

# The Grocer

**Focus On: Fish by Kevin White (Kevin.White@thegrocer.co.uk )**

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**Submissions deadline:** 20 October

## The Story

**Britain is eating more fish, just. Combined volume sales of fresh, frozen and ambient fish have increased in the past year, while value sales have flown 4.8% to nearly £3.3bn as prices have risen across all sectors. What's pushing prices up? What's convincing shoppers that fish is still worth paying that little bit more for? Which sectors – fresh, frozen or ambient – are performing best and why?**

## 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, value is up but volumes are falling. Why? What are players doing to keep shoppers buying frozen fish? Why are brands losing share to own label? What can they do to justify their space in the freezers? Are retailers swapping frozen fish for more profitable frozen foods such as ice creams?

**Ambient:** Following years of price deflation, the average price of ambient fish has risen in the past year. Why? How has this affected shopper numbers? Why are brands in such steep decline in this sector? Why is own label in such strong, double digit growth?

**Retailers:** How are different retailers approaching this category in terms of branded and own label ranging, fresh fish counters, range rationalisation and so on. We are particularly interested in how the multiple grocers are seeking to compete with competition from the discounters, particularly in fresh fish.

**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?

**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.