

# Generating demand: targeted, focused and responsive

North East Scotland Fisheries Development Partnership  
18 February 2022

Karen Galloway  
Head of Retail





# Ambition 2030 – our action plan

Four key themes

- market development
- innovation
- people and skills
- supply chain integrity







# Building our knowledge base in a changing world

THE  
KNOWLEDGE  
BANK

Delivered by  
Scotland Food & Drink  
Partnership

The Knowledge Bank provides us with a huge resource to help us understand and respond to the needs of the market.

Some of the key things we have learned in the last year which shape our activities.

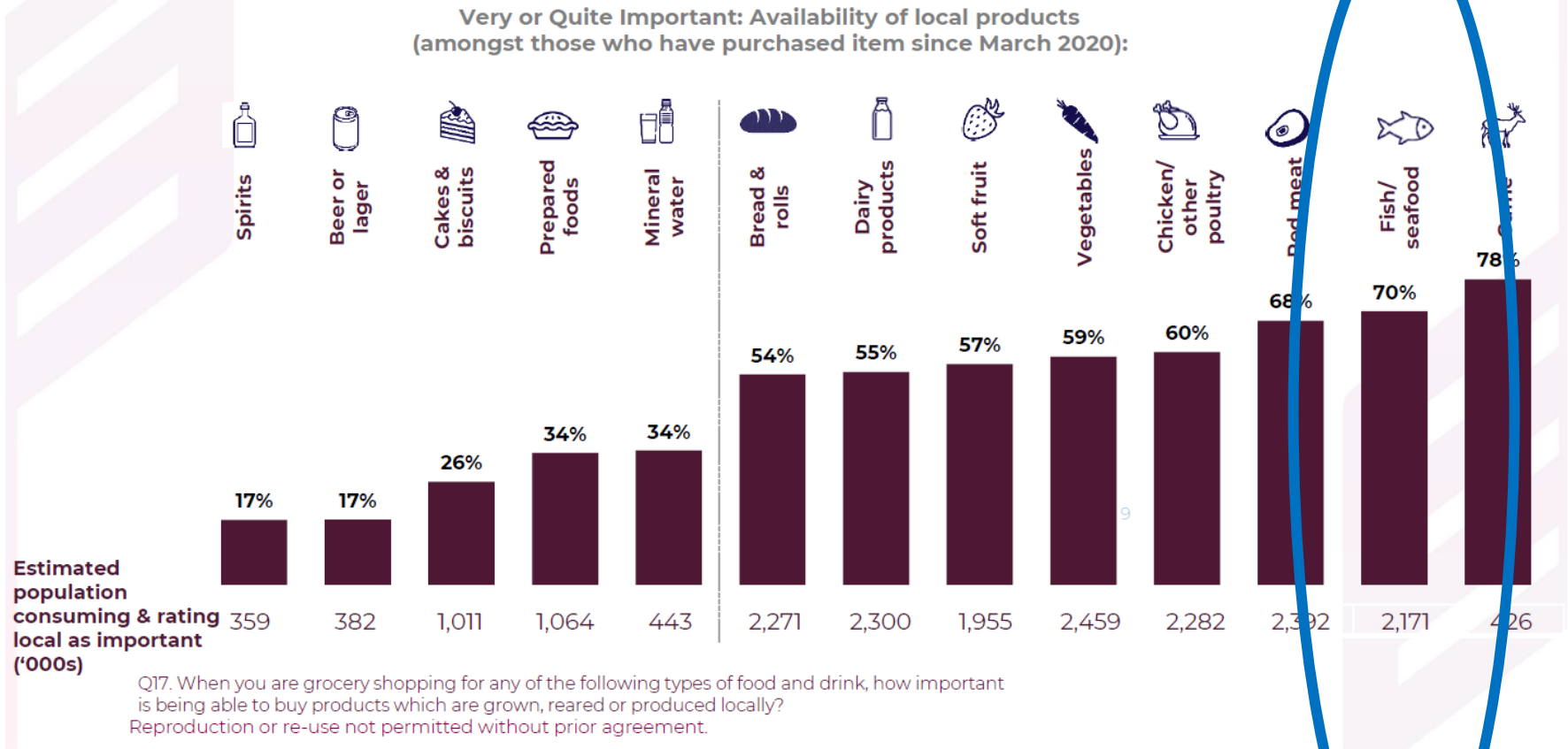


Seafood  
from Scotland

# 70% of Scottish consumers rate 'local' as important when purchasing seafood

## Importance of local is greater for fresh produce categories e.g. game

Though 359k Scots feel that availability of local spirits is important

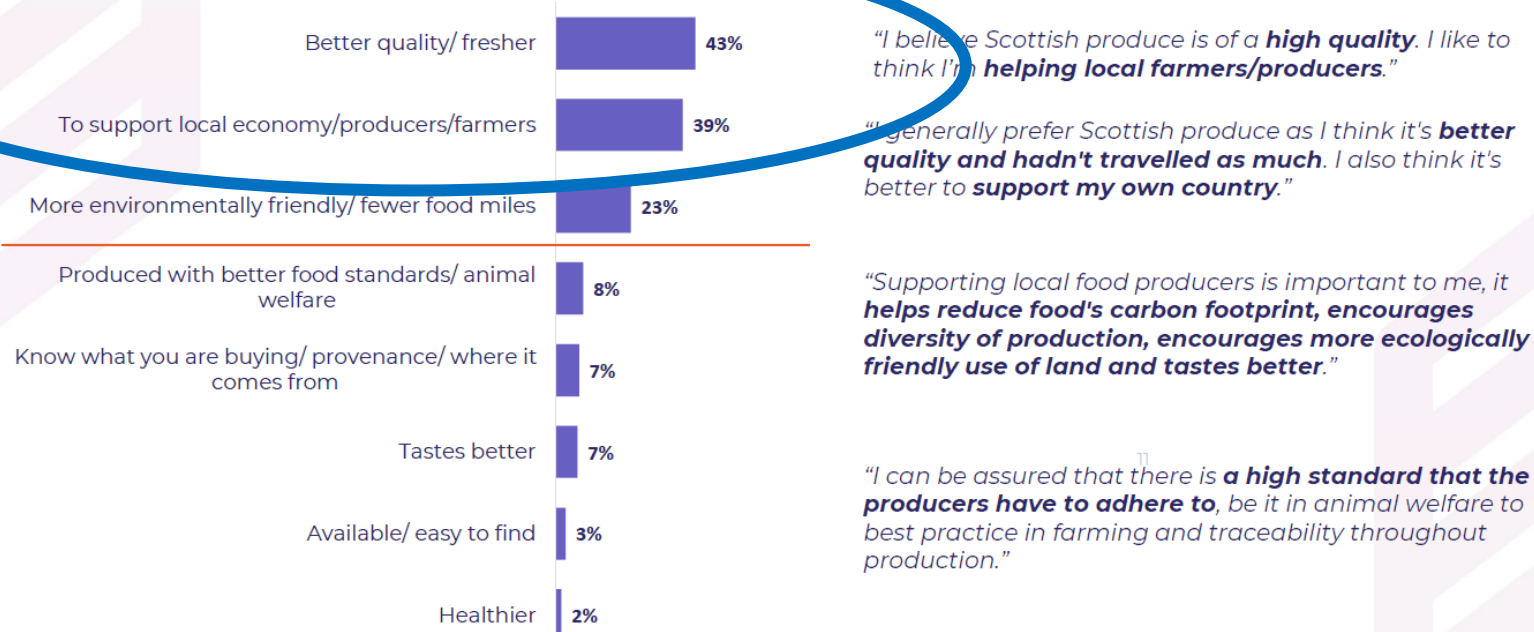


# Key reasons for buying local include freshness and impact on local economies

## Supporting local continues to be important for a number of reasons...

Product quality, supporting local businesses and the environment are all key

### Why it is important to buy local food and drink



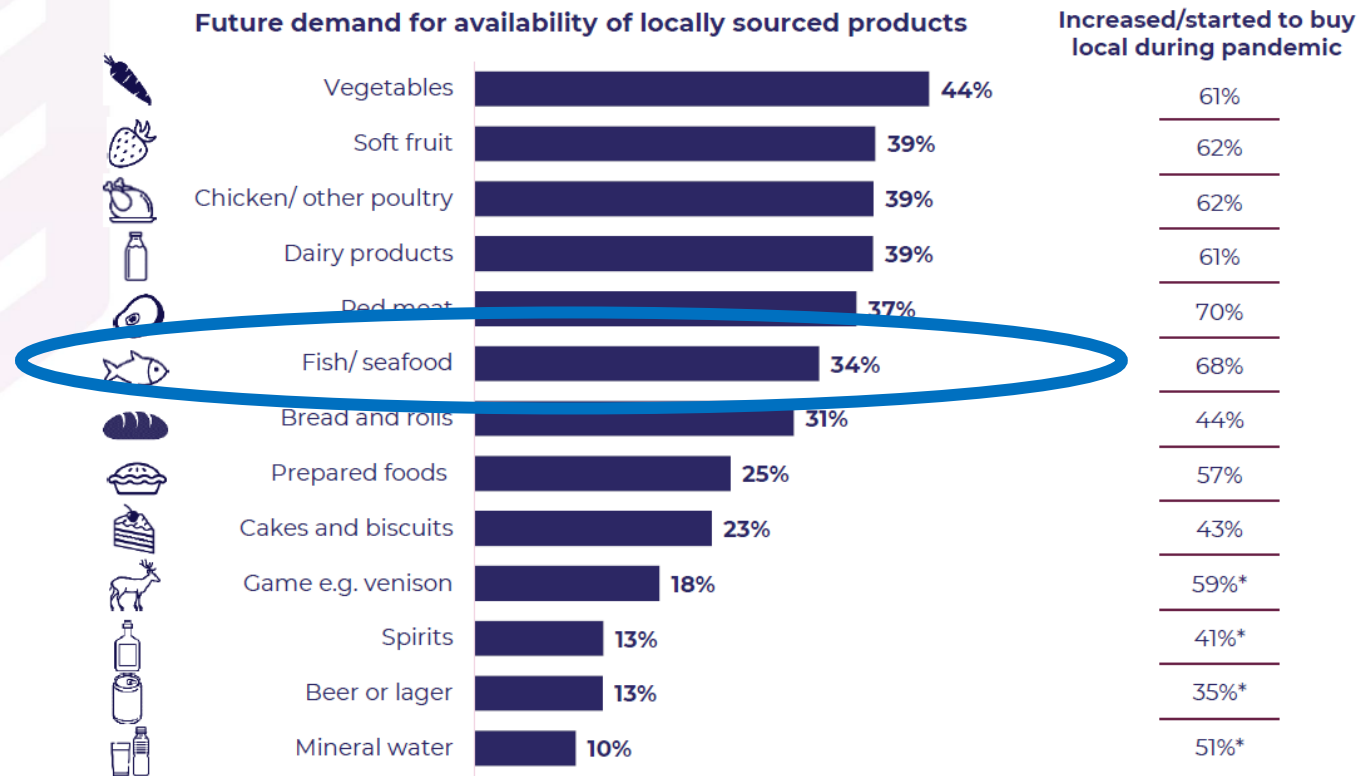
Q18a) You stated that it is important to you that the following types of food and drink are local. Why is that?

Reproduction or re-use not permitted without prior agreement.



# Over a third of Scottish consumers expect to buy more local seafood in the future and 6 in 10 expect to purchase from a local fishmonger

## Demand for more locally sourced food and drink to be available in future



\* Note sample <50, treat result as indicative

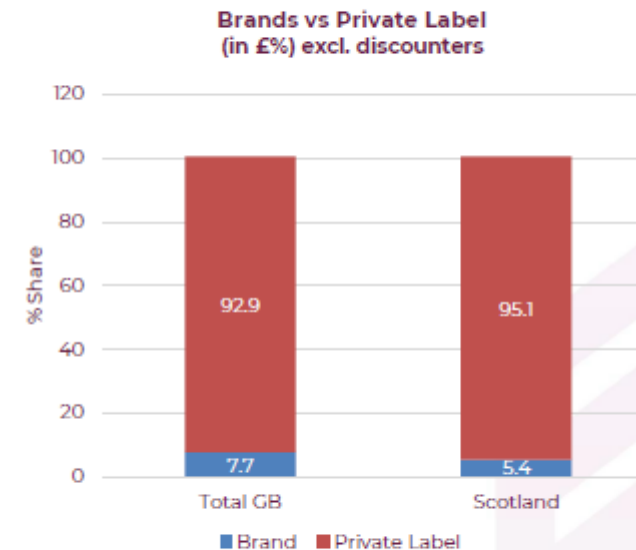
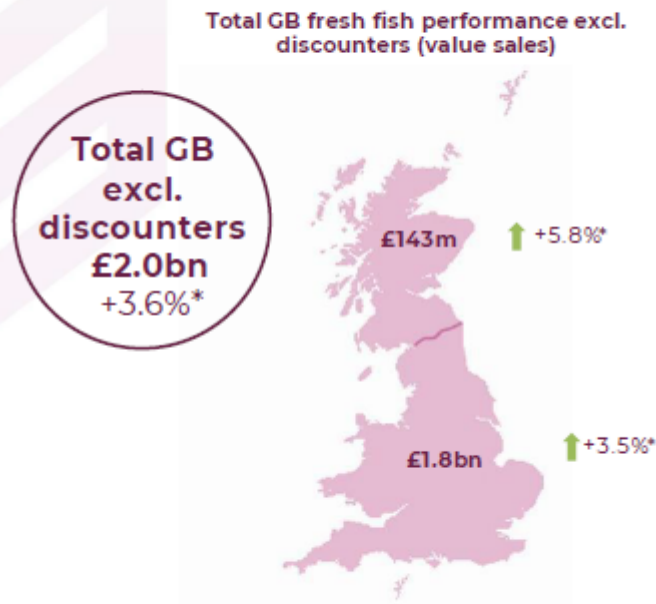
Q23. Which, if any, of the following types of locally produced food and drink would you like to see available to buy more often than before?

Reproduction or re-use not permitted without prior agreement.



# Seafood purchasing in Scotland is growing more strongly but reliant on on-label making impacts challenging

Excluding discounters, the market in Scotland is buoyant with sales up 5.8%. Own label is significantly strong within this market



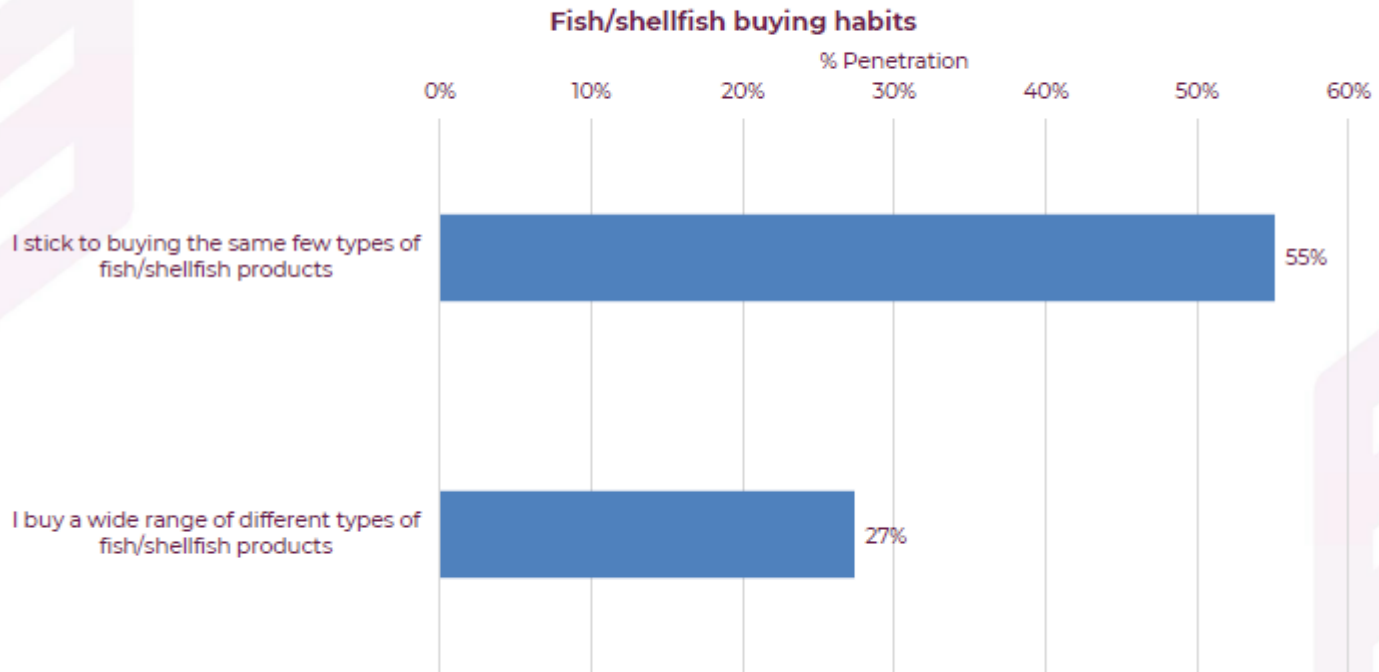
\*Year-on-Year %Change

Source: Nielsen, Total GB Total Coverage, 52 weeks – w/e 20 November 2021; Note: Data reproduction or re-use is not permitted



# But it's still all about the top 5 meaning it's harder for new species to break through

**GB consumers tend to be conservative when buying fish** which highlights the difficulty of introducing consumers to new species.



Source: Mintel - Fish and Shellfish – UK – August 2020. Note: Data reproduction or re-use is not permitted.





# International market opportunities in health and wellness



# 58%

of consumers now say they are  
**"seeking products that proactively improve**



While globally, 'green' credentials are becoming a must have

# People want to shop green – what can brands and retailers do to help them?

Lots of consumers want to shop sustainably, but do those intentions actually translate into real changes in purchasing behaviour?

We've all been there; hearing about a new environmentally friendly choice that sounds marvellous and vowing to switch. But when it comes down to it, we revert to habit and carry on buying the more familiar, cheaper, easier option. Mass behaviour change is hard to achieve and maintain. Really hard. So what can retailers do to help shoppers stick with their green resolutions?



# Different market opportunity timescales

Short-term opportunities can be found in Asia and Middle east, while opportunities in UK and North America are long-term investments

|               | Trends scored Green (growth opportunity)   | Opportunity  | Window of opportunity for new entrants |
|---------------|--|--|--|
| UK            |   | Convenient high-protein low sugar fish snacks – innovative formats beyond “jerky” – with good taste & texture (which is still one of the barriers for this segment growth) and sustainability messages | 3-4 years                              |
| North America |    | Convenient high-protein low sugar fish snacks – innovative formats beyond “jerky” – with good taste & texture (which is still one of the barriers for this segment growth) and sustainability messages | 2-3 years                              |
| Middle East   |     | Provenance justifies premium quality – opportunity to explore emerging digital channels  | 1-3 years                              |
| Asia          |     | Provenance + high protein + snack products = premium products with higher quality<br><br>Provenance justifies premium quality – opportunity for exclusive products on established online retailers     | 1-3 years<br><br>1-2 years             |

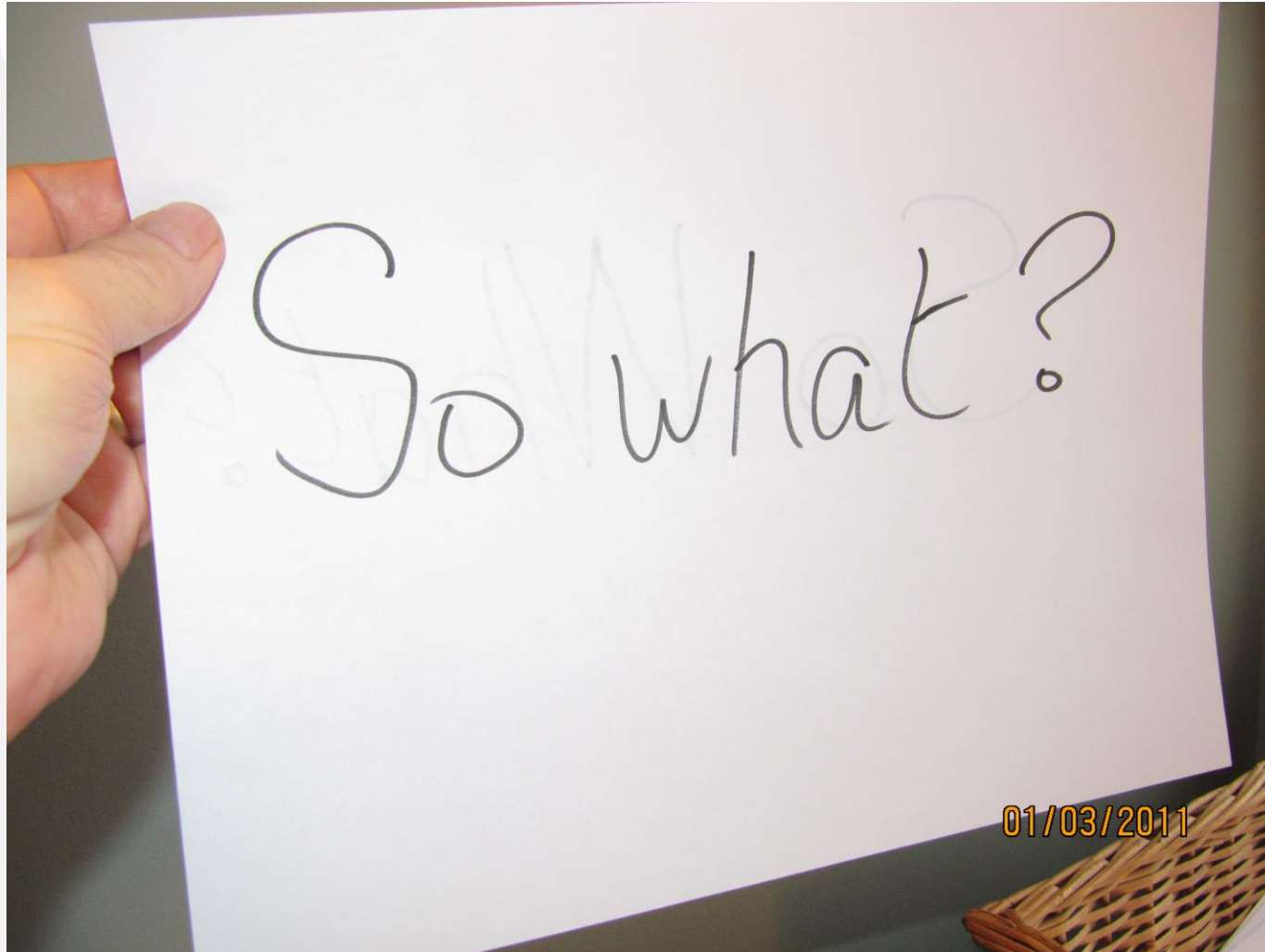
Reproduction or re-use not permitted without prior agreement.





Overlay market trends with industry needs and availability  
via our partnership approach





[This Photo](#) by Unknown Author is licensed under [CC BY-SA-NC](#)

# Building activity based on what we know, industry strategies and species availability

International market development:

Europe  
USA & Canada  
Middle East  
Asia  
Emerging Markets

Expos and shows:

Gulfood  
SENA  
SEG

Tourism, festivals, local events, education

Thought leadership

Retail: independents and multiples

Building capability



Seafood  
from Scotland



**What we do is driven by what is available.**

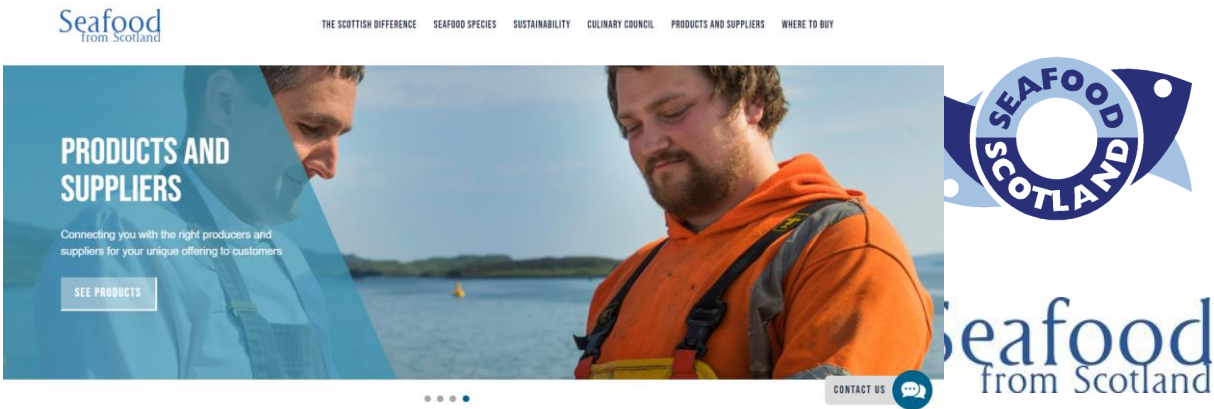
**We take an agile and adaptive approach to all our work programmes.**

**We build strong relationships with industry to ensure that we can deliver for their needs.**

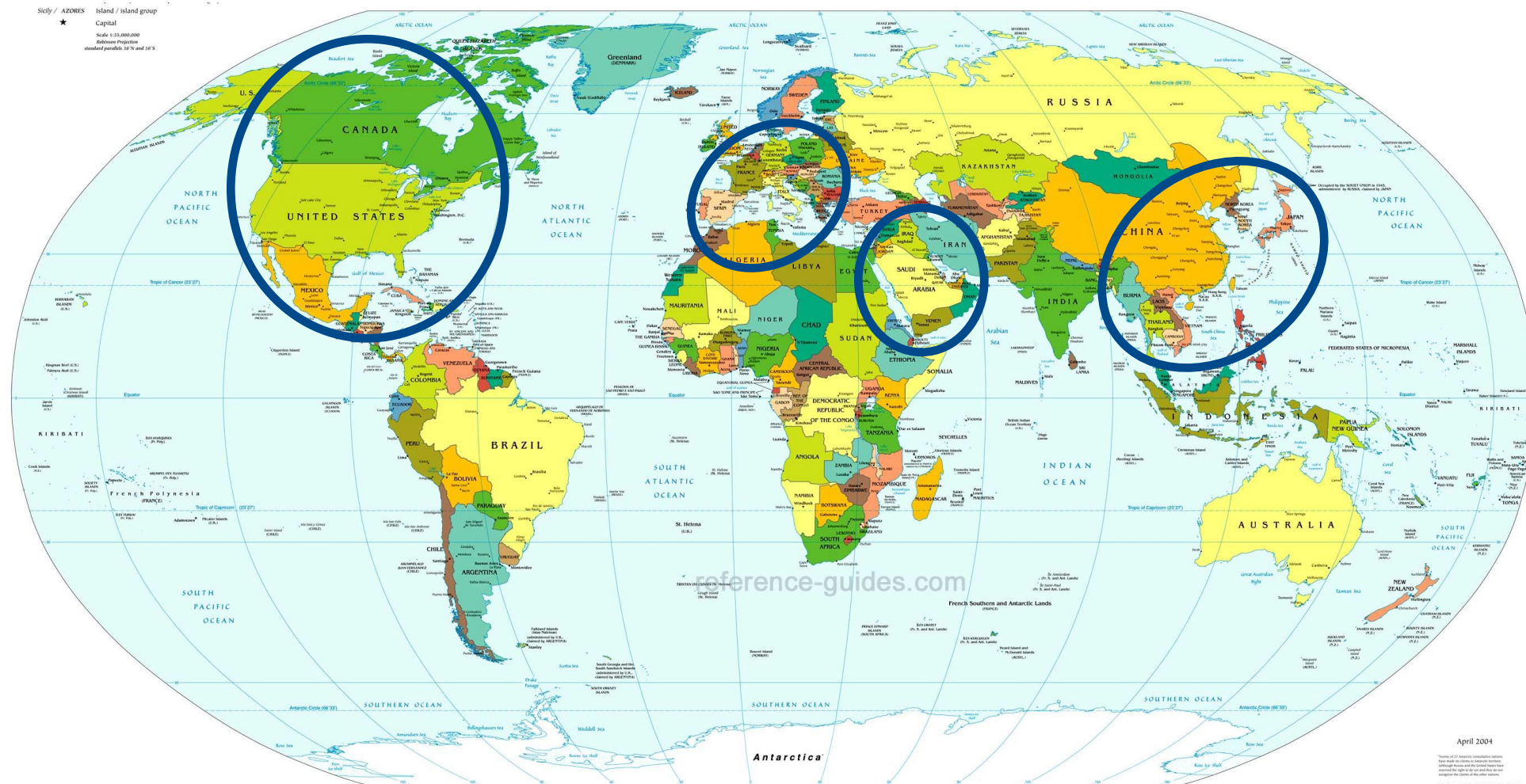


**Seafood**  
from Scotland

# International events re-start in 2022



# A world of opportunities



This Photo by Unknown Author is licensed under [CC BY-SA](#)





## 2022 Seafood Scotland Masterclasses

Join us online for a new series of masterclasses designed for fishmongers.

Covering topics such as how to prepare and sell some of our less well known species. social media hints and tips and adding value with butters, cakes and pies.



4pm, Every Wednesday in March 2022

[www.seafoodscotland.org](http://www.seafoodscotland.org)  
[info@seafoodscotland.org](mailto:info@seafoodscotland.org)

Seafood  
from Scotland

*Open masterclasses featuring less well known species such as Blue Ling, Saithe, Witch, Megrim.*

## Beyond the boat: Scottish Seafood Tourism 2022



*Driving opportunities for business  
Diversification through coached planning and implementation.  
Giving visitors genuine seafood experiences across Scotland*



*Driving seafood from Scotland in independent retail across the UK.*









# Seafood from Scotland: premium seafood

To maximise the opportunities presented we need to reposition our seafood in the 'premium-plus' category.

This is a long term strategy:

- Infrastructure, labour and supply chain integrity
- Building industry credentials through assurances, accreditations and certifications:
- Developing strong and consistent market facing activities in key markets
- Building on policy initiatives such as Good Food Nation & Local Sourcing



Seafood  
from Scotland





[Karen.Galloway@seafoodscotland.org](mailto:Karen.Galloway@seafoodscotland.org)

Mobile: +44 (0) 7966 393973



Seafood  
from Scotland



# Supply chain initiatives

North East Scotland Fisheries Development Partnership

18 February 2022

Donna Fordyce  
Chief Executive

Karen Galloway  
Head of Retail





# Ambition 2030 – our action plan

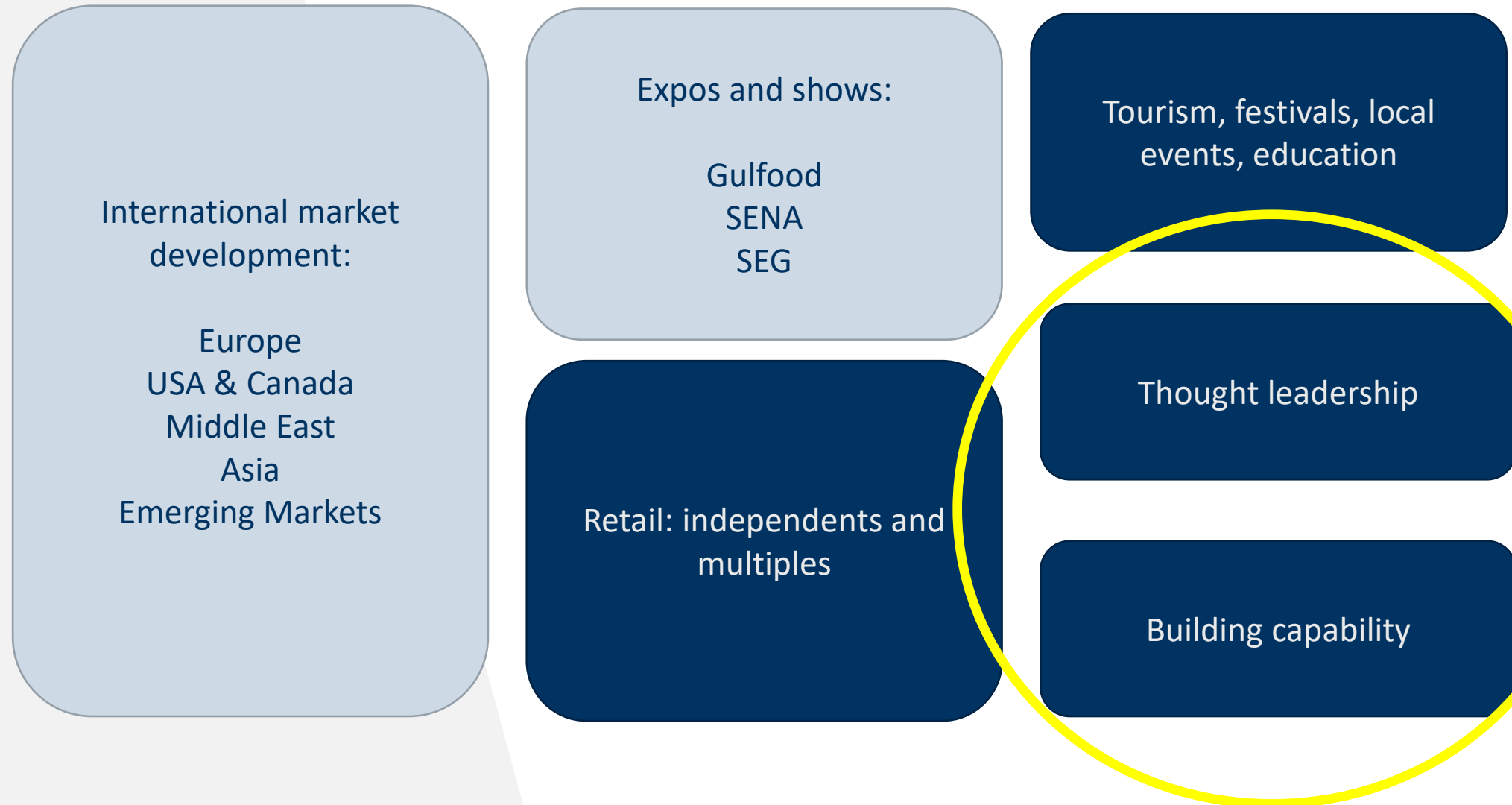
Four key themes

- market development
- innovation
- people and skills
- supply chain integrity

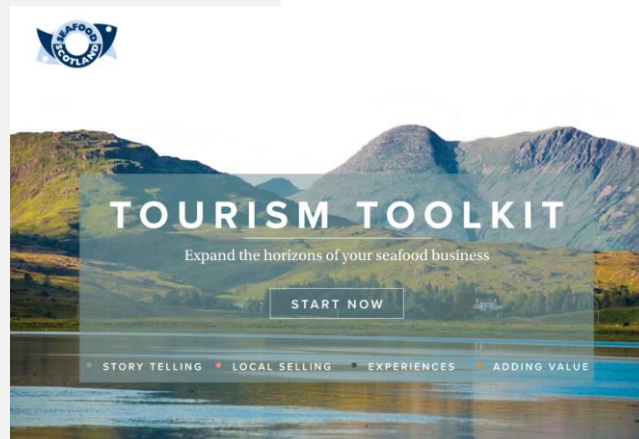




# Agile and adaptive programmes



# Thought leadership in 2021

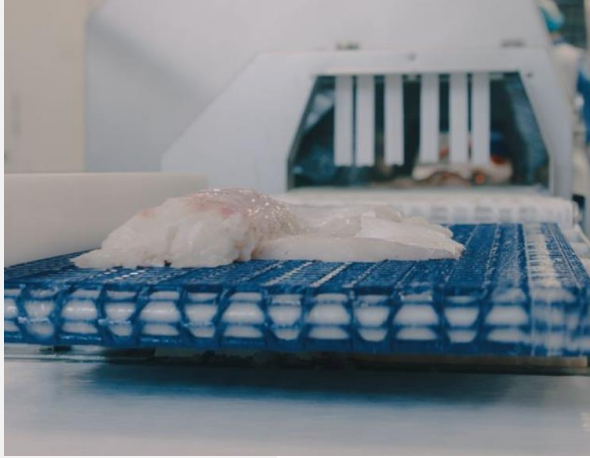


# From thought leadership to working with industry to improve the integrity and resilience of the supply chain





# Driving forward: building agility and adaptiveness



**Adoption of automation**



**Encouraging collaboration**

**Skills and capability building**



**Future Leaders**







Seafood  
from Scotland