

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

6 NEWS



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 move comes after the Royal Zoological Society of Scotland



More competitive, diverse & dynamic



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



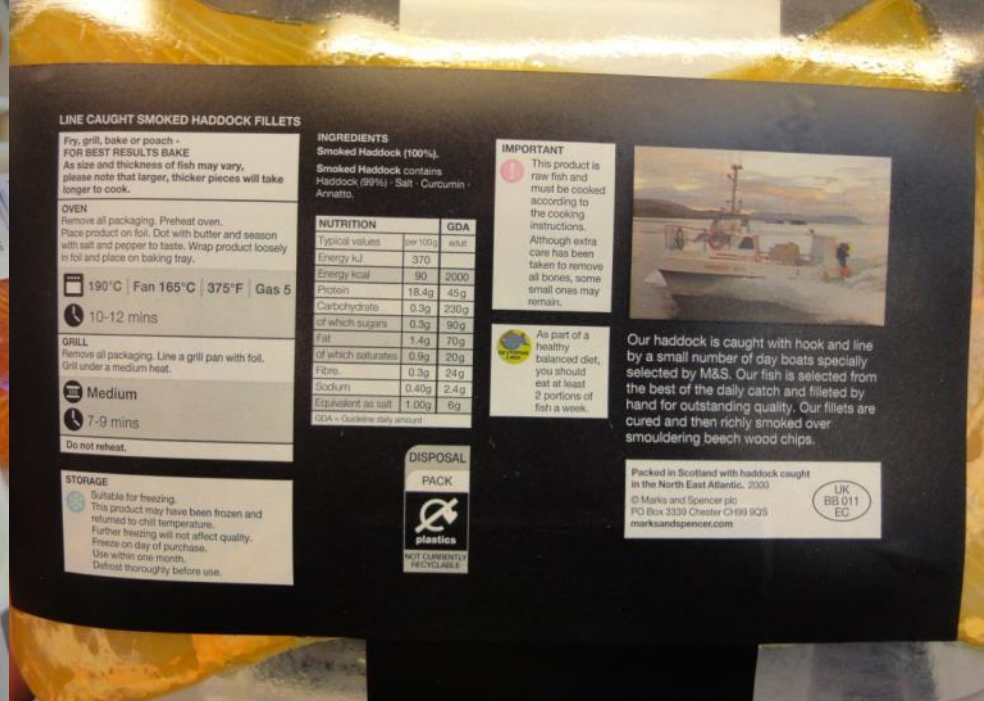
Price: diverse positions adopted



Creating values

- Are core attributes of fish fully utilised ?
- Are USPs of fish exploited?





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

FRANCE SPECIAL

Paris for teenagers + The brutal beauty of Brittany + Soaking up the good times in Cannes + St Malo

Plus The complete guide to Provence in the full-colour Traveller magazine

SATURDAY EDITION INCLUDES THREE MAGAZINES AND 24-PAGE SPORT SUPPLEMENT

THE INDEPENDENT

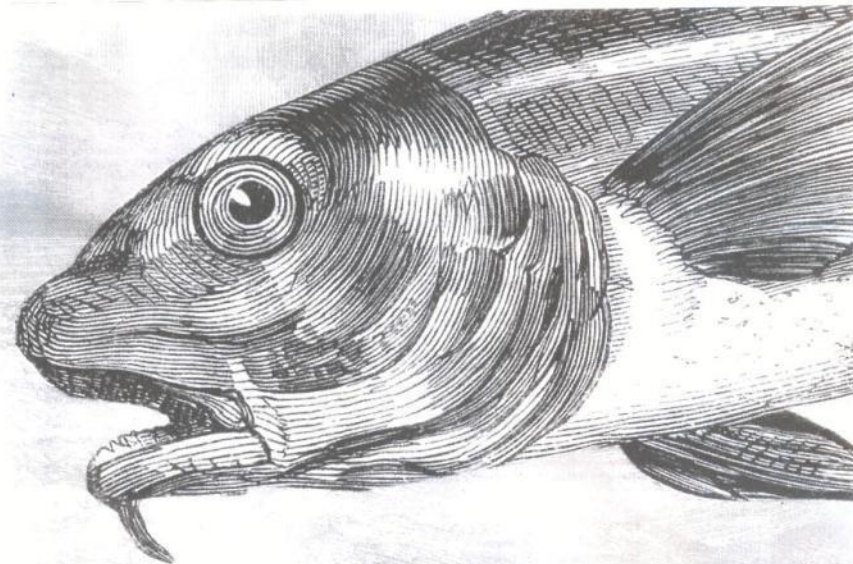
www.independent.co.uk

SATURDAY 15 MAY 2010
Number 7,355
£1.60 Ireland €1.90



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

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IN THIS SECTION

Armando Iannucci
Fear, loathing -
and optimism

PAGE 10



Christina Patterson
Gordon Brown is
happy - hooray!

PAGE 17



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



???

ZZZ

Interpreting complex messages



Willingness to pay price premium?

Lidl, Scotland Oct 2010



OceanTrader

MSC Fillet Fish Fingers

Caught From Protected Fisheries - Cert. By The MSC
450g

1.69

05644 1KG = £3.758 4 M

OceanTrader

Fillet Fish Fingers

450g

1.49

1KG = £3.311 4 M

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

YOUR **M&S**
look behind the label



Additional communication channels

The background of the slide is a stylized illustration. It features several fish of different species and colors (red, silver, brown) swimming in a blue, swirling, abstract environment that resembles water or a complex communication space. The fish are positioned around the text, with some appearing to be part of the swirling patterns.

- 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

A large group of fish, likely salmon, are swimming in turbulent, dark water. The fish are silvery and sleek, with some showing a hint of pink on their sides. They are moving in various directions, creating a sense of a large school or a feeding frenzy. The water is dark and choppy, with many small ripples and bubbles. The overall scene is dynamic and energetic.

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

Seal in packaging until ready to use. Peel off all packaging before cooking (or freeze)

SEALED FOR YOUR PROTECTION

Not recommended for this cooking method

ASDA
Fish
Make a meal of it...

- Cooking, prep
- Want it to taste
- We'll be happy to
- Just ask your ASDA Fishmonger
- Always happy to help

ASDA
SKIN HAD BLOC UNDOVE
23-11-08
9.95 2.52 1

Just ask our advice

Just ask our advice

[illegible]



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

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



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

17.99

0.224 Kg

PACK PRICE

£ 4.03



041607 804035 >

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
fish



Scottish
kippers with butter

Our sustainably sourced kippers
are delicious simply
boiled in the bag



SGS-IMP-MSC-C-1002



SUITABLE FOR
FREEZING

200g e

DISPLAY UNTIL
USE BY

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

Line caught Mackerel: Waitrose May '10



Line caught Pollock: Waitrose May'10



Billingsgate wholesale market, London

