

Tint blir ferskt i britiske supermarkeder

Torskefiskkonferansen 2010

Tromsø 28.10.2010

Finn-Arne Egeness

Forsker

Nofima

Agenda

- Utvikling i kategorien brett pakkede torskeprodukter
- Betjente fiskedisker
- Hva har skjedd og hvorfor?
- Hva med forbruker?

MARKS &
SPENCER

fresh
never frozen

2 COD

FILLETS

No skin or bone

Chunky fillets of moist
and succulent cod,
just ready to cook.



SUITABLE FOR
FREEZING



MICROWAVE
OR OVEN

FISH FROM

KEEP REFRIGERATED 0°C to +5°C

DISPLAY UNTIL

21 OCT

USE BY

21 OCT

£ PER kg
13.49

kg
0.258

PACK
PRICE

£ 3.48



0 01 7762 703483 >

COOKING, CARE & STORAGE

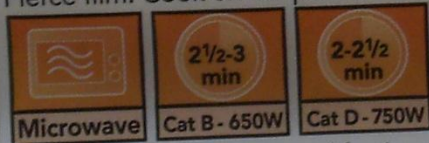
This product is raw fish and must be cooked according to guidelines. As size and thickness of fish may vary, please note that larger, thicker pieces may take longer to cook.

Preheat oven. Remove packaging. Place on oiled foil. Season with salt and pepper. Dot with butter. Close foil loosely over product. Place on a baking tray.



The fillet will begin to flake when cooked.

Microwave ovens vary. The following is a guide only. Remove outer film and pad. Cover with microwaveable film. Pierce film. Cook on full power.



After cooking leave to stand for 1 minute. Two or more packs will require longer cooking time. Check that product is piping hot before serving. The fillet will begin to flake when cooked.

Do not reheat.



Freeze on day of purchase. Use within one month. Defrost thoroughly before use.



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



Our fresh cod is fished from the deep waters of the Atlantic, then airfreighted to the UK within hours of landing.



Cod's large, succulent flakes taste delicious in a fish pie or baked with Mediterranean vegetables. Makes a great alternative to haddock.

Packaged in a protective atmosphere for freshness.

NUTRITION

Typical Values Per 100 g:
Energy 335kJ/80kcal ·
Protein 18.3g · **Carbohydrate Nil**,
of which sugars Nil · **Fat 0.7g**,
of which saturates 0.1g ·
Fibre Nil · **Sodium 0.06g** ·
Equivalent as salt 0.1g.



UK BB 011 FE
EC

Fish caught in the
North East Atlantic
Packed in the UK.
© Marks and Spencer plc
Baker Street London
W1U 8EP 2000
www.marksandspencer.com



READY TO COOK

KEEP REFRIGERATED 0°C TO +5°C

DISPLAY UNTIL

19 MAR

USE BY

19 MAR

PRICE PER Kg

14.99

0.244kg

PACK
PRICE

£3.66



0 01 7762 703667 >

MARKS &
SPENCER

2 Fresh **Cod** Fillets

NO SKIN
OR
BONE

NATURALLY
LOW
IN

FAT



SUITABLE FOR
FREEZING

COOKING, CARE & STORAGE

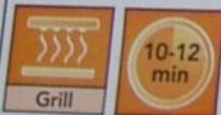
This product is raw fish and must be cooked according to the cooking instructions. As size and thickness of fish may vary, please note that larger, thicker pieces will take longer to cook. Remove all packaging.

For best results oven bake.

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.



Domestic grills vary. The following is a guide only. Preheat grill to medium. Coat fillets lightly in seasoned flour. Place product directly on base of grill pan. Dot with butter. Turn once during cooking.



Do not reheat.

Freeze on day of purchase. Use within one month. Defrost thoroughly before use.

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

NUTRITION

| Typical Values | Per 100 g |
|----------------------|-----------|
| Energy kJ | 335 |
| kcal | 80 |
| Protein g | 18.3 |
| Carbohydrate g | Nil |
| of which sugars g | Nil |
| Fat g | 0.7 |
| of which saturates g | 0.1 |
| Fibre g | Nil |
| Sodium g | 0.06 |
| Equivalent as salt g | 0.1 |

GUIDELINE DAILY AMOUNTS

Recommended by nutrition professionals for average adults

| | Per 100 g | Woman | Man |
|----------|-----------|-------|------|
| Calories | 80 | 2000 | 2500 |
| Fat g | 0.7 | 70 | 95 |
| Salt g | 0.1 | 5 | 7 |

Packed in the UK with North East Atlantic cod.

© Marks and Spencer plc
PO Box 3339 Chester
CH99 9QS 2000

M 0177 627 S

find out more

www.marksandspencer.com



for the love of
food...



All of our fresh cod is caught in the deep, icy cold water around Iceland.

We work in partnership with the best boats and fishermen who pride themselves on catching the finest cod every day. It is line caught, not trawled, which means that there is less damage to the fish therefore maintaining quality, texture and colour. The cod is then hand filleted and flown daily to the UK ensuring fantastic freshness. Olafur Bjornsson fishes cod for Marks and Spencer: "Icelanders have a passion for fish which is passed down for generations. For this reason we ensure that we fish sustainably which means care for the environment goes hand in hand with managing fish stocks."

to make this even more
special...

Lightly season the cod fillets with salt and cracked black pepper and bake in buttered foil. Serve with grilled tomatoes, garlic mushrooms and some **buttery mashed potatoes.**

MARKS &
SPENCER

2 Cod Loin Fillets

*Our sustainably sourced Cod
is delicious baked in the oven.*

*This medium flavoured fish
has a large flaking texture*



DISPLAY UNTIL/USE BY | PRICE/Kg

22 Mar

£ 19.99

PACK WEIGHT

0.287 Kg

PACK PRICE

£ 5.74



0 55800 605740 >



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

Marks & Spencer

2 cod loin fillets

Our sustainably sourced cod
is delicious baked in the oven

This medium flavored fish
has a large flaking texture


COD LOIN 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

 15-17 mins

Do not reheat.

STORAGE

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

| NUTRITION | | GDA |
|--------------------|----------|-------|
| Typical values | per 100g | adult |
| Energy kJ | 380 | |
| Energy kcal | 90 | 2000 |
| Protein | 18.8g | 45g |
| Carbohydrate | 0.3g | 230g |
| of which sugars | 0.3g | 90g |
| Fat | 1.5g | 70g |
| of which saturates | 1.0g | 20g |
| Fibre | 0.3g | 24g |
| Sodium | 0.06g | 2.4g |
| Equivalent as salt | 0.20g | 6g |

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.



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



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

© Marks and Spencer plc
PO Box 3339 Chester CH99 9QS
marksandspencer.com

UK
BB 011
EC

TESCO Responsible Sourced

COD FILLETS



Caught in **North East Atlantic
- Norway**

Catch method

Long Line

Display until

17 Mar

Use by 7 70 16:17

17 Mar

Weight (kg)

0.386

£/kg

8.00

Price

£ 3.09



0 297462 003094 >



Suitable for
home freezing

A typical fillet contains

| | | | | |
|----------|-------|------|-----------|------|
| Calories | Sugar | Fat | Saturates | Salt |
| 150 | 0g | 1.7g | 0.4g | 0.5g |
| 8% | 0% | 2% | 2% | 8% |

of your guideline daily amount

Keep refrigerated. Once opened, use immediately.

**Cod (*Gadus morhua* or *Gadus macrocephalus*)
fillets, skin on, bone in.**

Oven: • Remove all packaging. • Place on a baking tray in the centre of a pre-heated oven 180°C/350°F/Gas Mark 4 for 15-22 minutes. • Adjust times according to your particular oven. (For fan assisted ovens cooking times should be reduced). • All appliances vary, these are guidelines only. • Check food is piping hot throughout before serving.

• Not suitable for cooking from frozen.

Freezing guidelines: • Freeze on day of purchase. Use within one month.

Defrost: • Defrost thoroughly for a minimum of 10 hours in a refrigerator. **IMPORTANT: If food has thawed, do not refreeze.**

Caution: • This product will contain bones.

Storage: • Keep refrigerated. • Once opened, use immediately. • This product may have been previously frozen and has been restored to chill temperature under carefully controlled conditions. It is still suitable for home freezing. • Use by: see front of pack.

Nutrition

Additional information:

• Packaged in a protective

Storage: • Keep refrigerated. • Once opened, use immediately. • This product may have been previously frozen and has been restored to chill temperature under carefully controlled conditions. It is still suitable for home freezing. • Use by: see front of pack.

Additional information:

Sainsbury's

Taste the difference



Line caught Cod loin

skinless & boneless

chunky cod loin from the clear waters of the North East Atlantic ocean.

| Keep refrigerated | | |
|-------------------|-------|-------------------|
| Use by | kg | £/kg |
| 17 MAR | 0.268 | 15.99 |
| | | Pack price |
| | | £ 4.29 |
| | | Landed in Iceland |



0 275263 004298 >

2019

Cod and loins are cut from large cod, which are line caught in the well managed fisheries off the Icelandic, Norwegian and Faroese coasts. The size of the fish produces chunky loins which are ideal for all types of recipe.

Nutrition information

Typical values (steamed as per instructions) Per 100g: Energy 350 kJ; 83 kcal; Protein 18.6g; Carbohydrate nil of which sugars nil; Fat 0.9g of which saturated 0.7g; Fibre nil; Salt 0.2g of which sodium 0.07g.

The Wheel of Health is based on guideline daily amounts. For more information call 0800 636262 or visit www.sainsburys.co.uk/health

Ingredients

Cod.



Allergy advice
Contains fish.



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

We care...

...about our quality and what you think. If you have any comments, good or bad, please call us on our Careline 0800 636262 or visit www.sainsburys.co.uk
Packaged in a protective atmosphere. Caught in the North East Atlantic Ocean and packed in the UK for Sainsbury's Supermarkets Ltd, London EC1N 2HT.
See reverse for GDA information, storage and cooking instructions.

UK
GG199
EC

Try...

...sprinkling with herbs and lemon crumbs, serve with lemon wedges and parsley.

How to store and cook

Use by: see front of pack.



Keep refrigerated

For maximum freshness, store at less than 5°C and consume within 24 hours.

This product has been previously frozen - do not refreeze.



Oven cook from chilled

| | |
|----------|-------|
| Electric | 180°C |
| Gas | 4 |

1 Preheat oven to the required temperature as shown. 2 Remove all packaging. 3 Place the fish in foil to form a parcel. 4 Place on a baking tray in the centre of the oven and cook for 25-30 minutes.



To grill

1 Pre-heat grill to a moderate heat. 2 Remove all packaging. 3 Place the fish onto the base of the grill pan. 4 Brush the top of the fish with oil or butter. 5 Place the grill pan in the middle position in the grill. Cook without turning for 15 minutes.



To poach

1 Remove all packaging. 2 Place the fish in a pan with enough milk or water to cover. 3 Bring to the boil and simmer gently for 10 minutes.



To shallow fry

1 Remove all packaging. 2 Coat the fish lightly in flour. 3 Heat 10ml of oil in a frying pan over a medium heat. 4 Gently lower the fish into the hot oil. 5 Cook for 10-12 minutes, turning occasionally.



To steam

1 Bring a pan of water to the boil on a medium heat. 2 Remove all packaging. 3 Place the fish on a plate and cover with foil. 4 When the water is boiling, place the plate on top of the pan. 5 Continue to cook on a medium heat for 20-24 minutes.

As the natural thickness and size of the fish and the performance of cooking appliances may vary, these are guidelines only. Always check that the product is piping hot before serving.

All fish on our counter is fresh and never frozen

FISHMONGER
Fish of the day
Fresh King
Salmon
50p
90c
Save £1
£18.99 per
Lovely fresh fish!



MORRISONS
Morrisons Supermarkets PLC, 801 St...

GER

terfly

Use by

18JUN

£1.00

MORRISONS

Morrisons Supermarkets PLC, 801 St...



9.99 0.305kg 18JUN

ALWAYS KEEP IN THE FRESH STORE

£2.05

MORRISONS



YOUR FISHMONGER

Fresh Cod Fillet With Parsley

Ideal to Grill, Bake, Poach or Microwave

May Contain Bones
Good to Freeze

Caught in North East Atlantic
Line and seine net, caught in in shallow waters
Sustainable (MSC)

1.0g Net weight Use by

9.99 0.310kg 18JUN

£3.30

ALWAYS KEEP IN THE FRESH STORE

MORRISONS

Morrisons Supermarkets PLC, 801 St...



Brettpakkede produkter

- Stor variasjon i tidligere behandling av råstoffet
 - May have been previously frozen
 - Previously frozen
 - Ingen informasjon
 - Fresh, never frozen
- Fokuset på ferskhets har forsvunnet
- Større fokus på bærekraft og fangstredskap

Brettpakkede produkter

- Tint fisk har fått innpass i etablerte ferskfiskkanaler (supermarkeder).
- Endringene skjer i alle de store kjedene slik som Tesco (31 %), ASDA (17 %) og Sainsbury`s (12 %)
- Morrisons (12 %) har differensiert seg med å bruke genuint ferske produkter (som aldri har vært fryst)
- (% = markedsandel av det totale dagligvaremarkedet).

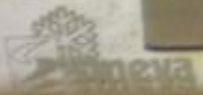
Hvordan ser det ut i ferskvaredisken?

- Waitrose
- Tesco
- ASDA
- Morrisons

Control Standard
Fresh Hake
Fillets
£15.99
kg
£7.99/lb

FISH OF THE DAY
Fresh Icelandic
Prime Cod
Loins
Linn caught in the North
East Atlantic Ocean
Offer ends 31/03/24

**SAVE
1/3**
~~£17.99~~
£11.99
kg
~~£5.99/lb~~



Skinless and Boneless Atlantic Cod Loin

Juicy, firm white fish, caught by line or
seine net.

Responsibly Sourced from
Well Managed Fisheries

May have been previously frozen, however, is still suitable for home freezing. Wild
caught in the North West Atlantic, the North East Atlantic. Equivalent to £6.65/lb.

£1.47 100g

£14.67 kg

Guide price per loin is

£2.93

Based on an average weight of 200g

Responsibly Sourced from
Well Managed Fisheries

£2.93

Based on an average weight of 200g

May have been previously frozen, however, is still suitable for home freezing. Wild caught in the North West Atlantic, the North East Atlantic. Equivalent to £6.65/lb.

Fresh Fish



Our collection of fresh fish - just ask!

Haddock & Cod Fillet Portions
2 for £3
Cod Fillet

Your delicious fish
in 3 easy steps

1. Pick your fish and choose your butter
2. We'll put it in the oven ready bag
3. Just pop it in the oven!



Loxster
£4

with these specials
for a day

Cod Fillet

Cod Fillet

£5.00

Per Kg

£8.70

£5.00

Caught in NE Atlantic.
Previously frozen.

May contain nuts, seeds & other allergens.

All fish on our
counter is **fresh**
and **never**
frozen

100% of the time!

**Save
£2**

Fresh Smoked Haddock Loin
Maximum weight 200g
Contains 100g

~~£12.29~~
£10.29

Smoked **£9.99**

Net Caught in North East
in 21st March

Bakgrunn for markedsendringer

- Aktørene i verdikjedene opplevde en varierende og uforutsigbar tilgang på ferske torskprodukt i perioder av året (sommer)
- Hvordan løse denne utfordringen?
- Leverandører fant det hensiktsmessig å forsøke tinte produkter
- Akseptert av kjedene etter vareprøver

Leverandører

- Selvstendige økonomiske aktører
- (Seachill, The Seafood Company, Cumbriand, Sealord)
- Avgjør hvilket råstoff som skal brukes (ferskt eller tint)
- Ingen sammenheng mellom tidligere behandling av råstoffet og utsalgspris
- Profittmaksimering styrer valg av råstoff (samme pris i butikk)
 - Lavere råstoffpris gir større marginer
 - Substitusjon hele året

Leverandører

- Mange produktalternativer for innkjøper;
 - Fersk filet
 - Fryst filet
 - Sløyd og hodekappet fisk
- Tint fisk gir (ofte) lavere transaksjonskostnader;
 - Mindre svinn
 - Enklere logistikk
 - Færre uforutsette hendelser

Supermarkedskjedene

- Stabilt og forutsigbart utvalg av alle fiskeprodukter hele året, som bidrar til større lønnsomhet



OUR NEW FISH COUNTER

Welcome to our Fish counter. Fish counter gives you the option of purchasing fresh fish to be delivered directly to your door. Use our Fish Counter Option tool to easily browse our fresh fish range and provide you with suggestions for filleting, wine matches and reasons to buy fish.

Browse our fresh fish range, using our [Fish Counter tool](#) >

Reasons to buy fresh fish from tesco.com:

- Fresh fish delivered straight to your door
- Over 50 fresh fish and shell fish to purchase
- Low in calories and packed with goodness
- Download and print our preparation guides



WINE AND FOOD MATCHING



REASONS TO EAT FISH

"Tesco take care to maintain the quality of our fish at every stage from the boat or the farm to our stores. As soon as the fish are brought aboard the fishing boats or taken from the farm they are chilled down in ice (or ice cold water for smaller fish like mackerel and herring) and kept at that temperature all the way to the factory that processes and packs our fish. To give a full range of fish all year some of our fish and shellfish has to be frozen in peak condition and carefully defrosted to preserve the flavour and texture that we demand for our customers. The emphasis with all our fish is on the speed of processing in a temperature controlled factory, and the fish is soon in a chilled lorry on route to our store. We keep your fish in the best possible condition to preserve the delicate flavours and texture."



PREPARATION GUIDE

"We know you love fish and shellfish..."

...which is why we work daily to ensure we source products in a Responsible manner"



RESPONSIBLE FISHING



Find out more about Tesco's sourcing policies at Greener Living

SOURCING POLICIES

OUR FRESHNESS STATEMENT

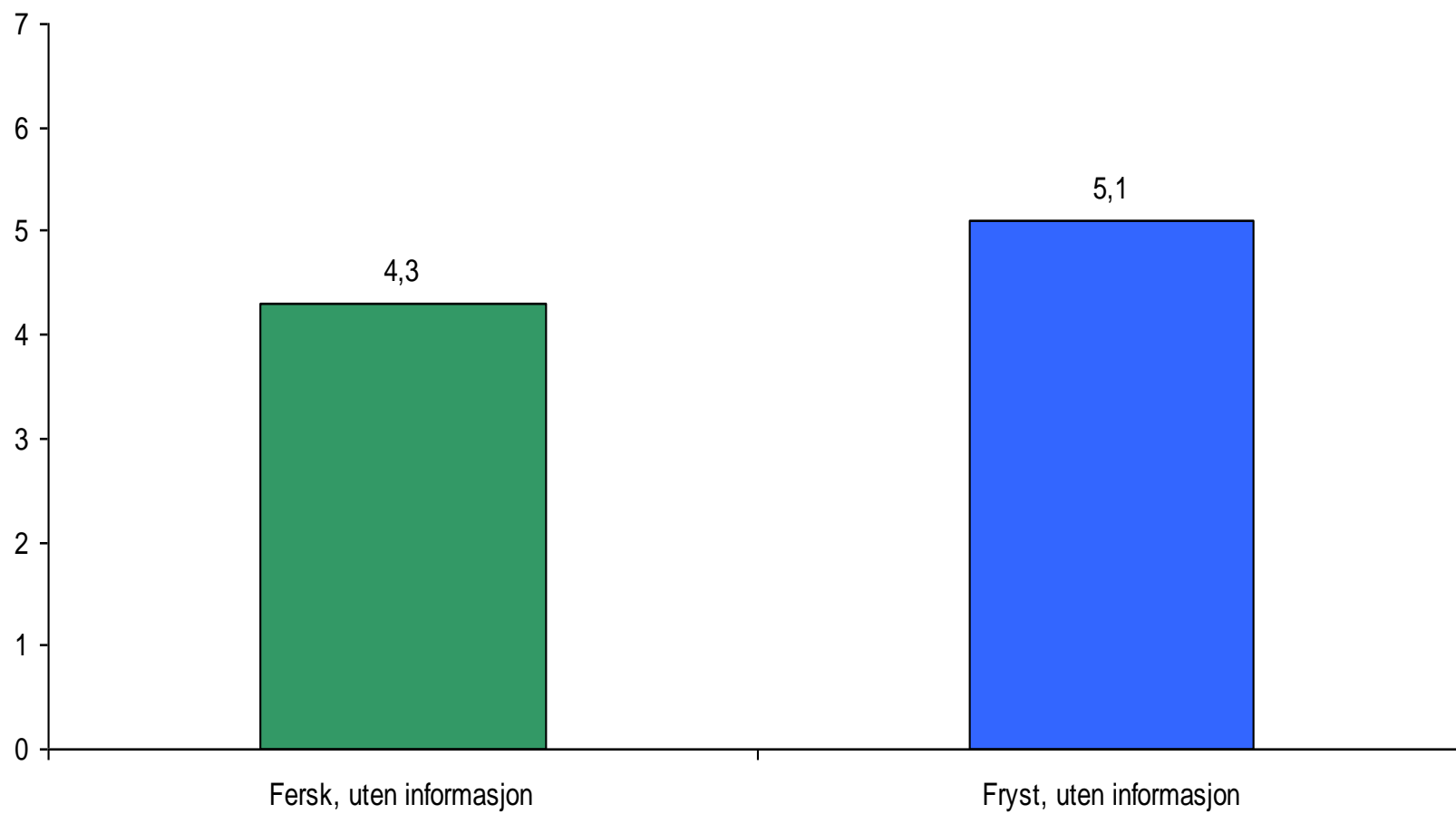
Fokusgruppeundersøkelser i UK

- Britiske forbrukere oppfatter “chilled” som ferskt
- Liten eller ingen kjennskap til endringene i kategorien

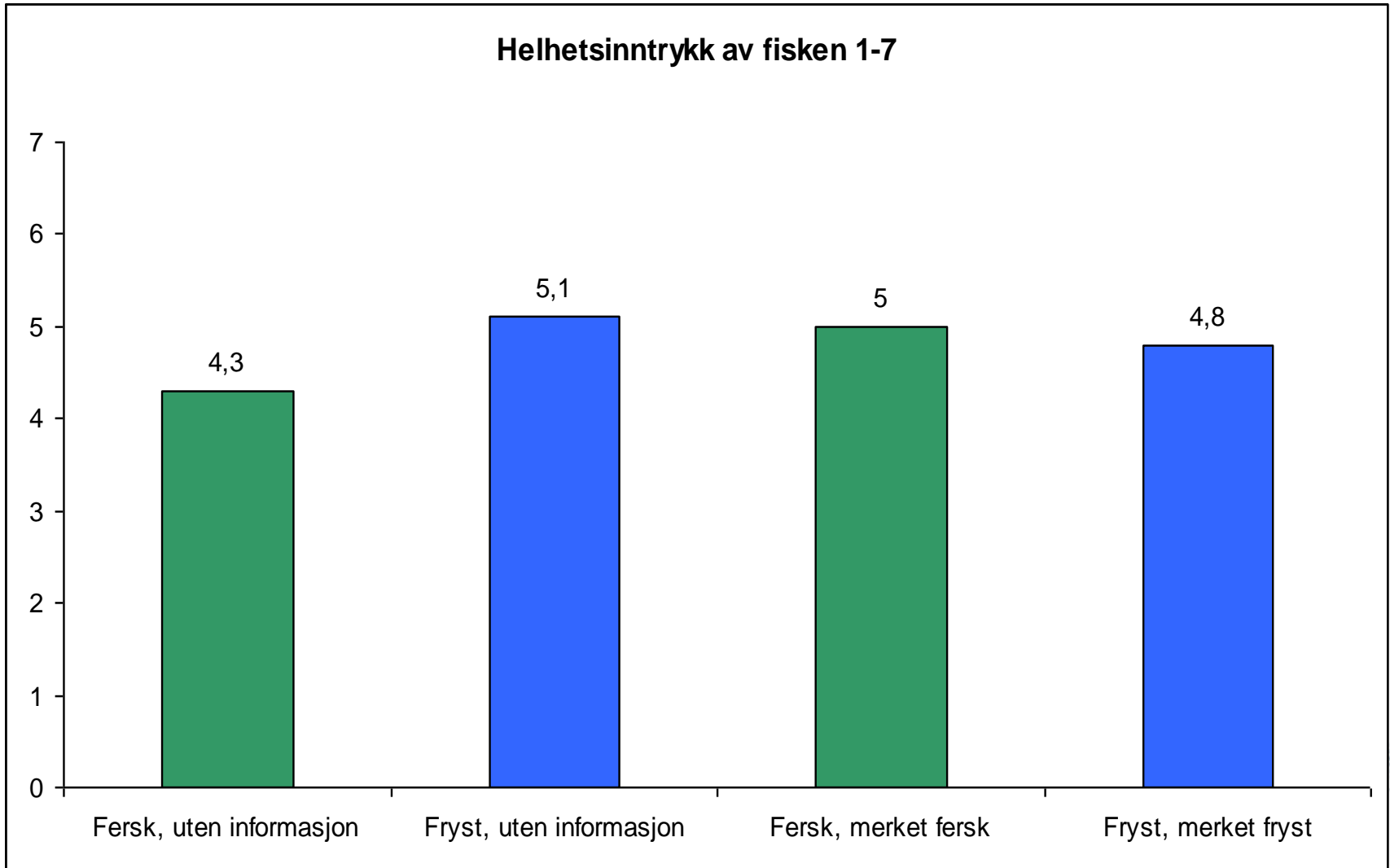
Forbrukertest i UK - forbrukers oppfatning av tinte og genuint ferske fiskeprodukter

- Reading, England
- 136 personer, 70 % kvinner og 30 % menn
- Helt eller delvis ansvar for innkjøp av mat
- Råstoff - levendelagret (ufôret) torsk. Halvparten fryst i 2 uker, andre sendt fersk til markedet
- Prøvene ble servert kokt, naturell
- Hver runde bestod av en fersk og tint prøve
- Første par uten informasjon, andre par med informasjon og tredje par med uriktig informasjon
- Forbruker rangerte produktene på en skala fra 1-7

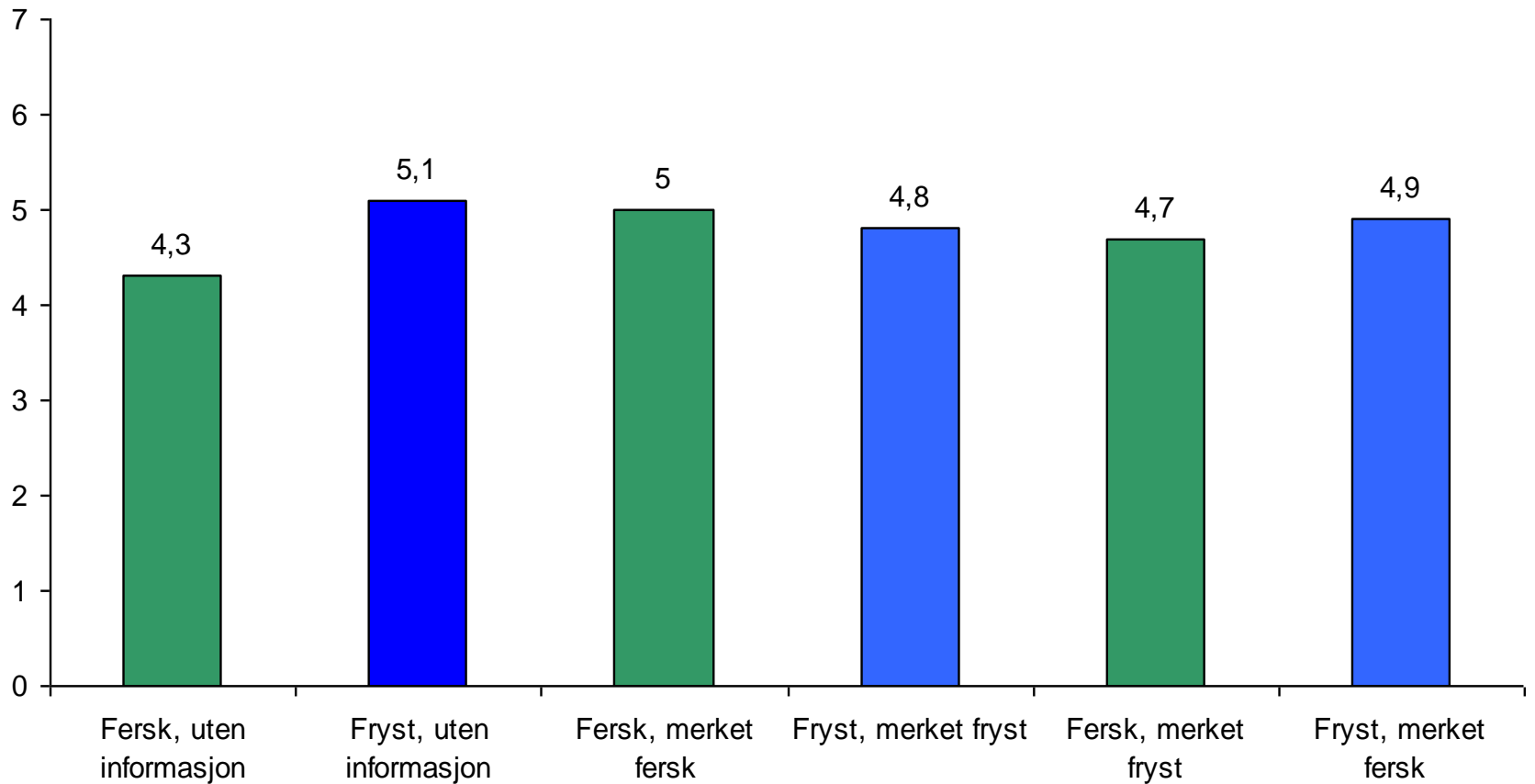
Helhetsinntrykk av fisken 1-7



Helhetsinntrykk av fisken 1-7



Helhetsinntrykk av fisken 1-7



Oppsummering

- Tint fisk har fått innpass i etablerte kanaler for fersk fisk i det britiske markedet
- Indikasjon på at konsumentene i liten grad er klar over denne endringen
- Lønnsomhet og stabil tilførsel er drivkrefter for endring
- Tint fisk aksepteres av forbrukere
- Informasjon om ferskhets gir bedre helhetsinntrykk for fersk fisk
- Hvordan er utviklingen i andre segmenter i andre markeder?
- Hvordan vil dette påvirke norsk fiskerinæring?
- Les mer i informasjonsheftet i konferansemappen

Takk for oppmerksomheten.

Finn-Arne Egeness

finn-arne.egeness@nofima.no

+ 47 90 65 88 40

Nofima