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SEAFOOD IS THE WAY FORWARD
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Market Insight

- Seafood consumption
- Marketing
- Supply
- Retail
- Foodservice
- Q&As

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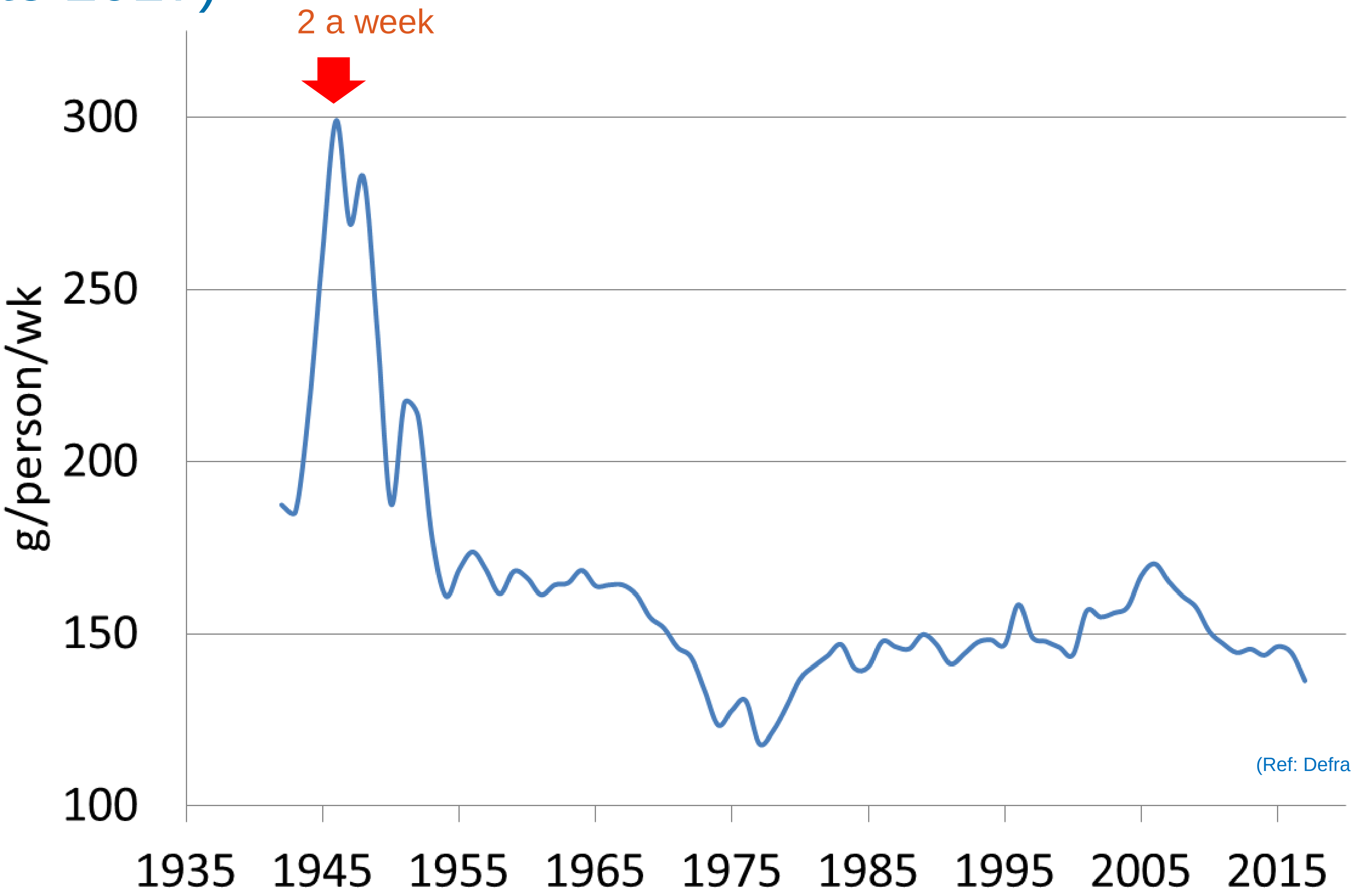
Our seafood consumption challenge

- Consumer tastes, meals and diets are changing
  - Vegan, vegetarianism, pescatarianism, flexitarianism
  - Consumers intend to eat less meat in future
- Key drivers: health, ‘responsibility’, animal welfare
- We have more food choices than ever before; protein innovation
- Ageing population vs younger generations wanting something different
- Seafood is the first ‘traditional’ protein to be affected when general food bills increase
- Where does this leave seafood consumption?

Long term consumption of seafood (to 2017)



(Ref: Defra Family Food)

Where are we now?

	2015	2016	2017
Total quantity of seafood (grams per person / week)	161.07g	159.06g	150.54g
Number of portions per person / week (140g)	1.15	1.14	1.08

5.4%

General seafood consumer barriers / misconceptions

Confusion
- Provenance
- Sustainability
- Catch method
- Seasonality

Choosing
- Smell
- VfM / £kg
- Confused / not convenient
- Eyes/Scales
- Waste

Cooking
- Smell
- Difficult to know when cooked
- Confused about ‘how to’
- Food poisoning fears
- Stick to what they know

Eating
- Smell
- Fear of bones
- Eyes / scales
- Taste – it’s ‘fishy’?
- Texture

Our seafood consumption industry challenge

- We need to ensure seafood is;
  - Easy / simple / versatile
  - Builds on healthy / health benefits / meat free diets / a responsible and ethical protein of choice
  - Offers good value for money
  - Appealing to younger generations
  - Retaining loyal older generations
  - Seen as an everyday choice
  - The right product in the right place

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Seafood Advocacy and Promotion in the UK

The 'Net to Plate' Story
Mike Warner

Mike Warner
Seafood Writer & Consultant

- Seafood advocacy and storytelling
- Guild of Food Writers
- Blog - ‘A Passion for Seafood’
- Seafish Ambassador
- Talks, demos, food theatre, recipe writing
- Chef, media and educational visits
- Patronage and brand ambassadorship

Why British Seafood?

- Seafood consumption remains in decline.
- 80% UK landings exported
- 85% shellfish exported
- 70% consumption imported
- Seafood ‘commoditised’ - lost the culture of our neighbours
- The great British seafood paradox
- Sustainable, traceable, seasonal

The Shellfish Association of Great Britain

Shellfish Promotion Project

September 2017-
September 2019


OZ 20
1 pint.
18
16

EMFF - funded 2 year project to increase shellfish consumption in the UK

- Identify ‘Key Influencers’
- Target mainly exported and underused species
- Promote UK aquaculture
- Focus on nutrition and dietary health
- Education
- Food service, catering hospitality
- Media

Cornish Langoustines - a brand new product for the UK hospitality sector

- Exclusively exported to Spain and Italy
- Frozen at sea (FAS)
- Seasonally fished - year round availability
- Quality product - creel caught flavour and texture - half the price
- Chefs product - Mitch Tonks

Billingsgate Seafood School

- Developed a close working relationship
- CJ Jackson - demo partner
- Sustain events
- Educational workshops
- Food service engagement

Cornish Hake

Promoting the new ‘Cod’

Four days aboard the Hake Netter ‘Ajax’ fishing for MSC hake West of the Scillies

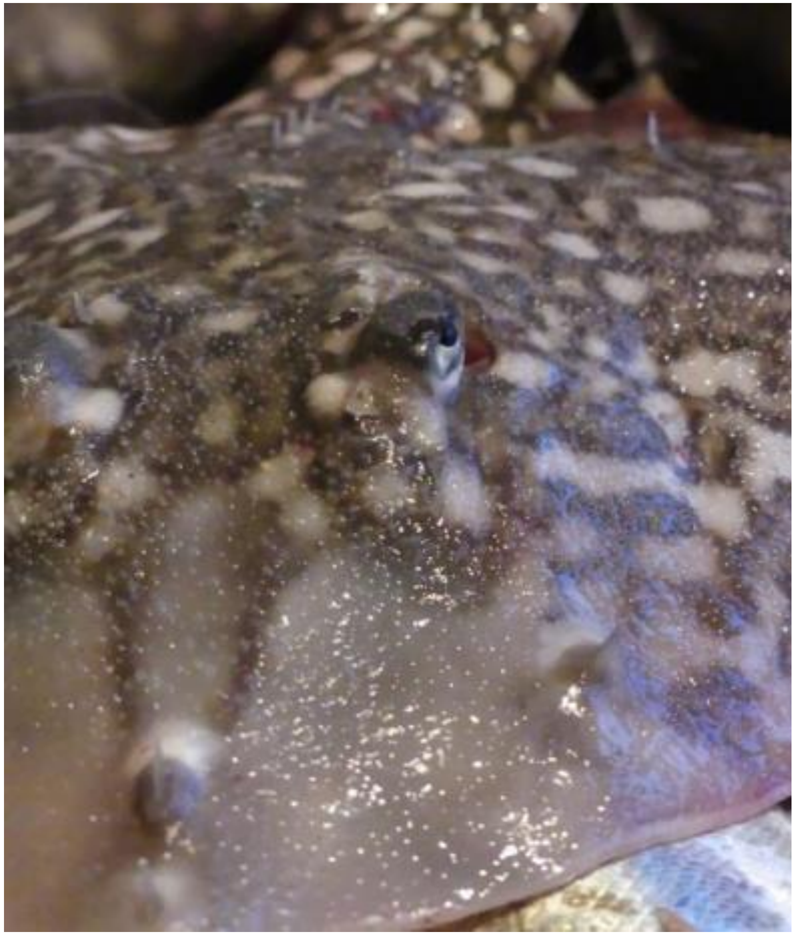
Country Life magazine

Herring - the lost staple

- Working with inshore U10m fishermen on Suffolk Coast
- Opportunity starvation
- 10t/month herring TAC
- No market
- In talks with Cornish and Welsh fishermen.
- Potential for quota swaps

‘Local Sustainability’

- Some species on ‘red list’ even though locally and seasonally abundant
- Seasonal catch opportunities - adding value
- Artisan fishermen denied market access.
- Lack of prosperity
- Direct impact on local community socio-economics
- Heritage and history
- Tourism



Promoting Aquaculture

- Fowey Shellfish - organic mussels
- Loch Fyne Sea Farms - farmed Queenies
- Flo-gro sustainble British prawns
- Working closely with National Lobster Hatchery

The Welsh Seafood Cluster

Working as a business mentor and consultant to Welsh seafood businesses to increase domestic opportunity and create product branding

Seafish Ambassador

- Food festivals
- Cookery/prep demos/recipes
- Seafood talks/lectures
- Podcasts
- Video content
- Linking the fishing industry to the consumer.

The National Fish & Chip Awards

New category for 2019 - Seasonal UK Seafood Award.

Celebrating seasonal British fish and shellfish

Charitable Work

- National Lobster Hatchery - Patron
- Fishing into the Future - Trustee
- Newlyn Harbour Commissioners - Advisory member
- Eastern IFCA - Board Member
- Fishermens’ Mission - supporter

“When it comes to eating seafood, we’ve lost our Grandparents’ nerve…”

– *Keith Floyd - Floyd on Fish 1984*

“Seafood promotion in the UK requires more than just social media. We need to work from the bottom-up and re-connect the consumer to the product……”

Mike Warner 2019

Thank you.

Questions?

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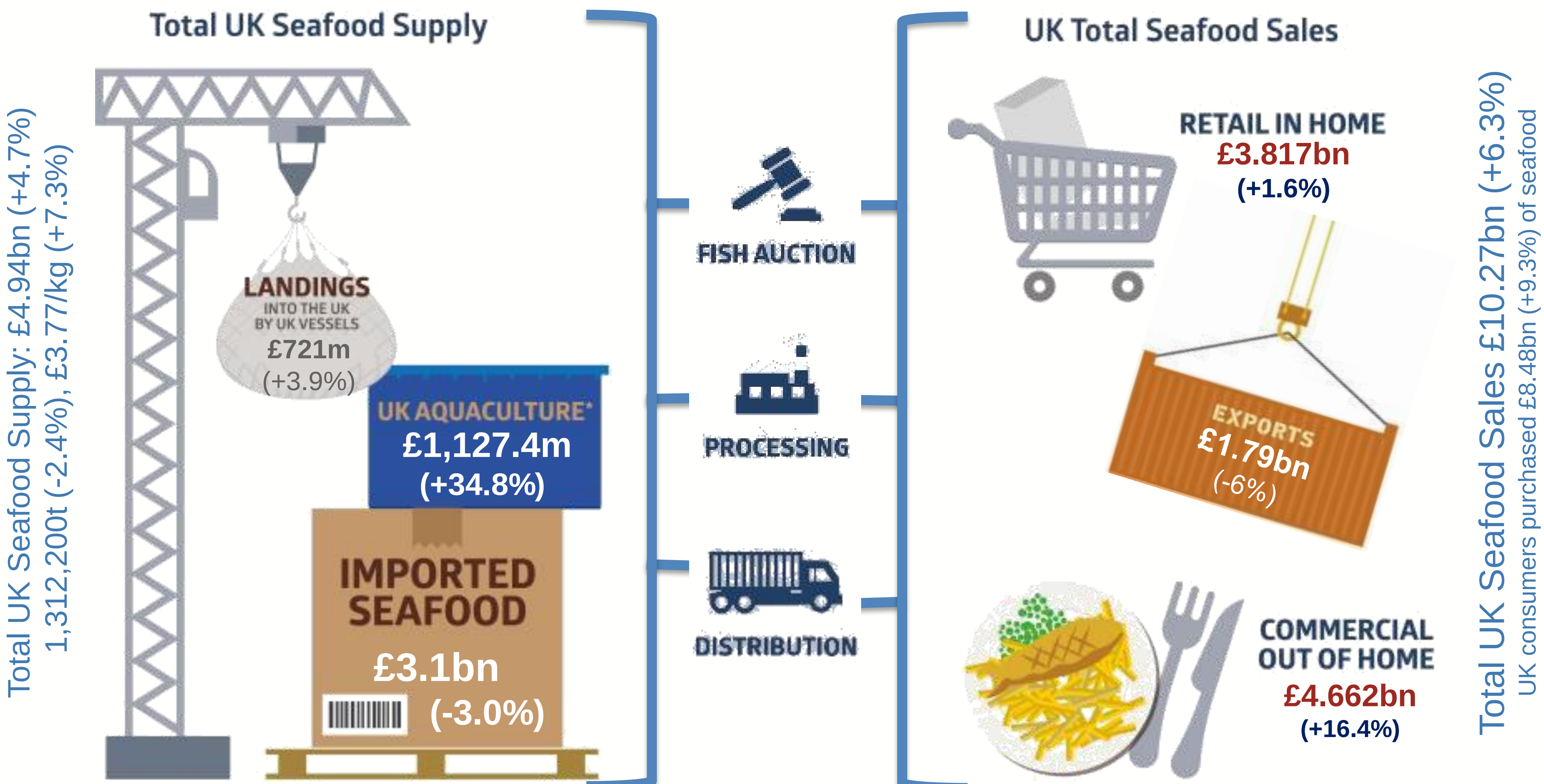
UK seafood value chain 2018



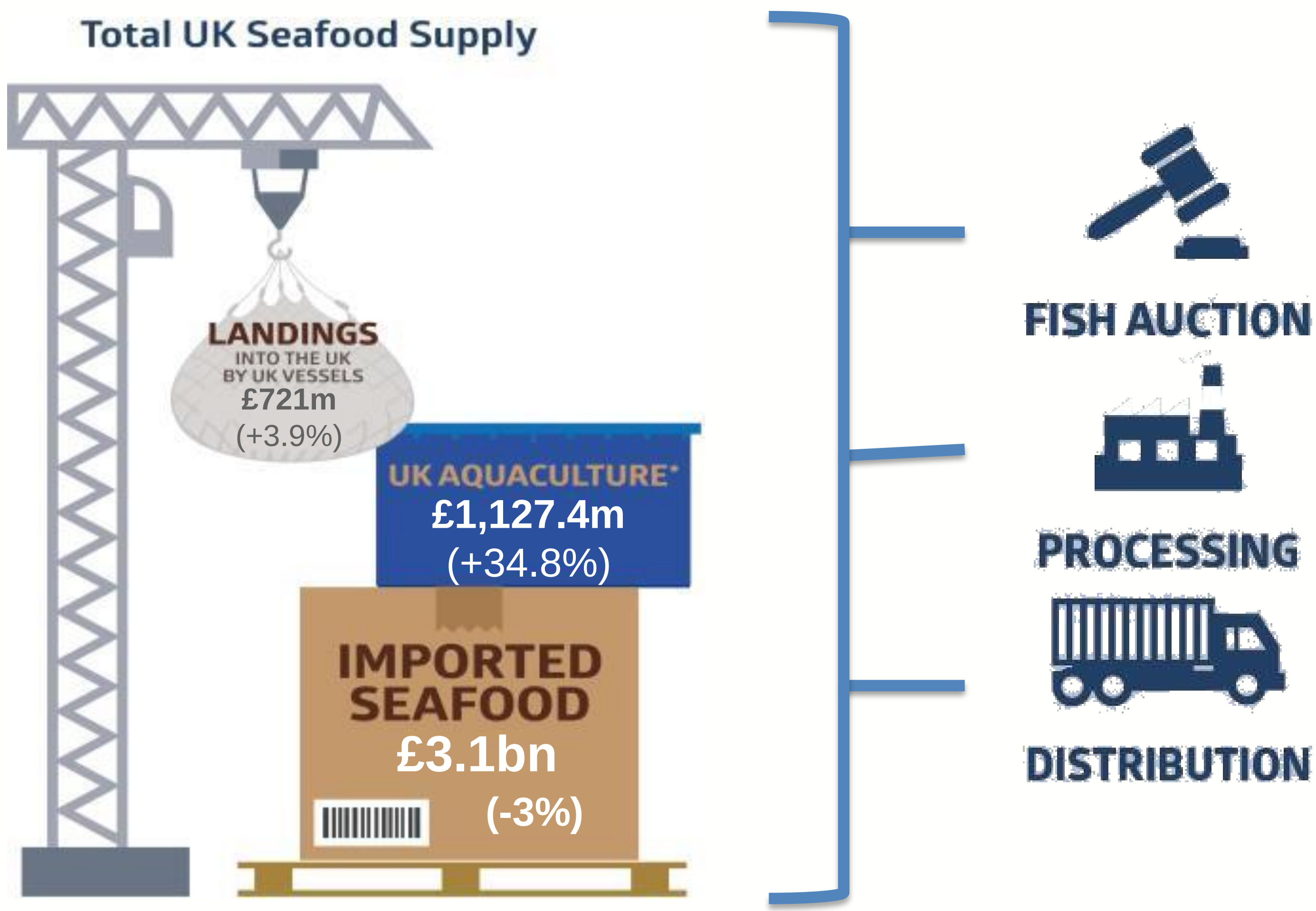
Source: HMRC via BTS Dec'18, MMO UK Sea Fisheries Statistics 2017, Cefas data for 2017, Nielsen ScanTrack GB Total Coverage including Discounters and Northern Ireland including Musgraves 29.12.18, The NPD Group/CREST® YE December '18

UK supply & imports
Exports

Total UK seafood supply: £4.94bn

(+4.7%)

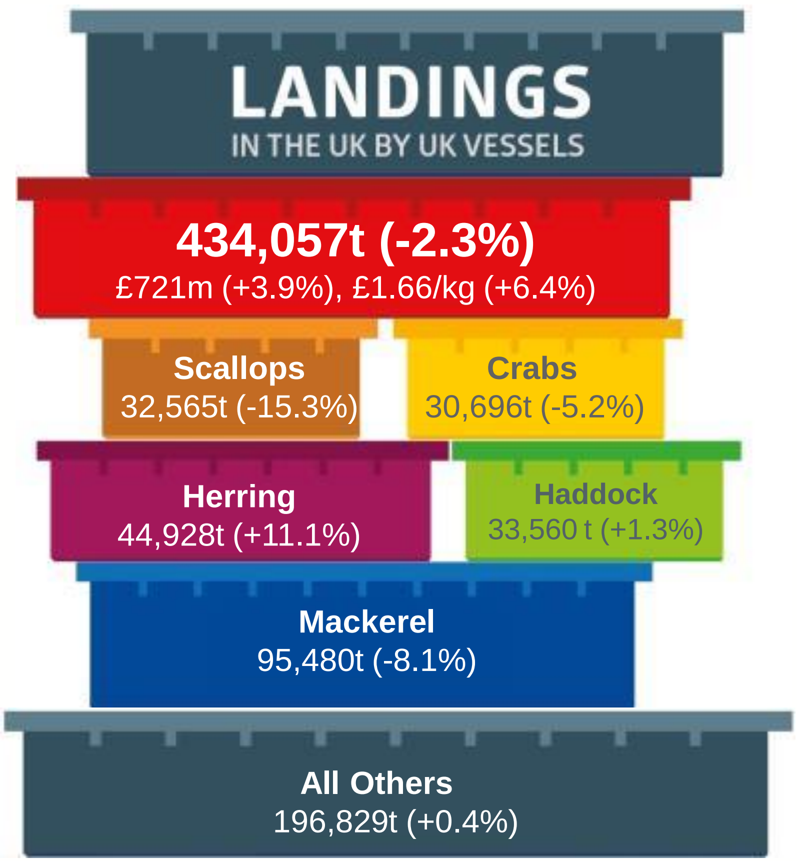
1,312,200t (-2.4%), £3.77/kg (+7.3%)

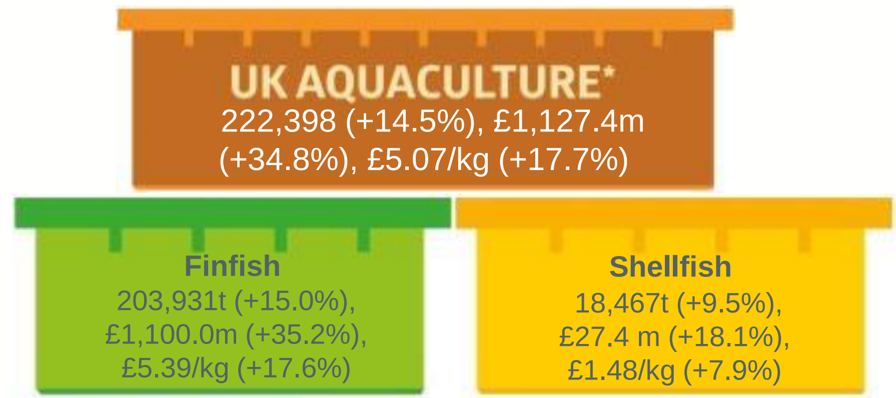


Source: HMRC via BTS Dec'18, MMO UK Sea Fisheries Statistics 2017, *Cefas data for 2015

UK source: £1.85m (+20.8%)

656,455t (+2.8%), £2.82/kg (+17.5%)





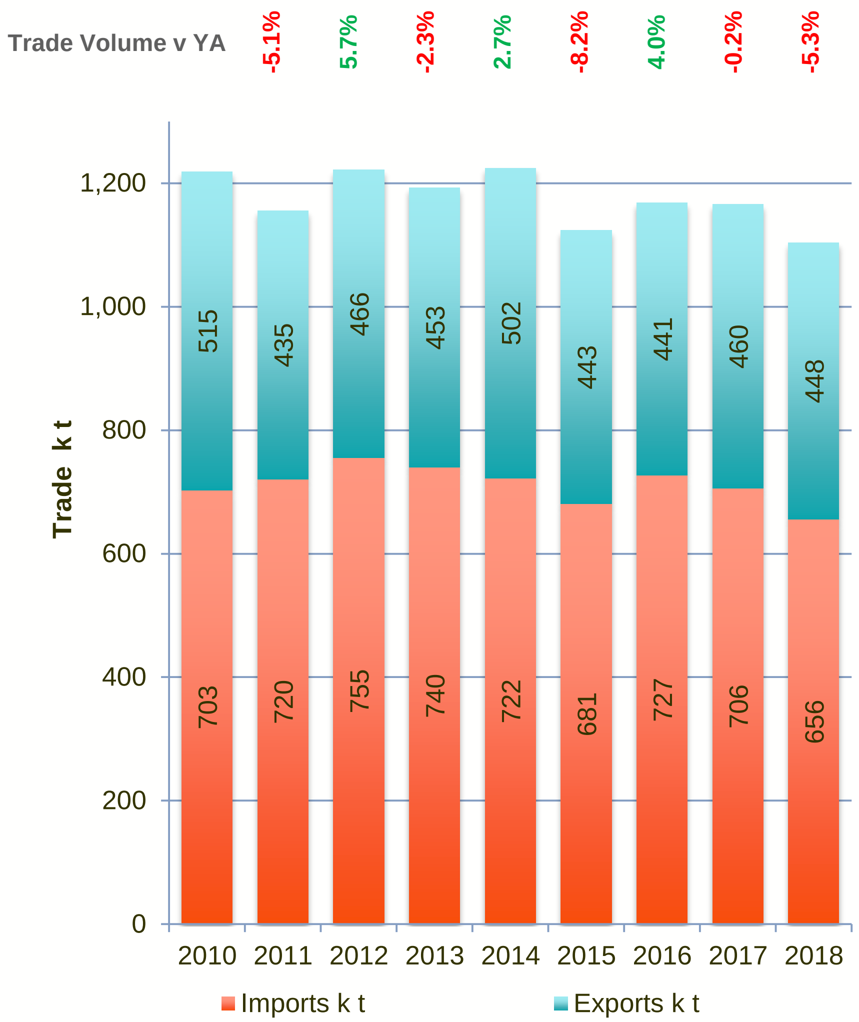
Source: MMO UK Sea Fisheries Statistics 2017, *Cefas data for 2017

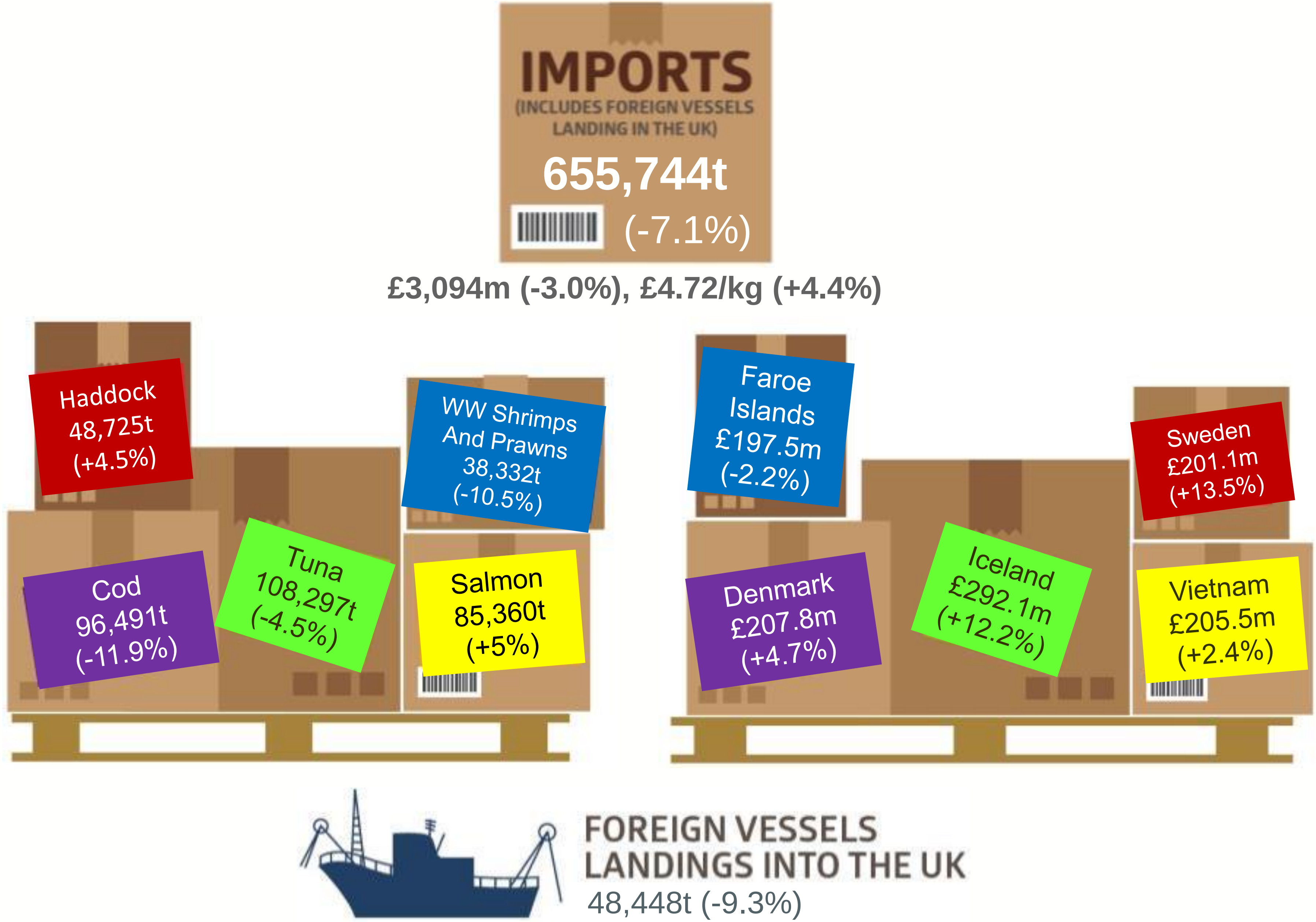
Total UK seafood trade overview

- The UK's total seafood trade has decreased in 2018 in terms of value and volume whilst the average £/kg has continued to rise.
  - £4,885m (-4.1%), 1,104k t (-5.3%), £4.43/kg (+1.3%)
- Seafood import value has decreased in spite of rising £/kg, as volume has declined more:
  - £3,094m (-3.0%), 656k t (-7.1%), £4.72/kg (+4.4%)
- Seafood exports have fallen across all measures:
  - £1,791m (-6.0%), 448k t (-2.7%), £4.00/kg (-3.5%)
- With this changing performance imports' share of value trade has increased to 63.3%, but share of trade volume decreased to 59.4%

Share of trade	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**
Trade Value £m	**£3,590**	**£4,019**	**£3,916**	**£4,220**	**£4,305**	**£4,010**	**£4,711**	**£5,095**	**£4,885**
Import	62.7%	63.7%	65.7%	65.3%	63.6%	66.6%	65.2%	62.6%	63.3%
Exports	37.3%	36.3%	34.3%	34.7%	36.4%	33.4%	34.8%	37.4%	36.7%
Trade Volume k t	**1,218**	**1,155**	**1,221**	**1,193**	**1,224**	**1,123**	**1,168**	**1,166**	**1,104**
Import	57.7%	62.3%	61.8%	62.0%	59.0%	60.6%	62.2%	60.5%	59.4%
Exports	42.3%	37.7%	38.2%	38.0%	41.0%	39.4%	37.8%	39.5%	40.6%
£/kg	**£2.95**	**£3.48**	**£3.21**	**£3.54**	**£3.52**	**£3.57**	**£4.03**	**£4.37**	**£4.43**

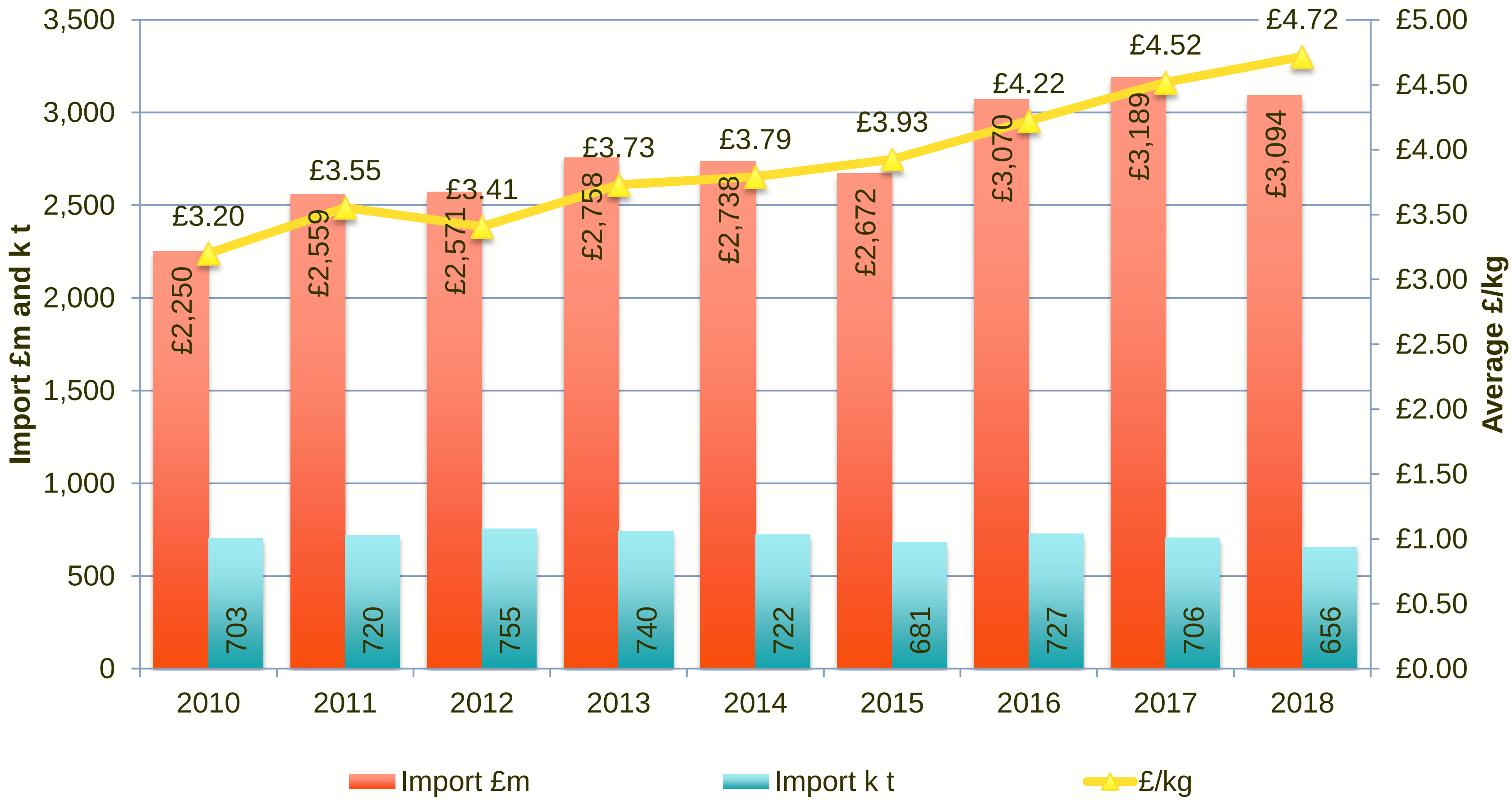
Total UK seafood trade summary





Source: HMRC via BTS Dec'18, : MMO UK Sea Fisheries Statistics 2017

Total seafood imports into the UK



% Change v YA	2011	2012	2013	2014	2015	2016	2017	2018
Value £m	13.7%	0.5%	7.3%	-0.7%	-2.4%	14.9%	3.9%	-3.0%
Volume t	2.5%	4.8%	-2.0%	-2.4%	-5.8%	6.8%	-3.0%	-7.1%
£/kg	11.0%	-4.1%	9.5%	1.7%	3.5%	7.6%	7.1%	4.4%

Top 20 countries importing seafood into the UK

	2018				% Change from 2017		
	Value Rank	Value £m	Volume k t	£/kg	Value £m	Volume k t	£/kg
Iceland	1	£292.1	58.6	£4.98	12.2%	10.8%	1.3%
Denmark	2	£207.8	42.5	£4.89	4.7%	0.3%	4.4%
Vietnam	3	£205.5	34.8	£5.91	2.4%	-1.3%	3.7%
Sweden	4	£201.1	35.6	£5.64	13.5%	4.7%	8.4%
Faroe Islands	5	£197.5	34.1	£5.80	-2.2%	-4.1%	2.0%
China	6	£191.5	59.8	£3.20	-10.1%	-10.8%	0.8%
Germany	7	£186.9	49.1	£3.80	-4.9%	-2.5%	-2.5%
Netherlands	8	£125.7	24.4	£5.14	6.1%	-18.3%	29.8%
Norway	9	£113.7	31.2	£3.65	7.7%	-9.3%	18.8%
India	10	£103.7	16.9	£6.12	-23.9%	-16.5%	-8.9%
Canada	11	£90.0	10.3	£8.74	-17.3%	-22.7%	6.9%
Poland	12	£87.6	18.2	£4.81	0.1%	-6.8%	7.3%
Ecuador	13	£78.5	19.0	£4.13	6.5%	2.3%	4.1%
Spain	14	£75.0	13.2	£5.66	-9.2%	-17.6%	10.2%
France	15	£69.0	10.3	£6.67	-3.1%	9.7%	-11.7%
U.S.A.	16	£67.2	13.5	£4.99	-20.2%	-20.7%	0.6%
Seychelles	17	£65.0	15.9	£4.09	8.6%	-12.2%	23.6%
Mauritius	18	£59.5	16.0	£3.71	13.9%	7.5%	6.0%
Philippines	19	£57.3	15.5	£3.70	38.2%	22.6%	12.7%
Russia	20	£56.5	13.4	£4.23	-5.9%	-12.7%	7.8%
All Others		£562.7	123.2	£4.57	-14.6%	-17.0%	2.9%
Grand Total		**£3,093.6**	**655.7**	**£4.72**	**-3.0%**	**-7.1%**	**4.4%**

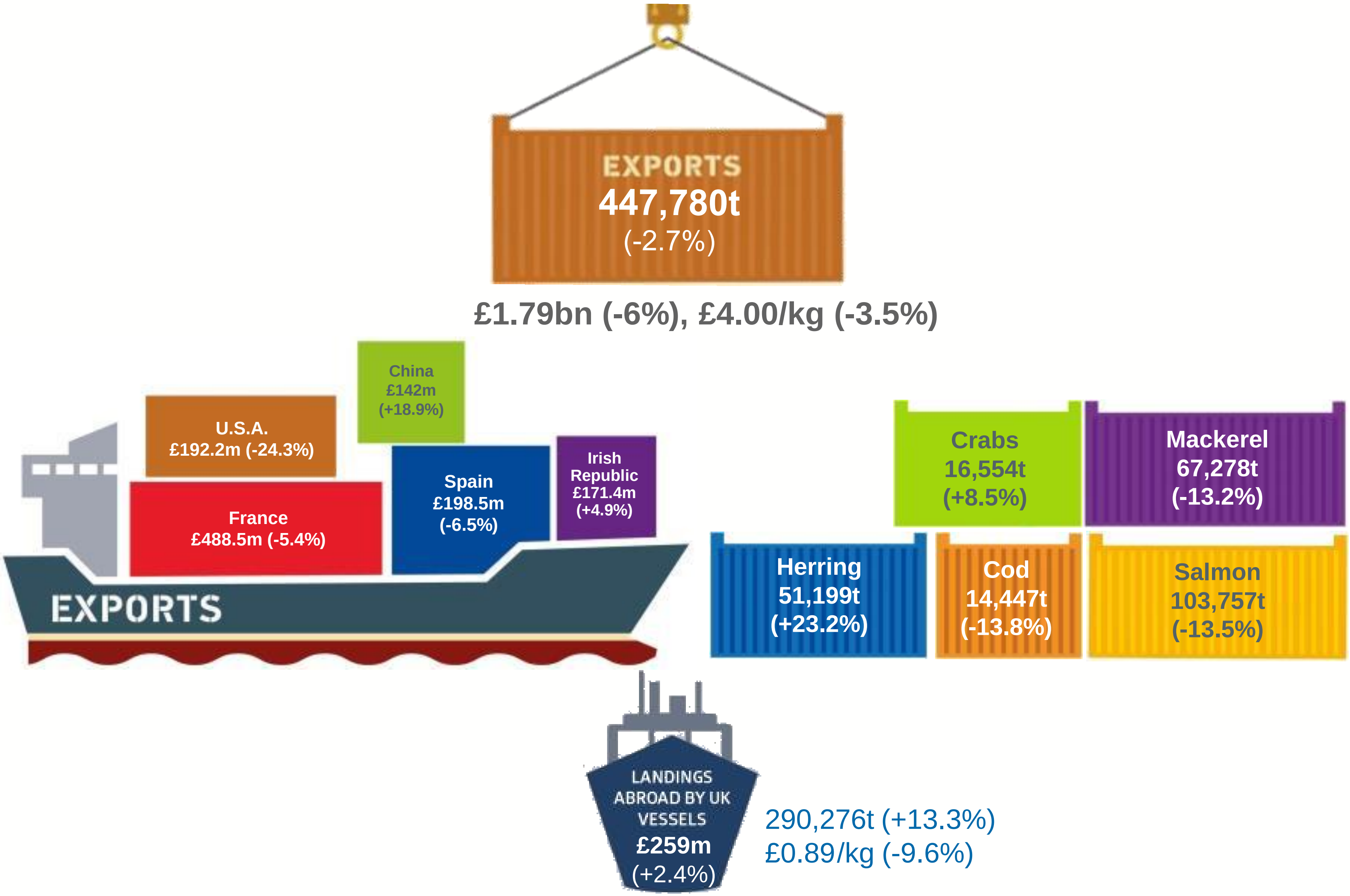
Key: value & volume increase, value & volume decline

Top species imported into the UK

	2018				% Change		
	Value Rank	Value £m	Volume k t	£/kg	Value £m	Volume k t	£/kg
Salmon	1	£578.5	85.4	£6.78	6.3%	5.0%	1.3%
Cod	2	£463.2	96.5	£4.80	-5.5%	-11.9%	7.4%
Tuna	3	£433.3	108.3	£4.00	1.7%	-4.5%	6.5%
WW Shrimps And Prawns	4	£295.9	38.3	£7.72	-18.5%	-10.5%	-8.9%
P&P Shrimps & Prawns	5	£286.8	34.8	£8.24	-7.9%	-5.8%	-2.3%
Haddock	6	£154.9	48.7	£3.18	20.3%	4.5%	15.1%
Pollack	7	£72.5	33.6	£2.16	9.5%	8.2%	1.2%
Mackerel	8	£40.7	14.0	£2.90	-28.5%	-55.2%	59.8%
Lobster	9	£30.2	2.0	£15.38	-5.3%	-9.5%	4.6%
CW Shrimps & Prawns	10	£24.6	3.5	£6.95	40.7%	70.8%	-17.6%
Crabs	11	£23.1	3.8	£6.03	15.4%	34.7%	-14.3%
Scallops	12	£21.0	1.3	£15.66	0.8%	-2.5%	3.3%
Plaice	13	£13.2	3.3	£3.95	-13.1%	-25.6%	16.7%
Nephrops	14	£11.9	2.6	£4.55	19.0%	2.0%	16.6%
Herring	15	£10.6	4.5	£2.37	-20.2%	-36.3%	25.1%
Coley	16	£7.7	2.6	£2.93	5.9%	-1.3%	7.3%
Monkfish	17	£5.5	1.5	£3.72	-14.4%	-18.3%	4.8%
All Others		£620.1	£170.9	£3.63	-6.1%	-7.8%	1.9%
Grand Total		**£3,093.6**	**£655.7**	**£4.72**	**-3.0%**	**-7.1%**	**4.4%**

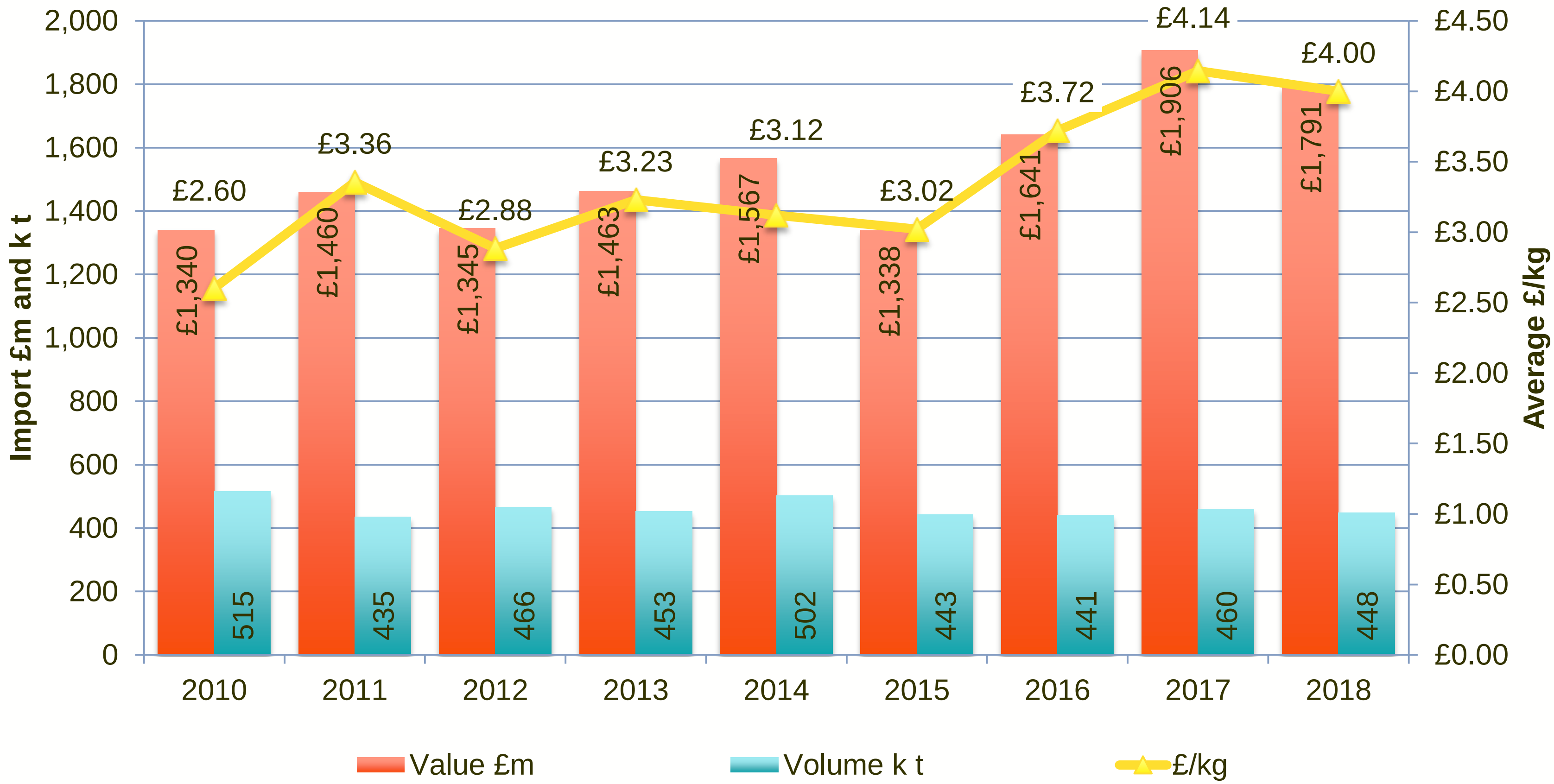
Key: value & volume increase, value & volume decline

Exports



Source: HMRC via BTS Dec'18, MMO UK Sea Fisheries Statistics 2017

Total seafood exports from the UK



% Change v YA	2011	2012	2013	2014	2015	2016	2017	2018
Value £m	8.9%	-7.9%	8.7%	7.1%	-14.6%	22.7%	16.2%	-6.0%
Volume k t	-15.5%	7.2%	-2.9%	10.9%	-11.8%	-0.4%	4.3%	-2.7%
£/kg	29.0%	-14.1%	12.0%	-3.4%	-3.1%	23.1%	11.4%	-3.5%

Top 20 seafood export destinations from the UK

	2018				% Change		
	Value Rank	Value £m	Volume k t	£/kg	Value £m	Volume k t	£/kg
France	1	£488.5	78.3	£6.24	-5.4%	-12.4%	7.9%
Spain	2	£198.5	42.2	£4.70	-6.5%	-5.2%	-1.3%
U.S.A.	3	£192.2	26.6	£7.23	-24.3%	-25.4%	1.4%
Irish Republic	4	£171.4	52.2	£3.28	4.9%	39.8%	-24.9%
China	5	£142.0	24.6	£5.78	18.9%	11.3%	6.8%
Italy	6	£109.3	18.0	£6.08	-9.0%	1.8%	-10.6%
Netherlands	7	£81.4	64.1	£1.27	-4.7%	-5.6%	0.9%
Germany	8	£61.8	18.6	£3.33	-6.3%	16.4%	-19.5%
Denmark	9	£41.2	23.3	£1.77	-4.3%	-7.2%	3.1%
South Korea	10	£36.8	4.2	£8.78	-2.8%	-7.8%	5.4%
Belgium	11	£30.1	4.0	£7.42	-2.7%	-9.9%	8.0%
Taiwan	12	£27.1	4.5	£6.09	46.9%	30.3%	12.7%
Poland	13	£24.5	10.6	£2.31	-7.0%	10.9%	-16.2%
Portugal	14	£13.9	3.9	£3.53	15.1%	8.0%	6.5%
Vietnam	15	£13.6	8.1	£1.67	-37.8%	-1.4%	-36.9%
Hong Kong	16	£12.7	1.3	£9.46	0.6%	-14.4%	17.5%
Japan	17	£10.1	2.8	£3.53	44.5%	147.7%	-41.7%
Canada	18	£9.4	1.4	£6.64	-38.3%	-51.0%	25.8%
United Arab Emirates	19	£7.9	1.0	£8.25	-23.8%	-13.3%	-12.2%
Lithuania	20	£7.2	5.2	£1.37	147.2%	188.5%	-14.3%
All Others		£111.8	52.8	£2.12	-14.7%	-14.9%	0.3%
Grand Total		**£1,791.2**	**447.8**	**£4.00**	**-6.0%**	**-2.7%**	**-3.5%**

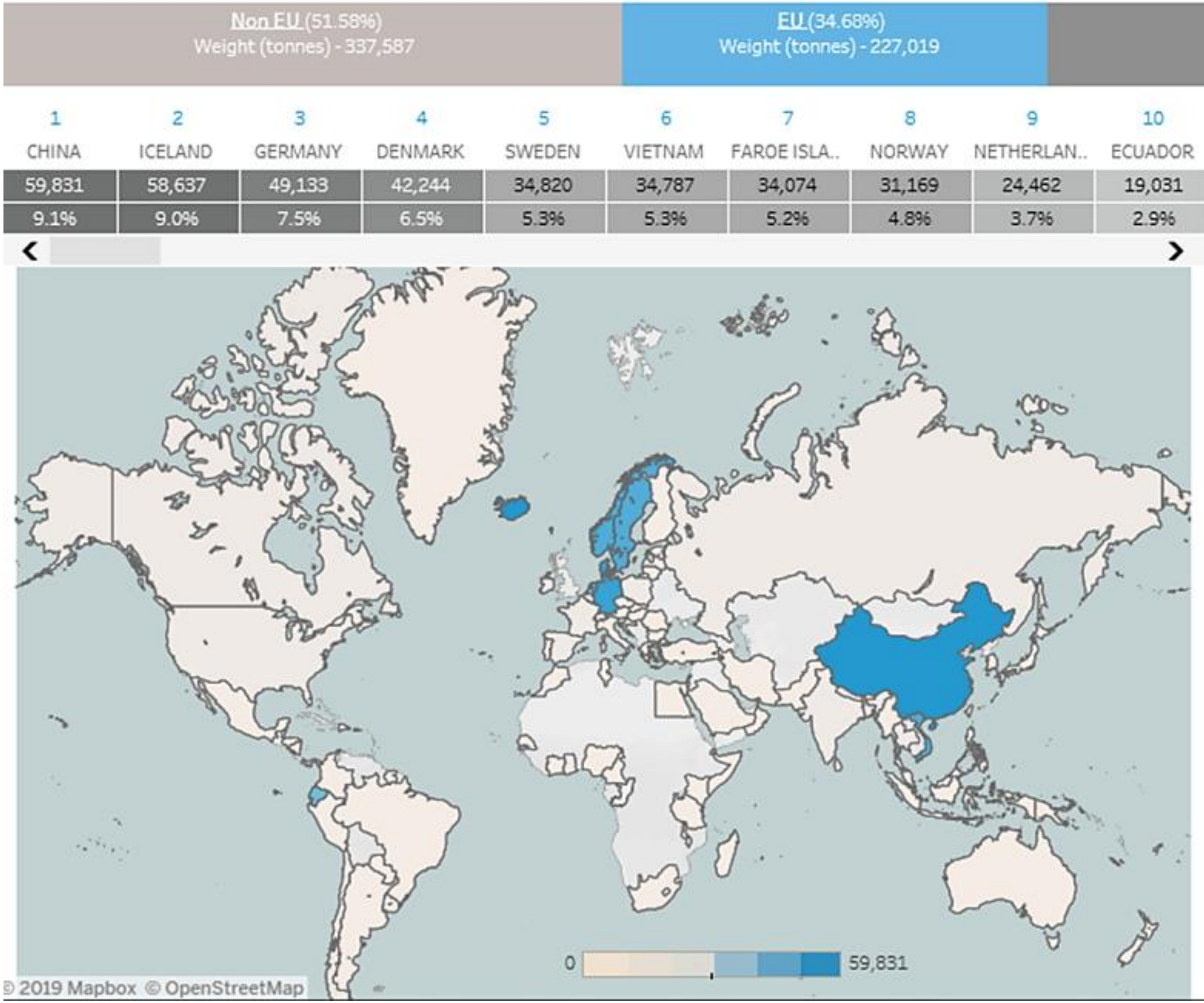
Key: value & volume increase, value & volume decline

Top species exported from the UK

	2018				% Change		
	Value Rank	Value £m	Volume k t	£/kg	Value £m	Volume k t	£/kg
Salmon	1	£661.3	103.8	£6.37	-11.1%	-13.5%	2.8%
Nephrops	2	£107.9	12.9	£8.34	-9.9%	-3.0%	-7.1%
Crabs	3	£99.6	16.6	£6.02	38.8%	8.5%	27.9%
Scallops	4	£90.0	7.6	£11.78	-12.4%	-8.4%	-4.3%
Mackerel	5	£81.0	67.3	£1.20	-7.3%	-13.2%	6.9%
Cod	6	£58.7	14.4	£4.06	-7.4%	-13.8%	7.5%
WW Shrimps And Prawns	7	£57.7	7.8	£7.43	-13.5%	-7.1%	-6.9%
Lobster	8	£40.6	2.2	£18.12	-6.6%	-16.9%	12.4%
Herring	9	£34.2	51.2	£0.67	-8.2%	23.2%	-25.5%
Monkfish	10	£31.2	4.1	£7.57	-3.2%	-15.5%	14.6%
Tuna	11	£25.6	8.2	£3.12	27.8%	70.6%	-25.1%
P&P Shrimps & Prawns	12	£23.1	3.6	£6.36	-7.1%	-3.3%	-4.0%
Coley	13	£14.1	6.7	£2.10	4.0%	22.2%	-14.8%
Pollack	14	£8.5	2.4	£3.52	22.3%	16.9%	4.7%
CW Shrimps & Prawns	15	£8.1	1.8	£4.53	-46.5%	-16.5%	-35.9%
Plaice	16	£5.2	2.2	£2.42	74.4%	35.3%	28.9%
Haddock	17	£3.9	1.3	£2.89	10.2%	11.2%	-0.9%
All Others		£440.6	133.6	£3.30	-2.2%	2.6%	-4.7%
Grand Total		**£1,791.2**	**447.8**	**£4.00**	**-6.0%**	**-2.7%**	**-3.5%**

Key: value & volume increase, value & volume decline

Trade tariff tool



https://public.tableau.com/profile/seafish#!/vizhome/SeafishTradeandTariffTool/Overview seafish

Market Insight

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Example Reports & Insights

All Reports (Open Access)

- Market Insight Introduction
- Cod Factsheet – April 2019
- Haddock Factsheet – April 2019

Retail and Foodservice Reports (Restricted Access)

- Retail Observations – August 2019
- Nielsen Monthly Reports – 10.08.2019
- Category Insight Report – June 2019
- Fish and Chips in Independent Fish and Chip Shops – 2018
- Q2 Seafood Report and Data Sheet

New Subscribers

Sources: Seafish.org, Market Insights

About our Retail Data

- Complete picture of retail and consumer shopping trends.
- Wide range of reports available.
- New data received every 4 weeks.

Sources: Nielsen, 2019

Shopper News

57%

consider **healthy food** options as **very important**

Fresh/Natural/ Less Processed	Better for the environment	Value for money
+6PP	**+5PP**	**+5PP**

Sources: Nielsen Seafish Retail Seafood Insight, July 2019, Homescan; Nielsen State of the Nation, 2019.

Seafood Overview

Seafood in UK retail market is worth:

£3.8bn
-0.2%

391,742t
-0.8%

Price driven decline

Average price per kg

£9.74
+0.6%

Sources: Nielsen Answers, 10.08.2019, Scantrack

Seafood Overview KPI’s

97% of shoppers buy seafood every 12 days

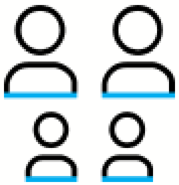
Spending more, buying less and less often.

Frequency

-0.7%

Trip Volume

-0.5%



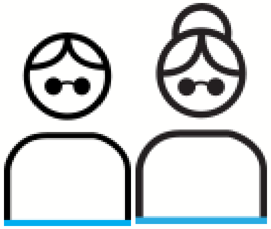
Households

+0.8%

Sources: Nielsen Context Report, 10.08.2019, Homescan: Sources: Nielsen Seafish Retail Seafood Insight, July 2019, Homescan

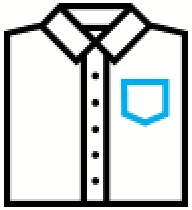
The Seafood Shopper

Older families no children



69% of volume sales bought by families of at least one member +35 years old and with no children

Highly skilled professionals



78% of volume sales bought by families made up by high skilled professionals and in managerial roles

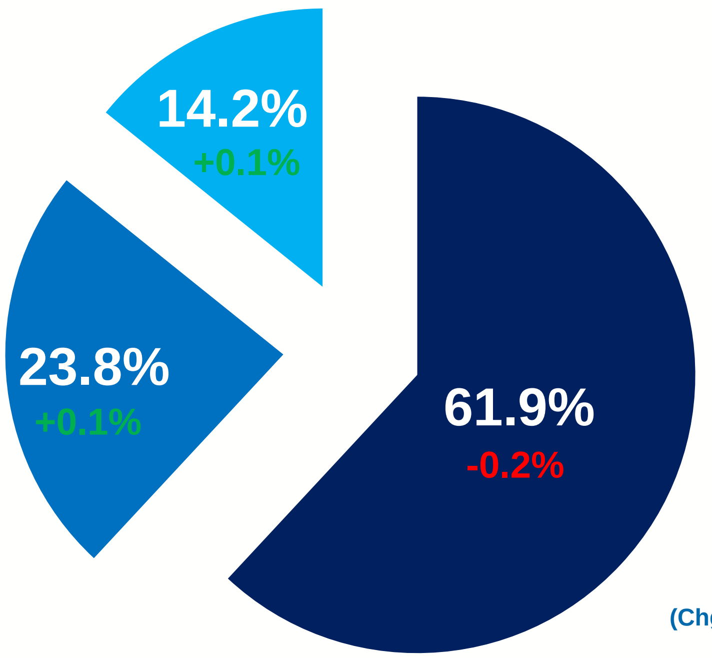
2 Member families

66% of volume sales bought by families up to 2 members

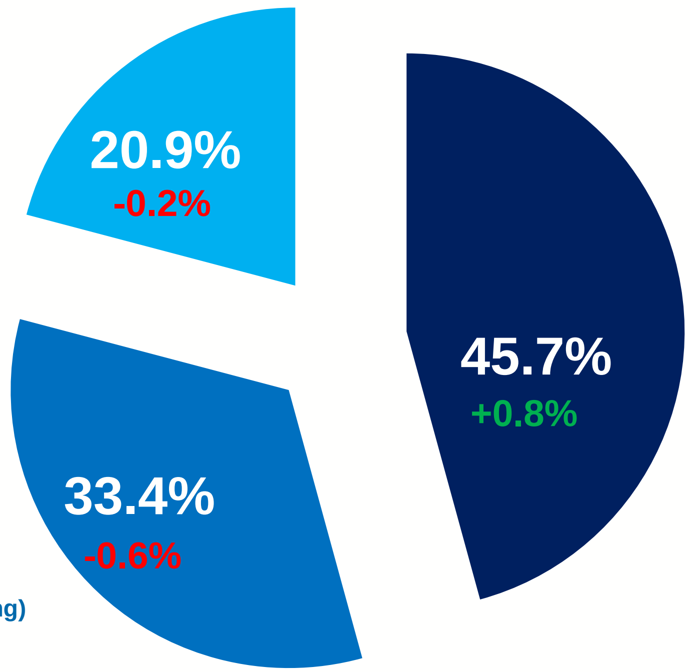
Sources: Nielsen Seafish Retail Seafood Insight, July 2019, Homescan; Nielsen State of the Nation, 2019.

UK Market Sector Share

Value Sales



Volume Sales



(Chg = % Share Chg)

CHILLED FROZEN AMBIENT

Sources: Nielsen Answers, 10.08.2019, Scantrack

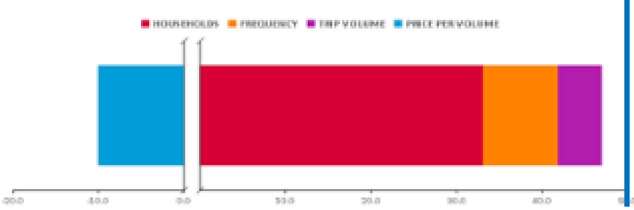
Seafood Sectors

Chilled

£2.4bn
-0.6%

£/Kg 13.19
-1.5%

179,178t
+0.9%

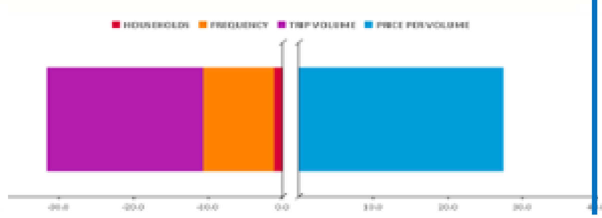


Frozen

£910m
+0.2%

£/Kg 6.96
+2.8%

130,726t
-2.5%

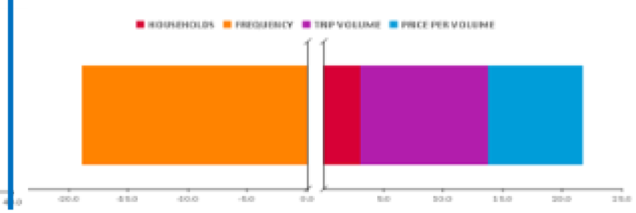


Ambient

£543m
+0.6%

£/Kg 6.63
+2.4%

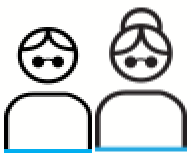
81,839t
-1.7%



Sources: Nielsen Answers, 10.08.2019, Scantrack, Nielsen Context Report, 10.08.2019, Homescan

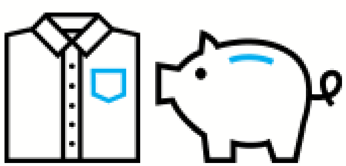
Seafood Sector Shoppers

CHILLED



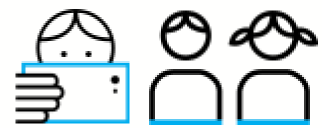
+55 years old with no children

Up to 2 members

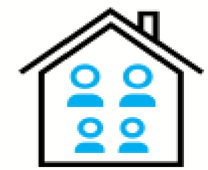


Higher Managerial and State Pensioners

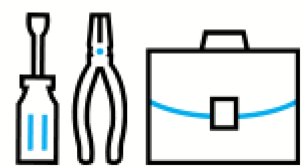
Ambient & Frozen



Under 35's and Families with children



+2 members



Manual workers and Administrative Professionals

Sources: Nielsen Seafish Retail Seafood Insight, July 2019, Homescan

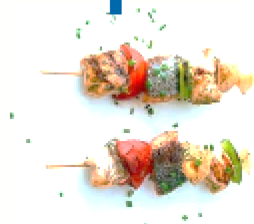
Seafood Top Segments

Natural

110,596t
(+2.3%)

£1.7bn
(+0.7%)

Prepared



103,225t
(-3.3%)

£839m
(-2.8%)

Fingers

34,581t
(+1.2%)

£174m
(+5.5%)

Sushi

Largest growth come from Sushi
6,573t (+13.0%) | £106m (+8.9%)

Sources: Nielsen Answers, 10.08.2019, Scantrack

Seafood Sectors: Top Segments

Chilled

Natural
81,666t (+4.2%) | £1.4bn (+1.0%)

Prepared
26,205t (-4.6%) | £309m (-6.8%)

Meals
22,248t (-2.0%) | £158m (-3.7%)

Frozen

Fingers
34,060t (+1.4%) | £169m (+5.6%)

Natural
28,930t (-2.7%) | £286m (-0.4%)

Meals
21,833t (-0.1%) | £149m (+3.3%)

Ambient

Prepared
72,953t (-2.1%) | £497m (+0.6%)

Sauce
8,874t (+1.5%) | £46m (+0.4%)

Sources: Nielsen Answers, 10.08.2019, Scantrack

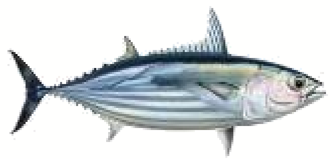
Seafood Top Species

Salmon

62,906t (+1.1%)

£1.1bn (0.0%)

Tuna



60,041t (-1.9%)

£405m (+0.1%)

Cod

59,006t (-3.4%)

£483m (+0.2%)

Pollock

31,117t (+10.4%)

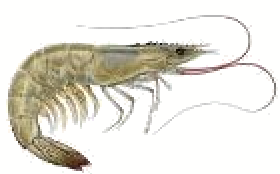
£148m (+16.4%)

Haddock

24,368t (-7.5%)

£240m (-4.2%)

WW Prawns



24,004t (+3.2%)

£325m (+0.2%)

Mixed

21,028t (+2.0%)

£190m (+3.4%)

Mackerel

17,380t (-3.5%)

£130m (-0.6%)

Sources: Nielsen Answers, 10.08.2019, Scantrack

Seafood Sectors: Top Species

Chilled

Salmon
51,149t (+5.1%) | £949m (+1.0%)

Cod
20,073t (+4.6%) | £228m (+3.1%)

Mixed
17,156t (+1.0%) | £161m (+2.5%)

Frozen

Cod
38,877t (-7.0%) | £255m (-2.4%)

Pollock
29,594t (+9.7%) | £141m (+15.8%)

Other
9,993t (-0.6%) | £34m (+0.5%)

Ambient

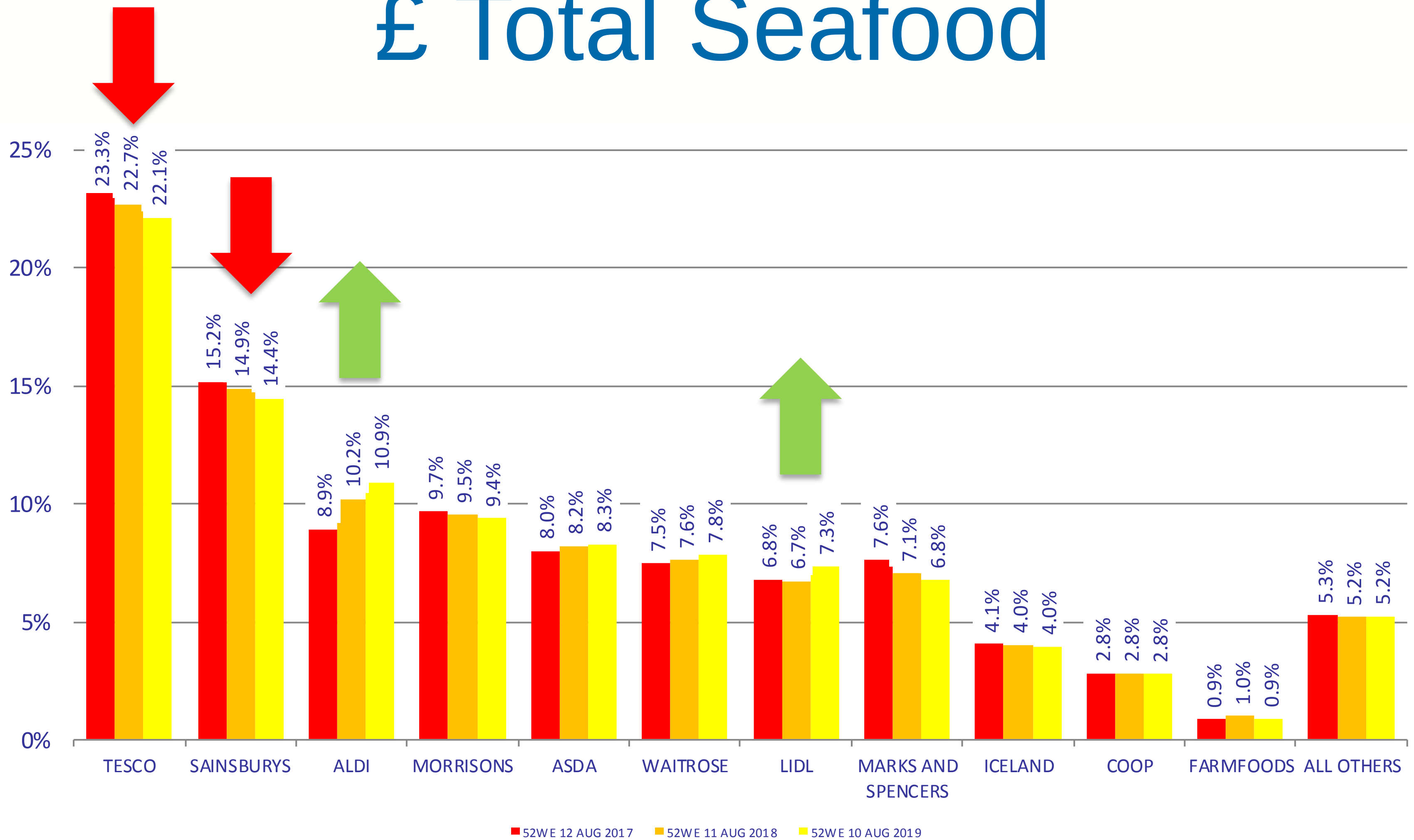
Tuna
55,752t (-1.5%) | £353m (+1.4%)

Mackerel
8,271t (+4.0%) | £50m (+5.5%)

Sardines
8,229t (+1.1%) | £39m (+3.1%)

Sources: Nielsen Answers, 10.08.2019, Scantrack

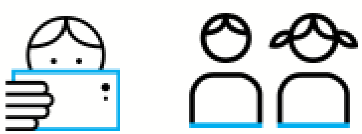
Retailer Share of Trade £ Total Seafood



Sources: Nielsen Context Report, 10.08.2019, Homescan

Retailer Shoppers

Aldi, Lidl and Asda **cheaper** across Seafood

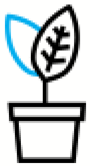
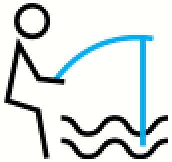


Asda and Discounters* are more popular between **under 35's and Families with children**

Older shoppers with no children tend to shop at more premium Retailers

Sources: Nielsen Seafish Retail Seafood Insight, July 2019, Homescan

Retail Considerations

1. Watch the trends: health & environment 
2. Value for money 
3. Food quality - freshness 

Consider the market you are playing in and where your shoppers shop

Market Insight

- Seafood consumption
- Marketing
- Supply
- Retail
- Foodservice
- Q&As

@seafishuk

About our Foodservice Data

- Consumer restaurant behaviour captured through online surveys from a maintained, representative panel.
- New data received every quarter.

Sources: NPD, July 2019, CLG NPD Foodservice Seafood Insight

Foodservice News

- Digital ordering is growing +16%
- Older generation reducing eating out visits

Sources: NPD, July 2019, CLG NPD Foodservice Seafood Insight

Seafood Overview

£4.6bn

(+7.3%)

servings

1.20bn

(+3.7%)

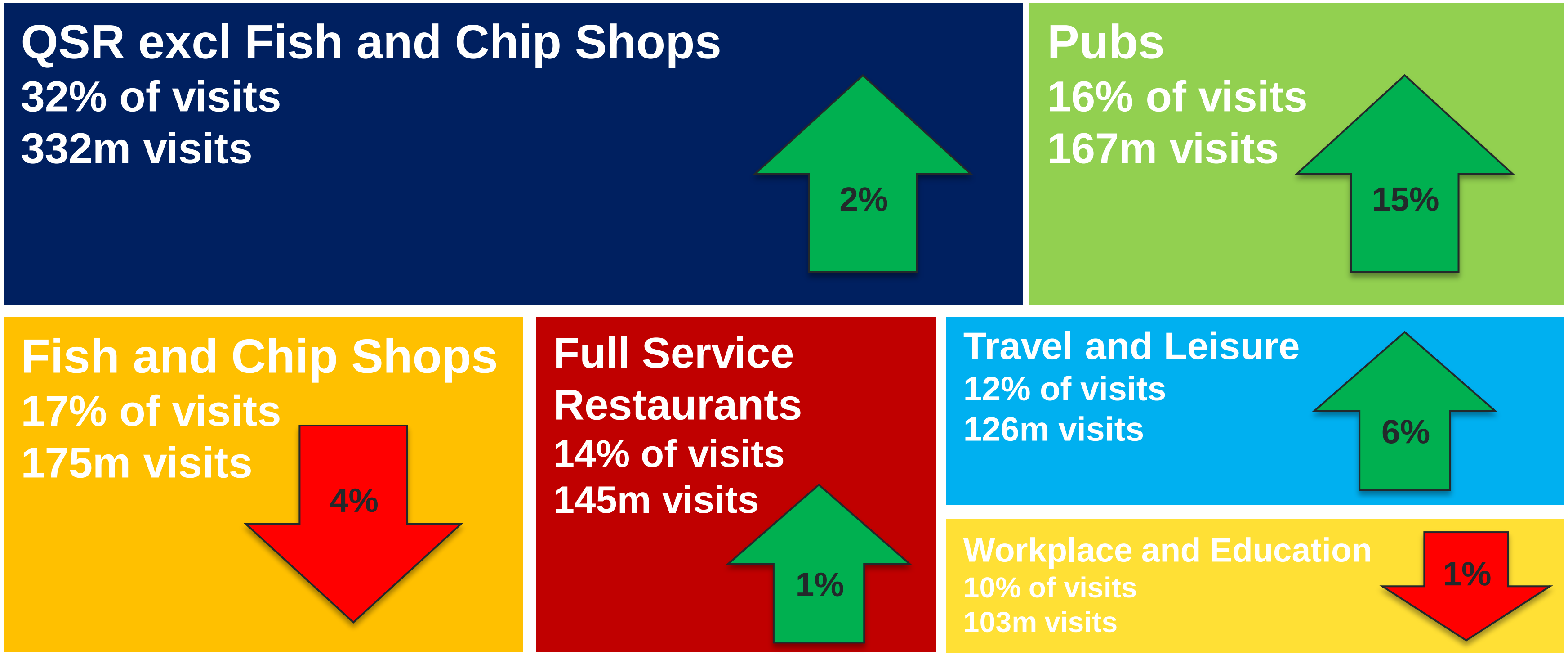
visits

1.06bn

(+3.1%)

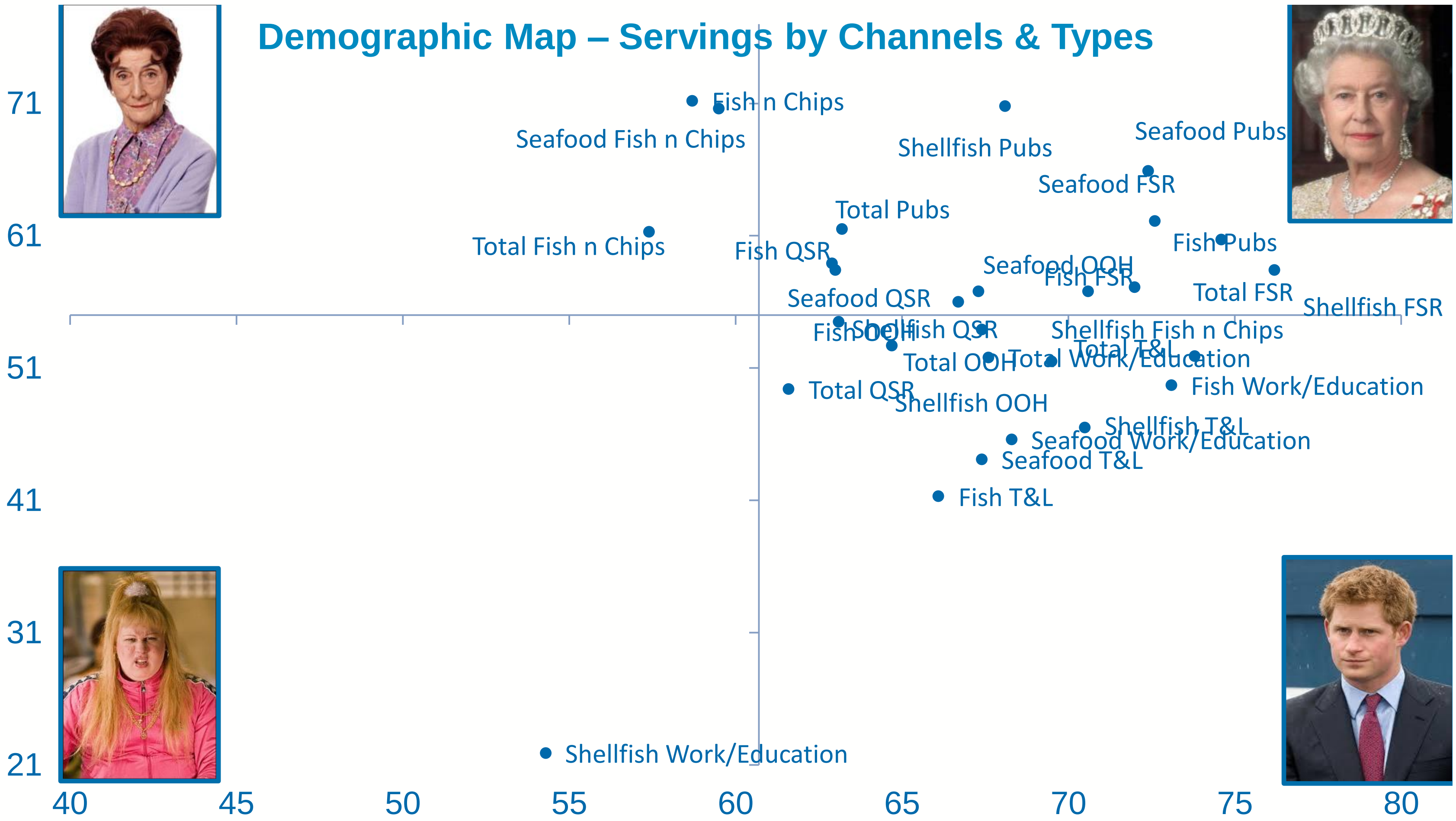
Sources: NPD, Q2 2019, Seafood Data Sheet

Foodservice Channels



Sources: NPD, Q2 2019, Seafood Data Sheet; NPD, Q2 2019, Seafish Q2 Report

Seafood Demographics



Sources: NPD, Q2 2019, Seafish Q2 Report

Seafood Categories

Fried Fish

435m servings

Cod (58%)

Haddock (20%)

Fish Fingers (11%)

Non-Fried Fish

304m servings

Tuna (49%)

Salmon (26%)

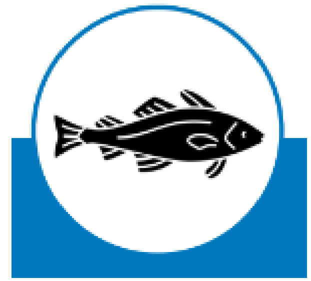
Other (8%)

Sources: NPD, July 2019, CLG NPD Foodservice Seafood Insight

Winners & Improvers

WINNERS

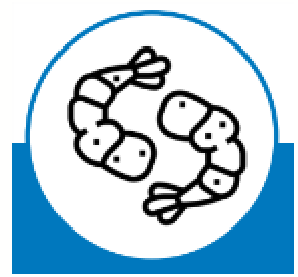
Fried Fish
+43m



Fried Cod
+23m

IMPROVERS

Fishcake
-2m



Scampi
-2m

Sources: NPD, July 2019, CLG NPD Foodservice Seafood Insight

On the Menu

- Prawns and salmon most popular
- Herring, sardine and cockle growing
- Garlic & tomato and chilli flavours
- Fresh/freshly descriptors
- Soft shell crab breaded starters
- Coriander breaded starters

Sources: Technomic, July 2019, UK Seafood Trends

Key Opportunities: No 1

Snacking

Seafood is under-indexing for snacking occasions

Balanced, portable snack foods

Sources: NPD, Q2 2019, Seafish Q2 Report

Key Opportunities: No 2

QSR excl Fish and Chip Shops

Seafood needs a bigger presence

Innovative new products and improved quality

Sources: NPD, Q2 2019, Seafish Q2 Report

Watch Out: Future Trends

Sustainability

Automation

Sources: NPD, Q2 2019, Seafish Q2 Report

Foodservice Considerations

1. QSR (excl. Fish & Chips) key opportunity
2. Target the younger consumer
   - without alienating the loyal older consumer
3. Seafood on the go
4. Eye on trends

Key Takeaways

Key Takeaways

1. Value for money
2. Quality
3. Eye on trends
4. Encourage all demographics
5. Seafood snacks

Market Insight

- Seafood consumption
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