



# Maine Seafood Marketing Industry Survey

Principal: Nick Branchina, CEI  
Consultant : Janine Bisallon-Cary, Monterssant Group | Conducted: Spring 2020



Coastal Enterprises



## ABOUT MSMI



The **Maine Seafood Marketing Initiative (MSMI)** aims to **stimulate market development** by creating a promotional entity which **introduces domestic buyers to our products** while **expanding awareness and demand within unexplored national markets** for wild-catch and farm-raised Maine seafood.

Funded by **Maine Technology Institute** and **CEI**, the MSMI Pilot Project is comprised of four focused deliverables:

1. **Market Survey**
2. **Best Market Prospects Overview**
3. **Market Development Plan**
4. **Business Model for Early Stage Execution**

*"The MSMI will benefit the entire Maine seafood industry and support the real need for trade marketing in the U.S."*

*-Annie Tselikis  
Executive Director  
Maine Lobster Dealers Assoc.*



# ABOUT THE SURVEY

## Purpose:

Research Maine's seafood assets and classify those companies with products that are sustainable and have opportunity to grow nationally. Target those seafood/aquaculture companies showing interest in regional/national market development activities. Execute a Market Survey with these businesses to identify their market interests and gaps.

## Survey released February 21, 2020 - Closed March 15, 2020 (PRE-COVID Closures)

- **Target Audience:** Maine's Established Seafood Harvesters, Farms, Distributors, Processors, Smokehouses - including contacts at prospective land-based aquaculture operations.
- **10 Questions/Multiple Choice Only/Anonymous Response**
- **66 Individuals from 54 Businesses operating in Maine were approached**
  - 41% of responders were **"Primary Processor/Value-Add Processors"**
  - 27% of responders were **"Fishermen/Harvesters"**
- **22 Total Responses - 33% Response Rate**



## KEY FINDINGS



### Sales and Markets

#### ➤ Bestselling Species/Products

1. **Maine Lobster**
2. Groundfish/Finfish (*includes Atlantic Salmon*)
3. Mussels
4. Scallops
5. Oysters

#### ➤ Customer Markets

77% of Respondents indicated **over 50% of their sales come from out of state**

#### ➤ Top Sales Channels

1. **Direct to Wholesalers/Distributors**
2. Direct to National Foodservice Distributors

#### ➤ Top Regions Perceived to Have the Greatest Market Potential (outside of New England):

1. **Pacific/Mountain**
2. **Mid-Atlantic**
3. South Atlantic



## KEY FINDINGS



### Exhibiting and Trade Shows

- **When asked where businesses exhibit:**
  - There was a **36% tied response** for the three following answers
    1. Seafood Expo North America (SENA – Boston)
    2. At “Other” national and international trade shows
    3. “Not Interested” in exhibiting at all
- **When asked if they would have interest in exhibiting at national tradeshow:**
  - **45%** would share a booth with other Maine Seafood Companies
  - **32%** would be part of a “Maine Pavilion” with their own booth

### Gaps/Barriers

- **Businesses identified the top barriers to expand marketshare:**
  - 1. Not enough salesforce/dedicated salespeople**
  2. Need to do more marketing to expand interest outside Maine
  3. Product supply cannot keep up with existing demand





## KEY FINDINGS



### Gauging Interest in Industry

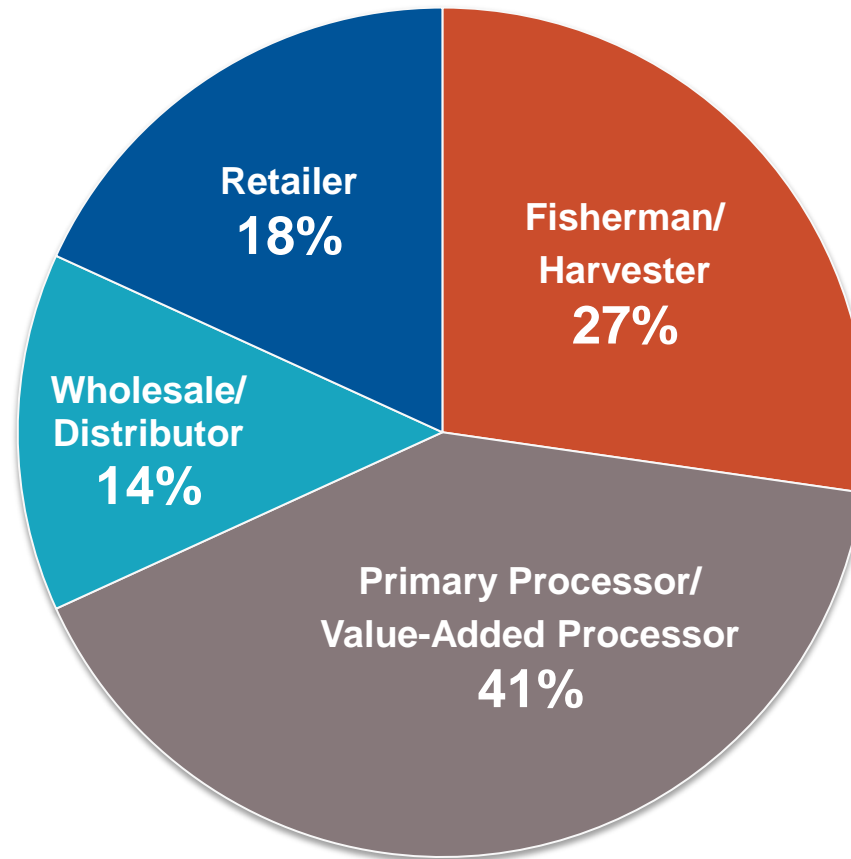
When asked if they would support and participate in an established **Maine Seafood Marketing Entity** promoting **ALL** of Maine's seafood products:

**64%** responded “**Yes** – if dues and costs were reasonable”

**0%** responded “**No!** This is a bad idea”

## Q1: Which BEST describes your Operation?

Answered: 22  
Skipped: 0



- Fisherman/Harvester
- Primary Processor/Value-Added Processor
- Wholesale/Distributor
- Retailer



## Q1: Which BEST describes your Operation?

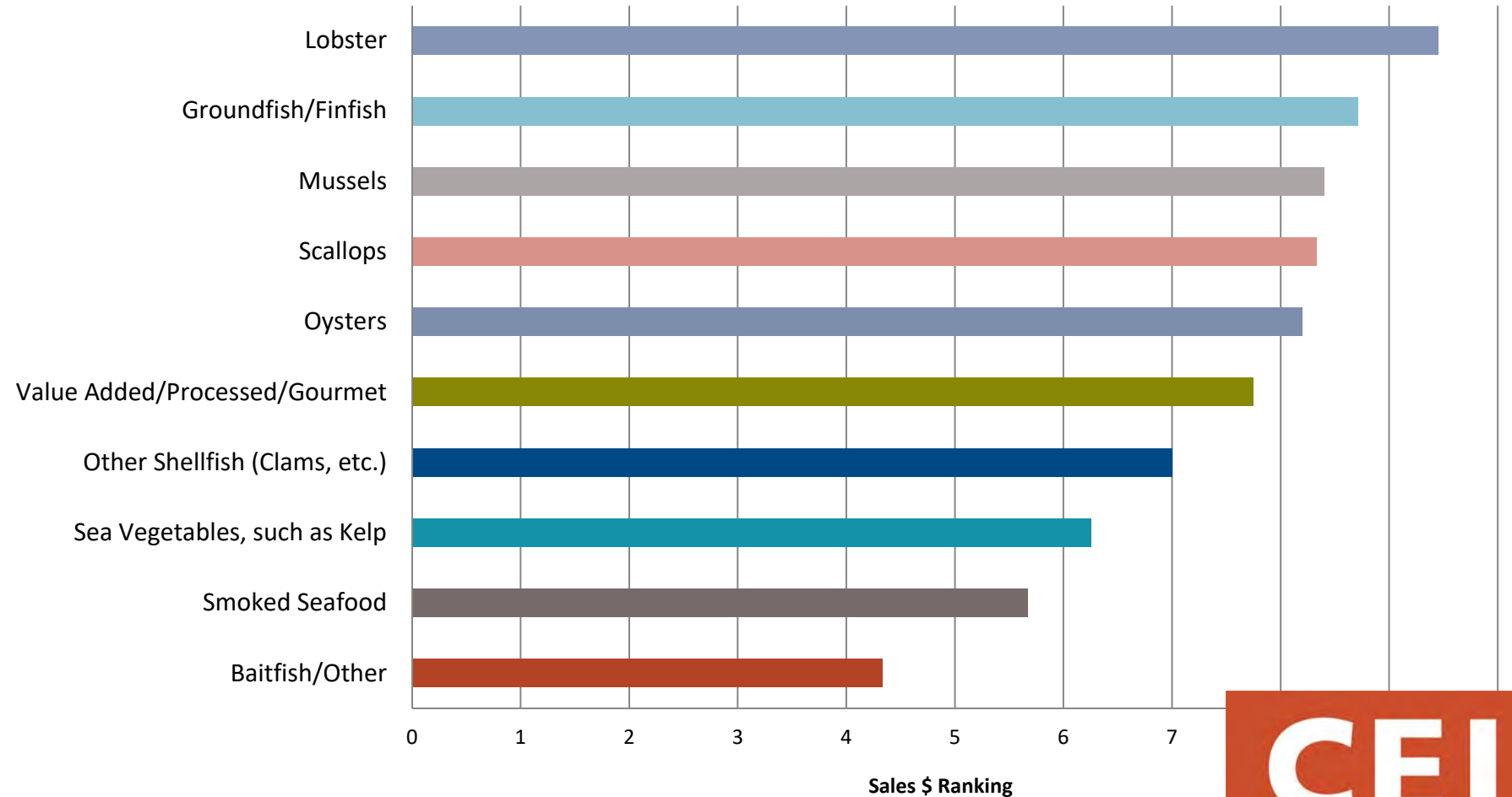
Answered: 22  
Skipped: 0

ANSWER CHOICES	RESPONSES	
Fisherman/Harvester	27%	6
Primary Processor/Value-Added Processor	41%	9
Wholesale/Distributor	14%	3
Retailer	18%	4
TOTAL		22



## Q2: Please RANK your BESTSELLING (by \$\$) product/species

Answered: 22  
Skipped: 0



**CEI**

## Q2: Please RANK your BESTSELLING (by \$\$) product/species

Answered: 22  
Skipped: 0

(1 is highest.  
Enter N/A if  
the Product  
does not  
apply)

	1	2	3	4	5	6	7	8	9	10	N/A	TOTAL	SCORE
Lobster	36%	9%	0%	0%	5%	0%	0%	0%	0%	0%	50%		
	8	2	0	0	1	0	0	0	0	0	11	22	9.45
Groundfish/Finfish	9%	14%	0%	9%	0%	0%	0%	0%	0%	0%	68%		
	2	3	0	2	0	0	0	0	0	0	15	22	8.71
Oysters	23%	0%	5%	5%	9%	5%	0%	0%	0%	0%	55%		
	5	0	1	1	2	1	0	0	0	0	12	22	8.2
Mussels	14%	5%	18%	5%	5%	0%	0%	0%	0%	0%	55%		
	3	1	4	1	1	0	0	0	0	0	12	22	8.4
Scallops	9%	9%	14%	5%	5%	0%	0%	0%	0%	0%	59%		
	2	2	3	1	1	0	0	0	0	0	13	22	8.33
Sea Vegetables, such as Kelp	5%	9%	0%	0%	9%	5%	5%	0%	0%	5%	64%		
	1	2	0	0	2	1	1	0	0	1	14	22	6.25
Other Shellfish (Clams, etc.)	5%	9%	9%	5%	0%	0%	14%	0%	0%	0%	59%		
	1	2	2	1	0	0	3	0	0	0	13	22	7
Value Added/Processed/Gourmet	0%	18%	14%	18%	0%	5%	0%	0%	0%	0%	45%		
	0	4	3	4	0	1	0	0	0	0	10	22	7.75
Smoked Seafood	0%	5%	0%	0%	0%	5%	0%	5%	0%	0%	86%		
	0	1	0	0	0	1	0	1	0	0	19	22	5.67
Baitfish/Other	0%	0%	5%	0%	0%	0%	0%	5%	5%	0%	86%		
	0	0	1	0	0	0	0	1	1	0	19	22	4.33



## Q2: Please RANK your BESTSELLING (by \$\$) product/species

Answered: 22  
Skipped: 0

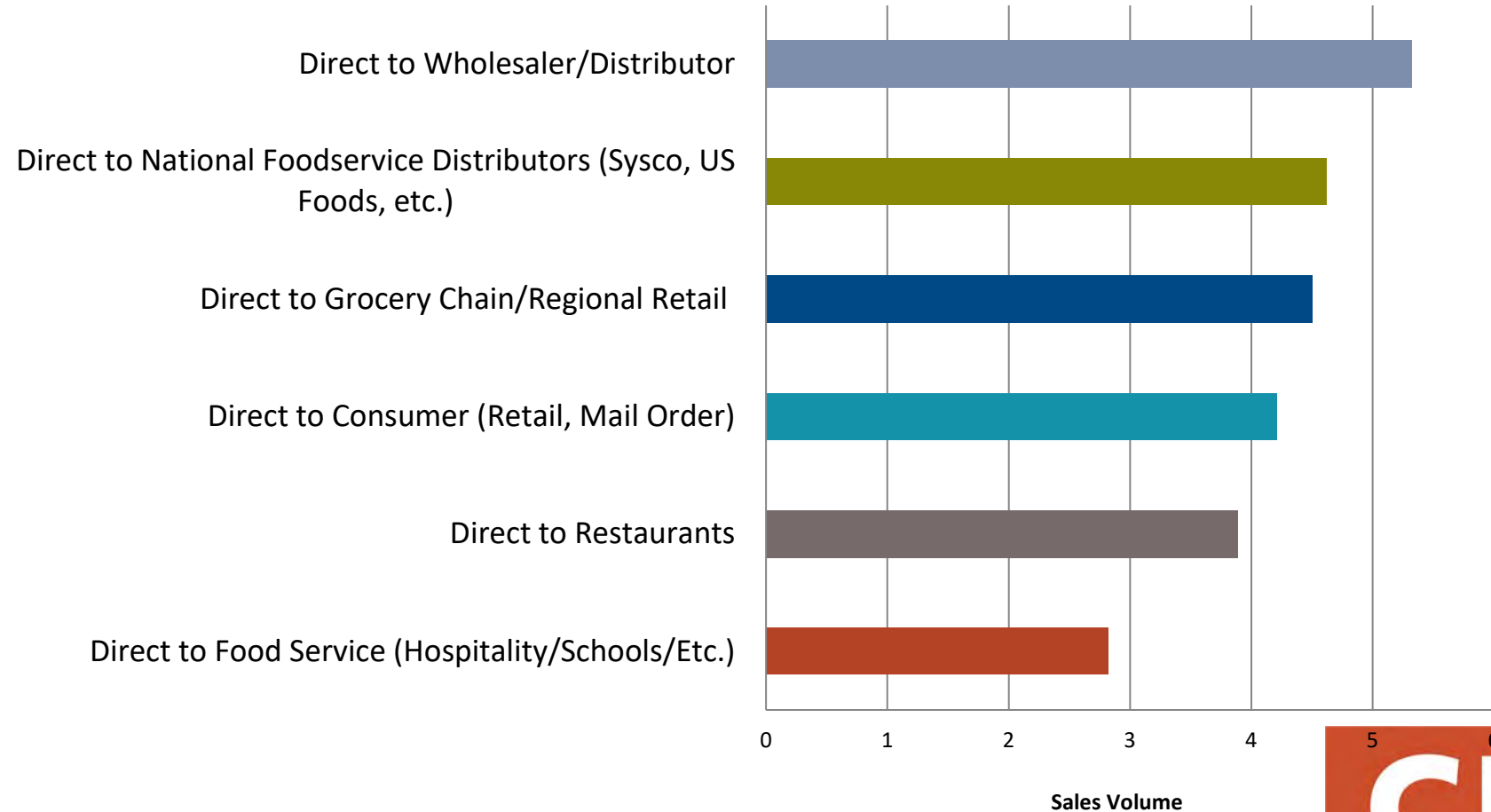
	Rank Overall	Primary Processor and Distributor Only
Lobster	9.5	9.3
Groundfish/Finfish	8.7	9.3
Mussels	8.4	7.0
Scallops	8.3	8.8
Oysters	8.2	8.8
Value Added/Processed/Gourmet	7.8	8.3
Other Shellfish (Clams, etc.)	7.0	7.6
Sea Vegetables, such as Kelp	6.3	7.5
Smoked Seafood	5.7	9.0
Baitfish/Other	4.3	5.5



## Q3: Please RANK your Sales Channels

Answered: 22  
Skipped: 0

(1 is highest  
sales volume, 6  
is lowest)



## Q3: Please RANK your Sales Channels

Answered: 22  
Skipped: 0

(1 is highest  
sales volume, 6  
is lowest)

	1	2	3	4	5	6	N/A	TOTAL	SCORE
Direct to Consumer (Retail, Mail Order)	18%	9%	18%	9%	5%	5%	36%		
	4	2	4	2	1	1	8	22	4.21
Direct to Restaurants	9%	23%	23%	9%	14%	5%	18%		
	2	5	5	2	3	1	4	22	3.89
Direct to Food Service (Hospitality/Schools/Etc.)	0%	0%	9%	27%	9%	5%	50%		
	0	0	2	6	2	1	11	22	2.82
Direct to Wholesaler/Distributor	50%	23%	5%	9%	0%	0%	14%		
	11	5	1	2	0	0	3	22	5.32
Direct to National Foodservice Distributors (Sysco, US Foods, etc.)	9%	32%	9%	5%	5%	0%	41%		
	2	7	2	1	1	0	9	22	4.62
Direct to Grocery Chain/Regional Retail	14%	9%	18%	0%	0%	5%	55%		
	3	2	4	0	0	1	12	22	4.5



### Q3: Please RANK your Sales Channels

Answered: 22  
Skipped: 0

	Rank Overall	Primary Processor and Distributor Only
Direct to Wholesaler/Distributor	5.3	4.8
Direct to National Foodservice Distributors (Sysco, US Foods, etc.)	4.6	4.2
Direct to Grocery Chain/Regional Retail	4.5	3.2
Direct to Consumer (Retail, Mail Order)	4.2	1.5
Direct to Restaurants	3.9	2.8
Direct to Food Service (Hospitality/Schools/Etc.)	2.8	1.4

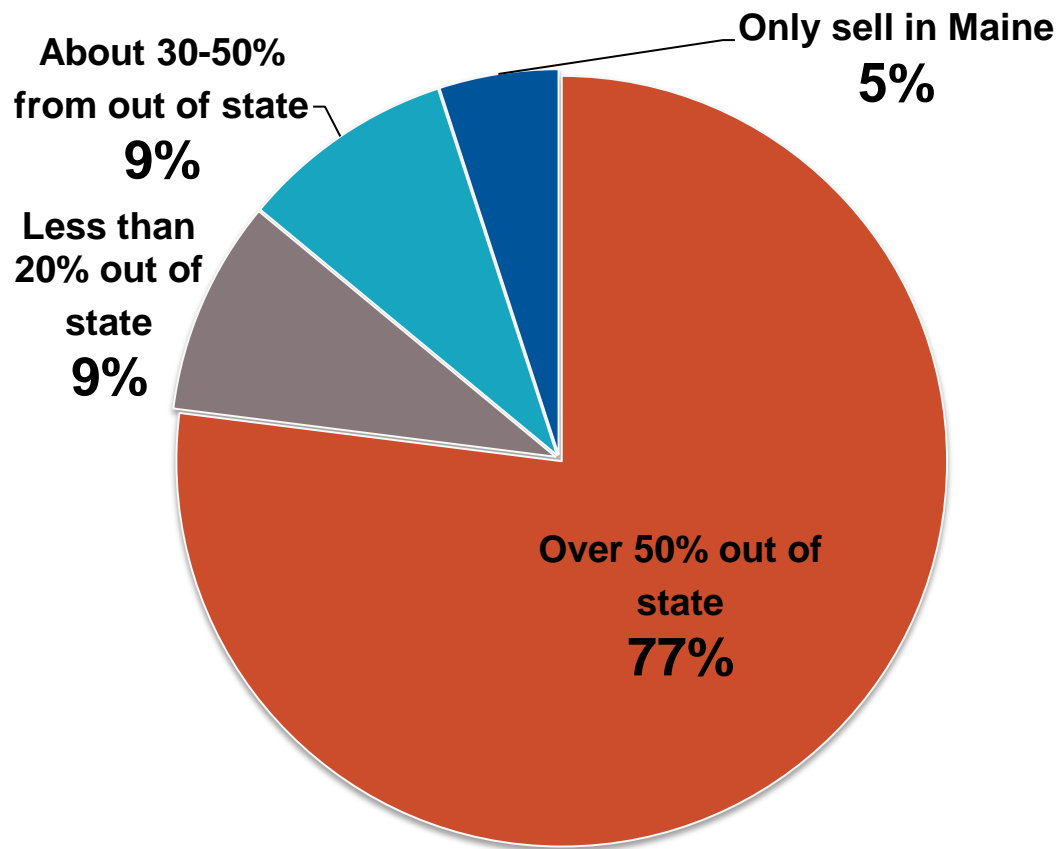




## Q4: Which BEST describes your customer market?

Answered: 22  
Skipped: 0

(excludes  
internet sales)



- Over 50% of sales are from out of state
- Less than 20% of sales are from out of state
- About 30-50% of sales are from out of state
- Only sell products in Maine

## Q4: Which BEST describes your customer market?

Answered: 22  
Skipped: 0

(excludes  
internet sales)

ANSWER CHOICES	RESPONSES	
Over 50% of sales are from out of state	77%	17
Less than 20% of sales are from out of state	9%	2
About 30-50% of sales are from out of state	9%	2
Only sell products in Maine	5%	1
TOTAL		22

## Q4: Which BEST describes your customer market?

Answered: 22  
Skipped: 0

(excludes internet sales)

ANSWER CHOICES	Overall	Primary Processor and Wholesale Only	
Over 50% of sales are from out of state	77%	17	0
Less than 20% of sales are from out of state	9%	2	1
About 30-50% of sales are from out of state	9%	2	1
Only sell products in Maine	5%	1	10
TOTAL		22	12

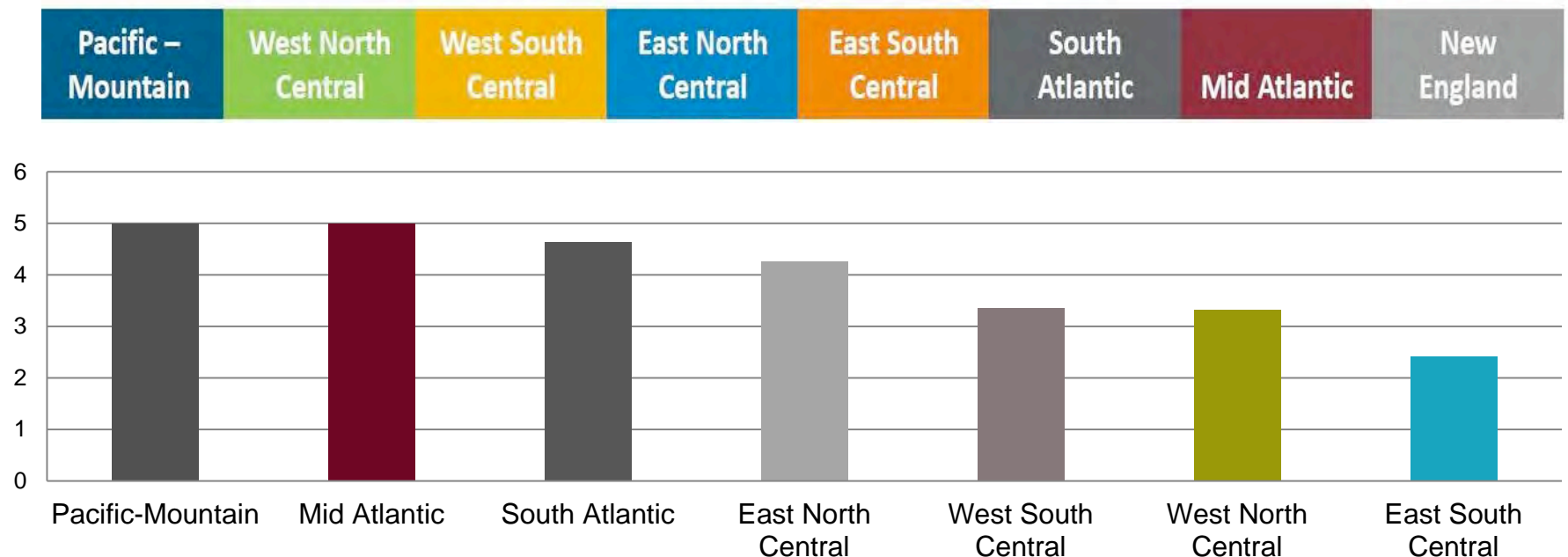




## Q5: Which Regions outside of New England do you believe hold the GREATEST MARKET POTENTIAL for your Seafood Products?

Answered: 22  
Skipped: 0

(1 is highest potential, 7 is lowest)



## Q5: Which Regions outside of New England do you believe hold the GREATEST MARKET POTENTIAL for your Seafood Products?

Answered: 22  
Skipped: 0

(1 is highest  
potential, 7 is  
lowest)

	1	2	3	4	5	6	7	TOTAL	SCORE
Pacific-Mountain	27%	23%	23%	5%	5%	9%	9%		
	6	5	5	1	1	2	2	22	5
West North Central	0%	14%	14%	18%	18%	18%	18%		
	0	3	3	4	4	4	4	22	3.32
West South Central	0%	9%	14%	27%	18%	18%	14%		
	0	2	3	6	4	4	3	22	3.36
East North Central	18%	5%	18%	14%	36%	9%	0%		
	4	1	4	3	8	2	0	22	4.27
East South Central	0%	0%	5%	23%	14%	27%	32%		
	0	0	1	5	3	6	7	22	2.41
South Atlantic	23%	32%	9%	5%	5%	9%	18%		
	5	7	2	1	1	2	4	22	4.64
Mid Atlantic	32%	18%	18%	9%	5%	9%	9%		
	7	4	4	2	1	2	2	22	5



## Q5: Which Regions outside of New England do you believe hold the **GREATEST MARKET POTENTIAL** for your Seafood Products?

Answered: 22  
Skipped: 0

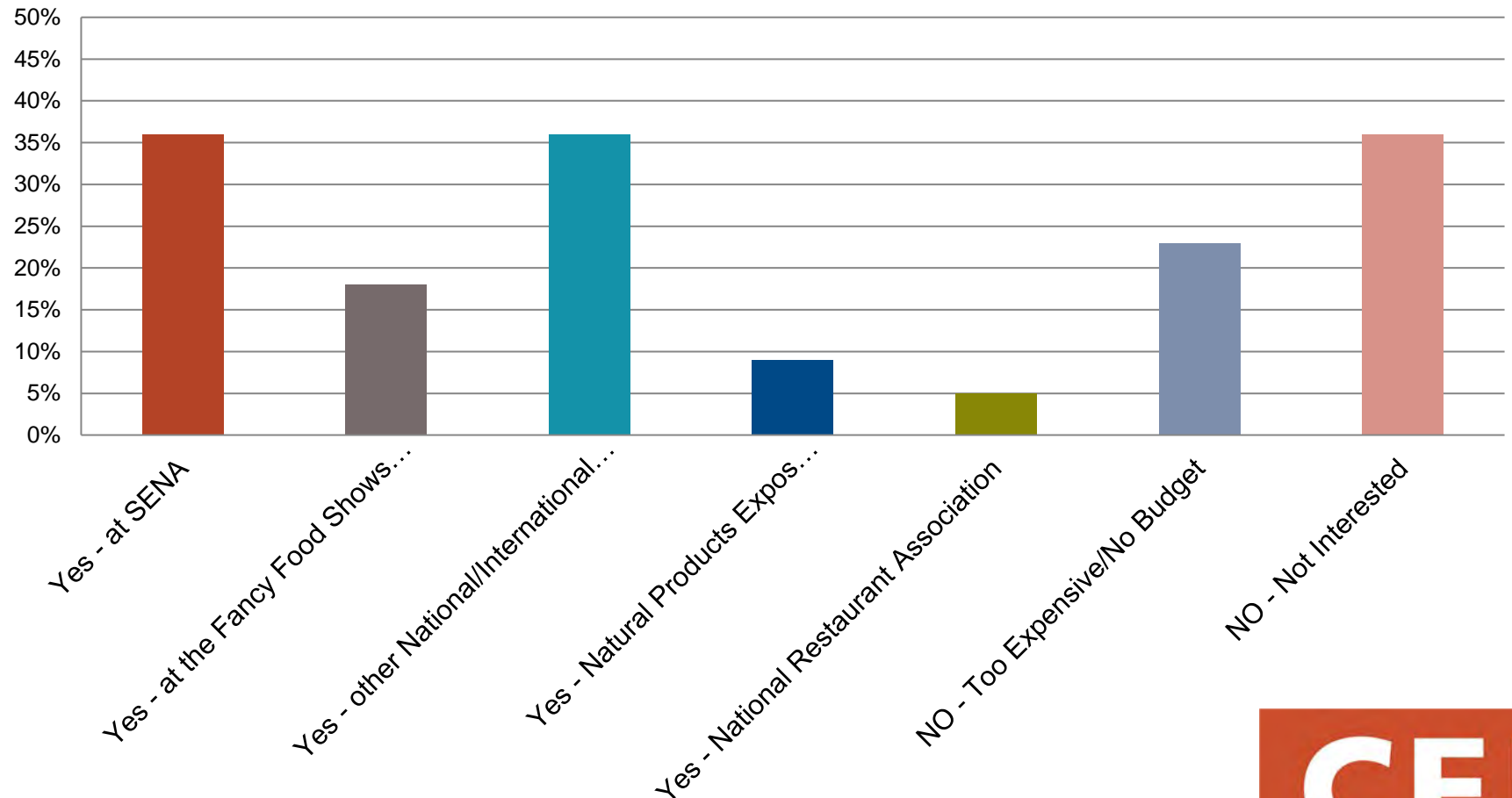
(1 is highest  
potential, 7 is  
lowest)

	Rank Overall	Primary Processor and Distributor Only
Pacific-Mountain	5.0	4.6
West North Central	3.3	3.4
West South Central	3.4	3.8
East North Central	4.3	4.5
East South Central	2.4	2.3
South Atlantic	4.6	4.7
Mid Atlantic	5.0	4.8



## Q6: Do you exhibit at Trade Shows? (Check any that apply)

Answered: 22  
Skipped: 0



## Q6: Do you exhibit at Trade Shows? (Check any that apply)

Answered: 22  
Skipped: 0

ANSWER CHOICES	RESPONSES	
Yes - at SENA	36%	8
Yes - at the Fancy Food Shows (East/West Coast)	18%	4
Yes - other National/International Shows	36%	8
Yes - Natural Products Expos (East/West)	9%	2
Yes - National Restaurant Association	5%	1
NO - Too Expensive/No Budget	23%	5
NO - Not Interested	36%	8
Total Respondents: 22		

## Q6: Do you exhibit at Trade Shows?

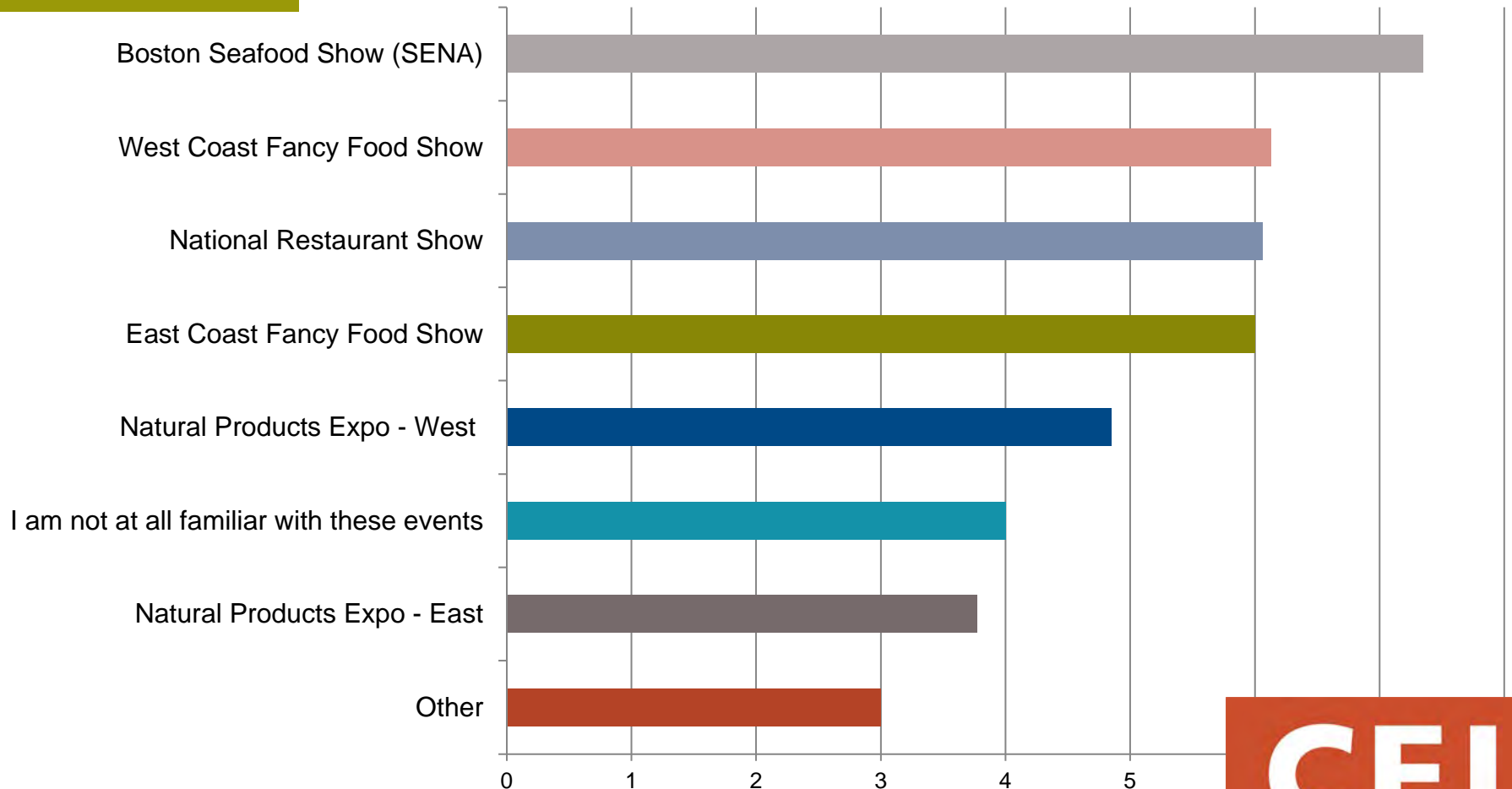
Answered: 22  
Skipped: 0

ANSWER CHOICES	Overall		Primary Processor and Wholesale Only	
Yes - at SENA	36%	8	58%	7
Yes - at the Fancy Food Shows (East/West Coast)	18%	4	33%	4
Yes - other National/International Shows	36%	8	58%	7
Yes - Natural Products Expos (East/West)	9%	2	17%	2
Yes - National Restaurant Association	5%	1	8%	1
NO - Too Expensive/No Budget	23%	5	8%	1
NO - Not Interested	36%	8	25%	1
Total Respondents		22		12

**Q7: If you could pick any US Trade Shows/B2B Events, which would you want to have a Maine Seafood Marketing booth location at?**

Answered: 22  
Skipped: 0

Please rank -  
with 1 being  
best fit.





**Q7: If you could pick any US Trade Shows/B2B Events, which would you want to have a Maine Seafood Marketing booth location at?**



Answered: 22  
Skipped: 0

Please rank -  
with 1 being  
best fit.

	1	2	3	4	5	6	7	8	N/A	TOTAL	SCORE
Boston Seafood Show (SENA)	59%	23%	0%	5%	0%	5%	0%	0%	9%		
	13	5	0	1	0	1	0	0	2	22	7.35
East Coast Fancy Food Show	0%	18%	45%	0%	9%	0%	0%	0%	27%		
	0	4	10	0	2	0	0	0	6	22	6
West Coast Fancy Food Show	18%	9%	18%	23%	0%	5%	0%	0%	27%		
	4	2	4	5	0	1	0	0	6	22	6.13
National Restaurant Show	14%	23%	0%	27%	9%	0%	0%	0%	27%		
	3	5	0	6	2	0	0	0	6	22	6.06
Natural Products Expo - East	0%	5%	5%	5%	5%	41%	0%	0%	41%		
	0	1	1	1	1	9	0	0	9	22	3.77
Natural Products Expo - West	5%	5%	5%	9%	36%	0%	0%	0%	41%		
	1	1	1	2	8	0	0	0	9	22	4.85
Other	0%	0%	5%	0%	5%	0%	18%	0%	73%		
	0	0	1	0	1	0	4	0	16	22	3
I am not at all familiar with these events	5%	5%	0%	5%	0%	0%	5%	9%	73%		
	1	1	0	1	0	0	1	2	16	22	4



**Q7: If you could pick any US Trade Shows/B2B Events, which would you want to have a Maine Seafood Marketing booth location at?**

Answered: 22  
Skipped: 0



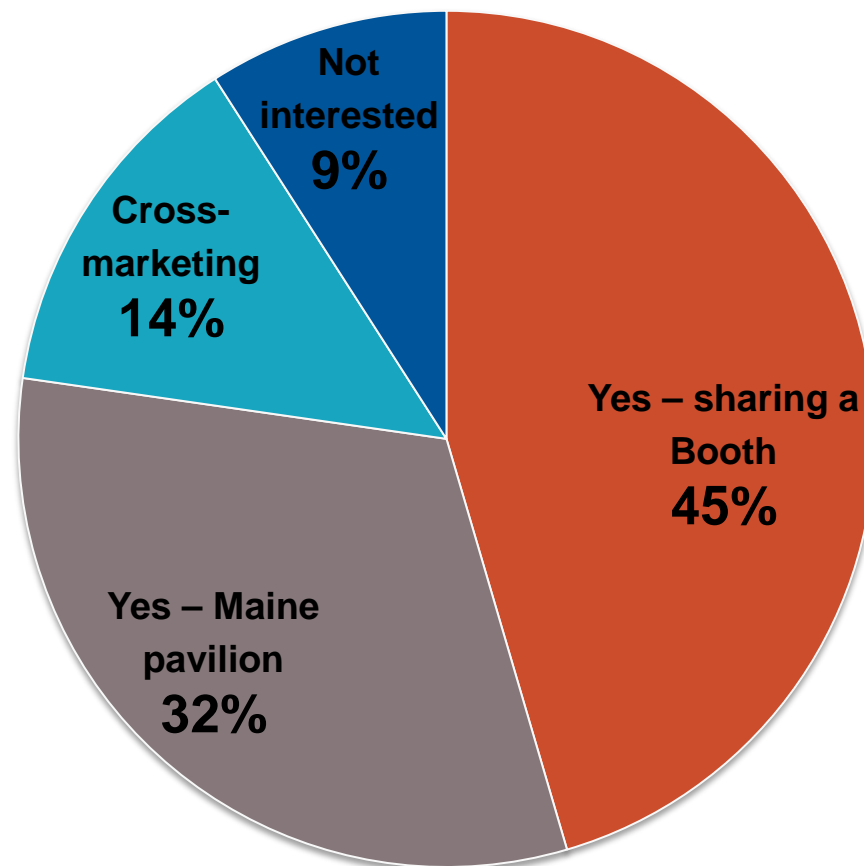
	Rank Overall	Primary Processor and Distributor Only
Boston Seafood Show (SENA)	7.4	7.3
East Coast Fancy Food Show	6.0	6.1
West Coast Fancy Food Show	6.1	5.9
National Restaurant Show	6.1	6.3
Natural Products Expo - East	3.8	3.9
Natural Products Expo - West	4.9	4.9
Other	3.0	4.0
I am not at all familiar with these events	4.0	3.5



**Q8: If you had access to a Exhibit Booth promoting Maine Seafood, and/or had shared representation at domestic Trade Shows, would you be interested in exhibiting?**



Answered: 22  
Skipped: 0



- Yes - ok with sharing a Booth with other Maine Seafood companies
- Yes - would be part of a Maine pavilion, but only with our own Booth
- We have our own booth, but would like to learn more about cross-marketing opportunities at Trade Shows
- NO - not interested, not useful



**Q8: If you had access to a Exhibit Booth promoting Maine Seafood, and/or had shared representation at domestic Trade Shows, would you be interested in exhibiting?**

Answered: 22  
Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes - ok with sharing a Booth with other Maine Seafood companies	45%	10
Yes - would be part of a Maine pavilion, but only with our own Booth	32%	7
We have our own booth, but would like to learn more about cross-marketing opportunities at Trade Shows	14%	3
NO - not interested, not useful	9%	2
TOTAL		22



**Q8: If you had access to a Exhibit Booth promoting Maine Seafood, and/or had shared representation at domestic Trade Shows, would you be interested in exhibiting?**

Answered: 22  
Skipped: 0

ANSWER CHOICES	Overall	Primary Processor and Wholesale Only	
Yes - ok with sharing a Booth with other Maine Seafood companies	45%	10	8%
Yes - would be part of a Maine pavilion, but only with our own Booth	32%	7	58%
We have our own booth, but would like to learn more about cross-marketing opportunities at Trade Shows	14%	3	25%
NO - not interested, not useful	9%	2	8%
Total Respondents		22	12



## Q9: What gaps or barriers - if any - impact your company's ability to expand your markets?

Answered: 22  
Skipped: 0

Rank with 1  
being the  
largest  
barrier, 5  
being the  
lowest.

	1	2	3	4	5 N/A	TOTAL	SCORE
Not enough dedicated salespeople/salesforce	36%	9%	18%	0%	0%	36%	
	8	2	4	0	0	8	22
Need to do more marketing to expand interest beyond local Maine marketplace	14%	36%	5%	5%	5%	36%	
	3	8	1	1	1	8	22
Insufficient supply - we can't produce/buy enough product to even meet demand	32%	5%	14%	9%	5%	36%	
	7	1	3	2	1	8	22
Too much competition - not price competitive out of state	9%	18%	14%	9%	5%	45%	
	2	4	3	2	1	10	22
We want to expand into other US markets beyond New England, but don't know how	0%	5%	5%	9%	9%	73%	
	0	1	1	2	2	16	22

## Q9: What gaps or barriers - if any - impact your company's ability to expand your markets?

Answered: 22  
Skipped: 0

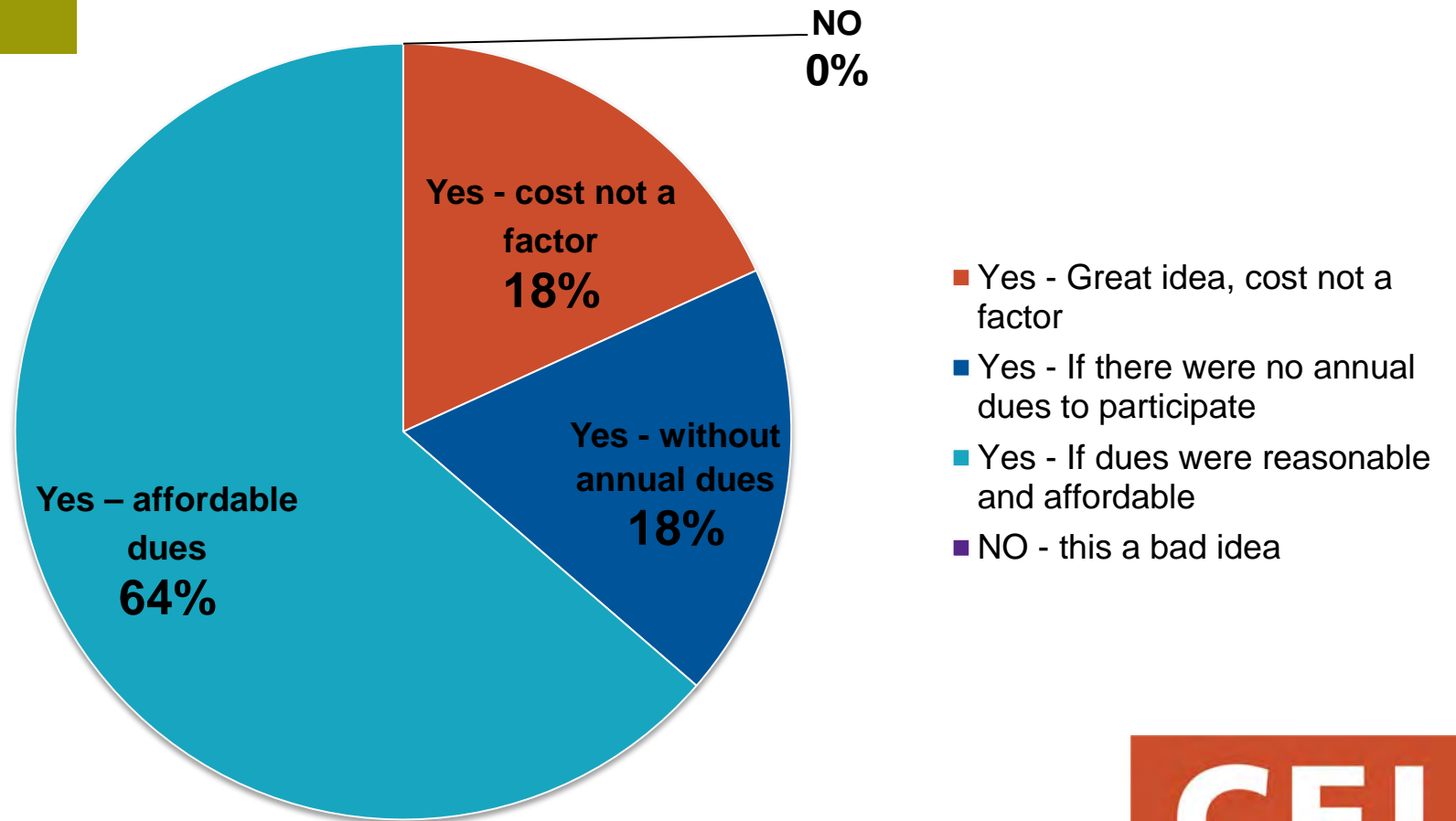
Rank with 1 being the largest barrier, 5 being the lowest.

(Only Primary Processor/  
Value-Added Processor and  
Wholesale/  
Distributors)

	1	2	3	4	5	N/A	TOTAL	SCORE
Not enough dedicated salespeople/salesforce	42%	17%	0%	0%	0%	33%		
	5	2	1	0	0	4	12	4.50
Need to do more marketing to expand interest beyond local Maine marketplace	17%	33%	8%	0%	0%	42%		
	2	4	1	0	0	5	12	4.14
Insufficient supply - we can't produce/buy enough product to even meet demand	17%	0%	17%	17%	0%	50%		
	2	0	2	2	0	6	12	3.33
Too much competition - not price competitive out of state	17%	17%	17%	0%	8%	42%		
	2	2	2	0	1	5	12	3.57
We want to expand into other US markets beyond New England, but don't know how	0%	8%	0%	8%	8%	75%		
	0	1	0	1	1	9	12	2.33

**Q10: Finally, if a Maine Seafood Marketing Association was formed promoting ALL of Maine's seafood products, would you support it/participate?**

Answered: 22  
Skipped: 0



**Q10: Finally, if a Maine Seafood Marketing Association was formed promoting ALL of Maine's seafood products, would you support it/participate?**

Answered: 22  
Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes - Great idea, cost not a factor	18%	4
Yes - If there were no annual dues to participate	18%	4
Yes - If dues were reasonable and affordable	64%	14
NO - this a bad idea	0%	0
TOTAL		22

**Q10: Finally, if a Maine Seafood Marketing Association was formed promoting ALL of Maine's seafood products, would you support it/participate?**

Answered: 22  
Skipped: 0

ANSWER CHOICES	Overall	Primary Processor and Wholesale Only		
Yes - Great idea, cost not a factor	18%	4	25%	3
Yes - If there were no annual dues to participate	18%	4	0%	0
Yes - If dues were reasonable and affordable	64%	14	75%	9
NO - this a bad idea	0%	0	0%	0
Total Respondents		22		12



## FOR MORE INFORMATION



### **Principal Investigator**

Nick Branchina

Director, Fisheries & Aquaculture Program

Coastal Enterprises, Inc.

p 207.295-4912

e [nbranchina@ceimaine.org](mailto:nbranchina@ceimaine.org)

[www.ceimaine.org/msmi](http://www.ceimaine.org/msmi)



### **Consulting Investigator**

Janine Bisaillon Cary

President

Montserrat Group

e [JBCary@montserratgroup.net](mailto:JBCary@montserratgroup.net)

[www.montserratgroup.net](http://www.montserratgroup.net)