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Market trends of seafood products under international constraints: contractualisation, marketing strategies and new behaviours

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Abstract :

In the developed countries, especially in the European Union, demand for seafood products has increased very quickly (faster than that of meat products). This growth may be explained by the recurring problems of animal health impacts on other products (bovine spongiform encephalopathy (BSE), avian influenza (bird flu)...) and to the impacts of the environmental problems (dioxins...) which are less prevalent in seafood products. In addition, seafood products profit from an increasingly positive image positioned on the axis of nutrition- health.

The enhancement of the markets is influenced more and more by the retailing channel (hyper and supermarkets). Indeed, France profits from being a pioneer in retailing, (more than 70% of the seafood market is through retailers) who can be seen as axis of development with other sectors and in other countries.

To satisfy the demand, the national platforms of the retailers rely upon imported products to supplement their supplies from local fishermen and fish farmers. These local actors must adapt to the constraints imposed by the platforms, which constitutes a major innovation in the contractual relationship with the hyper and supermarket stores. The international context weighs heavily in the determination of these constraints.

This paper deals with this framework of the new forms of contractualisation between the actors imposed by the evolution of the international context. It also describes the implications in term of setting in market and marketing strategies. Lastly, it takes into account the emergence characteristics of new food buying behaviours.

Key words: seafood products, contractualisation, price, sale promotions, marketing, behaviours

Introduction

For fifteen years the French market for seafood products has changed dramatically. In 1990 the average consumption of seafood products was 27.3 kg/per capita/year; by 2004 consumption had risen to 35.1 kg/per capita/year. This increase in demand (with a growth rate higher than + 2% a year which is the highest of all livestock products) has been achieved despite a continuous rise in prices for ten years at national and international levels, where price rises have been accelerating. At the national level, domestic seafood supply has remained relatively constant around 850,000 tonnes per year. Increased demand has had to be satisfied through imports with a significant expansion from one million tonnes in 1990 to 1.9 million tonnes in 2005. Moreover products resulting from the aquaculture currently account for 25% of the French seafood market. At the international level the causes are the same, but with a larger share from aquaculture which contributes some 42% of supplies

In addition, if we consider only the fresh fish caught by the French fishers, which constitutes the principal source of provisioning for this type of products for the national commercial system, the production is very diverse (more than 60 fish species marketed), very fragmented (nearly 1500 points of unloading and 41 auctions) and thus extremely complex. The structure of the production and the characteristics of sea fish products make it very difficult, if not impossible, to guarantee regular supply of quantity and price. In addition to inherent variations in supply there has been change in demand with growth in the market and its structure. In particular the evolution of retail channels has been notable. Hypermarkets and supermarkets have expanded their share of fresh products from less than 50% of fresh fish in 1990 to more than 70% currently. This expansion has led to greater fragility and decline in the other residual retail sectors. **sedentary retail trade (11%) or not sedentary (15%).**

Thus within a relatively short period of time there has been a quite dramatic shift in the concentration and subsequent balance of power within the fish marketing chain. However with a fragmented supply base producers retain some negotiation powers which helps explain why, contrary to the other seafood products, the price of the fresh products increase less quickly. It is thus interesting to examine the consequences of such a transformation, to locate the place of each actor and to understand the changes in term of contractual relationships.

With this intention a series of interviews was undertaken with the actors in the fish marketing chain concentrating on the Brittany area as this represents around half of French fishing, in terms of landings?. The objective was to analyze the operational policies related with the merchandising. They were carried out during a six year period (1998- 2004) along the Manche (English Channel) coast from Boulogne sur Mer to Brest; but with greatest concentration throughout Brittany, as the premier fishing region in France. The sample consisted of

- 245 owner- fishermen and fishmongers ;
- 73 super and hypermarket stores ;
- 12 managers of different central offices.

The main results, concerning the analysis of the provisioning policies and the various criteria which make a policy marketing and commercial (freshness, price, promotions), show a heterogeneity of the signs according to whether they are integrated or independent, centralized or decentralized (Gouin, Boude, Charles 2006). For the analysis of the evolutions of the forms of coordination between the actors of the chain value, it was interesting to describe what conducts to new forms of contractualisation. Initially one describes the evolution of the forms of contractualisation (I). Then one tries to explain the evolution of the terms of the agreements while being based on the analysis of the trend of costs of transaction (II). Finally the evolution of new strategic induces new commercial policies (III).

1. Contract types and evolution

While explicit agreements are made between fishermen, wholesalers and referencing on the basis of the July 1996 law (law Galland rebates on invoices and uninvoiced paybacks including commercial agreements and proportional refunds) and on the new

economic regulations of May 2001, the situation is totally different for large and medium stores (GMS)¹. The contractual relations between fishermen- wholesalers and the stores are rather based on implicit, i.e., verbal agreements.

Indeed, contracts with national or regional centralised to chain of values base their pricing policies on the « forward margins » or rebates on invoices (opening of a product line and range management) and on uninvoiced « backwards margins » (also called « commercial cooperation : involvement in the group’s advertising, shelf positioning...») mainly composed of turnover proportional refunds. It is then a « reference offer » or a « target offer ».

Meanwhile, since February 2006 new agreement appears between fishermen, wholesalers, fishmongers and retailers. Retailers can reduce their prices of 5% from their forward margins (law Jacob- Dutreil). Indeed, a part of the forward margins can be redistributed to the consumers (possibility of integrating the share of the financial advantages exceeding 20% into 2006 and 15% into 2007). New approaches appeared in terms of merchandising and commercial tools.

Store contracts, regardless of their management system (integrated or independent, centralised or decentralised) are based on the confidence they build up for their centralised office, with regard to quality in particular (intrinsic or extrinsic). Their pricing policy is based on the net- net or « net for all » principle, i.e., prices are fixed. For direct procurements, a word is a deed. There is no paperwork because of the very short time between the suppliers and the retail store (*table 1*). This is a « specific offer » or an « improved offer ».

Table 1 : Contractual Principles in the Retail Industry

Structures	Management	Names	Super central office	Type of offer	Central office contracts	Store contracts
<i>Integrated</i>	centralised	Carrefour	Carrefour	Targeted	Explicit	Explicit and implicit net- net or net- net- net With Promotional
		Auchan	Auchan	Targeted	Rebates	
		Casino	EMC Distribution	Targeted	And refunds	
	decentralised	Cora	Provéra France	Specific		
<i>Independent</i>	centralised	Intermarc	ITM	Referenc	And	Direct

¹ A specialised stores includes an area <120m² ; a superette is between 120 m² and 399 m² ; a supermarket is between 400m² and 2499m² ; a hypermarket is equal to or greater than 2500 m². The law Raffarin of July 1996 imposes on any project exceeding 300 sq metres to apply to a Commission Départementale d'Equipement Commercial (CDEC) and any project for the construction of a hypermarket above 6000 m² has to be subjected to a public inquiry.

<i>nt</i>		hé		e	commercial Cooperatio n	actions
	decentralise d	Leclerc	Lucie	Improve d		
		Système U	Lucie	Improve d		

These annual contracts (renewable even multiannual in the case of the private labels), impose constraints related to the product (hygiene and safety). They also evolve worms of the more demanding tariff conditions to the fishermen and the wholesale retailers given in cascade or based on triple Net (Net of publicity, promotion and handing- over on sales turnover) with sometimes a repairing (obligation to raise the successive handing- over at higher rates).

It is now possible to define a typology that takes into account the strategies of the various actors, their primary determinants in transactions, and thus highlighting the types of contracts and partnership arrangements. The latter are bound to develop in future.

Indeed, table 2 provides a synopsis of contractual relationships between the various actors of the fishing channel. Lines indicates the type of approach and the characteristics of contracts according to the initiating actor.

Table 2 Typology of contracts and partnership relations between the fishing industry actors in respect of valorisation efforts

Action/effort initiator	Type of quality	Type of offer	Marketing location	Contract location and type	Valorisation concept	Pricing policy
Fishermen	Higher quality	Specific offer	Specialised and non specialised stores, Independent decentralised	Explicit pre- set – Auction – non auction	Typical craft	High exclusion prices
	Quality reference	Improved offer	Specialised and non specialised	Auction - wholesalers,	Production process	Average market prices

			stores, Decentralised	Explicit pre- set		
Fishermen retailers	Quality charter	Targeted offer	Specialised and non specialised stores, Integrated, Centralised	Auction – wholesale rs, retailers	Process productio n, retailer qualificati on	Market prices
	Basic quality	Referenc e offer	Specialised and non specialised stores, Centralised	Auction – wholesale rs, retailers	Selection, Export	Market prices – insertio n prices
Retailers	Developme nt of own brands	Referenc e offer	Independe nt, Centralised	Integrated	Export	Standar d market prices
		Targeted offer	Private label (Gulf Stream, Petrel, Odysée)	Non auction, Direct	Production process	Insertio n to market prices

- When the contractual approach is initiated by fishermen, there is a true determination to develop a quality policy based on the specific or improved offer. The whole approach is based on the intrinsic quality of a product as the only source of added value. The typicality of the profession seems to be the main basis to justify high-price seafood products (selective pricing). Fishermen organise themselves by promoting the origins and peculiarities of their craft, as warranting extra-freshness and top quality. Such is the case with the « ligneurs de la pointe Bretagne » and « Bretagne Qualité Mer ». Products from that source are preferentially displayed on decentralised stores such as Leclerc or Cora or alternatively in specialised stores like fishmongers.
- When there are bilateral, contractual relationships between fishermen and retailers, the induces a "quality charter"- type targeted offer or a more basic offer of reference. Such an approach is mainly initiated by centralised, affiliated names. He is based on a mass strategy positioning on a market price. By resorting to the "quality-charter", retailers can guarantee product quality and traceability. They are thus in a position to better respond to their local

customers' expectations with the targeted offer while ensuring at the same time regular and well-organised procurement. Carrefour and with their « Filière Qualité », Casino with their approach to quality « Terre et Saveurs », Cora with their « Engagement dès l'Origine » have become standards of reference for seafood products. That bilateral relationship approach also applies to an offer of reference relaying a more on a basic quality. It enables retailers, the centralised ones in particular, to extend their basic product offer to a clientele more concerned with prices, attraction prices and promotions in particular.

- When retailers are the initiators of the contractual approach, two situations are to be considered : a reference offer or a targeted offer. With a reference offer, retailers will favour a low-price policy (insertion prices) on easy-to-cook and often basic species. A more targeted approach can also be taken by some retailers. Such is the case with Intermarché and Leclerc who have initiated a true "dedicated brand" approach at market price or at low price. The distributors' aim is to gain customers loyalty. Such is the case with Intermarché and their Pétrel, Odyssée and Gulf Stream brands, and with Leclerc and Amiral de Bretagne.

2. Evolution of the terms of agreements

A classic definition of transaction costs is “costs other than price which are incurred in trading goods and services.” Or according to the K.J. Arrow (Arrow,1964) approach they are “working costs of the economic system.”

Using Williamson's transaction determinants, the impact of actions taken to enhance the value of products (quality standards and label) can be assessed in terms of transaction.:

- Specific quality marking will reduce the uncertainty attached to fish quality and promote transaction repetition and frequency by guaranteeing that quality through specific control modalities. Quality marking therefore can be construed as an implicit or even explicit contract, with all that it implies in terms of management, follow-up and possible contractual hazards (Salanié 1994).

- Such a “contractualisation” will reduce transaction insecurity and promote exchange recurrence between the various actors. The reality of the warranties granted consumers by a quality label generates consumers’ loyalty. Conversely, irregular or inconsistent quality will be immediately sanctioned by a no renewal of purchase. That reduces potential risks of opportunistic behaviours by producers but these two elements depend on the credibility of the quality label. That credibility will be all the more reinforced as quality will be linked to production assets.

If more, placing a quality label on a specific production method e.g., line fishing, highly increases the material and human specificity of production assets. The transaction subject product owes its quality to the specific know-how required for its production.

The example of label for sea bass in Brittany is an interesting illustration for this purpose. The best sea bass are tagged on the fishing ship. The tag indicates information about the fisherman and the boat with a specific number for each sea bass. A web site give many more information about the specificity of the fishing action and allow to print a quality certificate.

By high lighting the production asset specificity as the source of product quality, this quality labelling makes it a highly specific asset, warranting sustainable added value. The more determinant the asset specificity is in achieving quality, the more difficult it would be to change activity because reconversion would be too costly in terms of lost opportunities.

This quality label therefore constitutes a very special investment and a very specific asset (Charles, Boude 2000). A label induces a durable dependency link between producers and production quality. The capital opportunity cost is thus high and is an incentive for producers to optimize their production quality so as to ensure long-term continuance of their trade.

Such a high dependency (producer- specific asset – quality) bolsters the credibility or the approach and the implicit « contractility » of the label.

According to the type of transactions, adapted governance structures will occur as frameworks for those transactions.

According to Williamson, a type of governance that is meant to last will be more efficient in that it will minimise transaction costs and aim at maximising the

profitability of the valorisation set up. In the case of coastal fishing quality markings, several hybrid and intermediate forms occur between the market and the firm. That governance will take the interactions or transactions between producers, their associate label holders and other actors of the channel into account. So the essence of the quality marking and adequate governance implementation amounts to offering producers transactional benefits. The higher the risks, the higher the transaction costs induced by market governance in comparison with other modes of governance.

More generally the research projects of quality are the result for many species of a double step :

- Steps are initiated by the fishermen them even or structures which are close for them. In general these steps evolve/move between two objectives which are either the search for a differentiation by the specificity of a quality (case of the bar of line), or the search of an increase and a harmonization of the level of quality of a whole of sinned species (case of the regional steps relating to artisanal fishery products).
- The stores (hyper and supermarkets), through their central merchandizing impose requirements of quality by the means of the schedules of conditions which are thus binding to their suppliers with the wholesale fish merchants and the fishermen.

To the plan of the costs of transaction that that induces and also systems of governance which are set up one leads to contrasted enough results :

On a side the case emblematic of the bar illustrates a strategy which leaves the producers and who is binding to all the actors of the chain of marketing because that makes it possible to obtain very high selling prices and that the whole of the chain of value is recognized in such a step. The result is that each actors of the commercial chain, not only covers the whole of its costs, but in more they release a good margin from it. That also applies to the producer who covers not only his additional costs but which derives more significant incomes from them. That can even result in a reduction in its effort of fishing which goes in the direction of a better protection of the resources.

A the reverse, the steps which lead to a certain harmonization of qualities facilitate the collecting of the benefit by the downstream of the chain of value. One notes an increased capacity of the actors of the downstream, initially the wholesale fish merchants then hyper and supermarkets to decide what corresponds to their standards of quality without the fishermen having a determining role.

Whatever the schema selected, one can note that the strategy of the fishermen is to try to profit from their efforts by having a fast return on investment and an increase in their incomes. That of the actors of the downstream (wholesale fish merchants and hyper and supermarkets) is as much as possible to collect the benefit by reducing their costs and by increasing their margins. Whereas the authorities or the collective organizations try to harmonize the regulations. One is very close to what Ronald Coase described in 1960 in connection with the analysis of the taking into account of the environmental phenomena in its famous item on the social cost (Coase, 1960)

3. Evolution of marketing strategies and commercial policies.

In the fishing sector characterised by fragmented professions, the divergence of interest of the various actors leads to difficult collective adaptation (Delreuve, 1996). The increase in the number of regional collective brands is a perfect illustration. In the end, both actions and the will to undertake characterise the sector. Yet, the difficulty consists in their implementation within the sector that is atypical of agriculture and its related food activity.

Regarding our surveys, despite everything, we can reasonably consider that there exist two possible sector strategies, the marketing and commercial tools of which constitute the major bases :

- A high- enhancement strategy, based upon extrinsic criteria for basic species ;
- A low- enhancement strategy rather based upon intrinsic criteria for noble species.

3.1. High- enhancement strategies

These strategies refer to basic species, the sale of which (at least unprocessed) doesn't really arouse interest except for connoisseurs. In order to widen the potential range of consumers, and also to establish customer loyalty, enhancement in terms of processing (fillets, steaks) and marketing has become necessary.

Regarding marketing, solutions exist in the segments of "ready to cook" (PAC) and "ready to grill" (PAG) products. Basically, these solutions rely on extrinsic qualities such as packaging (shape according to the fish, colour code...), the logo, labelling (location, fishing method, processing of the fish onboard and ashore, etc...), and the brand (proposed as follows: manufacturer brand, umbrella brand, product range brand, and product brand). At the store level, these extrinsic assets should imperatively be part of a shelf space based upon organisation methods and merchandising control (warm zone, cold zone, areas proposing the most famous brands, control ratios: yield rate, productivity rate, turnover rate...).

Finally, it is advisable to combine to these methods of marketing, some relevant consumption areas favouring the customer's situational and functional constraints (service brought by the product considering the constraints of consumption place, the time devoted to the action of consumption, as well as the consumer's living environment).

3.2. Low enhancement strategies

These strategies would rather refer to noble species from the wild: sole, turbot, brill, sea bass, and salmon. Due to their intrinsic qualities (flesh, texture...), these products belong to the top end of the range (K. Galatoire, 1999). *De facto*, their locations, freshness, the way they are caught are obvious advantages that must be exploited. Yet, in the tangible and intangible universe of the consumers, these assets are not always exploited the way they should be (appetence). Indeed for the consumer, these species are basically assimilated to a festive marketing positioning. Thus, such products are not directly aimed at the young consumers. Their prices act as a brake and even an obstacle that must be removed, at least if the professionals' intention consists in targeting these species at wider categories of consumers (20- 35 years old). The key component that would lead to the democratisation of these species seems to be the aggregation of the different actors of the industry in a common policy

combined with a more generic communication program. But you still have to give yourself the means. The many regional collective actions initiated here and there just add confusion to the consumers' mind. In the end, such steps result in a compartmentalisation of the market, and to the rapid saturation of its many "micro segments".

Among the possible enhancement possibilities, most of those referring to processing rely on its first stage: fillets, steaks, etc. As far as the commercial enhancement possibility is concerned, a logo and a brand indicated on a codified packaging (colour, shape...) seem to be imperative.

3.3 Approaches to merchandising and evolution of category management in stores

In terms of merchandising approaches and their commercial consequences on customers. The first remark that came out of the survey involved the choice of products. Half of the turnover made by fresh products presented on stalls relies on two main species : shrimps and salmon. In centralised stores, the balance of the turnover comes from « targeted offers » of imports or fish farms. Conversely, the balance of the turnover in decentralised stores comes from « specific offers » by direct procurement from fishermen or wholesalers.

The offer of fresh products in supermarkets tends to meet local clientele specifications (in primary areas) with three additional promotional actions each week. In hypermarkets, the department is rather configured at the national scale, with five promotional actions per week. In parallel, an increasing number of vacuum- wrapped products are offered as self- service to customers.

That tendency is all the more marked in those stores as retailers take full responsibility of what they sell, in application of the law of May 1998² and even more since the May 2001 new economic regulations on retailers' private label³. Confronted with this responsibility, retailers tend to pass on the service cost to their suppliers,

² Law n°98- 389 of 19 May 1998 engages the liability of retailers in case of defective products defined as « unfit to provide the level of safety that can be expected ».

³ Article 62 of law n°2001- 420 of 15 May 2001 on new Economic Regulations :

« Is considered as a product sold under a retailer's brand name a product whose characteristics were defined by the company or the group which handles its retailing and owns the brand name or trademark under which it is sold »

such as gutting, filleting, barqueting, etc... Some suppliers even support the constant procurement and shared procurement management costs.

Because of these new relationships between suppliers and retailers, product management is no longer based on product family alone and its related technology, but on all that converges on the products (trade marketing⁴) and which affects its logistics (Supply Chain Management) . Such is the case with Saupiquet, Tipiak or Kritsen.

Consumer relations now lead to the l'Efficient Consumer Response⁵ method, i.e., a policy of partnership between industrial fisheries/wholesalers and retailers to better satisfy consumers (Nestlé through their prepared dish brand name Maggi). Merchandising or shelf marketing policy is based on category management, a fundamental base of which is geo-marketing (Narvik, Paul Paulet).

Category management is defined as « a concept and process between a retailer and a supplier who can manage categories as consumer-oriented, strategic units, so as to deliver a specific value-added ». A category is a « set of products and/or services perceived by consumers as meeting their expectations. That set of products and/or services includes products and/or services that are complementary and replaceable » (Cogitore S., 2003).

Category management therefore it is a means to manage categories as commercial strategic units, used by retailers and industrialists to increase results by focusing on value-added delivery to consumers. Doing category management is trading, not only distributing (Gruen W. T., 2003).

Consumers then become the kingpin around which all trade marketing actions will be coordinated towards a categorial offer. (Compagnie Artique with Sill, Armoric traiteur, Bretagne Saumon, Capitaine Cook). Category management aims at optimising the means so as to achieve the best choice, the best implantation, the best prices and the most appropriate promotional strategies at the lowest costs, for each category.

Category management consists in combining marketing and purchasing competences. Its concept relies on four main components (Cogitore S., 2003) :

⁴ Trade marketing consists in improving category performance. The success of the method relies on the right dosage of three mix levels : choice, promotion and pricing.

⁵ Efficient consumer response is reflected by an exchange of information between suppliers and delivery processes, so as to limit stocks, shortages and handling.

- *Store by store offer management*, defining and grouping products within categories that form strategic units, individually managed within a broader retailer name policy.
- *Customer satisfaction within a purchasing logics* by arranging shopping spaces and shelves according to location-function consuming modes (sea- food delicatessen department).
- *Marketing- oriented organisation of distribution* based on the combination of retailers' various competences (purchasing, logistics, marketing, sales) to define the best store mix (Petit Navire, Saupiquet, Nestlé...).
- *Data circulation* including the data collected from the various stores, to be used later to define strategic units.

For retailers, category management is an effective means of outranking their competitors otherwise than through prices, to increase their turnover and win market shares. Its input helps managing categories and product offer store by store from a wider retailer name strategy. In such a context, industrialists will indeed develop original operations (merchandising projects, theme actions, promotions) specific to the name and adapted to its strategy and customers.

For industrialists, what is at stake with category management is to switch from a commercial relationship centred on negotiation to an approach to increasing profitable turnover based on shared information.

Opportunities are significant :

- *Durably influencing distributors with the main levers* (offer, shelf space, promotions...) to improve one's own brand name results. Pickling attests to that. Product offer is quite distinct from consuming time. Products offered to consumers are better perceived and considered as correlated or substitutable to their needs.
- *Exiting the « refund drift » logics* to generate additional turnover. First- process sea products are involved. Category management ensures a product offer better adapted to local habits and to consumers' expectations. Hence the roles of important categories of seafood products:
 - the destination categories (improved offer) ;

- routine categories (reference offer) ;
 - occasional/seasonal categories (targeted offer) ;
 - proximity categories (specific offer).
- *To better penetrate customer networks and structures* by animating the department, creating an image and defending the territory.

Conclusion

The high or low valorisation strategies as well as the marketing policies are the direct consequence of new relationships between purchasers and suppliers. These relationships also depend on the share of the national purchases face to imports. This new configuration is not homogeneous. One notes the existence of varied models. How each actors apprehends the costs of transaction taking into account the markets explain each model. It is thus normal that one observes differentiated strategies.

In conclusion, contractual relationships built to obtain the best valorisation along the chain of value modify transactional determinants.

This induces new types of coordination :

- When convention is based on the market functioning, actors are able to assess directly the quality of the various goods exchanged: it is exclusively based upon merchant relations and price. The type of coordination is merchant coordination.
- When convention is based on standards and objective rules, there exists external standards, as well as a process through which actors can check the ability of others to respect the rules. The type of coordination is industrial coordination.
- When convention is based on sustainable links between actors, there are relationships based upon confidence in people and brands, resulting from past transactions. The type of coordination is domestic coordination.
- When convention is based on collective principles, the support of a number of actors for a body of collective principles that leads to organise their economic relations. The type of coordination is civic coordination.

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