

# The Grocer

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

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**Submissions deadline:** 26 October 2015

## The Story

**Fish is in fine fettle. Overall take home sales of fish have risen and volumes are up in the past year. Crucially, and unusually in the current deflationary environment, average prices are rising in fish. Why is this? Which fish sectors are in the best shape? Which are struggling? And what factors are affecting the market?**

## Key themes:

**Chilled/ fresh:** This sector is doing well, with every sub sector bar breaded fresh fish in value growth. What's driving this and why are prices rising? 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?

**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. We are particularly interested in how the multiple grocers are seeking to compete with competition from the discounters, which are in massive growth, particularly in fresh fish. As own label is so dominant in this sector, we need to know how own label ranges have been extended in the past year.

**Frozen:** In Frozen, volume and value sales are down. What are brands doing to keep shoppers buying frozen fish? Have fishfinger producers been expanding into new areas of frozen? What else is driving the overall lacklustre performance of frozen fish and what can be done to turn things around? It's noteworthy that prices are up in frozen fish; what's being done to add value to frozen fish?

**Ambient:** Prices are sinking fast 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?

**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:** 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.

**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.

**Smoked fish:** Smoked fish is in strong growth. What's driving this growth and which retailers are cashing in? What's being done to sustain the growth? Is it all smoked salmon or are other species getting in on the action?

**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?
- We profile four new products or product ranges that have ideally not appeared in The Grocer before, including launch date and RSP.