

# aperitivONline Acqua in Bocca

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# Foreword

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In 2017, Skretting Italy started a customer engagement project aimed at exploring the needs of its customers and developing an effective value proposition based on sustainability that meets their expectations and requirements.

This process revealed a strong need to improve and coordinate the communications initiatives of different value chain stakeholders in order to fight so-called “fake news” and to improve the perceived value of Italian aquaculture products in the market.

Various initiatives and public events were developed, and these led – in late 2018 – to the launch of the communication kit “Acqua in Bocca! Practical guide to avoid spreading... fishy stories”.

The “Acqua in Bocca!” kit, which was drafted in close collaboration with Skretting Italy’s customers, is a manual designed to do justice to aquaculture products and bridge the information gap between producers and consumers.

Today, the “Acqua in Bocca!” project continues to flourish, with customer engagement at an unprecedented level. As such, Skretting Italy is working on two levels: Firstly, it is continuing to initiate pre-competitive communication activities; and secondly, it is providing farmers with tools and products that will help their positioning on sustainability issues.

In March 2020, at the beginning of the COVID-19 lockdown, Skretting Italy decided to go a step further by adopting new solutions to support its customers. This gave birth to “**aperitivONline**”, a series of webinars united by the common theme: Identifying the main trends which could shape the future of the aquaculture sector after the pandemic, and how to ride these waves.

These webinars were held once a week between March and May 2020.

Enriched by an interactive format and the presence of external experts, the **aperitivONline** webinars have provided farmers with ideas to help them prepare for the upcoming market recovery, and to take advantage of new market demands.

The following pages provide a summary of the aperitivONline keynotes.

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# Introduction

## 1.1 AperitivONline: the new format to gather ideas together

Seven webinars, 15 experts from different industries, and many questions all connected by the same theme: Understanding how Italian aquaculture will evolve post-COVID crisis and how to be best prepared for new requests from a rapidly changing market. This was the goal of AperitivONline, a webinar series organised by Skretting in April and May 2020.

In this small kit we have summarised the main contributions, discussions and food for thought that emerged from these meetings. The primary aim was to identify those key actions necessary to exploit the imminent recovery of the market.

The Acqua in Bocca project has also shown the importance of sharing ideas, and how this strategy can add value to the Italian aquaculture industry. In this regard, our goals and commitments remain the same as they were before the pandemic.

With AperitivONline, organised during the lockdown, we have sent our customers and our partners the clear message that we are here, and that together, we will get through this situation, and in doing so, become stronger than we were before.

## 1.2 What we have talked about

### 1. The fish product in the post-COVID market

- Claudio Mazzini  
*Commercial Director Coop Italia*

### 2. Not meat, not fish, just product

- Davide Calderone  
*Assica Director (Italian Meat Processing Industry Association)*

### 3. Foodservice 2.0

- Stefano Masanti  
*Michelin-starred Chef (Italy and USA)*

### 4. Online retail

- Luca Setti  
*Coop Italia Online Director*
- Sonia Massari  
*Professor and researcher on Design for the agri-food industry*

### 5. Short supply chain

- Gabriele Cena  
*University of Gastronomic Science*
- Nicola Robecchi  
*Gastronome*

### 6. Sustainability a luxury?

- Isabella Pratesi –  
*Conservation Director WWF Italia*
- Andrea Bertaglio –  
*Environmental Journalist*

### 7. Stronger together: how to build win-win relationships along the supply chain

- Matteo Torchio  
*Marketing Manager Inalpi*
- Leonardo Mirone  
*Purchasing Director Packaging & Materials Barilla Group*

## Did you know...



In March 2020, the increase in e-commerce was more than 20% higher (compared to the same month of the previous year). Online retail was the only distribution form that gained space during COVID-19 and it is continuing to grow (ISTAT data).

*Il Sole 24 Ore, 7<sup>th</sup> May 2020*



During COVID-19, French company Gloria Maris Groupe, which produces seabass, seabream and turbot, started the in-house production of prepacked fish, thus satisfying distributors' increased demand for self-service products.

*IntraFish, 4<sup>th</sup> May 2020*



You can order food on Instagram. This is a nice opportunity for KMO products and for all the small neighbourhood businesses that can deliver their products directly to homes.

*Il Sole 24 Ore, 11<sup>th</sup> 2020*



In Greece, a number of farmers, in collaboration with some restaurateurs, took part in the #Cook4Heroes campaign to offer free fish-based meals to the Athens hospital health workers.

*IntraFish, 16<sup>th</sup> April 2020*



At a European level, producer organisations (POs) and their associations benefited most from the support of the European Union as far as the storage of fish products. Quotas for certain categories have been extended up to 25% of the annual quantity.

*Council of the European Union, 22<sup>nd</sup> April 2020*



Skretting France (feed producer), Veramaris (raw material producer) and Auchan (distributor) have teamed up to bring the consumer an innovative product – trout bred on a diet containing algae oil.

*SeafoodSource, 27<sup>th</sup> February 2020*

# Fish products after the pandemic. The keywords of restarting

## 1. TRANSFORMATION AND INNOVATION

### 1.1 The processed food grows and ask for innovation (even) from farmers

In most agri-food industries, processed, frozen and canned products have better responded to the COVID-19 crisis. This increasingly pronounced consumption trend reflected consumer needs during the lockdown period: demand is higher for products with a longer shelf-life and which are easy to cook.

During the pandemic, there has been a sharp drop in fresh fish sales. It has perhaps been the most affected food commodity category. In Mediterranean countries, the production reduction was estimated to have reached 75% for wild-caught fish and between 50% and 60% for farmed fish.

The fish supply chain is strategic for Italy and will continue to grow, but it will take time and effort to

establish new consumption opportunities. In the meantime, fish producers should move towards solutions that meet the consumers' need for safety without precluding quality and freshness perception. For example, it is possible to offer pre-cut and packaged fish or alternative portions in order to satisfy the different consumption needs.

Processing companies can play a key role in helping farmers to recover from the sharp drop in sales by driving innovation in the industry. They can also facilitate the introduction of new products into large retailers. This underlines the importance of investing in win-win relationships along the supply chain.

### 1.2 Long life to packaging

The crisis has made consumers much more mindful about hygiene and food safety issues. In the meat industry, for example, the cutting table sales dropped dramatically, while prepacked products recorded strong increases. This trend was especially evident in large retailers. Although the GDO has taken all the necessary precautions, in local stores, the friendly relationship between consumer and shopkeeper establishes greater

confidence in counter product safety.

The trend is similar in the fish industry. Therefore, it may be prudent to drastically rethink visual presentations, moving towards sales solutions that offer people the freshness and extended shelf-life that they want, while also guaranteeing maximum safety by limiting the direct contact with products typified by traditional fish counters.

## 2. FOODSERVICE 2.0

### 2.1 An industry to be reinvented, in the name of safety (and education)

Foodservice has been particularly affected by the crisis and will also be one of the industries with the longest recovery time. The impact will be greater for small-sized restaurants, but major chains will also experience significant changes.

Moving forward, foodservice 2.0 will be very different from what we have been accustomed to. Restaurant visits will be subject to restrictions for a long time, with new hygiene procedures put in place. This could lead to the further development of the food delivery sector, which has recorded a significant increase in demand during the pandemic, and also the further growth of the so-called "dark

kitchens", which are operations solely dedicated to the production of food that will be delivered directly to homes.

The kind of products purchased by restaurants will also change, with increased movement towards easy-to-preserve products and larger fish, which allow chefs to maximise the value of each product. At present, restaurants serving fish have very high waste levels because the average fillet yield is only 40-45%. However, costs can be reduced by sourcing larger species and developing innovative recipes that utilise by-products that are usually discarded such as the heart, stomach and liver.

### 2.2 Farmed fish, but local and sustainable

In recent years, consumer awareness of food sustainability issues and nutritional values have grown significantly, with more and more people wanting to eat in a healthy, light and conscious way. Fish is an ideal food to meet these needs and will continue to be an essential part of the human diet.

Within foodservice 2.0, local aquaculture could meet the demand for fully-traceable, healthy and

sustainable fish. To this end, it is important to adopt a transparent and proactive approach to the most relevant sustainability issues, including reducing products' carbon footprints (carbon dioxide emissions), responsible and cost-effective fish feed use, and also ensuring that measures are in place that protect animal welfare and that there is minimal environmental impact on areas surrounding the farm.

### 2.3 The supply channels

The disruption caused by the crisis is likely to lead to the reorganisation of many supply chains. It is also expected that there will be some consolidation among the industry's major operators, and that medium- and small-sized operators will reorganise to enhance their offering across territories. This will provide a good opportunity for local producers to gain new market share.

In this perspective, it is important to provide for joint communication with restaurateurs, in order to exploit the full provenance value and its history.

Another key element for conveying positive messages is the front-of-house staff, who are the main sellers of fish dishes to consumers, and therefore must be trained to best perform this crucial role.

## 3. E-COMMERCE

### 3.1 Selling fish online is possible. But with a good story

In recent months, online sales have grown exponentially. This offers many new opportunities for agri-foods. However, fresh fish has struggled to take off in this area. It is considered a "difficult" product because consumers tend to want direct contact with products and also have the support of sales staff.

Therefore, to gain ground on e-commerce's virtual shelves, fish sellers should look to images, videos,

written descriptions and certifications that satisfy consumer curiosity and the need for transparency. One way to achieve increased sales is through digital storytelling, whereby digital channels and customer interactions are used to tell true, meaningful stories and create a connection with a particular product. Such a strategy can allow small producers to leverage the consumer emotions, pass on the values characterising their business and increase sales opportunities.

### 3.2 Online and short chain. When innovation starts with the "small ones"

Border restrictions have significantly impacted international trade and the subsequent decrease in pressure from imported fish has created a competitive advantage for Italian products.

Looking ahead, with difficulties in shipment and exports remaining, domestic markets will become even more important, and the demand for local products – previously a niche market – could soon become a global trend.

To increase business opportunities, new digital channels can be used to allow producers to connect with consumers and thus increase the number of potential customers. However, to fully capitalise on these opportunities, cultural and digital transformations are required. Small producers could have an advantage on the road to innovation, considering their closeness to the market. In addition, they could educate consumers – helping them discover of new ways of purchasing and consuming products.

### 3.3 Service content and flawless presentation

When we talk about online sales, we must consider that we are no longer buying a simple product, but a real service that includes several crucial steps, from the product preparation through to actual delivery. For this reason, it is important to provide consumers with all information needed to make a conscious choice – from mandatory information on nutritional values and traceability to issues more related to that specific product and its history. Practical tips for product preparation can also be given.

Furthermore, with online sales of fresh products such as fish, food photography will have an increasingly important role. Not being able to buy the product in person, consumers have to base

their purchasing decisions on images, which must reflect the actual product as much as possible. The food photographer's purpose is to reproduce the smell and taste sensation of the real product through imagery.. To ensure an informed decision is made, consumer must also be educated to correctly interpret the information received.

Another important role is played by packaging, which becomes a "business card" when the product reaches the consumer. The packaging must keep the product fresh, make it appealing and extend its shelf-life. In this way, sales opportunities will increase.



## 4. SHORT SUPPLY CHAIN AND WIN-WIN RELATIONSHIPS ALONG IT

### 4.1 The new markets? Italians and local

Because of border restrictions and difficulties in overseas shipments, domestic markets will become even more important for producers. The demand for local products, previously only a niche market, could soon become a global trend.

To get closer to the consumer and enhance their products, manufacturers need innovative sales processes. In this regard, the entry of new generations into supply chains can facilitate the change bringing new energy, skills and points of view.

### 4.2 Communication and innovation run through the supply chain

Telling a product's story well means enhancing its uniqueness, transmitting the quality features to the consumer, as well as the commitment and values of all the players, especially the suppliers. An essential role is played by the stakeholders (chefs, schools etc.) which allow the message to reach the target audience in a clear and engaging way.

For truly effective and creative communications, all the actors in the chain must be involved in achieving the best possible results. This can only happen by adopting a win-win approach, with all stakeholders collaborating towards a common and mutually beneficial goal.

### 4.3 Tell a simple (and true) story

Every product should have a good story to tell. To enhance a product, the tendency is to communicate too much – give too much information, include too many labels etc. The result is confusing rather than convincing.

The starting point for boosting a local product is a true and genuine story. It brings to light the values in which the consumer can identify. A story that emphasises the farmer and the human commitment behind the food on the plate is an engaging one. However, it is essential to avoid rhetoric. Storytelling

can (and must) be innovative in form and channels, but must always be based on truthful content.

Telling the story of a product also means communicating the territory in which it was produced, and can therefore combine different products that can be consumed contextually. From physical and online tastings, to the combinations offered by restaurants and village shops, there are many strategies already implemented by producers of meat, cheeses and wine. These solutions, in the future, may be adapted to local aquaculture products.

## 5. SUSTAINABILITY

### 5.1 Sustainability not a luxury

The lockdown has brought positive effects on the environment, including reducing noise, harmful emissions and waste. The link between ecosystems and human health is increasingly evident, and it is exactly for this reason that after the crisis, business opportunities will be generated by the elevated

sensitivity among consumers. It is important to capitalise on this. Operations that haven't yet engaged on such issues must be prepared to take action, while those who have already invested in this area must continue to do so if they want to take full advantage of the situation.

### 5.2 Everyone can do something

Sustainability has not always been a burning issue, but in the last three years, it has become of much wider interest and engagement. The coronavirus crisis has further raised attention levels. However, the sheer magnitude of certain sustainability issues means many people think that their actions will have little positive effect on a global scale.

Instead, it is important to understand that everyone can do something to improve their industry's sustainability, and it is even more important to communicate the value of their commitments to end consumers. Only in this way will it be possible to

build a better scenario and move closer to a circular and sustainable economy.

Economic and social systems are very closely linked to the environment. Therefore, it is necessary to re-evaluate ecosystem protection from a "business sustainability" perspective, whereby investments are made that safeguard economic systems and also society, enabling them to adapt to changes.

The overriding goal of sustainability is not to save the environment, but to save humanity.

### 3.3 Aquaculture and sustainability

Nowadays, consumers are becoming increasingly informed and sensitive about the environmental impacts of food production systems, particularly with regards to livestock products and supply chains. Aquaculture therefore has the ambitious challenge of growing its production while reducing its impact on the environment.

As such, it should look to introduce more circular economy solutions, which give purpose and value to by-products and waste that cannot be used as food for human consumption.

Another important issue is the reduction of greenhouse gas emissions, particularly

those generated by feed production and farm management. Using low impact feeds and decision support systems that optimise yield and reduce waste reduction can significantly reduce the impact of end products.

Ultimately, it is always important to take consumers into consideration, and identify the values that could push them further towards more sustainable Italian products. In this regard, good communications with supply chain stakeholders and also conducting marketing analysis can provide excellent food for thought.

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