

# 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



Serving suggestion

**NEW**  
OUR BEST EVER



Per fillet

Calories  
90  
4.5%

of an adult's GDA\*



**ASDA** *Chosen by you*

COOK FROM FROZEN.

## WHITE FISH FILLETS

COLEY FILLETS CAUGHT IN THE NORTH EAST ATLANTIC WATERS.  
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  $-18^{\circ}\text{C}$  or below

**15 MAR 2013**  
**P-D 12074-2**  
02:47

Keep frozen



CUT HERE

**ASDA** *Chosen by you*

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

Net of Ice Glaze

 **Nofima**





# ALASKA POLLOCK FILLETS

High  
in Protein

SKINLESS

One serving 125g as sold contains

Calories	Sugar	Fat	Saturated	Salt
94	0g	1.0g	0.1g	0.33g
5%	0%	1%	<1%	5%

of an adult's guideline daily amount\*



Serving suggestion: Dieetom dieetola uunne /  
Terveystavutus, serving suggestion /  
Terveystavutus / suggerimento di preparazione

8-14 FILLETS

\* FROZEN \*

1000 g



MARKS &  
SPENCER

# 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



SERVES 3 - THIRD PACK PROVIDES

CALS	SUGAR	FAT	SAT FAT	SALT
160	0.5g	4.0g	2.8g	2.59g
8%	LESS THAN 1%	6%	14%	43%

OF YOUR GUIDELINE DAILY AMOUNT



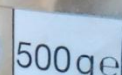
SCOTTISH  
HADDOCK



BONE



COOK FROM  
FROZEN



READY  
TO COOK

DISPLAY UNTIL  
- END

BEST BEFORE  
- END  
AUG 12 NOV 12

KEEP FROZEN



MARKS &  
SPENCER

## 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



SERVES 4 - per 100g

CALS	SUGAR	FAT	SAT FAT	SALT
90	0.3g	1.3g	0.8g	0.13g
5%	LESS THAN 1%	2%	4%	2%

OF YOUR GUIDELINE DAILY AMOUNT

NO



SKIN OR  
BONE

COOK FROM  
FROZEN

500ge

READY  
TO COOK

DISPLAY UNTIL  
- END

BEST BEFORE  
- END

AUG 12

NOV 12

KEEP FROZEN

U



**SEASTAR**

®

ICELANDIC  
**COD**  
FILLETS



Sourced from a responsibly managed fishery



**500g e**

inclusive of protective ice glaze

**KEEP FROZEN**

Best Before End:  
See back of pack



**ASDA** *Chosen by you*

**New!**

COOK FROM FROZEN

# MACKEREL FILLETS

OUR RESPONSIBLY SOURCED MACKEREL,  
DELICIOUSLY RICH IN FLAVOUR



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

**17 FEB 20**  
**PJ 12048**  
00:04

Keep frozen

**400g** \*inclusive of ice glaze

 **Nofima**



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

As a guide, we recommend this product provides:

### NUTRITION

4

servings

Typical values (shallow fried)	Per 100g	Guideline daily amounts	
		Women	Men
Energy	879kJ 210kcal	2000	2500
Protein	26.5g	45g	55g
Carbohydrate of which sugars	1.0g 0.4g	230g 90g	300g 120g
Fat of which saturates	11.0g 2.9g	70g 20g	95g 30g
Fibre	0.6g	24g	24g
Sodium equivalent as salt	0.05g 0.1g	2.4g 6g	2.4g 6g

### STORAGE

- Keep frozen  
For star marked freezers:

★	Up to 1 week
★★	Up to 1 month
★★★ (-18°C)	Up to 3 months
★★★★ (-18°C)	Until Best Before End date

- Once defrosted, do not re-freeze



### WARNING

Contains bones.

### CHOSEN 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 OR phone 0800 952 0101 OR go to 'Contact Us' on [www.asda.com](http://www.asda.com) quoting 'ENW' and the information in the Best Before End box.

Caught in North East Atlantic, produced in the U.K., packed in the U.K. for Asda Stores Limited, Leeds LS18 5AD

Source: Cambridge Market Research 2011

### PACK INFO

[recyclenow.com](http://recyclenow.com)



BAG

PLASTIC not currently recycled

400g

Net of ice glaze:

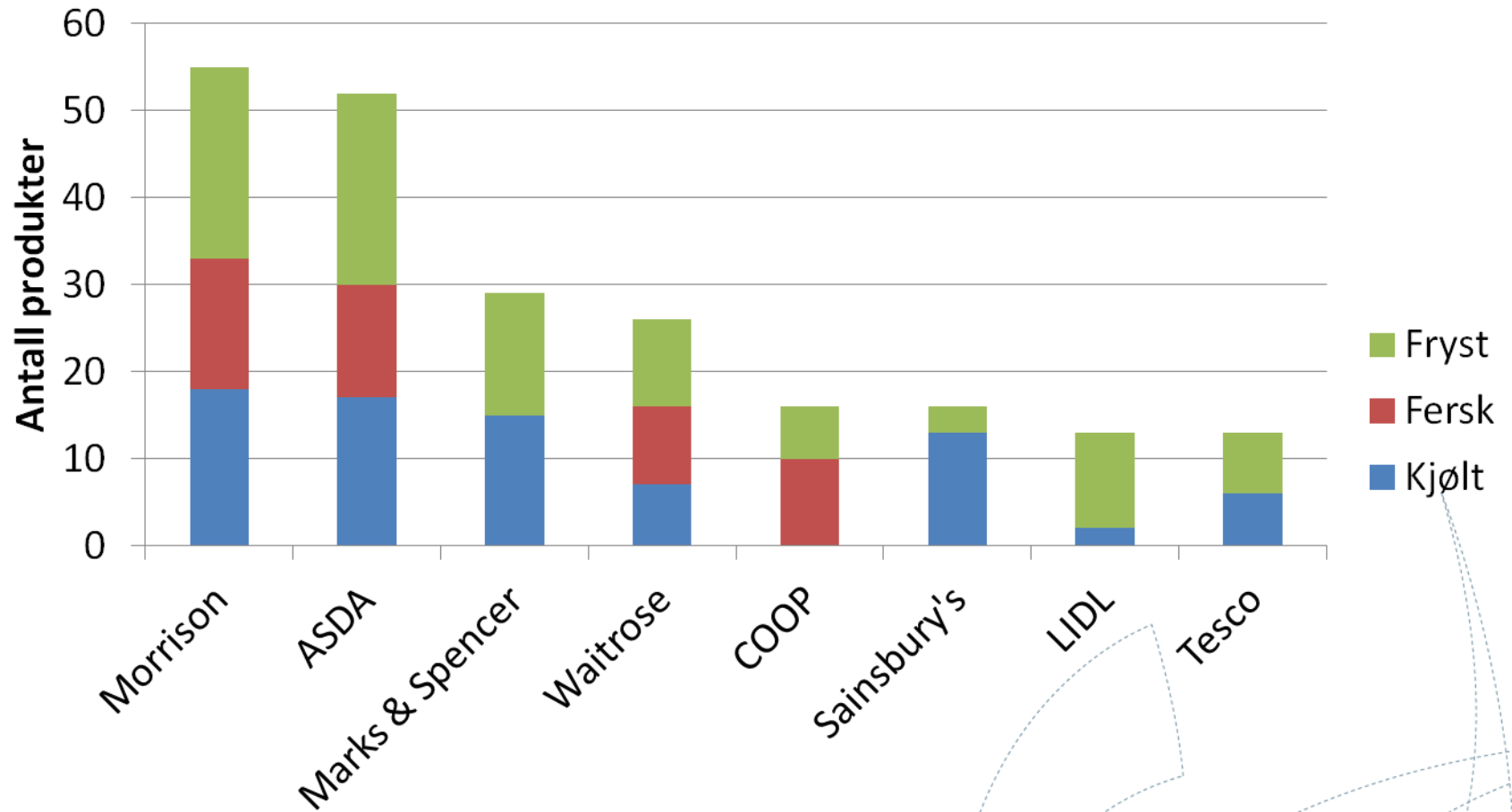
360g



For Best Before  
End: see front  
of pack

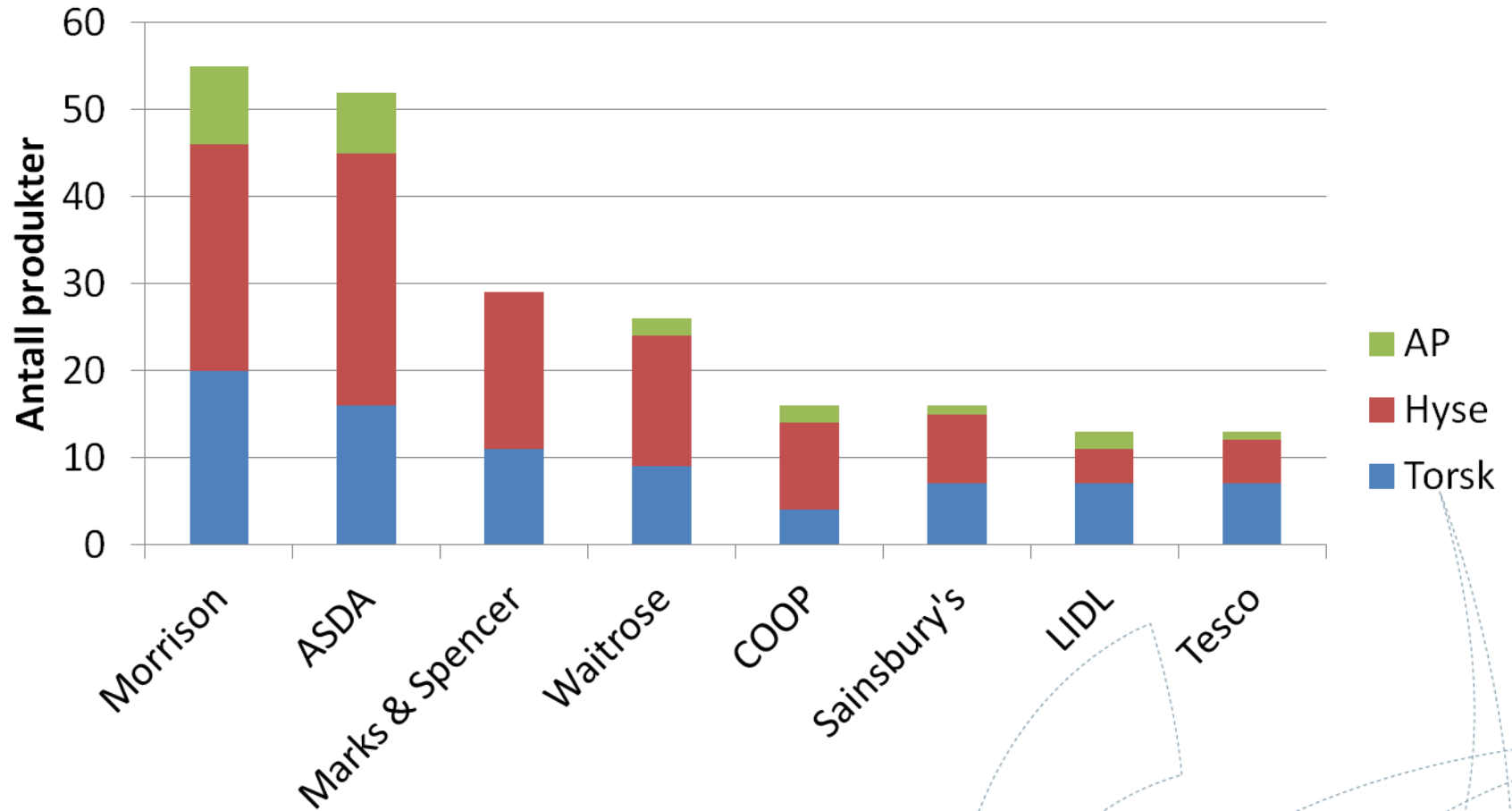


# Processed form by supermarket

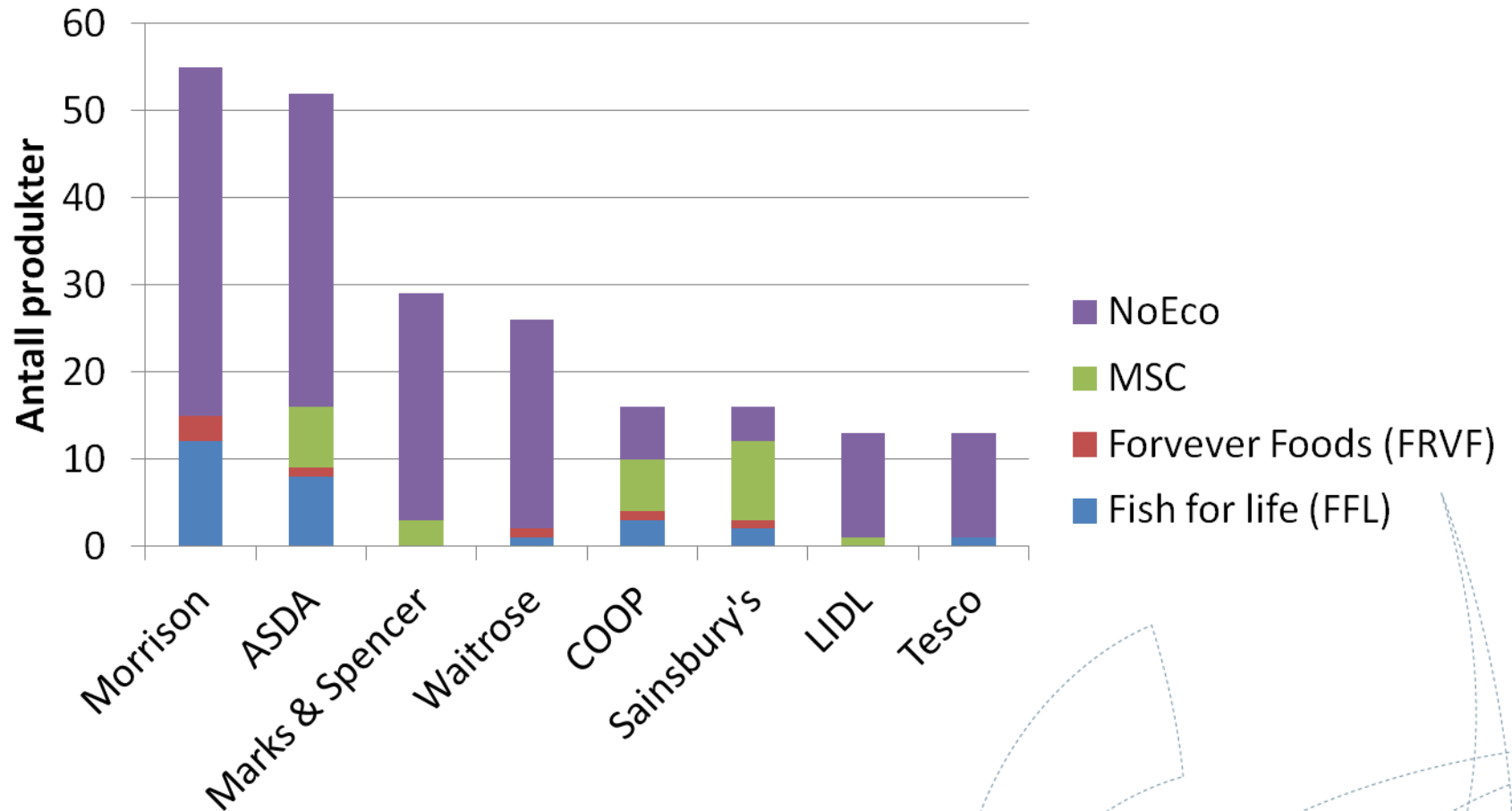




# Species by supermarket

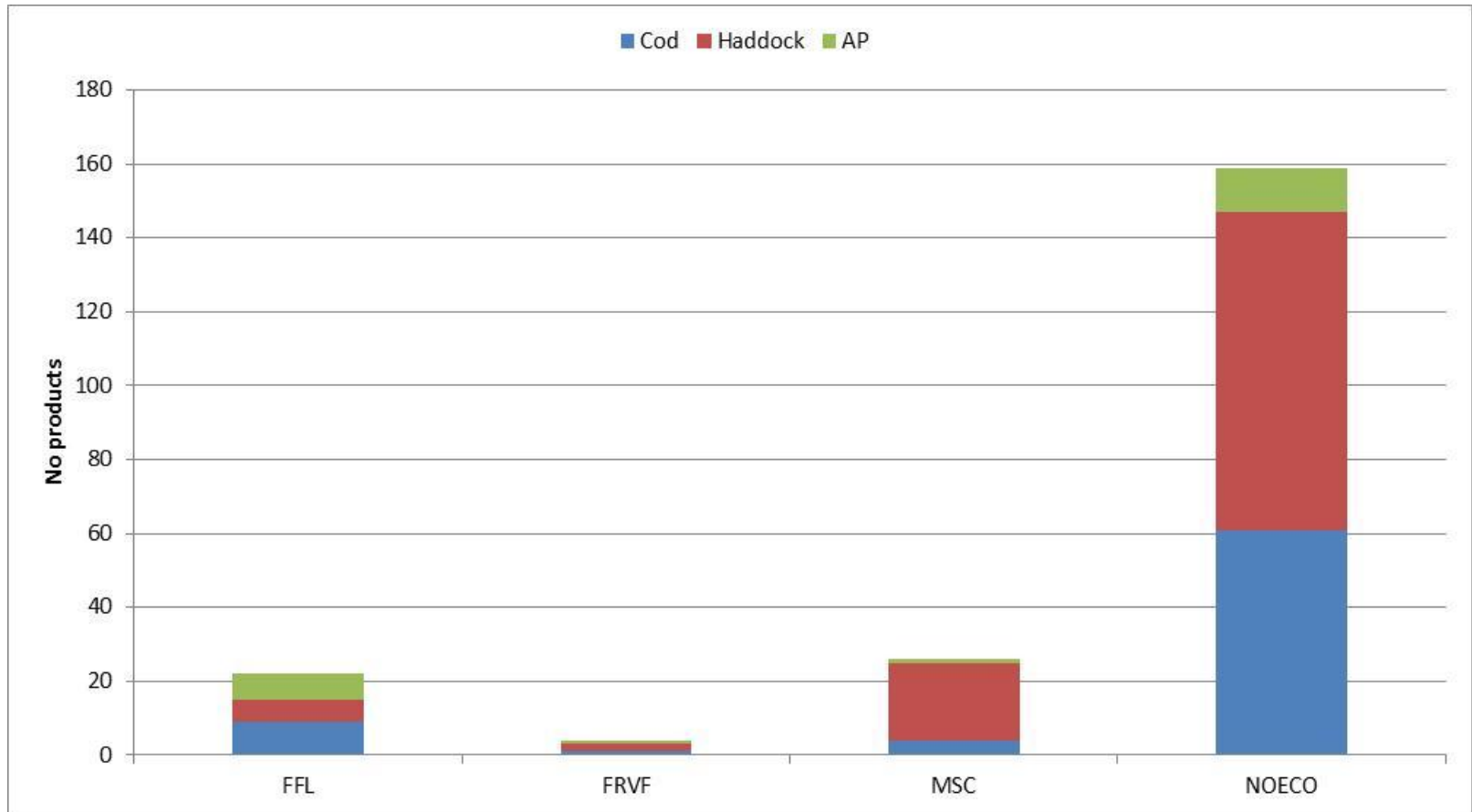


# Eco vs No-Eco by supermarket





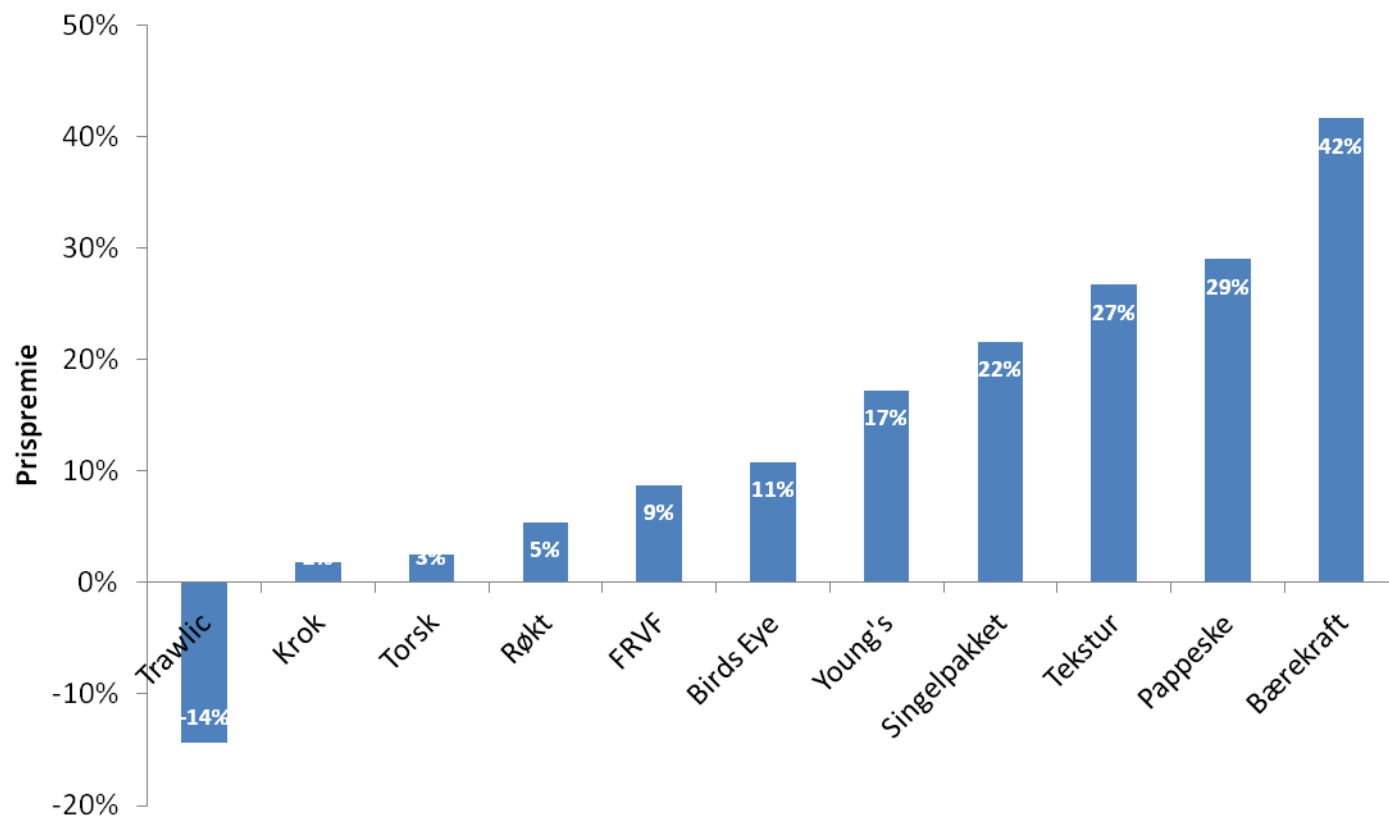
# Eco-labels by species



FFL = Fish for Life, see: <http://www.fishforlife.co.uk/>

FRVF = Forever Food, see: <http://www.iglo.com/en-gb/forever-food/homepage/>

## Premie fryst





# 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?...)