

The UK retail market for fresh and defrosted cod

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Global fish production targeting direct consumption in 2014 was 146 million tons; 87% of total fish production, of which 44 million tons is frozen (FAO, 2016). The average European in-home seafood consumption is 25.5Kg (106€)/capita/year. Portugal and Hungary occupy the two ends; 55.3Kg, 311€ vs 4.6Kg, 11€/capita/year (EUMOFA, 2016). Fresh fish from most commercial fisheries is **only seasonally available** in sufficient volumes and quality. Several processors and retailers increase seasonal availability by using defrosted fish. This strategy can be enhanced by the **optimization of the freezing and thawing technology to develop high quality fish products**. With a strong preference for fresh fish in some markets, new marketing strategies for defrosted fish need to be developed. To expand on the issues discussed above and further develop efficient freezing and thawing protocols, the strategic project **Fresk** was established by Nofima.

Retailer	Product	Defrosted	Information	MSC	Catch method	Price (£/kg)
ASDA	Cod loin	Yes	Back "defrosted"	Yes	Line	16,49
ASDA	Cod fillets	Yes	Front "defrosted"	Yes	Line	15,85
Waitrose	Cod loin	No	Back "fresh"	Yes	Line	23,04
Waitrose	Cod fillet	No	Back "fresh"	Yes	Line	19,54
Sainsbury's	Cod fillet	Yes	Back "previously frozen and defrosted without affecting the quality of the product"	Yes	Line	15,60
Morrison	Cod fillet	Yes	Back "defrosted"	No	Line, trawl, seine	16,65
Marks & Spencer	Cod Loin	Yes	Back "defrosted"	Yes	Line	22,50
Marks & Spencer	Cod fillet	Yes	Back "defrosted"	Yes	Line	17,00
Tesco	Cod loin	Yes	Side "defrosted"	Yes	Trawl	17,86
Tesco	Cod fillet	Yes	Side "defrosted"	Yes	Trawl	16,08
Co-op	Cod fillet	Yes	Side "defrosted"	Yes	Trawl	16,67

Purpose:

Create a current overview of the market situation for chilled cod products in UK retail, with focus on defrosted cod products.

Method:

Visit 7 different supermarkets (ASDA, Sainsbury's, Waitrose, Marks & Spencer, Morrison, Tesco and Co-op) in London.

Main finding:

Defrosted cod products are dominating the UK retail market. Waitrose was the only supermarket that sold fresh prepacked and fish monger cod fillets and loin, at a higher price/kg than defrosted cod in other retailers.

Conclusion

By mainly offering defrosted cod loins and fillets the UK retail market has adapted to the irregular supply of high quality fresh cod, thus making cod available to the consumers whenever they want to buy it.