



Bord Iascaigh Mhara
Irish Sea Fisheries Board

UK Crab Market

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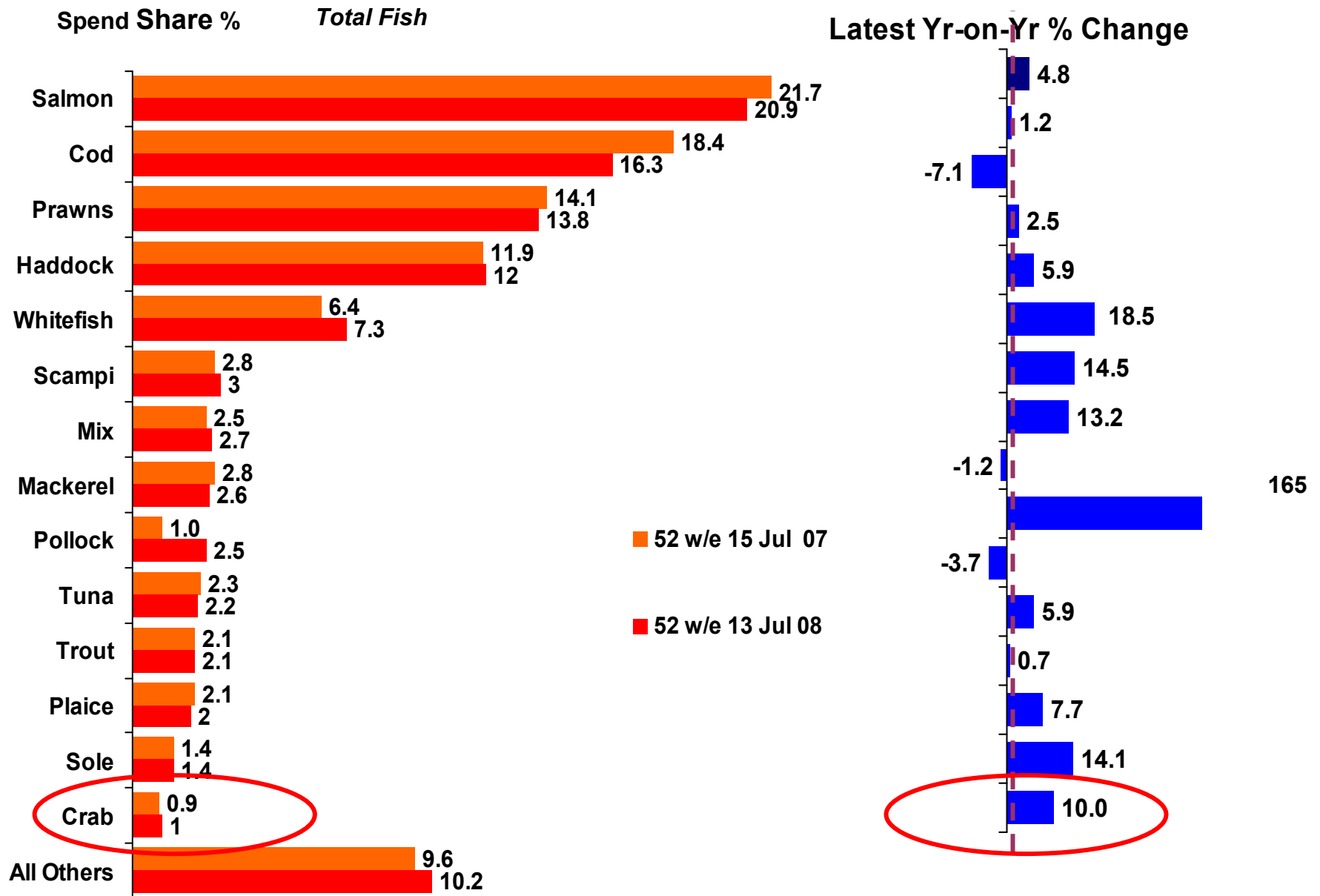


UK Retail Seafood Market

- The Total UK retail fish market is worth £2.1Bn.
- It is growing by 4.8% Yr/Yr in value terms due to shoppers buying more often.
- 63% of Fish is sold Fresh, and 84% is Pre-Packed.
- Tesco and Sainsbury's are the biggest seafood retailers, followed by Morrison's and Asda.

UK Retail Crab Market

Top Fish Species Spend Share % and Yr/Yr Chg%



UK Crab Market

- Total UK Crab market is worth approx £15 million.
- The crab speciality market is worth £ 10.5 million.
This is divided into Fresh £9.9 million & Frozen £600,000.

Speciality includes everything except whole crab products. This includes ready meals (worth £489,000) crab cakes, claws, meat, also fingers, bites and other breaded crab products.

- The market for whole crab is worth £ 4.6 million
- Crab market has low penetration – Approx 2%
- Average spend on crab is of £7.23
- Growth of approx 10% per year. Small market but many opportunities – particularly for premium products.

Seafood Trends

- Increased demand for premium products.
- Also increased demand for value for many products due to current economic climate.
- Provenance is becoming an increasingly strong selling point.
- Rise in smaller retail pack sizes – suitable for 1 – 2 person households or 1 serving.
- Constantly evolving market for value added products as many customers do not wish to handle or prepare products.

Product Analysis

Mark's and Spencer's



Provenance labelling and imagery

Mark's and Spencer's



Value added, ready to eat product – Claws with dip (150g)
Different flavoured dip could easily be changed to extend range.

Waitrose



Innovation - Prawns & crab meat offering



Sainsbury's



Crab meat product with mousse.
Provenance Labelling and Processing – ‘Hand Picked’
Premium price point.

Whole food's



Provenance Labelling and Processing – ‘Hand Picked’
Packaging could be improved upon. Unappealing and cannot be resealed which
Will limit customer appeal. 250g pack is also quite large for 1 – 2 people.