



Deliverable Report

Deliverable No:	D31.16	Delivery Month:	44
Deliverable Title	Promotional workshops for specialized audience in fish market sector (Spain, Greece, UK or Italy) (1st workshop)		
WP No:	31	WP Lead beneficiary:	P18. CTAQUA
WP Title:	Dissemination		
Task No:	31.6	Task Lead beneficiary:	P18. CTAQUA
Task Title:	Promotional workshops		
Other beneficiaries:	P1.HCMR	P3.IRTA	P11. AU
	P34.BVFi		P12. APROMAR
Status:	Delivered/delayed	Expected month:	37
.....			

Lead partner preparing the deliverable: Robles, R. (CTAQUA), Mylonas, C.C. (HCMR).

Other partners participating: Matthias Keller (BVFi), Maria Banovic (AU), Javier Ojeda (APROMAR), Luis Guerrero (IRTA)

Objective: To promote project activities and results focused on specific audience, such as fish producers, processors and retailers, consumer organizations, and fisheries and aquaculture authorities.

Description: During the last two years of the project, specialized one-day workshops are organized in specific countries where fish production and processing are relevant economic activities. The workshops are designed for specific audience, such as fish producers, processors and retailers, consumer organizations, and fisheries and aquaculture authorities.

Initially four countries were listed in the DOW as relevant locations for the organization of this activity: Spain, UK, Italy and Greece. From these locations, UK has been changed for Germany due to market and consumer reasons. DIVERSIFY partner P34. BVFi (Matthias Keller) from Germany is a very active partner in terms of contacts with the German fish markets, German fish processors and big supermarket chains. Moreover, Matthias Keller is the managing director of the following professional organizations:

Bundesmarktverband der Fischwirtschaft e.V. (Federal market association of fisheries),
 Bundesverband der deutschen Fischindustrie und des Fischgroßhandels e.V. (German fish processing and wholesale association),
 Fisch-Informationszentrum e.V. (Fish-Informationcenter) and
 Stiftung seeklar“ – Verein zum Schutz der Meere e.V. (“Foundation seeklar“ – Foundation for the protection of the sea).

The federation BVFi has contacts with several governmental organizations, the fishing industry, NGOs and the media, in order to support its members and to promote the image of the German fish-processing sector. On the EU-level, BVFi is a member of AIPCE/CEP. The federation informs its members about relevant



issues for fish processing and wholesaling, such as import tariffs and tariff contingents, EU-policies, quality standards and certification initiatives.

All the above mentioned information and the lack of such a relevant counterpart in UK made much impacting and straightforward for the purpose of the promotional workshops to organize the 1st DIVERSIFY Promotional Workshop in Germany so we could guarantee the right broadcasting of the project activities and evaluate their impact with an adequate representation of fish processing, fish markets and consumers.

The 1st Promotional Workshop was held at the FAIR BREMEN (Messe Bremen), Business Lounge (Hall 7, 1st floor), Theodor-Heuss-Strasse in Bremen, Germany on the 24th of May 2017. The lounge is a room adequately equipped to host these types of meetings and it has an area with food preparation facilities, which was needed for the degustation session of DIVERSIFY products developed in WP28 and WP29 (**Figure 1**).



Figure 1. External view of the Messe Bremen building (left) and facilities (right) where the 1st Promotional Workshop was held.

The agenda of the event was distributed to fish processing and fish industry stake holders in Germany. The event was organized in very close collaboration with the P34. BVFi. The meeting was organized to include six presentations by DIVERSIFY partners and one presentation by Jürgen Pauly, manager of Globus SB-Warenhaus, a very strong German supermarket group with more than 160 hypermarkets and superstores in Germany and 20 more in Europe. After the presentations and the following debate, a degustation session was organized with two of the products developed within the project: grey mullet in olive oil and pikeperch pate (WP 28 Socioeconomics: New product development).

The invitation sent to the participants including the agenda and useful information of the event is included below:



April 5, 2017

On behalf of the **DIVERSIFY** project consortium, we would like to invite you to the 1st Promotional Workshop on May 24, 2017 at the

**FAIR BREMEN,
Business Lounge (Hall 7, 1st floor), Theodor-Heuss-Strasse
in Bremen, Germany.**

This is a half-day workshop intended to disseminate the project results and to provide a forum for discussion on market and consumer attitude towards aquaculture products. The meeting is hosted by the DIVERSIFY partner, Bundesverband der Deutschen Fischindustrie und des Fischgross-handels E.V. (BVFfi) from Hamburg.

WORKSHOP AGENDA

10:00 *Presentation of the project DIVERSIFY.*

Rocio Robles, Dissemination leader. Technical Director, CTAQUA, Spain.

10:20 *The German fish market in figures: Update on valuable data.*

Matthias Keller, Managing Director of BVFfi, Germany.

10:40 *German markets: consumer attitude to new fish products.*

Jürgen Pauly, Category Manager Fresh, Globus SB-Warenhaus, Germany.

11:00 Coffee break

11:30 *Aquaculture products for the long run: Consumer-driven product idea development from Diversify.*

Marija Banovic, MAPP Centre, Department of Management, Aarhus University, Denmark.

11: 50 *Traceability, labelling and certification of fish products.* Javier Ojeda, APROMAR, Spain.

12: 10 *Cross-cultural consumer perception of new fish products.* Luis Guerrero, IRTA, Monells, Spain.

12:30 *Debate: Consumer attitude to diversification in aquaculture fish products: trust of consumers in aquaculture products, sustainability and health-related behaviour.*

Moderator: Marija Banovic.

Panel:



- Matthias Keller, BVFi
- Jürgen Pauly, Globus
- Birgit Schmidt-Puckhaber, Fachzentrum Landwirtschaft
- Javier Ojeda, Apromar
- Luis Guerreño, IRTA
- Machiel Reinders, WUR

Please reply by sending us your name and the name of your company by E-mail or fax until May 19, 2017 to the following address:

Bundesverband der deutschen Fischindustrie und des Fischgrosshandels
Tel. +49 (0)40 38 18 11
Fax +49 (0)40 389 85 54
E-Mail: info@fischverband.de

For parking please use the parking space at Bürgerweide near Hall 7 of the fair.
We are looking forward to meet you for an interesting exchange of news.

With kind regards

Rocio Robles
Dissemination leader

Dr. Matthias Keller
Project partner

The meeting had an attendance of 23 people including professionals from the fish processing industry, the quality control in fish processed products, the frozen fish industry, a State veterinary officer, a representative from the Ministry of Agriculture and the Environment, etc. The list of attendees is included as Annex I of this document.

A poster with a summary of all the relevant information about the project was designed and displayed in the conference room during the meeting (**Figure 2**).

The meeting opened with a summary presentation of DIVERSIFY, given by the WP Dissemination leader of the project (Rocio Robles; **Figure 3**). The main results in the different Research Areas were presented, with special emphasis in the research and results of the Socioeconomic Area. The new product development from the DIVERSIFY fish species and the studies related to consumer attitude and behaviour towards these products were described. The audience was particularly interested in the new product development and how they would be introduced in the market. This interest led to a very interactive discussion among the audience, which continued during the following presentations of the program.



Figure 2. Poster summarizing the main information of the DIVERSIFY project and displayed during the meeting in Bremen for the 1st Promotional Workshop.



Figure 3. Summary presentation of DIVERSIFY by Rocio Robles (P18. CTAQUA) (left); six fish products developed from DIVERSIFY fish species. Grey mullet in olive oil and pikeperch fish pate were tasted at the end of the meeting (right).

The second presentation “The German fish market in figures: Update on valuable data” by Matthias Keller (P34. BVFi) provided an overview of the market performance in Germany for fish and fishery products including products generated by aquaculture. After presenting a supply balance for fish and seafood, information on import and export figures and their development over the last years was provided (Figure 4). On the basis of live weight equivalent, the importance of species and of product categories was summarized.

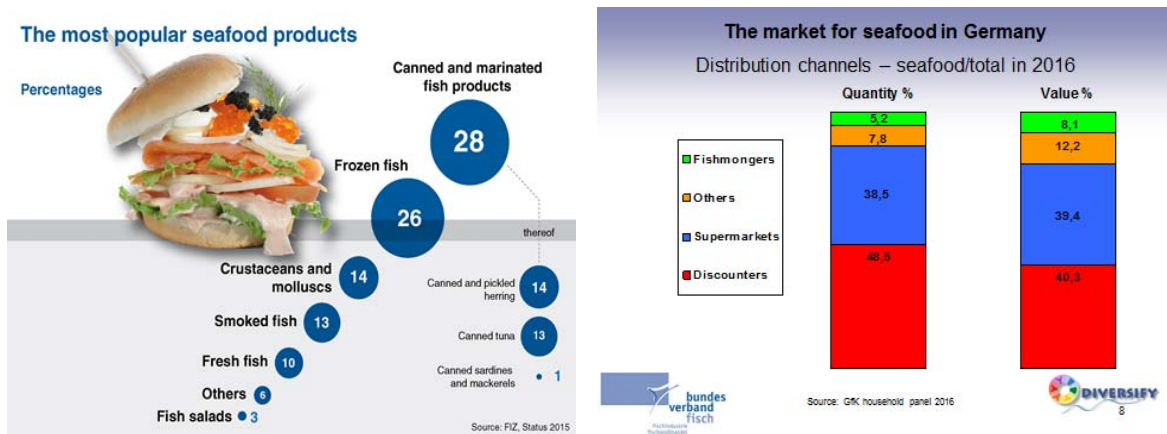


Figure 4. Representative slides of the presentation “The German fish market in figures: Update on valuable data” given by Matthias Keller, Managing Director of BVFi (P34. BVFi).

The following presentation “German markets: consumer attitude to new fish products” was given by Jürgen Pauly, Category Manager Fresh, Globus SB-Warenhaus, Germany. He provided a good insight of the German consumer attitude to new products with the example of two new fish products (tilapia and cobia filet) introduced in the section of fresh fish products in their hypermarket group (Figure 5). It seems that none of the two consolidated as new fish products were accepted by the consumers. Ultimately they just stopped promoting the tilapia and cobia filet and put more attention on Scottish salmon, which seemed to be



very well accepted by consumers. The take-home-message of this presentation was “it is not easy to introduce a new fish product in the market and a strong marketing campaign is a must to obtain a positive response from consumers”.

GLOBUS-experience with new fish species 1


TILAPIA (fresh fillet, skin on), farmed in Poland, GlobalGAP

- April 2015 - January 2016
- first and only offer of fresh tilapia fillet in German retail
- promotions & tastings in every store
- sales price like saithe fillet
- availability in the counter: every day
- sold volumes: very small, not growing over time

→ farming stopped by supplier: no market in Europe

→ same time, independently: sales stopped by Globus

→ no customer acceptance, frozen tilapia fillet preferred further on



GLOBUS-experience with new fish species 2

ASC, COBIA (fresh fillet, skin on, highest omega 3 content), GlobalGAP,

off-shore farmed in Panama, delivered by flight 2x weekly

- April 2016
- first and only offer of fresh Cobia fillet in German retail
- promotions (flyers, recipe cards) & tastings in every store at the beginning
- sales price: upper level (similar thuna)
- availability at most counters
- sales volume: small, depending on tastings/promo, not growing

→ low customer acceptance

→ unfamiliar species






Figure 5. Representative slides of the presentation “German markets: consumer attitude to new fish products” given by Jürgen Pauly, Category Manager Fresh, Globus SB-Warenhaus, Germany.

After the coffee break, Dr. Marija Banovic, from MAPP Centre, Department of Management, Aarhus University (P11. AU) disserted about “Aquaculture products for the long run: Consumer-driven product idea development from Diversify” (**Figure 6**). They have found through the research on the Diversify project that it is possible to develop new aquaculture products targeting early adopters, across big European markets, as they found more homogeneous converging fish-related culture. A similar pattern in consumer choice-drivers has been found. That is, country-of-origin and price come first in terms of purchase drivers, followed by quality certification (i.e. ASC logo), while nutrition and health claims appear to have varying impact and are highly dependent on the type of product (i.e. level of processing) and EU country, showing a need for a certain degree of customization. Further, information around aquaculture products should be more specific and visible so consumers could distinguish these products from their market counterparts. This is especially true as aquaculture is often overshadowed by legitimate doubts projected from less sustainable practices and cheap imports.

FISH TODAY



Consumers facing a choice overload

CONSUMER-DRIVEN PRODUCT IDEAS



Figure 6. Representative slides of the presentation by Dr. Maria Banovic (P11. AU) highlighting the overload of fish product choice for consumers and how the product ideas can be consumer driven.



The next presentation was given by Javier Ojeda from P12. APROMAR and was entitled *Traceability, labelling and certification of fish products* dealing with the very strict EU regulations on safety principles and the protection of consumer's interests (**Figure 7**). The food law is aimed at the reduction, elimination or avoidance of any risk to health. The free movement of safe and wholesome food is an essential aspect of the internal market and contributes significantly to the health and well-being of citizens, and to their social and economic interests. However there is a considerable amount of norms and regulations that are not always easy to interpret and implement. A list of most important definitions on the matter was also presented, for example: *Fishery products*: All seawater or freshwater animals (except for live bivalve mollusks, live echinoderms, live tunicates and live marine gastropods, and all mammals, reptiles and frogs) whether wild or farmed and including all edible forms, parts and products of such animals. *Prepared fishery products*: Unprocessed fishery products that have undergone an operation affecting their anatomical wholeness, such as gutting, heading, slicing, filleting, and chopping.

Standards and certification schemes in aquaculture addressing critical issues about quality, environment, social and animal welfare matters were also mentioned as well as their utility for buyers and consumers.

Information to consumers

Other voluntary information: **Nutritional & Health claims**

→ Provisions on nutrition and health claims in order to ensure the effective functioning of the internal market whilst providing a high level of consumer protection.

→ Applies to nutrition and health claims made in commercial communications, whether in the labelling, presentation or advertising of foods to be delivered as such to the final consumer.

Nutrition claim: claim which states that a food has particular beneficial nutritional properties.

Health claim: claim that states that a relationship exists between a food and health.

[Regulation 1924/2006]

Certification

Standards and certification schemes in aquaculture address critical issues about **quality, environment, social and animal welfare** matters as these are increasing stakeholder concerns.

Certification schemes are **especially useful where there is information asymmetry** on safety and quality as well as sustainability issues, that is, where buyers and consumers cannot easily judge certain quality aspects of products or production processes.

The **pressure on fish farmers and processors** of farmed fish to comply with private standards depends on the market, how that market is structured, and on the type of product being sold.

Figure 7. Representative slides of Javier Ojeda's presentation (P12. APROMAR) pointing out the voluntary information that can be included in the food items and the meaning of certification for aquaculture products.

The last talk entitled *Cross-cultural consumer perception of new fish products* was given by Luis Guerrero (P3. IRTA). The twelve DIVERSIFY products from new aquaculture fish species developed and tested from a technological, physical/chemical, microbiological and sensory perspective were presented and documented. Intrinsic (sensory properties) and extrinsic characteristics (information provided) of the selected products/concepts were assessed by consumers in five countries (France, Germany, Italy, Spain and UK), thus focussing in both experiential and credence quality attributes. Results of this evaluation were presented by Luis Guerrero (**Figure 8**).

These results open a new framework of research aimed to understand the rationale behind the observed differences between countries and how they can be exploited to better design and commercialise the new products already developed. This information will be essential in order to build different business models aimed to develop launching strategies for the different tested new products in different markets.

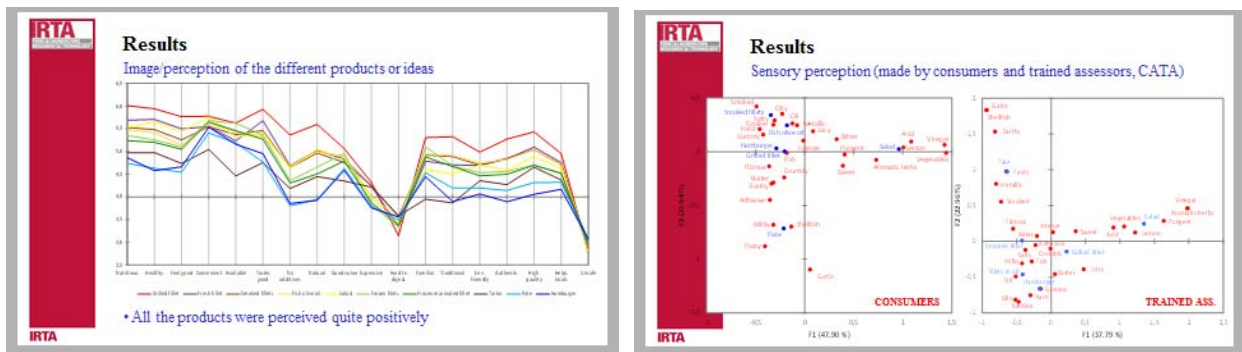


Figure 8. Representative slides of Luis Guerrero’s presentation (P3. IRTA) indicating the image perception of the different products developed in the project (left) and the difference in sensory perception of the products between consumers and trained panelists (right).

Once the presentations were finished, all the speakers joined together at the podium to start the Debate “Consumer attitude to diversification in aquaculture fish products: trust of consumers in aquaculture products, sustainability and health-related behaviour”. The debate was moderated by Marija Banovic from MAPP (P11. AU). In addition to the 6 speakers, two more attendees were included in the debate panel: Birgit Schmidt-Puckhaber, Aquaculture Responsible of the Fachzentrum Landwirtschaft, (German Agricultural Society (DLG)) and Machiel Reinders from Wageningen University (P6. DLO).

The debate was very stimulating with a great participation of all the members of the audience. After a short introduction by Maria Banovic (P11.AU) (**Figure 9**), Paul van der Heijden from Mature Development (WTC The Hague, The Netherlands) asked for the opinion of the panelists with regard to the inclusion of the high digestibility of fish products in the product label, as a promotion characteristic of the product. He found very important to include specific information about all the “goodies” of fish consumption. Luis Guerrero answered that although it is an attractive characteristic, the high digestibility could be associated to a short satiation time so a hunger feeling will appear shortly and this may not be such a great characteristic to be highlighted. On the other hand, Maria Banovic pointed out that this could be an attractive issue for the consumer sector concerned about their healthy feeding habits.



Figure 9. Debate panelists during the discussion on the consumer attitude towards diversification in aquaculture fish products.



Mr Florian Bauman, from Frozen Fish International (Iglo) started a discussion on the price stability and competition between wild and farmed fish. Yvonne Feucht from Thünen-Institute for Market Research and Birgitte Schmidt-Puckhaber commented on the relative importance of the fish origin for most of the consumers and the importance of having a story, an argument to support the buy of new fish products. This is especially important for the big buyers. Matthias Keller (P34. BVFi) commented on the examples of “nice stories” such as tilapia and urban farming but this niche markets are not pointing to most of the consumers; for this, fish products need to start in the Horeca sector and from there, big buyers (hypermarkets, supermarkets ...) will follow. Some important aspects such as the relevance of an appropriate marketing campaign were highlighted and the salmon success story was specially commented. Some statements regarding the overload of information and choice that consumers have in the supermarkets were also discussed and some of the attendees agreed that in order to bring a new fish product to the market, the starting point should be the consumer, who will create the demand and the production technology will follow. Guus Pastor from the Dutch Fish Processors and Traders Federation (Rijswijk, The Netherlands) pointed out the need to have big volumes available for the big players, which could be a limitation for the new aquaculture fish species to reach the market. Javier Ojeda (P12. Apromar) added that the amount of environmental and administrative regulations existing in the EU also make the expansion of the aquaculture industry within the EU difficult. Some further comments on the lower price of internet sales, the probable decrease of fish availability from third countries and the impact of television cooking shows on consumer’s attitude promoted quite lively discussions with special intervention of Jürgen Pauly pointing out how the salmon success has been achieved by mass production to decrease production costs.

After the debate, all the attendees of the meeting were invited to a degustation of two fish products developed within DIVERSIFY workpackages: grey mullet in olive oil, elaborated by CTAQUA (P18) and fish pâté (pikeperch), elaborated by IRTA (P3) (**Figure 10**).



Figure 10. Different moments of the degustation event of the fish products from DIVERSIFY: cans contained the fish pâté and sliced bread was offered for the tasting; grey mullet in olive oil was offered as part of a salad dish (left image).

As a conclusion, it can be stated that the 1st Promotional Workshop in Bremen was a very adequate forum to present and discuss the results of the project research on product development, consumer tests and attitude to new fish products, market needs and market strategies needed to successfully introduce DIVERSIFY fish products into the EU fish market.



Deviations: The deliverable is submitted 8 months later than anticipated in the DOW. The month included in the DOW was month 37 (December 2016), however according to the partner associations of DIVERSIFY, it was not a good moment since all the fish and aquaculture industry (producers, retailers, processors, etc...) would be fully dedicated to the sales during the Christmas period. The month of May was selected by the industry representatives in the DIVERSIFY consortium as a more appropriated date to organize the Promotional Workshop.



Co-funded by the Seventh
Framework Programme
of the European Union





ANNEX I



LIST OF ATTENDEES: 1ST PROMOTIONAL WORKSHOP
Project DIVERSIFY 24. May 2017

NAME	COMPANY/AUTHORITY
Arnd Diederichsen	Flamingo Food Food GmbH & Co. KG, Bremerhaven
Birgit Schmidt-Puckhaber	Deutsche Landwirtschafts-Gesellschaft (DLG)
Dietmar Hoffmann	Nordsee GmbH, Bremerhaven
Florian Bauman	Frozen Fish International (Iglo)
Gerhard Martin	Ministry of Agriculture and the Environment of the State of Mecklenburg-Vorpommern
Guus Pastoor	Visfederatie - Dutch Fish Processors and Traders Federation, Rijswijk, -The Netherlands
Javier Ojeda	APROMAR - Asociación Empresarial de Acuicultura de España, Chiclana
Jürgen Pauly	Globus SB-Warenhaus Holding GmbH & Co. KG, St. Wendel
Kai Wätjen	Messe Bremen, Bremen
Konstanze Behrmann	Freie Hansestadt Bremen Landesuntersuchungsamt, Bremen (State Veterinary Office)
Luis Guerrero	IRTA - Recerca i Tecnologia Agroalimentàries, Monells
Maarten Fritz	Mature Development BV. The Hague. AISP
Machiel Reinders	Wageningen University & Research, Wageningen
Marija Banovic	MAPP Centre – Research on Value Creation in the Food Sector, Aarhus University
Matthias Keller	Bundesverband der deutschen Fischindustrie und des Fischgroßhandels e.V. (BVFfi)
Paul van der Heijden	Mature Development BV. The Hague. AISP
Peter Koch-Bodes	F. L. Bodes, Bremen
Rene Stahlhofen	Royal Greenland Vertriebs GmbH, Bremen
Rocio Robles	Centro Tecnológico de la Acuicultura (CTAQUA), Cádiz
Sabine Wedell	Messe Bremen, Bremen
Sebastian Gregorius	Fischereihafen-Betriebsgesellschaft mbH (FBG), Bremerhaven
Ute Schröder	Max Rubner-Institut (MRI), Hamburg
Yvonne Feucht	Thünen-Institut für Marktanalyse, Braunschweig (Thünen-Institute for market research)