

Challenging new frontiers  
in the global seafood sector  
*a Northern Enlightenment*



Industry & policy Day: Session A4:  
**Global Markets : some reflections on  
connections and prospective  
opportunities**

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# Plan:



- The Bigger picture: market dynamics
- New Marketing directions
- Information & Communications Technology (ICT) challenges
- Seafood take-aways?



# The Bigger picture: Competing in Dynamic, Global Markets

- Globally divergent concentrations of seafood production & consumption
- Seafood as the most perishable food: highly infrastructure dependent
- Complex dynamic trade patterns & economic relationships



# **The Bigger picture: Competing in Dynamic, Global Markets**

- **Climate change impacts:  
uncertainty of outputs & coastal  
infrastructures**
- **Population Growth & composition**
- **Market dynamics**



# The Bigger picture: Competing in Dynamic, Global Markets

- Population 9bn: >50% urban +
- Emergent LDC segments - BRICs
- The importing EU & BREXIT?



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**REGIONAL NEWS**  
**Brixham Trawler Race Winners**

The fifty-fourth annual Brixham Trawler Race took place on Saturday 18 June, after which more than 20 cups and trophies were awarded, reports Matt Johns.

The coveted Maasdam Bell, awarded to the...

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# The Bigger picture: Competing in Dynamic, Global Markets

- Increased competition for seafood raw material
- Increased competition for seafood products
- Increased competition from other foods



# New Market directions?

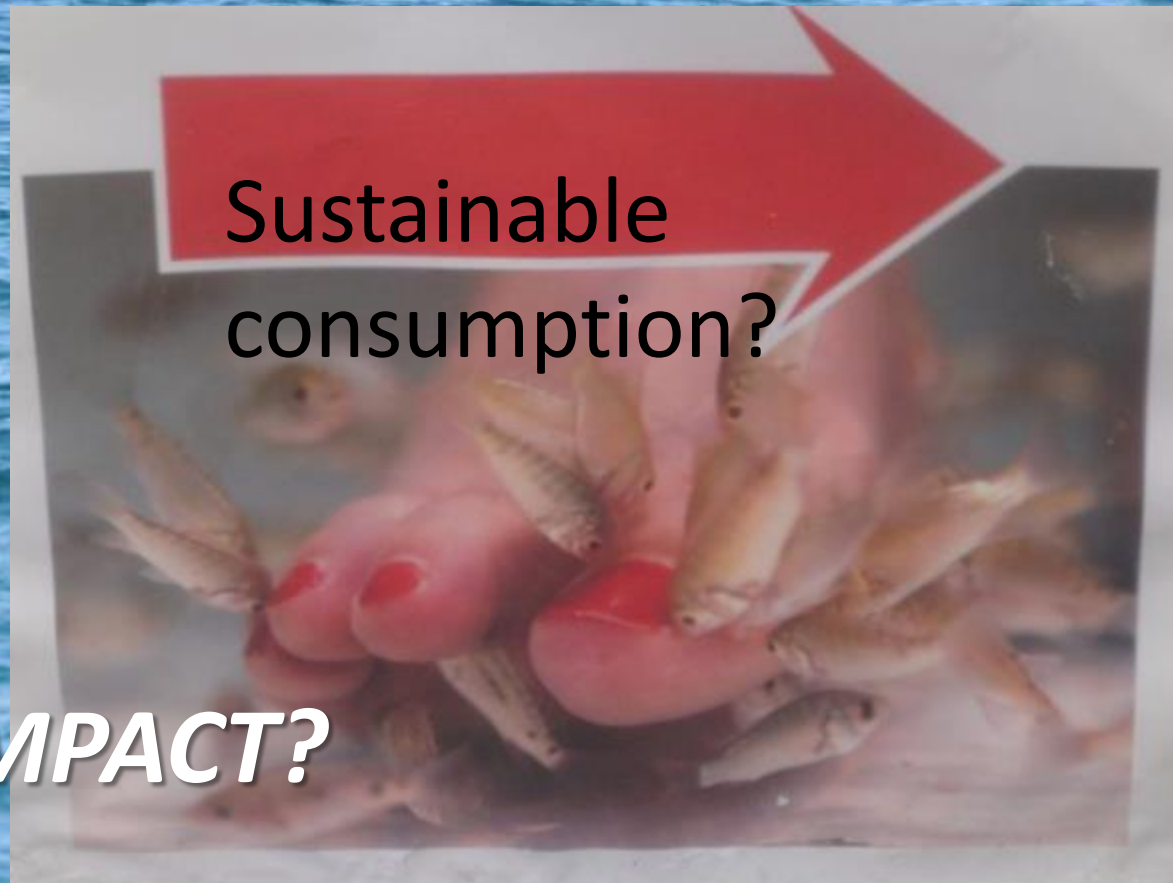
- Evolution of Sustainability
- Certification Growth
- The ratchet effect of certification
- Price premiums?
- Product longevity?
- Other + / - ?





# Widening the array of certified attributes

- Sustainability + ?...
- Provenance
- Welfare
- Ethics
- Local
- Waste
- *et al*
- *Consumer IMPACT?*





# New Market directions?

- Sustainable *Utilisation* of Resources (*not* just harvesting)
- c.50% of Raw material used for primary target market – consumption by humans
- Scope for (large) marginal gains?



# Improved raw material utilisation





# New Market directions?

- More *Responsible Consumption*
- Improved use of raw materials  
aka 'waste' – nutraceuticals/  
functional foods/ plus...
- Improved handling & processing  
– onboard and onwards
- Waste reduction





# Information & Communications Technology (ICT) challenges

- Ability to target markets more accurately
- Effective targeting demands initial Understanding
- Increased availability of data – greater granularity & qualitative



# ICT challenges in seafood

- Creation of products matching changing consumer wants
- Improved Communication channels – social media & more
- Delivering through new channels
- B-B & B-C & C-Cs2



# *ICT challenges in seafood*

The background of the slide is a stylized, abstract illustration. It features several fish of different species, including a large silver fish at the top left, a red fish in the center, a dark fish at the top right, a brown and white speckled fish at the bottom left, and a dark fish with large eyes at the bottom right. They are all set against a background of swirling, concentric blue and white circles, creating a sense of movement and depth.

- **Omni-Channel communications**
- **Social media – ongoing multiplex interactions**
- **Smarterphones & online comparisons of soft sensory data – texture, smell**
- **Proactive demands of reactive markets**



# Key Points: **Seafood Take-aways?**

- Many dynamic global demands on seafood
- Ongoing evolution of sustainability - yet tardy focus on **Responsible Consumption**
- ICT demands harbour many challenges but opportunities too for complex disparate seafood channels



A large group of sharks, likely Great White Sharks, are swimming in the water. The water is dark and choppy, with many small waves and ripples. The sharks are visible as long, greyish-brown shapes moving through the water. The text "Thank you" is overlaid in the center in a bright green, bold, sans-serif font.

Thank you



Questions ?

Questions ?

Questions ?

Questions ?

Questions ?