Technical guide-book Cogépêche

Consumption of fresh sea products

Normapêche bretagne

AGRO CAMPUS OUEST

This “**Consumption of fresh sea products”** booklet provides various keys that are necessary to understand the sea product market and the fresh sea product market in particular. The statistical data, theoretical elements and results of surveys presented here are designed to complement the empirical knowledge gathered by professionals. Daily contact with customers is in fact one of the most valuable sources of knowledge about consumers. The aim of this booklet is to provide a broader perspective of French consumers, their behaviours and their aspirations so as to improve this knowledge and help better meet their demands.

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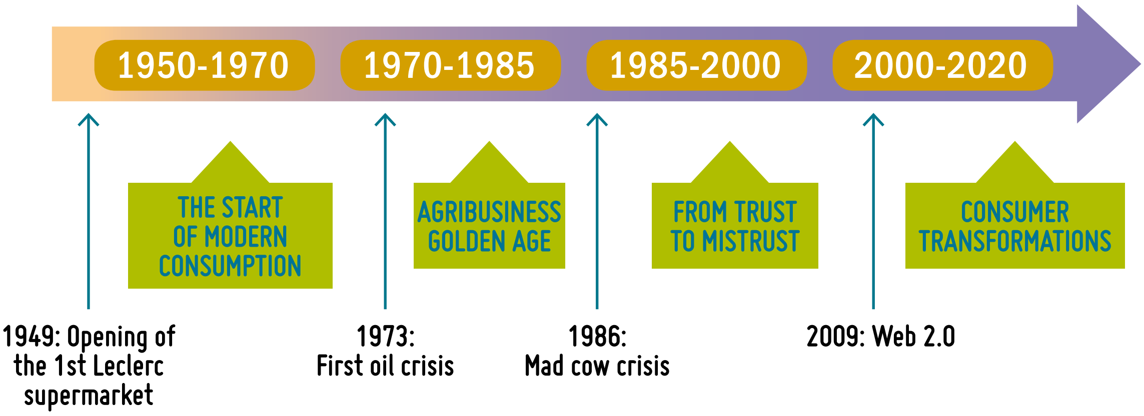
Changes in food consumption

Consumers, consumption patterns, products and advertising have changed over time reflecting the transformations in society (French Ministry of Social Affairs and Health, 2000). The "consumer society" as we know it today is the result of over 50 years of mass-consumption, industrial progress and social upheavals. Prior to 1950, this "consumer society" and "mass consumption" as we understand them today did not exist. The modern consumption age really started after the Second World War and can be divided into four main periods, each marked by events in society that modified consumption patterns to produce our current consumption model.



History of modern consumption *(Source: Fasquel et al., 2014)*

1950–1970: THE START OF MODERN CONSUMPTION

The end of the Second World War marked the beginning of the reconstruction period in France. The situation evolved rapidly from a context of general scarcity to one of sufficiency and then affluence thanks to the development of new industries and technical progress (Ministère des affaires sociales et de la santé, 2000). New, automated production methods gradually saturated the markets and supply outpaced demand. This triggered the need for competitive differentiation amongst industrialists and with it marketing. This change in the structure of the economy led to the opening of the first mass-market store in 1949 and an intensification of advertising. The first hypermarket opened in the early 1960s (Carrefour in Sainte-Geneviève-des-Bois). At the same time, more and more French households acquired television sets, thus facilitating the rapid development of advertising.

The economy was not the only sector affected by post-war changes. The higher number of working women had a strong impact on the structure of French households, with families benefiting from two sources of income to the detriment, among other things, of the amount of time spent preparing meals. A direct result of the increase in household financial resources was an increase in purchasing power with French households buying new, more modern goods. In 1970, 80% of French households had a refrigerator and 70% a television set (Anonymous, 2014). Thanks to technical advancements, industrialists were able to process large quantities of agricultural produce. Processed products were able to replace the housewife, now a working woman, and made up for the drop in the average time spent in the kitchen. Processed food and the convenience provided by the industrialists gradually altered French consumption patterns.

Post-war France was characterised by significant economic, industrial and social development accompanied by a correlative transformation in the model of households and changes in supply, both quantitatively and qualitatively. The changes set in motion between 1950 and 1970 laid the foundations of today's society and most of the changes observed in the following decades were the direct consequence of these post-war transformations.

1970–1985: THE GOLDEN AGE OF AGRIBUSINESS

The 1970-1985 period is often referred to as the golden age of agribusiness. The economic growth of the post-war "Glorious Thirty" years maintained the increase in the households' purchasing power with an array of modern white goods becoming the norm. The freezer, a new appliance introduced in the 1970s, opened up new perspectives for food conservation, already dramatically improved with the introduction of the refrigerator a few years before. The dish-washer also appeared at this time but compared with their predecessors, these two appliances experienced a slower penetration rate. This improvement in households' equipment contributed to their modernisation, but also led to a further reduction in the time spent preparing meals.

The healthy economic context led to an increase in external trade. Imported goods become more frequent on market stalls and on supermarket shelves. Reserved for an elite not so long ago, fruits like bananas, kiwis, pomelos and avocados became part of the usual diet of French households (Rungis éducation, 2010). The French consumer's basket became more diversified mainly consisting of processed and imported foodstuffs. The range of available fruits and vegetables increased with the introduction of produce from Southern hemisphere countries. This globalisation of the food market also provided a way to overcome seasonality with new sources of supply being introduced in the market together with new products. It is at that time that consumers started to lose track of production constraints and the notion of seasons, due to a reduction in the supply of fresh products and increased standardisation (INSEE, 2002).

1985–2000: FROM TRUST TO MISTRUST

After three decades of prosperity in the agribusiness, the 1980s marked a turning point in the "consumer-industry" relationship. Advances until then viewed as positive suffered a setback in the opinion of consumers. The main cause for this sudden reversal is to be found in the succession of major food crises that affected the whole of Europe, starting with the mad cow disease outbreak in the UK in 1986. France was then in turn affected by BSE (Bovine Spongiform Encephalopathy) in 1996 and then by the dioxin scandal, etc. Largely commented in the media, these crises resulted in a severe loss of confidence and consumers started to question the bases of the agribusiness. Disillusioned French consumers demanded guarantees of quality for the products offered for sale, to which the French government responded positively by enacting the Food Safety Act in 1998.

Paradoxically, the impact of these crises on consumption proved relatively limited in the long term. Habits die hard and consumers no longer seem able to do without processed food (Bartnik, 2013).

The 1980 and 1990 food crises did not involve sea products, which partly explains the positive image they still have today. A substitution effect took place, with consumers replacing meat by seafood.

Food crises also contributed to reinforcing an already well-established trend, that of health and food. Consumers became fully aware of the impact of diet on health, whether beneficial or not. The first "healthy food" products were introduced in the 1980s.

These "healthy food" products continued to develop in the 1990s and 2000s, evolving into "light" products. Then organic, "more natural" products became the new craze. Although these trends are clearly distinct, they all originate in consumers' desire to preserve, and even improve their health capital via the food they consume. In response, industrialists either emphasise the scientific aspects of functional food – food producing health benefits - or stress the traditional dimension (naturalness, local origin, etc.).

2000–2020: CONSUMER TRANSFORMATIONS

Although the changes seen in the 1950s laid the foundations of what was to become today's society, the 2000s acted as a catalyst. Volatility and rapidity are indeed today's watch words. The share of the budget dedicated to food, which had been stagnating since the early 1990s, started to drop in 2001 to reach a critical 12.5% in 2009 (INSEE, 2009). Other socio-economic changes also came into play. The higher number of divorces, for example - a trend which started in the 1980s - deeply modified the structure of families and therefore meals, with a direct impact on consumers' purchases.

Another note-worthy point was the establishment of the **PNNS** (Plan National Nutrition Santé - French National Nutritional Health Programme) in 2001 highlighting the importance of nutrition. Consumers became aware that food does not simply have to be "not harmful", but that it can also be really beneficial. The concept of nutrition is gradually replacing the too hazy concept of health.

Internet and the circulation of information are a real revolution. First thought-up in the 1960s, the Internet developed in the 1990s, initially in the home, and then on mobile devices in the 2000s. With the development of smart phones, consumers now have permanent access to multiple sources of information and to rapidly and constantly evolving digital technologies.

These factors are not the only ones, but they contribute to significantly changing consumers' lifestyles as well as their eating and purchasing habits. Technology-enabled consumers are more volatile and can access information rapidly at any time. They trust the opinions of their peers and of authority figures which are no longer always brands. Private labels (PL) are a good example of this. Their market share for origin-linked, organic and exotic product categories is steadily increasing and their overall market share is estimated at 35% in 2015, against 20% in 2000.

PLAN NATIONAL NUTRITION SANTÉ (PNNS):
the French National Nutritional Health Programme has a general objective to improve the state of health of the whole population by acting on one of its major determining factors, namely, nutrition. The PNNS is a nation-wide pilot programme. Its aim is to provide reliable and scientifically-validated recommendations to help the population and health professionals understand the sometimes contradictory information about nutrition they are exposed to on a daily basis (Anonymous, 2014).

SNACKING: *Snacking is consumption based on individual and portable portions that can be eaten anywhere, anytime. Our increasingly hectic lives make skipping a meal or grabbing a bite to eat not as unusual as it used to be and certainly not the prerogative of a minority. Our new lifestyles and working habits make it sometimes necessary to skip a meal or have a sandwich in the afternoon (Anonymous, 2014).*

Consumers' expectations have also changed with their lifestyles. Although convenience has always been very important to them, it is now a prerequisite. This need for rapidity and convenience originates from the breakdown of traditional meals and the development of **snacking**. The family unit has changed, leading to a change in how and where meals are taken.

New genuine ecological awareness and criticism of the modern consumption model by consumers are also dimensions that have to be factored in.

TODAY'S CONSUMER

> Reduced food budget
> Price is a critical selection criterion

> Food, a source of health benefits

> Emergence of environmental awareness
> Questioning of the consumption model

> Breakdown of meals, development of snacking
> Need for more convenient products

> Immediate and permanent access to a wealth of information

Profile of today's consumers *(Source: Fasquel et al., 2014)*

French consumers and sea products

With 310,000 tonnes of fresh products and a fleet of over 4,500 vessels, the French fishing industry is ranked 3rd in Europe, behind Denmark and Spain, and recorded a turnover of 830 million euros in 2013. Fresh fisheries remain the most profitable activity, ahead of shellfish farming, fish farming and frozen fisheries. Despite the apparently healthy situation of the fresh fisheries sector, downstream activities and the consumption of fresh sea products do not benefit from this context. In addition to a negative trade balance, it is the nature of the products consumed that draws the attention. France is characterised by its great variety of species and the expertise of its professionals. But recent years have seen an erosion of the market share of fresh products to the benefit of other product categories, mostly seafood delicatessens and cured products (France AgriMer, 2013).

KEY DATA ABOUT FRENCH CONSUMPTION

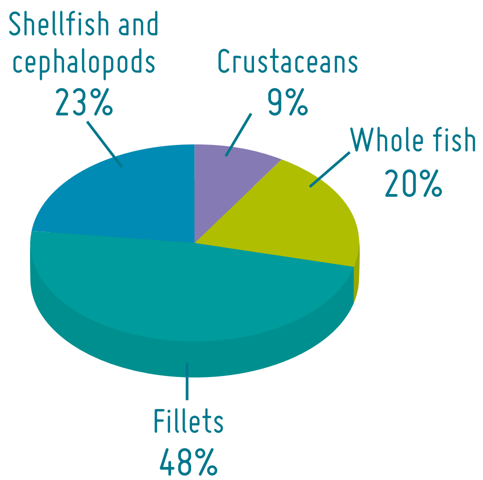
Some key figures are necessary to understand the dynamics of the consumption of fresh sea products in France. In 2012 the consumption of aquatic products (fresh or otherwise, all origins and production methods combined) amounted to 36 kg per capita and per year (France AgriMer, 2013). This figure, which until recently increased year on year, has in recent years tended to level out. This is, however, a relative decline compared with the consumption of meat products which has been consistently decreasing since the 1990s.

A breakdown of consumption shows that purchases are highly concentrated on a limited number of species, mainly salmon, cod and prawns. Tuna accounts for 48% of canned products in volume (France AgriMer, 2013). These species are mainly imported or bred in farms. Considering the variety and potential of Breton fresh products, their weight on the French market is not optimal.

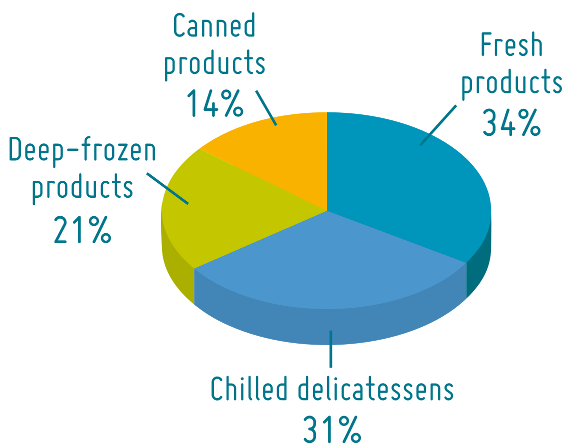
Comparing the various sea product categories shows the gradual decline of fresh sea products in household purchases to the benefit of other product categories. Less and less satisfied with today's product packaging and presentation, consumers are continuing to buy sea products but in other forms (canned, deep-frozen, delicatessens, etc.)

Half of the fresh product consumption is of filleted fish, a simple product that requires no or little preparation. This is consistent with the success of delicatessen products, whose main strength is their convenience.

The consumption of sea products is currently changing and in a state of flux. The shift from fresh to other product categories highlights the need to adapt supplies on the stalls, especially as this traditional counter is appreciated by French consumers.



Distribution of fresh sea product purchases
(Source: France AgriMer / Kantar worldpanel, 2013)



Market share distribution for each category of sea products
(Source: France AgriMer / Kantar worldpanel, 2013)

PERCENTAGE OF PURCHASING HOUSEHOLDS IN 2012[1]

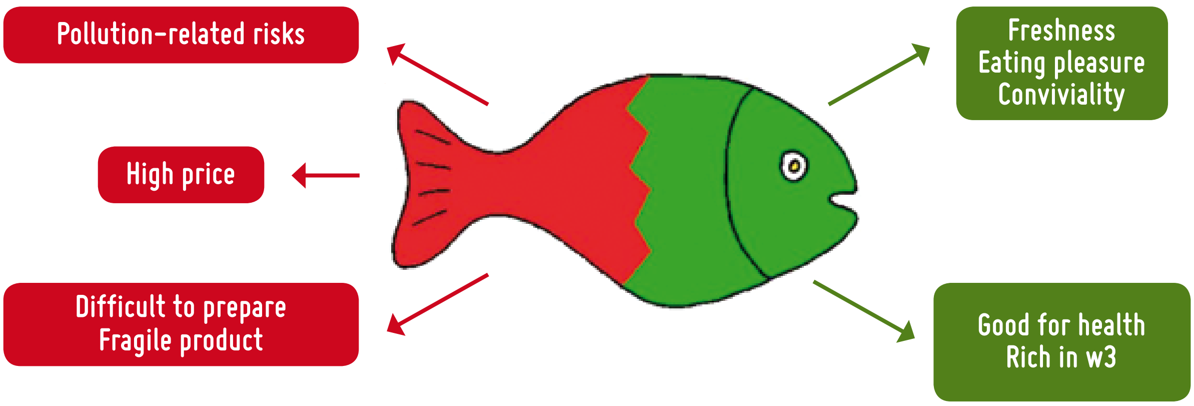
(1) purchasing household purschase once a time at least - (2) with barre code

Percentage of purchasing households in 2012
(Source: France AgriMer / Kantar worldpanel, 2013)

PERCEPTION OF FRESH SEA PRODUCTS

Despite the current relative but noticeable drop in purchases, fresh sea products enjoy an overall positive image among French consumers. The Cogépêche programme provided an opportunity to study their perception of fresh products.

Generally, consumers have a positive image of fresh sea products. For most of them, they evoke freshness, pleasure, taste, festive meals and conviviality. Then come a number of benefits associated with eating fish: firstly nutritional, dietetic and health benefits and secondly: taste, eating quality and pleasure as always. Sea products are associated with summer holidays and the need to get away in consumers' minds. They also evoke tradition, nature, small-scale fishing and respect for the environment. French consumers are increasingly sensitive to ecological and ethical issues.



Perception of sea products by consumers
(Source: Mesnildrey et al., 2009)

Despite all these positive images, consumers also associate fresh sea products with a number of negative aspects. All the surveys show that consumers consider these products to be too expensive. When asked about price, they always rate it as too high or even unaffordable. Regular consumption of sea products is even sometimes viewed as a luxury.

Another obstacle is the preparation of fresh sea products, which is viewed as too complicated, too long and unpleasant, especially because of smells. This negative aspect of fresh fish, combined with its fragility, only reinforces consumers' fears of ruining their meals.

Consumers are also increasingly wary of fresh sea products and seem preoccupied by their origin. They claim to have less and less faith in the origin and freshness of the products, mostly because of the sea pollution incidents that always generate significant media attention. "Mercury, heavy metals, plastics and environmental destruction" appear to be their major sources of concern.

Knowing the consumer

The work initiated by Cogépêche highlighted the need to reposition fresh sea products. French landings must be made more attractive to target consumers and highlighting the intrinsic and extrinsic qualities of fresh sea products would contribute to improving product positioning in the minds of consumers who are increasingly demanding and volatile. Improved knowledge of specific consumers - the target in marketing – is therefore essential in a product positioning process, and even more so in the case of repositioning.

TARGET: *Fraction of the population meeting certain criteria, […] "core target" designating the sub-set of this fraction of the population the company intends to aim its message at as a priority (Lehu, 2012).*

POSITIONING / REPOSITIONING: *giving a product and its image a specific position in the consumer's mind (according to Ries and Trout, 1972).*

CONSUMERS' EXPECTATIONS

Given the decline in sales and the increasing mismatch between fresh sea products and new consumption patterns, improved knowledge of consumers' expectations would help adapt the products to the demand. The studies carried out as part of the Cogépêche programme have identified what consumers expect from sea products. These expectations fall into five categories: **pleasure, safety, ethics, convenience** and **health-nutrition.**

Pleasure

Consumers want to feel satisfaction and experience pleasure with their food. This dimension covers purchasing (shopping experience), cooking (rewarding aspect of cooking, provided preparing the dish does not involve too many constraints and does not take too much time) and tasting (daily gastronomic, culinary experience).

Safety

The sector must preserve and reinforce consumers' confidence. Clear information that can be compared is essential to clarify supply. In addition to reliable information, consumers also need guarantees about the product, and especially about the origin of the product they buy. Product origin is even more important in the case of sea products, as some production areas are clearly identified with specific species. Another reason concerns ethical considerations and the media profile of particular fisheries, of producing countries and their practices.

Ethics

Social and environmental awareness is gaining momentum among consumers who are increasingly attentive to what they buy. This type of expectation should not be overlooked. Generally, there is a risk of tarnishing the image of the brand, product or company or, here, the image of sea products as a whole.

Convenience

Convenience is essential. This expectation is now hardly ever expressed as the convenience aspect of a product is taken for granted. All products have to be user-friendly. Highlighting the convenience of a product is still however a selling point and even gives a competitive edge if the greater convenience of the product can be demonstrated.

Health / nutrition

The link between health and food is deeply rooted in consumers' minds. The benefits of sea products on health are well known and such awareness should be used. We are also seeing a return towards natural products. Fresh sea products are a part of this trend and should benefit from it.

Today's consumers want to enjoy healthier, less processed products, but have to do so with an increasingly tighter budget. They also want convenience food, which is difficult to provide without processing the product. Likewise, responsible consumption often means higher prices. Consumers are therefore torn between all these expectations, which are virtually impossible to satisfy with one single product.

PLEASURE	*> Daily gastronomic experience* *> Pleasure of cooking, with no constraints*
SAFETY	*> Need for clear, comparable information* *> Need for guarantees* *> Need for traceability*
ETHICS	*> Includes the concept of responsible consumption when shopping* *> Social and environmental concerns*
CONVENIENCE	*> User-friendly products* *> Products suitable for snacking*
NUTRITION HEALTH	*> More natural, less processed products* *> Health benefits*

Consumers' expectations about fresh sea products
(Source: Mesnildrey et al., 2009)

PURCHASING CRITERIA FOR FRESH SEA PRODUCTS

The purchasing criteria given by the consumers interviewed as part of the various studies carried out under the Cogépêche programme mainly confirm each other's findings. Although their order of importance may vary, it is possible to identify essential criteria all consumers pay attention to when buying fresh sea products.

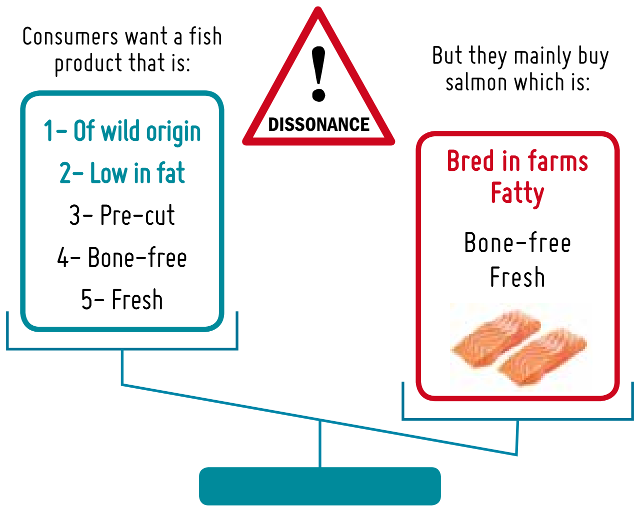
The key criteria for consumers are firstly the appearance and freshness and secondly price and promotions. The nutritional benefits of fresh fish and other sea products have drawn an increasing number of French consumers to supermarket fish counters and fishmonger and fish market stalls. But it is essentially the freshness, appearance, species and price criteria that really matter to them. This ranking is different from the finding made by sales professionals. They claim that it is firstly price that is most important to shoppers and then freshness. This inconsistency is probably due to the fact that consumers are reluctant to admit that price is their main purchasing criterion.

PURCHASING INTENTIONS AND ACTUAL PURCHASES

Trade-off analysis is a statistical tool that makes it possible to mitigate the declarative aspect of interviewees' responses by asking them to choose between different products, thus highlighting the compromises they are ready to make.

The aim of such an analysis is to obtain an "ideal fresh sea product". It appears that French consumers are looking for a wild, fresh, pre-cut and bone-free product with a low fat content. But according to the FranceAgriMer consumption reports, the most heavily consumed fish species in France is salmon, a fatty fish most often bred in farms.

There is a clear dissonance or inconsistency between what consumers claim they want to buy and what they actually buy. This disconcerting observation gives pointers to understanding consumers' purchasing behaviours. It is an invitation to take a closer look at their habits, behaviours and motives. It also suggests that even if presented with an ideal product that meets all of their expectations and values, consumers may not be willing to buy it. How can this inconsistency be explained? What are their real consumption patterns and what do they expect from sea products in the future?



Discrepancy between the ideal fish product and what consumers actually buy
(Source: Mesnildrey et al., 2009)

CONSUMER BEHAVIOUR

The 1970-1985 period was described above as a period when consumers started to disconnect themselves from production as a result of the development of the food processing industry. The standardisation of both agricultural and fish products as a result of the industrialisation process partly explains their lack of knowledge when it comes to products and production methods. Consumer profiles and the consumption of sea products have changed over time. Several factors therefore explain the shift from fresh products to more processed food. The consequence of this gradual disconnection is now obvious and little by little consumers are starting to become once again conscious of the idea of seasons for fruit and vegetables with a desire to adapt their consumption to more natural production cycles.

As regards sea products, ignorance is even greater and consumers are often unaware that these products have their own seasonality. This lack of knowledge explains most of the consumption barriers we observe today. Ignorance or poor knowledge of the constraints inherent in sea products creates misunderstanding between the consumer and the product. To this must be added changes in lifestyles and consumption patterns, as they too have an impact on purchasing behaviours.

Several factors explain the changes in consumption patterns and new behaviours. The share of the budget dedicated to food is declining, thus making price a dominant selection criterion. At the same time, the demand for healthy, beneficial food has never been so high. Increased environmental awareness also plays a role by sometimes encouraging consumers to question our current consumption model. Consumers, however, are increasingly seeking solutions. Snacking and the breakdown of meals encourage them to find these solutions in more industrialised products, freeing them from cooking and the drudgery associated with preparing fresh, raw products. This combination of factors explains more volatile consumer behaviours and more opportunistic, price-motivated purchases. Consumers, however, are not the only ones responsible, as the way products are displayed in store does not always emphasise the diversity of sea products. Neither is the seasonality of fresh products used sufficiently as an asset. This is even truer in Brittany where local production is highly diverse.

Another point is that thanks to the development of communications systems, consumers have never been so well-informed. Access to mobile Internet offers a multitude of information and sources used by consumers to guide their choices before, during and after shopping. This aspect of consumers' decision-making is given very little attention and special offers are the most commonly used method to guide consumers' purchases. Reducing the price to make a product more attractive is not the best way of promoting local or seasonal species. This leverage has been used for many years. It generates traffic in the stores and guarantees a sales threshold but fails to build real loyalty among consumers.

SEA PRODUCT CONSUMPTION PATTERNS

Consumers display the same behaviour at the fish stall as in any other supermarket aisle. As the abundant and often diverse choice does not help them make up their minds, they tend to stick to the species they know and which reassure them. A number of factors explain this behaviour that is typically observed for sea products, and even more so for fresh ones.

Firstly, consumers see that products on offer vary in the course of the year but are unaware of their seasonality. Prices also tend to fluctuate according to seasons and production periods. The perception of sea product prices is therefore biased as consumers tend to remember only high price peaks. Faced with highly seasonal products that lack visibility and with price variations they cannot understand, consumers prefer to buy products they know.

This has a strong impact on Brittany's production. Despite the fact that a number of high volume species are present all year round, a significant part of the production is composed of a panel of various species. Catches are regulated within limited availability periods, thus making their presence on the stall and their prices extremely volatile, a situation not immediately understood by consumers.

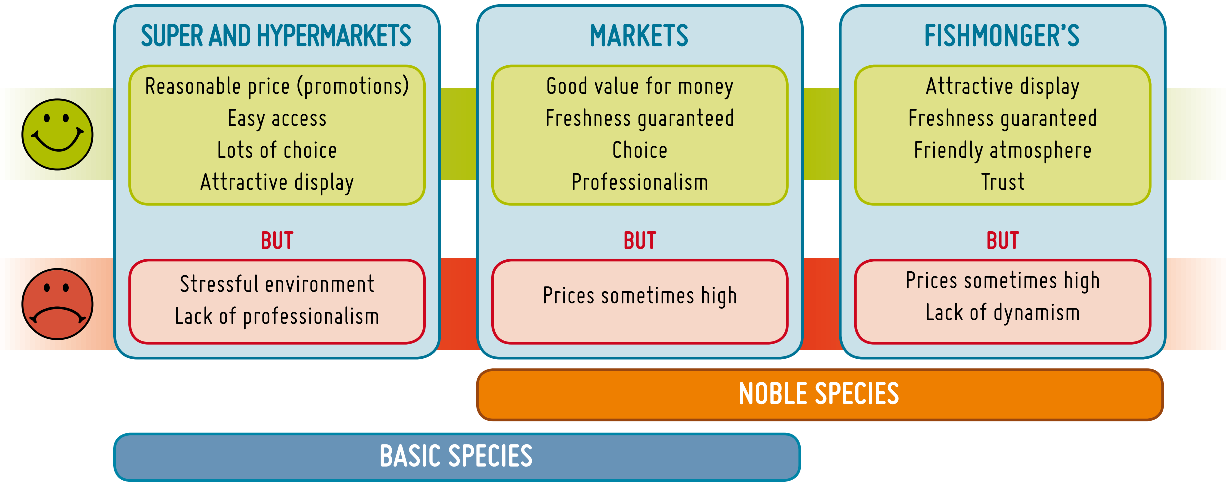
Conversely, farmed species or species with a low seasonality are present all year round at a relatively constant price, making salmon, cod and prawns stall references. This regularity explains that these species make up most sales. It is not only the production sector that is affected. Consumers increasingly view sea product purchasing and consumption as complex operations. Since they do not fully understand all the selection criteria, consumers prefer to buy the same "reference species" mentioned above. And the fact that product information is not always comparable or consistent does not help consumers in their selection process.

The specific selling conditions applicable to fresh sea products can also be a source of inconvenience. The presence of ice on the stall often generates puddles and increases atmospheric moisture nearby. This may dissuade consumers from coming up to the counter and encourage them to opt for the self-service shelves instead.

Finally, although consumers know how to vary meat products and cuts, they are at a loss when it comes to varying their fish consumption. This explains the low level of loyalty amongst consumers who are more sensitive to price, an easier-to-understand variable whatever the product concerned. The same applies to ways of cooking sea products, purchasing habits being strongly correlated with cooking techniques. Consumers in general tend to apprehend cooking fish, which does not encourage them to buy a product they will not know how to prepare when they get home.

FRESH SEA PRODUCT RETAIL OUTLETS

Consumer behaviours and, above all, expectations vary according to the type of retail outlet. Although all of them offer sea products, significant differences can be observed between a traditional sedentary or itinerant fishmonger's and a supermarket fish counter in terms of quantity, quality and variety. Consumers also tend to choose between different venues depending on the type of products they look for and the constraints they set themselves.
A classification of venue perception has been established based on the reasons given by consumers for shopping at such and such retail outlet.



Consumers' perception of retail outlets selling fresh sea products
(Source: Mesnildrey et al., 2009)

Supermarkets and hypermarkets account for 70% of sea product purchases (France AgriMer, 2013). They are the preferred outlet because they offer the best prices, especially through promotions. Another important point that consumers appreciate is that they can buy many different products at the same place. Lack of professionalism and advice from the staff and an often quite stressful environment, however, are to be noted on the negative side.

Markets (traditional itinerant fishmonger's) are frequented by a more limited number of better informed consumers and concentrate 15% of sea product sales. These consumers look for quality at a reasonable price and are driven by product freshness and choice. They also know that they will be able to benefit from professional advice. Although quality, freshness and professionalism are undeniable, prices tend to be higher than in super and hypermarkets.

Fishmongers (traditional sedentary fishmonger's) have extremely loyal customers who look for professional advice and freshness. They also appreciate the friendly atmosphere and the relationship of trust with the staff. Although stalls are generally more attractive that super and hypermarket fish counters or fish market stalls, this type of outlet often lacks dynamism and sells at higher prices. Traditional fishmongers generate 10% of fresh sea product sales.

In addition to differences in venue, level of advice and affordability, retail outlets also differ in terms of product range. Consumers looking for basic species will tend to go to super and hypermarkets whereas sedentary fishmongers attract customers looking for more noble species. Markets offer a mixed range of products, consumers expecting both noble and more basic species to be found on the same stall.

How to reduce the gap between fresh sea products and consumers?

Processed sea products are becoming increasingly popular among French consumers, a success which is worth investigating. Lessons can indeed be learned from this success and could be used as a source of inspiration to develop and modernise fresh sea products. But the question is how to adapt these new concepts to fresh sea products without compromising their intrinsic qualities. Tradition, expertise and naturalness are also features that appeal to consumers' emotions. Preserving the intrinsic qualities of fresh sea products whilst providing services that meet special consumption moments appear to be the way forward.

LESSONS TO BE LEARNED FROM INDUSTRY AS REGARDS INNOVATION

Industrialised products are by nature quite different from fresh sea products but the same levers apply to consumers' expectations. Industrialised product intelligence can therefore prove useful, including for identifying innovation trends. Although innovations may be complex to adapt to fresh products, they are based on **insights** and **concepts** that can help improve the fresh segment.

In 2012, four main innovation trends were identified in new products launched on the sea product marketplace: "Fish is not just on Friday", "Eating is a social act", "New processes that respect the product" and "Exceptionally daily". There was also a 5th, cross-cutting trend: "Versatile, multifunctional products".

Fish is not just on Friday

Sea product consumption, fresh or otherwise, is sometimes limited by culinary habits, traditionally just on Friday, or just for lunch... Eating fish outside these routine times means providing a different experience to the consumer. Some industrialists use the attributes of sea products (freshness, health, etc.) to shake up target market codes and consumers' preconceived ideas. By doing so, companies try to make sea product consumption more accessible to a wider range of consumers. Finding ways to overcome the barriers limiting sea product consumption, shaking up market codes, improving convenience or playing with the important emotion surrounding sea products are some examples of the solutions contemplated by industrialists in 2012.

Eating, a social act

Faced with changing eating behaviours, some processing companies took the opposite view of snacking and out-of-home consumption and promoted meals as moments of conviviality, making their products the channel for social interaction and shared moments. Such conviviality can be induced in many ways. Examples of shared moments include a now well-established consumption moment, the cocktail dinner. Combining a classic dinner with modern eating preoccupations, this new type of meal associates the conviviality of the food ritual with rapidity, convenience and choice, all aspects that matter to today's consumers. The wide variety of products, uses and images recreate an interaction, a shared moment, between consumers. Interesting concepts also lead one to think that "being in fashion" in the future will also include food. This is certainly something to be factored in when working on the positioning of future products.

Modernity, design, the use of "gadgetry" and the "fashionable" aspect of a product are avenues to explore. Products are natural subjects of discussion between consumers. Buyers immediately want to tell others about the product they have just bought, as acknowledgement of the originality of a purchase is part of what makes it so rewarding.

INSIGHT: *An insight (or consumer insight) is the identification by the consumer of an unsolved problem or dilemma affecting the product category in which the brand operates. These viewpoints provide approaches for developing new products and/or designing an advertising strategy (Lendrevie et al., 2008)*

CONCEPTS: *Original ideas that are used to build a structured approach to creating a product, a service or a communication campaign. Concepts lead to semi-finalised versions (sketches, projects or prototypes in the case of a product) that will then experience a number of successive improvements throughout the development process.*

How to reduce the gap between fresh sea products and consumers?

New processes that respect the product

Some innovations do not concern one specific product but several of them. In this case, the novelty lies in the use of new industrial processes. Technological novelty may also concentrate on one single product. In both cases, industrialists clearly aim to provide consumers with increasingly higher quality and more convenient goods. Used at different levels, these new processes can have a direct or indirect impact on the consumer (by improving the initial quality of sea products during their processing, conservation or consumption). Turning these technological advances into selling points can prove a successful strategy.

Exceptionally daily

Households are currently in a hugely paradoxical situation: cooking shows are undeniably a success but the consumption of snacks and other products responsible for the breakdown of traditional meals is rocketing. This leads us to the conclusion that modern French consumers are willing to eat well but do not want to “waste” their time cooking. Why not just say they “do not want to cook”? Because the French culture of gastronomy is still vivid, and in people’s minds, “home-made” products will always be better than processed food.

Several options are possible to solve this paradox of daily cooking. The first one is to change the image and quality of processed food by guaranteeing optimal organoleptic quality for a minimum amount of time spent in the kitchen (heating, cooking...). Another option consists of walking the consumer through one or several dish creation or preparation steps, with the food industry taking charge of all the most daunting or technical tasks. This is what component cooking is all about, with the role of the consumer being limited to combining already prepared ingredients. These products give the consumer the impression that he did it all by himself whilst limiting actual cooking time to no more than 30 minutes. This daily culinary experience can also be achieved by integrating a touch of gastronomy in day-to-day meals with solutions that can rapidly transform a commonplace dish into something more exotic or original.

Part of the innovative products launched in recent years aim to meet, in principle, two antagonistic expectations of French consumers: culinary experience and rapidity. By improving the quality of processed goods or helping with the cooking process, industrialists are providing consumers with tools that rapidly and significantly improve the quality of their daily meals while still using sea products.

Versatile, multifunctional products

Quite a significant number of products are designed to have several uses depending on the function or situation. Depending on how we use them, some innovations will serve different purposes in the kitchen, thus creating ways of introducing flavours, to be used alone or as ingredients in more complex dishes. Such versatility is an asset in modern cooking, “two in one” solutions providing consumers with the possibility to choose what they want to do with the product. This often means they can be used in dishes with variable preparation times, at different consumption occasions or even by different targets.

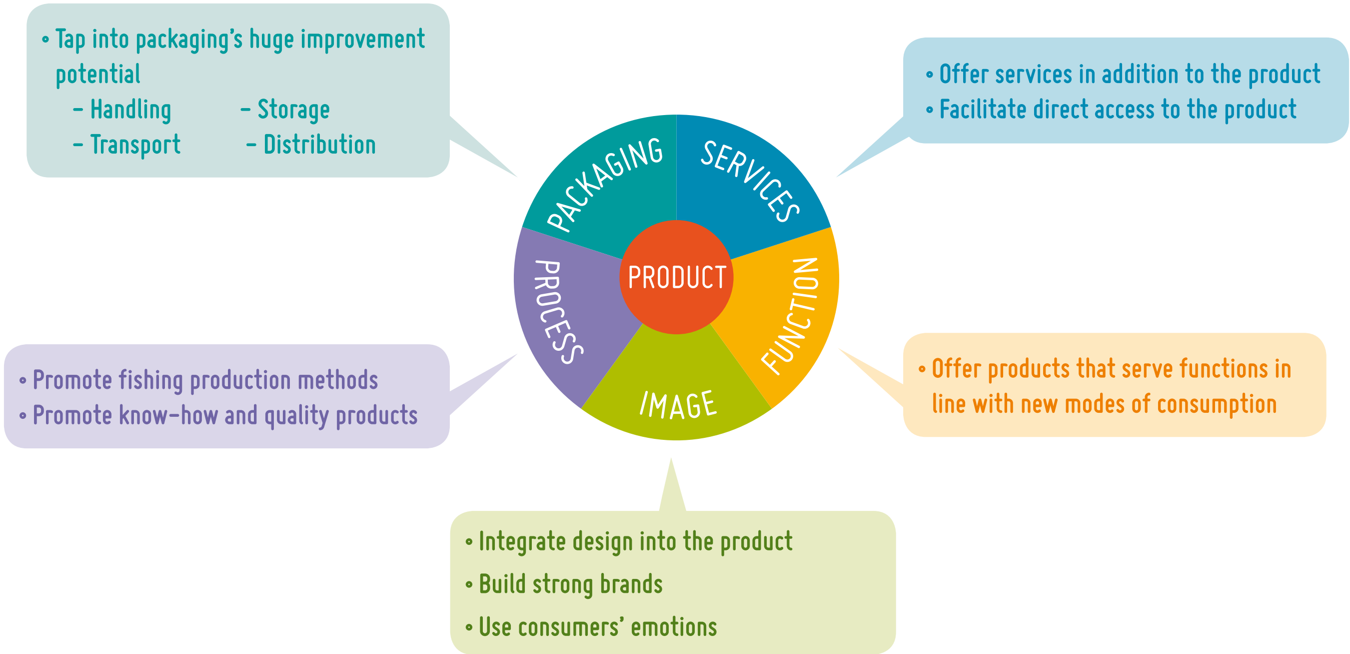
WHAT FRESH SEA PRODUCTS FOR TOMORROW?

The main challenge for Brittany’s fishing sector is to meet consumers’ expectations by providing them with relevant solutions without falling into the obvious trap of industrial processing. Considering that fresh sea product enhancement must result in minimal modifications to the **intrinsic** qualities of the product, the only way forward is to improve its **extrinsic** qualities. The industrial sector adapts to sea product consumption by modifying the intrinsic (and extrinsic) qualities of raw materials through processing. Taking the option of modifying fresh sea products to a minimum means developing solutions that **facilitate access to the product** and walk consumers through purchasing, cooking and fresh product consumption in general.

INTRINSIC / EXTRINSIC: *Intrinsic features refer to the product’s inherent qualities, i.e. what the consumer is going to eat. Extrinsic features include all that is external to the product. The recipe and the omega 3 content are examples of intrinsic features. Conversely, packaging, services, brand image etc. are extrinsic features.*

Services, packaging, product function, the manufacturing (or processing) method and image are the five main categories of extrinsic features. This list is not a finite one but it shows the scope for improvement that it is possible to achieve by just adjusting these external variables. Innovation can help improve fresh sea products by modifying these criteria without touching the product itself.

"Facilitating access to the product rather than transforming it"



Fresh sea product extrinsic qualities and possible development areas
(Source: Fasquel et al., 2014)

Packaging

Given the identified barriers to consumption, packaging is a good driver for improving and promoting fresh sea product sales. There is indeed room for improvement in how products are sold on stalls. Packaging is also a major component of any product and serves a number of vital and diverse functions throughout a product's shelf life, especially if it is fresh.
Packaging functions fall into three main categories: product protection, transport and consumer information. There are also complementary functions such as product promotion, easy use, anti-theft, etc. Environmental-friendliness is also increasingly regarded as a prerequisite of modern packaging design.

Information / promotion: Fish stalls lack clear, exhaustive information that would help consumers compare the various products on offer. Information displayed on fresh sea product packaging, if available, is usually limited to the trade name, Latin name, weight, price per kilo, fishing ground and use-by date. Depending on the degree of staff involvement and retail theatre on and around the fish stall, consumer information at the point of sale can be exhaustive and efficient. But consumers no longer benefit from such information once at home. Product labelling and packaging may then be used to relay point-of-sale information. The same applies to promotion. Even the most efficient retail theatre scheme ceases to be effective when the consumer leaves the outlet. Using product packaging as a promotional channel would help maintain the contact with the customers into their home and reach other household members.

Protection / transport: The protection and transport functions of fresh sea product packaging can also be improved. Traditional itinerant fishmongers usually use paper and/ or plastic bags whilst sedentary fishmongers use self-adhesive or heat-sealable packaging. These types of packaging have a number of shortcomings. The first concerns the exudates that packaging may fail to prevent from leaking out. The second is linked to the non-rigid nature of fish packaging, which may be a problem during transport and storage in the consumer's home. If pierced or crushed during transport, the packaging no longer fully performs its protective function. And during storage, non-rigid packaging tends to take up a lot of fridge space. The success of self-service sea products partly comes from the fact that they are sold in trays that are easier to transport and store in the refrigerator. *(Fasquel et al., 2013)*.

LThe British firm "The Big Prawn Co" is fully aware of this issue and sells frozen vacuum-packed shellfish placed in a cardboard secondary packaging. This facilitates storage in the freezer and ensures

optimum thawing conditions when placing the product in the refrigerator the day before eating it. The impact of this secondary packaging is minimal as cardboard is recyclable, which is not the case of plastic bags, dirty wrapping paper or heat seal bags, the latter being often lined with plastic. This system was developed for frozen food but could be adapted to fresh products.

Services

"Services: act of making a technical or intellectual capacity available" (INSEE, 2014)

The definition of services by INSEE – the French national Institute of Statistics and Economic Studies - is interesting in that it insists on the dual nature of services, which may involve "technical or intellectual" capacities. What services should consumers of fresh sea products be offered? "Technical" capacities would concern the product itself, whereas the so-called "intellectual" ones would be directed at the consumer. Services can therefore help consumers access the product in different ways.

Information: Consumer services in the form of information may cover a number of consumption aspects. They can help overcome a major obstacle to seafood purchasing, namely the difficulty in understanding and choosing between the various products. Educating consumers by giving them the necessary consumption keys is a service that is already provided but not fully exploited. Promotion, i.e. putting forward certain products based on the season, would help realign demand with production realities.

Design: Another way of guiding consumers in their approach to fresh sea products is to overcome their "fear" of the product, another obstacle to consumption. Faced with raw products they do not know how to cook, customers often feel helpless and prefer to buy more intuitive, convenient and immediate products, to the detriment of fresh ones. By making fresh products more attractive, **component cooking** is a good compromise between helping the consumer and preserving the raw characteristics of fresh products. "Kits" containing all the necessary ingredients clearly have their place on the fish counter. To a lesser degree, proposing a sauce or a recipe also saves consumers precious time once at home. Provided with all the necessary indications, and even ingredients, no time is wasted in wondering how to prepare the product.

***COMPONENT COOKING OR SPEED SCRATCH:** component cooking or speed scratch consists of using semi-prepared ingredients. The difference with ready-meals is that the cook remains in charge of finishing the dish. (Fasquel et al., 2014).*

***WILLINGNESS TO PAY: Willingness to pay (WTP)** is the maximum amount a consumer/buyer is willing to pay for a good or service (Lehu, 2012). This limit set by the consumer depends on his appreciation of the product, its qualities and services.*

Preparation: In the same spirit as component cooking, product preparation can also be considered to be a service. The range of services readily available free-of-charge to consumers includes scaling and filleting and could be extended to more elaborate services. The more complete nature of these services would justify paying an additional price, with the perceived service increasing consumers' **willingness to pay.** The services provided must contribute to developing fresh sea product consumption, for example by partially preparing the fillets on the whole fish, without fully detaching them. This would encourage consumers to cook the whole fish, whilst making it easier for them to remove the fillets at the end of cooking time. Consumers would therefore benefit from cooking the whole fish, with all the advantages of the fillet.

Widening the choice on offer on the stall with additional products can also be viewed as a service. Following the logic of a re-conceptualisation of the sea product universe (see the "Reconceptualising seafood sales outlets" booklet), consumers could be presented with products to complement their meals. Lemon, white wine, finger wipes and other related products can be displayed near the stall to help consumers visualise their meals and make them stop at the fish counter, all the ingredients necessary for cooking sea products being available in the same place.

CAUTION: Discussions with fishing professionals showed that regulations can prove a significant barrier to the provision of services. Before offering a new service at the fish counter, carefully attention should be paid to the legal intricacies. The constraints are such that a simple initiative may turn into an extremely time and/ or money consuming task.

Function

Reconciling the new consumption patterns and fresh sea products requires taking a closer look at product functions. Each product has one or more functions, depending on when it is consumed, how it is presented and so on, and plays a given role in a consumer's diet. Providing consumers with products that meet their expectations in terms of convenience and meal perception is a good way of encouraging them to buy fresh seafood. This means complementing and boosting the traditional offering with products whose concept, presentation and packaging correspond to French consumers' new eating habits. Again, retailing can be adapted by creating a self-service area or the option of shopping at the fish counter in "just 10 min." by offering a limited selection of easy to cook products. Presentation can also be altered to propose different cuts suitable for preparing fish-based sandwiches, salads, etc. "Ready to cook" or "ready" products also have their role to play in this type of approach.

Snacking, rapidity and convenience are the watch words. The aim is to give the product an additional function to its nutritional one. "Smart shopping" can be a first approach to fresh products, the objective being to attract new customers and then presenting them with more traditional items.

Image

Image is an extrinsic product feature that must not be neglected. It acts on a more or less rational part of consumers' minds but can prove extremely powerful in building loyalty. Sea products already benefit from a strong image and good emotions. Although tarnished by a number of concerns (pollution, environmental issues...) the image of sea products, and that of fresh sea products in particular, is highly positive (see previous pages). Never hesitate to use this resource and highlight the natural, traditional aspect as well as the health benefits of seafood. Since these marketing strategies are already known, original initiatives should be favoured. Product images can be used freely but they are also highly codified: boldness can rapidly pay off as long as faux-pas are avoided.

Process

The case of the process, or production method, is a little unique. Neither an intrinsic or extrinsic quality, the process can be viewed as an extrinsic feature if promoted by communication. It then becomes a component of product image that is unique in that, in the case of fresh sea products, the production method does not always have an impact on product quality. The production method (or catching method for wild products) can however be promoted by highlighting fishing techniques or grounds on the fish stall or counter, following the example of existing labels and brands. Having lost confidence in the agribusiness, consumers want information on the origin of the products they buy. Being able to promote the know-how of fishermen is an asset for sea products. In the case of delicatessens, a sign reading "prepared on site" or similar can be displayed provided the products are actually prepared by the fishmonger.

Working on the extrinsic features of fresh sea products can help encourage consumers to buy them, but this is not the only option. Professionals are free to use their expertise and find ways of integrating fresh sea products into the new consumption patterns described in this booklet. Processing and the presence of processed products on the fish stall should not be ruled out. It may even be unavoidable if it can contribute to giving fresh products a new impulse. It is certainly an avenue that should be explored.

Conclusion

The consumption of fresh sea products in France is a little paradoxical. Despite a strong desire to return to more natural, less processed and more local products, the average French consumer basket is changing, with delicatessens and other industrialised food increasingly replacing fresh, raw products. This gap between fresh sea products and changing consumption patterns creates barriers. Far from being insuperable, these barriers are the result of increasingly poor product knowledge.

The challenge is to make consumers feel sufficiently confident to buy fresh, raw products instead of the ease of industrially processed food. This ease is anyhow fairly relative as fresh products are accessible to all consumers, provided they are made aware of them and properly supported and, if necessary, taught more about them. It is up to each professional to use their skills to promote fresh products and emphasise the many benefits of this product category.

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This technical guidebook was prepared by the Studies and Transfer Team of the Fisheries and Aquatic Sciences Centre - AGROCAMPUS OUEST in collaboration with NORMAPÊCHE BRETAGNE, the lead project partner, with support from Brittany Regional Council.

This document should be referred to as follows:

FASQUEL Dimitri, LESUEUR Marie, GOUIN Stéphane. 2014. *Consumption of fresh sea products.* Technical guidebook. Cogépêche programme. Les publications du Pôle halieutique AGROCAMPUS OUEST, 24 p.

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Project led by:

Project certified by:

With the financial support of: