

Råstoff fra lineflåten

Muligheter i etablerte kanaler for fersk fisk

Finn-Arne Egeness

Linefanget fisk

- Foretrukket råstoffet i mange markeder
- Høy og jevn produktkvalitet
- Oppnår bedre priser enn fisk fanget med andre redskaper

Torskemarkedet

- Torskemarkedet
 - Konvensjonelle produkter (saltfisk og klippfisk)
 - Fryste produkter
 - Ferske produkter
- Råstoff fra lineflåten har i hovedsak vært kanalisert til
 - Konvensjonelle produkter
 - Fryste produkter
- Markedsendringer åpner muligheter for ombordfrost råstoff fra lineflåten i etablerte kanaler for fersk fisk

Agenda

- Markedsendringer i i britiske supermarkedskjeder
 - Brettpakkede produkter av torsk
 - Betjente fiskedisker
- Bakgrunn for observerte markedsendringer
- Markedsendringer gir nye utfordringer
- Hvordan har forbruker reagert?
 - Fokusgruppeundersøkelser
 - Smaksprøver
- Merking av fisk til forbruker
- Hvordan er situasjonen i andre markeder

Presentasjonen er basert på resultater fra prosjekter finansiert av Fiskeri- og havbruksnæringens forskningsfond (FHF)

Brettpakkede torskeprodukter

- Marks & Spencer
 - 2003
 - 2005
 - 2010

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 7782 703483 >



READY TO COOK

KEEP REFRIGERATED 0°C TO +5°C

DISPLAY UNTIL USE BY

19 MAR **19 MAR**

PRICE PER Kg 0.244kg

14.99

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

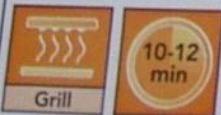
This product is raw fish and must be cooked according to the cooking instructions. As size and thickness of fish may vary, please note that larger, thicker pieces will take longer to cook. Remove all packaging.

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

Line Caught Cod Fillet

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
15 Oct	£ 15.99
PACK WEIGHT	PACK PRICE
0.342 Kg	£ 5.47



0 49896805474



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


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



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



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!



Loxote

£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.

Markedsendringer

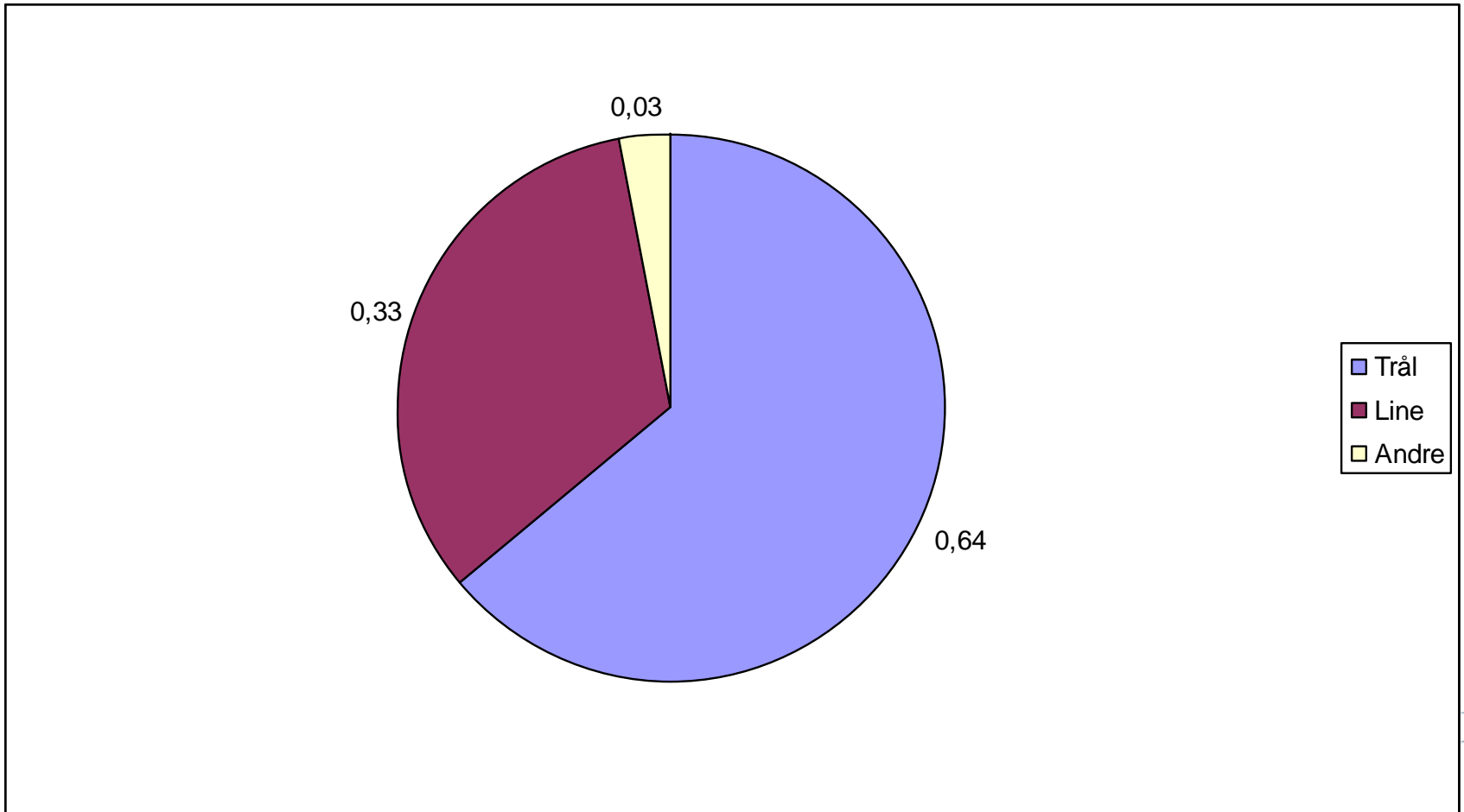
- Tint fisk har fått innpass i en etablert kanal for fersk fisk
- Ferskhet er erstattet av fangstredskap (hook and line) og bærekraft (sustainability)
- Gir muligheter for autolineflåten og ombordfrost råstoff
- Svært mange eksempler på linefanget råstoff

Line Caught Cod Fillets

Cod Fillets from the clear waters
of the North East Atlantic Ocean

Remove all packaging. Place on baking tray in the oven. Bake for 15-20 minutes. NOT suitable for children under 5 years.

Norsk fangst av torsk etter redskap i 2009, fryst råstoff



Bakgrunn for observerte endringer

- Varierende kvalitet og tilgang på fersk torsk i løpet av året
- Hvordan løse denne utfordringen?
- Tinte produkter akseptert av supermarkedskjedene i perioder med liten tilgang på fersk fisk

Stor fleksibilitet

- Britiske innkjøpere og produsenter av brettpakkede produkter tar beslutning om valg av råstoff
- En slik situasjon gir en stor fleksibilitet i valg av råstoff
 - Fersk fisk
 - Filet
 - H/G
 - Fryst fisk
 - Filet
 - H/G
- Ingen sammenheng mellom tidligere behandling av råstoffet (ferskt eller fryst) og utsalgspris
- Profittmaksimering styrer valg av råstoff

Fortrinn til fryst (tint) råstoff

- Tint råstoff er tilgjengelig hele året
- Fisken kan fryses ned når kvaliteten er på topp
- Tint fisk gir grunnlag for lavere transaksjonskostnader
 - Redusert svinn sammenlignet med fersk fisk

Utfordringer

- Økt konkurranse
 - Stillehavstorsk (*gadus macrocephalus*)
 - Fersk torsk (*gadus morhua*)

**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:

Utfordringer

- Konkurransen fra andre råvarekilder
 - Stillehavstorsk (*gadus macrocephalus*)
 - Fersk fisk
- Større forhandlingsmakt for britiske innkjøpere
 - Relativt få aktører styrer et stort marked
- Endringer i markeder skaper muligheter for differensiering
- Morrisons tilbyr kun genuint ferske fiskeprodukter

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

100% of the time!

**Save
£2**

Fresh Smoked Haddock Loin
Melanogrammus aeglefinus
Contains colour

~~£14.57~~

~~£12.29~~

£10.29

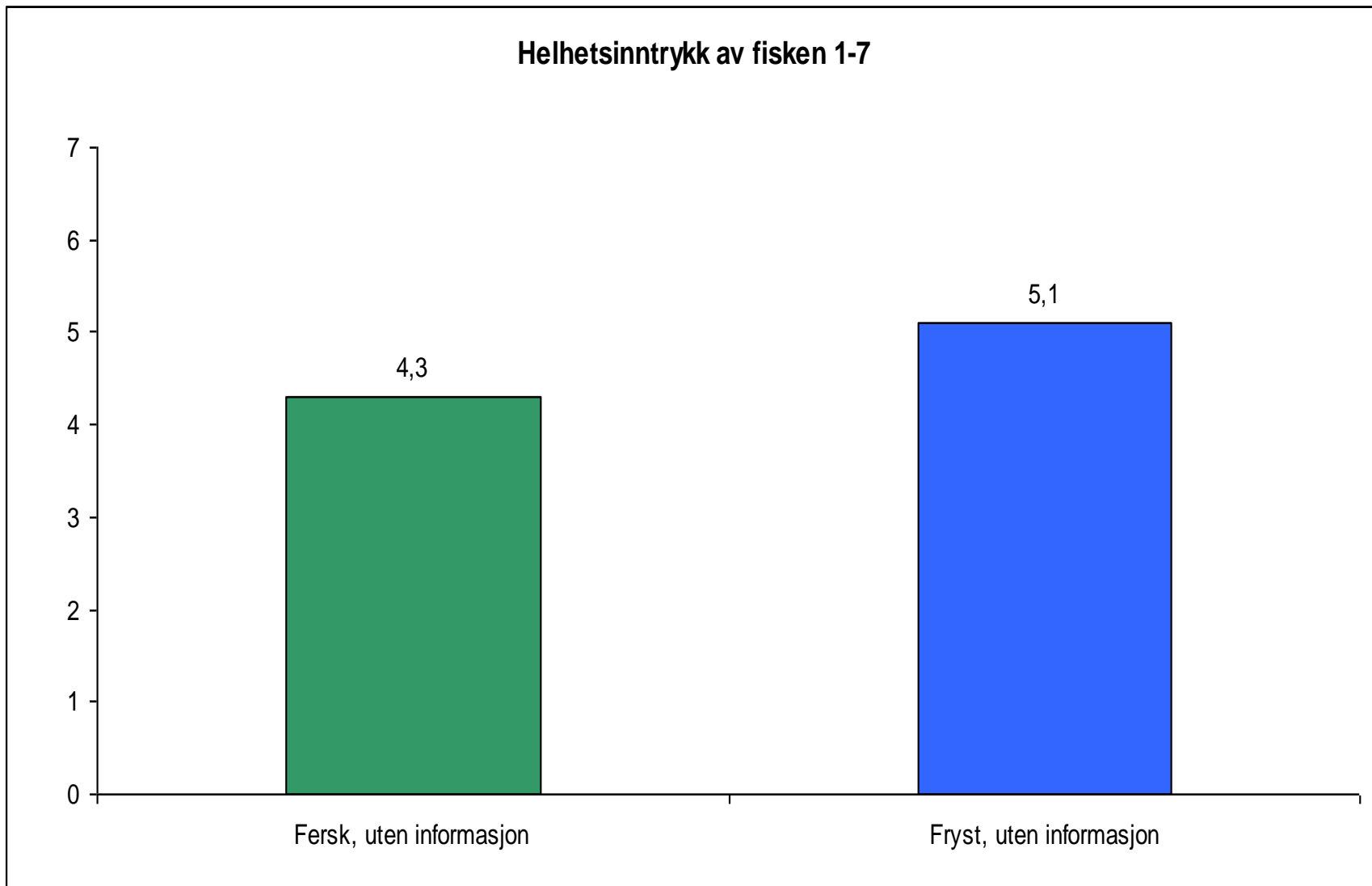
Net Caught in North East
3rd Zist March

Smoked **£9.99**

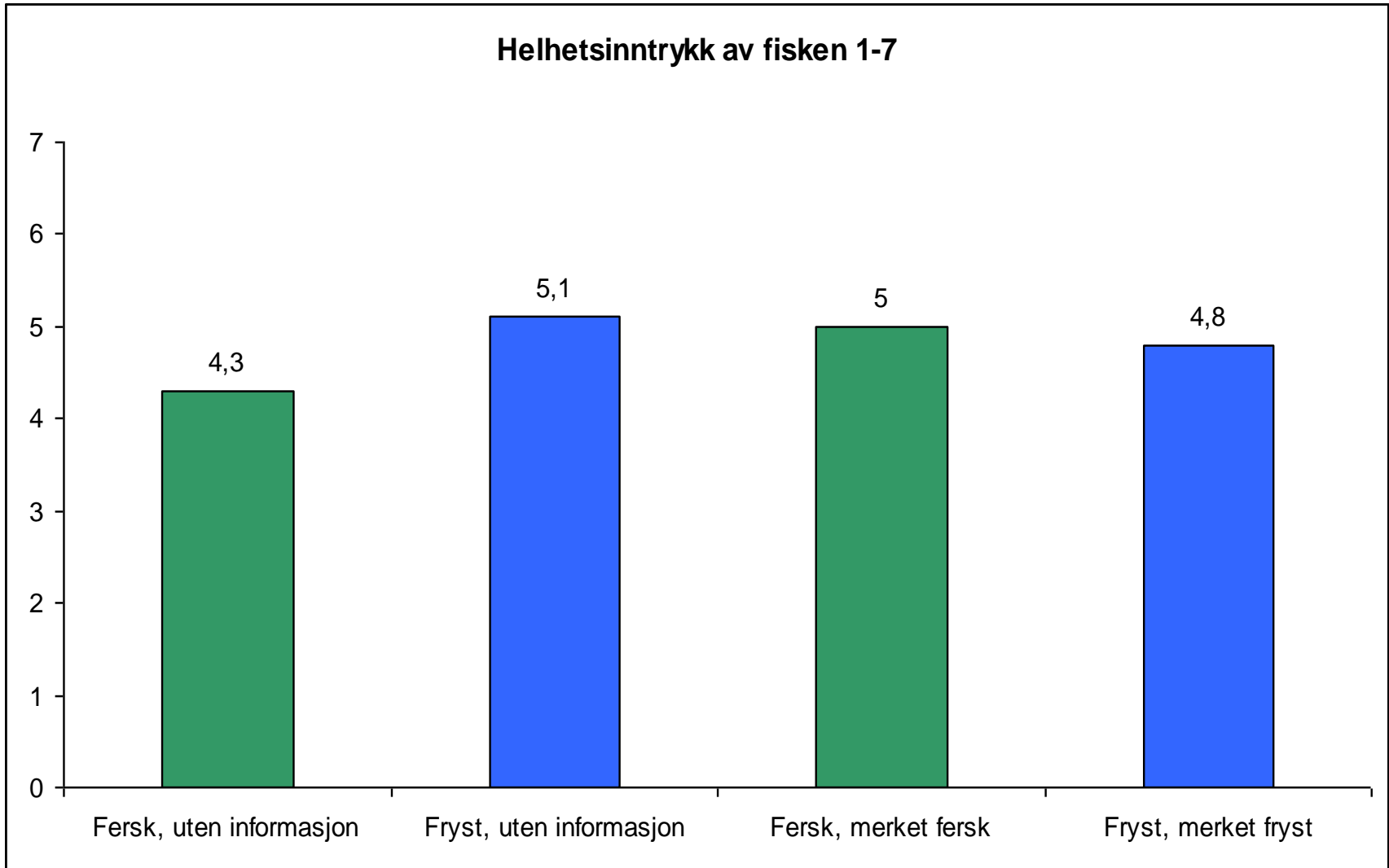
Hvordan har forbruker reagert?

- Fokusgruppeundersøkelser
 - Liten eller ingen kunnskap om endringene i kategorien
- Forbrukers helhetsinntrykk av ferske og tinte torskeprodukter
 - Uten informasjon
 - Med informasjon

Helhetsinntrykk av fisken 1-7



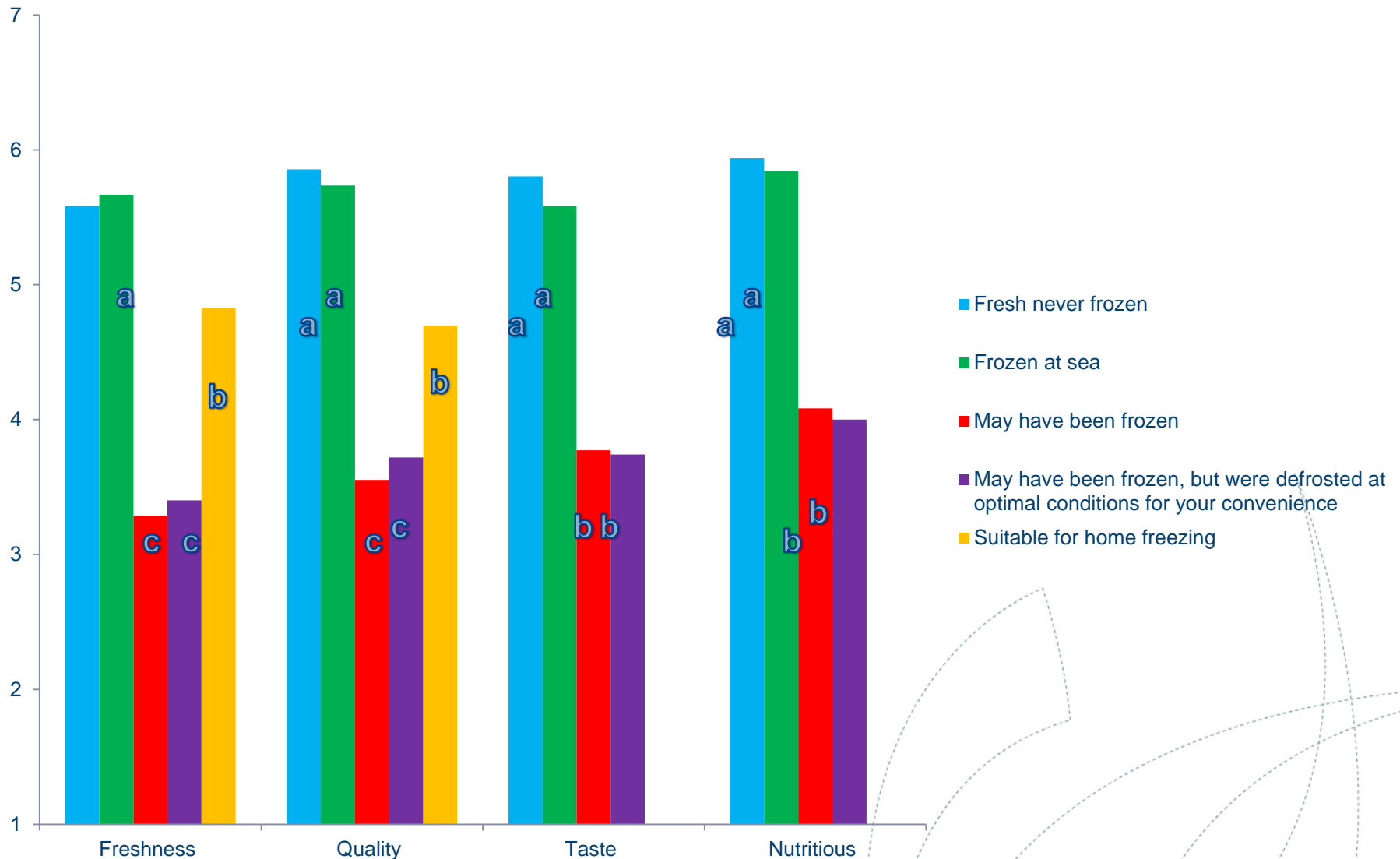
Helhetsinntrykk av fisken 1-7



Merking

- Marks & Spencer 2003
 - "fresh, never frozen"
- Marks & Spencer 2010
 - "may have been frozen"
- Tesco 2010
 - "suitable for home freezing"
- Ombordfryst lineråstoff
 - "frozen at sea"
- Hva forventer forbruker når fisken er merket slikt?

How do you think fish is when it is labelled:



Tint fisk har fått innpass i flere markeder

- Sverige
- Nederland
- Tyskland

Torskrygg

Ekologisk

Vildfångad

199⁰⁰
/kg

3/4 pris 199,- /kg

ICA

Laxfile

Ekologiskt odlad

Salmo salar

209⁰⁰
/kg

3/4 pris 199,- /kg

ICA

ICA

Ekologisk Torskrygg

Gadus morhua
Vildfångad med lina och krok
Har varit fryst

Frisch / Fresh



Kabeljaufilet / Cod fillet

GLOBALG.A.P.

Kabeljauwfilet (lijngevangen)

INGREDIENT: Pacifische kabeljauw (*Gadus macrocephalus*,
vangstgebied Stille Oceaan FAO 067, vis uit duurzame visserij,
vangstmethode: lijnvisserij).

ALLERGENEN: Vis

BEREIDINGSWIJZE: Haal de vis uit de verpakking. De vis
droogdeppen en op smaak brengen met zout en peper.

KOEKENPAN: Verhit boter of olie op een niet te hoog vuur.
Wentel de vis door bloem. Bak de vis in ca. 2 minuten om
en om totdat de vis mooi bruin is.

OVEN: Voorverwarmen op 180°C. Smelt ca. 60 g boter in een
schaal en voeg de vis toe met wat water. Afdekken en in
12 minuten gaar stoven.

MAGNETRON: (600 W) Leg de vis in een schaal met iets boter
Afdekken en in 3 minuten gaar laten worden.

Verpakt onder beschermende atmosfeer

Ondanks zorgvuldig fileren kan er onbedoeld een graatje in
de vis zijn achtergebleven.

Dit is een ontdooid product en kan niet opnieuw
worden ingevroren.

Voedingswaarden per 100 gram

Energie: 375 kJ/89kcal

Eiwit: 18,3 g

Koolhydraten: 0,0 g

Suikers: 0,0 g

Totaal vet: 1,7 g

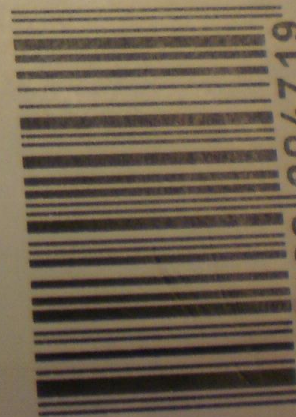
Verzadigd vet: 0,4 g

Voedingsvezel: 0,0 g

Natrium: 0,10 g

2 van 2

Bewaartemperatuur maximaal 7°C



2 310100 204719

Loïc, poissonnier et mousquetaire

du 19 au 23 octobre
Intermarché *Merée*

Dos de cabillaud
15,90 € Le kg
Dos de cabillaud

Noix de pétoncles coraillées
11,90 € Le kg
Noix de pétoncles coraillées
Aequipecten opercularis

*Pêché en ATLANTIQUE NORD-EST ou élevé EN NORVÈGE

Pêchées en ATLANTIQUE NORD-EST

Cabillaud à la coupe
9,90 € Le kg
Cabillaud à la coupe

*Pêché en ATLANTIQUE NORD-EST ou élevé en NORVÈGE

Tourteau
3,90 € Le kg
Tourteau vivant issu d'une pêche responsable**

Pêché en ATLANTIQUE

Avslutning

- Markedsobservasjoner viser at tint råstoff har fått innpass i etablerte kanaler for fersk fisk i flere europeiske markeder
- Fangstredskap og bærekraft har erstattet fokuset på ferskheter
- Nye muligheter for ombordfrost råstoff fra lineflåten
- "Frozen at sea" oppfattes som bedre enn "may have been previously frozen" av forbruker

Råstoff fra lineflåten

Muligheter i etablerte kanaler for fersk fisk

Finn-Arne Egeness