



The impact of the current expansion of the European Union on international marketing strategies on Norwegian multinational farmed salmon producers

The impact of
the expansion
of the EU

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A case study

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Abstract

Purpose – The purpose of this paper is to discuss the impact of the recent European Union (EU) expansion on the international marketing strategies of Fjord Seafood, a Norwegian farmed salmon producer.

Design/methodology/approach – The Norwegian salmon industry provides an interesting case study because it reflects the complexities of a dynamic international environment. Not only must the industry grapple with the threats and opportunities brought on by the expansion, but also it must confront the potential repercussions of, an at times troubled relationship with EU authorities.

Findings – The findings as a consequence of the study are based on the changes in the market place, provide a theoretically driven analysis of said changes, and suggest viable marketing strategies to accommodate the dynamism and complexity of the newly enlarged EU. As for the future, convergence of the market may make increased standardisation possible. However, food is very much culture dependent, so it is uncertain to what extent standardisation can and will occur.

Originality/value – The paper makes a two-pronged contribution to the literature on international marketing. The paper commences with a discussion of the macro-environmental factors which now confront Fjord Seafood. Building on existing theories, the discussion moves on to consider which marketing strategy and marketing mix options would be viable in a newly enlarged EU. Finally, the paper concludes with an integrated synopsis and several reasoned suggestions for future market growth.

Keywords International marketing, Marketing mix, European Union, Fish farming, Norway

Paper type Case study



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Introduction

The majority of fish consumed in Europe is supplied by Norway (European Marketing Data and Statistics, 2005a). It is therefore not surprising that the European Union (EU) represents the single biggest market for Norwegian fish producers (Asche and Guttormsen, 2001; Peterson and Nielsen, 2004). Statistics from 2003 show, 56 per cent out of a total export of 12 billion NOK (Norwegian Seafood Export Council, 2003) worth Norwegian salmon went to the EU. Thus, environmental changes, in this instance, the 2004 enlargement of the EU, are likely to have a discernible impact on Norwegian salmon producers and on their international marketing strategies. It is envisaged that the entire chain of production, from Norwegian salmon producers to transport companies specialising in the transportation of fresh fish will be affected (Abbros, 2000). Even Norwegian Governmental policies and negotiations may be affected.

Despite not being a part of the EU, Norway has enjoyed the benefits of a very low tariff on export of salmon and other fish products, through EEA agreement Protocol 9 (OECD Report, 2004). The inclusion of ten new countries into the EU, i.e. Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia, Malta and Cyprus, represents a further opportunity to gain new markets and to set up new production facilities. However, new competitors and new regulations must be confronted and conquered.

It is worth noting that the Norwegian salmon industry and its past relation with the EU has been a troubled one (Staniford, 2002) with accusations of dumping, causing minimum prices and quotas imposed in periods 1997-2002 and 2005-2009 (Archer, 2005). The imposition of these measures has been played out in the news headlines, making this industry very interesting to examine at this point in time.

To avoid an overambitious scope and to provide a more in-depth analysis, we examine one firm and the impact that the expansion has for its retail market strategy in Europe.

Fjord Seafood will be the firm for our discussion. A Norwegian-based multinational, it is one of the three largest farmed salmon producers in the world (Fjord Seafood, 2004a, b). This paper is based on the presumption that the salmon products from Fjord Seafood are a product, rather than a commodity, because the production is consistent, the products are branded with attributes such as quality (Fjord Seafood, 2005a) and can be differentiated from its competitors (Onkvist and Shaw, 1989) (for fresh salmon: whole, loins and fillets, brand might not be directly displayed to end-users). We examine how the enlargement might affect their European division's international marketing strategies by investigating the changing environment, and the impact this has on the different aspects of the marketing mix.

Background

Fishing has traditionally been very important for the Norwegian population, due to the country's long coastline and abundance of fish (Schjolden, 2004). Even with the oil industry taking over as a main source of national income today, the seafood industry still is the nation's third biggest export industry after oil/gas and minerals (Norwegian Seafood Export Council, 2003).

While the fishing industry has a long tradition in Norway, aquaculture or fish farming is relatively young, with only 40-years history (Fiskeri- og Havbruksnæringens

Landsforening (Norwegian Seafood Federation), 2003, 2004). A small population and high wages have propelled multinational companies and family-owned farms alike to become technology and knowledge driven (Ims and Jakobsen, 2006). The culture of constant innovation adopted by Norwegian firms has made them the chief exporters of aquaculture knowledge (Fagerheim, 2004).

Fjord Seafood, a producer of farmed salmon and other fish products, is one such firm. Company operations encompass farming, processing and sales in Norway, several countries in Western Europe, and in locales outside of the European region (Fjord Seafood, 2005b). Given the focus of the paper, the discussion will be limited to retail operations within Europe. The company's retail market includes supermarket chains, food producers and food service firms.

Up until 2004, Fjord Seafood had made no forays into the newly-included countries of Malta, Cyprus and Central/Eastern Europe (Fjord Seafood, 2004a, b). The key question therefore is: how the company should modify its international retail marketing strategies to capitalise on these new markets? The EEA agreement Protocol 9 which allowed Norwegian salmon to gain considerable market share in "old EU" countries will apply in the new markets (Archer, 2005). However, the benefit of the low tariff has been mitigated by allegations of dumping and an imposition of quotas and minimum prices between 1997 and 2002 (Asche and Khatun, 2006). More importantly, these restrictions will continue during 2005-2009 (Archer, 2005). Other obstacles come from recent research which indicates that farmed salmon has detrimental health effects (Hites *et al.*, 2004). An expanded EU also has implications in terms of country integration. Does a bigger EU imply that a more standardised approach can be used for international marketing mix within Europe?

The EU marketplace

In order to understand the impact, the expansion has on international marketing strategies of Fjord Seafood, there is a need to understand the expanded EU market on basis of political/legal, economic, societal and technological factors.

Legal and political factors

Legally, an expansion of EU means more markets will now have the same regulations (Paliwoda and Marinova, 2007). Relevant legislations include the lowering of the level allowed for cantaxanthin, the artificial colouring that is added to fish-food to produce red-coloured salmon (Holm, 2003) thus resulting in production changes. The change in colour can also affect product acceptance. Another regulation that has affected the price and quantity exported from production facilities outside the EU is the already discussed minimum prices and quotas (Kvist, 2004). The legal and political environment for Fjord Seafood is set to become even more complex given Norway's recent decision to report the EU to the WTO on account of alleged protectionism, and its threat to impose high taxes on goods imported from the EU (NTB, 2005).

Economic factors

In the last decade, three (Czech Republic, Poland and Slovenia) of the eight Eastern European countries have passed through tremendous reforms. At present, the remaining five countries are still in the throes of reformation. Despite a high level of

economic growth, all of these countries, with the exception of Slovenia, are still to reach the five figured GDP per capita (in US\$) which characterises the “old-EU” countries (2003 figures) (European Marketing Data and Statistics, 2005a). Malta, Cyprus and Slovenia are better off, having a GDP per capita which places them with Greece and Portugal, the lowest ranked of the traditional EU countries.

In recent years, there has been an influx of foreign direct investment (FDI) from firms which saw the benefit of locating in a place with lower costs and a close presence to Western Europe (Spillan *et al.*, 2004). However, there are now no guarantees that this cost structure will be maintained, as these countries have embarked on the fiscal reforms necessary to join the EU and the Euro. Statistics indicate that wages and consumer prices have grown steadily and at a greater rate than those of the “old-EU” countries since 1995 (European Marketing Data and Statistics, 2005a, b).

Cultural/societal factors

Culture plays a huge role in international marketing, and earlier studies on consumers of Western Europe showed three clusters that demand a different marketing mix (Kale, 1995). It is not likely that ten new countries can easily fit into these existing clusters, and alterations may be needed to allow for cultural and societal differences. One of the areas of greater variation across cultures is food preferences (Bowles, 1998). Whereas, approximately 55 per cent of food purchases in continental Europe occur in supermarkets and hypermarkets (Mintel, 2003), consumers in Eastern and Central Europe (except those from the Czech Republic) tend to spend more with specialist food stores or small food retailers (Mintel, 2003). Though the statistics on food expenditure may be distorted given that persons in the newly included countries spend a greater percentage of disposable income on food; Fjord Seafood must still examine how its traditional distribution strategies will cater to the new markets. Attention must will also have to paid to the issue of population density and to its impact on logistics (Berryman *et al.*, 1995) Malta differs considerably from the other countries with respect to density of population (European Marketing Data and Statistics, 2005c).

Given the variations in GDP, differences can also be seen in actual expenditure (as opposed to percentage expenditure). Eastern European consumers spend on average a lot less on food, drink and tobacco. In 2002, the Czech population spent an average of €911 per capita on food, while Greece, the one with lowest expenditure of the “old-EU” states, spent €1,867 per capita. Only a minor part of that expenditure was spent on fish. The kilogram per capita of fresh fish consumed in Poland, Czech Republic, Hungary is at the lower end of the EU (European Marketing Data and Statistics, 2005d).

Households are also larger in “new EU” countries. The average number of persons per household ranges from 2.35 in Estonia to 3.38 in Malta, as compared to a low of 2.12 for Germany and a high of 2.99 for Ireland (European Marketing Data and Statistics, 2005a). The variations in household size have implications for product size. Linked to this is also the fact that the traditional EU has a greater percentage of one person households which would demand portions and packaging suited to a single use or user (European Marketing Data and Statistics, 2005e).

Technological factors

The technological capability of the Easter European society and its newly privatised firms still lag behind those in the rest of Europe. This dissimilarity has fundamental implications for the marketing strategy of Fjord Seafood.

Firstly, colour television is not standard in Central and Eastern Europe. Therefore, the sensory appeal of colour television advertisements which can be utilized to induce the trial of new food brands will therefore not be an option for Fjord Seafood (Dibb *et al.*, 2006).

Secondly, the scarcity of freestanding freezers (European Marketing Data and Statistics, 2005f) in Eastern European retail shops, is an obstacle to the sale of frozen products, and will therefore alter the packaging aspect of the marketing mix.

Implications for the retail marketing mix of Fjord Seafood

We will now evaluate what the expanded EU means for Fjord Seafood's international marketing strategies. To do so, we will discuss some of the possible adjustments to factors comprising the marketing mix. Prior to the determination of marketing mix elements however, the company must decide whether to enter these new markets at all. This decision will be influenced by the socioeconomic differences already discussed, and the marketing, growth and profit objectives of Fjord Seafood. Nevertheless, an expanded EU means that the company's European marketing sales division should place greater emphasis on researching the new markets with a view to capitalising on the market potential contained therein. The focus of this division cannot therefore be "business as usual".

Product

If the decision is taken to enter the markets of the new member countries, the primary consideration would be which products Fjord Seafood should offer. Product type, quality and mix should flow out of the targeting and positioning strategies of the company. An obvious question would be whether consumer segments and market preferences are standard across the newly enlarged EU. Despite more than two decades of standardisation theories (arguably, since Levitt's argument that multinational corporations should standardize) (Levitt, 1983), national culture differences continue to moderate international and global branding efforts (de Mooij, 2003). Owing to economic differences between "old" and "new" member-countries, it is unlikely that products targeted to mass market in "old" EU can target the same market in "new" EU.

A segmentation strategy will also present its own concerns. Prior to the single market in 1992, Eurisko (Guido, 1991) spoke about three segments in which a pan-European marketing mix would work: teenagers, trendsetters/social climbers and business people. However, most of Fjord Seafood's (2005c) products are not likely to target these segments specifically. One solution would be for Fjord Seafood, when/if they enter that market, to target the urban, middle class segment in the "new" EU-countries, and make adaptations to better meet the needs of this segment and other viable ones as the brand is built (Walters, 1997). Another would be to develop new global products to suit cross-national segments across Europe, since some markets, if constrained by national boundaries, are too small markets for adapted products.

Irrespective of whether a mass marketing or segmentation strategy is used, some adaptation to product and packaging will still have to be made. Modifications could come in terms of package size (because of larger and less one person households) and in the range and type of products on offer. Some adjustment must be made, given the lack of freezers in retail shops. To increase marketability, it may be prudent to amend the labels to include descriptions in the target market's language, although there are no

regulations on this matter (Onkvisit and Shaw, 2004). With respect to ready meals in particular, provision will have to be made for differences in tastes across the individual countries. Nevertheless, some standardisation is possible; as a consequence of EU-wide standards for packaging (Onkvisit and Shaw, 2004) and for the farming of salmon (Holm, 2003). A further issue to discuss is where production occurs. However, we believe that this will have more impact on the price aspect of the marketing mix.

Price

Setting the right price will be difficult for Fjord Seafood. Marsch (2000) propose that the pricing decisions are typically influenced by factors at three levels: the internal level, macro- and competitive-level. On the macro-level, accusations of dumping caused minimum prices to be set. To mitigate this, Fjord Seafood can opt to create products (in Norway) with more value-adding attributes, making consumers willing to pay higher prices. However, it must be noted that though the populations of the “new” EU-countries are catching up with the rest of the EU, they are still on average less wealthy than the “old” EU population. Thus, it may be difficult to sell the products at a higher price without losing these customers (Teluk, 2003).

Another option would be to establish more subsidiaries within the EU (FDI) (Rugman and Hodgett, 2003), and if feasible, within the “new” EU countries, to explicitly cater for the European market. This approach would allow for the avoidance of some of the restrictive legislations and provide a greater freedom to set prices (Cavusgil, 1996). The aquaculture expertise of Norwegian farmers would stand them in good stead in attempts to establish subsidiaries. In addition, this strategy would work to free them from the dumping accusations and from the stigma attached to Norwegian salmon (country-of-origin effect). However, possible problems would stem from compatibility and control issues (Fjord Seafood, 2004a, b). Fjord Seafood would also have to ensure then that prices are not set so low that consumers perceive the products to be inferior.

There is also the option of focusing on markets outside of the EU, as Norwegian salmon is increasingly sought in South East Asia and Russia, where legislation is less obstructive to price setting. In fact, Russia is now the fastest growing market for Norwegian salmon (FINMR, 2003).

Competition and competitive pressures must be considered in every price setting exercise. Prior to the establishment of the single market in 1992, research had predicted that competition would intensify for practically all producers (Guido, 1991) and this is expected to further augment with the enlargement. Fjord Seafood will have to compete with existing local competitors as well as new competitors seeking to tap into the potential of the new markets. The required minimum prices will place Fjord Seafood at a price disadvantage against eventual local competitors. In addition, once prices have been set, there is still work to do with frequent adjustment of prices to fit the higher inflation within “new” EU-countries.

Differences in price competition and economy also heighten the dilemma of whether to have standardised prices, or to adapt to localised costs and demand. Standardisation would ensure a consistent image of the brand and its products across Europe and make it easier to manage. However, this could be detrimental if country differences in cost of living and product demand are profound.

Promotion

A well thought out promotion strategy provides a platform for competitiveness over and above price (Dibb *et al.*, 2006). Television advertisement is expected to be less effective as a promotion medium given that colour sets are not commonplace in the “new” EU. Promotion campaigns within the supermarkets/stores, direct selling to the stores and other methods should thus be preferred over television commercials. As for content of promotion, cultural differences do exist. Fletcher and Melewar (2001) using Hofstede and Trompenaars’ work on culture found that emerging markets like Czech Republic, Hungary and Poland (Trompenaars and Hampden, 1997) exhibit a greater degree of collectivism (Hofstede, 1991; Bakacsi *et al.*, 2002). Promotion campaign themes should therefore focus on societal or familial concerns rather than individualistic needs. Thus, an advertisement showing healthy fish dishes for the whole family might be more effective than one which considers how speedy fish dishes would be more convenient for managing hectic lifestyles. In view of indications that persons in developing or transitional economies are more particularistic and specific (Trompenaars and Hampden, 1997) it may be more efficacious to communicate that salmon from Fjord Seafood can be enjoyed when inviting friends over (specific setting) rather than just emphasizing that the brand is an enjoyable one.

Given that Eastern Europeans may be less knowledgeable about the health benefits of fish consumption, a greater percentage of the promotion budget (than in the past) may have to be dedicated to education programmes. This campaign could seek to boost demand for fish products and to create a generic image of Norwegian salmon being both cheap and of high quality.

As a larger proportion of food is sold outside the supermarket format, promotion should be targeted to individual stores owners as well as to the big supermarket chains. The scale and mean of such promotion may need to be changed to be made suitable for local conditions. Fjord Seafood should also consider the option of finding local partners with connections and market knowledge, as joint ventures (Melewar *et al.*, 2006) can be a means of overcoming the cultural differences and market research-related limitations of emerging markets.

Although the actual communication itself should be adapted to individual markets within EU, the firm can still standardise its process (Sorenson and Wiechmann, 1975) (uniform marketing practices) to create some coherence. Pattern (Peebles *et al.*, 1977) or the use of a standardised universal promotion theme; (i.e. kin-groups, universally valued) (Murdoch, 1945) can also be adopted to save costs.

Distribution

According to Rosenbloom *et al.* (1997), there are six decisions that need to be taken to achieve distribution objectives. Consensus must be reached on the role of distribution in the strategy and marketing mix, the design of channel, the selection criteria for channel members, and finally on the procedures for evaluating the performance of channel partners. Linked to the first two decisions will be where to establish production, processing and sale outfits. Obviously, establishing a sales operation close to the market in the “new” EU-countries will make it easier to contact and control the distribution channels, thus making it possible to have fewer intermediaries. However, this is a relatively costly alternative, and the pros and cons must therefore be weighed carefully. Distribution decisions will also be linked to where the production occurs.

Whether or not Fjord Seafood decides to establish new production facilities close to “new” member-countries, transportation from production to sales outlets and the design/choice of sales channels will remain the more vital decisions.

The shopping habits of the segment(s) to be targeted must also be considered in the channel design process (Onkvisit and Shaw, 2004). If the target market is urban middle-class as previously suggested, more up-market food-retailers in cities should be chosen as channels, versus the supermarket-chains in “old” EU-countries. However, having a different image in different countries can prove problematic as integration becomes more prominent.

Discussion and conclusion

We have analysed some possible effects from EU-extension on Fjord Seafood’s international (with focus on European) marketing strategies. Most of these effects involve the need to adapt to individual markets in all aspects of the marketing mix, which is compatible with earlier studies on Euro-brands (Whitelock *et al.*, 1995), although there are mentions of increasing standardisation as well as new competitors and FDI. The selected option will depend on fit to company strategy and to the external environment. However, Fjord Seafood must be fully aware that these will change over time.

As this is a case study of one firm at one point of time, many of the scenarios and circumstances that come to light in a longitudinal study have not been considered. The analysis itself is limited because the data are comprises mainly of statistics which are secondary in nature. Compatibility issues also exist since some data are from as early as 2003. Nevertheless, this paper is important because it considers the changes in the market place; it provides a theoretically driven analysis of said changes, and suggests viable marketing strategies to accommodate the dynamism and complexity of the newly enlarged EU.

As for the future, convergence of the market may make increased standardisation possible. However, food is very much culture dependent, so it is uncertain to what extent standardisation can and will occur. Another consideration is that of political environment. Will the quota and minimum prices for raw salmon be maintained? If so, the firm may need to consider other options such as a reduction in the production of salmon for sale in the EU market. Fjord Seafood can also focus on offering salmon products that are not affected by the new legislations. Linked to this is the trend of Norwegian firms focusing more on markets in the Far East and Russia. All these factors are likely to have tremendous impact on the firm’s international marketing strategies. Indeed, the implications of the extension cannot yet be fully determined, but it is an ongoing issue which will need to be redefined and reassessed.

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