FOR INDUSTRY USE ONLY



TRADE TOOLKIT

FOR THE SCOTTISH SEAFOOD INDUSTRY



Seafood from Scotland This toolkit is for industry use only. It is not for use with buyers or consumers. For a list of all marketing materials that can be used with consumers, see page 10.

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SCOTLAND - A LAND OF FOOD AND DRINK BRAND MODEL

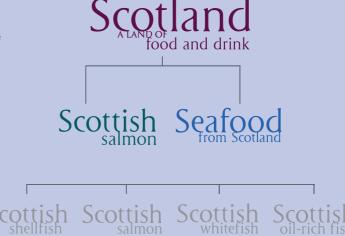
How our brand works

Scotland - A Land of Food and Drink is the overarching brand for the food and drink sector. All communications follow on from this brand, with recognisable logos, design and language (how we talk about them in print, digital, social media and face to face communications).

Our vision and brand values

Scotland is a country with outstanding and unique food and drink. This is underpinned by the three main brand values:

- **Our people** Scotland's forward thinking food and drink producers innovate and adapt to modern market demands, while staying true to deep-rooted traditions which have been handed down through generations.
- Our place There is a natural harmony between Scotland's land and seascapes. With regions carrying their own unique personalities and diversities to create produce with real taste and character.
- **Our product** We take great care and pride in everything we produce; passionate to deliver fantastic tastes and flavours for food and drink lovers throughout the world.

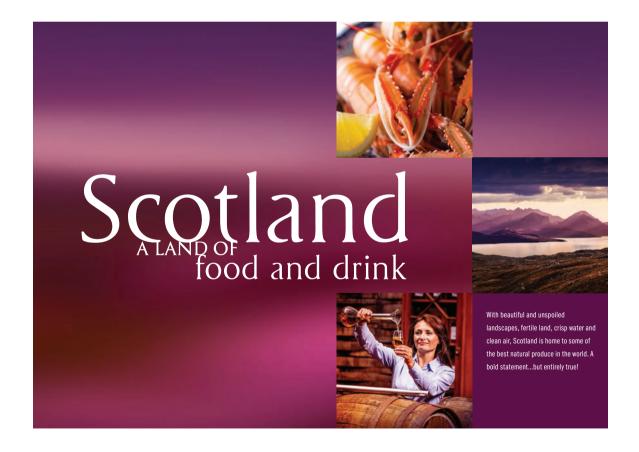


SCOTLAND - A LAND OF FOOD AND DRINK

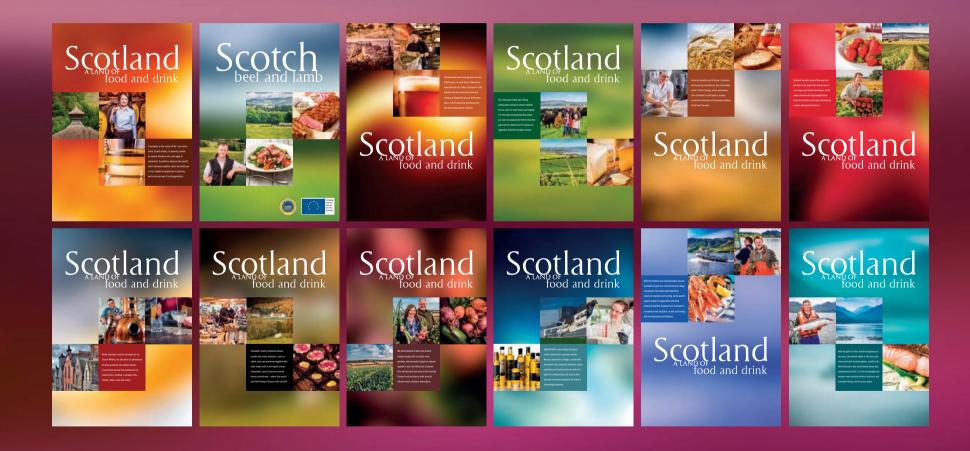
Scotland – A Land of Food and Drink is the main branding for all food and drink sectors in Scotland. Seafood from Scotland is a sub-brand of this and has been created to reflect the brand values of people, place and product that are specific to the seafood sector.

These three elements, help to build the seafood story and are set against a green/blue tinted background to evoke associations with Scotland's seawaters and lochs. Other food and drink sectors have a backdrop that is relevant to them e.g. the soft fruits sector is red which can be associated with berries/fruit.

This brand trademark must be used in conjunction with the cohesive story and background of people, place and product.



There are currently 12 other category sectors which are shown below, with an individual colour associated with each, and their own people, place and product photography. These sectors are **Whisky, Meat, Brewing, Dairy, Baking, Soft Fruits, Premium Spirits, Premium Retail, Produce, Innovation, Seafood** and **Salmon**. When working together this creates a very strong and very distinctive brand.



SEAFOOD FROM SCOTLAND – BRAND MODEL

OUR NAME	Seafood from Scotland						
OUR POSITIONING	A country with outstanding seafood						
OUR BRAND VALUES	OUR PEOPLE		OUR PLACE			OUR PRODUCT	
WHAT THIS MEANS	Scotland's forward thinking fishermen, farmers and producers innovate and adapt to modern day market demands, while staying true to deep routed traditions which have been handed down through the generations.		Scotland's natural lochs and seas create seafood that is uniquely Scottish and world renowned for its quality.		We take great care and pride in everything we catch and produce – we are passionate about delivering fantastic tastes and flavours for seafood lovers throughout the world.		
BRAND TONE OF VOICE	INSPIRING	١	/ELCOMING EMOTIONAL			CONFIDENT	
BRAND PROPOSITION	'HOME TO SOME OF THE WORLD'S FINEST SEAFOOD'						
STYLE OF COMMUNICATIONS	WE HAVE A STORY TO TELL		OPEN FOR BUSINESS			PERSONAL	
COMMUNICATIONS TEST	IS IT SIMPLY UNDERSTOOD?		IS IT TRUE TO THE BRAND VALUES?			IS IT IMPACTFUL?	
CUSTOMER BENEFIT	REASSURANCE		ALIGNED WITH EVER EVOLVING CONSUMER DEMANDS		FANT	ASTIC TASTES AND FLAVOURS	

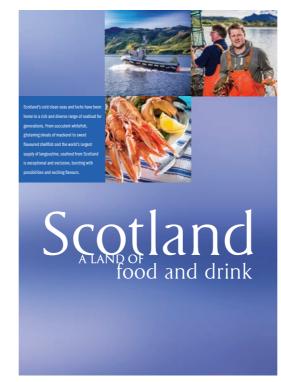
The Seafood from Scotland story

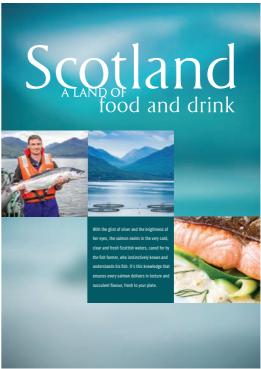
This story underpins all the communications for Seafood from Scotland and ensures that the messaging about our seafood's quality, heritage and provenance is cohesive and collaborative.

How Seafood from Scotland is branded

From the Scotland Land of Food and Drink branding, the subsectors of Seafood from Scotland and Scotlish Salmon are branded in their own colour with imagery that fits in with their sector.

These are the examples of the two brands which show the generic Seafood from Scotland and Scotlish Salmon branding.





KEY STRENGTHS AND BENEFITS

The table below outlines what is exceptional about seafood and how to promote it's benefits.

Key strengths	Benefit to the customer	Benefit to the consumer	
Scotland fishes and farms over 60 different seafood species.	With a diverse rage of high quality seafood, Scotland's seafood larder is plentiful and diverse with some of the best in the world, from whitefish to pelagic, shellfish and salmon.	Exciting variety to please customers.	
Proud to produce quality seafood, over quantity.	Confident in the quality and consistency of product bought. Can highlight product in marketing.	Safe in the knowledge you are offering a premium choice. Great experience eating Scottish seafood.	
Our people hold years of knowledge and experience through our strong heritage and traditions.	Products with real taste and character.	Exciting and interesting experience for customers.	
One of the most tightly regulated fishing and processing industries in Europe.	Fully traceable and safe seafood.	Confidence and assurance in product. Guilt free choice.	
Scotland is an acknowledged leader within Europe in sustainable fisheries and fish farming management.	Sustainable purchasing in line with procurement policies.		
Scottish seafood is healthy and nutritious.	Scottish seafood is good for you, healthy and nutritious.	Feel good choosing a healthy nutritious option.	
Scotland is a land of food and drink	The assurance that there is a range of high quality natural produce available from Scotland's larder.	They can be safe in the knowledge that seafood is one of many high quality Scottish products available.	

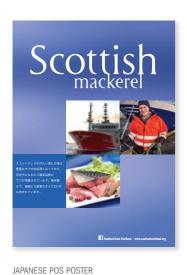


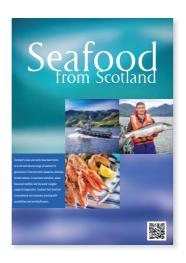
The brand Seafood from Scotland has been created to ensure that communication is clear, easily understood and compliments the Scotland - A Land of Food and Drink branding. Marketing material available includes:

- · Overview Bochure
- · Sustainability Guide
- · Seasonality Guide
- YouTube Channels (in various languages)
- POS items
- Exhibition Stands

For more details about any of the above, please contact Seafood Scotland (contact details on back page).

Examples of current marketing materials





POS POSTER





OVERVIEW BROCHURE



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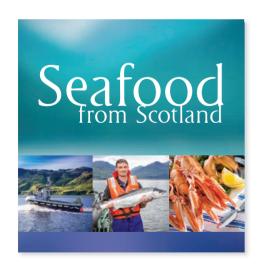
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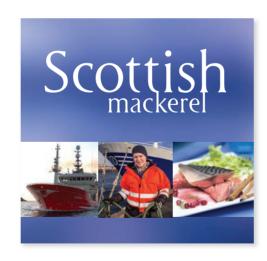
SUSTAINABILITY GUIDE



POINT OF SALE SHELF TALKER FOR USE IN RETAIL



POINT OF SALE SHELF WOBBLER FOR USE IN RETAIL



POINT OF SALE MACKEREL SHELF WOBBLER FOR USE IN RETAIL





EXHIBITION STAND

The Seafood from Scotland brand can be used in all seafood subsectors as shown in the next few pages. The branding follows the same principles of people, product and place.



Seafood from Scotland







Brown Crab (Cancer pagurus)

Traditionally fished by pot and creel, particularly around the west coast and the Scottish isles. Brown crab can be bought live, cooked, dressed or as ready-made products such as crab cakes or terrines. The rich white meat found in the claws is very sweet and the brown meat is particularly rich in omega 3 and other beneficial vitamins and minerals. Male crabs range from 1kg to 2kg with an estimated yield of 35%. Look out for the MSC logo on brown crab from the Shetland Isles.























Langoustine (Nephrops norvegicus)

Caught in the North Sea and inshore Scottish waters, Scotland has the world's largest share of langoustines. Highly prized and sought after, they are versatile and cook in minutes. Similar to a king prawn, but actually a closer relation of the lobster, they grow up to a maximum of 250g, have a meaty tail, soft prawn-like texture and a very sweet shellfish flavour.



















Mussel (Mytilus edulis)

Lobster (Homarus gammarus)

Traditionally fished by pot and creel around Scotland's coastline. With a strong sweet flavour and meaty texture, Scottish lobster are some of the finest in the world. Sizes range between 23cm and 38cm, weighing between 0.7kg and 2.2kg.











































Rope grown on the west coast of Scotland and around the

Scottish isles, mussels are a highly sustainable species and

are quick and easy to cook. Scottish mussels have a meaty

flesh and sweet medium seafood flavour. Look out for the











King Scallop (Pecten maximus)

Caught around Scotland's coast, using mobile gear or by hand diving. Scallop meat has a sweet delicate flavour and needs minimal cooking. Scottish King scallops have approximately 15cm wide shells, with 18-35 pieces of meat per kg (out of shell). Queen scallops have approximately 7cm wide shells and 40 to 120 pieces of meat per kg. Look out for the MSC logo on scallops from the Shetland Isles.







































Pacific Oyster (Crassostrea gigas)

Cultivated on the west coast and isles, Scottish oysters are a much sought after product. Pacific oysters, the main species grown in Scotland, take 18-30 months to develop to market size of 70-100g live weight, normally with a shell length greater than 75mm.





























Salmon

Farmed in the cool, clear waters of the Highlands and Islands, sustainably farmed Scottish salmon was named 'best farmed salmon in the world' in a poll of international seafood buyers. Scottish farmed salmon has held the French Government's top quality award, Label Rouge, for 20 years. It was the first non-French food to receive this accolade. The Atlantic salmon offer from Scotland includes fresh, frozen and smoked products. Delicately flavoured flakes of Scottish salmon can be used for carpaccio, sushi, sashimi or cooked in a variety of ways.



















Cod (Gadus morhua)

Caught in the North Sea, a sweet flavoured fish with large succulent white flakes lending itself to a great variety of filleting options and cooking methods. Cod range from 500g to 6kg, the larger 4-6kg size providing several fillet portions from each side of the fish.





Haddock (Melanogrammus aeglefinus)

Scotland's favourite whitefish, caught in the North Sea and off the west coast of Scotland. A sweet flavoured fish with medium to large flakes, versatile for many cooking methods. Whole haddock are available up to 3.5kg, but most commonly as 2 whole side fillets up to 400g. Look out for the MSC logo on Scottish North Sea haddock products.





Hake (Merluccius merluccius)

An excellent fish, very popular in Europe, fished in the North Sea and west of Scotland, hake has a soft flesh which firms up when cooked. Ranging from 1 to 5kg, hake has a long, round slender body, great for cutting into steaks or loins.





Witch Sole (Glyptocephalus cynoglossus)

Sometimes known as Torbay sole, this lesser known flatfish species is generally between 225g and 900g whole weight and fished from the North Sea. Great cooked whole for the best flavour.





Whiting (Merlangius merlangus)

A smaller fish from the cod family with a silver-grey body and round belly, this species is often sold around 2kg. Similar to many of the whitefish species, it takes very little cooking. Mainly caught in the northern North Sea.





Monkfish (Lophius piscatorius / L. budegassa)

Scotland's premium fish, with a firm meaty textured flesh and sweet shellfish flavour. Caught on the continental shelf to the north and west of Scotland, generally the tail is the most popular cut, ranging from 350g to 4kg. The cheeks and livers are also sold, regarded as a premium delicacy across Europe and countries such as Japan.





Saithe (Coley) (Pollachius virens)

A good alternative to cod and haddock. It is a fine flavoured species abundant in all waters around Scotland. Similar to cod, the species ranges from 500g to 6kg as whole fish.





Megrim (Lepidorhombus whiffiagonis)

Caught on the continental shelf to the north and west of Scotland. Whole fish range from 225g to 900g and for the best flavour should be cooked whole.





Plaice (Plueron ectes platessa)

A versatile meaty flatfish with a sweet, mild flavour, this species is fished from the North Sea. Ranging from 230g to 2kg and most commonly available between 500g to 750g, these whole fish are easy to identify with their distinctive orange spots.

Best cooked whole for a great flavour.

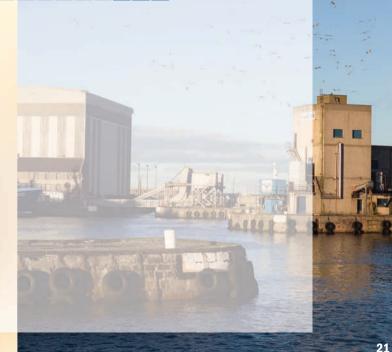




Lemon Sole (Microstomus kitt)

A high quality, prime fish with a delicate sweet flavour, fished from the North Sea. Whole fish start from 230g to 1kg, most common between 500g and 750g and are best cooked whole.











For further information or to give feedback on this guide, contact:

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f Seafood from Scotland







Key strengths	The stats – proof that we're doing well			
	• Scotland lies where the warm waters of the Gulf Stream meet the cold water of the North Atlantic providing nutrient rich feeding grounds, making it possible for a huge variety of species to grow.			
	· More than 60 species are fished and farmed in Scotland, with a landed value of over £1 billion per year.			
Scotland fishes and farms over 60 different seafood species	· Seafood is a diverse product and includes whitefish, oil-rich fish (mackerel and herring), wild and farmed shellfish (including mussels, oysters and scallops), and farmed fish (such as salmon, trout and halibut).			
	· Scotland catches and processes the world's largest share of langoustine.			
	· Scotland is the third largest salmon producer in the world.			
	 Scottish seafood is fished from the pristine, cold waters around Scotland's 12,000km coastline and farmed in the high tidal sea lochs of the highlands and islands. 			
	Shellfish			
	· In 2014, all of Scotland's shellfish waters complied with the minimum environmental quality standards.			
	 Scotland's cold clean nutrient rich waters allow shellfish such as lobster and langoustine to mature in their own time, developing in size and flavour complexity. 			
	• The Food Standards Agency classification results for 2013/2014 show that around 58% of identified 'shellfish harvesting waters' are currently Class A all year round. This is the highest quality standard; only shellfish harvested from Class A waters are permitted to go straight onto the market without the requirement for further cleaning or 'depuration'. A further 34% of harvesting waters are Class A for part of the year and Class B for the remainder.			
Proud to produce quality seafood, over quantity	Whitefish			
	In 2014, whitefish landings constituted 18% by weight, but 28% by value (£143m/£514m) of the total Scottish catch.			
	The three most valuable whitefish species were:			
	 Haddock £42.1m Monkfish £24.9m Cod £22.1m 			
	· Haddock, monkfish and cod, in value terms, account for 62% of Scottish whitefish landings (and 56% by weight). Quota increases for 2016 mean they will continue to appreciate in importance.			
	• Overall Scottish vessels land 67% by weight and 60% by value of all whitefish caught and landed by UK registered vessels into the UK.			

Key strengths	The stats – proof that we're doing well		
	Scottish Salmon		
	 The strong currents ensure that the fish are constantly swimming, which produces firm, textured flesh and exceptional flavour. 		
	 In 1992, Scottish salmon was the first foreign product to gain the prestigious 'Label Rouge' quality mark granted by the French Ministry for Agriculture. 		
	· In 2014, Scottish salmon was named 'Best farmed salmon in the world' by international seafood buyers.		
	Pelagic Industry		
	· Industry investment in state-of-the-art vessels ensure catching methods are efficient, producing the highest standard fish.		
	• Scottish fishermen target the species when they are in dense shoals. Consequently tow times are very short and the fish is of better quality because it's brought on board quickly.		
Proud to produce quality seafood, over quantity	 The refrigerated seawater storage tanks utilise the very latest refrigeration technology, ensuring rapid chilling of fish within minutes of being taken on board. The fish is then maintained at a chilled temperature near 0°C, leading to the premium quality of catch from sea to shore. 		
	 When product arrives on shore, clean, efficient transfers and closed route systems are employed to control temperature and product quality. 		
	 Pelagic processing undertaken for this sector is technically advanced and fully automated, from point of receipt to blast freezing, in dedicated, state of the art factories. 		
	Proof of Demand: The world's top chefs choose the quality of Scottish seafood		
	· Scottish seafood was used in the prestigious Bocuse d'Or culinary competition in Lyon, France in 2011.		
	· Partner to the World Chefs 2012- 2016 Seafood Scotland was used by over 100 chefs in global culinary competitions.		
	· Official seafood partner to the World Gourmet Summit 2014, 2015 and 2016.		
	· In demand around the globe, Scottish seafood is exported to over 100 countries around the world.		
Our industry has years of experience and extensive knowledge built from the strong heritage and traditions of fishing in Scotland	Scotland holds two European Protected Geographical Indicator status (PGI) Awards. Arbroath Smokie, in recognition of the unique production method and finished product, and Scottish salmon in recognition of the unique marine environment they are grown in		

Key strengths	The stats – proof that we're doing well		
	The Scottish seafood industry uses a variety of third party accreditation schemes and these are used across the industry to ensure safe and traceable products. These include:		
	On Boats		
	• The Responsible Fishing Scheme (RFS), developed by the UK Sea Fish Industry Authority, to raise standards in the catching sector, enabling those within the seafood supply chain to demonstrate their commitment to the responsible sourcing of seafood.		
	At Farms		
One of the most highly regulated fishing and processing industries in Europe	 All members of the Scottish Salmon Producers' Organisation participate in the independently audited Code of Good Practice which covers in the excess of 500 compliance points. 		
	In Factories		
	 Safe & Local Supplier Assurance (SALSA): A food-safety standard that reflects both the legal requirements of producers and the enhanced expectations of 'best practice' by professional food buyers. 		
	· British Retail Consortium Global Accreditation (BRC): BRC is a globally recognised standard which ensures that best practice is established and maintained in a food manufacturing environment.		
	· International Food Standard (IFS): provides a common standard with a uniform evaluation system to provide a transparent and common supply chain standard across Europe.		
	 Scottish seafood is increasing in popularity. After whisky, seafood is Scotland's second largest export, sold to over 100 countries around the globe. 		
	· Over 60 species are landed in Scotland including shellfish, whitefish and oil-rich fish.		
	• Scotland is one of the largest seafood producers in Europe, with more than 2,000 boats and 5,000 fishermen catching fish around Scotland's coastline.		
	\cdot Over £1 billion and 540,000 tonnes of seafood is landed a year.		
Scotland is A Land of Food and Drink	£600m worth of salmon and seafood exported annually.		
	• The Scottish fishing industry leads the way in sustainable fishing management in Europe. Many of our producers are accredited by the Marine Stewardship Council.		
	· Scotland has one of the most modern fishing fleets in Europe, manned by an experienced workforce.		
	· Scotland is the third largest salmon producer in the world.		

Key strengths	The stats – proof that we're doing well	
	 Modern Management and Regulation: Industry and government work together to provide a highly controlled industry, covering vessel licenses, catch limits, effort at sea and minimum landings. This highly regulated approach ensures Scotland adheres to European legislation and operates a sustainable industry. 	
	• Marine Stewardship Council accreditations (MSC): Scotland holds more MSC accreditations than any other European country and all sectors of the industry hold at least one accreditation. MSC has been successfully achieved for West Coast herring, North Sea herring, Atlanto-Scandian herring, North Sea haddock, Shetland and Mainland mussels, North Sea and West of Scotland saithe, North-East Atlantic mackerel, Shetland scallops and Shetland brown and velvet crab fisheries. North Sea cod has shown steady improvement since 2006. The stock is now at the highest level for more than 30 years, and has recently commenced assessment for MSC certification.	
	• Fishing for Litter: Launched in Scotland in 2005, this is an active environmental response to the progressive increase of marine litter in the seas around Great Britain, Scandinavia and Western Europe. Over 170 boats and 17 harbours participate in the Scotlish initiative. By 2012, Scotlish fishing vessels had voluntarily cleared over 500 tonnes of marine litter from Scotland's seas and landed it in participating ports; the equivalent of bringing 425 cars ashore.	
Scotland is an acknowledged leader within Europe in sustainable fisheries and farming management	• Scottish Conservation Credits Scheme: The pioneering Scottish Conservation Credits Scheme has worked well to improve cod recovery in the North Sea and to reduce discards of other demersal species. It continues to improve fisheries management and help the recovery of cod stocks. The scheme works by closing areas of the sea to fishing when high concentrations of cod are found. Closed areas were recently extended to include high concentration of other juvenile species of fish.	
	· In 2015 cod stocks had improved and North Sea cod was moved from the Marine Conservation Society's 'Fish to Avoid' list to their 'Fish to Eat' list.	
	• Research and Innovation: Research and investment in gear technology has been used to improve fishing methods to avoid the capture of untargeted and undersized species which has greatly reduced the occurrence of fish discarding by Scottish fishermen.	
	• Catch Quota Management Scheme (CQMS): Scotland was one of the leading nations in the Catch Quota Management Scheme (CQMS), a pilot scheme using cameras fitted on a number of boats, to monitor and verify catches and provide the authorities and scientists with accurate total catch data. This is used to understand and manage the fishery better. Observer programmes are also in operation across all sectors of the industry.	
	• Code of Good Practice for Finfish Aquaculture: All members of the Scottish Salmon Producers' Organisation participate in the independently audited Code of Good Practice which covers in excess of 500 compliance points.	
	• RSPCA Assured: Scottish salmon farmers are proud to have the largest industry participation in the RSPCA Assured scheme of all animal protein producers in the UK. The RSPCA Assured higher welfare standards cover feeding, stocking density, water quality and environmental management.	
	· Scottish seafood is good for general health and has been linked to specific benefits for the eyes, heart and skin.	
There are health benefits for consumers associated with Scottish seafood	Seafood contains important vitamins and minerals including vitamins D and B12, selenium and zinc. Oil-rich fish such as salmon, trout, herring and mackerel, and shellfish such as crab and mussels are the best natural sources of Omega 3. Omega 3 is important for brain development in young children and helps to lower blood cholesterol and boost memory and concentration.	