

Alternative Shellfish Species Research Study

Prepared for:



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Center for Marketing Research



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Executive Summary

- Seventy-seven percent of shellfish wholesalers said that none of their sales come from grocery stores, 8% said 1%-25%, 7% said 26%-50%, 1% said 51%-75%, no one said 76% or more and 8% had no response.
- Forty-one percent of shellfish wholesalers said none of their sales come from restaurants, 20% said 1%-25%, 18% said 26%-50%, 6% said 51%-75%, 6% said 76%-99%, 3% said all of their sales come from restaurants and 8% had no response.
- Twenty percent of shellfish wholesalers said none of their sales come from other wholesalers, 15% said 1%-25%, 17% said 26%-50%, 11% said 51%-75%, 9% said 76%-99%, 21% said all of their sales come from other wholesalers and 8% had no response.
- Eighty-two percent of shellfish wholesalers said none of their sales come from specialty seafood stores, 9% said 1%-25%, 0% said 26%-50%, 0% said 51%-75%, 1% said 76%-99%, no one said all of their sales come from specialty seafood stores and 8% had no response.
- Seventy-one percent of shellfish wholesalers said none of their sales come from other retail stores, 4% said 1%-25%, 6% said 26%-50%, 1% said 51%-75%, 5% said 76%-99%, 8% said all of their sales come from other retail stores and 7% had no response.
- Thirty-five percent of shellfish wholesalers said none of their inventory is driven by customer requests, 15% said 1%-25%, 10% said 26%-50%, 2% said 51%-75%, 1% said 76%-99%, 23% said their entire inventory is driven by customer requests and 14% had no response.
- Nineteen percent of shellfish wholesalers said none of their inventory is driven by consistent availability, 3% said 1%-25%, 7% said 26%-50%, 7% said 51%-75%, 13% said 76%-99%, 38% said their entire inventory is driven by consistent availability and 14% had no response.
- Thirty-five percent of shellfish wholesalers said they had requests for shellfish they could not fulfill due to a lack of supply and 65% said they have not.
- Eighty-four percent of shellfish wholesalers said they have never sold Blood Arks or Blood Clams in the past, 9% said they have sold them in the past and 7% said they are currently selling Blood Arks or Blood Clams.

- Sixty-two percent of shellfish wholesalers said that they have never sold Razor Clams, 21% said they have sold them in the past and 17% said they are currently selling Razor Clams.
- Eighty-three percent of shellfish wholesalers said they have never sold Juvenile Surf Clams (Butter Clams), 11% said they have sold them in the past and 6% said they are currently selling Juvenile Surf Clams (Butter Clams).
- Seventy-seven percent of shellfish wholesalers said they have never sold 'Brown' Blue Mussels, 8% said they have sold them in the past and 15% said they are currently selling 'Brown' Blue Mussels.
- Ninety-three percent of shellfish wholesalers said they have never sold Sweetmeats or Slipper Shells, 7% said they have sold them in the past and 1% said they are currently selling Sweetmeats or Slipper Shells.
- Seventy-eight percent of shellfish wholesalers said they have never sold Seaweeds, 9% said they have sold them in the past and 13% said they are currently selling Seaweeds.
- Fifteen percent of shellfish wholesalers said they would be interested in selling Blood Arks or Blood Clams if they were grown locally and reliable in supply, 17% said they are somewhat interested and 68% said they are not interested.
- Twenty-six percent of shellfish wholesalers said they would be interested in selling Razor Clams if they were grown locally and reliable in supply, 22% said they are somewhat interested and 53% said they are not interested.
- Seventeen percent of shellfish wholesalers said they would be interested in selling Juvenile Surf Clams if they were grown locally and reliable in supply, 26% said they are somewhat interested and 57% said they are not interested.
- Twenty-one percent of shellfish wholesalers said they would be interested in selling 'Brown' Blue Mussels if they were grown locally and reliable in supply, 23% said they are somewhat interested and 57% said they are not interested.
- Fourteen percent of shellfish wholesalers said they would be interested in selling Sweetmeats or Slipper Shells if they were grown locally and reliable in supply, 23% said they are somewhat interested and 63% said they are not interested.
- Twenty percent of shellfish wholesalers said they would be interested in selling Seaweeds if they were grown locally and reliable in supply, 14% said they are somewhat interested and 66% said they are not interested.

- Fifteen percent of shellfish wholesalers think their customers would be very interested in purchasing Blood Arks or Blood Clams, 22% think they would be somewhat interested and 63% think they would not be interested.
- Thirty-two percent of shellfish wholesalers think their customers would be very interested in purchasing Razor Clams, 20% think they would be somewhat interested and 48% think they would not be interested.
- Seventeen percent of shellfish wholesalers think their customers would be very interested in purchasing Juvenile Surf Clams, 30% think they would be somewhat interested and 53% think they would not be interested.
- Twenty-two percent of shellfish wholesalers think their customers would be very interested in purchasing 'Brown' Blue Mussels, 26% think they would be somewhat interested and 53% think they would not be interested.
- Fifteen percent of shellfish wholesalers think their customers would be very interested in purchasing Sweetmeats or Slipper Shells, 26% think they would be somewhat interested and 59% think they would not be interested.
- Twenty-four percent of shellfish wholesalers think their customers would be very interested in purchasing Seaweeds, 20% think they would be somewhat interested and 57% think they would not be interested.
- Fifty percent of shellfish wholesalers said that if these alternative species were in a readily available supply they would actively market them to build demand, 47% said they would not and 3% had no response.
- Forty-seven percent of shellfish wholesalers said they would need more customer demand to have interest in selling alternative species, 43% said they have no interest in selling these species, 40% said they need a more reliable supply, 32% said they need more market demand, 26% said they need better price margin and 5% said they would need something else.

Research Objective

RESEARCH OBJECTIVE:

To research the demand for alternative species of shellfish among wholesalers throughout Massachusetts.

This research attempts to provide insights into the following:

- ❖ Are wholesalers aware of the 6 proposed species?
- ❖ Would wholesalers be interested in selling or have they sold these species with success?
- ❖ What is the perceived demand for alternative species?
- ❖ Is demand driven by customer request or consistent availability?

Methodology

RESEARCH DESIGN	Survey
RESEARCH METHOD	Telephone Interviews
SAMPLING DESIGN	Probability
SAMPLING METHOD	Systematic random sample through wholesaler list on www.mass.gov
SAMPLE POPULATION	Number of shellfish wholesalers in Massachusetts (N=217)
DATA COLLECTION PERIOD	October 2014
SAMPLE SIZE	After adjusting for wholesalers who do not sell shellfish, closed for the season or out of business, the potential wholesalers for this study was 108. Survey results are based on 106 seafood wholesalers.

Alternative Shellfish Species Survey
*Conducted by the University of Massachusetts Dartmouth Charlton College of Business
Center for Marketing Research*

Hello, my name is _____. I am a student at the University of MA Dartmouth doing a survey on alternative shellfish species to help assess market potential if they were to be grown commercially here in MA. I would appreciate your input so that we might be able to provide SEMAC (Southeastern MA Aquaculture Center) with important information to help the industry.

Do you sell shellfish?

Yes _____ No _____ *(If no, discontinue survey)*

1. What percent of your shellfish sales come from each of the following?

Grocery Stores _____ %

Restaurants _____ %

Wholesalers _____ %

Specialty Seafood Stores _____ %

Other _____ % **Please Specify:** _____

2. What percent of your inventory is driven by customer requests and/or consistent availability?

Customer Requests _____ % Consistent Availability _____ %

3. In order of preference, what shellfish are most requested by your customers?

1) _____ 3) _____ 5) _____

2) _____ 4) _____ 6) _____

4. Do you have requests for shellfish you could not fulfill due to a lack of supply?

Yes _____ No _____ *(If no, skip to question 6)*

5. What shellfish do you have the most difficulty supplying?

6. Do you currently, or have you in the past, sold any of the following alternative species?

	Have Never Sold	Sold in the Past	Why are you currently not selling?	Curren tly Selling	If you are currently selling, what is the average price you paid this past season?
Blood Arks or Blood Clams					\$____ per piece
Razor Clams					\$____ per piece
Juvenile Surf Clams – “Butter Clams” (Smaller than size currently available)					\$____ per piece
‘Brown’ Blue Mussels – Specialty color farmed product					\$____ per piece
Sweetmeats or Slipper Shells					\$____ per piece
Seaweeds					\$____ per lb.

7. How interested would you be in selling these alternative species if they were grown locally and reliable in supply?

	Very Interested	Somewhat Interested	Not Interested
Blood Arks or Blood Clams			
Razor Clams			
Juvenile Surf Clams			
‘Brown’ Blue Mussels			
Sweetmeats or Slipper Shells			
Seaweeds			

8. How interested do you think your customers would be in purchasing these alternative species if they were available?

	Very Interested	Somewhat Interested	Not Interested
Blood Arks or Blood Clams			
Razor Clams			
Juvenile Surf Clams			
‘Brown’ Blue Mussels			
Sweetmeats or Slipper Shells			
Seaweeds			

9. If these alternative species were in a readily available supply would you actively market them to build demand?

Yes_____ No_____

10. If you have sold any of these alternative species in the past, was it a specialty or ethnic market? If so, please describe the market.

11. If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?

(Check all that apply)

More Market Information_____

More Reliable Supply_____

Better Price Margin_____

Increased Customer Demand_____

No Interest in Selling these Species_____

Other_____ Please Specify: _____

12. Is there anything you could suggest to help SEMAC build a demand for these species?

TO BE FILLED OUT BY STUDENT FROM WHOLESALER LIST

Wholesaler: _____

Street Address: _____

City/Town: _____

State: _____

Zip Code: _____

Phone Number: _____

Significance Test

Test Statistics			
	What percent of your shellfish sales come from each of the following? (Grocery Stores)	Do you currently, or have you in the past, sold any of the following alternative species? (Blood Arks or Blood Clams)	How interested would you be in selling these alternative species if they were grown locally and reliable in supply? (Sweetmeats or Slipper Shells)
Chi-Square	219.566 ^a	122.396 ^b	43.717 ^b
df	4	2	2
Asymp. Sig.	.000	.000	.000

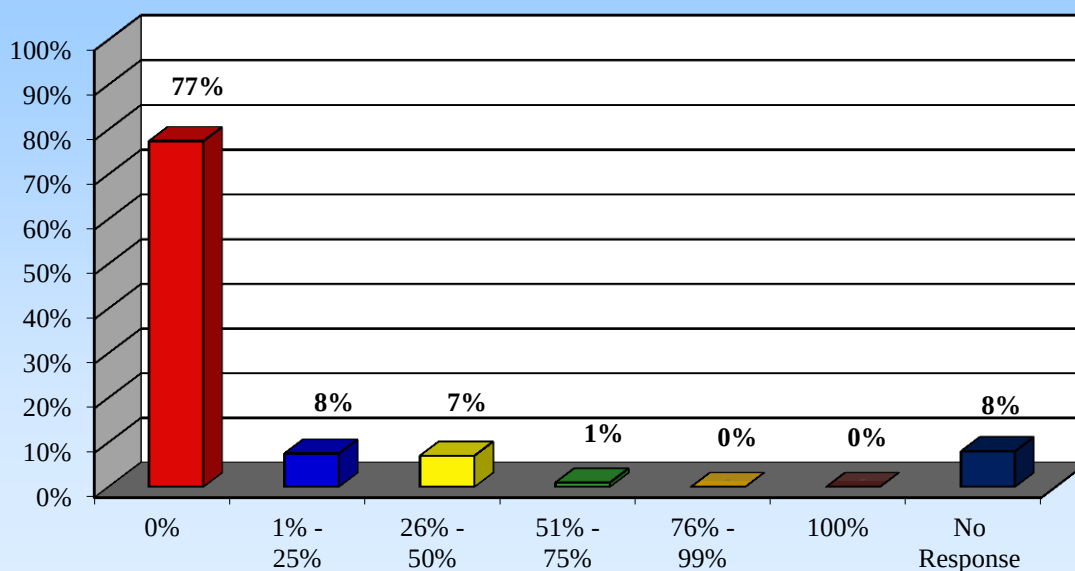
A Chi-Square test was performed on this data. The data in this study test significant at .000, which indicates the findings are statistically valid.

Question 1a: What percent of your shellfish sales come from the following?
(Grocery Stores)

What percent of your shellfish sales come from the following?
(Grocery Stores)

	Frequency	Percent	Valid Percent	Cumulative Percent
0%	82	77.4	77.4	77.4
1% - 25%	8	7.5	7.5	84.9
26% - 50%	7	6.6	6.6	91.5
51% - 75%	1	.9	.9	92.5
No Response	8	7.5	7.5	100.0
Total	106	100.0	100.0	

What percent of your shellfish sales come from the following?
(Grocery Stores)



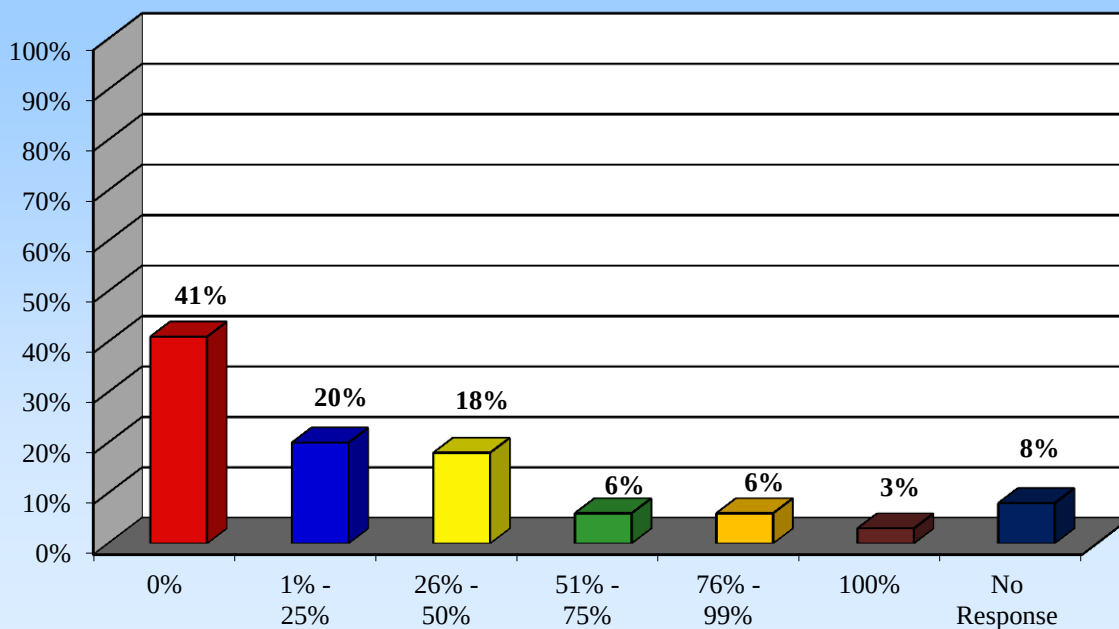
Seventy-seven percent of shellfish wholesalers said that none of their sales come from grocery stores, 8% said 1%-25%, 7% said 26%-50%, 1% said 51%-75%, no one said 76% or more and 8% had no response.

Question 1b: What percent of your shellfish sales come from the following?
(Restaurants)

What percent of your shellfish sales come from the following?
(Restaurants)

	Frequency	Percent	Valid Percent	Cumulative Percent
0%	43	40.6	40.6	40.6
1% - 25%	21	19.8	19.8	60.4
26% - 50%	19	17.9	17.9	78.3
51% - 75%	6	5.7	5.7	84.0
76% - 99%	6	5.7	5.7	89.6
100%	3	2.8	2.8	92.5
No Response	8	7.5	7.5	100.0
Total	106	100.0	100.0	

What percent of your shellfish sales come from the following?
(Restaurants)



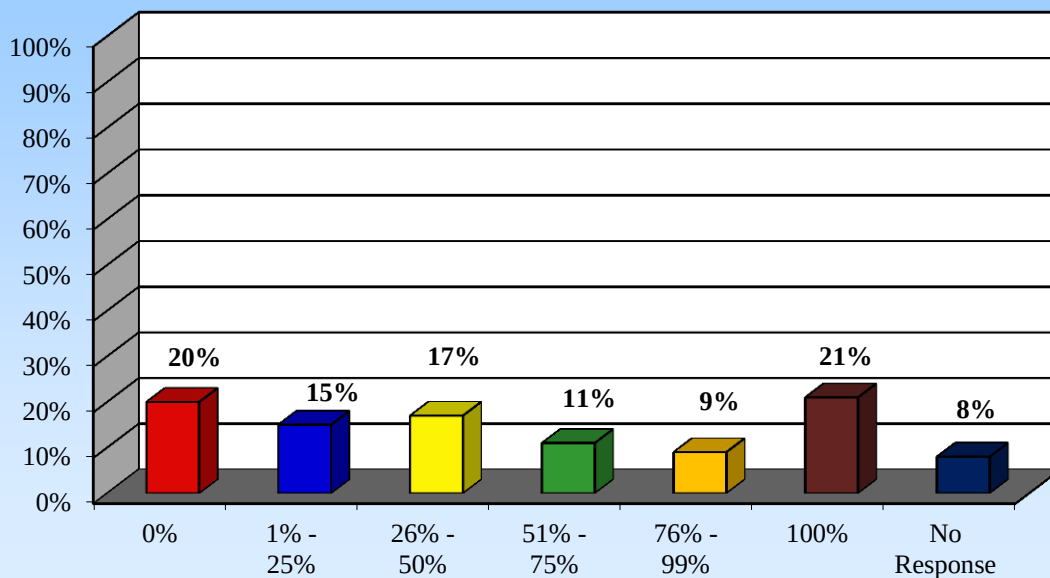
Forty-one percent of shellfish wholesalers said none of their sales come from restaurants, 20% said 1%-25%, 18% said 26%-50%, 6% said 51%-75%, 6% said 76%-99%, 3% said all of their sales come from restaurants and 8% had no response.

Question 1c: What percent of your shellfish sales come from the following?
(Wholesalers)

What percent of your shellfish sales come from the following?
(Wholesalers)

	Frequency	Percent	Valid Percent	Cumulative Percent
0%	21	19.8	19.8	19.8
1% - 25%	16	15.1	15.1	34.9
26% - 50%	18	17.0	17.0	51.9
51% - 75%	12	11.3	11.3	63.2
76% - 99%	9	8.5	8.5	71.7
100%	22	20.8	20.8	92.5
No Response	8	7.5	7.5	100.0
Total	106	100.0	100.0	

What percent of your shellfish sales come from the
following?
(Wholesalers)



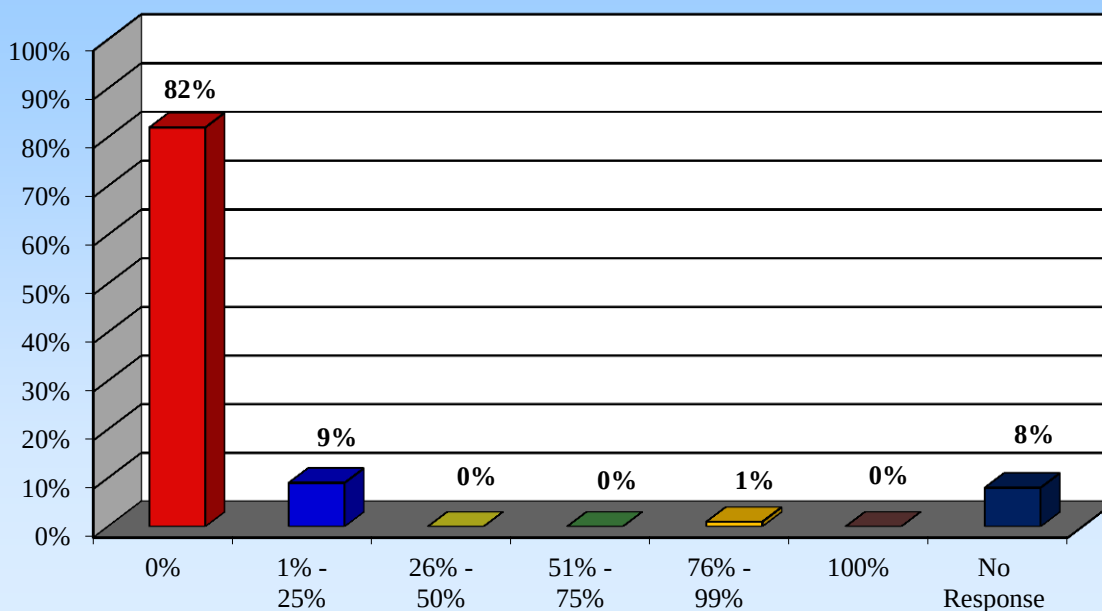
Twenty percent of shellfish wholesalers said none of their sales come from other wholesalers, 15% said 1%-25%, 17% said 26%-50%, 11% said 51%-75%, 9% said 76%-99%, 21% said all of their sales come from other wholesalers and 8% had no response.

Question 1d: What percent of your shellfish sales come from the following?
(Specialty Seafood Stores)

What percent of your shellfish sales come from the following?
(Specialty Seafood Stores)

	Frequency	Percent	Valid Percent	Cumulative Percent
0%	87	82.1	82.1	82.1
1% - 25%	10	9.4	9.4	91.5
Valid 76% - 99%	1	.9	.9	92.5
No Response	8	7.5	7.5	100.0
Total	106	100.0	100.0	

What percent of your shellfish sales come from the following?
(Specialty Seafood Stores)

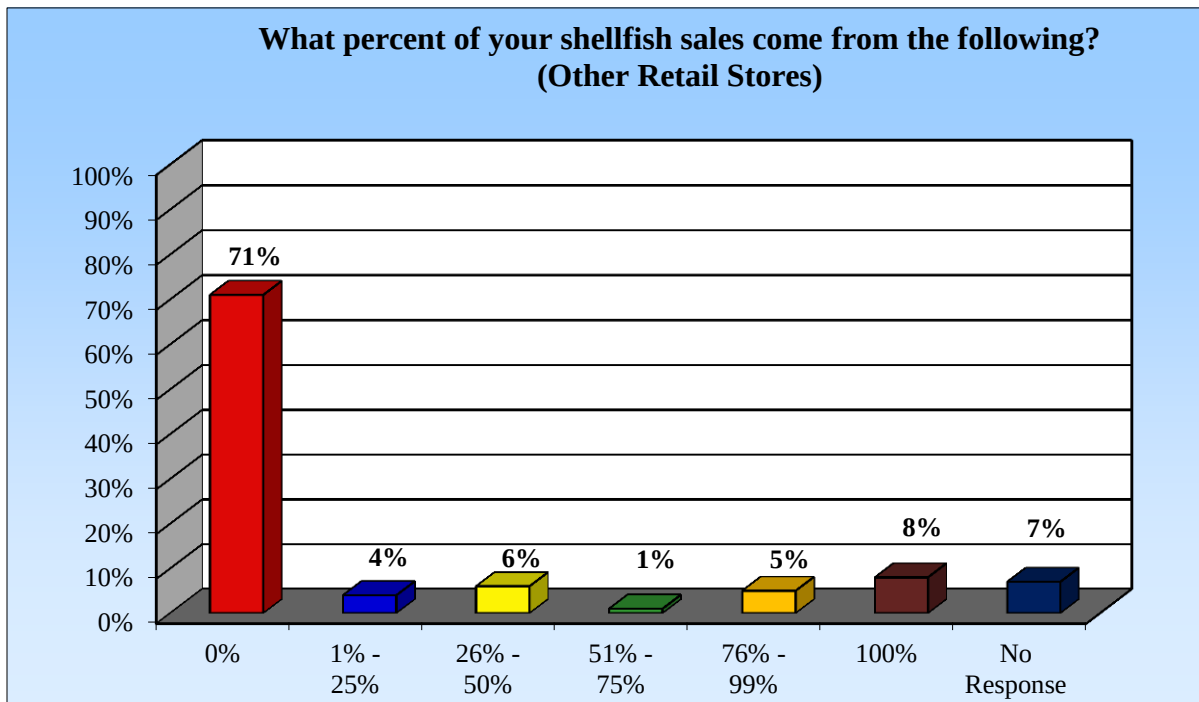


Eighty-two percent of shellfish wholesalers said none of their sales come from specialty seafood stores, 9% said 1%-25%, 0% said 26%-50%, 0% said 51%-75%, 1% said 76%-99%, no one said all of their sales come from specialty seafood stores and 8% had no response.

Question 1e: What percent of your shellfish sales come from the following?
(Other Retail Stores)

What percent of your shellfish sales come from each of the following?
(Other Retail Stores)

	Frequency	Percent	Valid Percent	Cumulative Percent
0%	75	70.8	70.8	70.8
1% - 25%	4	3.8	3.8	74.5
26% - 50%	6	5.7	5.7	80.2
51% - 75%	1	.9	.9	81.1
Valid 76% - 99%	5	4.7	4.7	85.8
100%	8	7.5	7.5	93.4
No Response	7	6.6	6.6	100.0
Total	106	100.0	100.0	



Seventy-one percent of shellfish wholesalers said none of their sales come from other retail stores, 4% said 1%-25%, 6% said 26%-50%, 1% said 51%-75%, 5% said 76%-99%, 8% said all of their sales come from other retail stores and 7% had no response.

Question 1e: What percent of your shellfish sales come from the following?
(Other)

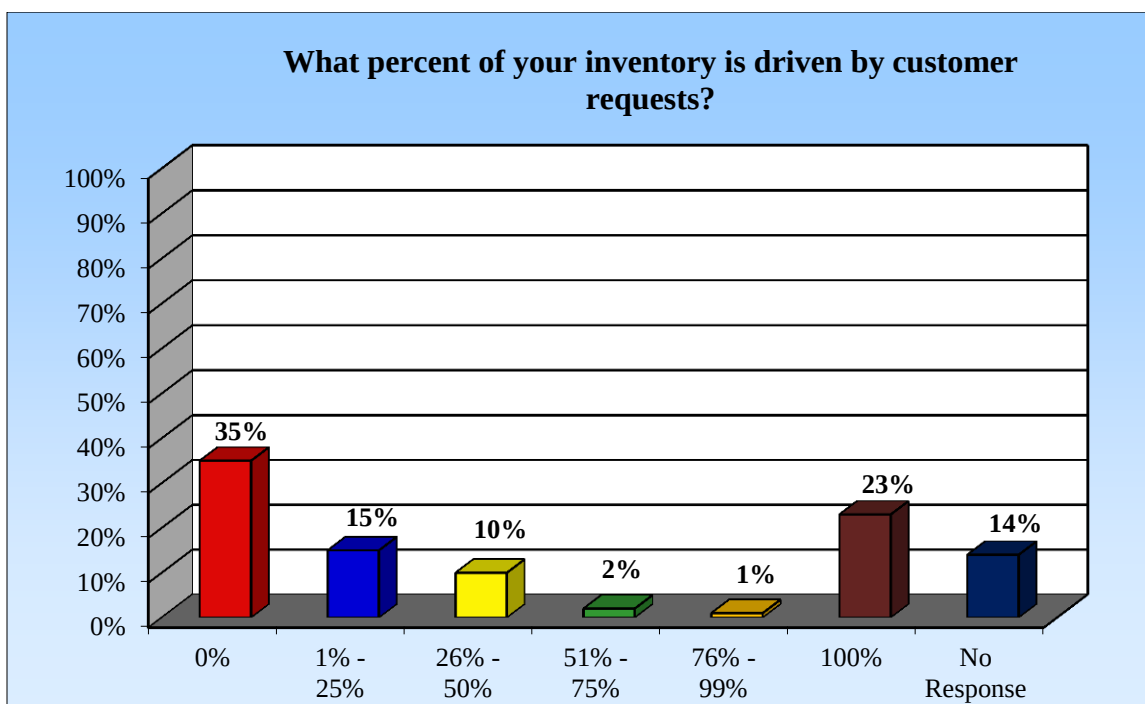
Response

- 2%
- 10%
- 25%
- 38%
- 100% (Directly from Fisherman)
- 100% (Pet Food)
- 80% (Directly from Fisherman)

Question 2a: What percent of your inventory is driven by customer requests?

What percent of your inventory is driven by customer requests and/or consistent availability?
(Customer Request)

	Frequency	Percent	Valid Percent	Cumulative Percent
0%	37	34.9	34.9	34.9
1% - 25%	16	15.1	15.1	50.0
26% - 50%	11	10.4	10.4	60.4
51% - 75%	2	1.9	1.9	62.3
76% - 99%	1	.9	.9	63.2
100%	24	22.6	22.6	85.8
No Response	15	14.2	14.2	100.0
Total	106	100.0	100.0	

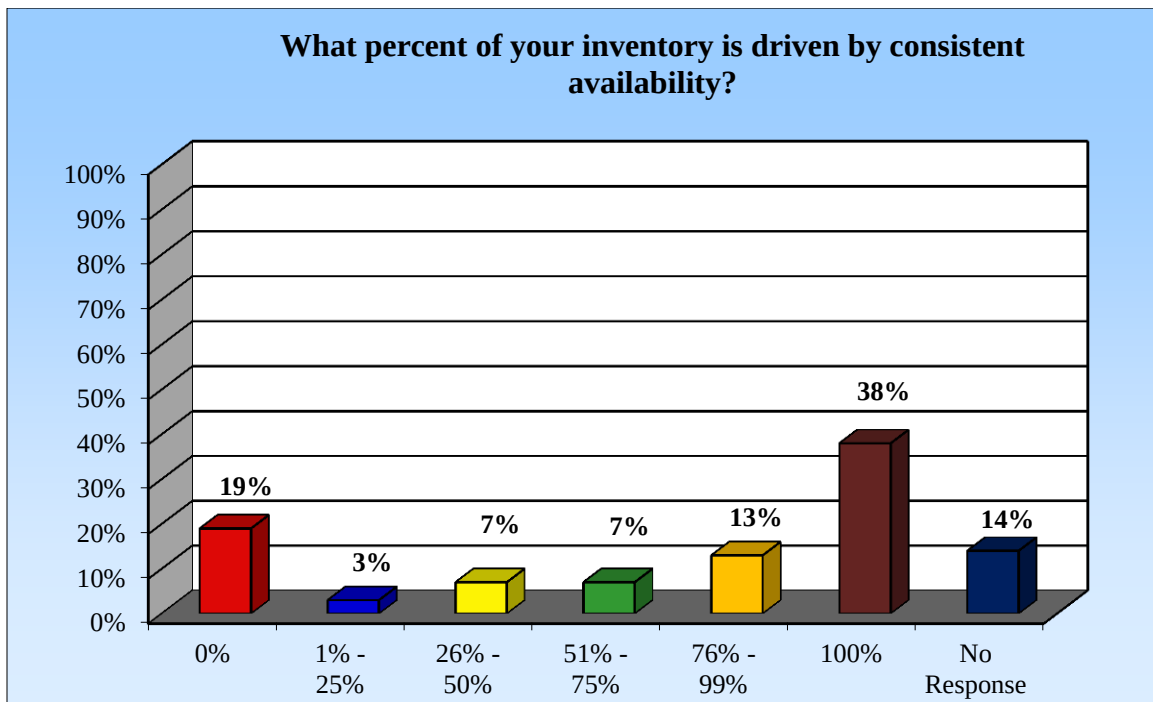


Thirty-five percent of shellfish wholesalers said none of their inventory is driven by customer requests, 15% said 1%-25%, 10% said 26%-50%, 2% said 51%-75%, 1% said 76%-99%, 23% said their entire inventory is driven by customer requests and 14% had no response.

Question 2b: What percent of your inventory is driven by consistent availability?

**What percent of your inventory is driven by customer requests and/or consistent availability?
(Consistent Availability)**

	Frequency	Percent	Valid Percent	Cumulative Percent
0%	20	18.9	18.9	18.9
1% - 25%	3	2.8	2.8	21.7
26% - 50%	7	6.6	6.6	28.3
51% - 75%	7	6.6	6.6	34.9
76% - 99%	14	13.2	13.2	48.1
100%	40	37.7	37.7	85.8
No Response	15	14.2	14.2	100.0
Total	106	100.0	100.0	



Nineteen percent of shellfish wholesalers said none of their inventory is driven by consistent availability, 3% said 1%-25%, 7% said 26%-50%, 7% said 51%-75%, 13% said 76%-99%, 38% said their entire inventory is driven by consistent availability and 14% had no response.

Question 3: In order of preference, what shellfish are most requested by your customers? (Shellfish #1)
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<u>Response</u>	<u>Frequency</u>
Oysters	(30)
Lobsters	(19)
Scallops	(12)
Steamers	(11)
Soft Shell Clams	(7)
Hard Shell Calms	(5)
Bay Scallops	(3)
Quahogs	(3)
Sea Scallops	(3)
Crabs	(2)
Little Necks	(2)
Mussels	(2)
Shrimp	(2)
North Atlantic Scallops	(1)
Red Crab	(1)
Small Clam	(1)
Surf Clams	(1)
Whelks	(1)
Total Responses	106

Question 3b: In order of preference, what shellfish are most requested by your customers?
(Shellfish #2)

<u>Response</u>	<u>Frequency</u>
Oysters	(12)
Mussels	(7)
Lobster	(6)
Soft Shell Clams	(6)
Razor Clams	(5)
Clams	(4)
Crab	(4)
Scallops	(4)
Quahogs	(3)
Steamers	(3)
Bay Scallops	(2)
Hard Shell Clams	(2)
Little necks	(2)
Butter Clams	(1)
Chilean Mussels	(1)
Rock Crab	(1)
Sea Scallops	(1)
Surf Clams	(1)
Total Responses	65

Question 3c: In order of preference, what shellfish are most requested by your customers?
(Shellfish #3)

<u>Response</u>	<u>Frequency</u>
Mussels	(7)
Oysters	(7)
Scallops	(6)
Little Necks	(5)
Steamers	(4)
Crab	(2)
Soft Shell Clams	(2)
Bay Scallops	(1)
Clams	(1)
Conch	(1)
Count Necks	(1)
Hard Shell Clams	(1)
Quahogs	(1)
Razor Clams	(1)
Surf Clams	(1)
Total Responses	41

Question 3d: In order of preference, what shellfish are most requested by your customers?
(Shellfish #4)

<u>Response</u>	<u>Frequency</u>
Hard Shell Clams	(2)
Mussels	(2)
Quahogs	(2)
Cherrystones	(1)
Clams	(1)
Conch	(1)
Crab	(1)
Little Necks	(1)
Lobsters	(1)
Oysters	(1)
Shrimp	(1)
Soft Shell Clams	(1)
Whelks	(1)
Total Responses	16

Question 3e: In order of preference, what shellfish are most requested by your customers?
(Shellfish #5)

<u>Response</u>	<u>Frequency</u>
Mussels	(2)
Oysters	(2)
Clams	(1)
Crab	(1)
Steamers	(1)
West Coast Species	(1)
Total Responses	8

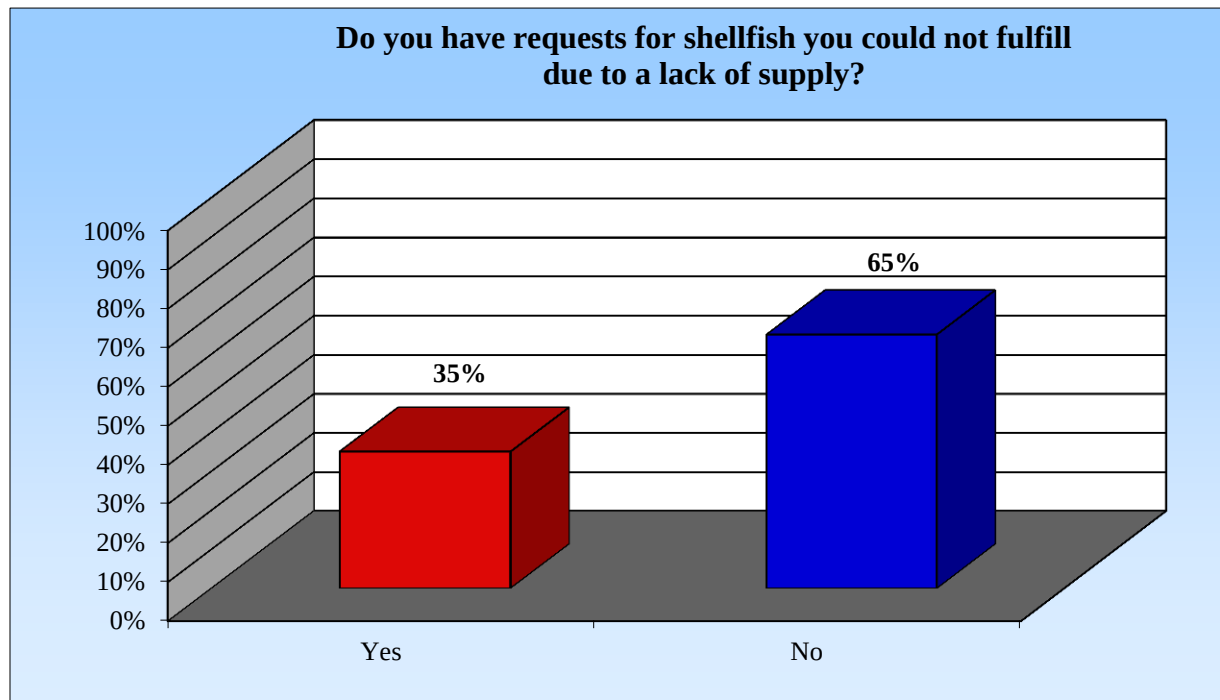
Question 3f: In order of preference, what shellfish are most requested by your customers?
(Shellfish #6)

<u>Response</u>	<u>Frequency</u>
Lobster	(1)
Mussels	(1)
Quahogs	(1)
Scallops	(1)
Shrimp	(1)
Urchin	(1)
Total Responses	6

Question 4: Do you have requests for shellfish you could not fulfill due to lack of supply?

Do you have requests for shellfish you could not fulfill due to lack of supply?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	37	34.9	34.9	34.9
	No	69	65.1	65.1	100.0
	Total	106	100.0	100.0	



Thirty-five percent of shellfish wholesalers said they had requests for shellfish they could not fulfill due to a lack of supply and 65% said they have not.

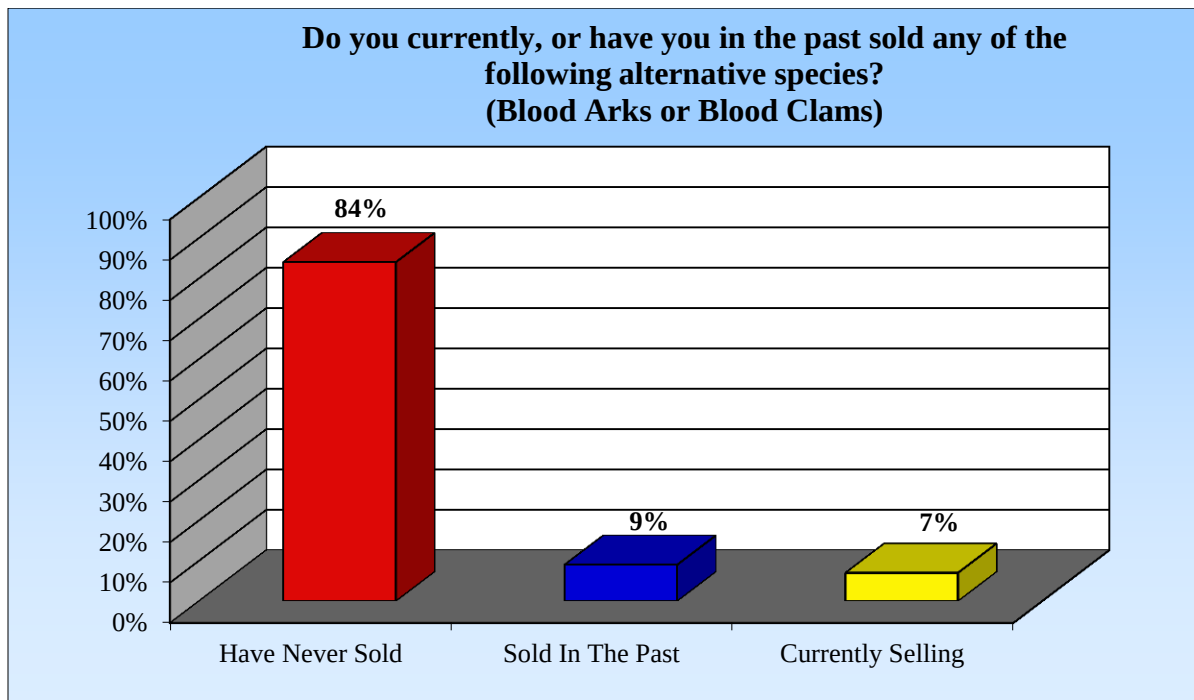
Question 5: What shellfish do you have the most difficulty supplying?

<u>Response</u>	<u>Frequency</u>
Razor Clams	(8)
Steamers	(6)
Oysters	(4)
Scallops	(4)
Quahogs	(3)
Soft Shell Clams	(2)
Hard Shell Clams	(2)
Mussels	(2)
Shrimp	(2)
Abalone	(1)
Barnacles	(1)
Blood Clams	(1)
Carcoals	(1)
Jackknife Clams	(1)
Limpets	(1)
Little Necks	(1)
Mahogany Clams	(1)
Seaweed	(1)
Stone Crab	(1)
Urchin	(1)
Whelk	(1)
Depends on the Season	(1)
All During Winter	(1)
All of Them	(1)
Total Responses	48

Question 6a: Do you currently, or have you in the past, sold any of the following alternative species?
(Blood Arks or Blood Clams)

**Do you currently, or have you in the past, sold any of the following alternative species?
(Blood Arks or Blood Clams)**

	Frequency	Percent	Valid Percent	Cumulative Percent
Have Never Sold	89	84.0	84.0	84.0
Sold in the Past	10	9.4	9.4	93.4
Currently Selling	7	6.6	6.6	100.0
Total	106	100.0	100.0	



Eighty-four percent of shellfish wholesalers said they have never sold Blood Arks or Blood Clams in the past, 9% said they have sold them in the past and 7% said they are currently selling Blood Arks or Blood Clams.

Question 6a: Why are you currently not selling Blood Arks or Blood Clams?

<u>Response</u>	<u>Frequency</u>
No Market	(4)
Availability	(3)
No Requests	(2)
No Demand	(2)
Available on Request	(1)
Bad Supply (Not Enough Demand)	(1)
Sporadic Supply (Low Demand)	(1)
Short Shelf Life	(1)
Smells Awful	(1)
Will Sell When Ready	(1)
Total Responses	17

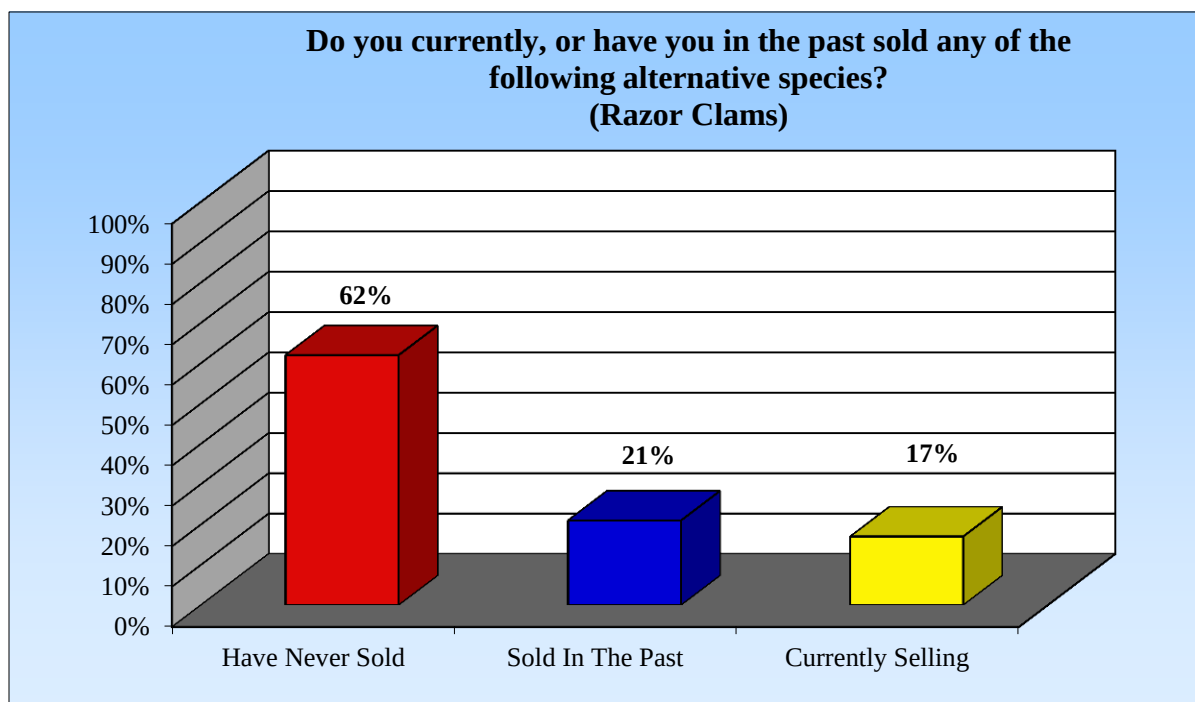
Question 6a: If you are currently selling Blood Arks or Blood Clams, what is the average price you paid this past season?

<u>Response</u>	<u>Frequency</u>
\$1.25/lb.	(1)
\$2.00/lb.	(1)
\$2.25/lb.	(1)
\$2.50/lb.	(1)
\$3.50/lb.	(1)
Total Responses	5

Question 6b: Do you currently, or have you in the past, sold any of the following alternative species?
(Razor Clams)

**Do you currently, or have you in the past, sold any of the following alternative species?
(Razor Clams)**

	Frequency	Percent	Valid Percent	Cumulative Percent
Have Never Sold	66	62.3	62.3	62.3
Sold in the Past	22	20.8	20.8	83.0
Currently Selling	18	17.0	17.0	100.0
Total	106	100.0	100.0	



Sixty-two percent of shellfish wholesalers said that they have never sold Razor Clams, 21% said they have sold them in the past and 17% said they are currently selling Razor Clams.

Question 6b: Why are you currently not selling Razor Clams?

<u>Response</u>	<u>Frequency</u>
Lack of Supply	(5)
No Demand	(4)
No Market	(3)
Too Expensive	(1)
Trying to Grow	(1)
Specialty Item	(1)
Bad Supply/Not Enough Demand	(1)
Digger Died	(1)
Available per Request	(1)
Total Responses	18

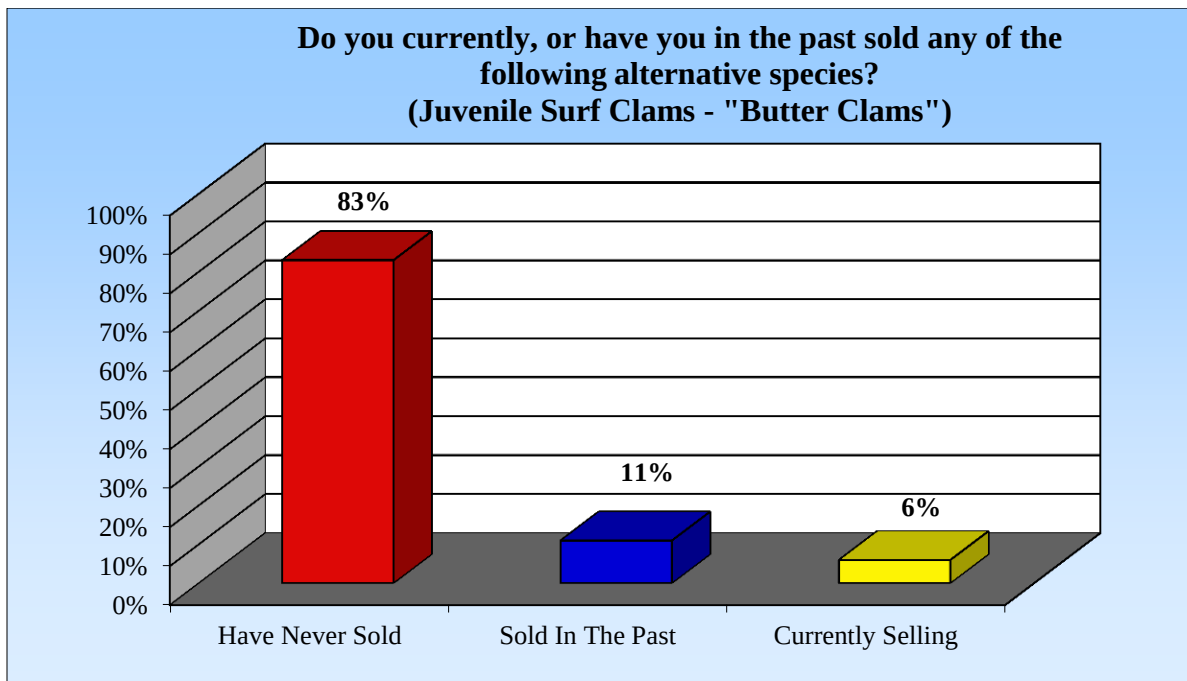
Question 6b: If you are currently selling Razor Clams, what is the average price you paid this past season?

<u>Response</u>	<u>Frequency</u>
\$5.00/lb.	(5)
\$6.00/lb.	(2)
\$1.50/lb.	(1)
\$3.00-8.00/lb.	(1)
\$4.00/lb.	(1)
\$4.25/lb.	(1)
\$5.50/lb.	(1)
\$7.00/lb.	(1)
Total Responses	13

Question 6c: Do you currently, or have you in the past, sold any of the following alternative species?
(Juvenile Surf Clams - "Butter Clams")

**Do you currently, or have you in the past, sold any of the following alternative species?
(Juvenile Surf Clams - "Butter Clams")**

	Frequency	Percent	Valid Percent	Cumulative Percent
Have Never Sold	88	83.0	83.0	83.0
Sold in the Past	12	11.3	11.3	94.3
Currently Selling	6	5.7	5.7	100.0
Total	106	100.0	100.0	



Eighty-three percent of shellfish wholesalers said they have never sold Juvenile Surf Clams (Butter Clams), 11% said they have sold them in the past and 6% said they are currently selling Juvenile Surf Clams (Butter Clams).

Question 6c: Why are you currently not selling Juvenile Surf Clams?

<u>Response</u>	<u>Frequency</u>
No Market	(3)
Illegal	(2)
Hard to Grow/Low Demand	(1)
Legal Minimum for Size	(1)
No Customer Request	(1)
Total Responses	8

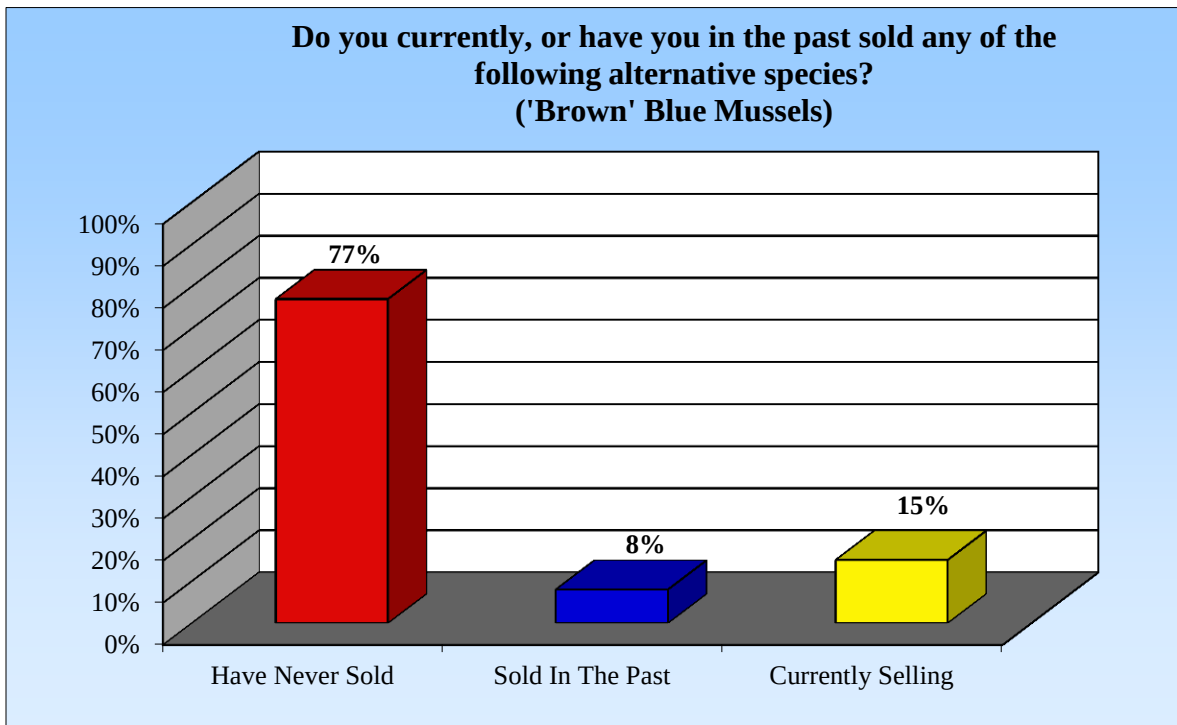
Question 6c: If you are currently selling Juvenile Surf Clams (Butter Clams), what is the average price you paid this past season?
--

<u>Response</u>	<u>Frequency</u>
\$0.50/piece	(2)
\$0.18/piece	(1)
Total Responses	3

Question 6d: Do you currently, or have you in the past, sold any of the following alternative species?
(‘Brown’ Blue Mussels)

**Do you currently, or have you in the past, sold any of the following alternative species?
(‘Brown’ Blue Mussels)**

	Frequency	Percent	Valid Percent	Cumulative Percent
Have Never Sold	82	77.4	77.4	77.4
Sold in the Past	8	7.5	7.5	84.9
Currently Selling	16	15.1	15.1	100.0
Total	106	100.0	100.0	



Seventy-seven percent of shellfish wholesalers said they have never sold ‘Brown’ Blue Mussels, 8% said they have sold them in the past and 15% said they are currently selling ‘Brown’ Blue Mussels.

Question 6d: Why are you currently not selling 'Brown' Blue Mussels?

<u>Response</u>	<u>Frequency</u>
No Market	(2)
Low Margin, Don't Ship Well	(1)
No Demand	(1)
Not Much Margin	(1)
Total Responses	5

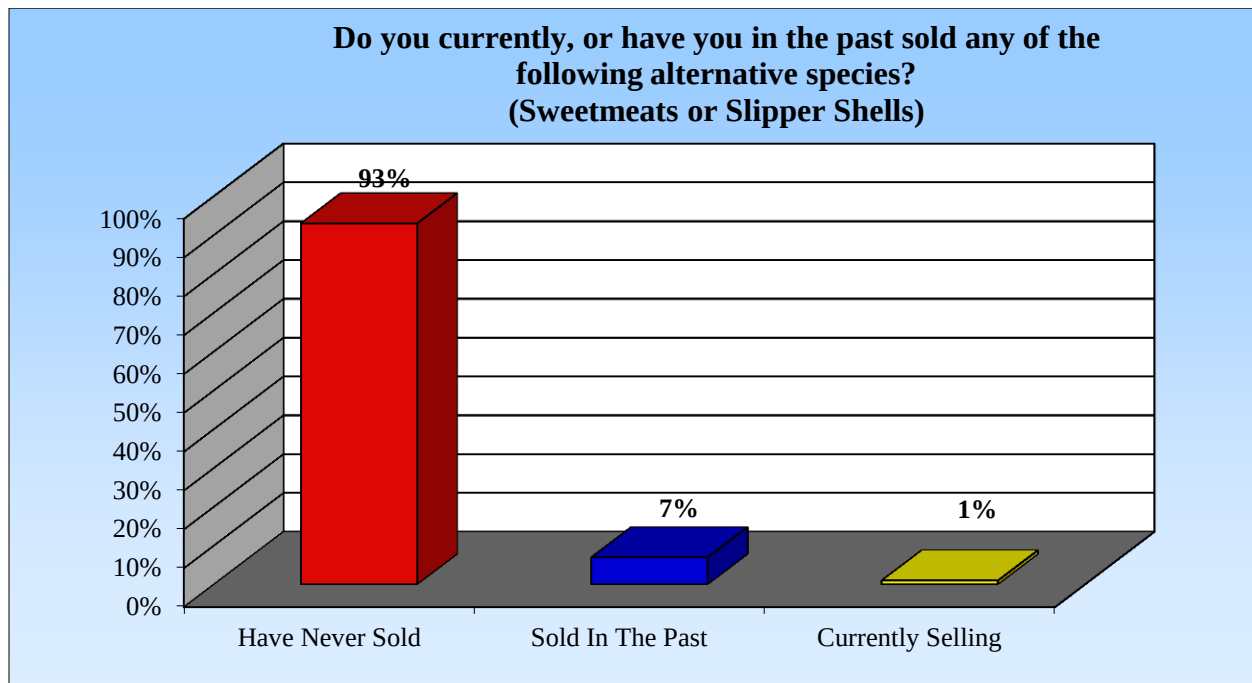
Question 6d: If you are currently selling 'Brown' Blue Mussels, what is the average price you paid this past season?

<u>Response</u>	<u>Frequency</u>
<\$0.05/piece	(1)
\$0.26/lb.	(1)
\$0.75/lb.	(1)
\$1.00/lb.	(1)
\$1.10/lb.	(1)
\$1.20/lb.	(1)
\$1.70/lb.	(1)
\$1.80/lb.	(1)
\$4.00/lb.	(1)
Total Responses	9

Question 6e: Do you currently, or have you in the past, sold any of the following alternative species?
(Sweetmeats or Slipper Shells)

**Do you currently, or have you in the past, sold any of the following alternative species?
(Sweetmeats or Slipper Shells)**

	Frequency	Percent	Valid Percent	Cumulative Percent
Have Never Sold	98	92.5	92.5	92.5
Sold in the Past	7	6.6	6.6	99.1
Currently Selling	1	.9	.9	100.0
Total	106	100.0	100.0	



Ninety-three percent of shellfish wholesalers said they have never sold Sweetmeats or Slipper Shells, 7% said they have sold them in the past and 1% said they are currently selling Sweetmeats or Slipper Shells.

Question 6e: Why are you currently not selling Sweetmeats or Slipper Shells?

<u>Response</u>	<u>Frequency</u>
No Demand	(2)
No Market	(2)
Ethnic Market	(1)
Hard to Ship	(1)
Have not Sold	(1)
On/Off Market	(1)
Too far away to fish (in Chile)	(1)
Would like to, can't find people	(1)
Total Responses	10

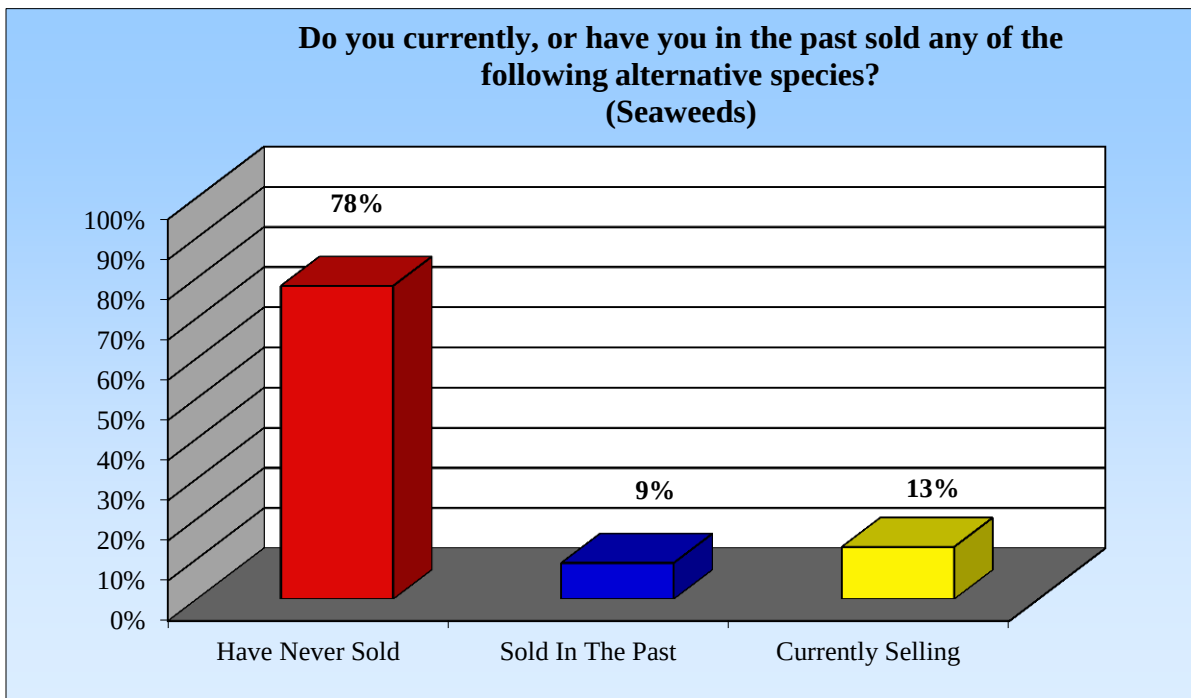
Question 6e: If you are currently selling Sweetmeats or Slipper Shells, what is the average price you paid this past season?

<u>Response</u>	<u>Frequency</u>
\$1.00/lb.	(1)

Question 6f: Do you currently, or have you in the past, sold any of the following alternative species?
(Seaweeds)

Do you currently, or have you in the past, sold any of the following alternative species? (Seaweeds)

	Frequency	Percent	Valid Percent	Cumulative Percent
Have Never Sold	83	78.3	78.3	78.3
Sold in the Past	9	8.5	8.5	86.8
Currently Selling	14	13.2	13.2	100.0
Total	106	100.0	100.0	



Seventy-eight percent of shellfish wholesalers said they have never sold Seaweeds, 9% said they have sold them in the past and 13% said they are currently selling Seaweeds.

Question 6f: Why are you currently not selling Seaweeds?

<u>Response</u>	<u>Frequency</u>
No Market	(2)
Haven't Sold	(1)
No Supply	(1)
Regulated	(1)
Total Responses	5

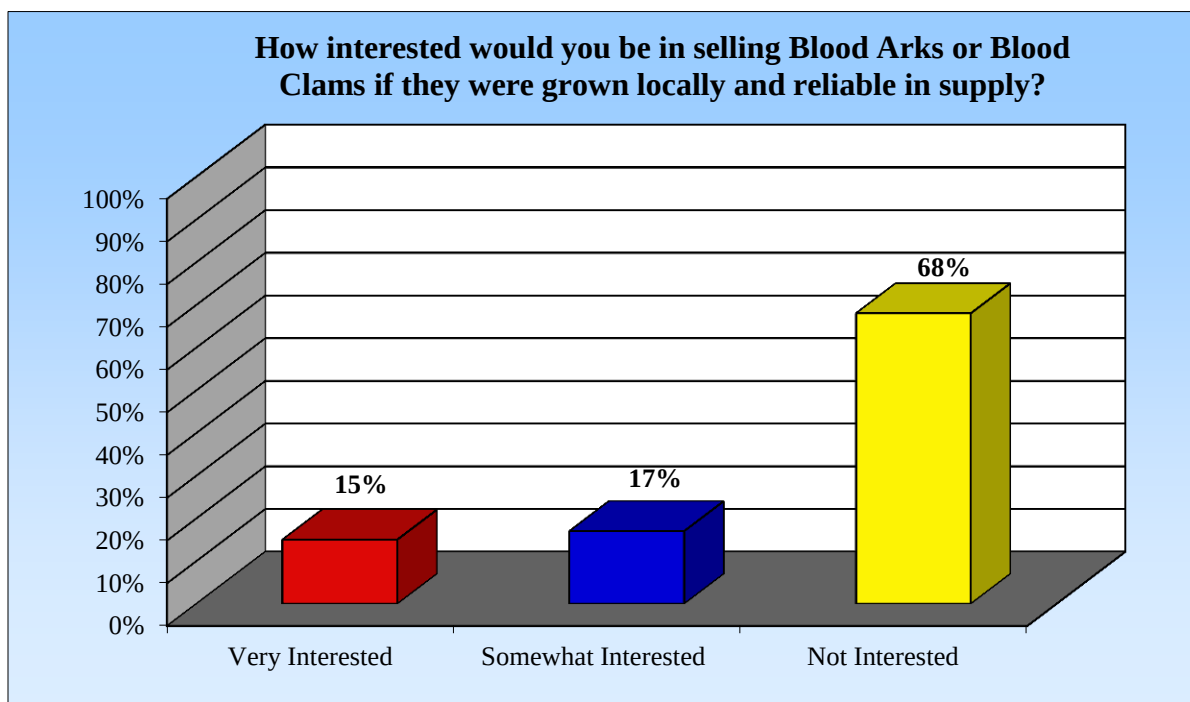
Question 6f: If you are currently selling Seaweeds, what is the average price you paid this past season?

<u>Response</u>	<u>Frequency</u>
\$1.00/lb.	(2)
\$2.00/lb.	(1)
\$2.00/lb.	(1)
\$3.00/lb.	(1)
\$4.00/lb.	(1)
\$5.00 - \$15.00/lb.	(1)
\$9.00/qt.	(1)
\$20.00/lb.	(1)
Total Responses	9

Question 7a: How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(Blood Arks or Blood Clams)

How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(Blood Arks or Blood Clams)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	16	15.1	15.1	15.1
Somewhat Interested	18	17.0	17.0	32.1
Not Interested	72	67.9	67.9	100.0
Total	106	100.0	100.0	

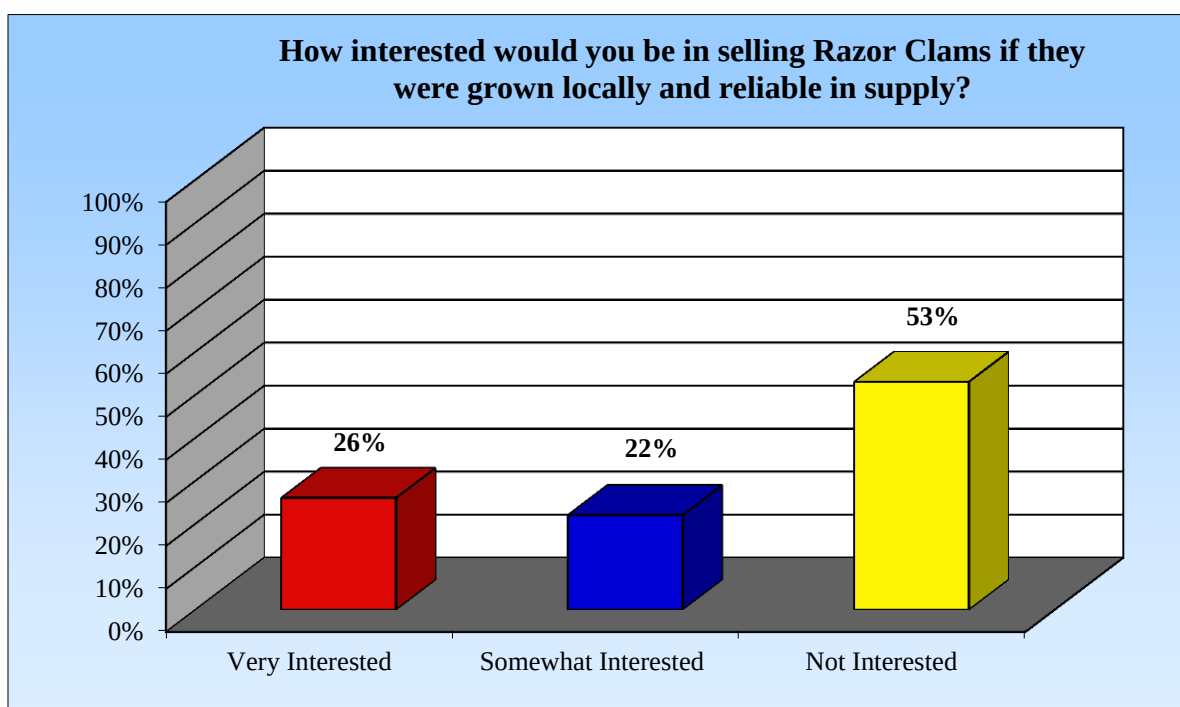


Fifteen percent of shellfish wholesalers said they would be interested in selling Blood Arks or Blood Clams if they were grown locally and reliable in supply, 17% said they are somewhat interested and 68% said they are not interested.

Question 7b: How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(Razor Clams)

How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(Razor Clams)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	27	25.5	25.5	25.5
Somewhat Interested	23	21.7	21.7	47.2
Not Interested	56	52.8	52.8	100.0
Total	106	100.0	100.0	

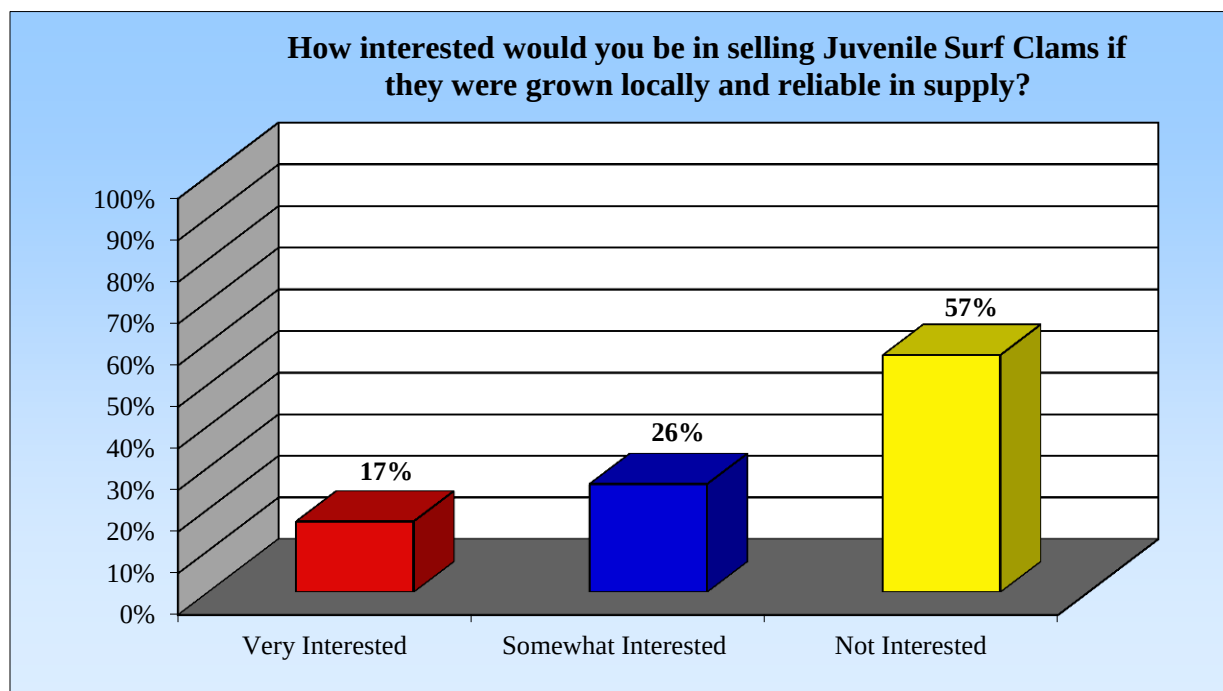


Twenty-six percent of shellfish wholesalers said they would be interested in selling Razor Clams if they were grown locally and reliable in supply, 22% said they are somewhat interested and 53% said they are not interested.

Question 7c: How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(Juvenile Surf Clams)

How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(Juvenile Surf Clams)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	18	17.0	17.0	17.0
Somewhat Interested	28	26.4	26.4	43.4
Not Interested	60	56.6	56.6	100.0
Total	106	100.0	100.0	

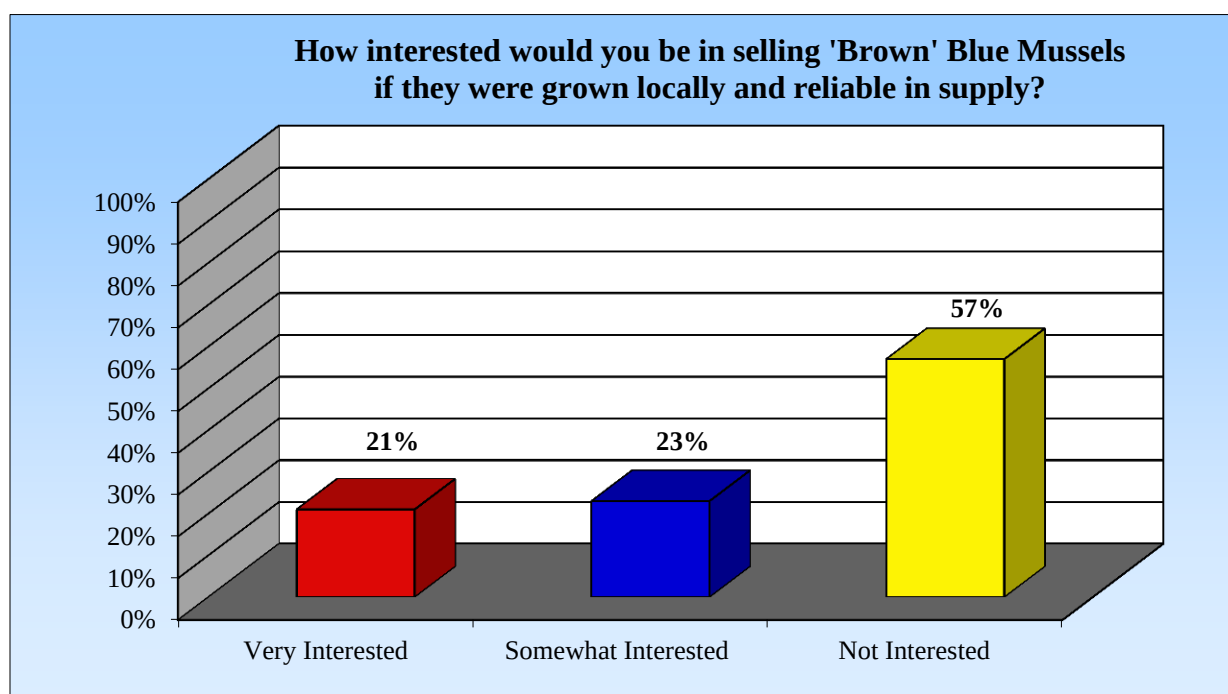


Seventeen percent of shellfish wholesalers said they would be interested in selling Juvenile Surf Clams if they were grown locally and reliable in supply, 26% said they are somewhat interested and 57% said they are not interested.

Question 7d: How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(‘Brown’ Blue Mussels)

How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(‘Brown’ Blue Mussels)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	22	20.8	20.8	20.8
Somewhat Interested	24	22.6	22.6	43.4
Not Interested	60	56.6	56.6	100.0
Total	106	100.0	100.0	

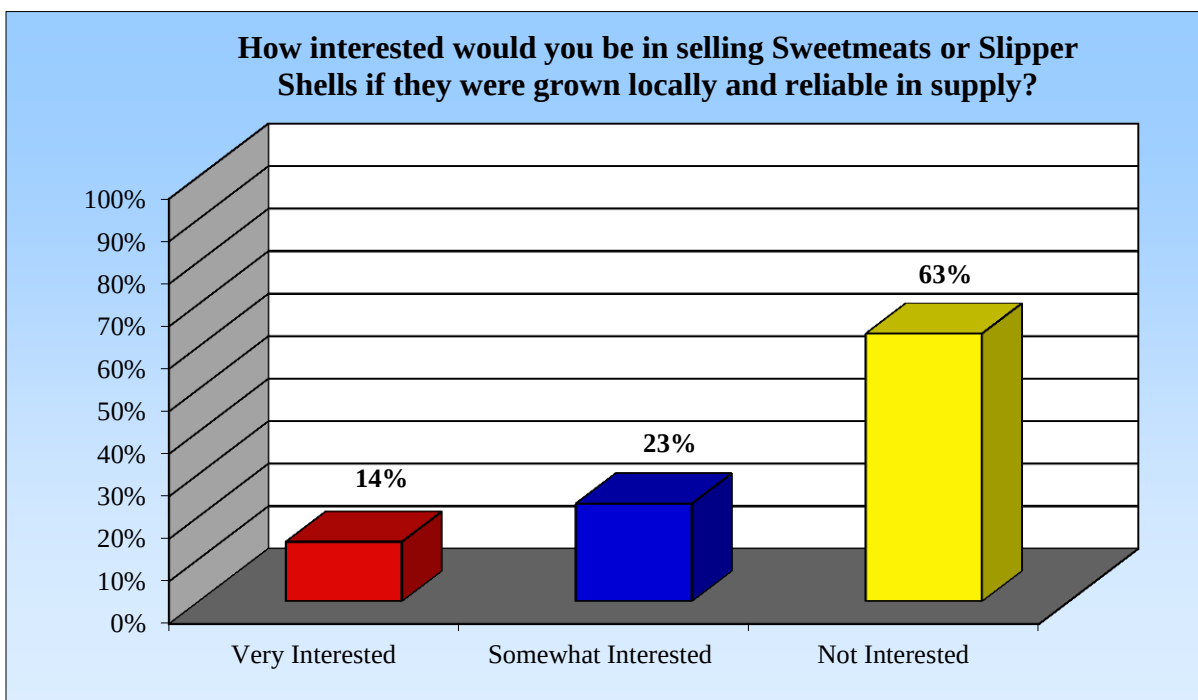


Twenty-one percent of shellfish wholesalers said they would be interested in selling ‘Brown’ Blue Mussels if they were grown locally and reliable in supply, 23% said they are somewhat interested and 57% said they are not interested.

Question 7e: How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(Sweetmeats or Slipper Shells)

How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(Sweetmeats or Slipper Shells)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	15	14.2	14.2	14.2
Somewhat Interested	24	22.6	22.6	36.8
Not Interested	67	63.2	63.2	100.0
Total	106	100.0	100.0	

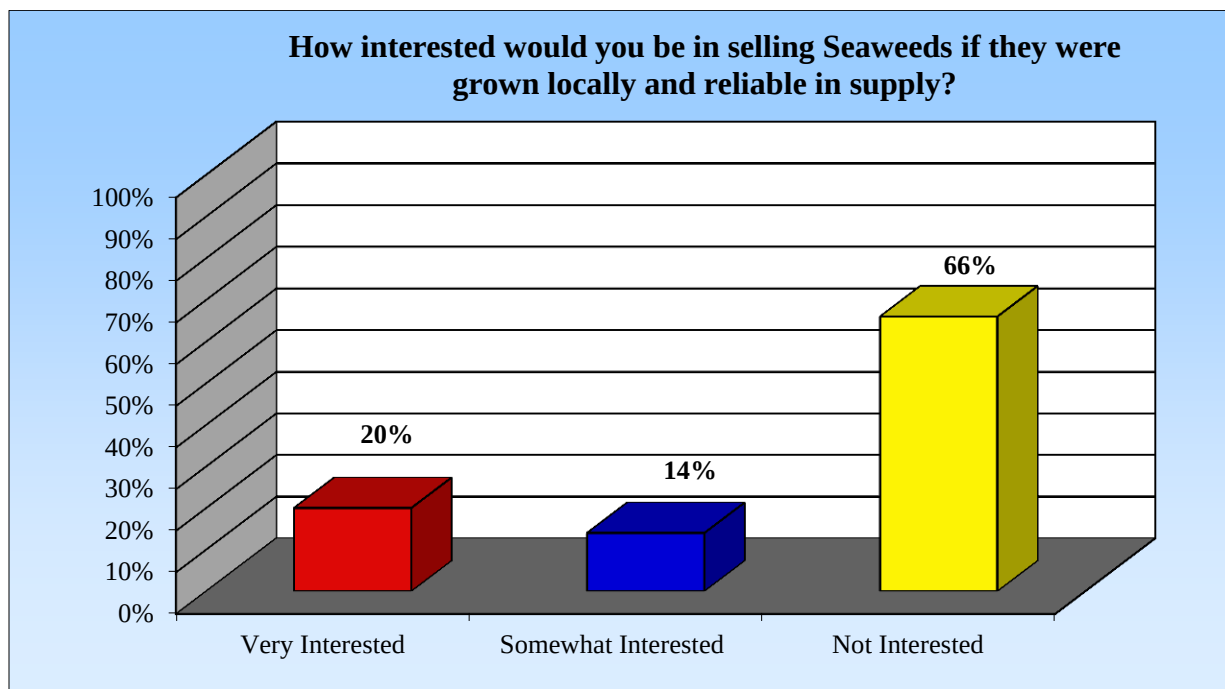


Fourteen percent of shellfish wholesalers said they would be interested in selling Sweetmeats or Slipper Shells if they were grown locally and reliable in supply, 23% said they are somewhat interested and 63% said they are not interested.

Question 7f: How interested would you be in selling these alternative species if they were grown locally and reliable in supply?
(Seaweeds)

How interested do you think your customers would be in purchasing these alternative species if they were available?
(Seaweeds)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	21	19.8	19.8	19.8
Somewhat Interested	15	14.2	14.2	34.0
Not Interested	70	66.0	66.0	100.0
Total	106	100.0	100.0	

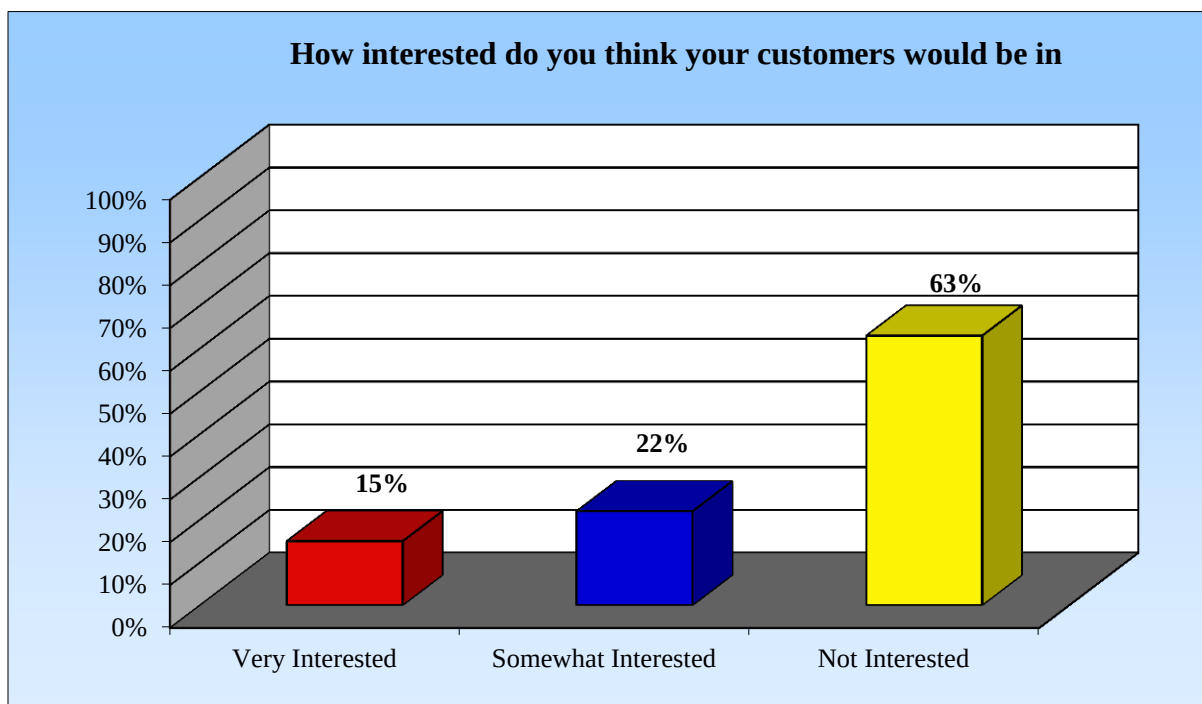


Twenty percent of shellfish wholesalers said they would be interested in selling Seaweeds if they were grown locally and reliable in supply, 14% said they are somewhat interested and 66% said they are not interested.

Question 8a: How interested do you think your customers would be in purchasing these alternative species if they were available?
(Blood Arks or Blood Clams)

How interested do you think your customers would be in purchasing these alternative species if they were available?
(Blood Arks or Blood Clams)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	16	15.1	15.1	15.1
Somewhat Interested	23	21.7	21.7	36.8
Not Interested	67	63.2	63.2	100.0
Total	106	100.0	100.0	

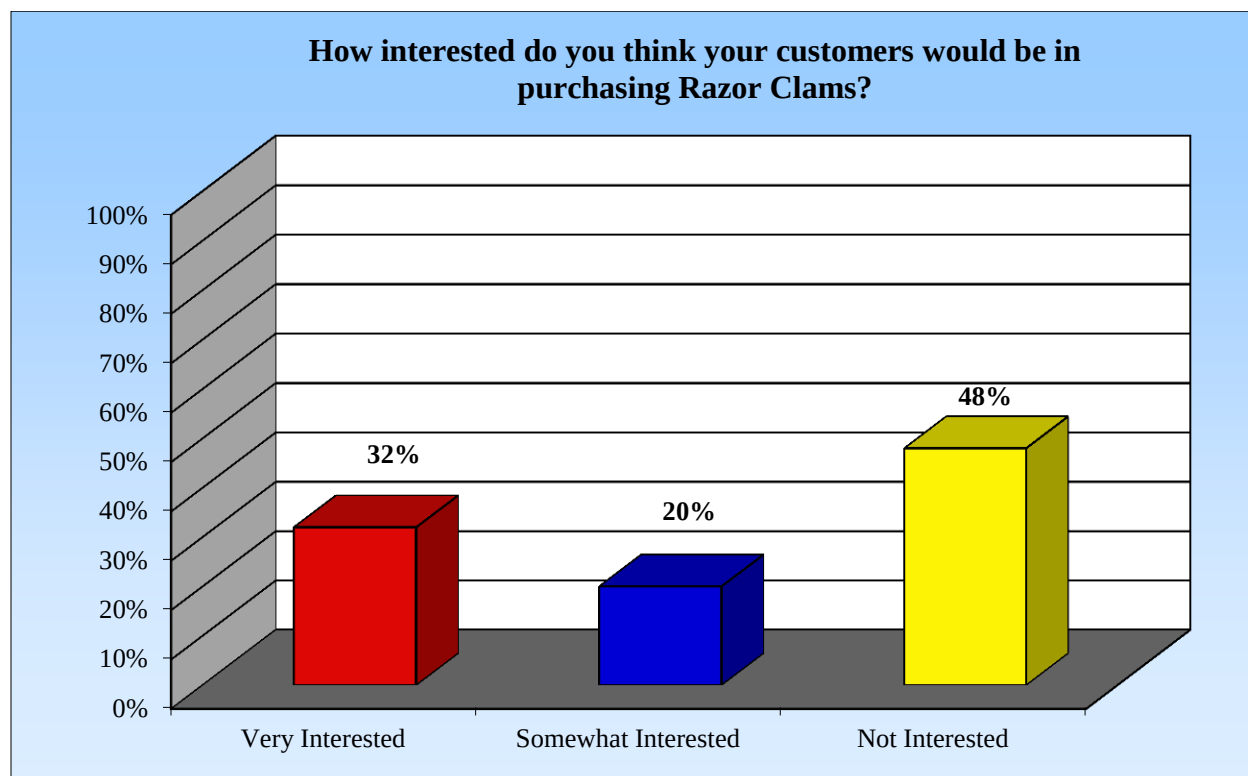


Fifteen percent of shellfish wholesalers think their customers would be very interested in purchasing Blood Arks or Blood Clams, 22% think they would be somewhat interested and 63% think they would not be interested.

Question 8b: How interested do you think your customers would be in purchasing these alternative species if they were available?
(Razor Clams)

How interested do you think your customers would be in purchasing these alternative species if they were available?
(Razor Clams)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	34	32.1	32.1	32.1
Somewhat Interested	21	19.8	19.8	51.9
Not Interested	51	48.1	48.1	100.0
Total	106	100.0	100.0	

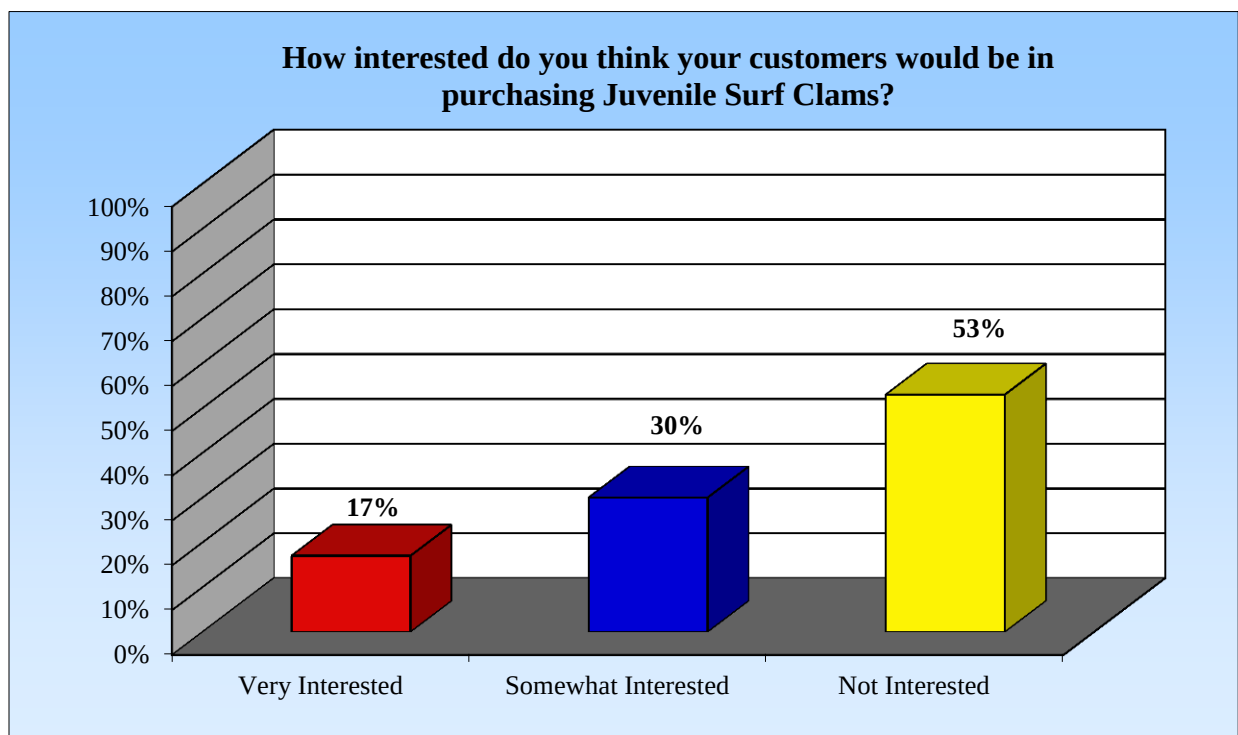


Thirty-two percent of shellfish wholesalers think their customers would be very interested in purchasing Razor Clams, 20% think they would be somewhat interested and 48% think they would not be interested.

Question 8c: How interested do you think your customers would be in purchasing these alternative species if they were available?
(Juvenile Surf Clams)

How interested do you think your customers would be in purchasing these alternative species if they were available?
(Juvenile Surf Clams)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	18	17.0	17.0	17.0
Somewhat Interested	32	30.2	30.2	47.2
Not Interested	56	52.8	52.8	100.0
Total	106	100.0	100.0	

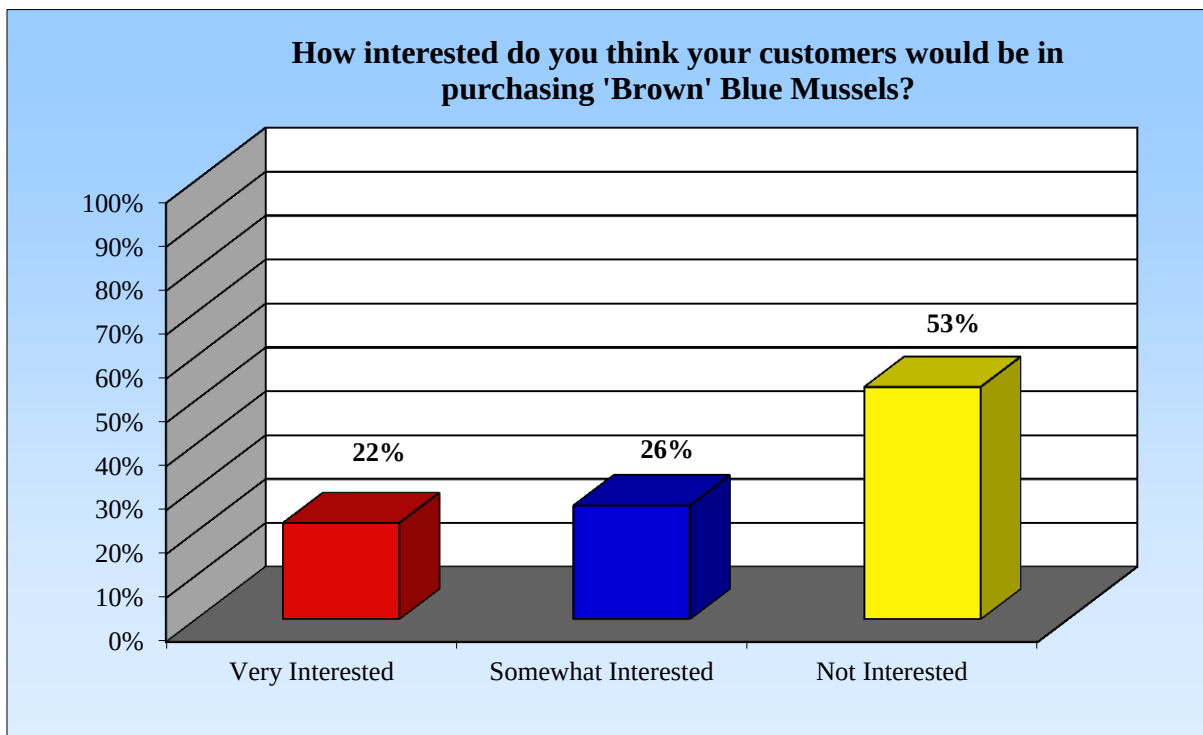


Seventeen percent of shellfish wholesalers think their customers would be very interested in purchasing Juvenile Surf Clams, 30% think they would be somewhat interested and 53% think they would not be interested.

Question 8d: How interested do you think your customers would be in purchasing these alternative species if they were available?
(‘Brown’ Blue Mussels)

How interested do you think your customers would be in purchasing these alternative species if they were available?
(‘Brown’ Blue Mussels)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	23	21.7	21.7	21.7
Somewhat Interested	27	25.5	25.5	47.2
Not Interested	56	52.8	52.8	100.0
Total	106	100.0	100.0	

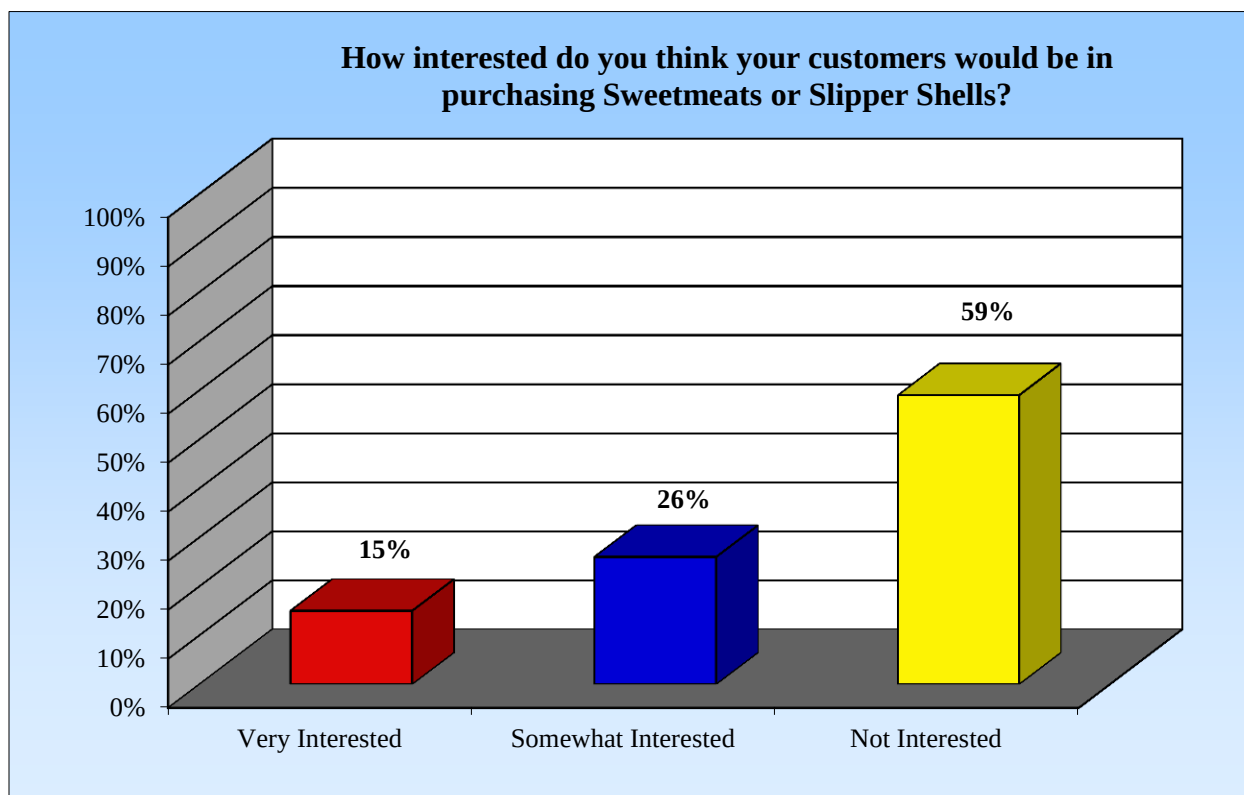


Twenty-two percent of shellfish wholesalers think their customers would be very interested in purchasing ‘Brown’ Blue Mussels, 26% think they would be somewhat interested and 53% think they would not be interested.

Question 8e: How interested do you think your customers would be in purchasing these alternative species if they were available?
(Sweetmeats or Slipper Shells)

How interested do you think your customers would be in purchasing these alternative species if they were available?
(Sweetmeats or Slipper Shells)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	16	15.1	15.1	15.1
Somewhat Interested	28	26.4	26.4	41.5
Not Interested	62	58.5	58.5	100.0
Total	106	100.0	100.0	

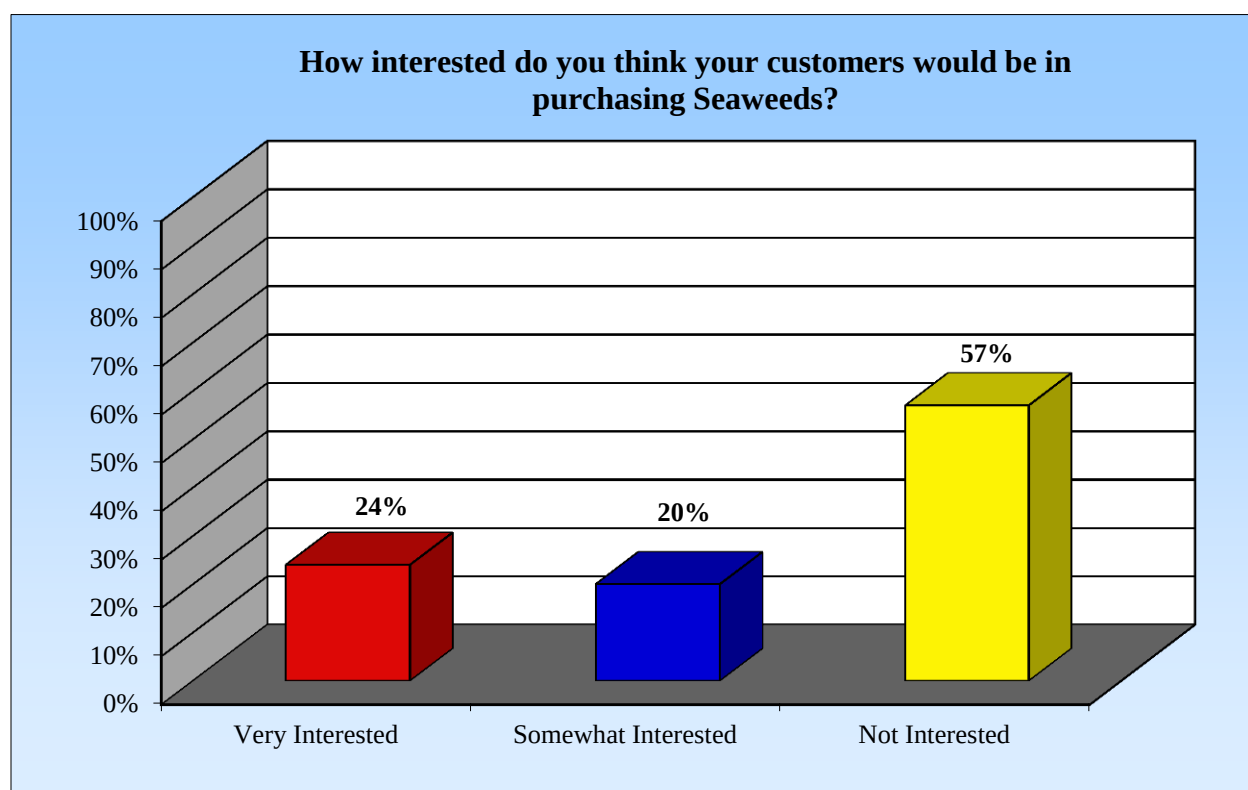


Fifteen percent of shellfish wholesalers think their customers would be very interested in purchasing Sweetmeats or Slipper Shells, 26% think they would be somewhat interested and 59% think they would not be interested.

Question 8f: How interested do you think your customers would be in purchasing these alternative species if they were available?
(Seaweeds)

How interested do you think your customers would be in purchasing these alternative species if they were available?
(Seaweeds)

	Frequency	Percent	Valid Percent	Cumulative Percent
Very Interested	25	23.6	23.6	23.6
Somewhat Interested	21	19.8	19.8	43.4
Not Interested	60	56.6	56.6	100.0
Total	106	100.0	100.0	

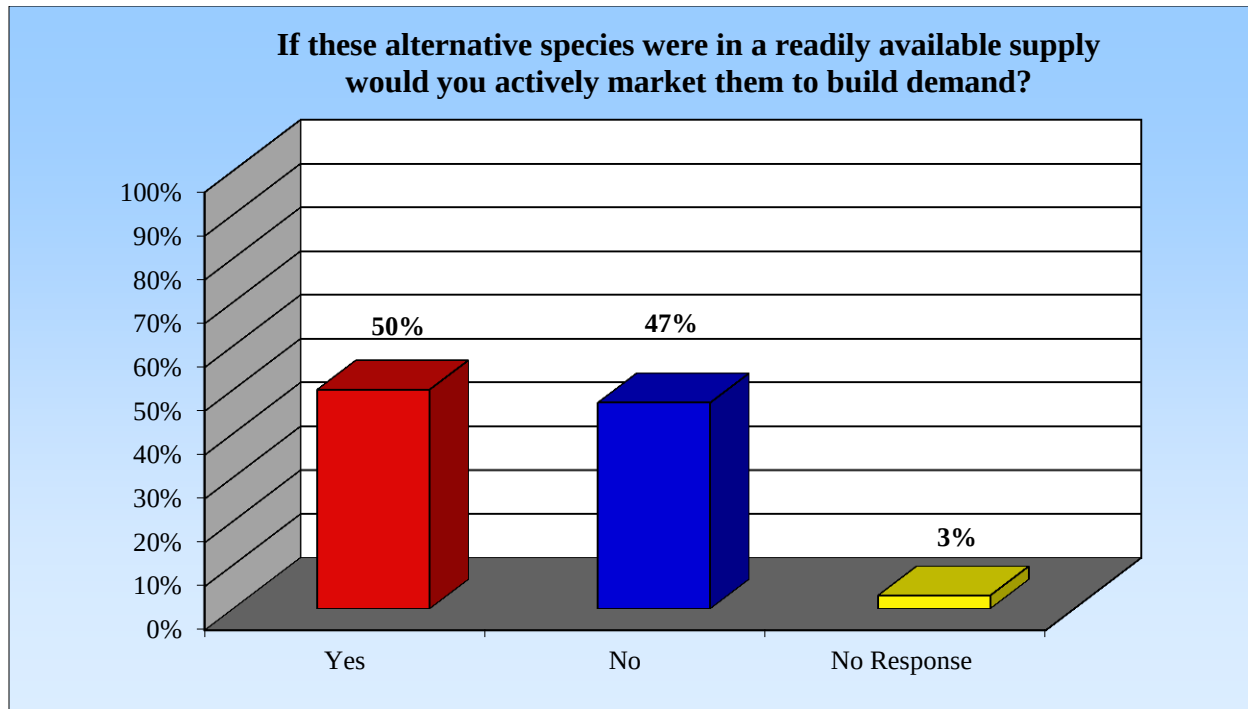


Twenty-four percent of shellfish wholesalers think their customers would be very interested in purchasing Seaweeds, 20% think they would be somewhat interested and 57% think they would not be interested.

Question 9: If these alternative species were in a readily available supply would you actively market them to build demand?

If these alternative species were in a readily available supply would you actively market them to build demand?

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	53	50.0	50.0	50.0
No	50	47.2	47.2	97.2
No Response	3	2.8	2.8	100.0
Total	106	100.0	100.0	



Fifty percent of shellfish wholesalers said that if these alternative species were in a readily available supply they would actively market them to build demand, 47% said they would not and 3% had no response.

Question 10: If you have sold any of these alternative species in the past, was it a specialty or ethnic market? If so, please describe the market.

<u>Response</u>	<u>Frequency</u>
No Special Market	(7)
Asian Market	(6)
Blood Arks, ethnic market. Razor, All markets	(1)
Both, local market for New Bedford	(1)
Chinese Market	(1)
Chinese New Year large oysters	(1)
Curious Public	(1)
Ethnic Market	(1)
Ethnic, Chinese, started four years ago in New York	(1)
Ethnic, Consistent availability market	(1)
High-end restaurants and Asian Market	(1)
Japanese and Chilean markets, high end country clubs	(1)
Korean, Asian Market	(1)
Market dies, because business they bought from went out of business	(1)
Pet food	(1)
Razor Clams are a Christmas type thing	(1)
Razor Clams at white tablecloth places. As well as Asian markets	(1)
Razor Clams, Asian market. Live surf clams more ethnic but have to be processed	(1)
Seaweed to Asian market	(1)
Sold Razor Clams to the Asian Market	(1)
Sold to Whole Foods	(1)
Tried to sell Blood Arks to West Coast (they did not like them)	(1)
Used in retail, pre-packaged and raw meals, no specific market	(1)
Vietnamese, Spanish	(1)
We sell into both mainstream and ethnic markets	(1)
Total Responses	36

Question 11a: If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?

If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?

(More Market Information)

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	34	32.1	32.1	32.1
Valid No	72	67.9	67.9	100.0
Total	106	100.0	100.0	

If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?

(More Reliable Supply)

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	42	39.6	39.6	39.6
Valid No	64	60.4	60.4	100.0
Total	106	100.0	100.0	

If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?

(Better Price Margin)

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	27	25.5	25.5	25.5
Valid No	79	74.5	74.5	100.0
Total	106	100.0	100.0	

If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?

(Increased Customer Demand)

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	50	47.2	47.2	47.2
Valid No	56	52.8	52.8	100.0
Total	106	100.0	100.0	

Question 11a: If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?
(Continued)

**If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?
(No Interest in Selling these Species)**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	45	42.5	42.5	42.5
Valid No	61	57.5	57.5	100.0
Total	106	100.0	100.0	

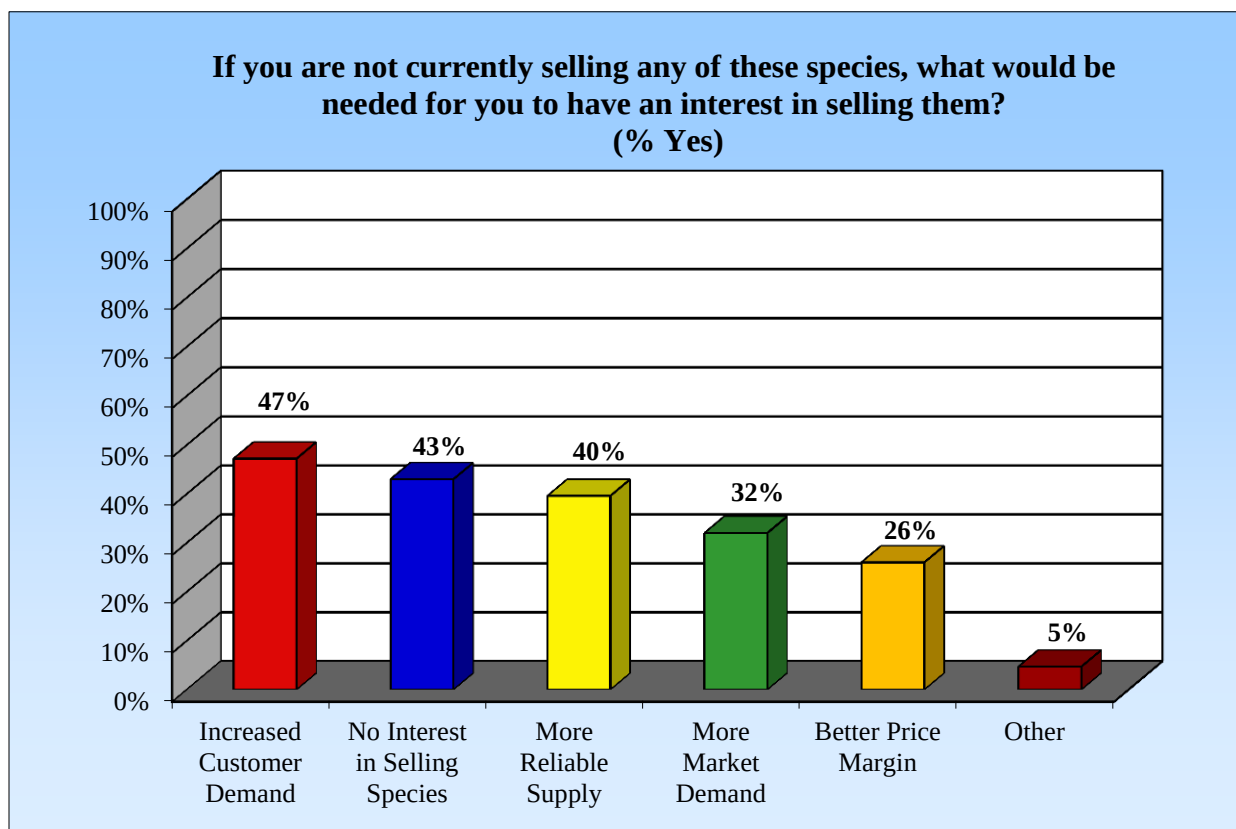
**If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?
(Other)**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	5	4.7	4.7	4.7
Valid No	101	95.3	95.3	100.0
Total	106	100.0	100.0	

Other Responses

- “Land to farm them in“
- “Must comply with Whole Foods Standards”
- “Not interested in selling anything besides oysters”
- “State should help market these alternative species”
- “Target Asian market for these species”
- “Very slow at Edgartown, no shelf life, last less than 72 hours

Question 11a: If you are not currently selling any of these species, what would be needed for you to have an interest in selling them?
(Continued)



Forty-seven percent of shellfish wholesalers said they would need more customer demand to have interest in selling alternative species, 43% said they have no interest in selling these species, 40% said they need a more reliable supply, 32% said they need more market demand, 26% said they need better price margin and 5% said they would need something else.

Question 12: Is there anything you could suggest to help SEMAC build a demand for these species?

- “Alert the public of the dangers of FMOS, antibiotics in meats, animal feed dangers etc. vs. seafood benefits.”
- “Available recipes, tips for handling (store, shelf life, ship information). Going to talk directly to chef, show them how to use the species in a food dish.”
- “Avoid oysters, not that profitable. Periwinkle is the next big seafood is his prediction.”
- “Better advertising.”
- “Build Customer Demand.”
- “Check if the juvenile surf clam is illegal.”
- “Disease from shellfish can harm us. Too much processing involved.”
- “Do what the Maine Fisheries Department is doing because they are on top of their game.”
- “Educating people in sustainable shellfish and how to properly cook them.”
- “Education on these species and advice on how to cook them.”
- “Encourage initiative to farm locally.”
- “Find a market or steady demand.”
- “Find the demand.”
- “Get the species to restaurants for people to try them. People will try them this way rather than on their own.”
- “Get the word out about these shellfish.”
- “Grants to growers.”
- “Grow Blood Clams and Razor Clams because there is a demand.”
- “Have a more reliable seed source.”
- “Information about them all.”
- “Market material and getting information to the customers.”

Question 12: Is there anything you could suggest to help SEMAC build a demand for these species?
(Continued)

- “Market the alternative species.”
- “Most species are wild catch species, ex. Duxbury has lots of Razor Clams, demonstrate to wild catch fisherman that there's enough volume of species so they can make money.”
- “Need to promote these species to the general public like other underutilized species.”
- “New generation not interested in the species listed.”
- “Offer samples or a way for wholesalers and consumers to try these species.”
- “Packaging to increase shelf life. How to cook them properly.”
- “Product knowledge, need to know more and find demand.”
- “Promote the alternative species.”
- “Razor Clams are hot right now. Blood Clams, small demand but rising. Juvenile, belly is poisonous, market restriction for the small clam market. Mussels, short shelf life, more frozen, and difficult margins.”
- “Real life information on how to cook, farm, make sustainable.”
- “Show the species in Chronical, major magazine may spark interest.”
- “Startup money into a marketing campaign. In the 1970s SEAGRANT provided money to market mussels.
- “Stick with what you are good at selling.”
- “Supply issue.”
- “To find the demand.”
- “Utilization of products.”

Question 12: Is there anything you could suggest to help SEMAC build a demand for these species?
(Continued)

- “You have to envision how high end chefs are going to be able to put these things into a dish. I think they’re all really cool and whenever we get stuff like this in, we move it to a few super creative chefs. Razor Clams have done well because they can be the main protein in an appetizer. Limpets/Slipper shells though are a good example of a species where no one is ever going to sell enough of them at a high enough margin to make it worthwhile. Blood Arks are cool, but they push the envelope. If we could convince people they won’t give you Hepatitis C we’d be in a much better position to sell them. Anyhow, only after the notable chefs start using them, then there’s a trickledown effect and that’s how the market develops.”

Wholesalers interested in selling Blood Arks or Blood Clams
--

- Castle Hill Lobster Co., Inc.
- Coonamessett Farm, Inc.
- Cotuit Oyster Company, Inc.
- Edgartown Seafood Market
- Federal Shell + Fish, LLC
- Georges Bank, LLC
- Ipswich Shellfish Fish Market
- John Nagle, Co.
- Menemsha Fish House
- Nantucket Seafoods
- Rocky Neck Fish, Co.
- Salty Balls Seafood, LLC
- Seaway Company
- Taylor Cultured Seafood
- The Big Rock Oyster Company
- Wellfleet Shellfish, Co.

Wholesalers interested in selling Razor Clams
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- Captain Marden's Seafoods
- Castle Hill Lobster Co., Inc.
- Chatham Shellfish Company
- Constitution Seafoods, Inc.
- Coonamessett Farm, Inc.
- David's Fish Market, Inc.
- Edgartown Seafood Market
- Federal Shell + Fish, LLC
- Georges Bank, LLC
- Green Pond Fish Market
- Ipswich Shellfish Fish Market
- John Nagle, Co.
- M.F. Foley Company, Inc.
- Menemsha Fish House
- Mullaney's Harborside Fish Market
- Nantucket Seafoods
- Pangea Shellfish & Seafood Company, Inc.
- Patriot Seafoods
- Plymouth Rock Oyster Growers
- Rocky Neck Fish Co.
- Salty Balls Seafood, LLC
- Seaway Company
- Swansea Shellfish, Inc.
- Taylor Cultured Seafood
- The Big Rock Oyster Company
- Wellfleet Shellfish, Co.
- Wildfish, LLC

Wholesalers interested in selling Juvenile Surf Clams
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- Atlantic Capes Fisheries, Inc.
- Captain Marden's Seafoods
- Castle Hill Lobster Co., Inc.
- Channel Fish Co., Inc.
- Coonamesett Farm, Inc.
- Edgartown Seafood Market
- Federal Shell + Fish, LLC
- Georges Bank, LLC
- John Nagle Co.
- Menemsha Fish House
- North Coast Seafoods, Inc.
- Rocky Neck Fish Co.
- Salty Balls Seafood, LLC
- Seaway Company
- Taylor Cultured Seafood
- The Big Rock Oyster Company
- Wellfleet Shellfish Co.
- Wildfish, LLC

Wholesalers interested in selling ‘Brown’ Blue Mussels

- Brant Rock Fish Market
- Castle Hill Lobster Co., Inc.
- Coonamessett Farm, Inc.
- Edgartown Seafood Market
- Federal Shell + Fish, LLC
- Georges Bank, LLC
- Grass Ground Corp /Cataumet Fish
- Ipswich Shellfish Fish Market
- John Nagle Co.
- M.F. Foley Company, Inc.
- Menemsha Fish House
- Northern Wind, Inc.
- Pangea Shellfish & Seafood Company, Inc.
- Pocomo Meadow Oysters
- Rocky Neck Fish Co.
- Salty Balls Seafood, LLC
- Seaway Company
- Taylor Cultured Seafood
- The Big Rock Oyster Company
- The Gloucester House
- Wellfleet Shellfish Co.
- Whole Foods Market

Wholesalers interested in selling Sweetmeats or Slipper Shells

- Coonamessett Farm, Inc.
- Cotuit Oyster Company, Inc.
- Edgartown Seafood Market
- Federal Shell + Fish, LLC
- Georges Bank, LLC
- John Nagle Co.
- Menemsha Fish House
- Nantucket Seafoods
- Plymouth Rock Oyster Growers
- Salty Balls Seafood, LLC
- Seaway Company
- Taylor Cultured Seafood
- The Big Rock Oyster Company
- Wellfleet Shellfish Co.
- Whole Foods Market

Wholesalers interested in selling Seaweeds

- All Island Seafood, Inc.
- Captain Marden's Seafoods
- Chatham Fish and Lobster Company
- Constitution Seafoods, Inc.
- Coonamessett Farm, Inc.
- David's Fish Market, Inc.
- Edgartown Seafood Market
- Federal Shell + Fish, LLC
- Georges Bank, LLC
- John Nagle Co.
- Menemsha Fish House
- Mullaney's Harborside Fish Market
- Nantucket Seafoods
- Patriot Seafoods
- Salty Balls Seafood, LLC
- Seaway Company
- Taylor Cultured Seafood
- The Big Rock Oyster Company
- Turk's Seafood
- Wellfleet Shellfish Co.
- Wildfish LLC