The value of product attributes on frozen whitefish at the retail level
Background and purpose

• Increasingly producers and retailers introduce seafood products with new attributes
• As a result each product category often contains many products with numerous different product attributes
  – Environmentally friendly, healthy, best quality, provenance...
• Different attributes have different costs and market values
  – MSC certification has a certain cost but unknown value in the marketplace
  – Branding may be very costly
  – Other attributes may be low cost eg. adding a "low fat" label to a low fat product has insignificant costs.
• What is the actual market value of the individual product attributes – and in particular sustainability – on seafood?
• What is the actual presence of eco-labels and sustainability claims at the retail level?
Research method

- In-store product and price observations
- 8 UK chains observed via 8 supermarkets in Glasgow:
  - Asda, Coop, Tesco, M&S, Lidl, Morrisons, Sainsbury’s, Waitrose
- Weekly observation of prices of a range of products:
  - Fresh (fish counter), chilled (pre-packed) and frozen cod, haddock, Alaska pollock, salmon, and mackerel
- Approx 500 products in total (frequent additions and deletions)
- Photos used to identify attributes & changes over time
- Started October 2010 for whitefish and mackerel
- Started October 2011 for salmon
- Econometric price analysis
- Description of market presence and dynamics re sustainability
Atlantic Cod
4 Chunky Fillets

- individually wrapped
- cook from frozen
- skinless & boneless

NEW
OUR BEST EVER
COOK FROM FROZEN,
WHITE FISH FILLETS

- COLEY FILLETS CAUGHT IN THE NORTH EAST ATLANTIC WATERS.
- POLLOCK FILLETS CAUGHT IN THE PACIFIC OCEAN. SKINNED AND BONELESS.
FROZEN TO LOCK IN FRESHNESS AND FLAVOUR.

Serving Suggestion

Best Before Date:
15 MAR 2013
P-D 12074-2
02-A7
Keep frozen
COOK FROM FROZEN

POLLOCK FILLETS

POLLOCK FILLETS CAUGHT IN THE PACIFIC OCEAN, SKINLESS AND BONELESS, FROZEN TO LOCK IN FRESHNESS AND FLAVOUR.

Serving Suggestion

Best Before End:
When stored at -18°C or below

02 FEB 2013 12539

Nofima
Scottish Golden Smoked Haddock Fillets

Our sustainably sourced Haddock fillet is smoked over smouldering beechwood chips

Exactly the same fresh fish as you find in our chilled range... just frozen
Line Caught Icelandic Haddock Fillets

Our sustainably sourced Haddock fillet is delicious baked in the oven. This medium flavour fish has a large flaking texture. Minimum 4 portions.

Exactly the same fresh fish as you find in our Chilled range... just frozen.
SEASTAR

ICELANDIC COD FİLLETS

Sourced from a responsibly managed fishery

KEEP FROZEN

Best Before End: See back of pack

500g
New!

Cook from Frozen

Mackerel Fillets

Our responsibly sourced mackerel, deliciously rich in flavour.
Skin on and bone in mackerel fillets in a protective ice glaze

COOKING INSTRUCTIONS

For best results cook from frozen. If allowed to defrost then reduce cooking time accordingly.

**To Shallow Fry from frozen**
- Remove all packaging
- Put one teaspoon of olive oil in a frying pan put over a moderate heat.
- Place the fillets skin side down, cook on medium heat for 5 minutes, turn over and cook for 5 minutes. Then turn the fillet back onto the skin side and cook for a further 5 minutes.

**To Oven Cook from frozen**
- Remove all packaging
- Pre-heat oven to 190°C/375°F/Fan 170°C/Gas Mark 5
- Wrap fillets in foil to form a parcel, cook for approximately 20-25 minutes.
- Check product is piping hot before serving.
- Do not re-heat.

We have given you these cooking instructions as a guide only.

INGREDIENTS

Mackerel Fillets [Scromber scombrus] 90%, Protective Ice Glaze.

ALLERGY ADVICE

Contains fish.

At a guide, we recommend this product provides:

NUTRITION

<table>
<thead>
<tr>
<th>Nutrient</th>
<th>Typical values Per 100g</th>
<th>Guideline daily amounts Women</th>
<th>Guideline daily amounts Men</th>
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<tbody>
<tr>
<td>Energy</td>
<td>879kJ 210kcal</td>
<td>2000 2500</td>
<td>2300 3000</td>
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<tr>
<td>Protein</td>
<td>26.5g</td>
<td>45g 55g</td>
<td>50g 65g</td>
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<td>Carbohydrate</td>
<td>1.0g</td>
<td>230g 300g</td>
<td>250g 325g</td>
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<td>- of which sugars</td>
<td>0.4g</td>
<td>90g 120g</td>
<td>100g 140g</td>
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<td>Fat</td>
<td>11.0g</td>
<td>240g 300g</td>
<td>260g 325g</td>
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<td>- of which saturates</td>
<td>2.9g</td>
<td>70g 95g</td>
<td>80g 105g</td>
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<td>Fibre</td>
<td>0.6g</td>
<td>24g 24g</td>
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<tr>
<td>Sodium</td>
<td>0.05g</td>
<td>2.4g 2.4g</td>
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<tr>
<td>equivalent as salt</td>
<td>0.1g</td>
<td>8g 8g</td>
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STORAGE

- Keep frozen
- For star marked freezers:
  - Up to 1 week
  - Up to 1 month
  - Up to 3 months
  - (18°C) Until Best Before End date
- Once defrosted, do not re-freeze.

WARNING

Contains bones.

CHOSSEN BY YOU

We believe customers are the best judges of the quality of our food. That’s why every “Chosen by you” product has been tried and tested by you. It’s only when our products meet your high standards that we put them in our “Chosen by you” range.

We are so confident about the quality of our products that if you are not 100% satisfied - simply return the pack and contents to store on your next visit. (Ref. 0030 952 000) OR go to ‘Contact Us’ on www.ada.co.uk quoting knowing the information in this Best Before End box.

Caught in North East Atlantic, produced in the UK, packed in the U.K., for Aida Stores Limited, Leeds LS1 1AD

Source: Cambridge Market Research 2011

PACK INFO

[Recyclenow.com]

BAG

PLASTIC not currently recycled

400g

Net of ice glaze: 360g

400g

UK VY 104 EC

For Best Before End: see front of pack

5 052449 340884 5
Processed form by supermarket

![Processed form by supermarket chart](image-url)
Species by supermarket

<table>
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<th>Supermarket</th>
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<th>Hyse</th>
<th>Torsk</th>
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<tr>
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<td>30</td>
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<tr>
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<td>10</td>
<td>40</td>
<td>10</td>
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<tr>
<td>Marks &amp; Spencer</td>
<td>10</td>
<td>30</td>
<td>10</td>
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<td>10</td>
<td>30</td>
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<td>COOP</td>
<td>5</td>
<td>25</td>
<td>5</td>
</tr>
<tr>
<td>Sainsbury's</td>
<td>5</td>
<td>25</td>
<td>5</td>
</tr>
<tr>
<td>LIDL</td>
<td>5</td>
<td>25</td>
<td>5</td>
</tr>
<tr>
<td>Tesco</td>
<td>5</td>
<td>25</td>
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</table>
Eco vs No-Eco by supermarket

Antall produkter

- Morrison
- ASDA
- Marks & Spencer
- Waitrose
- COOP
- Sainsbury's
- LIDL
- Tesco

Legend:
- NoEco
- MSC
- Forver Foods (FRVF)
- Fish for life (FFL)
Eco-labels by species

FFL = Fish for Life, see: [http://www.fishforlife.co.uk/](http://www.fishforlife.co.uk/)
Premie fryst

<table>
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<tr>
<td>Papeske</td>
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<tr>
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Planned work (2013)

• Reveal any price premium for eco-labels
  • What is the value of different eco-labels over time?
• Changes in the share of eco-labelled products over time
  • MSC, Fish for life, Forever Foods, Icelandic scheme, “private” claims (“responsibly sourced”)
• Identify co-existing attributes & impacts
• Reveal and describe retailer positioning re eco-labels
• The mackerel case (with and without MSC - and back again?...)

18.02.2013