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## **The UK seafood market: where does longline-caught fish fit in?**

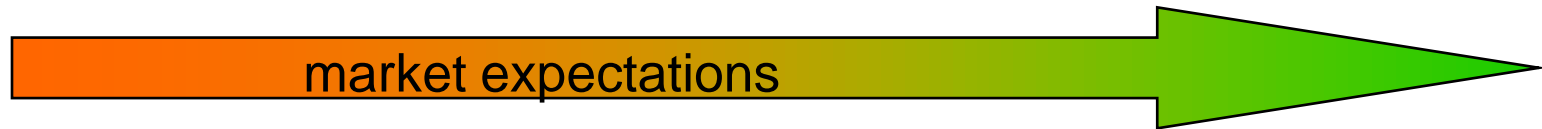
*supporting the seafood industry for a sustainable, profitable future*





- greater share
- value added
- better price

# changing times



# The magic 'S' word

How many consumers know about sustainability?



# 75%

of consumers are familiar with sustainability in regards to food

How many act on this knowledge?

# 22%

think more and change the products they purchase



# Who wants sustainable seafood?

- Seafood Choices Alliance: 75-80%
- consumers who act: ~10%

## MSC recognition?

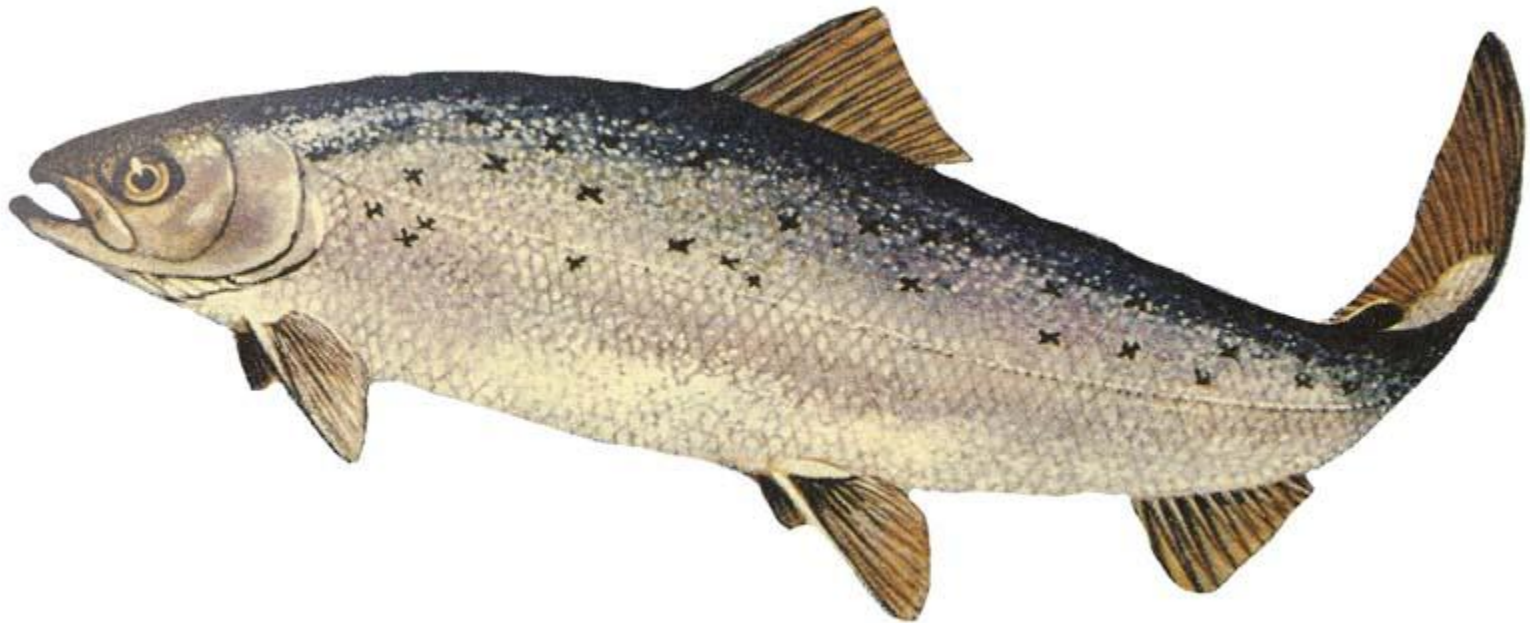


**Marine Stewardship Council**  
Certified sustainable seafood

- recent MSC claim: 25%
- reality: ~10%



# Salmon?



# Line-caught?



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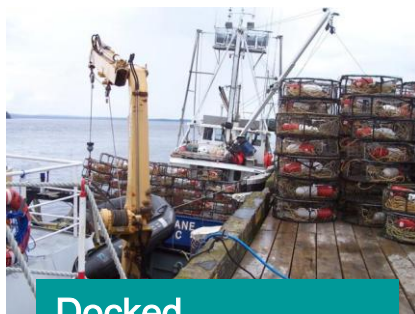
# line-caught?



# what does the chilled supply chain look like for consumers?



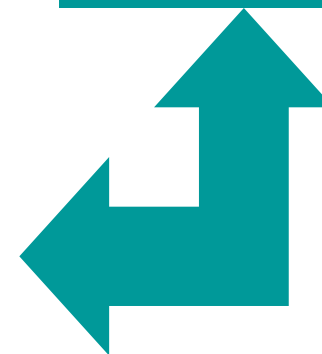
Caught at sea



Docked



Sent to store & filleted



In-store

“I think it just comes off the boat and goes straight to the store in refrigerated lorries ”

“When you think about it, how does the overseas fish get here fresh?”

- When prompted to think about the ‘fresh’ supply chain, respondents got very confused and concerned

# lack of awareness of the supply chain



# where do consumers place their trust?

*I don't understand  
what I could do.*



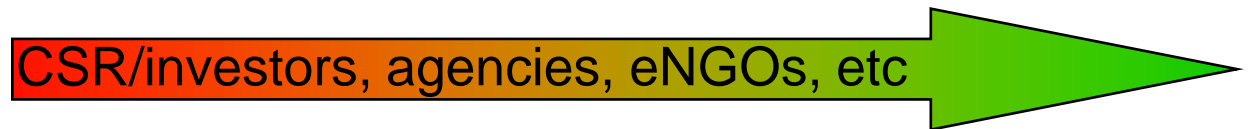
*The  
supermarkets  
must check  
these things*

*Surely it  
wouldn't be on  
the shelf if it  
wasn't ok to  
buy*

*Why should I worry  
about it?*



# changing times



So, who is in the driving seat?  
- the large retailers



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# what do they want?

- value for money for consumers  
(= low prices & margins)
- increasingly high product specification
- maximum shelf life to reduce waste
- certification and supply chain audit
- complete traceability

***All as conditions of supply***



# - and what do you offer?

- niche product
- top quality
- low bycatch and discards
- low environmental impact
- low energy use

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**do you? can you prove it?**



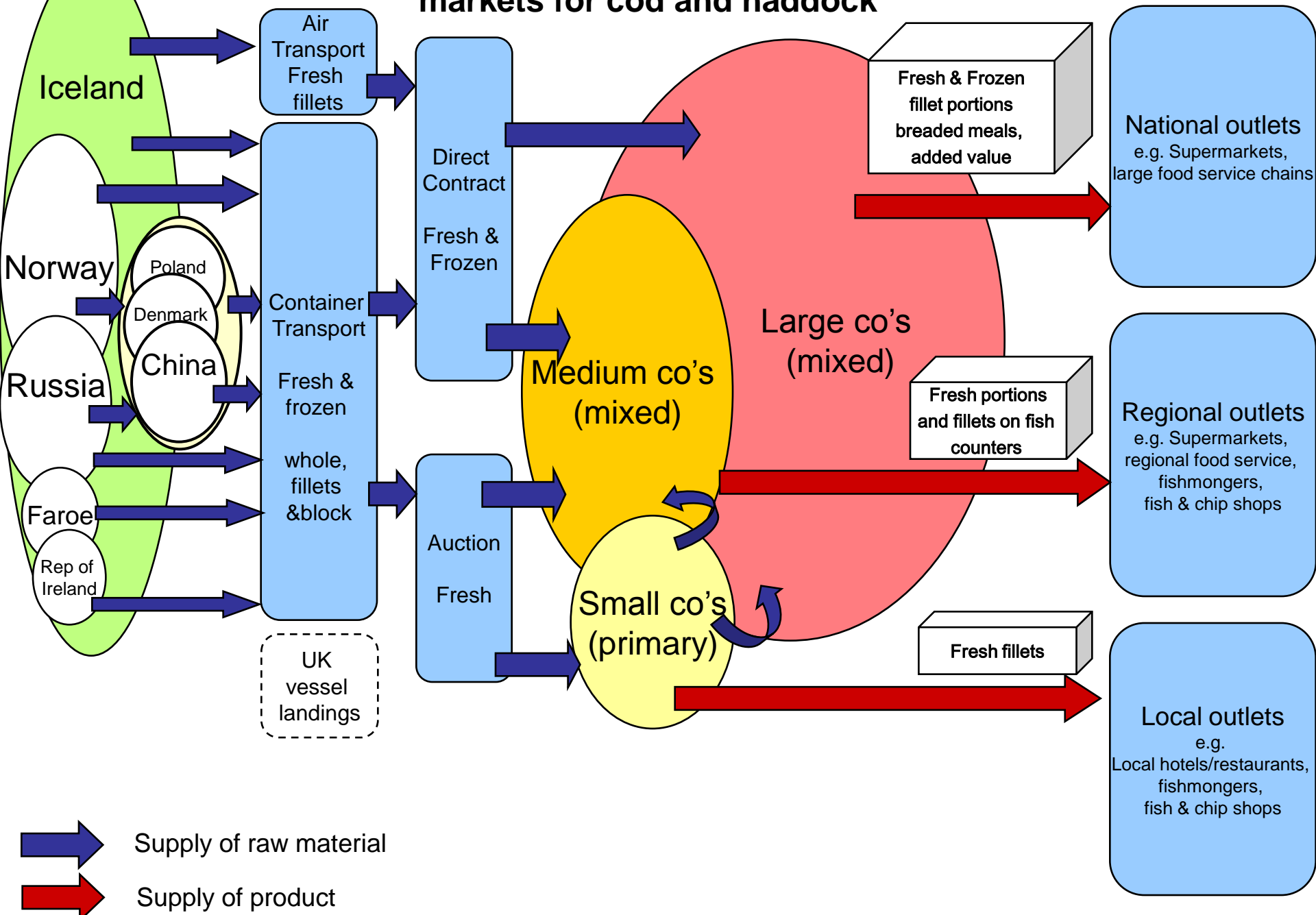
# threats to reputation & market strength

- niche product
  - for how long?
  - demand is finite
  - what if supply increases?
- top quality
- low bycatch and discards
- low environmental impact
- low energy use

# threats to reputation & market strength

- niche product
- top quality
  - handling and iceing
  - temperature & time records (shelf life)
  - **full** traceability
  - complex supply chain, feature fishermen
- low bycatch and discards
- low environmental impact
- low energy use

# Hull / Grimsby region – import supply routes and markets for cod and haddock



# threats to reputation & market strength

- niche product
- top quality
- low bycatch and discards
  - need to benchmark?
  - agree protocols for birds and turtles
  - keep records
- low environmental impact
- low energy use

# threats to reputation & market strength

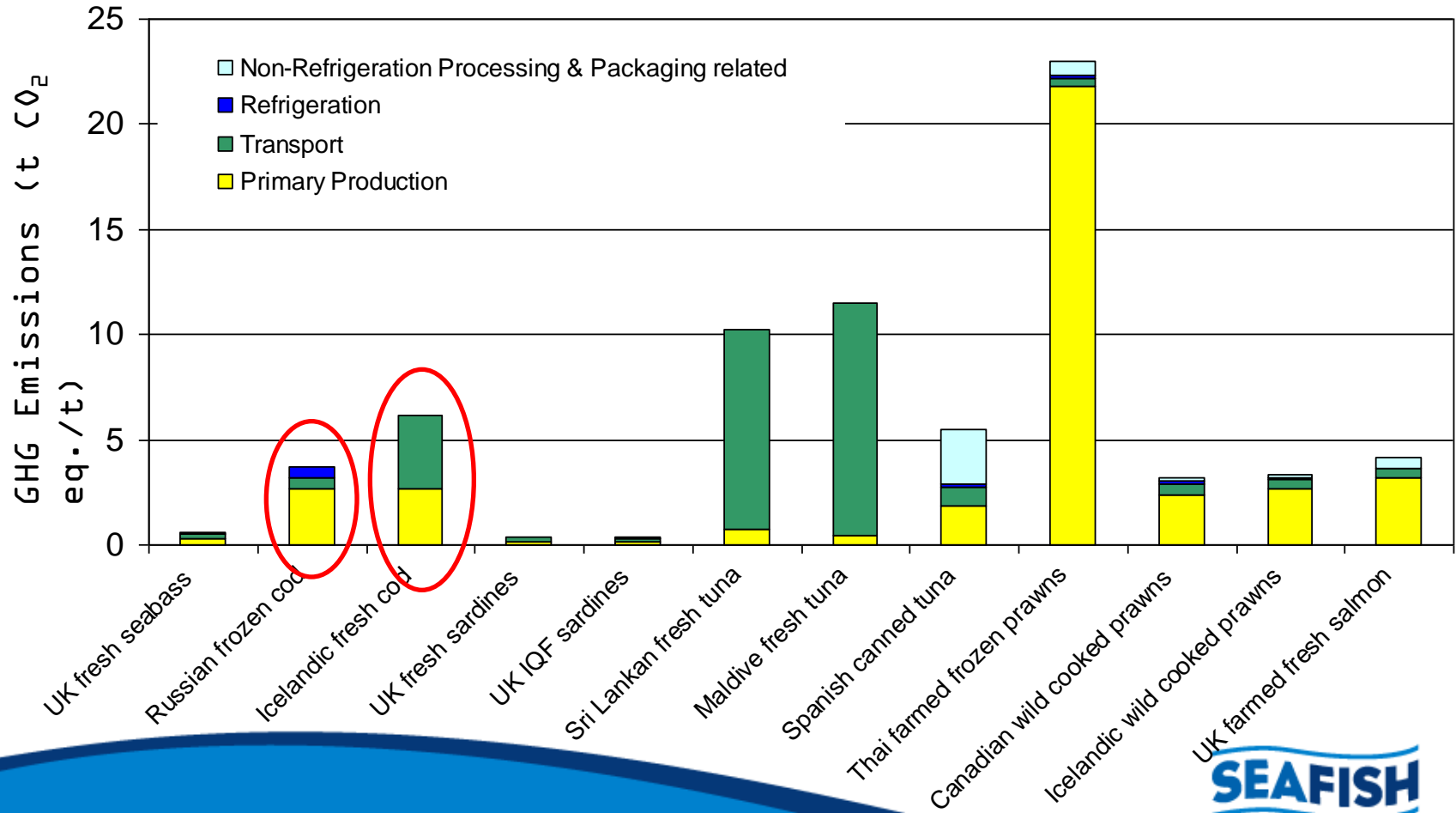
- niche product
- top quality
- low bycatch and discards
- low environmental impact
  - ? check
- low energy use

# threats to reputation & market strength

- niche product
- top quality
- low bycatch and discards
- low environmental impact
- low energy use
  - not just diesel
  - full life cycle analysis
  - processing & transport
  - bait



# typical supply chains to the UK...



# threats to reputation & market strength

- niche product
- top quality
- low bycatch and discards
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- low energy use

# conclusions

- currently enjoy strong position – work together to maintain it
- focus on quality – record it, demonstrate it
- agree handling protocols
- adopt conservation protocols
- increase retail shelf life
- niche identity – co-operate and use smart marketing
- improve traceability

# conclusions

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***do not be complacent!***