



**FINAL REPORT**  
**Identification of demand drivers, distribution requirements and supply chain efficiencies.**  
**To assist development of the**  
**Hiramasa Kingfish™ (Seriola lalandi) and**  
**Suzuki Mulloway™ (Argyrosomus japonicus)**  
**brands in Melbourne.**

**FRDC project 2004/404**

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**Title:**

**Identification of demand drivers, distribution requirements and supply chain efficiencies. To assist development of the Hiramasa Kingfish™ (Seriola lalandi) and Suzuki Mulloway™ (Argyrosomus japonicus) brands in Melbourne.**

**FRDC project no. 2004/404**

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## NON TECHNICAL SUMMARY

<b>2004/404</b>	<b>Identification of demand drivers, distribution requirements and supply chain efficiencies. To assist development of the Hiramasa Kingfish™ (Seriola lalandi) and Suzuki Mulloway™ (Argyrosomus japonicus) brands in Melbourne.</b>
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## OBJECTIVES

1. Undertake market research in order to obtain “gatekeeper” requirements in the Melbourne fine dining market.
2. Determine how the existing product branding anatomy, promotion and supply may meet those requirements.
3. Establish the most appropriate brand anatomy for Hiramasa Kingfish™ and Suzuki Mulloway™ in the Melbourne fine dining market.
4. Determine appropriate processes and promotional materials to support the anatomy for the Melbourne fine dining market.
5. Identify what aspects of the above objectives could underpin the development of a national aquaculture brand.

## OUTCOMES ACHIEVED TO DATE

This report identified for its industry members, what drives customer demand for their specific products in a specific market.

It showed how market share may be improved by identifying “gatekeeper” customers (chefs, distributors, wholesalers and restaurant owners), distribution channels and supply chain efficiencies in the Melbourne fine dining market and reporting on the “gatekeeper” requirements for key product features and benefits, would attract them to pay a premium price.

The report concludes that “gatekeepers” are key traders and that their behavior is predominantly driven by the achievement of margins. However, an increased price and therefore margin could be achieved if these “gatekeepers” were better educated in the features and benefits of the products that were valued by chefs and end consumers.

The report includes guidelines which the reader could consider when developing their product brand, such as the need to adequately identify the premium differentiated features and benefits sufficiently in a brand anatomy.

As a result of this project, the branding and promotion of South Australian yellowtail kingfish and mulloway has changed in order to better reflect customer requirements. Examples of revised promotional material are included in the report. These now include key elements of product brand design such as distinct iconic pictures, distinct wordmarks, simple phrases that capture the brand promises. Product provenance is identified as a

valued feature, so the report provides guidance on how to organise coordinated site visits by chefs. The chefs' visits showed the potential value of developing regional branding by exposing the chefs to a range of related products. This has assisted in the establishment of the "Eyre Peninsula: Australia's Seafood Frontier" brand.

AMFFA members wanted to identify how they could increase sales and market share for their products in various markets. They chose the Melbourne fine dining market as an appropriate example because of its size and proximity to the Eyre Peninsula. In addition, the project would not need to develop a totally new product in a totally new market.

This allowed visits to Melbourne by the consultant, in order to conduct market research to obtain "gatekeeper" requirements for AMFFA products, and thus determine valued features and benefits.

The proximity of Melbourne to the Eyre Peninsula allowed the "gatekeepers" to also visit the place of production and confirm product provenance.

The report found that "gatekeepers" to market need to be identified. These "gatekeepers" were different from the end consumers, and were the key people determining purchasing decisions in the fine dining market. Although end customer requirements may be similar to those of gatekeepers, the report found that gatekeepers do have different requirements, and it is important that the brand anatomy reflects the gatekeeper requirements.

In this case the "gatekeepers" were primarily the distributor, and on a secondary level the chef and restaurant owners.

However, the chefs can create product demand through "gatekeepers" if they perceive a higher benefit to cost ratio for product than competing products, so influencing end customers and distributors, and therefore creating "pull through" demand.

This report identified for its industry members, what drives customer demand for their specific products in this specific market, i.e. the Melbourne fine dining market.

It also considered how market share may be improved by reporting which product features and benefits attract gatekeepers to pay a premium, as identified by the gatekeepers themselves. The gatekeepers also identified what features and benefits would not necessarily attract a premium.

The report then used this information to consider whether the identified product had these required features and benefits, and whether the gatekeepers were adequately aware of these through the existing brand anatomy and promotional material.

Recommendations were then produced for AMFFA members regarding the establishment of an appropriate brand anatomy for Hiramasa Kingfish™ and Suzuki Mulloway™ in the Melbourne fine dining market.

Advice regarding appropriate supply and promotional materials was also obtained in order to support the anatomy for the Melbourne fine dining market.

As a result of this project, the branding and promotion of South Australian yellowtail kingfish and mulloway has changed in order to reflect customer requirements.

The latest websites of the AMFFA members highlight the pristine growing environment, the culinary excellence and versatility of the product, the products' excellent taste, product sustainability, and the aesthetic beauty of the product.

Examples of revised promotional material are included in the report.

The report identified that the provenance or "story" of the product was highly valued in the fine dining market. Therefore the project organised a visit by the gatekeepers to the Eyre Peninsula where the product was produced. This report provides some guidance on how to organise such a visit, and found that there was potential value for regional branding for a range of related products.

In this way, AMFFA members could consider complementary brand articulation with generic regional, statewide or national promotion of Australian seafood.

One of the results of the positive feedback from this project, has been the establishment of the "Eyre Peninsula: Australia's Seafood Frontier" brand.

The report includes guidelines which the reader could consider when developing their product brand, such as the need to get customers to adequately identify their required premium differentiated features and benefits. These should be sufficiently identified and promoted in the brand anatomy.

These draft guidelines may be considered by other aquaculture enterprises, in conjunction with a wide range of brand development literature. However, in addition to product differentiation, features and benefits which are complementary to other seafood products may also be taken into account.

The guidelines produced are not to be considered advisory, but are suggestions for consideration only, which may or may not work for different sectors in different markets.

Therefore, the reader is requested to refer to the disclaimer at the beginning of this document.

## **KEYWORDS**

Yellowtail Kingfish, Mulloway, brand, demand drivers, promotion, supply chain, gatekeepers.

## **ACKNOWLEDGEMENTS**

The authors would like to thank Seafood Services Australia, the Fisheries Research and Development Corporation and Primary Industries and Resources South Australia for their financial and operational support which greatly assisted this project.

## **BACKGROUND**

The Australian Marine Finfish Farmers Association Inc (AMFFA) was previously named the South Australian Marine Finfish Farmers Association Inc (SAMFFA).

At the time that this project was undertaken, AMFFA members predominantly farmed Yellowtail Kingfish (*Seriola lalandi*) and Mulloway (*Argyrosomus japonicus*), which was generally sold under the brand names Hiramasa Kingfish™ and Suzuki Mulloway™.

These are fairly new aquaculture products, and the members wanted to identify how best to expand their sales into new or existing markets, whilst achieving the best price.

There is a great deal of literature available which provides conceptual advice about general marketing and entrepreneurship principles when developing new products, services and brands.

A range of examples of this literature is included in the reference section of this report.

This literature points out that entrepreneurs must continuously identify and satisfy customer requirements. Product innovation and differentiation are key aspects of marketing success.

AMFFA members realised that in order to grow their enterprises, their sector, and the aquaculture industry, they must follow these principles.

They needed to identify whether they were producing innovative products for markets, which had features and benefits which were valued by customers, and in continuous demand.

The relative value placed on each feature of the product by the customer in each market, is extremely important as the industry must continuously get these product features to market at a price which makes a profit.

The members were aware that they needed to continuously balance production volumes with sales volumes and to ensure that increased sales revenue resulted in increased profit.

In the past, members had some problems adequately differentiating their product in markets, resulting in commodity pricing. They were under pressure to be “price takers” than “price makers”.

To become a price maker, they had to persuade customers of the value of their product features, which could not be obtained from other sources.

Branding and differentiation are extremely important, in order to obtain the best price for the product. This is because aquaculture product is expensive to produce in Australia

To make a profit, revenue must exceed all expenses.

However, Australian production overheads are generally much more expensive than our overseas competitors.

Australia has a good reputation for food safety and biosecurity, and this could assist brand development. However, this is generally achieved by a higher level of regulation than those encountered by overseas competitors, and food safety cannot be used to differentiate product.

In addition, the Organisation for Economic Co-operation and Development (OECD) has produced several reports, including “Sustainable Development Studies - Subsidy Reform and Sustainable Development: Political Economy Aspects” March 2007, which show that overseas competitors receive substantially greater government assistance than Australian producers.

This is also reiterated in information provided via the fishsubsidy.org project, which lists and analyses Fisheries and Aquaculture subsidies data from 1988-2007 obtained from the European Commission and member governments. The fishsubsidy.org website contends that subsidies paid to owners of fishing vessels and others working in the European fishing and

aquaculture industry under the European Union's common fisheries policy amount to approximately €1 billion per year.

It is therefore difficult to compete either in Australia or overseas, simply on price alone, against large international fisheries and aquaculture companies.

Having stated this, there are various international markets which value premium seafood products, and these value Australian product if it can be differentiated.

A great deal of the available supply of premium Australian seafood can and will be exported, whilst the price received covers all costs.

However, in addition to competing against heavily subsidised product overseas, accessing these overseas markets can be complicated by logistical issues, difficulty in meeting demanding international compliance issues, overseas trade barriers and the fluctuating dollar exchange rate.

In addition, AMFFA members were also aware that it is extremely difficult for new entrants to enter new markets with new products.

This is particularly so, if they have to endure extensive transport, distribution and logistics costs, if their production costs cannot benefit from economies of scale, and they do not have supporting promotional and supply mechanisms.

The members were therefore aware that they needed to differentiate their product from competing overseas product both in Australia and overseas, and to capitalise upon their product features in order to obtain a price premium.

The AMFFA members felt that there was great potential to develop the Australian market for Hiramasa Kingfish™ and Suzuki Mulloway™, if Australian customers would pay prices, which translated to acceptable profit margins at the farm gate level.

A lower Australian market price than overseas price could be acceptable because exports costs, transport etc would be lower. Australian customer preferences therefore needed to be identified.

As the general marketing strategy for the product needed to obtain a consistent premium price, AMFFA members needed to establish contact within a reliable Australian premium market which valued the features and benefits of the product(s) and which could be supplied by the available tonnages.

The promotional strategy objective of the members had been to attempt to differentiate their products as premium quality products as distinct from a commodity standard product.

AMFFA members assumed that fine dining markets in capital cities would appreciate, value, and pay for the differentiated quality aspects of the product.

However, it was unclear whether their initial attempts at promotion and supply could adequately achieve this objective in a range of different fine dining or other markets.



## **NEED**

AMFFA members determined that it was critical that the marine finfish farming industry increased product demand domestically and overseas, but increased supply in line with demand.

An appropriate anatomy of AMFFA members' brands was required to suit Australian and overseas markets.

They had established names for their products, and wanted to define, and / or refine the brand anatomy and determine whether a particular brand anatomy suited a particular Australian market or whether one anatomy would suit all markets.

A project was needed to determine what drove customer demand, why customers in a market would pay a premium price, how the product could be differentiated to maintain that premium, and how the product could continuously fulfil the product promises and drivers.

The Melbourne fine dining market was chosen to undertake a pilot project because of its proximity to South Australia (where the fish is farmed), which meant that logistics issues would not further complicate the project.

Before the project started, some fish were already being sold into Melbourne, but this went through various channels including the general fish market, and the Melbourne market did not appear to be as robust, nor value the product as much as the Sydney fine dining market.

It seemed logical that there could be an opportunity to increase both volume and price of AMFFA members' branded products, if they could closely meet Melbourne customer requirements.

Due to the potential for local regional and national branding, the project could also be useful in informing how enterprise and sectoral brand anatomies could differentiate products, whilst also aligning with comparative products under more generic regional or national Australian aquaculture or seafood branding.

At the time of AMFFA project proposal, the National Aquaculture Council (NAC) had commissioned a generic national project entitled "Opportunities for the Development of an Australian Aquaculture Brand"

This NAC project addressed the National Aquaculture Strategic Initiative 7, "Promoting aquaculture products in Australia and globally", which addressed the overall positioning and possible branding of Australian aquaculture in Australia and internationally.

The NAC project outcomes had not been determined, and it was open to question as to whether these outcomes would eventually involve advice on the development of a comprehensive Australian aquaculture brand, a comprehensive Australian Seafood Brand, or whether the markets or products investigated warranted a more segmented branding approach which incorporated individual brand anatomies within an overarching Australian brand anatomy.

However, the NAC project had undertaken some generic domestic research, with initial findings showing that yellowtail kingfish had the potential to replace imported products, if it

could be differentiated, and that effective branding may be an option to allow Australian aquaculture industries to be more insulated from pure price competition.

However, the NAC project had also shown that Hiramasa Kingfish™ and Suzuki Mulloway™ were not well known in the Melbourne domestic market by end consumers.

These end consumers were potential customers, but they could not provide sufficient informative advice for the national project about their potential purchasing requirements for yellowtail kingfish, because of their lack of knowledge of the product.

From an AMFFA perspective it was evident that this lack of customer product knowledge needed to be addressed through this project.

Firstly, the customer needed to be determined. Members needed to determine who exactly they were trying to convince to purchase the product.

The end consumers in the fine dining market purchased their fish from restaurants, not directly from AMFFA members. As end consumers they could create demand, but they did not appear to control present demand and pricing within the Melbourne Fine Dining market.

This appeared to be controlled by the “gatekeepers” to the market.

AMFFA therefore needed to identify the relevant “gatekeepers” to the Melbourne fine dining market.

In addition to identifying “gatekeepers”, the project also needed to identify their demand drivers for AMFFA members’ branded products.

It was evident that an enterprise or sectoral brand anatomy needed to address how the demands could be met via addressing a number of ‘back end’ promises within the brand, such as production, supply, logistics, quality control etc. These were clearly relevant to being able to consistently deliver on any brand promises at the product, species, company, regional or national level.

In essence, this practical project was needed in order to help the industry members determine a sectoral brand anatomy relating to their targeted segment of one aspect of the Australian fine dining market. This sectoral strategy could then be reviewed and developed in order to fit other market segments.

The National Aquaculture Council (NAC) supported AMFFA’s application to undertake this project.

## **RELATED BACKGROUND RESEARCH AND PUBLICATIONS**

There are numerous generic publications available regarding the principles to follow when developing a brand and planning for marketing new products and services.

For example, Levitt, Harvard Business Review Jan 1980, points out that there is no such thing as a commodity, and that all goods and services are differentiable. Customers attach value to a product in proportion to its perceived ability to help solve their problems or meet their needs.

Further, Levitt, Harvard Business Review Sept 1983 states that the product is no longer merely an item, but a whole bundle of values that satisfy buyers, and therefore an augmented product. He states that buyers want vendors who keep promises, who will keep supplying, and standing by what they promised.

Ansoff, H.I. 1971 outlines the different growth strategies required for market penetration of an existing product in an existing market; an existing product in a new market; a new product in an existing market; and diversification of a new product in a new market. The most difficult strategy is to grow a new product in a new market.

Thompson, Strickland and Gamble 2005, state that leader companies have the ability to identify key success factors in each business and that investment priority is given to businesses that provide a sustainable competitive advantage.

Aaker 1989 states that sustainable competitive advantage is influenced by the way you compete. This includes your product strategy, positioning strategy, manufacturing strategy and distribution strategy, the basis of your competition; where you compete, and whom you compete against.

Burnett, 1993, outlines stages in promotional planning and strategy.

Step one consists of establishing a situational analysis which includes identification of demand, definition of target markets, competitive assessment, legal considerations and internal organisational strengths and weaknesses.

Step two consists of establishing objectives such as relationship to market targets, communication of message objectives, and sales objectives.

Step three is the determination of dollar appropriation to various promotional elements and in total.

Step four explains that each program element must be managed effectively.

Step five explains that efforts must be coordinated and integrated.

Step six explains that the effectiveness for the program as a whole and for each program element must be measured.

It is clear from this background research that in order to develop a marketing and promotional strategy, the actual customer of the product must be identified, and they must be asked what they value in the product.

It is pertinent to note that during, and since the research for this project was undertaken, there have been several projects addressing similar issues to this project, and which may provide additional excellent complementary and alternative information.

For example, Ruello and Associates 2006, undertook a summary of FRDC funded projects entitled "Retail Sale and Consumption of Seafood - Melbourne".

The report confirms that Australians generally see seafood as a dining experience and that "fish is **not** regarded as an everyday meal for the Australian family. It is often thought of as too expensive and too difficult to prepare to be eaten regularly".

"The taste, health attributes and variety of seafood continue to be the main sales drivers nationally. However, price and consumers' lack of confidence in buying and preparing seafood, were the key factors limiting in-home consumption.

This lack of confidence at home could contribute to the increasing appeal of eating seafood out-of-home”.

However, the report also states that “Restaurants now only account for 29% of the Melbourne out-of-home seafood meals compared to 39% in 1991”.

Berkowitz, R, FRDC News Vol 6 No.2 June 2008. In the article entitled “Why Americans Prefer Seafood to Fish”, Mr Berkowitz points out that the days of commodity raw fish in retail could be a thing of the past. American consumers have embraced eating out and convenience foods, and turned away from fresh fish.

He advised that these trends could soon confront other markets, such as Australia.

However, he also notes that Australia’s restaurant prices are three to four times higher than those in the United States, which were kept low by fierce competition. This erodes margins, but keeps people eating out.

The article advises that the largest number of fish consumers today appear to be 55 plus and eat fish for longevity, with health benefits appearing to be a demand driver.

Bull, W, I the Principals website, concludes that trends that drive change in markets must be taken into account. This included whether target customers were socially active or passive and their values regarding how they could assist the environment. Brand anatomies must react to these trends and values in order to build brand loyalty.

The Ehrenberg Bass Institute for Marketing Science (University of South Australia) is presently undertaking seafood market research projects and developing a database of related research for Marine Innovation South Australia One project is *Barriers and Drivers of the South Australian Food Service Sector’s Purchase of Seafood*, June 2009.

The project surveyed 65 food purchase decision makers in the South Australian food service sector (places where people can sit in and eat lunch / dinner) about their food and seafood purchase behaviour.

The ultimate aim was to determine potential opportunities to increase the purchase of SA seafood products by the SA food service sector.

This research investigated chefs’ experience; how chefs design their menu; and how important seafood was to their restaurant.

This included, how chefs perceived fish and shellfish compared to beef, lamb and chicken with regard to various quality attributes, how chefs source their seafood, what characteristics or specifications were essential or desirable, and what could be done better in the supply of seafood.

Also, whether there was opportunity for additional local seafood dishes to be added to menus, and what were the factors that would need to be addressed for this to happen.

This report found that 40% of the chefs change their menu four times per year. Usually one menu per season, and that they look for local ingredients, seasonality and a distinctive aspect of the product.

The report concluded that the best ways to get a new item included on the menus of these chefs include: executing consistency in service, demonstrating the freshness of the product, and providing samples to the chef. Offering products at the right price points is mandatory.

The Australian Seafood Cooperative Research Centre, in conjunction with Ehrenberg Bass also offer an interactive Master Class to assist seafood companies in getting a greater understanding of the principles and practices of marketing seafood, understanding buyer and consumer behaviour, and developing marketing tools, techniques and strategies.

Given the above background and related research, AMFFA members therefore considered that if the industry was to consider developing the Melbourne fine dining market as part of its domestic marketing strategy, they needed to identify the specific “pull through” demand drivers for Hiramasa Kingfish™ (HK) and Suzuki Mulloway™ (SM) to support the fine dining experience in that market.

### **PROJECT OBJECTIVES**

1. To undertake market research in order to obtain “gatekeeper” requirements in the Melbourne fine dining market. These “gatekeepers” were the key people in determining purchasing decisions in the fine dining market.

2. Determine how the existing product branding anatomy, promotion and supply may meet those requirements.

3. Establish the most appropriate brand “anatomy” for Hiramasa Kingfish™ and Suzuki Mulloway™ in the Melbourne fine dining market.

4. Determine any appropriate processes and promotional materials to support the anatomy for the Melbourne fine dining market.

Identify what aspects of the above objectives could underpin the development of a national aquaculture brand.

### **METHODS**

Primary Industries and Resources South Australia (PIRSA) via Food South Australia, agreed to assist the project by paying for transport costs for selected Melbourne chefs, in order to visit the Eyre Peninsula to view AMFFA members farms and related sites.

This was considered to be an important part of the project as it would enhance the chefs / gatekeepers’ knowledge of the product history and story.

A consultant chef was required who already had contacts with the Melbourne fine dining chefs and distributors. This person needed to be able to converse with them as an equal and would not simply be seen to be “cold canvassing” the products.

Mr Andrew Fielke was engaged to undertake this role as he was considered to have these attributes, and was an award winning guest chef and television presenter.

He had many years of international experience, including working in Switzerland, Austria and London’s Savoy Hotel, and had in depth local knowledge, including being previously the proprietor/chef at the Red Ochre Grill Restaurant, Adelaide.

Andrew also knew, as a fine dining chef, what he would personally require from the branded products.

It was considered that he could clarify and fine tune these requirements with the Melbourne chefs and distributors, and could directly demonstrate the cooking and quality aspects of the fish to the chefs.

**The following methodology was agreed:**

An initial questionnaire would be developed.

This would assist in ascertaining demand drivers from the gatekeepers and assist in developing an appropriate brand anatomy for the Melbourne fine dining market.

The consultant (Andrew) was to contact the industry members in order to determine where the products were presently sold, or were previously sold in Melbourne.

Existing promotional material from the member companies would be gathered.

AMFFA members were to agree as to how product would be generically promoted, and where and how fish samples would be obtained by Andrew.

Andrew was to arrange for product delivery and storage in Melbourne.

Using product assessment methodology agreed by AMFFA members, Andrew would undertake an informal quality audit of product delivered to Melbourne, and confidentially advise the AMFFA members.

Andrew was to:

Identify and visit an agreed number of key chefs from fine dining and other restaurants in Melbourne, plus key media, the Australian Culinary Federation and Les Toques Blanches. This would be undertaken by two trips to Melbourne by Andrew.

Provide a list of Melbourne contact details to AMFFA members.

Obtain comments from those customers/gatekeepers visited about existing promotional material provided as part of the project, with regard to its relevance to their required product features and benefits.

Promote Hiramasa Kingfish <sup>TM</sup> and Suzuki Mulloway <sup>TM</sup> to each chef visited, by outlining the features and benefits of the product and, where possible, providing cooking demonstrations and/or product samples.

Identify the distribution channel to each restaurant, and the chefs' availability to receiving product as directly as possible.

Visit key distributors where identified, identify their requirements and provide them with existing promotional materials.

Advise those visited, that AMFFA member farms in South Australia (in accordance with agreed standards) produce the branded products.

Explain that this project was to promote the products and determine customer requirements.

Obtain comments from those visited on items such as required taste, texture, colour, fat content, food safety, nutritional content, fillet yield required, how they determine “freshness” and “quality”, affordability, availability, volumes required.

Also determine requirements for fish sizes or portion packs; frequency of delivery, range of products sourced; any quality assurance certification required eg HACCP; any requirement for on-line ordering; and long-term consistent purchasing requirements in order that industry could build supply to match demand.

Identify any specific customer requirements for gill tags, temperature recorders etc.

Report on responses and refer all requested trial orders to AMFFA.

Identify and report on which chefs, restaurants and distributors visited, expressed a serious interest in purchasing the product, (or in the case of media, promoting the product).

Identify what part of the supply chain, these gatekeepers would like to visit in South Australia.

Organise a 2 day visit to South Australia for these people to see where the product comes from – addressing the provenance, environment and the “story” of the product.

Produce guidelines to report on lessons learned.

In the context of this report, it was not considered appropriate to provide the names, contact details and comments of individual chefs or gatekeepers.. However, the report provides as much detail as possible, such as Melbourne restaurants contacted, to provide an indication of the market segment, and generic comments which are sufficient to inform the project objectives.

## **PROJECT IMPLEMENTATION**

### **MELBOURNE RESEARCH**

#### **Preparation for the first visit to Melbourne on 12 to 16 October 2004.**

Andrew obtaining promotional material from AMFFA members. Examples are provided at appendix 6.

Andrew and Martin prepared a questionnaire, which was common for chefs, distributors and potential media. (Appendix 3).

This questionnaire was used as a guide to assist Andrew in asking questions to chefs/distributors and potential media etc.

and that The AMFFA members allowed Andrew to complete the questionnaires based on chefs' comments. where necessary, as it was considered that the chefs would not spend time filling in questionnaires themselves.

A list of key chefs, distributors and restaurants were identified and visits organised between 12-16 October 2004.

Andrew was mindful of avoiding meal times in requesting appointments.

If chefs were not available on one date or time, a second appointment time was usually possible to arrange.

Andrew brought supporting brochures with him from Adelaide, to present at the appointment, rather than posting separately, as he could refer to the promotional material in conjunction with the actual fish.

## **Logistical Issues**

### **Getting Sample Product to Melbourne**

Andrew needed to organise individual fish samples for each establishment to be visited, plus he intended to undertake two Chefs Club meetings/presentations.

He therefore needed to organize a holding point at the Windsor Hotel, Spring Street, Melbourne.

The AMFFA companies therefore needed to telephone Andrew with their estimated time of promotional product arrival.

These samples were delivered directly by each AMFFA member to the holding point. It was important that the box samples were carefully marked.

Andrew had a contact at the Windsor, who was extremely helpful in providing extra foam boxes and ice required for the individual deliveries, and the workspace to package up the samples.

He was then able to load up the samples from his storage point in Melbourne each day as he went out to appointments.

### **THE FIRST MELBOURNE VISIT 12-16 October 2004**

#### **Melbourne Restaurants contacted (and visited) included:**

The Windsor, Philippe Mouchel Brasserie, Crown Casino, Coco's, Orita's, Fenix, Park Hyatt, Flower Drum, Grossi Florentino, The Stokehouse, Vue de Monde, Circa the Prince, Le Restaurant, Sofitel Hotel, Hanabashi, Gourmandie, Restaurant Jaques Reymond.

#### **Melbourne Distributors contacted and visited included:**

Clamms Fast Fish, Oceana, Taspak, Ocean Made, Richmond Oyster.

#### **Materials for each visit:**

One whole Hiramasa Kingfish <sup>TM</sup> (HK) was provided as a sample to each establishment visited.

One whole Suzuki Mulloway <sup>TM</sup> (SM) was provided as a sample to each establishment visited. For each establishment - one set of all the available Brochures for each product from each AMFFA member as provided to Andrew.

On average, each appointment lasted for 15-30 minutes, depending on the chef's time available.



Andrew explained the background about AMFFA members to the chef and reasons for the visit.

They discussed the physical appearance, smell and qualities etc. of the fish, and discussed the various points as per the questionnaire.

On all but one occasion, chefs preferred to fillet and cook the fish themselves after the appointment.

Only one establishment had the time to prepare & cook the fish while Andrew was present.

Therefore, it was necessary for Andrew to follow up a few days later by telephone to obtain their comments on the culinary aspects of the fish. This aspect may need to be refined when further promotion is envisaged. One of the benefits of the fish is that it is versatile, and chefs may not be aware of its versatility if left to prepare only one dish after an interview.

### **Chefs Clubs**

Andrew tried (unsuccessfully) to get a presentation opportunity for a meeting of the Victorian Chapter of the Australian Culinary Federation. The Chapter deemed that it was “inappropriate” for the meeting style & venue at the time.

However, an opportunity to present the fish to Les Toques Blanches – Victorian Chapter (another international Chef’s Association) was arranged up for the second visit.

### **Media**

Two journalists were approached regarding the fish, and were interested in the product but were unable to meet with Andrew, and were not able to receive fish samples.

They advised that they were unable to accept any invitations to the proposed Aquaculture Tour in South Australia due to their companies’ “ethical” policies.

Clearly, any promotional strategy involving the media would need to be separately arranged, coordinated and budgeted.

General media presentations were therefore considered to be additional to the scope of this project.

However, AMFFA contacted Sumptuous Magazine, (outside this project) and advertising was arranged which included feature articles.

## **THE SECOND MELBOURNE VISIT November 2004**

### **Melbourne Restaurants contacted (and visited) included:**

Bacash, Mecca Bah, BCoz, MoMo, Livebait, Pearl, Matteos, Donovans, Adelphi Hotel, Melbourne Exhibition Centre, Leandra Functions, Zinc, Crown Casino, Epicure Catering, Spotless Group, Toofeys,

### **Melbourne Distributors contacted and visited included:**

Clamms, Oceana, Taspak, Ocean Made, Richmond Oyster.

### **Chefs Clubs Meetings visited:**

Les Toques Blanches Chefs Club.

The same format was used to visit the chefs and distributors as per the first visit. The Les Toques Blanches (LTB) presentation went well. A number of fish were delivered to the establishment (Hotel Sofitel) hosting the meeting.

The hotel's chefs (under the LTB President's direction) prepared the fish. Andrew was able to circulate amongst the members and guests (some 30 Chefs and F & B Managers), plus other Hospitality Industry people and discuss the fish and seafood supply in general.

The Chefs were impressed by the product and it was agreed to further develop this presentation concept to chefs' associations at an international level.

### **Issues/ Problems**

Andrew found that working alone made deliveries difficult.

He had to find the loading docks of establishments, and then park his car safely in order to return for the appointment.

This was very time consuming and needed to be well planned in a major city such as Melbourne.

Time constraints at individual appointments meant that Andrew could not demonstrate the full versatility of the product, and chefs only had one fish to trial alternate cooking and filleting options.

At the time of this project, the AMFFA companies did not have their own consistent standard size or standard material boxes for samples.

The boxes used also did not promote the brand.

## **RESULTS / DISCUSSION**

### **COMMENTS AND RESPONSES TO THE QUESTIONNAIRES AFTER BOTH VISITS**

It is not considered appropriate within this report, to provide the names of those contacted, and detailed individual responses to the questionnaires from each establishment.

This project confirmed that chefs construct their menus usually on the basis of one third seafood dishes, and two thirds non seafood dishes.

Menus are also changed regularl, and usually at least seasonally.

Therefore any seafood brand attempting to service the restaurant market will be in competition with other food products and seafood products, and will need to be versatile in order to consistently stay on seasonally changing menus.

With regard to AMFFA members' brands, there were some very clear trends emerging from the first round of interviews with chefs and distributors.

Summaries are provided below:

All said prime driver when making purchasing decisions was quality.

The quality and flavour of both products was extremely well received. Quality, texture (whole) and odour rated around 8 - 9/10.

All chefs commented positively on the product appearance.

Most of the very high quality smaller restaurants buy only whole fish.

Most chefs commented on the product size being very good. However, those who had smaller samples commented on smaller size and asked if they could be bigger.

Most chefs particularly commented that kingfish fat content was extremely good. However, it should be noted that fat content is mostly an issue for the Japanese Sashimi restaurant market, and to a lesser degree for western restaurants.

Establishments with a reasonably high volume of trade buy fillets. Several chefs are concerned that fish is often inconsistent in portion size. The product must consistently provide the best yield and value for the chef.

Portion control is mainly only used by establishments with larger volume function trade.

Chefs usually try to use the region of origin when promoting the product and do not usually use manufacturers' names. This could have implications for the use of the terms "Hiramasa" and "Suzuki" if restaurants want to promote the source of the product.

However, everyone interviewed liked the name "Hiramasa Kingfish". A large majority would use the full name on menus.

A large majority of those interviewed suggested using the name "Mulloway", rather "Jewfish" for the Melbourne market. Most liked Suzuki Mulloway, but again, not all would use the full name on their menus as it sounds too Japanese in a French restaurant, so they would just say "Mulloway" which is a generic name, rather than a brand name.

Therefore a distinctive name appeared to be valued more highly than the name actually highlighting its origin, although both were valued.

A name which was both distinctive and highlighted origin would appear to be valued in this market.

Chefs generally perceive fish as being a versatile product offering a range of recipe options. The AMFFA products were perceived as particularly versatile.

All chefs considered that farm and supplier Quality Assurance certification, including environment/feed/traceability etc is important.

They perceive farmed seafood as the future, but more transparency and communication about the way seafood is grown and fed is critical if they are to use farmed seafood with confidence.

However, most chefs did not want to be directly presented with the actual food safety and quality assurance certification detail.

They just needed to know that it was available if and when they needed details.

Gill tagging was viewed important by only around half of the chefs. Most trust their suppliers to only supply the best authentic quality. They assume that an appropriate traceability system is in place.

Almost every establishment has more than one fish supplier.

All chefs trusted, and wanted to deal directly with, their own suppliers and distributors.

Only one expressed interest in dealing direct with the farms.

All had suppliers who deliver 1-2 times per day, all 6 days per week, and a couple 7 days per week.

All required very quick & responsive service from suppliers.

All used a range/variety of seafood/fish/shellfish.

No one was interested in online ordering.

It is therefore evident that aquaculture producers must consider suppliers and distributors as “gatekeepers” to markets, and must view them as customers.

Everyone supported the aquaculture industry in principle, as this was seen to be reducing pressure on wild resources.

However, most of the smaller high quality establishments advised that they would generally prefer small parcels of top quality wild caught fish over aquaculture product.

However, they were happy to use aquaculture product on all other occasions if the quality was excellent.

### **Promotional material.**

Most chefs thought that an A4 size, one page product information sheet that can be filed away was the most effective option.

Chefs did not want much detail in the material as they do not have the time to read.

Bullet point information is required.

Most thought high quality “sexy” food shots were important.

Only a few thought recipes were necessary as chefs were generally capable of preparing the product.

However, it should be noted that if a different market segment was targeted, recipes would be important for retail end consumers who are not confident when cooking fish, and do not realise the versatility of the product.

All chefs thought that a web site supporting the brand, including with more detail, such as photographs, and video clips of the fish, growing, feeding, harvesting and processing procedures.

This would be useful as a good resource to support the product and brand provenance.

### **Determined Characteristics - Hiramasa Kingfish™**

At the time that this project was undertaken, Kingfish was already an established species in Melbourne restaurants. Nearly all Melbourne chefs interviewed by Andrew knew establishments which sold the fish, and most have tried it and like the fish.

This result appears to contradict previous end consumer surveys – who stated that they were not aware of the fish.

However, the end consumers surveyed were not chefs and who presumably purchase fish predominantly at the retail level.

This would again show that different promotional material and strategies would be required for different market segments and customers.

The appearance, quality, odour, texture and flavour of sample products were all extremely well received by chefs.

The sample sizes were particularly well received, as they were perceived to be superior (larger) to other product that has been available in the market in recent times.

Fat content was not a major issue. This was mostly an issue for the Japanese Sashimi Restaurant market, and to a lesser degree for western restaurants. Some choose “fattier” fish only when planning a raw fish dish.

However, if considering features for end consumers, additional fat affects the cooking qualities of the fish and therefore recipe guidance may be required.

Everyone liked the texture and flake of the Hiramasa Kingfish™ product, especially raw. Only a couple of chefs commented that the fish dries out with cooking and prefer it sashimi style. Nearly all believed that it should be served under done, if cooked.

Nearly all said that the flesh colour should be left natural, although a couple liked pink colouration. They commented that some thought could be given to achieving this possibly through the addition of natural algae in the fish feed, They considered that this could possibly be a selling point of difference, as many establishments look for a mix of fish styles on their menus, at least having one white flesh and one red flesh fish to balance the menu.

### **Characteristics - Suzuki Mulloway™**

Mulloway was not as established as Kingfish in Melbourne restaurants. Most chefs interviewed had heard of the fish but less than half had tried it before. Distributors were even less aware.

The appearance, quality, odour, texture and flavour of the Suzuki Mulloway™ product were all extremely well received. Most thought that it was a good clean mild flavour, and compared well to species such as farmed barramundi, salmon and imported species.

The sample sizes (3 kg +) were particularly well received. The few that had used Suzuki Mulloway™ said that they compared well to the Mulloway product that had been available in the market previously.

Many liked the texture and flake, and there were a few positive comments on how moist the flesh was.

Many liked the fish “crisp skin” style. Only one chef commented that the fish dried out and “toughened”. However, Andrew could not demonstrate cooking at this interview, so this result may have been due to the chef’s cooking technique.

However, it is again useful to note that cooking advice may be required for general consumers if promoting the fish in a retail market.

All chefs interviewed preferred to leave the flesh colour natural.

Fat content was not considered so important with this fish, except again for some Japanese chefs. However,

This may be an issue to consider for end consumers as again fat content affects the cooking quality of the fish, and fat content may be perceived in tandem with nutritional content, such as Omega 3 levels.

### **Supply chain -Specifications/Delivery**

Over both Melbourne visits, it Andrew identified that most of the very high quality smaller restaurants buy only whole fish, as they seek perfection, freshness, and the desire to fillet and portion the fish themselves.

However, any establishment with a reasonable volume of trade usually buys fillets as well as whole fish, often depending upon how busy it is at the time.

Mainly, establishments with larger volume function trade require greater portion control.

A couple of chefs in these larger volume establishments preferred portion control fillets, interleaved and layered with plastic sheets, with top & bottom ice packs in small foam boxes, but not heavily vacuum packed.

Some chefs commented that they saw that there would be an increasing demand for this service.

They commented that a standard number of portions per pack allowed easy ordering, and it was very easy for chefs’ staff to pick the portions out of the box for use.

However, chefs advised that vacuum packaging often crushed, damaged or disfigured the portion shapes. They suggested that a backing board may avoid such damage.

For those that buy filleted fish, the idea of special “authentic” plastic sleeves and packaging was supported.

Cutlets were not used by any of the chefs.

All were happy with the standard packaging used of whole fish and the use of plastic wrapped fillets in crushed ice (not cubes) in foam boxes.

However, a couple expressed concern about potential foam particles in food and suggested that AMFFA members may therefore wish to consider alternatives to foam boxes.

The majority of chefs considered that gill tagging was either a good idea or important. The idea of time and date stamped gill tags was enthusiastically received.

Temperature control verification devices were not deemed as necessary.

All perceived farm and supplier Quality Assurance certification as important. None were concerned over the particular type or origin of the certification. The chefs wanted to be assured that the minimum quality standards and practices were being met.

Most chefs trusted their distributors to address this aspect and to only supply the best authentic quality.

### **Supply Arrangements**

Only one chef expressed interest in ordering directly from the farmer.

Some distributors were very concerned about a representative of the farmer directly marketing to restaurants and perceived this as competition.

All chefs interviewed preferred to deal directly with their distributors, who could be there within a half hour if there was a problem.

Excellent speed of service and high frequency of deliveries was essential to the chefs. Some restaurants received twice daily deliveries, even three deliveries if necessary, due to late changes. Some distributors even delivered 7 days a week.

No chef was interested in on line ordering. Generally, only larger establishments (with purchasing departments) would use email ordering. Every chef liked to be able to pick up the telephone and discuss the day's purchase with their distributors / suppliers.

Almost every establishment had a range of fish distributors / suppliers to cater for a range of seafood/fish/shellfish products.

## **DEVELOPING THE BRAND ANATOMY**

### **Product Values & Branding**

#### **Product Names**

All chefs liked the name Hiramasa Kingfish <sup>TM</sup> and a large majority would use the full name on menus. It is a recognised brand already in the hospitality industry (particularly in Sydney), because of previous promotional effort.

Almost everyone suggest using Mulloway, not Jewfish for the Melbourne market. "Jewfish" is a common local term, but was deemed politically incorrect. Around 50-60% of chefs liked

Suzuki Malloway<sup>TM</sup> as a name, and thought that the two brand names (Suzuki & Hiramasa) are a good complementary connection when marketing the two brand names.

They commented that full titles may not be correct for this particular market. The Japanese terms are more appropriate for Japanese sashimi style restaurants, but some establishments (i.e. French or Chinese Restaurants) would not use the Japanese names on their menus due to conflicting cultural styles and themes.

### **Provenance**

Knowing the origin and integrity of the product was essential to all chefs, and equally important for waiting staff as well as chefs.

South Australian product was very highly regarded by all chefs. Waiters would nearly always promote the South Australian origin of seafood and many would nominate the detailed origin (i.e. Fitzgerald Bay or Coffin Bay) on their menu descriptions.

All chefs considered that food safety, traceability and the sustainability with regard to the environment, are important, but most did not need the detail in promotional material. They just wanted to be reassured that best practices are being upheld and to know that the information was available if, and when, they needed details.

Therefore the provenance (where product was produced) appeared to have a greater distinctive value than how the product was produced for the fine dining market.

While this does not differentiate the individual product, it is useful to know that regions can build their own reputations and brand (as in the wine industry).

AMFFA members may consider incorporating this aspect in their branding anatomy.

### **Environmental Values**

All chefs supported aquaculture in so far as the production of farmed fish reduced the pressure on wild resources.

Nearly all of the smaller high quality establishments advised that they would always prefer small parcels of top quality wild caught fish over aquaculture product, but were happy to use aquaculture product on all other occasions if the quality was excellent.

### **Emotional benefits/personality/soul**

All chefs said that the prime drivers in purchase decisions were quality and flavour.

No chefs were really concerned or interested in discussing these questions in the questionnaire as part of a developing brand anatomy.

Only after prompting did they discuss that end consumers valued the luxurious, fashionable aspects of the premium food as part of social eating, and that fine dining was a special treat and had entertainment value.

Differentiating the product from that available in supermarkets may therefore be a beneficial feature.

Other valued features were that the products were Australian, healthy eating and good for the environment. However, many other products also have these attributes.



## **Promotional Material**

The chefs advised that they do not have time to read lengthy promotional material.

Nearly all chefs thought that an A4 page product information sheet that could be filed away was the most appropriate option.

No chef wanted much detail or big paragraphs of writing, requiring only bullet point information.

Most thought that one or two high quality “sexy” food shots were important.

Only a few thought recipes were necessary.

All chefs thought that a web site with more detail, photos, etc. would be a good resource if they ever needed to get more detail and could be used as a good product knowledge or training tool.

## **Distributors**

It was clear that the restaurants prefer to buy from distributors, and that these were undoubtedly the key “gate keepers” to the Melbourne Market.

Restaurants trust distributors to check food safety and traceability issues. The restaurants check the taste, texture and quality. However, some distributors had never personally tasted or sold Mulloway, prior to this project.

Most distributors had limited knowledge of the number of aquaculture farms in South Australia, and their locations, and which farms bred which species.

Some chefs had concerns as to how the South Australian farmed product was being handled in the Melbourne Fish Markets. They wanted to know how suppliers and distributors could deal direct with the farms.

Some distributors had concerns about farms dealing directly with restaurants, and considered that in these instances, farms were directly competing with distributors.

One distributor suggested that AMFFA members needed someone “one the ground” in Melbourne to regularly visit distributors/customers and organise regular promotions.

AMFFA members have used this concept in the Sydney fine dining market, and are considering a similar concept in overseas markets.

## **PROPOSED BRAND ANATOMY**

A brand anatomy for Hiramasa Kingfish™ and Suzuki Mulloway™, is proposed below.

This responds to the drivers identified by customers in the fine dine market and attempts to establish product points of difference.

These may or may not be in order of importance as valued by individual distributors, chefs and restaurant owners who are the “gatekeepers” of the fine dining markets worldwide.

Different aspects will need to be stressed when attempting to access different markets or promoting to end users rather than gatekeepers.

## **SUGGESTED BRAND ANATOMY FOR HIRAMASA KINGISH AND SUZUKI MULLOWAY IN THE MELBOURNE FINE DINING MARKET**

### **PRODUCT FEATURES**

- Consistently Fresh
- Consistent high Quality: Processing methods ensure the highest handling standards and integrity of product quality.
- Consistent year round supply volume.
- Can consistently meet fish size requirements.
- Shelf life appropriate for the target market.
- Provides a good fillet yield and therefore profit for restaurateurs
- Looks good– presents well whole or on the plate.
- Has a distinctive, attractive colour. (Farmed Kingfish has a pale pink flesh colour, lighter than the wild variety).
- High fat content (generally 16-24% for Kingfish - to be confirmed) higher in comparison with wild varieties and other competition.
- It is price competitive with seafood of comparable quality.
- Complies with international food safety standards.

### **FUNCTIONAL BENEFITS**

- Safe to eat
- (NB this is a positive benefit, but supporting the “non negatives” are also important to have available to support the brand. For example safe toxin levels, no antibiotics present, no genetic modification, not irradiated, no additives etc.
- Contributes to a healthy diet. It is very high in proteins, nutrients and vitamins, including Omega 3 and Omega 6.
  - Low in cholesterol. (Supporting evidence required).
  - Excellent taste –has culinary excellence. Excellent tender “rich and creamy” flavour.
  - Firm texture.
  - Easy to cook.
  - Versatile, and can suit various local cuisines. Highly regarded as sashimi or sushi, baked, barbequed, grilled or smoked.
  - Freezing does not detract from its cooking qualities.

### **EMOTIONAL BENEFITS**

- Environmentally friendly. The product and the industry are demonstrably “clean and green”,
- Produced in regional South Australia. Helps the regional and rural communities.
- Product and industry have integrity, transparency and traceability.

### **PERSONALITY**

- “Regal” international status (known in Japan as the “King of Fish”).

### **VALUES**

- Exclusive. Good taste
- High standards
- Reliability.

The promotional material produced as an appendix to this report is intended to support this suggested brand anatomy

## **CHEFS' VISIT TO EYRE PENINSULA**

As part of this project, the Department of Primary Industries and Resources South Australia (PIRSA) contributed to the cost of bringing chefs from Melbourne to visit aquaculture farms on the Eyre Peninsula.

The general itinerary and catering itinerary for the visit are provided at appendix 5 to this report. As a result of the visit, this project has also provided guidelines and things to consider when organising such a visit, provided at appendix 4.

Publicity about the visit in “SA Food Talk” is provided at appendix 6.

These visits needed meticulous planning and coordination, to ensure that the chefs/gatekeepers obtained a “holiday” experience, whilst also experiencing and appreciating the products, the environment and AMFFA members’ capabilities.

It is not appropriate to attempt to show the chefs too much in too short a time. Extensive travelling is tiring and does not result in an overall positive experience.

It was interesting to note that the chefs really enjoyed visiting sea cages and “fishing” from within sea cages. They were impressed by the whole aquaculture production operations as they were able to see the fish being fed, and the overall health of the live fish, both individually and in shoals.

They wanted to see for themselves, the “story” of where the fish came from, rather than regulatory traceability information. This was for them, the element that would distinguish AMFFA members’ product from other products.

This “intangible” or subjective element added significantly, not to just to the Hiramasa Kingfish <sup>TM</sup> and Suzuki Mulloway <sup>TM</sup> finfish brand value, but also to the value of other Eyre Peninsula aquaculture and wine products.

So much so, that this concept has been continued in the development of an Eyre Peninsula brand (see below).

## **GUIDELINES DEVELOPED FROM PROJECT INFORMATION**

### **Supply and Demand**

Aquaculture producers need to identify who will actually buy their product in each market. These are usually “gatekeepers” to market, who are influenced, in turn, by their own customers’ demand drivers.

The gatekeepers to any market, whether the fine dining market, general restaurant market, or retail market need to be identified.

Producers also need to identify how demand is developed within each market.

These demand drivers may not be the same in each market segment.

Gatekeepers have similar, but different product values from the end consumer. For example, a chef will ask a distributor gatekeeper for information on fillet yield, which is a valued point of product difference, but which is not usually considered by an end consumer.

In this project, it is primarily the distributor, and on a secondary level the chef, that are the customers of the producers.

However, chefs can create demand for a product if they are aware of its features and benefits, and can develop “pull through” demand via their distributors.

This demand is driven by the chefs’ awareness of the unique attributes of the product which can be differentiated from competing products.

The chefs interviewed as part of this project, confirmed that they value the regular supply and consistency of farmed product. They advised that they cannot always guarantee either the consistency of volume or quality from imported wild or farmed species.

Therefore, the reliability of the aquaculture producer to balance supply with demand, whilst ensuring overall consistency of quality, are key components of brand development.

Enterprises may need to incur the promotional costs of the initial market development, building demand whilst simultaneously building matching product volume.

Before attempting to access new markets, aquaculture producers should consider whether supplies to existing markets may be adversely affected, and if it is worth potentially damaging existing goodwill and brand image in existing markets.

Entering a new market should only be considered if the business or brand will not be adversely affected and if greater overall profit will be made.

The initial volume of product available for the new target market should be considered, plus how much product could be available in order to continuously service each market. This should be compared to the promotional effort, the number of links in the supply chain, and the control of the supply and distribution chain, particularly if the product is to be exported.

Gatekeepers and customers may need to be better educated as part of the marketing and promotion strategy.

The education process may include making them aware that if they value consistent aquaculture product and supply arrangements, they need to understand that producing large farmed fish is a long-term process, due to the lead in times required to grow the fish.

It is not logical to grow fingerlings if an aquaculture production company has not obtained a probable market and probable price for its product, which will produce a profit after undertaking all the expenses of producing the product.

Chefs may not be guaranteed long term supply if they and their suppliers do not establish long term arrangements with aquaculture enterprises, and waiting until the fish are market size before ordering.

If distributors or chefs always compete on an auction basis to purchase fish when these fish are over 3kg, then the fish will go to the highest bidder, which may be elsewhere.

If supplies are inadequate, they may be left with poorer quality fish which could adversely affect their reputation and profit margins.

Therefore, aquaculture enterprises may need to consider allocating a portion of production specifically for local /Australian customers, to maintain and build Australian market share and customer goodwill, creating stable pricing and balancing the potential variance in prices and costs experienced in export markets.

Small volumes of product for promotional use and initial orders are also expensive to transport.

Therefore, longer term contract arrangements, coordinated as far back as the hatchery, would provide a better guarantee of supply at fixed price points.

Using a coordinated approach to the market also achieves economies of scale.

Chefs should therefore be made aware that producers may want to maintain their export markets whilst also developing domestic markets. Therefore, long term supply arrangements may need to be negotiated to service particular markets.

### **Identify Complementary Market Strategies**

It may be a good long-term strategy to avoid complete saturation of both retail and food service markets, unless separate branding strategies are identified.

This is because there may be a danger that the premium product if not promoted correctly in the retail market, will become known as a “commodity” rather than a delicacy.

If the premium product is confused with product available everywhere in supermarkets, and “over used” in the function/catering sectors, then chefs and fine dining consumers may look for an alternative.

The complementary development of separate markets needs to be a measured consideration.

If the retail market is considered in conjunction with the fine dining market, it is logical that the premium aspect of the brand is maintained.

This strategy could support brand awareness initiatives in the fine dining/food service market, by getting consumers aware and looking for the brands on restaurant menus.

However, a complementary retail strategy could include:

Developing a retail brand which is complementary but clearly differentiated from the premium brand.

Providing a limited selection of the better retailers, on a rolling basis, a few boxes of free product and appropriate recipe flyers and posters to get the general public awareness and sales moving forward.

Develop some promotional portion packs for the retail and supermarket sectors that are self contained “meal solutions”, which are vacuum packed for long life with a recipe/serving suggestions and a sauce/flavouring sachet included.

A series of six or ten varieties could be developed for rotating on a weekly/fortnightly basis.

Develop a range of value added concepts/products for the trim/off cuts, using the by product from the supplies to the Portion Control and Retail pack markets.

Develop for the retail market some well-designed recipe flyers for the home gourmet cook needing quick, healthy, easy meal solutions.

### **The Distribution Channel**

This project has identified that the producer must obtain a detailed knowledge of the distribution channels for his brand within a target market.

Several distributors and other links in the chain add further commissions, double handling and re-packaging costs, which add further to the customer price.

These are sometimes unavoidable, but should be avoided where possible and a coordinated approach developed which provides an economy of scale.

However, going straight to chefs and restaurants without talking to distributors can easily upset people within the existing system, and possibly result in a boycott of the product.

Therefore the producer must be able to differentiate the product in such a way that chefs can demand the product through their existing suppliers, who do not feel threatened that they are being by-passed.

Rather, the distributors should be encouraged because this person is supporting their sales effort.

### **In Market Brand Promotion**

This project used a consultant chef to undertake temporary in market brand promotion and development.

However, in market brand development is long process. Simply promoting at trade fairs and providing brochures is insufficient.

It requires the creation of “pull through” demand from chefs, which is developed by permanent in-market representatives. These in-market representatives should have loyalty to the brand, and educate the gatekeepers and chefs, allowing them to touch, feel, taste and experiment with the product over a long period.

It is insufficient to simply provide the product to chefs without continued back up support, to verify that quality supply is and will be maintained.

However, it should be noted that distributors perceive themselves as the educators of their customers and do not necessarily have loyalties to particular brands. They could be very concerned about a representative of the farmer directly marketing to their customer restaurants and may perceive this as competition.

As a result of the project, the consultant chef, recommended that a brand agent be considered “on the ground” in Melbourne, to facilitate good communication and coordinated cost effective supply lines to all distributors, and also to coordinate promotions, ranging from “Chef’s Table” events/dinners/tastings at different establishments, or even at a distributors premises (as proposed by one Melbourne distributor).

It may be appropriate for an independent person who represents the brand, to undertake this coordinated in-market brand development, rather than an individual distributor.

Existing distributors may not have sufficient motivation to develop an appropriate market share for the brand, in comparison with other brands handled by the same distributor.

Any commission is better paid to someone who is as close as possible to the customer but is also committed to the brand.

### **Control along the supply chain**

Quality control along all stages of the supply chain is vitally important.

The fish may be in excellent condition when it leaves the water, but there are many issues that could arise along the supply chain, and any problems should be picked up before they reach the customer.

This role could and should also be undertaken by an in-market representative who represents the brand, rather than a distributor.

If a problem arises, the distributor may simply drop the brand and use an alternative, whereas an in-market representative should try to fix the problem and maintain market share for the brand.

### **Exclusive Supply**

Some restaurants want to ensure that they can charge an exclusive price for the fish because it cannot be obtained elsewhere. This is part of the exclusive fine dining experience.

Any marketing plan should consider why a restaurant customer would pay a premium price for a product that they could buy in a supermarket.

Using a particular brand name, rather than a species name helps in this regard. Many distributors also ask for exclusive distribution rights.

However, exclusive arrangements may be dangerous if restaurants only buy from their own trusted distributors.

It would difficult for restaurants not serviced by the exclusive distributor, to obtain the product.

In addition, the exclusive distributor must be prepared to work hard to develop your market share and obtain an acceptable price in the market.

Due to the “pull through” nature of this role, and independence required, it may be more appropriate that an independent in-market representative, rather than a distributor undertake a role of developing exclusivity.

### **Ensuring Customers know the Brand and the Product**

Enabling chefs to visit the region where the fish was produced was clearly a success.

This regional provenance made an impression and added to the story of the product.

It is interesting that when the chefs visited the Eyre Peninsula, and they were allowed to cook and taste a range of seafood products from the region, they appeared to accept that the origin of the product itself, and the intriguing “sound” of the local name had a market value.

This was not based upon actually viewing evidence of food safety or nutrient levels, but purely on cooking and tasting the product, in essentially a holiday atmosphere.

It was interesting that the chefs’ best memories of the trip related mainly to holiday type experiences (eg using a fishing rod to catch their own fish in a sea cage, cooking their own food at the barbeque etc).

Nearly all chefs were supportive of developing a “regional cuisine” philosophy in Australia, so using “attractive sounding” regional names may be desirable for the Australian market.

The perceived quality of Hiramasa Kingfish™ and Suzuki Mulloway™ was in part attributed to where they were grown, and additional aquaculture products grown in the region also directly benefited from this assumption.

Therefore it is clear that the brand anatomy of our fish must conjure up memories, stories (or assumptions) about Australia, or a part of Australia in the minds of the diner.

The aim being that an aquaculture-bred fish from South Australia is not the same as one from any other part of the world, even if it is identical in all other respects.

However, this will only be appropriate if the customer knows and recognises the provenance of the fish and the region.

Using only a regional names or parochial seafood names may not work in an overseas market, serving to confuse customers rather than building the brand.

### **Promotion material and Product samples**

This project identified that a consistent size of product should be determined for trial promotion.

The sample should also fully represent the intended final product.

Appropriate consistent size packaging should be available for product samples.

These trial size, and normal boxes should also promote the product brand.

Trial size boxes may be different from normal boxes and may need to be separately manufactured.



If further promotion is required, the producer should consider whether samples will be free or discounted.

If developing a market using discounted pricing, a strategy must be in place and included in the promotion strategy, to obtain the true value of your product.

Supporting promotional material for chefs should be A4 brochures / flyers, rather than detailed documents. These should include salient dot points with high quality photographs of the product.

The producer should consider the use of a website to provide detailed background information.

### **Price and Value Considerations**

Chefs construct their menus based upon their optimal proportion of seafood dishes, which are usually one third of the dishes on the menu. They also change menus generally on a seasonal basis.

Any new premium farmed seafood product may be competing with existing seafood or other food products, and therefore needs to have a high value for the chef and end customer.

Price discounting may be required in order to initially get the new product recognised within a new market. However, the customer must eventually be persuaded by marketing and promotion, to value the product at its full price rather than the initial discounted price.

Some chefs in this project commented that the best produce often went to export markets, and they could not compete with high prices obtained in export markets.

However, they need to be aware that such high prices are needed to cover export and logistical expenses and that local supply may be cost effective to a producer, when compared with fluctuating exchange rates and transport costs.

Melbourne chefs may not necessarily need to pay the same price as other Australian markets because there are lower logistical costs to transport from South Australia.

Recent research undertaken by the Eherenberg Bass Institute (see references), also appears to show that Australian customers are prepared to pay equivalent prices to overseas customers for quality Australian products. This would suggest that price is not the dominant factor for many end customers and consumers.

The promotion of the product must focus on perceived value rather than price per se.

Chefs determine value by working out fillet yield and taste. Larger fish provide a better fillet yield per kilogram than smaller fish, but cost more because of the supply/demand ratio and the inherent risk in growing fish over a long period.

Chefs also may need to be educated and encouraged to use every part of the fish in soups, sauces, bisques etc. They should be aware that all of the fish is safe and nutritious.

In fact, omega three and omega six levels, are higher in what they discard than what they use.

This increased use of the fish will increase its relative value to the chef.

### **Product forms.**

As stated above, high end chefs prefer larger fish (over 3kgs) which they can fillet themselves. (This is one particular market segment).

Other high volume restaurants prefer pre-packaged fillets but are concerned that packaging must not damage the fillets. (Another market segment).

Chefs do not appear to require pre- packaged cutlets, but this may be a product form require in the retail market.

Smaller (plate sized) fish are accepted, but are not as prized as the larger fish. (Another market segment). Smaller farmed fish can taste differently and present differently whilst still having exceptionally high omega levels.

The aquaculture producer must consider whether promoting and supplying smaller fish would affect his other market segments and consider whether receiving a lower price for smaller fish is cost effective because of lower production costs.

A marketing strategy for smaller farmed fish would therefore need to differ from the larger fish, as the demand drivers will differ, promoting the features of specifically plate size fish.

Smaller fish may need to be promoted as a seasonal alternative (as they are only 750g or 1kg at one point in time) or be frozen and distributed to match supply with demand over the whole year.

### **Colour:**

The producer should consider whether the fish meets the customer's requirement for colour. Chefs usually want to provide customers with a choice of red flesh fish and a white flesh fish.

This colour needs to be considered in the context of how the product should be marketed and branded. For example, Asian countries prefer red seafood colours.

Promotion should consider whether the product is to be considered as simply a substitute for another product, or an addition to a broad menu in its own right.

Mimicking a similar colour to an existing species, will not generally differentiate the product in the minds of customers and may not build brand recognition.

However, a major feature of the product should be that safe and appropriate production techniques are always paramount, so that the colour of the fish is as natural and consistent as possible.

However, some flexibility may be possible. For example, farmed kingfish can have a naturally different colouration from wild kingfish because of different feed and production methods.

### **Influencing the Market**

Promotion of seafood to a fine dining market is not an exact science.

In the fine dining market, Food is Fashion. Fashions change.

Menus need to be constantly updated.

Therefore the brand and the product must not be allowed to become “stale” in a marketing sense.

In the fine dining market, a brand feature is its new, trendy image, which must be maintained.

A strategy may be needed to “influence the influencers”, which is designed to keep the product trendy or highly visible in the market place, including the leading establishments, chefs, distributors and media via articles, cooking/radio segments and personalities.

Influencing the influencers could be defined as objectives for an independent in-market representative for a brand (as above), or could be an initiative for a national or regional seafood marketing strategy.

The following actions could be undertaken to influence the market:

Commission a series of “Chef’s Table” type dinners/lunches in Melbourne (or the target market) to promote to the chefs and purchasing managers. Consider having each one hosted by a different gatekeeper who in turn invite their key customers.

Support the Chef associations, such as Les Toques Blanches or Australian Culinary Federation, with product for their meetings or events.

Offer volume based incentives (free product) to gatekeepers who actively support and promote the correct branding and use the official brand packaging, or those that use the correct name on their menus.

Facilitate key journalists or a “star chefs” to come on a personalised aquaculture tour. It would be important here for a national approach, to avoid duplication and repetition.

Target TV programs and hosts such as the Food Lovers Guide to Australia, Master Chef, Out of the Blue, Neil Perry, The Today Show, and Huey’s Cooking Adventures etc.

Firstly to supply them with product for their shows, and secondly to facilitate visits to the producing region for the purpose of filming segments & programs.

Target and facilitate promotional opportunities (offer free delivered product & file vision) on TV cooking programs such as Beat the Chef, Celebrity Ready Steady Cook, Midday & Morning TV shows etc.

Develop a calendar of major food related events in the region (such as Tasting Australia every two years in Adelaide, or Fine Foods in Melbourne.), and ensure that an aquaculture tour is available to the range of very high profile media and chefs and TV personalities.

Ensure that the branded products are saturated throughout the event’s official dinners, cocktail receptions, master classes and demonstrations via sponsorship & donations.

Develop and distribute official literature with a clear strong branding message, a 1-page fact sheet and recipe sheet for wholesalers.

Commission a processor at the source to produce portion control catering packs (such as modules of 10 x 160g portions, 5 packs per carton). Actively promote these or similar in the market to the high volume users.

Develop a “state of the art” web site which has information on the technical aspects of the product, e.g. traceability, testing results, recipes, photographs, video clips of growing/harvesting and cooking tips etc.

### **Complementary Branding**

The results of this project also found that products may not necessarily need to always directly compete with other products, and could actually be complementary.

For example, it was very clear in this project that the chefs visited certainly differentiated between wild and farmed fish, and that many had distinct preferences, one over the other.

Wild and farmed fish have different features, benefits and quality attributes. For example, chefs from smaller upmarket restaurants will often prefer a “pristine wild caught” product, despite possible infrequency of supply and unstable pricing.

This is because it fits with their particular perceived “story” of the product, or philosophy of “organic” or “free range” natural produce.

On the other hand, a far greater majority of establishments, particularly high throughput, are very keen on relying on the regular supply, consistent high quality, and price stable aquaculture product.

Chefs are beginning to realise that a cheaper fish, even a wild caught fish of the same species, does not taste the same, does not have the same provenance, nor have the same quality attributes as a premium farmed product.

Aquaculture product and wild caught product can both extol the virtues of environmentally sustainable production.

In addition chefs valued the generic provenance of South Australian aquaculture product.

Therefore, it would appear that the brand anatomy to specifically sell premium farmed species into fine dining restaurants will be different for aquaculture product than for wild product. However, some features and benefits could be similar and complementary when included under generic regional or Australian branding.

The chefs’ comments from this project may appear to contradict the findings from the National Aquaculture Council (NAC) report “Opportunities for the Development of an Australian Aquaculture Brand”, which stated that end consumers do not appear to differentiate between wild and farmed product.

However, this result would appear to be explained because the NAC report surveyed the end retail consumer as the “customer” and identified differing demand drivers from those that this project identified in the fine dining market, expressed by distributors and chefs.

However, chefs also accepted that the features and benefits of the farmed branded products were complementary to their supply range.

Supplying both wild and farmed product to restaurants can provide a variety of tastes, textures and “stories” within a generic Australian or regional seafood brand, and can ensure overall consistency of supply and quality.

Aquaculture product can therefore be promoted and branded in a complementary role as part of a variety or basket of seafood products.

Although many individual enterprises may be able to service individual markets, they may not be able to provide consistency of supply across a range of markets.

However, if longer term flexible and consistent supply arrangements for complementary products can be developed with distributors, this will go a long way to balancing supply and demand, and increase overall demand for Australian products in domestic and overseas markets.

Consistency of supply of products which have complementary features and benefits may be achieved, by coordination of production and market development across a whole regional seafood industry, using complementary product and generic branding.

## **BENEFITS / ADOPTION**

All AMFFA members have benefited significantly from this research.

AMFFA members identified the gatekeepers to the Melbourne fine dining market for their products.

Originally, it was considered that chefs could have been contacted directly and persuaded to purchase the product. However, it is clear that chefs rely on, and trust, distributors to obtain products as and when needed.

It is necessary to fully understand the personal relationships within the supply chain. It is possible to establish a “pull through” if chefs are impressed by the product.

The brand attributes must be relevant to distributors as well as to chefs. AMFFA members determined that the chefs were interested in quality, taste and fillet yield.

It was interesting that the chefs considered that a brand name would be valued which should be both distinctive and highlighted origin.

Chefs were interested in the “story” or provenance of the product. They were not as interested in detail about health benefits or food safety. This was assumed to be a “given” and did not necessarily differentiate the product. However, they perceive farmed seafood as the future, but consider that more transparency and communication about the way seafood is grown and fed is critical if they are to use farmed seafood with confidence.

Distributors needed to know that food safety and regulatory compliance aspects were in place, and needed to know logistical and supply information.

Price was a secondary issue relating to supply and demand.

It would appear that if goodwill is developed, and quality and supply are acceptable, then within this market chefs would be prepared to pay prices which match the farm gate prices achieved for export product.

Double handling may be avoided if selling to Melbourne, because of its proximity to the South Australia.

It was evident that selling the brand related not only to the product itself, but also to the perceived integrity behind the brand, whether it be at the enterprise or regional level.

It was determined that both Kingfish and Mulloway could compete with other seafood products, but could also be complementary as part of a variety of consistent quality supply of seafood which supported a varied menu.

Therefore, as a result of this project:

Brand anatomy for both species has been developed.

Clean Seas Tuna Ltd as the brand owner has developed a website including photographs of the fish and source of production.

Professional promotional material has been produced (see appendix 7).

Supply boxes used by AMFFA members are now consistent in size.

These supply boxes advertise the species and company brands, so that these brand names are much more recognisable across the whole supply chain.

Partly as a result of this project, alternatives to foam boxes have been considered and appropriately lined food grade cardboard supply boxes have been developed.

The AMFFA members now realise that in-market representatives, who have a clear understanding of the brand anatomy and relevance to their market, are key to establishing and developing a new brand in a new market.

The identification of demand drivers and gatekeepers within various markets has assisted greater market penetration, particularly in Europe.

The members have recognised the value of in-market representatives and targeted promotion, and have further developed the concept of making chefs aware of the features and benefits of the product through Chefs Associations (such as EuroToque).

In- market representatives have now been engaged in the European market.

The June 2009 report by Ehrenberg Bass Institute *Barriers and Drivers of the South Australian Food Service Sector's Purchase of Seafood* found that the top five fish species (penetration rate) used by those interviewed in South Australia included Snapper (73%), Atlantic Salmon (68%), Barramundi (58%), Kingfish (51%) and Tuna (45%).

Quantities used per week are more or less in line with species' penetration, i.e. 17kg of snapper,

19.5kg of Atlantic Salmon, 15kg of Barramundi, 10kg of Kingfish, and 5kg of Tuna.

Market penetration in Australian restaurants generally as a result of this project follows a similar pattern with Hiramasa Kingfish now being a recognised brand.

However, Mulloway does not show in the top five species, and more promotional work needs to be undertaken if this brand is to achieve increased market share.

It should also be noted that this project contributed significantly to the concept that the Eyre Peninsula could develop “Brand Eyre Peninsula”.

Eyre Peninsula Seafood producers and the Eyre Regional Development Board realised that Melbourne chefs visiting the region were interested in a range of seafood products, and that the background story of the product was consistent across a range of products.

Therefore, in 2006, with the assistance of Food South Australia, the Eyre Regional Development Board and Eyre Peninsula Food industry launched “Eyre Peninsula, Australia’s Seafood Frontier” a co-operative marketing brand designed to position Eyre Peninsula’s food industry as a premium region showcasing its world class strengths : environmental sustainability, innovation, pioneering spirit, and premium food products.

A website [www.seafoodfrontier.com.au](http://www.seafoodfrontier.com.au) is presently under construction.

AMFFA members are now considering how their product and enterprise brand, will benefit the regional brand, which in turn will benefit any South Australian and Australian Seafood Brand.

## **FURTHER DEVELOPMENT**

Much work still needs to be undertaken to identify demand drivers and gatekeeper requirements in different markets.

Feedback from distributors in overseas markets is that in order to compete in the fine dining markets, branding must adequately reflect unique brand features and benefits. For example, using the common local term “Jewfish” for Mulloway in Melbourne, does not adequately reflect the uniqueness of the product. The species is also used in South Australia as “butterfish” in fish and chip outlets.

A balance must be made between using known terms such as “Jewfish” against using an unknown species brand name, to show that this is not a completely new untried product, but it does have unique features.

Product branding in fine dining markets must satisfy gatekeepers or customers that this is not the same fish that one could buy in the supermarket or fish and chip shop.

Similarly, the term “kingfish” on its own does not adequately differentiate the product.

AMFFA members noted that Mulloway is still not as recognised as Kingfish, either in local markets or overseas, and the product requires greater promotional effort in order to build customer awareness of its unique features and benefits.

However, AMFFA members may also need to determine whether Japanese terms within product branding adequately reflect all the features and benefits that they want to promote to

customers. For example, in overseas markets, customers must be aware that these are Australian, not Japanese products.

At the national level, the whole seafood industry could benefit if projects could identify in which areas products can be appropriately differentiated, whilst also identifying complementary features and benefits, which clearly align them with other Australian seafood products.

Clean Seas Tuna Ltd (an AMFFA member) is now a member of the Australian Seafood Co-Operative Research Centre, which is now undertaking projects which is addressing various market access, market development and value adding issues.

Clean Seas Tuna Ltd is also now a member of the EyrePeninsula <sup>TM</sup> Brand.

As a result of contacting Les Toques Blanches – Victorian Chapter as part of this project, AMFFA members now have an agreement with Euro –Toques International, whereby AMFFA members products will be showcased within this European International Chefs’ Association, using the branding principles, partly established through this project.

However, it appears that a coordinated industry approach will be required in order to further understand consumer requirements, gatekeeper requirements, and market access barriers within individual markets.

Branding and promotion will differ depending upon market requirements, the nature of the product, and whether it is a new product in a new market, a new product in an existing market, an existing product in a new market, or developing an existing product in an existing market.

However, such coordinated approaches are now being developed.

Seafood Services Australia has established a Seafood Trade & Market Access Forum for seafood industry members, and an industry alliance has been formed named Seafood Experience Australia with the aim of promoting sustainable Australian seafood.

AMFFA members and the whole seafood industry are now aware that they need to educate consumers and gatekeepers about how Australian seafood can meet their requirements.

## **PLANNED OUTCOMES**

Project results have been disseminated to AMFFA members and members of the seafood industry.

AMFFA members will continue their agreement with Euro –Toques International, whereby their branded products will be showcased within this European International Chefs’ Association.

Clean Seas Tuna Ltd and Southern Star Aquaculture Pty Ltd (as members of AMFFA) have taken into account the branding, promotional and supply chain issues identified in this project when developing domestic and international marketing and production strategies for their products.



These issues have also been taken into account by other projects undertaken by Clean Seas Tuna Ltd via the Seafood Co-operative Research Centre, particularly market research for the domestic, USA and European markets for yellowtail kingfish.

This project also in part, identified that there could be potential critical capacity gaps in product development and value adding. The Seafood CRC and South Australian Research and Development Institute (SARDI) have also recognised these potential gaps and are therefore involved in developing a Seafood Productivity Improvement Centre, with a view to engaging a seafood technologist and developing strategies to fill those gaps.

The Seafood CRC has also recognised the need to listen to consumer requirements in various seafood markets, when establishing its Retail Transformation Initiative. This initiative will identify consumer barriers and triggers of retail seafood purchases and recognises that these can be somewhat different from those triggering fine dining purchases.

The results of this project may also be taken into account by the National Aquaculture Council, when developing its national strategies, and by other ventures attempting to establish Australian Seafood brand recognition, such as Seafood Experience Australia.

## **CONCLUSION**

“Gatekeepers” are key traders and that their behavior is predominantly driven by the achievement of margins. However, an increased price and therefore margin, could be achieved if these “gatekeepers” were better educated in the features and benefits of the products that were valued by chefs and end consumers.

Establishing either a new brand in an existing market, or an existing brand in a new market, have significant elements of risk.

However, establishing a new brand in a new market can entail an even higher level of risk, and entails a great deal of promotional effort.

It is therefore necessary to research the features and benefits of the brand and determine their relevance to the market, before undertaking costly promotional activity, and the establishment of in- market representation and supply chain structures.

This project has established guidelines based on the principle of “lessons learned” which highlight the need to know your product, but more importantly know who your customer is, and what they value.

World demand for seafood is outstripping supply, which means that the Australian Marine Finfish Farming industry and the aquaculture industry generally, has the potential to become a major industry.

However, this growth depends on targeted promotional strategies which match customer demands with supply features and benefits.

The outcomes of this project will assist the industry obtain the profits that quality seafood can obtain if it delivers on its brand promises.

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## **Appendix 1**

### **Intellectual Property.**

Note that all promotional material and photographs included within this report are copyright protected and owned by Clean Seas Tuna Ltd. PO Box 159, Port Lincoln, South Australia, 5606.

The names Hiramasa Kingfish <sup>TM</sup> (HK) and Suzuki Mulloway <sup>TM</sup> (SM) are protected trademarks owned by Clean Seas Tuna Ltd.

## **Appendix 2**

### **Staff involved in this project:**

Andrew Fielke, of Andrew Fielke Enterprises.

Martin Hernen, Executive Officer, Australian Marine Finfish Farmers Association Inc

Staff of Clean Seas Tuna Ltd including Hagen Stehr AO and Marcus Stehr

Staff of Southern Star Aquaculture Pty Ltd including Lyndon Giles

Staff of South Australia Aquaculture Management Pty Ltd including Phil Hart

### Appendix 3. The Survey Questionnaire provided to Chefs for comment.

<b>Hiramasa Kingfish - Characteristics</b>	<b>Comment</b>
Appearance (Clear eyes, glossy skin, etc) –	
Quality (Good form, no imperfections) - define	
Odour (Lack of odour, taint etc)	
Texture - raw (Firm, unyielding?)	
Fat content (Good layer of fat, how do you asses?)	
Size (too big/small)	
Flesh colour (natural or pink tinge)	
Texture – cooked (Firm, soft, flaky?)	
Flavour (Describe it, how does it/should it compare with Wild caught?)	
<b>Suzuki Mulloway - Characteristics</b>	<b>Comment</b>
Appearance (Clear eyes, glossy skin, etc)	
Quality (Good form, no imperfections) - define	
Odour (Lack of odour, taint etc)	
Texture - raw (Firm, unyielding?)	
Fat content (Good layer of fat, how do you asses?)	
Size (too big/small)	
Flesh colour (natural or pink tinge)	
Texture – cooked (Firm, soft, flaky?)	
Flavour (Describe it, how does it/should it compare with Wild caught?)	
<b>Specifications/Delivery</b>	<b>Comment</b>
Whole fish(Size, gut in/out, scaled, quantity per ctn?)	
Cutlets (Size, Port. Control, quantity per pack?)	
Filletts (Size, skin on/off, quantity per pack?)	
Portions (Size, skin on/off, quantity per pack?)	
Packaging (Chilled, individual, IQF, foam box/ice?)	
Date/time stamped gill tag	
Temp. Control - strip/verification	
QA certification	
<b>Supply Arrangements</b>	<b>Comment</b>
Current Supplier(s) (contracted, why that one?)	
Frequency of delivery (Times per week?)	
Speed of service	

Price – (what are you paying/what’s fair?)	
Range of fish sources/suppliers	
Payment terms	
Supplier QA certification (important?)	
On line ordering?	
Volumes/demand	
<b>Product Values</b>	<b>Comment</b>
Name - Hiramasa Kingfish suitability (what is important)	
Name - Suzuki Jewfish/Mulloway suitability (what is important?)	
Feed/environment (Hormone & chemical-free)	
Nutrition (health benefits, customer perceptions?)	
Fat content (Why is fat important, how do you assess?)	
Type of Fat (Omega 3, good & bad cholesterol – is it important – is it a selling point?)	
Colour of Flesh (natural preference only or manipulated)	
Aquaculture versus Wild caught preference – sustainability values.	
Food Safety (What is valued and what evidence is valued? Is HACCP certification only required? However, only covers bacteria. What about Dioxins/PCB’s, metals etc. Would you value other certification from the State Government?)	
Traceability - what is valued? (Feed content, Safety RE hormones, GMO, chemicals, metals, dioxins, PCBs etc?)	
Origin (is the SA origin of value?)	
What are your customer’s values? (Eg Healthy living, safe to eat, sustainability etc.)	
Personality (What personality are you aiming for? Social eating, entertainment value, fashionable food)	
Emotional Benefits (Do you value the luxurious aspect of the food/it’s a special treat- can’t buy it in supermarkets/guilt free, clean and green?)	
Soul (What do you value as the essence of the brand? i.e. Quality and health benefits for humans and the environment?)	
<b>Promotional Material</b>	<b>Comment</b>
Kingfish - SAAM	
Kingfish - Cleanseas	
Kingfish – Southern Star	
Jewfish/Mulloway Cleanseas	
Format (what is useful for you?)	

Product Info (HACCP, ISO Standards, Fact sheets, web site?)	
Nutrition (enough info, what's missing?)	
What other information is important?	
<b>Specifications</b>	<b>Comment</b>
Whole fish (Size, gut in/out, scaled, quantity per ctn?)	
Cutlets (Size, Port. Control, quantity per pack?)	
Filletts (Size, skin on/off, quantity per pack?)	
Portions (Size, skin on/off, quantity per pack?)	
Packaging (Chilled, individual, IQF, foam box,ice?)	
Date/time stamped gill tag	
Temp. Control - strip/verification	
Product Info ( HACCP,ISO, Fact sheets,web site)	
<b>Supply Arrangements</b>	<b>Comment</b>
Current Supplier(s) (contracted, why that one?)	
Frequency of delivery (Times per week?)	
Speed of service	
Range of fish sources	
Payment terms	
QA certification (important?)	
On line ordering?	
Volumes/demand	

## **Appendix 4 AQUACULTURE TOUR GUIDELINES**

### **Recommendations for the Planning and Delivery of a successful tour**

#### **Define the Region and its highlights: -**

Decide on the best highlights and points of interest that will most likely appeal to the potential guests, and which showcase the required aspects of the industry

#### **Define the type of Guest that will be targeted: -**

Key “Gatekeepers” or distributors/agents

Leading Chefs from a variety of establishments, large 5 star Hotels, Convention Centres, Catering Firms, Hotel/Pub chains, restaurants, Flight Catering Centres, etc.

Food & Beverage Managers

Food Purchasing Officers

#### **Establish the desired outcomes of the visit: -**

Improve understanding of all aspects of the industry and its processes

Increase knowledge and appreciation of the species it produces.

Inspire, excite and encourage greater sales & use of the products

Gather intelligence on the Brand acceptance/ recognition/relevance etc.

Establish and improve loyalty with the customers/guests

Seek input from the Aquaculture farmers/operators/industry stakeholders as to their desires and anticipated outcomes.

#### **Establish an Itinerary: -**

Seek input from the potential invitees as to the content, time frames and availability on certain dates before finalizing the itinerary and setting a date.

Ensure as best is possible that the dates are not clashing with other major events or busy periods for the invitees and hosts that are involved.

Seek input from the Aquaculture farmers/operators/industry stakeholders as to the content, time frames and availability on certain dates before planning and setting a date. Also discuss with them the best visual and interactive or “hands on” components of the experience, which can really make a difference and lasting impression to the guests

Ensure transport used is of a high standard and of a suitable size and capacity (i.e. not under powered), and that connections are as flexible as reasonably possible

Balance the itinerary with the objectives and sites visited in mind so that there is some variety (i.e. not too much of the same thing, one after another).

Mix up the pleasurable active events (local attractions and wineries/restaurants/pubs of note, fishing/swimming/sailing/surfing, visiting related production facilities) with some of the more formal or “sit down” presentations or lectures.

Consider the guests’ comfort and safety at all times, and especially in your planning for inclement weather. (i.e. Warm clothing, life jackets, footwear.)

Allow extra time (a cushion) between components for unexpected delays.

Keep formal sessions short and focussed.

Choose a good host for the tour – someone who can talk with the target group on their level, is preferably known and respected by them, is well organised and has a friendly outgoing nature.

Ensure meals and beverages are of the highest standard and are carefully planned to avoid repetition. Casual and interactive styles of service are most likely to be more successful, depending on the occasion and venue.

Ensure beverages are carefully selected to compliment the special products and are plentiful in supply. Food & Beverage content should be planned by a respected/qualified professional.

Ensure special products which are the features of the tour are at their peak condition for tasting and are beautifully displayed in generous quantities

Get the host to initiate initial contact in person or at least personally on the phone, and follow up with a “hard copy” invitation.

Follow up invites soon after being sent out

Get a firm commitment in writing if possible, and make the guests aware their names are on conference flight reservations etc.

Confirm all bookings & reservations in writing, and double check verbally a few days prior to the event.

Follow up with a reminder phone call to double check commitment around a week before the event.

### **Delivery of the Experience: -**

Host to greet the guests at the earliest possible point and facilitate transfers, luggage, etc.

Keep to the timetable as best as possible, advise future sectors of the tour if there are any delays

Always ensure the guests have generous food & beverages

Consider a parting gift to all attendees, perhaps a “take home pack” of the products

### **Follow Up: -**

Consider a “questionnaire” or comments form for the guests to complete at the end of the tour, seeking their opinions/comments on their experience

Conduct follow-ups personally via phone and in writing shortly after the Tour.

Establish a measure on sales (and any other aspect of interest) before and after the event to ascertain the effectiveness of the Tour.



## Appendix 5

### MELBOURNE CHEFS, EYRE PENINSULA VISIT ITINERARY Distributed to Participants

**This is a very special opportunity to visit “state of the art” Aquaculture operations in the pristine waters of South Australia’s internationally renowned Aquaculture facilities.**

**Situated on the beautiful Eyre Peninsula, you will be hosted by SAMFFA and Primary Industries of South Australia, and will sample some of the best seafood and wines in Australia.**

**A trip not to be missed!**

#### **Sunday 3rd April 2005 –**

- **7.10am – 8.00am – Flight - Mel – Adl. Electronic tickets sent out. Please have photo ID available at the airport.**
- **8.-05 am Meet Andrew Fielke and Martin Hernen at Adelaide domestic terminal.**
- **9.10am - 9.55am – REX Flight - Adl – Whyalla Airport**
- **10.00am Pick up at airport by Lincoln City Coachlines Mini bus**
- **10.30am Arrive Fitzgerald Bay – 12.30pm — view Kingfish feeding etc. at SA Aquaculture Management and Southern Star cages on water at Fitzgerald Bay.**
- **12.30 – 1.30pm - Kingfish Lunch**
- **1.30 – 3.30pm – travel to Arno Bay**
- **3.30 – 4.30pm – Visit Stehr Group hatchery.**
- **4.30 – 6.00pm – Travel to Pt. Lincoln**
- **6.00 – 7.30pm – Check in to accommodation at Limani Hotel**
- **7.30 – 10.00pm – Mulloway Dinner at Hagen Stehr’s residence (walking distance)**

#### **Monday 4th April 2005 –**

- **Continental breakfast available in rooms**
- **6.30am Leave Limani Hotel by Lincoln City Coachlines Mini bus**
- **Leave wharf 7.00am to view Kingfish, Mulloway and possibly Tuna cages at Port Lincoln. Hosted by Ross Gordon and Rick Emes of Stehr Group.**
- **Return to wharf 11am**
- **Coach from Wharf to Limani Hotel to check out. Leave Limani by coach at 11.45 am.**
- **12.00 – 1.30pm – BBQ Lunch at Boston Bay Winery.**
- **Leave 1.30pm. 15 minutes to Airport.**

- **2.00 – 2.45pm – Flight Pt Lincoln to Adelaide**
- **4.05 – 5.50pm - Afternoon flight Adelaide to Melbourne**

#### **ATTENDEES**

##### **CHEFS FROM THE FOLLOWING RESTAURANTS:**

**Chef Banquets. Crown Casino Complex.**

**Zinc Restaurant.**

**Donovans.**

**The Stokehouse.**

**Vue de Monde.**

**Melbourne Exhibition Centre.**

**Epicure Catering.**

**Toofey's.**

**Orita's Restaurant.**

##### **SEAFOOD DISTRIBUTORS:**

**Clamms Fast Fish**

**Tasmanian Pacific.**

**Richmond Oyster**

**CQ Foods**

##### **OTHER:**

**Martin Hernen, Executive Officer, Australian Marine Finfish Farmers Association Inc**

**Andrew Fielke, Consultant chef.**

**Deann Stevens, Communications Manager, Food SA**

**Trudy Huczko, Manager, Industry and Business Development, Seafood, Food SA**

**Rosie Boehm, photographer**

**It is envisaged that because of the tight timeframes, discussions, questions and requirements about the products and processes will occur informally at the various meals, or visits.**

**Martin Hernen will record appropriate comments in order to provide feedback to the industry.**

**Martin Hernen**

**Executive Officer**

**Australian Marine Finfish Farmers Association Inc**

**Mobile: 0401 737 255**

**MELBOURNE CHEFS & DISTRIBUTORS VISIT TO EYRE PENINSULA  
FOOD ITINERARY**

Ph (08) 8344 4343 or 0412 109 003 Email [afielke@optusnet.com.au](mailto:afielke@optusnet.com.au)

**Whyalla – Kingfish Lunch**

- Sashimi KF with Soy, Wasabi, Pickled ginger
- Seviche of KF
- Smoked KF Dip with crusty breads & crudités
- Deep fried KF Sushi (in Nori)
- KF in Saltbush Dukkah Crust – raita
- Fresh fruits

**Arno Bay – Afternoon Tea**

- Coffee & Tea
- Biscuits
- Fruit

**Pt Lincoln – Stehr residence - Mulloway Dinner**

- Crusty Bread with Caramelised Balsamic
- Sashimi Mulloway and Tuna with Finger Lime “Caviar”
- Green Curry of Mulloway Wings with Rice noodle and water chestnut
- Crisp Skin Mulloway with Verjuice Sea Parsley Beurre Blanc
- Char grilled KF with Mango, Lemon Aspen, Coriander Salsa
- Cheeses with Aniseed Myrtle Figs and crispbreads
- Quandong Crumble Pie with Ice cream

**Pt Lincoln – Boston Bay BBQ Lunch**

*Raw Seafood Display on ice boat – large octagonal BBQ for cook your own interactive fun*

*First Course cooked by Abalone diver on BBQ*

- Stir fry Garlic & Herb Abalone

*Main Meal – self serve from display and cook yourself (chefs utilise their own skills)*

- Local Oysters, Prawn tails, mussels, scallops, crayfish, squid, leather jacket cheeks, Kingfish, Mulloway

*Cooking applications:*

- BBQ, Chinese Steamer, Asian fragrant broth

*Condiments:*

- Spring onions, bok choy, beans sprouts, fresh herbs, chopped garlic, ginger & chilli, soy sauce, butter, olive & sesame oils, fish sauce, nam prik, etc. etc.

- Fresh fruits, Cheese and biscuits.

## Appendix 6 - PUBLICITY relating to Chefs' Visit

### *Seafood promotion aims to hook Melbourne chefs and distributors*



Melbourne's leading chefs and seafood distributors were given a taste of South Australian seafood as part of a showcase of the Eyre Peninsula's aquaculture industry.

The South Australian Marine Finfish Farmers Association and [Food South Australia](#) hosted the Melbourne contingent for a two-day visit to the West Coast in early April to show them the region's burgeoning Hiramasa Kingfish and Suzuki Mulloway aquaculture industries.

South Australian Marine Finfish Farmers' Association Executive Officer Martin Hernen says the promotion highlighted the pristine environment and world-class handling practices used by the aquaculture industry.

"South Australia is the first place in the world to grow Hiramasa Kingfish™ and Suzuki Mulloway™ from hatcheries, producing premium products rich in omega oil," Mr Hernen says.

"Our existing customers are impressed with key attributes of the fish, which are superior taste and texture, and we want to position our industry as a supplier of premium Hiramasa Kingfish™ and Suzuki Mulloway™ in the long term.

"In the next 6 months large quantities of South Australian Hiramasa Kingfish™ and Suzuki Mulloway™ will be ready for the market.

"By bringing the chefs and distributors to the Eyre Peninsula we're building relationships with the decision makers with the end goal of supplying our superior products to interstate markets like Melbourne.

"This familiarisation trip also helped finfish farmers understand what exactly the chefs and distributors want in terms of fish sizes, cuts and packaging."

In addition to visits to Hiramasa Kingfish™ and Suzuki Mulloway™ farms near Whyalla and Port Lincoln the 14 member contingent was shown oysters, mussels, tuna, abalone and yabbies produced in the State.

On their visit to Boston Bay Winery the chefs and distributors tasted locally produced wines and were given the chance to 'trial' a variety of seafood by cooking their own lunch.

Adelaide-based consultant chef Andrew Fielke travelled with the group, showcasing local seafood at a number of lunches and dinners.

**Want to know more?** Contact: Martin Hernen, South Australian Marine Finfish Farmers Association

p +61 883261527. e [mhernen@optusnet.com.au](mailto:mhernen@optusnet.com.au)

[Food Talk, Winter 2005 \(Issue 20\)](#)

<http://www.safoodcentre.com/foodtalk/pages/news/news150605/>

## Appendix 7 -Promotional Material



**CLEAN SEAS**  
SPENCER GULF • SOUTH AUSTRALIA

# hiramasa | kingfish



kingfish fillet <sup>▲</sup>

### DELICIOUSLY VERSATILE

In a time of fishery quota reductions, shrinking fishing grounds and environmental concerns, the Hiramasa Kingfish offers you a diverse, practical alternative 52 weeks a year.

Bred in a controlled hatchery environment and grown in the pristine, unpolluted waters of a country with some of the most stringent environmental controls in the world, the Hiramasa Kingfish is a top quality product you can trust.

The Hiramasa Kingfish is high in omega-3 and omega-6 polyunsaturated fattyacids (246mg/100g); up to 50% higher than found in Atlantic Salmon. They also have low levels of cholesterol (24mg/100g), and are an excellent source of protein (22%).



kingfish sashimi <sup>▲</sup>



cutlet portions <sup>▲</sup>



<b>COMMON NAMES</b>	Australian Yellowtail, Goldstriped Amberjack, Yellowtail Amberjack and Hiramasa
<b>SCIENTIFIC NAME</b>	<i>Seriola Lalandi</i>
<b>FLESH/MEAT</b>	Firm texture with few bones. White to pinkish color.
<b>TASTE</b>	Distinctive, subtle, non fishy taste and aroma
<b>FAT CONTENT</b>	Typically 18-25%. Changes seasonally from low in mid-Spring to high in Autumn/Winter.
<b>BROOD STOCK</b>	Reared and maintained in 'CleanSeas' state-of-the-art hatchery.
<b>FEED</b>	Dry, extruded pellets specifically formulated for Hiramasa Kingfish. LAP and GMO free.
<b>ENVIRONMENTAL</b>	CleanSeas is the only aquaculture company in the Southern Hemisphere ISO14001 Certified (The Highest International Environmental Certification).
<b>ANTIBIOTICS USED</b>	None
<b>AVAILABILITY</b>	Year round
<b>HARVEST METHOD</b>	Low stress harvesting. Live fish are bled then salt water chilled to preserve maximum freshness.
<b>PROCESSING</b>	From ocean pens to HACCP and EU Certified plant
<b>PRODUCT FORMS</b>	Fresh and frozen, Fillet, G/G and H/G
<b>FRESH SHELF LIFE</b>	Conservatively 7-10 days from delivery
<b>FRESH DELIVERY TIME</b>	West Coast approximately 60 hours, East Coast approximately 66 hours.



grilled kingfish skewers with rocket salad



kingfish sushi



kingfish cutlets with coconut & lime dressing

PROUDLY PRODUCED BY:



PO Box 159  
 Port Lincoln, South Australia 5606  
 tel: +61 8 8682 2922  
 fax: +61 8 8682 5090  
 email: [stehr@stehrgroup.net](mailto:stehr@stehrgroup.net)



STG12024NH (2)



<b>COMMON NAMES</b>	Mullet, Jewfish, Butterfish, Suzuki Seabass
<b>SCIENTIFIC NAME</b>	<i>Argyrosomus blolepidotus</i>
<b>REGION OF ORIGIN</b>	Arno & Boston Bays, Spencer Gulf, Great Southern Ocean, South Australia
<b>AVAILABILITY</b>	Year round. Higher fat content in Winter (June - September)
<b>SIZES</b>	500g - 1kg, 1kg - 2kg
<b>HEALTH BENEFITS</b>	High in Omega-3 & Omega-6, reducing the risk of coronary heart disease by lowering blood pressure and cholesterol.
<b>FAT CONTENT</b>	Winter 17 - 20% Summer 15 - 18%
<b>BROOD STOCK</b>	Our own hatchery raised fingerlings grown in the cold waters of Spencer Gulf, South Australia
<b>FEED</b>	Bio-dynamic, GMO free & land animal product free
<b>HARVEST METHOD</b>	Low stress harvesting, Live fish are bled then salt water chilled to preserve maximum freshness.
<b>FLAVOUR</b>	Summer: mild, rich sweet and clean Winter: rich, sweet and full flavoured
<b>APPEARANCE</b>	Silver, scaled fish with a pleasant presentation
<b>TEXTURE</b>	Medium firm, tight grained flesh
<b>ENVIRONMENTAL</b>	Cleanseas is the only aquaculture company in the Southern Hemisphere ISO14001 Certified (The Highest International Environmental Certification).
<b>ANTIBIOTICS USED</b>	None
<b>PROCESSING</b>	From ocean pens to HACCP and EU Certified plant
<b>PRODUCT FORMS</b>	Fresh and frozen, Fillet, G/G and H/G
<b>FRESH SHELF LIFE</b>	Conservatively 9-12 days from delivery

mullet cutlet portions



▲ mullet sushi



▲ mullet sashimi

PROUDLY PRODUCED BY:



PO Box 159  
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STC02000001



**CLEAN SEAS**  
SPENCER GULF • SOUTH AUSTRALIA



# suzuki | mulloway



mulloway fillet <sup>▲</sup>



▲ panfried crispy skin mulloway



mulloway sushi <sup>▲</sup>

## AUSTRALIAN TASTE SENSATION

The Suzuki Mulloway is a natural inhabitant in the seas of South Australia. The Suzuki Seabass is a species also found in Japan.

A prized Sashimi fish, the Suzuki is regarded as the finest of the Seabass Species by Japanese Sashimi Chefs.

Fed by the cold, saline rich waters of the Australian Southern Ocean, the growing conditions of the South Australian Spencer Gulf are recognised for their pristine natural environment. The company complies to the strictest environment management practices for the protection of the marine habitat and the sustainability of clean and green growing practices. Cleanseas is ISO14001 certified.

The Suzuki Mulloway is particularly suited to Sashimi frying, roasting and stir-frying in cooked preparations.



# FACT | SHEET

AUSTRALIAN BORN • JAPANESE QUALITY • CULINARY EXCELLENCE



SEARED HIRAMASA | KINGFISH FILLET



WHOLE HIRAMASA | KINGFISH



**FISH NAME**  
Hiramasa Kingfish, *seriola lalandi*

**ORIGIN**  
Fitzgerald Bay, Great Southern Ocean, South Australia

**THE GROWING ENVIRONMENT**  
The fish are hatchery raised & grown in sea cages in the pristine marine environment of the Great Southern Ocean. Feed is biodynamic - land animal product free.

**HARVESTING**  
Fish are stunned by a pneumatic gun & gill plate bled for premium flesh quality

**PROCESSING & PACKAGING**  
Using the best practice for minimal handling to ensure the greatest shelf life, HACCP, EU, FDA approved.

**THE FISH**

Average size	3 - 4 kg
Fat content	19 - 25%
Flesh colour	White to pink
Texture	Firm, broad flaked
Flavour	Sweet rich, clean

**YIELD**

Gilled & Gutted	87%
Japanese Fillet (wing -on)	67%
Fillet - Skinless	48%

**WHY USE FARMED HIRAMASA KINGFISH?**

- Consistent quality, size and flavour
- High in fat
- Great for food costs
- Sustainable fishery

**CULINARY APPLICATION**  
A prized Sashimi fish, the Hiramasa is regarded the finest of the yellowtail species by the Japanese Sushi Chef. Due to the high fat content of the Hiramasa its suitability to both raw and cooked applications are unrivalled, hence lending itself to Western cuisine applications.

**Tail Fillet**  
Tartare, maki, grill, pan fry, cure, smoke

**Shoulder Fillet**  
Sashimi, sushi, grill, roast, pan fry, bake

**Belly Fillet**  
Steam, poach, sashimi, sushi, grill, roast, cure, smoke



PRODUCED BY SOUTH AUSTRALIA  
AQUACULTURE MANAGEMENT  
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020197302

## HIRAMASA | KINGFISH



FITZGERALD BAY, SOUTH AUSTRALIA



## *Chargrilled Kingfish with Stir Fried Asian Greens*

Preparation time: 10 minutes    Cooking time: 15 minutes    Serves 4

### **Ingredients:**

4 x 170g kingfish fillets  
2 tblsp oil  
1 tsp garlic, crushed  
2 tblsp BBQ sauce  
2 tblsp soy sauce  
1 tsp sesame oil

### **Asian Greens**

1 bunch bok choy, sliced diagonally  
1 broccolini, sliced diagonally  
6 spring onions, sliced diagonally  
2cm piece of fresh ginger, grated  
2 cloves garlic, crushed  
2 tblsp oyster sauce  
(Soy & oyster sauce may be replaced  
With sweet chilli sauce & honey)

### **Method:**

1. Pat the kingfish fillets dry and place into a shallow non metallic bowl.
2. Blend the oil, garlic, bbq sauce and soy sauce together in a small bowl and Pour over the fish. Allow the fish to marinate 5 to 10 minutes. (Not more than 30 minutes).
3. Place a griddle pan over a medium heat and pre-heat 2 minutes. Brush or spray the surface with a little oil. Place the kingfish fillets onto the griddle pan and cook 3 minutes each side, brush fillets occasionally with marinade.
4. Whilst fish is cooking heat oils in a non stick wok and stir fry the vegetables 3-4 minutes.
5. Make a well in the centre of the vegetables and pour in the combined sauces & Ginger, toss the vegetables well.
6. To Serve: Arrange the vegetables evenly in the centre of 4 serving plates and top With char-grilled kingfish fillets. Serve immediately.

### **Cooking:**

This succulent deep sea fish is perfect baked, barbequed, grilled or fried. It is also superb in curries, sashimi and sushi.

### **Storage:**

Fresh fillets will keep for 10 days if refrigerated at 0-4°C. Kingfish is highly suitable For freezing.

- ✓ **High in Omega 3 & 6**
- ✓ **High in Protein**
- ✓ **Low in Cholesterol**

## Summer Salad of BBQ Kingfish with Spicy Lime Dressing

Preparation time: 10 minutes    Cooking time: 15 minutes    Serves 4

### Ingredients:

4 x 170g kingfish fillets  
2 tsp morocan seasoning  
2 tblsp oil  
1 cup natural yoghurt  
Wedges of lime to serve  
Crispy fried shallots for garnish

### Salad:

1 sml cos lettuce, washed  
100g wild rocket leaves  
1 avocado, peeled & sliced  
1 continental cucumber, chopped  
1 punnet grape tomatoes, halved

### Dressing:

Rind & juice of 2 limes  
1/4 cup oil  
2 tsp sugar  
2 tsp fish sauce  
2 tsp soy sauce

**Method:** Pre-heat BBQ on medium heat

1. Combine the seasoning, oil and yoghurt in a shallow non metallic dish and Marinade fish for 5-30 minutes.
2. Tear cos lettuce into bite sized pieces and toss together in a large bowl with the Avocado, cucumber & grape tomatoes.
3. Brush the pre-heated BBQ plate with a little oil and cook kingfish on a medium Heat 3 minutes both sides.
4. Place the dressing ingredients into screw top jar or lidded container and shake well.
5. To Serve: Place the salad into individual serving bowls and top with the kingfish Drizzle over the dressing and garnish with a wedge of lime and crispy fried Shallots. (Kingfish is also delicious marinated in satay sauce prior to cooking on the BBQ)

### Cooking:

This succulent deep sea fish is perfect baked, barbequed, grilled or fried. It is also superb in curries, sashimi and sushi.

### Storage:

Fresh fillets will keep for 10 days if refrigerated at 0-4°C. Kingfish is highly suitable For freezing.

- ✓ **High in Omega 3 & 6**
- ✓ **High in Protein**
- ✓ **Low in Cholesterol**

# *Lemon & Garlic Infused Kingfish served with Linguine & Rocket*

Preparation time: 10 minutes    Cooking time: 25 minutes    Serves 4

## **Ingredients:**

4 x 170g kingfish fillets	1 cup parsley leaves
2 tblsp olive oil	100g rocket leaves, washed
Grated lemon rind of 2 lemons	250g linguine pasta
Juice of 2 lemons	Black pepper to taste
2 cloves garlic, crushed	Shaved parmesan cheese to garnish
	Lemon wedges to serve

## **Method:**

1. Combine the olive oil, lemon rind & juice and garlic in a non metallic shallow Dish and mix well. Add the fish fillets to the dish and allow the fish to marinate 5-10 minutes. (Not more than 30 minutes).
2. Place a large saucepan of salted water on a high heat to boil. When water boils cook pasta as per pack instructions until al dente.
3. Place the parsley and rocket leaves into the work bowl of a food processor and process until well combined. Remove & set aside.
4. Heat a non-stick pan over a medium heat and fry kingfish for 3 minutes each side, basting occasionally with marinade.
5. Drain pasta and stir the remaining marinade through the parsley and rocket pesto then toss the pesto through the linguine.
6. Place the pasta in large swirls onto each serving plate then top with the kingfish. Season with black pepper, garnish with parmesan cheese and serve with a lemon wedge.

## **Cooking:**

This succulent deep sea fish is perfect baked, barbequed, grilled or fried. It is also superb in curries, sashimi and sushi.

## **Storage:**

Fresh fillets will keep for 10 days if refrigerated at 0-4°C. Kingfish is highly suitable For freezing.

- ✓ **High in Omega 3 & 6**
- ✓ **High in Protein**
- ✓ **Low in Cholesterol**

## *Grilled Hiramasa Kingfish Skewers with Rocket Salad*

### **Ingredients: (Serves 4)**

600 gms Hiramasa Kingfish  
2 x tbs soy sauce  
2 x tbs lime juice  
2 x tbs olive oil  
Bamboo skewers

Cucumber  
Sugar snap peas  
Julienne of capsicum  
Cherry Tomatoes

### **Method:**

1. Cut the Hiramasa Kingfish into approximately 2cm cubes and thread onto bamboo skewers that have been soaked in water.
2. Thoroughly mix 2 tablespoons of soy sauce, 2 tablespoons of lime juice and 2 tablespoons of olive oil.
3. Lightly brush the mixture over the prepared skewers and place under the grill and cook for 2 minutes on each side.
4. Serve with a fresh salad of greens, cucumber, sugar snap peas, julienne of capsicum and cherry tomatoes.

**Highly nutritional – High in vitamin B – High in iodine**

**High in protein – High in omega 3 – High in omega 6**

**Low in cholesterol**

## *Crispy Hiramasa Kingfish with Greens & Lime Vinaigrette*

### **Ingredients: (Serves 4)**

12 x small skinless Hiramasa fillets	4 x tbs corn flour
8 x cups of fresh baby spinach leaves, rocket, salad greens, washed and thoroughly dried) or steamed asparagus tips	3 x tbs olive oil (or oil spray)
	2 x bunches of fresh coriander (washed and roots discarded)

### **Vinaigrette**

$\frac{3}{4}$ x cup lime juice	2 x tbs warm honey
2 x tbs Asian fish sauce	(according to taste)

### **Method:**

1. Trim fish into twelve even lengths and thickness. Dry and lightly coat each fillet With cornflour shaking off excess. Heat oil in non-stick frypan. Cook fillets for 5-7 minutes or until outside is lightly crispy.
2. Remove from heat and keep warm.
3. Combine all the ingredients for the vinaigrette in a glass screw top jar or similar and shake well to combine.
4. Arrange the pile of greens on a serving dish. Lean fish against it to form a pyramid.
5. Douse the lot liberally with the vinaigrette and top with a generous sprinkle of coriander leaves. Serve immediately.