# SEAFOOD-STUDY 2015-2016.
# THE SPANISH MARKET

BY HILDEGUNN F OSMUNDSVÅG

www.mardenoruega.es

THE SPANISH SEAFOOD CONSUMPTION DROPPED IN THE LAST FOUR YEARS.

HOW OFTEN IS FISH [illegible] GRILL?

HOW MANY EAT A LOT?

WHO EAT BACALAO?

WHO EAT MOST FISH?

WHO EAT LESS FISH?

WHICH FISH SPECIES?

HOW MANY NEVER EAT FISH?

WHAT ARE THE DIFFERENCES IN AGE?

HOW OFTEN DO THEY EAT SUSHI?

CHILDREN LIKE FISH?

RESTAURANT OR AT HOME?

WHY DO PEOPLE EAT LESS SALTED COD?

WHAT ARE THE MAIN REASON FOR EATING FISCH?

HOW MUCH DEEP FROZEN FISCH?

WHO EAT MOST SUSHI?

HOW MUCH FRESH FISH?

DO THEY KNOW HOW TO COOK?

WHY ARE PEOLE EATING FROZEN?

WEEKEND OR DURING THE WEEK?

HOW IMPORTANT IS SUSTAINABILITY?

HOW MANY MEALS WITH FISH DOES THE SPANIARDS EAT YEARLY?

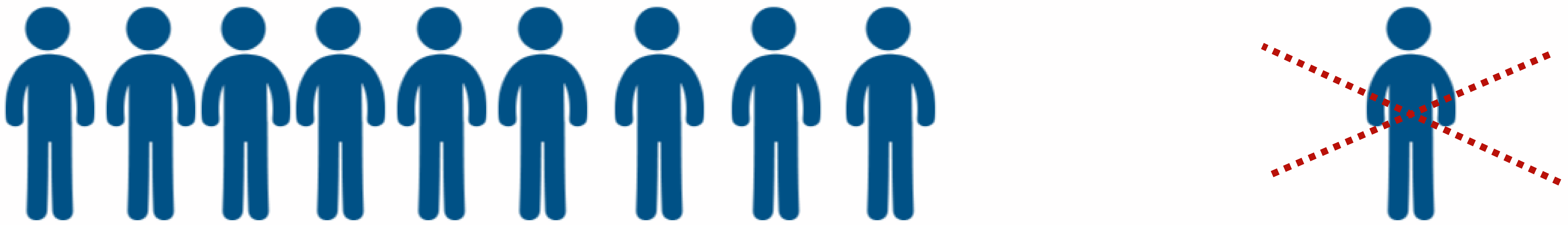
# MANY QUESTIONS THAT NEEDS ANSWERS.

# AGENDA

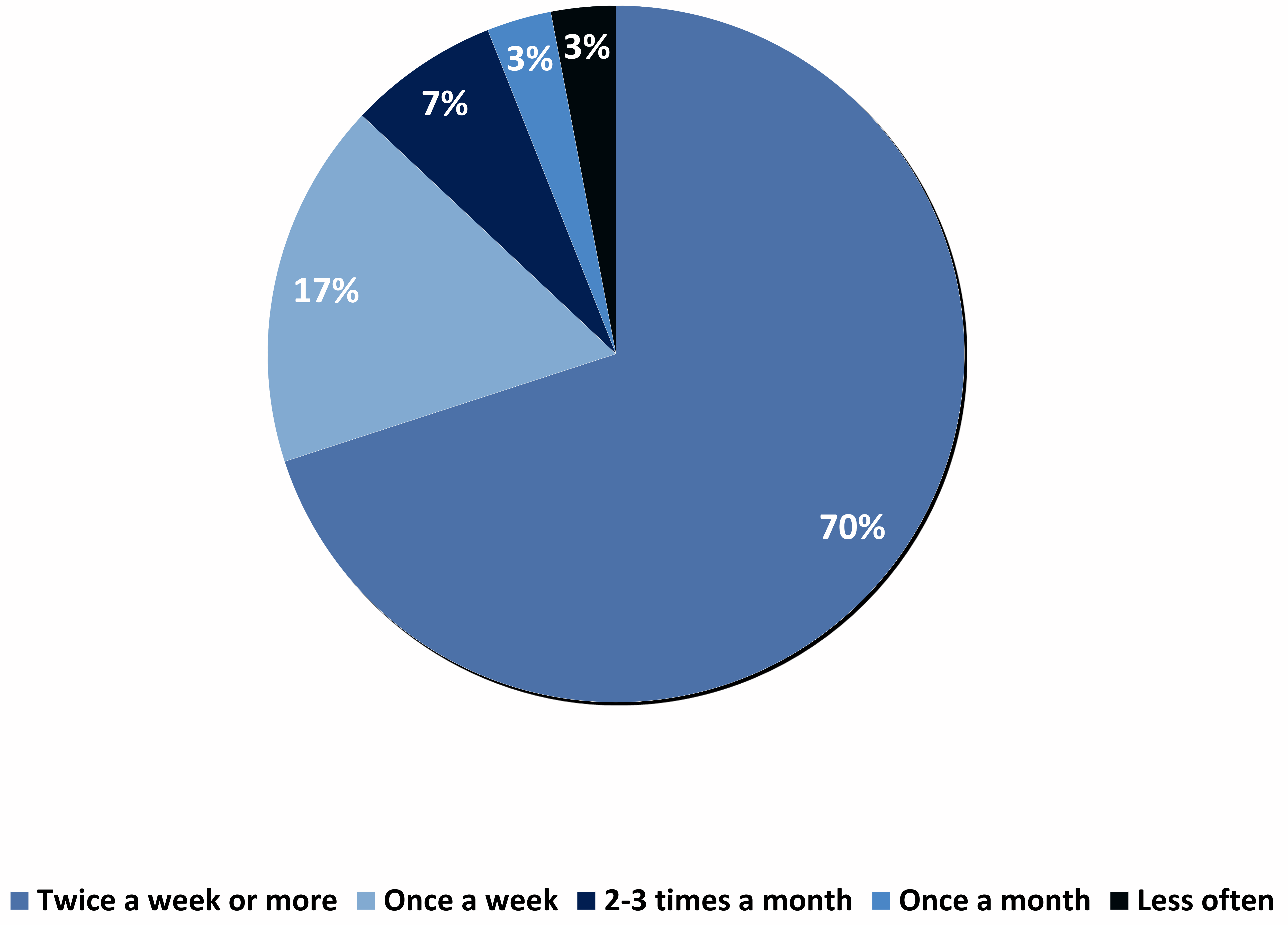
1. FISHCONSUMPTION WITH EXAMPLES FROM NSC
2. BUYING AND EATING HABITS
3. ORIGIN
4. SUMMARY

# FISHCONSUMPTION

# AS MANY AS 90 % OF SPANISH CONSUMERS EAT FISH AT LEAST ONCE A WEEK



# HOW OFTEN DO THEY EAT SEAFOOD?



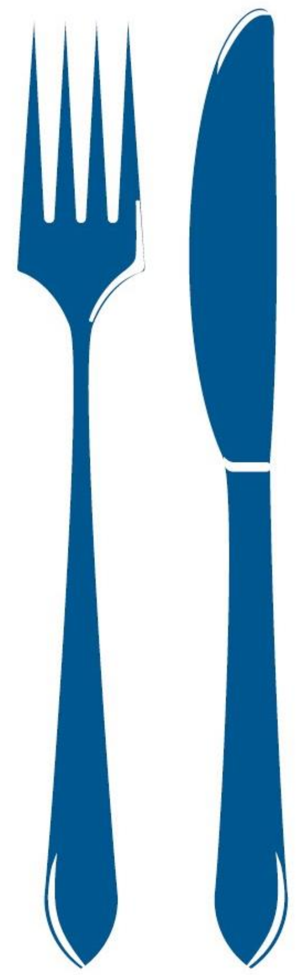



Fig: Overall frequency of eating fish

THE HIGH FREQUENCY IS A RESULT OF TAPAS AND SMALLER SEAFOOD MEAL.

IF SPANISH PEOPLE WOULD MAINLY EAT SEAFOOD AS A MAIN MEAL THE CONSUMPTION WOULD EXCEED 110 KILO PER CAPITA.

FIRST LEARNING: WE NEED TO SEE IF FREQUENCY HAS DECLINED OR IF THE AMOUNT OF FISH WITHIN A MEAL HAS DECREASED TO FIND THE ANSWER.

# SPANISH PEOPLE EAT SEAFOOD MORE OFTEN

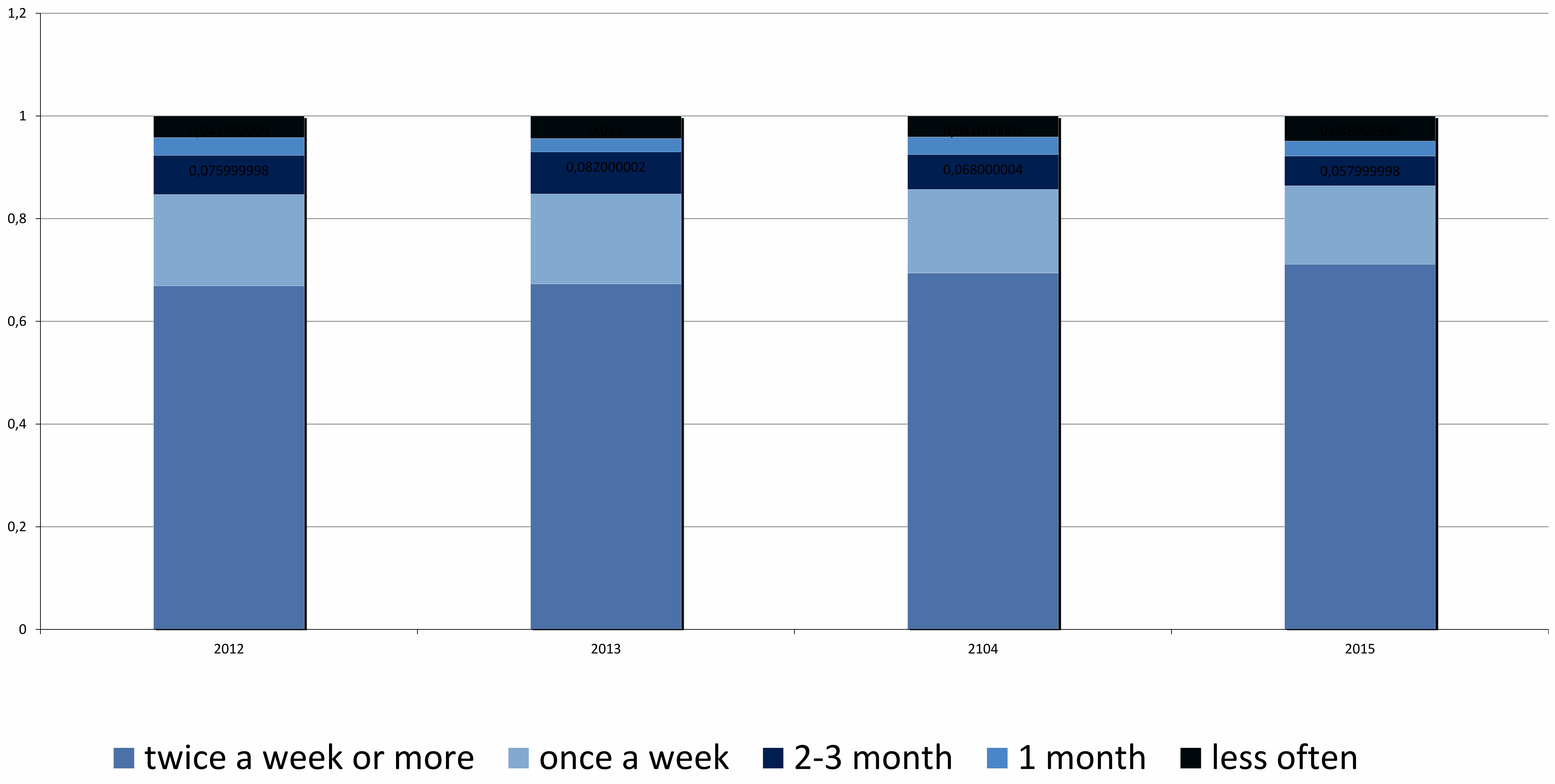



Fig: Development of frequency

# ALL AGE GROUPS EAT SEAFOOD MORE OFTEN THAN BEFORE

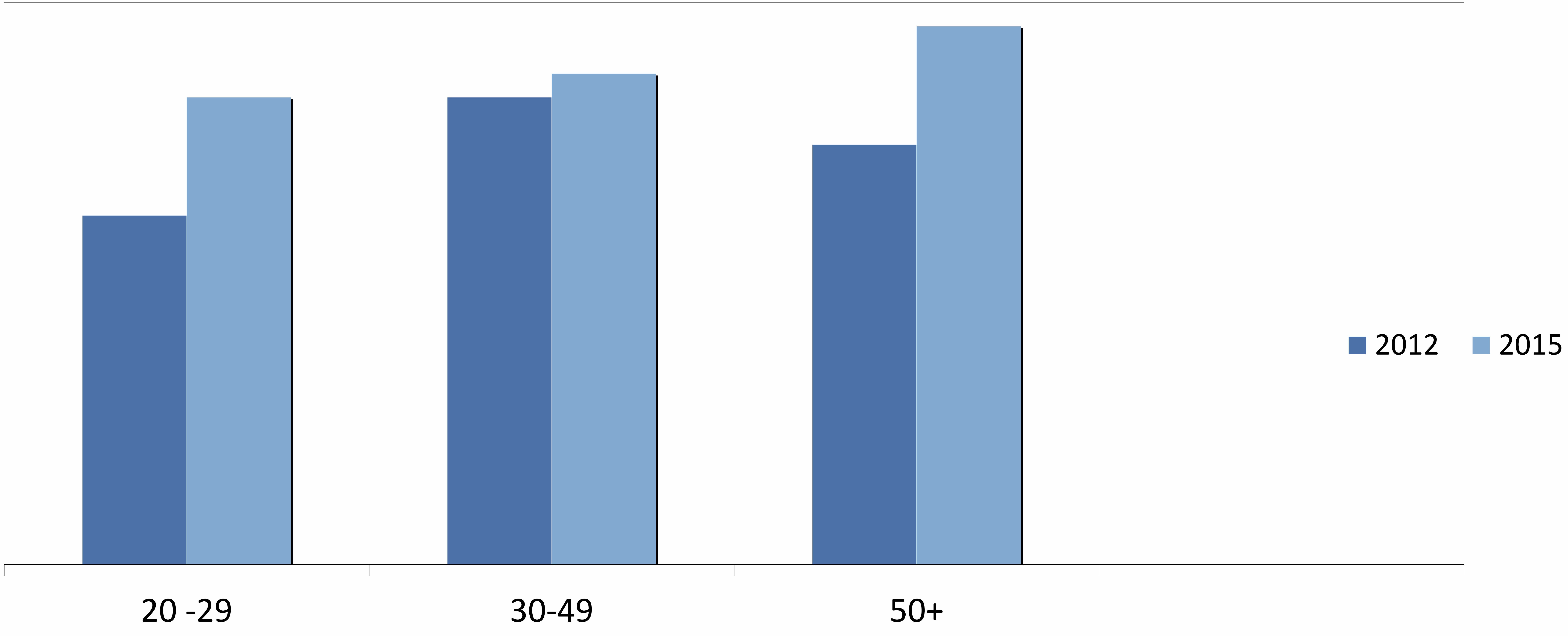



Fig: Frequency of eating seafood by age

# THE LOWER INCOME GROUP CLEARLY EAT LESS OFTEN SEAFOOD NOWADAYS

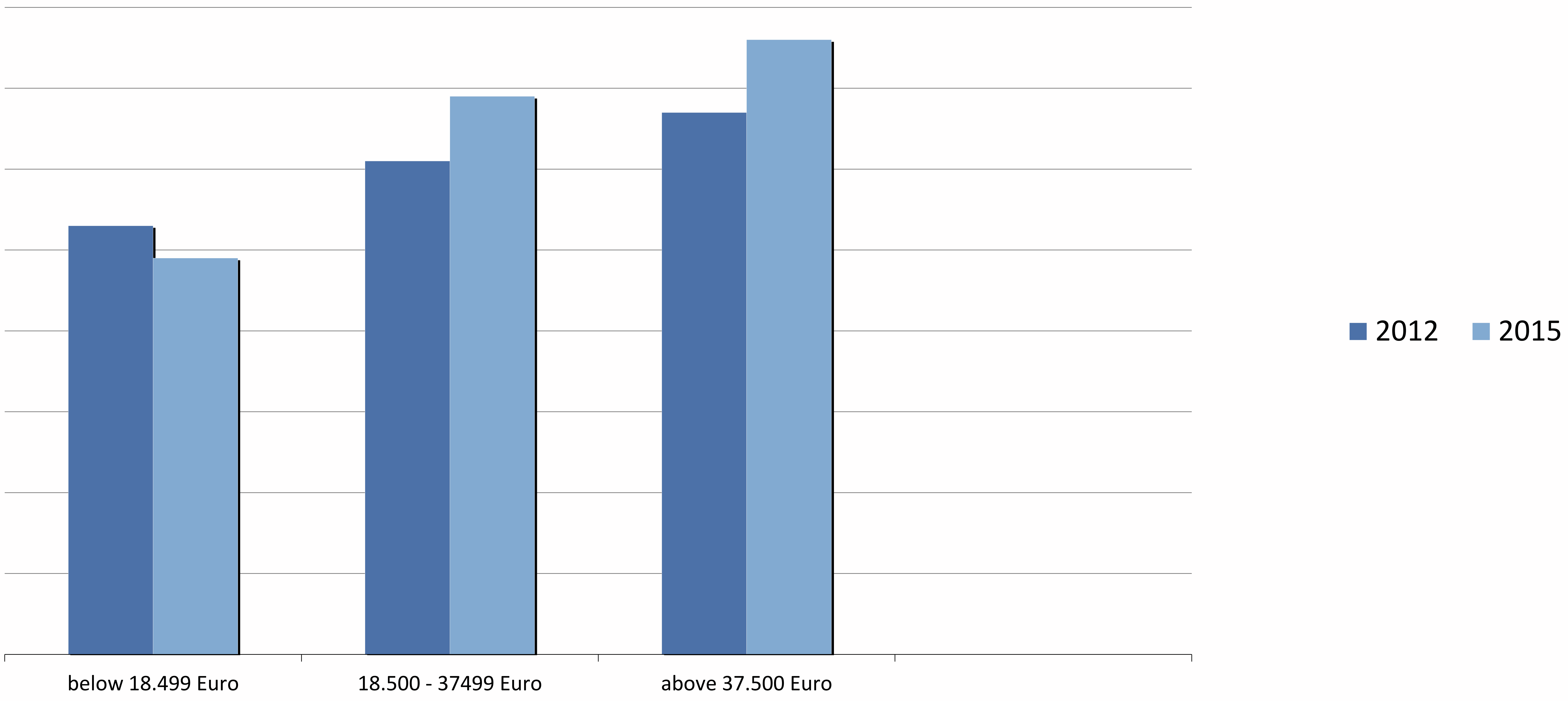



Fig: Frequency of eating seafood per income group

SO IF THEY EAT MORE OFTEN, WHY HAS THE SEAFOOD VOLUME DECREASED?

ONLY ONE EXPLANTION - THEY BUY LESS AND THE AMOUNT IN A SEAFOOD MEAL IS SMALLER.

SECOND LEARNING: WE HAVE TWO POSSIBILITIES TO GET CONSUMPTION BACK.

INCREASE FREQUENCY IN THE LOWER INCOME GROUP.

INCREASE THE SIZE OF SEAFOOD IN A MEAL.

CONSUMPTION BY AGE IS NOT A SURPRISE.

THE OLDER, THE MORE FISH THEY EAT.
94%! AT LEAST ONCE A WEEK.

NO SURPRISE: REASON MENTIONED FIRST IS HEALTH.

SURPRISE:

THE YOUNGER PEOPLE, FANCY FISH ALMOST AS MUCH AS THE OLDER ONES.

91% EAT IT AT LEAST ONCE A WEEK.

# FISH CONSUMPTION
## WHERE AND WHEN?

# WHEN DO THEY EAT FISH DURING THE WEEK?

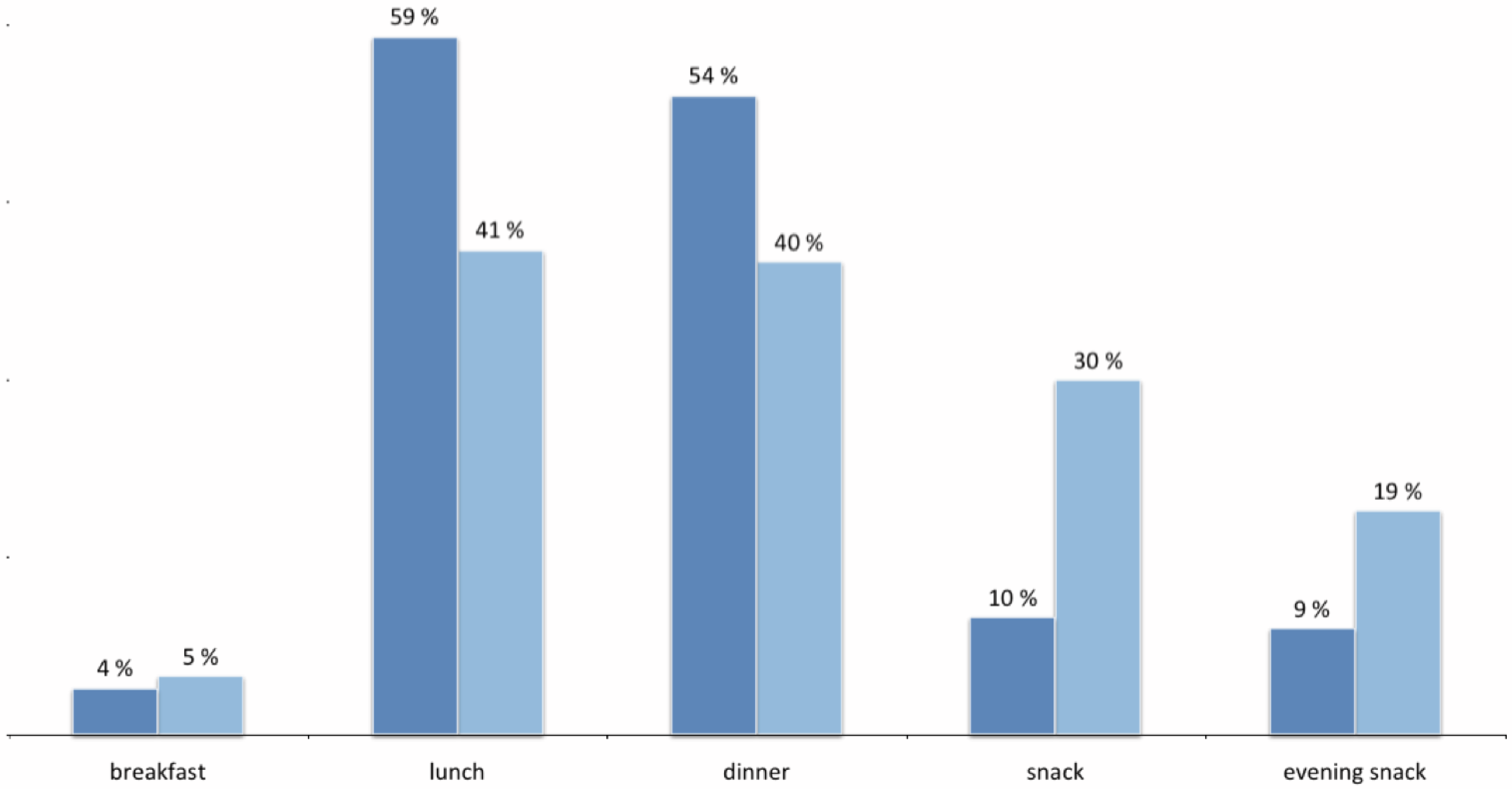
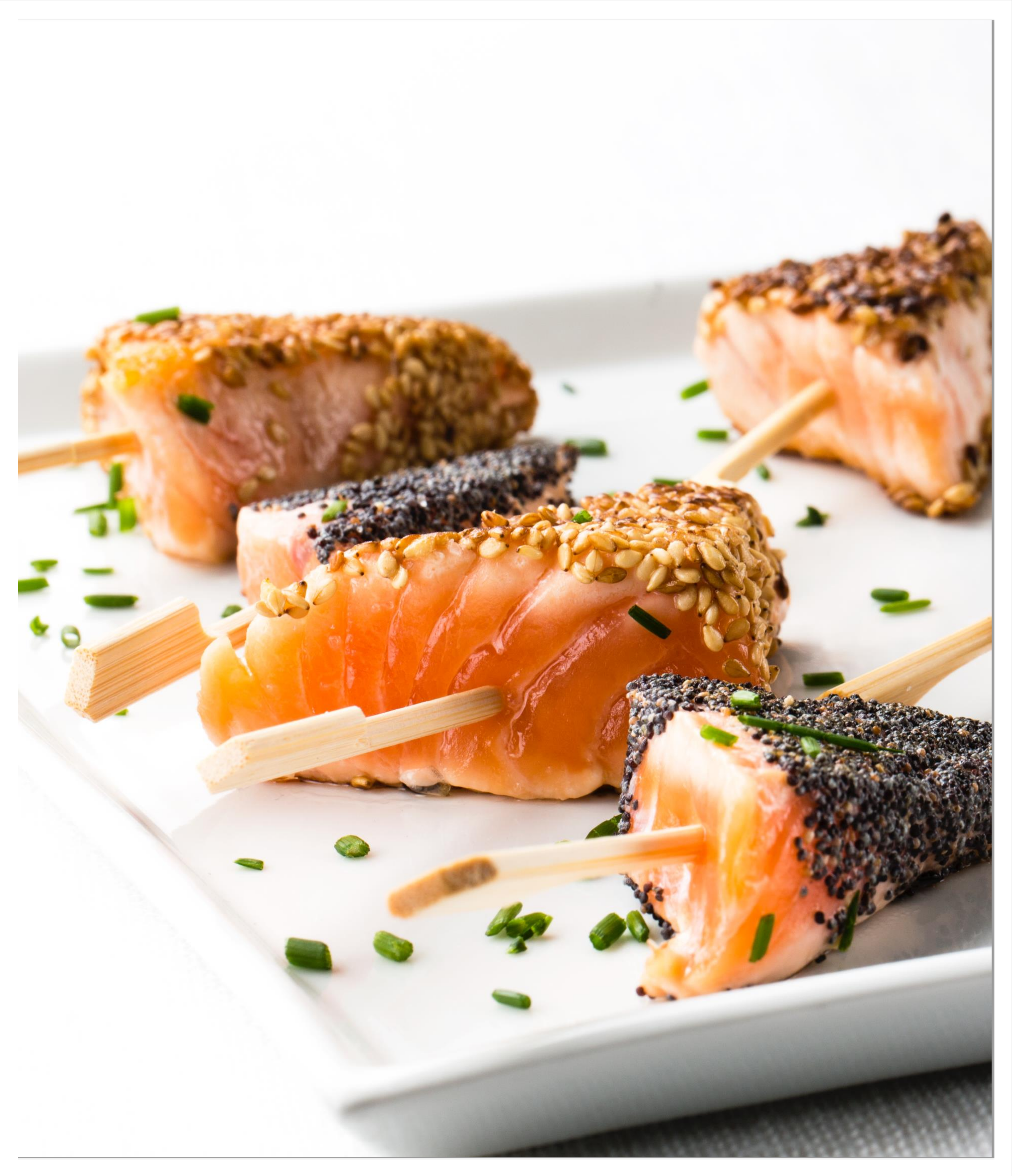



Fig: Occasion for eating seafood during the week

NO SURPRISE:

SALMON = NO. 1

FOR THE YOUNGEST: 26 % PREFER SALMON DURING THE WEEK.



NO SURPRISE:

HAKE = NO. 1

IS THE SPECIE FOR THE 50+ WITH 38% PREFERENCE DURING THE WEEK.

SPANISH PEOPLE EAT A LOT OUT OF HOME

20% LESS SPENDINGS NOW COMPARED TO 2010

WHAT ABOUT SEAFOOD?

# OUT OF HOME IS NOT THE BIG VOLUME DRIVER FOR SEAFOOD IN SPAIN

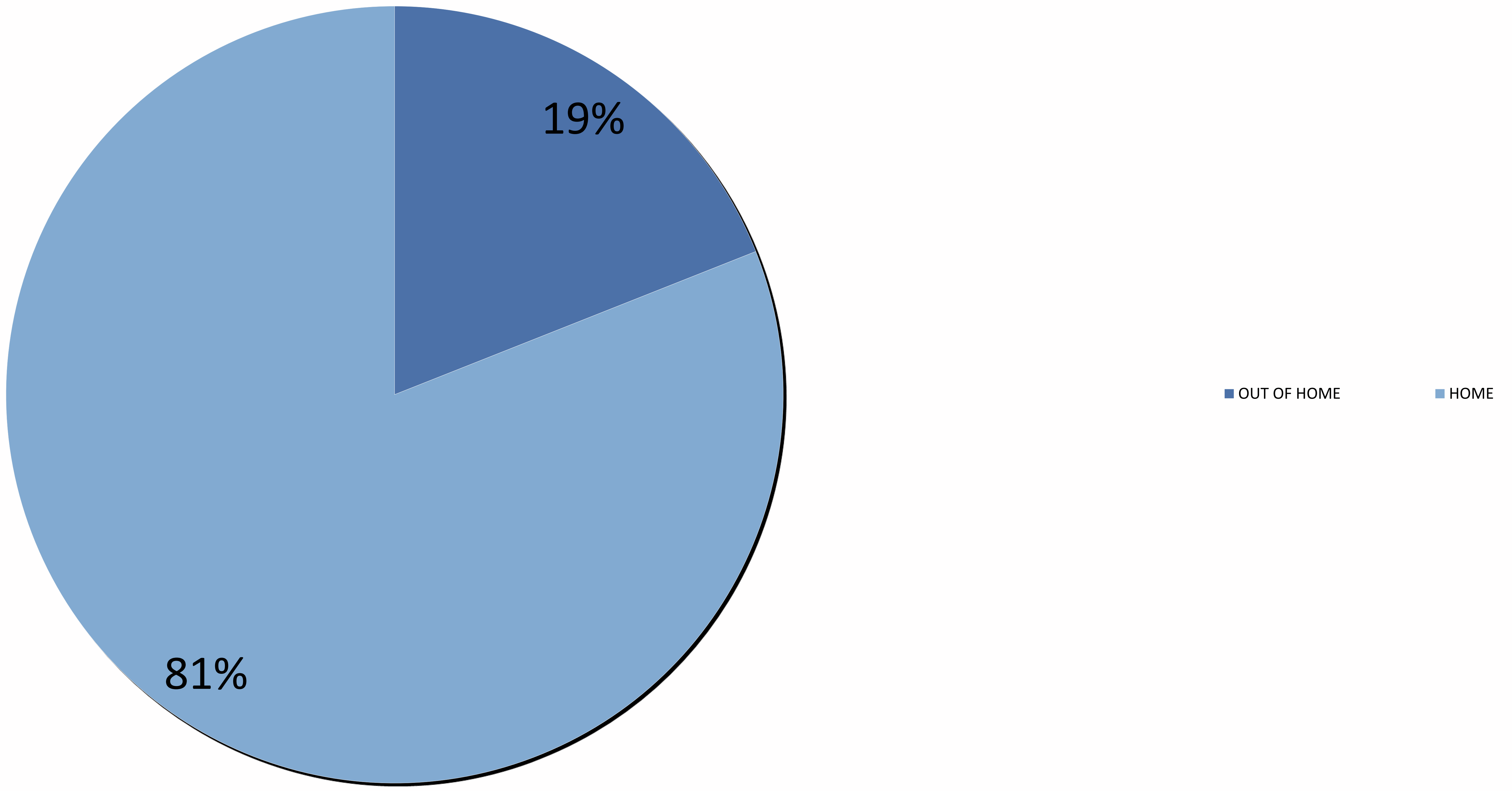



FIg: Out of home consumption of seafood.in volume 2014

INSIGHT: TO GROW THE SEAFOOD MARKET, WE SHOULD FOCUS ON HOME CONSUMPTION WHEN WE COMMUNICATE WITH THE SEAFOOD CONSUMER.

62 % IS ORDERING FISH WHEN EATING OUT AT LEAST ONCE A MONTH.

INSIGHT: SALMON STILL HAS A NUMBER “2 POSITION” WHEN EATING OUT.

MANY UPPER LEVEL SPANISH RESTAURANTS ARE RELUCTANT TO PUT FARMED SALMON ON THEIR MENUE..

# FISHCONSUMPTION
## SUSHI

# 40%

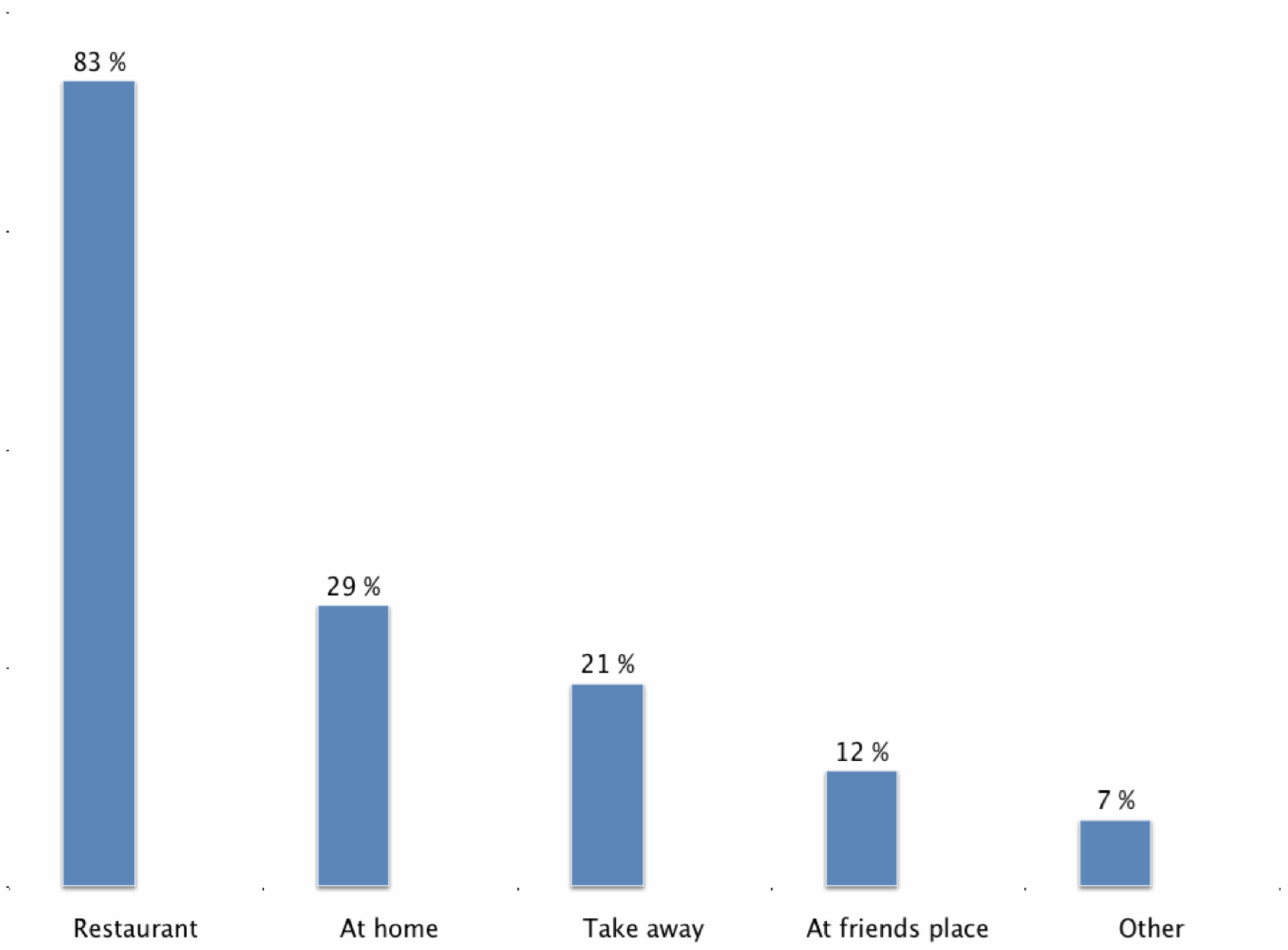
OF THE SPANISH EAT SUSHI AT LEAST ONCE DURING A YEAR.

27% OF THE YOUNG TARGET GROUP EAT SUSHI AT LEAST ONCE A MONTH.

THE HIGHER THE INCOME, THE MORE SUSHI THEY EAT.

SUSHI IS STILL A TRENDY PRODUCT FOR HIGHLY EDUCATED YOUNGER PEOPLE.

# MOST OF THE SUSHI IS CONSUMED OUT OF HOME




IF SUSHI AT HOME:

MOST LIKELY FROM TAKE AWAY OR SUPER-MARKET

Fig:Place of consumption for sushi in Spain

# FISHCONSUMPTION

## MAIN REASONS

87% CLAIM HEALTH TO BE THE MAIN REASON FOR FISH CONSUMPTION

59% GOES FOR TASTE AS THE MAIN REASON

# THERE IS A CHANGE IN THE MOST IMPORTANT REASON

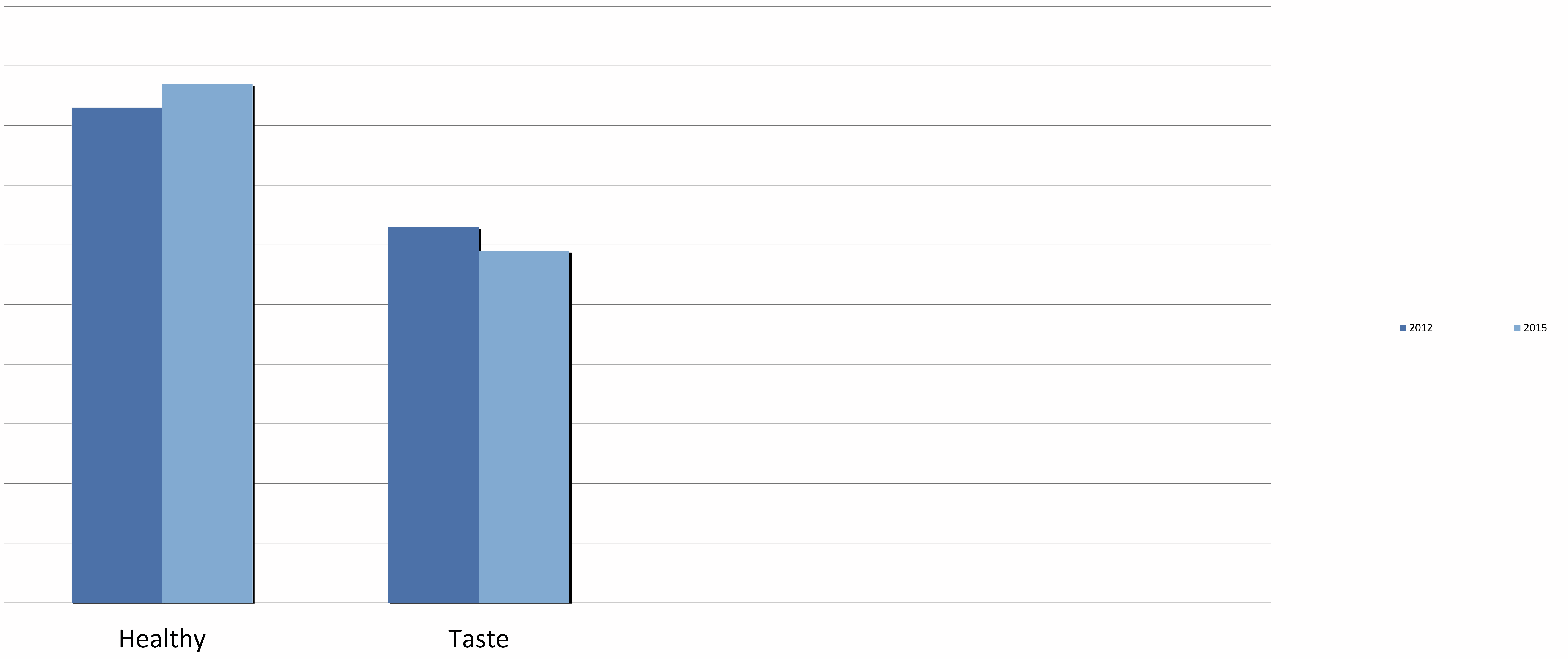



Fig:Main reasons for eating seafood over time

INSIGHT: HEALTH IS A STRONGER REASON THAN TASTE.

THIS IS AN ISSUE TO BE AWARE OF IN THE FUTURE, SINCE TASTE IS THE MAIN DRIVER FOR CONSUMPTION.

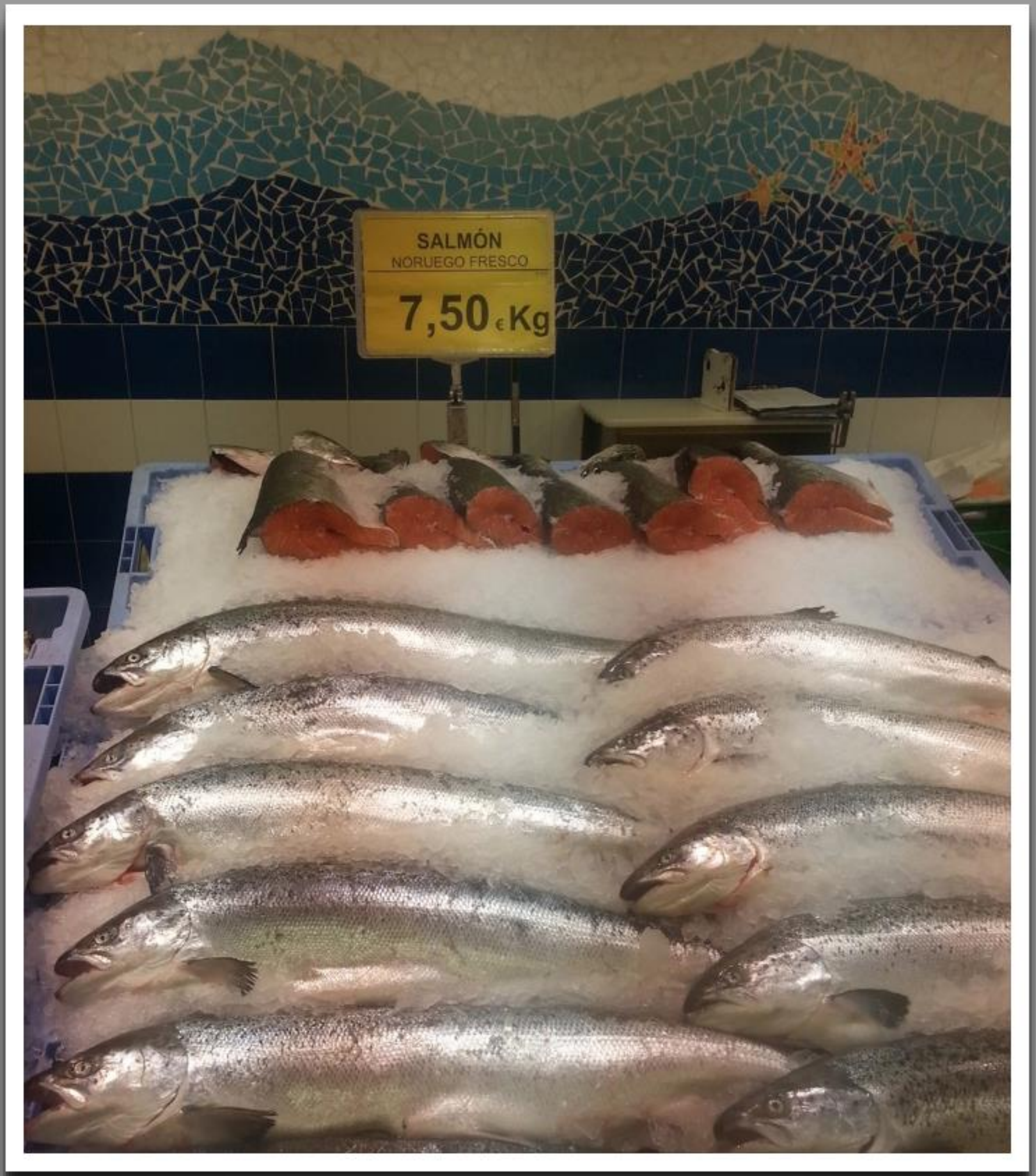
# BUYING AND EATING

SPAIN IS A FRESH MARKET
73% IS BOUGHT FRESH.

ONLY 27% IS FROZEN.

80% OF THE SALMON IS BOUGHT FRESH.

97 % COMES FROM NORWAY.



# MAIN REASON FOR THE SALMON GROWTH

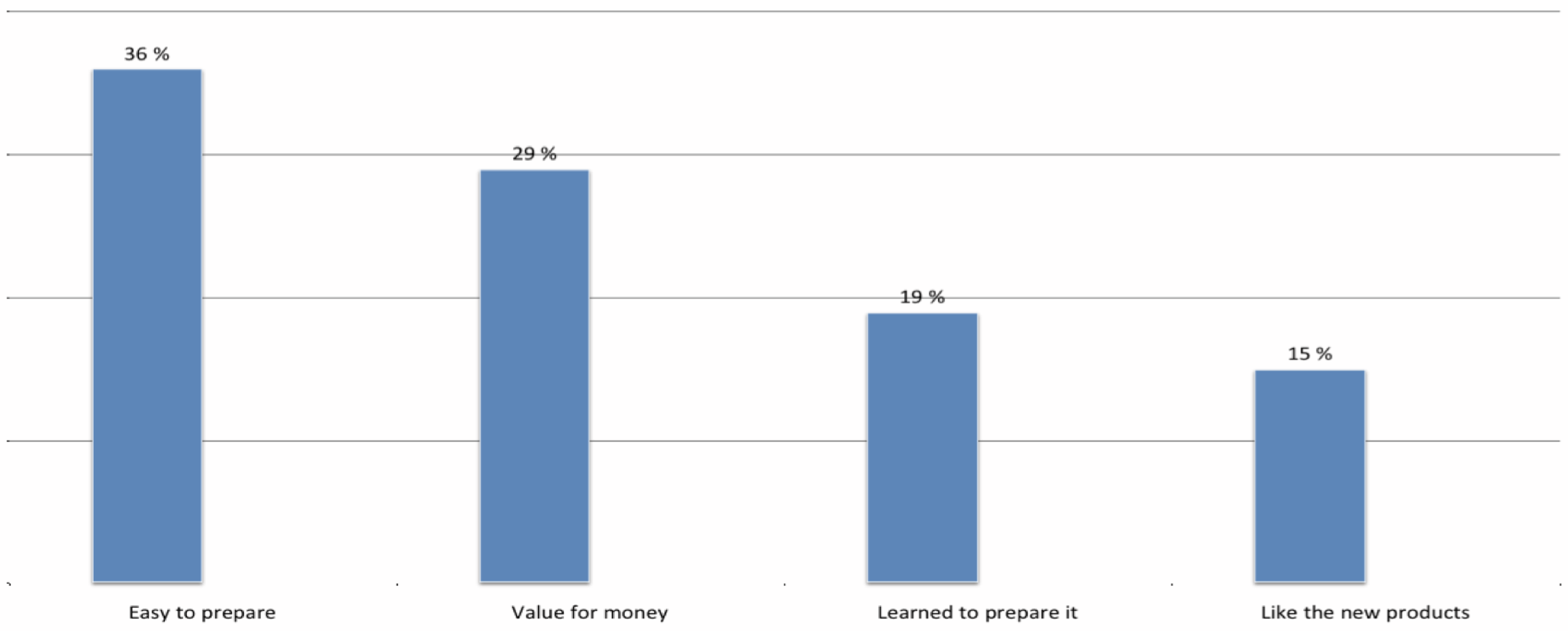
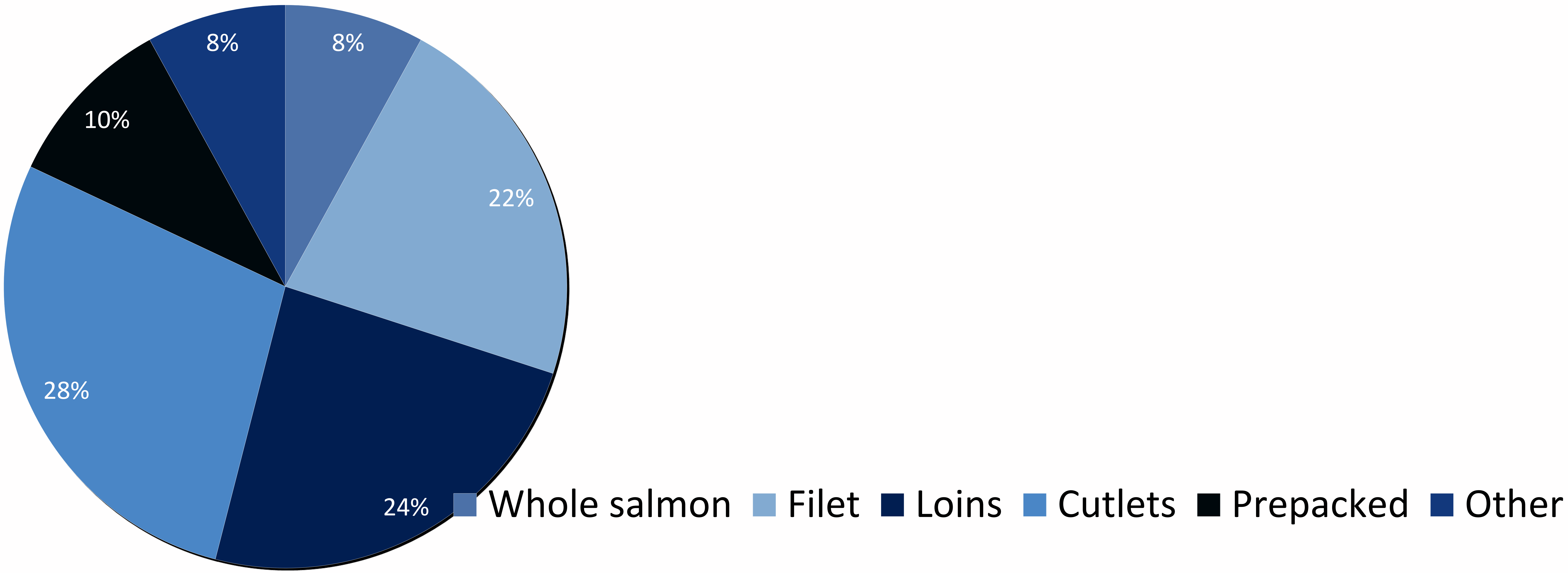



Fig: Reasons for buying more salmon than before

# HOW THE SPANIARDS BUY  SALMON



34% IN THE AGE 50+ BUYS CUTLETS

26% IN THE YOUNGEST GROUP BUYS FILET AND LOINS

WE THINK CUTLETS IS EQUAL TO LESS VARIATION FOR DISHES.

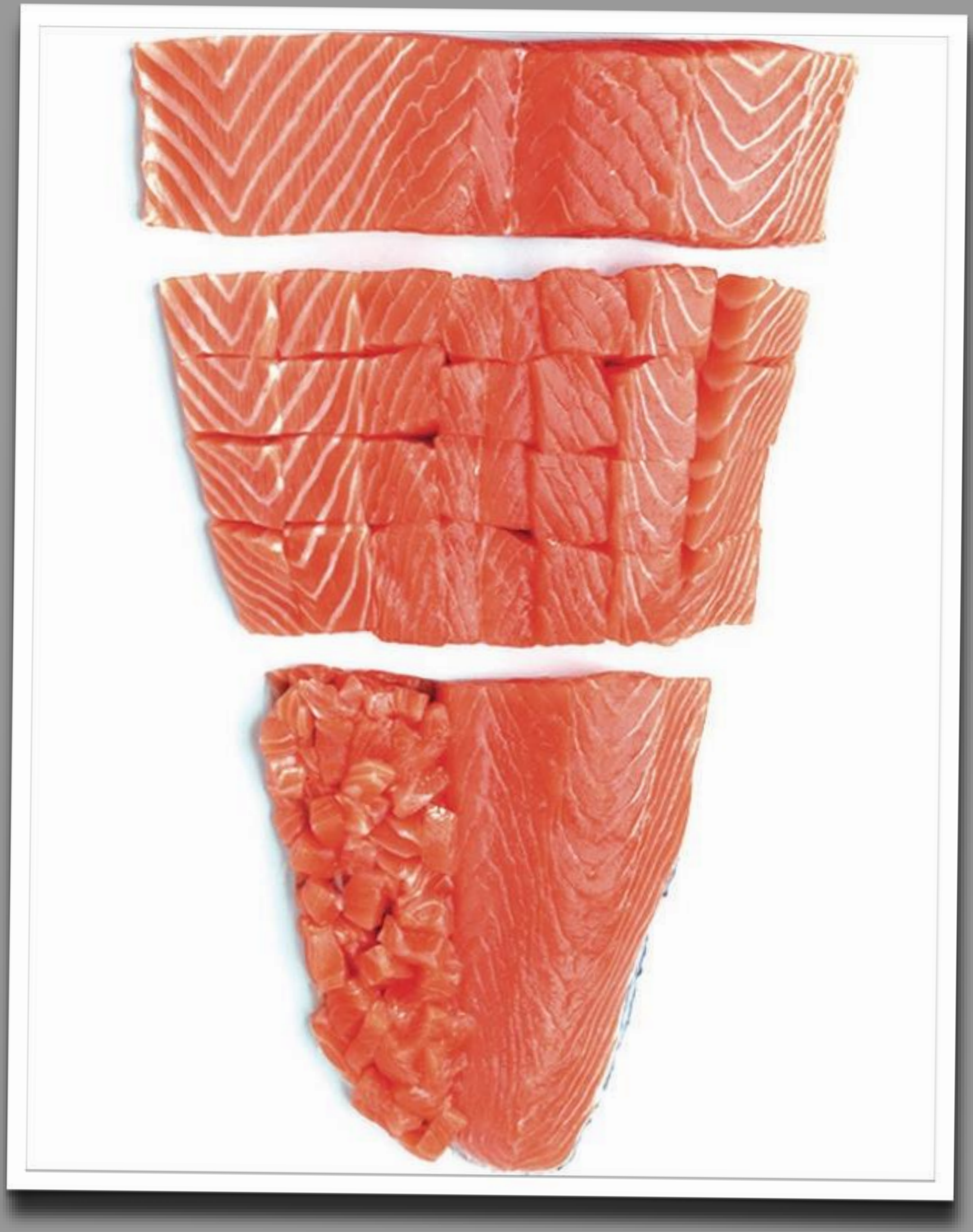


Fig: Overall frequency of eating fish

12% A LOW NUMBER THAT IS BUYING THE SALMON AS PREPACKED

- 29% DO NOT KNOW IF FRESH
- 18 % DOES NOT INSPIRE
- 14% NOT IN THE CUT I WANT

## WHAT DO CONSUMPERS WANT AND WHAT WOULD RAISE THEIR SEAFOOD CONSUMPTION?

1. BETTER VALUE FOR MONEY 45%
2. WITHOUT BONES 36%
3. COUNTRY OF ORIGIN 18 %
4. LESS QUE AT THE COUNTER 16%

INSIGHT:  WE CANNOT CHANGE THE PRICE - SO WE NEED TO INCREASE THE VALUE BY GIVING THEM FISH WITHOUT BONES, FILETS AND A CLEAR SIGN OF ORIGIN.

FRESH COD IS A WINNER, BOTH IN VOLUME AND PRICE.
AND IT MAKES THE COD CATEGORY GROW.

FROZEN COUNTS FOR 22% AND IS IMPORTANT AS IT IS STABLE.

# CAMPAÑA SKREI NORUEGO 2016



# CAMPAÑA SKREI NORUEGO 2016


# BUYING AND EATING

## COOKING SKILLS

# WHAT ABOUT THEIR COOKING SKILLS?

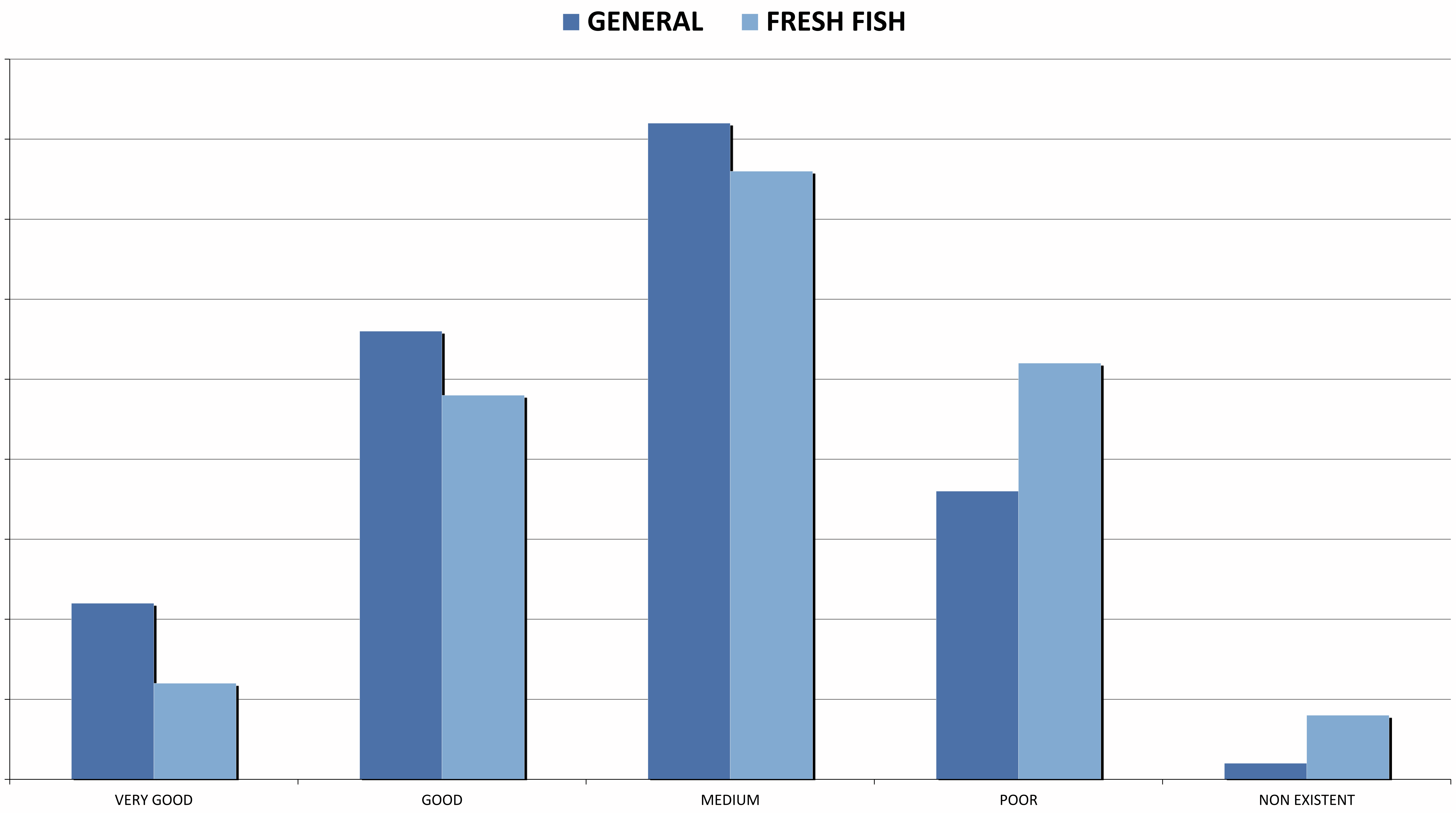



Fig: Cooking skills with fresh fish

# 42%

SPEND 31 TO 45 MINUTES COOKING A MAIN MEAL WITH FISH.

THERE IS NO DIFFERENCE IN TIME SPENT WHEN COOKING WITH MEAT, VEGETABLES, PASTA ETC.

THE YOUNGER THE SPANIARDS THE LOWER THEIR COOKING SKILLS WITH FRESH FISH.

AS MANY AS 70% RATE THEIR SKILLS AS MEDIUM TO NON - EXISTENT.

# 45 %

OF THE TOTAL POPULATION COOK ONLY 1- 3 DISHES WITH FISH ON A REGULARY BASIS.

COMPARED TO MEAT OR VEGETABLES THIS FIGURE IS POOR.

INSIGHT: LOW COOKING SKILLS WITH FRESH FISH AND A VERY LIMITED NUMBER OF “STANDARD“ FISH DISHES MAKES MEAT TWICE AS BIG AS SEAFOOD.

THE LOW FIGURES IN THE YOUNG TARGET GROUP IS A CHALLENGE FOR THE FUTURE.

# BUYING AND EATING

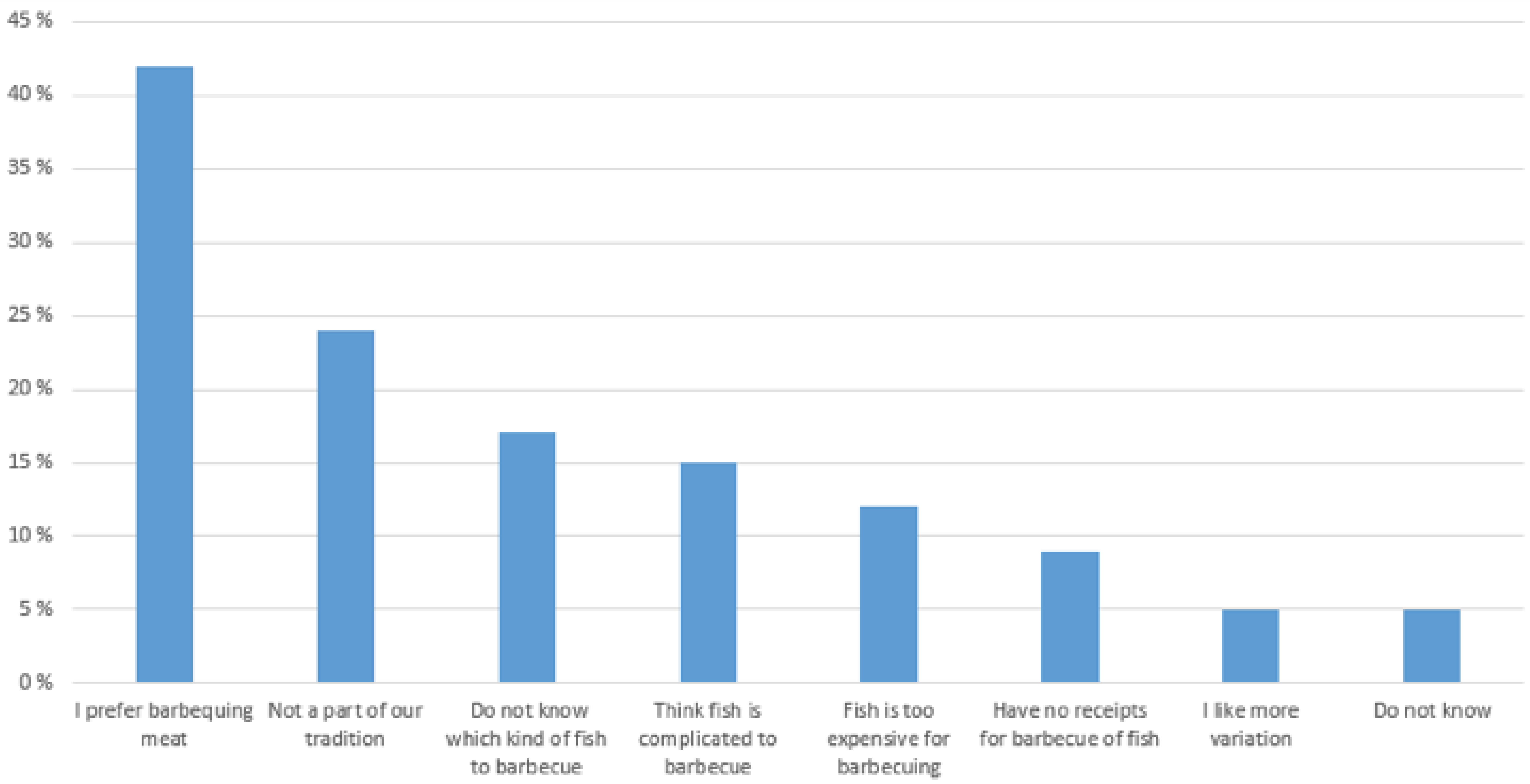
## WHAT ABOUT BBQ?

# 52 % NEVER BBQ FISH

50%

PUTS MEAT ON THE BBQ AT LEAST ONCE A MONTH IN THE SEASON

# THE MAIN REASON FOR NOT BBQ WITH FISH




## FAVOURITE SEAFOOD FOR BARBEQUE

| | |
|---|---|
| Sardine: | 35% |
| Prawn/Shrimp: | 18% |
| Tuna: | 10% |
| Seabass: | 6% |
| Salmon: | 5% |

INSIGHT: TWO MAIN BARRIERES FOR BBQ WITH FISH - TRADITION AND DO NOT KNOW HOW TO DO IT. CAN WE TEACH THEM HOW TO?

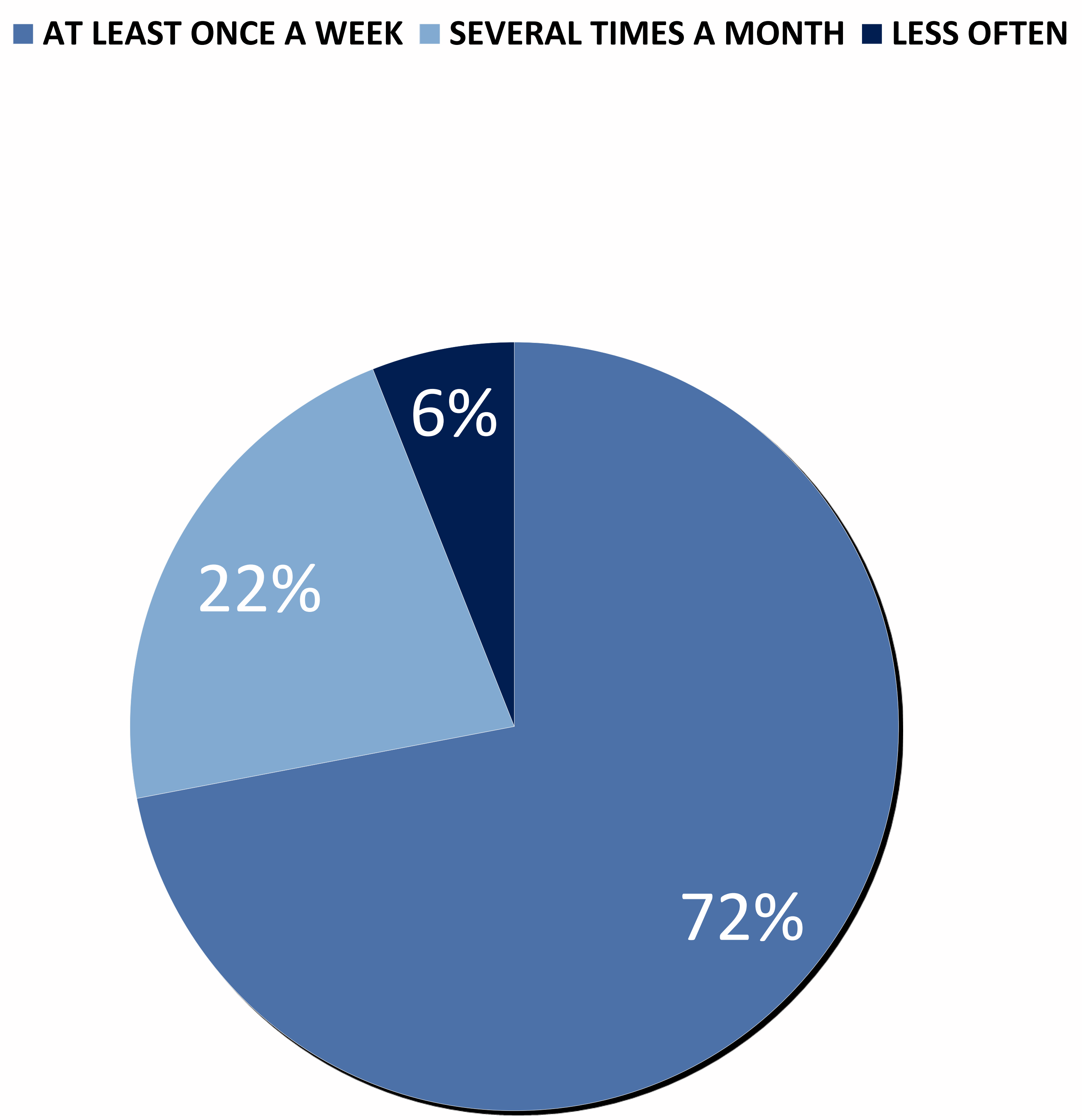
# MARBACOA

## Campaña verano 2016


## Recetas con paso 1-2-3

# BUYING AND EATING KIDS

# SPANISH CHILDREN EAT FISH!




AS MANY AS 79% OF PARENTS SERVES THE SAME DISHES TO THE CHILDREN AS TO THEMSELFES

PROMISING FOR THE FUTURE

Fig: Frequency of seafood eating in the age group of children

27% OF THE PARENTS CLAIM SALMON AS THE FISH THE CHILDREN WANT THE MOST.

NEXT DISH IS THE HAKE (19%).

# ORIGIN

# 76%

CLAIM ORIGIN TO BE IMPORTANT TO VERY IMPORTANT WHEN BUYING SEAFOOD.

# NEW PROJECTS


NUEVO
Trucha del Fiordo
La Joya de los Fiordos Noruegos
NATUR SELECCIÓN
NORGE
mardenoruega.es

# SUMMARY

DESPITE BEING A FISH COUNTRY THE KEY TO SUCCESS IS TO GET FISH ON THE TABLE OF THE YOUNGER TARGET GROUP.

CLEARLY THE BARRIER IS THE LOW COOKING SKILLS. WE NEED TO FOCUS ON HOW TO COOK - RATHER THEN WHAT TO COOK.

WE SAY WE LOVE TO COOK BUT STILL MANY NEEDS HELP IN THE KITCHEN WHEN IT COMES TO FRESH FISH.

EASY RECIPES WITH STEPS 1-2-3 AND MORE PRODUCT READY TO COOK FOR FISH ARE GOOD ALTERNATIVES.

!

TODAY MANY OF THE SPANIARDS DOES NOT HAVE TRUST IN THE VALUE ADDED PRODUCTS.

THIS TRUST HAS TO BE BUILT, BECAUSE IF WE LOOSE THE CONSUMER AT THE FISH COUNTER THE VALUE ADDED COUNTER IS OFTEN NOT AN ALTERNATIVE.

THE RESULT COULD BE THAT OTHER PROTEIN SOURCES ARE CHOSEN OVER FISH

!

THERE IS NO DOUBT ABOUT IT;
ORIGEN MATTERS.

THE CUSTOMERS WANTS TO KOW WHERE IT IS FROM. IN THE FISH COUNTER TODAY THERE IS NOT ENOUGH INFORMATION GIVEN ABOUT ORIGEN.

KNOWLEDGE ABOUT ORIGEN COULD INCREASE THEIR CONSUMPTION.

!

TOGETHER WE NEED TO MAKE FISH AS VISIBLE AS MEAT OR OTHER FOOD.

TODAY FISH HAS A VISIBILITY IN THE FOOD SEGMENT OF ONLY 5% COMPARED TO THE REST.

IF WE WANT TO SUCCEED WE NEED TO JOIN OUR EFFORTS WHERE EVER WE CAN.

!

# Q&A

# THANK YOU