

Merking av klippfisk i det brasilianske markedet

Hvilken informasjon er relevant for forbruker og detaljist

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Rapport

Tilgjengelighet:

Åpen

<i>Tittel:</i> Merking av klippfisk i det brasilianske markedet. Hvilken informasjon er relevant for forbruker og detaljist?	<i>Dato:</i> Desember 2010
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<i>Forfatter(e):</i> Jens Østli	<i>Prosjektnr.:</i> 20903
<i>Oppdragsgiver:</i> FHF/Bacalaoforum (Faggruppe for klippfisk/saltfisk)	<i>Oppdragsgivers ref.:</i> Lorena Gallart
<i>Tre stikkord:</i> Brasil, klippfisk, forbruker	
<i>Sammendrag: (maks 200 ord)</i> <p>Brasil er et av Norges viktigste markeder for klippfisk. Eksporten har økt, konsumet likeså. Men det er liten tvil om at klippfisk er dyrt for den jevne brasilianer, i sær gjelder dette klippfisk av torsk. Dersom produktet du kjøper er dyrt, er det naturlig at mange skaffer seg kunnskap/innsikt som gjør at de er i stand til å vurdere om produktene gir "value for money". I dette prosjektet har vi ønsket å avdekke hva slags klippfiskkunnskaper som finnes hos den brasilianske forbruker og ditto hos de som selger klippfisk i butikk.</p> <p>Våre studier viser at kunnskapene er til dels svært mangelfulle, særlig når det gjelder ren faktainformasjon. Siden de fleste utsalgsstedene selger ulike typer klippfisk (torsk, sei, lange og brosme), og de butikkansatte i mindre grad synes å kunne komme med faktabaserte anbefalinger til den interesserte forbruker, kan det synes som om klippfisk som selges med betegnelsen "Porto" får drahjelp av nettopp denne betegnelsen. Annen klippfisk selges nok mest som en kombinasjon av pris og utseende.</p> <p>Mer kunnskaper om produktene kombinert med mer produktinformasjon på pakker/utsalgssteder kan bidra til at forbrukeren gjør bedre/tryggere valg. EFFs satsing i Brasil monner, men i et geografisk stort land som Brasil og med dets 200 millioner innbyggere er dette en formidabel oppgave. I sær hvis man har ambisjoner om at Norge som opphav og garantist for prima klippfisk skal være viktig når folk velger produkt i butikk.</p>	

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1 Prosjektets hoved- og delmål

Målsetningen med prosjektet er å tilegne norsk klippfisknæring kunnskap om hvilken informasjon brasilianske konsumenter og supermarkedkjeder ønsker på klippfiskproduktene.

Ved å bruke denne kunnskapen kan norsk klippfiskindustri merke sine produkter med informasjon som kan vedlikeholde og forhåpentligvis øke konsumet av norsk klippfisk i Brasil.

Følgende delmål skal lede fram til hovedmålet:

- 1.1 Gjennom samtaler med sentrale norske produsenter og eksportører av klippfisk til det brasilianske markedet vil vi få større forståelse for utfordringene forbundet med framtidig merking av norsk klippfisk til det brasilianske markedet, sett fra norsk ståsted
- 1.2 Samtaler med aktører i brasilianske supermarkedskjeder – slik at vi kan få et innblikk i hvilken erfaring de har med ulike informasjonselementer relatert til salg av klippfiskprodukter.
- 1.3 Gjennomføring av kvalitative undersøkelser (fokusgrupper) for å få større forståelse av hva folk ser etter og hvilke informasjonselementer som er viktige ved valg av klippfisk i butikk. Vi tenker oss like studer gjennomført i de deler av Brasil hvor klippfisk av torsk er et dominerende produkt og de deler av Brasil hvor klippfisk av sei er et viktig produkt.
- 1.4 Gjennomføring av kvantitative undersøkelser (spørreundersøkelse). Eksportutvalget for fisk i Brasil har en database med flere titusen mailadresser. Mailadressene er samlet inn ved at brasilianere som er interessert i klippfisk har meldt seg på. Via denne kanalen distribuerer EFF relevant informasjon/nyhetsbrev. For å kartlegge betydningen av informasjon i kjøpsøyeblikket, framstår en internettbasert undersøkelse mot denne gruppen som meget relevant. Vi har tidligere "luftet" tanken om å bruke denne databasen med EFF og dette er blitt positivt mottatt.

Markedsforskning i andre land er krevende og det vil trolig være nødvendig med noen tilpasninger i forhold til gjennomføringen for å nå de målsetningene som er beskrevet i prosjektbeskrivelsen.

2 Måloppnåelse

2.1 Delmål 1: Intervju med norske eksportører

Denne delen av prosjektet skulle innhente og bearbeide informasjon og synspunkter gitt av norske eksportører på Brasil. På tross av gjentatte forsøk har slike samtaler, bortsett fra med en aktør, ikke latt seg gjennomføre.

2.2 Delmål 2: Intervju med brasilianske importører/distributører

Allerede når søknaden ble, skrevet visste vi at dette var en ambisiøs målsetting. Vi har tidligere erfart at de som jobber med dagligvareomsetningen bare unntaksvis vil stille opp for intervju. Under besøket i Brasil var vi hos en av de store importørene, men da som inviterte på en tilstelning for vedkommendes kunder. Det bød seg dessverre ingen anledning til å snakke med importøren verken før, under eller etter seansen. Vi visste også at representanter for brasilianske supermarkedskjeder jevnlig besøker Norge og sine norske handelspartnere. Gjentatte forsøk på å komme i kontakt med disse representantene mens de var i Norge, bar heller ikke frukt. Vi må bare konstatere at det i dette prosjektet ikke var mulig å få adgang til slike informanter, verken i Brasil eller i Norge.

For å bøte på manglende muligheter til å innfri denne delen av prosjektets måloppnåelse, besluttet vi å gjennomføre en noe mer grundig kartlegging av hvordan supermarkedene profilerer klippfisk samt intervjuer med de ansvarlige i butikken for å kartlegge deres kunnskapsnivå om klippfisk. Dette ble gjort i de samme byene som vi kjørte fokusgrupper samt i Florianopolis. Siden et FHF-prosjekt i pelagisk sektor passet tidsmessig med inneværende prosjekt besluttet vi å inkludere kunnskap om sild/sardiner (se FHF-prosjekt nr 900369). Hele studien ligger som vedlegg 1 til denne rapporten

Intervjuene viser at det er svært sprikende kunnskapsnivå i butikkene. Særlig er mangelen på faktakunnskaper påtagelig. Eksempelvis hevdet flere at fisken kommer fra Norge, men den saltes i Portugal før den sendes til Brasil. Videre hersker det betydelig usikkerhet omkring de egentlige forskjellene mellom ulike typer klippfisk. På mange måter "matcher" de butikkansattes kunnskapsnivå det som kommer fra i fokusgruppene (se under), selv om det fantes hederlige unntak.

Det synes å være enighet om at salget generelt har økt, men det er ikke enighet om hvorfor. Noen henviser til gunstig vekslingskurs, andre til bedre privatøkonomi. Samtidig er man nå mer bevisst på at klippfisk selges gjennom hele året selv om de desiderte salgstoppene fremdeles er jul og påske. Interessant nok var det en som mente at salgssøkningen kunne representere en fare for fiskebestanden!

2.3 Delmål 3: Hva er viktig når brasilianske forbruker velger klippfisk i butikk?

For å kartlegge disse forholdene, har vi gjennomført fokusgrupper i Sao Paulo, Rio de Janeiro, Belo Horizonte, Brasilia, Salvador og Recife. Undersøkelsen ble gjennomført våren 2010. Hele studien ligger som vedlegg til denne rapporten

De viktigste forholdene var knyttet til følgende:

Kvalitet, som vi med bakgrunn i det øvrige som ble sagt, tolker til betyr summen av tykkelse og riktig farge

Stykningsdeler. I Brasil er langt mer av fisken kuttet i biter sammenlignet med Portugal

Farge, tykkelse, tørrhet

Vi har ved selvsyn, og dette bekreftes også av deltagerne i studien, konstatert at produktinformasjonen knyttet til klippfisk er nokså begrenset. Til tider er den også gitt på en måte som er lite meningsfylt. Butikkpersonalets kunnskaper er heller særlig gode. Vi ønsket derfor å kartlegge hva slags informasjon forbrukerne savnet/ønsket seg. Svarene kan summeres opp i følgende punkter:

- Opprinnelse. Hvor kommer klippfisk fra og hvordan blir den laget?
- Forståelse av "holdbarhetsdato" (alle emballerte produkter har dette)
- Hva er forskjellen mellom de ulike typene klippfisk?
- Hva er egentlig bacalhau? Forvirring omkring navn på fisk og produktkategori.
- Klippfiskens helsemessige effekt.

2.4 Delmål 4: Spørreundersøkelse med bruk av EFFs emaildatabase

Denne delen av prosjektet har ikke latt seg realisere innenfor prosjektperioden. Dette skyldes at forrige utsending fra EFF til Brasil ikke fullt ut greide å kartlegge eventuelle uønskede konsekvenser (både praktiske og juridiske) av å bruke EFFs maildatabase til å kjøre spørreundersøkelser. Denne databasen er egentlig bygd opp av adresser til folk som ønsker å motta et nyhetsbrev fra EFF i Brasil og vi har full forståelse for de betenkeligheter som daværende stedlig representant uttrykte. Sommeren 2010 skiftet EFF ut den stedlige representanten og vedkommende som nå er i Brasil mener at å bruke databasen til spørreundersøkelse er uproblematisk. Vi har derfor pushet på for å få dette gjennomført. EFFs representant har ikke hatt tilstrekkelig tid til å gjøre dette i 2010 og dette har vi måttet akseptere. Vi har derfor blitt enige om at det skal kjøres en begrenset spørreundersøkelse i første kvartal 2011 hvor formålet primært vil være å teste teknikken og vurdere antallet og kvaliteten på de svar som kommer inn. Hvis dette viser seg å være tilfredsstillende og vi kan skaffe finansiering, er det håp om at det kan kjøres en større og landsdekkende survey i Brasil i annen halvdel av 2011 og første halvdel 2012.

3 Publisering/Informasjon

Populærvitenskapelige framstillinger

Produksjon og regelverk, nr 3/2010, oktober, årgang 2

Østli, Jens: Merking av klippfisk (bacalhau) i Brasil: Hva er myndighetskrav og hvordan er praksis?

Planlagt artikler til informasjonsheftet som Faggruppe saltfisk og klippfisk skal utgi i 2011

Foredrag

Østli, Jens (2010): Merking av klippfisk i Brasil. Samling i Bacalao Forum, Tromsø 27. oktober.

Ytterligere foredrag vil bli gitt på forespørsel fra koordinator for Faggruppe klippfisk/saltfisk

Vitenskapelige bidrag (spin-off fra tidligere FHF-prosjekter gjort i Brasil)

Guilhoto L.de F. M., C. Xie, K. Grønhaug, **J. Østli** (2010): *An identity approach to prosumption - A case of Bacalhau prosumption in Brazil*. Johan Arndt-konferansen, Hønefoss 7.-8. juni

Xie, C. R. Bagozzi, **J. Østli** (submitted): An Investigation of Food Consumption through the Lenses of Two Social Psychological Theories: Development and Test of Hybrid Models. *European Journal of Marketing*.

Xie, C. L. de Fátima Martins Guilhoto, K.Grønhaug, **J. Østli** (submitted): An identity approach to prosumption: A case of bacalhau prosumption in Brazil. EMAC, Ljubljana, Slovenia. May 24-27, 2011

VEDLEGG 1

Kartlegging av kunnskaper om klippfisk (og sild) i brasiliansk dagligvare: Intervjuer med butikkansatte. Intervjuene er gjort i følgende byer og utsalgssteder:

Belo Horizonte

- Carrefour (supermarked)
- Extra (supermarked)
- Walmart (supermarked)
- Mercado Central (marked)

Brasilia

- Extra (supermarked)
- Walmart (supermarked)
- Mercado Municipal (marked)

Florianopolis

- Mercado Publico (marked)
- Angelioni (supermarked)
- Big (supermarked)

Recife

- Extra (supermarked)
- Bompreco (supermarked)
- Sao Sebastian (marked)
- Soberano (supermarked)

Salvador

- Extra (supermarked)
- Bompreco (supermarked)
- Minipreco (supermarked)
- Sao Joaquim (marked)

Rio de Janeiro

- Casa Pedro (spesialbutikk)
- Extra (supermarked)
- Zona Sul (supermarked)
- Continental (supermarked)
- Walmart (supermarked)

Sao Paolo

- Carrefour (supermarked)
- Mercadao, 4 utsalgssteder (marked)
- Santa Maria (spesialbutikk/emporium)
- Extra (supermarked)
- Pao de Azucar (supermarked)
- Walmart (supermarked)



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Belo Horizonte (Shop 1)





International Chain: Carrefour



We talked to 3 people there: one about bacalhau, a common sales person working in the department of sausage, bacon, etc.. Where bacalhau is and 2 other people from the fishery, who talked about sardinha. There was no specialized sales person there to talk about bacalhau.



1. Types of Existing Bacalhau

- ❖ Saithe (picture 5), do Porto, Porto Morhua, Ling (picture 4), Ling Macro;

2. Differences among them

- ❖ *"Porto is the best, because it comes with less bones"*
- ❖ Prices differentiate a lot among types: Saithe is the cheapest (around R\$ 25/kg or if there is a promotion around R\$ 16/kg). Ling is the second cheapest (around R\$ 29 /kg or R\$ 32 / kg). Porto is the most expensive, *"actually the loin is the most expensive one, only meat comes in it"* (around R\$ 50 - R\$ 60/ kg or if there is a promotion around R\$ 35/kg)

3. Precedence

- ❖ According to the sales person, some of them come from Norway, some others come from other countries

4. Cuts

- ❖ According to the sales person, Bacalhau needs to be cut in the middle, no tips can be left apart, neither tail or little pieces near the head, otherwise they lose it. All these pieces need to be taken;
- ❖ Types of cuts: loin, filet (picture 2, 3 and 7)



5. What people look for the most in the shop

- ❖ People most look for bacalhau divided in the middle and on the trays

6. Consumers Profile

- ❖ Consumers differentiate by social economical class, *"some of them just like Porto and don't even look at the price"*. No gender or age differentiates, according to the sales person.

7. Sales Fluctuation

- ❖ Easter holiday is the one mostly selling bacalhau there, according to the sales person, sales "triples" in that period;
- ❖ *"If you see the gondola now, you only see few bacalhau, in Easter, gondola is 3 times as big as it is now"* (see pictures 1 and 6)

8. Bacalhau Business Development

- ❖ Sales person mentioned this year bacalhau was sold less than the year before, but since he works there Carrefour sells bacalhau, so he does not know about the business development;



9. Barriers / Threats to Bacalhau

- ❖ He thinks bacalhau may have sold less this year in this shop because maybe there was an offer of another fish less expensive in the moment;

10. Place where Bacalhau is in the Shop

- ❖ *"This does not change much, it's always here (near bacon, sausage, etc..). When they improve something, they include some potatoes nearby"* (pictures 2 and 6)

11. Frozen Bacalhau x Disalted Bacalhau

- ❖ *"They sell it 'cold' here"* (near butchery) (but they didn't have it by that time)

12. Fresh Sardinha

- ❖ They only have frozen sardinha in this shop (pictures 10 and 11)



13. Where do Sardinha come from

- ❖ Both people working in the fishery have no idea, they just say it comes from the “salt water” (sea)
- ❖ Supplier is “Frescatto” which is also the brand (www.frescatto.com) (This company is located in Duque de Caxias, Rio de Janeiro) (pictures 10 , 11 and 19)

14. Knowledge of Arenque

- ❖ They have “Sardinha Arenkcon” there, but sales people didn’t even know what they are, they said this is “new” there, they didn’t sell before, it’s the first time they are selling it; no supplier name is on the pack, fish is packed in Carrefour own package;
- ❖ They think, “Sardinha Arenkcon” also come from Rio de Janeiro, but the whole boxes were already thrown away by the market; they mentioned Sardinha Arenkcon is from a different supplier from the other Sardinha, so Frescatto is the supplier of Sardinha, not Arenkcon
- ❖ They don’t know the supplier (boxes were thrown away);
- ❖ They mentioned difference between “Sardinha Arenkcon” and common sardinha is the size (Arenkcon is bigger) and quantity of spines (Arenkcon supposedly have more). (pictures 8, 9, 15, 16 and 17)

15. Where is Sardinha placed in the shop

- ❖ Next to the fishery, in the frozen gondola next to the fishery (pictures 12, 13,14 and 18)



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Belo Horizonte (Shop 2)





National Chain : Extra (Pão de Açúcar Group)



We talked to 2 people: one sales person in the sausage, bacon area where bacalhau was also placed and another person from the fishery (fishery chief man) about sardinha.



1. Types of Existing Bacalhau

❖ Shop didn't have anybody able to talk about bacalhau. The only sales person there available did not know anything, only mentioned they only sell such a "bacalhau type" bacalhau, sold in "chips". Even in the pack, no "type" of bacalhau was mentioned, no names. (pictures 1, 2, 3 and 4)

2. Differences among them

❖ No differences available, since only one existing type was there and no sales person knew about anything.

3. Precedence

❖ No information acquired about it, the only sales person available did know anything about it.

4. Cuts

❖ Only one cut available: in "chips" sold on trays (pictures 1, 2, 3 and 4)



5. What people look for the most in the shop

- ❖ No information available at all, no one to talk to

6. Consumers Profile

- ❖ No information available at all, no one to talk to

7. Sales Fluctuation

- ❖ No information available at all, no one to talk to

8. Bacalhau Business Development

- ❖ No information available at all, no one to talk to



9. Barriers / Threats to Bacalhau

- ❖ No information available at all, no one to talk to

10. Place where Bacalhau is in the Shop

- ❖ Along with sausage, bacon, dried meat and similar (picture 5)
- ❖ Frozen bacalhau is in the freezer along with the other frozen fish

11. Frozen Bacalhau x Disalted Bacalhau

- ❖ They had frozen disalted bacalhau, loin is packaged (picture 8)

12. Fresh Sardinha

- ❖ They had fresch sardinhas in this shop (only “Sardinha Norueguesa” – Norweagean Sardinha)



13. Where does Sardinha come from

- ❖ Sardinha they sold there come from Norway, the one they work with;
- ❖ There are around 7 types of Sardinha, they only work with this fresh one;
- ❖ They don't know the suppliers, fishery man mentioned Extra is the one bringing it, but was not sure of it;
- ❖ They usually have fillet of sardinha, they produce it, they cut it, but didn't have it by the time of the visit;

14. Knowledge of Arenque

- ❖ They sell Sardinha Arenque in Extra (picture 7);
- ❖ They have it either fresh (pictures 13, 14 and 15) or frozen (pictures 9, 10, 11, and 19);
- ❖ According to the fishery man, it comes from Norway, that's why it's also called "Sardinha Norueguesa" (Norweagean Sardinha)

15. Where is Sardinha placed in the shop

- ❖ Fresh sardinha is placed in the fishery, in an ice open gondola along with the other fish (pictures 6 and 12);
- ❖ Frozen arenque (pictures 9, 10 and 11) is placed near the open gondola, but in a closed freezer



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Belo Horizonte (Shop 3)





International Chain : Wall Mart



We talked to only 1 person. There was another person who would know more about bacalhau, this second person was a manager, but he was never available. So, only a sales person talked to us, he didn't know much, though.



1. Types of Existing Bacalhau

- ❖ When asked about bacalhau, sales person only knew the types of cuts: whole piece and shredded
- ❖ However, in the store, they had Porto and Saithe, both packaged on trays (pictures 1, 2, 3 , 4, 12);

2. Differences among them

- ❖ Person didn't know even about names

3. Precedence

- ❖ Bacalhau comes from Norway: "only in Norway we find bacalhau"

4. Cuts

- ❖ Whole piece and shredded on trays available



5. What people look for the most in the shop

- ❖ People prefer shredded bacalhau when available, according to the sales person

6. Consumers Profile

- ❖ Sales person mentioned there was not much difference

7. Sales Fluctuation

- ❖ Easter is the best period of sales, they sell twice as much of the rest of the year;
- ❖ One of the reasons why people mostly eat in the Easter, according to the sales person, is due to the traditional & religion aspect, because people believe they can't eat red meat in Easter period: *"if people could eat meat, they would, they don't like fish that much, they prefer red meat. Fish is like a sacred food, few people use it if compared to red meat"*

8. Bacalhau Business Development

- ❖ According to the sales person, sales of bacalhau has been increasing through the years



9. Barriers / Threats to Bacalhau

- ❖ He thinks people prefer red meat, so fish is the second choice, they eat it much less

10. Place where Bacalhau is in the Shop

- ❖ Along with olive and olive oil (picture 6)
- ❖ Frozen bacalhau is in the freezer along with the other frozen fish in front of the fishery (picture 14)

11. Frozen Bacalhau x Disalted Bacalhau

- ❖ They had frozen disalted bacalhau, loin is packaged (picture 13 and 14)

12. Fresh Sardinha

- ❖ They have fresh sardinha, the type available there is called "Sardinha from Lages"; (picture 8, 10 and 11)
- ❖ They also mention a fish called "Cavalinha" that is similar to Sardinha, but they don't call it sardinha, this fish is available there fresh (picture 9)



13. Where does Sardinha come from

❖ Sales person only says it comes from Brazil: Rio de Janeiro, but since it's sold fresh, not packaged, there was no possibility of seeing the supplier, specially because the containers where sardinha come into the market were already thrown away.

14. Knowledge of Arenque

- ❖ Sales person never heard about it;
- ❖ No availability of Areneque in this store

15. Where is Sardinha placed in the shop

- ❖ In the fishery, inside an ice open gondola (picture 5 and 7)



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Belo Horizonte (Shop 4)





Open Market : Mercado Central



We talked to two people: one is the owner of a stand selling bacalhau and the other works in a fishery selling sardinha. In this market, there are many different bacalhau stands and fisheries.



1. Types of Existing Bacalhau

❖ According to the owner, there are the following types: Porto Macrocephalous, Porto Gadus Morhua, Saithe, Zarbo and Ling

2. Differences among them

- ❖ According to the man, “it’s complicated for the consumer to identify them when they are exposed”;
- ❖ Porto Macrocephalous and Porto Gadus morthua can be identified by the quality. Porto Morhua is the most special one;
- ❖ Bacalhau can be differentiated by type through their color; Saithe is darker and has a heavier flavour;
- ❖ Porto has a more noble and smother meat;
- ❖ All types can be used to all dishes;
- ❖ Thickness of bacalhau does not depend on type, both Saithe and Porto can be similarly thick;
- ❖ Prices do differentiate them too: Saithe is around R\$ 27 / kg (picture 1); Ling and Zarbo are around R\$ 38 / kg; Porto Macrocephalous is around R\$ 50 / kg or R\$ 58 / kg (picture 2, 10) and Porto Morhua is from R\$ 90 / kg to R\$ 110 / kg (picture 7, 8, 9 ,12, 13 and 14);
- ❖ Even for Saithe, they have different prices due to the “size” of bacalhau: bigger and thicker, more expensive (picture 6)



3. Precedence

- ❖ Porto Gadus Morhusa is fished in the Pacific Ocean;
- ❖ Porto Macrocephalous is fished in Norway, in the Northern Sea;
- ❖ All others are also fished in Norway;
- ❖ There are some others coming from Island too, usually Saithe come from there

4. Cuts

- ❖ *"We offer different cuts to catch people's attention";*
- ❖ *"Loin is cut in a way people really sees bacalhau thickness, this is a special cut. People ask for the thickest bacalhau";*
- ❖ Loin is the center part of bacalhau;
- ❖ Cut is not done in a straight line: *"if you cut it in a straight line, it's ugly, so we lay down the knife to cut and offer a different appearance, it's like optical vision, consumers think this way they are having a thicker bacalhau" (pictures 17, 18,19,20)*
- ❖ They also have shredded bacalhau (picture 3, 4 and 11): *"This is usually used to ' Bacalhau à Gomez de Sá' or for salads, so in this case you don't need to take a bacalhau of R\$ 71 / kg if you can take it for R\$ 50 / kg".*
- ❖ They don't offer shredded bacalhau being Zarbo or Ling because their meats, according to the man, is not easy to manipulate, they don't release easily, so they use Saithe or Porto
- ❖ They also have small filet (loin) pieces, all cleaned by them (picture 15)

5. What people look for the most in the shop

- ❖ Saithe is the most consumed due to price;

6. Consumers Profile

- ❖ It basically varies for the income level. A class only buy Porto, they don't want another. Gender and age is not a criteria, it was always like that



7. Sales Fluctuation

- ❖ Bacalhau sales differentiate from the rest of year only in Easter due to religion & tradition;
- ❖ Their sales has its peak in the last 2 weeks of Lent period, it more than doubles (usually end of April)

8. Bacalhau Business Development

- ❖ They are in business for more than 20 years. They believe bacalhau sales is increasing because bacalhau dishes are becoming more and more divulgated. Bacalhau is being more imported today than before;
- ❖ They buy from importers, they are many, the main ones are Brumar and BM

9. Barriers / Threats to Bacalhau

- ❖ The only barrier is price: *"when a consumer analysis a kg of bacalhau, the cheapest costs around R\$ 27, this is a substantial difference for someone earning a minimum salary a month"*

10. Place where Bacalhau is in the Shop

- ❖ Along with olive and olive oil: " we have the olives more exposed and near bacalhau to stimulate people" (picture 5, 16)

11. Frozen Bacalhau x Dissalted Bacalhau

- ❖ They have both frozen & dissalted bacalhau. In this case, "person needs only to unfreeze it, it already comes with only 3% to 5% of salt"

According to the man, dissalting process is done through the thickness of bacalhau. If it is a two-finger thick, it needs 24 hours for dissalting; if it's a three-fingers thick, it needs 36 hours for dissalting



12. Fresh Sardinha

- ❖ In the fishery, there is fresh Sardinha (pictures 34, 36, 43);
- ❖ However, when "sardinha fishing time" is over, they only sell it frozen;
- ❖ Usually fishing time is open for 3 months and then closed for more 3 months;
- ❖ Average size of sardinha is 20 cm;
- ❖ Lower classes usually buy sardinha more than high classes due to price;
- ❖ They also sell sardinha fillet they cut off tail and head and sell it open (picture 39).

Fillet is always stocked frozen (picture 40);

- ❖ Entire sardinha is sold at R\$ 4,99 / kg, fillet is sold at R\$ 11,90 / kg

13. Where does Sardinha come from

- ❖ It comes from Rio de Janeiro, in Brazil (picture 37)

14. Knowledge of Arenque

- ❖ Sales person mentioned it heard of it, but does not know what it is;
- ❖ Sardinha there is bought fresh, they have green standard containers (picture 38 and 41) only with the name of the market, no supplier name on it

15. Where is Sardinha placed in the shop

- ❖ This is already a fishery, they only sell fish. Sardinha is placed in an ice gondola along with the other fish. Sardinha shares gondola with Cavalinha. (picture 41, 44) (picture 35: sardinha on the back and cavalinha on the front. Cavalinha is bigger)



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Brasília (Shop 1)





National Chain : Extra (Pão de Açúcar Group)



We talked to 1 person, he was the fishery chief man and also the one responsible for giving information about bacalhau and all other fish.



1. Types of Existing Bacalhau

- ❖ They didn't have all, but the man mentioned the existence of Porto, Porto Imperial (filet), Saithe and Ling

2. Differences among them

- ❖ Differences are related to "texture" and color according to the man: *"Sometimes people think Saithe is a bad product because it's darker, but it's the best for me"*
- ❖ Porto has a lighter meat;
- ❖ Saithe has a "better" flavor according to the man, stronger
- ❖ *"Porto Imperial is 10!"*

3. Precedence

- ❖ All of them come from Norway, according to the man

4. Cuts

- ❖ Besides shredded salty bacalhau, they have frozen filet (loin with no spines)
- ❖ According to the man, in the moment we visited the store, only that "shredded" bacalhau was available, but this is "bacalhau type" (picture 9, 10, 11 and 13), this is not bacalhau in fact, it's another fish (he didn't recognise the name of fish, but mentioned it was from Norway too). He mentioned desalting process is the same, so flavor will be about the same



5. What people look for the most in the shop

- ❖ People look for the cheapest, but also lighter color bacalhau

6. Consumers Profile

- ❖ Usually women are the one buying, between 27 to 40 years, because they mainly are the ones preparing and looking for learning a new receipt

7. Sales Fluctuation

- ❖ Easter and End of the Year are the two main peak moments for sales. Man mentioned this is the *"period where people mostly eat fish in general due to religion & tradition"*

8. Bacalhau Business Development

Sales triples in those periods: *"what we don't sell all year, we sell it in one week in Easter. In this period, we sell around R\$ 150 thousand of bacalhau. Usually, in a typical month, we sell around R\$ 30 to R\$ 40 thousand only"*

"In this Easter, we lack importing bacalhau. Demand was higher than we expected"



9. Barriers / Threats to Bacalhau

❖ He believes people don't eat more bacalhau due to price: *"due to the fact it's an imported product, its costs become too expensive, unless you are one of the few who plan to eat bacalhau every month, the great majority sometimes change to another fish and do not take bacalhau"*

10. Place where Bacalhau is in the Shop

- ❖ Along with sausage, bacon, dried meat and similar (picture 12)
- ❖ Frozen bacalhau is in the freezer along with the other frozen fish in the fishery

11. Frozen Bacalhau x Desalted Bacalhau

- ❖ They have desalted frozen bacalhau, it's Porto bacalhau (loin with no spines neither salt) (picture 14, 15 and 16)
- ❖ OBS: the man mentioned they once did a degustation of frozen bacalhau because people thought it could lose its flavor if bought already frozen. So, they explained it's only frozen, it does not suffer any dehydration process, that's why it does not lose its original flavor. Degustation was "bacalhoada" within Easter period;
- ❖ They usually offer the frozen bacalhau who the ones are used to prepare it or preparing for the first time



12. Fresh Sardinha

- ❖ They have both fresh “Norweagean Sardinha” (pictures 6 , 7 and 17), that is already smoke
- ❖ They don’t have filet of sardinha already ready, but he offered to prepare to me if I want it
- ❖ They also have “Portuguese Sardinha” (frozen) (picture 1, 2, 3, 4 and 5). According to the man, this one has more spines than the others and it’s much more expensive due to import taxes and quantity bought: *“since we buy around 20 / 30 tons of Norweagen Sardinha, so price for us becomes much lower. We only buy the Portuguese to have a mix of variety and because some people looked for it. Besides, our purchase department people travel around to Norway, Portugal, Chile, etc.. looking for better price & quality. We like to have a differentiated product that our competitors do not have it. But to tell you the truth, I have tasted all and only the Norweagen sardinha really make difference, better taste if compared to the others. But comparing the Portuguese with ours, almost the same in taste, Portuguese has a littler harder meat than ours”*

13. Where does Sardinha come from

- ❖ Sardinha they sell there comes from Norway, it’s called “Norweagean Sardinha”.
- ❖ *“This is an export product. Only Extra works with this one”*
- ❖ According to the man, this sardinha from Norway has a different taste, but it’s prepared like the other (he is used to cook it in a pressure cooker or fried)

14. Knowledge of Arenque

- ❖ They sell Arenque as being the “Norweagen Sardinha”, is written on the tags (picture 17)

15. Where is Sardinha placed in the shop

- ❖ Fresh sardinha is in an ice open gondola (picture 8); frozen sardinha is in a closed freezer both in the fishery department



Bacalhau Shops Brazil

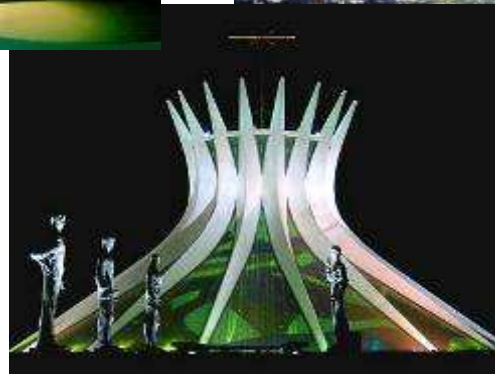


*by AG3 Consulting
May, 2010*





Brasília (Shop 2)





International Chain : Wall Mart



We talked to 1 person, he worked in the salty items department, explained about bacalhau.



1. Types of Existing Bacalhau

❖ They didn't have all, but the man mentioned the existence of Porto, Ling, Saithe and Zarbo. Salted bacalhau available only Saithe type (picture 7, 8, 9).

2. Differences among them

❖ *"Difference among them is a difficult thing"*

❖ *"Saithe is the darkest one, but in the Northeast of Brazil, for example, it's the most sold one due to price, but here people prefer the lighter ones"*

❖ According to his knowledge, there is no fish named "bacalhau", bacalhau is the process of salting of many fish from the North Atlantic ocean. These species of fish are: Gardos Morhua (legitimate Porto type, original from the Atlantic), Macrocephalous (from the Pacific Ocean along with Zarbo and Saithe)

❖ According to him, each type is directed to each type of food, in his opinion, it's "almost a crime" to use Porto to do bacalhau salad, no need to waste it shredding it, better use Saithe for that;

❖ To each of the types, there is another classification: Imperial, Universal and so on, that is the type of bacalhau's healing, not species

3. Precedence

❖ Bacalhau comes from Norway, according to him *"In the beginning, bacalhau used to come from Portugal's port, that's why we all think it comes from Portugal"*

Note: the interviewee recommend me to enter Norwegian Fish Council and Portuguese Council websites to know about types and receipts



4. Cuts

❖ Besides shredded salty bacalhau Saithe type, they have frozen desalted bacalhau cut as “steaks” (Saithe type and Porto Morhua type) and in bigger pieces;

5. What people look for the most in the shop

❖ People look for the lighter one, they think Saithe is not so good here

6. Consumers Profile

❖ Usually women in all ages

7. Sales Fluctuation

❖ Brazil import bacalhau all through the year, but it happens more in Easter

8. Bacalhau Business Development

Consumption of bacalhau has been increasing more and more each day in Brazil, Brazil already imports it all through the year and trend is to increase it



9. Barriers / Threats to Bacalhau

- ❖ Culture & habits, people are not used to eat it too much, but they will more and more
- ❖ Lower habit of eating fish, Brazilians still eat more red meat than fish
- ❖ He doesn't think price is a barrier, it's a matter of culture and lack of knowledge. He mentioned: *"if you buy a red meat, sometimes you have to clean it, so you pay a price for a kg, but you will lose many pieces; if you buy another fish with many spines, still you have to clean it and will lose many meat, so with bacalhau you have more meat, you can take it better, so sometimes you pay more, but you use it more, for many more times"*

10. Place where Bacalhau is in the Shop

- ❖ Salted bacalhau is on a dried stand along with sausage, flour, dried meat, etc... (picture 10, 21)
- ❖ Frozen bacalhau is in the freezer along with the other frozen fish (picture 1, 19, 20, 27)
- ❖ Both are near the fishery

11. Frozen Bacalhau x Desalted Bacalhau

- ❖ They have different brands, cuts and types of desalted frozen bacalhau
- ❖ Brands: Ribeira Alves (picture 13), Frescatto (picture 3, 6, 22), Wall Mart (own brand)
- ❖ Cuts: fillet, loin and steaks (picture 11, 12)
- ❖ Types: Morhua (picture 23) and Saithe (picture 5, 14, 15, 16, 17, 18, 24, 25, 26)



12. Fresh Sardinha

- ❖ They didn't have sardinha

13. Where does Sardinha come from

- ❖ They didn't have sardinha

14. Knowledge of Arenque

- ❖ They didn't have sardinha neither Arenque. Besides, didn't know what it is

15. Where is Sardinha placed in the shop

- ❖ They have a fishery with many fresh fish, but no sardinha available



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Brasília (Shop 3)





Open Market: Mercado Municipal



We talked to 1 person, he is the one cutting bacalhau. He is not a sales person, he works separately from those people, upstairs, cutting and packing bacalhau and also the other fish to be served in the stands.



1. Types of Existing Bacalhau

❖ Gadus Morhua (top of line, also known as “cod” or “Porto Imperial” , according to the interviewee: “*There is only one cod type: Gadus Morhua*”); Gadus Macrocephalous (picture 5 and 30); Ling; Zarbo and Saithe. In this shop, they only have Morhua and Macrocephalous.

2. Differences among them

- ❖ Gadus Morhua is the thickest one;
- ❖ Saithe is the most found in the supermarkets;
- ❖ Saithe, Ling and Zarbo are smaller fish, “*they don’t develop*”, they are “like-bacalhau” type;
- ❖ Difference between Gadus Morhua and Gadus Macrocephalous, according to the respondent, is the “design” inside the meat, these lines, “*which are the meat’s fat*” (picture 33) are a characteristics of Gadus Morhua, because “*when you’re going to prepare it, you can open it like ‘medallions’, its meat is loosen as chips, when you fork it, it breaks softly (picture 34). Gadus Macrocephalous, in turn, has a similar design, but its meat does not loose like that. They are very similar, but Macrocephalous has a fibrous meat while Morhua has a creamy meat*”.
- ❖ He also mentioned “*flavour are identycal between Macrocephalous and Morhua, if they are eaten with no skins, but if you eat with skins, like the Portuguese do, Morhua is better because it loosens more fat, thus more tasty*”. He also commented that all Portuguese prefer buying bacalhau with the skins (they buy the entire bacalhau), different from the Brazilians, because they like to take the fat being loosen from the bacalhau. The Portuguese use the whole pieces of bacalhau and prepare “calderada de bacalhau”: “*The Portuguese do not waste anything, neither spins, only after they suck everything*”
- ❖ Another difference between Morhua and Macrocephalous are the skins: “*Morhua’s skins are more straw-like than Macrocephalous, the skin from the latter is lighter in color*”;
- ❖ The other types Zarbo, Ling and Saithe are darker in color: “*Ling and Zarbo are yellowish and Saithe is almost blueish*”
- ❖ Flavor differs among all types



3. Precedence

- ❖ Both *Gadus Morhua* and *Gadus Macrocephalous* are fished in Norway (where the coldest waters are) and transferred to Portugal for being healed. “*Heal is bathing the fish in the salt and maturation*”;
- ❖ Saithe, Zarbo and Ling are not found in Norway, but in Island and Portugal’s sea;
- ❖ The man mentioned some people think “Porto Imperial” type comes from Portugal, if sales people mention it comes from Norway, some people are apprehensive to buy it.
- ❖ He also mentioned Norweageans eat bacalhau like a common fish here for us, they eat it fresh, Portuguese are the ones who discovered the healing process, they are the ones knowing bacalhau, because bacalhau is not the name of the fish, but the process, that’s why everybody thinks it comes from Portugal.

NORGE Bacalhau da Noruega

DO PORTO DA NORUEGA PARA SUA MESA

Conheça os tipos de Bacalhau da Noruega:

- **BACALHAU COD** (*Gadus morhua*) - Seu corpo tem coloração palha e uniforme, depois de salgado e seco, sua cauda tem a forma de triângulo, de cor cinza e uniforme. Após o cozimento, sua carne se fatia em lascas com facilidade.
- **BACALHAU PACIFICO** (*Gadus macrocephalus*) - Tem coloração mais clara do que o Cod, quando salgado e seco. A parte posterior da cauda tem forma triangular mais arredondada. Sua carne é fibrosa, e que impede uma boa divisão em lascas.
- **PEIXE TIPO BACALHAU SAITHE** (*Gadus aeglefinus*) - Sua coloração é mais escura, depois de salgado e seco, e seu sabor é mais forte e picante. O que mais o diferencia dos outros é a cauda, em forma de V. A consistência da sua carne permite ser dividido em lascas com muita facilidade.
- **PEIXE TIPO BACALHAU LING** (*Molva molva*) - Seu corpo tem forma estreita e alongada, de coloração palha uniforme. A aparência de sua cauda é arredondada e pequena. Não se desmancha em lascas com facilidade, devido à consistência de seu tecido muscular.
- **PEIXE TIPO BACALHAU ZARBO** (*Brosme brosme*) - É o bacalhau de menor tamanho, com coloração palha uniforme. Sua cauda também é arredondada e pequena. Semelhante ao Ling, não se desmancha em lascas com facilidade.

Como o Bacalhau da Noruega um produto quase seco, seu congelamento somente pode ser feito após uma reidratação, mesmo antes. O tempo médio para desalgar e a frequência da troca da água (com cubos de gelo) dependem da altura das postas (ou bordos) do Bacalhau. Mantenha o Bacalhau da Noruega na geladeira durante as trocas. Veja o tempo entre cada troca:

Postas normais - 24 horas	0h	3h	6h	9h	12h	15h	18h	21h
Postas grossas - 40 horas	0h	3h	6h	9h	12h	15h	18h	21h
Postas muito grossas - 60 horas	0h	3h	6h	9h	12h	15h	18h	21h
Bacalhau desfiado - 6 horas	0h	3h	6h					

www.bacalhauadanoruega.com.br





4. Cuts

- ❖ “Main dishes in famous restaurants are done with the center part of bacalhau, the loin, like ‘Bacalhau à Galera’, for example”.
- ❖ “The other parts are not used: rail and edges
- ❖ Some people like to use the skin for doing “bacalhau cream” ;
- ❖ In this shop, they cut bacalhau as “loins” and as “fillet”;
- ❖ The interviewee showed us how he cleans bacalhau for 2 different types of cut: loin and fillet:
 - ✓ Loin (pictures 33 and 36): he took off the fin, he took off the edges (“ears” as Brazilians say) - but he mentioned the ears can be taken, not thrown away; he took off the scales - these parts are sold as “bacalhau chips” separately from the loin; he takes off the skins – easily taken off because it’s a Gadus Morhua type, “skins of all good bacalhau are smoothly taken off entirely (picture 35), with no efforts, it does not break, because this is the ‘real’ bacalhau”; then he takes the spines off and then steaks (loin) are ready and will be put on a tray. From each entire bacalhau, around 3 steaks are taken in order to offer noble pieces. From this 3kg fish, you only take 600 g of loins’ steaks. Loins go 100% without spines. Loin price per kg is R\$ 99,00. This is ideal for preparing “Bacalhau a la Galera” or grilled bacalhau. “The majority of restaurants in Brasília serves the loins, one steak per person”
 - ✓ Fillet (pictures 3, 6, 9, 10, 11 and 29): it’s a different cut from the loin cut. Fillet uses more pieces of the fish, it is less wasted. The cleaning process is the same: fins, edges, scales and skins are taken off (and some will be used for being sold as “bacalhau chips”). Fillet goes 80% without spines. Different from the loin, Fillet is the entire fish, client buys the entire fish cleaned, with no more cuts. Clients are free to do all other cuts they want at home. Fillet price per kg is R\$ 72,90
- ❖ He also gave us a folder from “Bacalhau da Noruega” (Norge) showing names of the fish and types of cuts of the “entire fish”, “which is not useful for our clients here in Brazil, because consumers here do not buy the entire fish, they buy bacalhau already cleaned and cut”, said the man.



5. What people look for the most in the shop

❖ *“The majority of people look for the noble part of bacalhau”, according to the interviewee, “because they don’t like to have any work on it, some people even prefer desalted bacalhau”*

6. Consumers Profile

❖ He mentioned, nowadays, bacalhau consumers have no standard age anymore. The interviewed has a long-term experience with bacalhau in São Paulo and in Brasília.

7. Sales Fluctuation

❖ Quaresma / Easter is the strongest point, followed by Xmas & New Year’s;

❖ In this shop (which is a small one), they sell around 4 tons/month in the common months (May to October) and around 20 tons in Easter and Seasons Greetings’ months;

8. Bacalhau Business Development

❖ This shop is in the Brazilian market for 4 years. According to the man, this year they beat the record of bacalhau sales in Easter: they sold almost 16 tons in only one week, which is a lot of thing for the size of the market and for the size of the city of Brasilia, according to the man;

❖ Along this 4 years, bacalhau sales has been increasing every year, *“maybe because in Brasília, you don’t find bacalhau loin in every market, so people look for us”*, said the man.

❖ The man also mentioned Brazil is disputing to reach the 2nd place in bacalhau consume in the world. “Today, we’re the third, losing for Portugal (1st place) and Island (2nd place), but we’re close to Island and plan to beat them and reach the 2nd place.

❖ The man mentioned last year this shop did an event, a lecture for anyone who would like to come about Bacalhau. They invited some expert from the Brazilian Association of Someliers who knew about bacalhau. They didn’t expect much of the event, didn’t divulgate much, but for their surprise, 150 people showed up, paying for the event. There, they explained about bacalhau, some dishes and degustation. This man used to work at São Paulo Municipal Market and he said what he learned from bacalhau was from Brascod, his supplier (picture 37).



9. Barriers / Threats to Bacalhau

- ❖ He mentioned price is not really a barrier for their shop, probably because the target audience they have as consumers, but since people see bacalhau as a “noble” dish, they save it for special moments, but still there are some types of consumers who are not taken by moments, they eat it more frequently.

10. Place where Bacalhau is in the Shop

- ❖ In the festive moments, they put bacalhau in the front part of the shop near olive oil, they do like a big table with a lot of bacalhau to attract consumers (pictures 38 and 39, taken from their website). In common months, bacalhau is in the back part of the shop along with the salty products like sausages, bacon, mortadella and even smoke sardinha (pictures 1,2, 12, and 22)

11. Frozen Bacalhau x Desalted Bacalhau

- ❖ They offer frozen desalted bacalhau. According to the interviewee, in this way, bacalhau gets less tasty, because it does not go to the healing process, they get it fresh and freeze and send here.” *All desalted bacalhau need to be frozen, because they are fresh*”, the man stated.
- ❖ As for the desalting process, when consumers need to do at home, he pointed to the Norge’s folder (folder 1 and 2) informing about timing for desalting. He also mentioned that some ways of desalting he had heard some people doing with manioc flour, etc.. he states this not work, it’s a lie. He mentioned about a person saying he desalts bacalhau in 5 hours with break crumb, but he mentioned many tests were already done and he guarantees it does not work either. *“All cookers desalt as the traditional way”*
- ❖ The man also mentioned we can buy the trays they sell (not frozen neither desalted) and keep them in the freeze for 6 months, but he advises it’s not really recommended, because one takes the risk of eating a rancid bacalhau. He states it’s better to keep for 6 months the desalted and frozen bacalhau that never went into the salting process or that one that was desalted after bought; but never freeze the salty bacalhau
- ❖ The frozen desalted bacalhau they sold are from Bom Porto’s supplier (import company is BRASCOD), but the interviewee mentioned sometimes some clients ask him to prepare a desalted bacalhau. (pictures: 14, 15, 16, 17, 18, 19, 20 and 21)



12. Fresh Sardinha

- ❖ They only have frozen Portuguese Sardinha (“Sardinha Portuguesa”) (pictures 23, 24 and 25)

13. Where does Sardinha come from

- ❖ They only have frozen Portuguese Sardinha (“Sardinha Portuguesa”), coming from Portugal

14. Knowledge of Arenque

- ❖ They do have Arenque there, but only “smoked Arenque” (pictures 4,7 and 31);
- ❖ Arenque being consumed in Brazil comes from Norway, the man said; but they also have in Island, they eat it fresh, after cleaned;
- ❖ The man mentioned Arenque comes to our country either smoked or in brine like a “sardinha”, but is not a sardinha, according to the man;
- ❖ He mentioned Arenque is sold smoke without cleaning, entirely, because “*many people are fan of its roe, not the fish, it's special like caviar. When fresh arenque is sold, roe is already taken off*”, that's why some people prefer buying it smoked, said the man. When some people buy the smoked arenque and really eat the fish, not the roe, they use for doing salad with chickpea or pate;
- ❖ The man mentioned Portugal also eat arenque a lot, but the fish is from Norway.

15. Where is Sardinha placed in the shop

- ❖ Smoke Arenque is placed placed aside from bacalhau along with the bacon, sausages, etc...
- ❖ Frozen Portuguese Sardinha is within a freezer about bacalhau, but no bacalhau was in there (picture 28)



Bacalhau Shops Brazil



*by AG3 Consulting
April, 2010*





I - Pre-Test

FLORIANÓPOLIS, SC
April 23rd and April 26th



Shop 1 – At “Mercado Público” (Open Market)



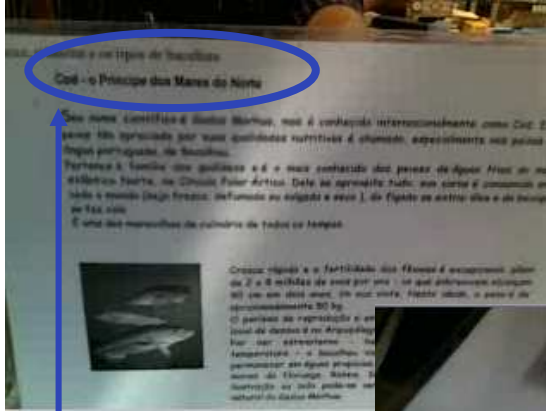
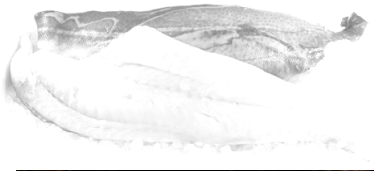
Front picture of the open market



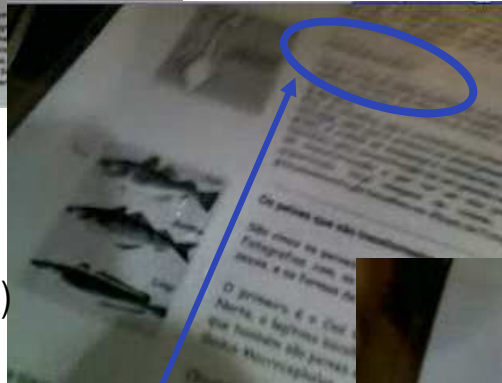
Inside picture of the open market



Picture of the only place inside the open market selling bacalhau called "Alvin Bar"



"Cod – Prince of North Sea" (1st part of his card)



"Bacalhau Fishing" (2nd part of his card)



"Fish Transformed into Bacalhau" (3rd part of his card)

The owner of Alvin Bar has a card with explanation of types of bacalhau. When we asked about bacalhau, he was very kind and open, offering me to read the explanation of bacalhau he had. He shows that to clients and people asking for bacalhau information. He "promotes" cod type, the only type he sells there due to quality, according to his opinion. But explains the other Saithe and Ling type, while pointing onto them. In the paper, they mentioned bacalhau has Norwegians precedence.

Alvin Bar Owner





- According to Alvin Bar's owner, all the three types of bacalhau (Cod, Saithe and Ling) come from Norway, but from different region.
- He only sells cod in 50 years working there, because he believes it's the best, because he believes some types of bacalhau when cut come up as "flakes", which is the case of cod type, and other types like saithe, they come as "chips" or "minced meat" when cut.
- He commented about cod that *"this type of bacalhau, nobody needs to know how to do it, it is already good, so it prepares itself alone"*



- Regarding soak and desalt, one has to do it 24 hours before serving. First, bacalhau has to be washed in a good way and after that included into a basin with ice for being soak to desalt. Water has to be chanced sometimes, but ice needs to be kept there.
- Regarding precedence, he mentioned bacalhau come from Norway, but it is mostly prepared by the Portuguese. All types come from Norway, depending on the region.
- Regarding cuts, he mentioned he takes the sides and tail off only leaving the center. This is the best part of bacalhau, according to his opinion.



In this market, there are many fish stands, many of them sell sardinha, but only Alvin Bar sell bacalhau. Sardinha is very cheap here. If it's sold entirely (only with the head off), kg varies from R\$ 4.50 to R\$ 5.00 or by its "fillet", where they open the sardinhas, then kg is R\$ 7.

When asked about "arenque", none of the 3 stands visited knew it, except for 1 guy that mentioned he had heard of it but only through books.

Entire Sardinha



Sardinha Fillet





Shop 2 – At “Angeloni Supermarket” (National Chain)





General view of the supermarket (outside)





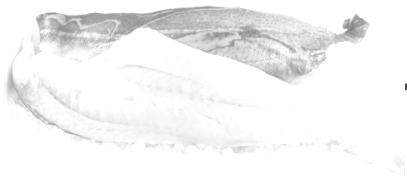
General view of shelving where all bacalhau from Angeloni is placed. All bacalhau is sold on trays, only trays.





Topics Mentioned by Adriano, Chief of Fishery at Angeloni

- ❖ According to his explanations, there are 4 types of bacalhau: Porto, Porto Cod, Ling and Zarbo. All of them are from the same species, but distinct;
- ❖ Porto Morhua type is the most expensive one, because it's the thickest too, it has more beef than spines;
- ❖ Spontaneously, he mentioned that all of them come from the same place, Norway, since he believes "*bacalhau's base is Norway. Norway is the biggest bacalhau producer in the world and its bacalhau is considered to be the best*";
- ❖ The man also stated the different types of bacalhau come from different regions in Norway, that's why they are of different types;
- ❖ His clients in the supermarket are more constantly looking for "*doing the most sophisticated dishes*", like medallion to olive oil, thus, they look for cuts with less spines and more beef. That's the reason why the supermarket offers clients the possibility of buying those types of cuts already done (pictures next page);
- ❖ In the past, people used to buy only in pieces, because "*special cuts hadn't been developed yet, like it's done today, specially to each dish*".
- ❖ Special cuts are: loin, shredded, medallion and strips (pictures on the next page). Traditional cut is "*fish the way it comes naturally, it's just cut to fit the tray*" (fish sides/ thin sides, skin and central saws are not taken off);
- ❖ Regarding soaking, he mentioned one needs 24 hours before the day bacalhau will be prepared to desalt it by doing 4 to 5 water changes while bacalhau is soaked into a pot of water; this process is done independently of type of bacalhau;
- ❖ Price is decided due to the scale of quality of bacalhau in this order: 1. Porto Morhua; 2. Porto Cod; 3. Ling; 4. Zarbo



Different types of “special” cuts:

Shredded

Loin
(fish sides/ thin sides, skin and
central saws are taken off)



Strips



Medallion





Shop 3 – At “BIG Supermarket, Wal Mart” (International Chain)





General View Inside the Shop Where Bacalhau is Sold



In this shop, bacalhau is also sold on trays and bacalhau is sold along with olive oil bottles and olives pots.



In this shop, according to an experient employee in the fishery, they offer 5 types of bacalhau: Porto, Porto Cod, Zarbo, Ling and Saithe, they are distinguishable by their coloration and size. They all come from Norway, each one in one region of the country.



Zarbo

According to the employee, **Zarbo** is to be prepared in a dinner with wine. It's a smoother bacalhau, whiter in its color. Along with Porto, Zarbo come from Norway in a region near Portugal.



Ling

According to the employee, **Ling** is a “stronger” and more salty bacalhau, with darker meat inside, but it has less meat than the others, it's thinner.



Porto

Along with Porto, Zarbo come from Norway in a region near Portugal. According to our source, Porto type is from Norway, but is desalted in Portugal, that's why it's called “Porto”, but it does not mean it comes from Porto.

Saithe is the most inferior bacalhau of all. In the end, according to the employee, Saithe is not even bacalhau, “*they only say it's bacalhau because it's gotton in Norway like the others and desalted in Portugal*”.





- According to the employee, they offer those different cuts to meet clients' need. People prefer to have bacalhau in small portions, but also buy cuts already ready to the specific dishes they will do. For example, "lombo" has no spines, shredded is sold to ones that want to cook fried bacalhau balls, and medallions ("butterfly cut") are to specific dishes, like decorative dishes. They sell the "belly" of bacalhau too, but lombo is the thicker part, the center.
- He says there are different kinds of clients: some looking for price and strong taste, they go for Ling, if they look for a dinner with wine at night, they go for Zarbo, but if they want to "satisfy everyone", they go for Porto. Even though Porto is the most expensive type, clients mostly look for this one.
- Regarding price, there is a specific scale in this order: Porto Special, Porto Cod, Zarbo, Ling and Saithe. There are 5 prices. And from all of them, many cuts can be done.
- According to the employee, desalting process happens according to each one's taste. They even sell frozen bacalhau, already desalted. Desalting process involves cooking and boiling of bacalhau from one day to the other as many times as your salty taste prefer. For Ling, people usually use olive oil because it has a very strong taste.

Lombo Porto



Medallion Porto



Shredded Porto





Kg Price of Ling



Kg Price of Porto



Kg Price of Saithe



In this market, they also offer fresh “sardinha” for sale, “cleaned” sardinha, that means, with no tail neither head. Kg price is R\$ 4.48. No knowledge of “aranque” either.





Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Recife (Shop 1)





National Chain : Extra (Pão de Açúcar Group)



We talked to 1 man, a sales person working in the salty items and fishery. He didn't have a high profile for answering good questions neither knew much of bacalhau, but he was the only person available by the time of our visit.



1. Types of Existing Bacalhau

- ❖ Saithe, Ling and Porto (pictures 1, 2,10)
- ❖ They only had Porto and Saithe

2. Differences among them

- ❖ Sales person had a limited knowledge about it, he didn't know the differences;
- ❖ When asked about the differences in types, he mentioned the differences between salty bacalhau and frozen desalted: *"salty can be used to much more types os dishes and it takes longer to get spoiled while the frozen one can basically be used to dishes to be done in the oven"*

3. Precedence

- ❖ *"I'm not sure from which country it comes from, but I believe they come from Europe"*, that what the man said

4. Cuts

- ❖ There are shredded bacalhau (pictures 3 and 4), stakes, entire and "piece" (pictures 5, 7 and 8). According to the interviewee, *"each type of cut is used to a different dish: shredded for salads, stakes for frying and "piece" for more sophisticated dishes to be done in the oven"*,



5. What people look for the most in the shop

❖ *“People look for the cuts, because they come here knowing which dish they will do, so they look for the cut specifically adequate for their dishes”, mentioned the man*

6. Consumers Profile

❖ Women from 40 years-old on are the ones mostly looking for buying bacalhau in this shop, according to the interviewee

7. Sales Fluctuation

❖ Easter is by far the greatest volume of their sale, *“due to the tradition of eating fish and bacalhau offers the possibility of a great variety of dishes”,* said the man.

8. Bacalhau Business Development

❖ He is just a sales person there, not working so much time in this shop and very limited to answer this question, after we asked him again to think about it, he just mentioned he really didn't know it

9. Barriers / Threats to Bacalhau

❖ He is just a sales person there, not working so much time in this shop and very limited to answer this question, after we asked him again to think about it, he just mentioned he really didn't know it



10. Place where Bacalhau is in the Shop

- ❖ Salty bacalhau is on two tables: one for Porto Imperial in entirety and in pieces on trays (pictures 6 and 9) with a great sign mentioning its name & price and another table with shredded bacalhau also on trays (picture 17). Tables are in the middle of the market, among the fishery and salty items;
- ❖ Frozen bacalhau is inside a closed freezer along with all other frozen fish, near the fishery

11. Frozen Bacalhau x Disalted Bacalhau

- ❖ They offer both;
- ❖ Brands: Bom Porto and Ribeira Alves (pictures 2, 11 and 12)
- ❖ They also have frozen Saithe stakes packed in their own pack, no brand (pictures 13 and 14)

12. Fresh Sardinha

- ❖ They have fresh Sardinha, “Norwegian Sardinha” (pictures 18, 19, 20 and 21)

13. Where does Sardinha come from

- ❖ “*From Norway, from cold water countries*”, mentioned the man (he couldn’t open the boxes to see the supplier because they were already thrown away by the shop)

14. Knowledge of Arenque

- ❖ The man mentioned he doesn’t know it, “*I only know it’s a fish*”, but didn’t notice this shop sells frozen “Arenque” (it seems the terms is unfamiliar for them)

15. Where is Sardinha placed in the shop

- ❖ Fresh sardinha is placed in an ice open gondola while frozen arenque (pictures 15, 16) is in a closed freezer along with other frozen fish, including frozen bacalhau



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Recife (Shop 2)





International Chain: Bom Preço (from Wall Mart Group)



We talked to 1 sales person, he didn't know much, but he was the only person available.



1. Types of Existing Bacalhau

- ❖ Zarbo, Porto, Ling and Saithe. They had only Saithe for sale (pictures 3 and 6)

2. Differences among them

- ❖ Difference is in their color, Saithe and Ling are darker, in this order, while Porto and Zarbo are whiter, in this order, according to the interviewee.
- ❖ *“Color also interferes in the taste of bacalhau”*, added the man

3. Precedence

- ❖ All of them come from the Norwegian sea, according to the interviewee

4. Cuts

- ❖ Loin, shredded (pictures 1, 2, 5 and 7) and steaks. Each one is for a different dish, said the man

5. What people look for the most in the shop

- ❖ People look for types of cuts, because they have their dishes in mind

6. Consumers Profile

- ❖ Men and Women in the same proportion, usually above 25 years-old, in the man’s opinion

7. Sales Fluctuation

- ❖ Easter is the when the greatest volume of sales happens due to the tradition of eating fish in this period



8. Bacalhau Business Development

- ❖ The sales person only mentioned about bacalhau profitability, he mentioned its profitability is very high if compared to other fish

9. Barriers / Threats to Bacalhau

- ❖ The sales person could only evaluate the threats of bacalhau inside the shop: *“Here, we have a ‘fake’ clients coming here only steal bacalhau from our shop, they enter only to steal us”*

10. Place where Bacalhau is in the Shop

- ❖ Salty is along with the smoked items while the desalted fresh, when available (picture 8, 9, 11 and 12), is in the ice open gondola along with the other fresh fish (pictures 10 and 13)

11. Frozen Bacalhau x Desalted Bacalhau

- ❖ They have desalted and salty, but didn't have desalted by the moment of our visit

12. Fresh Sardinha

- ❖ They do have it, entire sardinha, they don't have fillet neither make them

13. Where does Sardinha come from

- ❖ Man mentioned he didn't know it and couldn't find the boxes where they came in

14. Knowledge of Arenque

- ❖ He never heard of it

15. Where is Sardinha placed in the shop

- ❖ In the ice open gondola along with the other fresh fish (pictures 14 and 15)



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Recife (Shop 3)





Open Market: São Sebastião

We talked to 1 person, who seemed to be an employee who had very limited information to offer. This is a small local open market in a neighborhood. In Recife, they don't have big open market like Belo Horizonte or São Paulo.



1. Types of Existing Bacalhau

❖ Very limited information about it: the interviewee mentioned as type “frozen” and “salty” bacalhau. They only sell salty, on trays. On the pack, it says “Bacalhau Norge” (picture 3). No name type of bacalhau is written on the pack (picture 2).

2. Differences among them

❖ Salty does not spoil easily due to the salt, but the frozen one spoils very easily, “*when you unfreeze it, you need to cook it right away*”, said the interviewee

3. Precedence

❖ Person mentioned he had no idea about it

4. Cuts

❖ Shredded, steaks and “piece”. They only had “piece”. “*Each one is for a different dish*”

5. What people look for the most in the shop

❖ “*Our clients look for price*”, he mentioned

6. Consumers Profile

❖ The ones mostly going there to buy bacalhau in this shop are housewives between 40 to 50 years-old.

7. Sales Fluctuation

❖ Easter is the greatest moment of selling bacalhau, he believes “*only because people are a lot used to eat bacalhau in this period*”



8. Bacalhau Business Development

- ❖ He thinks through these years, people are only used to buy it in Easter, it has not been changing a lot

9. Barriers / Threats to Bacalhau

- ❖ Only price, he mentioned

10. Place where Bacalhau is in the Shop

- ❖ Salty bacalhau is in a box, near the smoked items (pictures 1, 4 and 5).

11. Frozen Bacalhau x Desalted Bacalhau

- ❖ They don't sell it

12. Fresh Sardinha

- ❖ They don't sell it, only canned sardinha

13. Where does Sardinha come from

- ❖ He has no idea of where fresh sardinha come from, specially because they don't sell it

14. Knowledge of Arenque

- ❖ He had never heard of it

15. Where is Sardinha placed in the shop

- ❖ They don't sell it, only canned sardinha



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Recife (Shop 4)





Local Regional Chain: Soberano

We talked to one person, a sales person, very limited information gotten from him. He was the only person available in the moment of our visit.



1. Types of Existing Bacalhau

- ❖ He only mentioned salted bacalhau, that he called “fresh” and frozen. No knowledge about types, however, they had Saithe (picture 6, 10, 12) and Porto

2. Differences among them

- ❖ Again, he only knew the differences between “fresh” and frozen, saying that fresh last much longer while frozen need to be consumed right after being unfrozen, otherwise it spoils quickly

3. Precedence

- ❖ He mentioned that “the original bacalhau comes from Norway, but the other types, I don’t know”, however, he couldn’t explain which is the original one.

4. Cuts

- ❖ Steaks (picture 17), piece and shredded.

5. What people look for the most in the shop

- ❖ Price, “*they always take the cheapest*”, he said

6. Consumers Profile

- ❖ Housewives from 40 years-old on

7. Sales Fluctuation

- ❖ Easter is when they sell the most “*because everybody wants to eat bacalhau in this period, because it’s a more expensive and more sophisticated bacalhau, besides, you can do many dishes with it*”, he said.



8. Bacalhau Business Development

- ❖ He was just a humble sales person, we can't expect much of his thinking, didn't know how to answer

9. Barriers / Threats to Bacalhau

- ❖ He was just a humble sales person, we can't expect much of his thinking, didn't know how to answer

10. Place where Bacalhau is in the Shop

- ❖ Salty bacalhau is on a balcony with the smoked items, near the cold items section (pictures 2, 7, 13 and 15).
Frozen bacalhau is in a freezer with other frozen fish (pictures 1, 4 and 16)

11. Frozen Bacalhau x Desalted Bacalhau

- ❖ They have it, they are steaks of fillet of Porto (pictures 3 and 5)

12. Fresh Sardinha

- ❖ They only have frozen sardinha, they are the entire fish on trays (picture 8 and 9), they don't sell neither prepare any fillet

13. Where does Sardinha come from

- ❖ He has no idea, they didn't have any boxes from suppliers there

14. Knowledge of Arenque

- ❖ He had never heard about it

15. Where is Sardinha placed in the shop

- ❖ In the freezer, along with all other frozen fish, including bacalhau (picture 11 and 14)



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Salvador (Shop 1)





National Chain : Extra (Pão de Açúcar Group)



We talked to 2 sales people, they were interviewed at the same time, one complemented the information from the other. Both worked in the fishery and salty items departments.



1. Types of Existing Bacalhau

❖ “There are many species of bacalhau, but we work here with Saithe and the bacalhau from Norway”, said the interviewees

2. Differences among them

- ❖ Saithe (pictures 1 and 2) is a “second-hand” bacalhau while bacalhau from Norway which is a more “tasteful” bacalhau, according to the respondents;
- ❖ Bacalhau from Norway is also thicker, directed to a more “sophisticated” dish;
- ❖ For the men, the main difference between them is the meat: thickness basically

3. Precedence

- ❖ Their origin is Norway, from cold water

4. Cuts

❖ Cuts they knew: Fillet, chips (picture 3) and steak: “they are done to different dishes due to the variety of the culinary”, according to one of the men.



5. What people look for the most in the shop

- ❖ In this store, people look for “quality” in bacalhau, that means, thicker pieces. Price is a second choice

6. Consumers Profile

- ❖ No standard profile anymore, since bacalhau is now more “popular”, everybody buys it

7. Sales Fluctuation

- ❖ Easter is the peak sales moment, followed by Xmas & New Years, aside from that period, people usually look for bacalhau in the weekends to serve in the family lunch on Sundays, other commemorations too, but the volume is not the same sold in Easter

8. Bacalhau Business Development

- ❖ Bacalhau consumption has been increasing. In the past, only rich people could eat it, but nowadays, due to a more accessible price if compared to the past, “*almost everyone can eat bacalhau*”, said one of the men, “*because there is a variety of prices and cuts*” to reach different “pockets”. This scenario has been increasing even in moments not like Easter or Seasons Greetings.



9. Barriers / Threats to Bacalhau

❖ The interviewees believe currency exchange is the main barrier due to the fact bacalhau is imported. He mentioned: “*when dollar rate is high, bacalhau becomes more expensive*”, so currency fluctuation impacts on bacalhau consumption.

10. Place where Bacalhau is in the Shop

- ❖ Salty bacalhau is along with sausages (pictures 4 and 5);
- ❖ Frozen bacalhau is along with all other frozen fish in a freezer near the fishery (pictures 8 and 12)

11. Frozen Bacalhau x Disalted Bacalhau

- ❖ They do sell frozen bacalhau, they are also disalted: loins and steaks;
- ❖ Brand is “Bom Porto”, company supplier is Brascod (pictures 9, 10 and 11)



12. Fresh Sardinha

- ❖ They only had frozen sardinha (pictures 6 and 7);
- ❖ They also sell sardinha's fillet, but it's not prepared by them, it comes industrialized, but they didn't have byt the moment of our visit;
- ❖ Their main sardinha suppliers: Netuno and Lusomar,

13. Where does Sardinha come from

- ❖ They mentioned Sardinha comes from the State of Santa Catarina, in Brazil

14. Knowledge of Arenque

- ❖ *"Arenque is a type of sardinha"*, mentioned one the respondent, *"it's from the same family species and inhabit places with similar conditions of sardinha"*.
- ❖ Flavor is also similar, according to him

15. Where is Sardinha placed in the shop

- ❖ Since they only had frozen sardinha, it was placed in a freezer along with all other frozen fish, including bacalhau, near the fishery (pictures 8 and 12).



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Salvador (Shop 2)





International Chain: Bom Preço (from Wall Mart Group)



We talked to 2 sales people: one from the salty items, who talked about bacalhau, and another one from the fishery department, who talked about sardinha.



1. Types of Existing Bacalhau

- ❖ Porto (picture 4), Zarbo, Saithe (picture 1), Ling and Cod
- ❖ Zarbo is not sold in Salvador (according to the interviewee), because “*Salvador consumers are not used to consume this type of bacalhau*”

2. Differences among them

- ❖ Porto has a whiter and fleshy meat;
- ❖ The greatest volume they sell is from Saithe. Saithe has a darker meat and is smaller than Porto in size, but offers much more competitive price than Porto;
- ❖ Ling is between Porto and Saithe. Ling’s meat has a yellowish color and is longer in size. Its price is more expensive than Saithe, but does not reach Porto’s.

3. Precedence

- ❖ “*All bacalhau we receive in Brazil comes from Norway*”, mentioned the man, “*all types*”, he added.
- ❖ He mentioned Spain, Portugal and New Zealand also are other countries supplying bacalhau worldwide, but they do not supply Brazil

4. Cuts

- ❖ Bacalhau fillet and steaks are done from Porto type. From Porto’s edges, they do shredded (pictures 2 and 3) “*Porto’s bacalhau*”;
- ❖ Saithe is usually sold in bigger pieces, they put on B3 trays “*to better show the product to consumers*”, according to the man;
- ❖ Ling is done with a straight cut, put on a straight tray and show some steaks too



5. What people look for the most in the shop

- ❖ According to the respondent, *“the majority of people come looking for good price”*

6. Consumers Profile

- ❖ A Class people look for Porto while the others go for Saithe, the latter is much more sold

7. Sales Fluctuation

- ❖ The greatest volume of sales is Easter and Season Greetings.
- ❖ Even though the most “expressive” agenda for bacalhau sales are Easter and Season Greetings, still in the rest of the year they can keep with an exclusive table for bacalhau in their shop, since people are eating bacalhau more and more in other moments too.

8. Bacalhau Business Development

- ❖ *“It seems like people from Bahia are including bacalhau in their menu more and more”,* mentioned the man, so consumption is increasing and we stimulate them by the different cuts, *“they end up being visually enchanted by the cuts and buy it”,* he commented



9. Barriers / Threats to Bacalhau

❖ “Since bacalhau is fished in the cold waters of the Atlantic Ocean, its fishery needs some careful procedures, so depending on how you fish it, you can’t take it for consumption, so some of them are wasted”, mentioned the man, “if any thud is done to bacalhau, it will not be used, or if they shake too much, thei blood end up entering the meat and meat color can change, they go out of the standard and makes them difficult to be consumed, that’s why bacalhau’s fishery is done in the traditional way, using hook, not to attack its meat”, he added.

10. Place where Bacalhau is in the Shop

- ❖ Near salty items: sausages, dried red meat, etc..(picture 5)
- ❖ Frozen is inside a freezer with the other frozen fish in the fishery (pictures 8 and 13)

11. Frozen Bacalhau x Disalted Bacalhau

- ❖ They do sell frozen dissalted bacalhau (pictures 9, 10, 11 and 12);
- ❖ They are usually sold in steaks, fillet (from Porto) and loins as well as also piece of Saithe;
- ❖ They also sell what they called “combinado” (combinated), which is bacalhau with some other ingredients for “bacalhoada”: broccoli, capers, etc.. It’s the frozen complete set for bacalhoada (they didn’t have it in the moment, though”



12. Fresh Sardinha

❖ They offer both fresh and frozen (pictures 6 and 7), but he mentioned they receive all of them frozen, they input them in an “unfreezing chamber”, then serve in those open ice gondola (pictures 14 and 15)

13. Where does Sardinha come from

- ❖ Sardinha they sell come from Recife (Pernambuco), called “Gageiro”, it comes already cleaned (with no head neither tail neither viscus);
- ❖ The entire sardinha come from Leão Peças, their local supplier from Bahia;
- ❖ They only sell sardinha by its spawning period, when they are not in this period, they just don’t have the product for selling;
- ❖ They don’t have fillet of sardinha

14. Knowledge of Arenque

- ❖ They only heard of it, but don’t know about it;
- ❖ They don’t sell it.

15. Where is Sardinha placed in the shop

❖ Fresh one is in an open ice gondola (picture 16 and 17) and frozen sardinha inside a closed freezer along with the other fish (pictures 8 and 13)



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Salvador (Shop 3)





National Regional Chain: Mini Preço



We talked to 1 person, a sales person. This is a small local chain, so there are not many people working there neither a variety of products, including bacalhau.



1. Types of Existing Bacalhau

- ❖ The man only knew bacalhau by size: 16cm x 20cm; 21cm x 30cm;
- ❖ All of them are Saithe (they only sell Saithe)
- ❖ They only had 16cm x 20cm in the day of the visit (pictures 1 and 2)

2. Differences among them

- ❖ He only knows that 21cm x 30cm is thicker than 16cm x 20cm;

3. Precedence

- ❖ 95% of all bacalhau come from Norway, according to the interviewee;
- ❖ Their suppliers are: Araújo Mateu and Master Frio

4. Cuts

- ❖ He only knew the “common cut” (pictures 1, 2 and 3) and shredded, but they didn’t have the shredded one

5. What people look for the most in the shop

- ❖ Clients look for price and thickness of bacalhau, according to the man

6. Consumers Profile

- ❖ He mentioned there is no specif profile, everybody buys it



7. Sales Fluctuation

- ❖ Easter is their sales peak

8. Bacalhau Business Development

- ❖ The man mentioned “*tradition is getting more and more into people’s lives, even in non-festive moments, volume of sales of bacalhau has been increasing*”, “*bacalhau is now a fish for everyday, we sell it everyday*”, he added.

9. Barriers / Threats to Bacalhau

- ❖ “*The fact bacalhau is imported, price becomes higher than a common fish*”, according to the man’s opinion

10. Place where Bacalhau is in the Shop

- ❖ Near dried meat, bacon, mortadella, etc... Bacalhau as well as some other meat are hung above some trays packed with items for “*feijoada*” (Brazilian dish with black beans) (pictures 3, 4 and 5)

11. Frozen Bacalhau x Disalted Bacalhau

- ❖ They don’t sell frozen neither disalted bacalhau



12. Fresh Sardinha

- ❖ They sell fresh sardinha (pictures 6 and 7)
- ❖ They also sell fillet of sardinha, they don't make, it comes already packed, but they didn't have it this time

13. Where does Sardinha come from

- ❖ From Santa Catarina, Brazil, according to him
- ❖ Their suppliers are: Master Frio and Polonorte

14. Knowledge of Arenque

- ❖ He had never heard of it
- ❖ They don't sell it

15. Where is Sardinha placed in the shop

- ❖ Inside a freezer (picture 8)



Bacalhau Shops Brazil



*by AG3 Consulting
May, 2010*





Salvador (Shop 4)





Open Market: São Joaquim



We talked to 2 women, both of them working in the stand, one of them seem to be the owner. Both have very poor knowledge of bacalhau and limited ability to evaluate and understand the questions.



1. Types of Existing Bacalhau

- ❖ They mentioned there are different types of bacalhau, but she only knows Saithe, they only sell Saithe (picture 1 and 6)

2. Differences among them

- ❖ They didn't know the differences, she had any knowledge about it at all

3. Precedence

- ❖ It comes from Norway, their supplier / distributor is Centro Sul

4. Cuts

- ❖ They mentioned she only knows this one they do, "*cutting bacalhau in the middle*", commented one of the women

5. What people look for the most in the shop

- ❖ People look for "quality", that means thickness. After quality, they look for price, but according to one the respondents, "*It's not worthy to buy the cheaper one, because when you put in the pan to cook, it breaks too much*"

6. Consumers Profile

- ❖ They had a limited ability to evaluate that, but she thinks there is no specific profile

7. Sales Fluctuation

- ❖ Easter is when they mostly sell it, followed by Christmas



8. Bacalhau Business Development

- ❖ One of the woman mentioned she thinks bacalhau consumption has been increasing, even in non-festive moments, but doesn't know much how to explain why

9. Barriers / Threats to Bacalhau

- ❖ No ability at all to evaluate it, this is a poor market

10. Place where Bacalhau is in the Shop

- ❖ Inside this open market, there are many different stands, each one selling different items. This stand is specialized only in salty items, like sausages, bacon, dried meat, usually sold in bulks; (picture 4)
- ❖ In the stand, bacalhau is placed in two small boxes right in front of the door of the stand (picture 2 and 3), people have to see it for entering;
- ❖ One of the boxes are from Norge, "Bacalhau da Noruega" (picture 5)

11. Frozen Bacalhau x Disalted Bacalhau

- ❖ They don't sell it

They don't sell Sardinha, none of the questions about it was done



RIO CASA PEDRO PART 1

Geisa:- Friend, tell me one thing, what is the difference among these 3 bacalhau?

Sales person: - Here is the special bacalhau, the thick top one, R\$ 23,80.

Geisa:- Why is it special? If I'll buy bacalhau, how can I know how to purchase it?

Sales person: - It is different from the others, can you see it? I has some "leaves" inside, it's easier to shred.

Geisa:- Is this Imperial? Is it different?

Sales person: - Smaller.

Geisa:- Because price is very different....

Sales person: - It is smaller, check its size.

Geisa:- There are 2 Imperial...

Sales person: - This one is the thick one, this one is the special, look at its size, easier to prepare.

Geisa:- And where does bacalhau come from, do you know it?

Sales person: - I comes from Norway..

Geisa:- And how is bacalhau Sales? Are there some periods in the year where it its mostly sold?

Sales person: - Yes, Christmas and New Years, we sell more. Now it's cheap, in around 1 month or so, it will increase.

Geisa:- What is the difference, then?

Sales person: - I don't know how to explain, but sometimes it increases around R\$ 10 or R\$ 20.

Geisa:- Does it increase due to those periods?

Sales person: - Right.

Geisa:- I see, and are there only those types of bacalhau or are there any others?

Sales person: - No, there are some other types, but we only have those.

Geisa:- Qual seriam todos, são mais baratos, mais caros?

Sales person: - There are some cheaper ones, other more expensive ones, but I don't know their names really, I believe one is Saithe.

Geisa:- And what about this "Mulato Velho"?



Sales person: - Mulato velho is a fish, bagre.

Geisa:- So there's nothing to do with bacalhau?

Sales person: - No, no.

Geisa:- And is there a specific profile of consumers Who buy more bacalhau than other things? Who are them? Who are these people usually buying it?

Sales person: - People preparing parties.

Geisa:- There is no specific ages? More old women, maybe...?

Sales person: - No specific age.

Geisa:- And that one there... how much does it weight?

Sales person: - 1kg and 300g.

Geisa:- Can I take a Picture of it too?

Geisa:- Do you sell any other type of bacalhau not being exposed? Maybe frozen ones? Or desalted? Or the only ones you sell are these?

Sales person: - Yes, only these.

Geisa:- Earlier, I called here and they told me there is a woman, probably representant from bacalhau?

Sales person: - It's a lady, she is out there, it's her lunch time.

PART 2

Geisa:- Good afternoon, ma'am, they told me you are the one understanding about bacalhau? They told me you are the specialist here. They gave me those folders.

Dona Vera: - They are some different receipts, but what else would you like to know about bacalhau?

Geisa:- I would like to know about types of bacalhau.

Dona Vera: - Look, behind the receipts, they already give you an answer.

Geisa:- How do I know by the time of choosing a bacalhau for preparing a dish which is the Best?

Dona Vera: - Well, Cod Gadus, this one here and Imperial... but let me explain to you how this really goes, its' scientific name is Cod Gadus, and there are other types we here in Casa Pedro don't sell, but they exist, Saithe type, it's dark, good for fried balls (bolinhos), pies, here, there is an example of this cake and strogonoff also can be done with Saithe or Ling or Zarbo, when you desalt them, you don't boil bacalhau, it



can't be boiled, none of them can. When you desalt it, Saithe itself, the dark one, becomes whiter, pies are preferentially done with this type of bacalhau because it has an intensive taste

Geisa:- And when shall I choose fillets?

Dona Vera: - When you will prepare a big plate, like they do in restaurants, because this is a thick cut, look, besides, there is another macrocephalous similar to Cod Gadus, it's a relative, I'd say brother of this one here, but this one here is the legitimate one, it doesn't mean the other is not legitimate, but preference here in Brazil is importing this one here. When you will prepare your beautiful dishes, using bigger fillets and so. The other fish bacalhau type, they are of good quality too, they are also sold in supermarkets too, it will depend on the receipt you will prepare, here, we don't sell them, but you can find them in supermarkets, they are Ling and Zarbo.

Geisa:- What about those 3 you have here, are they only Cod?

Dona Vera: - Yes, they are of different sizes, but are all Cod.

Geisa:- And where does bacalhau come from?

Dona Vera: - Norway. They call "Porto" because in Porto they do the process of salting there, there it is salted and becomes dried, a company does that procedure, they fish it, take head off, all the rests.. in some places, they even use the tongue, once I've seen a receipt for using bacalhau's tongue at Ana Maria Braga program on TV.

Geisa:- Here at Casa Pedro, do you only sell from this supplier?

Dona Vera: - Yes, only from them, They are from Norway.

Geisa:- Norge is from Norway, then?

Dona Vera: - Depending on the dishe, you shall use preferentially Cod Gadus, the Bacalhau from Norway.

Geisa:- Is this part you are showing me in this receipt, is this a sweet thing being done with bacalhau.

Dona Vera: - No, it's made of olive. .

Geisa:- Oh, I see, I thought it was chocolate.

Dona Vera: - No, not chocolate. You can use Anchovas, capers, olives, cherries. It's this one I'd like to show you (pointing to the folder), dish is beautiful. For you to know, Cod does not shred (desfiar), its meat "unglues" like as if they were chips (lascas).

Geisa:- Related to the consumption of bacalhau, is it equally all through the year?

Dona Vera: - No. Mostly, we consume in Easter, Father's Day, which is a surprise for us many people are now buying a lot for this date and by Christmas, it becomes crazy here, not only in this store, but also in all supermarkets.



Geisa:- Are there companies, restaurants or only people buying?

Dona Vera: - Mostly people, but restaurants too, there is a desalted brand entering the market, but I've heard many people saying it's practical but does not taste good, not tasty like this one we sell here, women do not want to work on desalting it, but that one has with so little salt in it, it has no taste, brand is Bom Porto.

Geisa:- So, it's not the same thing of buying salted from desalted bacalhau?

Dona Vera: - No, there is also another brand too called Riberlves also desalted. Here, we don't sell, they only work with my brand, but if you come to buy here, for example, for the Sales people helping you, ask them to take the skins off for you, they take the skin and cut for you, so when you get home, you put it in a container with cold water and ice in it and put in the refrigerator and keep changing water every 2 hours or every 1 hour and a half, if you are not using bacalhau at the same time and had already desalted it, there is no problem, you dry it with paper towel, put olive oil on it, include in a container with a cover and save it inside the freezer

Geisa:- How long does it last there?

Dona Vera: - 3 months, 4 months. It's not recommended to save it the way you buy it, you have to desalt it to freeze and save, otherwise, it will get spoiled.

Geisa:- Usually, Who are the ones mostly buying bacalhau? Older people? Younger people...?

Dona Vera: - No, nowadays, there is no specific age. There are men coming here and bringing bacalhau, men today is very versatile. Now, most of food purchases are done by them and they are demanding, even more than women

Geisa:- And in those dates that you sell more, can we say Sales are doubled, tripled, etc...?

Dona Vera: - Yes, it triples, but we sell bacalhau in the entire year, every Day.

Geisa:- Bacalhau Sales have been increasing in the last years or not?

Dona Vera: - For sure it is increasing, this is so true that new competitors appeared, Riberlves, Bom Porto, new brands.

Geisa:- Is price of bacalhau decreasing?

Dona Vera: - No, price is being kept, even the opposite, in festive moments, it even increases a little, R\$ 2 or R\$ 3.

Geisa:- And why do you think people are eating more bacalhau?

Dona Vera: - I believe it's a choice of life, I don't eat red meat for years, more than 30 years, I only eat chicken, fish and bacalhau. So when they don't have fresh fish, that thing you have to work to take care of cleaning, etc.. so bacalhau is becoming more popular.



Geisa:- So it's becoming more and more popular each day

Dona Vera: - More popular, as I told you, even the men.. they prefer buying bacalhau, sometimes they call their wives, but besides this Cod I told you... it's also good because they do loin cuts, that means, they take skins off, 90% with no spines, it's more expensive, around R\$ 60 to R\$ 70, completely cleaned, no skin, no spines, nothing.

Geisa:- So then it already comes all cleaned? But the most expensive ones I've seen here is R\$ 39?

Dona Vera: - It's R\$ 39 because it's not cleaned yet, it has skins, if it was a loin, it would be Double the price

Geisa:- I see, but do you sell here the loin itself or shall I ask you to cut that for me every time I want it?

Dona Vera: - You have to ask them to cut, you gotta ask the ones cutting it, because they already do the process of cutting as a loin, then prices is doubled.

Geisa:- Can I choose a piece here and ask you to cut that piece?

Dona Vera: - No, because everything is already cut. They have... I don't know how to explain that... but even in the receipts I gave you the folders of, they tell how to cut bacalhau.

Geisa:- This was one thing I was going to ask you about, if there is a way for cutting it, if I bring na entire bacalhau, how do I do to cut it?

Dona Vera: - To prepare any dish, you can use that one of R\$ 40, the biggest one, you can ask the Guy to cut the way you want, thinner, thicker...

Geisa:- What are the ways of cutting it?

Dona Vera: - To the client's taste.

Geisa:- What are the most common ones?

Dona Vera: - Cut as fillets, then, they would already know. It's Mignon Fillet of bacalhau.

Geisa:- In the supermarkets, you see them a lot in trays, isn't it?

Dona Vera: - Yes, that depends on each point of Sales and in the supermarket, they sell in trays. On the trays, everything is there explained, quantity, if you get to the supermarket, they sell it in trays, but if you would like to have less bacalhau than what they have inside the trays, you can ask the salty products' chief to unpack and cut the quantity you want it.

PART 3

Dona Vera: - The pioneers discovering bacalhau... they didn't have refrigerators and let them be in the sun, so salt made it very dried for the trips they used to do, because they ate it during their trips, so bacalhau entered Brasil 1843. From that on, we started importing bacalhau. Here (pointing to the folder), it's all explained to you. People are kind of "obsessed", they say they will only eat Porto, so we end up putting



Porto on the name too not to miss selling them. But, we are not fooling the consumers, we are only omitting what you want to know, because nobody wants to know how is the process of salting.

Geisa:- So all bacalhau Porto are not Porto? What about this Cod?

Dona Vera: - Yes, let's say like that, why is like Porto? Because it's salted in the company there in Portugal. But actually, they don't have bacalhau there in Portugal, Norway is the one having it, Norway sends them to Portugal. But the funny thing is... I believe in the world of the greatest importers are us. Actually, this cooperative called Norge, they are the fishers of in Norway and they get together to promote bacalhau's consumption, so when you sell bacalhau, these fishermen gain some commission there. It comes directly from there and it's distributed to many places and, you know, 9 in each 10 people say they adore, they Love bacalhau, it's really becoming popular and I hope this is true because did you know that cattle growing pollutes the atmosphere?

Geisa:- Yes, I've heard of it, I also avoid red meat.

Dona Vera: - Me too. When they expel gases... if they are many, it makes a difference in the world. Eating more fish would be ideal, because we would have more options than cattle as an option, so we wouldn't kill the poor ox. But I eat chicken... when cattle is slaughtered, like they used to do before, beating them, they groaned because they know they would die, they are suffering, with anger, all that, all that adrenalin we eat. I don't eat it.

Geisa:- Thank you very much, you were very clarifying to me.



RIO EXTRA (PART1)

Geisa: - I would like to understand a little about types of bacalhau, can you tell me?

Sales person: - Sure, we have this type here or Porto type, the latter is a refined bacalhau.

Geisa: - Refined in what way?

Sales person: - It is a lot different from these other ones here.

Geisa: - How many different types are there?

Sales person: - Here, this fillet of Porto comes from China and this other one is Norwegian.

Geisa: - So this one here is Norwegian Porto Imperial and this one here is Porto from china. But do you only have Porto types here or any other type?

Sales person: - Here, we usually have other types, but Porto is the one people looking for the most.

Geisa: - This was something I would like to ask you, do people look for Porto at the most?

Sales person: - Yes, they do buy more Porto, for sure.. this other one here is Zarbo.

Geisa: - And where does Zarbo come from?

Sales person: - It comes from the same supplier, Norge, it's also from Norway.

Geisa: - So there are Zarbo and Porto types, then?:

Sales person: - Porto here... we have 3 types, the thickest Porto, the Imperial that I already showed you, this is Cod Gadus Morhua, this is the Best existing bacalhau, then comes this other one here that is the common Porto that is also a good bacalhau.

Geisa: - What is the most expensive one?

Sales person: - The most expensive one is Imperial, and we also have the special bacalhau, that is the loin of bacalhau only.

Geisa: - But do you have loin here among those or do we need to ask for cutting it?

Sales person: - Yes, we do, it's this one here, bacalhau with no skins neither spines. This one here is already prepared, all cleaned.

Geisa: - Oh I see, so then it's the same Porto, but with skins off. And here you have the same, but with skins yet. So, difference would be in the price, then?

Sales person: - Yes.

Geisa: - And why do we eat bacalhau more in the Season's Greetings?



Sales person: - Usually, it's more in festive dates, New Year, Eastern, but all through the year we have bacalhau here.

Geisa: - Do you sell more in the end of the year? If so, how much more?

Sales person: - It's very much more, I wouldn't know how to say, but we do invest more, much more. We sell it in bulks, the entire bacalhau, people come and ask us to cut.

Geisa: - And usually, what are the cuts people prefer? On trays or not? What are the options?

Sales person: - No, in bulks is the entire bacalhau, we cut in the middle. Client asks, we cut, we take the tail out and also the spines.

Geisa: - Do you cut here yourselves? Do you buy them in entire units?

Sales person: - We buy entire bacalhau.

Geisa: - Does bacalhau only come from Norway?

Sales person: - No, it is like I said before, it comes from Norway, but there is also this supplier from China, this is another type of bacalhau, is Porto too, but from another supplier.

Geisa: - And when do we use shredded (desfiados) or in chips (lascas)?

Sales person: - That depends on the client, if client thinks is more practical the shredded one, they only have to desalt it, the entire unit makes people work a lot, but this depends on the case and on what you want to prepare

Geisa: - And today, people from different ages are coming here to buy bacalhau or is there a specific age range people come to buy more?

Sales person: - No, today, there are no more differences, so in festive moments, everybody buys.

Geisa: - In all places I'm going today I'm seeing bacalhau, does that mean people are consuming more bacalhau today than in the past?

Sales person: - Yes, specially because this year price is lower, so people are buying more.

Geisa: - Why do you think price has decreased?

Sales person: - Due to the Dollar rate, because bacalhau is imported and Dollar is lower than before.

Geisa: - And do you only work with those 2 suppliers you mentioned or does that change?

Sales person: - We do have other suppliers, for example, this common Porto here is from another supplier, Riberalves.

Geisa: - Ok, I believe this Riberalves is from Portugal... and that one from China, Who are them?



Sales person: - I don't remember their names.

Geisa: - And that one from Norway you mentioned the supplier is called Norge?

Sales person: - Yes.

Geisa: - (reading the label) fabrication on December, 2009 due to December 2010 , so then it lasts for a year? So bacalhau is something you can store, if I buy it now, I can store it?

Sales person: - If you store it in a protected place, it lasts long.

Geisa: - I see, great!.. you also include olive oil near bacalhau... do people prefer Galo olive oil?

Sales person: - Yes, this way we expose the products, we call it "coupled", because people are used to buy it and eat them together, so we include them together here too.

PART 2

Geisa: - Do you have Arenque? Do you buy them frozen or fresh? Or do you buy them fresh and freeze them? Where do they come from?

Sales person: - Yes, we have some here. We buy them already frozen.

Geisa: - What is the difference between the common sardinha to this Arenque?

Sales person: - The size mainly..

Geisa: - Is it more expensive than sardinha?

Sales person: - It's R\$ 1 more expensive, basically, today, in our national market promotion here, it's costing R\$ 1,69 and it's much bigger, you can bake it.

Geisa: - And where do they come from?

Sales person: - From Norway.

PART3

Geisa: - So they come already frozen and what is the process for unfreezing them?

Sales person: - The correct thing would be leaving them outside the chambers to a natural unfreeze, but since we need to have them faster, we take the ice out, we beat the ice up it loses .

Geisa: - And does Arenque sell well?

Sales person: - Yes, they do. They don't sell like sardinha, but sell well.

Geisa: - What is your Arenque turnover? What is to sell well for you?



Sales person: - On average, I sell 2 boxes, 40kg / Day. Depending on the price... if it's like it's today, we sell like that, but if price is higher, not that much. Sometimes it comes for being sold at R\$ 3,99, then it doesn't sell that much.

Geisa: - As for comparing, you sell 40kg/Day of Arenque, what about sardinhas?

Sales person: - From 200kg/Day to ou 300kg/day.

Geisa: - Much more, I see.

Sales person: - It's because people already know more, sardinha is ours, that other one is Portuguese, some people come from Europe and know them from there.

Geisa: - Is there any moment you can't sell sardinhas? Then, do you sell more Arenque instead or not really?

Sales person: - There is the moment of sardinha's defense, but it does not make any difference for Arenque, because this one is only sold to the ones knowing it. The ones consuming Arenque are the ones who know them. If you tell people, "there is no national sardinha, but there is Arenque instead, taste is practically the same", people would be suspicious, they only know if they already know Arenque, otherwise, not.

Geisa: - So there are times where there is no sardinha?

Sales person: - Sardinhas comes every 2 months, they stop fishing them for defense.

Geisa: - Does that happen with Arenque too?

Sales person: - Arenque is always available. They come frozen, so we always have them.

Geisa: - Thank you so much.



RIO ZONA SUL STORE 1 PART 1

Geisa: - Are there kinds of “bacalhau”?

Clerk: - Yes, here we have two kinds of “bacalhau”. We have Saithe, which is not Zarbo because it's darker and thinner. We also have Gadus Morhua which is thicker, the steak is thicker. Here you see the loin. Gadus Morhua’s loin, which is the thickest “bacalhau”.

Geisa: - Does it make difference? In price, I mean.

Clerk: - Not only in price, but it tastes better, the dish serves better.

Geisa: - Which one serves better?

Clerk: - This one here. Gadus Morhua.

Geisa: - How much is a kilo of Gadus Morhua?

Clerk: - R\$ 49.80. When it’s on sale, costs R\$ 39.80.

Geisa: - What about the loin you mentioned?

Clerk: - R\$ 56.90 a kilo.

Geisa: - You say it’s more expensive because it comes clean, isn’t it?

Clerk: - Yes, you have the loin only, no fish bone. Only the loin.

Geisa: - What about Zarbo?

Clerk: - Zarbo costs R\$ 19.80 but it’s darker. Some people think it’s not so good because of that, but it’s a very good “bacalhau”. It’s darker because of the fish’s nature.

Geisa: - How should I choose it?

Clerk: - If I were you, I’d buy a thicker one.

Geisa: - I got it.

Clerk: - A good “bacalhau” is this Gadus Morhua. It’s one of the best. This one is pretty good, it serves well. If you only have the loin, don't tear it into shreds; make “bacalhau” balls or anything else. Leave it in pieces, it’s the best. O good “bacalhau” dish is made with steaks or loins.

Geisa: - So, we choose the “bacalhau” according to how much we can pay, not because of a kind that suits better specific recipes?

Clerk: - Exactly. We choose it because of the amount of meat. The fish itself is the same: the same quality and flavor. It’s not very different. The thing is choosing the meaty one. This one here has no fish bones;



you are going to pay only for the fish. The one over there has a bit of fish bones. You can buy the steaks. Even though there are some fish bones, you cannot make difference between their tastes.

Geisa: - Where are the shreds?

Clerk: - Here. This is Gadus Morhua, which costs R\$ 49.80. It's easier to tear it into shreds. When you boil it in order to desalt, you'll see it's much easier to shred it, if compared to this one here that is not so good for that.

Geisa: - So Gadus Morhua is better for tearing into shreds than Zarbo.

Clerk: - If you want to turn it into shreds, take it all. It's excellent for "bacalhau" balls

Geisa: - Where does this "bacalhau" come from? From Brazil?

Clerk: - It's Norwegian.

Geisa: - Are all of them Norwegian?

Clerk: - Yes, all of them.

Geisa: - Why do we usually eat it on Christmas Holidays and other special dates?

Clerk: - It has to do with tradition. You can find "bacalhau" from January to December, if you like.

Geisa: - Yes, I can see you have it to sell now, but do you sell it more on a specific season?

Clerk: - The last quarter, for sure. From October to December.

Geisa: - How much more do you sell? Three times more?

Clerk: - Yes. Because this is the time people really want to buy it.

Geisa: - You showed me two cuts: loin and shreds. And these steaks here also. Is there any other cut I can buy?

Clerk: - You can buy the whole piece.

Geisa: - If I want, can I cook the steaks this way, or do I need to clean it first?

Clerk: - No, you need to desalt it first. It's too salty. You have to desalt it in water. Leave it there for some time. Then you start cooking. You can buy it desalted. I have it here.

Geisa: - That's what I was going to ask. You already have it desalted then.

Clerk: - I have it here, desalted steak.

Geisa: - But it's frozen desalted. Why?



Clerk: - Because it's past the desalting period. When you desalt it and don't freeze it, it won't last long. After you desalt it, the temperature changes. Salt keeps the "bacalhau" fresh.

Geisa: - I got it.

Clerk: - It keeps it better. After the salt is gone, you must keep it at such temperature.

Geisa: - What about the taste?

Clerk: - It doesn't change, if you are careful during the process. No changes in quality, taste. It doesn't change at all.

Geisa: - I got it. How does it work? Are there "bacalhau" brands? You've already shown the types.

Clerk: - Bom Porto is a brand, there others, but here, at Zona Sul, you're going to find Bom Porto.

Geisa: - I see. So it's up to you. There are other brands.

Clerk: - Many others.

Geisa: - Have people eaten more "bacalhau"? Less?

Clerk: - They've eaten more.

Geisa: - Why is that?? Any difference in price?

Clerk: - It happens because, as told you, it is part of the Brazilian and catholic tradition not to eat beef at the end of the year. We usually eat fish. Besides, the price of meat is pretty high, so people are buying more "bacalhau". "bacalhau" is more affordable now.

Geisa: - But has the price reduced?

Clerk: - It's the same thing. From October to December start the promotions, as you see here it's R\$ 39, which is the best we have. If you want to cook it in December, you'd better buy it now, because it costs less now.

Geisa: - When you say "buy it now", you mean I can stock it? How long can I keep it?

Clerk: - Of course. It lasts long if you buy it salty and freeze it, no problem. When you feel like cooking it, just thaw it and use it all. Just desalt and cook it all. You have to cook it all.

Geisa: - I got it. How long can I stock it?

Clerk: - Well, about 5 months, no problem. Salt fish lasts long. In the past, there was no such technology like refrigerators, freezers etc., so the fishermen salted the fish in order to keep it fresh. After being salted, the fish keeps fresh for months.

Geisa: - I got it. What about sardines and fresh fish?



Clerk: - We don't have it here. We don't sell fresh fish.

Geisa: - Don't you have herring? Have you heard of it?

Clerk: - I have heard of it, but we don't sell it here. There are other stores of our chain, which sell fresh fish.

RIO ZONA SUL STORE 1 PART 2

Geisa: - I came here once and I didn't see desalted "bacalhau" here. When did you start selling it?

Clerk: - We used to sell another kind of "bacalhau"; there weren't many options, and the demand increased.

Geisa: - Have you been selling it for over a year?

Clerk: - Oh yes. More than a year. It's not new. We worked with only one brand, but other brands started to come, then we started selling Bom Porto. Now, it's the only "bacalhau" brand we sell. It's Norwegian. This Corte d'ouros is exclusive sale of Zona Sul, because it's a kind of cut. Zona Sul buys it, salts it and does the whole conservation process. Then, it's cut and classified. We cut it in steaks, loins, shreds. After that, it's tagged with Zona Sul label, because it's exclusive.

Geisa: - I got it.

RIO ZONA SUL STORE 1 PART 3

Geisa: - Sardines. Have you ever heard of a fish called herring?

Clerk: - It's a big frozen sardine, full of fish bones.

Geisa: - Is it?

Geisa: - How do we cook it? Is it different from regular sardines?

Clerk: - I can't cook it.

Geisa: - Do you have sardine steaks?

Clerk: - It's R\$9/kg.

Geisa: - And if I buy the whole fish?

Clerk: - R\$4.

Geisa: - Can she take a picture? Of the fish only, no signs, nothing.



RIO CONTINENTAL

Clerk: - Saithe is best for making codfish balls. This one here is called Porto, and it's best for salads.

Geisa: - So there are 2 kinds. What's the difference between them?

Clerk: - The one below is Saithe, it's dark, and it's best for codfish balls. The one on the top is Porto, best for salads.

Geisa: - I got it. Is that it? Only 2 kinds?

Clerk: - There is more: Ling and Zarbo.

Geisa: - So I use these ones here for oven recipes. And have people eaten it throughout the year, or it happens only on special dates?

Clerk: - Holy Week.

Geisa: - So sales double? Triple?

Clerk: - Sales increase a lot.

Geisa: - Why does this difference in price take place?

Clerk: - As I said, this one here is used for codfish balls and this is special.

Geisa: - Oh, this one is a lower quality codfish.

Clerk: - Yes.

Geisa: - Where do they come from? Brazil?

Clerk: - This one here comes from Brazil, almost all of it. This one here comes from abroad, Norway.

Geisa: - Do you think Brazilians have eaten more codfish throughout the year?

Clerk: - They definitely have.



RIO WAL MART PART 1

Geisa: - How do I know the difference between these two codfish here, buddy?

Clerk: - The little one here is Zarbo, and this one here is Porto.

Geisa: - How do I know which one is best for each recipe?

Clerk: - Zarbo is better. It's good for salad, torn into shreds.

Geisa: - Do you have it available throughout the year?

Clerk: - No, we have it today because we have just gotten an extra load today.

Geisa: - So, you don't usually have it.

Clerk: - Nope. Sometimes only.

Geisa: - When do you usually have it?

Clerk: - About Christmas time: November, December, January and February. Because we don't sell much of it in the other months, so we don't invest in it.

Geisa: - And you buy other parts of codfish?

Clerk: - We buy the whole codfish.

Geisa: - What about these ones, what are they?

Clerk: - They are imported Ling. Same kind of that first one there.

Geisa: - Do you cut it this way or there is another way of cutting it?

Clerk: - We often cut it in fish steaks.

Geisa: - I'm working on a codfish material and I want to know if its consuming is increasing. Is it?

Clerk: - Yes, because the people's purchasing power is increasing.

Geisa: - What about the price? Has it lowered?

Clerk: - Yes, it has. Nowadays I sell one kilo of Ling for R\$ 19.40. It's a good inexpensive codfish. But when it is close to Christmas, it reaches R\$40.00.

Geisa: - I myself, for example, can't see any difference between them. Is there anything I should know to make this difference? Is there a difference in size, for example?

Clerk: - Zaibro is this tiny one here. It has a small cut. Ling is the biggest one, but we say it's slim, thin.



Geisa: - That's it, thanks.

<u>PART 2</u>

Geisa: - I see there is some sardine there, but do you always have it? Or there is a certain time of the year you don't have it?

Clerk: - Sometimes we don't.

Geisa: - And people want to buy it anyway?

Clerk: - They do, but sometimes we don't have it.

Geisa: - Do you know herring?

Clerk: - Nope.

Geisa: - Do you have it here? Don't you know it? Fresh fish?

Clerk: - The meat manager might know about that because he has been working with it for a long time.

Geisa: - Ok, thanks.

Geisa: - Do you have herring? Do you know it?

Clerk: - Yes, but we don't have any. It's difficult to get it. We order it, but they don't send it to us.

Geisa: - So you order it? Why is it so difficult?

Clerk: - They say it's because when it's available, it's expensive and it's not worth it to buy.

Geisa: - "They" you mean Walmart?

Clerk: - No, I mean the supplier.

Geisa: - They don't want to send it to you? Why? Would it be so different from the price of sardine?

Clerk: - It'd be a great difference.

Geisa: - Is it the same supplier for all the fish you have?

Clerk: - For fresh fish I have 2 suppliers. For frozen fish, I have many.

Geisa: - Who supplies herring to you?

Clerk: - Paulo Junqueira and Carlos Fernandes.

Geisa: - But don't they own a company? Can I search the web this way?

Clerk: - They do own a company.



Geisa: - But what's the company's name so that I can search the net?

Clerk: - Costa Sul Pescados and Bom Peixe. The other one is Frescada.

Geisa: - Ok, but have you ever seen any herring?

Clerk: - Yes.

Geisa: - What's the difference between herring and sardine?

Clerk: - Herring has a higher quality.

Geisa: - But it's similar to sardine, isn't it?

Clerk: - Yes, a bit.

Geisa: - And do regular consumers eat it?

Clerk: - No, they don't look for it. It's rare to see costumers looking for it.

Geisa: - Would it be because it's imported?

Clerk: - Yes, people don't often look for this kind of things.

Geisa: - I got it, thanks.

PART 3

Geisa: - Hi, I'm working on the codfish issue, and I need to know what are the kinds of codfish. Could you tell me?

Clerk: - I'll be very frank to you, I don't know much about codfish. But there are several kinds of it. For example, I know that the one we sell the most, which is the cheapest is this one here, Porto. It's lighter. This one here is Zarbo, a bit harder, but it doesn't mean it's bad. It's light, has more salt, and it's different from Porto that is yellowish. There is also Ling and Saithe.

Geisa: - If there's no sing on it, it's difficult to know, isn't it?

Clerk: - It depends on your expertise. There are people who come here and know more than I do.

Geisa: - Is there a profile of client who prefers a specific kind of codfish?

Clerk: - Elderly people usually buy Porto and Ling because they use it for codfish balls. Because it's easier to cut and turn into shreds. See those shreds there? They're all Porto because it's easier to turn into shreds. Younger people prefer this one here, Saithe.

Geisa: - I got it, but do you have codfish throughout the year? Is there any season which you have more codfish?



Clerk: - Yes, usually at Christmas and Holy Week.

Geisa: - How much more, double?

Seller: - Much more. But it's rare to see this stand empty. We must always have it, and there're always costumers to buy it.

Geisa: - Do you think consumption is increasing? Why?

Vendedor: - It's increasing. We didn't use to sell that much, there's always a promotion, for example, Porto costs R\$23.50. A couple of days ago it was R\$27.

Geisa: - What are the most popular cuts?

Clerk: - It doesn't come in boxes. This part comes as a whole and we cut it. Some clients prefer to take it all, but we generally cut it the size of a hand palm.

Geisa: - What is this one here?

Clerk: - This is the best part of codfish, it's Porto, that is with no fish bones or skin. It means that the codfish you see packed here has no fish bone and skin because we take them off and sell the best part of it only. We make it "easier" to clients because it's more expensive.

Geisa: - How do you usually cut it?

Clerk: - Steaks and torn into shreds. We have two kinds of shreds: codfish and codfish-like shreds.

Geisa: - So it's not codfish?

Clerk: - No, it's something else. It's fish, but I don't know which.

Geisa: - No one knows which it is.

Geisa: - Does it have the same price?

Clerk: - It's on sale today, R\$14.90.

Geisa: - But does it cost the same as shreds of Porto?

Clerk: - Nope. This one here costs R\$23.90 and shreds cost R\$14.90.

Geisa: - Why are these pieces here different?

Clerk: - Because this one here is what is left, we don't throw it out. Some clients like it this way. If they like it, they take it.

Geisa: - Are the stakes usually like this?



Clerk: - Yes, we pack the pieces. I have already tasted those shreds and it's very similar to codfish, but it's not.

Geisa: - Where does this codfish here come from? For example, where do Zarbo and Porto come from?

Clerk: - Well, I don't know, I just know these two kinds.

Geisa: - It's ok, thanks.



SP CARREFOUR PART 1

Geisa : - Could you help me understand a bit better about “bacalhau”? What’s the difference?

Clerk: - Sure.

Geisa : - Could you describe those types for me?

Clerk: - There’s Ling, Saithe and Porto Morhua.

Geisa : - So this capital L stands for Ling?

Clerk: - Yes. And Porto Morhua.

Geisa : - So there are 3 kinds. How can you tell the difference?

Clerk: - It’s usually the color. This one here is Morhua; it’s the whitest. Then, there’s Ling, which is also white. Saithe is a bit greenish. This one here is good for salads.

Geisa : - Which one? Saithe?

Clerk: - Yes. Balls. You can use it for dishes, but it’s a bit harder.

Geisa: - Ling, you mean.

Clerk: - Yes. Then you have Porto that is soft.

Geisa : - So I could use it this way, the whole fish.

Clerk: - Yes, use in steaks.

Geisa: - I got it. Why are they usually cut like loins and this one here is round?

Clerk: - It’s like a roll. They were trying another cut and made this roll, which is nothing but rolls of “bacalhau”, isn’t it? It’s the same thing.

Geisa : - I can use it the same way. What about those ones there?

Clerk: - They’re not “bacalhau”; it’s “bacalhau” like.

Geisa: - Where does this codfish come from?

Clerk: - From Norway.

Geisa : - And do you sell it throughout the year?

Clerk: - Yes.

Geisa : - But there are times when you sell more, right?



Clerk: - Yes, at Christmas.

Geisa : - So sales double.

Clerk: - Yes.

Geisa: - How much more do you sell? Ten times more?

Clerk: - About 20 times more.

Geisa : - And the price variation would be Saithe 22.

Clerk: - That's the cheapest. Then there's Ling. The most expensive is Morhua.

Geisa : - So, do you sell them packed only, or there are other forms of selling it?

Clerk: - If needed, we always have the whole fish in stock. I don't know if we have Saithe, but we always have big pieces.

Geisa : - How do costumers prefer it? Whole or packed in pieces?

Clerk: - People prefer it packed in pieces. But if they want it, we go get it.

Geisa : - Who consumes more "bacalhau"? Who usually buys it? Youngsters? Madams? Men?

Clerk: - It doesn't make much difference. But madams usually buy it, yes. Youngsters usually buy it on holidays.

Geisa : - When buying "bacalhau", what should I bear in mind to choose it?

Clerk: - The thicker the better.

Geisa : - What about this color thing? If it's darker, it's not so good, isn't it?

Clerk: - Nope. It's only bad if it's reddish. But when it's like this, it's good. It just has a harder and stronger taste meat.

Geisa : - I got it, buddy. Thank you.

SP CARREFOUR PART 2

Geisa : - Do you know this fish called herring?

Clerk: - We don't have any herring.

Geisa : - But does it exist?

CLerk: - Herring is a sardine.

Geisa : - Sardine? Where does it come from?



Clerk: - Norway.

Geisa : - Oh, it's different then. But are you used to having it?

Clerk: - We used to.

Geisa : - At the time you used to sell it, was it fresh?

Clerk: - It's frozen.

Geisa : - So you used to sell it frozen?

Clerk: - We kept it there, it thawed and it was sold on ice. In the freezers, it's frozen. But when it's out, it's just sold on ice.

Geisa: - I got it. Is it similar to sardine, in terms of size and taste?

Clerk: - It's bigger. And it tastes better than sardine.

Geisa : - Do you sell whole sardines?

Clerk: - We take their heads off.

Geisa : - Head's is off, but if I want to have steaks, it comes on a tray. Is it fresh or frozen?

Clerk: - It's fresh.

Geisa: - Ok, thanks.



SP MERCADÃO SHOP 1 FISHERY

Geisa: - Do you have this fish called “arenque”?

Clerk: - Nope. Not “arenque”.

Geisa: - But do you know it?

Clerk: - Yes, it’s a sardine.

(Other people or sellers say: There’s salt “arenque” that is salted and smoked).

Geisa: - Don’t you have it fresh?

Clerk: - No. But do you where you may find it? At Extra. They have it there.

Geisa: - Why is that? Is “arenque” not from here?

Clerk: - Nope, it’s imported.

Geisa: - You said it’s a sardine. What’s the difference between “arenque” and sardines?

Clerk: - It’s a sardine but it’s different from the Brazilian sardine. It’s bigger, thicker, and very good to bake.

Geisa: - Oh, it can be baked too. Thank you.

Clerk: - I have Portuguese sardine if you like.

Geisa: - Can be. Where is it?

Clerk: - It’s beautiful isn’t it! Look, over there!

Geisa: - Oh, it’s frozen Portuguese sardine.

Clerk: - It has to be. It’s impossible to work with the fresh one. It’s frozen fresh.

Geisa: - What’s the difference between this one and that one there?

Clerk: - It’s a big difference. This is the best sardine in the world.

Geisa: - It’s Portuguese and is it always frozen?

Clerk: - It has to be. It’s either frozen or salted. You buy it frozen, so it’s fresh. I don’t like salted fish. Would like to take it home and try?

Geisa: - I’m just looking now, because I’m with some friends there. Thank you.



MERCADAO SHOP 2 BACALHAU

Geisa: - Excuse me, would explain to me a bit about “bacalhau”?

Clerk: - This is the “bacalhau” steak. It’s ready, clean, no skin, no fish bone. Just cut it the way it’s packed.

Geisa: - Ok, but what kind of “bacalhau” is that?

Clerk: - It’s Cod Gadus Macrocephalus. This one here is called Cod Gadus Morhua.

Geisa: - What’s the difference?

Clerk: - They are the 2 best kinds of “bacalhau” that we sell. This Gadus Macrocephalus and this Gadus Morhua.

Geisa: - Between Gadus Macrocephalus and Morhua, which one is the best?

Clerk: - Morhua, because it’s softer. Its meat is softer, you know, because it eats in the middle of the sea.

Geisa: - What about price?

Clerk: - It’s more expensive.

Geisa: - How much?

Clerk: - It’s about R\$60/kg. Macrocephalo costs R\$45/kg. An average fish like this.

Geisa: - Whole fish. But, when you cut it, does the price change?

Clerk: - It does. When we clean it, we lose about 20% of fish, so we add it up to the price.

Geisa: - I got it. Is that it? Only 2 kinds? Or are there more?

Clerk: - No, there are 5 kinds of “bacalhau”. Those 2 I’ve already told you – Gadus Morhua and Gadus Macrocephalus – Ling, which is a narrow fibrous white. It’s beautiful, but you can see fibers on it. The other one is Saithe. It’s good “bacalhau”, but it’s dark. There’s another one called Zarbo; it’s not a very good “bacalhau”. We don’t sell it here. We just work with these two. We cut it in steaks, loins and shreds.

Geisa: - There are several cuts. How should I use each?

Clerk: - You can use it for anything you want. For “bacalhau” with vegetables, you use the steaks. There is one here, the loin. Let me show you.

Geisa: - Oh, I got it. Here you cut only the loin, the middle of the meat, right?

Clerk: - Only the loin has no fish bones, nothing.

Geisa: - What kind is this?



Clerk: - It's Gadus Macrocephalus. The one I'm cutting now. This one here is Gadus Morhua; that soft one I told you.

Geisa: - How do I know the difference between Morhua and Macrocephalus?

Clerk: - By the skin You just know it if you see the skin, on the whole fish. After cutting, you can't recognize. We may know it, but people can't tell the difference.

Geisa: - What's the difference in skin of the whole fish? Is it different?

Clerk: -The skin is pretty much the same. The tail points out the difference.

Geisa: - So, the tail is different.

Clerk: - You can see that the Macrocephalus's tail is whitish; the other is totally black.

Geisa: - Morhua has black tail tip; Macrocephalus's is whitish.

Clerk: - Its fins are black, you know. This one's here is whitish. But these ones here are top quality "bacalhau". Both of them are. The other ones, as I said, are Ling, Saithe and Zabro, which lower quality "bacalhau". Supermarkets usually offer them.

Geisa: - So, the consumer can't tell the difference unless it sees the tail or buys the whole fish.

Clerk: - If you buy a whole fish, you'll know the product you're taking home: Gadus Morhua or Macrocephalus. After cleaning it, there's no way of knowing it. That's why we set some reliable person for the job, explaining if it's Gadus Morhua or Macrocephallus. That's the way we work. But not many people do it this way, you know. Many sell Macrocephalus as Morhua.

Geisa: - Why is that? Don't they know it?

Clerk: - No, they cheat. To charge more.

Geisa: - I see, just cheating. I've heard about "Rei do Bacalhau". I thought it was only a restaurant, does it have to do with you?

Clerk: - Nope, the restaurant has nothing to do with us.

Geisa: - Do you have "bacalhau" available throughout the year?

Clerk: - Yes.

Geisa: - Is it usually the same amount, or there are times when you have more?

Clerk: - At the end of the year and Easter time, we sell more, so we have more.

Geisa: - So people consume it a lot. How much more?

Clerk: - We massively sell it. We sell tons of "bacalhau". Only this store.



Geisa: - How much do you sell off season?

Clerk: - Much less. It gets pretty calm. About 600kg a month. But we sell much more at the end of the year and Easter.

Geisa: - Have people eaten more “bacalhau”?

Clerk: - Yes, much more.

Geisa: - Why is that?

Clerk: - Because it’s healthier, isn’t it? Then, people see that on TV, for example and buy it. It happens not only with “bacalhau” but also with fish.

Geisa: - Regarding the prices, have they decreased a bit or they keep the same?

Clerk: - There was a time prices increased a lot, but now it has a nice price. Prices decreased a bit.

Geisa: - Who buys “bacalhau”? What’s the profile of this person?

Clerk: - The importing companies buy it. And we buy from them. They import it, stock it, then distribute it.

Geisa: - I mean, what kind of consumer comes to your store to buy it?

Clerk: - Everybody buys “bacalhau”. There’s no age now. Most of people buy it. Concerning price, this Gadus Morhua is cheaper now. It reached R\$ 80, R\$ 70 a kilo. Now it costs an average of R\$50 a kilo. If you pay R\$65 for Morhua, it’s expensive.

Geisa: - Why is that? Would it be the dollar variation? Where does “bacalhau” come from?

Clerk: - From Norway. It’s fished there, so it varies a lot.

Geisa: - It’s great, thanks.

SP MERCADAO SHOP 3 BACALHAU

Geisa: - Could you explain to me a bit about “bacalhau”? Which ones do you sell? What’s the difference between them?

Clerk: - We have Porto. So I have 10/12, which we store here, plus 7/9 and 8/10.

Geisa: - What is it??

Clerk: - It means that, this one here, for example, comes with 10 to 12 “bacalhau” in a box, so it’s thinner. If it’s 7/9, it means it’s thicker, because there are 7 to 9 “bacalhaus” in a box. 8/10 is even thicker, got it?

Geisa: - Are they all the same fish?



Clerk: - Yes. Only the size changes. Then we have it in shreds, loin shreds, which are these ones here. And we have the loin here.

Geisa: - Those long pieces are loins.

Clerk: - This loin if from Gadus Morhua. It's one of the best Porto "bacalhaus" in the world.

Geisa: - So Gadus Morhua is Porto.

Clerk: - Yes..

Geisa: - All the "bacalhaus" you sell are Gadus Morhua?

Clerk: - Yes. We also have steaks. We have it in shreds, loins and steaks. For example, loin costs R\$ 120 a kg. (8/12 costs R\$55 a kg, because it's bigger **I guess he made a mistake before**). 7/9 costs R\$49 a kg. 8/12 costs R\$45 a kg.

Geisa: - Do you believe the proce of "bacalhau" has decreased, as time passed by?

Clerk: - I started working about a year ago, and since then, the price is pretty much the same. There had been no ups and downs in price.

Geisa: - What kind of people usually buys "bacalhau"? I was told it's usually ladies.

Clerk: - We sell "bacalhau" more at Holy Week. We sell it a lot. "Bacalhau" sales also increase at the end of the year. We have clients nationwide.

Geisa: - When you say it grows, how big is this growth?

Clerk: - It increases a lot. It's likes 20 times better before the Holy Week than the rest of the year. Except the end of the yeas, of course, which is also great.

Geisa: - I imagine that, at the end of the year, everybody buys "bacalhau". But how is the profile of this public that buys "bacalhau" off season?

Clerk: - We see lots of tourists from North, Northeast and South Brazil. They're always buying "bacalhau" here.

Geisa: - So, it's your public is comprised basically of foreigners.

Clerk: - Some of our public is from São Paulo, but they don't buy much. When it's off season, tourists buy more.

Geisa: - What about the end of the year?

Clerk: - In that case, our public is from São Paulo.

Geisa: - Are they usually madams, youngsters or it doesn't make any difference?



Clerk: - No difference. Men, women... everybody comes.

Geisa: - Interesting. Where does this “bacalhau” come from?

Clerk: - From Portugal, but it’s fished in Norway.

Geisa: - So you buy it from Portugal. The route is Norway – Portugal – Brazil.

Vendedor: - The Portuguese have the expertise in salting “bacalhau”.

Geisa: - I got it. So they fish it in Norway, salt it in Portugal then you buy it, already salted.

Clerk: - Exactly. See this Imperial here? It’s from Portugal. See that Porto in the fridge over there and these pieces of Gadus Morhua here? They’re all from Portugal. The genuine “bacalhau” is fished in Norway, in those cold waters of North Europe. But the Portuguese have te expertise in processing it, salting and drying it.

Geisa: - What about this Cruzilha “bacalhau”?

Cler: - This is just the name of the stand.

Geisa: - I see. It has nothing to do with the supplier.

Clerk: - No. It’s a recipe. In case you want it, we give you so that you can cook “bacalhau”.

Geisa: - Nice. I got it. That tag over. Is it yours? Isn’t it the supplier’s?

Clerk: - It’s ours; this is the recipe.

Geisa: - What is this brascode thing?

Clerk: - Nothing. The paper manufacturer decided to make this brascode.

Geisa: - I got it. Why these shreds here are whiter than those ones there?

Clerk: - It’s salt fish torn into shreds like “bacalhau” torn into shreds. It’s made in Portugal. It comes like this. You can buy it in bulk.

Geisa: - But it’s not “bacalhau”?

Clerk: - It’s xxxxxx “merluza” from Alaska. It tastes like “bacalhau”, but it’s “merluza”.

Geisa: - I see. This one beside it is real “bacalhau”.

Clerk: - Yep, this is Gadus Macrus. It’s good real “bacalhau”. This one here comes from Portugal, but it’s not topnotch.

Geisa: - Are they different from this one packed here?

Clerk: - They’re different from Porto. This one here is Porto.



Geisa: - I noticed the difference in color. It'll do, thank you.

MERCADAO SHOP 4 BACALHAU

Geisa: - Could you explain to me a bit about “bacalhau”?

Clerk: - I have these shreds here, which is Porto. There’s Saithe torn into shreds. It’s another kind of “bacalhau”. There’s this whole Porto. This one here is the smallest, it’s on special offer, for R\$ 35 and this one for R\$ 28.

Geisa: - If they are the same Porto, why is there difference in price?

Clerk: - Due to its size and thickness. This “bacalhau” comes in a wooden box. Eleven fish, which means about 50 kg of product. Those over there come in card paper boxes, weighing 25kg.

Geisa: - Where do they come from?

Clerk: - From Norway. Any and all “bacalhau” is Norwegian. But Portugal has this tradition of salting it. So it’s done there, in Portugal.

Geisa: - I see.

Clerk: - This kind of “bacalhau” is called Gadus Morhua. It’s a softer “bacalhau”, it lives in deeps seas. It goes deeper than that one over, which is fed with schools of fish while this one is fed with algae.

Geisa: - Which one?

Clerk: - Gadus Macrocephalo.

Geisa: - It’s all “bacalhau”, but this one here is softer. IS the price different too?

Clerk: - Yes. This one here is on special offer for R\$ 55/kg.

Geisa: - Morhua.

Clerk: - Yes, and Macro costs R\$ 35 a kilo, and its steaks cost R\$ 55.

Geisa: - Do you have “bacalhau” the whole year, but there are times when you sell more, right?

Clerk: - During Lent, Easter and Christmas.

Geisa: - How much do sales increase? About five times?

Clerk: - A lot more.

Geisa: - Ten times more. Do you think Brazilians have eaten more “bacalhau”? Why? Any difference in price?



Clerk: - Now it's much cheaper. This "bacalhau" cost R\$ 65, then decreased to R\$ 48. Now the price increase a little. But last week cost R\$ 48.

Geisa: - I see. Would you also have it desalted?

Clerk: - Desalted Morhua and Macrocephalo. R\$ 55 and R\$ 65 Morhua.

Geisa: - What's the difference? Any difference in taste?

Clerk: - Salted tastes better.

Geisa: - What do people prefer?

Clerk: - The salt "bacalhau". When you have no time for desalting it, like in our daily basis, for example, people buy that one.

Geisa: - Is it more expensive?

Clerk: - It's more expensive.

Geisa: - Who usually buys this or that one over there?

Clerk: - Usual buyers of this one, rarely buy the other kind.

Geisa: - Whos buys it salted? Is there a profile of those who buy "bacalhau"? Is ot usually madams? Youngsters? Elderly?

Clerk: - They're usually madams. Mainly Portuguese. Portuguese people only buy it with skin. Brazilians prefer it clean.

Geisa: - I got it. Cleaned and packed.

Clerk: - Yes

Geisa: - Thank you.



SP EMPORIUM SANTA MARIA

Geisa: - Could you tell me a bit about “bacalhau”, buddy? I want to understand the kinds, how I can choose.

Clerk: - This one here is Porto, which is the best “bacalhau”.

Geisa: - Where do they come from?

Clerk: - Portugal.

Geisa: - Ok. Is there only this kind of “bacalhau”? Are there others?

Clerk: - Many others. I don’t remember how it’s called because it has a different name, but there are several others, it just changes the place. This one here is one of the best, and we only sell it.

Geisa: - Oh, you only sell it?

Clerk: - This stand is for salt meat. The desalted one are sold frozen; Diaz is the brand. It’s also very good.

Geisa: - Diaz, is it a different brand?

Clerk: - Yes.

Geisa: - Do you sell “bacalhau” throughout the year or it’s better sold on special dates?

Clerk: - We sell it better at Holy Week and Christmas.

Geisa: - I see, but then you sell much more. How much more? Double, triple sales?

Clerk: - During the Holy Week we sell about 12-14 boxes.

Geisa: - And when it’s off season?

Clerk: - About 1.5 to 2 boxes.

Geisa: - Why do people consume it more during such periods? Do you think it’s a traditional issue?

Clerk: -

Geisa: - Tradition, ok, and you said that one is the best. But why do they cut it in stripes like that?

Clerk: - This one here is in shreds.

Geisa: - What can I do with the shreds?

Clerk: - Shreds are better for stuffing, salads. The other one is better for oven recipes.

Geisa: - Who are the usual buyers? What's their age range?



Clerk: - It's usually grown-up women.

Geisa: - I got it. Is it cheaper if it's torn in shreds? And if we want it clean, do you clean it?

Clerk: - Yes, when we clean it, we take the skin off, and now we cut the best parts.

Geisa: - Don't you have the whole fish?

Clerk: - We leave it in the box. If it's necessary, we promptly cut it and clean it.

Geisa: - People don't usually buy a whole fish? Just in pieces?

Clerk: - Nope, they don't usually a whole fish. It's easier to buy in pieces. It's easier to prepare, because it only has this central fish bone here. It's much easier. We choose only the best parts.

Geisa: - And a kilo costs R\$99?

Clerk: - Yes, R\$99

Geisa: - It is that Porto you said. How do you know you're choosing the best part? How should I choose it?

Clerk: - You have to observe this part and this front part here. This one here, for example, is good because when we're cleaning, we already pack it to sell.

Geisa: - But what would be the best?

Clerk: - Thicker parts, the meaty ones must call your attention.

Geisa: - I see. It costs R\$99. It keeps this price during the year or it goes up and down when it's Easter?

Clerk: - It's the same thing. When it's close to holidays, we expose it more during such holidays. We leave some on a stand; others on the counter.

Geisa: - If you put codfish refrigerated "bacalhau" on a stand, don't you think it can spoil?

Clerk: - Nope, because it's salted, so it doesn't spoil. But the pieces we put on a stand are not taken to the fridge.

Geisa: - Right, to avoid changing the temperature. But do you expose the packed ones or the whole fish?

Clerk: - They're packed. Our customers don't want trouble, so it's easier when they are already packed. They prefer buying it packed in trays. We don't even spread whole "bacalhau" around the store.

Geisa: - Great. Do you sell herring here? Or fresh sardine?

Clerk: - Nope. Not herring. We used to sell it canned, like olives.

Geisa: - How was it kept unspoiled?



Clerk: - It used to come in a liquid, in a jar just like the olive jars.

Geisa: - Where does herring come from?

Clerk: - I don't know.

Geisa: - It's ok. But the liquid kept the fish unspoiled? You didn't have it fresh?

Clerk: - It was the preservative.

Geisa: - Do you have sardines?

Clerk: - Only canned.

Geisa: - Thank you.



SP EXTRA PART 1 (Bacalhau)

Geisa: - Do you know about the kinds of "bacalhau"?

Clerk: - The best one is Porto. I have been working with it the past 3 months, and I learned it. So we have Porto, and steaks without fish bones. Nothing in the piece. It's Porto. And there are shreds, for baked "bacalhau" with vegetables. And there is Ling, Saithe, they are lower quality "bacalhau", if compared to Porto, that's why it's cheaper.

Geisa: - Ling, like BJ "bacalhau", what is BJ?

Clerk: - BJ stands for "bandeja" (tray). It's like "bacalhau", because only Porto is real "bacalhau". They are "bacalhau" but cannot be called so because only Porto can be tagged that way. Ling and Saithe are like "bacalhau", but they are not real "bacalhau". Only Porto and Porto imperial are "bacalhau".

Geisa: - What's the difference, then? Is it the price?

Clerk: - Those "bacalhau"-like are cheaper. Ling costs R\$ 21.90/kg. Saithe costs R\$15.90/kg.

Geisa: - Right. You said the best are...

Clerk: - Porto and Porto imperial. Porto imperial is this packed one here, R\$ 29.90. It's a bit more expensive. This one is the female fish. That's why it's called Porto imperial. It's a bit better than Porto, which is the male fish.

Geisa: - So, the female fish is better. So, this is Porto, the male fish. What's the difference between its price compared to the female?

Clerk: - R\$ 26.90 a pack.

Geisa: - If it's a steak? Does it cost the same?

Clerk: - Steaks are more expensive. Because they have a different cut. And it's cut here.

Geisa: - Is there any other difference besides the cut? Do you take any fish bones or skin off?

Clerk: - It has no fish bone. It's like chicken steaks: it's only meat.

Geisa: - I see. And the whole fish you mentioned, does it have fish bones?

Clerk: - It does. It's here. There's the tail too.

Geisa: - So you're always going to have a whole fish, steaks and shreds.

Clerk: - Exactly.

Geisa: - What am I going to use each for?



Clerk: - Well, shreds are better used for “bacalhau” with vegetables. And steaks people use when they don’t want to bother cleaning and cutting it.

Geisa: - What do people prefer?

Clerk: - People prefer shreds. There’s always a promotion of that, but it depends on the dish you intend to cook.

Geisa: - Do you sell it during the whole year?

Clerk: - Yes.

Geisa: - But there are times when you sell more, right?

Clerk: - We sell more at Holy Week and the end of the year.

Geisa: - Then sales double? Triple?

Clerk: - Yes.

Geisa: - Do you believe people are eating more or less “bacalhau”?

Clerk: - They eat more on special dates. A kilogram of Imperial usually costs R\$45 or R\$50 on season.

Geisa: - Wow, it’s double the price! But I meant the past 5 years now? Have people eaten more “bacalhau”?

Clerk: - At the end of the year, this store was the second in sales of “bacalhau” of Brazil. The second best in sales.

Geisa: - What are the “bacalhau” buyers’ like? Are they men, women, adults?

Clerk: - It’s usually women and older couples. About 40+.

Geisa: - How is this desalting thing?

Clerk: - You got to leave it in water for 48h, if want it totally desalted, or 24h, if you want it with some salt.

Geisa: - I got it, thanks.

SP EXTRA PART 2 “ARENQUE”

Geisa: - Do you have arenque? What’s the difference between arenque and sardine?

Clerk: - Common sardine?

Geisa: - Yes. Is there any difference?

Clerk: - The taste. Some say arenque has a stronger taste. Others say it's sardine. It’s the same thing.



Geisa: - What about the price? Is it the same?

Clerk: - Common sardine is cheaper. It can reach R\$ 2.95.

Geisa: - Where do they come from? Is it Brazilian?

Clerk: - Norway.

Geisa: - So, it's cheap.

Clerk: - We get it frozen.

Geisa: - How do you thaw it?

Clerk: - In the water. The frozen one comes in an industrial way, so you clean it frozen, then put it back in the pack again. After it thaws, you can't freeze it again. The fresh one comes not frozen.

Geisa: - Do they come from the same place? Both fresh and frozen fish, I mean.

Clerk: - Both come from Norway, but from 2 different companies.

Geisa: - But I can buy it fresh?

Clerk: - Yes. This one here is fresh.

Geisa: - Does it yield much? Like sardine?

Clerk: - When it's sardine season, people prefer sardines, but when there's less sardine available, people buy arenque. You can find it throughout the year. The national sardine disappears for some time.

Geisa: - I think not many people know sardines can be called arenque sardines. Do people order it using such name?

Clerk: - Yes. They order arenque, the national sardine or "laje".

Geisa: - Is there any kind of people who prefers arenque better than common sardine?

Clerk: - Nope. It's the same. Do you work for Nord?

Geisa: - I don't. It's for a college paper.

Clerk: - All classes because there no big difference between their prices. When there's no promotion, it costs R\$ 3.90 or R\$ 4. The other one costs R\$ 4.15; it's not very different.

Geisa: - Ok, thanks.



SP PÃO DE AÇUCAR – PART 1 BACALHAU

Geisa: - Could you explain to me a bit about the kinds of “bacalhau”?

Clerk: - It comes from Norway, in boxes, and we cut it into pieces or shreds.

Geisa: - This one here is in pieces. What’s the difference from shreds?

Clerk: - We clean it and tear into shreds. It’s like chicken shreds, like this. No skin, no fish bones, nothing.

Geisa: - This “bacalhau” is Porto. Are there others?

Clerk: - We have imperial too. We usually call it Porto imperial.

Geisa: - What’s this “band” thing here? Imperial “band”?

Clerk: - It’s “bandeja” (tray).

Clerk 2: - Good morning!

Geisa: - I want to know what kinds of "bacalhau" you have. How do I know which I should choose?

Clerk 2: - I’ll help you out. Here we go. I have extra-clean "bacalhau", with no skin, fish bones. It’s very practical and you’ll use 100% of the product. No losses. We work with this traditional Porto, Gadus Macrocephalus, but they have skin and fish bones. Depending on your recipes, you won't have problems with it. If you want it grilled, it's better to keep the skin. It helps keeping the fish together, avoiding breaking it off. There’s Gadus Morhua, which is a genuine imperial... this one here. It’s the best “bacalhau”. It breaks off more easily. Those bubbles open very easily. That’s the best we can offer our client.

Geisa: - So you have imperial, which is Macrocephalus and Porto, which is Gadus Morhua.

Clerk 2: - Gadus Morhua. This is Macrocephalus, the traditional one. This one is the same Macrocephalus extra clean.

Geisa: - Have you skinned it?

Clerk 2: - Yes. No skin, no fish bones. Nothing. If you are in a hurry or want to serve children, it's easier. As it is practical, we sell it a lot.

Geisa: - Macrocephalus extra-clean. You said Morhua is the best. Don’t you have it extra-clean?

Clerk: - We don’t have it.

Geisa: - Extra-clean means it has no skin?

Clerk 2: - Neither skin nor fish bone or bones.

Geisa: - I see. And you only sell it packed?



Clerk 2: - I have the whole Ling and Morhua. You can buy half, if you like.

Geisa: - What are the most sold cuts?

Clerk 2: - We sell loins petty well. We don't have any here today because we sold it this week. It is the core of the fish. It sells a lot. We also sell it on Saturdays, because it's easy to cook a special lunch with that. There is the steak, but it's better to buy the extra-clean. And there is this part of the loin that we cut thinner slices, like this.

Geisa: - Isn't it pieces?

Clerk 2: - Nope. It's the first part of the loin, it's thinner, that's why we cut it in slices.

Geisa: - What about this one? They are pieces but not from loin?

Clerk 2: - It's not. Those pieces are Gadus Macrocephalus, without fish bones, making your job easier. Why is it cheaper? Because it's a smaller fish, that's why it's thin and its pieces are very thin. So it's cheaper than loin.

Geisa: - What should I buy pieces for? What kind of dishes can I cook with it?

Clerk 2: - For "bacalhau" balls. For "bacalhau" with vegetables, you'll need to tear it into shreds, so it's easier. You won't need to skin it, take fish bones off... To prepare salads too.

Geisa: - So this imperial, Gadus Morhua, is the most expensive. Then Macrocephalus comes, and it can be extra-clean and it costs more, or with skin.

Clerk 2: - Exactly.

Geisa: - It is the same fish. It is this very same Macrocephalus you're selling in pieces, but it's cheaper because it comes from a smaller fish.

Clerk 2: - Exactly.

Geisa: - Where does this "bacalhau" come from?

Clerk 2: - Norway, all of them.

Geisa: - You only sell this brand. Is it yours, or it's a common brand?

Clerk 2: - I don't remember its name now. But they come from Norway.

Geisa: - What about Porto "bacalhau"? And this label? Is it yours?

Clerk 2: - This label helps clients in identifying the product. Sometimes it brings some hints for desalting.

Geisa: - I got it. Do you have it during the whole year?



Clerk 2: - We sell "bacalhau" the whole year. We work a bit harder when it's on season, at the end of the year and Easter.

Geisa: - What difference it makes?

Clerk 2: - Because people demands much more.

Geisa: - How much more do you sell?

Clerk 2: - I don't have precise numbers, but I guess we sell about 300kg.

Geisa: - In a regular month.

Clerk 2: - Yes, about 300kg in a regular month. When it's season, it reaches one ton. The demand increases because everyone wants to eat something different. Now, it changed. People are often eating "bacalhau". We sell it every day.

Geisa: - Do you think people eat more "bacalhau" now?

Clerk 2: - It increases year after year. We are concerned if this demand increases in such way that the fish become extinct. I don't believe it, but the demand increases every year. It used to be made on special dates. Now it is a different dish you cook on weekends. Anyway, it's being eaten more often.

Geisa: - Do you think the price kept the same or it changed because people are eating more "bacalhau"?

Clerk 2: - Price changed a bit, but it's now more affordable. On such periods of greater sales, we manage to have better prices, if we order it in advance.

Geisa: - This is all salt "bacalhau". Do you have it frozen?

Clerk 2: - Yes, we have it frozen, but it stays in the fishery area. It's already desalted there. Desalted loin.

Geisa: - Which sells best?

Clerk 2: - The salted one.

Geisa: - But the other is more expensive, isn't it?

Clerk 2: - Well, the prices I saw were very similar, but the frozen was a bit more expensive.

Geisa: - Why do you think people prefer the salt "bacalhau"?

Clerk 2: - I believe it happens because it loses flavor. The frozen "bacalhau" doesn't have the same color; it's not as delicious as the salt one. And I think salted is fresher than the frozen. It may be frozen for a long time.

Geisa: - Is there a profile of the consumer? Does it tend to be bought by women? Men? Youngsters? Old people?



Clerk 2: - Women usually buy more. They come very often. Older ladies usually come and choose some "bacalhau" for making balls. They like "bacalhau" balls or salad. They always come. It's good-looking, it's practical. They take it packed.

Geisa: - When it's party time, does this profile change?

Clerk 2: - Everybody comes. Everybody buys it. Young people come, everyone.

Geisa: - It's great, thanks. I'm not so lost anymore. I want to learn more to consume it better.

Clerk 2: - Not to mention it's a very healthy fish. It has Omega3, which is good for memory. One kg of "bacalhau" equals to 3kg of other fish, concerning vitamins and Omega3. During Easter season, we give leaflets with this kind of information. We also show our product better, in order to catch the client's eye.

Geisa: - Thank you.

SP PÃO DE AÇUCAR – PART 1 ARENQUE

Geisa: - Do you have "arenque"?

Clerk: - We do.

Geisa: - Do you have it here or it's packed?

Clerk: - Packed only.

Geisa: - But isn't it frozen?

Clerk 2: - Yes, it's frozen.

Geisa: - How do you thaw it?

Clerk 2: - We actually thaw it in our central depot and they send it refrigerated to me.

Geisa: - They send it packed or you pack it here?

Clerk 2: - We pack it here.

Geisa: - Where does this "arenque" come from?

Clerk 2: - "Arenque" comes from Norway.

Geisa: - But it's similar to sardine, isn't it?

Clerk 2: - Their tastes are very different.

Geisa: - Do you have a good demand for "arenque"?

Clerk 2: - Yes, we sell a lot.



Geisa: - But not as much as sardine?

Clerk 2: - Maybe more than sardine.

Geisa: - Maybe more than sardine, ok. Which public usually buys “arenque”?

Clerk 2: - Usually lower middle class. Because it’s cheap.

Geisa: - Because the pack is R\$ 3. But do people know it? Because I've never heard of it...

Clerk 2: - Most of people know it.

Geisa: - What is this CAB sign on sardine and “arenque” What is it?

Clerk 2: - Let me see it.

Geisa: - Do you see it here? It says sardine, “arenque” “s/ cab”.

Clerk 2: - It means “headless”.

Geisa: - Oh, headless. Thank you.



SP WALMART

Geisa: - Do you have herring?

Clerk: - We don't work with herring.

Geisa: - But do you know what it is?

Clerk: - I do, but we don't sell it here.

Geisa: - Can you help me with the "bacalhau"?

Clerk: - Salt "bacalhau"?

Geisa: - Yes, I want to understand the differences between them. What kinds of "bacalhau" do you sell?

Clerk: - Only 2, Zarbo and Ling. This is "bacalhau"-like. It's not "bacalhau". It's a kind of fish that is processed with salt.

Geisa: - So it's cheaper. What are the differences between them?

Clerk: - Ling is a bit bitter and darker.

Geisa: - That dark one there is Ling?

Clerk: - Yes.

Geisa: - You just sell these two kinds?

Clerk: - Yes.

Geisa: - Do they come all packed or I can buy the whole fish?

Clerk: - No, you can buy in bulk too. The National Health Surveillance Agency forbids it.

Geisa: - Do you always sell it with skin?

Clerk: - Always. We sell Porto, which is "bacalhau" steaks, without skin. But we don't have it at the moment.

Geisa: - Do you sell "bacalhau" during the whole year? But you only have Porto at the end of the year?

Clerk: - No. We sell imported products and our distribution center, Cedex, doesn't have any "bacalhau" available.

Geisa: - I got it. It's not a matter of season, it's because you are simply out of goods.

Clerk: - Yes. There's no such thing as "bacalhau" season.

Geisa: - But there are times when the demand increases, right?



Clerk: - Yes. At the end of the year and Holy Week the demand increases a lot, but you may find it throughout the year.

Geisa: - Does the demand increase that much? Do you offer other kinds of cut?

Clerk: - We usually work with shreds and steaks.

Geisa: - How can I identify Porto, which everybody says it's better?

Clerk: - Porto is usually this thick.

Geisa: - It's thicker, then.

Clerk: - This part is usually very white and it breaks into pieces after cooking.

Geisa: - How do I know which recipe I can make with each kind of "bacalhau", rather than choosing it only by the price?

Clerk: - It can be used in any and all recipes. Because this kind of "bacalhau" (...). Come here.

Geisa: - I want to know which kinds of "bacalhau" can be used in each recipe.

Clerk 2: - Actual "bacalhau" are Porto, and Porto imperial, which are the best. Zarbo and Ling are lower quality ones; Saithe is a salt fish, it's not "bacalhau".

Geisa: - Saithe is not "bacalhau". Are Ling and Zarbo "bacalhau" then?

Clerk 2: - They're from the "bacalhau" family.

Geisa: - For cooking, can I see the difference, if I use any of these?

Clerk 2: - Zarbo is similar in taste.

Geisa: - Zarbo. What can I make but "bacalhau" balls?

Clerk 2: - For "bacalhau" balls, these are the best. Because you neither feel a strong taste nor see the color. But if plan cooking some oven recipe or salad, you'd better use Porto.

Geisa: - Thank you.

Vedlegg 2:

Fokusgrupper, (noe redusert) norsk versjon

Fokusgrupper, engelsk versjon

Fokusgrupper i portugisisk versjon kan fås ved henvendelse til forfatteren

Bacalhau em Brasil

Fokusgrupper i Brasil: Kunnskaper om klippfisk

Nofima Marked, Tromsø, våren 2010

En mer utførlig versjon av denne presentasjonen finnes på engelsk



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Kontakt: 0201 2 1201

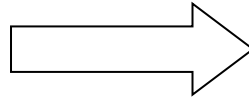
I – Målsetting

Å få en bredere/dypere forståelse av kunnskapsnivået til brasilianske forbrukere som regelmessig kjøper og spiser klippfisk

II – Metode og utvalg

Det ble gjennomført fokusgrupper i disse byene:

I tabeller senere i dokumentet refereres det til disse byene



Cities	Number of Groups	
	C Class	A/B Class
São Paulo	2	2
Rio de Janeiro	2	2
Belo Horizonte	1	1
Brasília	1	1
Salvador	1	1
Recife	1	1
Total	8	8

III – Rekrutteringsfilter

- ❖ Kvinner og menn (stor overvekt av kvinner)
- ❖ 25 - 70 år
- ❖ Hadde kjøpt klippfisk minst en gang etter november 2009
- ❖ Hadde hatt ansvaret for tillagingen, enten selv eller sammen med andre
- ❖ Tilhørte sosial klasse A,B og C. A og B ble slått sammen i egne grupper. C ble kjørt for seg.

IV – Gruppenes deltagere og deres profil

Belo Horizonte	Rio de Janeiro		Recife
<p><u>Group 1 – C Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 28 to 55 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers <p><u>Group 2 – A/B Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 26 to 59 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers 	<p><u>Group 1 – A/B Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 48 to 58 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers <p><u>Group 2 – A/B Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 26 to 42 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers 	<p><u>Group 3 – C Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 47 to 69 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers <p><u>Group 4 – C Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 28 to 45 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers 	<p><u>Group 1 – C Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 10 people <input type="checkbox"/> From 33 to 66 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers <p><u>Group 2 – A/B Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 10 people <input type="checkbox"/> From 28 to 57 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers
Brasília	São Paulo		Salvador
<p><u>Group 1 – C Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 27 to 64 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers <p><u>Group 2 – A/B Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 27 to 47 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers 	<p><u>Group 1 – A/B Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 49 to 59 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers <p><u>Group 2 – A/B Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 26 to 45 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers 	<p><u>Group 3 – C Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 46 to 68 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers <p><u>Group 4 – C Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 8 people <input type="checkbox"/> From 26 to 43 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers 	<p><u>Group 1 – C Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 9 people <input type="checkbox"/> From 25 to 51 years-old <input type="checkbox"/> 8 women and 1 man <input type="checkbox"/> All are decision makers <p><u>Group 2 – A/B Class</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> 10 people <input type="checkbox"/> From 25 to 56 years-old <input type="checkbox"/> 8 women and 2 men <input type="checkbox"/> All are decision makers



V – FUNN



V.1 – Første del

V.1.1 – Assosiasjoner

Assosiasjoner og tanker rundt klippfisk synes å være uavhengig av sosial klasse, alder eller by. Når man tenker på klippfisk er det første som dukker opp retter/oppskrifter (bolinhos, bacalhau com ocras etc). Deretter tenker man på anledninger som jul, nyttår og påske eller ulike mer formelle tilstelninger i familiære sammenhenger. Noen hadde også spontane assosiasjoner relatert til Portugal, oliven, olivenolje og Skol (en øltype)

“Når jeg tenker på klippfisk, tenker jeg på Portugal. Dette skyldes at her i Belo Horizonte er de fleste restaurantene som serverer klippfisk, er portugisiske” (kvinne, Klasse C, 32 år, Belo Horizonte)

“Jeg kan ikke tenke på klippfisk uten samtidig å tenke på en god olivenolje” (kvinne, klasse A/B, 45 år, Belo Horizonte)

“Når jeg tenker på klippfisk tenker jeg: Dyrt! Derfor spiser vi det bare to ganger i året” (kvinne, klasse C, 31 år, Brasília)

“Jeg lurer fælt på hva bacalhau egentlig er. Jeg har prøvd å søke på internett uten å finne noe om dette” (kvinne, klasse C, 39 år, Recife)

“Alle liker klippfisk, store spm små” (kvinne, 30 år, klasse A/B, Rio de Janeiro)

“Det er en dyr fisk, så den må lages til t større selskap” (kvinne, 51 år, klasse A/B, Brasília)

“Det er en dyr fisk og egner seg best til spesielle anledninger” (kvinne, 28 år, klasse C, Rio de Janeiro)

“Det minner meg om min barndom. Mine foreldre hadde en restaurant hvor de serverte klippfisk og jeg spiste masse” (kvinne, 38 år, klasse A/B, Salvador)

“Jeg husker noen eldre, avdøde slektninger fordi de likte det svært godt” (kvinne 41 år, klasse A/B, Brasília)

“Det er en fisk som kommer fra kalde farvann. Derfor må den saltes for å kunne bli bevart” (kvinne, 49 år, klasse A/B, Salvador)

“Når jeg tenker på klippfisk, tenker jeg først på hvor vanskelig det er å finne en oppskrift som alle liker” (kvinne, 59 år, klasse A/B, São Paulo)

“Klippfisk er noe man serverer familien” (kvinne, 42 år, klasse C, Rio de Janeiro)

Disse ordene/begrepene er de som først dukket opp når de ble bedt om tenke på klippfisk.
Ordene/begrepene er sortert på klasse_

Klasse A/B

Påske
Nyttår/Jul
Spesielle anledninger
Olivenolje
Oliven
Ikke helt sikker på hva klippfisk er
En tørket og saltet fisk
Portugisisk mat
Som cação (en liten haiart)
En annerledes rett
Salpicão (en rett)
Tradisjon
Familiesammenkomster
Sofistikert
Man samler mange folk
Party/fest
Barndom
Spesiell smak/aroma
Spesiell tekstur, egenartet smak
Brand eller type
Spesiell lukt
Sterk lukt og salt
Dess hvitere dess bedre kvalitet
Vanskelig å velge oppskrift
Mange måter å lage til
Næringsrik

Klasse C

Fisk
Påske
Bolinhos
Suflé
Bacalhau med okra
Salat
Potet salat
Skol (Brasiliansk øl)
Nyttår/Jul
Caruru med bacalhau (rett fra Bahia)
"Beautiful rett"
Portugal
Bacalhau lagd i ovnen
Smakfull
Dyr
Familie
Porto
Utvanning
Pai



V.1.2 – Hvor kommer klippfisken fra?

De fleste sa **Noruega og Portugal**. De sa også at klippfisk kommer fra kalde farvann (águas frias). En person mente at klippfisk kom fra Chile og flere sa at de ikke visste. Ingen systematiske forskjeller i svarene mellom byer, klasser eller alder.

- ❖ Porto og Saithe nevnes i alle gruppene. I noen grupper, og av færre personer, ble også Ling and Zarbo nevnt. Ling og Zarbo ble ikke nevnt i Belo Horizonte, Salvador or Recife.
- ❖ Noen synes å forveksle type med stykninger. De oppfatter “bacalhau desfiado” (opprevet klippfisk) og “bacalhau em lascas” (oppkuttete mindre biter) som om de er typer av klippfisk.
- ❖ I São Paulo, Belo Horizonte og Salvador, ble “Bacalhau da Noruega” omtalt som en type klippfisk av noen deltagere
- ❖ “Imperial” ble oppfattet å være en type klippfisk i Rio de Janeiro
- ❖ “Mulato Velho” blir nevnt som bacalhau i Rio de Janeiro. Dette er malle(?) (ferskvannsfisk som lokalt kalles bagre) som er saltet og tørket(?) I Belo Horizonte er “Baiacú”, også en saltet ferskvannsfisk (fra Amazonas) omtalt som “Bacalhau Brasileiro”.
- ❖ Klippfisknavnene oppfattes også som merkenavn/brands. Særlig i gruppene i São Paulo var dette tydelig. Saithe, Porto, Zarbo og Ling er klippfisk “brands”!
- ❖ Noen få deltagere skilte bare på lys (claro) og mørk (escuro) klippfisk

V.1.3 – Klippfisktyper

Porto
Saithe
Ling
Zarbo
Noruega
Imperial
Den mørkeste
Den lyseste

“There is the lascas type too, we already buy it on trays, you can find it in Extra” (woman, C class, 45 years-old, Brasília)

“I know Porto type, this is exactly the Portuguese one” (woman, C class, 33 years-old, Brasília)

“There is the desfiado type too, (...). There is the fillet type too. (woman, C class, 53 years-old, Recife)

Beskrivelser, assosiasjoner og forskjeller mellom de ulike typene klippfisk

- ❖ De fleste deltagerne oppfattet at "Saithe" er den tynneste, mørkeste og billigste klippfisken. "Porto" er den lyseste/hviteste, tjukkeste og dyreste. Svært få av deltagerne hadde klare oppfatninger av "Zarbo" og "Ling", men de som hadde syntes at "Zarbo" hadde et bedre "image" enn "Saithe", dog dårligere enn "Porto". Noen deltagere i São Paulo sa at "Ling" var en tynn (fino) fisk.
- ❖ Porto ble alltid assosiert med å være den beste av all klippfisk.
- ❖ Oppfattet forskjell mellom typene går primært på farge og tjukkelse, sekundært på smak og anvendelse (oppskrifter).
- ❖ Noen mente at "Saithe" var best egnet til bolinhos mens "Porto" var best for salater eller retter som bakes i ovn.

Assosiasjoner "Porto" versus "Saithe"

Porto:

Hvitere/lysere (mais claro)
 Bedre (melhor)
 Tjukkere (Mais grosso/espesso)
 Mykere (mais macio)
 Uten bein (não tem espinhas)
 Dyrere (mais caro)
 Kan anvendes som filet (pode ser usado para filè)

Saithe:

Mørkere (mais escuro)
 Tynnere (mais fino)
 Med bein (com espinhas)
 Billigere (mais barato)
 Er saltere (tem mais sal)
 Smaker også godt (também é saboroso)
 Har mer/tjukkere skinn (tem mais pele)

V.1.4 – Hverdag kontra spesielle anledninger

Uavhengig av by, klasse og alder var man enige om at klippfisk ble oftest brukt ved høytider som påske, jul og nyttår. Det var også en del som sa at morsdag, gebursdager og søndager var egnede anledninger.

Klasse A/B synes å ha en noe høyere kjøps- og spisefrekvens enn klasse C, særlig utenom de "mulighetene" som er nevnt over. Særlig tydelig var dette i Rio de Janeiro and Brasilia.

Tradisjon er en meget viktig faktor. Både fordi det er en tradisjon å spise klippfisk ved de anledningene nevnt over, og fordi det er tradisjon å ikke spise det utenom de samme anledningene. Noen syntes at tilberedningen, inklusive utvanningen var for tidkrevende.

De fleste sa at prisen var hovedårsaken til at de ikke spiste det oftere. Dette gjaldt uavhengig av sosial klasse.

Viktige anledninger

Primære:

Påske

Jul

Nyttår

Sekundære:

Morsdag

Bursdag

Søndag

Viktigste hinder for økt konsum

Pris

Tradisjon

Vanskelig og tidkrevende tillaging

V.2 – Informasjon

V.2.1 – Informasjon brukt når man kjøper klippfisk (POS = point of sale)

Når man vurderte klippfisk sa de fleste at farge (dess lysere dess bedre), tjukkelse (dess tjukkere dess bedre), stykninger og pris var de viktigste holdepunktene. Heller ikke her var det skille mellom byer, alder eller sosial klasse. I tillegg nevnte de følgende:

1. Kvalitet: Syntes synonymt med hvit/lys farge og tjukkelse (*cor branca e espessura grossa*)
2. Stykninger: Noen foretrekker å kjøpe brettpakket stykker fordi det var mest praktisk. Andre sa at de ikke kjøpte brettpakket fordi kunne bli lurt. Man la alltid de beste bitene øverst/mest synlig. Atter andre kjøpte hel fisk og fikk den kuttet opp etter ønske
3. Stykninger: Ulike produkttyper brukes ulikt. "Desfiado" og "lascas" brukes til bolinhos. "Lombo" brukes til ovsnretter. Hale og utskårede/fjernede bein har ingen anvendelse
4. Farge: Fiskekjøttet skal være så lyst/hvitt som mulig (*a mais branca possível*).
5. Tykkelse: Fiskekjøttet skal være så tjukt som mulig (*o mais espessa/grossura possível*)
6. Tørrhetsgrad (Secura): Fisken skal være tørr. Ser man fuktighet er dette grunn til ikke å kjøpe, primært fordi man ikke vil betale for det ekstra vannet
7. Skinn: Noen sa at dersom skinnet "slapp" kjøttet, var det tegn på en god klippfisk (nevnt i Brasilia)

9. Salt: Klippfisker må ha synlig salt for å vise at den er konservert. For mye salt indikere en hard og altfor tørr fisk og det var ikke et godt tegn
10. Fast: Klippfisker måtte være fast (*firme/firmeza*)
11. Tekstur: Dette var noe som flere nevnte, men det var uklart hva de la i begrepet
12. Type klippfisk: Noen sa at de tidligere nevnte forskjellene mellom "Saithe" og "Porto" var det de brukte for å velge. Dette hang også sammen med hva man skulle lage. Flere sa at "Porto" var drøyere (*rende mais*) enn Saithe
13. Lukt: Hvis den lukter for sterkt og særlig hvis den lukter harskt, unngår man å kjøpe.
14. Faller fra hverandre: Hvis fisken faller fra hverandre, er den uegnet til å spises. Dette ble testet ved å "nevle" på fisken.
15. "Ferskhet": Når klippfisker ligger i diskene, oppfattes den som ferskere/nyere. Dette var viktig for noen
16. Utseende/Skjønnhet: Noen brukte uttrykket "*a aparência e a beleza*" når de valgte fisk. Dette synes å være en annen måte å si at fargen, tjukkelsen og fastheten var riktig
17. Fargeflekker: Noen hadde aversjoner mot brune flekker. Slik fisk ble ikke kjøpt.
18. Juks: Flere sa at de sjekket at klippfisker var ekte klippfisk og ikke et annet produkt. Det var uklart hvordan de gjorde dette, men se på skinnen, lukte, sjekke teksten og smake var ting som ble nevnt.
19. "Best før dato": Klippfiskerprodukter pakket å brett er gjerne påført en "best før dato". Denne var viktig å sjekke for noen.
20. Pris: Selv om de var svært interessert i å handle "på tilbud" og at en generelt lavere pris ville medføre økt konsum, var mange klare på at "Porto" ikke måtte bli for billig. Dette ville være mistenkelig
21. Hygiene: 2 grupper, en fra São Paulo og en fra Belo Horizonte sa at det var viktig for dem at utsalgsstedet var reint. De var særlig opptatt av at fisken ikke skulle være befengt/omgitt av insekter.

V.2.2 – Informasjonskilder

Hvor og hvordan man velger klippfisk er en type kunnskap som de fleste oppgir at er overlevert fra mor.

I tillegg sier deltagerne at de har lært av ektemake, venner, svigermor og gjennom egen erfaring. Det ble også nevnt TV-programmer med Ana Maria Braga, Edu Guedes og Ana Rickman (alle har matprogrammer), ulike typer bøker, blader, internett, ved å handle i spesialbutikker og på restaurant. 2 av deltagerne hadde faktisk jobbet på restaurant. PROCON, det brasilianske Forbrukerrådet var også nevnt som kilde til informasjon. I São Paulo hadde noen begynt å kjøpe "merkeklippfisk" og mente at de dermed fikk en garanti for at klippfisken var god.

Kvalitet og kvalitetsvurdering er den viktigste lærdommen i tillegg til ulike måter å lage til klippfisk på. Som tidligere nevnt er tjukkelse og farge de viktigste attributtene når man skal velge, men det tas også hensyn til hva fisken skal brukes til. Tjukkelse på fisken blir også brukt som "signal/argument" avhengig av hvor mange "som kommer til middag". Tjukkere fisk oppfattes å være mer økonomisk i den forstand at den er drygere/drøyere (*rende mais*).

De kunnskapskildene som er nevnt over, er også de som har lært deltagerne om utvanningen (selv om akkurat dette punktet ikke hadde betydning for kjøpsprosessen)

V.3 – Utslagssteder for klippfisk

V.3.1 – Hvor kjøpes klippfisk

Bacalhau kjøpes i **supermarkeder** av de aller fleste deltagerne. Grunnene til dette oppgis å være:

1. Det er mest praktisk å kjøpe der man kjøper det meste av sine andre dagligvarer
2. Det er alltid et supermarked i nærheten
3. Supermarkeder oppfattes å være reinere enn messer/markeder
4. Bacalhau er tilgjengelig i supermarkedene hele året.
5. Supermarkedene har ofte god nok produktbredde
6. Supermarkeder har større tillit
7. Produktene har hurtigere rotasjonstid i supermarkedene
8. Det er større muligheter for "gode tilbud" i supermarkedene.

Hvis det finnes et noenlunde renommert marked (som i São Paulo og Belo Horizonte) sier noen at de foretrekker å handle klippfisk der fordi:

1. Man kan velge ut spesielle/de beste stykkene. Betjeningen kutter alltid slik man vil.
2. De som står bak disken er gjerne "service minded" og har gode kunnskaper om klippfisk
3. Noen oppfatter det er på disse markedene man finner den beste kvaliteten
4. São Paulo's Mercadão oppfattes i tillegg til god kvalitet også å være under god offentlig kontroll. Mange restauranter i SP kjøper visstnok klippfisken på/gjennom dette markedet.

I Brasília og i Rio de Janeiro finnes det spesialbutikker, gjerne kalt emporiums. Mange av disse fører et eksklusivt utvalg av mat og drikke. I Rio de Janeiro finnes også "Casa Pedro", en kjede med butikker som fører tradisjonelle saltede og hermetiske produkter, noe frukt/grønt og klippfisk.

Det synes som om disse utslagsstedene (naturlig nok) i større grad frekventeres av A/B enn C



Nordøst i Brasil finnes det få permanente markeder under tak, der er markedene ute. Dette gjelder også i Recife og Salvador. Deltagerne fra disse byene forbinder disse utsalgsstedene med skitt og dårlig hygiene. Klippfisken som selges er gjerne omgitt av insekter.

In Rio de Janeiro finnes det også mobile salgsenheter, dvs salg fra trillevogner. Dette skjer helst i sentrale deler av byen i tilknytning til jul og påske. Alle deltagerne i Rio sa at de kjente til dette, men erfaringene varierte fra "har kjøpt og funnet kvaliteten til å være helt OK" til "jeg er skeptisk til hvorvidt de har tilfredsstillende hygiene". I tillegg finnes det selgere som, etter å ha innhentet tillatelse fra arbeidsgiveren, selger klippfisk på diverse arbeidsplasser. Dette skjer også mest i tilknytning til nevnte høytider.

Under listes de utslagsstedene som deltagerne nevnte:

	Supermarkeder	Offentlige markeder	Spesialforretninger/ Emporiums
Belo Horizonte	Supermarkeder generelt	Mercado Central	
Brasília	Carrefour, Extra, Pão de Açúcar, Comper, Cativo		Mercado Municipal
Rio de Janeiro	Mundial, Princesa, Guanabara, Carefour, Prezunic, Sendas		Casa Pedro
São Paulo	Carrefour, Extra	Mercado Municipal / Mercado	
Recife	Hiper, Bom Preço	Salty Fairs	
Salvador	Bom Preço	Ceasa Rio Vermelho	

V.3.2 – Informasjon på utsalgsstedet

- ❖ De fleste oppfattet at den eneste typen informasjon som fulgte klippfiskene var vekt og pris. I særlig grad gjaldt dette supermarkedene hvor de fleste gjør sine innkjøp.
- ❖ I noen tilfeller finner de informasjon om klippfisktype, evt merke/brand og holdbarhetsdato(!)
- ❖ Alle sa at reklamebrosjyrer ble brukt og var tilgjengelig i alle supermarkeder. Hvis det var kampanjer på klippfisk (som oftest tilbud), hendte det at brosjyrene inneholdt serveringstips.
- ❖ Noen mente å ha sett ”sjokkpromosjon” på pris, oftest presentert av en person som går rundt i supermarkedet og stimulerer salget ved å snakke i mikrofon.
- ❖ Noen få i Recife og Salvador hadde opplevd promosjonsaktiviteter med smaksprøver i supermarkedene.
- ❖ Når det gjaldt informasjonstilgangen på markedene, var den generelle oppfatningen at heller ikke her var det særlig annet enn pris som ble opplyst.

Oppsummert ble følgende ting nevnt når de ble spurt om informasjon tilknyttet salg av klippfisk

- ❖ Pris
- ❖ Vekt
- ❖ Holdbarhetsdato
- ❖ Reklamebrosjyrer med pristilbud og oppskrifter
- ❖ Smaksprøver
- ❖ Merkevarer
- ❖ Opprinnelse (nevnt av svært få)

V.3.3 – Brands/merkevarer

❖ Det var kun et fåtall deltagere i Rio de Janeiro som hadde kunnskaper om merkevarer av klippfisk. Alle refererte i tillegg til frysede (og utvannede) produkter. Følgende merkevarer ble nevnt: **Lidador**, **Rosa Alves** (som vi antar er det portugisiske “**Riber Alves**”) og **Ricca**. Det sistnevnte har vi selv ikke observert og vet derfor ikke om dette produktet finnes. Noen nevnte også “Noruega”, men de var usikre på om dette var en merkevare eller ikke. Ingen nevnte “Norge”.

“I have seen “Lidador” and “Rosa Alves” brands on packs of bacalhau in the supermarket” (woman, A/B class, Rio de Janeiro, 51 years-old)

“They have info of brands too, I’ve seen brand Rica there, my mother-in-law was with me” (woman, C class, Rio de Janeiro, 38 years-old)



V.3.4 – Hjelp fra betjeningen

- ❖ Det generelle inntrykket hos deltagerne var at det ikke finnes personale i supermarkedene som har kunnskaper om klippfisk. Et unntak var i Recife hvor et par av deltagerne hadde hatt gode erfaringer.
- ❖ På markedene var inntrykket at bodeierne var mer profesjonelle/spesialiserte
- ❖ Et par sa at de hadde truffet "promotorer" for klippfisk i supermarkedene, men de uttrykte samtidig tvil om disse promotorene faktisk visste noe om klippfisk eller ikke

V.3.5 –Hvor finnes klippfisk i supermarkedet?

Klippfisk synes plassert noenlunde likt i alle supermarkedene. På markedene finnes de gjerne i egne boder. Hos Casa Pedro (i Rio de Janeiro) settes klippfisken utenfor butikken, på fortauet.

Klippfisk finnes gjerne i tilknytning til:

- ❖ Røkte og saltede produkter (bacon, tørka kjøtt, pølser, tørkede reker etc)
- ❖ Nær kjøttavdelingen (hvis de ikke har fersk fisk)
- ❖ Nær ost og oppskjært pålegg
- ❖ Nær matvarer som brukes til "feijoada" (brasiliansk nasjonalrett med utgangspunkt i svarte bønner)
- ❖ Nær ferskfiskdisken



Mange av deltagerne presiserte at klippfisk ble "løftet" fram i forbindelse med Jul, Nyttår og Påske.

Klippfisk ble av flere også assosiert med

Olivenolsje, oliven og poteter

Kokksomelk

Paprika/pepper

V.4 – Reklame og informasjon gjennom media

- ❖ Deltagerne hadde inntrykk av at det fantes svært lite reklame for klippfisk i media
- ❖ Til jul, nyttår og påske mente noen å ha sett reklame for klippfisk (noen mente på TV/magasiner, andre mente utvendige "boards"). Budskapet var tilbud på klippfisk i supermarkedet
- ❖ I noen byer var det restauranter som reklamerte med klippfisk for å tiltrekke seg spisegjester.
- ❖ Enkelt deltager i Recife, Rio og São Paulo sa at de hadde sett reklame for "Bacalhau da Nouega" på TV, men de husket ikke hva innholdet var. Det lille som var observert av reklame/promosjon var uansett for supermarkeder/restauranter, ikke for distributører/merkevarer.
- ❖ Reklamen som ble observert i media var antatt å bli vist på TV-kanalen Globo eller i magasinene "Contigo", "Caras", "Veja"
- ❖ En deltager fra Brasília hadde hørt promosjon for klippfisk fra bil med høyttaler som kjører rundt og promoterer ulike produkter og evenementer
- ❖ Deltagerne mente at hvis det ble reklamert mer for klippfisk, ville konsumet gå opp.



V.5 – Mangel på informasjon

- ❖ Ønske om mer informasjon, ble etterspurt av de fleste. Særlig gjaldt dette hvor klippfisken kom fra, "holdbarhetsdatoen", forskjell på ulike typer klippfisk, salting og utvanning, prising, lagring og farge.
- ❖ I 10 av de 16 gruppene ønsket man mer informasjon om hvor fisken kom fra og historie rundt klippfisk. I 9 grupper ble det uttrykt irritasjon over manglende produksjonsdato og holdbarhetsdato. I 4 grupper etterlyste man informasjon om hvordan man lagde klippfisk.
- ❖ Mange deltagere uttrykte skepsis til saltet i og på overflaten inkludert det høye saltinnholdet generelt. Hvorfor var klippfisken så salt? Dette og nødvendigheten av utvanning ble tatt opp i 6 av gruppene. I et tilsvarende antall gruppe ble det etterlyst mer informasjon om tilberedning.
- ❖ Noen deltagere i 4 av gruppene ønsket mer informasjon om de ulike fiskeslagene som ble brukt til klippfiskproduksjon. De oppfattet at bacalhau ikke var navnet på fisken som ble brukt, mao at man kunne bruke mange typer fisk til å lage bacalhau
- ❖ Forvirring rundt hva som var typer og merker etc var ganske åpenbar hos noen av deltagerne
- ❖ Informasjon om klippfiskens gode/mindre gode sider relatert til helse var også etterlyst. Likeledes næringsinnholdet.
- ❖ Noen var usikre på dette med lagring av klippfisk hjemme. De samme sa at de var nysgjerrige på hvorfor fargen var så ulik.
- ❖ Noen ønsket å vite hvem produsenten var og også mer om hvordan man skal velge riktig. En person etterlyste en kontakttelefon på pakningene. Ytterligere en mente man burde innføre et kvalitetsmerke for den beste fisken
- ❖ På neste side er funnene oppsummert. I øverste rad finner man forkortelser for de byene som undersøkelsen ble gjennomført i (se tidligere i dokumentet) samt hvilken sosial klasse deltagerne tilhører (dessverre må vi gjengi tabellen på engelsk)

MISSING INFORMATION / NEED MORE INFO

ITEMS		BH C	BH A/B	BSB C	BSB A/B	REC C	REC A/B	SAL C	SAL A/B	RJ A/B 1	RJ A/B 2	RJ C 1	RJ C 2	SP A/B 1	SP A/B 2	SP C 1	SP C 2
1. ORIGIN	Precedence																
	Origin of the names																
	History of bacalhau																
2. VALIDITY	Validity Date																
	Fabrication Date																
3. TYPES	Types of bacalhau (explanations of them)																
	Type to each dish																
	Brand x Type (distinction)																
4. SALT	Desalting process																
	Why too much salt?																
	Among types, which one has more salt?																
	Does salt really preserves bacalhau?																
5. FISH	What fish /species bacalhau is																
6. PRICE	Why is it too expensive?																
	Why Porto is the most expensive?																
7. RECEIPTS	Receipts																
8. STORAGE	Packing bacalhau came in to POS																
	How to store at home																
	How bacalhau gets here / delivery process																
9. COLOR	Color (why is it like that?)																
	Yellowish bacalhau is spoiled?																
10. HEALTH	Any restrictions to consumption?																
	Nutritional info																
	Health benefits																
	Does it have Omega 3?																
	Trans fat																
11. OTHERS	How to choose bacalhau																
	Manufacturers (who are they?)																
	Is there any "contact us" phone number?																
	Quality seal																
	Can bacalhau be frozen at home?																

- ❖ Flertallet ønsket mer informasjon klippfisk, og informasjonen skulle primært være tilgjengelig på utsalgsstedet, sekundært via TV.

❖(1) Deltagerne ønsket/etterlyste mer informasjon om klippfisk enten på etikettene (hvis fisken ble solgt emballert) eller på boards/plakater. Dette ble nevnt i 10 av 16 grupper. Ønsket informasjon var særlig holdbarhet, hvordan skille mellom ulike typer, hvor kom klippfisken fra, næringsinnhold/-verdi produsent, fiskeslag, kvalitetsmerke/-garanti og opplysnings-/kontakttelefon. Noen ønsket mer rundt klippfiskens historie (med referanse til hvordan man markedsfører vin), hvordan den distribueres og hvordan den skal/blir lagret.



Etikett



Poster/board



Brosjyrer

- ❖ (2) i 6 av 16 grupper mente de at denne informasjonen kunne spres gjennom brosjyrer i supermarkeder. I dag inneholder disse brosjyrene kun tilbud, dvs pristilbud

❖ (3) Deltagerne i 8 av gruppene mente at promotorer i supermarkedene var en god ide.



Promoterer & smaksprøver

Bruk av massemedia



❖ (1) I 4 grupper ønsket man mer faktabasert informasjon om klippfisk på TV for å rydde unna spørsmål og tvil og avlive myter

❖ (2) Reportasjer om klippfisk så vel som at klippfisk offere ble brukt i matprogrammene ble nevnt i 5 av gruppene.



I tabellen under er resultatene samlet

Means Information Should be Divulgated

ITEMS		BH C	BH A/B	BSB C	BSB A/B	REC C	REC A/B	SAL C	SAL A/B	RJ A/B 1	RJ A/B 2	RJ C 1	RJ C 2	SP A/B 1	SP A/B 2	SP C 1	SP C 2
SUPERMARKET	Supermarkets' folders																
	Promoters in the supermarket																
	Degustation in supermarket																
	Poster aside of the product																
	Specialist in the supermarket																
	On bacalhau pack / tag																
NEWSPAPER	Newspaper																
TV	TV reports / news																
	TV propaganda																
	Culinary Programs on TV																
OTHER	Folders in pubs and beaches																



VI – Oppsummering

- ❖ Assosiasjonene til bacalhau er primært knyttet til ulike typer retter og anledninger som jul, nyttår og påske. Noen tenkte på Portugal og portugisiske produkter som oliven og olivenolje. Bacalhau var også forbundet med familiesammenkomster.
- ❖ Når det gjaldt klippfiskens opphav ble Noruega og Portugal nevnt i flere grupper. Men det var også mange som uttrykte at de ikke visste eller var i tvil om hvor klippfisken kom fra.
- ❖ Porto (torsk) og Saithe (sei) virket godt kjent blant deltagerne. Zarbo (brosme) og Ling (lange) synes mye mindre kjent og ble konkret bare nevnt i Recife, Salvador og Belo Horizonte. I alle gruppene var det deltagere som enten ikke kjente til noen klippfisktyper og/eller blandet det sammen med stykninger og merker.
- ❖ Siden Zarbo og Ling var mindre kjent, kom det heller ikke opp mange assosiasjoner relatert til disse. Assosiasjonsmessig var Porto synonymt med den beste klippfisken fordi den er hvitest, tjukkest og dyrest. Det er også Porto man bruker når man skal gjøre inntrykk på gjestene. Saithe er assosiasjonsmessig nesten det motsatte. Den er billig, tynn og mørk på farge. Videre er den saltere og inneholder mer bein. Saithe anvendes primært til retter hvor fiskekjøttet rives fra hverandre.
- ❖ Påske, jul og nyttår er de viktigste anledningene for å spise klippfisk. Dernest kommer fødselsdager, Morsdag og helg. Klippfisk oppfattes ikke å være en hverdagsrett. Deltagerne uttrykte at det også er tradisjon å ikke spise klippfisk utenom nevnte anledninger og dette i kombinasjon med å være dyrt, bidrar ikke til økt konsum. Deltagerne fra sosial klasse A/B tenderte mot å spise oftere enn de fra sosial klasse C. Et annet moment var at klippfisk oppfattes som krevende i forhold til mange andre matalternativer.
- ❖ De viktigste kriteriene for å velge klippfisk ble påstått å være farge (dess lysere dess bedre), tjukkelse (dess tjukkere dess bedre) og stykninger (avhengig av hva man skulle lage av klippfisken). Loin er ettertraktet, men mange var også glade for at de kunne kjøpe i mindre enheter pakket på brett, også skinn- og beinfrie alternativer. Dette gjorde at man kunne ta seg råd til klippfisk oftere. Andre kriterier som ble nevnt var synlig salt, tørrhet (ikke for tørr), konsistens og lukt.

- ❖ Kunnskaper hentet fra mor, ektemake og øvrige familie/venner var viktigst. Noen har også hentet kunnskaper fra kokkeprogrammer på TV
- ❖ Supermarkedet er stedet hvor majoriteten gjør sine innkjøp, simpelthen fordi de handler de andre dagligvarene sine der. Supermarkeder finnes overalt og de er rene. Noen sier at de kjøper klippfisk på markedet, men kvaliteten på disse markedene er variabel (i Belo Horizonte og i Sao Paulo er markedene svært gode). I tillegg hadde man følelsen av at man på markedene traff selgere med langt bedre produktkunnskaper enn i supermarkedene. I Rio og Brasilia finnes det spesialbutikker for bl.a. klippfisk, som også hadde høy status.
- ❖ På generelt grunnlag uttaler deltagerne at det aller meste av klippfisken selges med navn, vekt og pris. Denne informasjonen står på den ferdigpakke fisken, på boards i butikken eller i flyers og annen type markedsføringsmateriell. Flertallet etterlyste mer informasjon og da i særdeleshet informasjon om opphav, forskjell på ulike typer, ernæringsverdi/helseeffekt, hvordan man lager klippfisk, hvilke som passer til ulike retter, hvordan skille god fra dårlig vare, hvorfor det er så dyrt, hvorfor det er så salt og hva som er beste utvanningsmetode.
- ❖ Deltagerne ville at den informasjonen de etterlyser skal gjøres tilgjengelig der de kjøper klippfisken. De synes også det er en god ide å lage fakte-baserte TV-programmer som belyser det samme, og som også kan bidra til å avlive de mange mytene som synes å eksistere rundt klippfisk.
- ❖ Deltagerne ønsket seg også mer "reklame" eller oppmerksomhet rundt klippfisk utenom de vanlige salgstidene (jul, nyttår, påske). De følte at salgstrykket rundt nevnte høytider gjorde at man "glemte" at klippfisk også kunne spises ellers i året.
- ❖ På tross av at deltagerne uttrykker at deres kunnskaper om klippfisk er (svært) mangelfulle, virket det som de ikke hadde særlige problemer med å kjøpe, lage til og servere klippfisk. Det er også verdt å nevne at mange sa at det var en tradisjon å spise klippfisk i nevnte høytider og at dette kunne tolkes slik at det også var en tradisjon å ikke spise klippfisk utenom de samme høytider.
- ❖ Klippfisk er og oppfattes som noe av det dyrere man kan kjøpe i Brasil. Det er derfor av største viktighet at forbrukerne da føler tilstrekkelig sikkerhet for at de får "value for money". Informasjon og kunnskaper om valg, utvanning og bruk av klippfisk vil kunne bidra til at forbrukerne føler seg sikrere og dermed sitter igjen med matopplevelser som stimulerer til gjenkjøp.



Bacalhau in Brazil

Qualitative Marketing Research

Focus Groups, Brazil

Commisioned by Nofima Marked,
Tromsø, Norway

Spring 2010

Jens Østli, Nofima Marked





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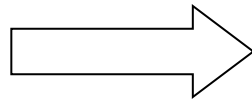
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I – Study's Objective

To obtain a deeper understanding of information cues consumers use when purchasing bacalhau

II – Methodology & Samples

16 focus groups were completed in the following cities:



Cities	Number of Groups	
	C Class	A/B Class
São Paulo	2	2
Rio de Janeiro	2	2
Belo Horizonte	1	1
Brasília	1	1
Salvador	1	1
Recife	1	1
Total	8	8

III – Panel recruiting

- ❖ Women and men (majority were women)
- ❖ 25 - 70 years-old
- ❖ Had purchased bacalhau after November 2009
- ❖ Had prepared or guided the preparing (great majority of recruited people were the ones preparing themselves)
- ❖ Social class A,B and C (participants belonging to group A and B were put together)

IV – Participants' Profile

Belo Horizonte	Rio de Janeiro		Recife
<p><u>Group 1 – Class C</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 28 to 55 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p> <p><u>Group 2 – Class A/B</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 26 to 59 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p>	<p><u>Group 1 – Class A/B</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 48 to 58 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p> <p><u>Group 2 – Class A/B</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 26 to 42 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p>	<p><u>Group 3 – Class C</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 47 to 69 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p> <p><u>Group 4 – Class C</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 28 to 45 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p>	<p><u>Group 1 – Class C</u> <input type="checkbox"/> 10 people <input type="checkbox"/> From 33 to 66 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p> <p><u>Group 2 – Class A/B</u> <input type="checkbox"/> 10 people <input type="checkbox"/> From 28 to 57 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p>
Brasília	São Paulo		Salvador
<p><u>Group 1 – Class C</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 27 to 64 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p> <p><u>Group 2 – Class A/B</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 27 to 47 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p>	<p><u>Group 1 – Class A/B</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 49 to 59 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p> <p><u>Group 2 – Class A/B</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 26 to 45 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p>	<p><u>Group 3 – Class C</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 46 to 68 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p> <p><u>Group 4 – Class C</u> <input type="checkbox"/> 8 people <input type="checkbox"/> From 26 to 43 years-old <input type="checkbox"/> All women <input type="checkbox"/> All are decision makers</p>	<p><u>Group 1 – Class C</u> <input type="checkbox"/> 9 people <input type="checkbox"/> From 25 to 51 years-old <input type="checkbox"/> 8 women and 1 man <input type="checkbox"/> All are decision makers</p> <p><u>Group 2 – Class A/B</u> <input type="checkbox"/> 10 people <input type="checkbox"/> From 25 to 56 years-old <input type="checkbox"/> 8 women and 2 men <input type="checkbox"/> All are decision makers</p>



V – FINDINGS

V.1 – Opening (Part 1)

V.1.1 – Associations/Thoughts of Bacalhau

Associations/thoughts of bacalhau seem to be similar independent of social class, age or city. When they think of bacalhau, the majority associates it with dishes/recipes (bolinhos, bacalhau with okra etc), festive moments such as Easter, Christmas, New Year or situations like family gatherings or remembrance of someone special. Other associations were Portugal, olive oil, olives, Skol (beer)

Citations:

"When I think of bacalhau, I think of Portugal, because here in Belo Horizonte, the majority of restaurants serving bacalhau are Portuguese" (woman, C class, 32 years-old, Belo Horizonte)

"No way of thinking of bacalhau without a good olive oil" (woman, A/B class, 45 years-old, Belo Horizonte)

"When I think of bacalhau, I first think of it as an expensive fish. That's why we only buy it twice a year" (woman, C class, 31 years-old, Brasilia)

"I'm very curious to know what bacalhau is because I have done many searches in the internet and haven't really found anything" (woman, C class, 39 years-old, Recife)

"I believe it's like a 'Caçao' fish, which is a shark's cup done in fillet and it's salty" (woman, 57 years-old, A/B Class, Recife)

"Everybody likes bacalhau, from the little ones to the older ones" (woman, 30 years-old, A/B Class, Rio de Janeiro)

"It's an expensive fish, so it needs to be done to many people" (woman, 51 years-old, A/B Class, Brasilia)

"It's an expensive dish only for special moments" (woman, 28 years-old, C Class, Rio de Janeiro)

"It reminds me of my childhood. My parents had a restaurant and they served bacalhau and I used to eat it a lot" (woman, 38 years-old, A/B Class, Salvador)

"I remember some old people from my family (who are not with us anymore), because they liked it" (woman, 41 years-old, A/B Class, Brasilia)

"It's a fish coming from the cold waters, that's why it's salted to be preserved" (woman, 49 years-old, A/B Class, Salvador)

"When I think of bacalhau, I first think how difficult it is to find a recipe to please everyone" (woman, 59 years-old, A/B Class, São Paulo)

"It's a dish to be prepared to the family" (woman, 42 years-old, C Class, Rio de Janeiro)



Words that 1st came to mind when thinking of bacalhau:

Sorted by Class

A/B CLASS:

Easter
 New Years / Christmas
 Special occasions
 Olive Oil (a good one)
 Olive
 No certainty of what bacalhau is
 A dried salty fish
 A Portuguese food
 Like Cação (s small shark)
 A different dish
 Salpicão (dish)
 Traditional
 Family gatherings
 Sophisticated
 Many people gathered together
 Party
 Childhood
 Particular flavour/taste
 Different texture, outstanding flavor
 Special texture
 Brand of bacalhau
 Particular smell
 Strong smell and salt
 Its quality when it's very white
 Difficulty in choosing recipe
 Way of preparing
 Nutritive

C CLASS:

Fish
 Easter
 Bolinhos
 Suflé
 Bacalhau with okra
 Salad
 Potato salad
 Skol (Brazilian beer)
 New Years / Christmas
 Caruru of bacalhau (food done in Bahia)
 Beautiful dish
 Portugal
 Bacalhau cooked in the oven
 Tasty
 Expensive
 Family
 Porto
 Desalting
 Pie



V.1.2 – Bacalhau's origin

Most of those who had an opinion mentioned **Noruega and Portugal**. They also said bacalhau comes from “cold waters”. One person mentioned Chile. No distinct differences observed between classes or cities

❖ Porto and Saithe are the ones mentioned in all groups; Some groups mentioned Ling and Zarbo as well, but with less emphasis. Ling and Zarbo were not mentioned in Belo Horizonte, Salvador or Recife.

❖ Some people confuse “type” with “cuts”, so beside the names, they also mention “bacalhau desfiado” or “bacalhau em lascas” as if they were types.

❖ In São Paulo, Belo Horizonte and Salvador, “Bacalhau da Noruega” was mentioned as a type of bacalhau by some of the participants

❖ “Imperial” was known as a type of bacalhau in Rio de Janeiro

❖ “Mulato Velho” is also a name of a fish product mentioned in Rio de Janeiro that used to be sold as bacalhau, but it isn't. In Belo Horizonte, “Baiaçú”, a salted fish from the Amazonas was quoted as “Bacalhau Brasileiro” due to the salt and taste.

❖ Names of bacalhau are also thought of as “brands”. For some, especially in São Paulo, Saithe, Porto, Zarbo and Ling are “brands” of bacalhau.

❖ A few participants did not know about types or names, they just distinguish bacalhau by the color: “the darkest (escuro)” versus “the whitest (claro)”

V.1.3 – Types of Bacalhau

Mentions About Types:

- Porto
- Saithe
- Ling
- Zarbo
- Noruega (Norway)
- Imperial
- The darkest
- The whitest

“There is the lascas type too, we already buy it on trays, you can find it in Extra” (woman, C class, 45 years-old, Brasília)

“I know Porto type, this is exactly the Portuguese one” (woman, C class, 33 years-old, Brasília)

“There is the desfiado type too, (...). There is the fillet type too. (woman, C class, 53 years-old, Recife)

Descriptions, Associations & Differences Among Types:

- ❖ It seems to be common among the participants that “Saithe” is the darkest, thinnest and cheapest bacalhau while “Porto” is the whitest, thickest and most expensive one. There were few descriptions of Ling and Zarbo but among those, Zarbo had a better “image” than Saithe, but worse than Porto. Ling was described by someone in São Paulo as “thin (fino)”.
- ❖ Porto is always associated with being “the best” bacalhau of them all.
- ❖ Main differences between types of bacalhau relate primarily to color and thickness and secondly to taste and dishes/recipes.
- ❖ Some mentioned “Saithe” as the best to make bolinhos while Porto was best for dishes/recipes cooked in the oven

Main associations of “Porto” versus “Saithe”

Porto:

Whiter (mais claro)
 Better (melhor)
 Thicker (Mais grosso/espesso)
 Softer (mais macio)
 With no spines (não tem espinhas)
 More expensive (mais caro)
 It can be used for fillet (pode ser usado para filè)

Saithe:

Darker (mais escuro)
 Thinner (mais fino)
 It has spines (com espinhas)
 Cheaper (mais barato)
 It has more salt (tem mais sal)
 It is also tasty (tambèm è saboroso)
 It has more/thicker skin (tem mais pele)

Citations:

"Porto is my sweet spot"
(woman, C class, 35 years-old, Belo Horizonte)

"Bacalhau has to be Porto" (woman, 68 years-old, C Class, São Paulo)

"Saithe is for making bolinhos, it practically has no meat" (woman, A/B class, 45 years-old, Belo Horizonte and woman C class, 50 years-old, Rio de Janeiro)

"Saithe is like a leaf, too thin"
(woman, A/B class, 28 years-old, São Paulo)

"If you compare Porto, Saithe and Ling, you know Porto is better due to the color and thickness. Besides it is economical (drøy/dryg på norsk)" (woman, A/B class, 42 years-old, São Paulo)

"We can use the thinnest one, but when we see the thickest, it is more appealing" (woman, C class, 56 years-old, São Paulo)

"Difference between Porto and Saithe is big, in both quality and price" (woman, C class, 27 years-old, Recife)

"Saithe is darker, but it's also tasty" (woman, A/B class)

"There is a type for each dish"
(woman, A/B class)

"To serve a nice plate to guests, it has to be Porto"
(woman, C class, 46 years-old, Rio de Janeiro)

"After you clean Saithe, you loose almost all" (woman, A/B class, 46 years-old, São Paulo)

"Saithe is the worst because it is too dark and has many bones" (woman, A/B class, 38 years-old, Rio de Janeiro)

"Porto is better for doing salad, pies, besides, it serves more people" (drøy) (woman, C class, 31 years-old, Rio de Janeiro)

"I suppose Ling is thin. When bacalhau is too thin, it's better to eat another fish"
(woman, A/B class, 57 years-old, São Paulo)

"Bacalhau for me is only Porto, even though it's more expensive. That's why I only eat it once a year" (woman, C class, 36 years-old, São Paulo)

V.1.4 – Special Moments versus Day-by-Day

Independently of cities or classes, it was generally agreed that preparing bacalhau was most often done in festive moments primarily at Easter, Christmas and New Years and secondly for Mothers' Day, birthdays or Sundays.

A/B class tends to buy and consume more frequently than C classes, especially outside of the occasions mentioned above. This was most evident in Rio de Janeiro and Brasília.

Tradition was a very important driver for consumption. Both because it is a tradition to consume bacalhau on the occasions mentioned, and because it is “a tradition” not to eat it outside the same occasions. A few looked upon the preparation process as an obstacle. Desalting was time consuming.

The price was said to be the main obstacle for not eating bacalhau more frequently. Price was an issue not only for C classes, but also for A/B classes.

Main Dates

1st Instance:

Easter
Christmas
New Years

2nd Instance:

Mothers' Day
Birthday parties
Sundays

Main Reasons for Not Buying More

Price
Tradition
Difficulty & time consuming to prepare

Festive Moments

"On December 31st, I have to eat either bacalhau or pork meat. It's a superstition my mother passed on to me" (woman, C class, 35 years-old, Belo Horizonte).

"To eat something you need to be willing to eat it. But due to the fact that bacalhau is expensive, we prefer eating it on commemorative dates. In my house, bacalhau is a food prepared to gather the family" (woman, A/B class, Belo Horizonte)

"Usually in commemoration dates because then the bacalhau price is more favorable. That's we usually buy for those moments" (woman, C class, Brasília)

"I'm just not used to eat bacalhau at other moments" (woman, C class, Brasília)

"It's sacred to eat bacalhau for Easter, Christmas and my birthday" (woman, A/B class, Brasília)

"Consumption in commemorative dates are predominant" (woman, A/B class, Brasília)

"I eat more in festive moments because to do the complete bacalhau recipe is expensive. Not only the bacalhau, but also the other ingredients: Olive, olive oil, and so on" (Woman, A/B class, Brasília)

"I buy it 3 times a year: Easter, Mothers' Day and Season Greetings. This is due to tradition and because it's expensive" (Woman, C class, Recife)

"At Christmas, we usually have a better financial situation and that's why I prefer buying it at that moment. Besides, it's cultural. In addition, at those dates, we like to do a different dish" (Woman, A/B class, Recife)

Other Moments / No Special Moments

"Usually I prepare it on Sundays to gather the family. I prepare sophisticated dishes, a risotto for example" (woman, A/B class, Belo Horizonte)

"I don't need any special moment to do nothing. If I want to do it, I just buy and cook bacalhau" (woman, A/B class, 45 years-old, Belo Horizonte)

"Bolinhos can be done always, but the other dishes I do more in festive moments" (Woman, C class, Belo Horizonte)

"In the past, bacalhau was eaten only in festive moments, but today it can be eaten more often because the price seems to go down" (woman, C class, Belo Horizonte);

"When there is a promotion, I buy. My mother lives near Carrefour, so bacalhau desfiado is always in promotions, I always buy there" (woman, C class, Brasília)

"In my home, we consume more than only in festive moments, around 4 times a year, because it's just me and my husband" (woman, A/B class, Brasília)

"Not only in commemorative dates. If I want to eat it, it's in the market and I have the extra money, I buy it to eat it with potatoes" (Woman, A/B class, Brasília)

"I buy it almost every weekend" (Woman, C class, Recife)

"Almost every 15 days or when there is a birthday, I buy it to make bacalhau pie. I buy the cheapest bacalhau, around R\$ 15/kg. This is the same price we pay for red meat" (Woman, C class, Recife)

"Besides Seasons' Greetings and Easter, I buy it when I go to the market if I find a nice bacalhau with a good price. It is usually too expensive. So, this adds up to about 5 times / year" (Woman, A/B class, Recife)

Festive Moments (Cont)

"I buy bacalhau more for commemorative dates because on those dates restaurants are crowded, so I prefer making it at home" (woman, 55 years-old, A/B class, Rio de Janeiro).

"Christmas is not Christmas if do not eat bacalhau" (woman, 49 years-old, A/B class, Rio de Janeiro).

"I usually buy bacalhau for commemorative dates, because then we have visitors. Bacalhau is for being prepared to many people and in my house, there is only my husband and myself" (woman, 34 years-old, A/B class, Rio de Janeiro).

"In my house, we eat bolinhos very often, but not the other dishes. They are inconvenient to make. You have to take off the spines, skin, salt, it's very laborious. If you will make it on Sunday, you need to start desalting it on Friday. That's why we mainly chose commemorative moments to do those dishes" (woman, 42 years-old, A/B class, Rio de Janeiro).

"When you talk about bacalhau, you already think of commemoration" (man, 49 years-old, C class, Rio de Janeiro).

"Since it's an expensive dish, I prepare it for special moments" (woman, 58 years-old, C class, Rio de Janeiro).

"I eat bacalhau more in festive moments, basically due to the tradition. It would not be that expensive to buy it once a month, but I'm just not used to it" (woman, 52 years-old, C class, Rio de Janeiro).

"I think we basically buy bacalhau in festive moments due to the price, but also due to the work it takes to prepare it." (woman, 34 years-old, C class, Salvador).

"We mostly use bacalhau in festive moments due to price, tradition and the work related to the preparation." (woman, 45 years-old, C class, Salvador).

Other Moments / No Special Moments (Cont)

"I buy bacalhau when there is a promotion. I freeze it and eat whenever I want it" (woman, 58 years-old, A/B class, Rio de Janeiro).

"I like bacalhau a lot, so I make it not only for commemorative dates" (woman, 52 years-old, A/B class, Rio de Janeiro).

"Even if it's not in the period, if I see a promotion, I buy it" (woman, 48 years-old, A/B class, Rio de Janeiro).

"My grand-father was Portuguese, so I buy it to cook, not only at commemorative moments, but because it reminds me of my childhood parties" (woman, 56 years-old, A/B class, Rio de Janeiro).

"In my house, almost every Sunday there is bacalhau" (woman, 28 years-old, A/B class, Rio de Janeiro).

"Besides festive moments, I buy it when I want it" (woman, 48 years-old, A/B class, Salvador).

"I buy bacalhau independently of dates, but on those dates too" (woman, 38 years-old, A/B class, Salvador).

"I buy bacalhau when I want to please someone too" (woman, 49 years-old, A/B class, São Paulo).

"For me, bacalhau is like red meat' price, I buy it once a week" (woman, 51 years-old, A/B class, São Paulo).

"I think differently from the others: When I want it, I buy it, I don't get stuck to special moments" (woman, 58 years-old, C class, São Paulo).

"Bacalhau is always special, I do it on some Sundays, when we will receive some friends" (woman, 61 years-old, C class, São Paulo).

Citations:

Festive Moments (Cont)

"It's a tradition since was a child to eat bacalhau at Christmas" (woman, 28 years-old, A/B class, Salvador).

"It's like an obligation: Every Easter you make bacalhau, it's same as preparing turkey at Christmas" (woman, 57 years-old, A/B class, São Paulo).

"I think sometimes we buy it more in festive moments, because when those dates come, supermarkets start exposing it more to us, doing more promotions" (woman, 50 years-old, A/B class, São Paulo).

"I buy it more in festive moments because bacalhau is expensive. Besides, at those dates, you have more product choice" (woman, 59 years-old, A/B class, São Paulo).

"There are more promotions on commemorative dates. Now, bacalhau costs R\$ 60 / kg, at Easter, it was R\$ 39/kg" (woman, 58 years-old, A/B class, São Paulo).

"If you had more promotions on other dates, it would be like chicken or any other fish" (woman, 52 years-old, A/B class, São Paulo).

"I do not buy much bacalhau, also due to the price" (woman, 28 years-old, A/B class, São Paulo).

"I don't buy bacalhau more often because it's not so much promoted" (woman, 38 years-old, A/B class, São Paulo).

"I would like to buy bacalhau, but when I go to the market and it's R\$ 40/kg, I can't just spend that on an everyday meal" (woman, 41 years-old, A/B class, São Paulo).

V.2 – Previous Information (Part 2)

V.2.1 – Information Used to Choose & Buy Bacalhau

When selecting bacalhau at point of sale (POS), participants mostly mentioned the **color** (the whiter, the better), **thickness** (the thicker, the better), types of **cuts** and **price** as their main criterias. These attributes were mentioned by all groups, independently of class and city. Other attributes mentioned were:

Criteria to Choose Bacalhau at the POS

1. Quality: Synonym for white color and thick fish (*cor branca e espessura grossa*)
2. Cuts: Some prefer buying bacalhau on trays because it's more practical. Others prefer buying whole. Then they ask the sales person to cut it the way they want. Others are afraid of being fooled when buying pre-packed because they think only the best pieces in the package are visible.
3. Cuts: Types of cuts are a driver too, depending on the dish they will make: If it's a salad or bolinhos, they prefer "desfiado" or "lascas". If they are going to make dishes in the oven, they prefer the loin (lombo). The tail and bones are never considered to be used.
4. Color: Meat has to be as white as possible (*a mais branca possível*);
5. Thickness: Meat has to be as thick as possible (*a mais espessa/grossura possível*);
6. Dryness (Secura): The bacalhau has to be dry. If they see traces of humidity, they don't want it because they think it's either spoiled or that they will pay extra (for the excessive water)
7. Skin: Some mentioned that if the skin slipped easily, it was a good bacalhau (this item was mentioned in Brasília)

Criteria to Choose Bacalhau at the POS (cont)

9. Salt: Bacalhau must have visible salt on the surface. This is a way they are sure bacalhau is preserved. Others said that too much salt is also an indication of a too hard and dried bacalhau. The latter was looked upon as negative
10. Firm: Participants mentioned that bacalhau needs to be firm (*Firme/Firmeza*) to be good
11. Texture: The texture was also evaluated, but it was unclear what they were looking for
12. Types of bacalhau: Participants mentioned that sometimes the difference between “Saithe” and “Porto” was a criteria to choose bacalhau, depending on the dish they will prepare. Some also mentioned that “Porto” was more economic (*rende mais*), i.e you can serve more people pr kilo than Saithe;
13. Smell: When the smell is too strong and rancid, some prefer not to buy
14. Crumbling: Some people mentioned that when the fish crumbles, it’s not good for consumption. To test, they touch the bacalhau in the shop
15. Freshness: When bacalhau is exposed on counters, it seems to be fresh. Some use this to select
16. Appearance / “Beauty”: Some people mentioned the words “appearance and beauty” as criterias to choose bacalhau. By appearance and beauty, they basically meant color, thickness and firmness
17. No spots: Some people mentioned bacalhau cannot have “brown spots”. If they see it, they don’t buy it
18. Fake: Some mentioned that they checked that the fish was not a “fake”, that means that it is real bacalhau, not other fish. It is unclear how they do this but some checked by texture, skin, taste and smell
19. Expiration date: some people mentioned they look for the expiration date on bacalhau packages, when available;
20. Price: Even though they look for price and promotions and said that if price was lowered they could buy bacalhau more often, a couple of them said that if Porto was to be offered at a very low price, they would be suspicious.
21. POS hygiene: 2 groups, one from São Paulo and one from Belo Horizonte, mentioned the importance of POS being clean. They also paid attention to see if the bacalhau was not surrounded by mosquitos, flies, etc...

Citations:

"I prefer buying on trays, it's free of flies" (woman, C class, 37 years-old, Belo Horizonte)

"I prefer asking the sales person to cut, because then I can check if the bacalhau is firm" (woman, C class, 42 years-old, Belo Horizonte)

"I choose by its beauty, I prefer buying the middle part of bacalhau, it is the most beautiful part while the tail is the ugliest part" (woman, C class, 51 years-old, Belo Horizonte)

"It's usual to use price as a criteria, but price is sometimes a myth. You can find bacalhau at R\$ 15/kg, this is the price of a read meat for barbecue" (woman, C class, 48 years-old, Belo Horizonte)

"I don't have any real criterias, I just heard you should choose bacalhau without bones and with few scales (rist på norsk). So, first, I check thickness and if it's firm" (woman, 49 years-old, A/B class, Belo Horizonte)

"I usually check if the bacalhau is thick, white, firm and also that it is not crumbling" (woman, A/B class, 28 years-old, Belo Horizonte)

"I check if bacalhau is dry, not wet" (woman, A/B class, 59 years-old, Belo Horizonte)

"I like it when the color is white and it's thick. Besides, it's better when I can easily peel of the skin. I prefer it that way" (woman, C class, 58 years-old, Brasília)

"I prefer buying bacalhau em lascas (on trays), because it's already ready. I mean, you don't need to take the spines and skin off" (woman, C class, 27 years-old, Brasília)

"I prefer choosing bacalhau em postas. With that, I usually make it with potatoes, my sons like it" (woman, C class, 43 years-old, Brasília)

"When they sell it on trays, what I think is that they put the best parts on top. I already bought it twice, so I have learned from it. Unless if it is Porto type, then we can see it is nice because the pieces are thick" (woman, C class, 48 years-old, Brasília)

"A good bacalhau needs to be dry (bem seco)" (woman, C class, 34 years-old, Brasília)

"Once I bought Saithe and I thought it was terrible. I made crème de bacalhau with it because it had no texture. Saithe is very uneconomical and I will never buy it again" (woman, A/B Class, 47 years-old, Brasília)

"Some pieces have too much skin, I don't like it. I like pure and fresh meat" (woman, A/B class, 27 years-old, Brasília)

"It needs to be fresh. Some supermarkets I trust, like Carrefour. I feel more comfortable when I buy there" (woman, A/B class, 38 years-old, Brasília)

"If it's fresh, its color is whiter" (woman, A/B class, 41 years-old, Brasília)

"I prefer buying the loin (lombo), it's easier to prepare" (woman, A/B class, 37 years-old, Brasília)

"I also check if it has salt and if it's well stocked at right temperature" (woman, A/B class, 44 years-old, Brasília)

"When I touch the bacalhau and it's too soft, I don't buy it. It needs to have texture. It cannot be sticky or soft. If it's like that, I don't buy because it's spoiled". (woman, C class, 58 years-old, Recife)

"If the smell is strong and 'picante' it is a sign of a bad bacalhau. When it's too yellow, it's also not good". (woman, C class, 44 years-old, Recife)

"If it has too much salt, it's not good. It has to have an adequate quantity of salt". (woman, A/B class, 57 years-old, Recife)

Citations:

"No rancid smell". (woman, A/B class, 34 years-old, Recife)

"Sometimes I taste it when I'm buying it, to check if it's new. If it's too old, it tastes bitter (amargo). An old bacalhau crumbles". (woman, A/B class, 43 years-old, Recife)

"I think it's better preserved when packed on trays" (woman, C class, 25 years-old, Salvador)

"I've never bought it on trays. I like to touch it, choose, weigh, pay and leave" (woman, C class, 51 years-old, Salvador)

"I never buy the ones on the top, they are touched and manipulated by others" (woman, C class, 42 years-old, Salvador)

"It depends. Sometimes I prefer buying it on the trays, sometimes I prefer selecting the pieces and put them in a sack to weight. It depends on the quantity I want to buy" (woman, C class, 48 years-old, Salvador)

"When it's too dry, it's too old" (woman, A/B class, 43 years-old, Salvador)

"I notice sometimes it's soaked, so it contains too much salt. It's a way of increasing the weight making us pay more" (woman, A/B class, 56 years-old, Salvador)

"I think bacalhau is too expensive, so you need to see that it is nice. Around R\$ 17 / kg would be great for me" (woman, A/B class, 34 years-old, Salvador)

"I usually go shopping with a list. If I'll make a salad, then, I already know the quantity I'll need, Then I'll check if the price is compatible with quality. Since it's a fish preserved with salt, it is hardly spoiled" (woman, A/B class, 27 years-old, Salvador)

"Near my work, they sell bacalhau on small trays. I prefer buying like that, it's more practical" (woman, A/B class, 48 years-old, Rio de Janeiro)

"I choose to buy bacalhau so I can avoid the tail, the fins and thick bones" (woman, A/B class, 52 years-old, Rio de Janeiro)

"They will always include a piece of the tail in the trays, that's why I don't like buying that way" (woman, A/B class, 58 years-old, Rio de Janeiro)

"Bacalhau has to be thick. If you try to tear of a small piece of meat, it has to loosen easily" (woman, A/B class, 42 years-old, Rio de Janeiro)

"I prefer selecting the whole fish and ask them to cut. You choose the size and the person cuts for you. But they must not cut it transversely" (woman, A/B class, 50 years-old, Rio de Janeiro)

"The other (referring to Saithe) is like Sardinha, too much spines. The more spines it has, the more laborious it becomes" (woman, A/B class, 31 years-old, Rio de Janeiro)

"I prefer buying a whole fish and then ask the sales person to cut it for me" (woman, A/B class, 28 years-old, Rio de Janeiro)

"The thinner and cheaper bacalhau does not serve many people. With the best one, you pay more, but it also serves many people". (woman, C class, 56 years-old, Rio de Janeiro)

"It is important that the bacalhau is not humid. It needs to be dry, otherwise it's spoiled". (woman, C class, 59 years-old, Rio de Janeiro)

"If it's too dark, I don't buy it". (woman, C class, 47 years-old, Rio de Janeiro)

Citations:

"I squeeze it to check that it's not too hard (duro)" (woman, C class, 32 years-old, Rio de Janeiro)

"Too hard means too much salt" (woman, C class, 41 years-old, Rio de Janeiro)

"I choose bacalhau by its color, the whiter the better. Much like the clothes to a baby" (woman, A/B class, 49 years-old, São Paulo)

"I like the whitest and thickest, the one 'you eat with your eyes' " (woman, A/B class, 52 years-old, São Paulo)

"Bacalhau cannot be humid nor have any spots (manchas)" (woman, A/B class, 59 years-old, São Paulo)

"If you find water on the tray, you must complain. This should not happen". (woman, A/B class, 57 years-old, São Paulo)

"It needs to have visible salt and be dry. Salt preserves it". (woman, A/B class, 55 years-old, São Paulo)

"You have to check it is a real bacalhau and not fake, by its texture and skin". (woman, A/B class, 57 years-old, São Paulo)

"There are some fish they also sell as bacalhau. It has a taste close to bacalhau. You need to be careful when buying it because you can be paying that much for a fake fish". (woman, A/B class, 50 years-old, São Paulo)

"I prefer buying bacalhau on trays, I can easily see the product". (woman, A/B class, 44 years-old, São Paulo)

"I prefer buying bacalhau on trays, it's a matter of convenience. If you buy whole fish, it's too big". (woman, A/B class, 32 years-old, São Paulo)

"The ones already packed... sometimes they fool us by the weight, they weigh the ice on it, too much ice, companies were taking advantage of that". (woman, A/B class, 26 years-old, São Paulo) Probably referring to frozen products

"Bacalhau cannot be too soft, you can notice, you just touch and pull it like that". (woman, A/B class, 33 years-old, São Paulo)

"It must not give you a feeling of it being moldy". (woman, A/B class, 41 years-old, São Paulo)

"You need to be careful when buying it on trays. They put the whither pieces above and the yellowish ones below". (woman, A/B class, 38 years-old, São Paulo)

"Price is important, but if Porto gets too cheap, it's difficult to know if it's really bacalhau". (woman, C class, 65 years-old, São Paulo)

"If it has brown spots or it's too dark, it's not good". (woman, C class, 48 years-old, São Paulo)

"I check if it's the real stuff, you need to watch it carefully" (woman, C class, 55 years-old, São Paulo)

"It needs to be very white and have a nice appearance (woman, C class, 59 years-old, São Paulo)

"Bacalhau skin is thick and viscous, that's why nobody uses it. We don't want to buy it in the market". (woman, C class, 27 years-old, São Paulo)

"Thickness is synonymous to quality". (woman, C class, 37 years-old, São Paulo)

"I also check how bacalhau is exposed, if there are any mosquitoes". (woman, C class, 43 years-old, São Paulo)

"It's right, I also assess the place, water on the floor, dirt, cleaning conditions of the place also makes me feel more convinced that you are buying a quality product. Smell can not be too strong too". (woman, C class, 40 years-old, São Paulo)

V.2.2 – Information sources

Where and how participants learn how to select bacalhau varies, but their **mother** is the one mentioned by most.

Learning from the family in general, from the husband, friends, mother-in-law are also mentioned as well as learning through their own experience. Other mentioned TV-programs such as Ana Maria Braga or Edu Guedes (both running TV shows where food preparation is important), supermarket booklets, culinary magazines, internet, specialized stores, restaurants (2 participants had worked in restaurants) and the consumers' rights government body, PROCON. In São Paulo, some people mentioned they had learned to buy “branded” bacalhau, as a guarantee of buying a good bacalhau.

The issue of quality is the main valuable information they say to have learned from their different sources. They also have picked up the different recipes from the same sources. As stated before **thickness and color** seem to be the most important criteria for choosing bacalhau. Thickness is also associated with how many people bacalhau can serve, that it is economical (*rende mais*) (drøy/dryg in Norwegian)

The above mentioned sources was also the most important for learning how to desalt, although this was not related to the buying process.

Citations:

"My mother taught me to select bacalhau. You take a kg of red meat to prepare and you don't serve many people, but if you take a kg of bacalhau to prepare, oh my God, it needs to have many people to eat it, because it does serve many people" (woman, 34 years-old, C class, Belo Horizonte)

"My own experience helps me selecting. Sometimes there are many pieces available. You buy it and experience that it is too much skin compared to meat. So I am taught to check the whole piece according to the quantity of meat" (woman, 60 years-old, A/B class, Belo Horizonte)

"I also learned from my mother, because she knows it. If I'll prepare anything with bacalhau, I ask her advice. So, I know the whiter, the better and also Porto is better. Besides, she taught me to check that the package is not damaged. If the package has any little whole, it can be full of bacteria" (woman, C class, Brasília, 42 years-old)

"(...) we'll get our own own experience over time" (woman, C class, Recife, 55 years-old)

"I have seen an Ana Maria Braga program on TV on how to buy bacalhau" (woman, 33 years-old, C class, Recife)

"I've learned from a friend. Her mother-in-law is Portuguese and she has taught my friend" (woman, 30 years-old, C class, Recife)

"My mother told me not buy when it has this pinkish color and rancid smell" (woman, A/B class, Recife, 38 years-old)

"I've learned by myself through practice. I've also worked in a restaurant" (woman, A/B class, Recife, 52 years-old)

"I've learned everything from my husband. When I married him, he already knew how to choose bacalhau by thickness and smell, so he passed me this information" (woman, A/B class, Recife, 43 years-old)

"By own experience. I just know that, for salad, it needs to be a nice bacalhau" (woman, A/B class, Salvador, 56 years-old)

"I won a book from a supermarket when I bought bacalhau for a festive moment. I thought it was great to learn about bacalhau" (woman, 41 years-old, A/B class, Salvador)

"Practice made me know, also preparing different dishes" (woman, 49 years-old, A/B class, Salvador)

"My husband knew a lot about cooking. Before passing away he was the one buying it, so he taught me to buy a thick and dry bacalhau to avoid paying for water" (woman, 58 years-old, A/B class, Rio de Janeiro)

"My father taught me to only buy the thicker part of bacalhau" (woman, 48 years-old, A/B class, Rio de Janeiro)

"My mother taught me to ask them to cut bacalhau at the place we buy it. Still, they can cut other parts you didn't ask for..." (woman, 52 years-old, A/B class, Rio de Janeiro)

Citations:

"My mother taught me to choose the whitest, the thickest, with no spots and one that shaves (skiver seg)" (woman, 26 years-old, A/B class, Rio de Janeiro)

"I have learned through my own experience, but also through older people. My grandmother always told me not to buy "humid" bacalhau, for example" (woman, 54 years-old, C class, Rio de Janeiro)

"I'm afraid of doing any mistake, so I do what my family taught me" (woman, 57 years-old, A/B class, São Paulo)

"I keep learning day-by-day as a result of being a housewife. We keep on looking for price, quality. When you see that white and thick bacalhau, that is the one" (woman, 38 years-old, A/B class, Rio de Janeiro)

"I've learned by myself over the time. Especially because I like to cook. The dishes become nicer if you buy a better bacalhau. Saithe, for example, only works for bolinhos. Using the other nice ones for salads are great!" (woman, 69 years-old, C class, Rio de Janeiro)

"When Easter comes, they give you many recipes and tips on TV. They also explain to us how to not be fooled. Besides, there is PROCON (consumers' rights government body), that explains us what to look for when buying it" (woman, 55 years-old, A/B class, São Paulo)

"What helps me is going to a specialized store, like Casa Porto at Copacabana. There they have wonderful sales people, they help us selecting. Besides, if you ask, they will turn bacalhau all around for you to see and select the best piece" (woman, 42 years-old, A/B class, Rio de Janeiro)

"My mother told me to never buy the tail, otherwise, you will prepare a terrible salad" (woman, 31 years-old, C class, Rio de Janeiro)

"On TV, they talk about how to select bacalhau" (woman, 46 years-old, C class, São Paulo)

"I've learned by studying what others are buying, because I'm very curious" (woman, 28 years-old, A/B class, Rio de Janeiro)

"My mother used to do bolinhos a lot. She taught me to prepare it. We buy Saithe for that, especially because it's cheaper" (woman, 43 years-old, C class, Rio de Janeiro)

"My mother told me I have to choose bacalhau by color and smell. It must not be smelling like piss" (woman, 33 years-old, C class, Rio de Janeiro)

"I once bought a very thin bacalhau and it didn't serve many people. I have therefore learned to buy a thicker and more expensive one" (woman, 55 years-old, C class, Rio de Janeiro)

"I've learned some things from and with my family, but other things from friends and culinary TV programs" (woman, 49 years-old, A/B class, São Paulo)

"A long time ago, I worked in a house of a family from Portugal. I learned it there" (woman, 34 years-old, C class, São Paulo)

"I learned from my mother to select by the brand. Then you know you're buying a good bacalhau" (woman, 38 years-old, C class, São Paulo)

V.3 – Point of Sale (Part 3)

V.3.1 – Place where they buy bacalhau

Bacalhau is bought in the **supermarkets** by the majority of participants basically due to:

1. It is more practical to buy bacalhau when doing the other shopping
2. Supermarkets are everywhere, there is always one near their house;
3. Supermarkets are cleaner than open fairs/markets;
4. One can find bacalhau at the supermarkets in all periods of the year;
5. One have more options/products in the supermarkets;
6. Supermarkets have more faith/trust
7. There is more turnaround of products in supermarkets
8. There is a better chance of finding promotions on bacalhau.

If the city has a good and well-structured' **“Municipal Market”**, which is the case in São Paulo and Belo Horizonte, some people prefer buying at those places due to:

1. They can choose the best pieces and see the sales person cutting it;
2. Sales people are usually more service minded, explaining and talking to them
3. Some people think the quality of the bacalhau is better here
4. There is a feeling of a better supervisory (tilsyn) in São Paulo's Municipal Market due to the fact that many restaurants buy from there.

In Brasília and Rio de Janeiro, instead of “Municipal Market”, some people prefer buying at specialized stores, such as an emporium, which is the case of “Municipal Market” in Brasília and “Casa Pedro” in Rio de Janeiro. These places give you the option of selecting the best pieces because sales people can cut the pieces in front of them;

1. Sales people are more talkative and professional.
2. Associate it with better quality of the products.

Note: those “specialized” places seem to be more attended by A/B classes in both Rio de Janeiro and Brasília.



There is a similar characterization from the cities representing the northeast of Brazil, Recife and Salvador: They don't have big and well-structured "under a roof municipal market" like Belo Horizonte and São Paulo. Thus, all open markets to them are synonymous with dirt and lack of sanitization. The products are sometimes exposed to flies and mosquitoes.

In Rio de Janeiro, there is a 4th type of POS, the mobile vendor. This is a person selling bacalhau from wheelbarrows in downtown streets or through stands placed on the streets, usually in festive periods such as Easter and Christmas. This POS was known by all participants in Rio de Janeiro, but the views changed from "having already bought from it and found it a good option" to "being suspicious about quality and sanitization of this option." Additionally, there are some sellers who only sell to company employees, with previous permission from the companies.

In the table below, see the names of points of sales mentioned in each city:

	Supermarkets	Public / Municipal Markets	Specialized Stores / Emporiums
Belo Horizonte	Supermarkets in general (no specific names)	Mercado Central	
Brasília	Carrefour, Extra, Pão de Açúcar, Comper, Cativo		Mercado Municipal
Rio de Janeiro	Mundial, Princesa, Guanabara, Carefour, Prezunic, Sendas		Casa Pedro
São Paulo	Carrefour, Extra	Mercado Municipal / Mercado	
Recife	Hiper, Bom Preço	Salty Fairs	
Salvador	Bom Preço	Ceasa Rio Vermelho	

Citations:

"I prefer buying at the supermarket because it's near my house and also because products rotate more, they are more fresh" (woman, Belo Horizonte, C class, 45 years-old)

"I buy in the supermarket because it's more convenient, I am already there to buy other things" (woman, Belo Horizonte, C Class, 36 year-old)

"I like going to 'Mercado Central'. I like to choose the pieces I'll buy, to see it being cut" (woman, Belo Horizonte, C Class, 38 year-old)

"In 'Mercado Central' you pass many stands, everything is of excellent quality. You can then make a pre-selection. Even though the price is higher than in the supermarket, their products are better." (woman, Belo Horizonte, A/B Class, 47 years-old)

"I think it's more practical to buy in the supermarket, because you can take the time to buy the other stuff you need to buy. Then you already buy everything in one place. Besides it's near my home, and they have small trays that you can use for only 2 people" (woman, Belo Horizonte, A/B Class, 36 years-old)

" I don't like buying in open markets/fairs, because people go there and touch the products, even if they don't buy. Many people touch it" (woman, C Class, Brasília, 42 years-old)

"It's great to buy at the 'Municipal Market' because sales people there are professional, so they can help you select" (woman, A/B Class, 47 years-old, Brasília)

"I don't like buying in open fairs because I don't think it's clean compared to big supermarkets". (woman, A/B class, Brasília, 27 years-old)

"I prefer going to supermarkets because I'm there already to buy other things. I don't go out to buy only bacalhau, I go out to buy everything at the same time" (woman, A/B class, Brasília, 35 years-old)

"I'm always looking for buying in places where I notice there is a good turnover of products. That means products are not stored or stacked for a long time" (woman, A/B class, Brasília, 43 years-old)

" I prefer buying in the supermarket because I trust it more and it's cleaner" (woman, C Class, Recife, 55 years-old)

" In open fairs they sell us another fish claiming it's bacalhau" (woman, C Class, Recife, 3 years-old)

" No way I buy in fairs, because there are flies above products, no sanitation" (woman, C Class, Recife, 35 years-old)

"In open fairs, the problem is the owner of stands. Due to lack of supervisory they don't care much for sanitation" (woman, A/B Class, Recife, 57 years-old)

" I prefer buying in supermarkets because they take care of the product since they have a name to take care of too. In small markets or open fairs, they have bad sanitizations conditions," (woman, A/B Class, Recife, 45 years-old)

Citations:

"Price I'll pay in the fair does not justify buying there because quality is the same as buying in a supermarket" (woman, Salvador, C class, 45 years-old)

"I prefer buying the right quantity I'll need in the supermarket, because they have the tray option" (woman, Salvador, C class, 39 years-old)

"I prefer buying at Extra supermarket, because there they have everything I need" (woman, Salvador, A/B class, 25 years-old)

"Supermarkets are places I consider to be more trustful" (woman, Salvador, A/B class, 56 years-old)

"Here in Rio de Janeiro, by Christmas, there are some ambulant sellers. They walk around with a wheelbarrow in downtown selling bacalhau. I have bought from them and the fish had a good appearance, it was good" (woman, Rio de Janeiro, A/B class, 54 years-old)

"I also buy at my work, there is an autonomous distributor who ask permission to sell bacalhau on trays to us working there" (woman, Rio de Janeiro, A/B class, 52 years-old)

"I do not have the courage to buy from those ambulant sellers, it's a matter of sanitization" (woman, Rio de Janeiro, A/B class, 48 years-old)

"I prefer buying at the supermarket, it's more practical because I already go there to buy all the other things and I can get any promotion" (woman, Rio de Janeiro, A/B class, 42 years-old)

"I prefer buying at Casa Porto (specialized store, such as an emporium), it's more sanitized" (woman, Rio de Janeiro, A/B class, 38 years-old)

"I don't like buying at Guanabara supermarket, they have many cardboard boxes all over. It's a mess" (woman, Rio de Janeiro, A/B class, 32 years-old)

"It would be better to buy at Casa Porto, there they weight and pack in front of you, and you can select whatever you like" (woman, Rio de Janeiro, C class, 69 years-old)

"They have more promotions in the supermarket, sometimes you can see it in their flyers" (woman, Rio de Janeiro, C class, 58 years-old)

"I never bought bacalhau from an ambulant seller, but I got one as a gift. It was good" (woman, Rio de Janeiro, C class, 55 years-old)

"I always prefer the supermarket, because if it's not good, you can go back and exchange it. It's much easier" (woman, Rio de Janeiro, C class, 53 years-old)

"I usually go to the Alfândega, an open market. It's my habit or tradition. I like the products there better and sometimes it's even cheaper. My mother-in-law taught me this" (woman, Rio de Janeiro, C class, 32 years-old)

"I prefer buying at the Mercado Publico because there is more supervisory (tilsyn). Besides there is more turnaround of products too because restaurants buy everything from there" (woman, São Paulo, A/B class, 49 years-old)

"When I think of buying bacalhau, I go to a hypermarket or supermarket, their turnaround is higher" (woman, São Paulo, A/B class, 59 years-old)

Citations:

"It's better to buy in supermarkets because they compete all the time. So if Carrefour has a price, Extra can offer a good price too" (woman, São Paulo, A/B class, 48 years-old)

"I prefer buying bacalhau in the supermarkets, because they always have bacalhau there" (woman, São Paulo, A/B class, 37 years-old)

"I like to buy at the Municipal Market because there, the sales people talk more, they explain more to us" (woman, São Paulo, C class, 56 years-old)

"I prefer buying in the supermarkets because it's more practical, you are already there for buying other stuff" (woman, São Paulo, C class, 51 years-old)

"They never let the supermarkets be without bacalhau, it is always there" (woman, São Paulo, C class, 68 years-old)

"In smaller markets, you can usually find Zarbo or the other cheapest ones, not Porto or Noruega. Those you only find in big supermarkets due to the high price" (woman, São Paulo, C class, 32 years-old)

"At Mercado (Municipal Market), you can find promotions and you will always find Saithe there" (woman, São Paulo, A/B class, 26 years-old)

"I prefer buying in big supermarkets because I can use their credit system. Some allow you to divide the payment in 6 rates: bacalhau, olive oil, everything" (woman, São Paulo, C class, 42 years-old)

V.3.2 – Information Observed at POS (point of sale)

- ❖ The great majority of participants affirmed that **price** and **weight** were basically the only information available at POS. This is particularly true for supermarkets, where the majority are doing their purchases.
- ❖ In some cases you also find information about the type of bacalhau, brand and “use by date”.
- ❖ Practically all groups said that advertising folders are usually available in the supermarket. When there are promotions on bacalhau, most often price promotions, the folders could include recipes.
- ❖ Some mentioned having seen “flash” promotions on price, especially broadcasted using microphone in the supermarket.
- ❖ A few in Recife and Salvador mentioned that they had seen promotions with tasting in supermarkets;
- ❖ When asked if they had noticed information about bacalhau in the markets, a great part of participants had a feeling that “**no information about bacalhau was available**” except from price.

In the box below we show what was mentioned:

- ❖ Price
- ❖ Weight
- ❖ “Use by date”
- ❖ Folders with price offers and or recipes
- ❖ Tasting promotions
- ❖ Brand labels
- ❖ Origin of bacalhau (mentioned by few people)

Citations:

"In some chic supermarkets they have the bacalhau on trays and they are sometimes labeled with types of bacalhau. But usually only the weight and price are the information available" (woman, C class, Belo Horizonte, 36 years-old)

"There is more information available on Easter and New Years, and usually the supermarket's ad/folder comes with price offers" (woman, C class, Belo Horizonte, 45 years-old)

"At Mercado Central, there is sometimes one specific type of bacalhau on promotion. Usually the sales person tells us" (woman, C class, Belo Horizonte, 28 years-old)

"You don't see any information about bacalhau in the supermarkets" (woman, A/B class, Belo Horizonte, 47 years-old)

"On the label on bacalhau trays, there is price and "use by" of the product" (woman, C class, Brasília, 49 years-old)

"Sometimes... I see a short story about bacalhau on some packs in the supermarkets" (woman, C class, Brasília, 38 years-old)

"There are only price and "use by" information at point of sale, nothing else" (woman, A/B class, Brasília, 27 years-old)

"The only propaganda I've seen in the supermarket is the supermarket's own ads/folders sometimes including bacalhau" (woman, A/B class, Brasília, 45 years-old)

"They have some fish promotions in the supermarket sometimes" (woman, A/B class, Brasília, 32 years-old)

"Usually, there is no information at all about bacalhau at point of sale" (woman, C class, Recife, 35 years-old)

"Usually, when the product is not selling too well, they put a promoter there. They give us some recipes and sometimes a taste." (woman, C class, Recife, 55 years-old)

"I've seen at Hiper Bom Preço a leaflet from Bacalhau da Noruega with recipes and how to take away the bones." (woman, C class, Recife, 42 years-old)

"You select a piece and the sales person weights it, then label it with "use by date", price and weight. But they always put "use by date" 3 days ahead, independent of how long time the bacalhau has been in the store. I doubt this is right" (woman, C class, Recife, 48 years-old)

"Once, I've heard that they had a "night promotion" with bacalhau from Norway for R\$ 13/kg per'. This was at 8 pm" (woman, A/B class, Recife, 37 years-old)

"I've seen leaflets inside the store" (woman, A/B class, Recife, 42 years-old)

"I've seen tasting sessions with folders with recipes" (woman, A/B class, Recife, 28 years-old)

"There is only price information there" (woman, C class, Salvador, 58 years-old)

"This week, I've seen a promotion on a poster in the supermarket selling 100 g of Saithe for R\$ 2,79" (woman, C class, Salvador, 58 years-old)

"They usually have folders with recipes and price offers" (woman, A/B class, Rio de Janeiro, 58 years-old)

"They should mention the scientific name of bacalhau, but they don't say anything" (woman, A/B class, Rio de Janeiro, 52 years-old)

Citations:

"If on that poster/board there is no "use by" information, will they start counting "use by date" when they weight it? I don't understand that" (woman, A/B class, Rio de Janeiro, 31 years-old)

"I once saw an audio propaganda by microphone in a supermarket about bacalhau from Norway being sold at R\$ 90/kg" (woman, C class, Belo Horizonte, 53 years-old)

"I even saw information with suggestions about how to prepare it" (woman, A/B class, São Paulo, 58 years-old)

"Everything is on the package: Where it comes from, price and weight" (woman, A/B class, São Paulo, 52 years-old)

"Sometimes, they write on the label of the pack if it's Porto or Saithe" (woman, A/B class, São Paulo, 35 years-old)

"The only information available on the packs in the supermarkets are: 'bacalhau', price name or brand" (woman, C class, São Paulo, 42 years-old)

"Inside Pão de Açúcar, I have seen some propaganda with offers of olive oil and bacalhau is located beside this product" (woman, C class, São Paulo, 38 years-old)

"There is no information when we buy whole bacalhau, there is only information on those sold on trays" (woman, A/B class, São Paulo, 38 years-old)

"In the past, in Pão de Açúcar, there used to be information about origin & name" (woman, A/B class, São Paulo, 32 years-old)

V.3.3 – Brands Available at POS

❖ Only very few people in Rio de Janeiro could remember any brand of bacalhau available at POS. And all the brands mentioned were frozen. Brands mentioned were: **Lidador**, **Rosa Alves** (which we suppose is “**Riber Alves**”) and **Ricca**. We have not found the last one in any supermarket and we are therefore unsure if its existence. The majority of the participants did not remember any brand of bacalhau. The ones who mentioned it, was unsure about “Noruega” being a brand or not. “Norge” was not mentioned by anyone.

“I have seen “Lidador” and “Rosa Alves” brands on packs of bacalhau in the supermarket” (woman, A/B class, Rio de Janeiro, 51 years-old)

“They have info of brands too, I’ve seen brand Rica there, my mother-in-law was with me” (woman, C class, Rio de Janeiro, 38 years-old)



V.3.4 – Help from Sales Person at POS

- ❖ The general impression was that at supermarkets there are no sales people with the capability to inform clients anything about bacalhau. An exception was in Recife where a couple of participants said they had met more knowledgeable sales people also in the supermarkets.
- ❖ On the markets the impression was that the sales people are more professional/specialized. They are both knowledgeable and service minded. In most cases, it seems like the shop owner himself is the person informing and selling.
- ❖ A couple of people said they had seen promoters of bacalhau in some supermarkets, but they were unsure whether the promoters actually knew anything about bacalhau or not.

Citations:

"In the supermarket, there is nobody to inform you about anything related to bacalhau" (woman, C class, Belo Horizonte, 28 years-old)

"At Mercado Central, you have salespersons who are specialists on bacalhau. They explain about types. In the supermarket, you don't have these persons to talk to" (woman, A/B Class, Belo Horizonte, 38 years-old)

"At Mercado Central, you have the presence of specialists, sales people who interact with us, they even give you recipes. Not so in the supermarket" (woman, A/B Class, Belo Horizonte, 42 years-old)

"At Mercado Central they once told me bacalhau is good for health because it contains Omega 3. They really convince us, because they are there exclusively to sell bacalhau" (woman, A/B Class, Belo Horizonte, 29 years-old)

"It should have been a promoter in the supermarkets to explain you about bacalhau, but there isn't any" (woman, C class, Brasília, 64 years-old)

"I once asked a manager of a supermarket why there was no sales person exclusively to sell bacalhau in the supermarkets. He said people open the packs and start eating it right there" (woman, A/B class, Belo Horizonte, 54 years-old)

"Once I asked a sales person in a supermarket, they didn't know anything. The man said bacalhau would probably be in the freezer, then it was not there because it was not frozen. When I found the trays, there were no tags on them, only bar codes. So I asked him the type of bacalhau, because there was no information on it. He said he didn't now and told me to ask the cashier" (woman, Belo Horizonte, A/B Class, 47 years-old)

"There isn't anybody in the supermarkets, not even to give you a recipe or any information" (woman, C class, Brasília, 43 years-old)

"Sales people in the supermarkets are there only to weight the fish, not to give you information" (woman, A/B class, Brasília, 47 years-old)

"It's easier to have someone to give you information about bacalhau in a small supermarket than in a big one" (woman, A/B class, Brasília, 36 years-old)

"Sales people don't know anything about bacalhau" (woman, C class, Recife, 45 years-old)

"Once I asked the sales person in a supermarket about bacalhau types. He only said Porto was the most expensive one, which I already knew" (woman, C class, Recife, 52 years-old)

"I even asked about types to a girl who offered tastings. She just said she didn't know either" (woman, C class, Recife, 38 years-old)

"The only information I got from a sales person in a supermarket was that bacalhau was expensive because it's imported" (woman, C class, Recife, 61 years-old)

"I asked which bacalhau I should buy. The sales person was fine with me, explaining the differences between the thin and the thick one and also mentioned it depends on the people's taste and dish you would like to prepare" (woman, A/B class, Recife, 55 years-old)

"Once I asked about bacalhau to a sales person in a supermarket and he guided me, he knew it pretty well. This was at Rende Mais Supermarket (small market). He was great!" (woman, A/B class, Recife, 33 years-old)

Citations:

"It would be a great surprise to me if anyone in the supermarkets knew anything about bacalhau. That's why we are not used to ask anything" (woman, C class, Salvador, 25 years-old)

"It would be great to have promoters there explaining what's best for bolinhos, for example" (woman, C class, Salvador, 38 years-old)

"Sales people have no intentions of giving us any information. Besides, they are not trained about bacalhau and therefore they have no knowledge to help the client about bacalhau. They are more used to red meat and chicken, for example" (woman, A/B class, Salvador, 43 years-old)

"At Easter, I asked the sales person about the excessive salt on the bacalhau because I was worried about it. But the sales person just didn't know how to inform me about anything. So, I looked aside and noticed there was another type of bacalhau explaining everything that could be done with that bacalhau, so I ended up buying that one" (woman, A/B class, Salvador, 56 years-old)

"When we asked them about bacalhau in the supermarket, they said: 'There you got me, I don't know anything'" (woman, A/B class, Rio de Janeiro, 48 years-old)

"I'm not used to ask sales people about bacalhau, maybe because it's an expensive dish. I prefer buying what I am used to" (woman, A/B class, Rio de Janeiro, 55 years-old)

"I'm not used to ask sales people, because I already know they will only say: 'This bacalhau is very good'. But actually they don't know anything" (woman, C class, Rio de Janeiro, 54 years-old)

"Sales people in the supermarket only weight bacalhau, they don't know anything about it" (woman, C class, Rio de Janeiro, 69 years-old)

"I prefer asking other consumers who are around to buy bacalhau. Sales people would not know about it" (woman, C class, Rio de Janeiro, 35 years-old)

"At Mercado, the sales people know well how to explain about each type of bacalhau and they even give us some recipes" (woman, A/B class, São Paulo, 59 years-old)

"Once I've seen a promoter of bacalhau. He also handed out recipes and information in a supermarket" (woman, A/B class, São Paulo, 26 years-old)

"For 3 times I tried to get information from sales people in supermarkets, they didn't know anything. Now, I don't need it anymore, but by that time, I was a novice, only 1 year-married, so I needed that information" (woman, A/B class, São Paulo, 49 years-old)

"Supermarkets should have someone well trained to inform on bacalhau to help us select. Especially on those particular dates" (woman, A/B class, São Paulo, 51 years-old)

"At Mercado, the owner himself gives us information, he is there to help us: You do not find that in the supermarkets" (woman, C class, São Paulo, 46 years-old)

"Once I've been in a supermarket to buy bacalhau, but didn't because the bacalhau had a cover over the pack and I couldn't tear off a little piece to check if it was really firm as I always do. I couldn't get the piece and there was nobody there to give me any information about that bacalhau. I ended up not buying it" (woman, C class, São Paulo, 53 years-old)

V.3.5 –Where Bacalhau is placed in shop

Places where bacalhau is found inside the supermarkets are basically the same in all cities. In many markets they have separate stands for bacalhau only. At Casa Pedro, which is a specialized store in Rio de Janeiro, bacalhau is on the sidewalk, before entering the store/market.

According to the participants, bacalhau is exposed in the supermarkets:

- ❖ Near smoked and salty products (bacon, dried meat, sausages, jerk beef, dried shrimp, etc...)
- ❖ Near the butchery
- ❖ Near cheese and cold cuts
- ❖ Near “feijoada” items (Brazilian dish with black beans)
- ❖ Near fish

It was underlined by many of the participants that in festive moments bacalhau is much more highlighted/promoted.

Bacalhau was also associated with the following product categories:

Olive oil, olive, onions and potatoes

Coconut milk

Pepper



Citations:

"They include onions and olive and potatoes are also close by. Everything you need to prepare bacalhau is all close to it" (woman, Belo Horizonte, C Class, 43 years-old)

"Bacalhau is in an aisle, highlighted on a table" (woman, Belo Horizonte, C Class, 36 years-old)

"Some supermarkets put it together with smoked and salty products, bacon, etc. You can't even notice that it is bacalhau there..." (woman, Belo Horizonte, A/B Class, 56 years-old)

"I saw it near 'feijoada' items and olive oil too" (woman, Belo Horizonte, A/B Class, 36 years-old)

"The place where bacalhau is put change when Easter comes. They give it more highlight in that period. They make a small tent exclusively for bacalhau, but only in festive moments" (woman, Brasilia, C Class, 64 years-old)

At Carrefour , there is a specific section only for those smoked and salty products, dried meat, bacon, etc.. It's an aisle exclusive for those things and bacalhau is among them" (woman, Brasilia, A/B class, 27 years-old)

"At Hiper, in Easter, they make a 'mountain' of bacalhau right when you enter the shop" (woman, Recife, A/B class, 57 years-old)

"At any supermarket here in Rio, bacalhau is in the same place, near the butchery" (woman, Rio de Janeiro, A/B class, 48 years-old)

"At Casa Pedro, bacalhau is on the sidewalk, in front of the store" (woman, Rio de Janeiro, A/B class, 58 years-old)

"Bacalhau is in a corner, hidden, not too exposed, in the supermarkets" (woman, Rio de Janeiro, A/B class, 27 years-old)

"You can see bacalhau in the supermarket all over the year, but in festive moments, you see more of it. And it's more exposed/decorated, it calls more for your attention. They highlight bacalhau in those moments using a long table" (woman, Rio de Janeiro, C class, 69 years-old)

"In the supermarket, bacalhau is in a kiosk with the wines" (woman, São Paulo, A/B Class, 56 years-old)

"At the point of sale, they make more out of bacalhau when it's a festive moment" (woman, Rio de Janeiro, C Class, 32 years-old)

"Usually, it's near the bakery or butchery" (woman, São Paulo, A/B Class, 49 years-old)

"This year, Carrefour placed bacalhau right in front, when you enter, the first thing you see. They had both on trays and whole fish" (woman, São Paulo, A/B Class, 53 years-old)

"At Carrefour dried meat, sausage and bacalhau on trays are all together, easy to be found " (woman, São Paulo, A/B Class, 26 years-old)

"Bacalhau should be near the fish, because people always take a fish to bring home" (woman, São Paulo, A/B Class, 43 years-old)

"Bacalhau is always together with the dried products, bacon, dried meat, sausage, 'feijoada' items. If you go there, you will always find it" (woman, São Paulo, C Class, 28 years-old)

V.4 – Advertising/Information in the Media (Part 4)

- ❖ Participants had the impression that very limited number of bacalhau advertising has been on the media (and even at POS). Promotions at POS is limited to price.
- ❖ In festive moments, specially Eastern and Christmas a few has observed advertising (mainly on TV, secondly on outdoor boards). They are from supermarkets presenting price offers.
- ❖ In some cities, ads from restaurants serving bacalhau was mentioned, inviting people to come and eat/taste their bacalhau dishes;
- ❖ A couple of participants in Recife, Rio de Janeiro and São Paulo mentioned they had seen ads with “Bacalhau da Nouega” on TV, but they did not remember what it was about. In Recife and in São Paulo, a couple remembered to have seen ads with family & children eating bacalhau and recipe suggestions. The impressions were good due to the association with family gathering. Most participants do not associate any advertising of bacalhau with the distributor or brand, only with supermarkets or restaurants.
- ❖ TV channels mentioned: “Globo”. Magazines mentioned: “Contigo”, “Caras”, “Veja” (they supposed they saw the advertisements on those channels/magazines);



REDE GLOBO

contigo!

CARAS

veja

- ❖ One participant from Brasília mentioned she had heard “sound-car” advertising (A car with a loud speaker driving around to promote products)
- ❖ Apart from advertising/promotions of bacalhau, some people mentioned the existence of TV or newspapers as sources for bacalhau information (especially Ana Maria Braga, Edu Guedes, Ana Rickman)
- ❖ It's a general opinion that if suppliers of bacalhau made more advertising about bacalhau, people would eat it more often.

Citations:

"The only propaganda I've seen is inside supermarkets, for example, saying Noruega bacalhau at R\$ 90 / kg" (woman, Belo Horizonte, C Class, 54 years-old)

"There is a lack of advertising, practically only in festive moments. We would like to eat bacalhau more often, but if we should depend on ads, we would only eat it on those dates" (woman, C class, Belo Horizonte, 58 years-old)

"There are advertising on TV from supermarkets with offers" (woman, C class, Rio de Janeiro, 51 years-old)

"I've seen advertising from "Rei do Bacalhau", a restaurant, on TV" (woman, C class, Rio de Janeiro, 60 years-old)

"I've seen a report on TV about bacalhau, saying it's healthy, good for cholesterol, also saying that if you take salt off there is no problems for the heart. Additionally, they mentioned we should eat it once a month" (woman, C class, Rio de Janeiro, 60 years-old)

"If suppliers of bacalhau are advertising more, we would probably eat it more often" (woman, Belo Horizonte, 33 years-old)

"I've seen advertising from a restaurant on Conselheiro Pires street. The ad said "come to eat the best bacalhau" (woman, Belo Horizonte, A/B Class, 59 years-old)

"Ads about bacalhau are not regular. From the supermarkets, only at Easter" (woman, Belo Horizonte, A/B Class, 26 years-old)

"Carrefour does some advertising on TV, price promotions. It is more advertising before Easter" (woman, Brasília, C Class, 27 years-old)

"I've seen recipes with bacalhau in the newspaper "O Correio" for Easter" (woman, Brasília, C Class, 38 years-old)

"If we got to see more ads, we would buy it more, it attracts our attentions" (woman, Brasília, C Class, 64 years-old)

"I've seen advertising of bacalhau on TV near festive moments, but they are always from a supermarket. (woman, Brasília, A/B Class, 43 years-old)

"I've also listened to this sound-car type of propaganda, not only near festive moments" (woman, Brasília, A/B Class, 47 years-old)

"They should advertise bacalhau in peak time, when we're watching TV. If also the price was more accessible prices, I believe we would buy more" (woman, Brasília, A/B Class, 27 years-old)

"I remember having seen a propaganda from Bacalhau da Noruega. It mentioned recipes, but I also remember they showed children and family eating" (woman, Recife, C Class, 66 years-old)

"That propaganda with Bacalhau da Noruega showed the tradition of the family. It's like the ads for turkey, family gathered" (woman, Recife, C Class, 43 years-old)

"I have seen propaganda of bacalhau on TV from a supermarket, showing price of bacalhau along with other items" (woman, Recife, A/B Class, 28 years-old)

Citations:

"There is almost no advertising for bacalhau here in Recife. When there is one, they only mention name and price, nothing else" (woman, Recife, A/B Class, 48 years-old)

"I've only seen advertising with price and price offer to this date, on TV or folders in the supermarkets" (woman, Salvador, C Class, 25 years-old)

"Bacalhau does not sell very well because they only use advertising in festive moments" (woman, Salvador, A/B Class, 36 years-old)

"Advertising for bacalhau are always the same: 'Bacalhau type X for XX/kg', nothing more" (woman, Salvador, A/B Class, 56 years-old)

"I've also seen once an ad for bacalhau in magazines, but don't remember how it was" (woman, Salvador, A/B Class, 29 years-old)

"I've never seen an ad for a bacalhau supplier, I have no idea of who the distributors are. Besides, there are very limited offers on bacalhau too" (woman, Rio de Janeiro, A/B Class, 48 years-old)

"I think consumption will increase if they put a promoter in supermarkets" (woman, Belo Horizonte, A/B Class, 29 years-old)

"There is always some advertising from the restaurant 'Rei do Bacalhau'. When it's a festive moment, you have to make previous reservation to go there" (woman, Rio de Janeiro, A/B Class, 55 years-old)

"They should make more advertising for bacalhau, people like to buy what they are listening to or watching as ads. Even if it's small pieces they would buy" (woman, Rio de Janeiro, C Class, 59 years-old)

"I live near the Rei do Bacalhau restaurant, they always do some advertising" (woman, Rio de Janeiro, C Class, 69 years-old)

"Advertising of bacalhau are always like that: 'Bacalhau Porto type per XX/kg'. I've seen those on TV, from supermarkets" (woman, Rio de Janeiro, C Class, 28 years-old)

"I have probably seen advertising of bacalhau on TV, but I really can't remember when and how it was" (woman, São Paulo, A/B Class, 56 years-old)

"I've seen an advertisement of bacalhau at Pão de Açúcar. They had an offer of olive oil and included bacalhau too" (woman, São Paulo, C Class, 26 years-old)

"I've seen ads for bacalhau in a magazine, can't remember if it was 'Caras' or 'Veja'. They spoke about recipes and showed a picture of an old man. It seems he was Portuguese" (woman, São Paulo, C Class, 58 years-old)

"(...) they showed a family gathered in an ad from Bacalhau da Noruega on TV" (woman, São Paulo, A/B Class, 34 years-old)

"I remember ads from Bacalhau da Noruega in a magazine" (woman, São Paulo, A/B Class, 28 years-old)

V.5 – Information at POS (Part 5)

- ❖ Lack of different types of information was mentioned by the participants, or at least the need of more information about specific issues. The missing items refer mostly to: origin of bacalhau, “Use by date” of the product when it’s already at the POS, differences between types, salting & desalting process, fish species, pricing, storage and color.
- ❖ Members in 10 of the 16 groups expressed a need of information about origin of bacalhau (history, etc..). In 9 groups there were complaints about the lack of “Use by” and fabrication dates. In 4 groups participants were curious to learn more about how bacalhau is produced.
- ❖ Many participants expressed doubts regarding the salt on/in bacalhau, including the reasons why bacalhau needs to contain so much salt. This and the issue of the desalting process was commented in 6 of the 16 groups. Members in 6 groups wanted more information about how to cook and prepare
- ❖ Some participants in 4 different groups wanted to know more about species because they believed “bacalhau” is not really the name of the fish;
- ❖ Comments about the possible bacalhau benefits or problems related to health was cited by some participants from 4 different groups. Others would like to have nutritional information about bacalhau;
- ❖ Doubts about bacalhau storage at home and knowing how bacalhau gets to Brazil were mentioned in a couple of groups. They also expressed curiosity & doubts about the color.
- ❖ Some participants would like to know who the producers are and also learn more about selecting bacalhau. One person criticized the lack of “contact us” info (phone number, email, etc..) on bacalhau packs. Another suggested bacalhau should come with a quality seal to distinguish between good and bad bacalhau;
- ❖ Some confusion about the difference between brand and type was evident among some participants
- ❖ In the table on the next page we have organized the findings according to groups (see beginning of document to identify cities)

MISSING INFORMATION / NEED MORE INFO

ITEMS		BH C	BH A/B	BSB C	BSB A/B	REC C	REC A/B	SAL C	SAL A/B	RJ A/B 1	RJ A/B 2	RJ C 1	RJ C 2	SP A/B 1	SP A/B 2	SP C 1	SP C 2
1. ORIGIN	Precedence																
	Origin of the names																
	History of bacalhau																
2. VALIDITY	Validity Date																
	Fabrication Date																
3. TYPES	Types of bacalhau (explanations of them)																
	Type to each dish																
	Brand x Type (distinction)																
4. SALT	Desalting process																
	Why too much salt?																
	Among types, which one has more salt?																
	Does salt really preserves bacalhau?																
5. FISH	What fish /species bacalhau is																
6. PRICE	Why is it too expensive?																
	Why Porto is the most expensive?																
7. RECEIPTS	Receipts																
8. STORAGE	Packing bacalhau came in to POS																
	How to store at home																
	How bacalhau gets here / delivery process																
9. COLOR	Color (why is it like that?)																
	Yellowish bacalhau is spoiled?																
10. HEALTH	Any restrictions to consumption?																
	Nutritional info																
	Health benefits																
	Does it have Omega 3?																
	Trans fat																
11. OTHERS	How to choose bacalhau																
	Manufacturers (who are they?)																
	Is there any "contact us" phone number?																
	Quality seal																
	Can bacalhau be frozen at home?																

6. Availability and need for information

❖ (1) Participants stated the need for more information on bacalhau, either on the labels - if they are sold on trays - or on boards/posters to be put next to the product if they are sold whole. This was mentioned in 10 of the 16 groups. They asked for more information on validity & fabrication date, types of bacalhau, origin of bacalhau, nutritional information, manufacturer, fish species, quality seal and “contact us” phone number. Some liked to get a better understanding of bacalhau history (like what is done with wines), how it is distributed and storage guidelines.



Label / Pack



Poster

❖ (2) In 6 of the 16 groups, participants asked for more information using flyers/folders in the supermarkets. Today, they only observe price promotions. They believe this is an info channel that should be used to answer questions related to doubts, needs and curiosities about bacalhau.

Flyers/Folders





❖(3) Participants in 8 different groups suggested one should have a promoter for bacalhau in supermarkets.



Promoters & Tastings

Use of Mass Media

❖ (1) Participants in 4 different groups suggested more advertising/information for bacalhau on TV, mainly to answer their doubts & myths about bacalhau

❖ (2) Reports and news about bacalhau on TV as well as bacalhau being presented more often in culinary programs on TV were mentioned in 5 different groups.



In the table below we have organized the findings according to groups (see beginning of document to identify cities)

Means Information Should be Divuligated

ITEMS		BH C	BH A/B	BSB C	BSB A/B	REC C	REC A/B	SAL C	SAL A/B	RJ A/B 1	RJ A/B 2	RJ C 1	RJ C 2	SP A/B 1	SP A/B 2	SP C 1	SP C 2
SUPERMARKET	Supermarkets' folders																
	Promoters in the supermarket																
	Degustation in supermarket																
	Poster aside of the product																
	Specialist in the supermarket																
	On bacalhau pack / tag																
NEWSPAPER	Newspaper																
TV	TV reports / news																
	TV propaganda																
	Culinary Programs on TV																
OTHER	Folders in pubs and beaches																



Citations:

"They should inform us about how to identify the best quality bacalhau for consumption" (woman, Recife, A/B Class, 55 years-old)

"If more information were available, I will be less worried when buying bacalhau" (woman, Belo Horizonte, C Class, 31 years-old)

"There is nobody at the points of sales to explain if that bacalhau we're buying is of quality, there is no advise" (woman, Belo Horizonte, C Class, 36 years-old)

"I believe if supermarkets train someone to guide us on bacalhau, its expiration date, its type, that would be great" (woman, Belo Horizonte, C Class, 48 years-old)

"If you go to the butchery, they tell us 'don't buy that meat because it's too hard, etc. If you ask them, they help you, this is the kind of information I'd like to receive about bacalhau'" (woman, Belo Horizonte, C Class, 55 years-old)

"Nutritional information is important too, fat, etc.." (woman, Belo Horizonte, C Class, 43 years-old)

"In the supermarkets, you don't get any information about bacalhau" (woman, Belo Horizonte, A/B Class, 59 years-old)

"I'd like to know if bacalhau really is a fish and if it has scales" (woman, Belo Horizonte, A/B Class, 45 years-old)

"I wonder why it has to have that much salt..." (woman, Belo Horizonte, A/B Class, 26 years-old)

"They should show a picture of the 'animal' itself, the fish itself, so we can make sure it's a fish, and also distinguish the differences among them" (woman, Belo Horizonte, A/B Class, 38 years-old)

"I think they should explain which bacalhau types to be used for each recipe, because we keep thinking it can only be used for bolinhos and soaked" (woman, Belo Horizonte, A/B Class, 41 years-old)

"At first, they should 'kill' that myth saying bacalhau should only be eaten at Christmas, New Years and Easter. My family eats more because we're of Portuguese origin" (woman, Belo Horizonte, A/B Class, 48 years-old)

"They should include information about type, to what dishes and how to prepare on the labels on the packs" (woman, Belo Horizonte, A/B Class, 53 years-old)

"We don't know the difference between brand and type" (woman, Brasília, C Class, 64 years-old)

"They should have a promoter inside the supermarkets helping us, as they do when a product is to be launched" (woman, Brasília, C Class, 27 years-old)

"They should do tastings, for example, serving grilled bacalhau for us to taste it" (woman, Brasília, C Class, 36 years-old)

"They should tell us what is the best way of preparing it. They sell it as desfiado, lascas, entire, etc. We see all that, but we don't know which to select for a specific recipe" (woman, Brasília, C Class, 28 years-old)

Citations:

"There used to be a TV program showing the sea and the difficulty to get tuna fish I think they could present us, as a curiosity, where bacalhau comes from and how it gets here" (woman, Brasília, A/B Class, 27 years-old)

"They should tell us where bacalhau comes from and if everybody can eat it without restrictions" (woman, Brasília, A/B Class, 64 years-old)

"Why are they called Ling, Porto, etc..?" (woman, Brasília, A/B Class, 38 years-old)

"In what kind of packages do they come to the supermarkets? I'm curious about that" (woman, Brasília, A/B Class, 45 years-old)

"I would also like to know in which packs bacalhau come, because when you buy read meat, you can buy it fresh at the counter or in vacuum packs. The appearance and taste are different" (woman, Brasília, A/B Class, 54 years-old)

"They should put up a poster near bacalhau telling about the origin and nutritional value" (woman, Brasília, A/B Class, 51 years-old)

"They should do like it's done with wine: they present its history, how old it is, how it was made, etc.. Since bacalhau goes well with wine, they should do the same" (woman, Brasília, A/B Class, 36 years-old)

"I wonder why bacalhau is so salty and so expensive" (woman, Brasília, A/B Class, 38 years-old)

"I think all labels on the packs should be standardized" (woman, Brasília, A/B Class, 41 years-old)

"I would like to know which ways of preparing it is most healthy" (woman, Brasília, A/B Class, 54 years-old)

"I think they should show us how to select bacalhau" (woman, Recife, C Class, 48 years-old)

"I would like to know about Saithe, everybody talks about it, but up to now I only know it is the thinnest. I don't really know what it is" (woman, Recife, C Class, 38 years-old)

"They should tell us the history of bacalhau, how the process is to get here. Where do they catch it etc. I think it is not called bacalhau, I think the fish has another name. Bacalhau is only after salting it..." (woman, Salvador, A/B Class, 25 years-old)

"They distribute folders in the supermarket explaining precedence, type, history, etc..." (woman, Salvador, A/B Class, 51 years-old)

"For bacalhau sold whole, we don't have the info on the labels, because that info is on the boxes bacalhau was brought in. They should find a way of informing that to us" (woman, São Paulo, A/B Class, 49 years-old)

"I think Zarbo and Ling should be better explained to us. They say it is bacalhau, but there aren't any explanations about them for people to understand" (woman, São Paulo, A/B class, 59 years-old)

"In supermarkets, I've seen 2 types of Ling on trays: One thick and one thin. They had a label saying both were Ling, but we don't really know, so we need to know more about how to recognize brands" (woman, São Paulo, A/B class, 35 years-old)

"They should explain the difference among the types, their different qualities, there are only expiration date and we don't know the differences" (woman, São Paulo, A/B class, 32 years-old)

Citations:

"They should promote bacalhau in the supermarkets with promoters and on TV: If you see it on TV, that keeps it in your mind, then you go and look for in the supermarkets" (woman, São Paulo, A/B Class, 27 years-old)

"They should inform us about which types are better for certain recipes" (woman, São Paulo, C Class, 68 years-old)

"I would like to learn more about desalting,. Once I used so much water that the salt disappeared. When I served it, I needed to put a saltshaker on the table" (woman, São Paulo, C Class, 46 years-old)

"They should tell us how long bacalhau has been exposed in the shop. It is there conserved in the salt, but we don't know for how long" (woman, São Paulo, C Class, 38 years-old)

"I'm used to take a look at expiration date, nutritional info, trans fat, so I'd like to have that information" (woman, Rio de Janeiro, A/B Class, 48 years-old)

"They should inform about the benefits bacalhau brings to health" (woman, São Paulo, C Class, 41 years-old)

"We need to know the "use by date". I think this is the most important" (woman, Rio de Janeiro, A/B class, 26 years-old)

"I would like to know how bacalhau comes here, from catch to when it gets here" (woman, Rio de Janeiro, C Class, 54 years-old)

"I would like to know if a too yellowish bacalhau is spoiled" (woman, Rio de Janeiro, C Class, 32 years-old)

"I would like to know if salt really preserves bacalhau" (woman, Rio de Janeiro, C Class, 41 years-old)

"I would like to know if there is another way of desalting, other than putting it into water" (woman, Rio de Janeiro, C Class, 33 years-old)



VI – SUMMARY



- ❖ Bacalhau associations were primarily dishes/recipes and festive moments (Easter and Christmas).
- ❖ Among those who had any ideas about provenance, Noruega and Portugal were mentioned. One mentioned Chile while the rest had unclear opinions or no opinions at all on the matter
- ❖ Porto and Saithe were recognized by the majority. Zarbo and Ling were much less known and not mentioned at all among the participants in the Northeast cities. In all groups, we observed participants who did not know about any type and others who mixed up types and brands;
- ❖ Porto was clearly regarded as being the best bacalhau, the whitest, the thickest, the most expensive and the best for making sophisticated dishes and also to impress guests. Saithe was recognized as the cheapest one, the thinnest one, the darkest one, the saltiest one and the one having most bones/spines. Saithe was mostly used for bolinhos, salads or other recipes demanding desfiado/lascas. Since Zarbo and Ling was recognized by few, practically no associations came up related to these species.
- ❖ Easter, Christmas & New Years are the main occasions for consuming bacalhau, independent of social class. Consumption is also connected to birthday parties, Mothers' Day & weekends. Bacalhau is regarded as expensive and this, together with a feeling that it is almost a tradition not to eat bacalhau outside the occasions mentioned, was regarded as the main barriers for a more frequent consumption. There was a tendency that class A/B had started to buy & eat bacalhau more frequent than class C class. Bacalhau was also considered to be difficult to prepare, contributing/explaining to some extent the low consumption rate.
- ❖ When selecting bacalhau at POS, the main attributes to be considered were: **color** (the whiter, the better), **thickness** (the thicker, the better), different cuts (each cut is suitable for specific dishes and bacalhau loin was the piece mostly appreciated), possibility of buying smaller amounts on trays, selecting pieces with no skins & less spines and selecting product to match personal economy and recipe. Some said they used amount of visible salt, moisture/dryness, texture, smell when selecting

- ❖ Mother was the main source for learning about bacalhau. Some people have gained information from TV and culinary programs
- ❖ **Supermarkets** are the main places for buying bacalhau due to practicality (you do most of your shopping there, anyway), bacalhau is always present, supermarkets are everywhere, sanitation conditions are good. A minority preferred buying bacalhau in **public markets** – when the city has a good one (examples are Belo Horizonte and São Paulo), due to the feeling that the POS have more well-informed sales people and the possibility of selecting the best pieces. In Rio de Janeiro and Brasília some preferred buying in **specialized stores** for the same reason the others buy in public markets. All the participants rejected buying at **open markets**, mainly due to lack of hygiene.
- ❖ A general complaint is that **price, weight** and **name** of bacalhau are usually the only product information given, divulged either on bacalhau packs in the point of sales or in media communications. A majority asks for more information than what is offered today, not only information like validity & fabrication date, but provenance, type of bacalhau and nutritional information. Bacalhau seems also to be surrounded by myths and more facts about bacalhau itself was also asked for. Maybe telling stories like they do with wine, was one example. Other examples of information was how bacalhau is made and how it ends up in Brazil, which fish species is used for making bacalhau, what are the differences among types, which bacalhau is the best for each recipe, how to select/which quality attributes to look for, why it is so expensive, why so much salt, how to do the desalting process and how consumption could benefit health,
- ❖ The information asked for in the above paragraph should mainly be divulged at POS, on bacalhau packages, posters/boards next to the product, trained sales people as well as promoters giving information, new receipts and also offer tastings. Programs/propaganda on TV about myths/curiosities/doubts was also required, either institutional propaganda, propaganda at POS and/or through culinary programs or educational news.
- ❖ In general, the participants “missed” more propaganda/notice of bacalhau especially outside Christmas, New Year and Easter. This made them “forget” that bacalhau could be an alternative all the year around.
- ❖ A general impression was that the participants had very limited knowledge about bacalhau, but had no problems buying, preparing and serving it. It is also worth noting that the tradition of eating bacalhau is related to certain annual festive moments, and the relation seems so close that it is almost a tradition to not have bacalhau outside the same moments.

Concluding remarks

The objective of the study was to gain a deeper understanding of the information cues Brazilian consumers use when they are purchasing, preparing and consuming bacalhau. Although the participants expressed that they had very limited knowledge about bacalhau, they had been recruited to the study because they had bought, prepared and consumed bacalhau at least once 3 months prior to the study.

It is also worth noting that the tradition of eating bacalhau is very much associated to certain annual festive moments, and the relation seems so close that it is almost a tradition to not have bacalhau outside the same moments. With more knowledge and competence, and more “reminders” from POS and media in the low season, one could expect more consumers to find bacalhau being an attractive alternative independent of Easter and Christmas.

Bacalhau is one of the more expensive food items one can purchase in Brazil. The combination of a high product price and oneself feeling less able to prepare bacalhau with success, could also be an obstacle for consumption outside occasions that is looked upon as compulsory. More information and product concepts helping consumers to feel more confident could also help boost the consumption in the low season



