

BRAND OF ORIGIN

Exploring the marketing power of provenance for Agrifood producers

A report for:



By Abby McKibben
2015 Nuffield Scholar

November 2017

Nuffield Australia Project No 1516

Supported by:



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Scholar Contact Details

Abby McKibben

Huon Aquaculture Group

Level 13, 188 Collins Street, Hobart Tasmania 7000

Phone: 0427 668 016

Email: abbymckibben@gmail.com

In submitting this report, the Scholar has agreed to Nuffield Australia publishing this material in its edited form.

NUFFIELD AUSTRALIA Contact Details

Nuffield Australia

Telephone: (02) 9463 9229

Mobile: 0431 438 684

Email: enquiries@nuffield.com.au

Address: PO Box 1021, North Sydney, NSW 2059

Executive Summary

Consumer desire to know more about the origin of their food has moved beyond country of origin labelling alone. Consumers are presented with more food choices than ever before from both retail private labels and both small and big brands. The challenge for producers to attract both brand awareness and loyalty has never been greater.

The rising consumer demand for more information to guide their food choices opens the door for producers to respond by increasing their own consumer communications and in doing so establish their value proposition to differentiate their product. By ensuring the proposition is meaningful they will build credibility and create a lasting favourable impression which will in turn deliver customer loyalty and ongoing success.

A global food landscape and a rise in the availability of information means provenance as a food term has moved well beyond place and now provides producers with a broadened central theme to highlight their uniqueness in terms of other elements linked to production and processing which is referred to as 'social provenance', and reputation and perception, known as 'cultural provenance'.

Consumers are impressionable and growing consumer trends highlight an emotional connection to food that impacts purchasing decisions. Producers are moving beyond relying on attractive logos alone and those who communicate provenance values clearly and quickly will compel purchase and drive loyalty.

Producers 'calling out' a combination of provenance values on packaging are likely to achieve a price premium on shelf, compared to those that call out either one or none.

Each provenance element appears to be valued differently. The smoked salmon category in the United Kingdom is used as case study in this research.

Valuable element variables include, but are not limited to:

- Reputation – depends on the notoriety of the chef if using as an endorsement.

- Place – if a country has more brands leveraging from the same ‘place’ that are of a higher quality, the value appears to be higher and more consistent than countries less well known for production of a product.

The use of provenance values can validate a price premium.

The Halo effect of the provenance element of place and the production method of organics appear to add immediate value to the bottom line of products and offer a premium pricing opportunity, in particular to small-scale producers or those operating in a commodity market seeking a price premium. However, consumer trends have a significant impact on the weight of various provenance values and may change both in time and across various country markets at any time.

A strong provenance identity can offer some brand protection, especially when the value is tied strongly into unique production (social) elements such as organic or farmed. However, the author notes that ‘protecting’ is as important as marketing provenance, and where an industry or regional framework is not in place, producers should consider various means of external validation to authenticate or/and to enhance their credibility such as:

- Official production certifications such as organic.
- Food awards.
- Chef or public identity (food influencer) endorsement.

This report describes, and uses, three provenance values as central themes that act as a guide in assisting producers develop brand strategy or further develop their produce by assessing the value of associating with, and the subsequent pricing proposition offered, by leveraging from one or more of the following provenance elements: spatial, social and cultural.

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Foreword

Returning to live in the Huon Valley, Tasmania, after nearly four years in Hong Kong renewed a sense of appreciation for our access to quality, locally grown, fresh produce.

My husband Josh and I both re-joined the salmon farming business, Huon Aquaculture, where we had both previously worked as Marine Farm Manager and Brand Manager respectively. Huon Aquaculture are one of Tasmania's biggest food businesses and part of one of the biggest growth sectors of food production globally, aquaculture.

As a family run farming business, Huon Aquaculture has provided me with an open environment to explore new opportunities for the business to continue to grow both the seafood and salmon category. This is how my initial interest in our salmon caviar category began and how my research into developing a more detailed understanding of best practice production techniques and consumer markets began. But there was only so much I could discover online and given the Salmon Caviar industry in Australia is only made up of two producers (Huon Aquaculture being) domestic research opportunities were limited. I was also interested in further exploring the Tasmanian provenance element of our branding framework especially with the growing discussion around how to manage the risks that come with using a brand element that can also be used by others and potentially abused by others.

Nuffield Australia provided me with the opportunity to travel and learn from other producers, both seafood and non-seafood, to gain a better understanding of provenance marketing by food producers.

I travelled to the USA, Italy, France, Ireland, Northern Ireland, Scotland, Belgium, England, China and Hong Kong to meet with various producers who are using elements of provenance to promote their products both domestically and internationally.

I will be forever grateful to both Huon Aquaculture for believing in the value of such scholarships and to my Tasmanian scholarship investors Blundstone, Roberts Ltd, Tasmanian Alkaloids and the Robert Gatenby Memorial Trust.



Figure 1: Scholar Abby McKibben onsite at the Huon Aquaculture Salmon Farm Source: McKibben, Tasmania (2016).

Acknowledgments

Firstly, thank you to my husband Josh, family and colleagues at Huon Aquaculture who have supported and encouraged me every step of the way and allowed me the time to fully embrace the full Nuffield experience each time I travelled abroad.

I would like to take a moment to thank a few of those I met who spent considerable time with me and many who went out of their way to share information about their company, industry and country. It was these 360-degree experiences that I was looking for and that provided me with more than I could have ever hoped to learn from trying to research the same information remotely in Tasmania. This is not an exhaustive list but a special thank you must go to:

- John Foss from The Chia Co who gave up time during an exceptionally busy period to meet with me, and Nicholas Lomsaney from Austrade in New York.
- NASDA for allowing me to participate in the 2015 annual conference in Hawaii and the opportunity to visit with producers on the (BIG) island of Kona.
- Elena Aniere and colleagues at Slow Food HQ in Bra, Italy, who provided not just information on the organisation itself but food culture in Italy also.
- Julia Wheelan at the University of Gastronomy for my behind-the-scenes look into food marketing and communications which again takes a 360-degree approach to food.
- Moira Ahern and family who opened their home and workplace to me and provided a true Irish experience that I will remember fondly forever.
- The team at BIM and Origin Green in Ireland (and Joe Burke for the many introductions).
- John Russell from Glenarm Organic Salmon in Northern Ireland and Gerry Cornish from The Scottish Salmon Company who gave up considerable time to share their own company stories and insights with me.
- Kathryn Stack from Europeche in Brussels for the time and introductions made to European Parliament and the European Union in Belgium.
- Lance Foreman for the incredible talk and tour of Forman and Field in East London.
- Jan Redpath and his colleagues from Angus Soft fruits who were wonderful hosts and shared both considerable time as well as useful information during the visit to the East Coast of Scotland.

I have no doubt that both my professional and personal lives will be enhanced because of this experience and I am extremely appreciative of my employer Huon Aquaculture who did realise the importance of this and supported me with the time required to complete the travel.

I would also like to thank the broader Nuffield network. From conversations over email, social media, in person at dinners and standing on boats in the middle of the Southern Ocean. This entire experience has been enhanced more than anything by the International Nuffield alumni and the common positive nature of all the Nuffield alumni I met while travelling. A special mention of thanks to my travel companions on the Global Focus Program: Fiona Hall, Matt McVeigh, Cecilia Fialho, James Terry, Nathan Free and Daniel Steel.

Finally, and most importantly, this entire experience would have not been financially possible without the support from my investors:



I have learned from and been inspired by both my Nuffield peers and all those that I have met throughout this experience - to all of you I thank you.

You have changed my life.

Abbreviations

AOC: Appellation d'origine contrôlée

ASC: Aquaculture stewardship council

BIM: Bord Iascaigh Mhara

CITES: Convention on International Trade in Endangered Species (CITES)

CIVC: Comité Champagne

COOL: Country of origin labelling

DOC: Designation of Controlled origin

DOCG: Designation of Controlled and guaranteed origin

EU: European Union

FAO: Food and Agriculture organisation of the United Nations

FRDC: Fisheries Research Development Corporation

GPI: Geographic Protection Indicator

NASDA: North American State Departments of Agriculture

OTA: Organic Trade Association

SME: Small Medium (size) enterprise

UK: United Kingdom

USA: United States of America

TSSC: The Scottish Salmon Company

Objectives

To gain a stronger understanding of provenance as a marketing tool for food producers by exploring some of the world's best known food regions and provenance frameworks.

This report aims to discuss how provenance marketing is used by some food producers around the world, and to what effect, while exploring some of the following themes:

1. Does provenance branding provide a platform for a price premium?
2. Countries or producers using and benefiting from provenance marketing and understanding why and how.
3. Develop an understanding of potential challenges arising from provenance marketing.
4. To understand more about provenance protection frameworks used around the world.
5. To make practical recommendations or raise points for consideration for producers considering using provenance elements in their own food brand marketing.

Chapter 1: Introduction

Provenance – what is it?

Provenance as a term is often solely attributed to defining place or origin and to identify distinctive qualities arising in products as a result of geography.

In the food category, provenance more commonly identifies where the produce originated from, or was made. This initial understanding of the definition of provenance is what first led to the author's selection of regions and countries to visit. The aim was to visit some of the best known geographic regions in the world for food or wine production and understand how regions have successfully used provenance from a place value point of view, to grow and market globally recognised brands and why they choose to do so.

The author observed that the meaning and power of provenance goes much deeper than the original understanding of its reference to place and as such, provides producers with more than one opportunity to build their story and point of difference to consumers. On the same note, it also comes with challenges, especially when some of the values or brand assets as they may be referred to are shared with other producers.

Morgan, Marsden and Murdoch (2009) talk about the deeper meaning of provenance, specifically with respect to food. In addition to place of origin, which they refer to as spatial dimension, a social dimension (its methods of production and distribution) and a cultural dimension (its perceived qualities and reputation). This broader description of provenance set the foundation to dissect various meetings with producers but to also use as a toolkit for dissecting provenance marketing used by the various producers in order to decipher some sort of meaningful formula or commonality.

As illustrated in a Venn diagram (Figure 2) there is an overlap between all three elements with provenance as the central theme.

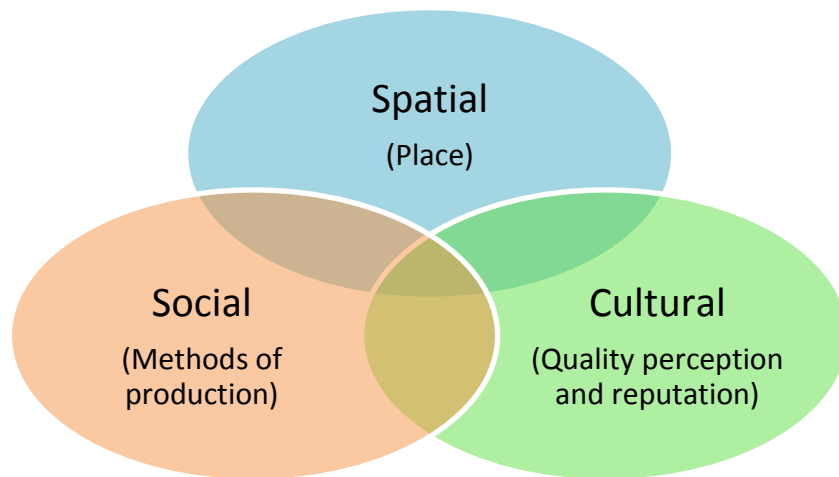


Figure 2: Three elements of Provenance shown in Venn Diagram. (Source: McKibben, 2016)

The author was particularly interested in investigating whether combinations of these provenance values discussed by Morgan, Marsden and Murdoch (2009) were seen by producers to add extra power or weight to their brands and ultimately long-lasting value of their product. If so, would this provide useful information for the author's employer, and other producers in further developing their own provenance brand framework.

Why is this topic worthy of further research and understanding for food producers? The author is proposing that there may be increased value to be gained by producers if they utilise elements of provenance marketing. As Morgan, Marsden and Murdoch (2009) wrote, *"A new moral economy is beginning to emerge around food issues, this question of provenance assumes a central importance in the food chain"*.

Branding – What is it?

By Definition; *"A brand is a distinguishing symbol, mark, logo, name, word, sentence or a combination of these items that companies use to distinguish their product from others in the market"* (Investopedia, 2016). In simple terms, it is your unique identity that consumers know you by. The identity is communicated through mediums such as packaging, websites, and advertising and, in some cases, farm gate and visitor centres.

"A brand is 'a necessary evil: they add a layer of complexity to the buying decision, but they also allow for routines ('Ah, there's my brand' or, 'oh yes, I've heard of that one'); such habits

make buying easier- automatic even” (Sharp, 2010). A brand is how food producers can strive to build a loyal following but also what consumers use to recommend or discuss with others.

Branding – What it is not

Branding is not just a logo. Branding is what a consumer associates with or feels when they see a product on the shelf or in market. Branding is not defining a product category. A brand is, or should be, unique to a particular product and create a personality that consumers will remember or connect with. In most product categories these days, consumers are spoilt for choice and at retail level only have a limited time to make their decision.

For food producers, the process of branding involves creating a unique product name and image which, in the consumers mind, aims *“to establish a significant presence in the market that attracts and retains loyal customers”* (Business Directory, 2016).

At the North American Seafood Show, Boston, USA (2016), the author heard five important elements that can be considered when creating or further developing a brand. These are:

1. Research. Understand industry trends, dynamics and preferences.
2. Speak directly to your consumer. Tell them what you and your products can and will do for them.
3. Be visible. Disrupt the category. Distinguish yourself from the herd.
4. Excite the senses. Food is an emotional category, make them drool.
5. Be memorable. Especially for those seeking a price premium. Create a product that is so desirable it is worth talking about.

The changing consumer appetite

The Australian appetite to know where food comes from is growing and the author proposes that it is this demand that is creating a platform for producers to build their own brand story.

Country of origin information pertaining to food is consistently ranked in surveys as being among the highest points of importance by consumers and most likely to *“influence their perception of value, quality, safety, cleanliness, healthiness and ethical/sustainability aspects of food and food production”* (Umberger, 2010). The author suggests this appetite for

information related to the values that they attribute to any particular country offers producers an opportunity to take consumers beyond just identifying place of origin.

According to research (Burton, 2016), *“90% of consumers perceive products made in Australia to be of good quality”*. Australian’s rank product origin as the third most important factor when making their purchase decision with only price and taste ranking first and secondly respectively.

Consumers also identified other ‘source countries’ that they trusted giving next-best ranking to “New Zealand, Italy, the UK and the US” (Burton, 2016). The author was particularly interested in the market information that leads to consumer perceiving a particular country to be of ‘better quality’ when it comes to food.

Attitudes towards countries and how consumers attach levels of preference poses many questions. Is it food quality, trust, sustainability or ethics that lead to such perception? Which is more important to consumers when weighing up the values alongside each other? Do consumers from different countries ascribe a different provenance value strength when considering how much they are prepared to pay for food?

If producers can match their own products provenance value with that of the consumers own set of personal value preferences in their country, then surely that would be a good foundation of which to build a brand?

The author travelled to meet with producers in the USA as well as producers in Europe, Ireland and the UK using provenance elements in their branding to explore the benefits and challenges they encounter. Ultimately the author sought to explore the opportunity for financial reward offered by the adoption of provenance marketing.

Chapter 2: Moving Trends

Consumer interest in provenance has moved well beyond just the spatial dimension of place as consumers seek out information pertaining to, but not limited to, other areas of the environment (sustainability), production techniques as well as those responsible for production itself.

Weber Shandwick (2014) found in a study that consumers overwhelmingly rated knowing whether food was ethically farmed or where it originated from as either very or somewhat important (71%).



Figure 3: Importance of knowing where your food comes from. Source: Food Forward Australia (Australia 2014)

As illustrated in Figure 3, the how, where and who are responsible for the production of food was found to rate as high importance to consumers. This new desire from consumers was observed numerous times through the author's study in various developed countries and regions and can be summed up as: "Consumers are not just choosing products based on where and how they're produced but now also by producers they like. Consumers want a story".

Consumer desire

The consumer desire to learn more has been slowly growing over the last decade or so. As the global marketplace becomes filled with more food products that can be distributed to every corner of the globe, "Consumers set out to select brands consistent with their own values and needs" (Future Brand, 2014).

Elena Aniere (meeting, April 2016) of Slow Food in Italy discussed the Italian producer focus on connecting with the consumer. *“We eat food because we have to, but we choose to eat the food we like”* (Aniere, 2016). Italian producers aim to meet the desire of flavour for the consumer and focus their communications on production and process techniques. Elena highlighted the Italian coffee industry as an example. *“Italians are known worldwide for their coffee, yet we do not grow coffee here in Italy, we only roast and serve it”* (Aniere, 2016). She stated that due to this coffee reputation and national pride, even global coffee chain Starbucks has been reluctant to open a store in Italy, with their first store only forecasted to open in 2017. The point was that consumers want taste; tell your consumer what your product can do to meet what they want and then, importantly, deliver on it.

The Producer opportunity. Tell a story

Guinness is one company, the author would propose, are successfully delivering on it. Guinness, one of Ireland’s best-known beverages, has created a visitor centre called the Guinness Storehouse on their original site in Dublin where, in sharing the production methods of Guinness as well as the company history, visitors are provided with a deeper knowledge of the distinguishing production and business elements. This left even the non-beer drinking author with a love for the product through knowing more about it. Looking at the elements of provenance, every element appeared to be covered through the visitor centre; place (Dublin), social (production methods and techniques), and cultural (reputation as the best).

The branding used by Guinness over the years was also on display which demonstrated their strong ability to use various provenance elements to appeal to not just their target audience but consumers in general. Emotion was used in almost every television commercial to convey stories and create a sense of community.

Guinness is a great example of how branding provides producers with an opportunity to breathe life into their product by connecting it with elements that have meaning for consumers (see Figure 4). *“By giving your products and services an identity by capturing and sharing the stories they really are, you can take your target audience on a journey they yearn to experience. In order for consumers to form a personal connection with your brand, company stories must be authentic, creative and inspirational”* (I-scoop, 2016).

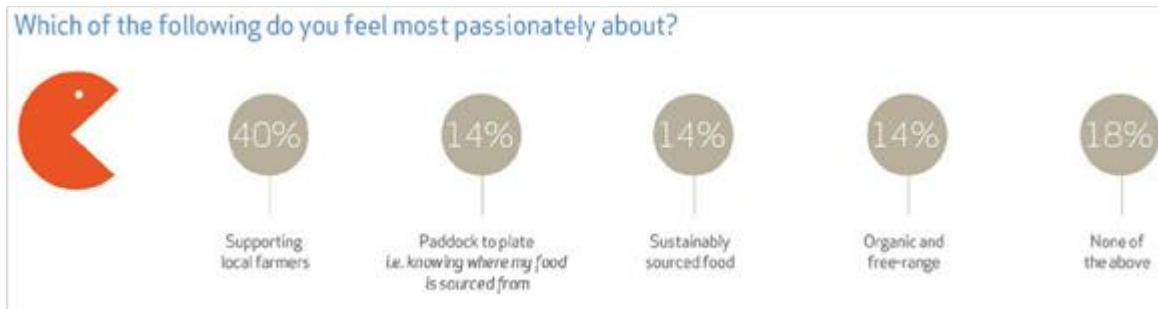


Figure 4: Values Vs Values (Source: Food Forward Australia, Australia 2014)

As illustrated in Figure 5, the quest for knowledge is providing producers across all food categories an opportunity to fulfil this rising demand from consumers by sharing their own product story, using the opportunity to build it into their brand or create a new brand highlighting distinguishing provenance elements. *“There is little doubt the Australian shopper is more knowledgeable about food and the food industry than ever before”* (Weber Shandwick, 2014).



Figure 5: Consumers want food with a story (Source: Deloitte, 2015)

The industry opportunity. Seafood Australia

For industries such as seafood in Australia, it is reported that up to 80% of seafood produced in Australia is unbranded (FRDC, 2015). Many producers in the seafood category contract grow or fish for others and as such are often regarded as price takers. Seafood to date remains one of the most unbranded food categories in Australia, due largely to the fact the majority of seafood is sold fresh behind the counter. Seafood branding in Australia has historically been the domain of packaged and processed seafood – tinned or frozen.

Yet, *“seafood products are the most highly traded food commodity globally”* (O’Donoghue, 2015) but also regarded as one of the most confusing food categories in the world for consumers when it comes to identifying product origin. From a wild perspective where seafood is caught is often not where it is processed, packaged or sold. Often it is hard to trace the origin of the product.

From an aquaculture perspective, many farmers contract grow and on-sell to processors and distributors who then create their own branding story. For example, the Simplot Australia brand John West has been a fixture in Australian homes for the best part of 50 years and today is still one of the best-known food brands, yet they do not catch or farm the seafood they sell. *“Branding is increasingly being taken on by other businesses with direct links to their fisheries”* (FRDC, 2015).

Greenpeace have called for clearer labelling of Australian seafood products and scrutinised the Australian country of origin labelling framework (See Figure 6.) *“Current labelling laws don’t require food brands, restaurants, or other seafood sellers to accurately identify the species of seafood sold or disclose where it was caught”* (O’Donoghue, 2015).

The author proposes that in light of the consumer demand for product origin and desire for a story, it is potentially a game changing time for seafood producers to begin their brand journey by building on the story of place and expanding to add additional provenance elements to their brand story.

Be authentic

While evidence suggests place is at the heart of the consumer desire, especially when it pertains to food, branding requires producers to provide a more informative story to consumers in order to be able to develop a meaningful and authentic brand. Importantly the message must meet their desires and values.

A study in the USA of 5,000 respondents found a number of new drivers *“evolving as a significant part of the purchase decision”* and, importantly, notes for producers that this is *“no longer reflects a ‘niche’ portion of the market”* (Deloitte, 2016).

Many of these evolving drivers also directly link into the three elements of provenance already highlighted in this report such as:

- Health and Wellness.
- Safety.
- Social impact.
- Experience.
- Transparency (an overarching driver).

Through visits to both emerging and developed countries in June 2015 to May 2016, the author observed a number of variables that have the power to significantly impact the value of producers depending on what countries they are from. For example, in India, the value of place was considered different to any of the other countries visited as imported product here was valued higher by locals due to perceptions of India's poor production and processing methods used locally for almost all food items.

In Italy, producers' provenance is the beginning and the end of their brand. The author travelled to Florence to visit Eataly where producers showcase their produce or wine and highlight their region, production, process, seasonality, and history all with the aim of giving the consumer a 360 degree look into their product quality before tasting it. One of the chefs the author spoke to said: *"A consumer will know it is the best quality before they try it, this is the point"* (Eataly, April 2016). Producers can even protect some or all their provenance story with a certification called Geographic Protection Indicator (GPI).

Chapter 3: Provenance Branding

As one of the best-known regions for quality food in the world, Italians have led the way in protecting the provenance element of place. However, there is a growing trend in countries like Australia to ensure consumers have the secure ability to identify where a product is really from and the Australian Government has recently re-launched country of origin labelling (COOL).

In Australia, the government has a range of logos aimed to assist the consumer as illustrated in Figure 6. The Australian Government highlighted that the *“presence of Australian retailers and manufacturers using imported ingredients and of Australian food importers has influenced the consumer demand for country of origin information”* (Fisher, 2015). This information serves to provide detailed information to address consumer concerns of product origin with a logo that acts to validate authenticity.

Country of origin labelling such as the Australian made logos were devised to meet both a consumer and manufacturer fact-based need to identify where a product or all its various ingredients are from. Provenance however while it may provide explanation of place, differs as it offers consumers a deeper understanding to describe what the impact of place has on the product quality and potentially includes messaging around the other two elements as illustrated in Figure 2.



Figure 6: Australian made packaging logos (Source: australianmade.com.au)

While COOL does identify place, is not seen by the author as overlapping fully with the provenance element of place.

Country of origin labelling does offer producers in some countries such as Australia, a cost-efficient means of validating their product origin (place - provenance) as they are able to use the Australian Made logos on packaging, as well as leveraging from a country's reputation for

quality, if it has one. The use of a country or region's positive reputation to leverage a private brand from is referred to as halo provenance.

Halo provenance theory

The halo provenance theory is of particular value to producers as when used effectively, may provide a stronger platform on which to grow and develop the rest of the product story.

When considering countries to visit, the author considered those regarded as superior to others in regards to food and beverages, and immediately thought of Italy, followed by France and Switzerland. This is illustrated to some degree in Figure 7. As the author discovered when visiting with Tom Greenwell (September 2015) of Greenwell Coffee in Hawaii, it is hard to fully leverage from a country, or in their case region, reputational strength if it is in an unrelated industry, such as beach tourism as is the case with Hawaii.

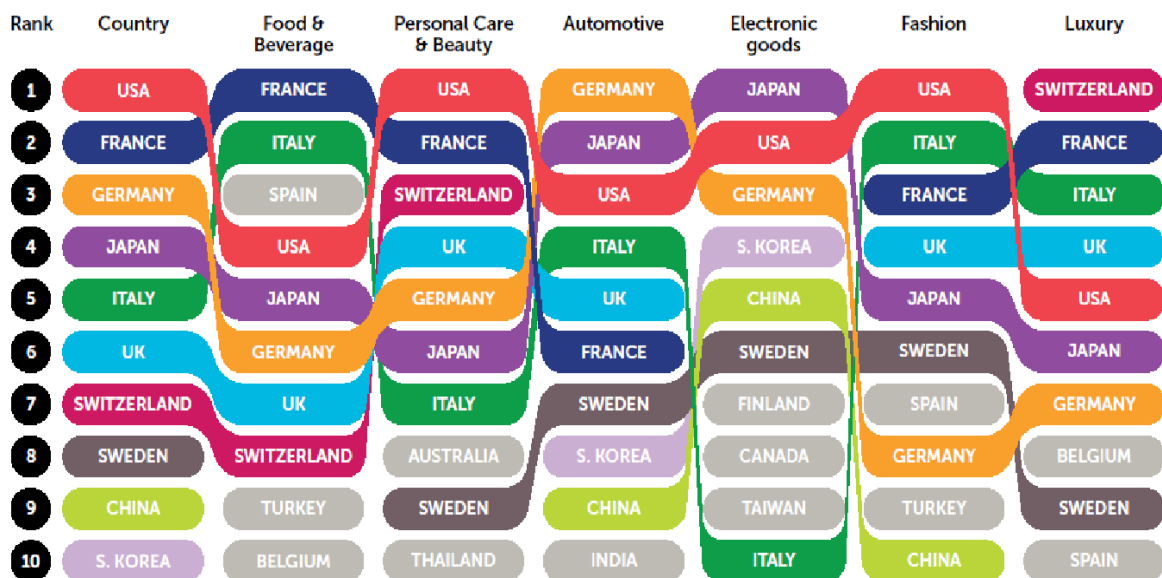


Figure 7: Country rankings across industry sectors. Source: Future Brand (2015)

Conversely, when a country's reputation relates to the product sector, the advantages of credibility by association provide many benefits. The author visited France, the country ranked top for food and beverage as shown in Figure 7, to see how producers use this country's reputation to formulate their brand (Future Brand, 2015).

“Numerous studies have emphasized the positive effects that country-of-origin confers to products, such as perceived quality, familiarity with the product or transfer of certain country perceptions and values as a halo effect” (Adina, Gabriela & Roxana-Denisa, 2014).

The Provenance Paradox

Provenance halo was a concept the author was familiar with prior to heading overseas to meet producers. Experiencing it first hand on the island of Tasmania where new food and beverage brands are appearing with a flourish, all prominently calling out place, Tasmania, on packaging and in related marketing communications. Provenance paradox however, refers to the notion that sometimes regions known explicitly for one thing can act as a negative for producers seeking to operate in an unrelated category. This can work in a number of ways as discussed here.

- Negative associations with a country or region.
 - A region or country may have an international reputation for something that has negative associations such as war in the case of countries like Iraq.
- Poor reputation for production.
 - There may be a negative perception portrayed globally around areas such as sanitation which subsequently makes export that much more challenging for producers from countries such as India who mainly sell food in the commodity space with tea being one of the main exceptions to this observation.
- Relates to a country or region’s reputation being so tied into one thing that it makes it hard for brands in a different category to build credibility.

An example of point three above was witnessed in Hawaii where, in the case of the Kona coffee industry, the challenge has been to create a new reputation for quality food and beverage production in a region that is renowned globally as the mecca for sun and surf tourism.

In addition to the challenge of forging a new reputation for a region that is not normally associated with food and beverage production, the challenge was not just in overcoming the Hawaii provenance paradox but also a much greater challenge of identifying how to make a unique mark in an industry as big as coffee. For Tom Greenwell, Greenwell Coffee, it was all in production methods and highlighting a niche. He and his team focus their branding story on

place, but specifically highlight the environmental conditions attributed to their place, their micro climate and how this positively affects their growing season. They also chose to get their farm certified organic which in itself, is a niche area of food and beverage production. By their own admission, have been successful in not only finding a loyal consumer for their branded products but also a price premium on shelf. Greenwell Coffee is priced on average 2.5 times that of conventional coffee beans (meeting, Greenwell, 2015).

While Greenwell has found success with the business and marketing model, the challenge now lies in trying to meet a growing demand for organic coffee and a rise in competition from their own state of Hawaii, as well as producers around the world, without having the acreage available to upscale production. Their focus is now on maintaining their loyal customer base and as popularity for Kona coffee grows, protecting themselves against the threat of imitations. Greenwell also sought PGI status from the Italians. it was interesting to the author to learn that European certification are able to be applied outside of the European Union.

Due to the small scale of their operation, they have also tied in their limited supply to their price premium and as Tom Greenwell (meeting, Sept. 2015) puts it: *“This coffee is like a fine wine, to be enjoyed on special occasions rather than every day”*.

Provenance trends

A desire to engage directly

As already identified in Figure 7, farm producers are already off to a good start given the rise in popularity of ‘farm food brands’. However, consumers still require more from their food marketers so that they may connect with them personally and engage with the brand. Farmers markets have largely become popular in relation to the trending desire for farm food with consumers appearing, from the author’s own observations, to enjoy speaking directly with the person that grew their food or produced it if it is a processed artisan offering such as bread or cheese.

Wholefoods in the USA has successfully adopted the farmer’s market model into that of a retail one and the author was constantly reminded of this by producers both in the US and Europe who spoke of this model as a more supportive one to that of the traditional retail landscape. John Foss (meeting, March 2016) 2001 Nuffield Scholar of The Chia Co commented

that Wholefoods provides more scope for producers to dictate their recommended shelf price provided they can provide evidence supporting such a price proposition that justifies it.



***Figure 8: John Foss, Managing Director of The Chia Co, Wholefoods Tribeca, New York
(Source: McKibben, March 2016)***

An opportunity to carve a niche

In Ireland, producers are attempting to step outside the global farmed salmon commodity market by focusing on the social provenance value in the form of changing production techniques to organic. Salmon farming globally is still a relatively new industry and is continually facing various opponents which the author proposes has created different levels of negative sentiment in some markets across the world.

As the author learned from a meeting with Donal Maguire (May 2016) at Bord Iascaigh Mhara (BIM) in Dublin, 97% of the Irish salmon farming industry is now organic with the remaining 3% currently converting. All industry is expected to be certified organic by 2018. In a country where the total volume of production is approximately 15,000 tonnes, compared to 1 million tonnes from the Norwegian industry, a unique production story is vital to the long-term success of Irish salmon industry.

Donal Maguire (meeting, May 2016) stated that while individual Irish farms may have chosen to convert to organic for various reasons, there was no doubt that those that have are now achieving a significantly higher price in market for their Irish organic salmon and focus their brand marketing efforts around two provenance elements - spatial (place) and social (production – organic). “During 2015, Irish salmon achieved an export price of \$7.90 Euro per

kg – well above the European average due to its premium organic positioning” (Maguire, 2016).



Figure 9: Abby McKibben with Donal Maquire in Dublin (Source: McKibben, 2016)

BIM support the entire seafood industry but have been pivotal in assessing how producers remain competitive in a growing market. They have been responsible for testing organic salmon in the market before committing capital expenditure to help the industry convert, once it was deemed a worth industry change in direction (meeting, Maguire, May 2016). In line with producers that the author met while travelling around Ireland, Maguire (meeting, May 2016) advised that, *“Irish salmon producers who are exporting cannot keep up with demand”*. From the author’s own observations, Brand Ireland organic salmon was viewed on a whole as the most premium when asking retailers in countries such as the USA for their opinion on global standings.

The author learned in a conversation with Marni Karlin (September 2015) of the Organic Trade Association of America in Hawaii, that the consumer desire for organic produce in America outstrips what it can produce by 3:1 so it appears the Irish salmon industry is heading in the right direction, especially as the USA remains a key export market for producers there.

Chapter 4: Benefits of Provenance Marketing - Salmon

The Scottish Salmon Company, Edinburgh

Nothing links a company brand with a country or region more quickly and more deliberately than by using it in your company name itself as with the case of The Scottish Salmon Company (TSSC).

For The Scottish Salmon Company, their provenance focus on the spatial elements (place) goes beyond product descriptions of origin. Gerry Cornish (meeting, May 2016), Chief Marketing Officer, stated: *“Our Scottish connection links us with heritage, both as the self-professed creators of smoked salmon, as well as cultural pride”*. The country’s well-known tartan pattern is used on the packaging and the Scottish mountain scenery is woven into product imagery on advertising. The tone of voice has a distinct Scottish narrative to build upon the story of Scottish heritage and tradition. Strong on pack visuals act as cues to take the consumer on a brand journey blatantly linking the product to place (Cornish, May 2016).

Of the 150,000 tonnes of salmon produced by the Scottish industry each year, The Scottish Salmon Company is responsible for 30,000. However, the lower volume of production is not the reason why TSSC choose to include provenance as a key product differentiator and make it a part of their three core principles (the other two are pride and passion). Gerry Cornish (meeting, May 2016) explains its provenance story is not so much focused purely on the place in terms of the environment, it is the heritage value in their provenance story that plays the strongest role. Gerry explained that TSSC has a distinct focus on leveraging from the already impressive reputation for salmon that Scotland has internationally, saying: *“Scotland punches well above its weight for a country of only five million”* (Cornish, meeting, May 2016).

Similar to Champagne, TSSC also has Protected Geographical Indication (PGI) as a distinct food product.

Glenarm Organic Salmon, Northern Ireland

By the author's observations, Northern Ireland is not regarded internationally for food and wine production, yet it was on the northern coast in the small town of Glenarm that the author met with John Russell, Managing Director of Glenarm Salmon, the world's second most expensive smoked salmon brand.

Glenarm Salmon farm a modest 600 tonnes of Atlantic Salmon using organic farming techniques. John's background in salmon production stems from much less humble production volumes, previously managing 50,000 tonnes of salmon production for the world's largest salmon farming company, Marine Harvest in Scotland.

Glenarm Salmon is leading the charge in the relatively young and niche sub-category of organic salmon production and testing the global market's appetite to pay a price premium for it.

Due to the small tonnage, Glenarm organic salmon only have supply for around three months of the year and export 95% to international markets such as the Middle-East and the USA. They credit their organic credentials for allowing them to be extremely selective with their customer base which suits their limited production volumes. They openly admit they cannot meet the growing consumer demand for markets such as the USA.

Finding your niche in a commodity market'

Similar to the marketing strategy of Greenwell's to sell their coffee as that for special occasions due to limited supply, Glenarm Salmon similarly promote their product with the tagline of 'elusive' on their packaging.

For John Russell (meeting, April 2016), producing salmon in the small town of Glenarm provided an obvious choice for naming the company and subsequent product range. However, as this small town in Northern Ireland is almost entirely unknown outside of the country, without a stronger, more well-known country or regional brand to leverage from, especially when Glenarm first began entering new markets overseas, new business may have almost been impossible outside Northern Ireland. It was their organic production methods which became the recognised and importantly, trusted, element of their brand that customers bought into when first discovering their products (Russell, meeting, April 2016).



Figure 10: Glenarm organic salmon packaging (Source McKibben, Glenarm Northern Ireland, March 2016)

Another comment John made resonated with the author. When asked if Glenarm had salmon industry sustainability certifications, such as ASC, John advised that he found the consumer response to organic to be all encompassing; *“It is assumed by consumers that organic producers use sound animal husbandry techniques, have a sustainable impact on the environment and in some cases, even presume a product's health benefits”* (Russell, meeting, April 2016).

Forman and Field, London, UK

In London, the author visited another smoked salmon producer assuming a price premium on shelf. In contrast to Glenarm’s reliance on the power of organic, owner Lance Forman (May 2016) described their provenance value being in heritage and reputation (provenance - culture) as the first traditional fish smokers in England. Lance advised that Forman and Field are in the process of applying for European GPI (Geographical Protected Status) to make their claim official.

Forman and Field have a strong focus on online marketing which allows them direct communication with their consumers and an affordable platform to both tell their story and sell their products. They are able to provide information about their production and process techniques, as well as offer specials to reward for loyalty. The author also attended one of their factory tours which they offer monthly to loyal customers.

Chapter 5: Promoting Provenance at Country Level

Origin Green, Ireland

In addition to the niche production area of organic, the Irish salmon industry is also further supported at country level by a relatively new organisation called Origin Green (Figure 11).

It is not ground breaking to hear a country promoting itself and its products and placing attention just on country of origin. However, similar to Eataly in Italy, Ireland has dug deeper and is the first country in the world to launch a country provenance marketing initiative which draws its credibility from an audited and tightly managed sustainability programme for its entire food and drinks industry.

For the author, Ireland is like much like Tasmania. A similar size, but with a population almost six times greater, it also has the challenge of limited land for large-scale production so finding a niche to compete on the world stage is deemed vital for future economic growth.

Ireland is a well-known country but, by the author's own observations, not as well known for food production as for its breathtaking scenic tourism destinations (another example of provenance paradox).



Figure 11: Origin Green logo (source: Origin Green, Cork Ireland March 2016)

The idea for Origin Green was born from a combined effort of seeking to lift its global reputation for producers in general terms, as well as meeting consumer needs regarding sustainable production. Research in 2008 by Bord Bia, (Gaelic, translating to Food Board), to gain a better understanding of sustainability requirements of trade customers resulted in

sustainability being included as a key long-term priority for the Irish food and drink industry and the development and launch of the Origin Green program. Fast forward eight years and 95% of Ireland's food and drink exporters have registered to take part in Origin Green.

Origin Green aims to prove the sustainability credentials of 'brand Ireland', formalising their provenance story with a fact-driven framework underpinning it. *"It is the only sustainability program in the world that operates on a national scale, uniting government, the private sector and food producers through Bord Bia, the Irish Food Board"* (Origin Green, 2016).

Origin Green actively promotes its message of sustainability globally on behalf of the various industries and certified farmers it supports as witnessed at both the Seafood Expo North America (2016) and Seafood Global (2016).

Chapter 6: Protecting Provenance

While travelling in Europe, the author observed an abundance of produce certifications, all aimed to help producers protect either place or specific production techniques. Some of these are illustrated in Figure 12.

| PROVENANCE PROTECTION FRAMEWORKS/CERTIFICATIONS |
|---|
| PDO (Protected designation of origin) |
| PGI (Protected geographical indication) |
| TSG (Traditional Specialties guaranteed) |
| DOCG (Denominazione di Origine Controllata e Garantita) |
| DOC (Denominazione di Origine Controllata) |
| IGT (Indicazione Geografica Tipica) |
| CIVC (Comite Champagne) |

Figure 12: Examples of provenance protection frameworks in Europe (Source: McKibben, 2016)

As the author continued to observe around Europe, provenance marketing at country level was likely to achieve much more success when underpinned by a supporting framework that validated producer authenticity. Epernay in France is home to the world’s best-known provenance brand, Champagne, the notoriety of the strict set of standards governed by the Comite Champagne (CIVC) have protected the members and upheld a reputation of quality and authenticity.

Place is only half the story for producers seeking to gain CIVC certification. Among other standards, producers must adhere to strict pruning techniques, fermentation and their vineyard must meet other requirements related to soil acidity levels, sunlight hours and more.

In a similar tone to the governing body of CIVC, Origin Green is working to promote not just the sustainability framework but the work by Bord Bia who conduct the farm assessments as they realise how important it is to demonstrate the authenticity and credibility of their framework.

The author travelled to Cork in Ireland’s south-west to visit the audit headquarters of the dairy arm of Bord Bia, where the team audit dairy producers on a set framework covering both

quality and sustainability. The Bord Bia team independently verifies and sets targets for the agriculture, seafood and horticulture sectors to achieve in regard to sustainability.

At a meeting with Marguerite Dillon (May 2016), team leader of 15 Bord Bia farm auditors in Cork, the author learned that there are over 100 auditors undertaking approximately 800 farm audits per week. Producers wishing to gain Origin Green status are provided comprehensive guides that describe how to adjust farm practices in order to achieve required levels of various sustainability elements required. The measures are all linked back to food safety and the environment.

Slow Food Network, Italy

For the International Slow Food network in Italy, country provenance promotion and protection intertwine. Slow Food was created initially to combat the growing rise of fast food in Italy by founder Carlo Petrini – after news of the first McDonald's fast food chain was announced to uphold the value of traditional food production. It has since expanded to include a chapter of the organisation called Presidia, which works to help protect certain spatial and social provenance attributes used by producers.

The author learned from meeting with Elena Aniere (April 2016) that there are more than 450 Slow Food Presidia members around the world. The Slow Food Presidium landmark on product label or packaging demonstrates membership of the Slow Food Italian Presidium and, therefore, producers adhere to production rules that respect tradition and environmental sustainability.

Over 13,000 small-scale food producers from 56 countries are involved and range from farmers, fishers, herders, cheesemakers, viticulturists and bakers. Their objective is to protect and promote traditional knowledge, based on respect for animals while also using seasons to full effect. Kona Coffee in Hawaii had also worked with Slow Food Presidia to protect their regional production in Kona by introducing an international bill for Kona coffee to only be recognised when 100% of the beans are of Kona origin, previously it was 10% Kona bean content.

Such examples demonstrate how Presidia projects have been implemented and resulted in strengthening local communities through beneficial economic impact and enhancing the

alliance between producers and consumers. For the Kona coffee industry, this has meant greater publicity about the authenticity of Kona coffee and a reduction in the threat of copycats and poor imitations.

Chapter 7: Provenance Marketing in Retail

Retailers have been getting in on the action with many, including the previously mentioned Wholefoods in the USA, striving to meet the consumer demand for more information by a number of new means. The author observed Wholefoods (July 2016) showcasing an image and small biography of the farmer next to the produce available for sale on shelf. Waitrose in the UK even has their own 1,600-hectare (4,000 acre) farm in Leckford Estate to accentuate the point that they are providing consumers with food from known sources (Forman, meeting, 2016).

This farm came in handy for Waitrose who were able to stream live videos from the farm to highlight their own authenticity following the publicity backlash over the Tesco Supermarket (UK) fake farm scandal which saw them create four fake farm logos to promote their private label meat produce. In doing so, Tesco gave further weight to the trend of consumers desiring food from a farm with an identity, with a story. Unfortunately, they also gave weight to the growing mistrust of consumers in correct product origin labelling by producers.



Figure 13: Fake farm Tesco's farm brand (Source: Tesco, 2016)

Many of the producers the author met with in Europe and the UK, sung the praises of retailer Waitrose as being strong in *“developing long-term relationships with suppliers and putting food traceability, integrity and quality at the top of their requirements”* (Forman, meeting, May 2016). In addition, Waitrose were the first retailer to promote local producers in a tangible way, launching a locally-produced range of products in 2002 that were only sold within a certain radius of where they were produced.

To illustrate how provenance value's play out on shelf, the author did an assessment of the smoked salmon cabinet in Waitrose to put the theory to the test, reviewing 100g cold smoked

salmon products. The most expensive product was a private label. However, the dominating 'brand' shown is internationally renowned chef Heston Blumenthal, who is succeeding in providing a cultural provenance value by that of his reputation which in turn is translating in the consumer's mind to perceived high/to quality product.

The equal highest priced product, again a private label, appears to validate the value of the wild salmon pricing model the author was made aware of while meeting producers in Ireland. The author proposes that this framework may provide completely different pricing results if the same provenance values were put up against each other in different countries. In India for example, which, by the author's observations in June 2015 appeared to price all imports as being premium due to the country's poor track record of food safety, producers focusing on the place provenance value may move to the top of the pricing model.

The author surmises that India is perhaps one of the few countries in the world to have more trust in imported food than that which is locally available.

Conclusion

The author has highlighted some of the producers visited throughout the study with the view of highlighting those that have successfully built a brand identity based on an element of provenance to create a point of difference.

Once identifying the various provenance elements in use by producers, it became apparent that specifically in the seafood category, those that choose to highlight clear provenance elements achieved a higher price point on shelf and were clear category price makers. The author observed few instances of retail private label being able to compete on shelf with producers who had clear brand identities and illustrated their unique attributes on packaging.

This study found that producers who are seeking additional product assets to promote their brand are adding weight to their story but only assets that have a direct corresponding value to consumers will receive the price premium on shelf.

The author highlighted salmon producers throughout this report, with the exception of Kona coffee producer Greenwell, and found that production points of difference with regard to organic or some other form of production technique that is underpinned by a protection framework to authenticate it, were priced higher than those that did not.

It was also observed that the strength of the relatively young Kona coffee industry was attributed not only to the success of farms like Greenwell, but in the community of producers coming together to protect provenance value of place with support from the Slow Food Network. Similarly, the success of conversion to organic by the Irish salmon industry was a similar success story of industry cohesion and working together. Such certifications were viewed time and time again to offer producers a platform for a price premium.

The move by many producers to engage with consumers directly through either visitor centres, websites or farmers markets was seen as hugely advantageous and in line with the evidence suggesting consumers want a story, and an authentic one at that. Who better to receive it from than the producer themselves?

The provenance framework studied with respect to spatial, social and cultural elements are assets worthy of research consideration by producers seeking to create their own brand and

may offer an opportunity for all producers, not just speciality food producers, to achieve a price premium. However, producers must give consideration to the specific set of values by consumers in the market they wish to sell their produce to, as these will ultimately determine a product's brand strength.

Recommendations

Branded products calling out one or more of the provenance elements discussed in this report achieved a higher price. Further study is worthwhile into other product categories to see if different provenance values achieved the same price premium as illustrated in smoked salmon.

Consumer desire should always be at the core of any producers branding activity. To that extent, producers or marketers should consider the desires and/or values of their consumers to ascertain the value of various provenance elements against these in order to determine the ultimate value. This has potential to assist with deciding which assets are worthy of greater communication or prominence on packaging.

Using observations from the study, the author considers what elements might make up the ‘perfect provenance brand’ in a hypothetical scenario, as shown in Figure 13 below.

| | Spatial | Social | Cultural |
|--------------|--|---|---|
| | -Place (Country/Region) | -Production and/or -Processing | -Reputation and/or -Perception |
| BRAND | <ul style="list-style-type: none"> ▪ French | <ul style="list-style-type: none"> ▪ Organic ▪ Artisanal / Hand-made ▪ Rare or only available for limited season | <ul style="list-style-type: none"> ▪ Endorsed by Heston Blumenthal ▪ Fourth generational family business ▪ Consistent gold medals at prominent food awards |

Figure 14: The perfect provenance brand (Source: McKibben, 2016)

Appendices

Appendix 1: Tasmanian salmon caviar vs the World

The author has explored the notion of producers in food commodity sectors using provenance elements to find their point of difference. Continuing this exploration into the underlying provenance assets available to producers to leverage from, how does a small Tasmanian producer compete on the global stage in a food category dominated by one of the world's best-known luxury foods?

Caviar, the first global food provenance story?

As Fletcher (2010) writes: *"Caviar is a globally renowned luxury seafood"*, first enjoyed by Russian Tsars and later by European royalty and first recorded in the history books around the time of 1460 BC. Its popularity largely grew as a result of its rarity and exclusiveness. A trait that is often at the root of most luxury food items (Fletcher, 2010).

Some quick facts about caviar and salmon caviar:

- Russia is the largest consumer of salmon caviar.
- USA is the largest consumer of caviar.
- France is the second largest consumer of both caviar and salmon caviar.
- Salmon caviar is the only type of caviar that is kosher because salmon have scales which is a requirement to meet kosher standards.
- Today 95% of caviar is produced via aquaculture farms.

Caviar is regarded by some as the first seafood to be marketed by origin which is usually a reflection of rarity and exclusiveness (Fletcher, 2010). The fish, sturgeon, has prehistoric lineage stretching back 300 million years. Caviar is made from sturgeon eggs alone and only fish roe sourced from the species sturgeon can be marketed and sold under the product name 'caviar' (Fletcher, 2010). All other fish roe may use the term caviar but identify itself by species first, for example salmon caviar.

Today, almost the entire production of caviar globally is produced via aquaculture production and makes entry to production more accessible to those with the right start-up capital (Seafood North America, 2016; Seafood Global, 2016).

Christian Zuther-Grauerholz (meeting, April 2016), the owner of the world's oldest caviar house, Dieckmann and Hansen in Brussels, advised that despite many well-known brands, caviar is largely sold unbranded in bulk 1kg tins to distributors who then repackage into smaller tins 10g to 100g and sold between \$3,000USD to \$6,000USD. The sturgeon species Beluga can take up to 28 years to mature and Christian advised can sell for \$6,000 and over due to its exclusivity. When questioning Christian about the flavour of Beluga caviar compared to other caviar from four-year old sturgeon and what makes Beluga so special he replied, *"It's the caviar"*, insinuating that its exclusiveness alone was worth the increased price.

Due to the increased production of caviar through aquaculture, the industry has seen new brands entering the global market. However, as observed visiting Seafood Expo Global in Brussels (April 2016) and Seafood Expo North America in Boston (March 2015), the historic focus of caviar place of origin from a 'grown in' sense has changed to a focus to 'made in'.

Caviar De Neuvic is one such brand with their own story, as learned from owner Marc-Antoine Patacq (meeting, April 2015). Although some would argue that those that are new are having to be more creative with their brand story than those with links to the original wildcatch industry. Despite the majority of caviar is produced from aquaculture "the industry is still protected by the CITES (Convention on International Trade in Endangered Species) which aims to ensure that the international trade of caviar does not threaten wild species survival (Patacq, April 2015).

Marc-Antoine advised that all caviar producers must be registered with CITES and caviar producers must place a CITES code to their packaging to authenticate the content. This, Marc-Antoine proudly said, is like a badge of honour (Patacq, April 2015). Meaning their relatively young brand (Caviar De Neuvic was only two-years old and was buying in sturgeon roe from other producers while they waited the eight years required for their own Sturgeon to mature and produce roe) was still able to market themselves along other heritage regarded caviar brands like Sterling Caviar which is one of the original Caviar brands.

The other benefit for producers provided by CITES is a global quality accreditation.

Here's what a sample code - BAE/C/FI/2014/FI-02KTP/B680 - will tell you:

BAE - the type of caviar is in the tin (in this case Baerian Aspensi)

C - whether a caviar is cultivated (C) or wild (W)

FI - the country the caviar is from (in this case Finland)

2014 - the year of production

FI-02KTP - the unique code for the company licensed to pack/repack the tin

B680 - the unique code for the caviar itself (if you gave this to the company that packed the tin, they would be able to tell you which farm and batch it came from).

Figure 15: Deciphering the CITES code. (Source: Carelian Caviar 2016)

It still remains the onetime exclusivity of wildcatch, the regal audience of caviar consumers together with the production time that true caviar takes (Sturgeon fish do not mature until 7-8 years and are required to be killed in order for their roe sack to be harvested for caviar) continue to elevate it above all other types of seafood (Fletcher, 2010).

Salmon Caviar in Australia

Huon Aquaculture is one of two producers of salmon caviar in Australia and the only large producer based in Tasmania, Australia's island state. Salmon Caviar is a niche part of Huon Aquaculture's core business, Atlantic Salmon aquaculture production, of which they produce approximately 18,000 tonnes of Atlantic Salmon, *Salmo Salar* or Tasmanian salmon, as it is more commonly referred to on menus and in stores across Australia and parts of Asia.

Huon Aquaculture is the second largest salmon producer in Australia. It's entry into salmon caviar production was initially an accident due to fish at sea maturing early and producing unfertilised eggs. This roe was sold to existing customers for a low price, unbranded apart from the name of the producer and place of origin and all sold immediately.

In following years, the company chose to deliberately allow some fish to produce eggs for salmon caviar production and these sold well. Over a ten-year period Huon Aquaculture has gradually increased both production and the price and has also expanded its range to offer the market freshwater salmon caviar as well as marine or ocean bred salmon caviar.

With the harvested Huon Tasmanian salmon caviar selling out well before the salmon brood stock are ready for next years' harvest, despite rising prices, a business case was proposed to senior management by the author to dedicate more brood stock for salmon caviar purposes. The biggest risk to business foreseen was the cost in dedicating more resources (staff and infrastructure) to a (new) product category with unknown future market potential.

To date, the product range has experienced fairly organic growth with little dedicated marketing other than business-to-business communication at harvest time as well as updating the packaging to increase the visual prominence of the production place of origin, Tasmania. When assessing the distinctive brand assets, this was seen as a key product differentiator to the other Australian grown salmon caviar product and also because of the rising popularity in Tasmanian goods and services by consumers in Australia.

Salmon caviar is also targeted at a relatively niche area of the seafood market – the premium seafood end. Seeking existing salmon caviar consumers, lovers of seafood, those that like the luxury category affiliation with its close neighbour black caviar, or those seeking something new that is not widely accessible and provides them with an aspirational experience.

The premium end of the seafood market in Australia is arguably more well known by the general public for high value items such as pearls, wild abalone and rock lobster.

Provenance marketing salmon caviar - testing the opportunity

Huon Aquaculture derives its company and product brand names (Huon Tasmanian Salmon) from both the island and the Huon River (in the Huon Valley) where the majority of salmon the company produces spend their lives as well as focusing on the environmental attributes such as water and marine landscape that all contribute to the overall quality of the end product. This focus on (place) provenance branding and overall marketing of its products is a strategic decision by the company. Recent growth in national and international awareness of their key provenance pillar, Tasmania, has provided new market opportunities in export regions such as Asia who, off the back of Tasmania's growing reputation for quality produce and beverages, are seeking Tasmanian speciality products to offer their customers.

However, while the Tasmanian association may be enough to gain entry and get on shelf, the challenge then lies in creating a unique value proposition to avoid comparison to its more exclusive and expensive counterpart black caviar. Utilising the provenance elements explored

across America and Europe, the author proposes Huon Salmon Caviar consider the following assets in Figure 16 to build into their brand story:

| | |
|--|---|
| HUON SALMON CAVIAR Provenance value | OPPORTUNITY <ul style="list-style-type: none"> ▪ Consumer - ‘what’s in it for me’ ▪ Producer – What I want to be known for. |
| Spatial (Place) | Tasmanian Leveraging from the island’s reputation for producing high quality products. <u>All</u> Tasmanian products are good. |
| Cultural (Heritage) | In operation for 30 years - trust. Huon have been farming salmon for 30 years so they know what they’re doing. |
| Social (Production methods) | Sustainably farmed = Quality. Organic methods are used to farm the Salmon Caviar resulting in happier, healthier salmon and the environment. |
| Social (Production) | Salmon are hand-milked for their eggs to take to caviar production Each salmon is harvested by hand which is better for the salmon’s welfare and the resulting quality of the salmon roe. |

Figure 16: Huon Salmon Caviar provenance elements and the opportunity (Source: McKibben, 2016)

With the growth in the overall awareness and subsequent popularity of the Tasmanian brand the potential for Huon Aquaculture to exploit this provenance brand asset as well as explore other provenance elements is worth exploring further. Especially if the success of other island nations such as the Kona coffee and Irish salmon industries are considered successful examples.

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Plain English Compendium Summary

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|----------------------------|---|
| Project Title: | BRAND OF ORIGIN Exploring the marketing power of provenance for Agrifood producers |
| Nuffield Australia Project | 1516 |
| Scholar: | Abby McKibben |
| Organisation: | 370 Argyle Street North Hobart Tasmania 7000 |
| Phone: | +61 427 668 016 |
| Email: | abbymckibben@gmail.com |
| Objectives | <ol style="list-style-type: none"> 1. Does provenance branding provide a platform for a price premium? 2. Explore countries or producers using and benefiting from provenance marketing and understand why and how. 3. Develop an understanding of potential challenges arising from provenance marketing. 4. To understand more about such provenance protection frameworks used around the world and; 5. To make practical recommendations or raise points for consideration for producers considering using provenance elements in their own food brand marketing. |
| Background | To explore potential opportunities for salmon caviar marketing utilising elements of provenance. |
| Research | Visiting trade shows, farmers, producers, processors, universities, attending conferences, online research and industry networking. Also applying some of the concepts discovered overseas such as overlaying provenance elements to attract a price premium. |
| Outcomes | The provenance framework studied with respect to spatial, social and cultural elements are assets worthy of research consideration by producers seeking to create their own brand and may offer an opportunity for all producers, not just speciality food producers, to achieve a price premium. However, producers must give consideration to the specific set of values by consumers in the market they wish to sell their produce to, as these will ultimately determine a product's brand strength. Use of provenance values can validate a price premium. Provenance elements can act to protect producers from threat of imitations and to drive customer loyalty. |
| Publications | 2016 Nuffield National Conference, Adelaide, SA (September 2016) |