

## Overview on aquaculture product differentiation

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## Overview of inventories and analyses of seafood market studies

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**SUMMARY** – The paper provides an overview of the inventory of *ad hoc* studies concerning the seafood market studies in the participant countries. The work was based on a typology established after a phase of exploratory research following an analytical common framework. Presentation of the results is achieved through a thematic synthesis of the returns, having regard to the particular needs of aquaculture producers. Most of the *ad hoc* reports produced originated from private sectors organisations, with a limited provision from public sector. The frequency and detail of coverage of reports tended to be generally a function of the size and value of the markets concerned. Pan-European coverage of the markets for aquatic products was unsurprisingly poor. The compilation and review of the *ad hoc* surveys has identified a number of common deficiencies which warrant consideration if more added value data are to be made available to producers of new aquaculture products.

**Key words:** Aquatic products, ad hoc studies, inventory, analysis.

**RESUME** – "Bilan des inventaires et analyse des études de marché des produits aquatiques". Ce texte présente un bilan de l'inventaire des rapports d'études de marché des produits aquatiques disponibles dans les différents pays participants. Le travail a été fondé sur une typologie, après une première phase exploratoire utilisant une grille commune d'analyse des documents. La présentation des résultats est une synthèse bâtie en fonction des besoins des producteurs aquacoles. La plupart des rapports disponibles ont été réalisés à la demande du secteur privé, le secteur public étant à l'origine d'une part limitée de ces études. La fréquence et le niveau de détail des études sont généralement liés à la taille et à la valeur des marchés. Une couverture pan-européenne des marchés est très rare. La compilation des rapports d'étude disponibles a permis d'identifier des lacunes communes qui méritent considération dans l'optique de mettre des informations élaborées à la disposition des producteurs de nouveaux produits aquacoles.

**Mots-clés :** Produits aquatiques, études de marché, inventaire, analyse.

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### Introduction

This paper provides an overview of the results of the work undertaken by MASMANAP partners in respect of Task 3 of the work programme. The work aimed to identify and analyse the various *ad hoc* secondary data publications which exist within the participant countries. It is established practice within marketing research that secondary data sources should be consulted first in any market research enquiry because this will represent a more efficient use of resources. Once all secondary data sources have been identified and evaluated, the collection of any required primary data can be planned and undertaken.

However whilst this consultation of secondary data before primary data is widely accepted, a fundamental problem results from the very disparate nature of secondary data sources. Secondary data appear in a wide variety of formats and sources which may prove to be of particular relevance to an enquiry but may be obscured from mainstream channels of enquiry or access. As a result, potentially valuable sources of secondary data are commonly overlooked and this reduces the efficiency of the marketing research budget or may mean that the research is abandoned. Failure to identify relevant secondary data sources is especially likely where data searches are to be undertaken across a range of international markets, as is commonly done within Europe. Despite the notional existence of the Single Market many EU member states, and other countries which have elected not to participate quite so fully in the Euro ethos, display often discrete, distinctive national characteristics and peculiarities which are manifest in country-specific market data. Given the mutual desirability of more transparent information on all European neighbours, and others too, it was considered appropriate to attempt some comparative analysis of the data sources available.

At the inception of the programme it was agreed that it was useful to distinguish between the various *ad hoc* sources of secondary data provision as opposed to the much wider range of continuous official and semi-official data that exist. *Ad hoc* surveys were defined as those produced, from whatever source, as discrete one-off publications concerned with the market for fish and fish products. Some possible ambiguity may exist where a series of *ad hoc* surveys are produced over time, as is the case with a number of country market reviews. However for the purposes of this programme this potential anomaly was identified but discounted; any such series is incorporated within this task.

## Methodology

In order to provide effective and efficient comparison of the secondary data sources available a MASMANAP typology was promulgated to capture the essential elements of the publications. Construction of the typology was preceded by a phase of exploratory research so that the scope of the data set could be established within realistic and meaningful boundaries. Expeditions to the frontiers of secondary data within the domain of each project partner produced a wide array of data with an unpredictable combination of overlaps and unique, yet quite ubiquitous, aspects of data differentiation.

Upon examination of the results returned, an analytical framework was circulated so that any national quirks and indigenous traits might be homogenised within the programme. A brief outline of the more salient features is warranted in order to explain the details agreed. Standard bibliographic details including author, title, ISBN, publication date, place and publisher were recorded simply to enable precise referencing and cataloguing of the sources. The geographical area covered by each report was also noted as was the time period and the price of the publication, although it was recognised that this might vary according to participation in subscription services and/or qualification for some other reduction.

In an attempt to categorise the variety of sources found a tripartite division of "official", "semi-official" and "others" was established to reflect the varied level of government input. This ranged from autonomous government sources in the case of "official" publications, government agency with some industry linkage in the case of "semi-official" through to the private sector with the "other" category. The primary data collected and reported within the study was also categorised in an attempt to provide more meaningful comparisons. Classification of the data covered criteria such as the number of respondents, the date of any survey period and the subdivision of results. The construction of the sample and its focus upon consumption or purchase phenomena also helped to clarify the data for the purposes of potential comparison with other surveys.

The data collection instruments were also categorised to cover those using more formal structured questionnaires and their mode of collection: face to face, postal, telephonic or electronic. Other techniques including in-depth interviews, focus groups, diaries, observation, experimentation and any alternatives were noted, again to provide more comparative analysis. The classification of the product data according to its form (e.g. frozen, chilled, etc.) and product type (e.g. whole fish fillet, etc.) also gave a useful means to assess the level of detail provided. Individual returns also provided a summary of the key findings of the report with added commentary on their actual and potential application to the aquatic food marketing chain. A critical perspective on the report was also provided by each correspondent, through the identification of any particular deficiencies pertinent to the aims of the MASMANAP programme. Whilst on occasion this assumed hypothetical provision, the additional potential contributions highlighted did help to envisage what might be construed as more perfect information provision. Clearly at this current moment in time this might tend to border on the over-ambitious, if not the ridiculous, but arguably it does provide useful goals for future information and communications technology (ICT) provision.

## Results

Presentation of the results is best achieved through a thematic synthesis of the returns rather than a discrete monologue of each and every report submitted. By definition *ad hoc* reports soon tend to become dated, and in any event the purpose of Task 3 is not to present a comprehensive review of all the individual reports; instead it is to draw conclusions from their analysis as to how such information

provision might be improved upon in the future, having regard to the particular needs of aquaculture producers.

Most of the *ad hoc* reports produced originated from private sector organisations, although some limited public sector provision was also noted. Private sector publishers cover a wide spectrum ranging from seemingly small market research agencies through to much larger transnational organisations involved in a range of different market sectors. Where public sector bodies were active, the subject matter often tends to be rather more diverse and provides a valuable breadth of coverage. Further, often more specialist, *ad hoc* investigations emanated from NGOs and academic institutions; in some cases these were found to be of particular value but the generally more restricted breadth in terms of the entire market was a significant limitation.

Given the private sector organisations' profit objective it is perhaps unsurprising to find that the frequency and detail of coverage of reports tended to be a function of the size and value of the markets concerned. Whilst this did mean that certain markets, notably the UK and France were covered in some detail, the analysis commonly included a significant element of repetition and thus curtailed the boundaries of new knowledge and understanding. This is especially significant if reports are to be used as a mechanism to identify markets for new products since typically these are likely, in the first instance at least, to be small emergent sectors which may readily be overlooked because they indeed exist beyond the boundaries of common knowledge.

Despite the general tendency for there to be more reports on the larger markets, at least in terms of population size, in some cases this was not found. For example in Germany there appears to be a comparative paucity of provision. Whilst this may well reflect the considerable variation in fish consumption within the German market, and their beef focus, the survey did identify a potentially significant gap in market intelligence. Similarly in other markets where per capita consumption of fish is high, detailed reporting was found to be lacking. In particular Spanish returns highlighted a general absence of detailed coverage apart from more basic components of market data. In contrast to this, returns in respect of the Norwegian market provided a detailed understanding of some of the more intricate aspects of the Norwegian consumers' mindset in respect of fish buying behaviour. Elsewhere the limited coverage of many of the smaller markets highlights an important deficiency because although small in aggregate terms, these markets may well contain significant segments ideally suited to the initially lower volumes of a newly launched product.

Given the variation in apparent understanding of the component markets, pan-European coverage of the markets for aquatic foods was unsurprisingly poor. When undertaken, provision tends to reflect only the mainstream countries which are commonly already available and duplicated elsewhere. The limitations of this more secular reporting are significant because it makes it more difficult to get an accurate comparative contemporary perspective on alternative market opportunities. Moreover in the case of some of the more specialist new products that might be produced, targeting markets with quite precise characteristics, it may be important for producers to distribute their product across a range of different countries rather than remain constrained by outdated notions of national boundaries and population divisions.

The challenge of interpretation between discrete national reports is also heightened by the discontinuous time periods covered, a situation which tends to necessitate quite crude interpolation and forecasting of market trends. Although the reports, in some markets at least, do appear to be published more frequently than has historically been so, significant discrepancies remain. Notwithstanding the limitations of the modernity of the data, the underlying cost of data acquisition is raised where producers need to source from a range of publications. *Ad hoc* reports have a significant price range, but generally are skewed towards the more costly and to levels which many smaller producers might regard as prohibitively expensive.

The instruments employed in the market research typically vary between publications and commonly use different questionnaires covering unique subject areas. Whilst this may be perfectly justifiable in the context of the country research being undertaken it does tend to limit the scope for *post hoc* comparative assessment. Typically the returns indicated an emphasis upon quantitative rather than qualitative research. Whilst such data are useful they are, by definition, limited in providing explanations for the observed phenomena and so leave essential explanations unanswered. Clearly the variable coverage of many reports makes it more difficult for prospective purchasers to determine

the financial return from buying any individual report, especially where this can only be done on a remote basis.

The propensity to purchase reports unseen is heightened further by the quite disparate standards of product coverage. To some extent this necessarily reflects the still quite varied tastes of the European consumer, but varying degrees of emphasis upon different product categories do tend to produce frustrating inconsistencies. In particular more precise details of product specifications are often not fully reported, yet such information is typically required to make even preliminary assessments of the opportunities for market entry. The use of inconsistent terminology was also noted, often without fully correct translation, and this simply adds further to the uncertainty engendered.

Perhaps because of the vagaries alluded to in respect of the product categories, market profiles are often confusing and leave somewhat blurred demarcation between the various segments. A common occurrence is to aggregate markets so that many smaller market segments and niches are obscured. Again this is of particular concern to prospective market entrants and purveyors of new products who will typically seek to penetrate such target markets as a starting point. Within individual country markets important regional divisions also exist and in some cases, diametrically opposed differences may be observed. This highlights the importance of acquisition of market knowledge at a variety of scales and certainly beyond the level of provision found in most *ad hoc* reports.

The purchase and consumption of fish at home is much more commonly reported than that which takes place away from the home in catering sectors. Generally the away-from-home market is inferred to be of lesser importance, but this may well owe more to the more fragmented and less-readily available data than anything else. Yet in the case of the launch of new products unfamiliar to the consumer it is precisely within the catering market that initial forays may be made. This strategy is adopted because away from home, product solutions can be prepared and offered directly to the consumer rather than relying upon the consumer to solve the intrigue posed in many new product experiences.

## Implications for aquatic food data drivers

The compilation and review of the *ad hoc* surveys reported by the project team members has identified a number of common deficiencies which warrant consideration if more added value data is to be made available to producers of new aquaculture products. Whilst the time lag of data provision has generally improved coverage at the cross-country level still tends to suffer from being out of date. Reactive data has its role in enabling trends to be identified but in an increasingly dynamic aquatic food market environment greater demands are evident for more proactive data. This is particularly important where producers are attempting to identify forthcoming trends so that new product concepts might be identified, created and then launched.

The whole emphasis of much of the data available tends to the more descriptive, but non-explanatory quantitative coverage. As product differentiation becomes more complex and subtle in its USPs, understanding more precisely why one product may be preferred to another is increasingly important. Critical data perspectives are required to bring out such understanding and to help highlight where real opportunities might lie. Without such more detailed appreciation new product failures are all the more likely, if not inevitable.

Acquisition of better data of course carries a cost associated with the tasks of gaining awareness, access and utilisation. Not all producers may perceive such marginal costs to be warranted by the additional revenue generated. However as ICT benefits unfold and diffuse through the sector it seems likely that such gains will cost less in real terms. Even within the last 3-5 years the scope for individuals to construct more tailored *ad hoc* studies has increased quite dramatically with growth through quite mainstream Internet sites. Whilst the routine proactive provision of data fashioned precisely to individual needs is yet some time away for many, the expectations from the standard provision of *ad hoc* studies are firmly set on course to grow further still.