



# BIM

Ireland's  
Seafood  
Development  
Agency

# HOW IS THE IRISH FISH MARKET PERFORMING?

## DATA TO 1ST JANUARY 2017

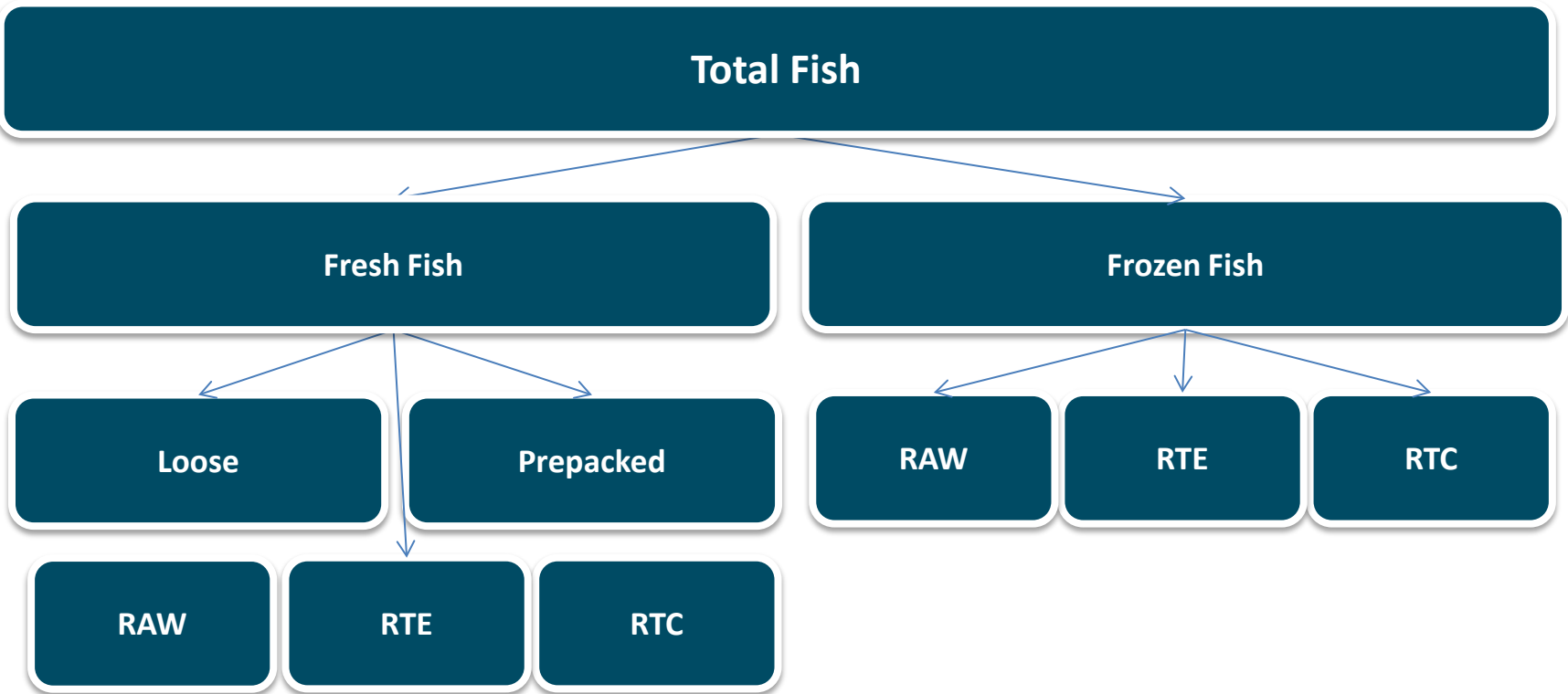
Source: Kantar Worldpanel. Data to 1st  
January 2017



# Contents

Definitions	
Total Fish	How does fish's performance compare to other proteins and who is a typical fish shopper?
Frozen Fish	Overview of the drivers of Frozen Fish's performance and a look at Branded vs PL and retailer performance
Fresh Fish	Overview of the drivers of Fresh Fish's performance looking at Prepacked vs. Loose and Raw vs. RTE, species and retailers
Focus on...	Coated Fish, Ready Meals, Prawns, Mussels

# Definitions of the Category & Sub-Categories



**RTE:** Fish which can be unpackaged and consumed immediately

**RTC** Fish which has been prepared to provide final product for the consumer and is ready to cook

**Raw** Fish which needs heat applied to it before eating



# Definitions of the Sectors

Sector	Definition	Includes/Excludes
Total Fish	All Fish – Fresh and Frozen excluding ambient fish	All Fish – Fresh and Frozen excluding ambient fish
Coated	All Breaded Fillets, Battered Fillets, Dusted Fillets including all Breaded, Battered & Dusted Whole Shellfish including Tempura Prawns	Excludes Breaded & Battered with Sauce, breaded & battered fingers, bites, goujons, cakes etc, filo prawns and breaded/battered fish with chips/potato and smoked coated fish
Fish Cakes/ Burgers	All breaded/battered/dusted/seeded fish cakes and fish burgers even those with sauce in the middle of them	Excludes any options with other proteins/carbohydrates and smoked fish cakes/burgers
Fish Fingers/ Goujons	All breaded/battered/dusted/seeded fish fingers and fish goujons	Excludes any options with other proteins/carbohydrates and smoked fish fingers/goujons
Fish Bites/ Crunchies	All breaded/battered/dusted/seeded fish bites, nuggets, shapes, croquettes, dippers and crunchies. Also popcorn prawns	Excludes any options with other proteins/carbohydrates and smoked fish bites/crunchies
Flavouring/ Marinade	All fish and shellfish with flavouring/butter/marinade/topping/glaze/dressing/ vinegarette that is not a complete ready meal	Excludes fish and shellfish with sauce and smoked fish with flavouring/marinade
Flavouring/ Marinade Smoked	All fish and shellfish with flavouring/butter/marinade/topping/glaze/dressing/ vinegarette that is not a complete ready meal made with smoked fish	Excludes fish and shellfish with sauce and products with flavouring/marinade that do not use smoked fish

Sector	Definition	Includes/Excludes
Natural	All natural raw fillets of fish and shellfish without any sauce/butter/ marinades/ crumb/toppings/additions	
Other	All value added fish and shellfish that is not a main meal or with sauce such as Kievs, Spring rolls, parcels, filo prawns, prawn toast, starters for fish, shellfish, tartlets, wellington, terrine, dressed crab/lobster, dinner food excl carbohydrate, fish with toppings, sausages, tartlets, appetisers, party food	
Ready Meals	All complete fish and shellfish ready meals (with carbohydrate/vegetables)	Excludes separate dinner components such as quiche, Kiev, mornays or any starter type products where smoked fish is not the main ingredient
Smoked	All natural smoked fish including BBQ fish	Excludes any smoked fish with flavouring/marinade, smoked coated fish, smoked fish with sauce or smoked fish as the main ingredient in fish cakes/burgers, ready meals and other
Scampi	All scampi products either wholetail langoustine or reformed scampi with whitefish	
Surimi	All surimi products	
Sushi	All sushi products	
With Sauce	All fish and shellfish with sauce including prawns cocktail with sauce, fish mornays, fish with sauce	Fish and shellfish with marinades, toppings and other flavourings and complete ready meals and does not contain smoked fish as the main ingredient

## Lifestage Definitions

- Pre Family: 1 to 2 person households under 44 years without children
- Young Family: Younger households under 34 years with children
- Middle Family: Families where main shopper is between 34-44 years and they have children
- 45+ Family: Families where main shopper is 45+ years and they have children 15 years and under
- Older Dependents: This is a 45+ year household with 3+ persons in the household (no children)
- Empty Nesters: Older 45+ year households with 1 to 2 people and no kids

\*Please note that Children are defined as being 16 years and under.



## Total Fish



Source: Kantar Worldpanel. Data to 1st  
January 2017



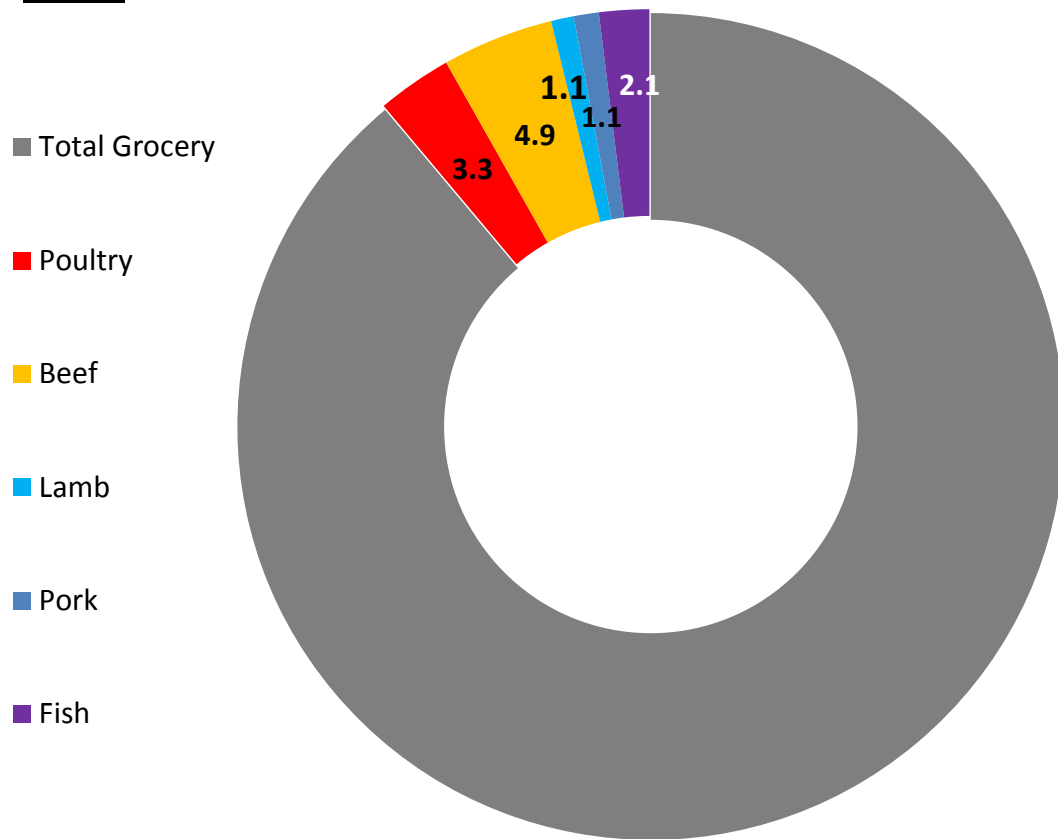


# How much of total grocery does Fish account for?

Fish is growing, but behind Total Market

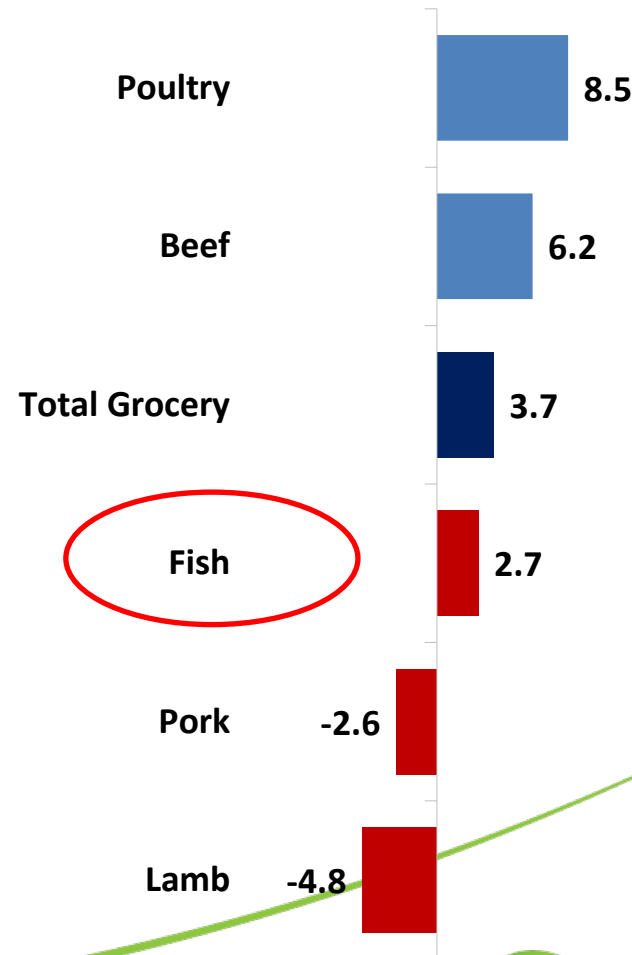
## Fresh & Frozen

Value %



\*Includes Fresh & Frozen Products

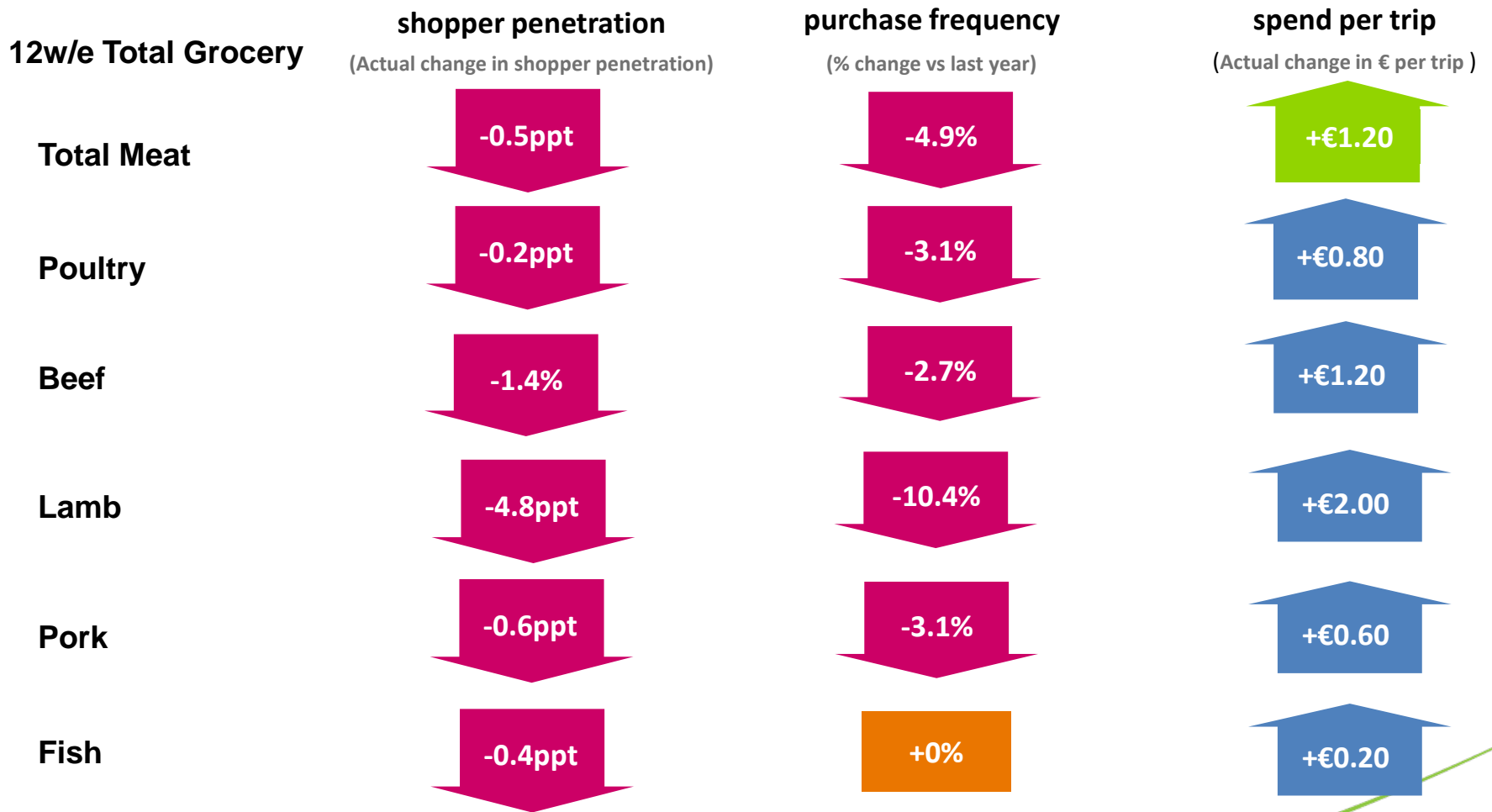
## 52w/e Total Grocery – value % change YoY



Source: Kantar Worldpanel. Data to 1st January 2017



# Protein Drivers of Growth

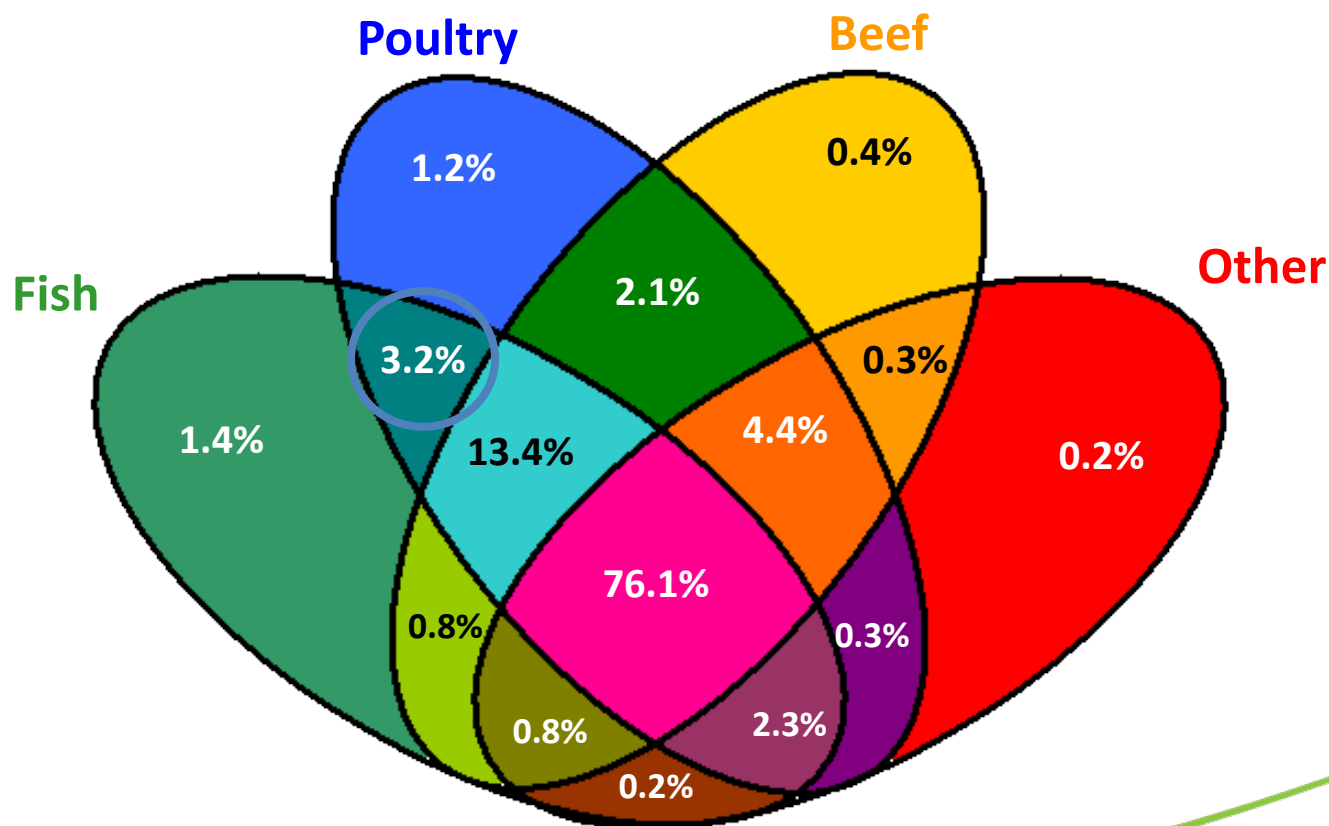


Source: Kantar Worldpanel. Data to 1st  
January 2017



## Protein Overlap

The strongest relationship exists between the white meats.



Market Penetration = 99.7%

Source: Kantar Worldpanel. Data to 1st  
January 2017



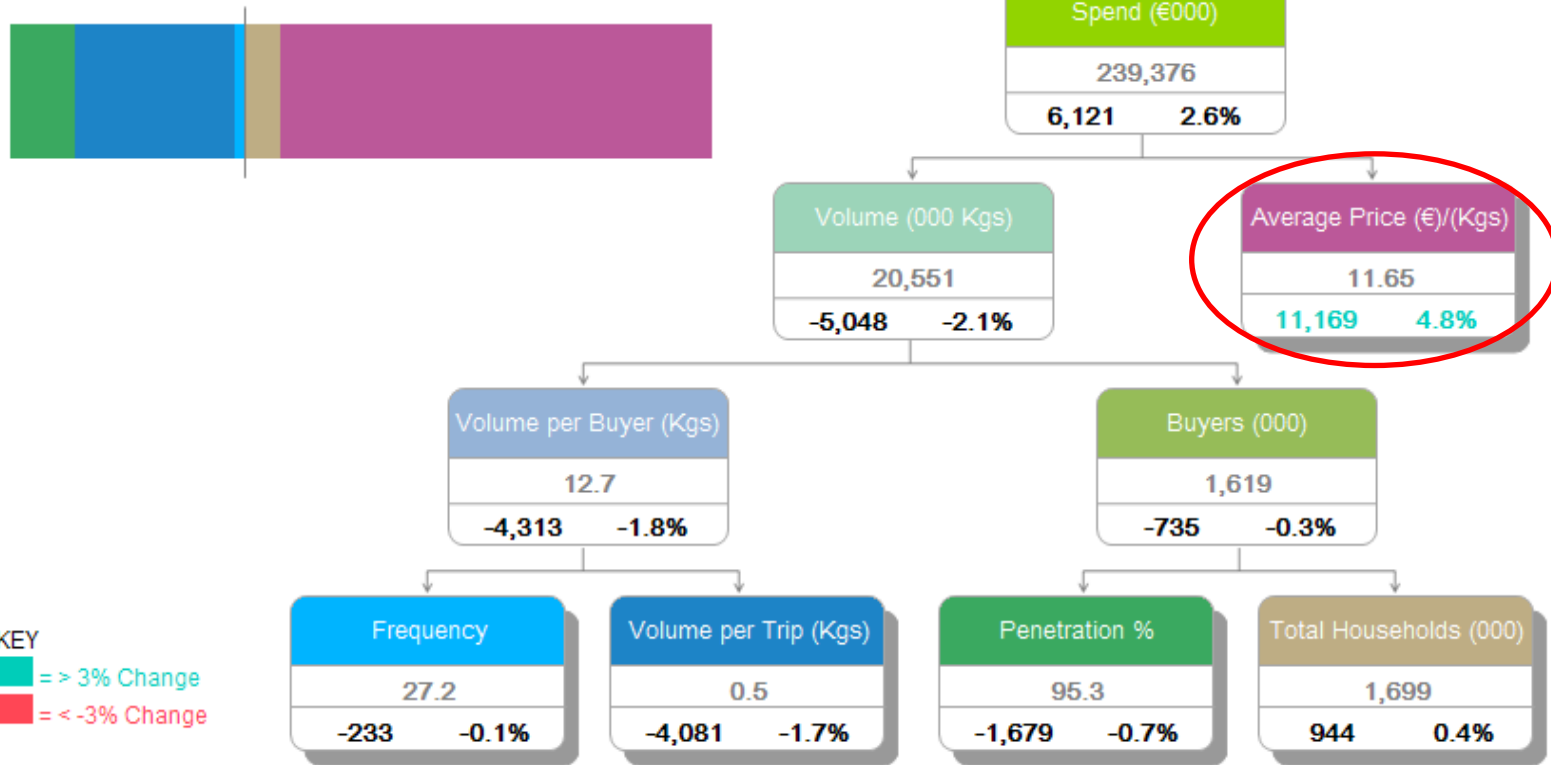
# Total Fish Drivers of Growth

Shoppers buying at higher prices is the main driver of growth for fish market.

01-Jan-17 vs. Previous Year

Total Species | Total Outlets | Total Market | Total Market | 52 w/e | Previous Year

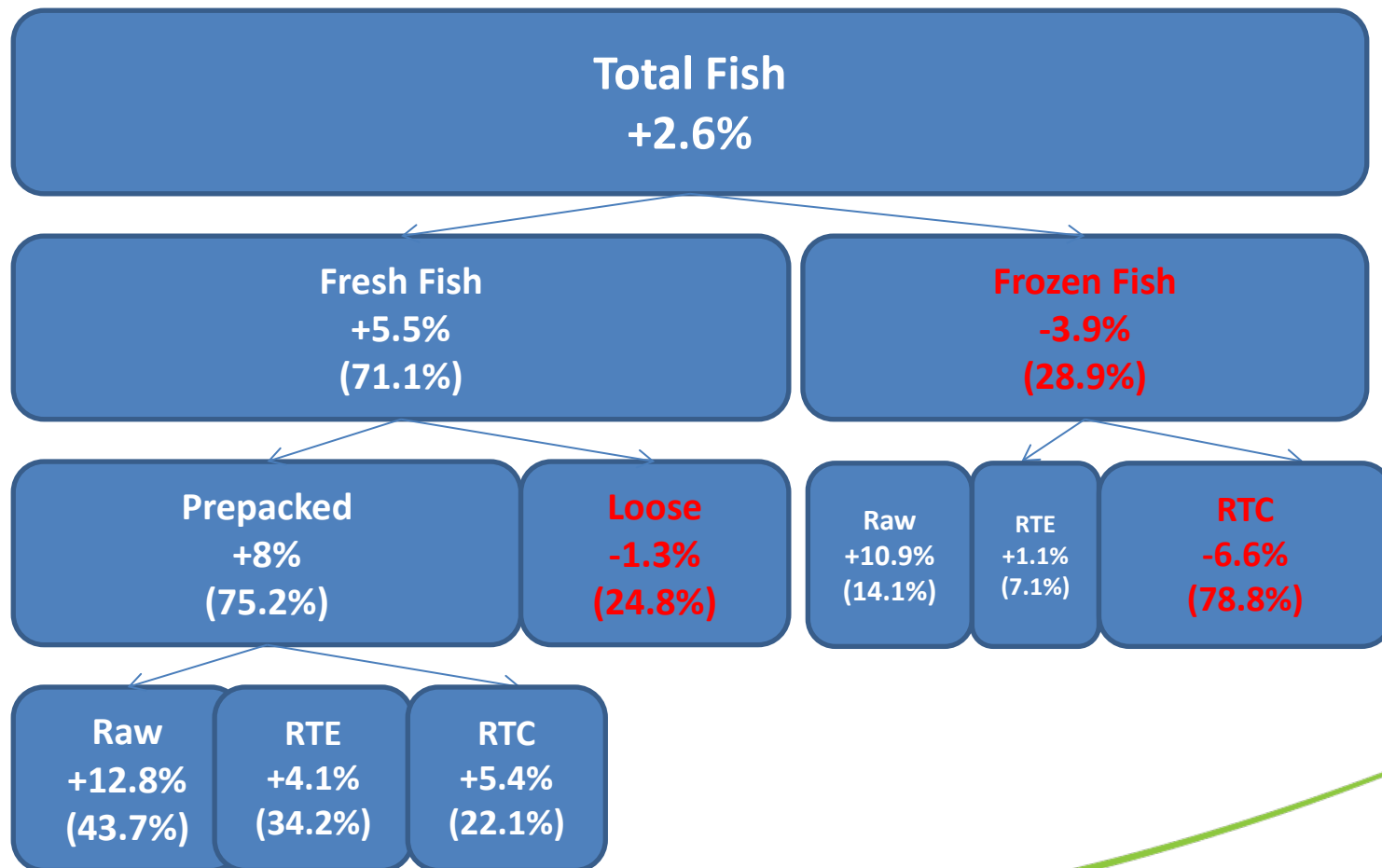
Attribution of Change in Spend



Source: Kantar Worldpanel. Data to 1st January 2017

## Breaking Down the Fish Category's Growth

Value % and Growth YoY



Source: Kantar Worldpanel. Data to 1st  
January 2017



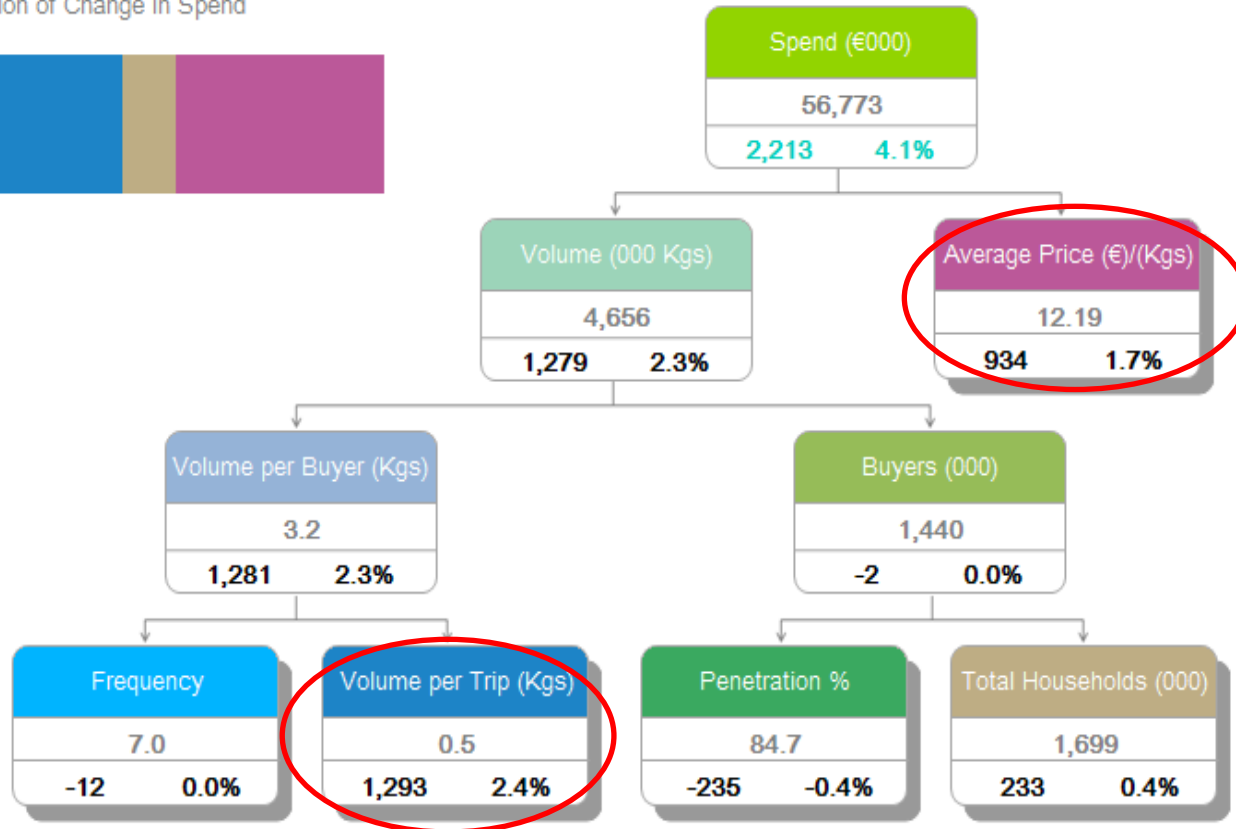
## Total Fish Drivers of Growth

The category has stronger growth over the shorter term, driven by an increase in volume per trip alongside higher prices.

01-Jan-17 vs. Previous Year

Total Species | Total Outlets | Total Market | Total Market | 12 w/e | Previous Year

Attribution of Change in Spend



KEY

■ = > 3% Change

■ = < -3% Change

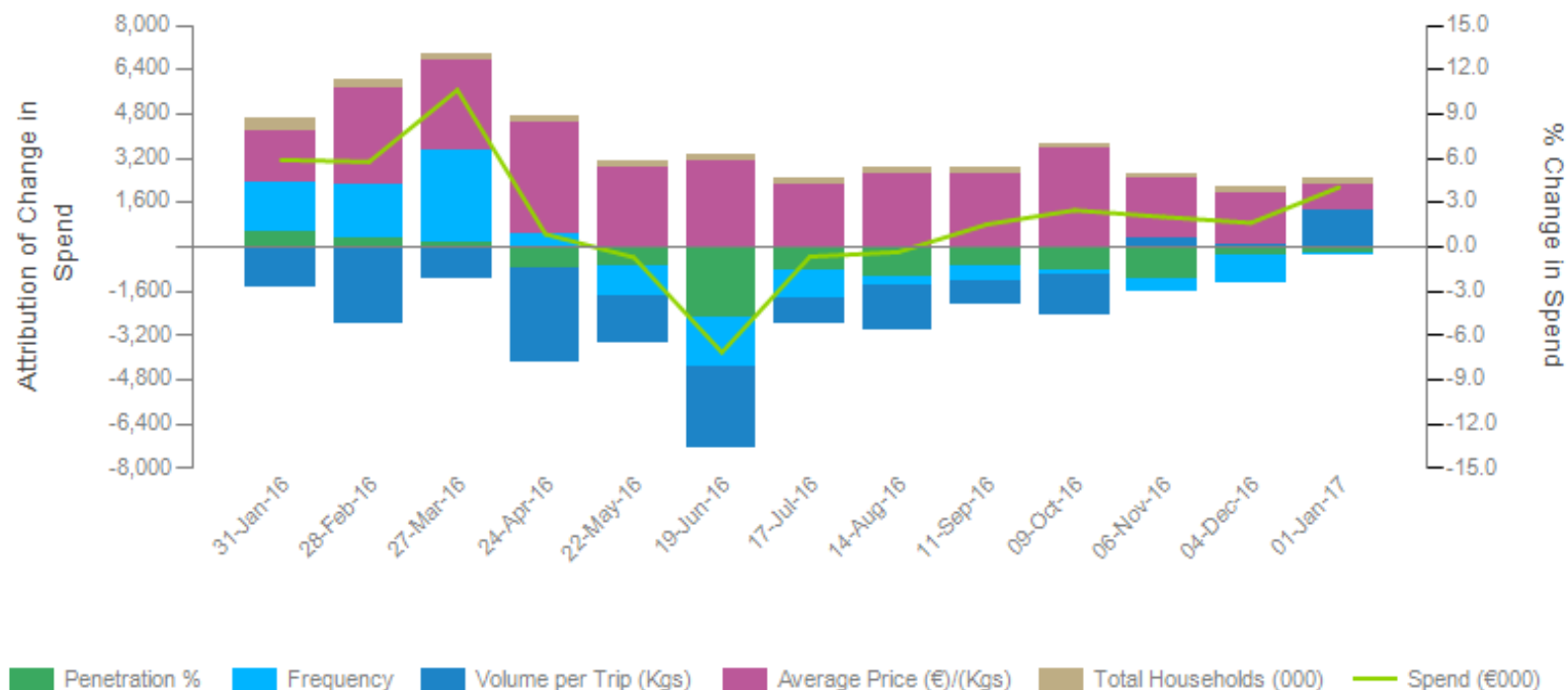
Source: Kantar Worldpanel. Data to 1st  
January 2017

## Total Fish Drivers of Growth Trended

Performance has remained steady, with a slight rise in recent months. Despite the category losing some shoppers, increased volume and price continue to drive growth.

vs. Previous Year

Total Species | Total Outlets | Total Market | Total Market | 12 w/e | Previous Year



Source: Kantar Worldpanel. Data to 1st January 2017

# How much do other proteins cost per KG?

1. Fresh Fish €14.21 per KG



2. Lamb €11.19 per KG



3. Beef €9.14 per KG



4. Frozen Fish €8.01 per KG



5. Pork €6.64 per KG



6. Poultry €5.76 per KG

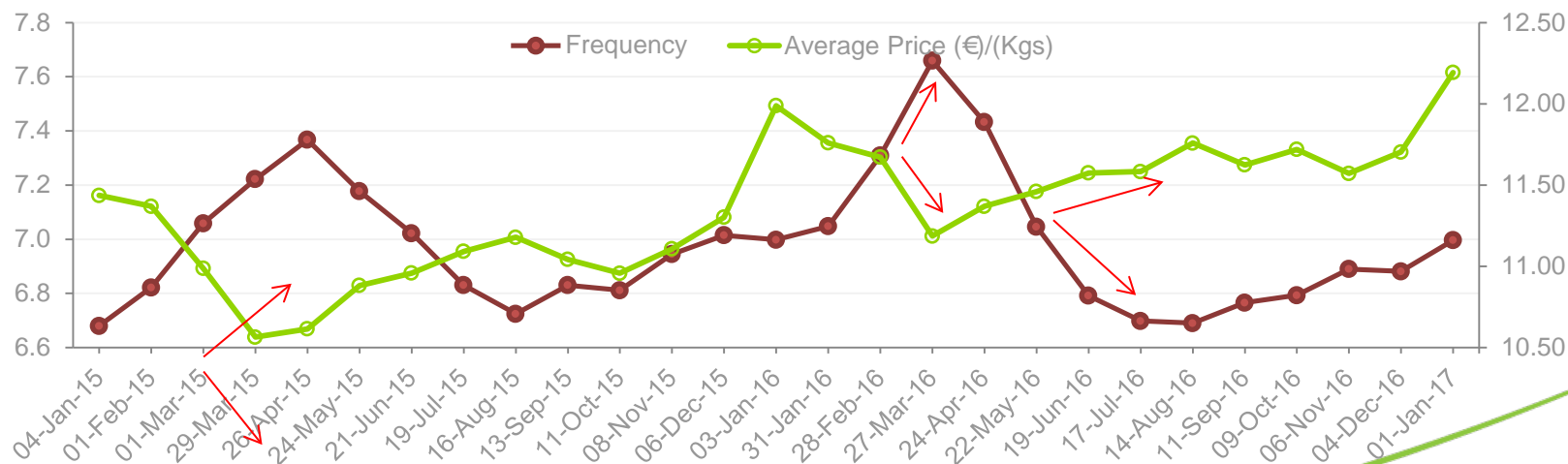
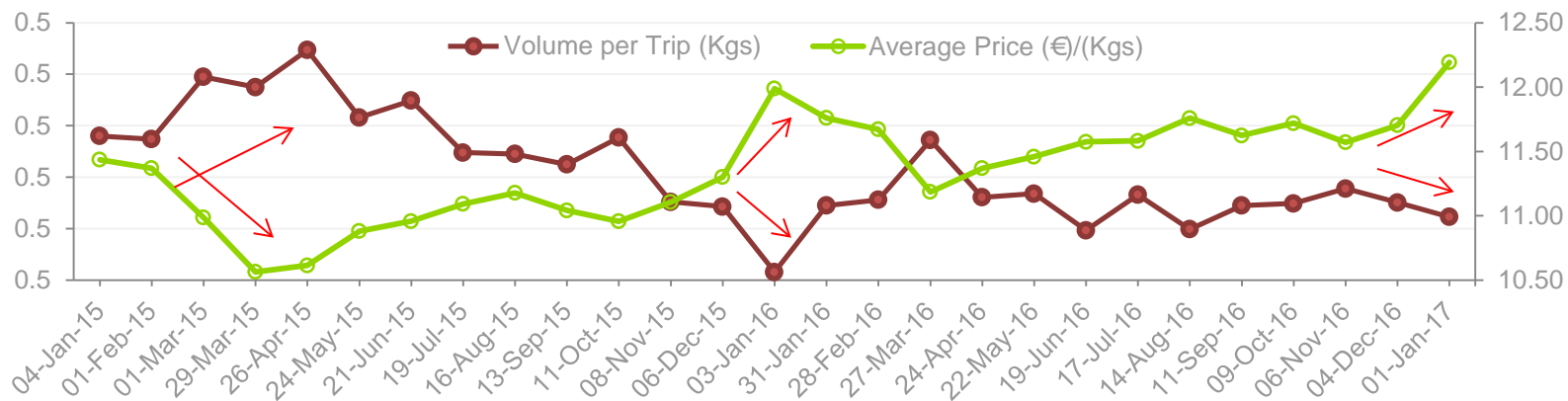


Source: Kantar Worldpanel. Data to 1st  
January 2017



When prices decline, shoppers tend to shop more frequently and pick up more volume when in-store.

Actual | Total Species | Total Outlets | Total Market | Total Market | 12 w/e



Source: Kantar Worldpanel. Data to 1st January 2017

## Lower average prices correspond closely to an increase in shopper numbers.

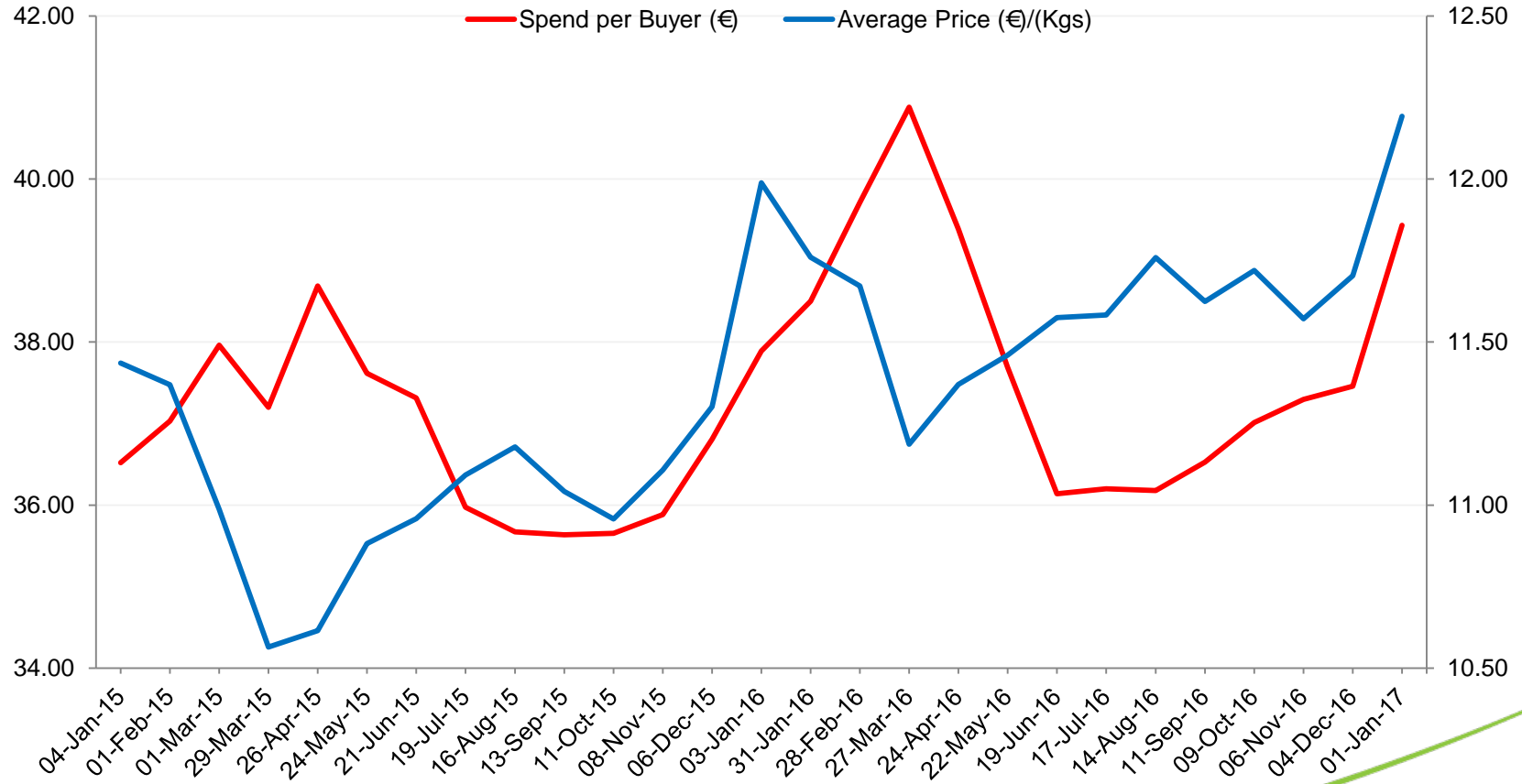
Actual | Total Species | Total Outlets | Total Market | Total Market | 12 w/e



Source: Kantar Worldpanel. Data to 1st January 2017

# What Effects do Higher prices have on shopper behaviour?

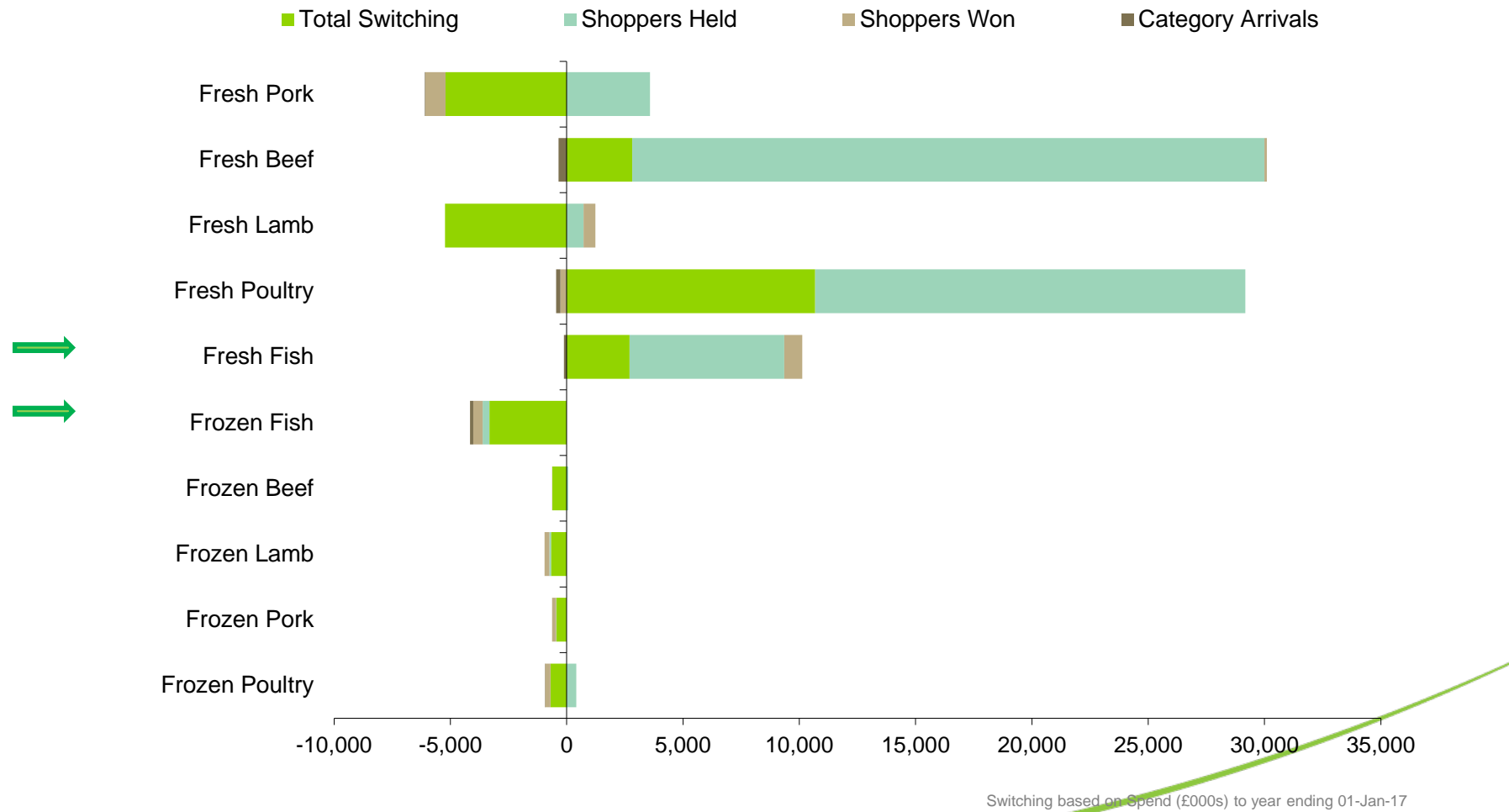
Actual | Total Species | Total Outlets | Total Market | Total Market | 12 w/e



Source: Kantar Worldpanel. Data to 1st January 2017

Fresh Fish has grown through getting existing shoppers to spend more, as well as gaining switch from other meats.

Components of Change



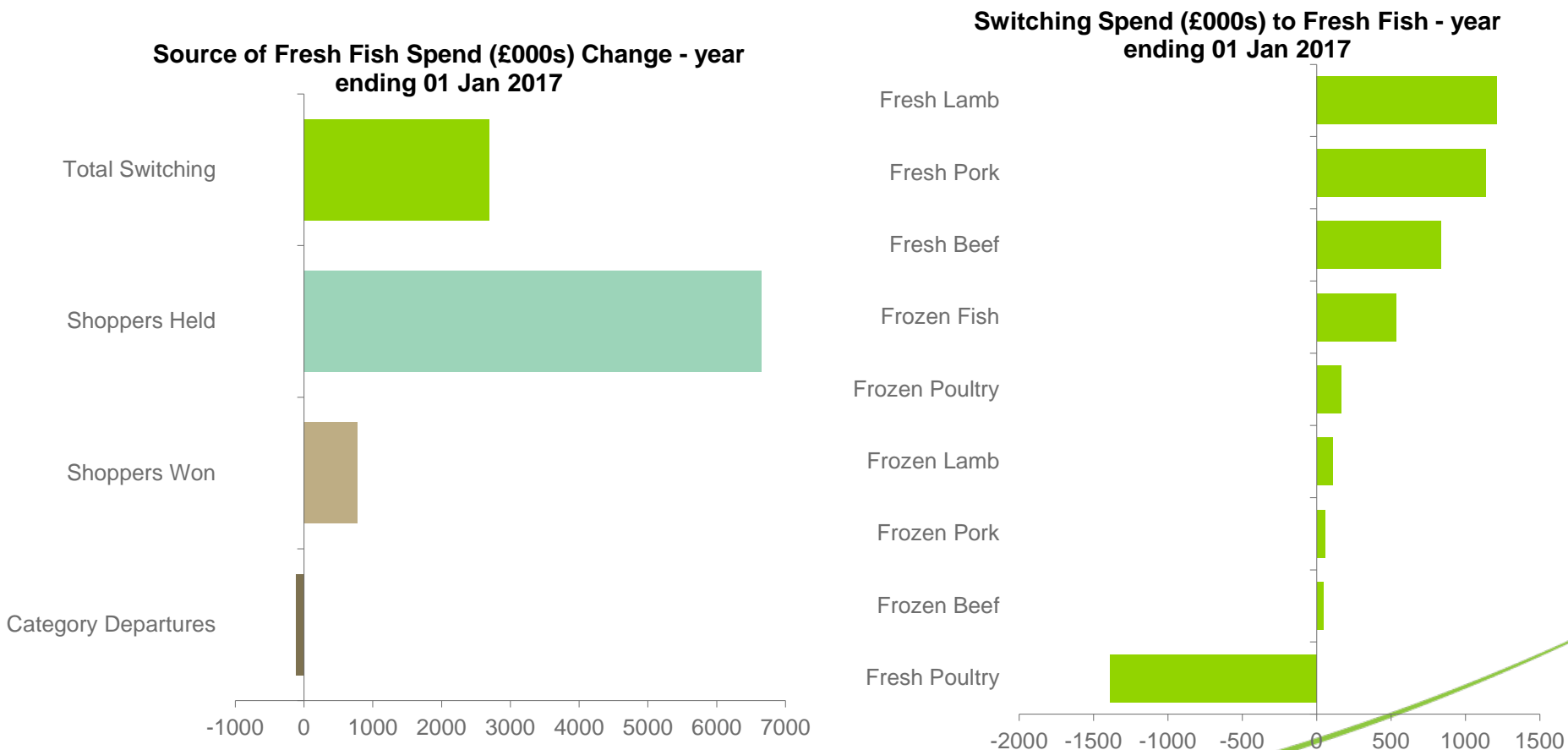
Switching based on Spend (£000s) to year ending 01-Jan-17

Source: Kantar Worldpanel. Data to 1st January 2017



## Fresh Fish Switching

Fresh Fish has won switched spend from all other meat types apart from Fresh Poultry



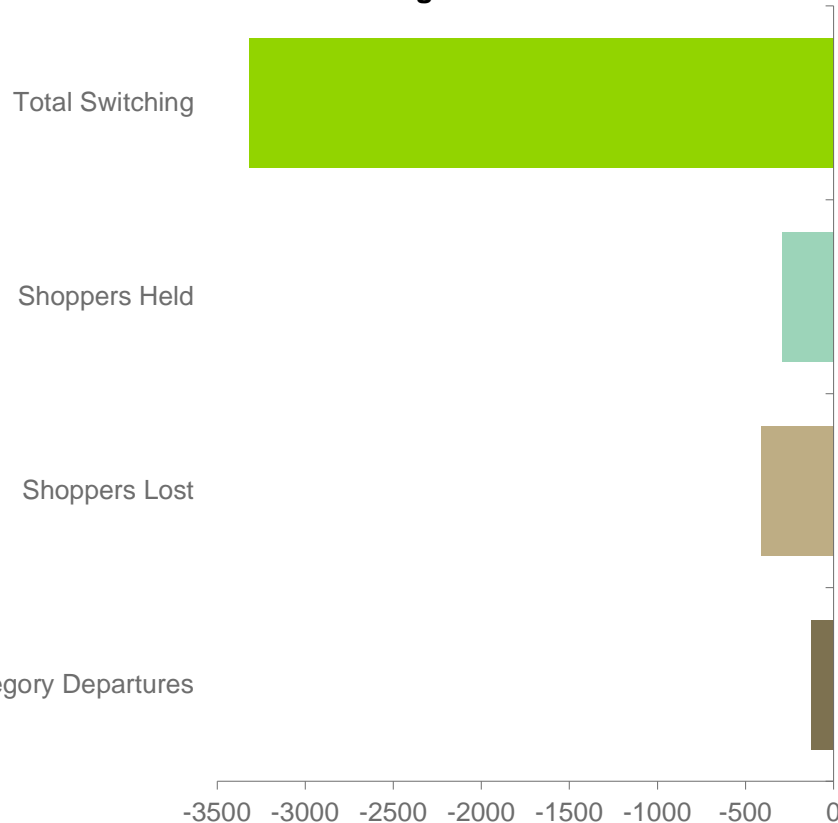
Source: Kantar Worldpanel. Data to 1st January 2017



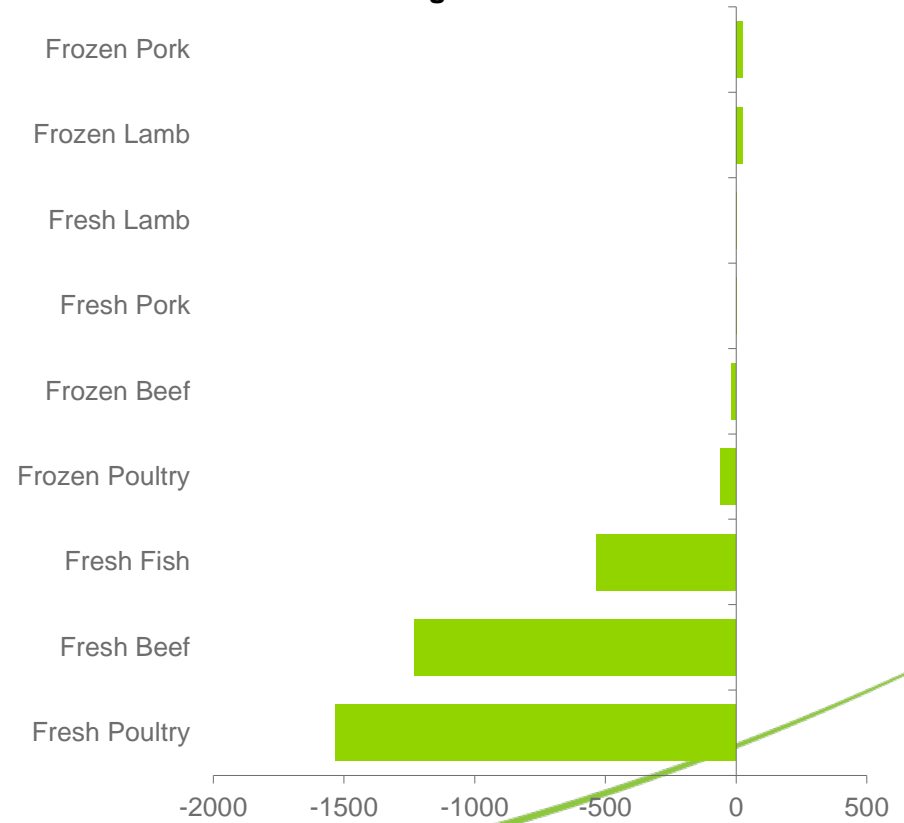
## Frozen Fish Switching

Frozen Fish has lost largest switch spend to Fresh Poultry, also losing a large spend to Fresh Beef and Fresh Fish.

Source of Frozen Fish Spend (£000s) Change - year ending 01 Jan 2017



Switching Spend (£000s) to Frozen Fish - year ending 01 Jan 2017



Source: Kantar Worldpanel. Data to 1st January 2017



# Who is a Seafood shopper?

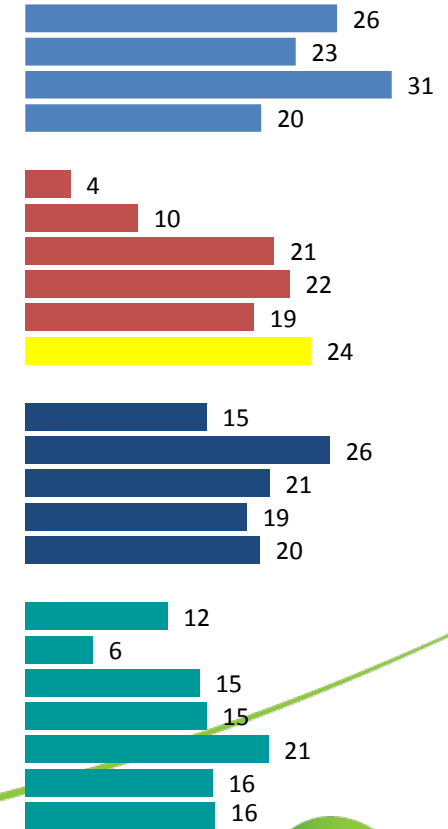
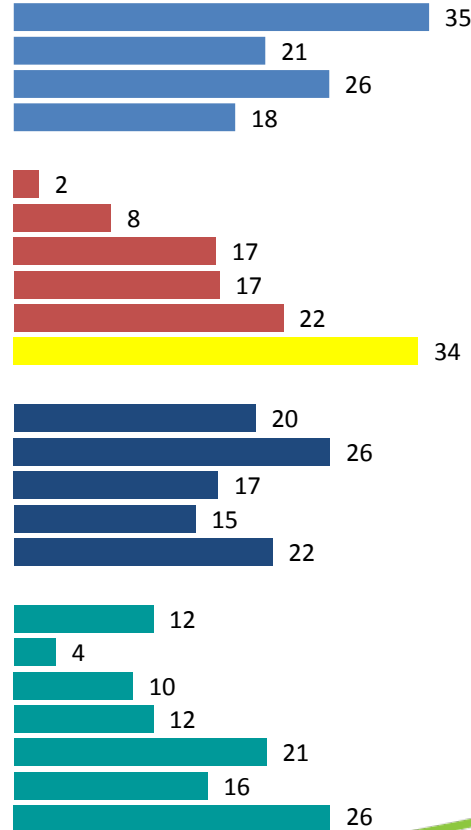
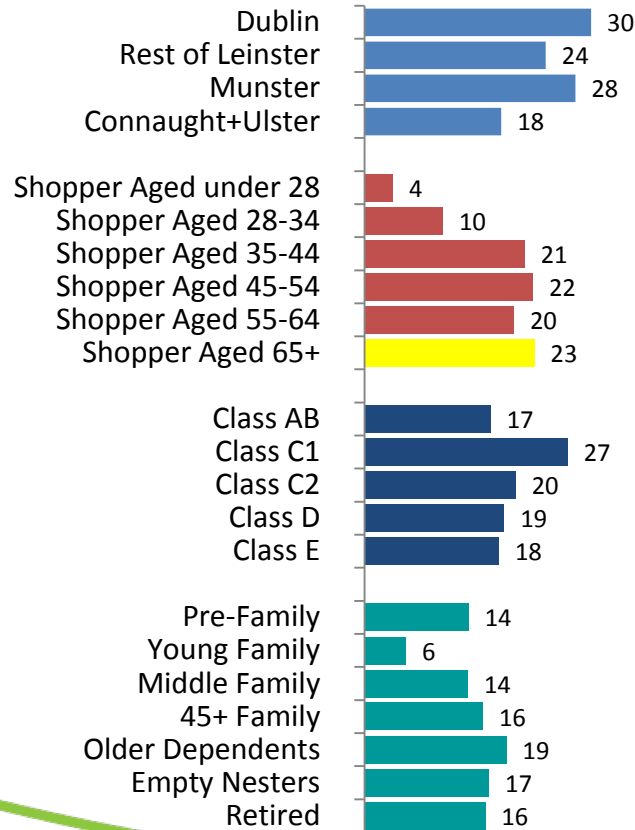


## Value %

## Total Grocery

## Fresh Fish

## Frozen Fish



Source: Kantar Worldpanel. Data to 1st January 2017



# Insight

- Although Fish is in growth, it is growing behind Total Grocery Market.
- Fish is the most expensive protein on the market, and this high average price is the main factor driving its growth.
- Despite prices of both Poultry and Beef increasing this year, they have maintained frequency growth. Meanwhile, Fish has seen a decline in frequency alongside rising prices.
- Lower average prices of Fish coincide with greater volume purchased at a higher frequency.
- Shoppers have continued to switch spend away from other proteins and into Fresh Fish.
- Fish, particularly Fresh Fish, is most popular among older demographics and shoppers in Dublin. Frozen Fish has a wider consumer base in Munster.

Source: Kantar Worldpanel. Data to 1st  
January 2017





# Frozen Fish



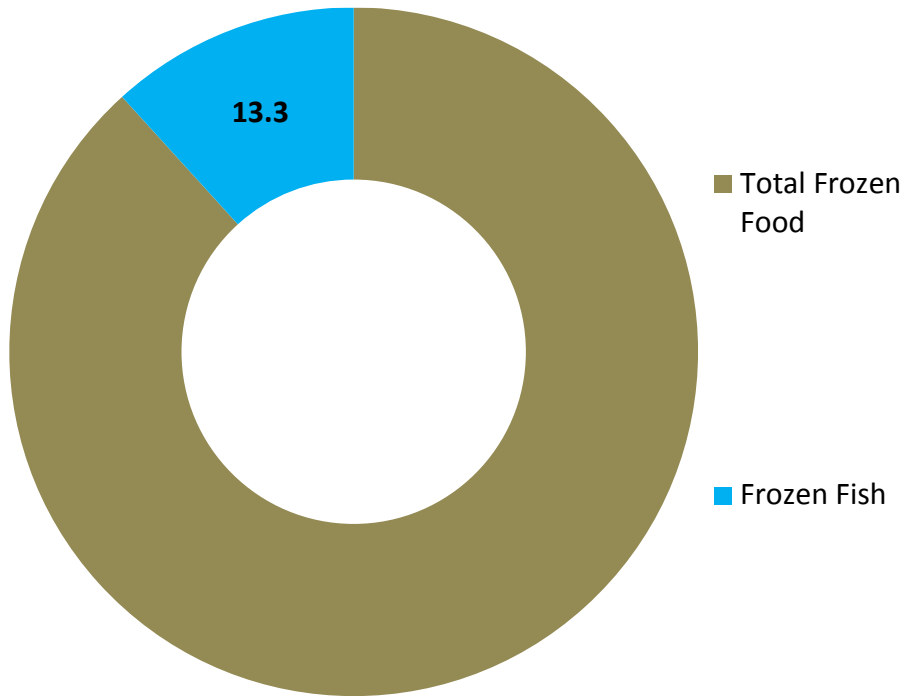
Source: Kantar Worldpanel. Data to 1st  
January 2017



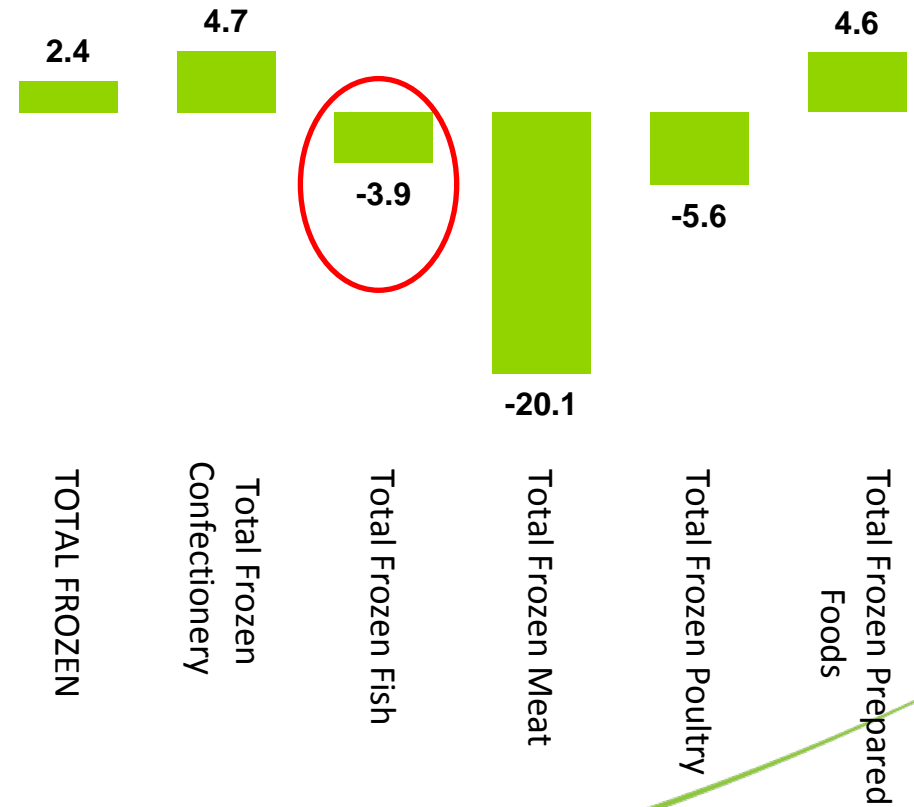
## How does Frozen Fish compare to other Frozen categories?

Frozen Fish is declining ahead of category and so losing share.

Value %



Value Growth YoY



Source: Kantar Worldpanel. Data to 1st January 2017



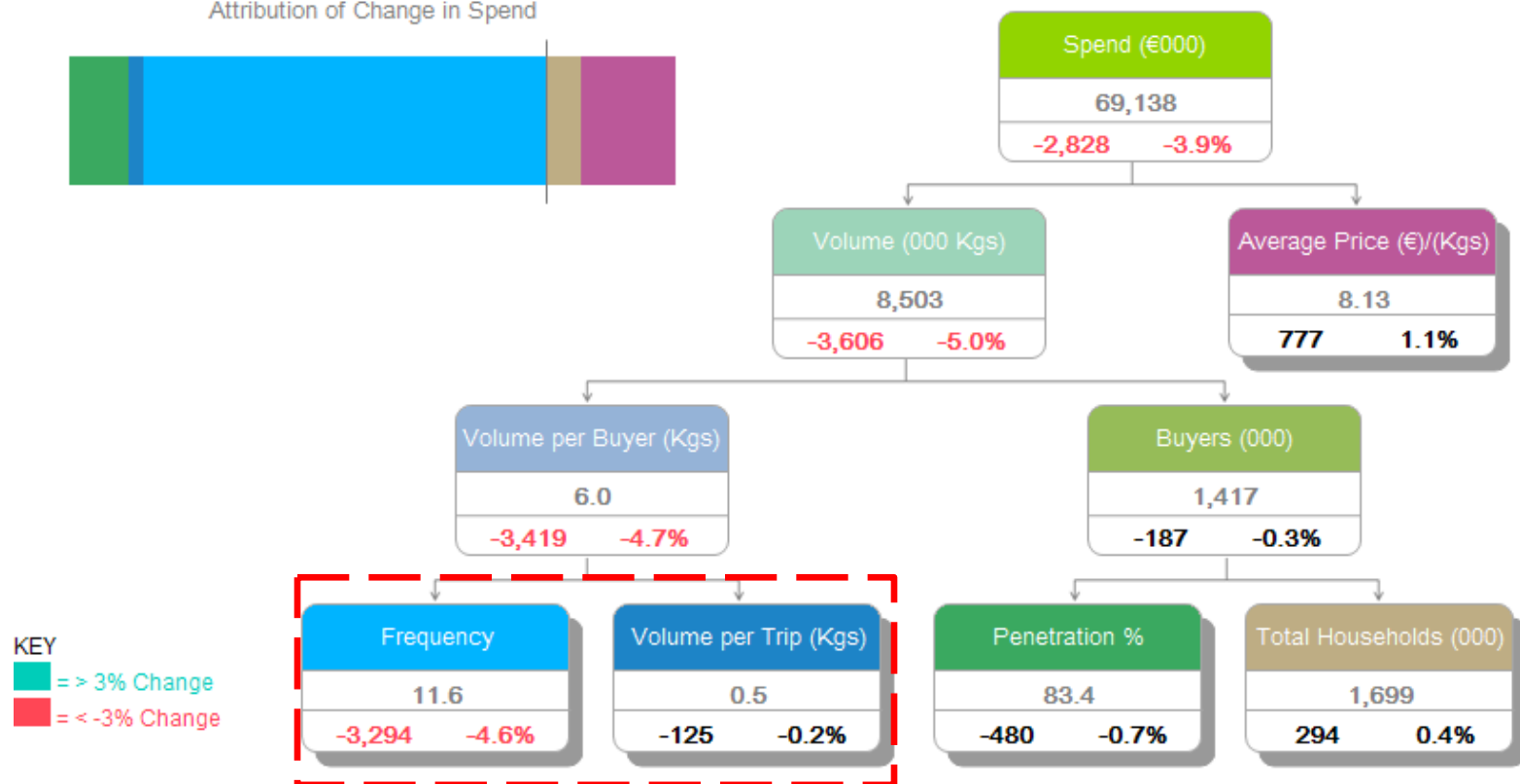
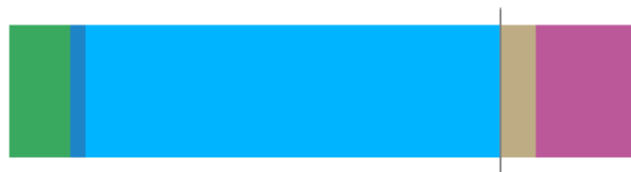
## Frozen Fish Drivers of Decline

Shoppers visiting the category less often and buying less volume when instore are the root causes of the decline in Frozen Fish

01-Jan-17 vs. Previous Year

Frozen | Total Outlets | 52 w/e | Previous Year

Attribution of Change in Spend



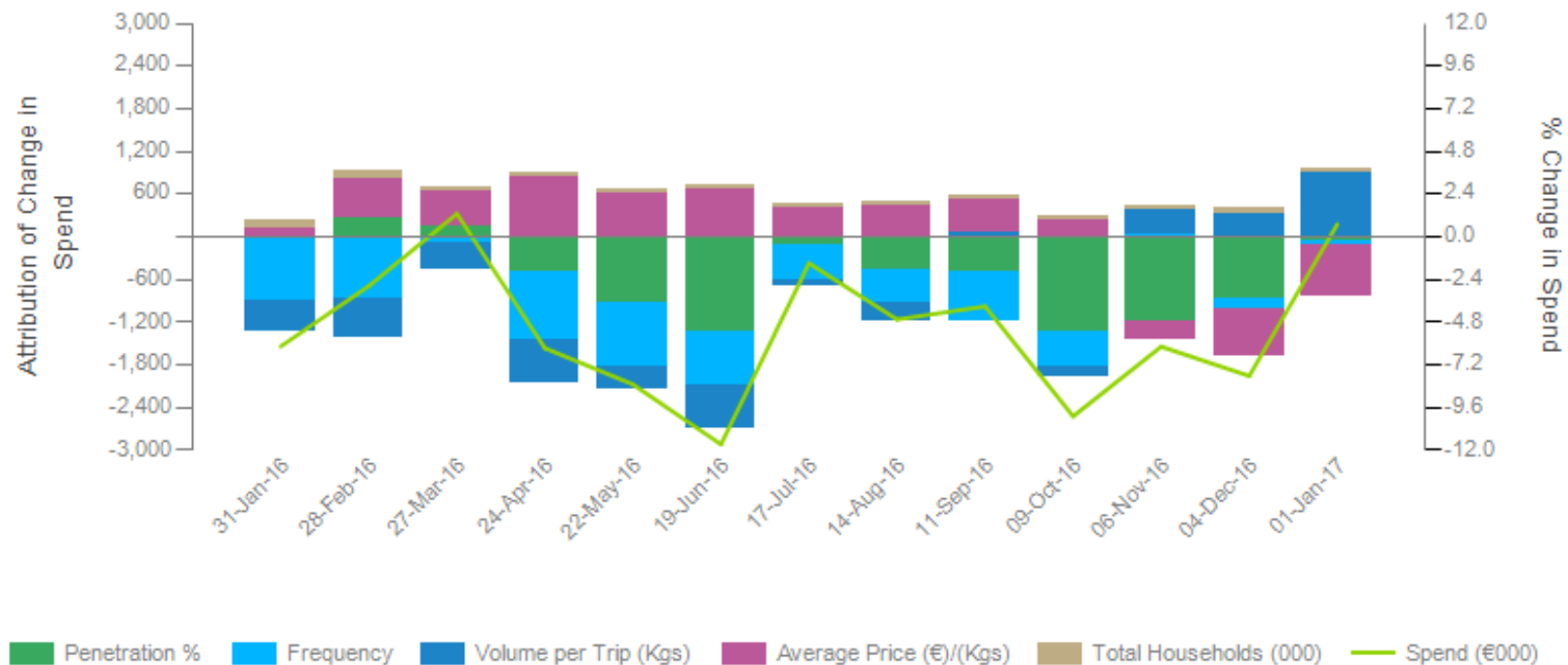
Source: Kantar Worldpanel. Data to 1st January 2017

## Frozen Fish Drivers of Growth Trended

In contrast, the past month has seen some growth in the category, as prices drop and shoppers increase their purchase volume.

vs. Previous Year

Frozen | Total Outlets | 12 w/e | Previous Year

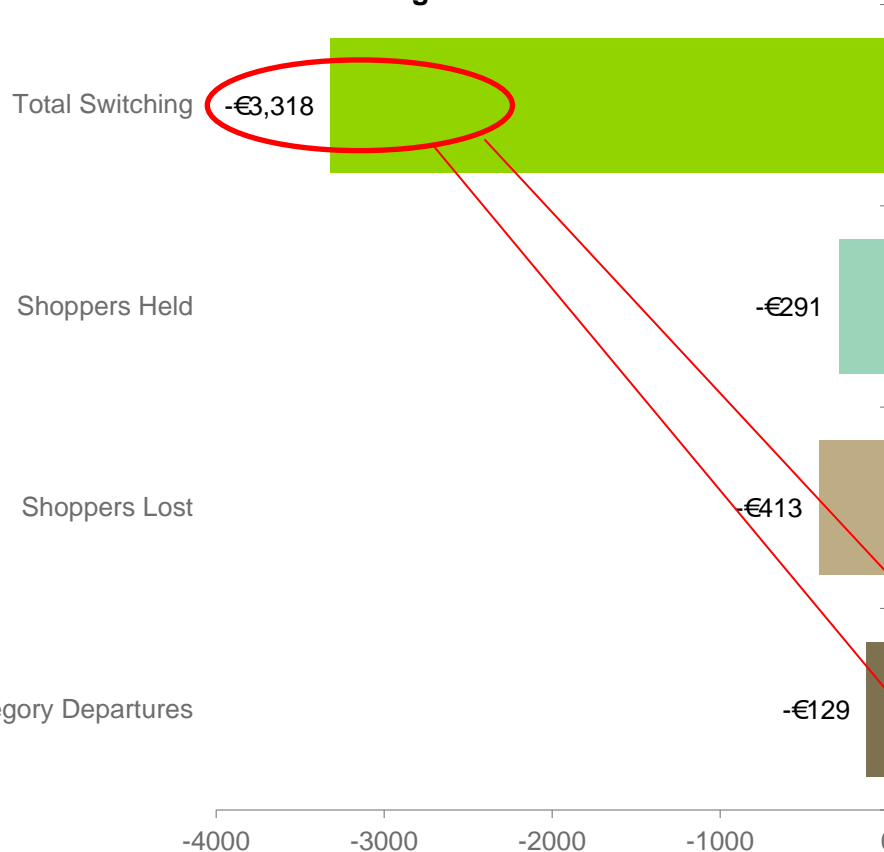


Source: Kantar Worldpanel. Data to 1st January 2017

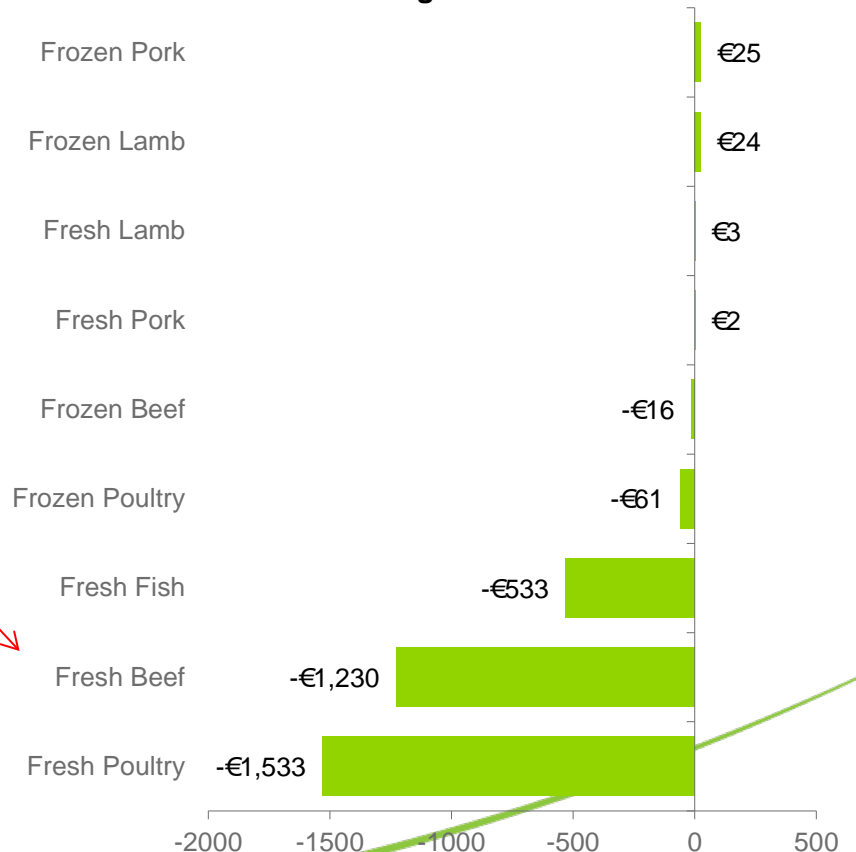
## Frozen Fish Switching

Frozen Fish has lost largest switch spend to Fresh Poultry and Fresh Beef.

Source of Frozen Fish Spend (£000s) Change - year ending 01 Jan 2017



Switching Spend (£000s) to Frozen Fish - year ending 01 Jan 2017



Source: Kantar Worldpanel. Data to 1st January 2017

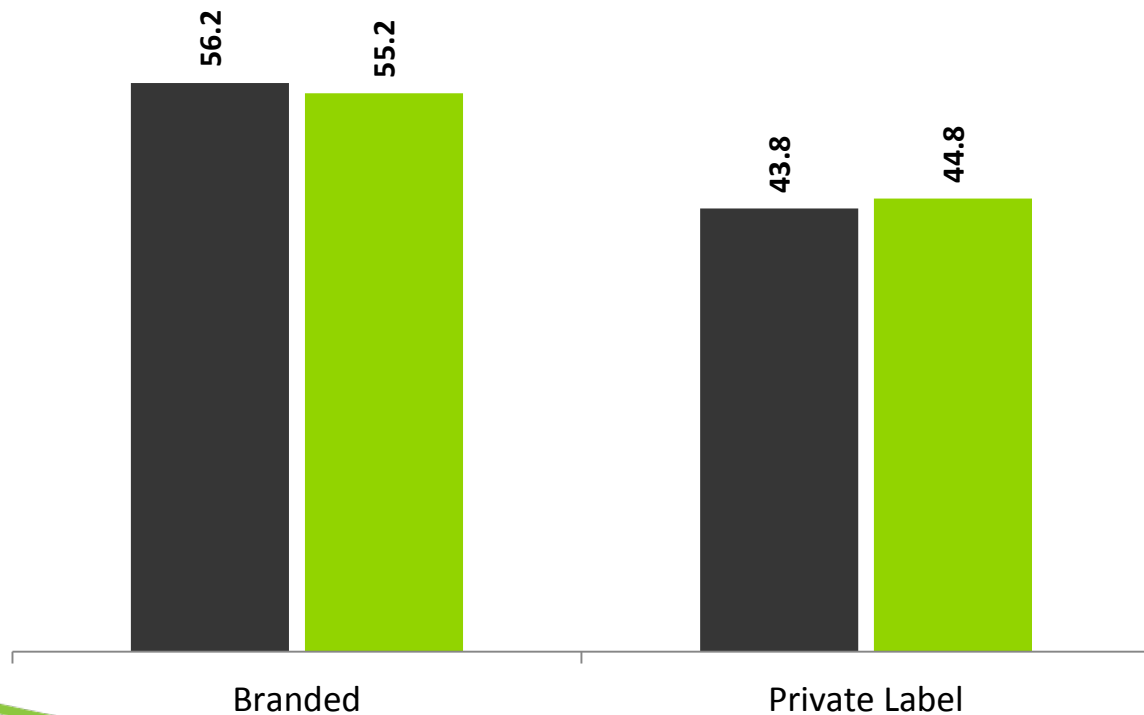


## Frozen Fish Brands Value Share and Change

Branded sales have declined ahead of Private Label sales over the past year, resulting in Branded losing share of the category.

Value %

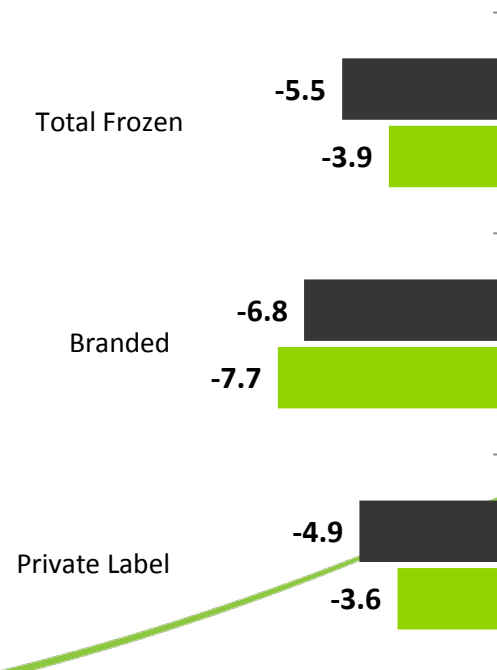
■ 52 w/e 03 Jan 16    ■ 52 w/e 01 Jan 17



Value Growth YoY

■ 2014-2015

■ 2015-2016

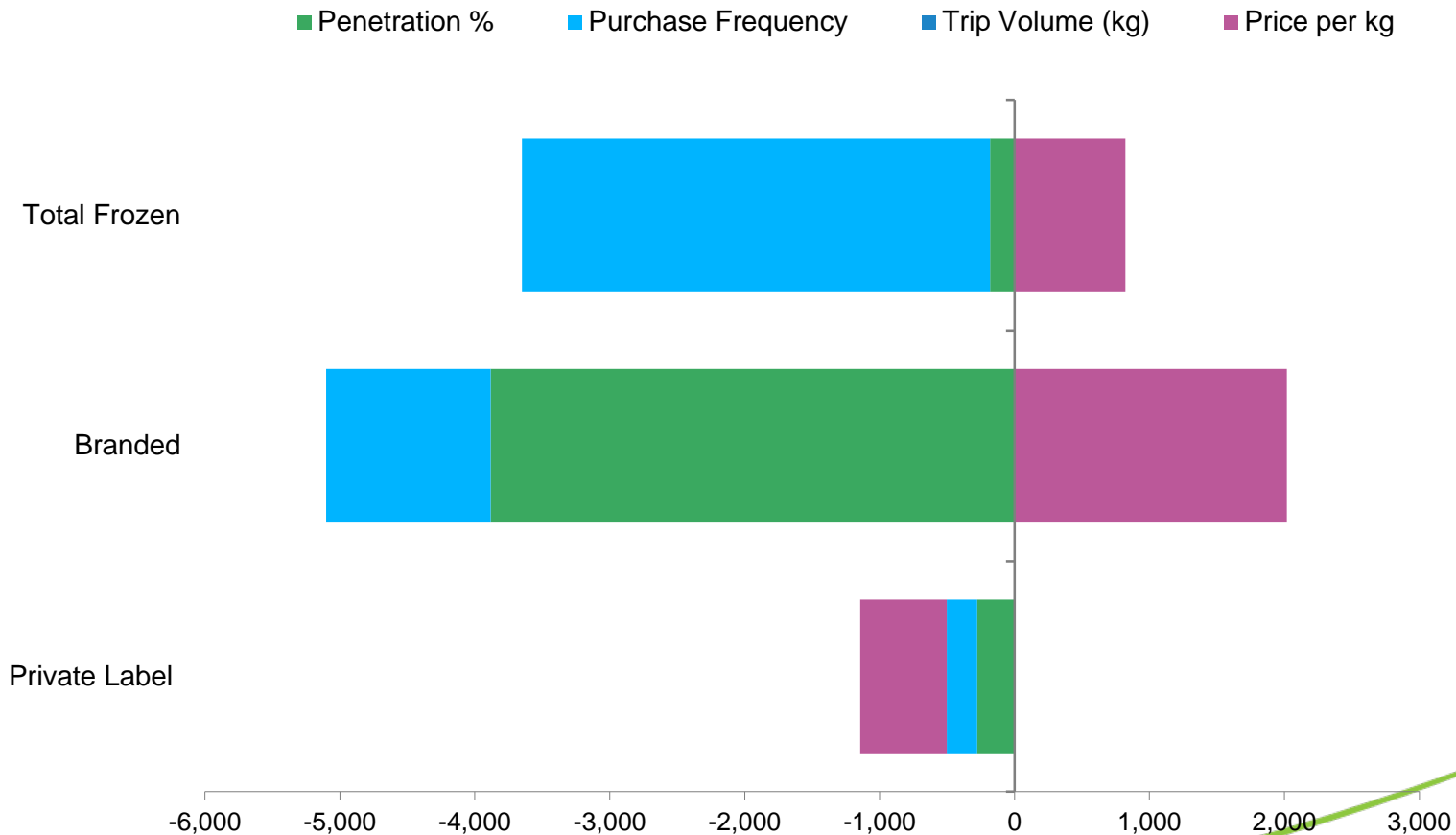


Source: Kantar Worldpanel. Data to 1st January 2017



## Frozen Fish Brands Drivers of Growth or Decline

Average price increases have not helped the frequency decline and loss of shoppers in Branded Frozen.



Source: Kantar Worldpanel. Data to 1st  
January 2017

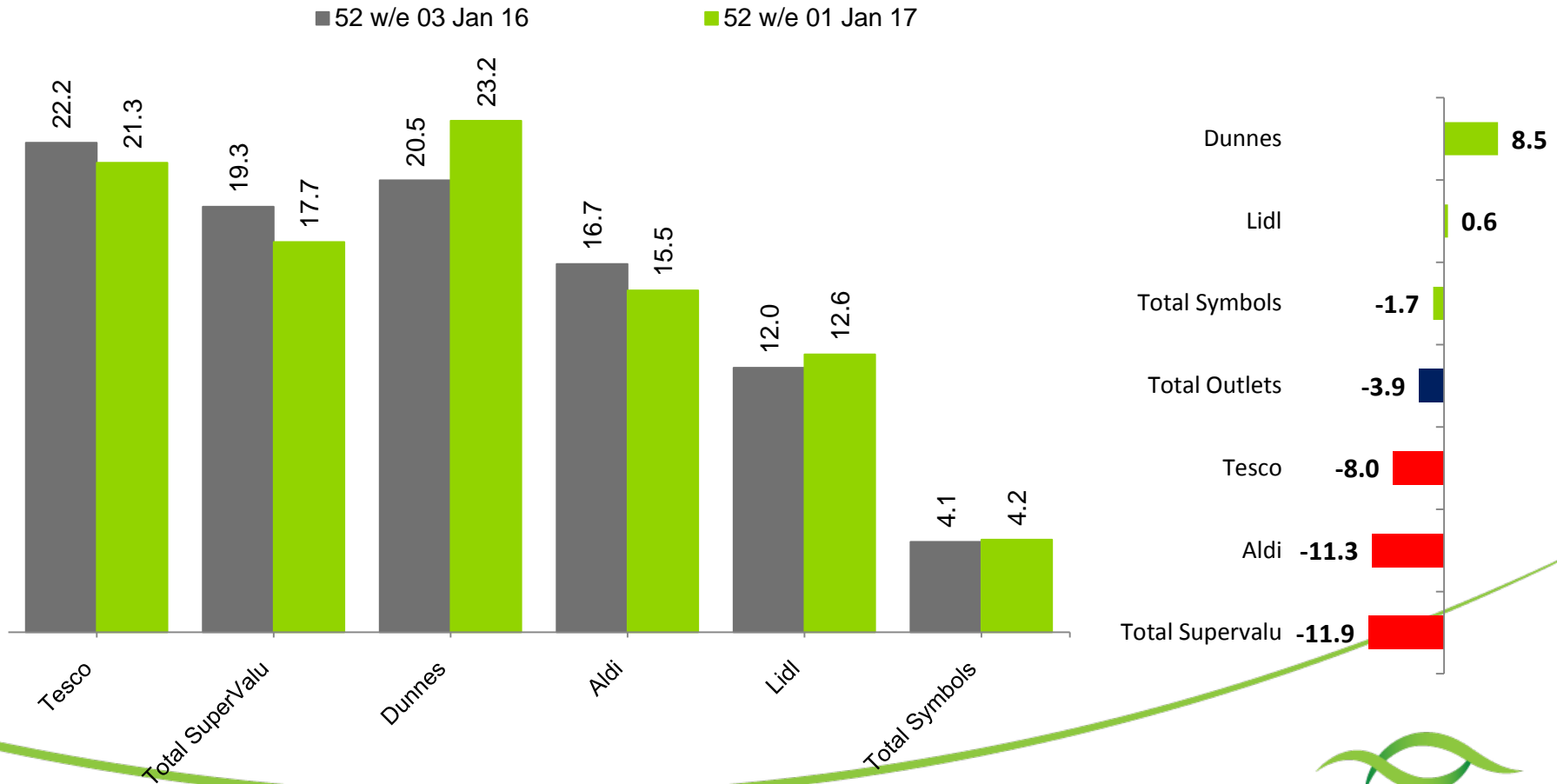


## Frozen Fish Retailers Value Share and Change

Dunnes and Lidl are the only retailers to grow value sales on LY. Dunnes is the market leader thanks to its significant growth.

Value %

Value Growth YoY



Source: Kantar Worldpanel. Data to 1st January 2017



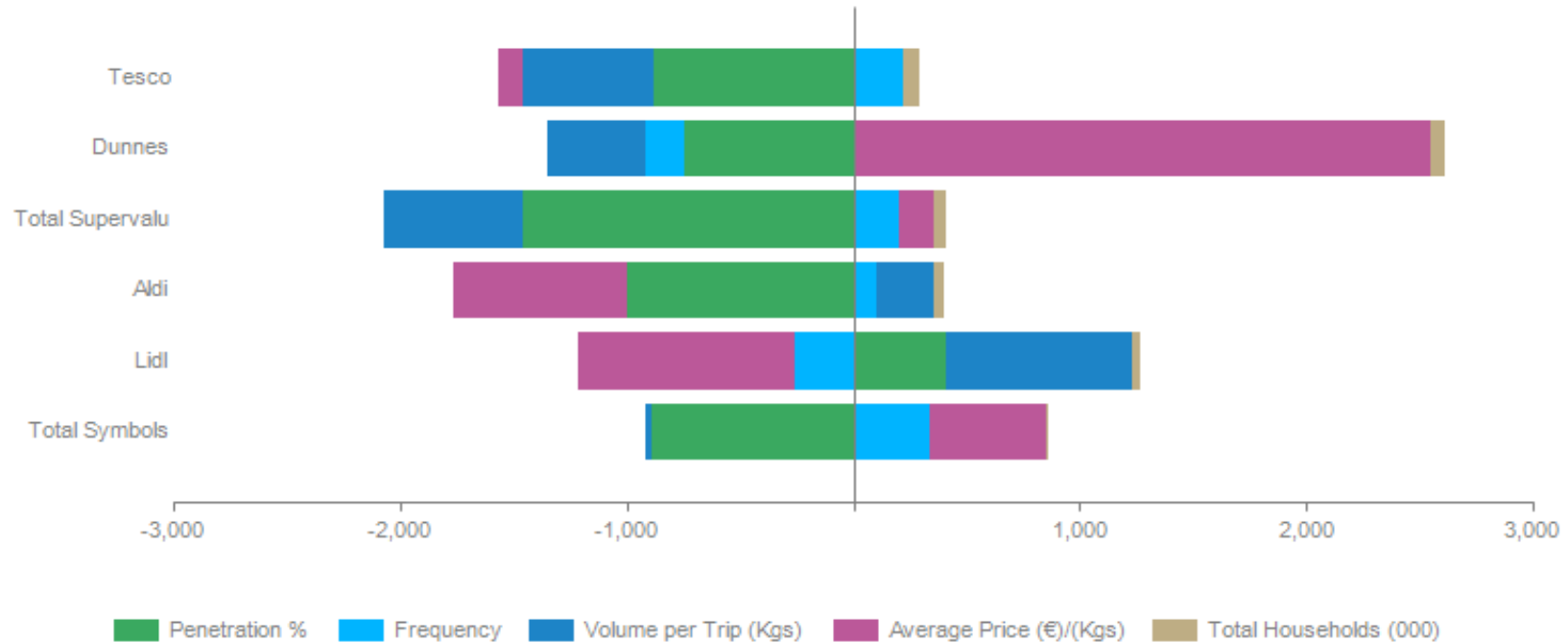


## Frozen Fish Retailers Drivers of Growth or Decline

Despite losing shoppers and existing customers buying less volume, less frequently, Dunnes continues to experience growth, driven primarily by an increase in average prices.

01-Jan-17 vs. Previous Year

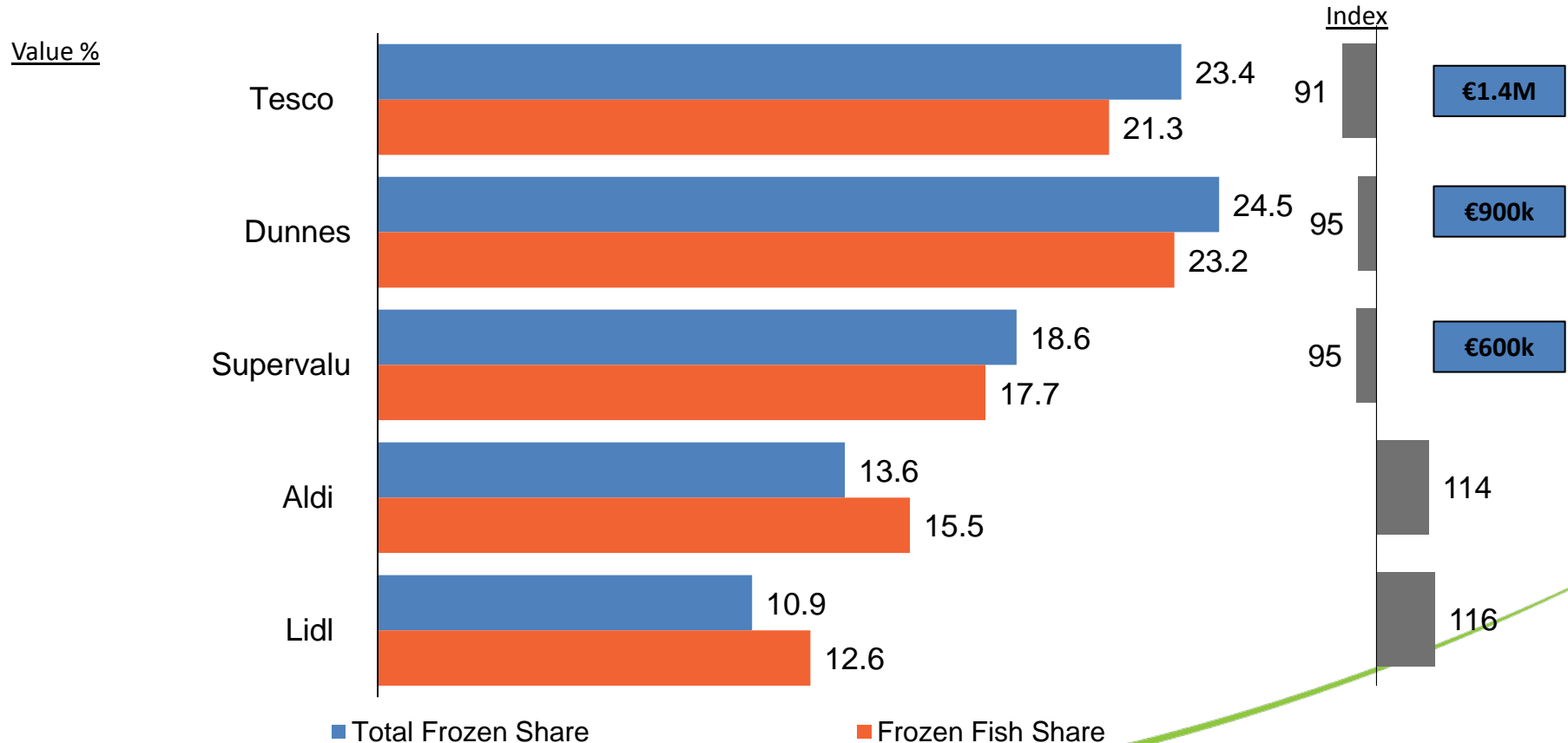
Frozen | 52 w/e | Previous Year



Source: Kantar Worldpanel. Data to 1st  
January 2017

## Retailers Under/Over Trade

Despite strong share growth, there is still headroom for Dunnes to achieve fair share with an opportunity of €900k. If Tesco manages to turn their decline in Frozen Fish around, they have the greatest opportunity of €1.4m.



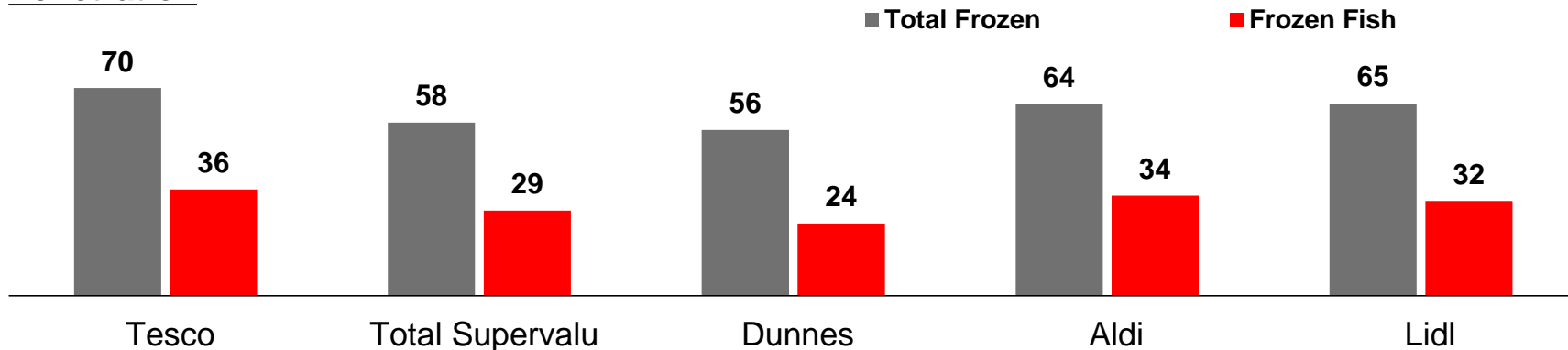
Source: Kantar Worldpanel. Data to 1st January 2017



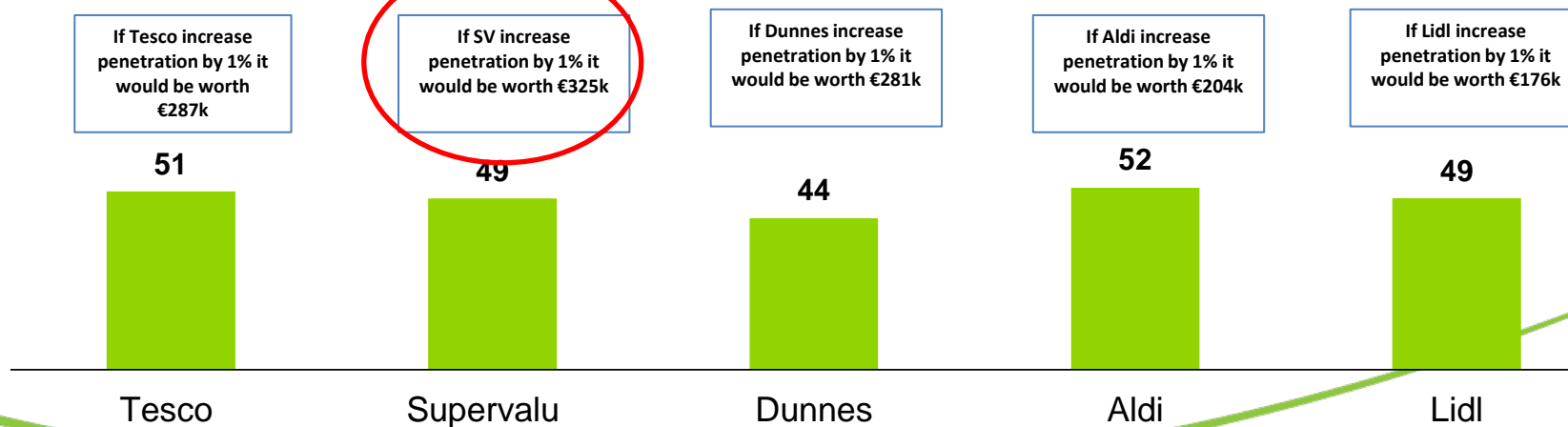
## Retailer Conversion

There is opportunity for each of the retailers to convert more of their shoppers to purchase frozen fish in store.

### Penetration



### Conversion into Frozen Fish



# Insight

- Total Frozen market is gaining share at Total Grocery level. Frozen Fish however, is declining ahead of the overall category, with branded sales declining at a faster rate than private label.
- Dunnes is the only retailer to have made significant growth in the value sales of Frozen Fish on LY. Lidl has also seen some growth in the category.
- The decline of Frozen Fish can be attributed to a rise in consumer health consciousness, as shoppers switch from Frozen to Fresh meats and fish.
- Biggest opportunity for frozen suppliers lies in Dunnes, as the retailer continues to grow the total category, suppliers should look to communicate how they can help close their €900k under-trade in Frozen Fish.
- Opportunity also lies in Tesco. If they could turn their decline in Frozen Fish around, an opportunity of €1.4m exists.

# Fresh Fish



Source: Kantar Worldpanel. Data to 1st  
January 2017

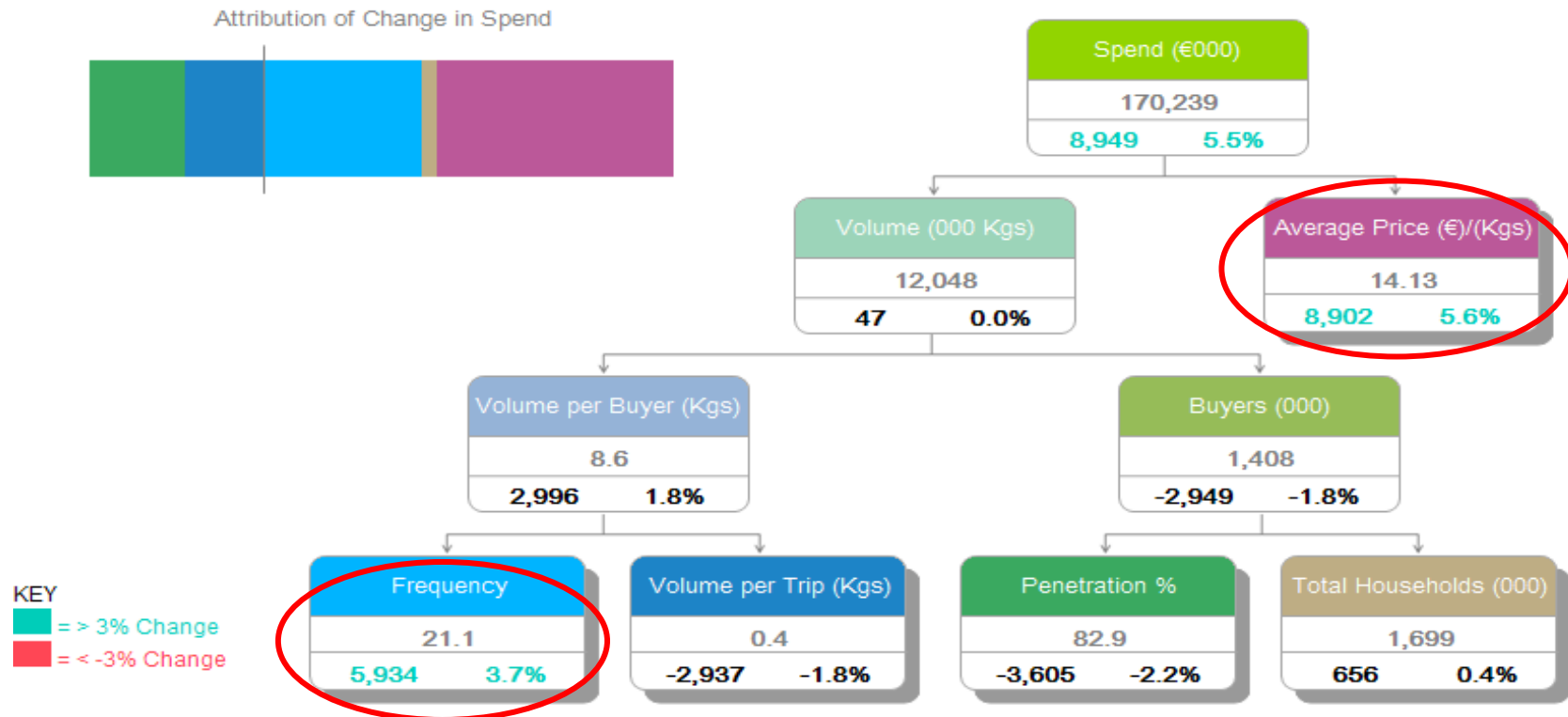


## Fresh Fish Drivers of Growth

Fresh Fish's YoY growth comes about as shoppers buy into the category more often, at higher average prices.

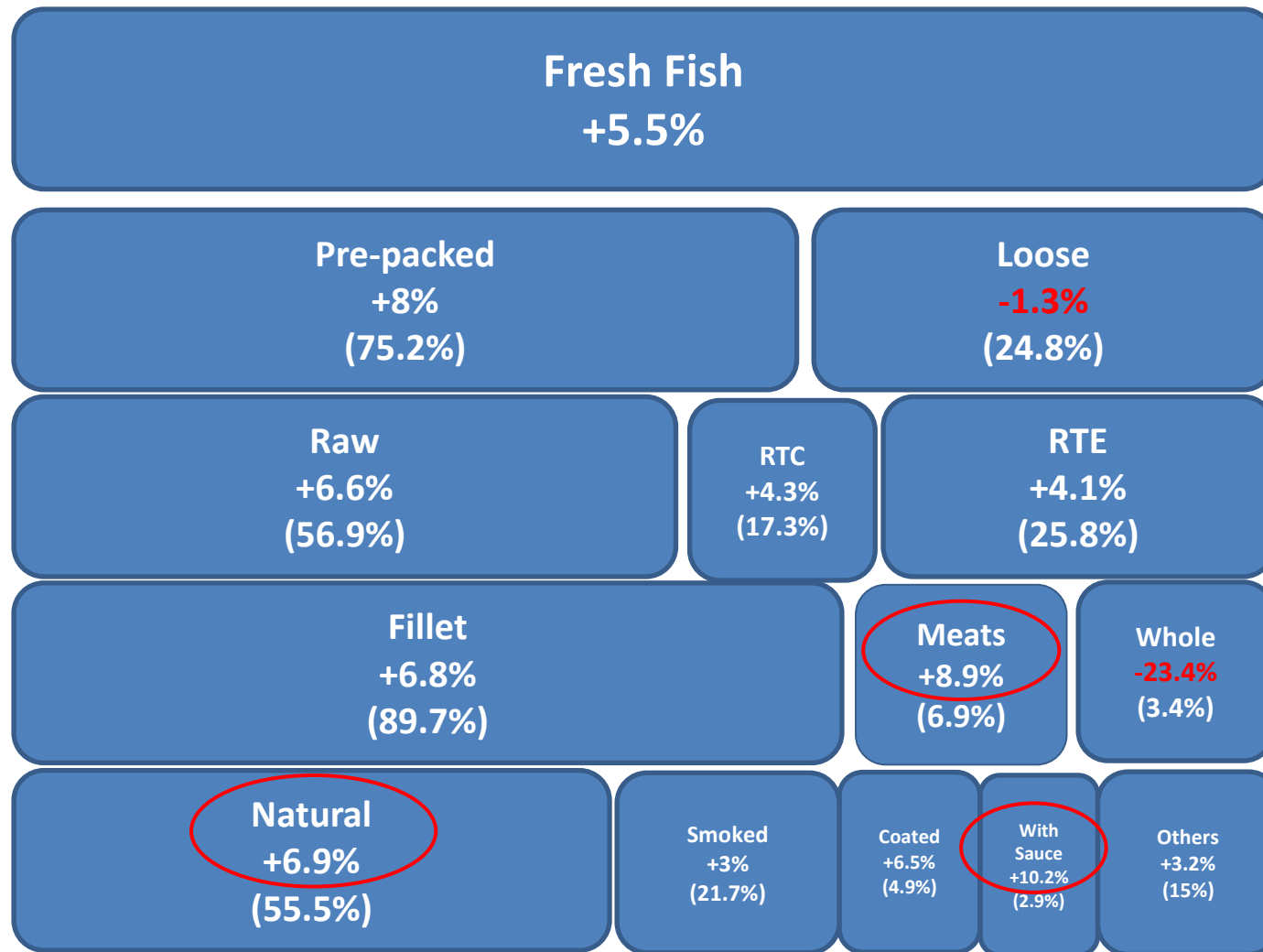
01-Jan-17 vs. Previous Year

Fresh | Total Outlets | Total Species | 52 w/e | Previous Year



Source: Kantar Worldpanel. Data to 1st  
January 2017

## Breaking Down the Fresh Fish Category's Growth



Source: Kantar Worldpanel. Data to 1st  
January 2017

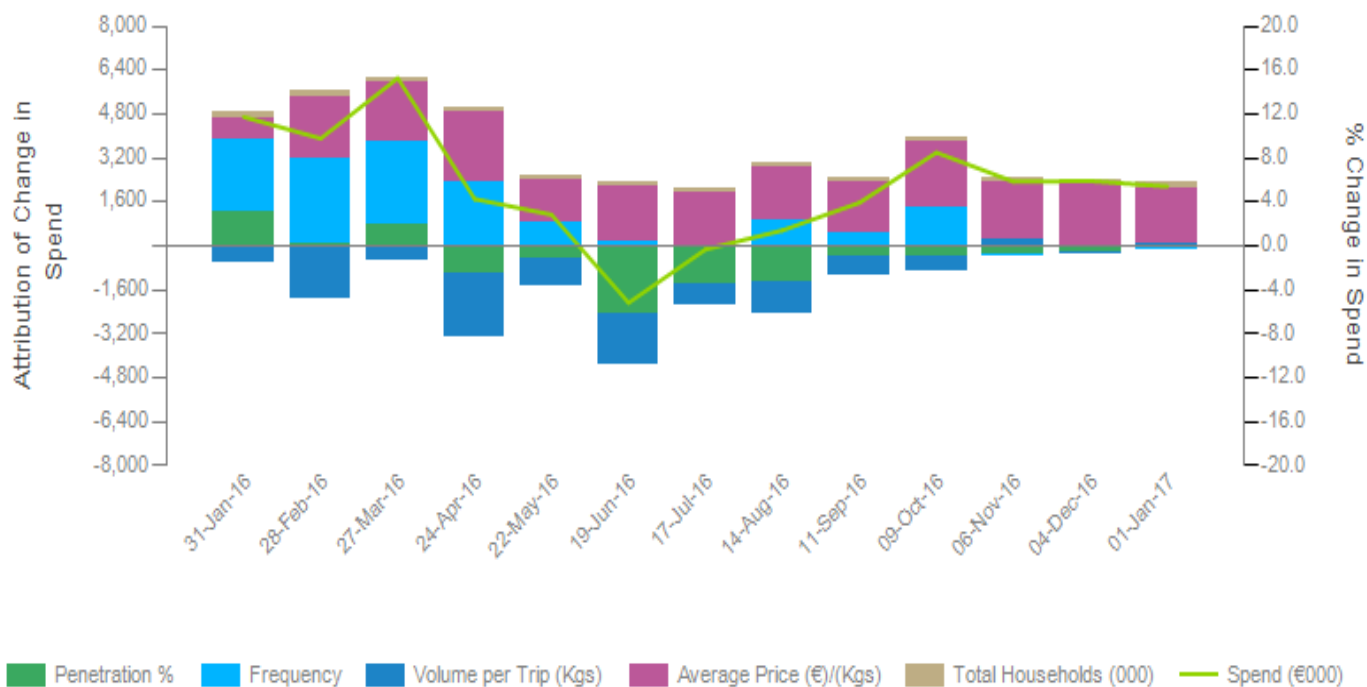


## Fresh Fish Drivers of Growth Trended

Growth in Fresh fish has increased in recent months after a steep decline in the summer. Growth has slowed down again in latest 12 weeks.

vs. Previous Year

Total Species | Total Outlets | Fresh | Total Market | 12 w/e | Previous Year



**68%** of €2.1m growth through Retired life stage

**DUNNES STORES** +€479k

**SuperValu** +€415k  
Real Food. Real People



+€270k

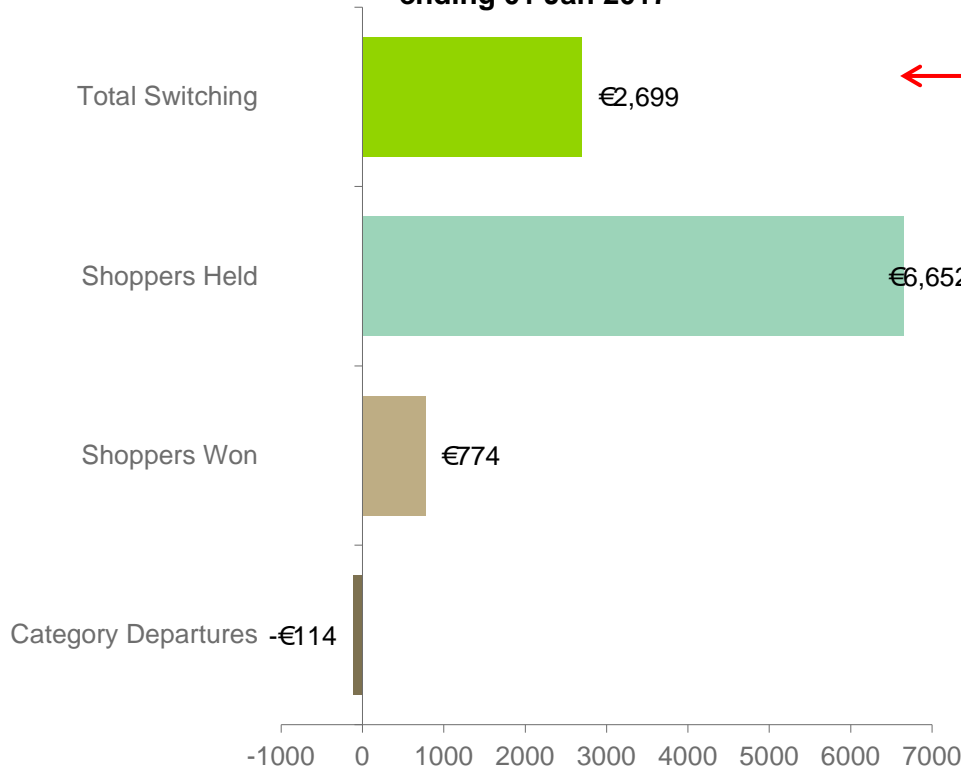
Source: Kantar Worldpanel. Data to 1st January 2017



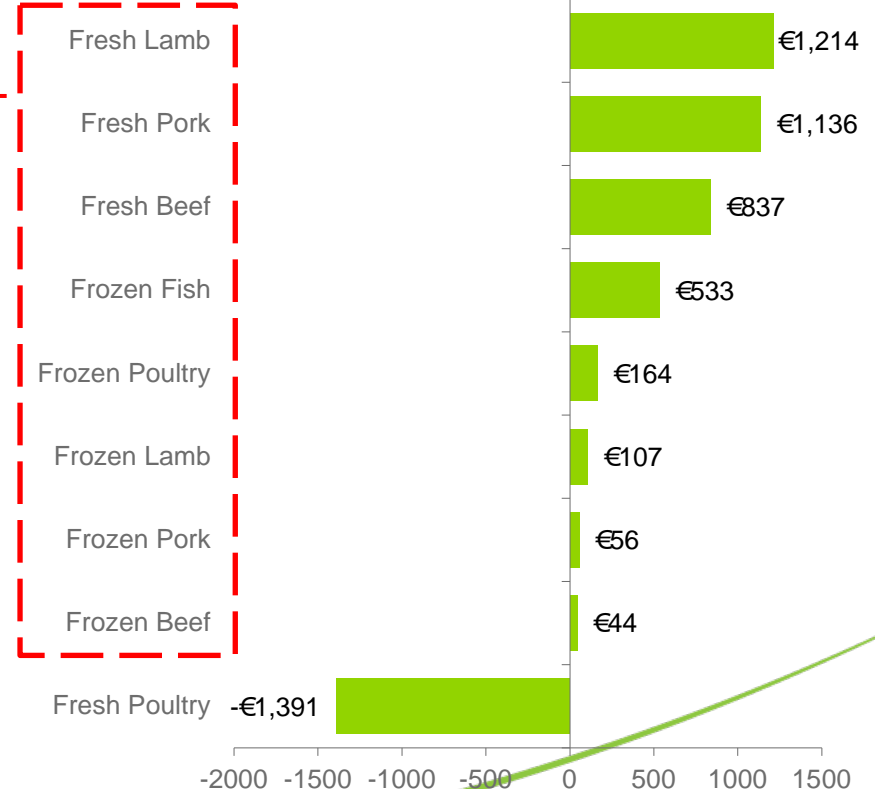
## Fresh Fish Switching

Fresh Fish has won switched spend from almost all other meat types.

Source of Fresh Fish Spend (£000s) Change - year ending 01 Jan 2017



Switching Spend (£000s) to Fresh Fish - year ending 01 Jan 2017

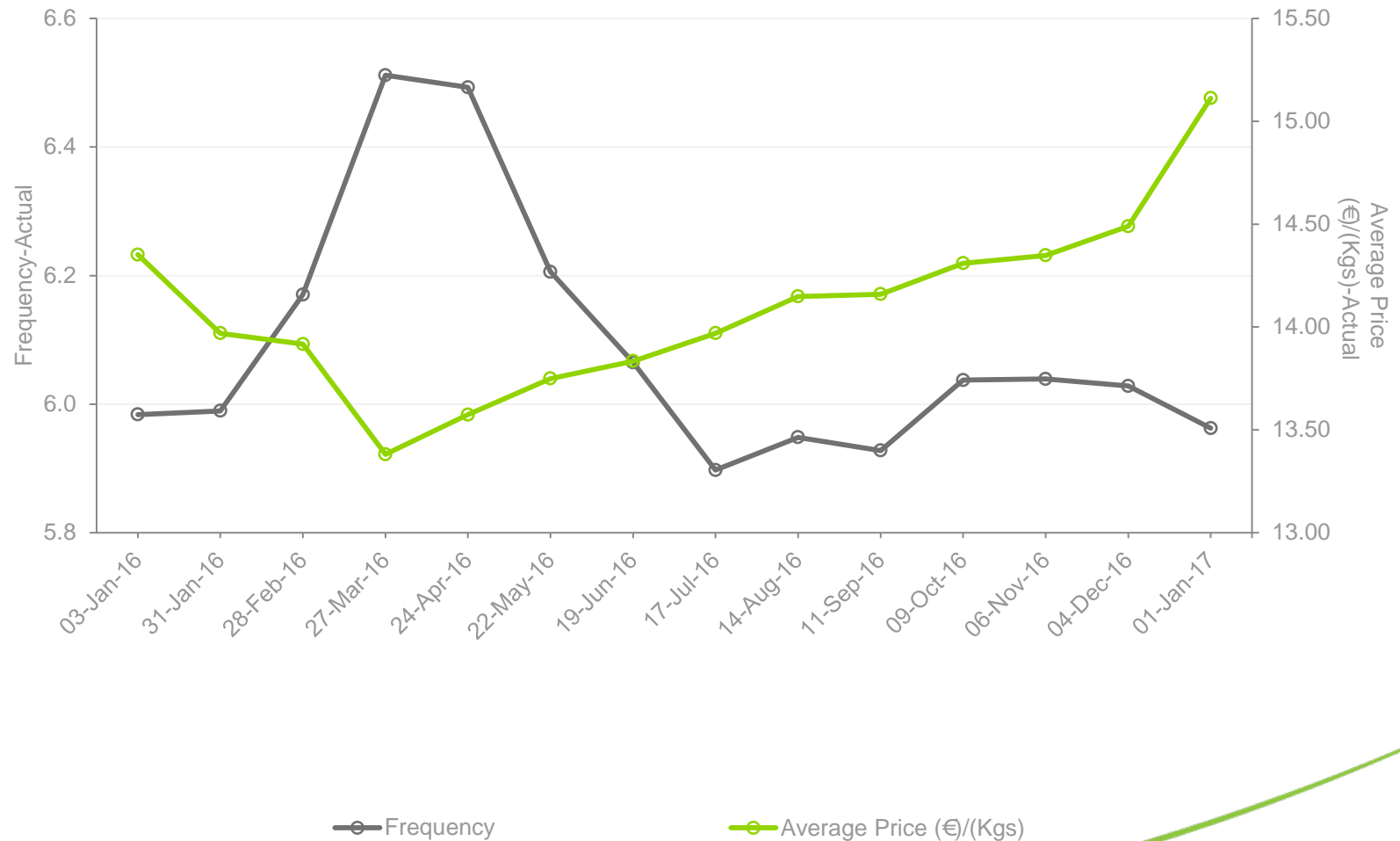


Source: Kantar Worldpanel. Data to 1st January 2017



# How do Higher prices affect Fresh Fish shopper frequency?

Actual | Total Species | Total Outlets | Fresh | Total Market | 12 w/e



Source: Kantar Worldpanel. Data to 1st January 2017

What Fresh Fish species are purchased most frequently?

Salmon – 13.3 times



Prawns – 5.5 times

Cod – 5.4 times

Hake – 4.3 times

Mackerel – 4.2 times

Coley – 4.1 times

Trout – 4 times

Whiting – 4 times

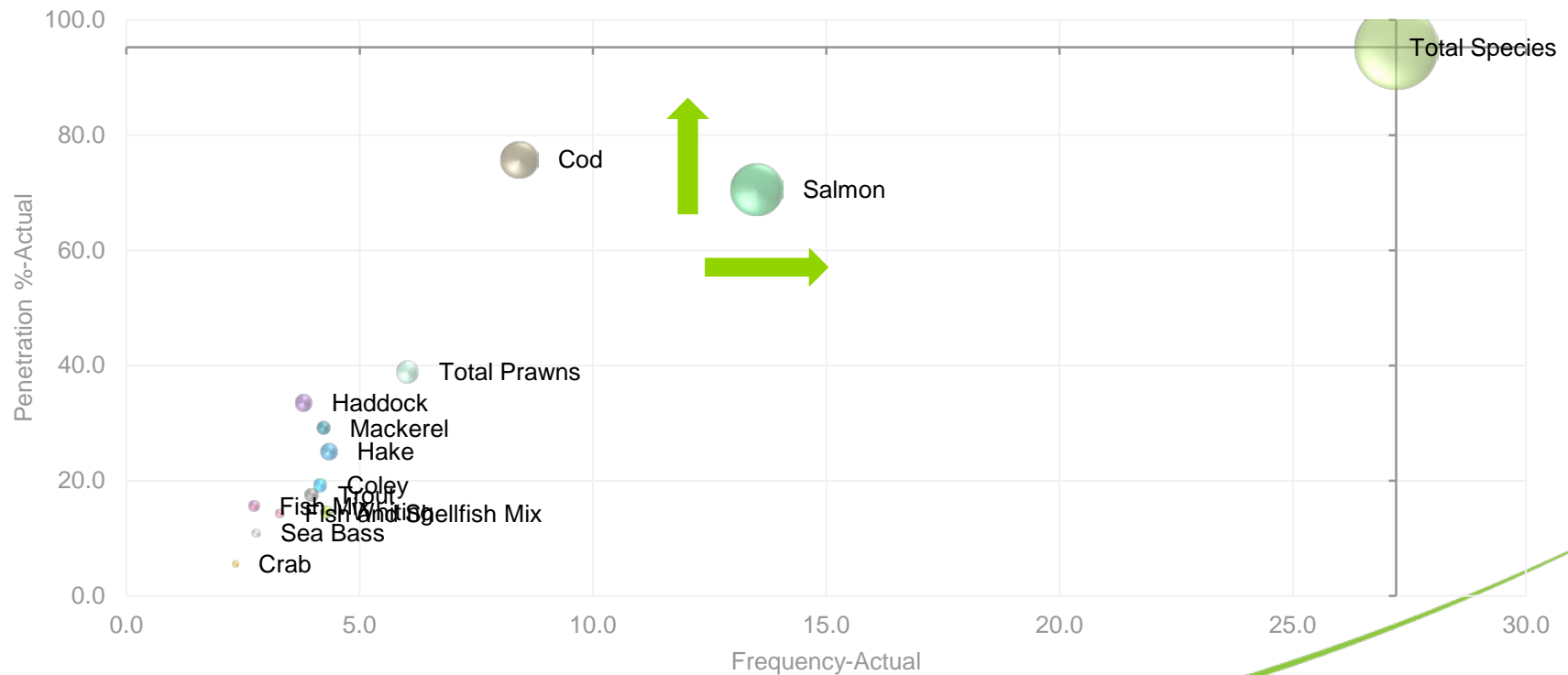


Source: Kantar Worldpanel. Data to 1st  
January 2017

## Fresh Fish Species Mapped

High shopper numbers and shoppers buying often is what makes Salmon such a valuable fish type.

Actual | Total Outlets | Total Market | Total Market | 52 w/e | 01-Jan-17

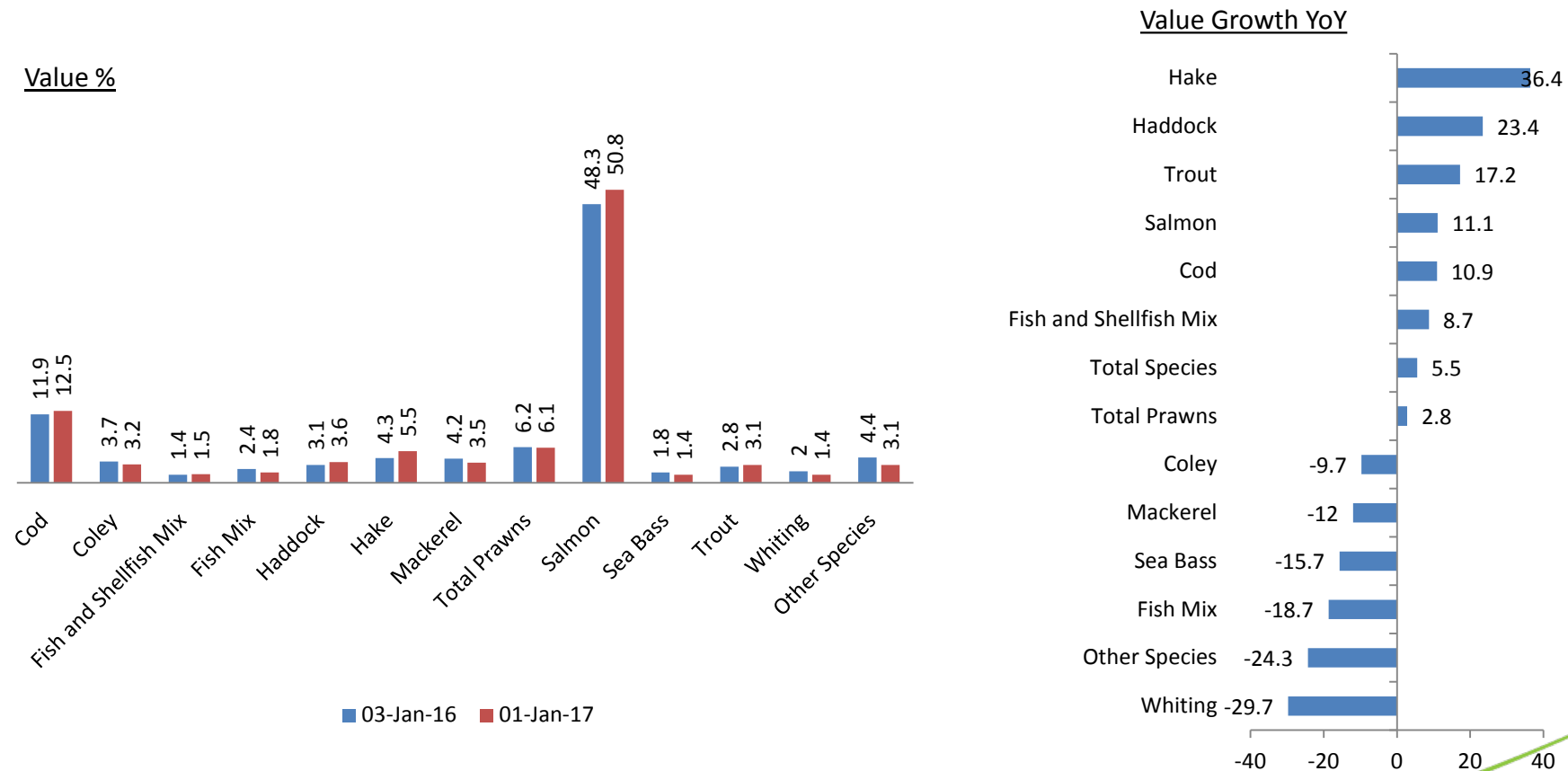


Bubble Size = Spend (€000) | Actual

Source: Kantar Worldpanel. Data to 1st January 2017

## Fresh Fish Species Value Share and Change

Hake, Haddock and Trout showed the top 3 growth rates, increasing their value share of the market.



Source: Kantar Worldpanel. Data to 1st January 2017

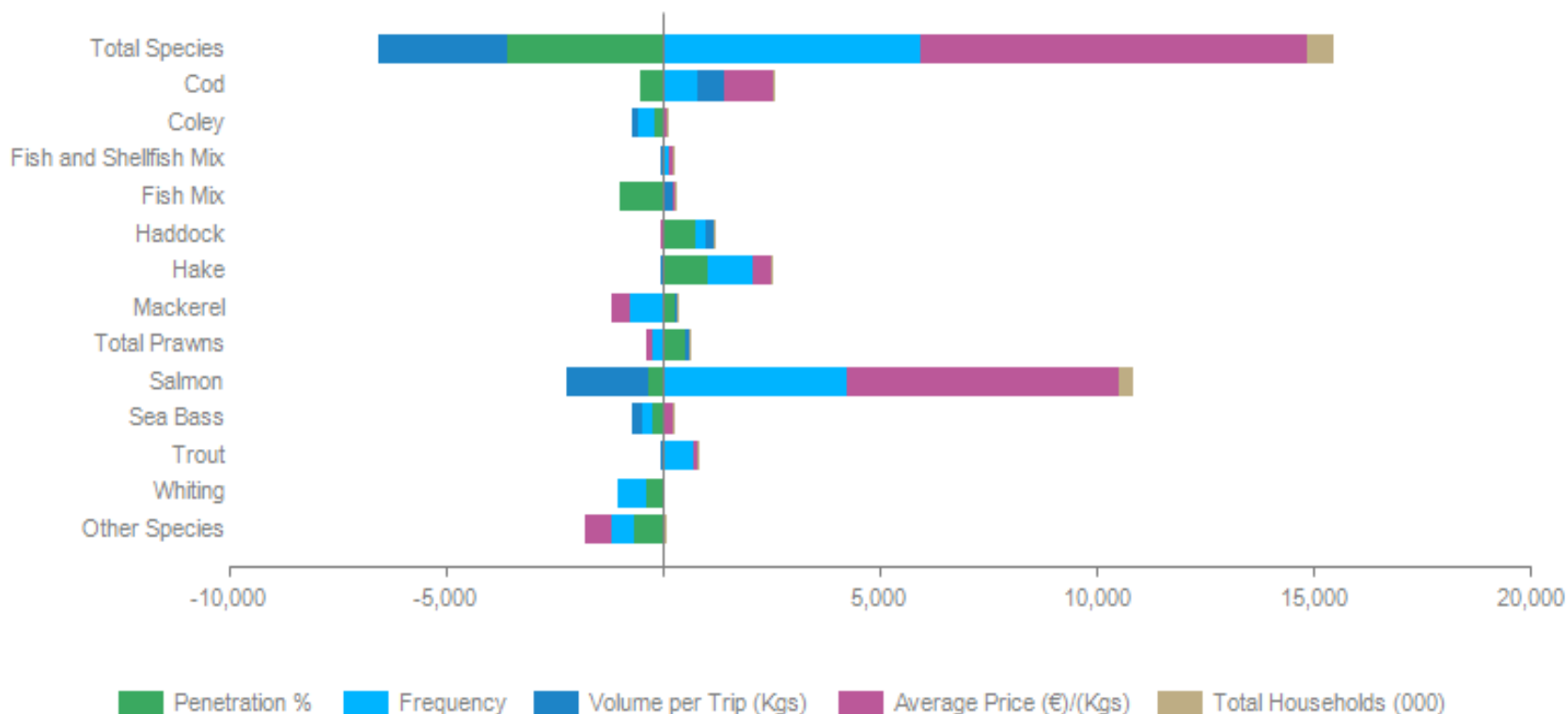


## Fresh Fish Species Drivers of Growth or Decline

Salmon's growth is being driven by higher average prices and consumers increasing their purchase frequency.

01-Jan-17 vs. Previous Year

Total Outlets | Fresh | Total Market | 52 w/e | Previous Year



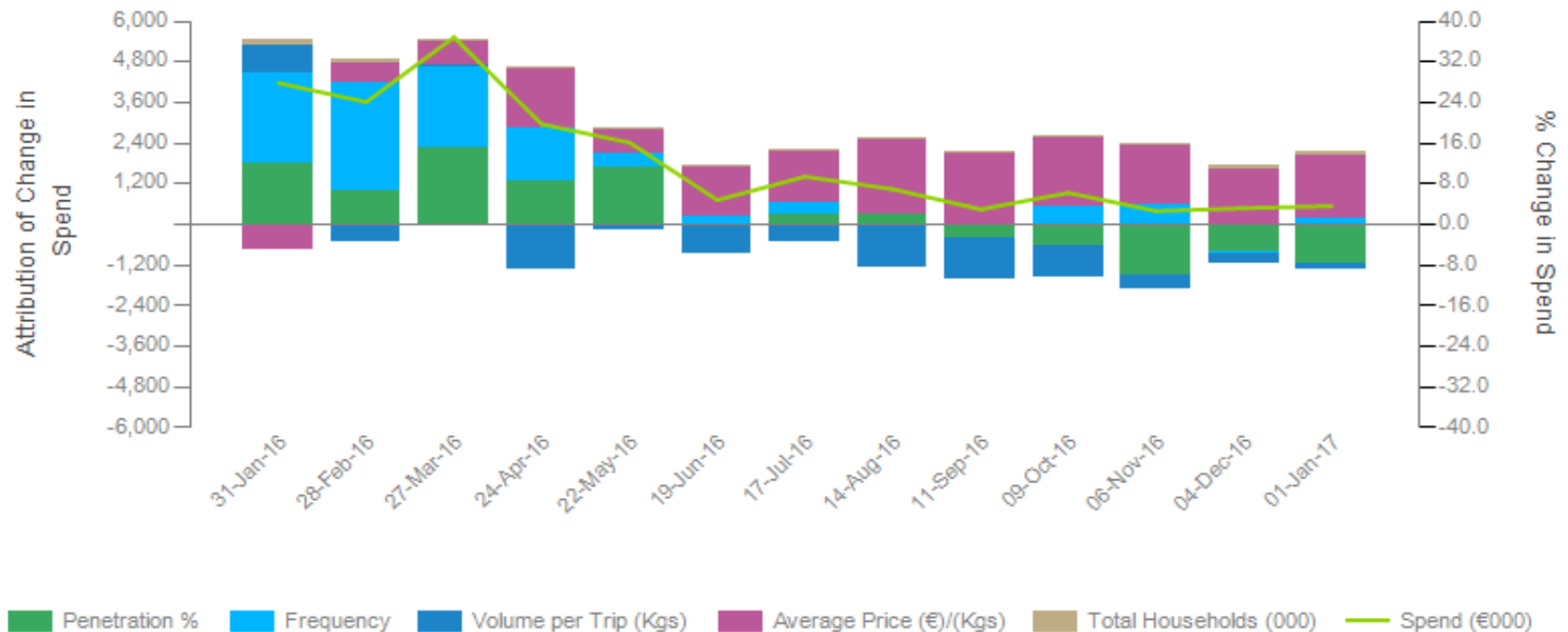
Source: Kantar Worldpanel. Data to 1st January 2017

## Salmon Trended Drivers of Growth

Following category trends, salmon growth has remained relatively flat in recent months, after a significant decline in the summer.

vs. Previous Year

Salmon | Total Outlets | Fresh | Total Market | 12 w/e | Previous Year



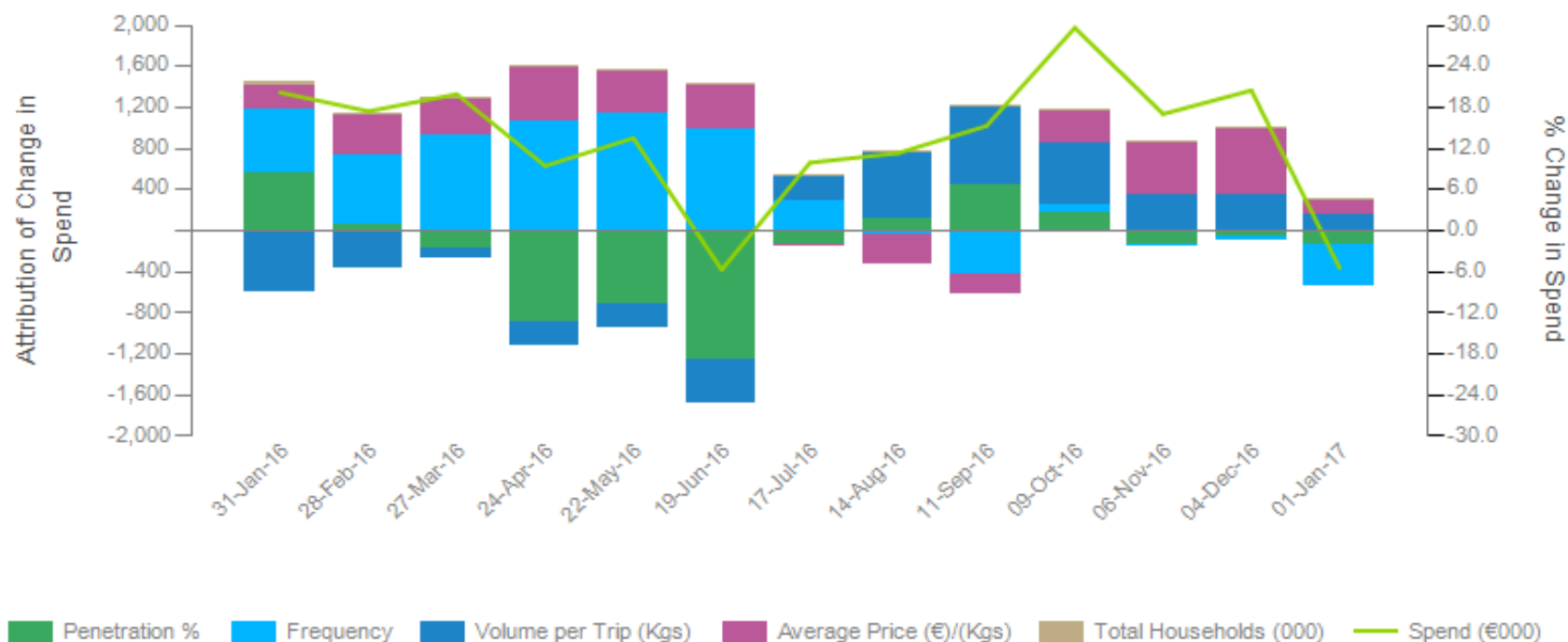
Source: Kantar Worldpanel. Data to 1st January 2017

## Cod Trended Drivers of Growth

Cod sales have dropped in the latest 12 weeks, due to a loss of shoppers and remaining shoppers purchasing less frequently.

vs. Previous Year

Cod | Total Outlets | Fresh | Total Market | 12 w/e | Previous Year



Source: Kantar Worldpanel. Data to 1st January 2017

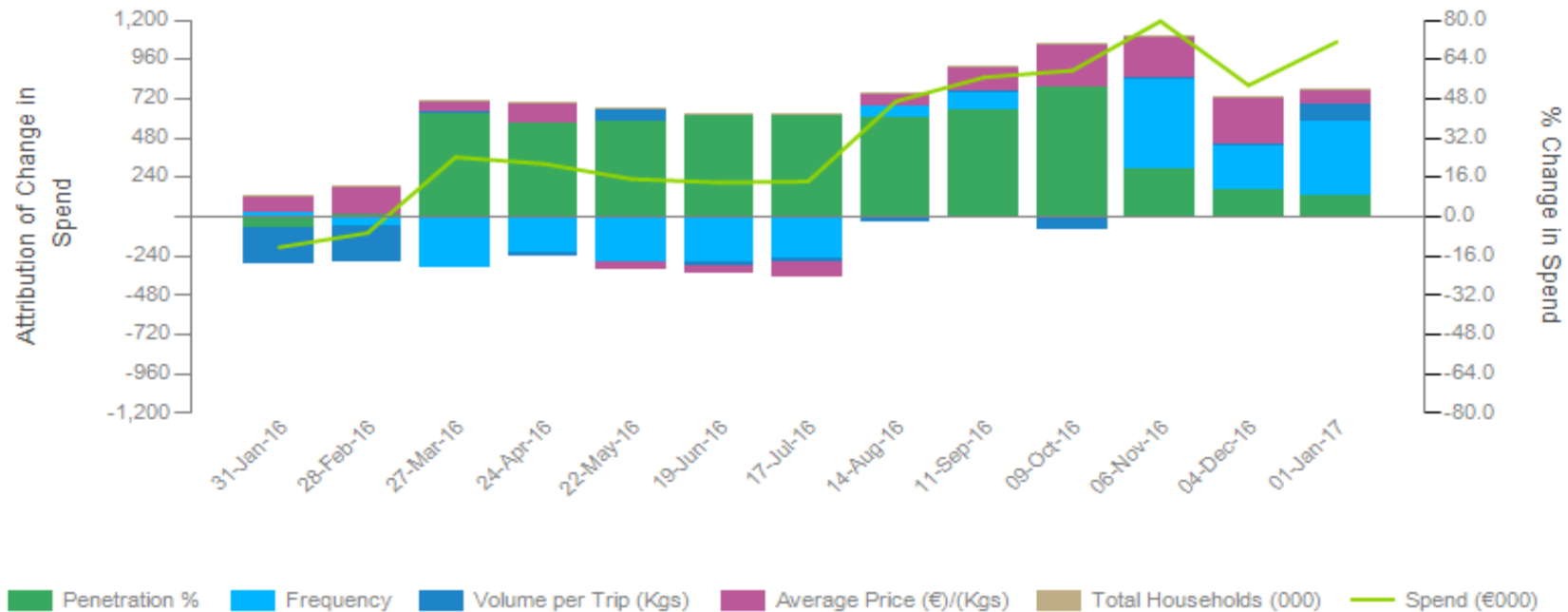


## Hake Trended Drivers of Growth

Apart from a decline in December, value sales of Hake have maintained a steady growth over recent months.

vs. Previous Year

Hake | Total Outlets | Fresh | Total Market | 12 w/e | Previous Year



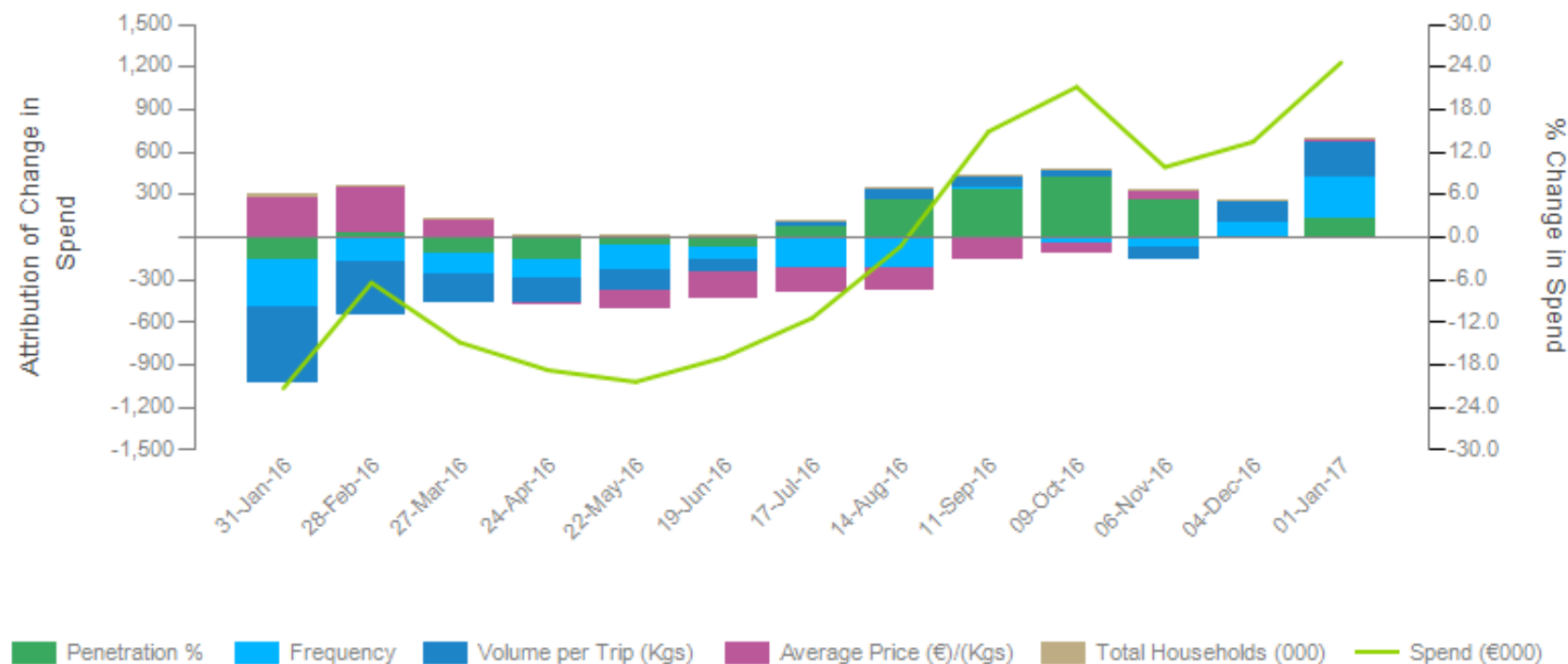
Source: Kantar Worldpanel. Data to 1st January 2017

## Fresh Prawn Trended Drivers of Growth

More shoppers buying into the segment, purchasing a higher volume and buying more frequently are all the factors driving the growth of Fresh Prawns.

vs. Previous Year

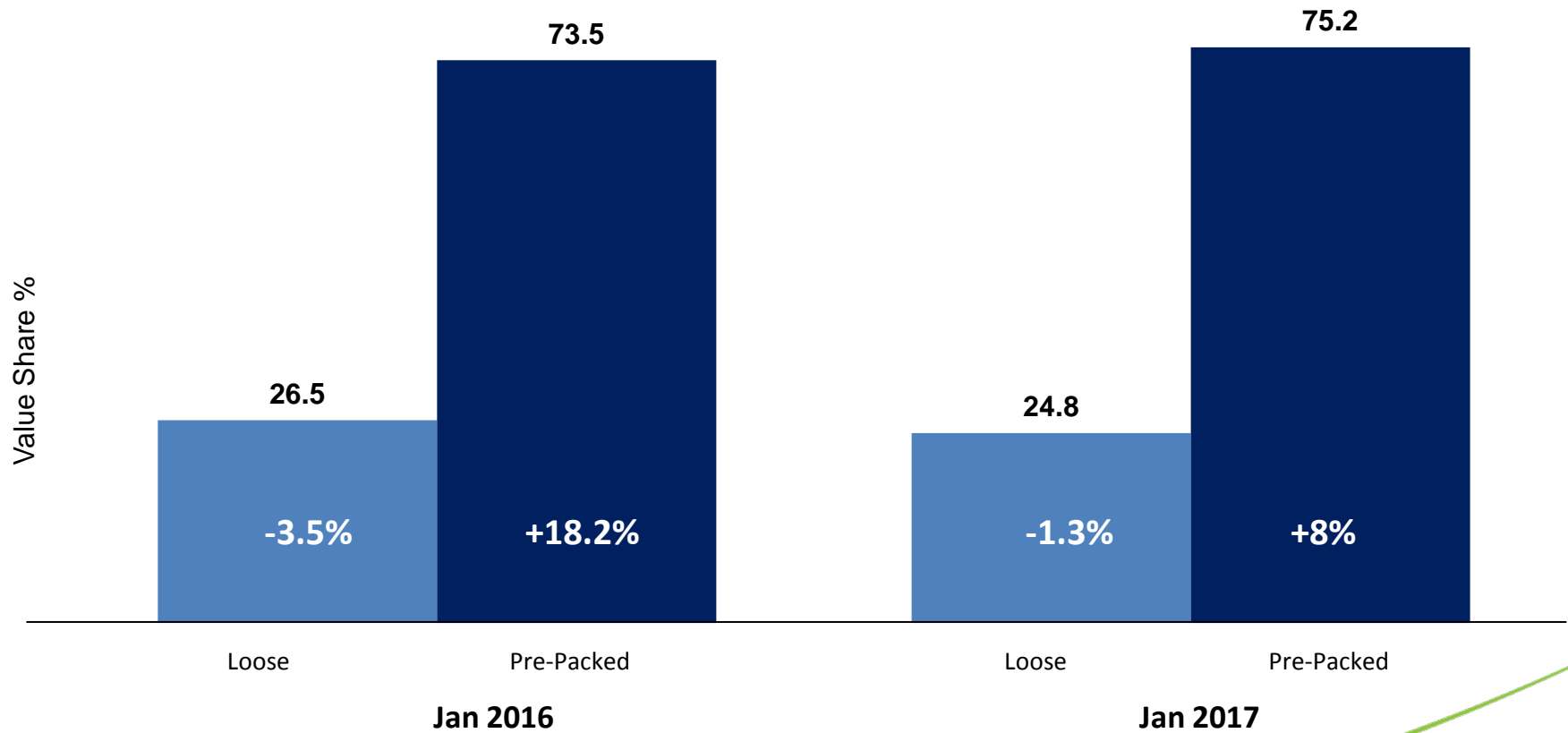
Total Prawns | Total Outlets | Fresh | Total Market | 12 w/e | Previous Year



Source: Kantar Worldpanel. Data to 1st January 2017

## Prepacked vs Loose Fresh Fish Value Share and Change

Prepacked Fresh Fish accounts for the majority of the category's value and has increased its share to over 75%



Source: Kantar Worldpanel. Data to 1st January 2017

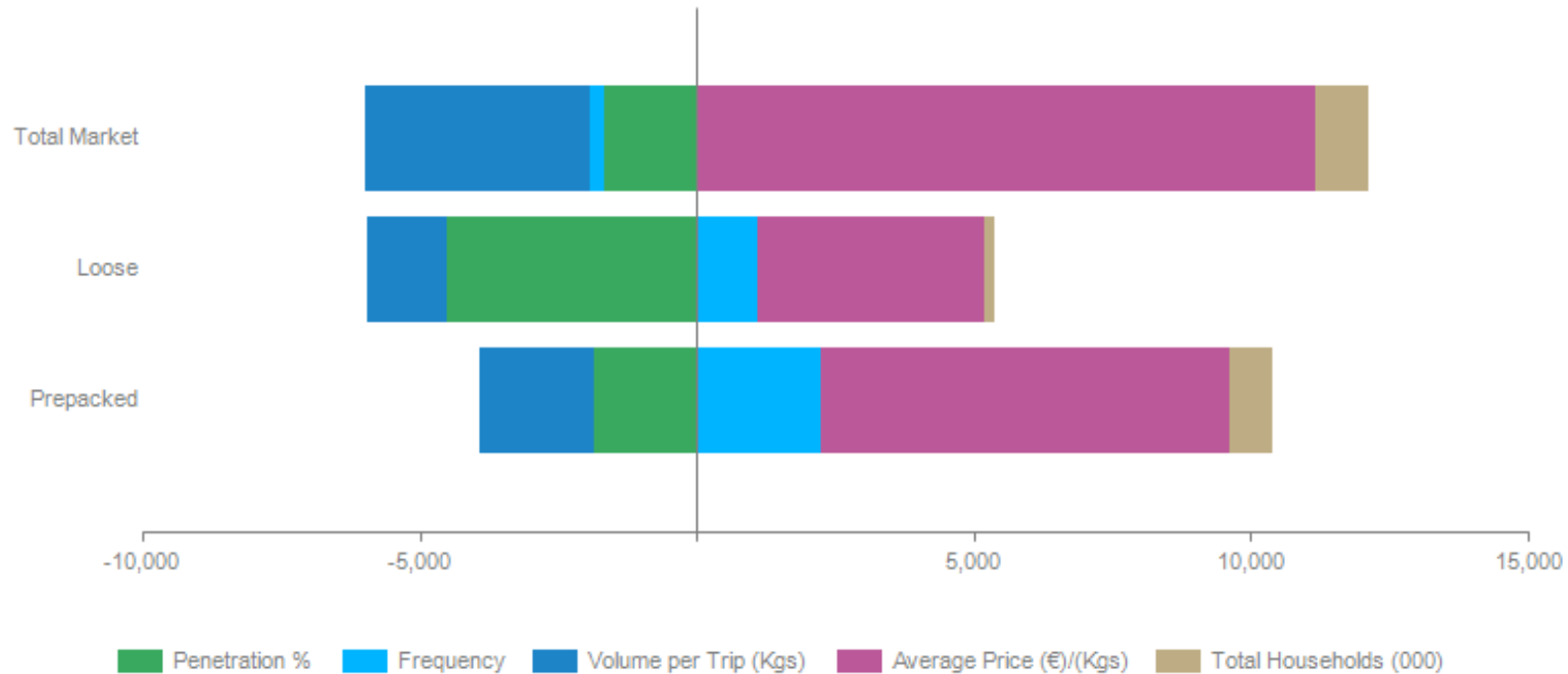


## Fresh Fish Drivers of Growth or Decline

Prepacked Fish's growth has been driven by increases in frequency and higher average prices.

01-Jan-17 vs. Previous Year

Total Outlets | Total Species | 52 w/e | Previous Year

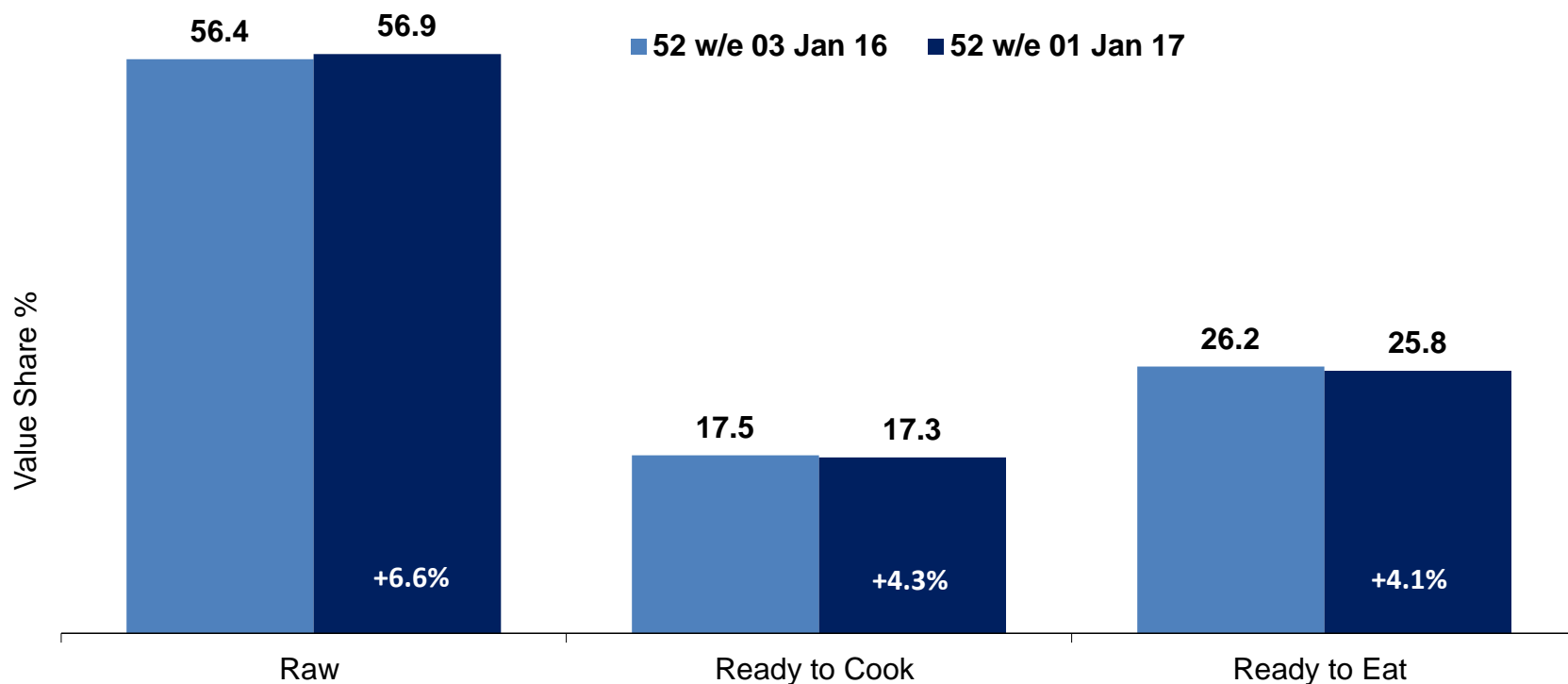


Source: Kantar Worldpanel. Data to 1st  
January 2017



## Raw/RTC/RTE Fresh Fish Value Share and Change

Raw fish remains most popular among shoppers. Although all segments are in growth, raw is the only one that has increased its market share.

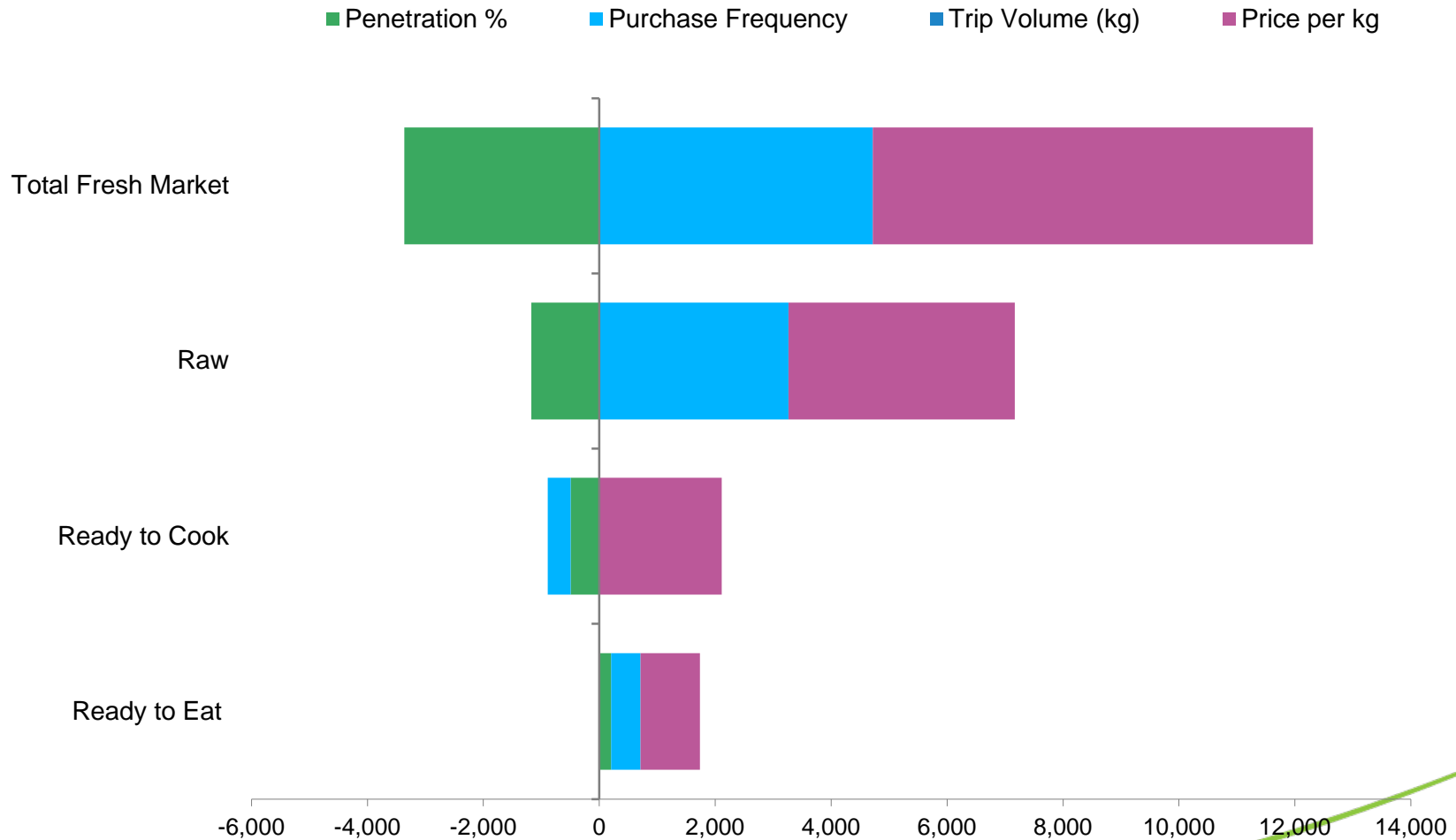


Source: Kantar Worldpanel. Data to 1st January 2017



## Sector Drivers of Growth

Raw growth has been driven by shoppers purchasing more often, at a higher price.

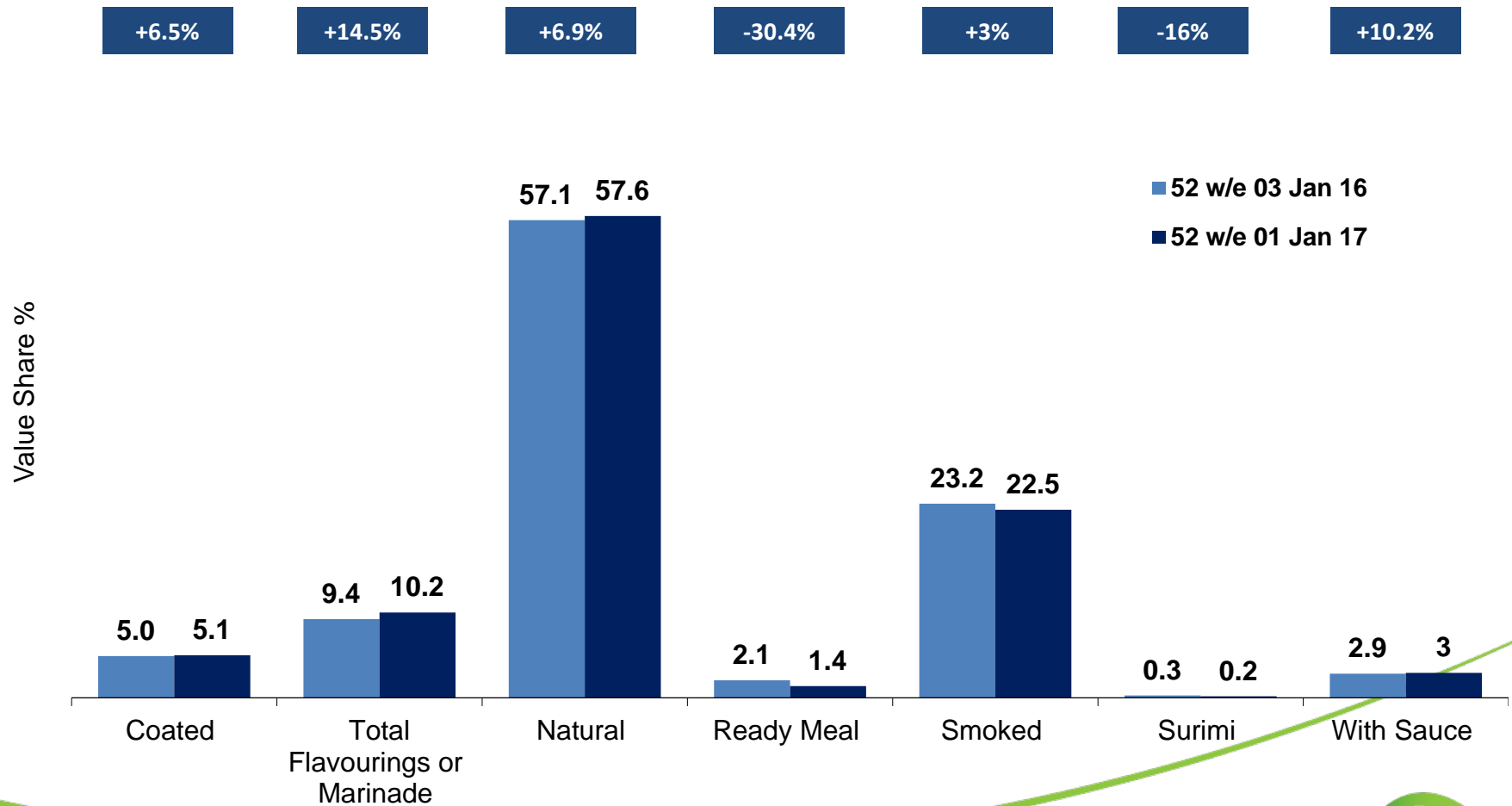


Source: Kantar Worldpanel. Data to 1st January 2017



## Sector Fresh Fish Value Share and Growth

Fish with Flavourings or Marinade has seen the strongest growth on LY, while Ready Meals continue to decline dramatically in popularity.

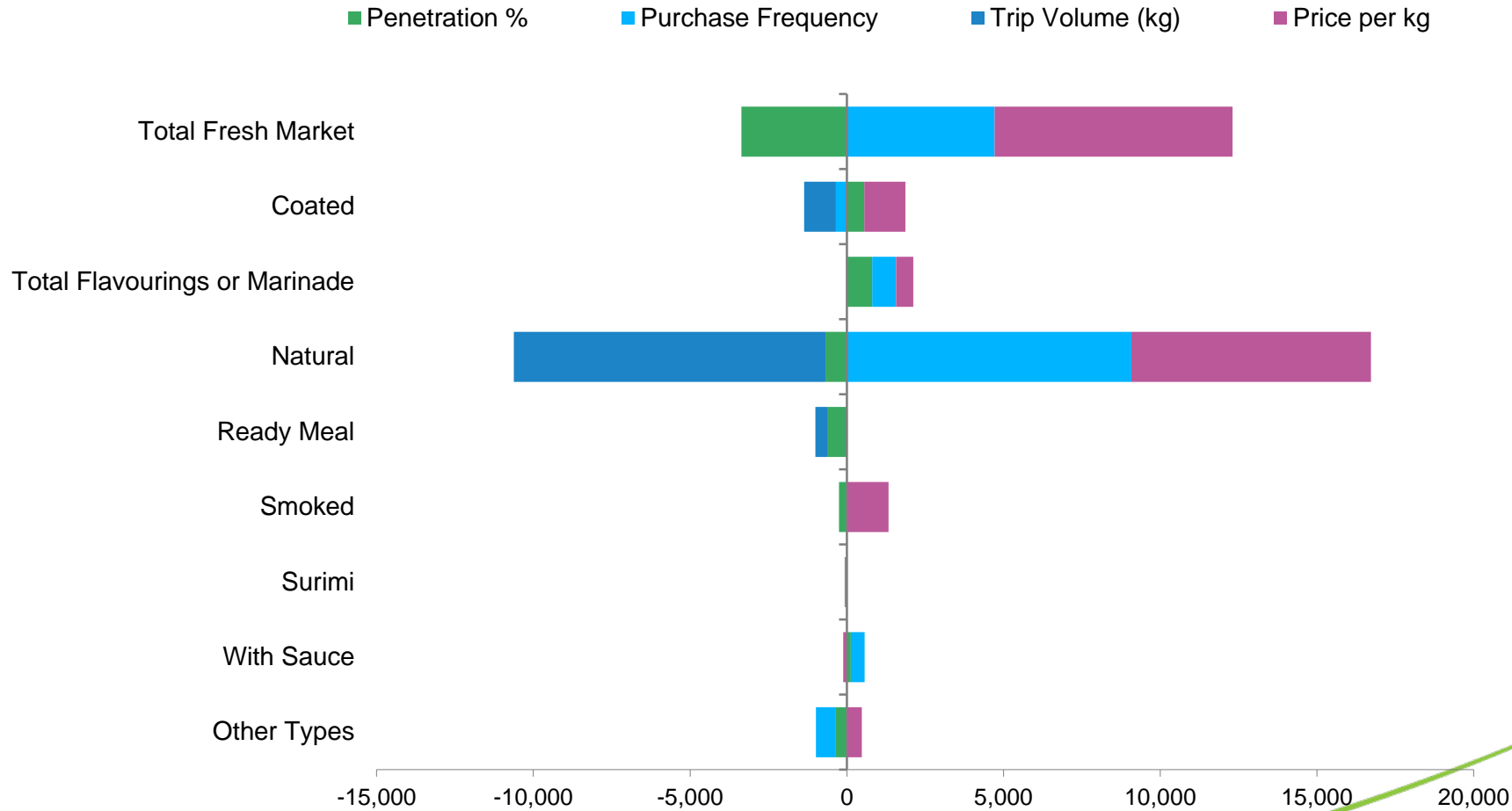


Source: Kantar Worldpanel. Data to 1st January 2017



## Sector Drivers of Growth

Very strong performance from Natural, driving the frequency gains within the category.



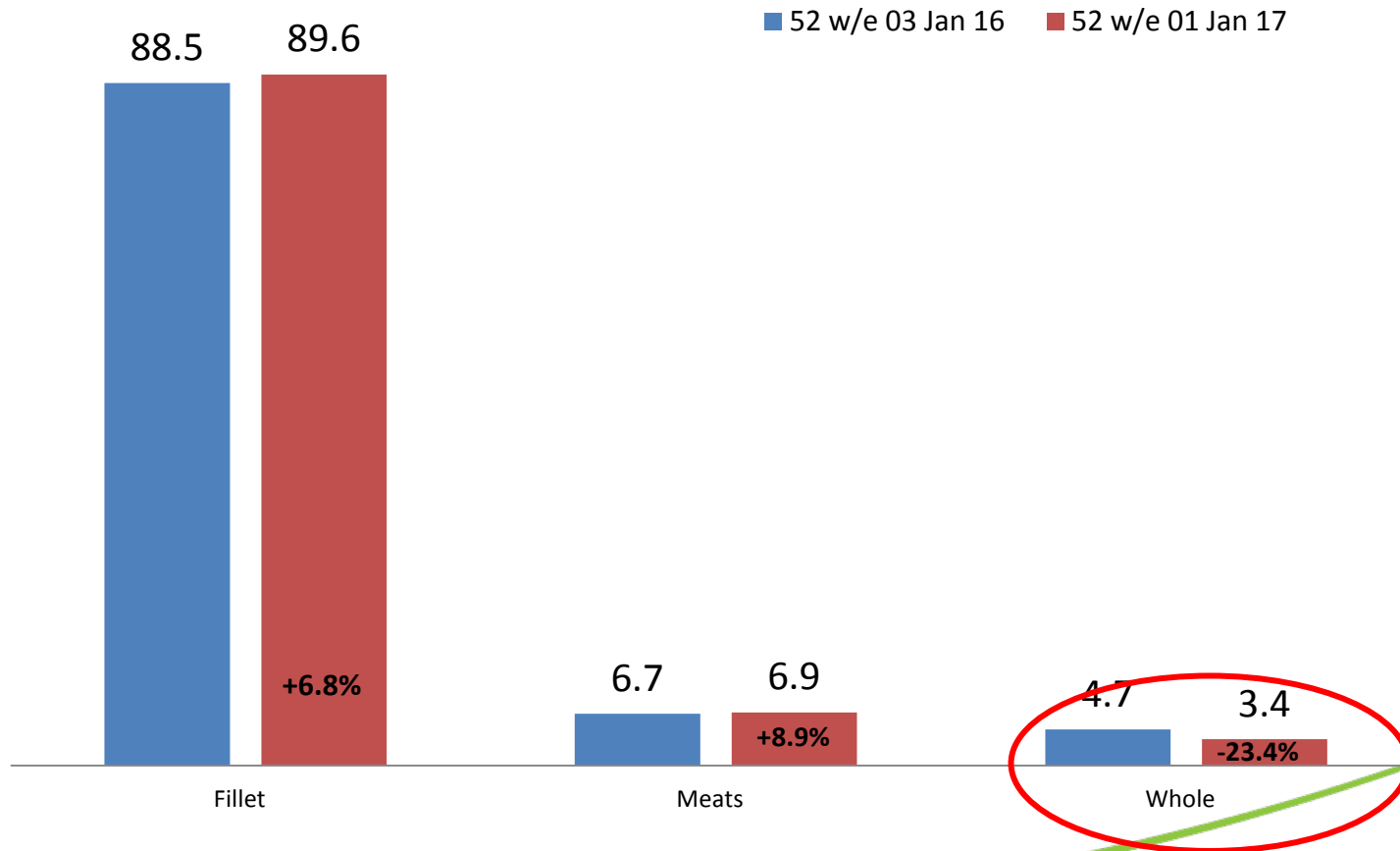
Source: Kantar Worldpanel. Data to 1st January 2017





## Type of Cut Fresh Fish Value Share and Change

Meats and Fillets are outperforming the market and capturing share. Whole is in notable decline since LY.

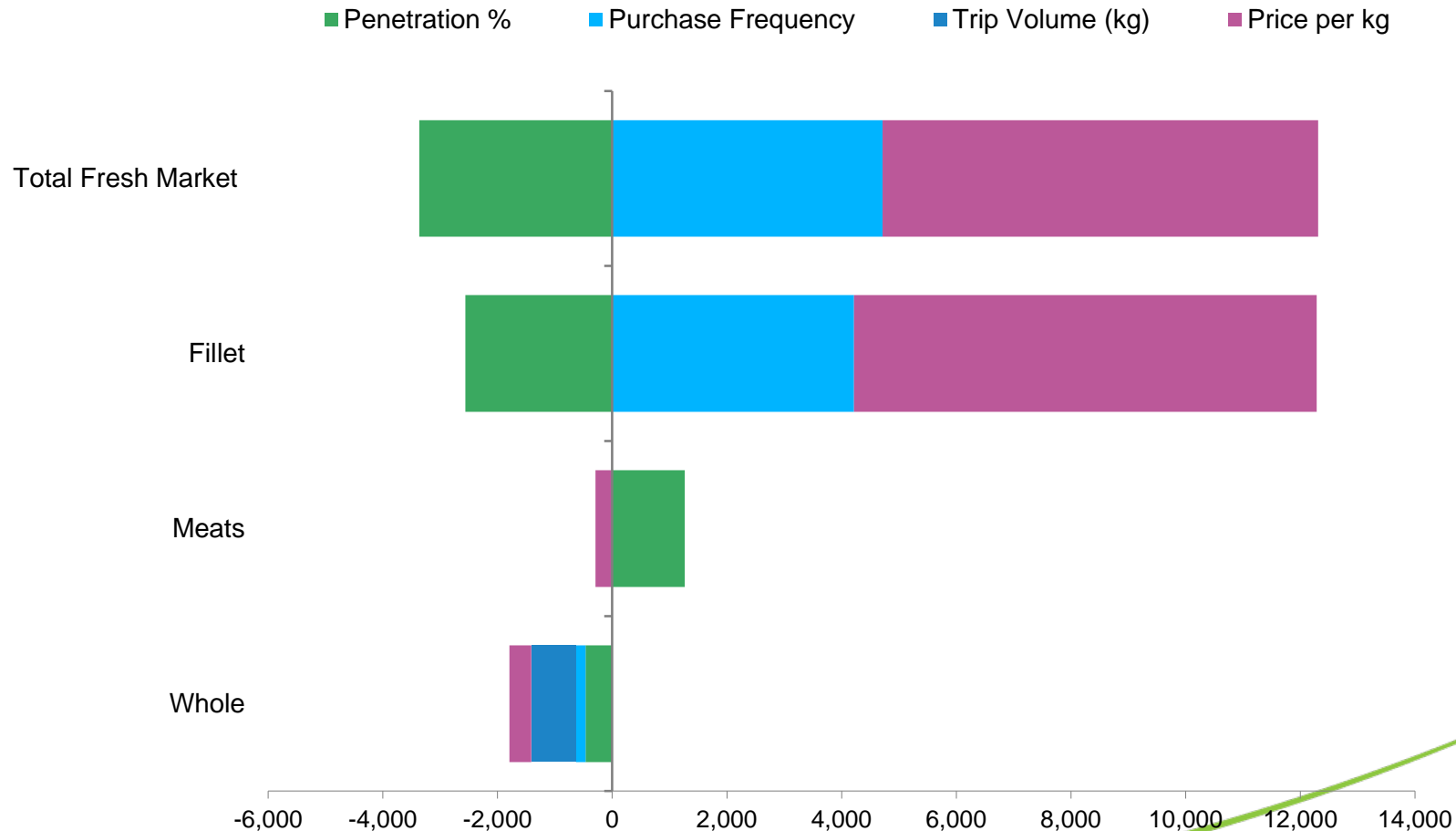


Source: Kantar Worldpanel. Data to 1st January 2017



## Type of Cut Drivers of Growth

Growth of Fillets is driven by shoppers buying more frequently, at a higher price. Meats are also in growth, having successfully recruited new shoppers.

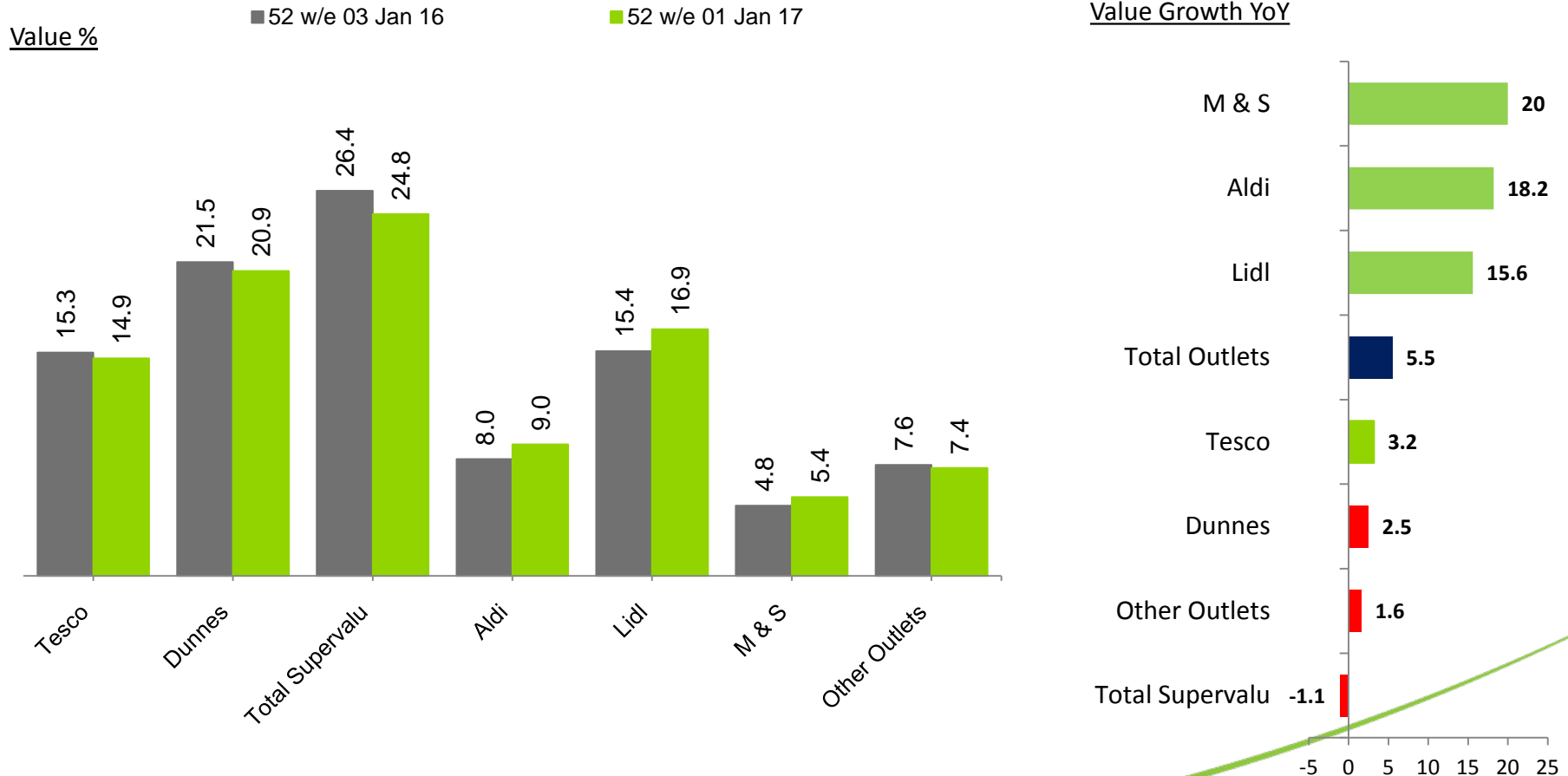


Source: Kantar Worldpanel. Data to 1st January 2017



## Fresh Fish Retailers Value Share and Change (52 w/e)

M&S and Discounters have had strong growth on LY. Supervalu is the only retailer to have declined over this period.

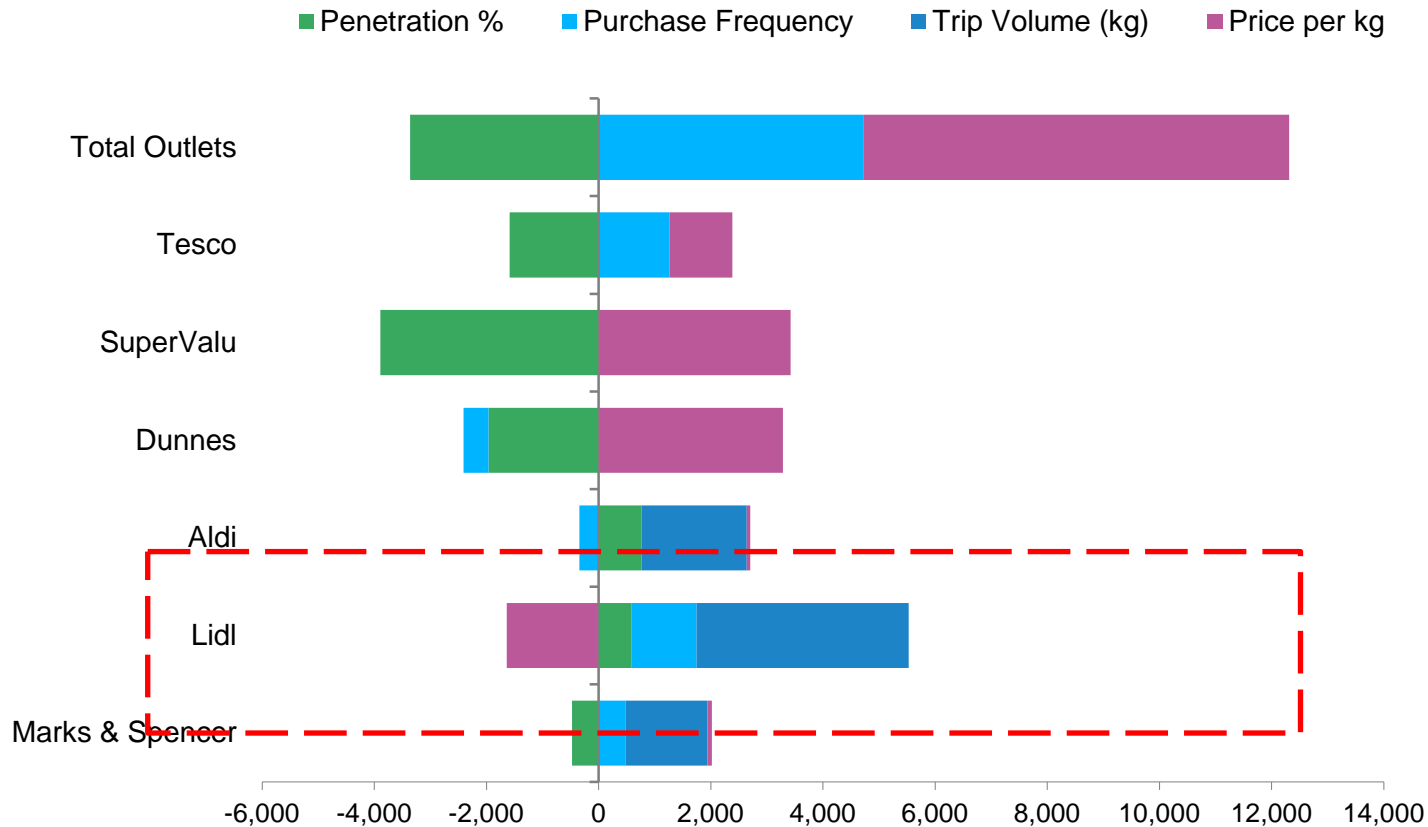


Source: Kantar Worldpanel. Data to 1st January 2017



## Fresh Fish Retailers Drivers of Growth or Decline

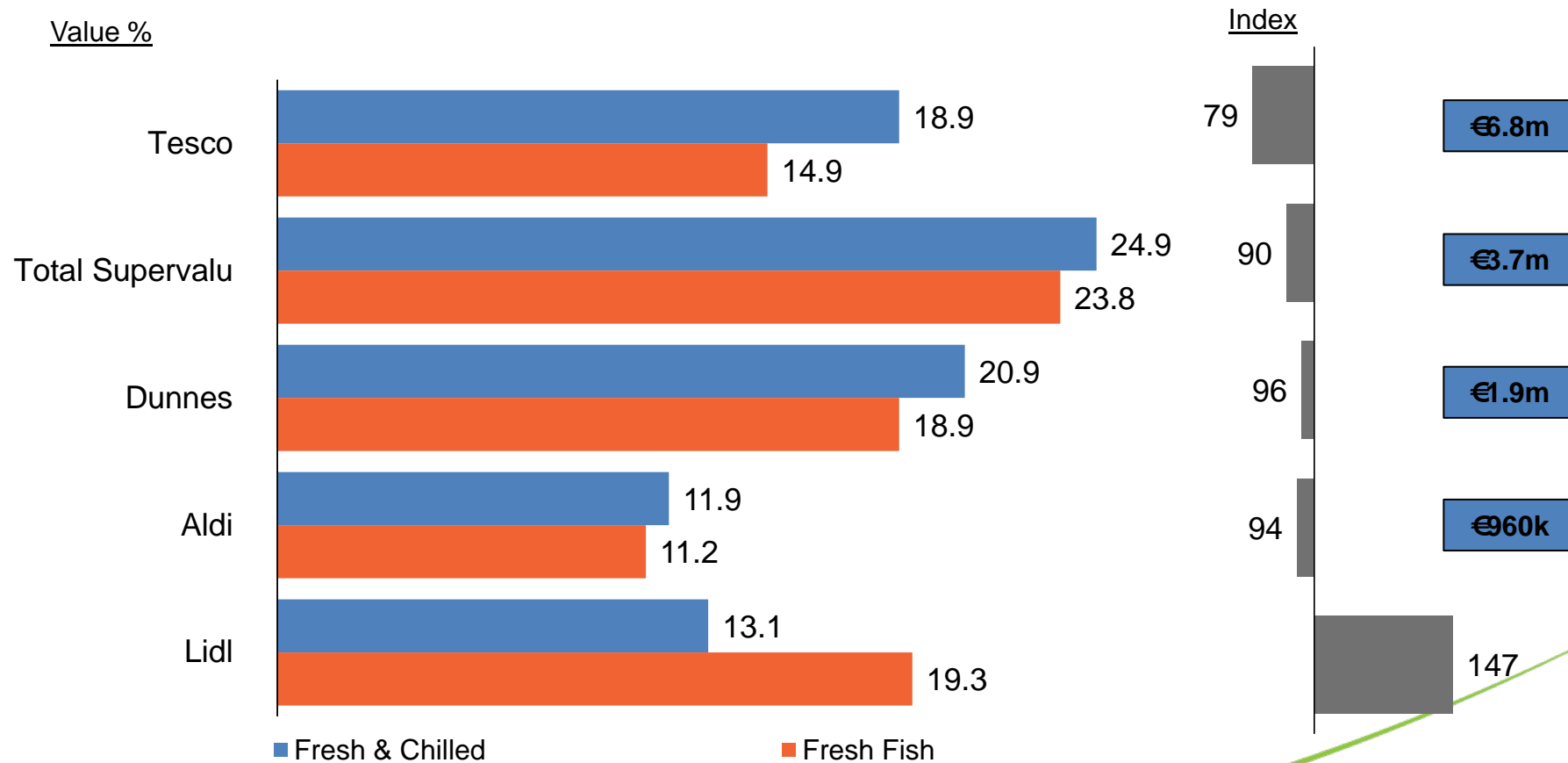
Both discounters have grown through recruiting new shoppers and getting shoppers to buy more volume.



Source: Kantar Worldpanel. Data to 1st January 2017

## In Which Retailers is there Opportunity to Grow?

All retailers except Lidl present an opportunity to grow. If Tesco were to achieve fair share, there would be an opportunity of €6.8m.



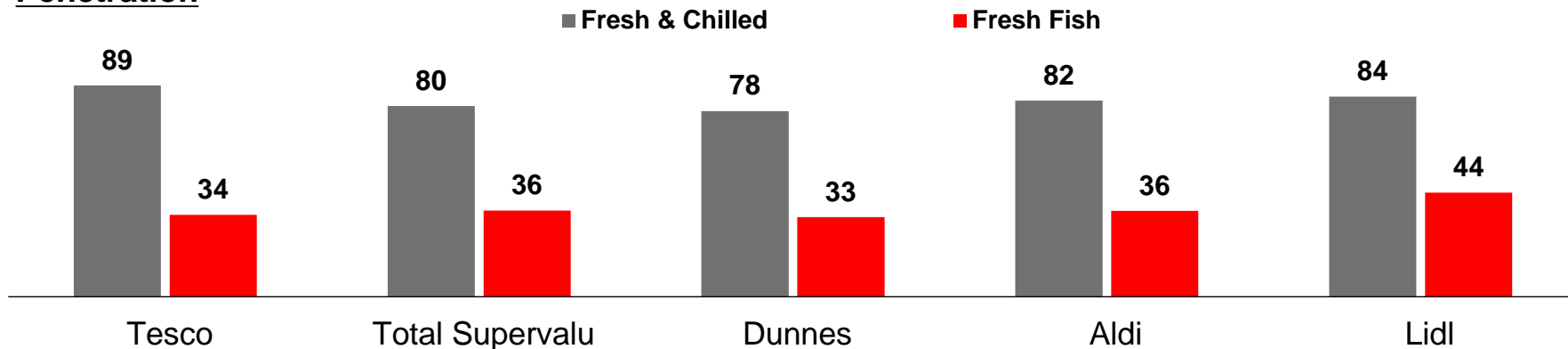
Source: Kantar Worldpanel. Data to 1st January 2017



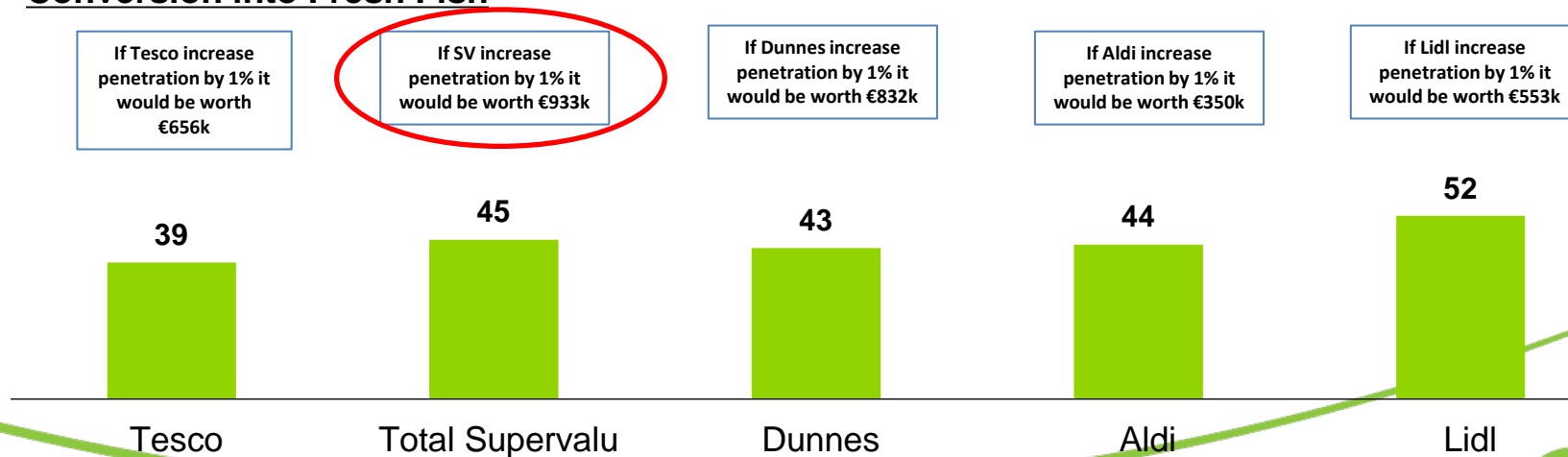
## Retailer Conversion

There is opportunity for all of the retailers to convert more of their shoppers to purchase Fresh Fish in store.

### Penetration



### Conversion into Fresh Fish



Source: Kantar Worldpanel. Data to 1st January 2017



# Insight

- Strong growth in Fresh Fish has continued over the latest 52 weeks. Current health trends and rising consumer sentiment have encouraged shoppers to switch spend away from other proteins into the segment.
- In the shorter term, growth has continued after a decline during the summer months, but has begun to level off in the most recent months. The retired demographic is responsible for much of this growth, increasing spend mainly in Dunnes and SuperValu.
- Health trends are evident, as ready meals experience steep decline and natural fish remains market leader.
- Convenience is a major factor in consumer decision making, as fillets continue to grow and increase market share, while whole fish sales drastically decline.
- Growth is being driven from the aisles rather than the fish counter, as pre-packed continues to grow and gain market share ahead of loose.

# Focus on Coated Fish



Source: Kantar Worldpanel. Data to 1st  
January 2017



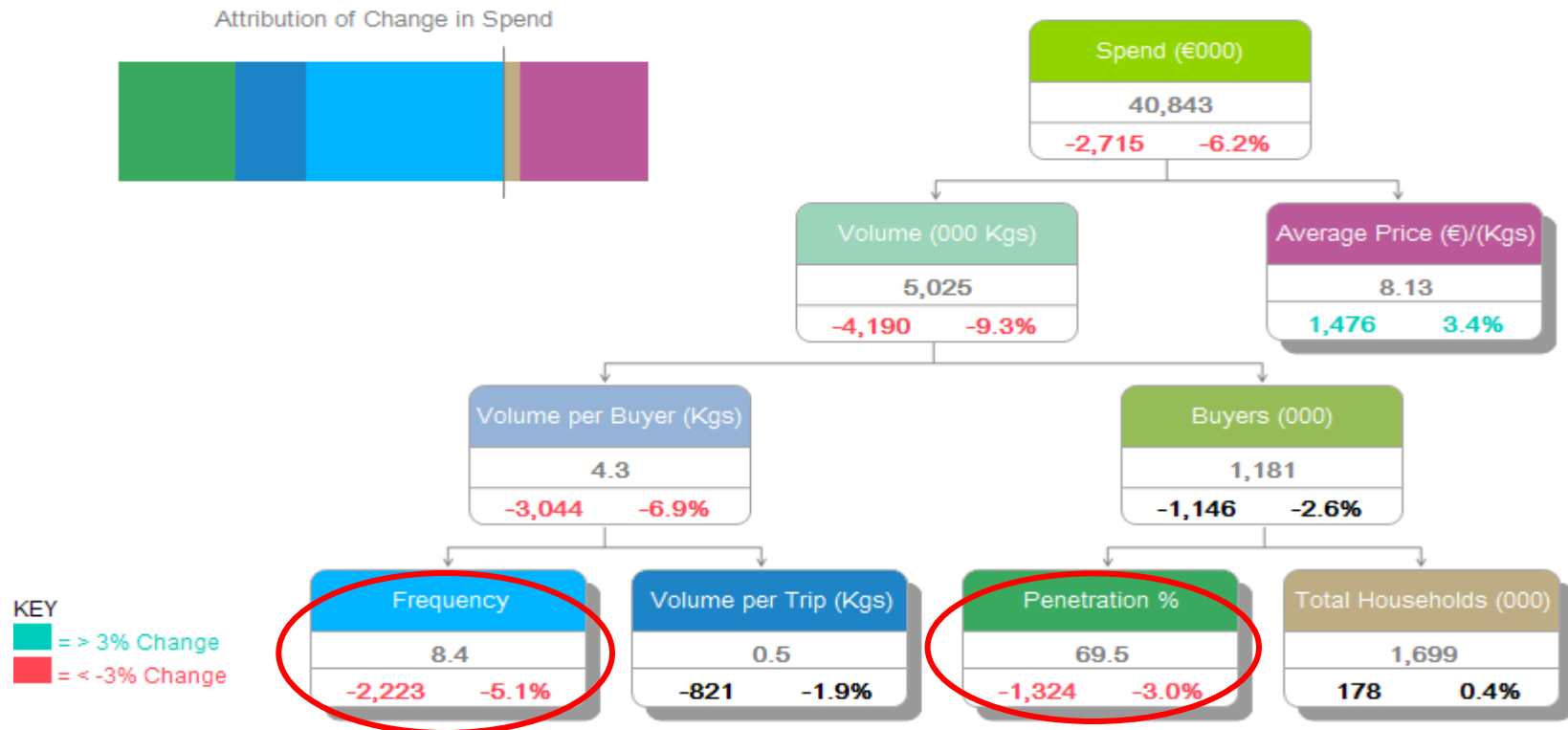


## Coated Fish Drivers of Growth

Total Coated Fish is down YoY as less shoppers buy into the segment and buy less frequently over the year.

01-Jan-17 vs. Previous Year

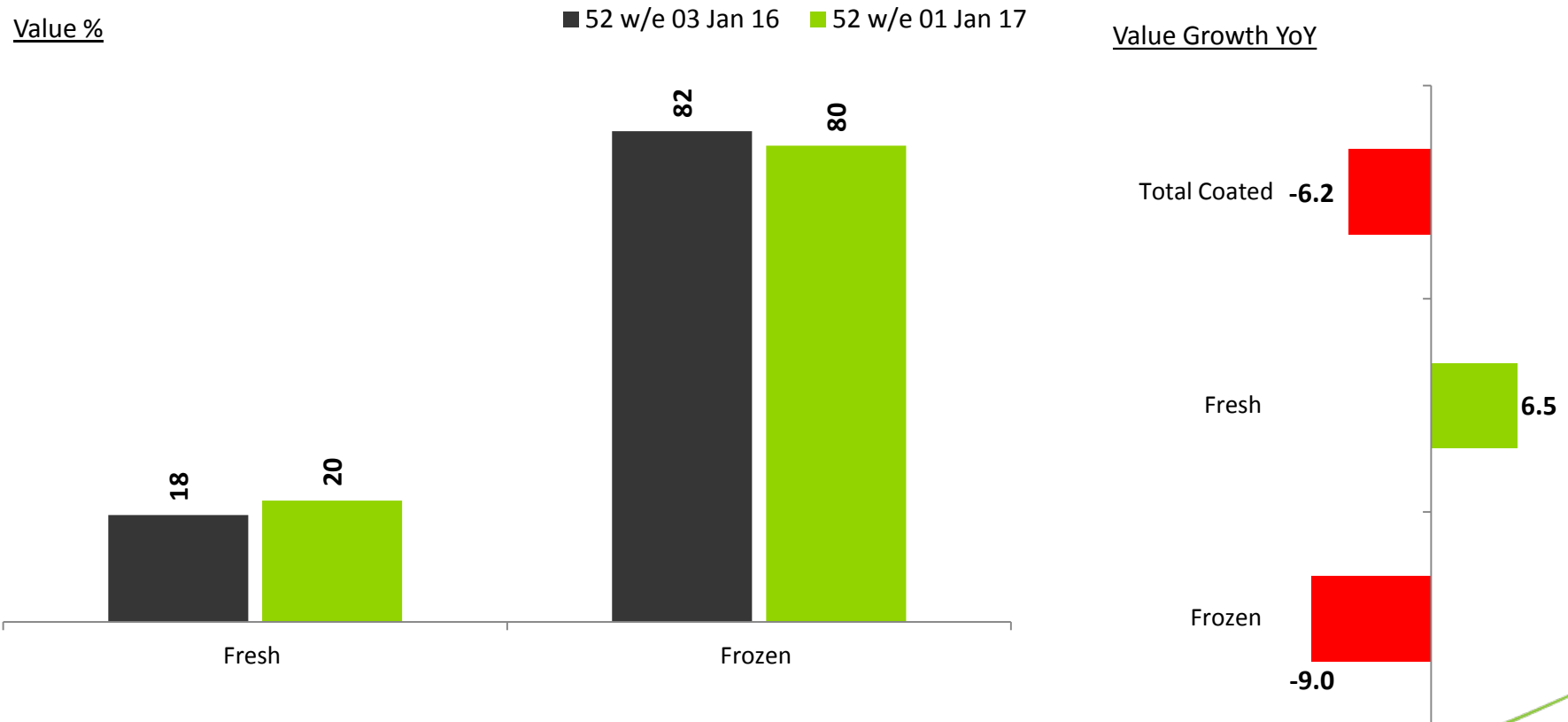
Total Species | Total Outlets | Total Market | Coated | 52 w/e | Previous Year



Source: Kantar Worldpanel. Data to 1st  
January 2017

## Fresh and Frozen Shares of Coated Fish

Growth in Fresh Coated fish has not been enough to offset the decline in Frozen.

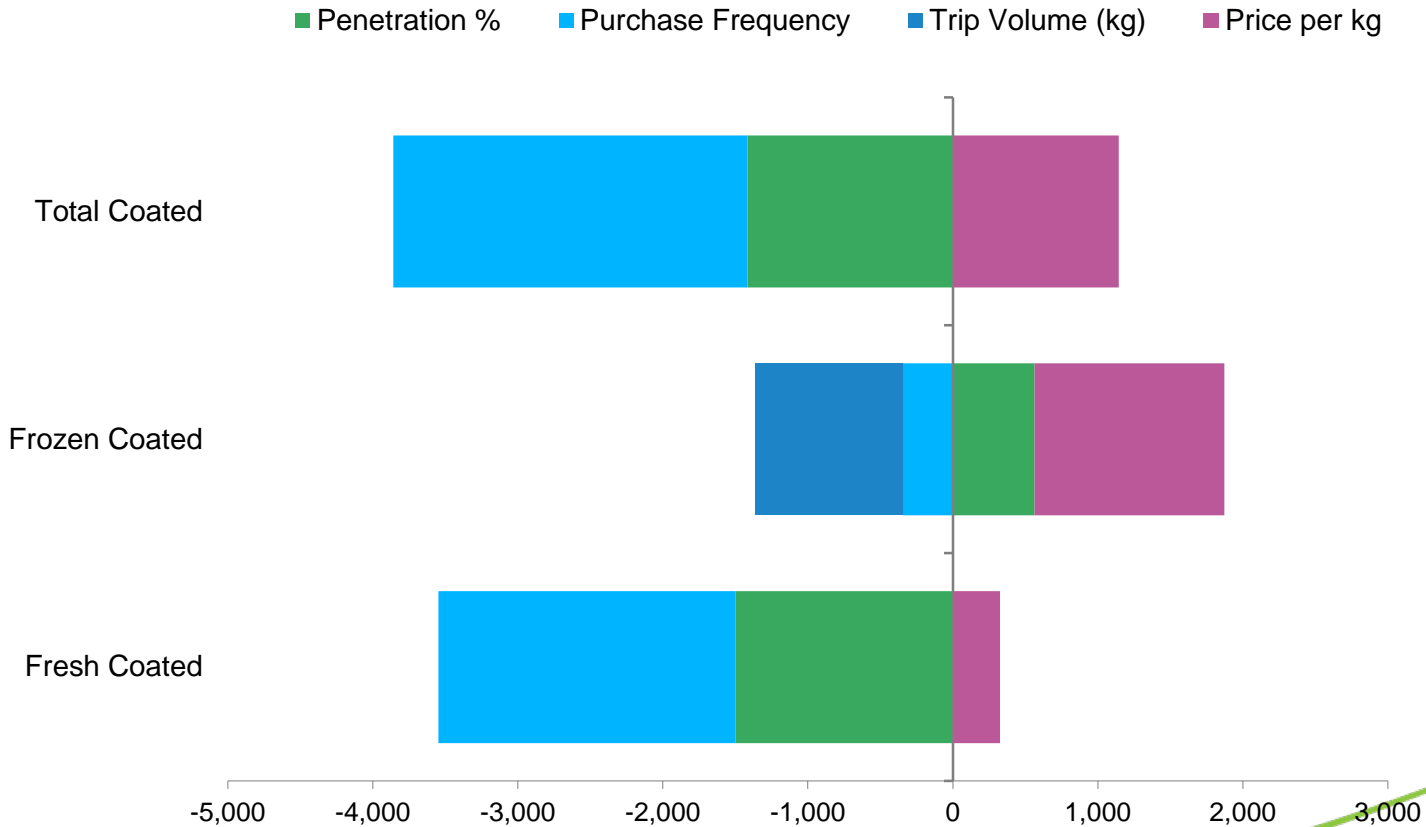


Source: Kantar Worldpanel. Data to 1st  
January 2017



## Fresh and Frozen Coated Fish Contribution to Growth

Although Frozen Coated is in decline, it has managed to recruit new shoppers.

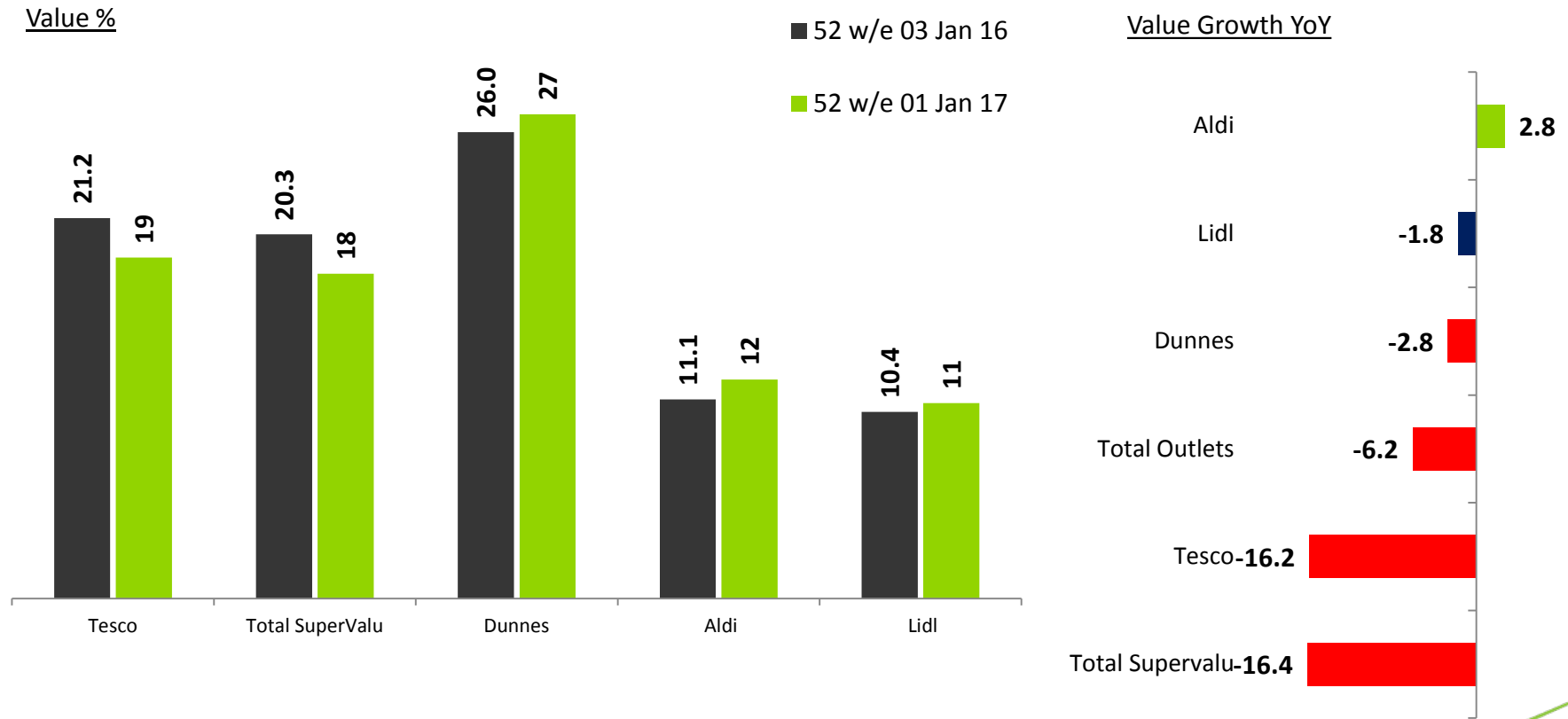


Source: Kantar Worldpanel. Data to 1st  
January 2017



## Coated Fish Retailers Value Share and Change

Aldi is the only retailer growing coated fish this year.



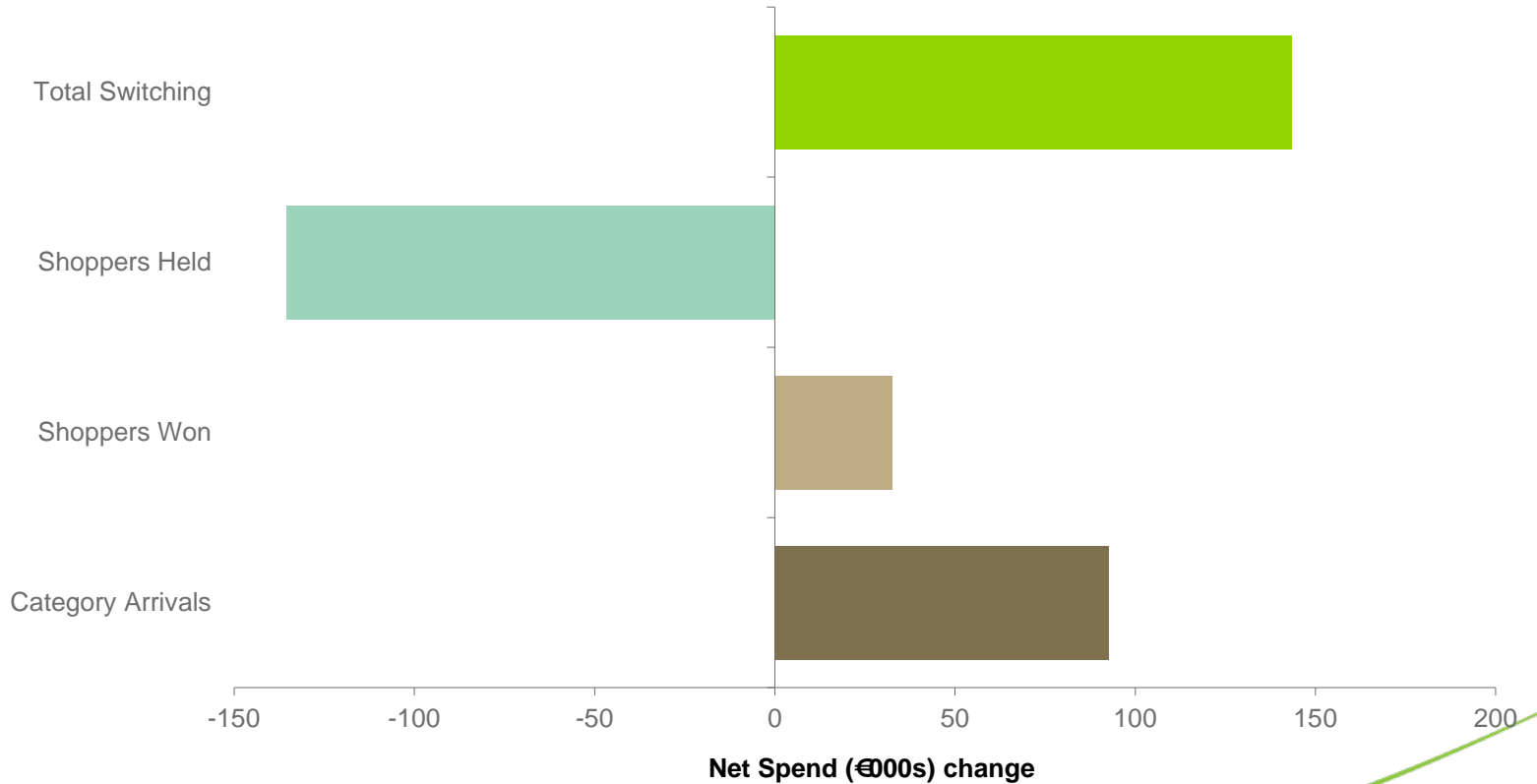
Source: Kantar Worldpanel. Data to 1st January 2017



## Aldi Coated Fish – Source of Change

Aldi are growing through incremental gains as well as switching.

Source of Aldi Coated Spend (€000s) Change - year ending 01 Jan 2017



Source: Kantar Worldpanel. Data to 1st  
January 2017



## Focus on Ready Meals



Source: Kantar Worldpanel. Data to 1st  
January 2017



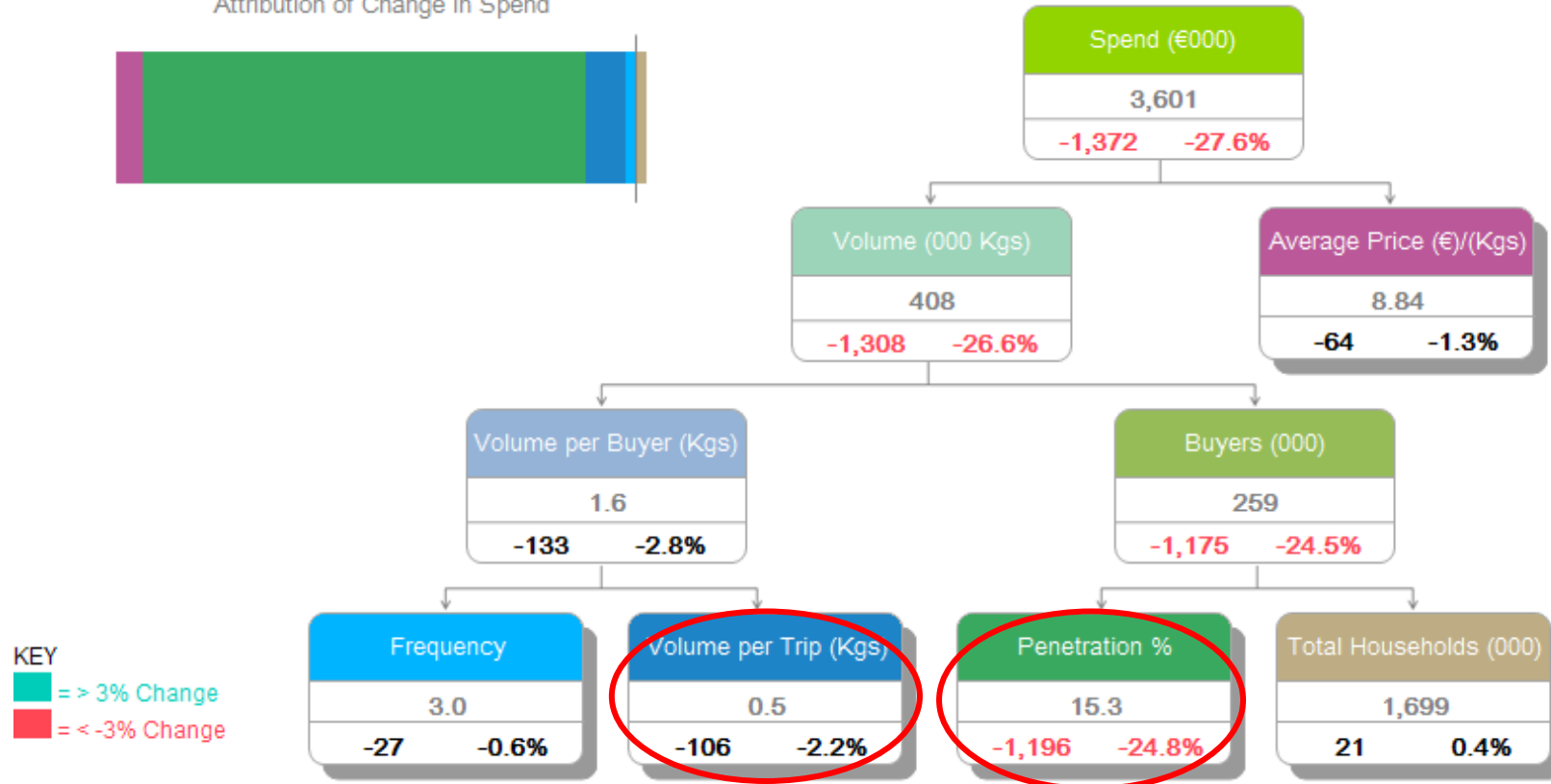
## Fish Ready Meals Drivers of Growth

Fish Ready Meals have declined significantly – largely due to less shoppers buying into the segment and shoppers buying less volume.

01-Jan-17 vs. Previous Year

Total Species | Total Outlets | Total Market | Ready Meal | 52 w/e | Previous Year

Attribution of Change in Spend



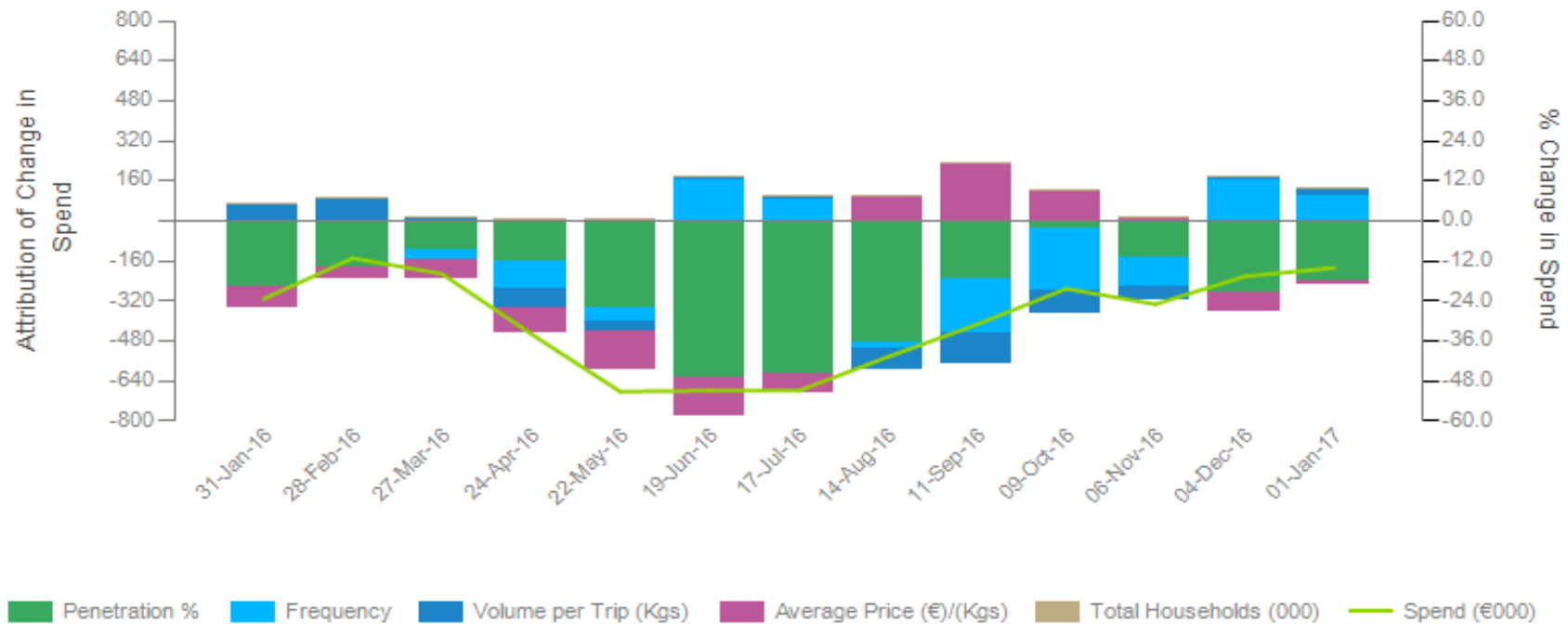
Source: Kantar Worldpanel. Data to 1st January 2017

## Fish Ready Meals Drivers of Growth Trended

Over the shorter term, decline has slowed somewhat. We can see that penetration has been the most consistent driver of decline over the past year.

vs. Previous Year

Total Species | Total Outlets | Total Market | Ready Meal | 12 w/e | Previous Year



Source: Kantar Worldpanel. Data to 1st January 2017



## Fresh and Frozen Shares of Fish Ready Meals

Frozen Ready Meals are capturing more share within this declining market.

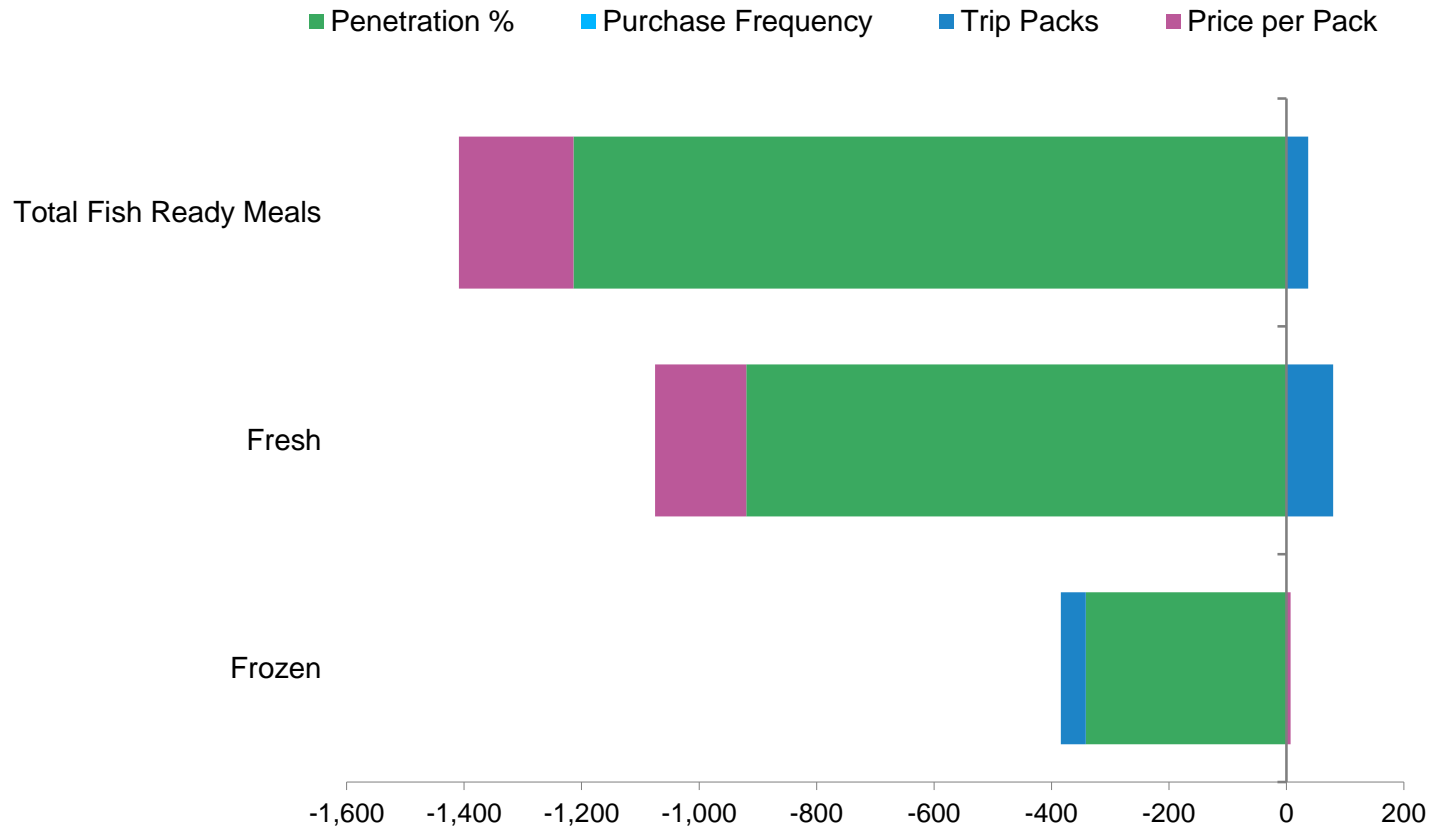


Source: Kantar Worldpanel. Data to 1st  
January 2017



## Fresh and Frozen Fish Ready Meals Contribution to Growth

Penetration is the biggest declining issue for both Fresh and Frozen.

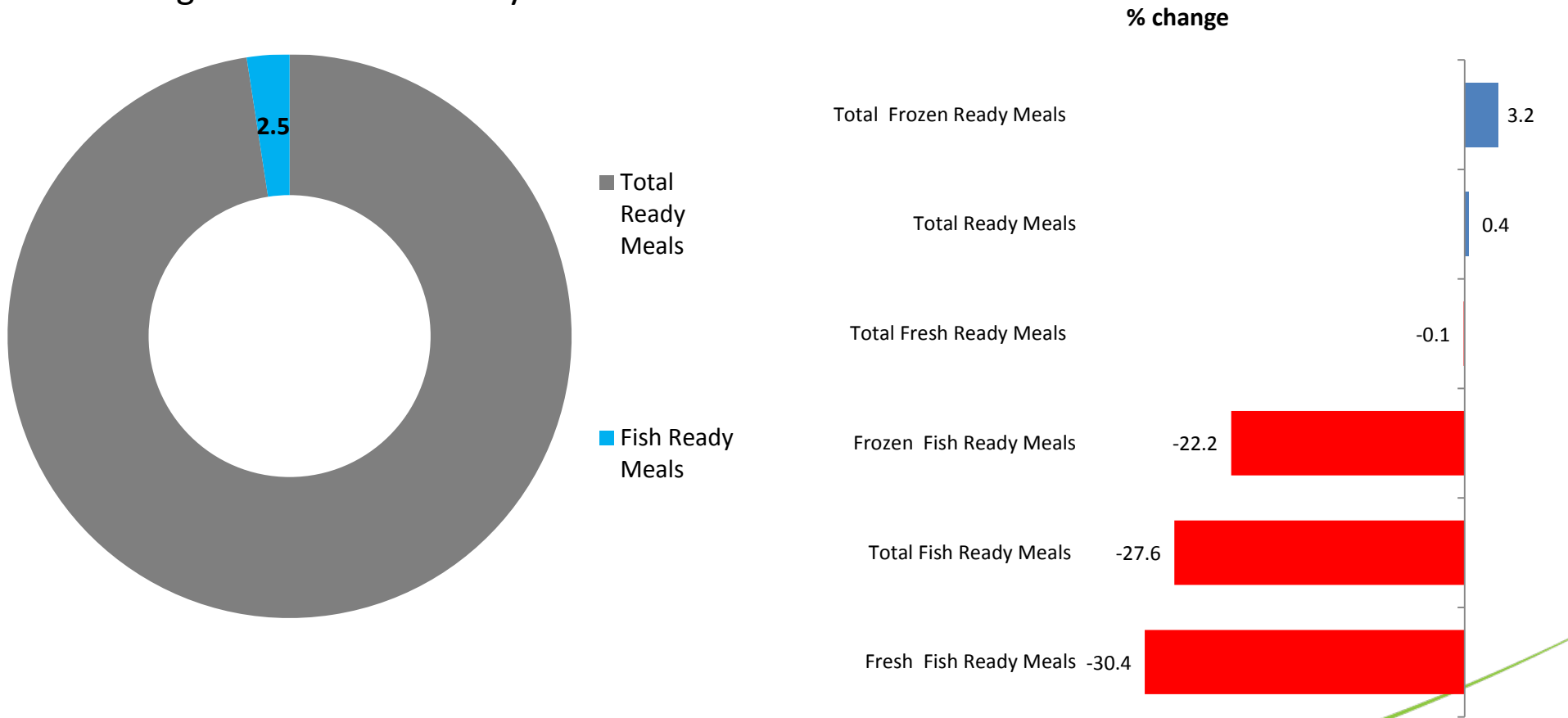


Source: Kantar Worldpanel. Data to 1st  
January 2017



## How do Fish Ready Meals compare to Total Ready Meals?

The performance of Fish Ready Meals is particularly disappointing when compared to the flat growth of Total Ready Meals.



\*Includes Fresh & Frozen Ready Meals Products

Source: Kantar Worldpanel. Data to 1st January 2017



# Insight

## Coated Market

Coated Fish is in decline in a health conscious market, driven by the Frozen sector. Aldi is the only retailer to grow Coated sales – driven in part by recruiting new shoppers into the category. These incremental gains show that there is opportunity to grow the category.

## Ready Meals

In contrast to Total Ready Meals, whose performance has remained flat, Fish Ready Meals have seen a dramatic decline in sales as fewer shoppers buy into the segment. Winning back shoppers is essential to the performance of this category.

# Focus on Prawns



Source: Kantar Worldpanel. Data to 1st  
January 2017



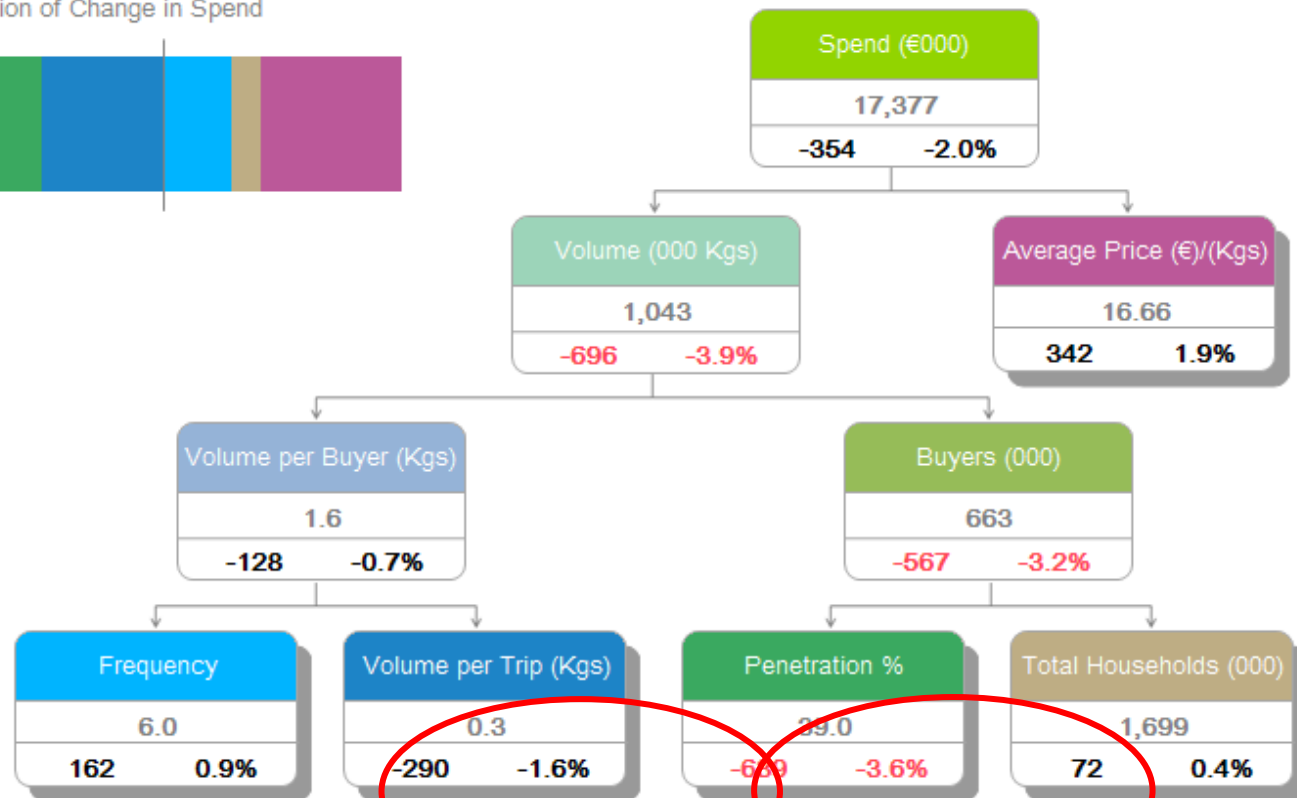
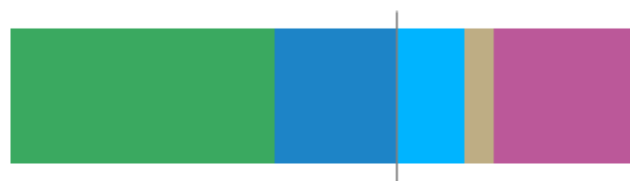
## Prawns Drivers of Growth

The value of Prawns is down YoY with volume losses and penetration decline being the biggest contributing factors.

01-Jan-17 vs. Previous Year

Total Prawns | Total Outlets | Total Market | Total Market | 52 w/e | Previous Year

Attribution of Change in Spend



### KEY

- = > 3% Change
- = < -3% Change

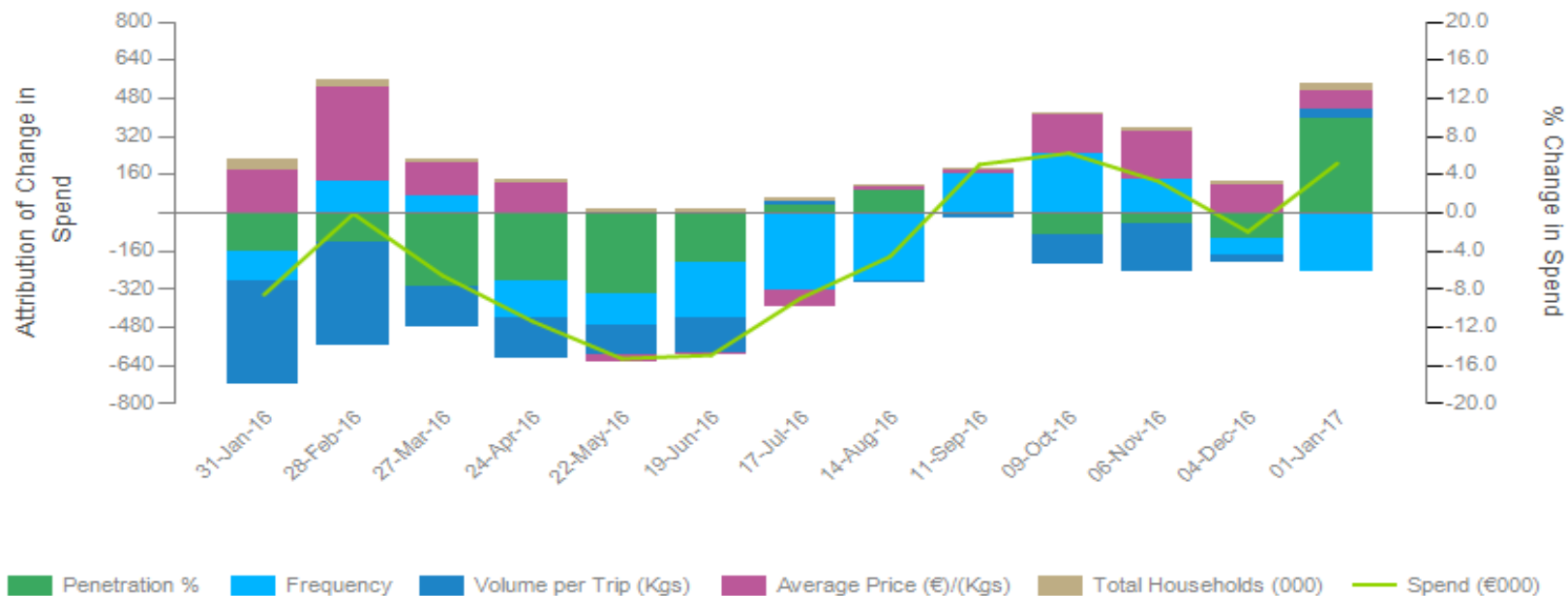
Source: Kantar Worldpanel. Data to 1st January 2017

## Prawns Drivers of Growth Trended

In the latest 12 w/e period, there has been some growth in the sector, driven by increased penetration.

vs. Previous Year

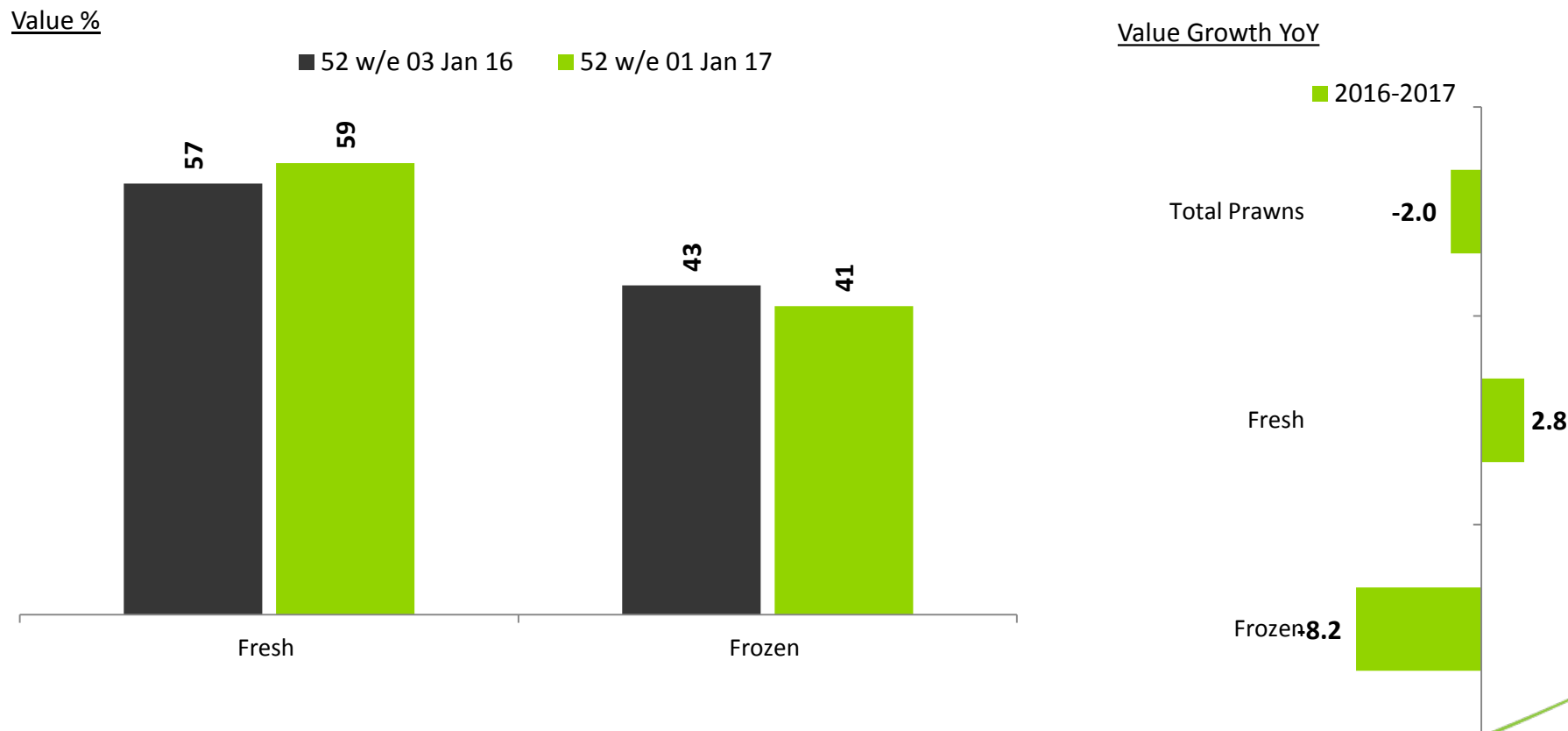
Total Prawns | Total Outlets | Total Market | Total Market | 12 w/e | Previous Year



Source: Kantar Worldpanel. Data to 1st January 2017

## Fresh and Frozen Shares of Prawns

Fresh prawns are in growth and have seen strong value share gains.



Source: Kantar Worldpanel. Data to 1st  
January 2017





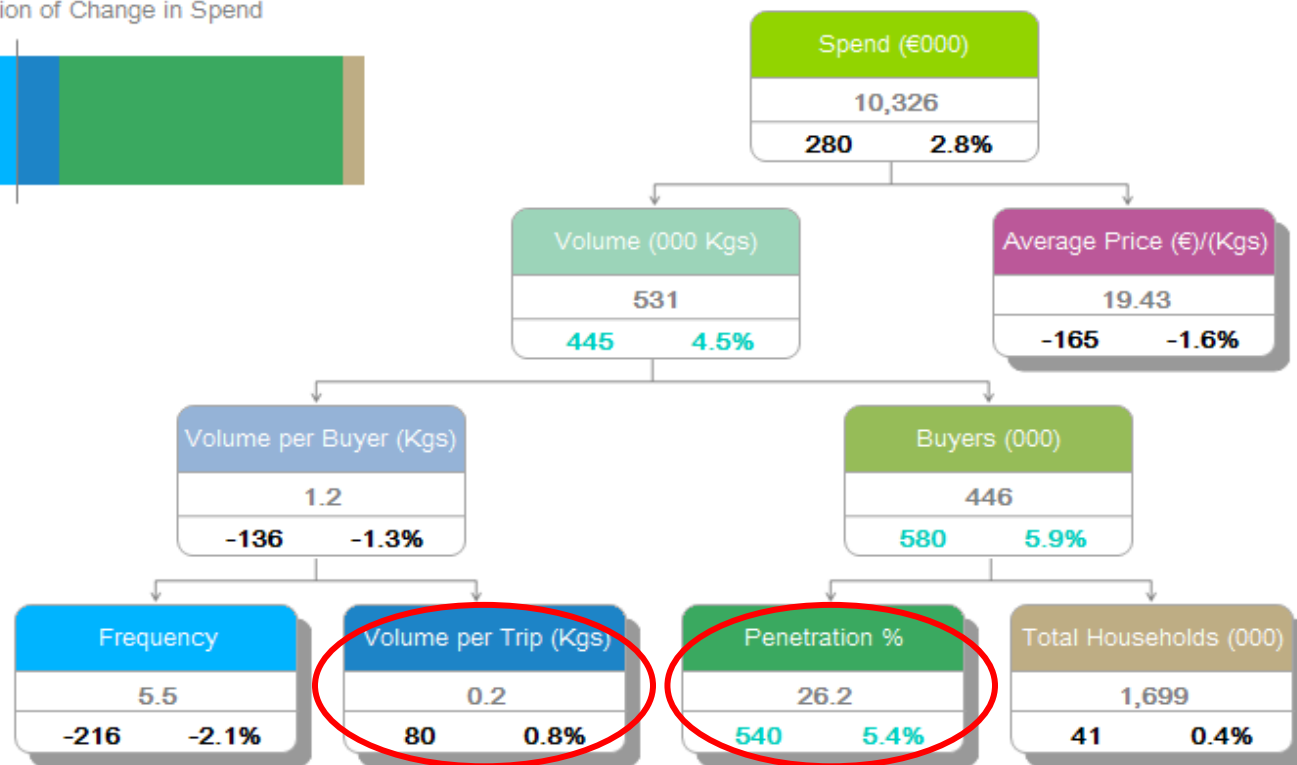
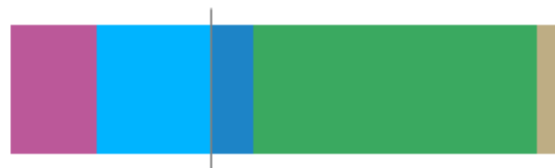
## Fresh Prawns

More shoppers are buying fresh prawns than LY, and shoppers are buying more volume.

01-Jan-17 vs. Previous Year

Total Prawns | Total Outlets | Fresh | Total Market | 52 w/e | Previous Year

Attribution of Change in Spend



### KEY

■ = > 3% Change  
■ = < -3% Change

Source: Kantar Worldpanel. Data to 1st  
January 2017

## Frozen Prawns

Frozen prawns have seen a significant decline since LY. This decline is driven by a loss of shoppers, and remaining shoppers buying less volume, less often.

01-Jan-17 vs. Previous Year

Total Prawns | Total Outlets | Frozen | Total Market | 52 w/e | Previous Year

Attribution of Change in Spend

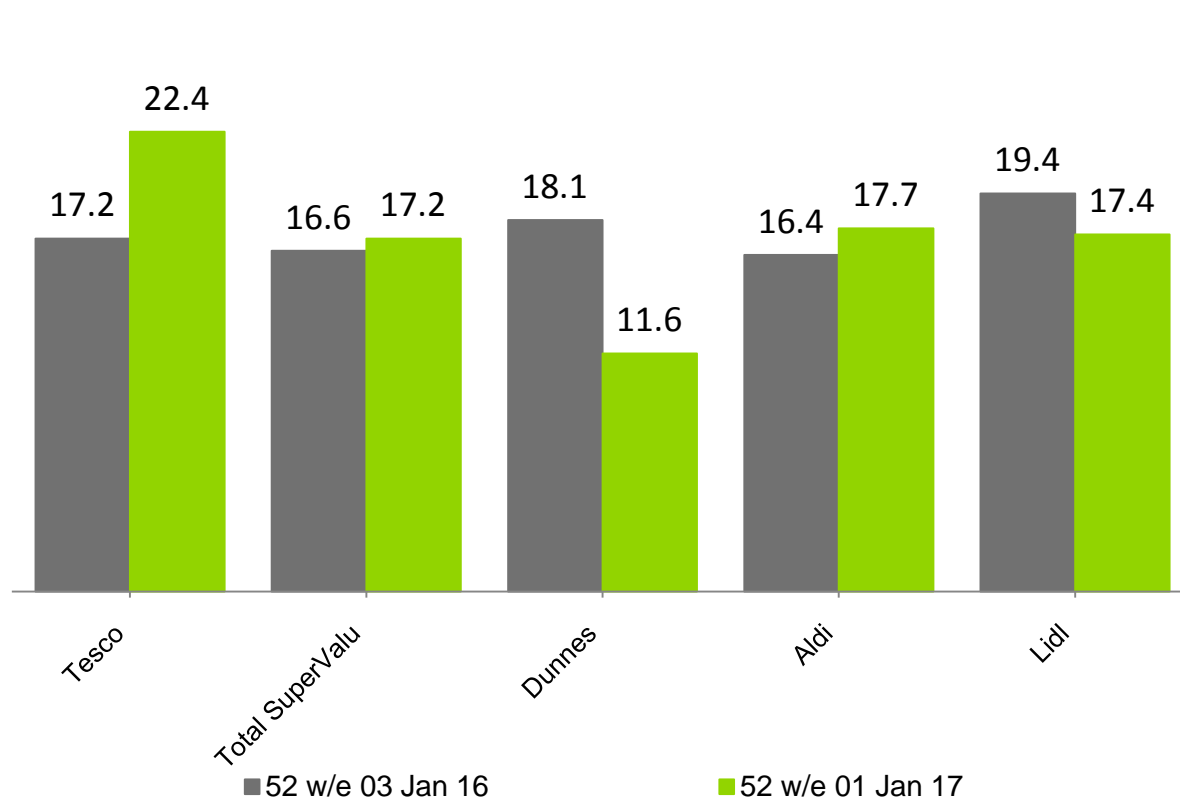


Source: Kantar Worldpanel. Data to 1st  
January 2017

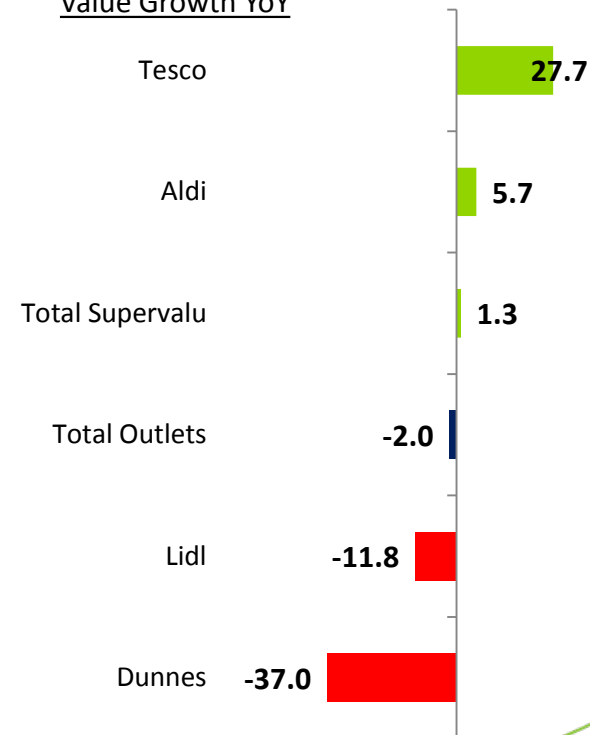
## Prawn Retailers Value Share and Change

The decline in prawns has been driven through Lidl and Dunnes.

Value %



Value Growth YoY



Source: Kantar Worldpanel. Data to 1st January 2017



# Focus on Mussels

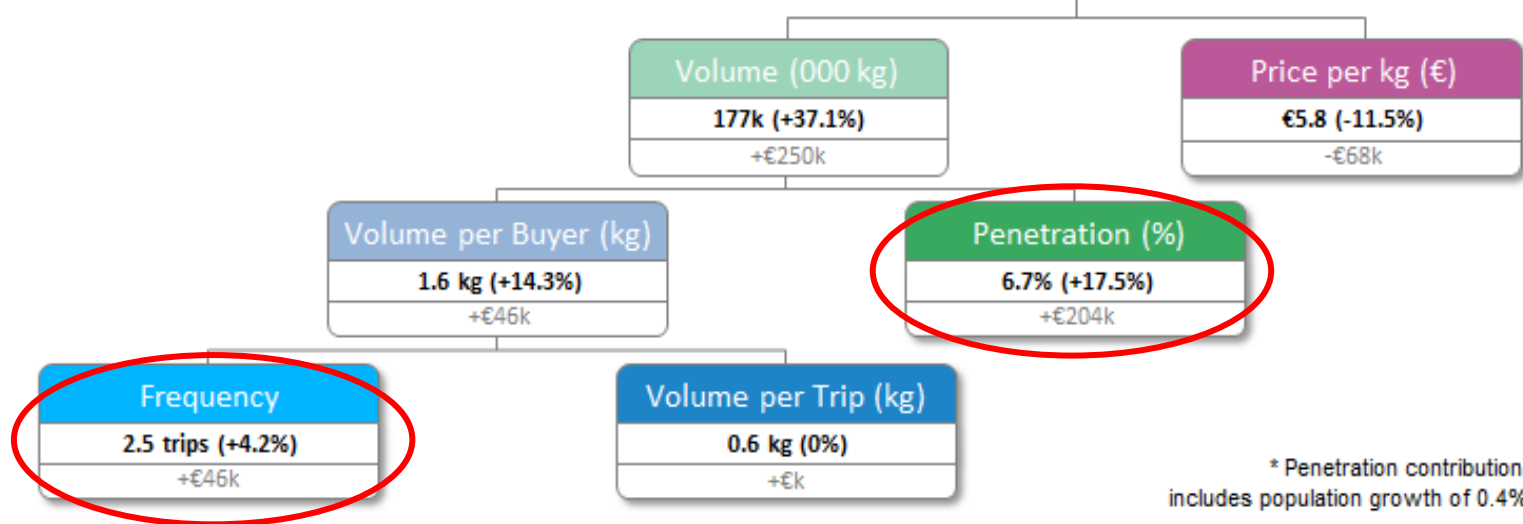
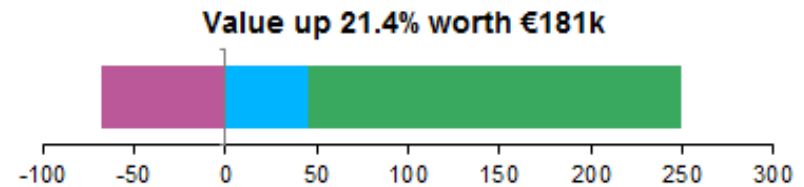


Source: Kantar Worldpanel. Data to 1st  
January 2017



# Mussels Drivers of Growth

Measure	52 w/e 03 Jan 16	52 w/e 01 Jan 17	Change (Actual)	Change (%)
Spend (€000)	847	1,029	+181	+21.4%
Volume (000 kg)	129	177	+48	+37.1%
Penetration (%)	5.70	6.70	+1.00	+17.5%
Frequency	2.40	2.50	+0.10	+4.2%
Spend per Buyer (£)	8.90	9.10	+0.20	+2.2%
Volume per Buyer (kg)	1.40	1.60	+0.20	+14.3%
Spend per Trip (€)	3.70	3.70	+0.00	+0.0%
Volume per Trip (kg)	0.60	0.60	+0.00	+0.0%
Price per kg (€)	6.55	5.80	-0.75	-11.5%



# Key Takeaways

- Fish is the most expensive meat on the market. Although this high average price is driving growth, it has had a detrimental effect on the volume and frequency that fish is purchased, as consumers are unwilling to continue paying higher prices.
- Frozen Fish is in decline, despite growth in the Total Frozen market. Dunnes is the only retailer to have grown the sales of Frozen Fish since last year. This can be largely attributed to their vouchering system, as consumers stock up on frozen foods.
- Fresh Fish continues to grow, as consumers buy into the category more often, at a higher price. Consumer behaviour is clearly driven by convenience and health concerns. This is evident in the growth of natural, flavoured and prepacked segments, as well as the decline in ready meals and whole fish.

Source: Kantar Worldpanel. Data to 1st  
January 2017



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