

Cogépêche technical guidebooks

# Reconceptualising seafood sales outlets



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The « **Reconceptualising seafood sales outlets** » booklet identifies possible avenues, ideas and solutions for marketing sea products. The way sea products - either fresh or not - are currently marketed does not fully exploit the commercial potential of Breton seafood production. The theoretical bases organising product display at traditional fishmonger's stalls or supermarket fish counters do no longer meet consumers' expectations and behaviours. This booklet aims to propose an alternative, updated theoretical and practical framework so as to better display sea products in general, and fresh sea products in particular.



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# Current organisation



## PRODUCT FAMILIES

Several product families, or **categories**, make up the seafood offering. Differences in terms of degree of processing and conditioning characterise the different categories of products. The conservation method at store level is another **segmentation** factor. Usually, four main sea product categories are identified:

### Canned products

Conditioned in metal cans, glass jars or plastic pots, these products are characterised by extended shelf lives at ambient temperature. This category traditionally includes seasoned fish fillets, chunks and slices. Fish soups and aperitif products like rillettes, tapas and other spreadables also fit in this category.

### Deep-frozen food

Kept in frozen storage and then in a freezer, these products can also be kept for a long time at negative temperatures. Fillets, steaks and chunks – raw or with a sauce – make up for most of the offering, together with breaded products. Frozen seafood also commonly includes cephalopods and shelled prawns and shellfish. Ready meals account for a sizeable proportion of the section.

### Chilled delicatessens

Stored at refrigeration temperatures, delicatessens have a variable shelf life. This product family is the most disparate and includes ready meals, cooking aids and all sorts of spreadables. The segment is organised around two main products: surimi and smoked salmon. It is by far the most “marketed”, proactive and saturated segment. The offering is often over-abundant but the so-called “**core meal**” products have not reached saturation point.

### Fresh products

This traditional seafood segment includes wild and farm-bred fish, shellfish, crustaceans and cephalopods that have undergone limited processing. These products have a shorter shelf life (a few days) and must be kept at refrigeration temperatures. Depending on the retail outlet, this product line may range from a dozen up to 150 different products. Purchases, however, tend to concentrate on a few species: salmon, prawn, cod and mussels. It is to be noted that products may be packaged in front of the customer (by the fishmonger, at the stall) or sold already packed, usually on a polystyrene tray in the self-service section.

**SEGMENTATION:** In marketing, segmentation involves “dividing the marketplace into segments presenting different features and then applying totally or specific operational marketing strategies to each of these segments (Helfer and Orsoni, 2000). For example, a population of consumers may be segmented according to age, social and/or professional category, income, lifestyle etc. This technique is often used for identifying a product’s main and secondary targets.

Here, segmentation is applied to the products offered for sale based on product conditioning. This leads to a classification of sea products in various “categories” or product families, a notion widely used by large retailers to organise product display.

**CONSUMPTION MOMENT:** This marketing concept defines the moment when a product is being consumed. Each consumption moment involves different constraints in terms of time, budget, conviviality, convenience, etc. This notion of consumption moment is all the more essential in the case of seafood as the distinction between weekdays and weekend has a significant influence on the type of products consumed. “Breakfast”, “weekday evening”, “lunch at work” and “festive weekend meal” are examples of consumption moments which are associated with very different types of meals: meal duration, type of cooking, etc. will differ greatly.



## IN-STORE SPATIAL DISTRIBUTION: A HIGHLY SEGMENTED PRODUCT OFFERING

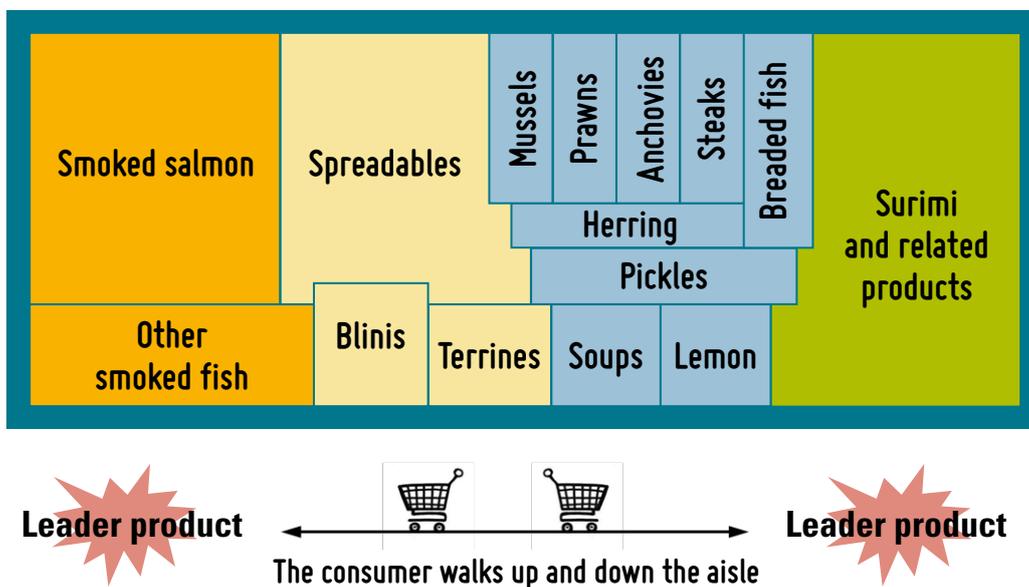
In-store spatial distribution of the products is based on product segmentation. Contrary to traditional fishmongers, which have a specialised, concentrated product mix, super and hypermarkets offer a multitude of consumption segments, which makes influencing consumers' purchases even more difficult. Sea products are scattered over several departments: canned seafood with other canned products in the dry grocery aisle, frozen seafood in frozen storage with other frozen goods, delicatessens near the fresh food aisle and raw products at the traditional/self-service fish counter.

In the same way as the various product categories are distributed over floor space, each category is then segmented according to the nature of the product. Depending on the department manager, segmentation may be based on the brand, price positioning or recipe, with significant impacts on shelf space organisation. Shelf space is organised around two or more leader products that are placed at both ends, thus creating « **hot spots** » that generate traffic from

one end of the shelf to the other, as illustrated in the diagram below.

Despite this spatial distribution, few sales outlets totally split their offering. The delicatessen section, fresh fish counter and the pre-packed fresh fish section are increasingly placed near each other. But this physical proximity is not backed up by a strong idea or concept and products are all arranged in the same way. Thus even though related product segments are physically closer together, this is not enough to create any real synergy.

**HOT AND COLD SPOTS:** *In merchandising, retail space is divided into more or less attractive areas making the products more or less prominent. This principle operates at the scale of the store (traffic flows) and the shelf (consumers' eye level, hand level, walking pace and trolley speed).*

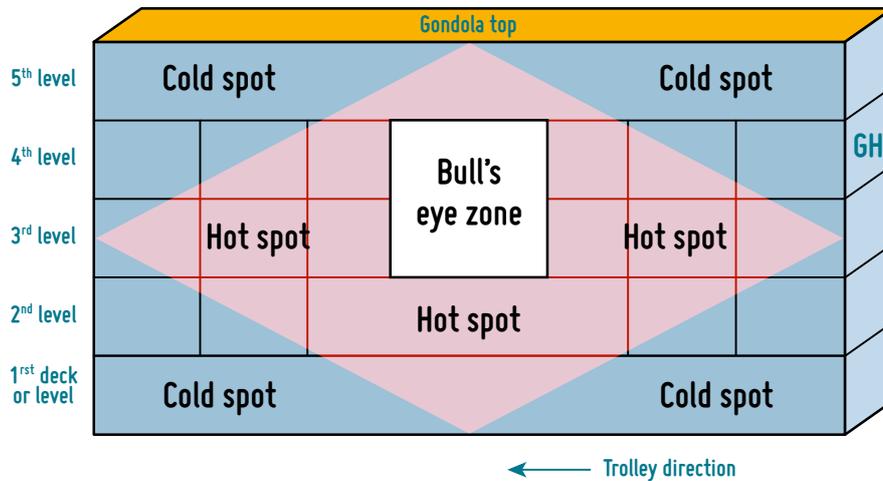


Example of shelf space layout for seafood delicatessens (Source: Tétard and al., 2011)

Malgré cette clef de répartition de l'offre, rares sont les points de vente qui ont une offre complètement éparse. On constate de plus en plus un rapprochement du rayon traiteur et de l'étal frais ou du rayon marée (frais emballé). Cependant, ce rapprochement relatif de certains segments de l'offre n'est pas étayé par un concept,

une idée forte. Les produits restent organisés de la même façon. Ainsi, même si les segments de l'offre sont géographiquement plus proches les uns des autres, aucune synergie n'est réellement créée entre ces différents rayons.

## Shelf space layout



Hot and cold spots at the scale of the shelf (Source: comm.pers. S. Gouin)

## CONSEQUENCES ON CONSUMERS' PURCHASING BEHAVIOURS

This arrangement per type and nature of product is not the best for either seafood or consumers. In supermarkets, customers seeking out different products have to walk up and down the aisles and the distance travelled may be quite significant depending on the store's surface area and layout. Such a distinction between sea products leads to a dispersed presentation and makes it difficult to build a coherent offering. The risk is that consumers will get discouraged if they cannot rapidly find the product they want.

At the scale of the shelf, the main problem is when the offering is extremely varied. Arranging products according to their nature may be complex to organise for the retailer and difficult to understand for the consumer, who will prefer to stick to the basic products he knows

and trusts. Such organisation does not help promote new, seasonal products (a more relative notion for processed food). Consumers tend to focus on the most attractive products which become the most commonly purchased product items.

Consumers are then confronted with this organisational issue both at store, and then at shelf level. The wide diversity of sea products is once again both a strength and a weakness. It is a strength because the wide "range" of products spoils consumers for choice; but it is also a weakness if poorly presented, as consumers may waste time searching for the product they want in the store and then on the shelves. Unhappy and frustrated, they may even change their initial intention and buy other products instead (dissonance effect).



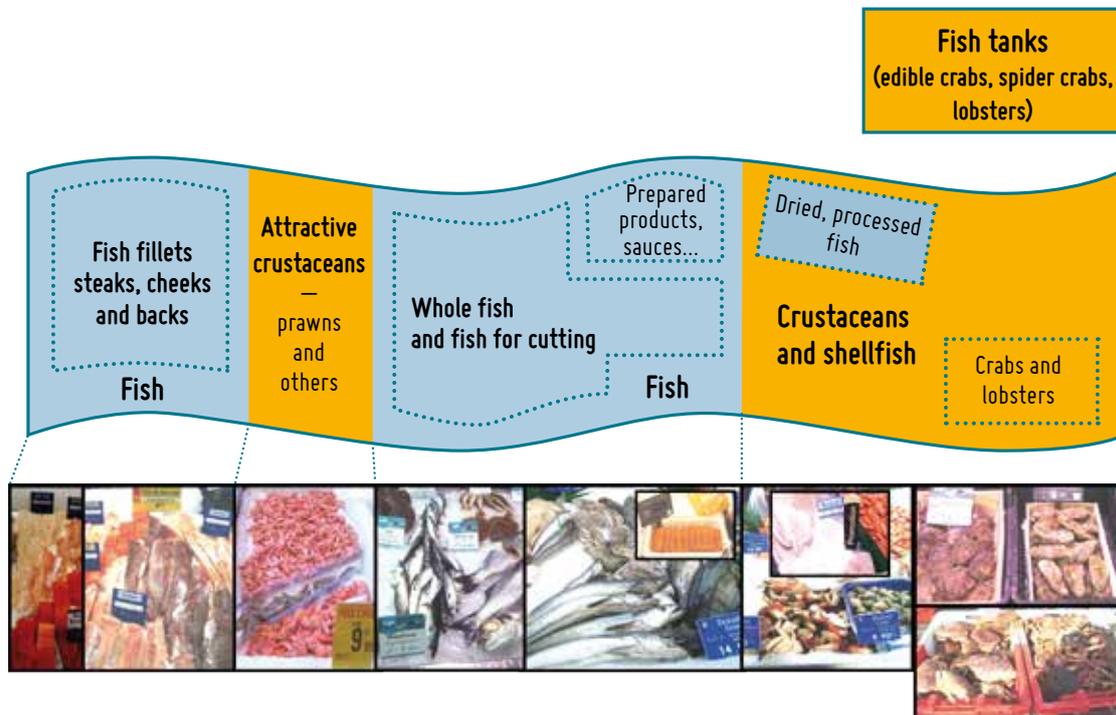


## FOCUS ON THE FRESH SEAFOOD STALL

The fresh seafood offering is broadly structured in the same way as other sea product families. Biological group, species, cutting method (fillet, steak, etc.), shape, size, degree of preparation and colour are the main criteria that structure product display. Varying degrees of complexity may be observed but product display principles remain broadly the same. The diagram below illustrates quite an elaborate stall display with a clear effort at staging the product.

Whatever the size of the fresh fish stall, the following “tips” can help stimulate sales. Processed fish is often placed at one end of

the counter, with shellfish and crustaceans at the other end. Coloured products like salmon and prawns are also used to break the monotony of white fillets. As a general rule, dried or salted fish are used to separate fish from shellfish/crustaceans. This efficient and somewhat pleasing display does not, however, help the consumer with choosing and purchasing fresh products. Faced with too much choice, customers will rapidly turn to special offers, hesitate over the species they do not know and fall back on a “classic” species if the assistant is not there to advise or guide them in their choice (mute sale principle).



Example of a relatively complex and thought-out fresh seafood display (Source: Tétard et al., 2011)

## FROM CURRENT ORGANISATION TO RECONCEPTUALISATION

The way products are displayed on the shelf space and presented to customers is therefore a barrier to enhancing sea product value. The sector does not fully exploit the wealth of species and products it makes available to consumers and poor product display only generates confusion in their minds. Consumers are also

constantly modifying their consumption and buying habits but sea product marketing has not moved with them. If fishmongers want to continue to sell fresh sea products, they will have to change their product offering and even more so their retailing methods.

# Rethinking sea product retailing



The thinking behind overhauling sea product retailing originated from a simple fact: innovation and processing cannot be the only ways to add seafood value. Brittany has developed a tradition and know-know around sea products that must be preserved. But clearly the gap between what these products can provide and consumers' expectations keeps increasing. How to entice customers back to fishmongers' stalls? The solution may lie not in changing the products themselves (although innovations are not to be excluded) but in revamping the fish stalls.

## THE BENEFITS OF RECONCEPTUALISATION

The aim of reconceptualisation is to rethink store organisation and product display, considering both retailers' and consumers' constraints. Consumer requirements lead to expectations and needs in terms of product quality, price, information and features (see the "Consumption of fresh sea products" booklet). These **expectations and needs** are not always consciously or explicitly expressed by consumers but they influence a large part of their purchasing behaviours.

Consumers' expectations change with the way they perceive the products. Convenience, for example, is one of the principal expectations of consumers. Less time for cooking means stronger expectations

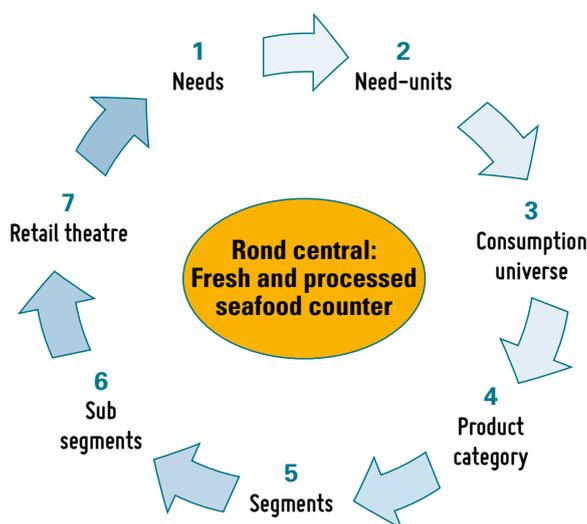
in terms of product convenience. This change in behaviour entails a change in product status, with food being no longer perceived as just an "ingredient" but as a "solution". Food products are therefore increasingly perceived as services in the sense that they are expected to address a specific issue.

The concepts of services and consumption moments are gaining momentum as food products are becoming more and more functional and are losing their "commodity" status. Since these changes in consumption patterns have a direct impact on purchasing behaviours, product display must adapt to this new way of considering food.

## THEORETICAL BASES OF RECONCEPTUALISATION

The layout and segmentation models presented in this booklet as a response to these new purchasing habits are based on the concepts of need, need-unit and consumption universe. This rationale applies

to the products themselves and to product display as even the best product will not sell as it should if poorly displayed to consumers.



Sea product marketing sequencing (according to Cogitore, 2003)



# Rethinking sea product retailing

Identifying **consumers' needs** is essential, as the whole approach aims to address those unsatisfied needs, or “**insights**”. Knowing what the consumer wants is therefore a prerequisite. Each need is then divided or gathered into need-units, the most detailed level for describing consumer behaviour. Each need-unit corresponds to one or several products that play a similar (the products are then competitors or can be substituted) or complementary role. Examples of sea product need-units include: “white fish fillet” or “whole fish to be baked”.

Need-units are then aggregated to form a **consumption universe** regrouping similar, homogenous and complementary need-units: sea product universe, meat product universe or textile, fashion or baby universes for non-food products. A consumption universe may correspond to a number of consumption moments aggregating all the need-units identified in these situations. For fish products, the “aperitif” consumption moment may be composed of the “spreads”, “spreadable support”, “wine to be drunk with seafood” need-units. All the products necessary to satisfy consumers' needs in a given situation are therefore located at the same place.

Within each consumption universe, products are divided into **categories**. These categories are composed of products (or **services**) sharing common features (Lehu, 2012). They in turn form segments and **sub-segments** that may be promoted by using **retail theatre** to stage the products. This helps structure the offer at store level and on the shelves. Consumers may not be aware of it, but all products are displayed to suit their needs (and not so much the retailers' logistical concerns). The ultimate aim is to reconcile this customer-oriented organisation with retailers' technical constraints.

**RETAIL THEATRE:** Retail theatre is a point of sale marketing technique aimed at attracting consumers and making the time spent shopping more pleasant through the use of event-related or situational sceneries. The objective is to create an ad-hoc or permanent atmosphere that facilitates purchases. Retail theatre appeals to all consumers' senses through images, sound (soundscape...), videos (screen), lighting, tasting, etc.

For further information, see the booklet dedicated to retail theatre applied to seafood sales outlets.

This way of structuring and modelling the offering may at first seem complex but is easier to understand once the concept of need-unit is assimilated. Without depriving them of their traditional, historical features, products have to be viewed as services. The aim is not, however, to make the seafood offering cold and logical; on the contrary, it means maintaining and harnessing the folklore that stimulates consumers' emotions and contributes to increasing their loyalty.

Need-unit applications are many and can be used to circumvent one of the major obstacles to fresh sea product consumption: seasonality. Considering demand as a combination of need-units makes it easier to substitute products. Similar species serving the same functions are available at different times of the year, making the seasonality and variation in fish production more acceptable to consumers. This is of course provided that the sales staff and retail theatre are there to play their role in raising customers' awareness and changing their consumption routine.

## TOWARDS A RECONCEPTUALISATION THAT MEETS CONSUMERS' LIFESTYLES

Reconceptualisation per se is not enough. Too abstract for consumers, this concept must be handled by professionals. In practical terms, this involves modifying the store layout so as to better control consumers' movements, product display, product combinations, etc.

The new product offering will better reflect changing consumers' lifestyles. Retail theatre is then introduced to convey explicit or implicit messages to the consumer.

# New sea product merchandising concepts



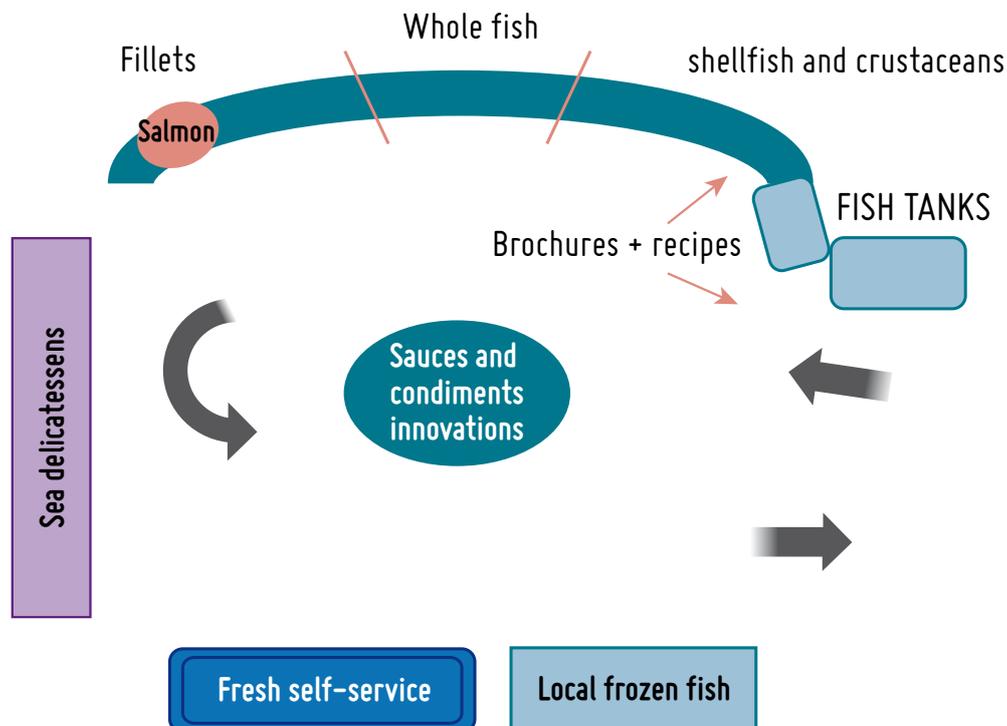
Three layout drawings based on the above concepts are presented in this booklet. As fully revamping a sales outlet is a heavy investment, three degrees of reconceptualisation are proposed. They must be viewed as examples of how to implement the aforementioned concepts. Each reader will then determine, based on the solutions explained here, which layout is the most appropriate considering available surface area, target consumer base, regional context, consumption patterns and supply.

These drawings cover shelf space layout only. Retail theatre provides a set of tools for staging product offerings that are complementary to the layout and arrangement of the retail furniture. It is the last step in the reconceptualisation process, the one that gives concrete, physical expression to the new thinking on product display. It is through retail theatre that consumers are made aware of the changes resulting from the reconceptualisation of their outlet (see retail theatre booklet).

## SIMPLE RECONCEPTUALISATION: GROUPING BY PRODUCT FAMILY

The first layout consists of simply gathering the various sea product categories in the same space. The resulting universe is organised

around hot spots and a controlled flow direction drives consumers to the various display units.



Layout based on a simple grouping by product family (Source: Fasquel et al., 2014)



The above drawing represents a semi-closed space, laid out to facilitate the identification of the sea product universe. Low furniture is used to avoid a feeling of confinement. Consumers' vision is not limited and they easily recognise the area without feeling closed in. This layout is also suitable for traditional retail fishmonger's shops which are by definition closed areas.

Fish tanks mark the entrance to the sales area. These highly efficient retail theatre props drive traffic to the sea product universe. Recipes and brochures may be made available to customers at this location. These promotional documents can be used to guide customers' purchases - by presenting seasonal products in a recipe, for example - and to draw their attention to specific products. This type of action contributes to promoting the product without negatively impacting its price. Advice is another way of building consumers' loyalty.

The hot spots - the sea delicatessen counter and salmon on the stall - are located at the opposite end of the area. This layout generates traffic within the area whilst keeping traffic flows under control. Customers are drawn to these classic products but have to walk the length of the stall to reach them, an opportunity for fishmongers to draw their attention to other products.

At the centre of this sea product area is an island dedicated to innovations and **cross-merchandising**. Cross-merchandising is the practice of displaying products from different categories together. The island is logically located at the centre of the area as this additional offering is usually a source of **impulse purchases** with significantly higher margins. Its central position ensures easy access, encouraging consumers to give in to temptation. Innovations must also be highlighted. The central position draws attention, which is desirable when launching a new product. When appropriate, this prime spot may also be used to promote seasonal products.

The fresh self-service and local frozen fish counters are alternatives to the fresh fish stall. The self-service counter will be preferred at peak times or by customers in a hurry. Its ready-to-cook products may also complement the more discreet "core meal" offering on the delicatessen counter. A frozen storage unit may be dedicated to local deep-frozen goods (on the spot or otherwise) so as to maintain a wide range of products all year round. Selling local "out-of-season" products helps smooth seasonality, with the fresh fish and the frozen fish counters complementing each other depending on the

**CROSS-MERCHANDISING:** *Cross-merchandising is a selling technique which consists of presenting products outside their usual sales area, next to complementary items. Products are associated on the basis of the "situation-function" principle: consumers buying a given product are offered a second one they might need in combination with the first. Examples include: Chantilly cream and strawberries, lemon and smoked salmon, oyster knives and oysters.*

**IMPULSE PURCHASE:** *Purchases may be rewarding, considered, basic, etc. An impulse purchase is an unplanned purchase: the consumer spontaneously decides to buy a product when seeing it at the store.*

season. The fishmonger must take an active part in this approach, from product selection to advice to consumer, and may suggest frozen fish if not available at the fresh fish counter.

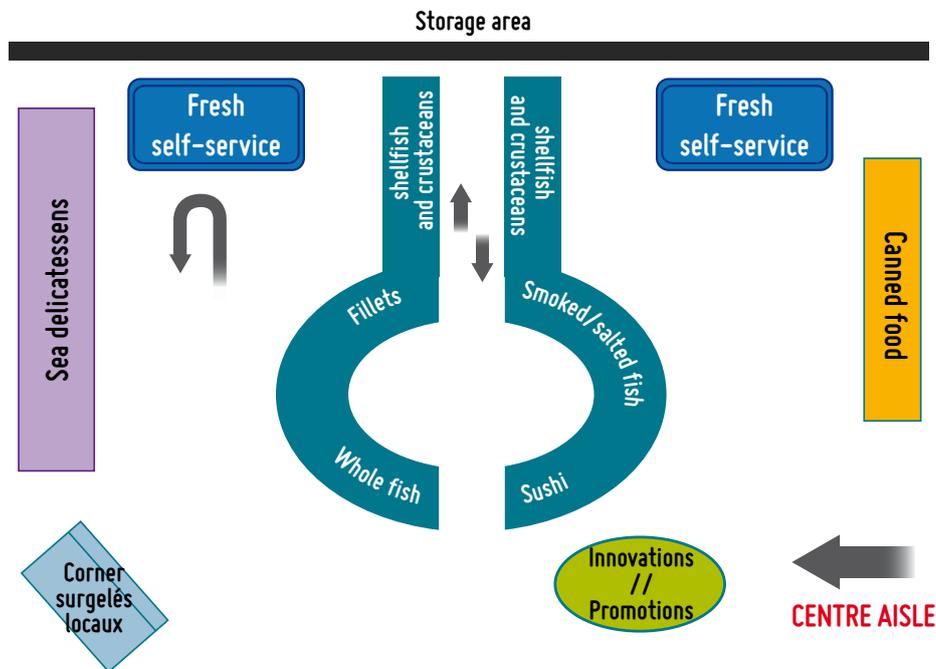
The rest of frozen and canned sea products will remain in their respective departments. Canned product purchasing is not made for the same reasons as the other products. It follows somewhat more of a contingency "store cupboard" stocking logic rather than a well thought-out sea product buying process. Frozen products are more difficult to relocate into the sea product sales area for technical reasons and they are usually the last category to be included in the reconceptualisation process. Moreover, a large proportion are imported and/or farm-bred and are sold at lower prices than local products. Bringing them together may therefore put local products at a high risk of **cannibalism**.

**CANNIBALISM:** *Consumers shift their purchases to a new product. In marketing, two products "cannibalise" one another when the sales of a product eat into the sales of a same-brand or competitive product (Lehu, 2012).*

## MIRROR EFFECT RECONCEPTUALISATION BASED ON STALL/ SHELVING SYMMETRY

The second layout highlights the traditional fresh fish stall by placing it at the centre, thus laying the emphasis on fresh sea products. This layout also provides an opportunity to display products that are not usually presented. It is especially suitable for independent retailers

whose product range is mainly composed of fresh products. In supermarkets, this layout associated with low furniture units help re-create a “marketplace” atmosphere similar to that sometimes used at the fruit and vegetable department.



Layout based on fish stall / shelving symmetry (Source: Fasquel et al., 2014)

The fish stall central position is made possible thanks to the access corridor to storage areas. This layout contributes to maintaining the area occupied by customers clean and dry when restocking the fish stall. Melted ice on the floor and humidity around the stall are indeed undesirable as they tend to repel customers.

This layout is based on the mirror-effect principle between the stall and surrounding display units, the latter complementing the stall offering. To limit competition between them, the fishmonger must be fully engaged in his role as salesperson and adviser. According to the mirror-effect principle:

- ✦ fillets are placed opposite delicatessens and self-service fillets,
- ✦ whole fresh and frozen (here local) products complement one another depending on the season,
- ✦ sushi and “innovation / promotion” island displays are placed at the entrance to attract customers,

- ✦ smoked and salted products on the stall are placed opposite similar self-service products,
- ✦ canned products are integrated when they fulfil a “contingency” product role.

Hot spots are used in a similar way. Delicatessens and stall fillets are placed opposite the entrance to generate traffic flows across the whole area. Canned and smoked products do not benefit much from the attractiveness of delicatessens, but as they do not meet the same buying motives, this layout does not generate “cold spots”.

The fish stall centre position is the focus of this layout. The prominent place given to fresh products makes fishmongers’ professionalism and advice essential to its success. By bringing together products from various segments, the mirror-effect concept makes the fishmonger the central figure of the sea product area.

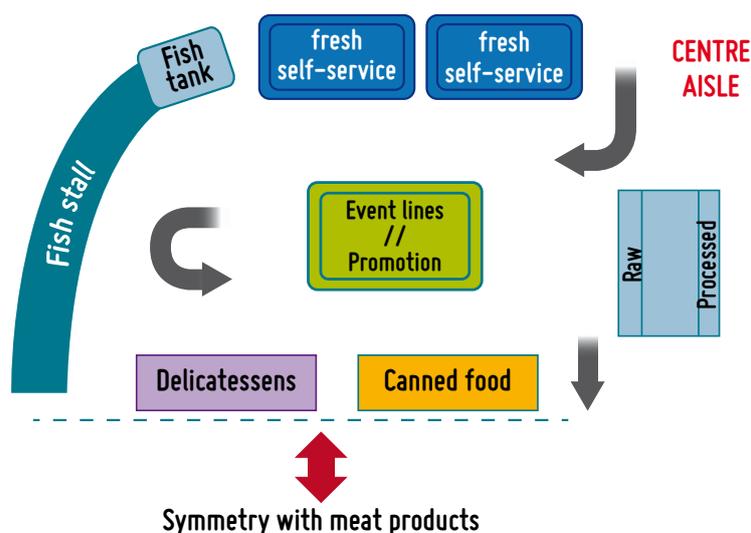




## RUPTURE RECONCEPTUALISATION: CREATING A “SOURCE OF PROTEIN” UNIVERSE

The third layout is the most ambitious. It is the layout that best translates the desire to change purchasing habits that underlies the Co-gépêche programme. This layout is also based on the mirror-effect concept, but applies to a wider range of products including both sea and meat products. The objective is to create a “source of protein”

universe. Difficult to put into place, it is the ideal layout for stores of the “Grand Frais” type (a food chain specialising in fresh products) or possibly for covered markets (by bringing together a fishmonger’s stall and a butcher’s stall).



Layout for a “source of protein” universe (Source: Fasquel et al., 2014)

Because they no longer know how to alternate sea product species, origins and cuts, customers do not know “what to buy”, a problem that is not so acute with meat products. Bringing together these two universes presents a number of advantages in addition to benefiting from the attractiveness of meat to draw customers to seafood. This layout places meat and fish on an equal footing in consumers’ minds. The objective is to encourage them to adopt the same behaviour towards sea and meat products. Both are sources of protein and their roles in dietary habits are similar.

This layout integrates all sea product segments, including frozen and canned food. Contingency, “must stock” items have their place here

as all products are viewed as sources of protein, regardless of their conditioning.

This layout represents a radical change in buying, consumption and marketing habits. It involves all stakeholders, from consumers to retailers. The role of the sales staff is once again pivotal, as this layout would be extremely difficult to implement with no customer support. Despite this difficulty, this layout is totally relevant in a context where French people are paying increasing attention to the nutritional value of food.

## RECOMMENDATIONS

**Caution!** These layouts are the result of a thinking process carried out with various sector practitioners. Wholesalers, fishmongers, heads of departments and processors have participated in devising these layouts. These redesigned, improved layouts are just examples of how the concepts and notions presented in this booklet may be implemented.

Readers are invited to take ownership of the notions and changes that the reconceptualisation of the sea product universe implies. These layouts are complete but not rigid. They can be simplified, combined or modified to suit the store’s customer base, supply, geographic location and objective.

# Towards a more homogeneous offering



In the long term and if correctly implemented, the reconceptualisation process as presented in this booklet should result in:

- ✘ **A change from a dispersed to a conceptualised universe**, with a more coherent product offering organised around consumers' expectations and not around retailers' constraints.
- ✘ **Diversified sales based on the need-unit concept**. The need-unit approach makes it easier to substitute products by changing customers' vision of a product. Without denying the specificities that make up the richness of Breton sea products, this more pragmatic approach helps consumers better accept the seasonality and variability in fish supply and encourages them to discover new products.
- ✘ **Modifying buying habits** by introducing a new product display, more in line with consumers' expectations and based on the situation-function and need-unit concepts. Helping consumers better understand the products should contribute to changing consumers' attitude from an opportunistic, price-oriented behaviour to a more logical approach that puts consumers' needs first without neglecting price and pleasure.
- ✘ **Diversifying promotional tools**, by changing purchasing behaviours and consumption patterns. Today's consumers are more volatile, less loyal and more sensitive to price because they have

**PERCEIVED QUALITY AND ACTUAL QUALITY:** Actual quality is based on the intrinsic features of the product, it is an objective, unbiased evaluation. Perceived quality is based on what consumers see, think and believe. There is therefore almost always a gap between a product's perceived and actual quality. A number of factors influence consumers' opinions, leading them to over or under-estimate the product.

**WILLINGNESS TO PAY:** Willingness to pay (WTP) is the maximum amount a consumer/buyer is willing to pay for a good or service (Lehu, 2012). This limit set by the consumer depends on his appreciation of the product, its qualities and services.

lost their bearings. Price thus becomes the easy way to choose between products. Improving their knowledge, even just slightly, would help consumers perceive the actual qualities of the different products. Bridging the gap between **actual and perceived quality** should also help increase French consumers' **willingness to pay**, thus making special offers just one of the promotional tools available.

Current offering	Reconceptualised offering
◦ dispersed universe	◦ conceptualised universe
◦ classic product offering focusing on 3 species	◦ diversified, more visible and attractive offering
◦ promotion-oriented purchase	◦ situation/function purchase
◦ opportunistic purchasing behaviour	◦ structured, thought-out, indulgence purchases

From current to reconceptualised offering (Source: Fasquel et al., 2014)

# Conclusion



The reconceptualisation of sea products as a consumption universe is still at a theoretical stage. Although category management and offer segmentation in need-units have successfully been implemented in other consumption areas, the sea product universe is not so easy to organise into a single area as this involves several segments (fresh, frozen, canned and delicatessens) as well as working with several managers from the fresh produce, dry grocery and frozen departments. The difficulty also lies in bringing together products from different categories, not such an easy task, and in raising consumers' awareness by modifying their rationale for buying and using sea products. Sea products still hold potential for added value as their intrinsic and extrinsic qualities - origin, diversity, methods of preparation and use, variety in tastes and textures, extended price range - are not fully exploited.

But overhauling store organisation and product display is not enough to have an impact on consumers. Reconceptualising retail outlets and the sea product universe must be backed up by all the communication tools available: media and non-media, online and offline.

The sea product sector is facing a major challenge that concerns all its stakeholders, from fishermen to consumers. The long-term objective is to change product display, marketing, buying and consuming habits. It is a long-term endeavour but the diversity and naturalness of sea products are worth this reconceptualisation effort.



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