

# 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





# 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.



The menu comes after the Royal Zoological Society of Scotland



# 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 = Guidelines 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 CH49 9QS  
marksandspencer.com

UK BB 011 EG

**DISPOSAL**  
PACK  
plastics  
NOT CURRENTLY RECYCLABLE

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



**SCOTLAND**  
OF FISHERY & MARINE  
Excellence Awards  
Fish and Seafood  
Winner 2018

**QUALITY FOOD AWARDS 2008**  
WINNER

**WIN**  
BREAK IN  
SHETLAND  
LUXURY  
NORTH LINK  
Enter at  
[www.SHETLAND.org/prize draw](http://www.SHETLAND.org/prize draw)  
See participating retailers for full terms & conditions and website.

**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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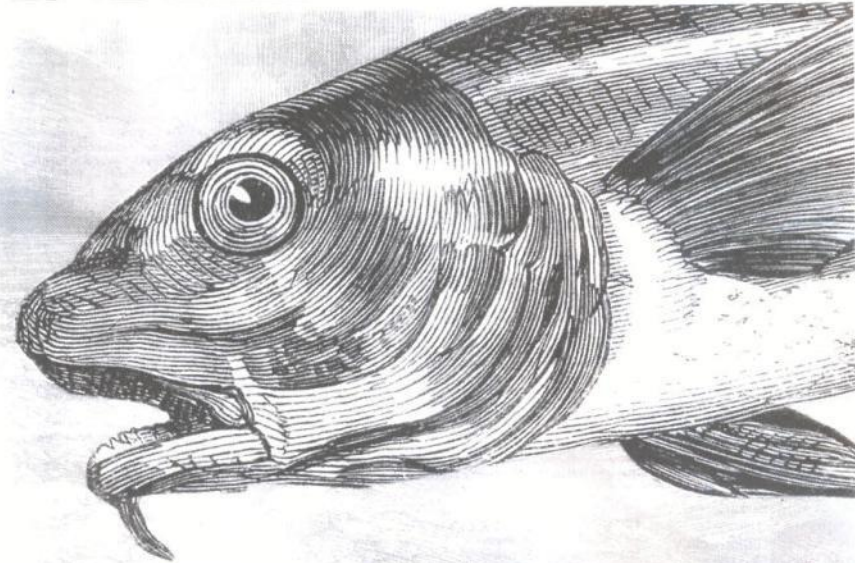
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## The 50 Best Festivals

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

For comprehensive information about a range of fisheries...

**MSC Book**... The MSC Book provides comprehensive information on fishing methods and the good for communities and the environment...

**The Marine Conservation Society (MCS)**... MCS is the production of 'Good Fish'... MCS is a not-for-profit organization...

**Pocket Good Fish Guide 2006**  
A quick reference to buying 'eco-friendly' fish

**Why buy eco-friendly fish?**  
Consumers can make a real difference to the world's oceans... by buying fish that are sustainably managed...

**Look at labelling information**  
For more information on the MSC logo... look for the MSC logo on the fish...



<b>OceanTraders</b>	<b>OceanTraders</b>
<b>MSC Fillet Fish Fingers</b>	<b>Fillet Fish Fingers</b>
Caught From Protected Fisheries - Cert. By The MSC	
450g	450g
<b>1.69</b>	<b>1.49</b>
1KG = €3.756	1KG = €3.311



# 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 fish products. The left tag is for 'OceanTrader MSC Fillet Fish Fingers', priced at 1.69 per 450g unit, with a 1KG price of £3.758. The right tag is for 'OceanTrader Fillet Fish Fingers', priced at 1.49 per 450g unit, with a 1KG price of £3.311. 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](http://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 complex communication space. The fish are rendered in various colors and orientations, including a large red fish at the top center, a grey fish on the right, a brown fish at the bottom right, and a spotted fish at the bottom left. 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



ALPAMERON

- Special packaging helps to maintain the cool temperature of the fish
- Prevents leaks and contaminations
- Reduces smell
- Can be left in packaging until ready for use
- Remove all packaging before cooking
- Freezable

Weight	Type of Fish	Quantities Portions (as sold)	Cooking Method				Cooking Time (minutes)		
			Grill	Shallow Fry	Deep Fry	Steam	More water	Deep fry	
90g	Cod fillet	1	8	8	8	20	15	2	
90g	Cod fillet, smoked	1	8	8-10	6	20	15	2	
100g	Crab sticks, portion of	1.5	Ready to eat						
120g	Haddock fillet	1.5	10	10	8	20	15	2	
120g	Haddock fillet, smoked	1	8	8-10	6	20	15	2	4-6
150g	Halibut steak	2.5	8-10	6-8	8	20	12	2	4
120g	Kipper fillet	2	5	*	3	10	*	5	*
170g	Lemon Sole fillet	1.5	5	4-5	5	15-20	10	15-2	4-6
150g	Mackerel fillet	6	5	7-8	*	15-20	*	15-2	*
150g	Mackerel fillet, smoked	10	Ready to eat						
130g	Plaice fillet	2	5	4-5	4	15	9	2	4-6
60g	Prawns	1	Ready to eat						
135g	Salmon fillet	3	12-15	5-8	5-8	12-15	12-15	2	*
142g	Salmon steak	3	12-15	5-8	5-8	12-15	12-15	2	*
60g	Salmon, smoked	1.5	Ready to eat						
100g	Sardines, raw	3	8	*	*	*	*	*	*
150g	Trout fillet	2	8-10	7-5	*	10-12	10	2	*
100g	Tuna steak (fresh)	1.5	8	6-8	*	20	*	2	*





# Pack communications





### LINE CAUGHT COD 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 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

#### 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.



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

#### DISPOSAL

PACK



plastics

NOT CURRENTLY  
RECYCLABLE

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

29 OCT

DISPLAY UNTIL  
USE BY

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



# 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 Wild Caught 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  
£6.35 lb

Fresh  
Golden  
Trout  
Trafalgar Estate  
£6.99  
kg  
£3.17 lb



Billingsgate wholesale market, London

