SEAFISH

Market Insight Factsheet

Frozen Seafood in Multiple Retail 2017

Frozen seafood has been in decline since 2007, with frozen sauce and frozen seafood meals being the hardest hit, losing over -50% volume. Over the short term (52 wks. to 25th March 2017) many frozen segments remained in decline, but frozen batter, natural, fingers, dusted and sushi segments are back in growth.

This factsheet provides a summary of the performance of the frozen seafood sector in the multiple retail seafood market; covering the detail behind the current/historic performance of the frozen seafood sector, segments and species. Also included are frozen seafood shopper trends including frozen seafood shopper missions, and channel opportunities.

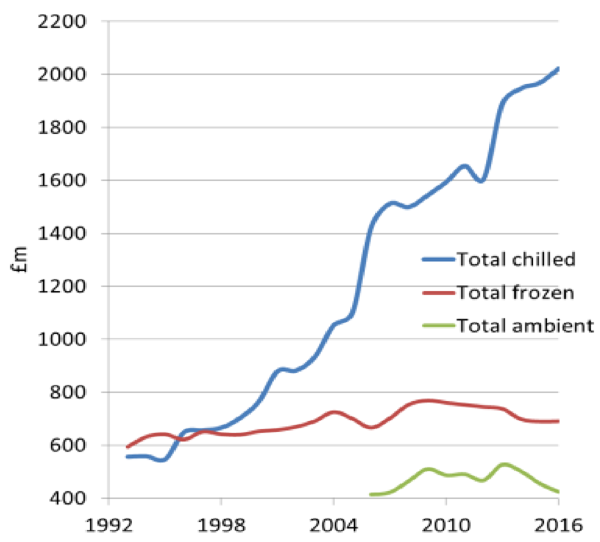
September 2017

Historic Retail Seafood Sector Trends

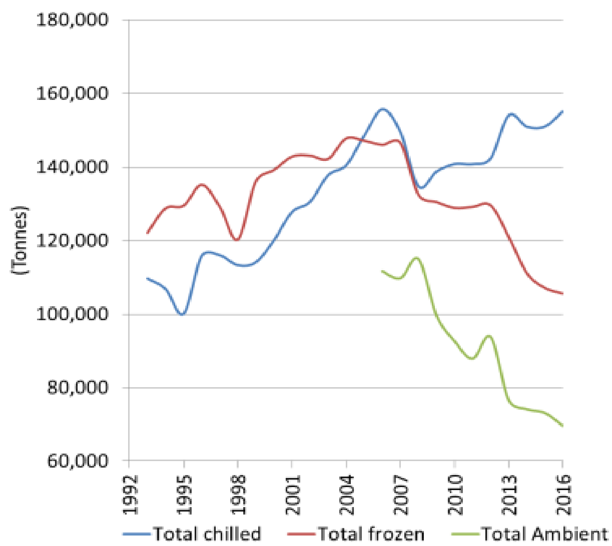
Chilled seafood has grown in popularity with British retail shoppers over the past 20 years. In the late 1990's both the volume and value of chilled seafood began to rise faster than that of frozen seafood. By 2005, chilled seafood had overtaken frozen seafood in volume sales. Overall GB seafood consumption had been growing slowly but steadily until recession hit in 2007, when the relatively high price of seafood meant it struggled to compete with cheaper proteins.

From 2007, seafood in multiple retail experienced a sustained period of inflation and price driven growth as consumption fell. Around 2009, retail shoppers became polarized, saving money where possible on basics, but not averse to spending more on quality. Austerity focused shoppers prioritised 'value for money', and the perceived 'superior freshness, health and quality' of chilled seafood resulted in continued growth of the chilled sector at the expense of frozen and ambient, despite it being double the average price. In October 2016, total seafood (total seafood includes chilled, frozen and ambient) finally returned to full growth for a short period before volume returned to decline in January 2017.

Long Term Seafood Sector Value Trends



Long Term Seafood Sector Volume Trends



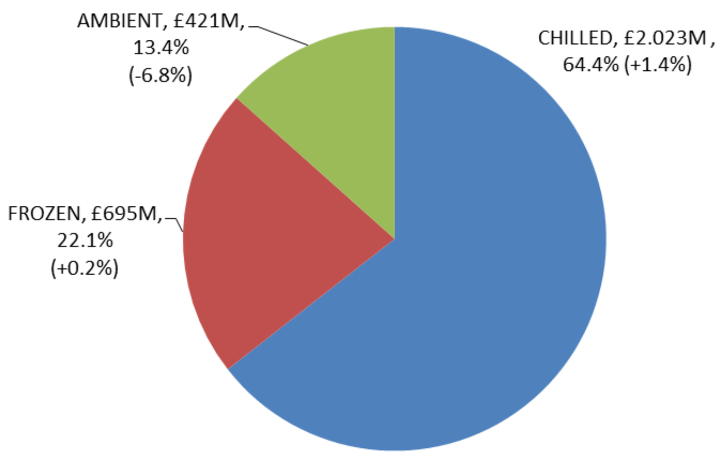
(Nielsen Scantrack –52wks to 25.3.17)

Current Seafood Sector Performance

Seafish has detailed EPOS data (Electronic Point of sale) available for the past nine years which can be used for a long term picture of the changes in the seafood sectors, segments and species.

In March 2017, total GB retail seafood sales were worth £3.14bn (+0.7%), with a volume of 327,004 tonnes (-0.8%) and an average price of £9.60/kg (+1.5%) (Nielsen Scantrack: 52 weeks to 25th March 2017 excludes discounters). Over the nine years from 2008 to March 2017, total seafood has been in price driven growth, with volume down by -16% and value up by 16%, pushing average price up by 18%.

Sector Value Share of Seafood 2017

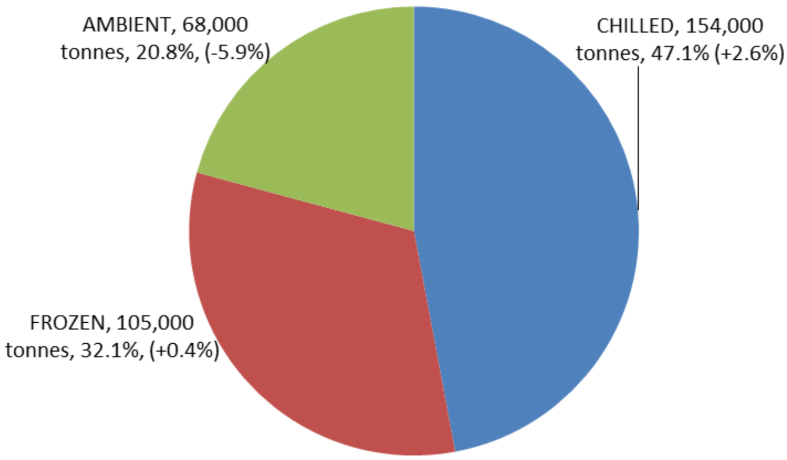


Frozen Seafood

In the 52 wks. to 25th March 2017, frozen seafood took the second largest share of the category behind chilled; increasing both its value and volume share at the expense of ambient. Frozen seafood was worth £695m (+0.9%) with a volume of 105,093 tonnes (-0.4%); with an average price of £6.61/kg (+1.4%).

Over the long term (9 years to 25th March 2017), frozen seafood has been in decline, with volume down by -23% and value down by -4%. Average price grew by 24%.

Sector Volume Share of Seafood 2016



(Nielsen Scantrack –52wks to 25.3.17 - % Share & % Share Chg)

Frozen Seafood KPI's

In the 52wks to 25th March 2017, fewer shoppers bought frozen seafood as average price increased. Penetration remained significantly higher than that of chilled or ambient seafood, with 86.6% of shoppers buying frozen seafood. Compared with the previous year, shoppers bought frozen seafood less often and baskets became smaller. On average, frozen shoppers bought 0.5kg of frozen fish per trip spending £3.26; buying frozen seafood 10.8 times per year, spending a total of £35.21, equating to 5.9kg over the year.

Seafood Key Performance Indicators (KPI's)

		Pen %	Freq	AWOP (Kg) 52w	Avg Spend (£) 52w	Trip Spend (£)	Price per Kg	Avg Trip Kg
TOTAL FISH	26 MAR 2016	96.85	30.31	15.27	£120.84	£3.99	£7.91	0.50
	25 MAR 2017	96.89	30.79	15.12	£123.92	£4.02	£8.19	0.49
	% Change	0.0	1.6	-1.0	2.5	0.9	3.6	-2.5
AMBIENT	26 MAR 2016	80.64	9.38	4.06	£22.00	£2.35	£5.42	0.43
	25 MAR 2017	79.79	9.39	3.99	£21.38	£2.28	£5.35	0.42
	% Change	-1.1	0.1	-1.7	-2.8	-2.9	-1.2	-1.8
CHILLED	26 MAR 2016	80.52	19.61	7.83	£85.29	£4.35	£10.89	0.40
	25 MAR 2017	81.64	20.25	7.81	£88.80	£4.39	£11.37	0.39
	% Change	1.4	3.3	-0.3	4.1	0.8	4.4	-3.4
FROZEN	26 MAR 2016	87.18	10.95	5.98	£35.13	£3.21	£5.87	0.55
	25 MAR 2017	86.62	10.79	5.88	£35.21	£3.26	£5.99	0.54
	% Change	-0.6	-1.5	-1.7	0.2	1.7	2.0	-0.2

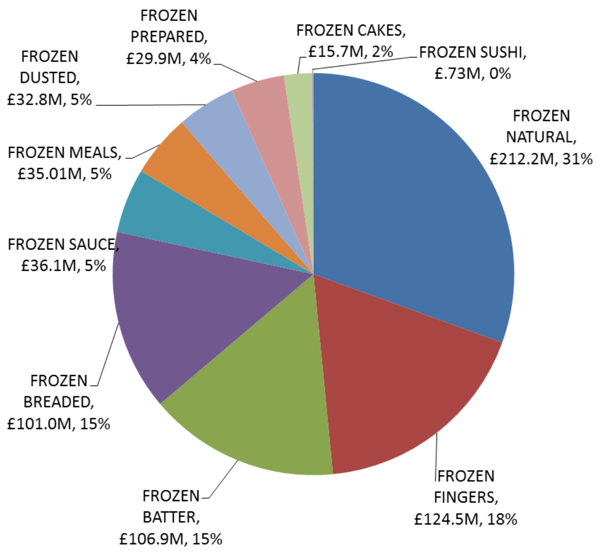
(Data: Nielsen Homescan)

Frozen Seafood Segment Performance

It is the frozen natural segment (i.e. includes no additional ingredients) which takes the largest share by value (31%), followed by fingers (18%) and batter (15%) which recently displaced frozen breaded into 4th place. Frozen fingers take the largest share by volume of the frozen seafood sector. In the 52wks to 25th March 2017, frozen natural was in price driven growth worth £212.2m (+17%), with 21,974 (-8%) tonnes and an average price of £9.47/kg (27.9%). Frozen natural has one of the highest average prices of all the frozen segments, second only to frozen sushi.

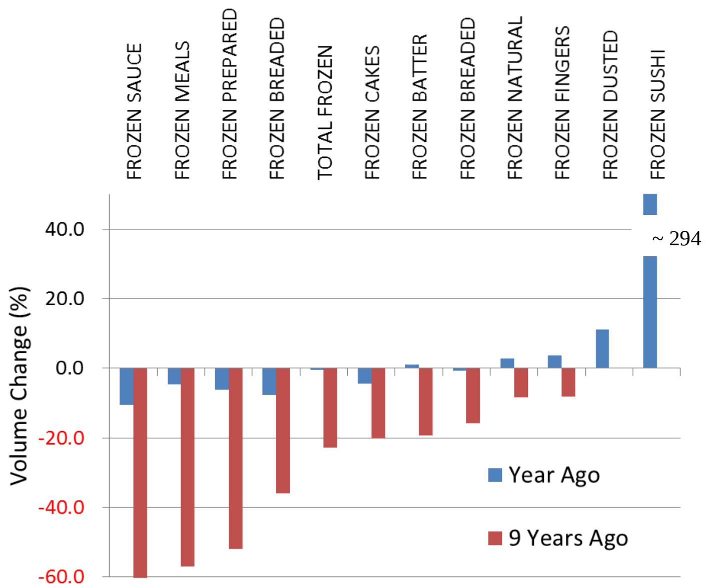
Over the 9 years to 25th March 2017, none of the frozen segments were in growth; frozen natural and fingers saw an increase in value as a result of inflation and lost the least volume. Frozen sauce and frozen seafood meals were the hardest hit, losing over -50% volume. Over the short term (52 wks. to 25th March 2017) many frozen segments remained in decline, but frozen batter, natural, fingers 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 2017 (value)



(Data: Nielsen Scantrack – 9yrs/52wks to 25.3.17)

Long & Short Term Frozen Segment Volume Trends (2017 vs 2009)



Frozen Segment Performance

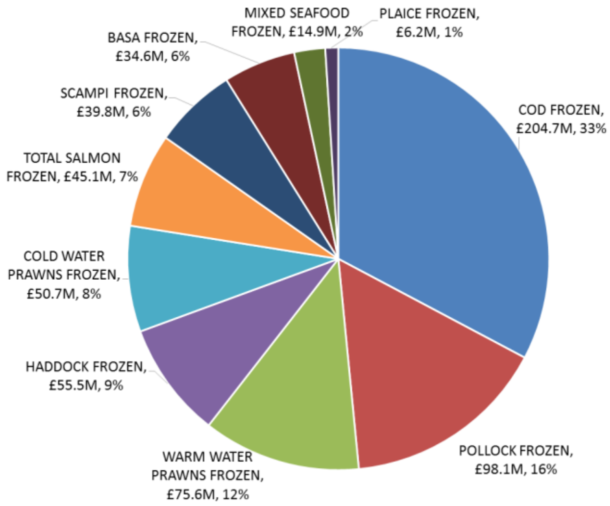
	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2015 52wks to 25.3.15	**2016** 52wks to 25.3.16	**2017** 52wks to 25.3.17	**% Chg '16 vs '17**	**% Chg 2008 vs 2017** (9YA)	**2015** 52wks to 25.3.15	**2016** 52wks to 25.3.16	**2017** 52wks to 25.3.17	**% Chg '16 vs '17**	**% Chg 2008 vs 2017** (9YA)	**Avg Price 2017**	**Avg Price % Chg '16 vs '17**	**£ % Chg 2008 vs 2017** (9YA)
TOTAL SEAFOOD	3,112,077	3,116,959	3,138,797	0.7	16	330,897	329,523	327,004	-0.8	-15.8	£9.60	1.5	38.1
TOTAL CHILLED	1,938,399	1,980,236	2,022,941	2.2	32	148,385	151,168	153,893	1.8	11.1	£13.15	0.3	18.8
TOTAL FROZEN	693,241	688,361	694,838	0.9	-4	109,918	105,529	105,093	-0.4	-22.7	£6.61	1.4	24.0
TOTAL AMBIENT	480,437	448,361	421,018	-6.1	-4	72,593	72,826	68,019	-6.6	-40.1	£6.19	0.5	59.8
FROZEN NATURAL	194,932	208,299	212,174	1.9	17	21,253	21,887	22,511	2.9	-8.3	£9.43	-1.0	27.9
FROZEN FINGERS	124,290	119,472	124,463	4.2	7	25,976	25,334	26,254	3.6	-8.3	£4.74	0.5	16.7
FROZEN BATTER	97,506	100,776	106,860	6.0	-11	16,472	16,515	16,701	1.1	-19.4	£6.40	4.9	10.2
FROZEN BREADED	118,056	106,242	101,033	-4.9	-24	17,332	14,784	13,646	-7.7	-35.9	£7.40	3.0	17.8
FROZEN SAUCE	43,945	40,299	36,117	-10.4	-63	6,015	5,171	4,627	-10.5	-82.9	£7.81	0.2	119.9
FROZEN MEALS	37,070	36,065	35,012	-2.9	-50	10,196	9,663	9,209	-4.7	-57.0	£3.80	1.9	17.3
FROZEN DUSTED	25,929	29,673	32,843	10.7	N/A	3,374	3,460	3,845	11.1	N/A	£8.54	-0.4	N/A
FROZEN PREPARED	33,881	31,088	29,940	-3.7	-49	4,636	4,392	4,126	-6.1	-52.0	£7.26	2.5	5.7
FROZEN CAKES	17,631	16,262	15,663	-3.7	-16	4,663	4,307	4,112	-4.5	-20.2	£3.81	0.9	5.2
FROZEN SUSHI	NA	186	733	293.0	N/A	NA	16	61	293.7	N/A	£11.97	-0.2	N/A

Nielsen Scantrack 52wks to 25.3.17

Frozen Seafood Species

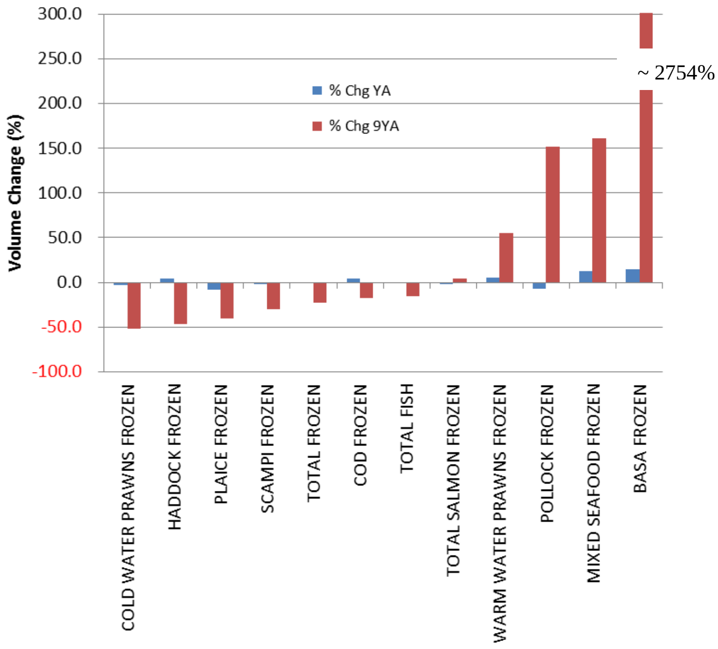
In 2017, cod continues to dominate the frozen seafood sector, growing value share to 33%, selling over twice its nearest competitor by value. Affordability and improved availability have driven cod consumption in recent years. In the 52wks to 25th March 2017, frozen cod was worth £204.7m, with 33,131 tonnes, with volume and value increasing by 6.1% and 4.6% respectively. Pollock, is the next most popular species with 16% value share, followed closely by warm water prawns (12%), haddock (9%) and cold water prawns (8%).

Top 10 Frozen Species Share (value) 2017



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

Long & Short Term Frozen Segment volume trends (2017 vs 2008)



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

The overall 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 sector, frozen has bucked this trend. From 1974 to 2015, whitefish consumption has declined over four times faster (-69%) in the chilled sector, compared to in frozen (-16%) (Defra Family Food). Likewise, over the same period frozen shellfish consumption (465%) has grown significantly faster than that of chilled (275%).

Over the 9 years to 25th March 2017, frozen basa, lobster, pollock, mixed seafood, warm water prawns and mussels were the top performing species by value growth.

Over the same 9 year period, frozen species in full volume and value decline were cod, haddock and cold water prawns. Significant price increases are usually the main driver of volume decline; but cod and haddock declined heavily despite relatively modest price increases of 10.3% and 11.1% respectively, compared to the sector average (24%). Cold water prawns however experienced a significant price increase of 68.4% over the same period; this undoubtedly impacted on the 52% fall in volume. Alternatives to cod and haddock like basa (Pangasius) continues to grow strongly (+2,754%) from a small base, despite a higher average price. Frozen basa is predicted to overtake frozen haddock in popularity in the next 3 years if current trends continue. Over the short term (52wks to 25th March 2017) cod and haddock have returned to growth, with seabass, mussels, basa, and mixed seafood, in double digit growth.

Frozen Species Performance 2015 to 2017

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2015 52wks to 25.3.15	**2016** 52wks to 25.3.16	**2017** 52wks to 25.3.17	**% Chg '16 vs '17**	**% Chg 2008 vs 2017** (9YA)	**2015** 52wks to 25.3.15	**2016** 52wks to 25.3.16	**2017** 52wks to 25.3.17	**% Chg '16 vs '17**	**% Chg 2008 vs 2017** (9YA)	**Avg Price 2017**	**Avg Price % Chg '16 vs '17**	**£ % Chg 2008 vs 2017** (9YA)
TOTAL FISH	3,112,077	3,116,959	3,138,797	0.7	16.3	330,897	329,523	327,004	-0.8	-15.8	£9.60	1.5	38.1
TOTAL FROZEN	693,241	688,361	694,838	0.9	-4.2	109,918	105,529	105,093	-0.4	-22.7	£6.61	1.4	24.0
COD FROZEN	178,257	192,901	204,740	6.1	-9.7	30,053	31,679	33,131	4.6	-18.1	£6.18	1.5	10.3
POLLOCK FROZEN	141,215	109,734	98,140	-10.6	177.2	30,164	24,840	22,952	-7.6	152.0	£4.28	-3.2	10.1
WARM WATER PRAWNS FROZEN	66,443	72,416	75,642	4.5	90.6	5,249	6,088	6,403	5.2	55.5	£11.81	-0.7	22.5
HADDOCK FROZEN	54,470	53,822	55,456	3.0	-40.3	7,512	7,347	7,682	4.6	-46.3	£7.22	-1.5	11.1
COLD WATER PRAWNS FROZEN	52,355	51,324	50,655	-1.3	-19.2	5,638	4,704	4,554	-3.2	-52.0	£11.12	2.0	68.4
TOTAL SALMON FROZEN	44,891	45,718	45,084	-1.4	19.8	5,710	6,148	6,052	-1.6	4.3	£7.45	0.2	14.9
SCAMPI FROZEN	39,751	39,992	39,826	-0.4	-23.2	3,970	3,897	3,814	-2.1	-30.3	£10.44	1.8	10.3
BASA FROZEN	24,351	30,129	34,597	14.8	2712.8	3,389	4,215	4,824	14.4	2754.4	£7.17	0.3	-1.5
MIXED SEAFOOD FROZEN	10,670	13,111	14,877	13.5	175.5	1,340	1,570	1,775	13.0	161.4	£8.38	0.4	5.4
PLAICE FROZEN	7,544	7,033	6,192	-12.0	-36.5	1,031	896	821	-8.4	-40.3	£7.54	-3.9	6.5
SOLE FROZEN	6,971	5,934	5,396	-9.1	14.7	608	485	437	-9.8	2.6	£12.35	0.9	11.8
TUNA FROZEN	4,265	4,309	4,226	-1.9	-34.1	696	644	639	-0.8	-54.3	£6.61	-1.2	44.2
SCALLOPS FROZEN	4,313	5,154	4,165	-19.2	-12.9	209	227	171	-24.8	-41.6	£24.42	7.5	49.6
LOBSTER FROZEN	1,785	5,076	3,961	-22.0	190.4	93	265	182	-31.4	127.5	£21.77	13.7	27.7
SEA BASS FROZEN	1,091	2,286	3,061	33.9	15.4	78	180	236	30.9	48.4	£13.00	2.3	-22.1
SQUID (CALAMARI) FROZEN	2,579	3,349	2,891	-13.7	23.7	245	402	265	-34.1	-24.5	£10.90	31.0	63.7
MUSSELS FROZEN	1,828	2,001	2,577	28.8	74.1	322	329	426	29.4	67.1	£6.05	-0.4	4.2

(Nielsen Scantrack 9yrs/52wks to 25.3.17)

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. Frozen seafood is seen as a 'convenient' shopping list staple; however 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. Conversely, 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.

> Recent campaigns like 'The Power of Frozen' appear to be working; 60% of shoppers now believe frozen quality is equal to chilled vs 53% pre campaign

Many of these misconceptions or issues can be addressed through packaging and consumer education.

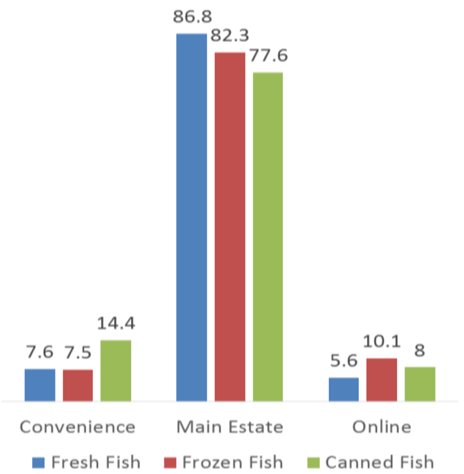
Some benefits of frozen seafood:

- 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.

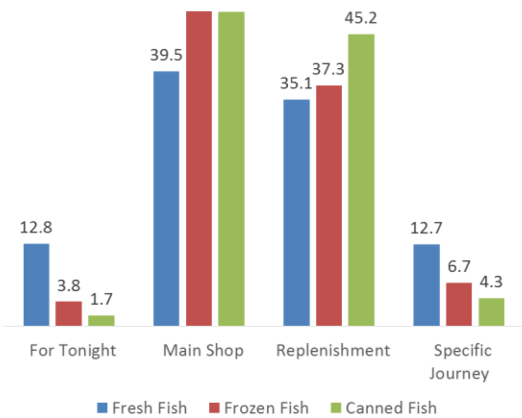
The Frozen Seafood Shopper Journey

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 (IGD) benchmarking of the seafood shopper, the insight, can be used to guide NPD, marketing and sales strategy. Successful products will tap into the frozen shopper current desire for new and different products, encourage trade up, and offer high quality and save preparation time. The fact that brands have less influence in the frozen category opens up new opportunities. Range is also key for frozen ready meals with 59% of shoppers wanting to try new recipes and flavours. Shoppers also report struggling to find healthy frozen ready meals, with frozen meals ranking in the top 5 confusing categories to shop. Frozen meat and fish shoppers are more willing to pay extra for quality and rank ethics higher than the total grocery average (IGD). Compared to chilled, 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. But there are degrees of engagement, ranging from frozen breaded and battered shoppers who have minimal engagement, through to frozen natural shoppers who are much more quality focused, don't lack confidence and are willing to experiment to an extent with seafood.

Channel by Seafood Sector 2016 (Value)



Shopper Missions by Seafood Sector 2016 (Value)



Kantar World Panel June 2016

Frozen Seafood Shopper demographics

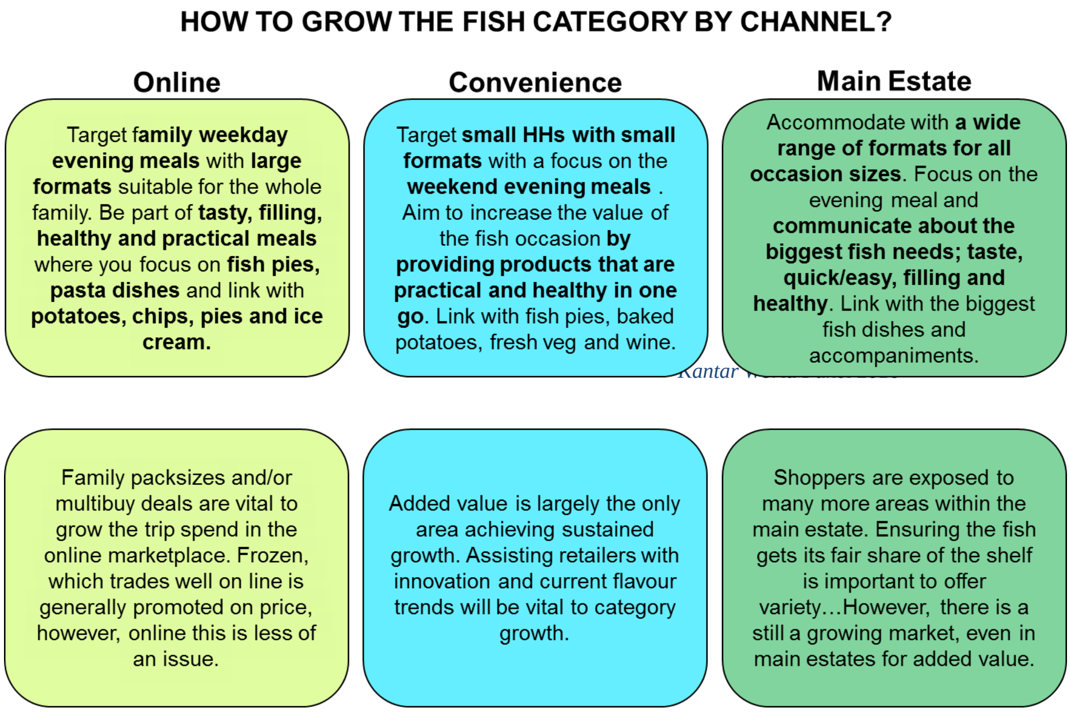
The frozen seafood shopper is younger and less affluent compared to the average chilled fish shopper. The frozen shopper is predominantly C1 & AB, with 2 or 3-4 household members. Frozen shoppers are typically aged 45-64 but exhibit a higher proportion of 35-44 yr. old shoppers than chilled. Although predominantly adult only, older couple households, there are more likely to be children present than for chilled, typically in the age group of 5-10 years, households predominantly maturing or post family.

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 is usually made before going to store, rather than in the 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.

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 the key to growth. Main estate is the key channel for frozen seafood, selling 82.3% of frozen seafood by volume. Frozen also has a greater presence in online than chilled, as chilled shoppers often prefer to choose their seafood themselves. 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. 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. Cconvenience 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. Food discounters are a key channel, over indexing in frozen seafood. Many discounters have a clear 'good, better, best' range within frozen meat, fish and poultry that aids navigation and makes it easier for shoppers to trade-up. They have a wide range of different products to appeal to the main shopping mission; 65% of frozen meat, fish and poultry shoppers were on a main shop on their last trip (IGD).

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 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; they are also more inclined to try alternative species and preparation/recipe inspiration.

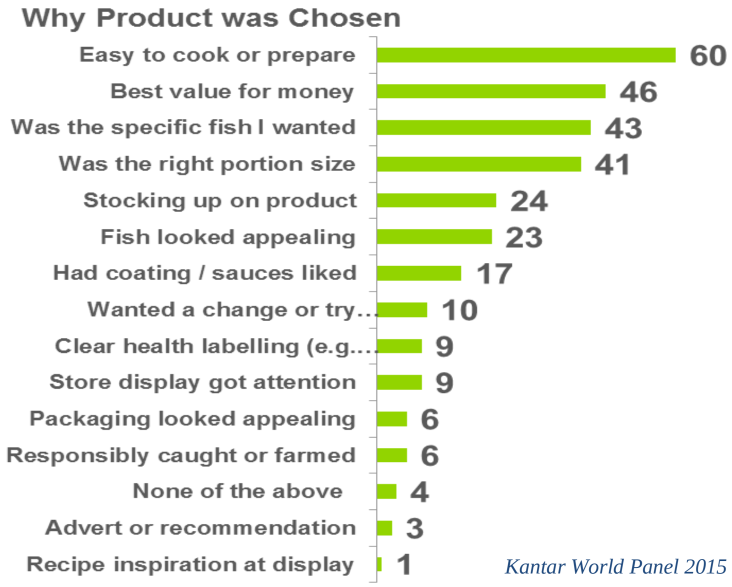
Key barriers to purchase at fixture are packs that do not let the shopper assess the appearance and portion size of the product. If the product is frozen at sea this could be made clear on pack. Seafood shoppers want more recipe inspiration at fixture.

Recently, the grocery landscape has been shifting to a position of simplicity. The number of stock keeping units (SKUs) at fixture are 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.

Eating frozen seafood

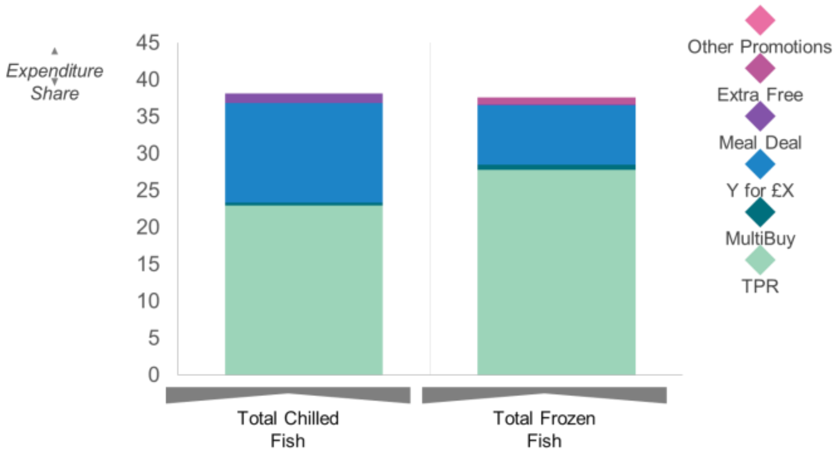
Frozen seafood is typically eaten at dinner/tea, the occasion being slightly more child orientated than chilled. Consumers report the eating experience of frozen fish offers less of a sweet, fresh flavour and does not feel healthy compared to chilled seafood, these responses are more

General Seafood Purchase Drivers 2015



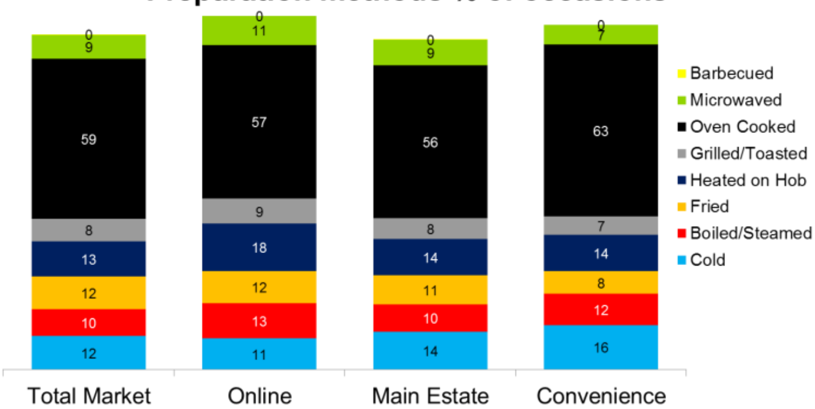
Kantar World Panel 2015

Promotions follow the general trend of price cuts with slightly more volume deals in the chilled sector



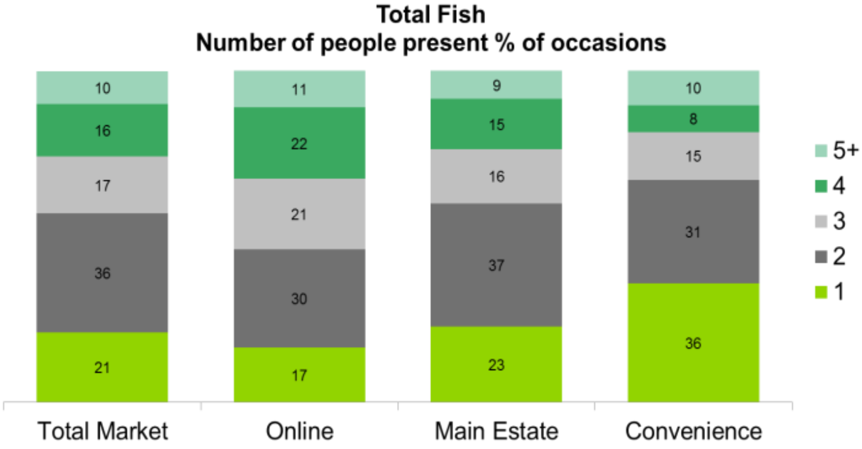
Kantar World Panel 2016

Total Fish Preparation methods % of occasions



Kantar World Panel 2016

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 vegetables 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 new product development 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 filtering down from foodservice remain as American/ South American (especially Mexican) and Far Eastern. Key flavours are lemon, garlic and chili. Growing formats are smoked, sushi and 'poke' a Hawaiian raw fish salad superfood.

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

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.

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SEAFISH

Data Sources:

(%) values represent change from the previous year unless otherwise stated

- Retail data: AC Nielsen Scantrack/Homescan: 52 weeks to March 25th 2017 (excludes discounters and 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 2015
- IGD 2016 Category Benchmarks
- IGD Quality in Focus 2016 Update

More Information:

For the full range of market insight factsheets, covering different sectors of the seafood industry go to the Seafish website:

http://www.seafish.org/research-economics/market-insight/market-insight-factsheets

Information and insight is available free of charge for levy paying seafood businesses. Click here to register for the monthly market e-alert and secure report access

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Our Mission: supporting a profitable, sustainable and socially responsible future for the seafood industry