Retail Overview Q1 2012

R Watson
r_watson@seafish.co.uk

supporting the seafood industry for a sustainable, profitable future

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Executive Summary

- Economic Context
  - Consumer Price Inflation (CPI) fell to 3.5% but Annual Rate of Earnings growth for the period at 1.1 %, and rising fuel prices, meant that households were still feeling the squeeze.

- UK Shopper
  - A further erosion of shopper confidence meant that value, price and promotional activity feature highly in product and store choice decision.

- Retail Overview
  - Little movement in the share of overall value of fish sales by retailer. ASDA are overhauling their fish counters, Tesco are revamping their stores, Morrisons have joined the dash to open convenience stores.

- Total Seafood
  - Up 4.9% in value , down 1.8 % in volume.
  - Reflects the effect of inflationary price rises, retailer promotions, shoppers buying less per trip and some shoppers leaving the category altogether.
  - Food & non-alcoholic beverages rose by 4.6 per cent over the year to March 2012.
  - Market Share flat for the period.
    - Frozen: Value 26% Vol. 36% Chilled: Value 57% Vol. 40% Ambient : Value 17% Vol. 24%

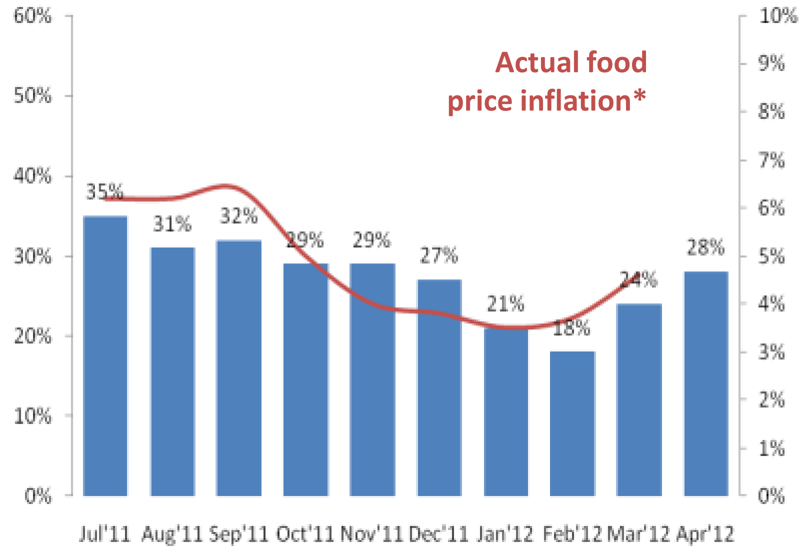
Economic Context

Source: Nielsen Scan Track till roll data

Economic Context

- Consumer Price Inflation (CPI) fell to 3.5% in March 2012, down from a high of 5.2% in Sept 2011.
- But Annual Rate of Earnings growth for the period at 1.1 % meant that households were still feeling the squeeze.
- Food inflation increased to 4.6% in March and grocery shopping confidence dipped slightly – **shoppers are bracing themselves for a drop in living standards** and more **expect to be worse off** in the year ahead compared to the start of the year.

Shoppers expecting **food prices to be 'much' more expensive** in the next 12 months



Source: *ONS / IGD

UK Shopper

Source: Nielsen Scan Track till roll data

UK Shopper – Q1 2012

March 2012

Effects of the 2012 Budget announcements

February 2012

Petrol prices begin to rise again significantly in February

Beginning of Fairtrade Fortnight

January 2012

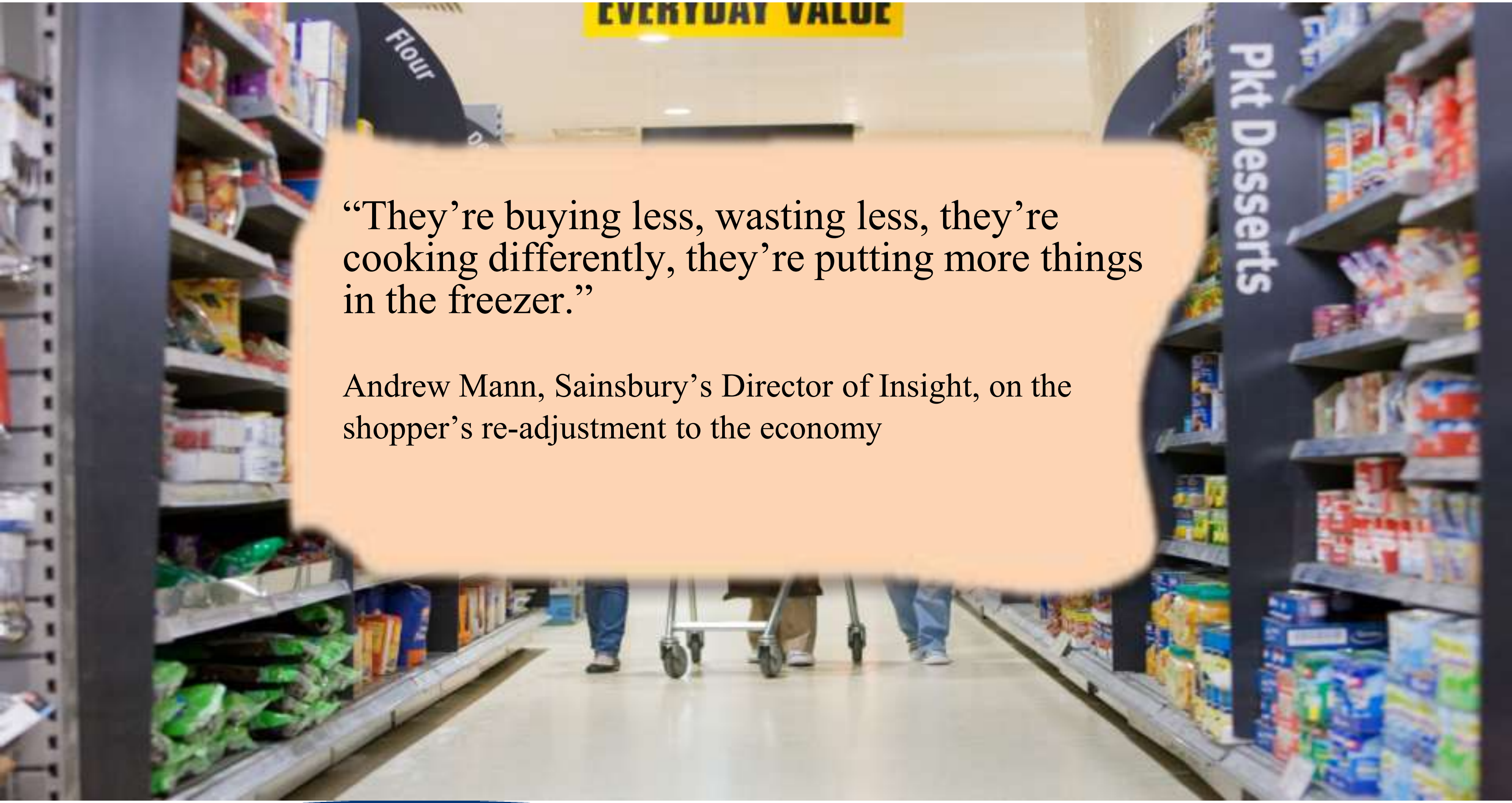
- **Consumer Price Inflation fell to a 14-month low of 3.6% in January**
- **Mildest January since 2008**

The upbeat mood witnessed at the start of the year didn't herald a road to recovery, as shopper pessimism returned in March. The effects of new austerity measures announced in the 2012 budget and the increasing pressure of rising fuel prices continued to squeeze shopper confidence during the month:

- **24% of shoppers said they expected food prices to be much more expensive in the year ahead, a rise from 18% in February**
- **Those expecting 'saving money' to become more important over the coming year rose to 42%, the highest level to date. Shoppers are predicting further austerity to come**
- **Value and price feature highly in store choice decision – Nearly half (48%) say price is an extremely important factor when choosing where to shop, an increase from four in ten (40%) in Mar'11. With price becoming more important, shoppers are also predicting they will use discounters more in the next year (27% vs 22% in Feb'11).**

Source: IGD ShopperVista, base: all main shoppers, fieldwork Jan '12

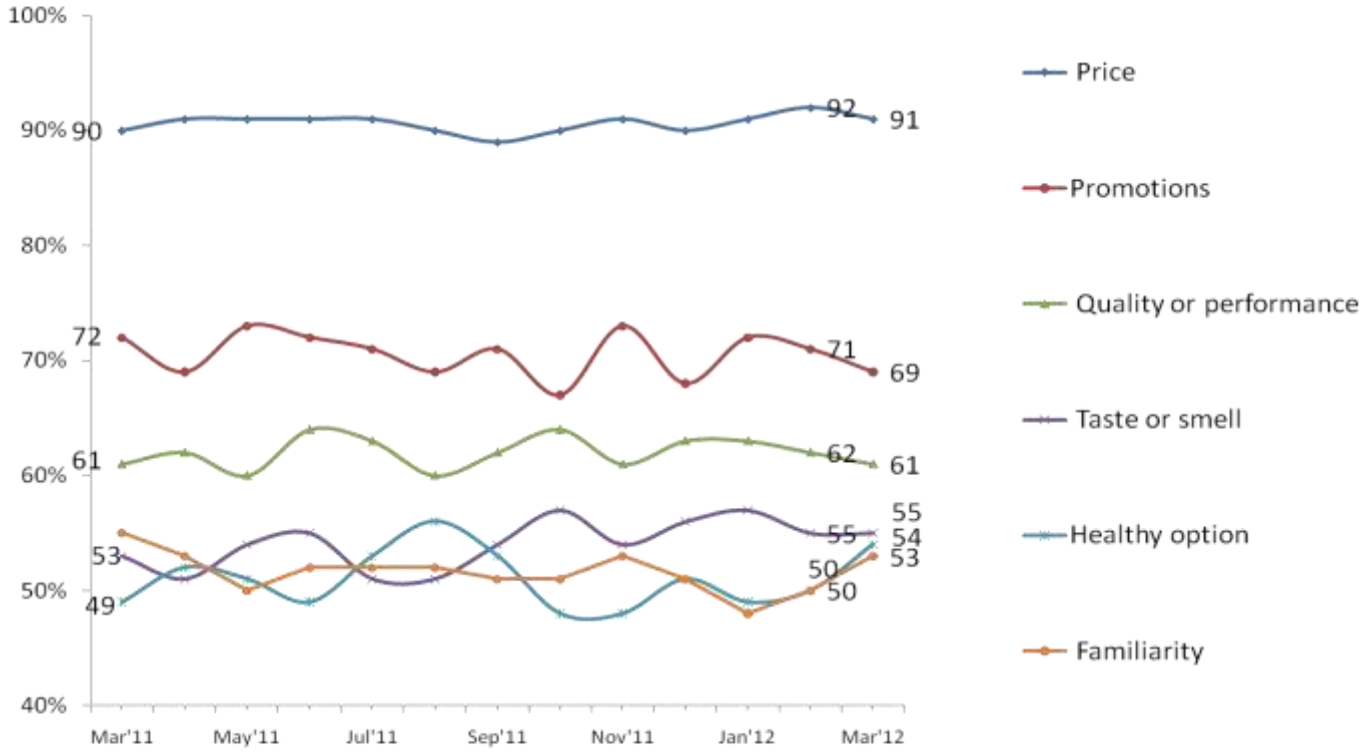
UK Shopper- Changing Habits



"They're buying less, wasting less, they're cooking differently, they're putting more things in the freezer."

Andrew Mann, Sainsbury's Director of Insight, on the shopper's re-adjustment to the economy

UK Shopper - Price / Promotions still dominate



Source: IGD ShopperVista, base: all main shoppers, fieldwork Jan '12

Retail Overview

Source: Nielsen Scan Track till roll data

Retail Overview

Asda is overhauling its fish counters with a new three-step system of buying fish in a bid to boost sales and improve its quality credentials. The service, launched in 302 stores in March, lets consumers choose from 20 varieties of fish and a selection of 11 'Chosen by you' marinades, sauces, flavoured butters and crumb toppings.

Shoppers can also choose to have the fish served in a microwave bag, oven bag or BBQ foil tray. The service will cost £4 for two fish portions (including container and flavouring). It follows earlier trials at four of the retailers' stores, which lead to a 15% increase in sales.

The move comes after online research by YouGov, commissioned by Asda, found one fifth of Brits do not buy fresh fish because they are put off by the smell and feel of raw fish and lack confidence in preparing and cooking it. Asda has invested £1.6m in developing the fish counters.

ASDA fish counter TV commercial

While Asda hopes its counters will spark shoppers' enthusiasm, rival Morrisons says it is the aficionado, with trained fishmongers on counters at 476 stores, stocking 50 types of fish. Boss Dalton Philips has unveiled plans for a fish factory in Grimsby which will fillet and portion seafood straight from the trawlers.

It will reportedly create 200 new jobs by the end of the year when the processing plant opens for business. Dalton said: "Nobody else is buying direct from the quayside, but we're doing it."

Source: The Grocer

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Retail Overview

TESCO

- **Tesco** plans to spend £1bn on revamping its UK operations as it looks to make the "shopping trip better for customers" and win back market share.
- **Tesco** is also planning a major overhaul in its Club Card scheme with the launch of a 'Love Loyals' programme designed to reward its best customers and the roll-out of a last-minute deals service.

Sainsbury's

- **Sainsbury's** has revealed that it will buy 18 Total petrol stations across the country as the retailer looks to expand its increasingly important fuel business and grow its convenience store division. Subject to approval from the OFT, the stores include seven Total-branded stations in London, as well as sites in the Midlands, Yorkshire and Lincolnshire

Source: Nielsen HomeScan, Grocers & NamNews

Retail Overview

- **Morrison's** has joined the increasingly frenetic dash to open convenience stores with its first M Local, a 2,500 sq. ft. c-store store on a petrol station forecourt. in Doncaster.

- The retailer has announced the return of its ‘Fresh In’ campaign with the arrival of Jersey Royal potatoes, and will later continue with the arrival of British strawberries, lamb and apples.

- **Waitrose** is the first supermarket chain in Scotland to sign up to an innovative distribution hub which gives its smaller suppliers across Scotland a more cost effective way to get products on its shelves. The Hub provides a central distribution point for Waitrose suppliers reducing administration, fuel and transportation costs.

- The Office of Fair Trading has approved The Co-operative Group’s purchase of Scottish convenience retailer, David Sands. The deal adds 28 food outlets, located in Fife, Kinross and Perthshire, to the Co-operative's food retail business.

Source: Nielsen HomeScan, Grocers & NamNews

Retail Overview

- **M&S** is expected to announce that it is stepping up its £600m revamp of its stores after a positive response from customers. The transformations, which include a more "local" approach towards product ranges, are expected to be extended to 550 of the retailer's 731 stores by summer 2013. Shares in M&S fell nearly 3% in early trading after the group revealed that its overall like-for-like sales fell 0.7% in the 13 weeks to 31st March, its fiscal fourth quarter.

- **Aldi** plans to introduce baskets into all its UK stores, following repeated requests from customers on Face book.

- **Lidl** is revamping its entire fresh meat and poultry range in a bid to push its growing British credentials. Under the new strapline 'Like Meat, Love Lidl'. Lidl unveiled new Birchwood and Strathvale branded meat and poultry packs, this week, carrying a watermark of the Union Jack to emphasize provenance.

Source: Nielsen HomeScan, Grocers & NamNews

Total Seafood

Source: Nielsen Scan Track till roll data

Total Seafood: 3 Year Moving Annual Total

	Value (£m)				Volume ('000 tonnes)					
	MAT 2010	MAT 2011	MAT 2012	**Val Chg 2012 (%)**	MAT 2010	MAT 2011	MAT 2012	**Vol Chg 2012 (%)**	Avg price 2011 (£/kg)	Avg price change 2012(%)
TOTAL SEAFOOD	2,778	2,798	2,936	**4.9**	369	362	356	**-1.8**	8.25	6.9
CHILLED	1,544	1,592	1,679	**5.5**	140	140	141	**0.7**	11.87	4.7
FROZEN	748	737	756	**2.6**	129	130	128	**-1.5**	5.92	4.2
AMBIENT	485	469	501	**6.8**	99	92	87	**-6.1**	5.78	13.7

Source: Nielsen Scan Track till roll data : 52wks to 31.3.12

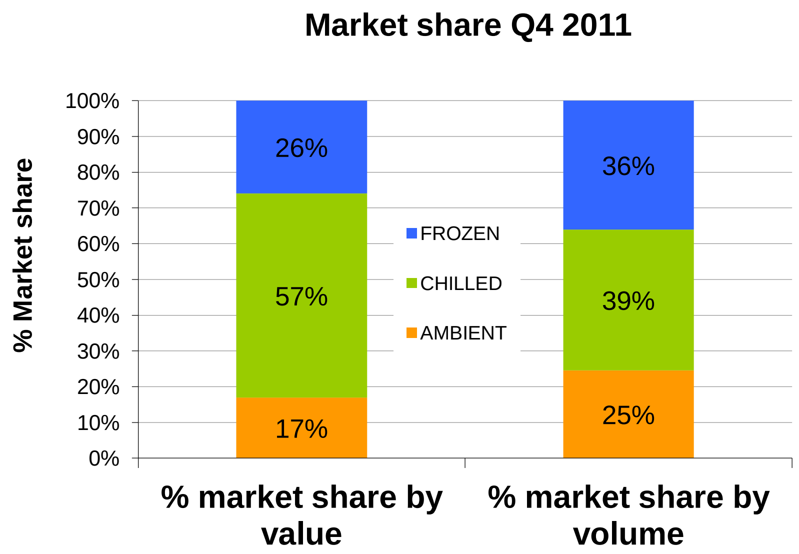
Commentary

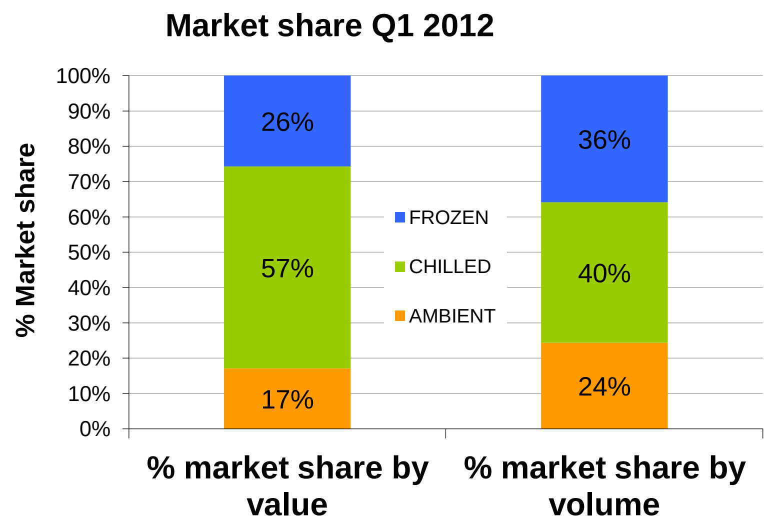
- Total Seafood up 4.9% in value , down 1.8 % in volume.
- Reflects the effect of inflationary price rises, retailer promotions, shoppers buying less per trip and some shoppers leaving the category altogether.
- To put this in context –
  - Food & non-alcoholic beverages rose by 4.6 per cent over the year to March 2012.
  - Categories other than seafood also saw price driven value gains;
    - Red Meat + 6.1 per cent
    - Bread & cereals + 4.8 per cent
    - Vegetables + 4.2 per cent rise
- Market Share Segmentation
  - Essentially flat for the period, almost no change in either volume or value

Source: Nielsen HomeScan, Scantrack

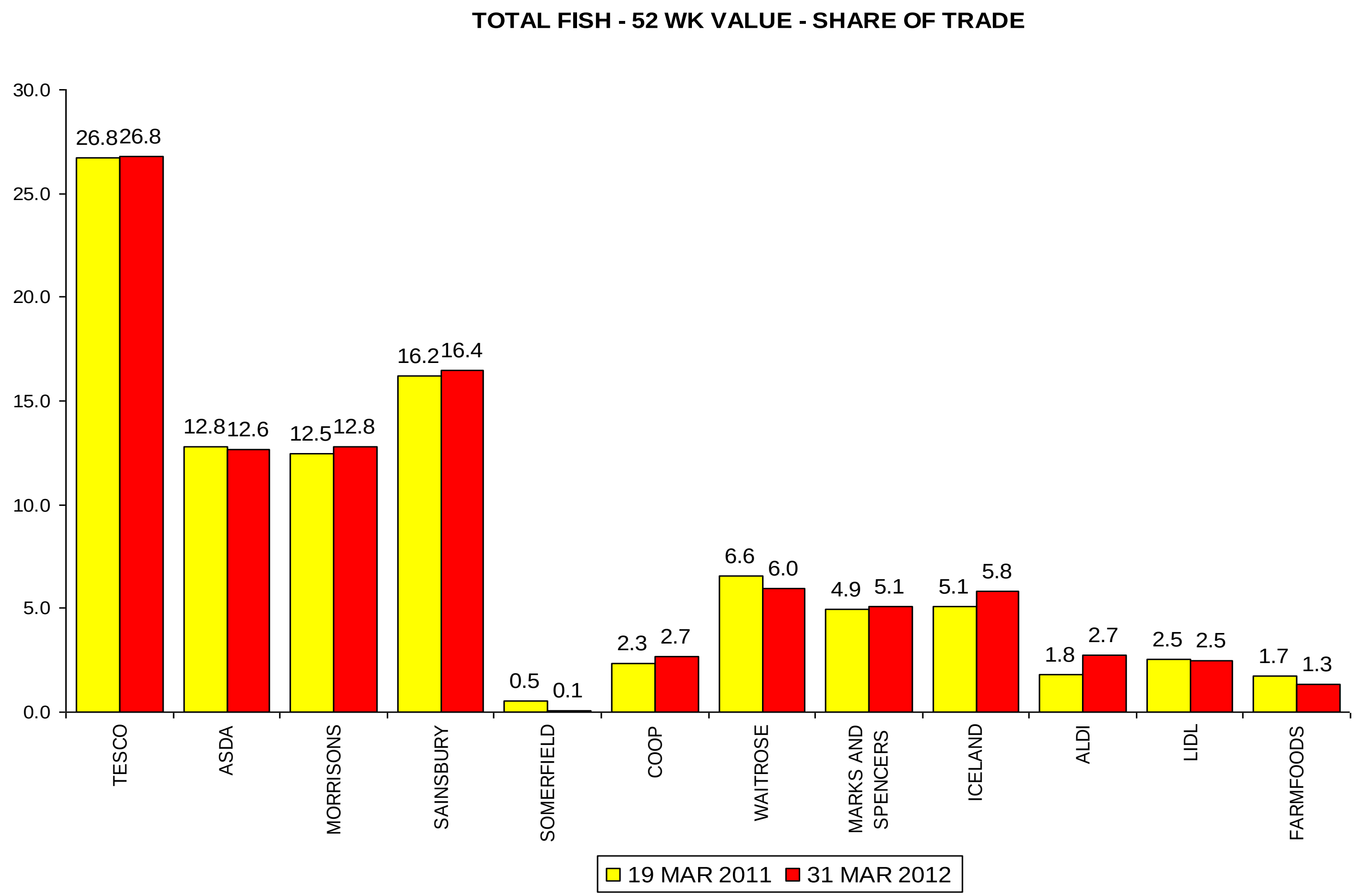
Market Segmentation Q4 2011 Vs. Q1 2012

52 w/e 07.01.12





Share of trade – Total Fish



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Commentary

Gains: Warm Water Prawns(WWP),Salmon.

- Chilled WWP.
  - Rose in price of 9% but with volumes dropping by around 8% value was flat for the 52 weeks, though still worth almost double that of Frozen.
- Frozen WWP
  - A price rise of 5% combined with a volume surge of 27% saw a consequent 34% rise in the value with Morrisons and M&S gaining share at the expense of Sainsbury's.
- Chilled Salmon
  - Chilled drove Salmon as volumes rose 10 % for the year but 22% for Q1, more than offsetting a slight decrease in price per Kg. Tesco's share of this rose 8%, year on year.

Source: Nielsen HomeScan, Scantrack

Commentary

Losses: Cold Water Prawns (CWP), Scampi

- Cold Water Prawns
  - Morrisons 'share of Chilled CWP sales leapt 66% (mainly at the expense of Tesco), as Tesco switched attention to frozen, its share up 22%
- Frozen Scampi
  - Losses in Frozen Scampi stem from squeezed shoppers leaving the category (penetration dipped 8%) as inflationary price rises and a drop in the amount sold on promotion (from 54% to 49%) took its toll.

Source: Nielsen HomeScan, Scantrack

Focus on Chilled

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Chilled

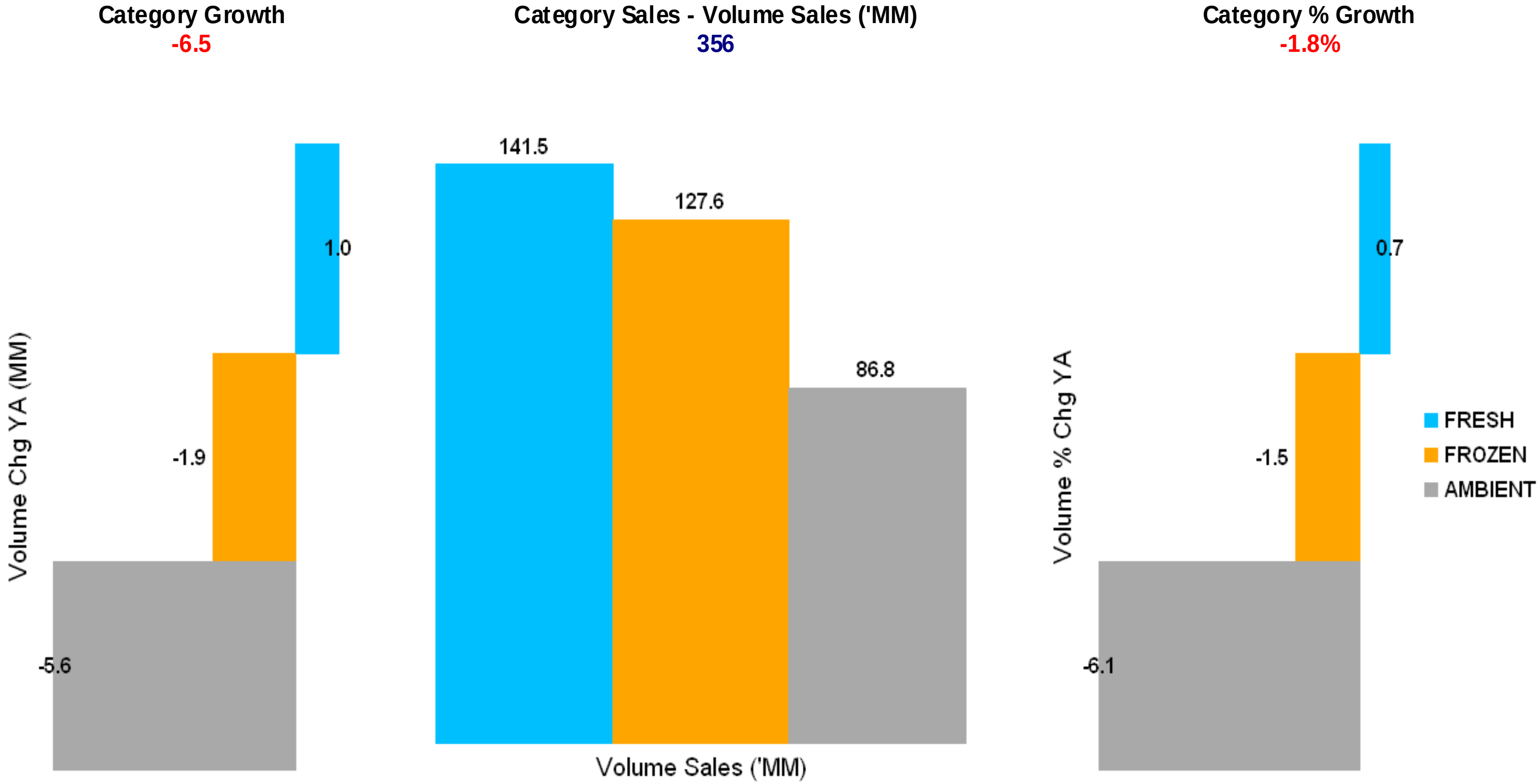
- Chilled Fish continues to be the largest sector and also the only sector driving volume growth. Chilled is also the largest contributor to value growth.

  - Worth £1,679m and has grown ahead of the category.
  - Generated £87m more than the last year.
  - Value sales are consistently growing due to price increase whilst the consumption has been almost stagnant.

- At total GB…Price per Kg and Increase in Basket Size has been the major drivers behind growth.
  - This is the same story for Tesco .
  - Morrisons has attracted growth from all the consumer measures resulting in an overall growth of 15% and has also seen the biggest gain from shifting – with the main gains from Tesco and Asda.

Source: Nielsen HomeScan, Scantrack

Category Overview - Volume



'MM = Millions

Total Coverage – MAT TY – Data to WE 31.03.12

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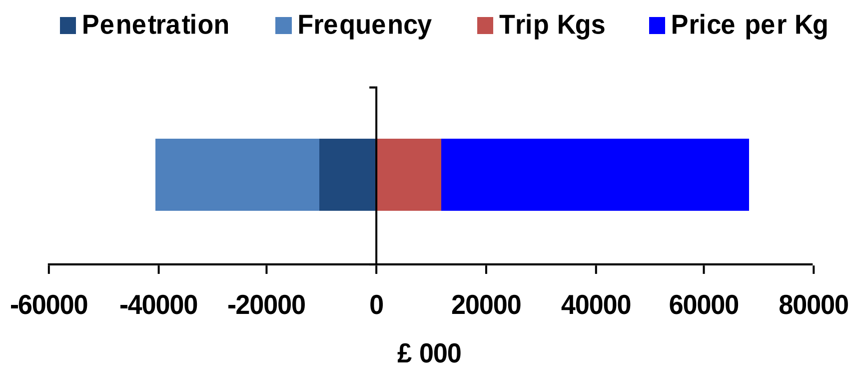
Chilled Fish KPI Measures Tree – Total GB

KPIs	Previous Period	Latest Period	Actual Change	% Change
Expenditure (£m)	888.1	916.1	28.1	3.16
Volume (Kgs m)	102.22	99.06	-3.16	-3.09
Penetration No. (000s)	20375	20146	-229	-1.12
Penetration %	78.31	77.05	-1.26	-1.61
Frequency	11.37	10.99	-.37	-3.28
AWP (Spend per Buyer)	43.59	45.47	1.89	4.33
AWP (Kgs per Buyer)	5.02	4.92	-.10	-2.00
Trip Spend	3.83	4.14	.30	7.87
Trip Kgs	.44	.45	.01	1.33
Price per Kg	8.69	9.25	.56	6.45
Spend on Offer %	37.42	38.97	1.55	4.13



Penetration No. (000s)
20146 -1.12%
Contribution = -£10.2m

Frequency
10.99 trips -3.28%
Contribution = -£30.1m

Expenditure
£916m +3.16%
Increase of £28.1m

Price per Kg
£9.25 +6.45%
Contribution = £56.4m

AWP (Spend per Buyer)
£45.47 +4.33%
Contribution = £38.2m

Trip Spend
£4.14 +7.87%
Contribution = £68.4m

Trip Kgs
0.45 Kgs +1.33%
Contribution = £11.9m

Source: Homescan 52 w/e 02-Apr-11 vs 52 w/e 31-Mar-12

Appendix – Species

Ranked Species: Total Fish

	VALUE £000'S				VOLUME 000's KGs				MAT % CHG	
	RANK	MAT -2	MAT -1	LAT MAT	RANK	MAT -2	MAT -1	LAT MAT	VALUE	VOLUME
TOTAL FISH		**2,777,630**	**2,797,929**	**2,936,202**		**368,876**	**362,386**	**355,868**	**4.9**	**-1.8**
SALMON	1	616,246	617,432	671,875	2	47,860	43,569	44,881	8.8	3.0
TUNA	2	341,511	327,801	349,797	1	71,498	66,951	63,169	6.7	-5.6
COD	3	312,081	307,209	316,875	3	40,769	41,289	40,704	3.1	-1.4
HADDOCK	4	214,376	221,869	231,463	4	24,456	27,036	26,714	4.3	-1.2
WARM WATER PRAWNS	5	189,253	200,078	219,503	6	15,265	16,005	16,618	9.7	3.8
COLD WATER PRAWNS	6	158,971	161,691	149,644	8	17,650	17,039	14,697	-7.5	-13.7
MACKEREL	7	93,264	99,341	112,644	7	15,386	15,774	15,980	13.4	1.3
POLLOCK	8	81,320	87,157	90,394	5	16,815	18,256	18,665	3.7	2.2
SCAMPI	9	57,234	60,328	53,753	10	6,239	7,092	5,857	-10.9	-17.4
SARDINES	10	33,252	32,645	34,093	9	7,594	7,066	6,321	4.4	-10.5
TROUT	11	37,175	33,045	32,286	13	4,171	3,467	3,294	-2.3	-5.0
PLAICE	12	27,795	26,198	29,680	15	2,754	2,634	2,868	13.3	8.9
MUSSELS	13	23,440	23,552	25,106	12	4,331	4,384	4,456	6.6	1.6
SEA BASS	14	23,325	24,286	24,991	17	1,505	1,831	1,819	2.9	-0.7
SOLE	15	25,548	24,171	22,330	19	1,824	1,831	1,696	-7.6	-7.3
CRABSTICK	16	17,766	18,398	20,775	11	4,221	4,350	4,523	12.9	4.0
KIPPER	17	18,153	17,207	16,789	14	3,322	3,196	2,884	-2.4	-9.8
CRAB	18	14,728	15,088	15,993	21	996	939	944	6.0	0.6
SCALLOPS	19	14,342	15,329	13,699	24	740	766	627	-10.6	-18.1
BASA	20	9,625	13,335	13,125	18	1,164	1,699	1,723	-1.6	1.4
ANCHOVY	21	10,330	11,233	11,223	23	580	635	635	-0.1	0.0
PILCHARDS	22	7,288	7,188	7,717	16	3,673	2,999	2,754	7.4	-8.2
SEA BREAM	23	4,062	5,976	7,380	26	314	436	540	23.5	23.8
HERRING	24	7,558	7,027	7,303	20	1,277	1,117	1,152	3.9	3.1
SQUID (CALAMARI)	25	4,852	5,740	7,078	27	415	393	430	23.3	9.3
COLEY	26	7,350	6,388	5,311	22	994	858	766	-16.9	-10.7
MONKFISH	27	4,917	4,976	4,542	34	97	96	89	-8.7	-7.0
COCKLES	28	4,758	4,544	4,383	25	738	606	597	-3.5	-1.5
HALIBUT	29	4,054	4,051	4,096	31	114	114	119	1.1	4.5
SKATE/RAY	30	2,982	3,082	3,077	32	102	101	103	-0.2	1.7
LOBSTER	31	4,370	3,393	3,035	35	197	110	84	-10.5	-23.3
WHITING	32	2,372	2,096	2,663	28	166	138	250	27.1	80.5
TILAPIA	33	2,065	1,747	2,378	30	96	82	139	36.1	69.0
CRAYFISH	34	4,319	2,880	2,354	29	327	201	144	-18.3	-28.4
HAKE	35	6,803	2,873	2,266	33	732	263	102	-21.1	-61.0

Source: Nielsen Scan Track till roll data : 52wks to 31.3.12

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Ranked Species: Total Chilled

	VALUE £000'S				VOLUME 000's KGs				MAT % CHG	
	RANK	MAT -2	MAT -1	LAT MAT	RANK	MAT -2	MAT -1	LAT MAT	VALUE	VOLUME
TOTAL FRESH		**1,544,458**	**1,591,856**	**1,678,683**		**140,406**	**140,484**	**141,481**	**5.5**	**0.7**
SALMON	1	483,363	496,529	552,599	1	31,156	28,775	31,663	11.3	10.0
WARM WATER PRAWNS	2	135,369	144,896	145,475	5	9,928	10,634	9,787	0.4	-8.0
COD	3	126,463	127,379	137,099	4	9,289	9,439	10,343	7.6	9.6
HADDOCK	4	117,331	121,541	130,192	2	9,782	10,373	10,486	7.1	1.1
COLD WATER PRAWNS	5	109,692	110,830	101,416	6	11,328	10,675	9,131	-8.5	-14.5
MACKEREL	6	62,368	66,219	73,851	3	10,459	10,548	10,413	11.5	-1.3
TROUT	7	36,639	33,042	32,286	9	4,122	3,467	3,294	-2.3	-5.0
TUNA	8	35,843	31,640	27,641	14	1,898	1,443	1,252	-12.6	-13.3
SEA BASS	9	20,579	22,012	23,241	12	1,352	1,690	1,707	5.6	1.0
PLAICE	10	20,278	19,586	23,056	11	1,768	1,707	2,007	17.7	17.6
MUSSELS	11	21,033	21,180	21,162	8	3,945	4,010	3,748	-0.1	-6.5
CRABSTICK	12	16,737	17,204	19,039	7	3,929	4,025	4,067	10.7	1.0
SOLE	13	21,089	19,276	18,165	13	1,397	1,373	1,370	-5.8	-0.2
KIPPER	14	13,030	12,670	12,861	10	2,381	2,452	2,251	1.5	-8.2
SCALLOPS	15	10,152	11,984	10,648	20	452	536	461	-11.1	-13.9
CRAB	16	8,797	9,684	10,392	18	451	502	517	7.3	3.1
SEA BREAM	17	4,014	5,976	7,380	17	309	436	540	23.5	23.8
SQUID (CALAMARI)	18	2,900	4,362	5,927	21	187	243	317	35.9	30.6
HERRING	19	5,784	5,134	5,267	15	953	811	816	2.6	0.6
MONKFISH	20	4,894	4,976	4,542	31	96	96	89	-8.7	-7.0
POLLOCK	21	6,938	2,687	4,536	16	947	339	787	68.8	132.2
BASA	22	3,210	5,007	4,149	19	343	596	498	-17.1	-16.4
HALIBUT	23	4,054	4,051	4,096	26	114	114	119	1.1	4.5
SCAMPI	24	5,507	7,100	4,036	23	480	650	275	-43.2	-57.6
ANCHOVY	25	3,698	3,532	3,278	24	210	202	188	-7.2	-7.3
SARDINES	26	1,718	2,565	3,242	22	171	234	297	26.4	26.8
SKATE/RAY	27	2,982	3,082	3,077	30	102	101	103	-0.2	1.7
LOBSTER	28	3,284	2,823	2,633	35	124	79	63	-6.7	-20.0
CRAYFISH	29	4,319	2,880	2,353	25	327	201	144	-18.3	-28.4
TILAPIA	30	2,017	1,662	2,147	29	87	66	104	29.2	58.5
SWORDFISH	31	1,382	1,458	2,029	33	61	62	76	39.2	21.1
WHITING	32	2,168	1,990	2,025	27	125	121	114	1.7	-5.4
COLEY	33	1,939	1,972	1,911	28	128	119	109	-3.1	-8.8
HAKE	34	2,969	1,505	1,862	34	214	72	64	23.8	-11.0
EEL	35	1,436	1,184	1,083	32	104	92	83	-8.5	-10.3

Source: Nielsen Scan Track till roll data
: 52wks to 31.3.12

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Ranked Species: Total Frozen

	VALUE £000'S				VOLUME 000's KGs				MAT % CHG	
	RANK	MAT -2	MAT -1	LAT MAT	RANK	MAT -2	MAT -1	LAT MAT	VALUE	VOLUME
FROZEN		747,860	736,700	756,058	4,845	129,403	129,554	127,636	2.6	-1.5
COD	1	185,598	179,828	179,776	1	31,478	31,850	30,360	-0.0	-4.7
HADDOCK	2	97,045	100,329	101,272	3	14,674	16,663	16,228	0.9	-2.6
POLLOCK	3	74,382	84,470	85,858	2	15,868	17,917	17,878	1.6	-0.2
WARM WATER PRAWNS	4	53,643	55,023	73,896	4	5,291	5,343	6,807	34.3	27.4
SCAMPI	5	51,727	53,228	49,717	5	5,759	6,442	5,582	-6.6	-13.4
COLD WATER PRAWNS	6	49,164	50,818	48,219	6	6,305	6,359	5,565	-5.1	-12.5
SALMON	7	47,171	43,264	41,663	7	5,706	5,333	4,887	-3.7	-8.4
BASA	8	6,414	8,327	8,976	8	821	1,103	1,225	7.8	11.0
PLAICE	9	7,517	6,612	6,623	9	986	927	862	0.2	-7.1
TUNA	10	3,545	3,732	4,385	11	426	438	538	17.5	22.8
SOLE	11	4,459	4,895	4,165	15	428	457	326	-14.9	-28.8
COLEY	12	5,412	4,417	3,400	10	866	739	657	-23.0	-11.0
SCALLOPS	13	4,156	3,310	3,003	16	286	229	164	-9.3	-28.4
MUSSELS	14	527	461	2,021	12	113	103	464	338.8	349.1
KIPPER	15	3,026	2,438	2,014	14	580	428	344	-17.4	-19.8
SEA BASS	16	2,746	2,274	1,750	18	153	141	111	-23.0	-21.0
CRABSTICK	17	1,029	1,194	1,736	13	292	325	456	45.3	40.2
SQUID (CALAMARI)	18	1,757	1,179	923	19	212	134	96	-21.7	-28.4
WHITING	19	205	106	638	17	41	18	136	504.4	661.2
MACKEREL	20	414	231	627	20	42	22	69	171.0	216.7
HAKE	21	3,834	1,368	404	21	519	191	38	-70.5	-80.0
LANGOUSTINE	22	157	145	289	23	21	18	34	99.0	90.9
TILAPIA	23	48	85	231	22	10	17	35	172.8	110.2
CRAB	24	158	6	218	25	30	1	20	3767.5	1680.3
COCKLES	25	213	377	185	26	12	24	11	-51.1	-52.7
SARDINES	26	208	263	139	24	86	109	22	-47.3	-79.5
LOBSTER	27	843	315	100	28	62	20	8	-68.1	-61.3
DAB	28	257	272	98	27	25	25	8	-63.9	-67.8
GEFILTE	29	0	1	4	29	0	0	1	218.0	213.2
SNAPPER	30	4	3	2	30	0	1	0	-45.0	-44.8

Source: Nielsen Scan Track till roll data
: 52wks to 31.3.12

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Ranked Species: Total Ambient

	VALUE £000'S				VOLUME 000's KGs				MAT % CHG	
	RANK	MAT -2	MAT -1	LAT MAT	RANK	MAT -2	MAT -1	LAT MAT	VALUE	VOLUME
TOTAL AMBIENT		**485,313**	**469,373**	**501,461**		**99,067**	**92,348**	**86,750**	**6.8**	**-6.1**
TUNA	1	302,123	292,428	317,770	1	69,174	65,069	61,379	8.7	-5.7
SALMON	2	85,712	77,638	77,613	2	10,998	9,461	8,331	-0.0	-11.9
MACKEREL	3	30,482	32,891	38,166	4	4,885	5,204	5,498	16.0	5.6
SARDINES	4	31,326	29,817	30,713	3	7,337	6,723	6,002	3.0	-10.7
ANCHOVY	5	6,632	7,701	7,945	7	370	433	447	3.2	3.4
PILCHARDS	6	7,288	7,188	7,717	5	3,673	2,999	2,754	7.4	-8.2
CRAB	7	5,773	5,399	5,384	8	514	436	407	-0.3	-6.7
COCKLES	8	3,970	3,979	3,910	6	472	489	464	-1.7	-5.1
HERRING	9	1,774	1,893	2,036	9	324	306	336	7.5	9.7
MUSSELS	10	1,881	1,912	1,923	11	272	271	244	0.6	-9.7
KIPPER	11	2,097	2,099	1,914	10	361	315	289	-8.8	-8.4
COD ROE	12	1,599	1,607	1,736	12	247	222	225	8.0	1.0
SILD	13	1,185	1,192	992	13	123	112	91	-16.8	-19.0
OYSTERS	14	487	472	505	17	24	21	22	6.9	4.2
CAVIAR	15	790	389	348	23	22	9	8	-10.6	-5.6
SALMON ROE	16	0	280	322	24	0	3	3	14.9	14.7
LOBSTER	17	243	255	302	19	11	11	13	18.1	23.8
SPRATS	18	162	236	277	14	28	39	45	17.5	14.2
OCTOPUS	19	384	298	233	21	25	19	12	-21.7	-34.9
SQUID (CALAMARI)	20	195	199	227	18	16	17	17	14.2	0.8
HERRING ROE	21	218	247	137	20	20	23	12	-44.5	-45.7
CLAMS	22	169	173	134	15	37	36	27	-22.4	-25.6
WARM WATER PRAWNS	23	241	160	131	16	45	28	25	-18.2	-12.3
GEFILTE	24	72	98	83	22	9	12	11	-15.2	-7.8
SCALLOPS	25	34	35	48	25	1	2	2	37.8	38.3
COLD WATER PRAWNS	26	115	43	8	26	16	6	1	-80.8	-88.5
CRAYFISH	27	0	0	1	27	0	0	0		
CARP	28	5	1	0	28	1	0	0	-98.7	-98.8

Source: Nielsen Scan Track till roll data : 52wks to 31.3.12

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Appendix - Retail

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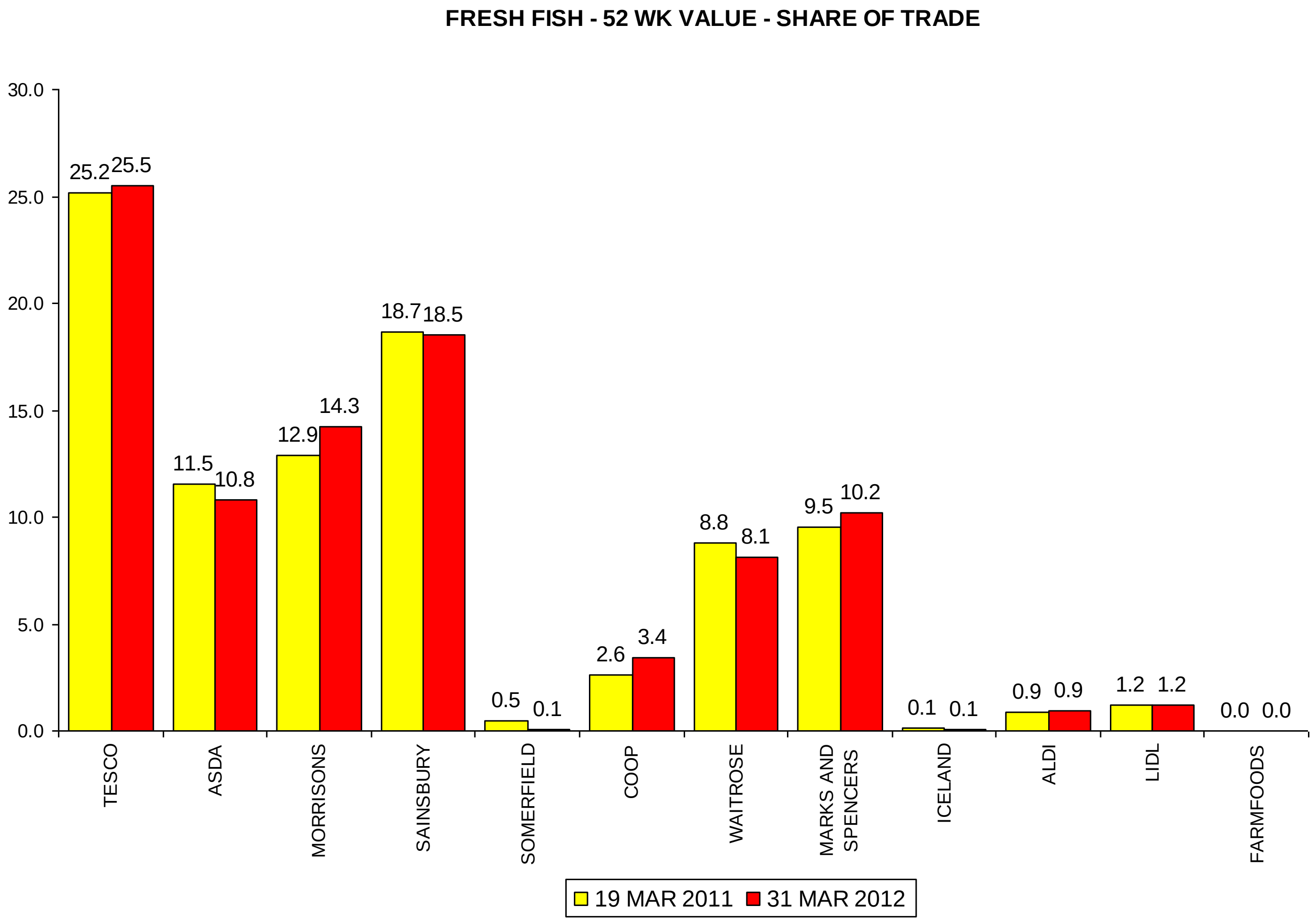
Share of trade – Chilled Fish



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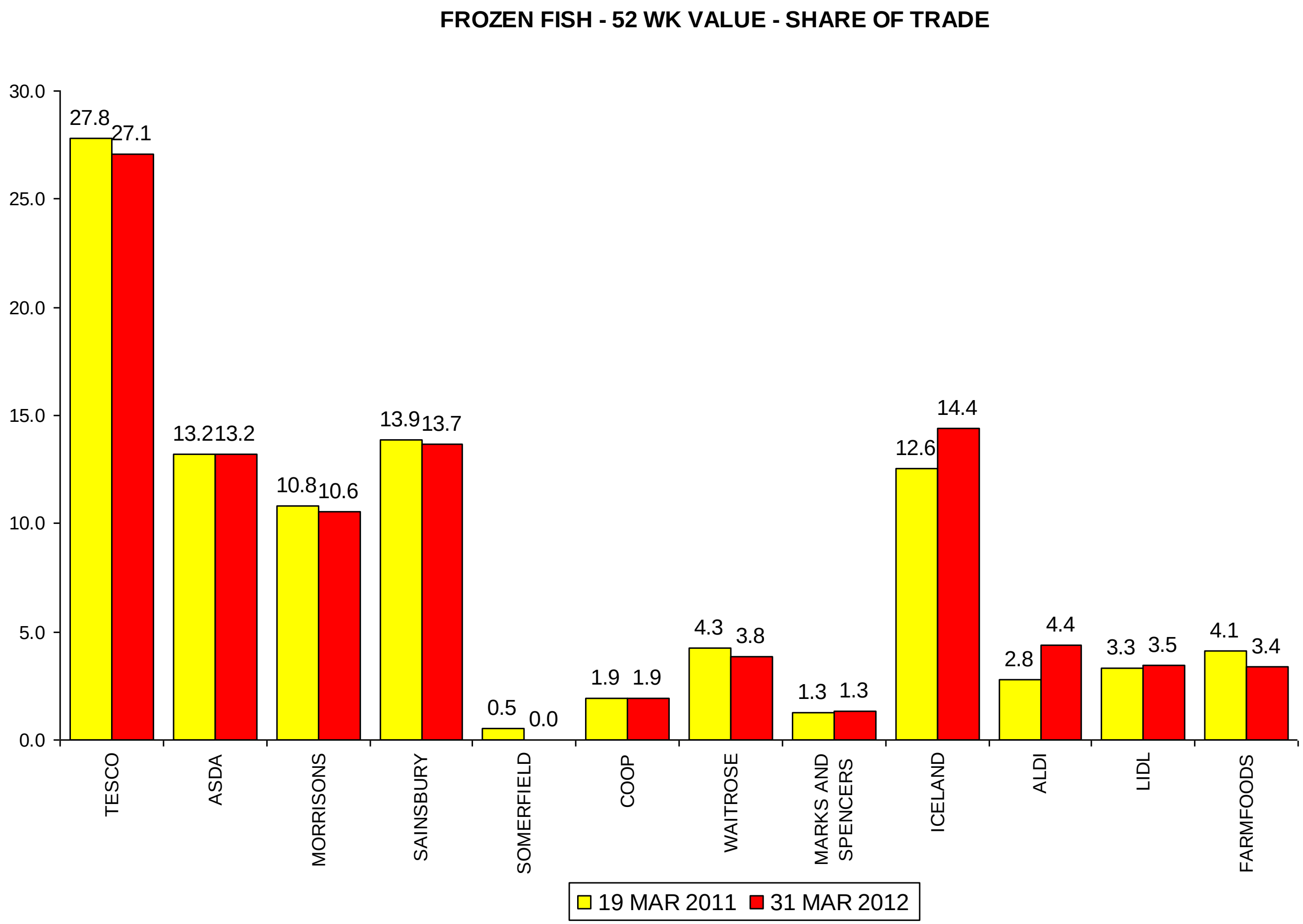
Share of trade – Frozen Fish



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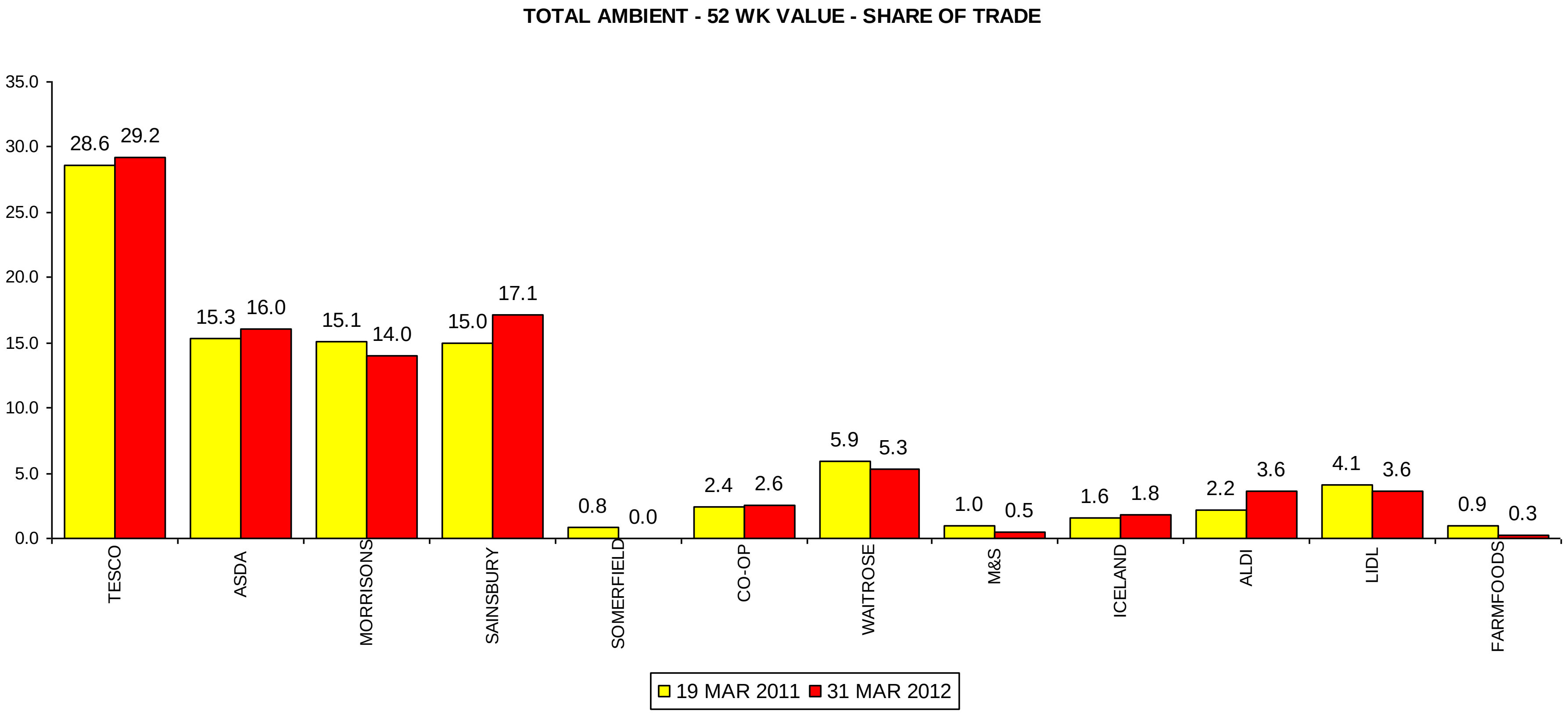
Share of trade – Total Ambient



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Retail by Numbers

Share of Trade

	Share of Total Grocers 2011	Share of Total Grocers 2012	Value %	Penetration	Penetration 2012	Penetration % Change	£ Spend per Visit 2011	£ Spend per Visit 2012	£ Spend per Visit % Change
TESCO	31.1	30.8	5.8	84.8	85.5	1.3	28.63	29.69	+3.7
ASDA	16.6	16.9	9.0	67.2	69.1	3.4	29.23	30.02	+2.7
Sainsbury's	17.4	17.4	6.7	65.9	66.5	1.4	28.20	29.15	+3.4
M MORRISONS	13.4	13.2	4.9	59.5	60.7	2.6	26.11	26.94	+3.2
The co-operative food	3.8	3.6	0.6	52.6	50.2	-4.1	10.08	10.93	+8.4
Waitrose	4.7	4.7	6.3	22.1	23.8		31.25	32.37	+3.6
[illegible]	2.7	2.8	9.8	40.3	40.7	1.7	13.47	14.36	+6.6
YOUR M&S	2.2	2.3	15.1	42.8	43.2	1.5	14.64	15.93	+8.8
ALDI	2.5	3.4	42.3	34.5	37.8	10.3	15.22	17.29	+13.6
LIDL	3.0	3.3	18.6	39.9	40.4	1.8	14.71	15.76	+7.1

Store Portfolio

	Store Numbers Total	Convenience	Small	Large	Super	Mega
TESCO	2276	1418	30	310	171	347
ASDA	503		114	62	91	236
Sainsbury's	1007	440	55	177	159	176
M MORRISONS	474		24	187	220	43
The co-operative food	3744	2557	913	274		
Waitrose	277	6	42	188	35	6
[illegible]	725	70	655			
YOUR M&S	661	215	273	162	10	1

SOT based on Total FMCG, Benchmark Total Grocers

% Change Penetration = % Change in actual buyers

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Retail by Numbers

Lifestage

	Pre-Family	New Family	Maturing Family	Established Family	Post Family	Older Couples	Older Singles
TESCO	111	132	118	103	96	87	90
ASDA	103	112	132	117	102	80	80
Sainsbury's	146	80	89	83	109	97	105
Morrisons	71	72	78	104	99	126	97
The co-operative food	73	74	62	91	122	95	156
Waitrose	79	74	89	115	100	119	79
[illegible]	88	96	132	149	106	66	93
YOUR M&S	69	52	47	68	99	138	148
ALDI	89	77	74	101	81	134	98
LIDL	61	78	79	85	91	131	115

Definitions

- All data is sourced to Nielsen Scan Track EPOS (till roll data).
- MAT = moving annual total – 52 weeks
- Segment definitions
  - **Sushi** – include all sushi, where fish & seafood are contained within.
  - **Fingers** – include all fish & seafood which are described as fingers.
  - **Cakes** – include all fish & seafood which are described as cakes.
  - **Sauce** – include all fish & seafood which is described as being in a sauce.
  - **Batter** –include all fish & seafood which is described as being coated in batter or battered.
  - **Breaded** – include all fish & seafood which is described as being coated in breadcrumbs or breaded.
  - **Prepared** – include all fish & seafood which has been treated/prepared in some way and is not included within the above values. Eg all fish & seafood sticks including sticks with a dipping sauce.
  - **Natural** – include all fish & seafood which has not been treated in any way.

- All segments can be further broken down into smoked/unsmoked and organic/standard, chilled/frozen /ambient and by species

Seafish Market Information Links

Market Data now has a new home on the main Seafish website.

This data is available to seafood businesses only.

For the password and username send an email to r_watson@seafish.co.uk or if out of the office t_jordan@seafish.co.uk with "receive market e-alert" in the email subject, and name and organisation details in the email body.

Key Data & Reports

- **Trade Reports**
- **Nielsen Retail Reports**
- **Latest Nielsen Total Till & Essential Retail Reports**
- **Q4 Retail Report Summary December 2011**
- **2011 trade summary**
- **Seafood Export Profiles**
- **Landings and Quota**