

Building Country and Brand Loyalty

An exploration of successful (and not so successful) national and corporate seafood marketing initiatives

Carson Roper
Independent Consultant
IISS 2020, Cochin, India

What is a brand?

The American Marketing Association defines a **brand** as “A brand is a name, term, design, symbol or any other feature that identifies one seller’s good or service as distinct from those of other sellers. ISO brand standards add that a brand “is an intangible asset” that is *intended to create “distinctive images and associations in the minds of stakeholders, thereby generating economic benefit/values.”*¹



What is a customer loyalty?

“Driving loyalty is very different from driving repeat sales. There are always reasons people will do business with you that have nothing to do with you — timing, price, convenience, lesser of evils and force of habit are just a few. These things can help influence an initial sale and they can influence repeat business, but they do not influence loyalty. Just because someone buys from you over and over does not make them loyal.”² Simon Sinek author of *Start with Why*

Bottom line: Loyal customers are willing to suffer an inconvenience to purchase a good or service.

Retail (B2C) private label brands



**Kroger 2018 sales US \$121.2 billion:
Simple Truth sales exceed US \$2.3
billion (Kroger 2018 Factbook⁵)**



**2018 sales US \$9.2 billion
(Forbes⁶)**



HORECA B2B and B2C brands



9

Sysco 2019 Annual Report:
Total sales of US \$60.1 billion¹¹



10

GOLDEN GATE CAPITAL
Privately Holding Company:



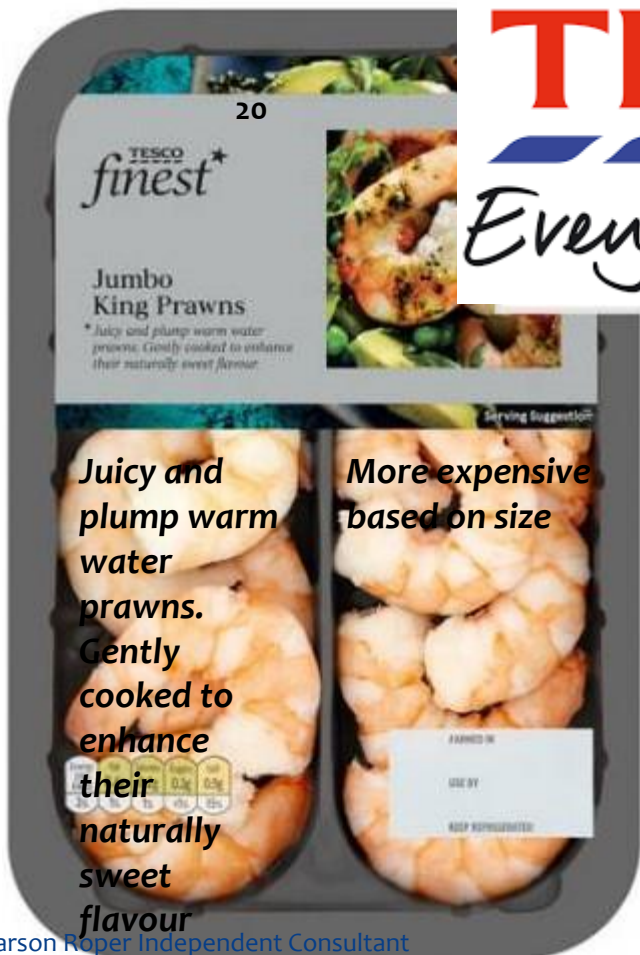
12



13

Estimated sales US \$2.405 billion¹⁴
(Forbes)

Segmenting and Enhancing Brands



Are there country brands?

By extrapolation, a country brand differentiates products by origin, with the intent of creating a competitive advantage.

In the EU, there are protected geographical indications. “(Protected) Geographical indications (GIs), a type of intellectual property right, are considered as indications which identify a good as originating in the territory of a country, or a region or locality in that territory, where a given **quality, reputation or other characteristic of the good is essentially attributable to its geographical origin.** Well known examples of GIs are Parma Ham, Champagne and Feta.”²²

Scottish Farmed Salmon Is Protected²³



Scottish Farmed Salmon has held Protected Geographical Indication (PGI) since 2004.

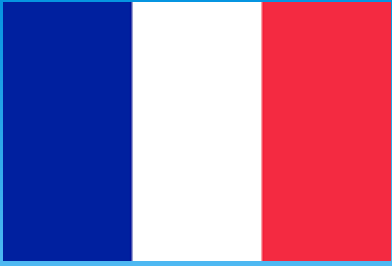


24



PGI is awarded by the European Commission and is an initiative which protects and promotes the designation of a quality food or farmed product, linked to the name of a region, a specific location or, in exceptional cases, that of a country.

To hold PGI, Scottish salmon farmers must comply with the criteria laid down in a specification approved by the European Commission and controlled by an independent Certifying Body, Food Certification International Ltd.



French Farmed Oysters Have Protected Status²⁵

Marennes Oléron

THE ONLY OYSTERS CERTIFIED



Other Examples of Regional/National Brands

Case studies:
Alaska and Norway

State of Alaska, USA ²⁶

- * Alaska fisheries generate US \$13.9 billion in economic output and US \$5.2 billion to the Alaska economy each year
- * 5.7 billion lbs in 2017/2018 season
- * Alaska fisheries directly employ 60,000



27

Wild, Natural & Sustainable®

Alaska King Crab²⁸



Alaska – Certified Sustainable²⁹



**Alaska Responsible
Fisheries Management**

NEW Logo Details!

OLD LOGO
(Phased out by 9/22/2020)

NEW LOGO
(Available for use now)



Alaska Seafood Marketing Institute

“80% of consumers surveyed say that seeing the Alaska Seafood logo would increase their likelihood to purchase”³⁰

Successful!



31



Norwegian Seafood Council

- * Offices in: Norway; Brazil; China; Dominican Republic; France; Germany; India; Italy; Japan; Poland; Portugal; Singapore; South Korea; Spain; Sweden; Turkey; United Arab Emirates; United Kingdom; United States and Western and Central Africa.
- * 3 priorities: marketing; market research and communication/risk management
- * Funded by annual registration fee as well as export and research fees.
- * Spent US \$27.8 million marketing Atlantic salmon in 2016 alone (11 Aug 2017 IntraFish)

Norwegian Seafood Council³²

NORWEGIAN
SEAFOOD
COUNCIL

Norwegian

Search

Register or sign in

https://www.youtube.com/watch?time_continue=8&v=2UJtfGhcR5c&feature=emb_logo

About Norwegian Seafood
Council

<https://youtu.be/SJbsAuHo-fs>

Norwegian Seafood Council

“Norway exported 2.7 million tonnes of seafood to a total value of NOK 107.3 billion in 2019. This represents a 3 per cent decrease in volume but an 8 per cent (or NOK 8.3 billion) increase in value, compared to 2018, which was a record year. This corresponds to 36 million meals every day throughout the year, or 25,000 meals per minute.)”³³

Successful!

Premium paid for Norwegian seafood products!

Vietnam and Pangasius

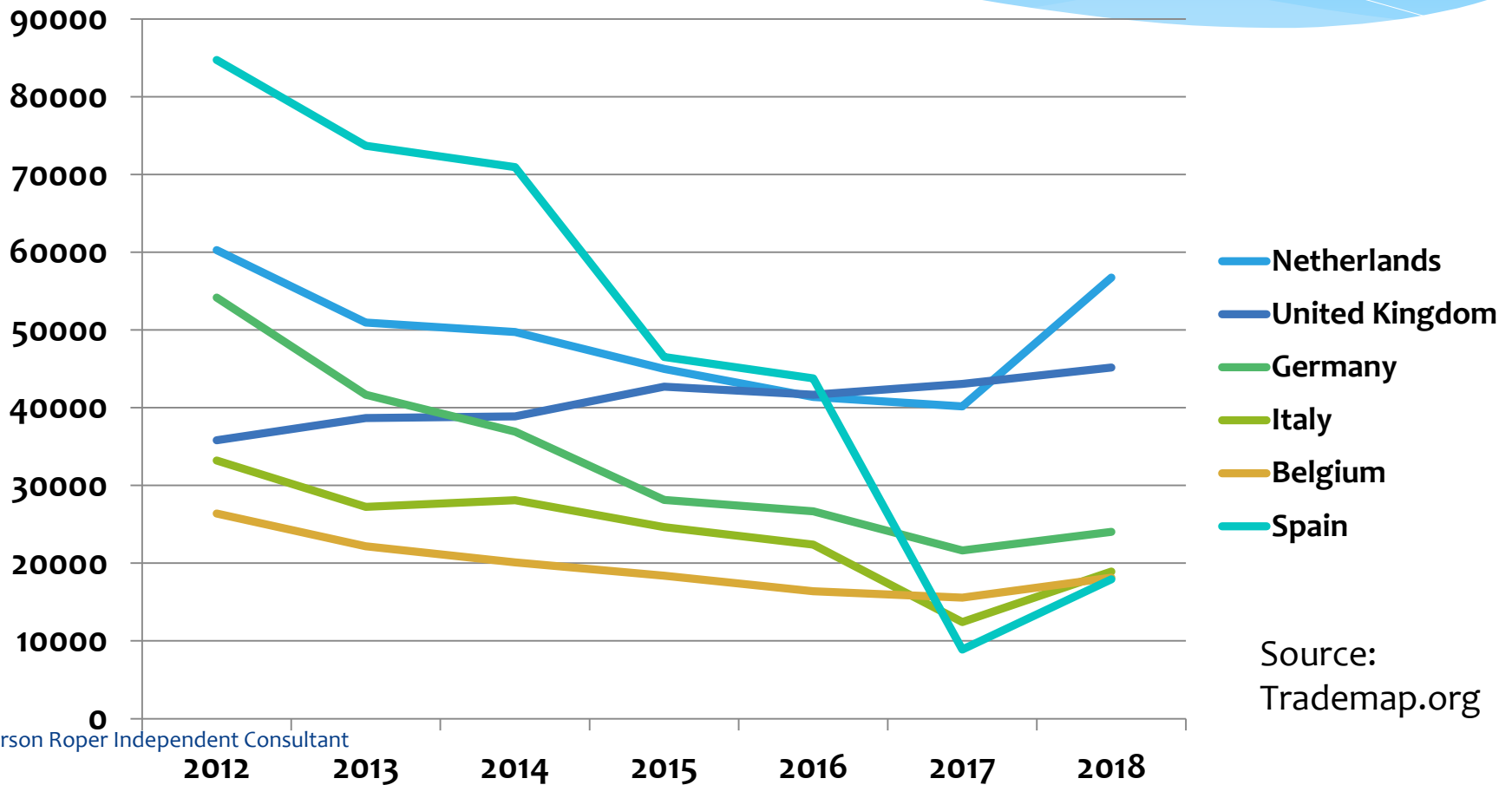


34

- * Vietnam Association of Seafood Exporters and Producers initiative to counter negative campaigns against Pangasius in Europe
- * Launched in Brussels 2014
- * Website in English, Dutch, German, Italian and Spanish (not Chinese)

Trade with Europe

Trade with Germany up 32.5% in 2019 over 2018 (Q1, Q2 & Q3) Source: VASEP



Vietnamese Pangasius Trade 2019



Through November 2019 (11 months)³⁵

- * Total export value down 11% Y-O-Y
- * US imports down 47.7% Y-O-Y
- * EU imports down 0.1% Y-O-Y
- * China imports increased 47%



Salmon from Chile

- * In 2016, the Chilean National Fisheries and Aquaculture Service (Sernapesca) began certifying antibiotic-free Atlantic salmon farms in Chile
- * 110 certified by summer 2019
- * 2 Nova Austral farms first to be awarded antibiotic-free certificate in 2016

Promise of Patagonia³⁶



Launched at SENA 2019 in Boston

The Promise of Patagonia

Chilean salmon is raised in the pure Antarctic waters of coastal Patagonia. As stewards of this remarkable ecology, Salmón de Chile proudly produces high-quality salmon using environmentally responsible and sustainable aquaculture. We are farmers committed to performing with honesty, integrity, and in the best interest of consumers, our members, employees, and the environment. This is our promise: a conscious and sustainable collaboration between nature and nurture.

Salmon from Chile Progress Report

- * Chilean Salmon Antibiotic Reduction Program (CSARP)
 - * Chilean Salmon Marketing Council, SalmonChile and Monterey Bay Aquarium initiative
 - * Objective to reduce antibiotic usage by 50% by 2025
- * July 2019 Nova Austral antibiotic free certification suspended
- * July 2019 Nova Austral ASC certification suspended

Negative press...

Sustainable Shrimp Partnership³⁷

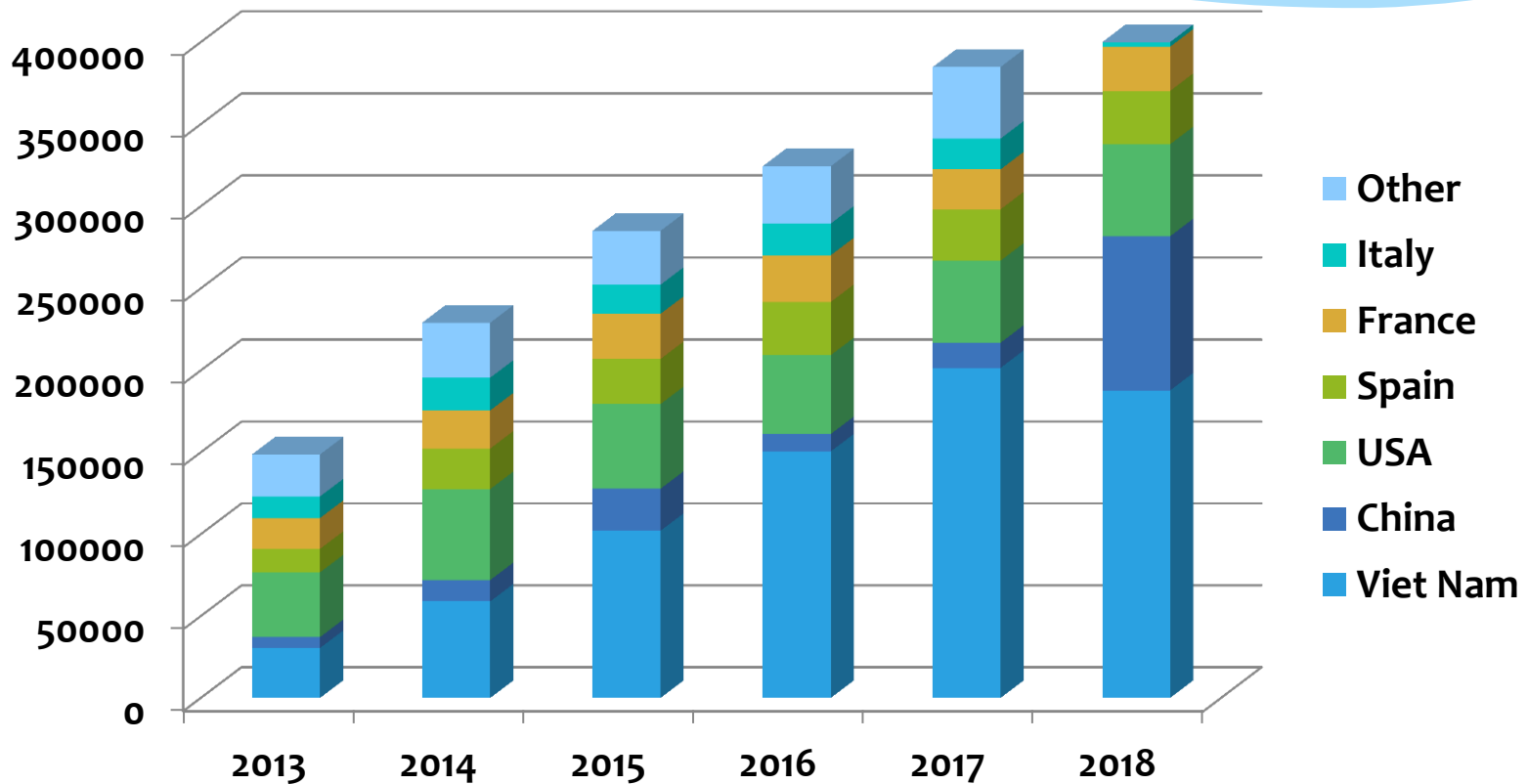


Launched Seafood Expo North America 2018 with 4 requirements

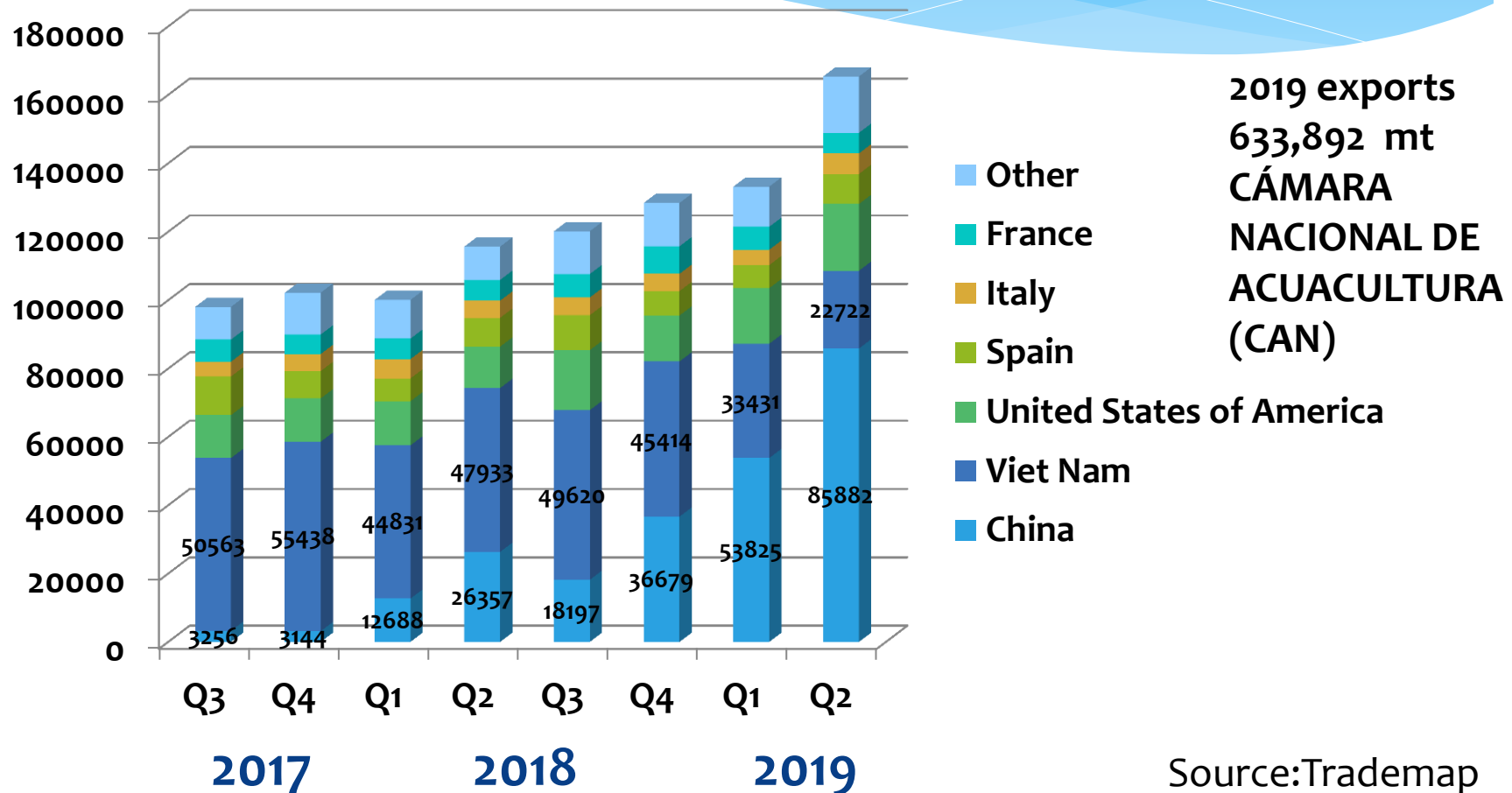
- * ASC certification
- * Certified antibiotic free
- * Zero-impact on the water
- * Traceability

Objective 20% of shrimp production in Ecuador qualifies in 1st year

Ecuadorean Shrimp Trade



Ecuadorean Shrimp Trade



Source: Trademap



USA Shrimp Marketing Initiative

Launched at the Global Aquaculture Alliance GOAL 2018 conference in Ecuador

- * 6 additional meetings of members and a 7th planned in Boston at SENA
- * industry members plus National Fisheries Institute involved
- * 3 funding models: USDA (avocado model); Indian Initiative (ASMI/NSC model) and voluntary
- * Estimated cost US \$15 mil per year timeframe 5 years (min. 3 years)

For information contact: Jenni Davis jdavis@cport.net

Conclusions

39

1. Identify why you want and need a brand

Ecuador already had a brand identity!



— ECUADOR —
FIRST CLASS SHRIMP

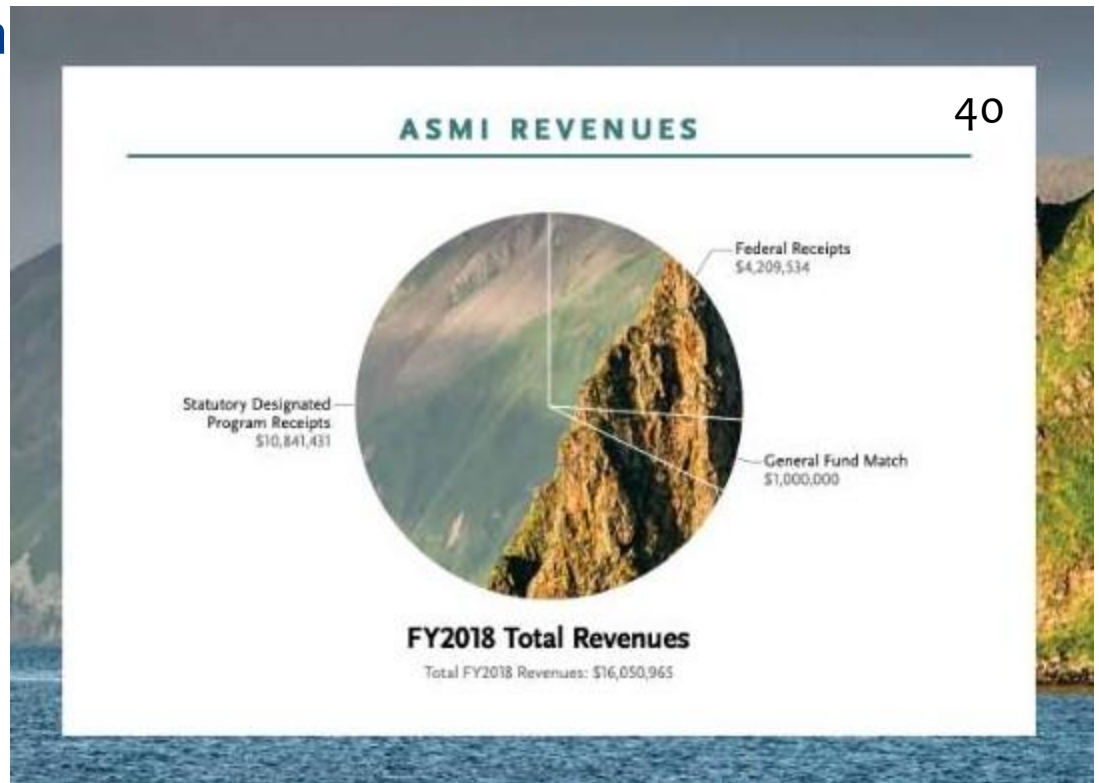
IN PRODUCTION SINCE 1969
AND STILL GROWING

Conclusions

1. Identify why you want a brand
2. Money and govern



NSC 2018 budget
of US \$50.25 million
(Undercurrent News) ⁴¹



Conclusions

1. Identify why you want a brand
2. Money and government support helps
3. B2B vs B2C dilemma

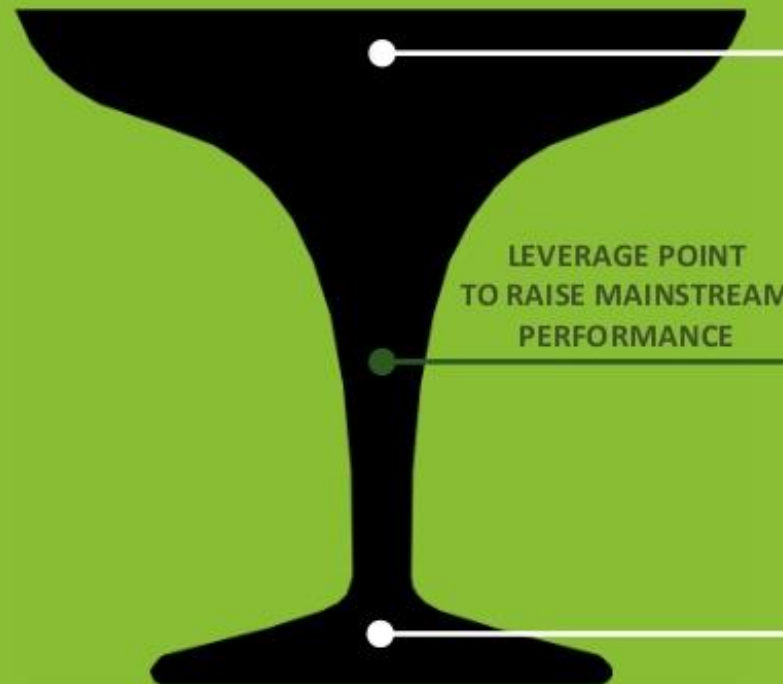
Conclusions

B2B vs B2C dilemma

42



WWF's theory of change



7 Billion

CONSUMERS

300 ~ 400

COMPANIES

- Retailers
- Brands
- Manufacturers
- Traders
- Processors
- Investors

1 Billion

PRODUCERS

Conclusions

1. Identify why you want a brand
2. Money and government support helps
3. B2B vs B2C dilemma
4. Know how your audience choice edits

Conclusions

Know how your audience choice edits

“This whole question has enormous significance for the environment, of course. Should we still have the choice to buy products or services if it is known they have a *negative environmental impact*? Or should our rights as consumers 'needing' choice outweigh such considerations?”

Source: Should you have a choice to choose? Leo Hickman asks should environmentally harmful products be 'edited' off the consumer menu? GREENLIVING BLOG; Posted by [Leo Hickman](#) Friday 7 September 2007 11.01 BST guardian.co.uk

Conclusions:

It is all about commitment and follow through

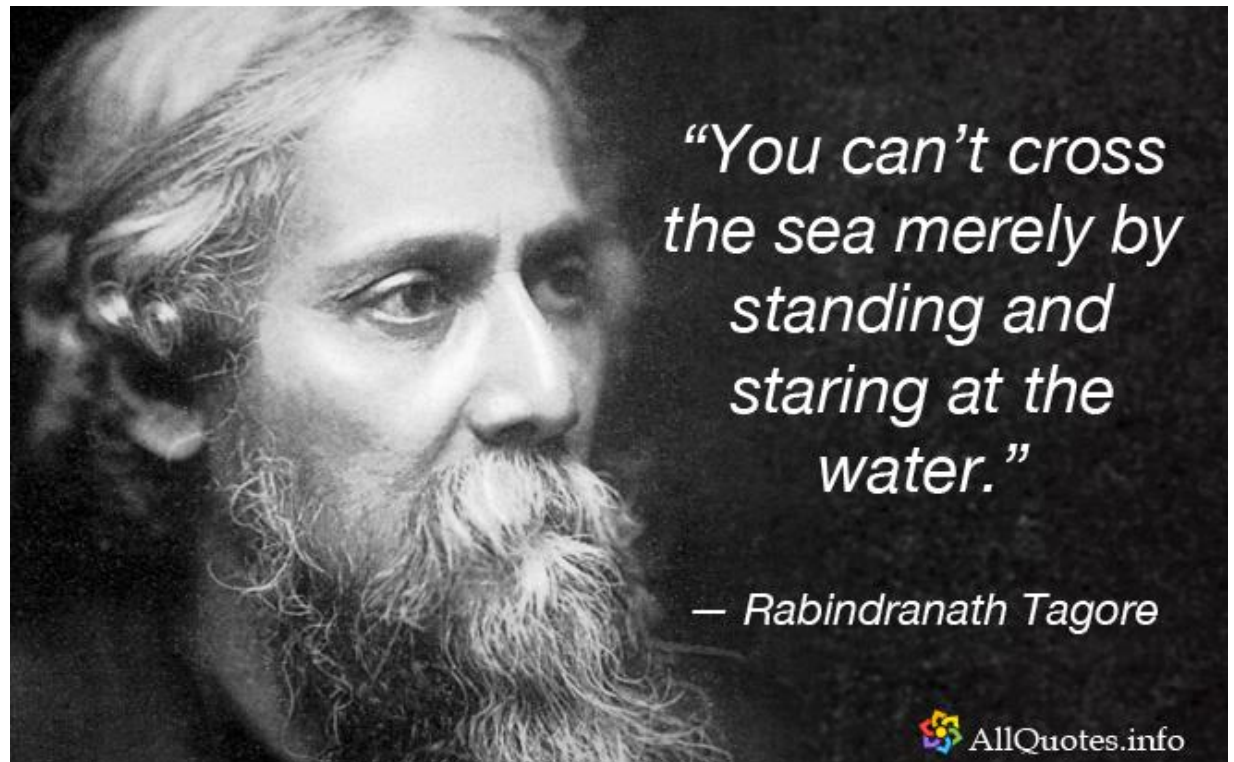
1. Identify why you want a brand
2. Money helps so does government support
3. B2B vs B2C dilemma
4. Know how your audience choice edits
5. It is all about commitment and follow through

Conclusions:

It is all about commitment and follow through

Thank you

carsonroper@hotmail.com



References

1. <https://www.ama.org/the-definition-of-marketing-what-is-marketing/>
2. https://www.huffpost.com/entry/customer-loyalty-what-its_b_104567
3. <http://ir.kroger.com/>
4. <https://shop.wegmans.com/product/29280>
5. <http://ir.kroger.com/Cache/1001254339.PDF?O=PDF&T=&Y=&D=&FID=1001254339&iid=4004136> p. ii & 14
6. <https://www.forbes.com/companies/wegmans-food-markets/#67a1c4dc5ff4>
7. <https://www.kroger.com/b/simpletruth/why-simple-truth>
8. <https://shop.wegmans.com/product/29280>
9. <https://www.sysco.com/>
10. <https://www.linkedin.com/company/golden-gate-capital>
11. http://investors.sysco.com/~/_media/Files/S/Sysco-IR/documents/annual-reports/2019%20Annual%20Report%20FINAL.pdf p. 18
12. <https://www.redlobster.com/>
13. <https://www.sysco.com/Products/Products/Specialty-Meat-and-Seafood/Specialty-Seafood.html>
14. <https://www.forbes.com/companies/red-lobster/#6ad925aa37e5>

References

15. <https://twitter.com/syscostl/status/999066950696357888?lang=da>
16. [https://us7.campaign-archive.com/?u=eef6250e5f4ea6d238f76a30d&id=c8ba545e29&e=\[UNIQID\]](https://us7.campaign-archive.com/?u=eef6250e5f4ea6d238f76a30d&id=c8ba545e29&e=[UNIQID])
17. <https://www.carrefour.fr/enseignes/market>
18. <https://www.picard.fr/crevettes-crues-16-24-00000000000048020.html?cgid=poissons-crustaces&prefn1=gammesPoissons&sz=50&start=0&prefv1=Crevettes&viewAll=1>
19. <https://www.picard.fr/on/demandware.store/Sites-picard-Site/default/Search-Show?fdid=quiSommesNous>
20. <https://www.tesco.com/groceries/en-GB/products/301795306?currentModal=ImageZoomModal&selectedUrl=https%3A%2F%2Fdigitalcontent.api.tesco.com%2Fv2%2Fmedia%2Fghs%2Fad6dfc23-7623-425b-9544-3ebca4edf4fd%2F2cf58814-824c-4177-9236-b9d8bed9373d.jpeg%3Fh%3D540%26w%3D540>
21. <https://www.brandsoftheworld.com/logo/tesco-4>
22. <http://iprhelpdesk.eu/news/european-commission-study-value-eu-geographical-indications>
23. <http://scottishsalmon.co.uk/protected-geographical-indication/>
24. <https://www.marketingweek.com/salmon-farmers-in-quality-drive/>
25. <https://www.huitresmarennesoleron.info/>
26. <https://www.alaskaseafood.org/the-catch/economic-benefit/>
27. <https://www.facebook.com/ASMINewsAndUpdates/photos/a.2294691727230151/2296061123759878/?type=1&theater>
28. <https://www.alaskaseafood.org/retail/marketing-tools/merchandising-tools/wild-alaska-crab/>
29. <http://www.nativehebrideansmoked.com//>

References

29. <https://uploads.alaskaseafood.org/2019/10/New-RFM-Logo-Info-sheet-US-Final-Updated-Oct-2019.pdf>
30. <https://www.alaskaseafood.org/retail/marketing-tools/power-of-the-brand/>
31. <https://www.facebook.com/ASMINewsAndUpdates/photos/a.2294691727230151/2296061123759878/?type=1&theater>
32. <https://en.seafood.no/about-norwegian-seafood-council/>
33. <https://en.seafood.no/news-and-media/news-archive/norwegian-seafood-exports-top-nok-107-billion-in-2019/>
34. <https://youreverydayfish.com/>
35. <https://www.seafoodsource.com/news/supply-trade/vietnam-s-pangasius-export-value-slides-for-ninth-consecutive-month>
36. <https://thepromiseofpatagonia.com/>
37. <https://www.sustainableshrimppartnership.org/>
38. Photo source: Carson Roper
39. <https://twitter.com/jcamposanoc/status/577119572500832256/photo/1>
40. https://ebooks.alaskaseafood.org/ASMI_annual_report_2018/#p=24
41. <https://www.undercurrentnews.com/2017/09/28/norways-seafood-council-to-make-cuts-with-lower-budget/>
42. <https://www.slideshare.net/sudscor/wwf-davos-commsforumfinal-32310252>