



Bord Iascaigh Mhara
Irish Sea Fisheries Board

Skin Packaging in the Retail Market



Location: London

Date: 30th November 2011

Conducted by: Cathriona Mc Carthy, BIM

Purpose of Trip:

To determine prevalence/ratio of skin packaging to other types of packaging (e.g. MAP/Vacuum etc) on a store/multiple basis.

Stores Visited:

1. **Morrisons:** Chalk Farm Road Camden Town, Greater London, NW1 8AA
2. **Tesco:** 100A West Cromwell Road, London, W14 8PB
3. **Sainsbury's:** 158A Cromwell Rd, London SW7 4EJ
4. **Waitrose:** 243 Kensington High Street, London, W8 6SA
5. **Whole Foods:** 63–97 Kensington High Street, Kensington, London, W8 5SE
6. **Selfridges:** 400 Oxford Street, London, W1A 1AB

Overview

- Study conducted on a day visit to London on Wednesday, 30th November 2011
- 4 main retailers visited (Morrisons, Tesco, Sainsbury's and Waitrose)
- Skin packaging predominantly seen in fresh fish in Tesco and Sainsbury's, not as predominant in Morrisons or Waitrose.
- Interesting new products/packaging:





1. Morrisons

Chalk Farm Road, Camden Town, Greater London, NW1 8AA

Overview:

The store had a very well stocked chill cabinet situated next to the fresh fish counter. It contained many different species and offered good variety and choice.

Types of Packaging:

There were a number of different types of packaging on the shelf in Morrisons but there was very little skin packaged products on the shelves.

The types of packaging found were:

- Skin Packed

There was a very small amount of skin packaged products in Morrisons. The following were available:

- Youngs 2 Smoked Basa Fillets 250g £2.49 (Skinless/Boneless; Fish for Life)
- Saucy Fish Company 2 Salmon Fillets w Watercress Sauce 270g £4.00
- Saucy Fish Company Smoked Haddock w Mustard & Dill Vinegarett 270g £4.00
- Morrisons Hot Smoked Selection Pack 200g £3.49 (Hanging Pack)
- Sweet Cured Kiln Smoked Mackerel £15.90/kg (Approx 6 per pack; Hanging Pack; USP: Hand Filleted and Boneless)

- Foam Tray

The predominant raw fish was presented in Styrofoam packs with parsley which had the Morrisons "Your Fishmonger" label on them and looked to be prepared in store. Species available were Cod, Haddock, Mackerel, Sprat, Plaice, Kippers, Octopus, Swordfish, Sardines, Whole Mackerel and

Salmon. 90% of the fresh prepack fish on sale in Morrisons was in this product range. All were individually priced based on a per kg price.

- Vacuum Packed

There was a steamed salmon fillet 100g which was vacuum packed, ready to eat and priced at £2.25
There was also Scottish Mussels vacuum packed in a cardboard packet in a number of sauces (Thai Green, Garlic Butter, White Wine). All were 500g and priced at £2.79 and contained no artificial colours or flavours.

There were a number of Kipper and Mackerel products in hanging Vacuum Packaging – Kippers 200g £0.89; Mackerel £0.84/kg and Scottish Smoked Mackerel £0.90/kg

- MAP Pack

There were a number of products in this type of packaging. The only raw fish was Salmon Fillets Boneless (2) in 240g pack priced at £4.00 and a Fish Pie Mix 340g @ £4.00

There were some a large number of prawn products in this form of packaging including

- Perfect Catch Shell On RTE Prawns 205g £1.35
- Fantail King Prawn RTE 180g £3.19
- Chilli King Prawn RTE 170g £3.19
- King Prawn RTE 182g £3.19
- Cocktail Prawn RTE 95g £1.15
- Large Prawns RTE 160g £2.39
- Coldwater Prawns (Value Range) RTE 220g £1.99
- King Prawns (Raw) 202g £3.19
- The Best Organic King Prawn 121g £3.49
- The Best XL Canadian Prawns 175g £2.99
- The Best Honduran Jumbo Prawn 130g £3.49

Other products included

- Raw Scallops 180g £3.69 (MSC Labelled)
- Seafood Selection - RTE 234g £2.19
- Cooked & Shelled Mussels – RTE 175g £1.09
- Scottish Salmon Honey Roast Salmon Flakes 145g £2.99
- Scottish Salmon Chilli & Coriander Salmon Flakes 145g £2.99
- Smoked Lemon & Parsley Mackerel £9.50/kg
- Smoked Peppered Mackerel £9.50/kg
- Smoked Mexicana Mackerel £9.50/kg

- Jars

There were Parsons Pickled Mussels 280g £1.79; 155g £1.09 and Parsons Pickled Cockles 280g £1.99; 155g £1.09 available in glass jars

- Tubs

There was a number of products available in tubs

- Herring in Cherry Wine 280g £1.69 (Orkney RTE, Rich in Omega 3)
- Crayfish in sweet chilli 180g £2.49 (Orkney RTE, Rich in Omega 3)
- Morrisons Roll mop Herring 260g £1.09 (MSC Certified)

- Morrisons Sweet Marinated Herring 280g £1.59 (MSC Certified)
- Bradley's Jellied Eels 200g £2.39

NOTE: In the freezer section Morrisons had the following Langoustine product packed in a MAP tray.





2. Tesco, 100A West Cromwell Road, London, W14 8PB

Overview:

The store had 2 well stocked chill cabinets situated alongside and behind the fresh fish counter. It contained many different species and offered good variety and choice. Tesco had a large amount of skin packaged products available and the roughly 60% of the fresh raw fish was in this type of packaging

Types of Packaging:

There were a number of different types of packaging on the shelf Tesco

The types of packaging found were:

- Skin Packed





There was a large amount of skin packaged products in Tesco. There was a large range of species covered in Tesco Labelled Products. The following were available:

- Tesco River Cobbler 265g £2.00
- Tesco Smoked River Cobbler 250g £2.00
- Tesco Finest Smoked Undyed Smoked Haddock £10.87/kg
- Tesco Finest Boneless Sea Bass £18.98/kg
- Tesco Finest Traditional Line Caught Boneless Smoked Salmon Filler £17.27/kg
- Tesco Organic Salmon Fillet £17.99/kg
- Tesco Mackerel Fillets 180g £2.00 (with Seasoning)
- Tesco Sardines Fillets 300g £3.00
- Tesco Haddock £10.96/kg
- Tesco Smoked Cod £10.96/kg
- Tesco Smoked Haddock £8.79/kg
- Tesco Plaice £10.00/kg
- Tesco Cod £10.96/kg
- Tesco Skinless & Boneless Cod £17.00/kg
- The Saucy Fish Co Salmon Fillets w Watercress 270g £4.00
- The Saucy Fish Co Sea Bass w Beurre Blanc & Dill Dressing 230g £4.00
- The Saucy Fish Co Salmon Fillets w Chilli, Lime & Ginger 280g £4.00
- Tesco Boneless Salmon Side 1kg £10.00 (on offer, normally retails at £20.00)





There was also a large number of Ready to Eat Mackerel and Salmon which are skin packed and in shelf ready boxes

- West Country Pepper Smoked Mackerel 160g £2.00 (USP: Provenance Smoked in Dartmouth)
- Tesco Smoked Mackerel w Crushed Peppercorns £8.97/kg (USP: All mackerel products RTE contain the names of area “Caught In; Catch Method”; Source Omega 3/Ready to Eat/Responsibly Sourced on front of packaging)
- Steamed Salmon £21.63/kg (USP: Area farmed in named; responsibly sourced; omega 3; ready to eat all on front of packaging)
- Kiln Roasted Salmon Fillet with Sweet Chilli/Cracked Black Pepper/Lemon & Parsley
- Scottish Smoked Mackerel 260g £2.50

- MAP Pack



There were a number of products in this type of packaging. The only raw fish were Scottish Loch Trout Fillets 220g £4.00, Tuna Steaks Line Caught £19.98/kg and a Fish Pie Mix 320g @ £2.70 (Note the way the fish pie mix is packaged with the different fish in different sections)

There were some a large number of prawn products in this form of packaging including

- Tesco Finest Black Tiger Prawns Cooked & Peeled 160g £4.00
- Tesco Organic King Prawn 170g £3.00
- Tesco Raw Peeled King Prawn 200g £3.00
- Tesco Cooked & Peeled King Prawn 175g £3.00

- Tesco Cooked & Peeled King Prawn w Chilli & Coriander 160g £3.00
- Tesco Finest Coldwater Prawns Peeled & Cooked RTE 190g £3.50
- Tesco Cooked & Peeled Coldwater Prawns 200g £2.45

Other products included

- Tesco Raw Scallops 160g £3.50
- Tesco Cooked Seafood Selection - RTE 230g £3.00
- Tesco Cooked & Shelled Mussels – RTE 240g £1.25



- Tubs

There were a number of products available in tubs:

- Bradley's Traditional Jellied Eel 200g £1.98
- Tesco Roll mop Herrings 260g £1.08

Sainsbury's

3. Sainsbury's, 158A Cromwell Rd, London SW7 4EJ

Overview:

The store had a very well stocked chill cabinets situated in an aisle but not directly next to the fish counter. It contained many different species and offered good variety and choice. Sainsbury's had a large amount of skin packaged products available and the roughly 60% of the fresh raw fish was in this type of packaging

Types of Packaging:

There were a number of different types of packaging on the shelf Tesco

The types of packaging found were:

- Skin Packed





There was a large amount of skin packaged products in Sainsbury's. The majority of skin packed product range of species was covered in Sainsbury's Own Labelled Products. The following were available:

- Sainsbury's Skinless & Boneless Salmon Fillets 240g £4.00
- Sainsbury's Taste The Difference 2 Corsican Sea bass Fillets £32.99/kg
- Sainsbury's Skinless & Boneless Smoked Haddock Fillets £10.96/kg (USP: Responsibly Sourced/Line Caught)
- Sainsbury's Smoked Cod Fillets £10.98/kg
- Sainsbury's Smoked Haddock Fillets £10.98/kg
- Sainsbury's Skinless & Boneless Haddock £13.99/kg
- Sainsbury's Cod Fillets £10.96/kg
- Sainsbury's Large Haddock Fillets £10.96/kg
- Sainsbury's Lemon Sole £11.96/kg
- Sainsbury's Taste The Difference Haddock Loins £16.48/kg
- Sainsbury's 2 Boneless Scottish Salmon Fillets 240g £4.00
- Sainsbury's Organic Salmon Fillets £17.99/kg
- Sainsbury's 2 Wild Alaskan Keta Salmon 230g £3.00
- Sainsbury's Taste The Difference Scottish Salmon Fillets 240g £4.89
- Sainsbury's Taste The Difference 2 Wild Alaskan Salmon 230g £4.00
- Sainsbury's Taste The Difference Skinless Cod Loin £16.99/kg
- The Saucy Fish Co Smoked Haddock w Mustard & Dill 270g £4.00
- The Saucy Fish CO Salmon Fillets w Chilli, Lime & Ginger 280g £4.00

- Sainsbury's British Mackerel Fillets (4) £9.38/kg
- Sainsbury's 2 Yellow fin Tuna Steak £21.97/kg
- Sainsbury's Taste The Difference Line Caught Yellow fin Tuna Steaks 130g £4.00
- Sainsbury's 2 Scottish Salmon Steaks Responsibly Sourced 350g £4.09

There were some a large number of prawn products in this form of packaging including

- Sainsbury's Raw King Prawns 180g £3.29
- Sainsbury's Taste The Difference Responsibly Sourced Coldwater Prawns 220g £3.39
- Sainsbury's Taste The Difference Ecuador Shell On King Prawn 160g £3.29 (Responsibly Sourced)
- Sainsbury's Tail On King Prawn 180g £3.29 (Responsibly Sourced)
- Sainsbury's King Prawn 180g £3.29 (Responsibly Sourced)
- Lyons Shell On Prawns 250g £1.79
- Sainsbury's Basics Cooked & Peeled Prawns 260g £2.39
- Sainsbury's Peeled Prawns 200g £2.99
- Sainsbury's Taste The Difference Large King Prawn 190g £3.49
- Sainsbury's SO Organic Ecuadorian Jumbo King Prawns 175g £4.29

Other products included

- Sainsbury's Tilapia Asian Spiced 210g £3.99
- Lyons Crayfish Medley 180g £2.99
- Sainsbury's Seafood Selection 225g £3.29
- Sainsbury's Scallops 180g £4.00
- Sainsbury's Taste The Difference Scallops 180g £5.95

- Vacuum Packed

There was cooked mussels vacuum packed in boxes packaged with Garlic Butter/White Wine in 500g packs at £2.99 per product.

- Tubs

There were a small number of products in tubs:

- Bradley's Traditional Jellied Eels 200g £2.39
- Mrs Elswood Sweet Herring Fillets Marinated with Onions 500g £3.21
- Sainsbury's Marinated Anchovies 200g £3.25

Overview:

The store was not a very large Waitrose. It had a 2 well stocked chill cabinets situated in an aisle near but not directly beside the fish counter. It contained many different species and offered good variety and choice. Waitrose had a large amount of skin packaged mackerel/kipper/salmon ready to eat products available but the majority of the fresh raw fish was in the MAP type of packaging

Types of Packaging:

There were a number of different types of packaging on the shelf Waitrose

The types of packaging found were:

- Skin Packed



There was a large amount of ready to eat skin packaged products in Waitrose. The majority of skin packaged product range of species was Waitrose Own Labelled Products. The following were available:

- Essential Waitrose Smoked Mackerel Fillets £10.35/kg
- Waitrose Hot Smoked Mackerel Fillet Selection £11.99/kg
- Waitrose Hot Smoked Mackerel Split Fillets £14.99/kg
- Waitrose Hot Smoked Mackerel with Honey & Soya Marinade £11.99/kg
- Waitrose Smoked Mackerel Fillet with Crushed Peppercorns 240g £2.88
- Waitrose Wild Alaskan Smoked Salmon 100g £1.89
- Waitrose Smoked Salmon 100g £1.59
- Waitrose Smoked Trout 100g £1.89

- Waitrose Smoked Mackerel 100g £1.25
- Waitrose Smoked Hot Salmon 160g £4.89
- Waitrose Poached Salmon 170g £4.99
- Waitrose Hot Smoked Trout 125g £3.29
- Coln Valley Smokery Kiln Roast Salmon 160g £4.49

- MAP Pack



The majority of all raw fish was in this type of packaging. The fish products included:

- Waitrose Dab Fillets 181g £1.99
- Waitrose Cornish Brill Fillets Skin On 283g £7.07
- Waitrose Halibut Steak 210g £5.25
- Waitrose Icelandic Prime Plaice Fillets £13.99/kg
- Waitrose Plaice Fillets £11.99/kg
- Waitrose Torbay Sole Fillets £15.99/kg
- Waitrose Whole Dover Sole £22.99/kg
- New England Seafood Diced Tuna Fillet 250g £2.99
- Waitrose Prime Tuna Steaks 240g £6.99
- New England Seafood Chilli & Coriander Tilapia 230g £3.99
- Waitrose Fish Pie Mix £14.49/kg
- Waitrose Fresh Hake Fillets £15.99/kg

- Waitrose Smoked Haddock Fillet Undyed £14.49/kg
- Waitrose Smoked Haddock Fillet Dyed £14.49/kg
- Waitrose Smoked Haddock Fillets £12.63/kg
- Waitrose Smoked Prime Cod Fillet £16.99/kg
- Waitrose Lightly Smoked Select Farm Salmon Fillets 260g £5.19
- New England Seafood Wild Alaskan Salmon Fillets 220g £4.00
- Waitrose Sustainably Sourced Line Caught Tuna 240g £6.99
- Waitrose Sustainably Sourced Line Caught Icelandic Cod £18.49/kg
- Waitrose Sustainably Sourced Line Caught Haddock £17.99/kg

There were some a large number of prawn products in this form of packaging including

- Waitrose Organic Raw, Peeled King Prawn Tails (150g) £3.99
- Waitrose Cooked & Peeled Large Prawns 100g £2.49
- Waitrose Cooked & Peeled Indonesian Tiger Prawns 160g £5.49
- Waitrose Cooked & Peeled King Prawn 300g £5.99
- Waitrose Freshly Cooked & Peeled Indonesian King Prawn Tails 150g £3.99
- Waitrose Freshly Cooked Chilli, Coriander & Lime King Prawns 140g £3.49
- Waitrose Icelandic Cooked & Peeled Prawns 200g £3.29
- Waitrose Raw Peeled Indonesian King Prawn Tails 200g £3.79

Other products included

- Waitrose MSC Patagonian Roe less Scallops 200g £4.89
- Waitrose Prepared & Cooked Rope Grown Mussels 180g £1.49
- New England Seafood Scallops 200g £5.99
- Waitrose Seafood Cocktail 250g £3.79

- Tubs



There were a large number of products in tub containers in Waitrose with a large selection of The Big Prawn Company products available as per picture above.

Conclusion

This visit has shown the growth in the range of seafood which is packaged using Skin Pack and MAP technology. It would appear that there are opportunities for further developments in this area on both the UK and Irish markets.