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Strategies to foster the marketing of aquaculture products developed by Spanish producers

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SUMMARY - This presentation aims to analyse, in the case of Spain, strategies and co-operation for Marketing development of Aquaculture products at national level. An analysis of the problems that arise in the Marketing of Aquaculture Products in Spain are discussed at the same time as the strategies of the Spanish Aquaculture producers are presented. Special emphasis should be devoted to strategies as identification of products through their guarantees of origin, and the development of local and international markets through the adaptation to consumer gastronomic and cooking demands. Finally, the author defends the strategy that Mediterranean Aquaculture producers should utilize the concept of "Mediterranean diet" in order to enlarge markets.

Key words: Aquaculture, Spain, marketing, strategies.

RESUME - *"Stratégies pour promouvoir la commercialisation des produits aquacoles développés par les producteurs espagnols". Cette présentation a pour but d'analyser le cas de l'Espagne, en ce qui concerne les stratégies et la coopération visant au développement de la commercialisation des produits aquacoles à l'échelle nationale. Les problèmes qui surgissent dans le cadre de la commercialisation des produits aquacoles en Espagne sont analysés et discutés, et en même temps sont présentées les stratégies des producteurs aquacoles espagnols. Une attention spéciale est portée aux stratégies telles que l'identification des produits à travers leur garantie d'origine, et au développement de marchés locaux et internationaux moyennant l'adaptation aux exigences gastronomiques et culinaires des consommateurs. Finalement, l'auteur défend la stratégie selon laquelle les producteurs aquacoles méditerranéens devraient utiliser le concept de "régime méditerranéen" afin d'élargir leurs marchés.*

Mots-clés : Aquaculture, Espagne, commercialisation, stratégies.

ACTIONS AIMED TO AQUACULTURE ASSESSMENT AND QUALIFICATION

From the very moment these products broke into the market, aquaculture products have had to endure fishing sector's rejection, both at a industrial level and from small fishers. They misunderstood aquaculture's aims and had a completely wrong viewpoint for they felt it was a new competitor against their activities. The right aim is that aquaculture is a complement to fishing.

Moreover, aquaculture will be a long-term benefit for fishing; as well as it will be an intelligent policy to add both sectors' synergies, which would improve its image and would increase the market of products and proteins from a sea source.

In this framework, Spanish Aquaculture producers have taken a wide range of measures in order to sensitize public opinion of the special properties that aquacultured products present, as well as of the basic principles upon which these actions are based. Its main goal was that of highrising qualities:

- Fresh produce
- Size standardization
- A continuous market availability
- Suitable packaging as per each market
- Sensibly balanced prices

Through the Spanish Government some measures have been taken in order to let out and spread these properties, and we could mention, as an example, some concrete widespread measures, in some species such as:

- Trout
- Mussel
- Other local species.

We should emphasize that official operations were not too many, and we need a more powerful action in order to improve and let aquaculture products' true image be known.

ACTIONS AIMED TO IDENTIFY THE PRODUCT

To identify the product so that it is not either intentionally or unintentionally confused or mixed up with other similar products, is considered one of the priority tasks.

In practice we can too often see that some similar or completely different species are offered as a gilthead bream, confusing unexperienced housewives, and providing an unloyal competitiveness based on the buyer's ignorance. Unfortunately, these practices are too often used with products coming from industrial fishing, and the Authorities in charge of consumers' defense, sometimes pretend not to notice such big frauds and fakes as offering:

Gilthead bream, when in fact it is Common Bream
or Red Bream.
or Red Surmullet.
or Sea Bream.
or another kind of sparidus.

Sea bass when it is *Dicentrarchus punctatus*
or muggine

This fraud is even worse in the case of fishing, especially in handled and/or filleted products. We could make a very long list with the products being offered in the market whose market names do not coincide with the species they come from.

This usually consented guile is causing much harm to the sea produce and aquaculture market, and it is growingly becoming necessary that Public Associations and Organizations strongly fight these practices in order to do away with customers' current confusion and misinterpretation. Aquaculture producers tend to preserve and keep the name and identification of the product.

We anyway think that it is Government, especially local government that should keep watch over the purity of practices so that all that is offered in the market truly fits and corresponds to the species shown in the offer.

PROCEEDINGS AND REPORTS AS REGARDS

- Species
- Classifications
- Sizes
- Packaging
- Continuous availability
- Pricing

Species

The Aquaculture products being most firmly rooted in the Spanish Market are as follows:

- Mussel
- Trout
- Gilthead Bream
- Sea Bass
- Turbot
- Clams
- Oysters
- Eels
- Prawns

Classifications

Each product has developed a type of classification on the basis of a principle, namely on culturing ways or methods, such as for instance:

- *Mussels cultured at flat-bottomed boats*
- *Mussels cultured at long lines*

- *Trouts from the pyrenees*

- Deepwater Gilthead Breems
- Salt-pans Gilthead Bream
- White Gilthead Bream
- Black Gilthead Bream

- Salt-pans Sea bass
- Deepwater Sea bass

- Fine Clams
- Semi-fine Clams
-

Sizes

Today offers - have been homogenized so that they meet the various market requirements and needs and with the purpose of avoiding confusions as per each producer's classification.

Mussels are presented to the market in their:

- Big
- Medium
- Small

Versions.

The *Gilthead bream* gradually reaches the following grades:

- | | |
|-----------|--------------|
| - Big | 400/600 grs. |
| - Special | 300/400 grs. |
| - A | 200/300 grs. |

The *Sea bass* is classified as:

- | | |
|-------|--------------|
| - BIG | 400/600 grs. |
| - A | 300/400 grs. |
| - B | 200/300 grs. |

In the heart of APROMAR (Association of Producers of Sea Cultures, Spain) market sizes are discussed and adapted with a view to providing a better information to both home and foreign customers.

Packaging

There are no standardized models in this sector as it is assumed that the producer must tackle each individual customer's needs and characteristics.

There are many packagings ranging from the 1 Kg. box to the 12 Kg. box and from the rectangular and square shape varying in height for the ice space to any other different form. The most commonly used material is "expanded polispan" and the health requirements of the EU guidelines are always met.

Continuous Availability

Aquacultural products are available in the different Spanish markets every single day of the year; this availability is increased in the times when need is highest and it is sufficiently available at times when need is lower or when the species captured are more numerous.

Sometimes, specially at times when consumption is lower, market presence means a momentary damage for the producer.

But must be stressed that doing so has allowed to increase the market share upon the basis of a constant supply.

Pricing

Spain has always been a sea products consuming country, its Mediterranean vocation and its fishing tradition have shaped which may be Europe's most important fishing country. But together with this positive feature, other conditions have made it a very *demanding* and at the same time *populist* market.

Spain consumes approximately 40 Kg. of fish per person and year. This shows that most Spanish people consume fish and therefore know about the qualities of fish.

It is easy to check in the official sales statistics how drastically prices fluctuate depending on quality and season and the reflection revailing at the spanish market is to see how quality distances itself from prices.

It can be guaranteed that there is a market for very fresh fish, which is very far away from the reasonably fresh fish and still further away from the fish coming from industrial processes even though considering that its quality may be acceptable, in the range of a parallel European market.

Summing up: In Spain very good fish, which has been fished that very same day is much more worthile than fish of an acceptable, in the range of a parallel European market.

Frozen fish is a separate issue which is not affected by aquaculture yet.

IDENTIFICATION THROUGH GUARANTEES OF ORIGIN

All aquacultural products are being sistematically identified by means of a guarantee of origin.

We understand that once the product has been valued and identified it must be related to its place of origin, that is the reason why among others, the following terms are applied:

Mussel from *Arosa*
 Mussel from *the Rias Altas*
 Mussel from *San Carlos de la Rapita*

Gilthead bream from *la Costa Brava*
 Gilthead bream from *Straits of Gibraltar*
 Gilthead bream from the *Mediterranean sea*
 Gilthead bream cultured at *Salt-pans*
 Gilthead bream from the *Atlantic sea*

Clams from *Carril*
 Clams from *Huelva*
 Clams cultured at *Salt-pans*

Trouts from *Navarre*
 Trouts from the *Pyrenees*
 Trouts from *Galicia*

To know the guarantee of origin is a quality, safety and identity factor for consumers.

OUTLOOK AND HEALTH CONDITIONS

It is essential to look after the appearance of the final product.

A rule of all Spanish producers is to set aside those faulty articles avoiding mixing them with good quality ones. There is a market for deformed products which must **never** get mixed up with those of standard growth.

The boxes are unmistakably identified.

Health conditions adhere strictly to the EU regulations and the trend is to fish no more product than it is sold or assigned. The above implies that the product which reaches the final consumer has a high level of freshness and quality.

Spanish products comply with the mandatory rule that fish should not be fed before being fished out.

HOME MARKET

To adapt them to the home gastronomic special cooking issues and uses

The special features of the Spanish market makes producers adapt to the peculiarities

of the regional gastronomy which is rich and varied. Preferences as regard to size, time of the year and species are very different among the various Spanish regions.

On the other hand, the particular demand of the Spanish Market forces to fish on a daily basis in order to satisfy the demands for "very, very fresh" fish. The fishing, transport, packing and logistics are bigger than in other countries but only assuming them it is possible to give an answer to the demands of elitist products.

There is a wrong practice which involves big markets' saturation giving rise to spectacular price drops. In order to counteract the above mentioned price drops, producers tend to establish a distribution in networks covering all customer demands, both in the interior and on the coastline.

INTERNATIONAL MARKETS

Traditional markets

The strategies for the International Markets are diametrically opposed to those for the Home Market. The main countries which consume Spanish aquacultural products are:

- France
- Italy
- Portugal
- Germany
- Switzerland
- The netherlands

Access to the afore mentioned countries is gained through distributors, encompassing exports to avoid the costs derived from long distances. Nowadays air transport has almost been withdrawn due to its difficulties and its high costs together with the changes in timetables, loading and airport problems. The most usual way of transport is by truck both refrigerated and freezer truck.

New markets

Marketing operations are being carried out in different markets which are potential customers for the Spanish aquacultural products. It will be necessary to make big investments in spreading, advertising and marketing, however the first contacts have been positive and we hope that new marketing lines will be opened in potentially very interesting countries.

NEW TIMES. NEW PROSPECTS

The consumers' demand varies according to the country and that is why we must vary our marketing systems and the offer for our finished products.

Together with the usual presentation of the aquacultural product such as quality, continuous availability and price we must introduce new methods of product presentation and preparation.

In order to meet new demands, Spain has begun to market and present many aquacultural products according to the following **features**:

Freshness: This traditional feature is present in all species and accounts for the biggest percentage in production.

Frozen: Mussels, trouts and salmon are mostly presented in this way.

Cooked: The new different cooking techniques start to be applied to different species such as mussels, eels, trouts, gilthead bream, sea bass. The quantities are not very significant yet; but a breakthrough has been made in this presentation form.

Precooked: This wide range of possibilities has not been studied and developed enough except in some exceptional cases.

Filleted: Low cost species have already begun to supply this market. But still there is a long way to go until these products are started on a large scale into the market.

But it is easy to see that a gradual slow but continuous reduction in production costs of the finished species will in the short run favour this kind of market.

Preserved fish: Except in the case of mussels and some other small experiences, this market is still to be developed.

ACQUISITION AND OPENING OF NEW MARKETS

Presently and with a few exceptions most aquacultural products are destined for the catering markets and to high well-off classes with high purchasing power.

New markets are being created in the sector of the big supermarket chains.

It will only be possible to capture those new markets, both in already consuming markets and potential ones, through a guaranteed continuity and homogeneous quality all through the different seasons. New markets for less well-off classes are being created thus opening up possibilities for bigger sales as these marketing chains usually work with narrower margins. The potential possibilities of food chain are very varied and important.

From the above it derives that imagination and quality of the aquaculture products' original presentation must be paid attention carefully in order to meet each market or country's market according to its requirements.

MEDITERRANEAN DIET

One of the not too exploited resources of the Spanish Aquaculture producers is the right and adequate use they make of the gastronomic formula widely known as the "Mediterranean diet".

There are occasions when we have so many facts and evidencies that we are not capable to use them properly as we lack an integrated policy, and we are based on the wrong idea that our different knowledge and habits are admitted and well-known in other countries. *This is a huge appraisal mistake*, and on the one hand it shows incapability to compete in a free and aggressive market, and on the other it entails a lack of humility aiming to cast the excellences of our food habits, which are finally part of our way of living and reflect part of our history. We are in possession of all arguments to start a marketing battle which will lead us to exploit our habits, our gastronomy and our products.

The concept called the "Mediterranean diet" currently entails a way of nourishment. This concept involves a way of understanding life through the Mediterranean History in which we have all taken part, on the one part Greece, Italy, France and Spain, and on the other part, the coast countries of Northern Africa, Portugal and Turkey. If we do not use the concept known as the "Mediterranean diet", we are renouncing the biggest and best marketing way we have to increase the consumption of our aquaculture products.

We can also verify that various official organizations from all over the world find "Mediterranean diet" more worthwhile than we ourselves do. Both its health - physical and mental - properties and gastronomic aspects are widely known and reckoned by other countries more enthusiastically than we do in those countries who have created that mediterranean culture. If we are unable to take benefit of that favourable situation we are in, we shall be arrogant and vain, and we shall be the only ones responsible for our future.

We must know how to sell aquaculture products grown in the Mediterranean area not only in the Mediterranean countries, but also in other world markets. The "Mediterranean diet" card should open up new markets and habits which are currently closed to our products.

I'd not like to put an end to my contribution before I sternly warn the Public Authorities and the aquacultural sector in Greece, Italy, France and Spain, that we shall be responsible for it, if we do not start working seriously in view of this attractive and suggesting project which can be framed within the concept of "Mediterranean diet".