



How Does Brand Affect Demand for Frozen Shrimp? An Analysis of Store-based Scanner Data in the United States

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Research Questions

- **Does brand matters to the shrimp consumers in USA?**
- **If so, what is the strength of various brands?**
- **How do brand strengths vary by shrimp products, markets and time? why?**

What is Brand Equity?

- **Brand Equity is often defined as ‘the set of associations and behavior on the part of a brand’s customers, channel members and parent corporation that permits the brand to earn **greater volume** or **greater margins** than it could without the brand name’ (Leuthesser, 1988).**

How to Measure Brand Equity?

- Acker (1996) suggested ten sets of measures
- We have used two indicators:
 - Market Share
 - Price Premium
- **Data:** Nielsen Company ScanTrack data, collected under the Expanded All Outlets Combined (xAOC) dataset.
- **Time Period:** 2009-2012.
- **Study Markets (10):** Atlanta, Boston, Chicago, Detroit, Los Angeles, New York, Philadelphia, Pittsburgh, San Francisco and Washington D.C.

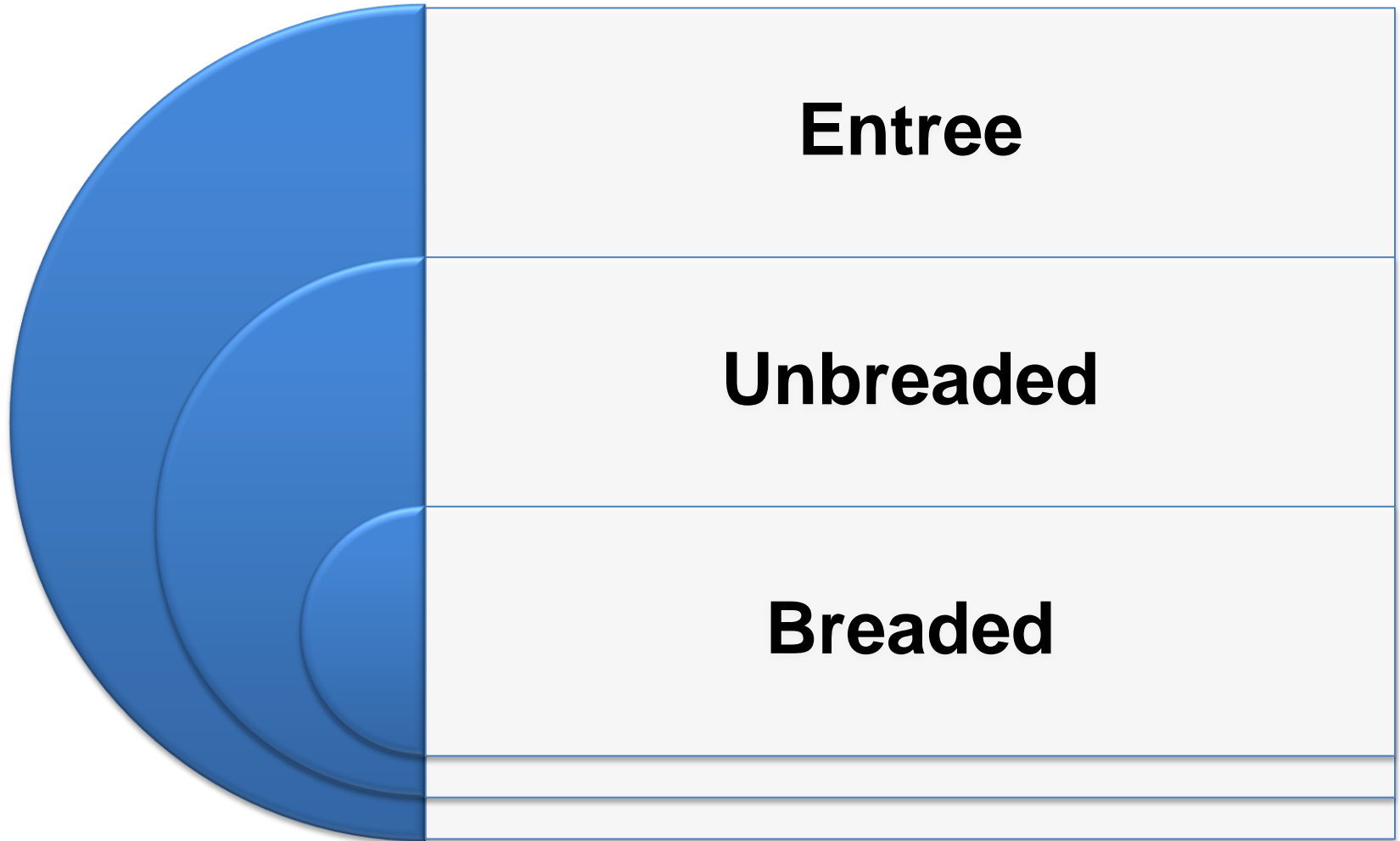
Markets covered

Atlanta, Boston, Chicago, Detroit, Los Angeles, New York, Philadelphia, Pittsburgh, San Francisco & Washington D.C



Time period covered
2009 to 2012

Categories of Shrimp Products

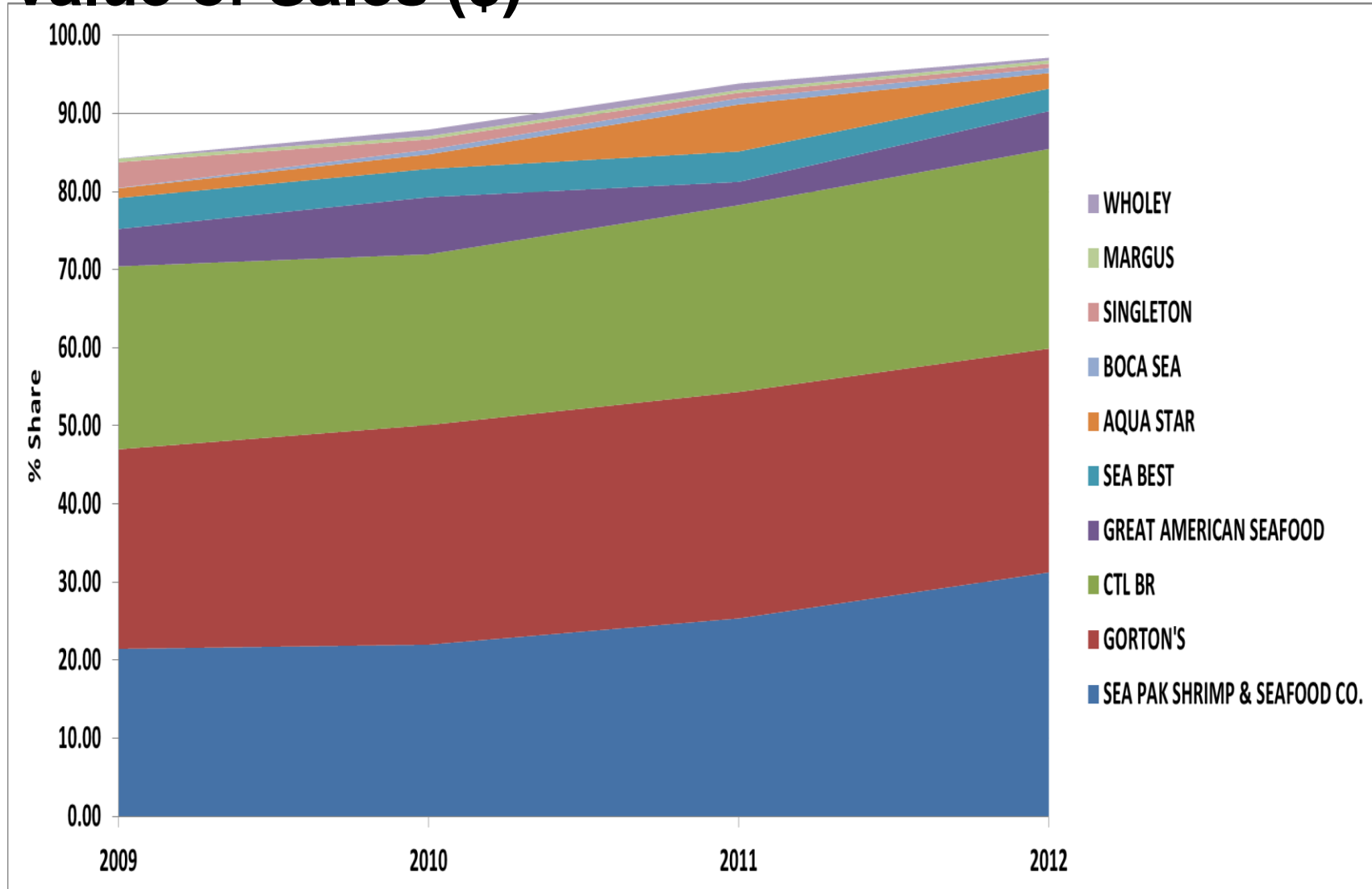


Number of Brands in Shrimp Market

Year	Unbreaded	Breaded
2009	235	55
2010	236	48
2011	235	46
2012	227	41

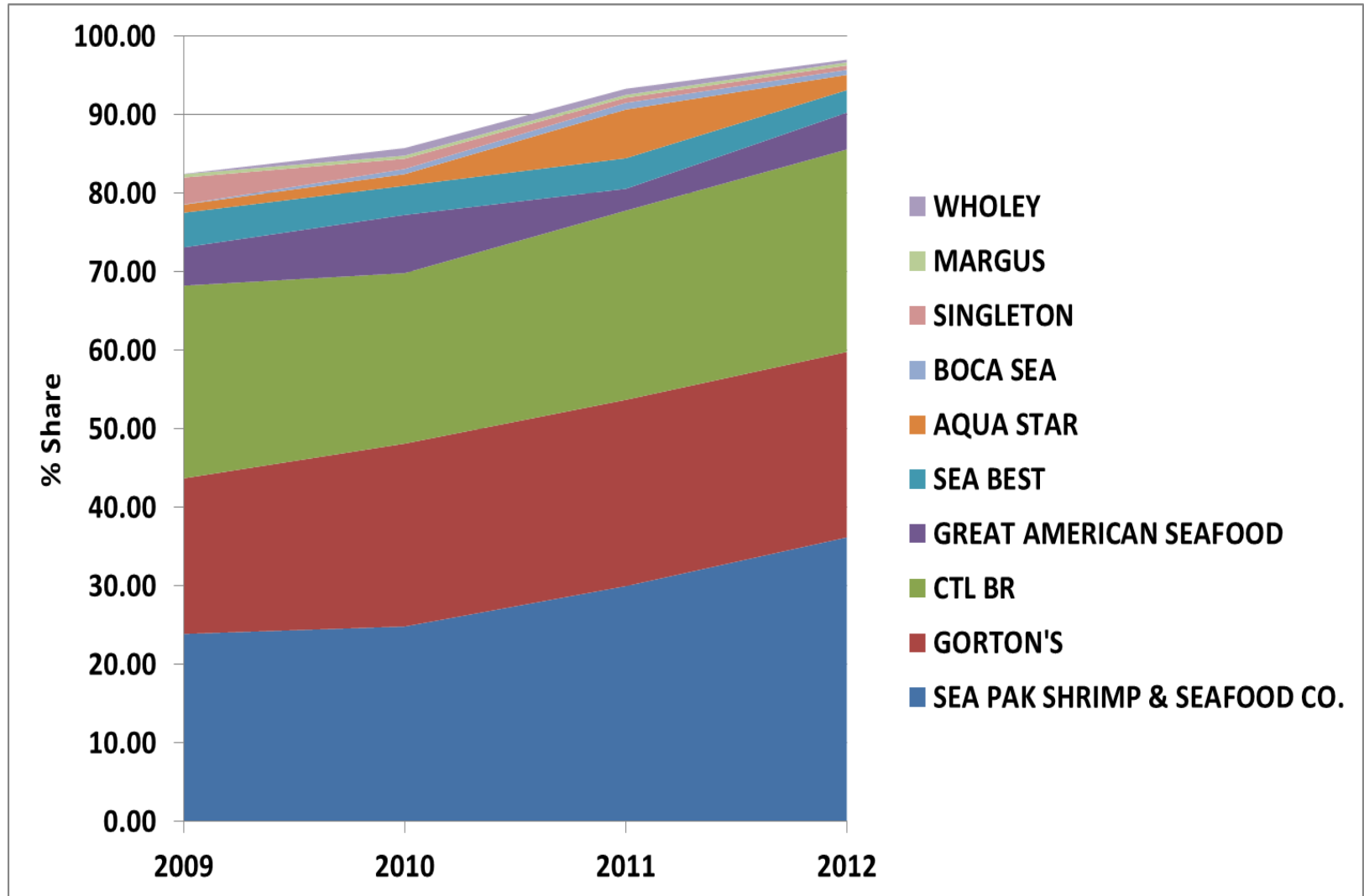
Market Share in Breaded Shrimp

Value of Sales (\$)



Market Share in Breaded Shrimp

Volume of Sales (Lbs)



Leading Brands in Breaded Shrimp

Volume of Sales (\$)

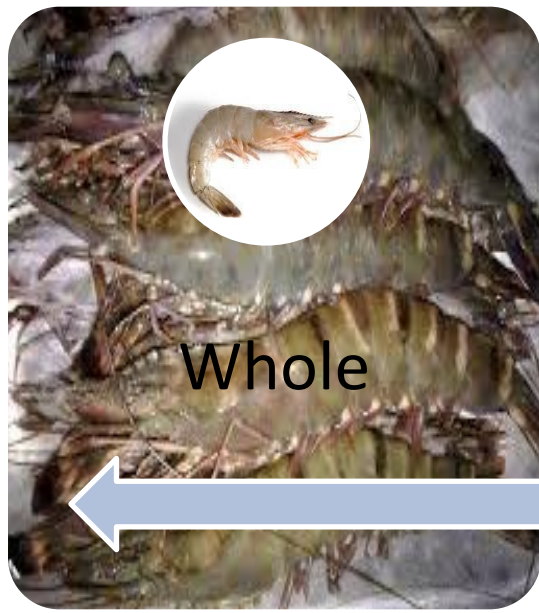
Brand Description	2009	2010	2011	2012
SEA PAK SHRIMP & SEAFOOD CO.	3	2	2	1
GORTON'S	1	1	1	2
CTL BR (Store Brand)	2	3	3	3
GREAT AMERICAN SEAFOOD	5	3	6	4
SEA BEST	6	6	5	5
AQUA STAR	10	7	4	6
BOCA SEA	30	12	10	7
SINGLETON	7	9	11	8
MARGUS	13	15	15	9
WHOLEY	31	11	9	10

Leading Brands in Breaded Shrimp

Volume of Sales (Lbs)

BRAND DESCRIPTION	2009	2010	2011	2012
SEA PAK SHRIMP & SEAFOOD CO.	2	1	1	1
CTL BR (Store Brand)	1	3	2	2
GORTON'S	3	2	3	3
GREAT AMERICAN SEAFOOD	5	5	6	4
SEA BEST	6	6	5	5
AQUA STAR	10	9	4	6
BOCA SEA	30	12	9	7
SINGLETON	7	10	11	8
TREASURE ISLE	8	8	7	9
MARGUS	14	14	14	10

Unbreaded Shrimp Products



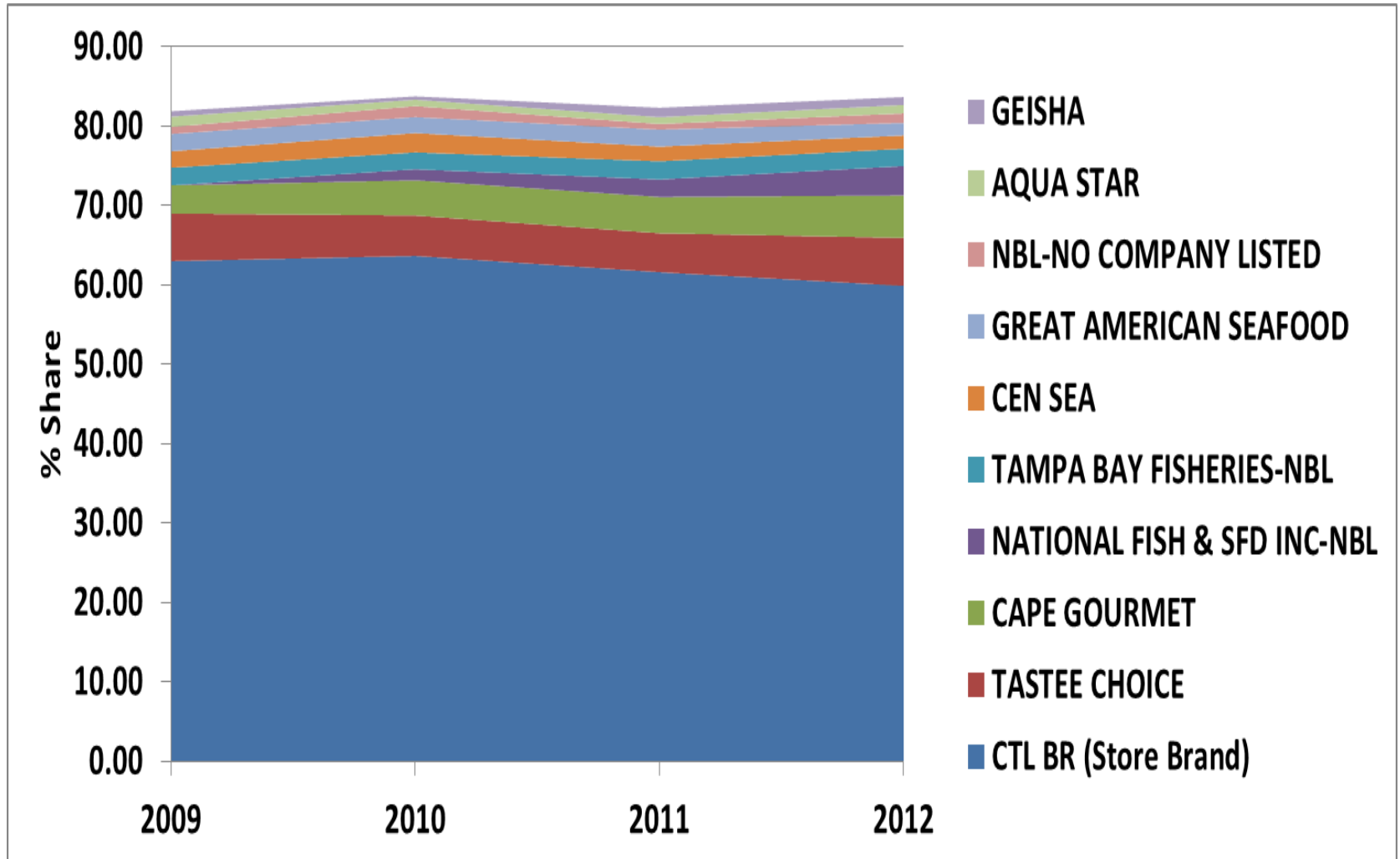
← **Raw** →



← **Cooked** →

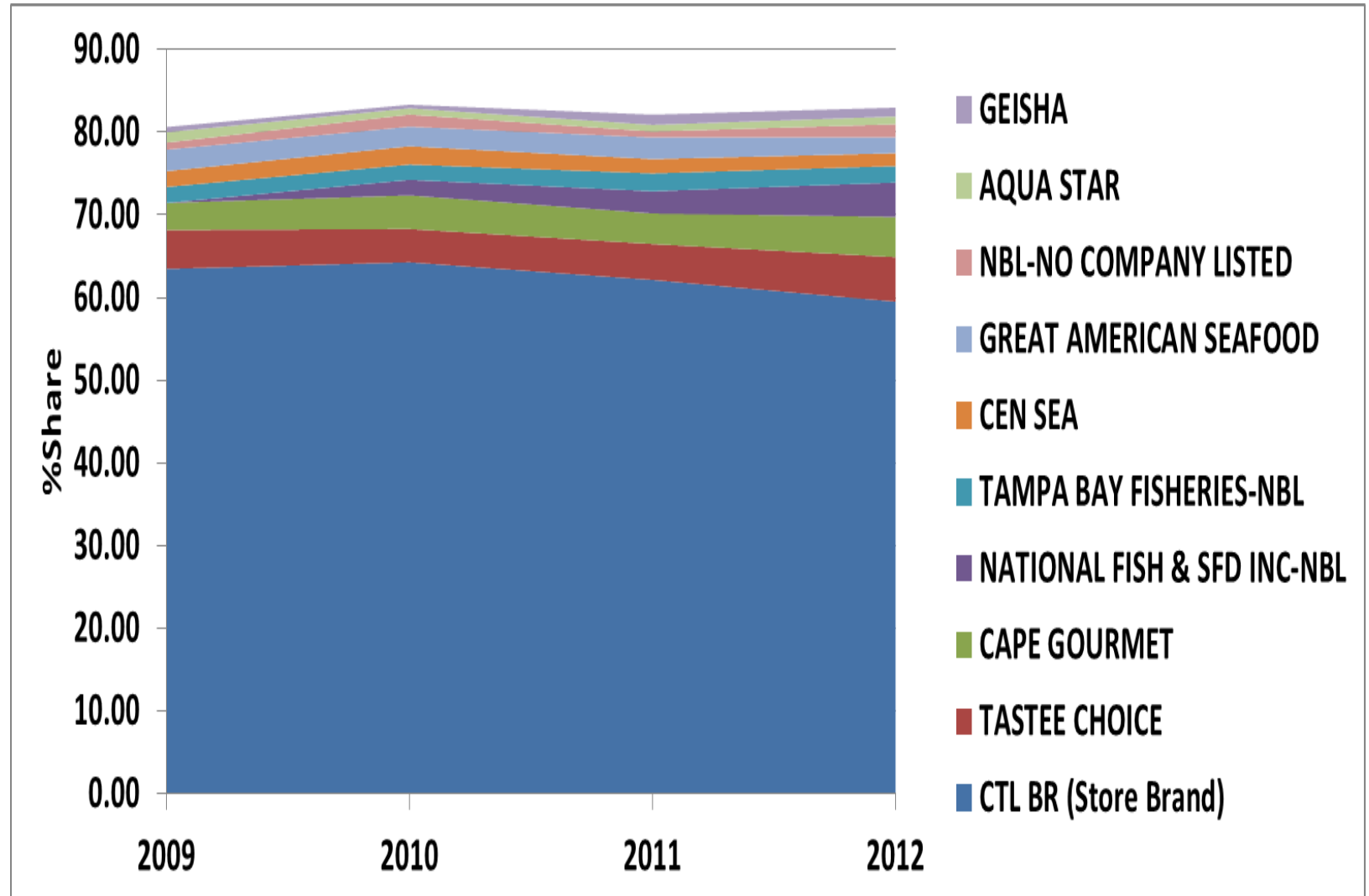
Market Share in Unbreaded Shrimp

Value of Sales (\$)



Market Share in Unbreaded Shrimp

Volume of Sales (Lbs)



Leading Brands in Unbreaded Shrimp

Volume of Sales (Lbs)

Brand	2009Lb	2010Lb	2011Lb	2012Lb
CTL BR (Store Brand)	1	1	1	1
TASTEE CHOICE	2	3	2	2
CAPE GOURMET	3	2	3	3
NATIONAL FISH & SFD INC-NBL	47	6	4	4
TAMPA BAY FISHERIES-NBL	5	7	6	5
GREAT AMERICAN SEAFOOD	4	4	5	6
NBL-NO COMPANY LISTED	12	8	15	7
CEN SEA	6	5	7	8
MAY	20	21	26	9
GEISHA	18	22	9	10

Leading Brands in Unbreaded Shrimp

Value of Sales (\$)

BRAND DESCRIPTION	2009	2010	2011	2012
CTL BR (Store Brand)	1	1	1	1
TASTEE CHOICE	2	2	2	2
CAPE GOURMET	3	3	3	3
NATIONAL FISH & SFD INC-NBL	47	7	5	4
TAMPA BAY FISHERIES-NBL	4	5	4	5
CEN SEA	6	4	8	6
GREAT AMERICAN SEAFOOD	5	6	6	7
NBL-NO COMPANY LISTED	11	8	14	8
AQUA STAR	8	11	11	9
GEISHA	14	21	9	10



**Do brand strengths vary across
markets?**

Leading Brands in Unbreaded Shrimp: 2012

Brand Rank #	Atlanta	Boston
#1	CTL BR (Store Brand)	CTL BR (Store Brand)
#2	NATIONAL FISH & SFD INC-NBL	CHICKEN OF THE SEA
#3	SEA BEST	CEN SEA
#4	TAMPA BAY FISHERIES-NBL	LEGAL SEA FOODS
#5	ROYAL WHITE	NATIONAL FISH & SFD INC-NBL
#6	AQUA STAR INC-NBL	SEAMAZZ
#7	ROYAL TIGER	TAMPA BAY FISHERIES-NBL
#8	AQUA STAR	COX'S
#9	DIAMOND REEF	SAIL
#10	SINGLETON	SEA BEST

Leading Brands in Unbreaded Shrimp: 2012

Brand Rank #	Chicago	Detroit
#1	CTL BR (Store Brand)	CTL BR (Store Brand)
#2	SUPREME CHOICE	NATIONAL FISH & SFD INC-NBL
#3	NATIONAL FISH & SFD INC-NBL	TAMPA BAY FISHERIES-NBL
#4	TAMPA BAY FISHERIES-NBL	CEN SEA
#5	ASIAN CLASSIC	WHOLEY
#6	CEN SEA	HARVEST OF THE SEA
#7	SEA TO SEA	SAIL
#8	JADE LION	MATLAW'S
#9	MATLAW'S	PLATINUM AHOME HARVEST
#10	THE BBQ BAY GRILLING CO.	CONTESSA

Leading Brands in Unbreaded Shrimp: 2012

Brand Rank #	Los Angeles	New York
#1	CTL BR (Store Brand)	CTL BR (Store Brand)
#2	GREAT AMERICAN SEAFOOD	TASTEE CHOICE
#3	MAY	CAPE GOURMET
#4	TAMPA BAY FISHERIES-NBL	AQUA STAR
#5	NATIONAL FISH & SFD INC-NBL	NBL-NO COMPANY LISTED
#6	SEA CATCH	GEISHA
#7	PACIFIC	GREAT AMERICAN SEAFOOD
#8	STAR FISHERIES INC-NBL	MAY
#9	GALLETTI BROTHERS	NATIONAL FISH & SFD INC-NBL
#10	SEA BEST	SAIL

Leading Brands in Unbreaded Shrimp: 2012

Brand Rank #	Philadelphia	Pittsburgh
#1	CTL BR (Store Brand)	CTL BR (Store Brand)
#2	TASTEE CHOICE	SEAMAZZ
#3	CAPE GOURMET	DELICA SEA
#4	NATIONAL FISH & SFD INC-NBL	BLUE SEA
#5	TAMPA BAY FISHERIES-NBL	CEN SEA
#6	CEN SEA	TAMPA BAY FISHERIES-NBL
#7	MATLAW'S	NATIONAL FISH & SFD INC-NBL
#8	GEISHA	THE BBQ BAY GRILLING CO.
#9	CHEF'S NET	WHOLEY
#10	NBL-NO COMPANY LISTED	ASIAN CLASSIC

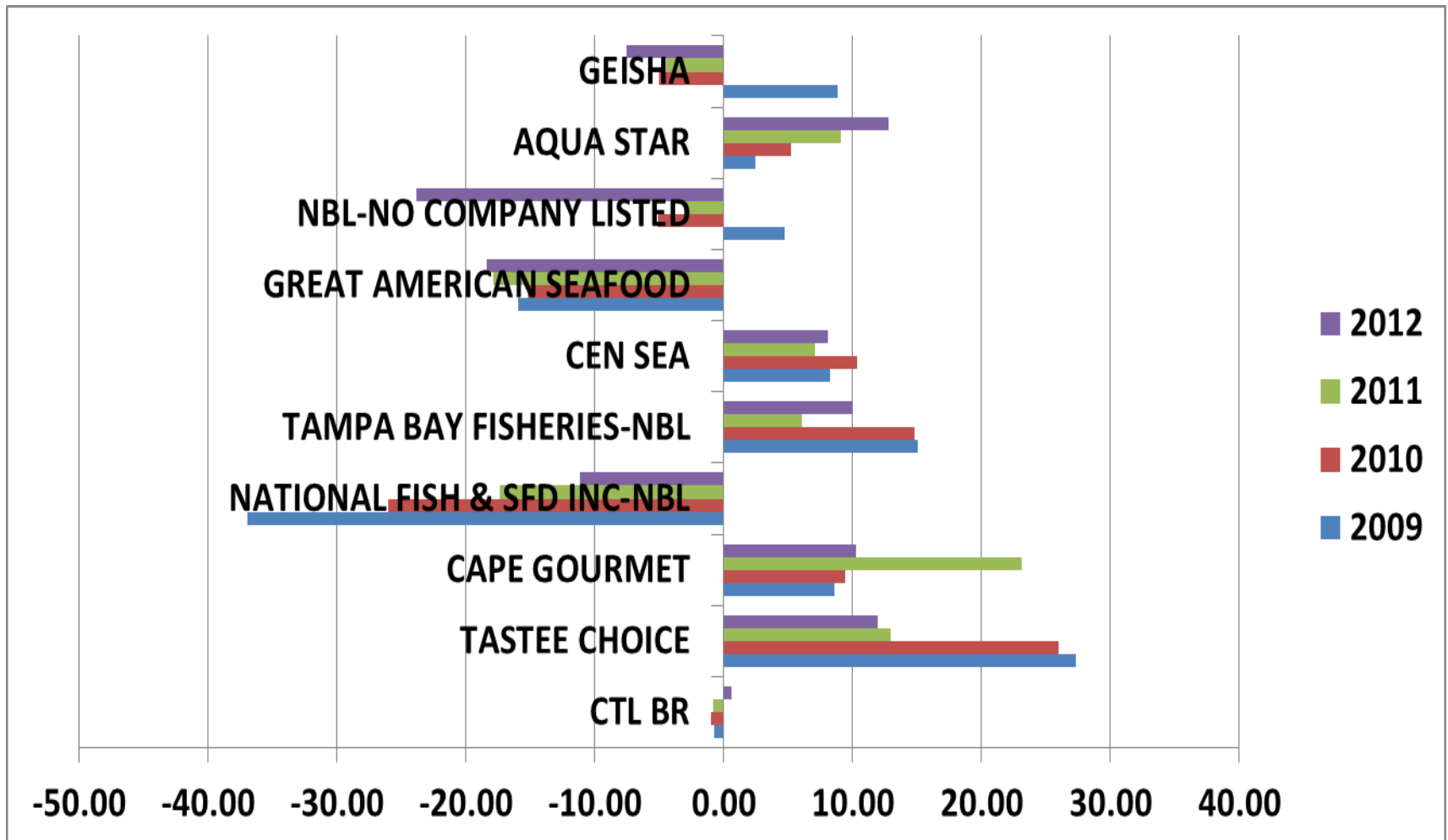
Leading Brands in Unbreaded Shrimp: 2012

Brand Rank #	San Francisco	Washington DC
#1	CTL BR (Store Brand)	CTL BR (Store Brand)
#2	VICTORY SEAFOOD	NATIONAL FISH & SFD INC-NBL
#3	NATIONAL FISH & SFD INC-NBL	CEN SEA
#4	CEN SEA	RAINBOW SEAFOOD COMPANY
#5	GREAT AMERICAN SEAFOOD	TAMPA BAY FISHERIES-NBL
#6	PLATINUM AHOME HARVEST	BAMA SEA PRODUCTS
#7	MAY	DELICA SEA
#8	COX'S WHOLESALE SEAFOOD-NBL	NBL-NO COMPANY LISTED
#9	CHICKEN OF THE SEA	CHICKEN OF THE SEA
#10	BORNSTEIN SEAFOODS	TASTEE CHOICE

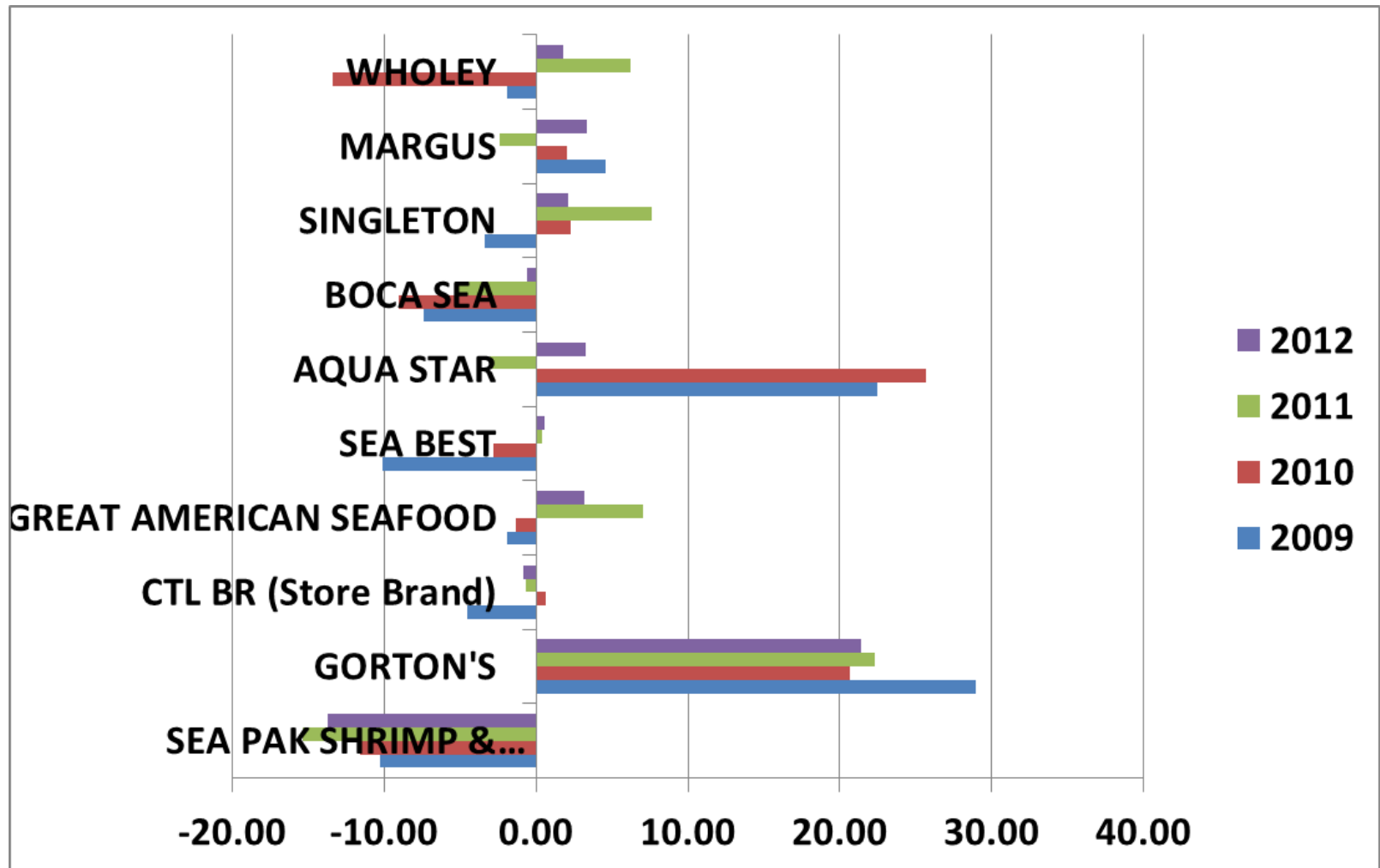
Leading Brands in Unbreaded Shrimp: 2012

City	Rank 1	Rank 2	Rank 3
Atlanta	CTL BR (Store Brand)	NATIONAL FISH & SFD INC-NBL	SEA BEST
Boston	CTL BR (Store Brand)	CHICKEN OF THE SEA	CEN SEA
Chicago	CTL BR (Store Brand)	SUPREME CHOICE	NATIONAL FISH & SFD INC-NBL
Detroit	CTL BR (Store Brand)	NATIONAL FISH & SFD INC-NBL	TAMPA BAY FISHERIES-NBL
Los Angeles	CTL BR (Store Brand)	GREAT AMERICAN SEAFOOD	MAY
New York	CTL BR (Store Brand)	TASTEE CHOICE	CAPE GOURMET
Philadelphia	CTL BR (Store Brand)	TASTEE CHOICE	CAPE GOURMET
Pittsburgh	CTL BR (Store Brand)	SEAMAZZ	DELICA SEA
San Francisco	CTL BR (Store Brand)	VICTORY SEAFOOD	NATIONAL FISH & SFD INC-NBL
Washington DC	CTL BR (Store Brand)	NATIONAL FISH & SFD INC-NBL	CEN SEA

Price Premium in Unbreaded Shrimp



Price Premium in Breaded Shrimp



Price Advantage

Price Premium

Conclusion

- **Brand equity plays an important role in US Shrimp market.**
- **Brand Strength varies across location.**
- **Price premium and price advantage influence market share of brands.**



Thank You

Breaded Shrimp Products

- **Shrimp**
- **Buffalo Shrimp**
- **Dinner Shrimp**
- **Butterfly Shrimp**
- **Popcorn Shrimp**
- **Fantail Shrimp**
- **Fantail Butterfly Shrimp**
- **Butterfly Cleantail Shrimp**