

# Tint blir ferskt i britiske supermarkeder

Torskefiskkonferansen 2010

Tromsø 28.10.2010

Finn-Arne Egeness

Forsker

Nofima

# Agenda

- Utvikling i kategorien brett pakkede torskeprodukter
- Betjente fiskedisker
- Hva har skjedd og hvorfor?
- Hva med forbruker?

MARKS &  
SPENCER

fresh  
never frozen

2 COD

FILLETS

No skin or bone

Chunky fillets of moist  
and succulent cod,  
just ready to cook.



SUITABLE FOR  
FREEZING



MICROWAVE  
OR OVEN

FISH FROM

KEEP REFRIGERATED 0°C to +5°C

DISPLAY UNTIL

21 OCT

USE BY

21 OCT

£ PER kg  
13.49

kg  
0.258

PACK  
PRICE

£ 3.48



0 01 7762 703483 >



## COOKING, CARE & STORAGE

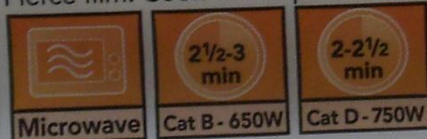
This product is raw fish and must be cooked according to guidelines. As size and thickness of fish may vary, please note that larger, thicker pieces may take longer to cook.

Preheat oven. Remove packaging. Place on oiled foil. Season with salt and pepper. Dot with butter. Close foil loosely over product. Place on a baking tray.



The fillet will begin to flake when cooked.

Microwave ovens vary. The following is a guide only. Remove outer film and pad. Cover with microwaveable film. Pierce film. Cook on full power.



After cooking leave to stand for 1 minute. Two or more packs will require longer cooking time. Check that product is piping hot before serving. The fillet will begin to flake when cooked.

**Do not reheat.**



Freeze on day of purchase. Use within one month. Defrost thoroughly before use.



Although extra care has been taken to remove all bones, some small ones may remain.



Our fresh cod is fished from the deep waters of the Atlantic, then airfreighted to the UK within hours of landing.



Cod's large, succulent flakes taste delicious in a fish pie or baked with Mediterranean vegetables. Makes a great alternative to haddock.

**Packaged in a protective atmosphere for freshness.**

### NUTRITION

Typical Values Per 100 g:  
**Energy 335kJ/80kcal** ·  
**Protein 18.3g** · **Carbohydrate Nil**,  
of which sugars Nil · **Fat 0.7g**,  
of which saturates 0.1g ·  
**Fibre Nil** · **Sodium 0.06g** ·  
**Equivalent as salt 0.1g.**



UK BB 011 FE  
EC

Fish caught in the  
North East Atlantic  
Packed in the UK.  
© Marks and Spencer plc  
Baker Street London  
W1U 8EP 2000  
[www.marksandspencer.com](http://www.marksandspencer.com)





READY TO COOK

KEEP REFRIGERATED 0°C TO +5°C

DISPLAY UNTIL	USE BY
<b>19 MAR</b>	<b>19 MAR</b>

PRICE PER Kg	
<b>14.99</b>	<b>0.244kg</b>

PACK PRICE	<b>£3.66</b>
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0 01 7762 703667 >

MARKS &  
SPENCER

# 2 Fresh **Cod** Fillets

NO SKIN OR BONE	NATURALLY LOW IN	SUITABLE FOR FREEZING
	FAT	



### COOKING, CARE & STORAGE

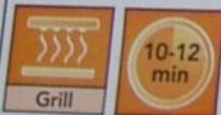
This product is raw fish and must be cooked according to the cooking instructions. As size and thickness of fish may vary, please note that larger, thicker pieces will take longer to cook. Remove all packaging.

#### For best results oven bake.

Preheat oven. Place product on foil. Dot with butter and season with salt and pepper to taste. Wrap product loosely in foil and place on baking tray.



Domestic grills vary. The following is a guide only. Preheat grill to medium. Coat fillets lightly in seasoned flour. Place product directly on base of grill pan. Dot with butter. Turn once during cooking.



Do not reheat.

Freeze on day of purchase. Use within one month. Defrost thoroughly before use.

Although extra care has been taken to remove all bones, some small ones may remain.

### NUTRITION

Typical Values	Per 100 g
Energy kJ	335
kcal	80
Protein g	18.3
Carbohydrate g	Nil
of which sugars g	Nil
Fat g	0.7
of which saturates g	0.1
Fibre g	Nil
Sodium g	0.06
Equivalent as salt g	0.1

### GUIDELINE DAILY AMOUNTS

Recommended by nutrition professionals for average adults

	Per 100 g	Woman	Man
Calories	80	2000	2500
Fat g	0.7	70	95
Salt g	0.1	5	7

Packed in the UK with North East Atlantic cod.

© Marks and Spencer plc  
PO Box 3339 Chester  
CH99 9QS 2000

M 0177 627 S

find out more

[www.marksandspencer.com](http://www.marksandspencer.com)



for the love of  
**food...**



All of our fresh cod is caught in the deep, icy cold water around Iceland.

We work in partnership with the best boats and fishermen who pride themselves on catching the finest cod every day. It is line caught, not trawled, which means that there is less damage to the fish therefore maintaining quality, texture and colour. The cod is then hand filleted and flown daily to the UK ensuring fantastic freshness. Olafur Bjornsson fishes cod for Marks and Spencer: "Icelanders have a passion for fish which is passed down for generations. For this reason we ensure that we fish sustainably which means care for the environment goes hand in hand with managing fish stocks."

to make this even more  
**special...**

Lightly season the cod fillets with salt and cracked black pepper and bake in buttered foil. Serve with grilled tomatoes, garlic mushrooms and some **buttery mashed potatoes.**

MARKS &  
SPENCER

## 2 Cod Loin Fillets

*Our sustainably sourced Cod  
is delicious baked in the oven.*

*This medium flavoured fish  
has a large flaking texture*



DISPLAY UNTIL/USE BY

22 Mar

PRICE/Kg

£ 19.99

PACK WEIGHT

0.287 Kg

PACK PRICE

£ 5.74



0 055800 605740 >



KEEP REFRIGERATED 0°C TO +5°C  
READY TO COOK

Marks & Spencer

2 cod loin fillets

Our sustainably sourced cod  
is delicious baked in the oven

This medium flavored fish  
has a large flaking texture




## COD LOIN FILLETS


Fry, grill, bake or poach -  
**FOR BEST RESULTS BAKE**

As size and thickness of fish may vary,  
please note that larger, thicker pieces will take  
longer to cook.

### OVEN


Remove all packaging. Preheat oven.  
Place product on foil. Dot with butter and season  
with salt and pepper to taste. Wrap product loosely  
in foil and place on baking tray.

 190°C Fan 165°C 375°F Gas 5

 15-17 mins

Do not reheat.

### STORAGE

 Suitable for freezing.  
This product may have been frozen and  
returned to chill temperature.  
Further freezing will not affect quality.  
Freeze on day of purchase.  
Use within one month.  
Defrost thoroughly before use.

NUTRITION		GDA
Typical values	per 100g	adult
Energy kJ	380	
Energy kcal	90	2000
Protein	18.8g	45g
Carbohydrate	0.3g	230g
of which sugars	0.3g	90g
Fat	1.5g	70g
of which saturates	1.0g	20g
Fibre	0.3g	24g
Sodium	0.06g	2.4g
Equivalent as salt	0.20g	6g

GDA = Guideline daily amount

### DISPOSAL

PACK



plastics

NOT CURRENTLY  
RECYCLABLE

### IMPORTANT



This product is  
raw fish and  
must be cooked  
according to  
the cooking  
instructions.

Although extra  
care has been  
taken to remove  
all bones, some  
small ones may  
remain.



As part of a  
healthy  
balanced diet,  
you should  
eat at least  
2 portions of  
fish a week.



Our cod is caught with hook and line by a  
small number of fishing boats, specially  
selected by M&S. Our fish is selected from  
the best of the daily catch and filleted by  
hand for outstanding quality.

Packed in Scotland with cod caught in  
the North East Atlantic. 2000

© Marks and Spencer plc  
PO Box 3339 Chester CH99 9QS  
marksandspencer.com

UK  
BB 011  
EC



TESCO Responsible Sourced

# COD FILLETS



Caught in **North East Atlantic  
- Norway**

Catch method

**Long Line**

Display until

**17 Mar**

Use by **7 70 16:17**

**17 Mar**

Weight (kg)

**0.386**

£/kg

**8.00**

Price

**£ 3.09**



0 297462 003094 >



Suitable for  
home freezing

A typical fillet contains

Calories	Sugar	Fat	Saturates	Salt
150	0g	1.7g	0.4g	0.5g
8%	0%	2%	2%	8%

of your guideline daily amount

Keep refrigerated. Once opened, use immediately.

**Cod (*Gadus morhua* or *Gadus macrocephalus*)  
fillets, skin on, bone in.**

**Oven:** • Remove all packaging. • Place on a baking tray in the centre of a pre-heated oven 180°C/350°F/Gas Mark 4 for 15-22 minutes.

• Adjust times according to your particular oven. (For fan assisted ovens cooking times should be reduced). • All appliances vary, these are guidelines only. • Check food is piping hot throughout before serving.

• Not suitable for cooking from frozen.

**Freezing guidelines:** • Freeze on day of purchase. Use within one month.

**Defrost:** • Defrost thoroughly for a minimum of 10 hours in a refrigerator. **IMPORTANT: If food has thawed, do not refreeze.**

**Caution:** • This product will contain bones.

**Storage:** • Keep refrigerated. • Once opened, use immediately. • This product may have been previously frozen and has been restored to chill temperature under carefully controlled conditions. It is still suitable for home freezing. • Use by: see front of pack.

**Nutrition**

**Additional information:**

• Packaged in a protective

**Storage:** • Keep refrigerated. • Once opened, use immediately. • This product may have been previously frozen and has been restored to chill temperature under carefully controlled conditions. It is still suitable for home freezing. • Use by: see front of pack.

**Additional information:**



Sainsbury's

*Taste the difference*



## Line caught Cod loin

skinless & boneless

**chunky** cod loin from the clear waters of the North East Atlantic ocean.

Keep refrigerated		
Use by	kg	£/kg
17 MAR	0.268	15.99
Pack price		£ 4.29
Landed in		Iceland
0 275263 004298 >		

2019

Cod and loins are cut from large cod, which are line caught in the well managed fisheries off the Icelandic, Norwegian and Faroese coasts. The size of the fish produces chunky loins which are ideal for all types of recipe.

#### Nutrition information

Typical values (steamed as per instructions) Per 100g: Energy 350 kJ; 83 kcal; Protein 18.6g; Carbohydrate nil of which sugars nil; Fat 0.9g of which saturated 0.7g; Fibre nil; Salt 0.2g of which sodium 0.07g.

The Wheel of Health is based on guideline daily amounts. For more information call 0800 636262 or visit [www.sainsburys.co.uk/health](http://www.sainsburys.co.uk/health)

#### Ingredients

Cod.



**Allergy advice**  
Contains fish.



**Safety** Although extra care has been taken to remove all bones, some may remain.

#### We care...

...about our quality and what you think. If you have any comments, good or bad, please call us on our Careline 0800 636262 or visit [www.sainsburys.co.uk](http://www.sainsburys.co.uk)  
Packaged in a protective atmosphere. Caught in the North East Atlantic Ocean and packed in the UK for Sainsbury's Supermarkets Ltd, London EC1N 2HT.  
See reverse for GDA information, storage and cooking instructions.

UK  
GG199  
EC



## Try...

...sprinkling with herbs and lemon crumbs, serve with lemon wedges and parsley.

## How to store and cook

Use by: see front of pack.



### Keep refrigerated

For maximum freshness, store at less than 5°C and consume within 24 hours.

This product has been previously frozen - do not refreeze.



### Oven cook from chilled

Electric	180°C
Gas	4

1 Preheat oven to the required temperature as shown. 2 Remove all packaging. 3 Place the fish in foil to form a parcel. 4 Place on a baking tray in the centre of the oven and cook for 25-30 minutes.



### To grill

1 Pre-heat grill to a moderate heat. 2 Remove all packaging. 3 Place the fish onto the base of the grill pan. 4 Brush the top of the fish with oil or butter. 5 Place the grill pan in the middle position in the grill. Cook without turning for 15 minutes.



### To poach

1 Remove all packaging. 2 Place the fish in a pan with enough milk or water to cover. 3 Bring to the boil and simmer gently for 10 minutes.



### To shallow fry

1 Remove all packaging. 2 Coat the fish lightly in flour. 3 Heat 10ml of oil in a frying pan over a medium heat. 4 Gently lower the fish into the hot oil. 5 Cook for 10-12 minutes, turning occasionally.



### To steam

1 Bring a pan of water to the boil on a medium heat. 2 Remove all packaging. 3 Place the fish on a plate and cover with foil. 4 When the water is boiling, place the plate on top of the pan. 5 Continue to cook on a medium heat for 20-24 minutes.

As the natural thickness and size of the fish and the performance of cooking appliances may vary, these are guidelines only. Always check that the product is piping hot before serving.



All fish on our counter is fresh and never frozen

FISHMONGER  
Fish of the day  
Fresh King  
Salmon  
Save £1  
£18.99 per  
Lovely fresh fish!





MORRISONS  
Morrisons Supermarkets PLC, 801 St...

GER

terfly

Use by

18JUN

£1.00

MORRISONS

Morrisons Supermarkets PLC, 801 St...



9.99 0.305kg 18JUN

ALWAYS KEEP THE FISH IN THE FRESH STORE

£2.05

MORRISONS



YOUR FISHMONGER

### Fresh Cod Fillet With Parsley

Ideal to Grill, Bake, Poach or Microwave

May Contain Bones  
Good to Freeze

Caught in North East Atlantic  
Line and seine net, caught in in shallow waters  
Sustainable (see code)

1.0g Net weight Use by

9.99 0.310kg 18JUN

£3.30

ALWAYS KEEP THE FISH IN THE FRESH STORE

MORRISONS

Morrisons Supermarkets PLC, 801 St...



# Brettpakkede produkter

- Stor variasjon i tidligere behandling av råstoffet
  - May have been previously frozen
  - Previously frozen
  - Ingen informasjon
  - Fresh, never frozen
- Fokuset på ferskhets har forsvunnet
- Større fokus på bærekraft og fangstredskap



# Brettpakkede produkter

- Tint fisk har fått innpass i etablerte ferskfiskkanaler (supermarkeder).
- Endringene skjer i alle de store kjedene slik som Tesco (31 %), ASDA (17 %) og Sainsbury`s (12 %)
- Morrisons (12 %) har differensiert seg med å bruke genuint ferske produkter (som aldri har vært fryst)
- (% = markedsandel av det totale dagligvaremarkedet).

# Hvordan ser det ut i ferskvaredisken?

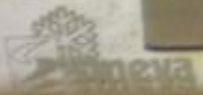
- Waitrose
- Tesco
- ASDA
- Morrisons



Control Standard  
Fresh Hake  
Fillets  
£15.99  
kg  
£7.99/lb

**FISH OF THE DAY**  
Fresh Icelandic  
Prime Cod  
Loins  
Loin caught in the North  
East Atlantic Ocean  
Offer ends 31/03/24

**SAVE  
1/3**  
~~£17.99~~  
**£11.99**  
kg  
~~£5.99/lb~~



# Skinless and Boneless Atlantic Cod Loin

Juicy, firm white fish, caught by line or  
seine net.

Responsibly Sourced from  
Well Managed Fisheries

May have been previously frozen, however, is still suitable for home freezing. Wild  
caught in the North West Atlantic, the North East Atlantic. Equivalent to £6.65/lb.

£1.47 100g

£14.67 kg

Guide price per loin is

£2.93

Based on an average weight of 200g



Responsibly Sourced from  
Well Managed Fisheries

**£2.93**

Based on an average weight of 200g

May have been previously frozen, however, is still suitable for home freezing. Wild caught in the North West Atlantic, the North East Atlantic. Equivalent to £6.65/lb.

# Fresh Fish



Our collection of fresh fish - just ask!

Haddock & Cod Fillet Portions  
**2 for £3**  
Cod Fillet

Your delicious fish  
in 3 easy steps

1. Pick your fish and choose your butter
2. We'll put it in the oven ready bag
3. Just pop it in the oven!



Loxote  
**£4**

with these specials  
for a day



# Cod Fillet

Cod Fillet

£5.00

Per Kg

£8.70

**£5.00**

Caught in NE Atlantic.  
Previously frozen.  
May contain nuts, seeds & other allergens.

All fish on our  
counter is **fresh**  
and **never**  
**frozen**

*100% of the time!*

**Save  
£2**

Fresh Smoked Haddock Loin  
Maximum 100g per portion  
Contains no added colour

~~£12.29~~  
**£10.29**

Smoked **£9.99**

Net Caught in North East  
in 21st March



# Bakgrunn for markedsendringer

- Aktørene i verdikjedene opplevde en varierende og uforutsigbar tilgang på ferske torskeprodukter i perioder av året (sommer)
- Hvordan løse denne utfordringen?
- Leverandører fant det hensiktsmessig å forsøke tinte produkter
- Akseptert av kjedene etter vareprøver

# Leverandører

- Selvstendige økonomiske aktører
- (Seachill, The Seafood Company, Cumbriand, Sealord)
- Avgjør hvilket råstoff som skal brukes (ferskt eller tint)
- Ingen sammenheng mellom tidligere behandling av råstoffet og utsalgspris
- Profittmaksimering styrer valg av råstoff (samme pris i butikk)
  - Lavere råstoffpris gir større marginer
  - Substitusjon hele året



# Leverandører

- Mange produktalternativer for innkjøper;
  - Fersk filet
  - Fryst filet
  - Sløyd og hodekappet fisk
- Tint fisk gir (ofte) lavere transaksjonskostnader;
  - Mindre svinn
  - Enklere logistikk
  - Færre uforutsette hendelser

# Supermarkedskjedene

- Stabilt og forutsigbart utvalg av alle fiskeprodukter hele året, som bidrar til større lønnsomhet





## OUR NEW FISH COUNTER

Welcome to our Fish counter. Fish counter gives you the option of purchasing fresh fish to be delivered directly to your door. Use our Fish Counter Option tool to easily browse our fresh fish range and provide you with suggestions for filleting, wine matches and reasons to buy fish.

Browse our fresh fish range, using our [Fish Counter tool](#) >

### Reasons to buy fresh fish from tesco.com:

- Fresh fish delivered straight to your door
- Over 50 fresh fish and shell fish to purchase
- Low in calories and packed with goodness
- Download and print our preparation guides



## WINE AND FOOD MATCHING



## REASONS TO EAT FISH

*"Tesco take care to maintain the quality of our fish at every stage from the boat or the farm to our stores. As soon as the fish are brought aboard the fishing boats or taken from the farm they are chilled down in ice (or ice cold water for smaller fish like mackerel and herring) and kept at that temperature all the way to the factory that processes and packs our fish. To give a full range of fish all year some of our fish and shellfish has to be frozen in peak condition and carefully defrosted to preserve the flavour and texture that we demand for our customers. The emphasis with all our fish is on the speed of processing in a temperature controlled factory, and the fish is soon in a chilled lorry on route to our store. We keep your fish in the best possible condition to preserve the delicate flavours and texture."*



## PREPARATION GUIDE

**"We know you love fish and shellfish..."**

*...which is why we work daily to ensure we source products in a Responsible manner"*



## RESPONSIBLE FISHING



**Find out more about Tesco's sourcing policies at Greener Living**

## SOURCING POLICIES

## OUR FRESHNESS STATEMENT

# Fokusgruppeundersøkelser i UK

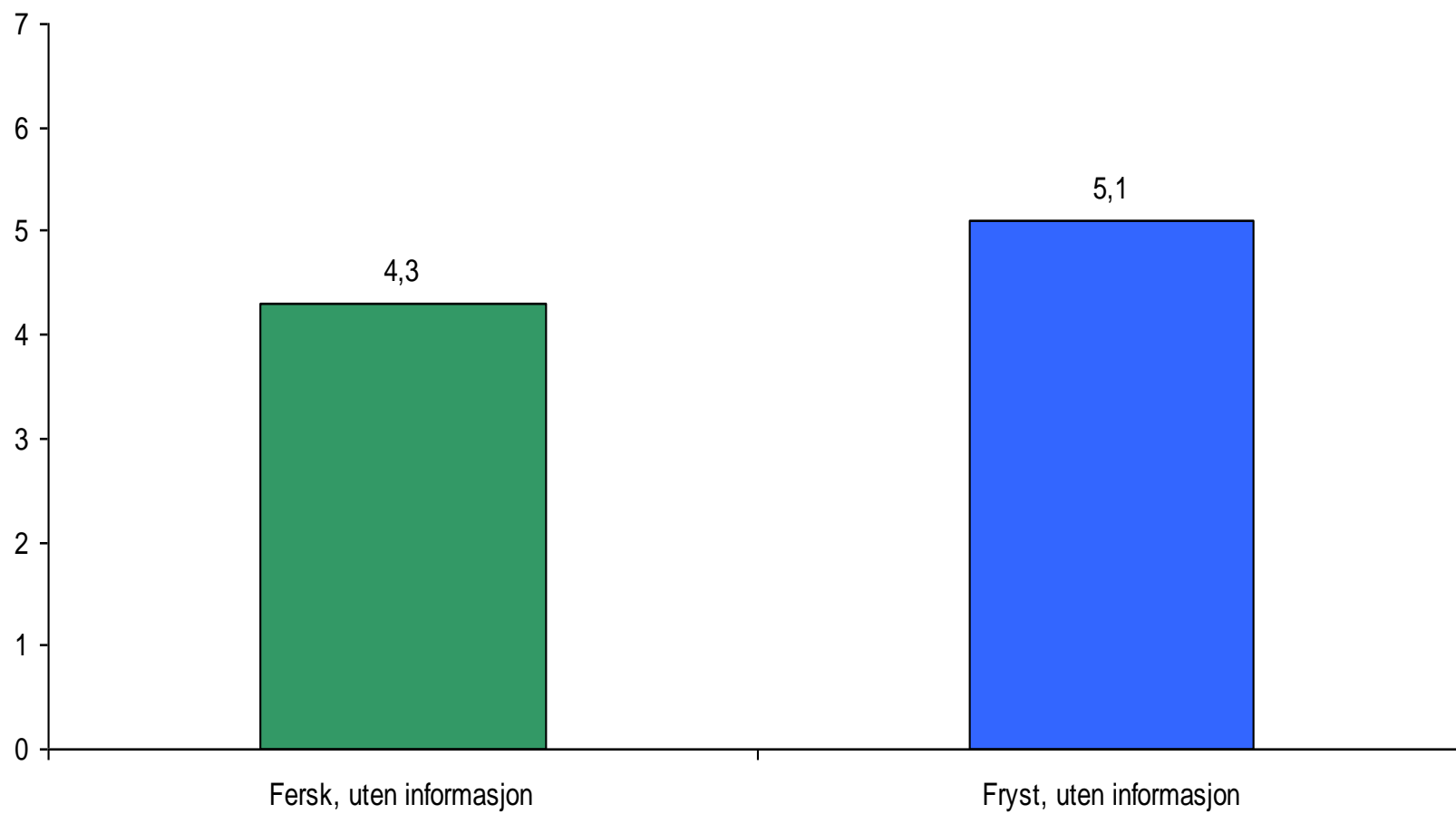
- Britiske forbrukere oppfatter “chilled” som ferskt
- Liten eller ingen kjennskap til endringene i kategorien



# Forbrukertest i UK - forbrukers oppfatning av tinte og genuint ferske fiskeprodukter

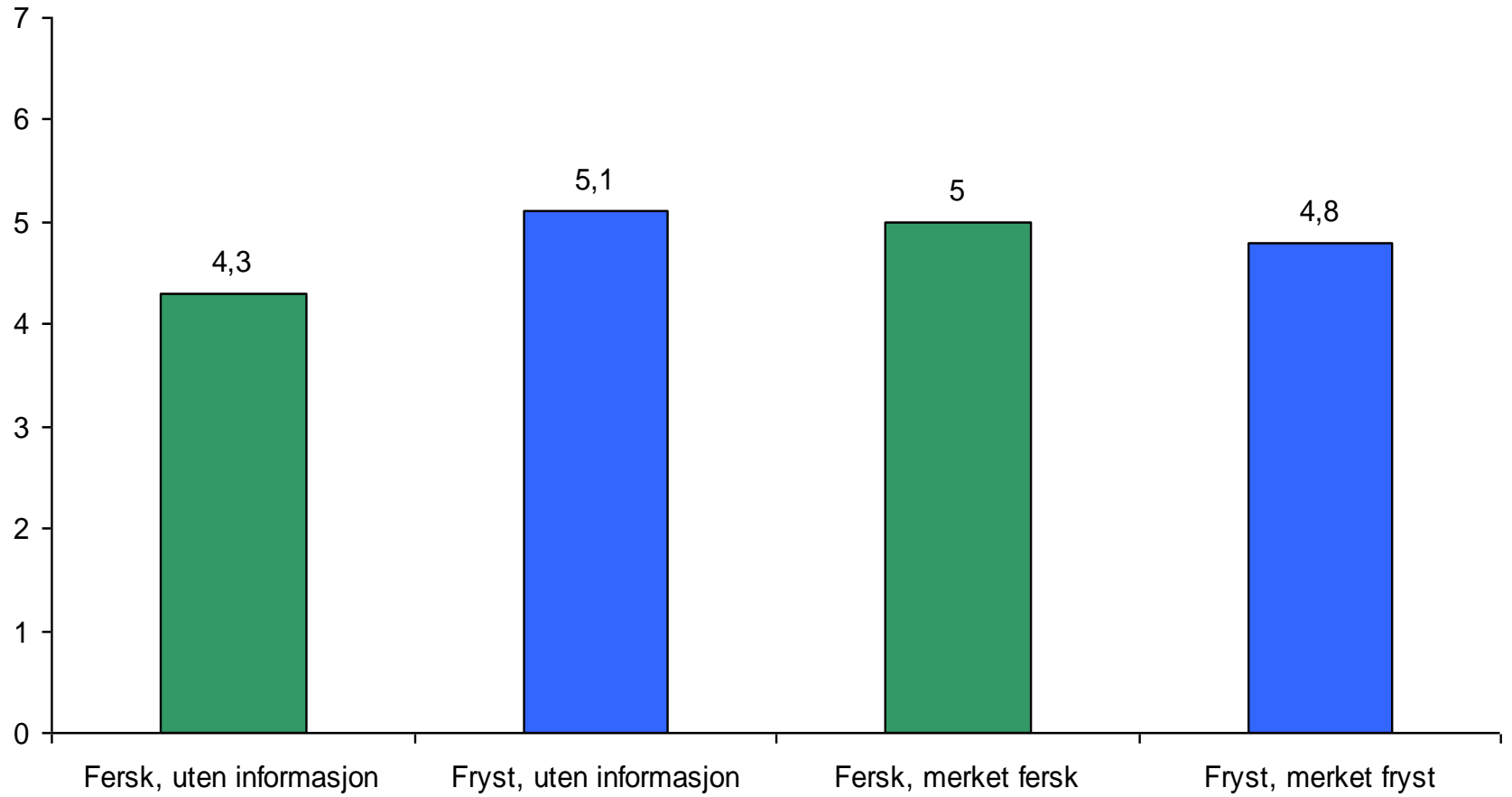
- Reading, England
- 136 personer, 70 % kvinner og 30 % menn
- Helt eller delvis ansvar for innkjøp av mat
- Råstoff - levendelagret (ufôret) torsk. Halvparten fryst i 2 uker, andre sendt fersk til markedet
- Prøvene ble servert kokt, naturell
- Hver runde bestod av en fersk og tint prøve
- Første par uten informasjon, andre par med informasjon og tredje par med uriktig informasjon
- Forbruker rangerte produktene på en skala fra 1-7

### Helhetsinntrykk av fisken 1-7

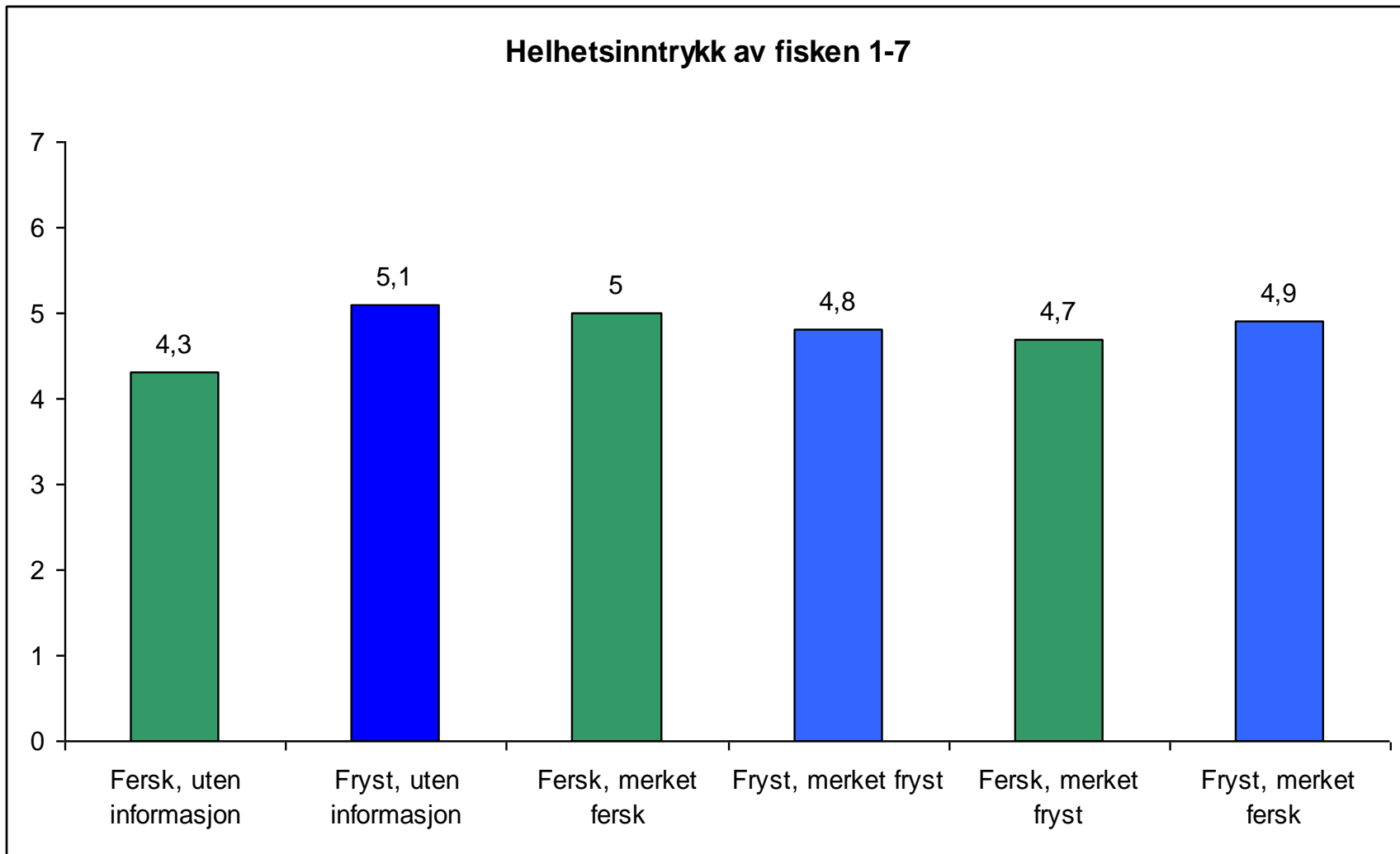




### Helhetsinntrykk av fisken 1-7



### Helhetsinntrykk av fisken 1-7



# Oppsummering

- Tint fisk har fått innpass i etablerte kanaler for fersk fisk i det britiske markedet
- Indikasjon på at konsumentene i liten grad er klar over denne endringen
- Lønnsomhet og stabil tilførsel er drivkrefter for endring
- Tint fisk aksepteres av forbrukere
- Informasjon om ferskhets gir bedre helhetsinntrykk for fersk fisk
- Hvordan er utviklingen i andre segmenter i andre markeder?
- Hvordan vil dette påvirke norsk fiskerinæring?
- Les mer i informasjonsheftet i konferansemappen



# Takk for oppmerksomheten.

Finn-Arne Egeness

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+ 47 90 65 88 40

Nofima