

# Wageningen IMARES

## Market study farmed turbot

A comparison between producers and their customers.

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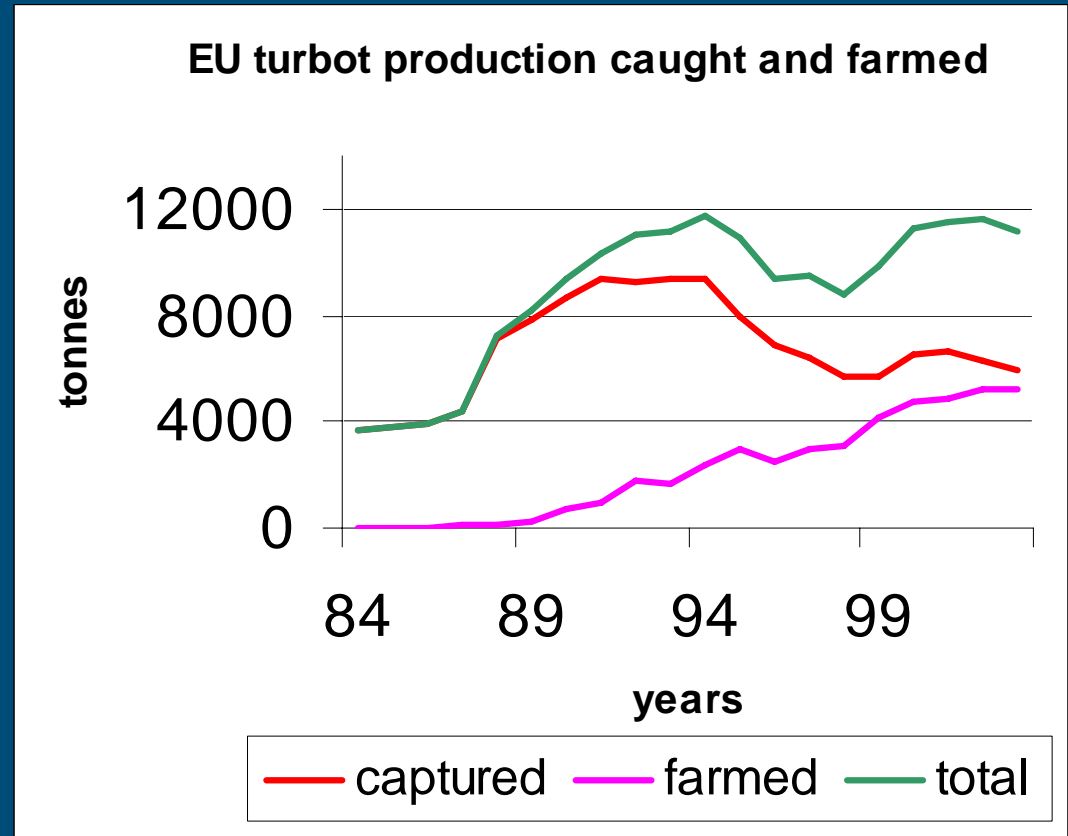
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Turbot *Psetta maxima*

# Introduction

- Increasing production farmed turbot
- Wild turbot limited supply
- Market opportunities for Farmed turbot



# Sensory comparison farmed and wild turbot

## ■ Differences

- Shelf life (farmed 9 days longer)
- Skin appearance (pigmentations)
- Fillet texture (firmer), odour (less marine), colour (less creamy)

## ■ Similarities

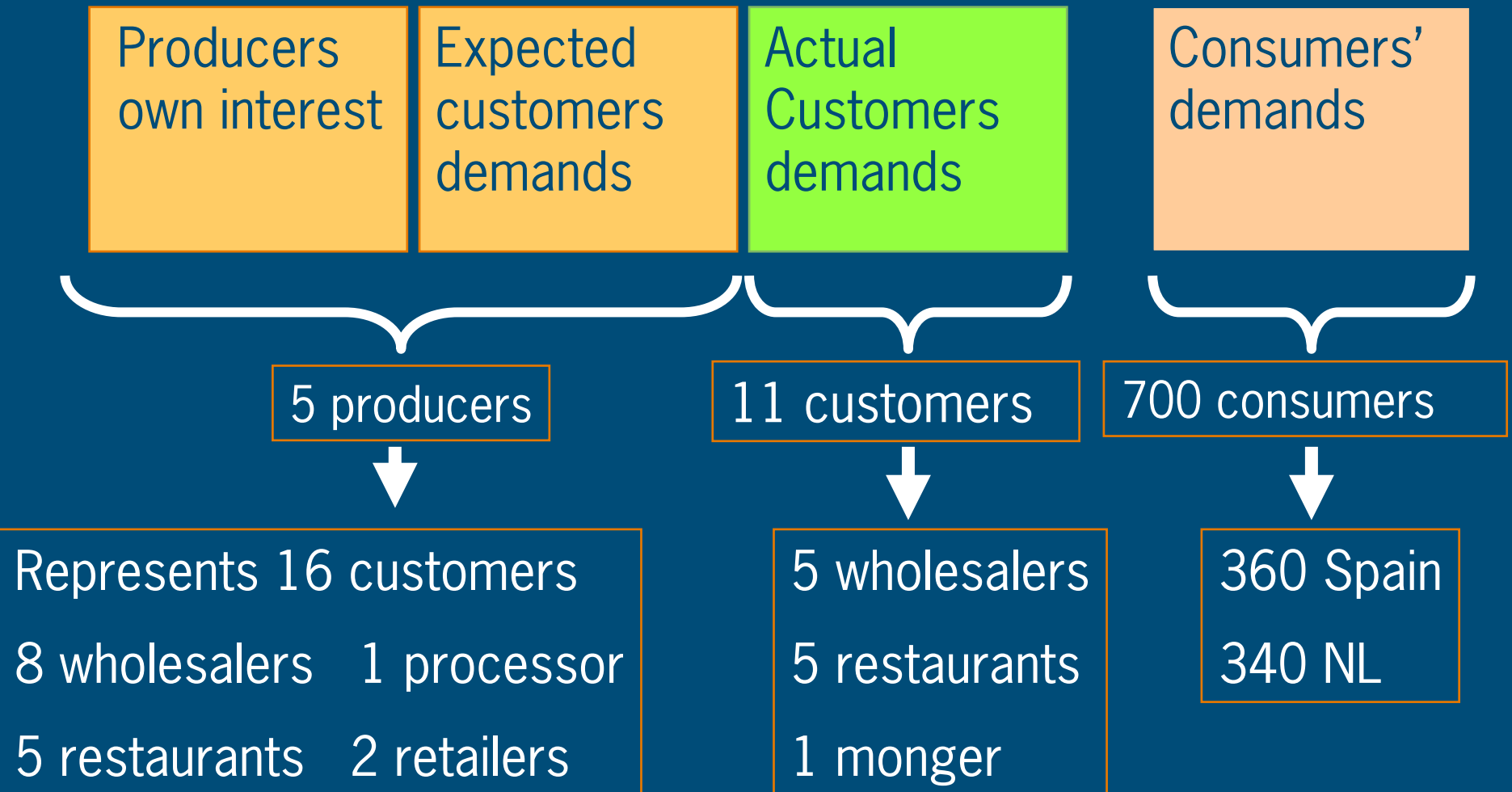
- Tender texture, potato-like flavour, chicken-like flavour

## ■ Post killing methods can change sensory properties towards wild turbot characteristics

# Objectives

- Identify marketing opportunities for farmed turbot
  - What do *producers* find important?
  - What do *producers think* their customers find important?
  - What do *customers* find important?
  - What do *consumers* find important?

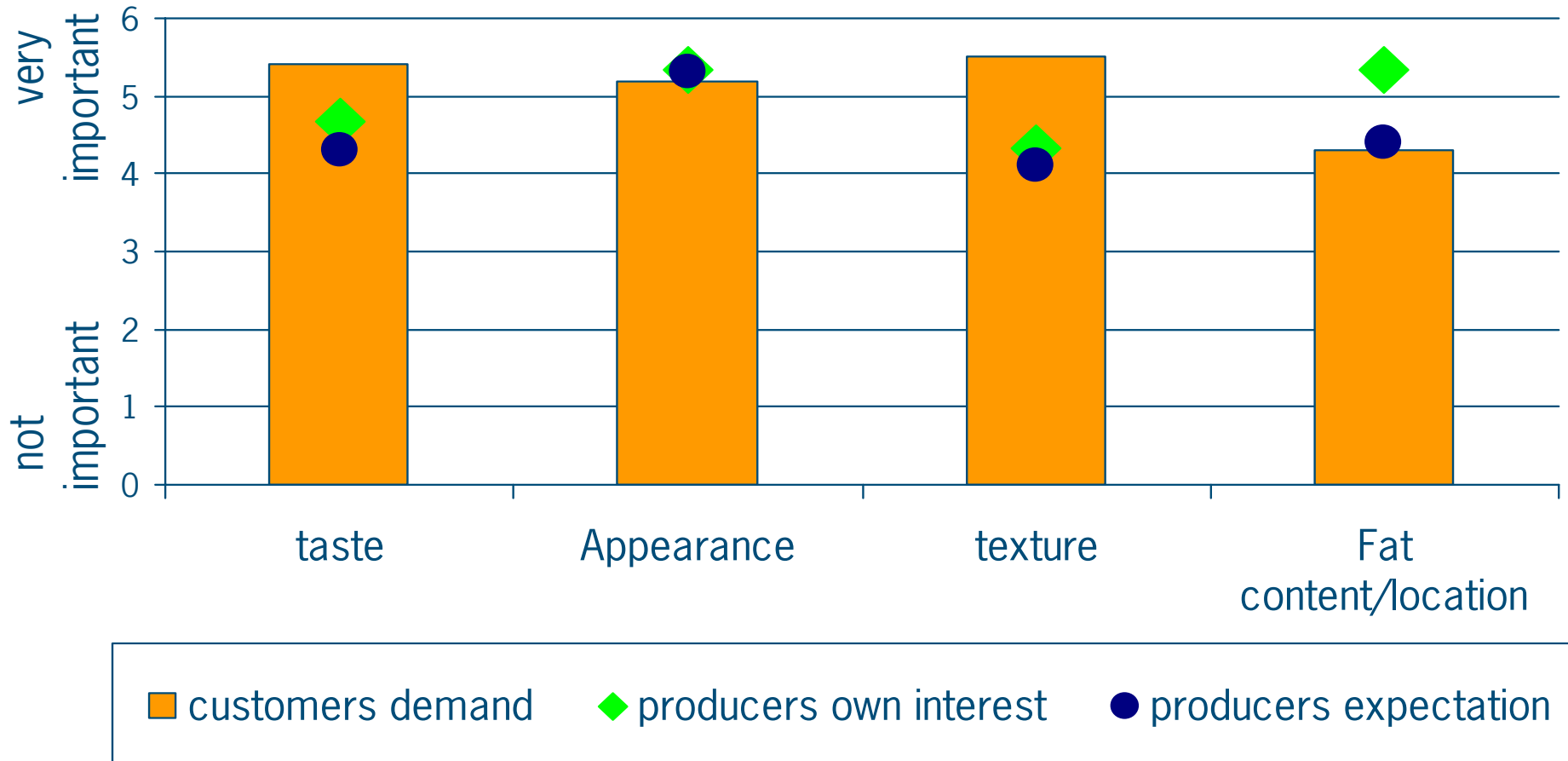
# Market study: questionnaire



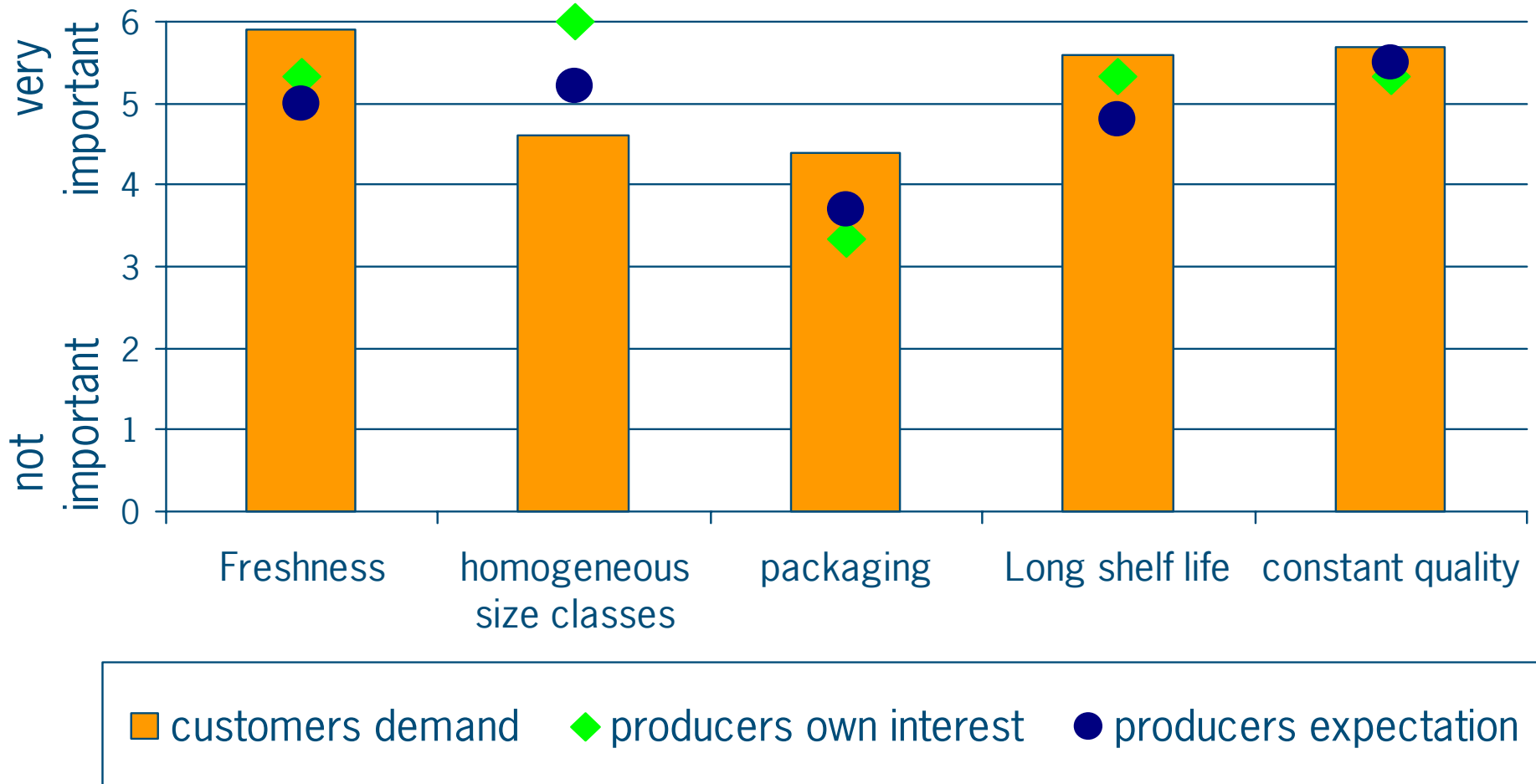
# Questionnaire: importance of ...

- *Intrinsic* product properties
  - sensory related (texture, taste, appearance)
  - quality related (size, shelf life, freshness, packaging, constant quality)
- *Extrinsic* product properties
  - image (sustainability, welfare, safety, environment)
  - information (origin, welfare, quality label, health benefit)
  - Price
- Logistics
  - delivery on demand, continuous available

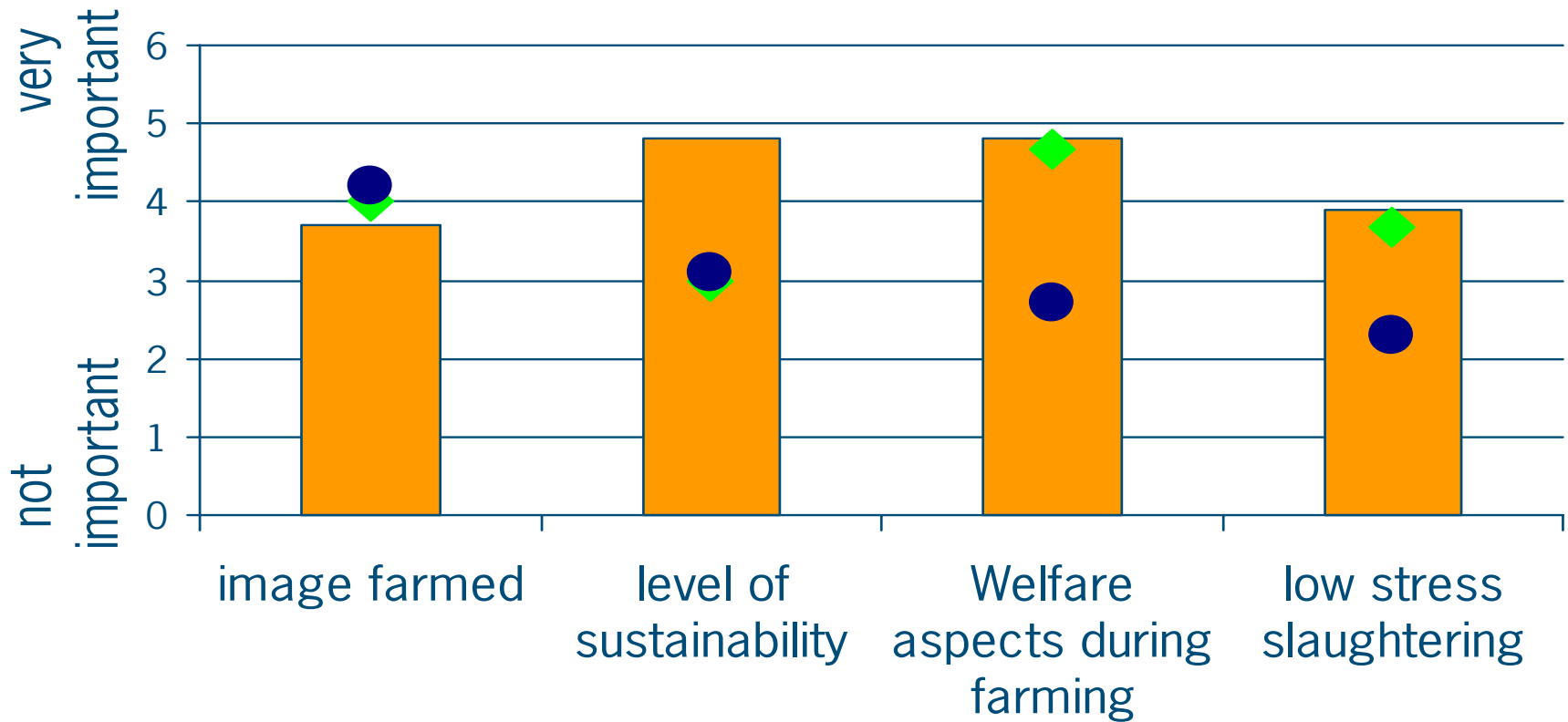
# Results: Importance intrinsic sensory attributes



# Results: Importance intrinsic quality attributes



# Results: Importance image related attributes



■ customers demand ◆ producers own interest ● producers expectation

# Results: customers motivation for buying farmed turbot

## ■ Wholesalers:

- no wild turbot available (n=3)
- customers require it (n=2)
- Low price (n=1)

## ■ Restaurants:

- New and exciting/niche product (n=3)
- Good quality fish/high standard (n=2)

# Conclusion: importance **sensory** properties

- Producers underestimate importance **taste and texture**
- Producers overestimate importance **fat content/placement**

# Conclusion: importance **quality** aspects

- **Freshness** is even more important than producers think
- Producers underestimate importance of **packaging**
- Producers overestimate the importance of **homogeneous size classes**

# Conclusion: importance **image** aspects

- For both producers and customers the **image of farmed** fish is moderately important (consumers?)
- Producers highly underestimate the importance of **sustainability**
- Importance of **welfare** is underestimated by producers, nevertheless they can (still) meet the high demands of the customers.

# Market opportunities for farmed turbot

- Improve taste and texture (e.g. by tuning post killing methods)
- Improve on packaging
- Improve on sustainability: it is important for your customers
- Consumer information ??

# Wageningen IMARES

## TURPRO CRAFT project

- SME partners:

- Llyn Aquaculture Ltd. (UK)
- Zeeland Vis BV (NL)
- A Coelho E Castro, LDA (PT)
- Ecomares GmbH & Co. KG (DE)

- RTD partners:

- Akvaplan-niva AS (IS)
- IMARES (NL)
- Department of Biology University of Bergen (NO)

- Silfurstjarnan hf (IS)



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