

The Grocer

Focus On: Fish by Carina Perkins (Carina.Perkins@thegrocer.co.uk)

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The story

Fish is flying in UK! Combined sales of fresh and frozen are in solid growth and, crucially, the market doesn't appear to be suffering from the same sort of price deflation impacting the meat sector right now. Only canned and ambient fish is struggling. What's driving the overall growth? Why are shoppers canning ambient fish? Why are prices holding steady? And how are the types of fish Brits buy changing?

Key themes:

Chilled/ fresh: This sector is doing well. What's driving this? To what extent is this being driven by range extensions? Which new products have hit the market in the past year? Are shoppers switching to fresh fish from frozen or are they eating less meat and poultry in favour of fish?

Frozen: In Frozen, volume and value are up. What are players doing to keep shoppers buying frozen fish? What can brands do to justify their space in the freezers?

Ambient: Prices are sinking in tinned fish as brands do battle with own label and slash prices. Can anything be done to safeguard the value of the canned fish category or are players now committed to a race to the bottom in terms of price? To what extent is this market being impacted by the growth of the discounters?

Retailers: Central to this feature will be a discussion of how different retailers are approaching this category in terms of branded and own label ranging, fresh fish counters, range rationalisation and so on. In particular, how the multiple grocers are seeking to compete with competition from the discounters, which are in massive growth, particularly in fresh fish. Also, which supers are cutting branded ranges and replacing with own label?

Discounters: This feature will investigate how competition from the discounters is affecting fish sales in the multiples. Waitrose and the hard discounters have seen the strongest growth in most sectors. What products and strategies have they used to grow sales? What are the others doing to recoup their share of the market?

The environmental impact of fishing: This feature will explore how environmental issues are affecting the availability and types of fish on sale in the supermarkets. Does this have anything to do with why cod and mackerel prices falling while haddock's is growing? We also look at fishing in Norway's frozen north, and how the fish stocks here are changing due to climate change.

Price/promotions: This feature will investigate how big a part price promotions have played in the market over the past year. Is '3 for £10' still a popular promotional strategy for fresh fish for example? In recent years many retailers have expanded this to include smoked fish and fish pie mix, instead of just salmon steaks. Which retailers are using strategies such as this?

Sub sectors/species: This feature will look at how consumer trends such as health are affecting sales in this market. How do sales of fish compare with sales of other protein sources, such as meat and poultry? Within each fish sector (chilled, frozen and ambient) we will discuss the balance between own label and branded, looking at what retailers and brands have been doing to boost sales. Which species are growing/declining in popularity?

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest players have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Innovation: Key to this feature will be a discussion of the latest NPD from the category's brands and own label players, large and small. The feature will explore the market trends that have inspired these innovations and weigh up which new launches are most likely to encourage new trends in the market. We will profile four of the most interesting new launches in a separate innovation panel.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?