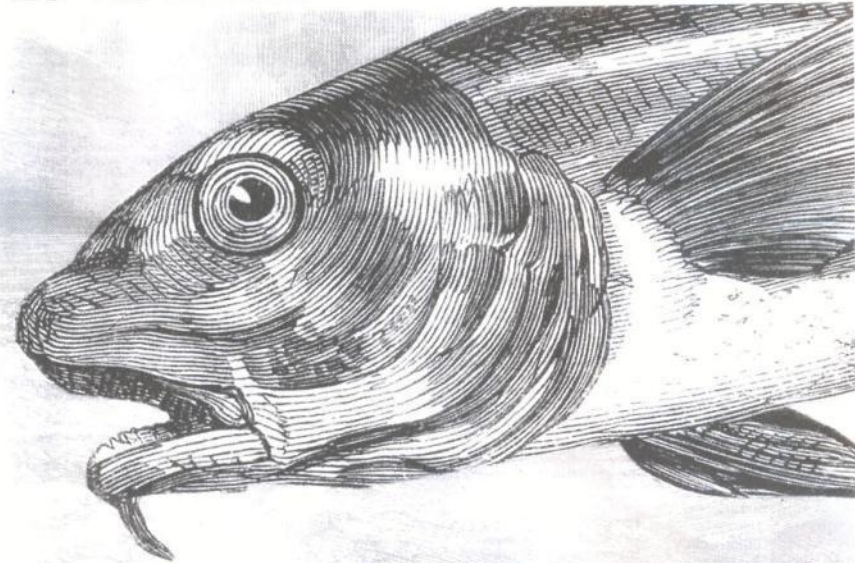
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THE INDEPENDENT



The 50 Best Festivals

The pick of Britain's music, arts & literary events this summer
In The



The Atlantic cod: living proof that conservation works

Scientists say the fish threatened with extinction is back on the menu again

PAGES 2-3

IN THIS SECTION

Armando Iannucci
Fear, loathing - and optimism

PAGE 10



Christina Patterson
Gordon Brown is happy - hooray!

PAGE 17

IN THE 24-PAGE SPORTS SECTION



David James
'I know Chelsea can be beaten'

FA CUP FINAL, PAGES 1-6

James Lawton
The week Capello turned into Sven

PAGE 7



Challenges for fish sustainability communications

- Disparate product range with diverse target markets
- Wide range of consumers with varied willingness & amenity to reception
- Increasingly complex messages
 - ~ realism of the task given purchase situation?
- Price & willingness to pay

Interpreting complex messages



Willingness to pay price premium?

Lidl, Scotland Oct 2010



Product	Price (450g)	Price (1KG)
OceanTrader MSC Fillet Fish Fingers	1.69	£3.758
OceanTrader Fillet Fish Fingers	1.49	£3.311

The image shows two price tags for OceanTrader fish products. The left tag is for MSC Fillet Fish Fingers, priced at 1.69 for 450g and £3.758 for 1KG. The right tag is for Fillet Fish Fingers, priced at 1.49 for 450g and £3.311 for 1KG. Both tags include the OceanTrader logo and the text 'Caught From Protected Fisheries - Cert. By The MSC'.

Price premium for MSC products?

Complex & Dynamic movements ; how to observe?



Challenges for fish sustainability communications

- Dominance of non-fish actors in channels – supermarkets (& foodservice)
- Generic & specific communications
- Fish greenwash flag waving

**‘Top Retailer’
for responsible
fishing.
Another award
that didn’t slip
through our net.**

We don't have to feed you a line about our fishing policy. We've just been named 'Top Retailer' for responsible fishing by Greenpeace for the second year running. That's because all M&S products, including our sandwiches and ready meals, only contain fish from well managed stocks. This ensures the species we catch, like Cornish Mackerel and Scottish Haddock will be around for generations to come. And we are also investing in restocking schemes with local fisheries. So with initiatives like these, you can rest assured, there really is nothing fishy about our fish.
www.marksandspencer.com

YOUR **M&S**
look behind the label



Additional communication channels

The background of the slide is a stylized illustration of several fish swimming in a blue, swirling, abstract environment that resembles water or a vortex. The fish are rendered in various colors and orientations, including a large reddish-brown fish at the top center, a greyish fish on the right, a reddish fish in the middle, and a brownish fish at the bottom right. The overall aesthetic is vibrant and dynamic.

- In-store signage:
 - ~ on-counter POS, surrounding environment
 - ~ scope for confusing signals / cluttered atmospherics
- Personal communications:
 - ~ variable staff knowledge...
 - ~ lack of control & consistency
- **Social media – ongoing communications**
- **Smartphones & online comparisons**

In-store fish sustainability communications



07 June 2011

Marks & Spencer launches Forever Fish

In-store fish sustainability communications





Foodservice fish sustainability communications



Delivery within GVCs

- As planned?



Delivery within GVCs

- Sustainability ✓ / ?
- Responsibly sourced – responsibly consumed?
- Need for greater scope on post-purchase impacts? LCA ? Lower Waste?
- More complex communications Vs need for reduced conflict & confusion

Delivery within GVCs

- Key USPs beyond expectations?
- Perceived 'Quality' attributes?
- Consistent delivery @ competitive prices?
- Resilient products



Delivery within GVCs

- Buyer positioning of Substitute-competitive fish: farmed & / wild?
- Market & consumer understanding of the comparative advantages of fish?
- Comparative sustainability positions of fish & non-fish proteins

Future Marketing Research challenges

- Diversity & complexity of international trade
~ parallel communications challenges
- Small – large transnational value chain actors
~ discrete & overlapping markets
- More complex & interdependent drivers in
fish and non-fish foods
- Entrenched agricultural power & policy impacts

Future Marketing Research challenges

- Increasing acceptance & availability of core farmed product as 'fish' – supported by captured supplies + niche markets
- Price competition will heighten : willingness to pay? For what?

Future Marketing Research challenges

- Sustainability & green attributes less front of mind ?
- Extension of sustainability coverage with retention of relevance
- Greater focus on post-harvest & post-EPOS consumer behaviours
- Improved utilisation of market data to UCCD



Thank you

Questions ?

Questions ?

Questions ?

Questions

Questions ?



Halibut

Scotland
Very clean and subtle in aroma, with a delicate tenderness and a high level of moisture that provides a notably silky mouth feel. Ideal for grilling or pan-frying.
£ 50.50 per kg

King Scallops

Scotland
Suitable for pan-frying, simply season and cook either side until golden brown.
£ 39.95 per kg

Fresh fish –post purchase packs





Pack communications





LINE CAUGHT COD FILLETS

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FOR BEST RESULTS BAKE
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please note that larger, thicker pieces will take
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with salt and pepper to taste. Wrap product loosely
in foil and place on baking tray.


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 **10-12 mins**

GRILL


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Grill under a medium heat.

 **Medium**

 **7-9 mins**

Do not reheat.

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GDA = Guideline daily amount

DISPOSAL


PACK



plastics

NOT CURRENTLY
RECYCLABLE

IMPORTANT

 This product is
raw fish and
must be cooked
according to
the cooking
instructions.

Although extra
care has been
taken to remove
all bones, some
small ones may
remain.



Our cod is caught with hook and line by a
small number of fishing boats, specially
selected by M&S. Our fish is selected from
the best of the daily catch and filleted by
hand for outstanding quality.

Packed in Scotland with cod caught in
the North East Atlantic. 2000

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PO Box 3339 Chester CH99 9QS
marksandspencer.com

UK
BB 011
EC

Supermarket fresh fish counter Carrefour, Paris



Fishmonger Borough market, London



Harrod's fresh fish counter London



MARKS &
SPENCER

Large Plaice Fillets

Our sustainably sourced Plaice
is delicious simply pan fried.
This mild flavoured fish has
a soft, small flaking texture



READY TO COOK
KEEP REFRIGERATED 0°C TO +5°C

DISPLAY UNTIL	USE BY
27 Oct	27 Oct

PRICE PER Kg	0.224 Kg
17.99	

PACK PRICE
£ 4.03



MARKS &
SPENCER

2 Haddock Loin Fillets

Our sustainably sourced
Haddock is delicious baked
in the oven. This medium
flavoured fish has a large
flaking texture



DISPLAY UNTIL/USE BY	PRICE/Kg
25 Oct	£ 19.99
PACK WEIGHT	PACK PRICE
0.294 Kg	£ 5.88



0 055801 305885 >



MARKS &
SPENCER

£1



Scottish
Kippers with butter

Our sustainably sourced Kippers
are delicious simply
boiled in the bag



200g e

KEEP REFRIGERATED 0°C TO +5°C
READY TO COOK

29 OCT

DISPLAY UNTIL
USE BY

Line caught Mackerel: Waitrose May '10



waitrose
garnish&go
Fresh Rainbow Trout with Lemon & Thyme Butter £2.49

waitrose
garnish&go
Fresh Anglesey Sea Bass with Fennel Butter £5.99

waitrose
garnish&go
Monkfish Fillets £26.99

waitrose
garnish&go
Fresh Yellowfin Tuna Steaks Line Caught £20.99

Reduced to £7.49
Fresh English Rainbow Trout Fillet

waitrose
garnish&go
Salmon Fillet £3.49

waitrose
garnish&go
Fresh Anglesey Whole Sea Bass £13.99

Reduced to £10.49
Fresh Greek Sea Bream £12.99

Sourced from a fishery certified to the Marine Stewardship Council Standard
Fresh Cornish Mackerel Line Caught £5.99



Line caught Pollock: Waitrose May'10



Select Farm
Scottish
Salmon
Prime Fillet
£16.49

Reduced to
£13.99
Fresh Whole
Dover Sole
£19.99

SEAFISH
Fresh Ray
Wings
£12.99

Fresh Cornish
Pollock Fillets
Line Caught
£13.99
kg
£6.31 lb

Fresh
Golden
Trout
Trafalgar Estate
£6.99
kg
£3.17 lb

Billingsgate wholesale market, London

