



*I saw this and thought of you!*

xxx!



# *THE 2016 DRUMMOND LECTURE*

## SHELLFISH - FUTURE PROOFED!

**Mike Berthet**

**Market Development Manager  
Foodservice UK**

**Global Aquaculture alliance**

**the** global aquaculture  
**alliance**



# What are the future opportunities for SHELLFISH in the Foodservice market?



# How it was....



- The mighty and ubiquitous PRAWN COCKTAIL!



# Moules Marinieres





**Brown Crab**

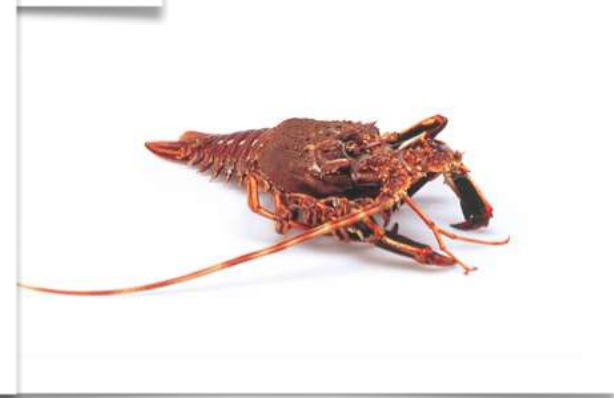


# Grilled Lobster

.....Plain or Thermidor or Newberg?

# So where are we now....?

- A huge range of molluscs
- Chilled Blue Swimming Crab from South East Asia
- Chinese Crayfish tails
- Scallops from USA, China, Peru as well as from the UK
- Rock Lobster from Australia, South Africa, Namibia, Caribbean .....





Where will we be in the future and what are the opportunities?....



# King Prawn....grown in the UK?



Penaeus vannamei





Spider Crab takes off in the UK!





Wild caught Slipper Lobster from South East Asia gives European lobster a run for its money!





**New species hit the high street menus?**



# How will we get there....?

- Innovation
- Thinking outside the box
- Learning from other countries
- Experimenting
- Trialling
- Buddying up to forward thinking Universities in the Aquaculture arena
- Lobbying
- Working with Feed Manufacturers
- Seeding - Padstow Lobster Hatchery
- Supporting appropriate MPA's
- Buddying up with forward thinking Food Service providers and Retail



# What are the hurdles here in the UK....?

- Finance?
- Feed?
- Space?
- Quota?
- Ignorance?
- Lack of engagement?
- Apathy
- Lack of vision?
- Disease?

.....**BREXIT!**



# DISEASE





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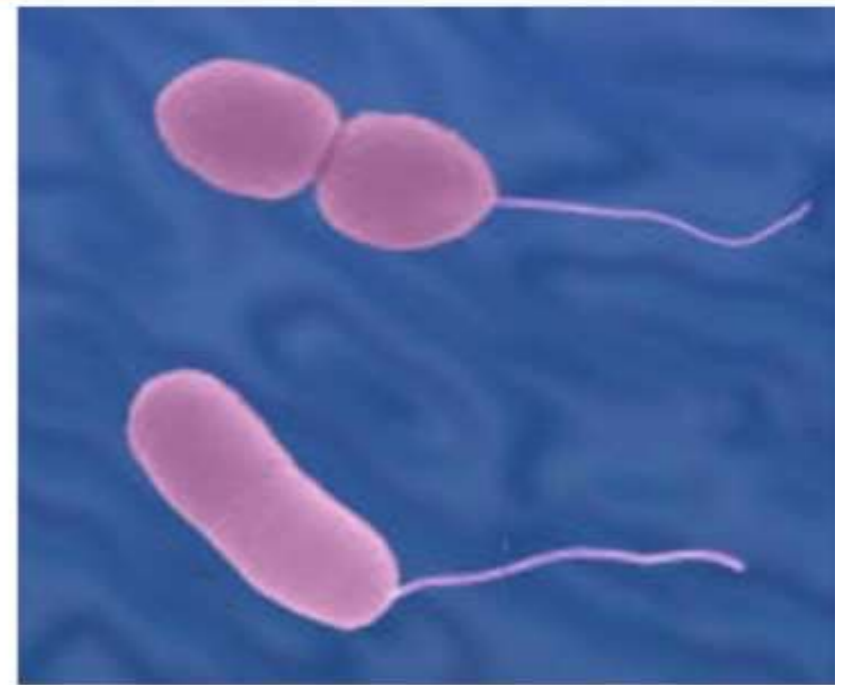
# Disease is one of the primary factors limiting growth of aquaculture

- Disease
- Feed
- Environment
- Financing
- Market acceptance
- Leadership

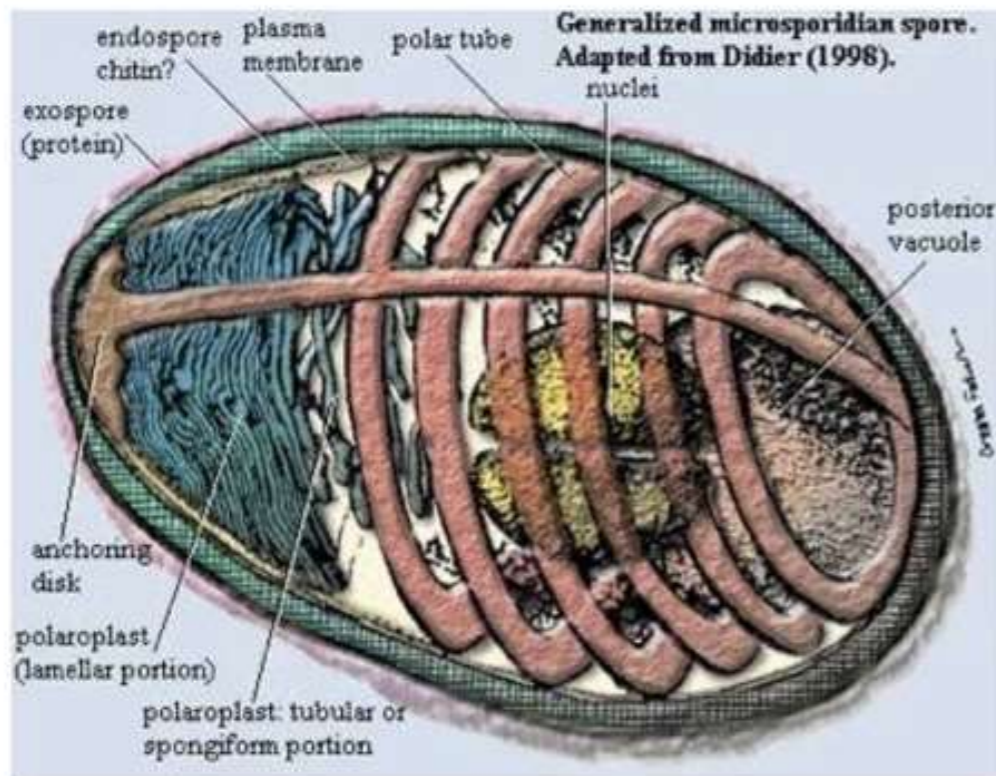


# EMS Facts

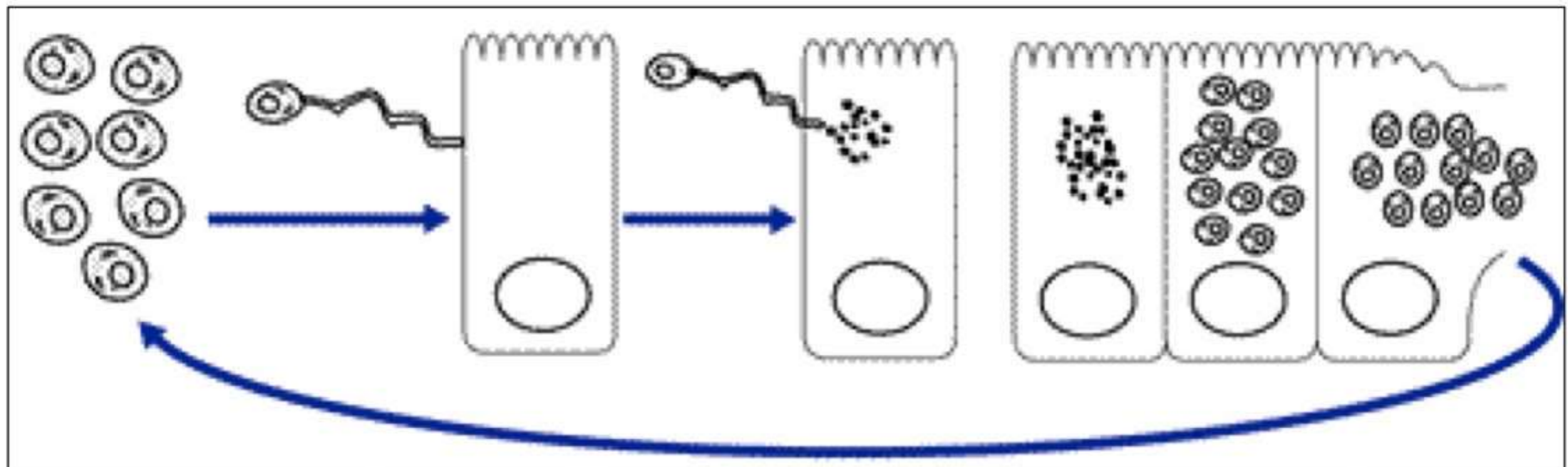
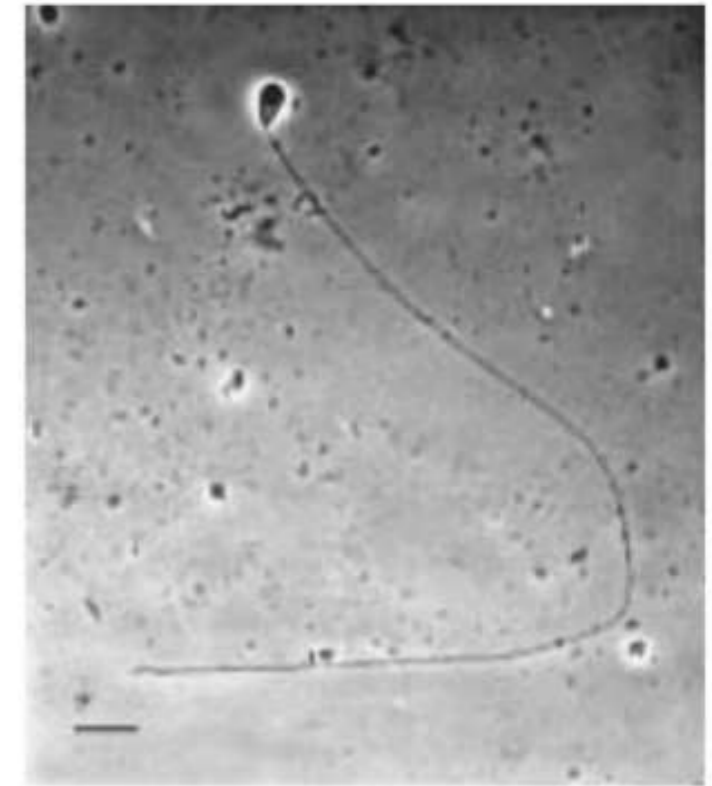
- Pathogen
  - A strain of *Vibrio parahaemolyticus* that does not affect humans.
  - Plasmid can transfer to other bacteria
- Impact
  - Catastrophic losses of shrimp, typically within the first 40 days of stocking ponds
- Transmission
  - Horizontal and vertical
  - Replicates freely in the environment (outside the host)
- Diagnosis
  - Gross signs, histology, PCR



# EHP: *Enterocytozoon hepatopenaei*

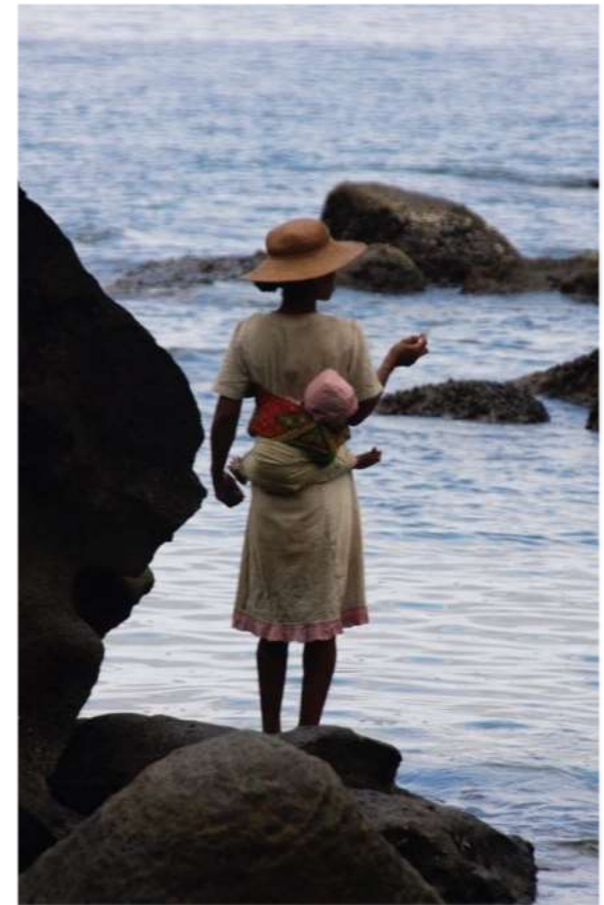


- Spore with thick wall of protein and chitin.
- Coiled tubule everts like a harpoon.
- Genetic material is injected into cell.
- Spores replicate within tubule cells of the hepatopancreas.

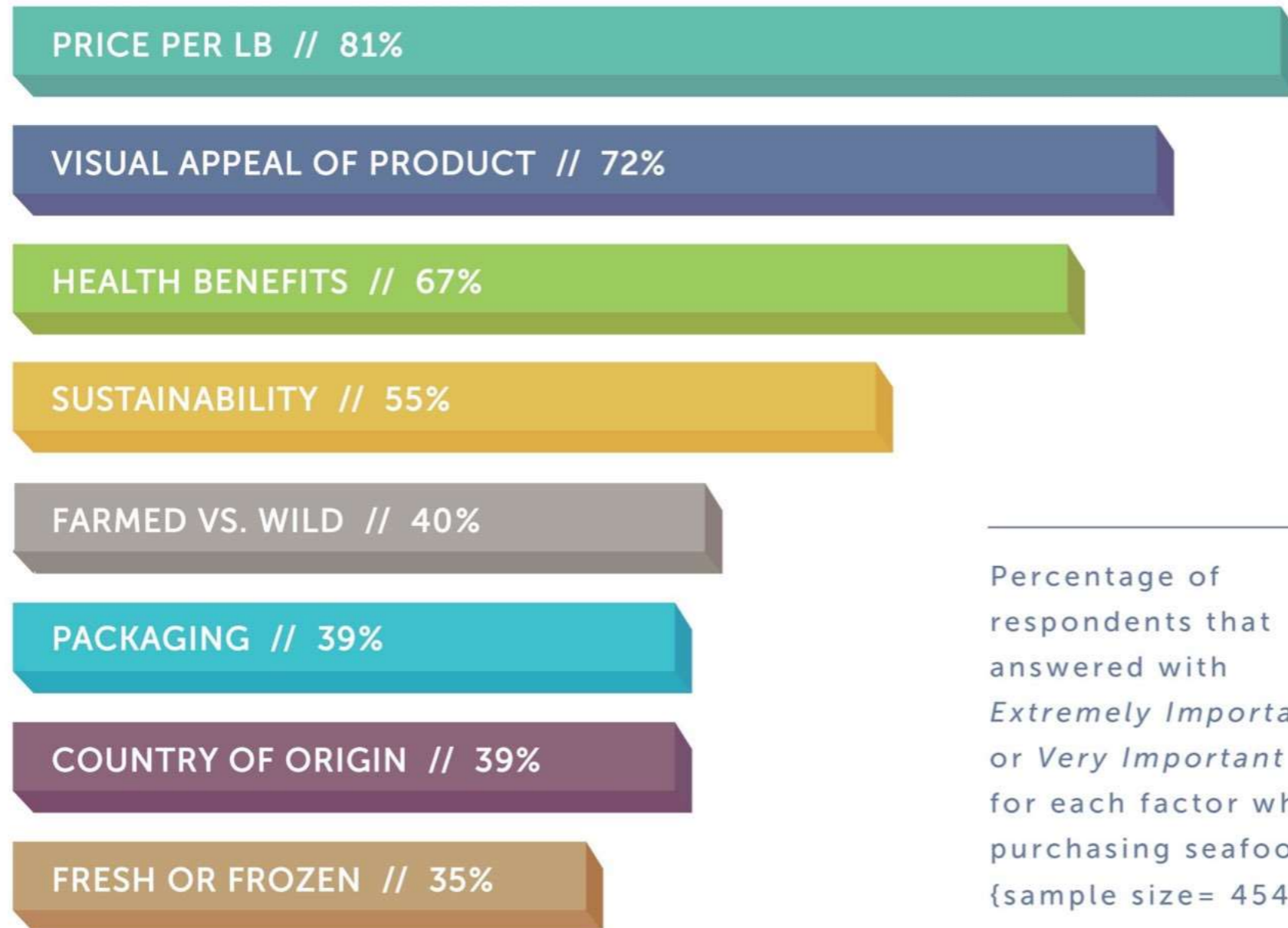


# How should we behave along the way?

- Responsibly
  - Environmentally aware
  - Sustainably
  - Integrity
  - Ethically
  - Socially
  - Informative
  - Marketing savvy
  - Engaging all Stake-holders
  - Aware of our Target Markets
  - Certified (whether Wild Capture or Farmed)
- 
- ...and as a pre-competitive team wherever possible



## PURCHASING PRIORITIES OF CONSUMER



Percentage of respondents that answered with *Extremely Important* or *Very Important* for each factor when purchasing seafood {sample size= 454}



Next major challenge for aquaculture:

## CONSUMER EDUCATION

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“ AT THE END OF THE DAY, THE PRIZE FOR  
ALL OF US IS CONSUMER EDUCATION ”

*-Wally Stevens, 2014 GOAL Conference*



## SUSTAINABLE CONFIDENCE

What factors give you confidence that you are buying sustainable seafood?

57%

THE RETAILER WHERE  
I'M PURCHASING

55%

CERTIFICATION  
LOGOS

36%

SUPPLIER  
BRAND

32%

COUNTRY OF  
ORIGIN

22%

IN-STORE MATERIAL  
(EX. PAMPHLETS OR FLIERS)



## PERCEPTION OF FARMED SEAFOOD

Do you have a positive or negative view of Farmed Seafood?

47% OF CONSUMERS HAD A NEGATIVE VIEW OF FARM-RAISED SEAFOOD.

### TOP DRIVERS OF CONCERNS

27%  
Conditions of Farm not Good

23%  
Not as Healthy

18%  
Unsure of feed/antibiotics





## PERCEPTION OF WILD SEAFOOD

Do you have a positive or negative view of Wild Seafood?

88% OF CONSUMERS HAD A POSITIVE VIEW OF WILD SEAFOOD.

### TOP DRIVERS OF POSITIVE VIEW

**33%**  
Fish in natural environment

**18%**  
Higher quality & healthier

**15%**  
Better taste



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We trained our staff and our customers at M&J



We cannot stay buried.....



# We will have to deal with the issues



# Leave the Neanderthals to their fate!





Engage our target markets...in Food Service...



global aquaculture  
the alliance



....and retail....!



global aquaculture  
the alliance



# Will it be worth it....?

- **We need to 'double in a decade' Aquaculture to get us to 2050 and help feed 9.6 billion people**

It will not be coming from land based protein



....and as of 2015 we are slightly behind schedule



So.....

- **Get on your bike and and make a path that others will follow!**





Get designing...!



Action this day!.....



...but for me ...*as I  
have now retired...*  
it's time to reflect  
...and go put the  
kettle on!





Thank you!

