Seafood Industry Factsheet

Frozen Seafood in Multiple Retail 2016

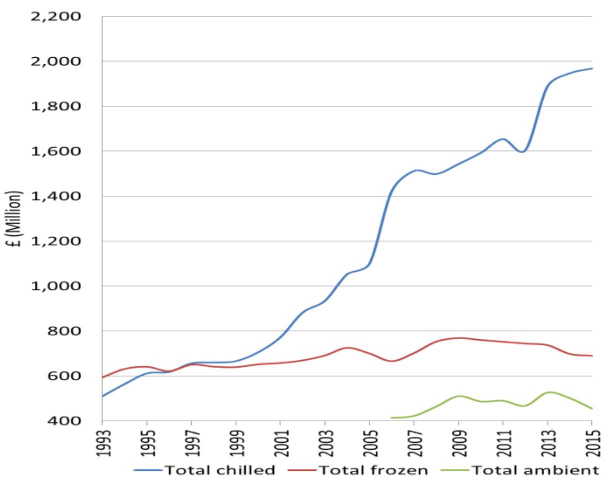
British shoppers have fallen out of love with frozen seafood. Over the past 8 years none of the frozen segments have experienced volume growth. But, over the past 12 months frozen natural and frozen dusted seafood are leading the recovery.

August 2016

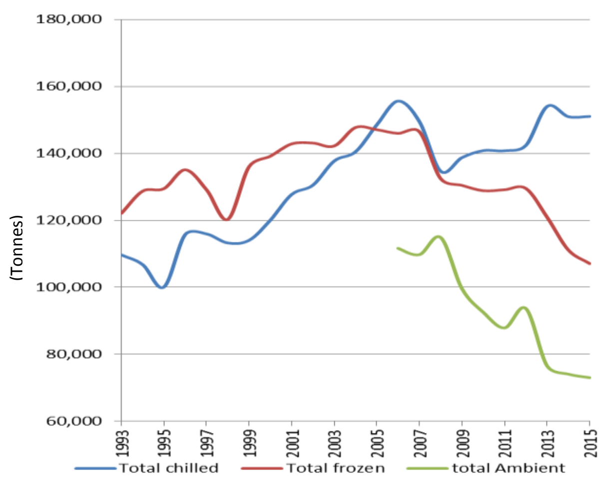
Historic Seafood Sector Trends

GB Retail value sales of frozen seafood have remained fairly flat over the past 20 years compared with chilled. In the late 1990's both the volume and value of chilled seafood began to rise faster than that of frozen and ambient seafood. By 2005, chilled seafood had overtaken frozen seafood in volume sales. Seafood volumes had been growing slowly but steadily until recession hit the UK in 2007. The relatively high price of seafood meant it struggled to compete with cheaper everyday proteins. Initially, frozen saw a brief period of growth as shoppers reined in their spending and again in 2012 as the UK fell further into recession. But a couple of years into austerity, retail shoppers became polarized, saving money where possible on basics, but not averse to spending on treats. Austerity focused shopper priorities on value for money, and the perceived 'superior freshness, health and quality' of chilled seafood resulted in continued growth of the chilled sector whilst frozen and ambient have fallen into decline. From 1993 to 2015, frozen seafood experienced price driven growth, volume fell by -12%, with value increasing by 16%. In comparison, chilled seafood increased retail volume by 38% and value by 254%.

Long Term Seafood Sector Value Trends



Long Term Seafood Sector Volume Trends



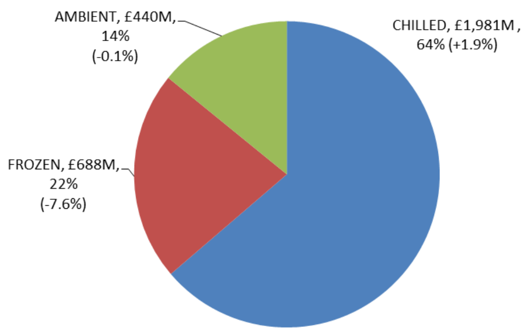
(Data: Nielsen Scantrack)

Current Seafood Sector Performance

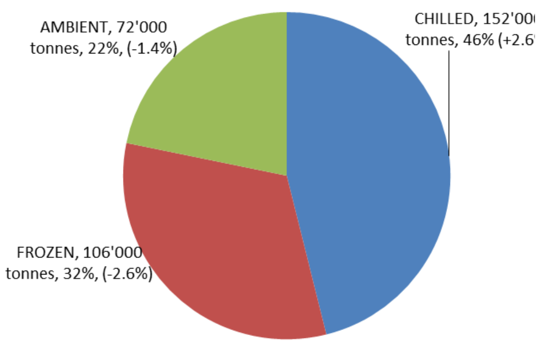
In 2016, total GB seafood sales were worth £3.11bn (-0.2%), with a volume of 329,096 tonnes (-0.8%) and an average price of £9.45/kg (+0.6%) (AC Nielsen Scantrack: 52 weeks to May 21st excluding discounters). Over the 8 years from May 2008 to May 2016, total seafood has been in price driven growth, with volume down by -15% and value up by 15%, pushing average price by 35.9%.

In the 52 wks. to May 16, frozen seafood took the second largest share of both value and volume worth £688m (-0.3%) and a volume of 105,622 tonnes (-3.3%); with an average price of £6.52/kg (+3.1%). Over the 8 years from May 2008 to May 2016, frozen seafood has been in decline, with volume down by -22% and value down by -5%, average price grew by 22.3%. In comparison, chilled volume grew by 10% and value grew by 29%, average price up by 18%. In 2016, frozen seafood took a 22% share of the seafood retail market by

Sector Value Share of Seafood 2016



Sector Volume Share of Seafood 2016



(Data: Nielsen Scantrack – 52wks to 21.5.16)

value and 32% by volume. Over the past 8 years, frozen and ambient have decreased volume share by -8.4% and -26% respectively, whilst chilled has increased retail volume share by 29%.

Frozen Seafood KPI's

In the 52wks to 21st May 2016, fewer shoppers bought frozen seafood as average price increased. Penetration remained significantly higher than that of chilled or ambient seafood, with 87% of shoppers buying frozen. Compared with the previous year, shoppers bought frozen seafood more often and basket size remained unchanged. On average, frozen shoppers bought 0.6kg of frozen fish per trip spending £3.40; buying frozen seafood 10.9 times per year, spending a total of £36.80, equating to 6.1kg

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Seafood Key Performance Indicators (KPI's)

		Penetration %	Freq	AWOP (Kg) 52w	Avg Spend (£) 52w	Trip Spend	Price per Kg	Avg Trip Kg
TOTAL	23 MAY 2015	96.8	28.8	14.9	116.0	4.0	7.8	0.5
	21 MAY 2016	96.7	29.4	15.2	119.1	4.1	7.8	0.5
	% Change	-0.1	2.1	1.9	2.7	0.6	0.7	-0.1
CHILLED	23 MAY 2015	80.3	18.0	7.5	78.5	4.4	10.5	0.4
	21 MAY 2016	80.5	18.9	7.7	82.0	4.3	10.7	0.4
	% Change	0.2	5.2	3.1	4.5	-0.6	1.3	-2.0
FROZEN	23 MAY 2015	87.1	10.9	6.1	35.7	3.3	5.8	0.6
	21 MAY 2016	87.0	10.9	6.1	36.8	3.4	6.0	0.6
	% Change	-0.1	0.4	0.3	3.2	2.8	2.8	-0.0
AMBIENT	23 MAY 2015	79.9	9.1	3.9	22.7	2.5	5.8	0.4
	21 MAY 2016	80.0	9.0	4.0	21.5	2.4	5.4	0.4
	% Change	0.1	-1.5	1.8	-5.3	-3.9	-7.1	3.4

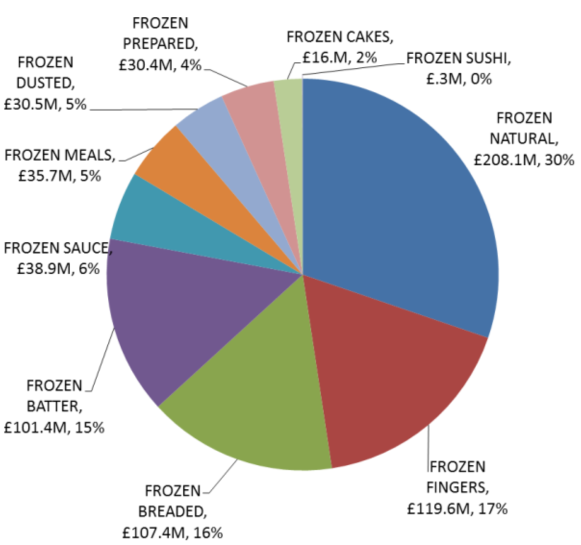
(Data: Nielsen Homescan – 52wks to 21.5.16)

Frozen Seafood Segment Performance

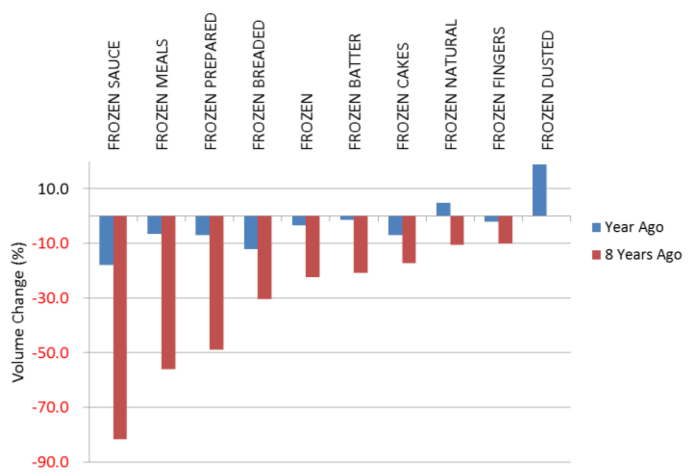
It is the frozen natural (simple frozen fillets or shellfish) segment which takes the largest share by both volume (40%) and value (30%) of the frozen seafood sector. In the 52wks to 21st May 2016, frozen natural was worth £208.1 m, with 21,974 tonnes and an average price of £9.47/kg. Frozen natural has one of the highest average prices of all the frozen segments, second only to frozen sushi. Frozen fingers (17%), breaded (16%) and battered (15%) are ranked second, third and fourth, respectively by frozen value share.

Over the 8 years to May 2016, none of the frozen segments were in growth; frozen natural and fingers saw an increase in value as a result of inflation and lost the least volume. Frozen sauce and frozen seafood meals were the hardest hit, losing over -50% volume. Over the short term (52 wks. to May 16) many frozen segments remained in decline, but frozen natural and dusted (a recently coded segment) showed strong volume and value growth, dusted being perceived as a healthier and flavorsome alternative to breaded and battered. Frozen sauce, breaded and prepared showed the greatest declines.

Segment Share of Frozen 2016 (value)



Long & Short Term Frozen Segment Volume Trends (2016 vs 2008)



(Data: Nielsen Scantrack – 8yrs/52wks to 21.5.16)

Frozen Segment Performance

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2014	2015	2016	% Chg YA	% Chg 2008 vs 2016 (8YA)	2014	2015	2016	% Chg YA	% Chg 2008 vs 2016 (8YA)	£/Kg 2016	% Chg YA	% Chg 2008 vs 2016 (8YA)
TOTAL SEAFOOD	3,145,194	3,114,909	3,109,330	-0.2	15	341,208	331,599	329,096	-0.8	-15	£9.45	0.6	35.9
TOTAL CHILLED	1,917,487	1,947,933	1,981,338	1.7	29	151,310	149,055	151,750	1.8	10	£13.06	-0.1	18.0
TOTALFROZEN	718,627	690,298	688,406	-0.3	-5	116,475	109,248	105,622	-3.3	-22	£6.52	3.1	22.3
TOTAL AMBIENT	509,080	476,678	439,586	-7.8	-0	73,423	73,296	71,724	-2	-37	£6.13	-5.8	58.2
FROZEN NATURAL	195,285	194,010	208,131	7.3	15	22,555	20,974	21,974	4.8	-10	£9.47	2.4	28.4
FROZEN FINGERS	127,582	123,889	119,636	-3.4	3	27,148	26,248	25,702	-2.1	-10	£4.65	-1.4	14.5
FROZEN BREADED	132,899	115,786	107,408	-7.2	-20	19,597	16,853	14,809	-12.1	-30	£7.25	5.6	15.5
FROZEN BATTER	101,721	98,928	101,362	2.5	-16	17,575	16,621	16,383	-1.4	-21	£6.19	4.0	6.6
FROZEN SAUCE	45,997	44,160	38,934	-11.8	-60	6,328	6,018	4,934	-18.0	-82	£7.89	7.5	122
FROZEN MEALS	41,035	37,097	35,667	-3.9	-49	10,956	10,185	9,512	-6.6	-56	£3.75	2.9	15.7
FROZEN DUSTED	21,749	25,177	30,526	21.2	N/A	2,621	3,057	3,633	18.8	N/A	£8.40	2.0	N/A
FROZEN PREPARED	33,118	34,079	30,411	-10.8	-48	4,723	4,705	4,380	-6.9	-49	£6.94	-4.2	1.0
FROZEN CAKES	19,241	17,172	16,034	-6.6	-14	4,974	4,586	4,270	-6.9	-17	£3.76	0.3	3.9
FROZEN SUSHI	-	1	296	-	N/A	-	0	25	-	N/A	£11.95	-	N/A

(Data: Nielsen Scantrack – 8yrs/52wks to 21.5.16)

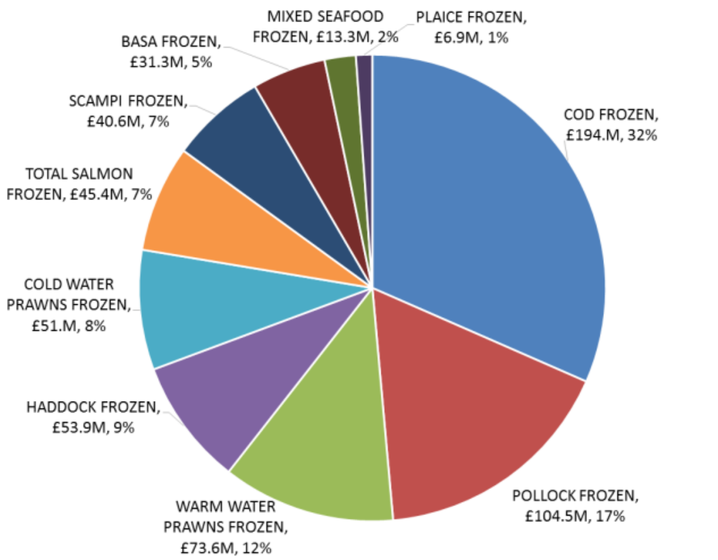
Frozen Seafood Species

In 2016, cod dominates the frozen seafood sector with a 32% value share, selling nearly twice its nearest competitor, by value. Lower prices and improved availability have driven cod consumption in recent years. In the 52wks to 21st May 2016, frozen cod was worth £194m, with 31,579 tonnes, with volume and value increasing by 9.3% and 6.7 respectively. Pollock, is the next most popular species with 17% value share, followed closely by warm water prawns (12%), haddock (9%) and cold water prawns (8%).

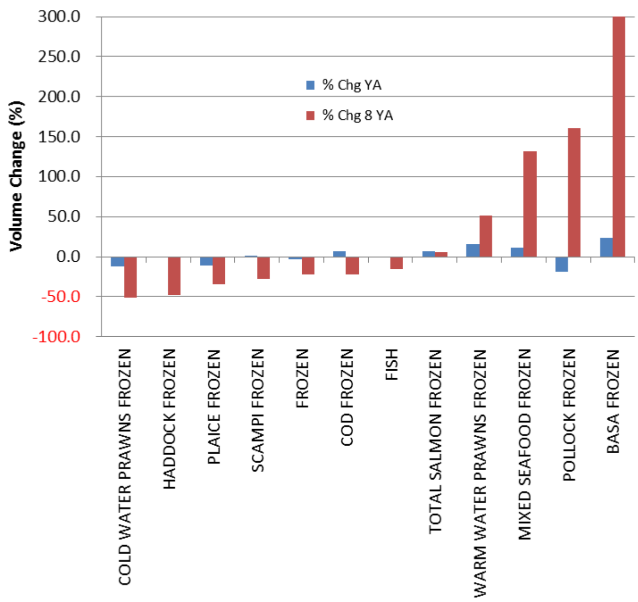
The consumption of traditional whitefish species has been in steady decline since the 1980's, whilst salmon and other aquacultured seafood species have grown in popularity. As a format, frozen has outperformed chilled and ambient for whitefish and shellfish. From 1974 to 2013, chilled whitefish consumption (-62.3%) has declined at almost twice the rate of frozen whitefish (-30.9%) over the same period (Defra Family Food). Likewise, frozen shellfish consumption (746%) has grown faster than that of chilled (444%).

Over the 8 years to May 2016, frozen basa, pollock, mixed seafood and warm water prawns were the key species in growth. Frozen species in full decline were, cod, haddock and

Top 10 Frozen Species Share (value) 2016



Long & Short Term Frozen Segment volume trends (2016 vs 2009)



(Data: Nielsen Scantrack – 8yrs/52wks to 21.5.16)

cold water prawns. Significant price increases typically impact negatively on volume; but the price increases seen for cod and haddock, at 9.6% and 12.2% respectively, were relatively modest compared to other species. Cold water prawns however experienced a significant price increase of 66.3% over the same period; this undoubtedly impacted on volumes. Frozen haddock performed poorly, with volume and value down -42% and -48% respectively; competing with relatively new species like basa (Pangasius) which has grown from a small base. Basa is predicted to overtake haddock in popularity in the next 3 years if current trends continue.

Long and Short Term Frozen Species Performance

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2014	2015	2016	% Chg YA	% Chg 2008 vs 2016 (8YA)	2014	2015	2016	% Chg YA	% Chg 2008 vs 2016 (8YA)	Avg Price 2016	Avg Price % Chg vs 2015	Avg % Chg 2008 vs 2016 (8YA)
FISH	3,145,194	3,114,909	3,109,330	-0.2	15	341,208	331,599	329,096	-0.8	-15	£9.45	0.6	36.0
FROZEN	718,627	690,298	688,406	-0.3	-5	116,475	109,248	105,622	-3.3	-22	£6.52	3.1	22.3
COD FROZEN	176,922	177,584	194,042	9.3	-14	29,437	29,596	31,579	6.7	-22	£6.14	2.4	9.6
POLLOCK FROZEN	143,850	135,700	104,541	-23.0	195	31,552	29,212	23,707	-18.8	160	£4.41	-5.1	13.4
WARM WATER PRAWNS FROZEN	66,693	67,893	73,585	8.4	85	5,813	5,381	6,215	15.5	51	£11.84	-6.2	22.8
HADDOCK FROZEN	70,798	53,953	53,894	-0.1	-42.00	10,255	7,401	7,391	-0.1	-48.32	£7.29	0.0	12.2
COLD WATER PRAWNS FROZEN	57,447	50,562	51,047	1.0	-19	6,733	5,318	4,647	-12.6	-51.04	£10.98	15.5	66.3
TOTAL SALMON FROZEN	45,723	45,377	45,381	0.0	21	5,583	5,776	6,147	6.4	6	£7.38	-6.0	13.84
SCAMPI FROZEN	42,001	39,569	40,558	2.5	-21.76	4,170	3,947	3,968	0.5	-28	£10.22	2.0	7.9
BASA FROZEN	19,150	25,869	31,334	21.1	2,447	2,549	3,610	4,445	23.1	2,530	£7.05	-1.6	-3.1
MIXED SEAFOOD FROZEN	10,256	11,084	13,293	19.9	146	1,302	1,409	1,574	11.7	132	£8.44	7.3	6.1
PLAICE FROZEN	7,482	7,474	6,936	-7.2	-28.83	995	1,007	893	-11.3	-35.10	£7.77	4.7	9.7
SOLE FROZEN	7,864	6,661	5,930	-11.0	26	746	575	482	-16.3	13	£12.31	6.3	11.5
LOBSTER FROZEN	535	1,870	5,190	177.5	280	31	96	270	181.6	238	£19.23	-1.5	12.8
SCALLOPS FROZEN	3,426	4,628	4,986	7.7	4	173	219	219	0.0	-25.26	£22.78	7.7	39.58
TUNA FROZEN	3,387	4,494	4,139	-7.9	-35.48	577	722	622	-13.8	-56	£6.65	6.9	45.02
SQUID (CALAMARI) FROZEN	2,029	2,811	3,232	15.0	38	183	278	395	42.4	12.54	£8.18	-19.2	22.9
SEA BASS FROZEN	1,534	1,224	2,385	94.8	-10	101	95	185	94.6	16	£12.89	0.1	-22.7
MUSSELS FROZEN	2,034	1,878	1,984	5.6	34	382	327	320	-2.0	25	£6.19	7.8	6.7

(Data: Nielsen Scantrack – 8yrs/52wks to 21.5.16)

The Seafood Shopper

For seafood the shopper is usually also the consumer, although, there are some disconnects around seafood products aimed at children, for example, coated fish shapes. Shopper misconceptions are at the heart of continued growth of chilled seafood and the decline of frozen seafood. Shoppers and consumers perceive chilled and frozen seafood very differently. Chilled seafood is seen as 'healthier', 'fresher', 'better tasting', 'higher quality' and 'easier to cook' than frozen; and is typically bought with a treat or special occasion in mind. Chilled seafood shoppers are generally more engaged and knowledgeable about seafood and the surrounding issues like sustainability. In comparison, frozen seafood is seen as a 'convenient' cupboard and shopping list staple; whilst shoppers comment on 'mushy texture' loss of flavour and struggle with the concept of how frozen seafood can still be 'fresh' and don't like not being able to see the product through the packaging. Many of these misconceptions or issues can be addressed through consumer education.

The Frozen Seafood Shopper Journey

Seafish recently commissioned Kantar to carry out two studies to determine why, how and where people buy seafood. Combined with previous Seafish shopper research and the Institute of Grocery Distribution

Some benefits of frozen seafood:

- Freezing seafood at sea locks in quality and flavor; if frozen and handled correctly raw whitefish can be re-frozen several times without detriment to either safety or texture.
- Frozen seafood is also highly convenient which results in less wastage; it can be cooked from frozen without safety issues.
- The often undervalued, fish pie mix, is ideal for more popular curries and stir fry's but is rarely marketed as such to the shopper.

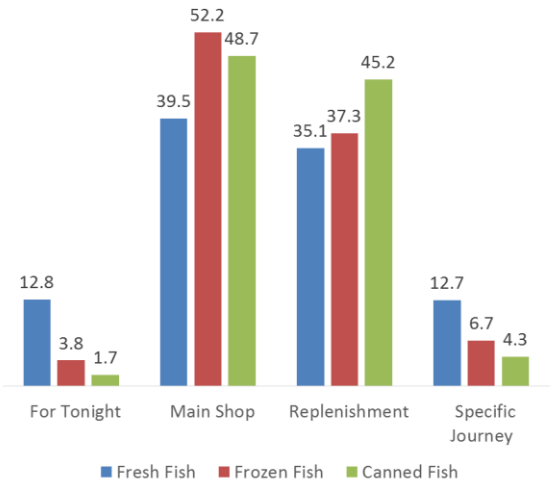
IGD benchmarking of the seafood shopper the insight, can be used to guide NPD, marketing and sales strategy. 2015 saw both brand and retailer campaigns focusing on high quality and luxury frozen food products, for example, in the past year frozen whole lobsters have been introduced to Asda and Morrisons' ranges. Frozen in general has seen positive momentum, in the past 12 months to July 2016, Waitrose, Ocado, Tesco have all significantly increased frozen SKU's, with Morrisons up 59.3% percent (Brandview). The post Brexit economic climate may be the catalyst that will reverse the decline of frozen seafood.

In general, frozen seafood shoppers are a little less engaged, viewing seafood as being less key in the diet. Frozen seafood shoppers claim to be less knowledgeable, have questions over quality and health and lack confidence around seafood. There are degrees of engagement, ranging from frozen breaded and battered shoppers who have minimal engagement, through to frozen natural shoppers who are a little more quality inclined, don't lack confidence and are willing to experiment to an extent with seafood. Nielsen has the frozen seafood shopper as younger and less affluent compared to then the average chilled fish shopper. The frozen shopper is predominantly C1/C2, with 2 or 3-4 household members. Frozen shoppers are typically aged over 45 but exhibit a higher proportion of 35-44 yr. old shoppers than chilled. Although predominantly adult only households, there are more likely to be children present than for chilled, typically in the age group of 5-10 years, families being established or maturing.

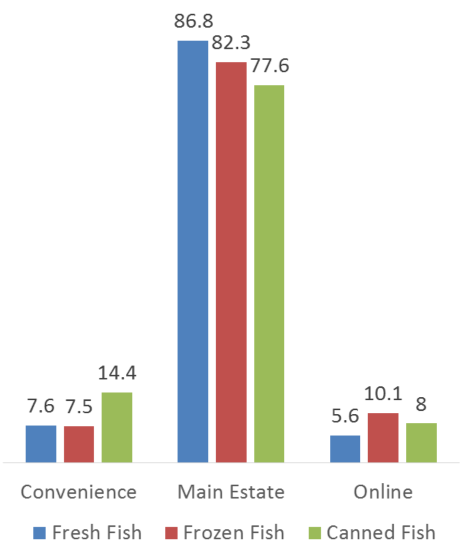
Frozen Shopper Missions

The Shopper 'Mission' is simply the reason for the shopping trip. The 'main shop' is the key mission for frozen seafood shoppers (52.2%), followed by top up shop (37.3%) with the purchase much more geared towards replenishment. The decision to buy usually made before going to store, rather than in fish section. Typically there is no immediate meal in mind and no other ingredients for the meal are bought at the same time. The opportunity is to position frozen as a quality, easy to cook, stocking versatile essential. It is important to speak to shoppers in the home before they draw up their shopping list as well as at fixture. The frozen seafood shopper is a little less likely to not look at or consider anything else, and if they do, it will really only be other frozen. Frozen also has more child orientated occasions than chilled, over indexing on the with Dinner/tea daypart. The opportunity is to innovate on child friendly formats and flavours, appealing to the health benefits over other proteins but also formats such as giant fish fingers which can stretch into more adult occasions. The key message is that frozen has all the quality, health and taste of chilled, but with the added benefit of convenience and can be cooked from frozen.

Shopper Missions by Seafood Sector 2015 (Value)



Channel by Seafood Sector 2016 (Value)



Kantar World Panel June 2016

Frozen Seafood Channels

In recent years there has been a shift away from main estate (supermarkets) to online, discounters and convenience. Tailoring a seafood product to the key mission and channel is key to growth. Main estate is the key channel for frozen seafood, selling 86% of frozen seafood by volume. Frozen also has a greater presence in online than chilled, as chilled shoppers prefer to choose their seafood themselves. Surprisingly, frozen seafood has a similar presence to chilled in convenience.

As main estate is the biggest part of the market, its fish reaches all age and gender groups, but has a small bias towards the over 55s.

HOW TO GROW THE FISH CATEGORY BY CHANNEL?

Online	Convenience	Main Estate
Target **family weekday evening meals** with **large formats** suitable for the whole family. Be part of **tasty, filling, healthy and practical meals** where you focus on **fish pies, pasta dishes** and link with **potatoes, chips, pies and ice cream.**	Target **small HHs with small formats** with a focus on the **weekend evening meals** . Aim to increase the value of the fish occasion **by providing products that are practical and healthy in one go**. Link with fish pies, baked potatoes, fresh veg and wine.	Accommodate with **a wide range of formats for all occasion sizes**. Focus on the evening meal and **communicate about the biggest fish needs; taste, quick/easy, filling and healthy**. Link with the biggest fish dishes and accompaniments.
Family packsizes and/or multibuy deals are vital to grow the trip spend in the online marketplace. Frozen, which trades well on line is generally promoted on price, however, online this is less of an issue.	Added value is largely the only area achieving sustained growth. Assisting retailers with innovation and current flavour trends will be vital to category growth.	Shoppers are exposed to many more areas within the main estate. Ensuring the fish gets its fair share of the shelf is important to offer variety…However, there is a still a growing market, even in main estates for added value.

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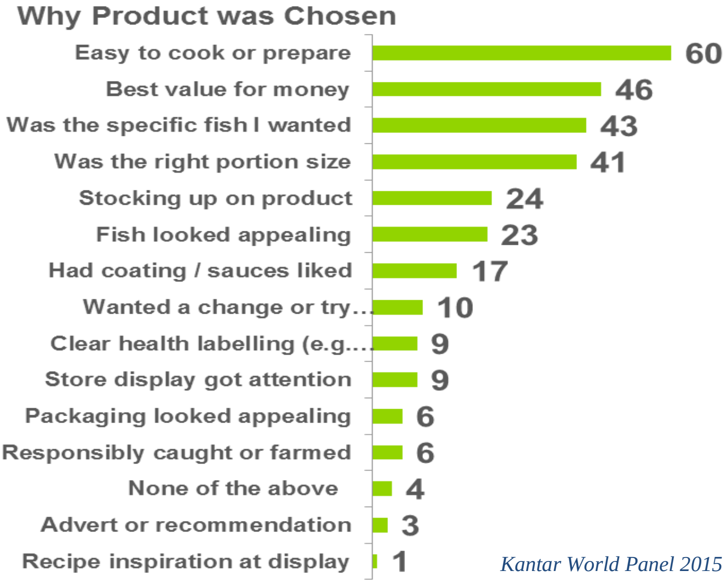
Frozen natural, added value and breaded and battered overtrade in the main estate channel. Frozen has declined heavily over the last 5 years in this channel with only frozen natural and added value in value growth over the past 5 years.

To be expected, the convenience channel over indexes in seafood that is ready to eat or ideal for 'meal for tonight' mission; only frozen battered and cakes/fingers are currently performing well in this channel. Convenience purchasing is heavily skewed towards less affluent, retired and smaller households. Evening meal is still the most important fish occasion, target 'Fish Fridays' and weekend evening meals. Use convenience's strength with the weekend to gain fair share of these occasions. To effectively target convenience fish occasions, communicate not only about health/convenience/practicality, but also focus on providing 'something different' with innovative flavours and formats. Online frozen especially overtrades in Cakes/Fingers, Natural and Added Value

Purchase

Shoppers typically find the frozen aisle 'dull' and 'cold' wanting to spend as little time as possible to shop. Organizing the fixture to be easy to navigate to help shoppers find the products they want quickly will pay dividends. The key to engaging frozen seafood shoppers is with products that offer ease of cooking, value for money, favorite species and portion sizes as well as preferred flavours/coatings. The future trend for polarization in household size towards in single households and larger households could be used steer pack size strategy, bearing in mind that frozen buyers are currently biased to larger households. Ensuring stock on shelf is important to retain the sale. Frozen natural shoppers are a little more swayed towards better quality and quicker preparation than average; they are also more to a guide to alternative species and preparation/recipe inspiration.

General Seafood Purchase Drivers 2015



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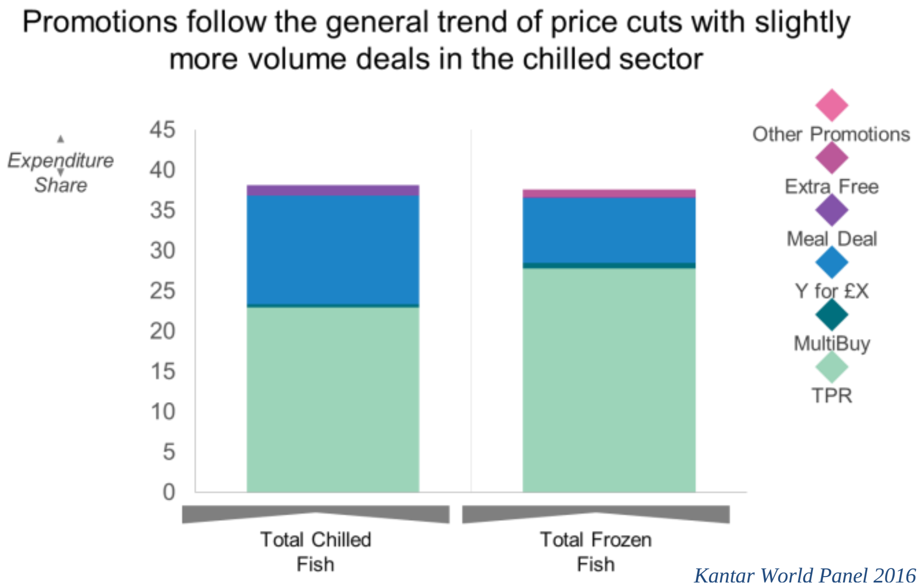
Key barriers to purchase at fixture are packs that do not let the shopper assess the appearance and portion size of the product. If the product is frozen at sea this should be made clear on pack. Seafood shoppers want more recipe inspiration at fixture.

Recently, the grocery landscape has been shifting to a position of simplicity. Number of SKUs at fixture being pared down to the core lines that perform well; and the complexity of the multitude of different types of promotions are being cut and simplified in favour of total price reduction (TPR). In 2015 the dominant frozen fish promotional mechanic was strongly TPR followed by Y for £x. There is opportunity for cross siting to include the items most commonly eaten with fish; which include frozen chips, peas, broccoli, carrots and wine.



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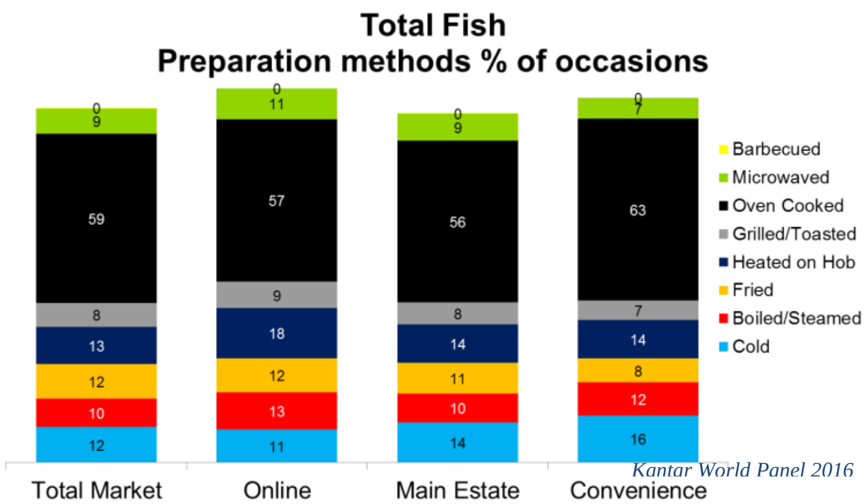
Eating

Frozen seafood is typically eaten at dinner/tea, the occasion being a touch more child orientated than chilled. Consumers report the eating experience offers less of a sweet, fresh flavour and does not feel healthy compared to chilled seafood, these responses are more biased to frozen breaded and battered. Frozen natural is marginally more dinner/tea, adult orientated and a healthy experience but concerns arise over repeat enjoyment and satisfaction. Frozen seafood occasions generally feature more vegetables and chips; as well as baked Beans. Frozen natural feature more vvegetables along with rice/pasta, with homemade sauces, stir fry/ curry/fish pie more likely. Meals are predominantly oven cooked, this could be used to steer NPD of both product and packaging.



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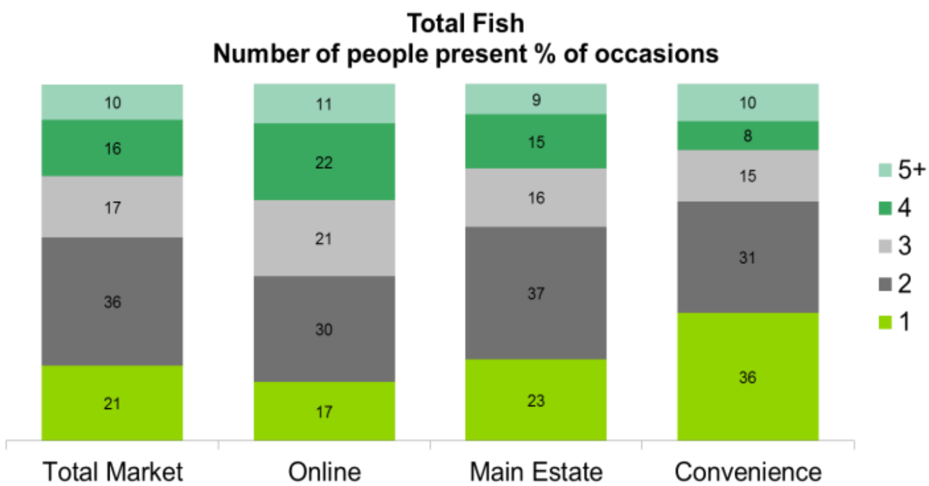

Successful frozen products will address the general seafood barriers of minimizing handling and preparation with maximum convenience. The most common barrier is unpleasant smell and overly fishy flavours, an indication of low quality. Key flavour trends in 2015 were Asian, American and south American flavours.

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THE DETAIL; FROZEN SHOPPER JOURNEY SUMMARY & RECOMMENDATIONS

	FISH FINGERS	BATTERED	BREADED	NATURAL	PRAWNS
MINDSET	Fish not key in diet, don't see benefit / quality, have on list or see as favourite; need wider education on virtues.	Hard to cook, not key in diet, don't see benefit, lack knowledge, price more key so again need education.	Relevant in diet, on the list, more of a favourite but cant explain benefit so wider need for more reason to buy	More engaged & see virtues of frozen, but wider need for species knowledge and push as favourite remains.	Engaged; sustainability origin & quality key but don't see frozen as fresh & ease of cook concern – tackle this
MISSION	Targeting around larger trips and positioning as a freezer essential as stock level in home drives purchasing.	Target big trips where stocking takes place for future meals but not "stock" driven so be more specific.	Target larger stocking trips around replenishment and also future meals – versatility and specific.	Target big trips where stocking takes place for future meals but not "stock" driven so be more specific.	Target quicker trips geared around specific meal occasions as need to talk directly to this reason to buy
INFLUENCE	Specific product (but not meal) is known in advance of shop so target shoppers pre-store around replenish.	Meal is in mind so need to target specific meals, but decisions being made in store too so target here.	Decision to buy prior to shop and in store but meal is in mind when purchased so degree of specificity needed.	Specific product known in advance of store so need to target shoppers pre-store & tighten up loose meal ideas.	Specific product and meal known in advance of store so must target reasons to buy pre store around dishes.
AT FIXTURE	Little consideration of other products so must target in advance, & concerns around "appealing" to review?	Will clearly be considering other products so need to speak to them directly here to help with the decision.	Will definitely be considering other products so in store relevance still required, as well as pre-store targeting.	A positive shopping experience but may still be swayed at fixture so in store noise can still play a role.	Wont consider other frozen but perhaps chilled to a degree so virtues of frozen must be addressed.
DRIVERS	Value an average concern but stocking more key so further target versatility, while health claims key too.	Value for money is the key driver along with preferred coatings so these need to be utilised in targeting too.	Stocking a key driver so play to this along with ease of cook, ideal size and preferred coatings.	Drivers to tap into via messaging; ease of cook, value for money & ideal size linked to stock message	Value and product specificity are key drivers, so further highlighting need to target shopper pre store
CONSUMPTION	Play to versatility via multi occasion, person and ingredient potential, but review flavour and health.	The quintessential fish and chips should lead targeting but scope to review enjoyment, flavour & health.	Target adult dinner meal occasions dialling up ease, enjoyment and flavour, but address health concern.	Target adult dinner occasions, ingredient use can play into future stock concept and tap into health.	Target Adult special occasion including use as ingredient tapping into ease, enjoyment, taste & health.
TRIGGERS	Price more a factor further showing need to play to value for money credentials but lack ideas generally too.	Generally want better quality which could feed into this review, also inspiration on prep so offer twists & ideas.	Desire for more quality, quicker prep, freshness and health info should all be addressed via above plan.	Desire more variety, species guide and quicker prep ideas which could all feed into future meal stock plan.	Price & quality competing factors, so address this in plan positioning frozen as meeting both requirements.
10% +1 PURCHASE	£2.8M	£3.2M	£3.0M	£3.4M	£3.3M

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OVERVIEW; FROZEN SHOPPER JOURNEY RECOMMENDATIONS

MINDSET

Frozen shoppers less engaged – fish less key in diet, benefits not as easily seen and quality not as key. Scope to educate around benefits, positioning category as more of a shopping list staple and favourite while addressing the worth of quality over price to improve perception of taste and "special."

SECTOR SPECIFIC JOURNEY

Fish Fingers – even wider need for education on virtues here. Must target shoppers pre-store around idea of "Freezer essential" multi occasion versatility, with potential to review flavour & health concerns. **£2.8M**

Battered – again a need for wider education. Must target a little more in store, and with greater focus on specific meal occasion stocking – Fish and Chips will be key – while value is important offering scope for cross promotion which could also be utilised in desire for more inspiration and twists too? **£3.2M**

Breaded – relevant within diet but still not clear on benefits so need more valid reasons to buy. Scope to target as a "versatile replenish essential" pre store and in store, targeting adult evening meal, tapping into ease of cook, ideal size, enjoyment and flavour with potential to additionally address health concerns. **£3.0M**

Natural – more engaged so "advanced" education a little more relevant (potentially around species knowledge). Need to target shoppers pre-store and tighten up current loose meal concepts by targeting future stock for adult evening meal via varied ingredient/dish use tapping into ease of cook, value for money and health credentials. **£3.4M**

Prawns – well engaged, but tackle issue of Frozen (and quality/fresh) perception. Must target pre store around specific and "special" meals and dishes dialling up adult enjoyment, ease, taste and health with frozen capable of meeting value and quality expectations. **£3.3M**

TRIGGERS

Broader education should also be related back to the most popular stated triggers of wanting quality and variety, as well as guidance on new & quick ideas. Quality & variety used to drive taste and "special," with ideas/solutions addressing the benefits available by making Fish a shopping list staple.

Data:

- 2016 Retail data (AC Nielsen Scantrack/Homescan: 52 weeks to May 21st (Scantrack excludes discounters and seafood sandwiches - Homescan excludes seafood sandwiches) (%) values represent change from the previous year unless otherwise stated
- Kantar World Panel Seafood Shopper Journey Report 2015
- Kantar World Panel Seafood Channel Report 2016
- Defra Family Food Survey

Further Reading –

- Seafish Factsheet: Chilled Seafood in Multiple Retail 2016
- Seafish Factsheet : Seafish Seafood Consumption Fact Sheet 2015
- Seafish Factsheet: Cod 2016
- Seafish Factsheet: Haddock Industry 2015
- Seafish Factsheet: Prawn and Shrimp Industry 2015
- Seafish Factsheet: Tuna Industry 2014

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