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## **Producer/retailer Contractual Relationships in the fishing sector : food quality, procurement and prices**

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*New forms of competition-adapted coordination and organization have recently emerged in the fishing sector. They significantly modified the relationships that existed between the main actors of the seafood sector and also carry significant consequences on fishing practices and stock exploitation.*

*Two main reasons have led to these restructurings:*

- *Contract terms and transaction costs are undergoing significant, long-term changes because of the continual search for better quality and improved traceability, leading to novel strategies based on product quality covenants and new cooperation rationales between partners.*
- *The new strategic competition between several large- and medium-area retail groups, which defines the forms of organisation of this sector, from partnership, including various levels of commitment by upstream actors, to upstream vertical integration.*

*This paper first describes the new involvement of the retail industry in the fishing sector. Two qualitative market surveys were jointly conducted :*

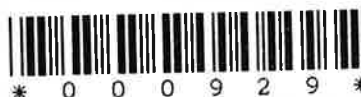
- *The first survey analysed fishing product marketing, quality and procurement, as perceived by fishermen and wholesalers.*
- *The second survey was conducted in retail chain purchase centrals and in retail stores (independent or affiliated) to try and understand the procurement, quality policies and marketing-mix practices applied to sea-food products.*

*The first part of this paper analyses the structural and strategic evolutions of the food retail sector. The second part deals with the marketing and commercial impact of food retailers. The third part analyses the types and diversity of contracts in terms of quality, procurement and pricing, from the strategic and concentration standpoints .*

**Key-words :** *Contractual, procurement, quality perception, covenants, marketing strategies, market surveys*

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## Introduction

The French general retail industry has undergone total upheaval since 1990, affecting its strategies and marketing policies alike. Indeed, several laws or regulations have boosted brand-name concentrations, gathering 45 different names into only five groups which now control the entire farm-&-food market (95% market share).

Along with this high concentration policy, retailer groups have taken possession of the seafood sector by widening their product offer and by applying a more active brand-name policy.

In factual terms, the French retailers that held < 35 percent of the seafood market share in 1990 (including 65 percent in specialised retail stores) now represent more than 65 percent of the national offer.

During the same period and especially in 1993-1994, the fishing industry suffered an unprecedented economic crisis resulting from:

- stock dwindling and price reductions,
- evolution of demand,
- the development of new marketing circuits.

The fishing industry therefore has sought to better adapt its supply to demand, through intrinsic valorisation in particular.

Now the problem arises of the true adequation of upstream/downstream strategies and of the contractual organisation of the channel, i.e., procurement, quality and prices.

This analysis was based on four quantitative and qualitative surveys conducted over a period of four years (1988-2002) along the full length of the English Channel's French shoreline and more particularly in Brittany (the number one fishing region of France) involving :

- 245 fishing Ship owners;
- 104 hyper and supermarkets.

In its first part, this paper describes the retailer structure and strategies in terms of market positioning and store procurement management. The second part describes the operational and commercial marketing impact according to brand-name in the general retail industry. Lastly, the third part defines a typology of the contracts and partnerships between the channel actors.

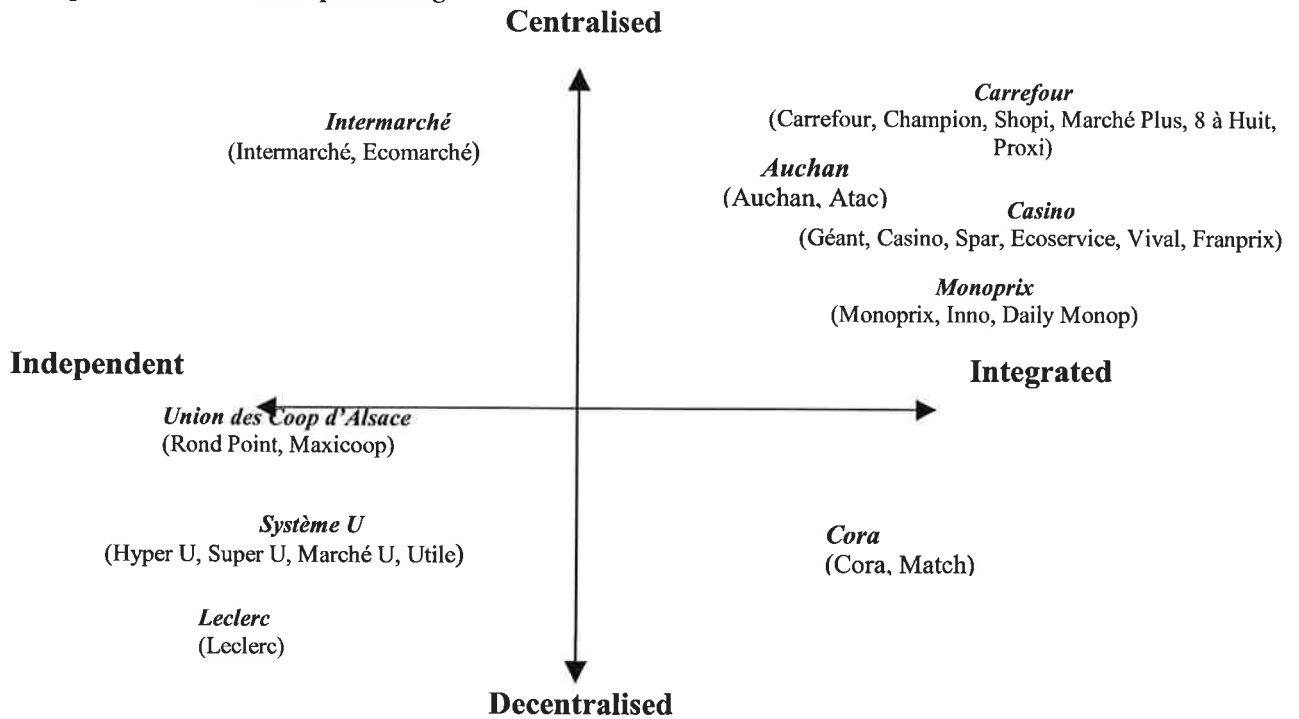
### I. Structural and strategic evolutions of the French general retailers

#### 1.1. Brand-name positioning

The seafood product policy of the general retailers has in recent years been subjected to marketing and commercial repositioning. Brand-names are now forced to redefine their procurement policy and their approach to quality, so as to be more competitive in their merchandising operations.

But all French retailers do not apply similar strategies (*graph 1*). Whether they are integrated or independent, centralised or decentralised, their contractual relationships with other actors of the fishing channel (Ship owners, fishermen, wholesalers or auctioners) are different.

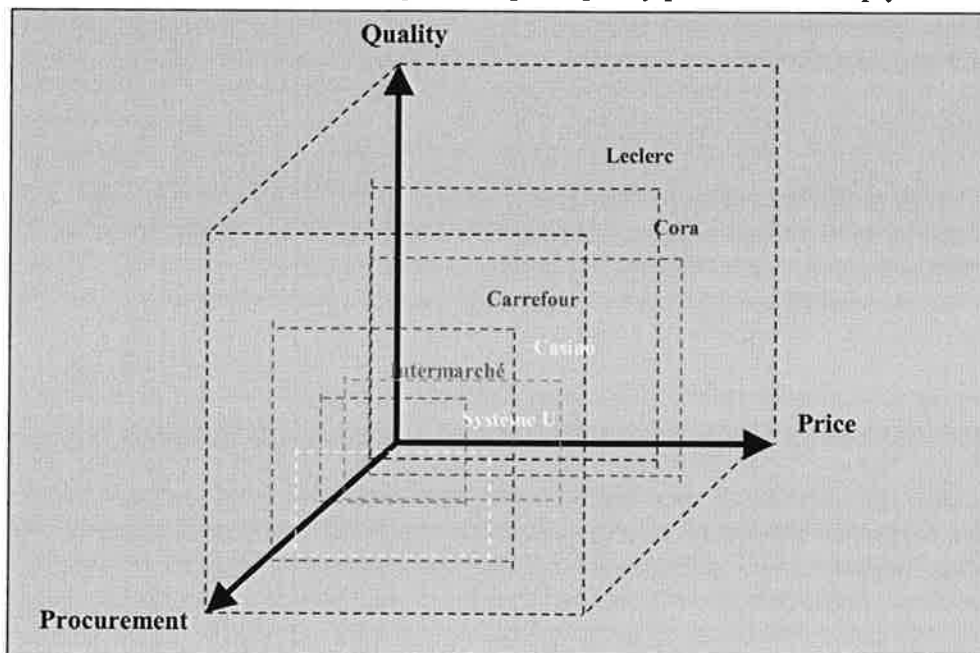
Graph 1 : French retailer positioning



Considering the positions taken by the various retailers, the French retail system remains atypical by comparison with other countries worldwide. Having, until 1996, favoured hypermarket-type stores, retailers are now focusing more on a model of small supermarkets established in fast-expanding or concentrated urban areas<sup>1</sup> (Gouin, de Carné, 2001)

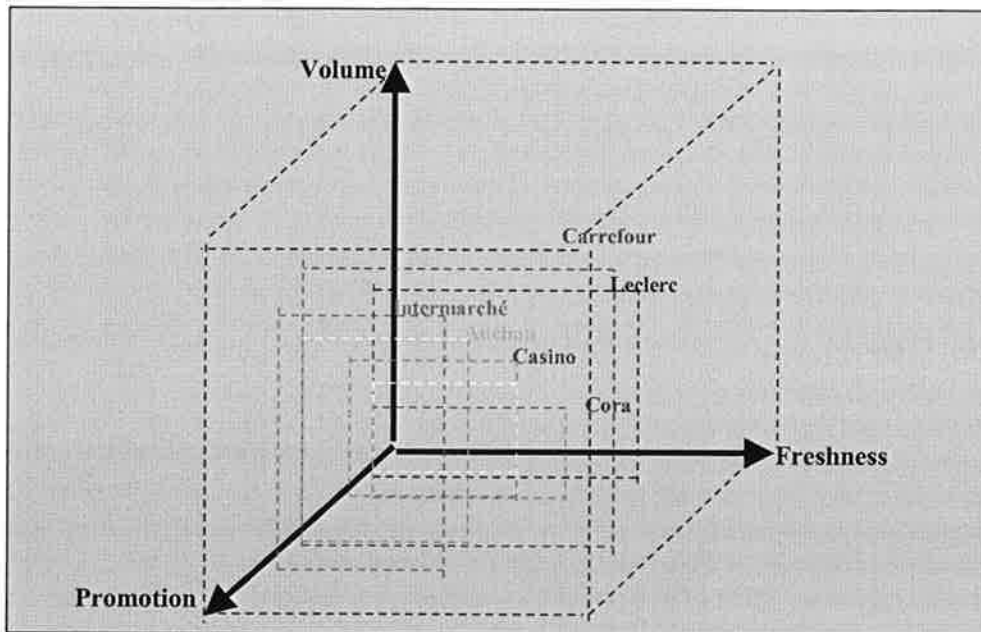
Overall, the seafood marketing and commercial policies implemented by general retail stores are heterogeneous. Depending whether the *price-quality-procurement* (graph 2) or the *volume-freshness-promotion* (graph 3) triptych is chosen, retailers take different positions.

Graph 2 : Retailer positioning according to the « price-quality-procurement» triptych



<sup>1</sup> the rationale for this choice results from the Law Raffarin of July 1996 which regulates large- and medium-area store implantations. Stores exceeding 300 m<sup>2</sup> have to be approved by the local commercial development committee (Commission Départementale d'Équipement Commercial, (CDEC). Hypermarkets exceeding 6000 m<sup>2</sup> have to be subjected to public inquiry before planning. This explains why main retailers are still favouring the development of small supermarkets under 300 sq m because they do not need CDEC approval.

**Graph 3 : Retailer positioning according to the « Volume-freshness-promotion » triptych**



Three groups can be distinguished according to their general seafood policies:

- Group 1 favours the “price-quality” policy, as Intermarché.
- Group 2 favours the “volume-promotion” policy, as Casino, Carrefour and Système U stores.
- Group 3 favours the “quality but high price” policy as Leclerc.

## 1.2. Procurement management in purchase centrals and in stores

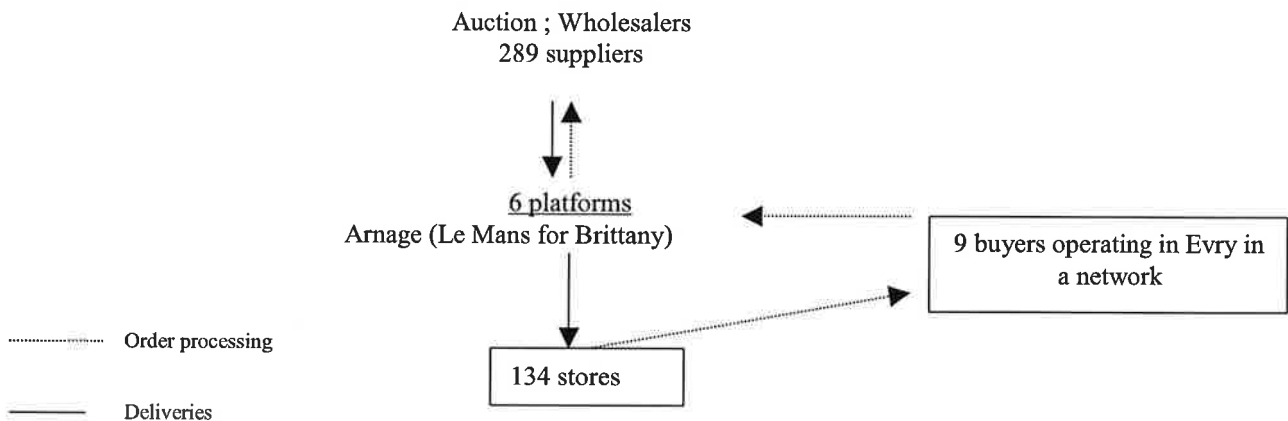
### 2.1.1. Centralised procurement

#### Carrefour

Seafood procurement is centralised in the Carrefour group. It is based on a 9-buyer, computerized network for all Carrefour stores (*graph 4*). Carrefour’s policy consists in grouping orders to optimize purchase pricing and to manage stocks from transit platforms.

Each store is free to deal with independent suppliers for more specific species that are very rarely dealt through the purchase central. That type of direct procurement from a local wholesaler can only apply to ports less than 60 km away from the retail points. The department manager may then negotiate prices directly with the wholesaler, taking the current going rate as a basis.

**Graph 4 : Seafood procurement management at Carrefour’s**

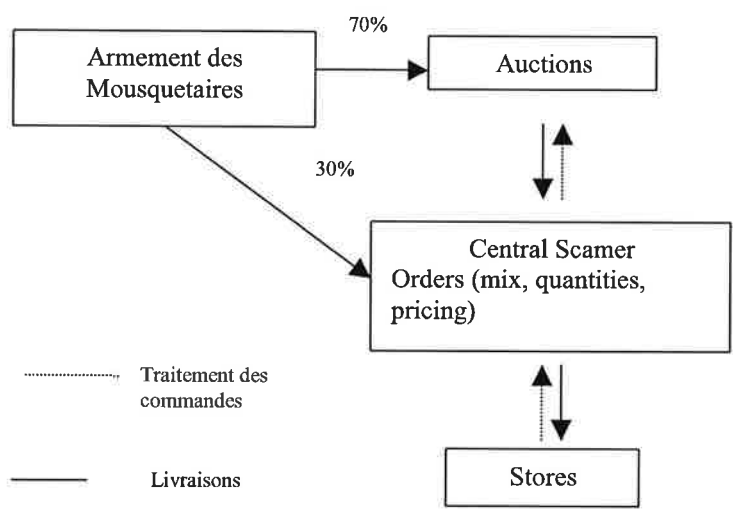


**Intermarché**

Thirty per cent of the catch landed by trawlers of Intermarché as ship owners go to the group's retail stores (*graph 5*). The 70 % balance is sold either via auction or by telephone to other distributors, before the goods are disembarked.

Intermarché's Brittany stores are supplied essentially through the Scamer purchase central, to which 70% of Intermarché retail stores, i.e., about 12,000 stores, are loyal.

**Graph 5 : Seafood procurement management at Intermarché**



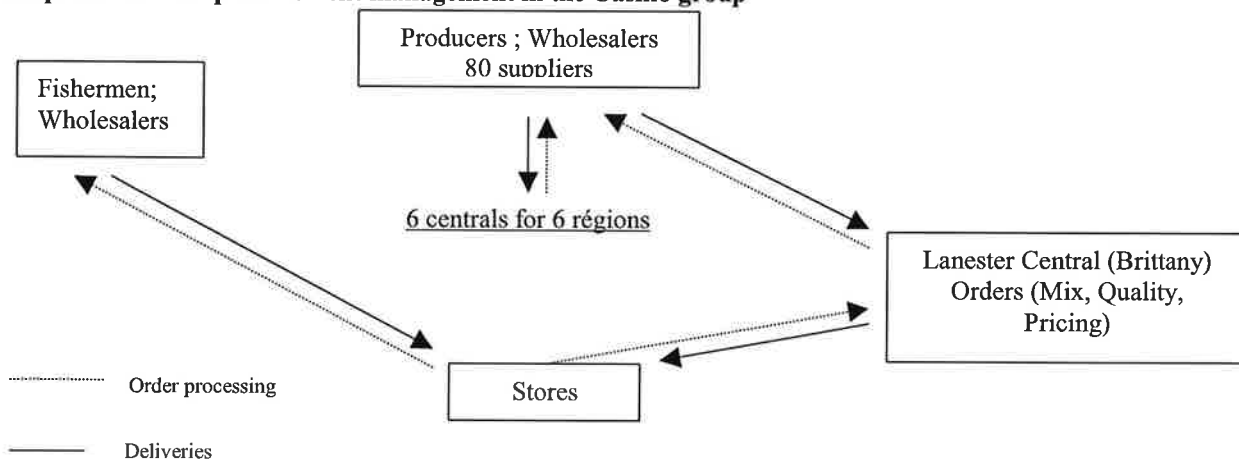
*2.1.2. Decentralised procurement*

**Casino**

The Casino group handle seafood products in a decentralised, regional manner (*graph 6*). Six purchase centrals corresponding to six clearly defined regions are thus covering the French national territory. Broadly speaking, the logistics in place is based on the just-in-time procurement principle. Fish purchased at the Lorient auction in the morning is on stalls the next morning in all southern France stores. All products processed through the central are destined for Casino retail stores.

Stores have no obligation to deal through the centrals. However, a central may protest against stores that too often refuse its services. Direct procurement therefore can only be episodic or reserved for less common products.

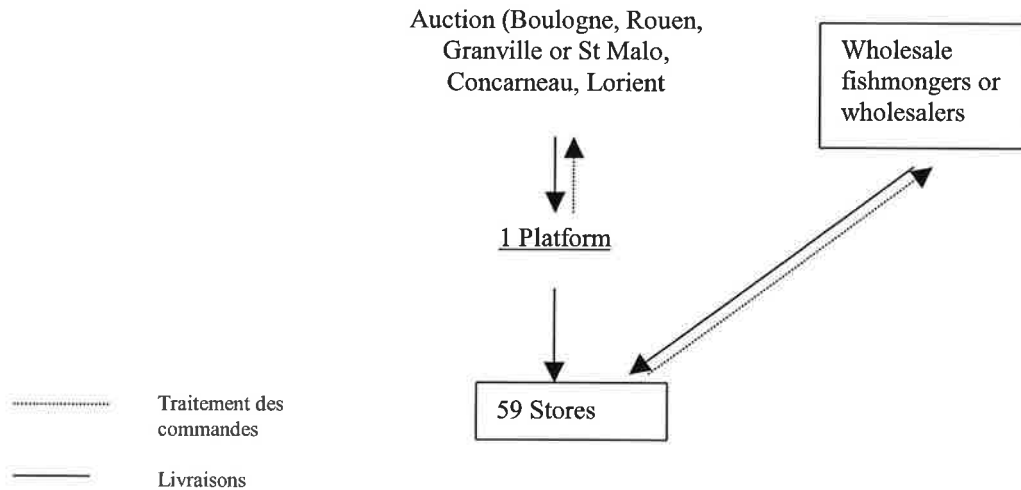
**Graph 6 : Seafood procurement management in the Casino group**



**Cora**

Cora stores in Brittany use only direct procurement (*graph7*). A national-level platform trial was setup for 3 out of 59 Cora stores. There are two types of intermediaries between fishermen and stores : semi-wholesalers (Amehasle) or wholesale fishmongers, depending on the product range. Logistics is handled by the wholesale fishmongers. Stores operate on a CIF basis, i.e., cost prices inclusive of all logistic costs.

**Graph 7 : Seafood procurement management in Cora stores**



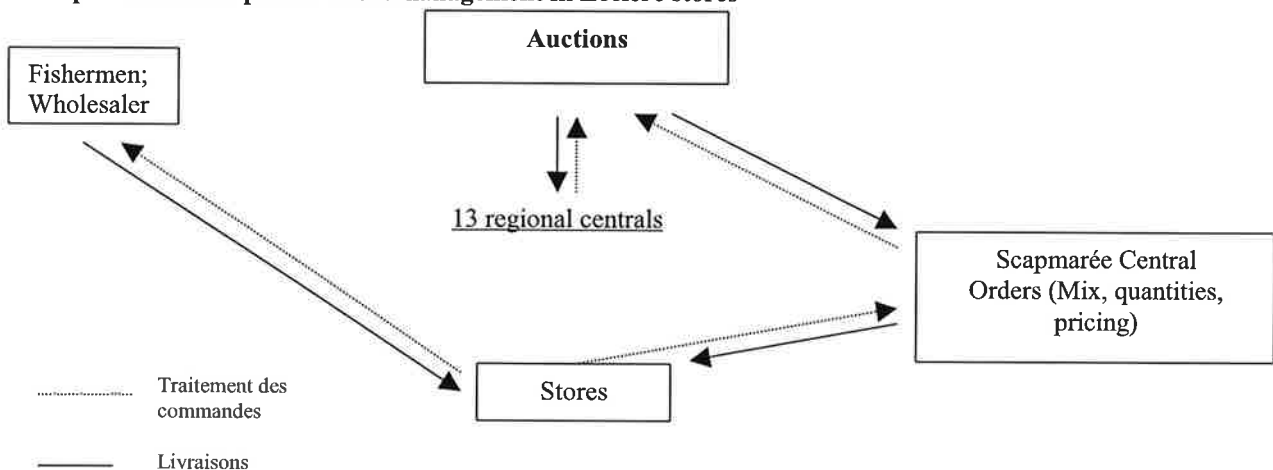
**Leclerc**

The Leclerc brand name being that of independent stores, ordering is part of department managers' responsibilities. Department managers do not have to deal through the regional central. All that centrals need to do is to convince stores to purchase their fish through them. There are 13 regional centrals in France, covering the entire territory. The Scapmarée company purchases produce directly from auctioners without dealing through the Rungis national interest marketplace, and directly supplies the stores. (*graph 8*). The number of intermediaries is thus relatively restricted (boats → auction → Scapmarée → stores).

One operating peculiarity of those centrals is that all stores will purchase a given item at the same price, regardless of the distance that separates them from the central. Eighty percent of stores use Scapmarée as their procurement source.

Products coming from the central are exclusively destined for Leclerc retail stores and, recently, Système U stores.

**Graph 8 : Seafood procurement management in Leclerc stores**



Retailers' procurement policies vary according to their structures and positioning (Gouin, Fady, 2000). Most retailers are conscious of the difficulty of implementing and following a definite procurement policy. Also, getting away from affiliated circuits requires that new relationships be established with the fishing industry through partnership contracts (*table 1*). That policy induces sensitively different marketing mixes between retailers.

**Table 1 : Procurement policies of the French retailers**

Procurement	Centralised		Decentralised			
	Carrefour-Champion	Intermarché	Géant-Casino	Cora	Leclerc	Système U
Number of suppliers	150 suppliers	25 boats	90 suppliers , incl. 80 from Brittany	139 suppliers	80 suppliers	300 suppliers incl. 50 from Brittany
Partnership	No upstream integration	Own shipping boats	Draft partnership contract with ship owners	Partnership with producers of three species (oysters, tuna and salmaon)	No upstream integration	Partnersip with two fishermen
Number of regional platforms	6 centrals Armage in Brittany	6 logistic warehouses. Scamer for Brittany	6 centrals Lanester for Brittany	No centrals National platform trial	14 centrals Scapmarée for Brittany	
Purchase from the central	90% coming from the central	70% of stores supplied by the central.	70% of fish coming from the central	Direct purchase	80% of fish coming from the central	75% of fish coming from the central
Delivery times	A for B A for C for all mediterranean fish A for H for FQC	A for B	A for B	A for B	A for B	A for C A for A with whole fish
Freight cost according to store/central distance	Identical in all areas	Identical to nationwide	Identical in all areas	Identical to nationwide	Identical in all areas	Identical in all areas
Number of items	20/80 rule required	Not mandatory	Imposed by the sector	Not mandatory	Not mandatory	Not mandatory
Prices	Not mandatory Prix maximum pour : sardine, lieu noir et crevette d'élevage	Not mandatory	Recommended and validated Mandatory for some products : tuna, langoustines, mussels	Not mandatory	Not mandatory	Not mandatory
Standard department layout	Mandatory : Consumers' world	Department individualisation	Imposed by the sector	According to geomchandising	Not mandatory	Not mandatory
Promotion/enhancement schedule	45-day notice	Depending on media : from 3 days to 2 months ahead.	2 months ahead	3 months ahead	2 months ahead	2 months ahead
Department enhancement frequency	1 per month nationally 1 per month regionally	2 to 5 per week	1 every other week	1 per month	2 - 4 per year nationally 1 every 3 weeks regionally	1 per week
Retailer's brands	Filière Qualité Carrefour	Gulf Stream Odyssée Pétrel	Terre et Saveur	Engagement dès l'origine	Amiral de Bretagne Nos régions ont du talent	
Management of centrals	Carrefour	ITM	EMC distribution	Provéra France	Lucie	Lucie

Source : A. Jaïs Nielsen, A. Lipchitz et S. Gouin



## **Operational marketing impact on fishing**

### **21- The surveys**

#### *211- The sample*

The data on which this analysis was based were collected during four qualitative as well as quantitative surveys conducted over a four-year period (1998-2002) along the entire French coastline of the English Channel, and more specifically in Brittany (France's number one fishing region) in 104 large- and medium-area retail stores (LMAS).

Two types of surveys were conducted, beginning with a qualitative one using the leading interview method, in the various purchase centrals of French retail chains: Carrefour, Intermarché, Leclerc, Casino and Cora. That survey was then supplemented with a study of end-consumer retail prices applied in LMAS in Brittany. Seventy-three (73) seafood buyers from all retailers were interviewed over a five-week period. Brittany was chosen for several reasons. Firstly, retailers Leclerc, Intermarché and Système U are strongly anchored there. Secondly, their seafood consumption index is above the national average (106 vs 96 in the Paris region). Lastly, its coastal situation favours procurement from direct suppliers. So the proportion of purchase from centrals in relation to direct purchase was all the more interesting to analyse.

#### *212- The methods*

Large- and medium-area store managers and executives were interviewed using two types of questionnaires. A permanent questionnaire involved the procurement methods applying to the various species : origins, fishing techniques, relationship with the fishing industry, quality criteria on purchase, logistics. And then, that survey explored produce availability to consumers: delivery, number of items and promotional techniques. Lastly, the third part of the questionnaire addressed consumer communications criteria and pricing. These data were supplemented by a weekly questionnaire that permitted individual follow-up of store procurement evolution. Prices, volumes and profit margins were documented (e.g., 21,900 pricing items). Some questions were also aimed at knowing whether products were being enhanced, if they came from the central, from direct suppliers or from imports. Each person was required to fill out that questionnaire over five weeks.

#### *213- Selection of subject species*

That selection was designed to reveal the strategies applied by retailers to such specific products as those derived from fishing.

The study involved 10 species most of which are considered as upmarket. It is difficult, in more common species, to identify the procurement policy of a store because these products are often used as attractive cost-price items. They are sold in large volumes at promotional prices with very little profit to the stores. With more expensive species, the procurement policy characterises each retailer; just as promotional methods and the ways of highlighting these products on display stalls. Conventionally fished, sole, monkfish and red gurnet appeared interesting from a local procurement standpoint. Sea bream and sea bass appeared as a good choice for representing products from fish-farming and wildlife fishing. Then more common, industrially fished bottom species completed the study. Halibut, subject of worldwide exchanges, was also retained. So, the ten species that formed the basis of this survey were : fish-farmed sea bass, wild sea bass, fish-farmed sea bream, wild sea bream, Emperor, Monkfish, Red Gurnet, Sabre, Sole.

#### *22-Analysis of retailer strategies*

The analysis was based on three main axes corresponding to the three most relevant concerns of seafood marketing: procurement, pricing and quality.

The centralised or decentralised status of a large- and medium-area stores, which came out as the factor explaining most of the above variations. That factor can sometimes have less weight if the integrated vs independent criterion is ignored.

#### *221-The main types of procurement*

As developed in the first part, the various retailers can be classified according to two main criteria : channel integration or centralisation levels.

The latter criterion underlines the importance of seafood product procurement through centrals in the various retailers.

Certain retailers have specific procurement strategies for seafood products.

For instance, Casino mostly operate as a platform and through a purchase central for their procurement. That retailer appears to be highly decentralised with regard to seafood procurement.

They can therefore be classified according to that centralisation and rated for their procurement strategies (Jais-Nielsen, Lipchitz 2001). The scores obtained in consideration of the procurement peculiarities of large- and medium-area stores as a result from seafood specificities are as follows :

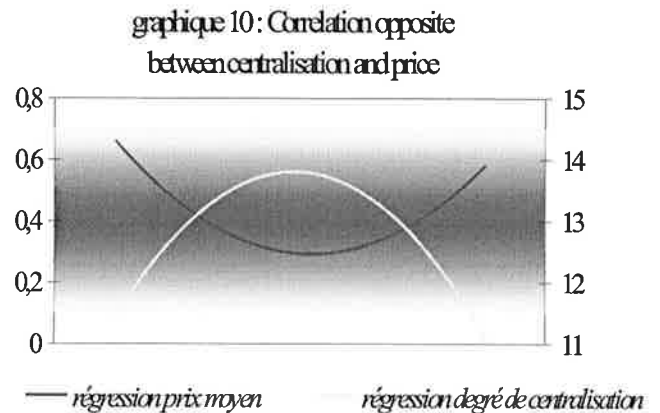
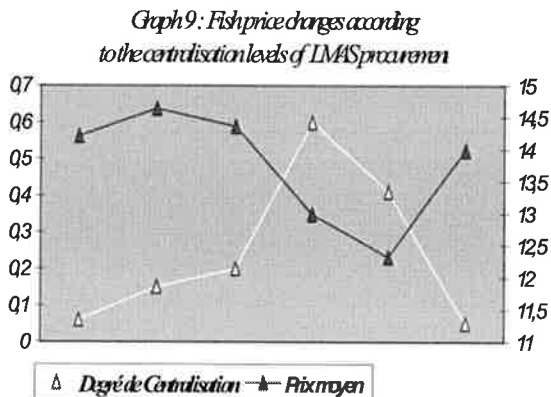
**Table 2 : Centralisation level of general retailers**

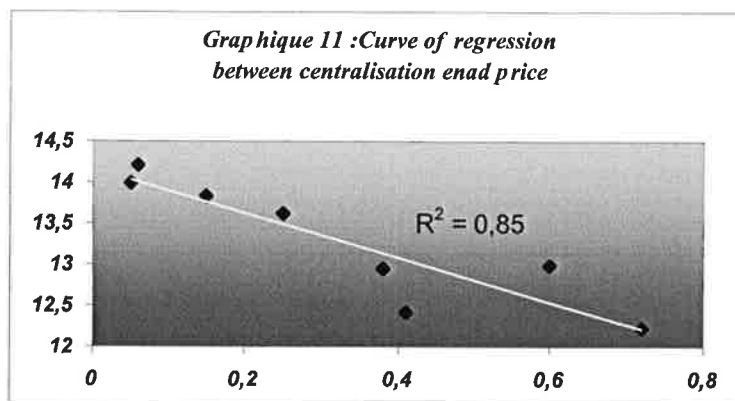
Main French retailers	Centralisation level
Super U	0,52
Casino	0,2
Leclerc	0,06
Carrefour	0,6
Intermarché	0,41
Cora	0,05

**222- Pricing, profit margins and promotions.**

Statistical analysis revealed a strong correlation between the concentration levels (Jais-Nielsen, Lipchitz 2001) and the pricing and margin policies of the retailers (*graph 9*).

The correlation coefficient of - 0.8 or even -0.85 (hors ITM) for pricing reflects a high negative dependency between the prices recorded on the stalls of LMAS and their procurement policies (*graph 11*). The greater the centralised purchase of a retailer, the lower the retail prices.





Régression :  $Px_i^* = -2.3 I_c + 14.18$

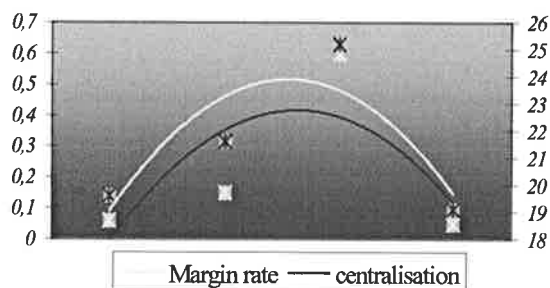
Likewise, the correlation coefficient was particularly high (0.92 *graph 13*) when testing the centralised or decentralised status in relation to the profit margins of LMAS. It appears that not only centralised chains are able to apply low retail prices but they also enjoy higher profit margins than decentralised retailers.

Régression :  $Fp_i^* = 1.38 I_c^{0.49}$

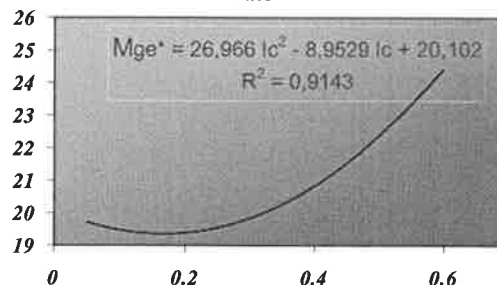
However, Intermarché sticks out as the only retailer integrated in the fishing industry channel (low prices and low profit).

Lastly, centralised retailers can apply more aggressive communications and marketing policies to seafood products, as they are scheduled by the centrals (Gouin, Boude, Charles, 2002). So the adequation is almost perfect between the centralisation level and the frequency of promotional actions (0.91).

**Graphique 12 :**  
Corrélation entre centralisation et taux de marge des GMS



**Graphique 13 :**  
Regression between concentration margin rate



Régression :  $Mge^* = 26.96 I_c^2 - 8.9529 I_c + 20.102$

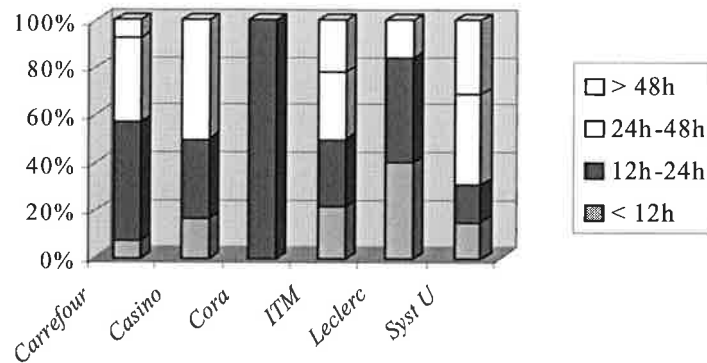
### 223. Quality

#### - Freshness

Several variables are to be considered in quality definition. Beside the intrinsic quality of fish, its selling quality depends on its freshness. But freshness depends above all on a measurable quantitative variable, i.e., the lag phase between disembarking and display on the stall, as well as the duration of offer. Results differed according to the procurement mode of the stores. The average time was 12-24 hours.

Leclerc, for example, have very short time intervals ; Carrefour and Intermarché, Casino and Système U are also in the average (*graph 14*).

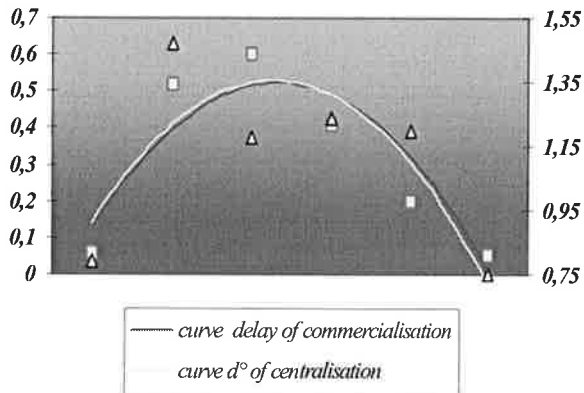
Graph 14 : Procurement times according to retailer



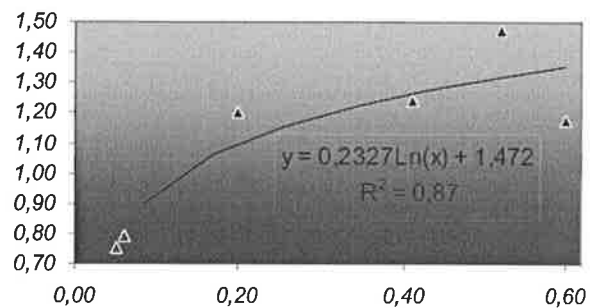
Centralisation induces longer delivery times. Leclerc, with their decentralisation policy, are the shortest, whereas Carrefour, Intermarché and Système U have longer delivery times. But all do not operate in the same way.

Some buyers purchase whole fish directly from the auction place, for which a purchasing license is required. Fish control is then very accurate and buyers are well aware of the quality of their purchase. By buying products at 6:00 am and selling them at 9:00, they are able to reduce delivery and display times considerably. Some buyers found another way to assess the quality of products without the hassle of applying for a buying license. They attend auctions and instruct the wholesale fishmongers who are buying on their behalf. Among all the stores we interviewed, only a handful of independent stores held a buying license (Leclerc and Intermarché stores). That accounts for the clear correlation noted between procurement methods and landing-display intervals (*graph 15*).

Graphique 15: Corrélation between centralisation and delay of commercialisation



Graphique 16 : Regression concentration Delay of commercialisation



Régression :  $D_i^* = 0.23 \ln(I_c) + 1.172$

-Approach to quality

The various surveys also revealed differences in approaches to quality. Some retailers have developed their own Distributor's Brands and/or established partnerships with producers, through the co-signature of charters or the creation of labelled standards (Charles, Boude, 2001).

Only the independent retailers pledged to communicate on fresh product distributor's brand names : Intermarché with Pétrél, Odysée and Gulf Stream, Leclerc with Amiral de Bretagne. Intermarché, however (integrated) use a strategy of independent, powerful brands according to product segments.

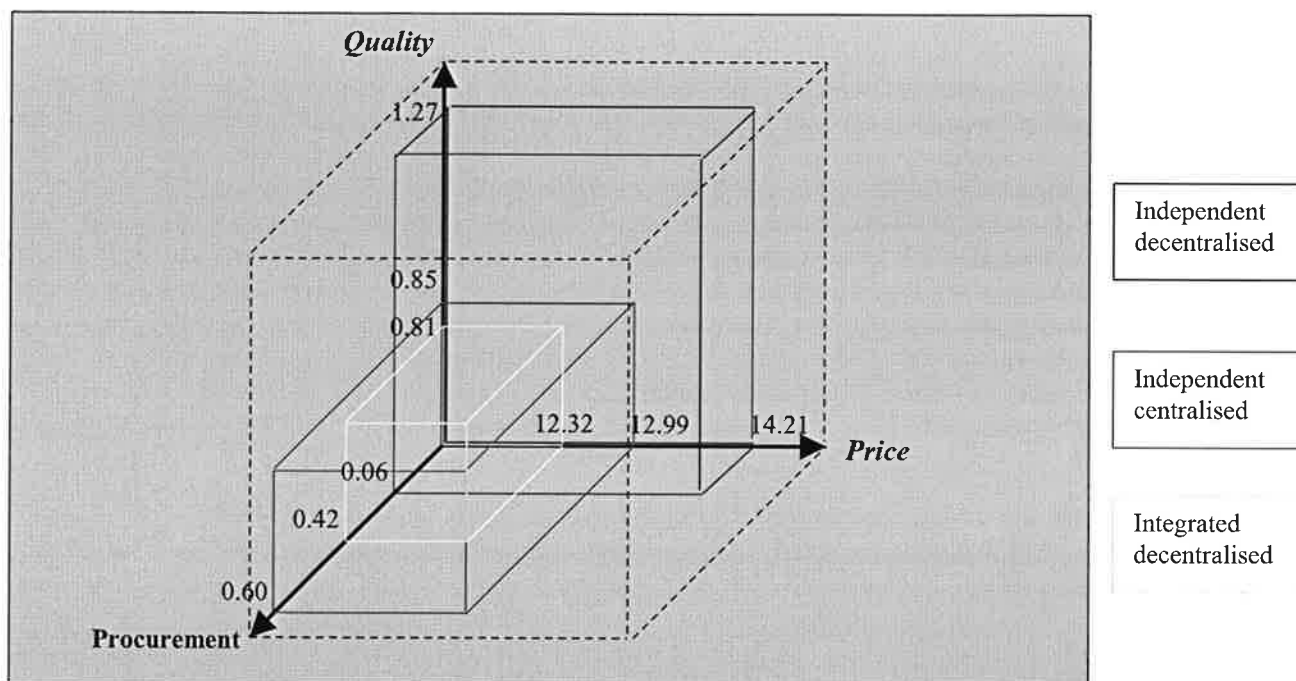
Nonetheless, a clear trend can be identified: the source or control of seafood quality specifications depend on the level of centralisation (Gouin, Boude, Charles, 2003).

In contrast, decentralised retailers favour high quality, strongly typed labelled products or collective brands developed by local producers (Charles, 2001).

However, particular purchase behaviours may appear according to the distance between the store and the coastline (Charles, Paquotte, 1999). A more quality-oriented policy must be applied by stores that are close to the coast.

### III-contract and partnership typology between the fishing channel actors

Graph 17 relates the various strategic positions held by French retailers according to the "pricing-quality-procurement" triptych.



Graph 17 : Relative weight of the various transaction components on the seafood market according to retailers' organisational strategies.

In the pricing axis reflects the average retail prices applied by LMAS during the subject period. The further from the origin, the higher the prices. The quality axis reflects the quest for better intrinsic quality of products, through freshness and quick display for sale after landing. The further from the origin, the better the index, hence quality. Lastly, the procurement axis reflects the level of procurement centralisation. The further from the origin, the more centralised is procurement.

- Those results show that decentralised, independent retailers favour the quality but high-pricing.
- Independent but centralised names favour integration with a powerful brand-name policy (low-price and medium and low quality).
- Lastly, integrated centralised favour choice, medium quality and competitive price.

Considering all the surveys and analyses conducted on valorisation approaches in the fishing industry, either upstream at the producer level (Charles 2001) or downstream (Gouin, Charles, Boude, 2002), it is now possible to define a typology that takes into account the strategies of the various actors, their primary determinants in transactions, and thus highlighting the types of contracts and partnership arrangements. The latter are bound to develop in future.

Indeed, table 3 provides a synopsis of contractual relationships between the various actors of the fishing channel. Lines indicates the type of approach and the characteristics of contracts according to the initiating actor.

- When the contractual approach is initiated by fishermen, there is a true determination to develop a quality policy based on the specific or improved offer. The whole approach is based on the intrinsic quality of a product as the only source of added value. The typicality of the profession seems to be the main basis to justify high-price seafood products (selective pricing). Fishermen organise themselves by promoting the origins and peculiarities of their craft, as warranting extra-freshness and top quality. Such is the case with the « ligneurs de la pointe Bretagne » and « Bretagne Qualité Mer ». Products from that source are preferentially displayed on decentralised stores such as Leclerc or Cora or alternatively in specialised stores like fishmongers.
- When there are bilateral, contractual relationships between fishermen and distributors, the induces a "quality charter"-type targeted offer or a more basic offer of reference. Such an approach is mainly initiated by centralised, affiliated names. He is based on a mass strategy positioning on a market price. By resorting to the "quality-charter", retailers can guarantee product quality and traceability. They are thus in a position to better respond to their local customers' expectations with the targeted offer while ensuring at the same time regular and well-organised procurement. Carrefour and with their « Filière Qualité », Casino with their approach to quality « Terre et Saveurs », Cora with their « Engagement dès l'Origine » have become standards of reference for seafood products. That bilateral relationship approach also applies to an offer of reference relaying a more on a basic quality. It enables retailers, the centralised ones in particular, to extend their basic product offer to a clientele more concerned with prices, attraction prices and promotions in particular.
- When distributors are the initiators of the contractual approach, two situations are to be considered : a reference offer or a targeted offer. With a reference offer, distributors will favour a low-price policy (insertion prices) on easy-to-cook and often basic species. A more targeted approach can also be taken by some retailers. Such is the case with Intermarché and Leclerc who have initiated a true "dedicated brand" approach at market price or at low price. The distributors' aim is to gain customers loyalty. Such is the case with Intermarché and their Pétrel, Odyssee and Gulf Stream brands, and with Leclerc and Amiral de Bretagne.

## CONCLUSION

Analysing procurement policies and the various criteria which make up a marketing and commercial policy (freshness, pricing, promotions) revealed the great heterogeneity of retailers, depending on whether they are integrated, affiliated or independent, centralised or decentralised.

Certain retailers, however, appeared to be more concerned with establishing a marketing strategy based on a consistent mix. Intermarché, through their integration policy, have undertaken a real move towards transparency of their brands (Pétrel, Gulf Stream and Odyssee). Carrefour, in another way, are basing their future success on scale economy generated by strong centralisation of their stores, by products from fish-farming and a more conceptual commercial approach (meal formulas, consumer's universe).

Other retailers like Leclerc, Casino and Cora are suffering more from the absence of rational procurement of member stores. Defining a long-term policy is made difficult or impossible by decentralisation.

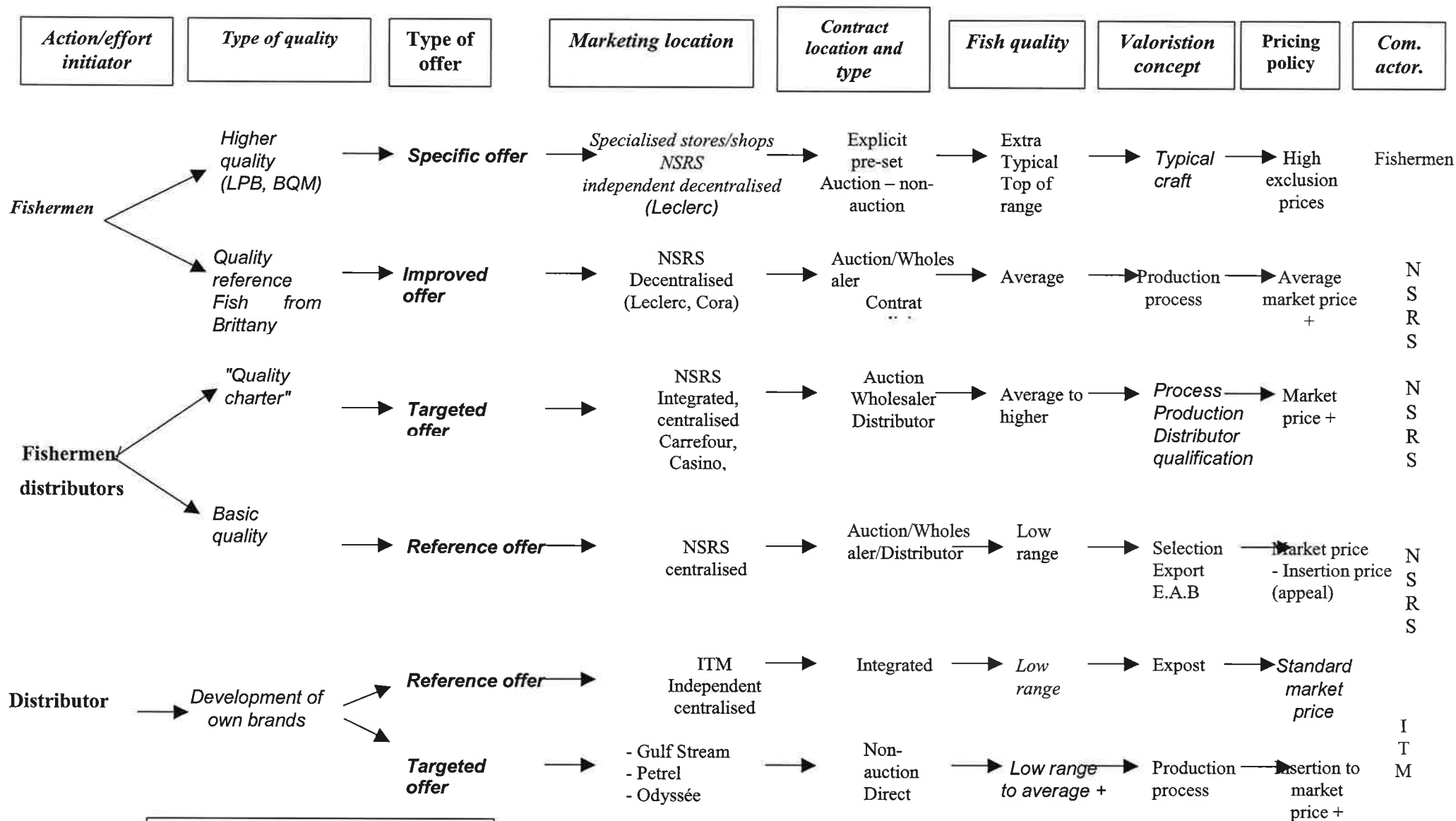
In a way, affiliated/integrated and centralised retailers take better advantage of product marketing. Retail prices appear to be more competitive overall.. However, the products offered under those retailers are usually generic and serve as attraction prices. In other decentralised names, the range of products is wider because it is left to department managers' appraisal. Direct purchase often warrants higher quality and a more favourable image. But it appears that in future retailers will prefer more centralised procurement policies, based on a more homogeneous range. The risk is however that

seafood product departments lose their specificities, whereas so far they have based their strength of species diversity. A commercial approach based on powerful brand policy and a suitable out-of-media communication would help boosting the sales of sea-derived products. To make all this possible, fishermen's behaviour needs to change. They must try and organise themselves, as much as possible, in a more structured offer and regular procurement. It will require organisational changes in fishing strategies and practices for those targets to be achieved.

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Graph 3 Typology of contracts and partnership relations between the fishing industry actors in reaspect of valorisation efforts



NSRS : Non specialised retail stores  
 LMAS : Large- and medium-area stores  
 ITM : InterMarché