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Overview on aquaculture product differentiation

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SUMMARY – This paper summarizes the results of the comparative report, made in the framework of the MASMANAP Concerted Action, on new aquaculture species and products in the eight partner countries. After the comparison of the current tendencies on different European seafood markets, the major differences between Northern Countries and Southern countries appear clearly. The comparative report about seafood consumption shows that the demand for food products has considerably changed over the past ten years. The need for proteins has declined because of better eating habits, to lower energy needs through changes in production processes and to the decline of the population growth.

Key words: Aquaculture, product differentiation, species diversification.

RESUME – *"Aperçu sur la différenciation des produits de l'aquaculture". Cet article résume les résultats d'un rapport comparatif, préparé dans le cadre de l'Action Concertée MASMANAP, sur les nouvelles espèces et produits aquacoles dans les huit pays partenaires". De la comparaison des tendances actuelles sur différents marchés européens des produits de la mer ressort clairement la différence principale entre les pays nordiques et les pays méridionaux. Le rapport comparatif sur la consommation de produits de la mer montre que la demande de ces produits alimentaires a considérablement changé au cours des dix dernières années. Les besoins en protéines ont diminué dû à une meilleure alimentation, à des besoins énergétiques plus faibles au travers des changements des processus de production et à la diminution de la croissance démographique.*

Mots-clés : *Aquaculture, différenciation de produits, diversification des espèces.*

From the comparison of the current tendencies on different European seafood markets, it's clear the major difference between Northern Countries (Norway, Germany and UK) and Southern ones (France, Italy, Spain and Greece). The main differences are represented by the habits of consumers in order to add value that they require to seafood products. The habits represent the base of different strategies of each Country referring to species diversification and product differentiation.

Diversification means the introduction of new species, not in absolute terms, but in relative terms: what is necessary is the transposition of knowledge between European countries, to develop culture of the species that are not present in all countries yet, for example: to introduce in Italy the culture of red tuna that is not present at moment in Italy, while in Spain it is at commercial stage. Differentiation means the introduction of products that have added value in terms of new packaging, new processing (pre-cooked, delicatessen, marinated), private label, regional branding, certification of quality (ISO 9002), IGP or DOP (EC Rule 2081/1991).

The comparative report about seafood consumption shows that the demand for food products has considerably changed over the past ten years. Needs for proteins has declined thanks to better eating, to lower energetic needs through changes in production processes and to the decline of the population growth.

Several socio-economic factors, including urbanisation, women going out to work and changes in family structures, have contributed to major modification in the demand for food products. The concentration of people in cities, as it increases the time spent on transport between home and working places, has drastically modified their time utilisation schedule. The greater involvement of housewives in professional activities has had major effects to improve households income, and to reduce the time available for traditional home tasks including cooking. This factor has boosted the demand for restaurant service, including institutional restaurant; moreover, this phenomenon developed a time saving attitude, which was favourable to products easy and fast to prepare and

cook. It also generated a demand for equipment, also designed to save time, e.g. freezer and micro-wave ovens.

Modern life, through new constraints, new ideology and new wishes has modified the family structure, with a growing number of smaller households; this increased the demand for smaller food portions, including individual (for one and/or two persons) one.

In the market for fish, in particular, the demand for seafood has constantly increased over the past ten years. This growth can be attributed to improvements in living standards and the positive image of fish perceived by modern consumers. If we combine, on the seafood segment, the socio-economic factors, new family structure and good perception of seafood products, the clear effect is the increasing in demand for fillets, steaks, fried mixed fish, small sized fish at the expenses of whole larger fish. Another effect concerned with is where the demand of aquaculture products is localized; the matter is that the inhabitants in their town have distribution channels as hyper and supermarkets that represent the most important distribution channel for aquaculture seafood. In Greece, for example, according to market studies, nine consumers over ten are aware of the cultured fish and eight out of ten have consumed such products, with preference to sea-bass and sea-bream which quite highly regarded.

It seems from the results that inhabitants of great urban areas are systematic consumers of aquaculture fish; the same happens in Italy, where the national socio-economic study on employment and the level of dependence on fishing shows that the poor performance of the wholesale auction markets, and excessive fragmentation of the distribution channels, represent the main weakness in the distribution of fishery products in this country.

The cross-country comparison shows one fundamental difference between Northern MASMANAP's participants and Southern ones: for Mediterranean partners the percentage of seafood fresh and frozen is very important (Table 1).

Table 1. Share of household consumption by type of seafood for MASMANAP countries

Country	Fresh	Frozen	Processed [†]	Crustacean Molluscs ^{††}
Greece	75	17	8	–
Italy	54	23	23	–
France	52.7	23.7	25.6	–
Spain	49	12	14	25
Norway	49	25	26	–
UK	30	49	21	–
Germany	14	21	51	14

[†]Marinated, salted, canned, etc.

^{††}Where not included as fresh or frozen fish.

On the contrary, in Northern partners the demand for frozen and processed seafood is very significant. The processed seafood products are consumed by specific consumers in a particular context and where the demand of seafood goods is only based on tradition. In Mediterranean countries the demand of seafood is increased in particular for frozen, though the major part of consumption is represented by fresh ones.