SEAFISH

Market Insight Factsheet

Chilled Seafood in Multiple Retail 2017

This factsheet provides a summary of the performance of the chilled seafood sector in the multiple retail seafood market.

The chilled seafood sector continues to take the largest share of the multiple retail seafood market with a wide range of segments and species. It is the only seafood sector in growth since 2007. Opportunities to grow the category exist around product formats, flavours, mission and channel.

This document will examine the detail behind the performance of the chilled seafood sector, specifically:

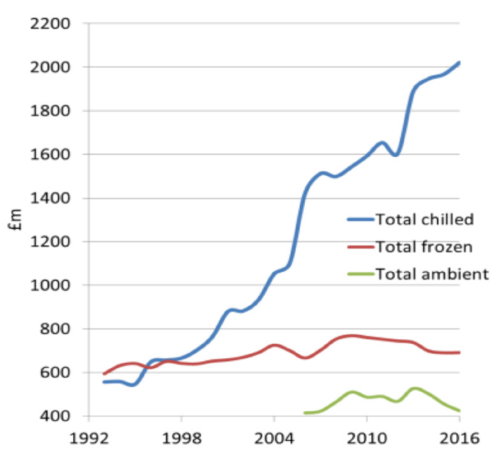
- Historic retail seafood sector trends
- Current seafood sector performance
- Chilled seafood KPIs
- Chilled seafood segment performance
- Chilled seafood species performance
- Chilled seafood shopper
- Chilled seafood shopper missions
- Chilled seafood channels.

Historic Retail Seafood Sector Trends

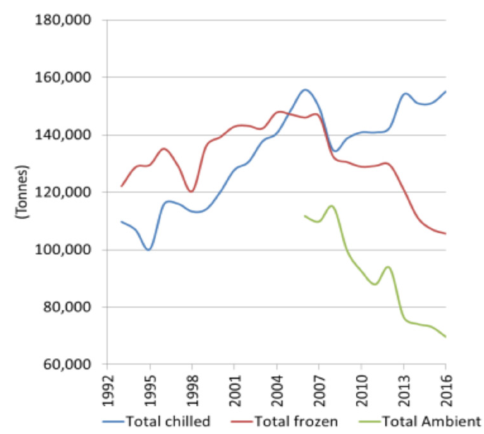
Chilled seafood has grown in popularity with British retail shoppers over the past 20 years. In the late 1990's both the volume and value of chilled seafood began to rise faster than that of frozen seafood. By 2005, chilled seafood had overtaken frozen seafood in volume sales. Overall GB seafood consumption had been growing slowly but steadily until recession hit in 2007, when the relatively high price of seafood meant it struggled to compete with cheaper proteins.

From 2007, seafood in multiple retail experienced a sustained period of inflation and price driven growth as consumption fell. Around 2009, retail shoppers became polarized, saving money where possible on basics, but not averse to spending more on quality. Austerity focused shoppers prioritised 'value for money', and the perceived 'superior freshness, health and quality' of chilled seafood resulted in continued growth of the chilled sector at the expense of frozen and ambient, despite it being double the average price. In October 2016, total seafood, which includes chilled, frozen and ambient varieties, finally returned to full growth for a short period before volume returned to decline in January 2017.

Long Term Seafood Sector Value Trends



Long Term Seafood Sector Volume Trends



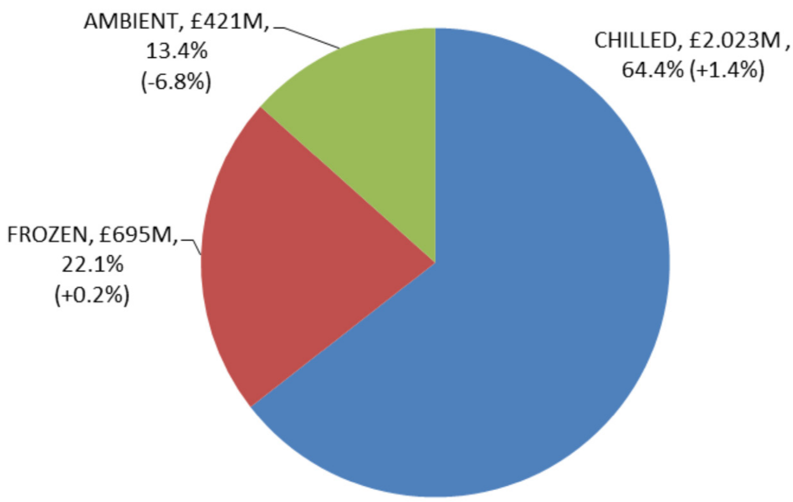
(Nielsen Scantrack –52wks to 25.3.17)

Current Seafood Sector Performance

Seafish has detailed EPOS data (Electronic Point of Sale) available for the past nine years, which can be used to get a long-term picture of the changes in the seafood sectors, segments and species.

In March 2017, total GB retail seafood sales were worth £3.14bn (+0.7%), with a volume of 327,004 tonnes (-0.8%) and an average price of £9.60/kg (+1.5%) (Nielsen Scantrack: 52 weeks to 25.3.17 excludes discounters). Over the nine years from 2008 to March 2017, total seafood has been in price driven growth, with volume down by -16% and value up by 16%, pushing average price up by 18%.

Sector Value Share of Seafood 2017



(Nielsen Scantrack –52wks to 25.3.1 - % Share Chg)

Chilled Seafood

Chilled seafood continued to dominate the GB seafood retail market in 2017, with value and volume worth £2.02bn (+1.4%) and 153,893 tonnes (+1.8%) respectively; with an average price of £13.15/kg (0.3%). This represents a 64.4% share of the seafood retail market by value and 47.1% by volume. Over the nine years from 2008 to 2017, chilled seafood increased its retail volume share by 31.9%, whilst frozen and ambient have decreased by -8.3% and -29% respectively.

Chilled Seafood KPIs

In 2017, there was an increase in the number of shoppers buying chilled seafood despite price increases. Chilled seafood KPIs (key performance indicators), as set out in this table, show penetration is high, with 81.6% of shoppers buying chilled seafood. Compared with the previous year, more shoppers bought chilled seafood, more often, but with smaller baskets. Chilled seafood shoppers bought on average 0.4kg of chilled fish per trip spending £4.39; and bought chilled seafood 20.3 times per year, spending a total of £88.80, equating to 7.8kg/yr.

Chilled Seafood KPI's

		Pen %	Freq	AWOP (Kg) 52w	Avg Spend (£) 52w	Trip Spend (£)	Price per Kg	Avg Trip Kg
TOTAL FISH	26 MAR 2016	96.85	30.31	15.27	£120.84	£3.99	£7.91	0.50
	25 MAR 2017	96.89	30.79	15.12	£123.92	£4.02	£8.19	0.49
	% Change	0.0	1.6	-1.0	2.5	0.9	3.6	-2.5
AMBIENT	26 MAR 2016	80.64	9.38	4.06	£22.00	£2.35	£5.42	0.43
	25 MAR 2017	79.79	9.39	3.99	£21.38	£2.28	£5.35	0.42
	% Change	-1.1	0.1	-1.7	-2.8	-2.9	-1.2	-1.8
CHILLED	26 MAR 2016	80.52	19.61	7.83	£85.29	£4.35	£10.89	0.40
	25 MAR 2017	81.64	20.25	7.81	£88.80	£4.39	£11.37	0.39
	% Change	1.4	3.3	-0.3	4.1	0.8	4.4	-3.4
FROZEN	26 MAR 2016	87.18	10.95	5.98	£35.13	£3.21	£5.87	0.55
	25 MAR 2017	86.62	10.79	5.88	£35.21	£3.26	£5.99	0.54
	% Change	-0.6	-1.5	-1.7	0.2	1.7	2.0	-0.2

Chilled Seafood Segment Performance

It is the chilled natural segment (i.e. includes no additional ingredients), which takes the largest share by both volume (46%) and value (58%) of the chilled seafood sector.

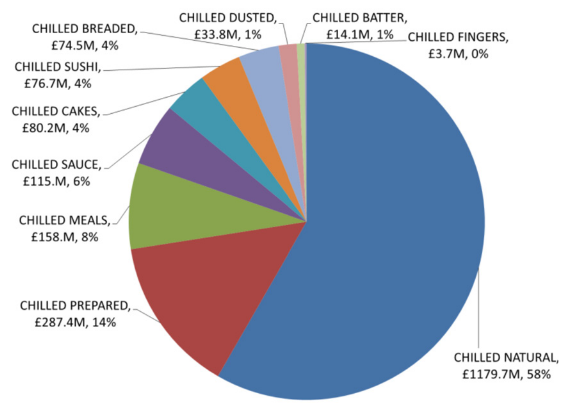
> By driving long term growth in this sector, chilled natural ultimately drives the GB seafood market; being worth more than the total frozen and total ambient seafood sectors combined.

Chilled prepared (14%), chilled meals (8%) and chilled sauce (6%) are ranked second, third and fourth, respectively by value share. In the 52wks to 25th March 2017, chilled natural was worth £1.18bn (+0.1%), with 71,325 (-0.5%) tonnes.

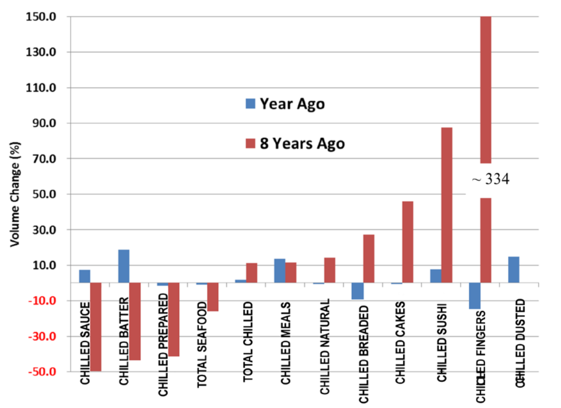
Over the long term (9yrs to 25th March 2017) chilled meals, natural, breaded, cakes, sushi and fingers have all been in growth; chilled fingers achieving a 334% increase in volume, albeit starting from a small base. Chilled sectors in decline over the same period included chilled prepared, sauce and batter.

Over the short term (52 wks. to 25th March 2017), it is the meals, sauce, sushi, dusted and batter segments that have been in volume growth. Dusted (a recently coded segment) continues to show strong volume and value growth, being perceived as a healthier and flavoursome alternative to breaded and battered. Chilled breaded and fingers were in volume decline.

Segment Share of Chilled 2017 (Value)



Long & Short Term Segment Volume Trends 2017



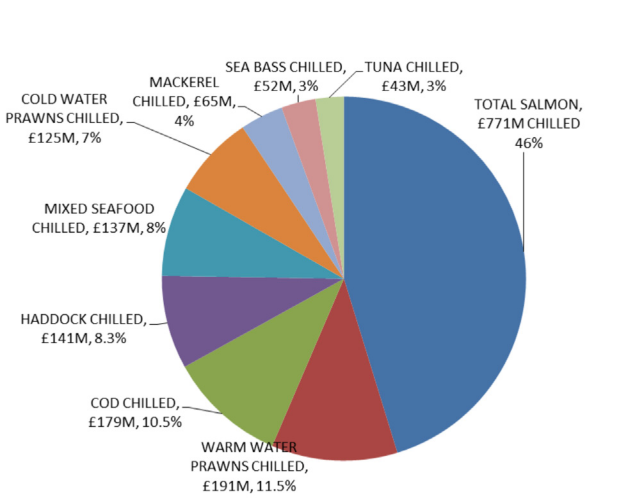
Chilled Seafood Segment Performance 2015 to 2017

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2015 52wks to 25.3.15	2016 52wks to 25.3.16	2017 52wks to 25.3.17	% Chg '16 vs '17	% Chg 2008 vs 2017 (9YA)	2015 52wks to 25.3.15	2016 52wks to 25.3.16	2017 52wks to 25.3.17	% Chg '16 vs '17	% Chg 2008 vs 2017 (9YA)	Avg Price 2017	Avg Price % Chg '16 vs '17	£ % Chg 2008 vs 2017 (9YA)
TOTAL SEAFOOD	3,112,077	3,116,959	3,138,797	0.7	16.3	330,897	329,523	327,004	-0.8	-15.8	£9.60	1.5	38.1
TOTAL CHILLED	1,938,399	1,980,236	2,022,941	2.2	32.0	148,385	151,168	153,893	1.8	11.1	£13.15	0.3	18.8
TOTAL FROZEN	693,241	688,361	694,838	0.9	-4.2	109,918	105,529	105,093	-0.4	-22.7	£6.61	1.4	24.0
TOTAL AMBIENT	480,437	448,361	421,018	-6.1	-4.4	72,593	72,826	68,019	-6.6	-40.1	£6.19	0.5	59.8
CHILLED NATURAL	1,148,859	1,168,253	1,179,716	1.0	42.6	68,903	71,704	71,325	-0.5	14.1	£16.54	1.5	25.0
CHILLED PREPARED	273,671	294,313	287,437	-2.3	-31.0	21,538	22,328	22,020	-1.4	-41.2	£13.05	-1.0	17.4
CHILLED MEALS	126,797	137,815	157,956	14.6	23.0	18,438	19,605	22,286	13.7	11.7	£7.09	0.8	10.2
CHILLED SAUCE	115,309	108,605	114,995	5.9	-12.2	10,545	9,500	10,212	7.5	-49.5	£11.26	-1.5	74.0
CHILLED CAKES	90,494	83,325	80,150	-3.8	38.4	11,363	10,799	10,722	-0.7	45.9	£7.48	-3.1	-5.0
CHILLED SUSHI	71,139	69,673	76,651	10.0	106.8	4,931	4,791	5,163	7.8	87.5	£14.85	2.1	10.4
CHILLED BREADED	79,677	73,759	74,488	1.0	58.7	9,708	8,396	7,623	-9.2	27.3	£9.77	11.2	24.6
CHILLED DUSTED	23,367	28,883	33,776	16.9	N/A	2,130	2,569	2,949	14.8	N/A	£11.45	1.9	N/A
CHILLED BATTER	7,493	11,728	14,122	20.4	-6.1	645	995	1,181	18.6	-43.4	£11.96	1.5	65.9
CHILLED FINGERS	1,592	3,881	3,651	-5.9	338.3	185	482	412	-14.5	333.7	£8.86	10.0	1.0

(Nielsen Scantrack 9yrs/52wks to 25.3.17)

Chilled Seafood Species

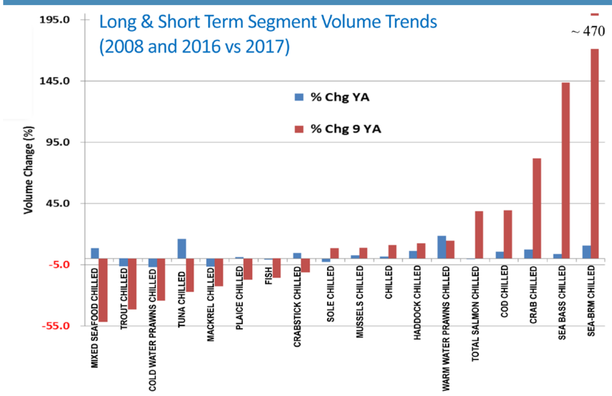
Salmon dominates the chilled seafood sector with a 46% value share of the top species, selling nearly four times its nearest competitor in both volume and value. Smoked salmon makes up 36% of total chilled salmon sales by value. Chilled warm water prawns recently displaced cod as the second most popular species with 11.5% value share, followed closely by cod (10.5%), haddock (8.3%) and mixed seafood (8.0%) displacing cold water prawns (7.3%).



The consumption of traditional whitefish species has been in steady decline since the 1980s, whilst salmon and other aquaculture seafood species have grown in popularity.

Chilled whitefish consumption fell -62% from 1980 to 2015, compared to chilled salmon up 293% (ref Defra family food).

Chilled salmon sales continued to grow through the recession despite being over 40% more expensive per kg than cod in March 2017. Lower prices and improved availability have driven cod consumption in recent years.



In the 52wks to 25th March 2017, chilled cod was worth £179m, with 14,798 tonnes. Since 2008, its volume and value increased by 40% and 23% respectively.

Over the long term (9yrs to 25th March 2017) the top four species, salmon, warm water prawns, cod and haddock were in full (volume and value) growth. Seabream, seabass and crab grew by over 100% from a small base. Over the same period, cold water prawns and mackerel were in volume decline, whilst mixed seafood, tuna and trout were in full decline. Price changes have influenced the majority of species trends since 2008, where significant price increases have impacted negatively on volume sales. The main exceptions to this are chilled salmon and warm water prawns where consumption has continued to increase despite double-digit price increases.

Most of the top 10 chilled species have experienced double digit inflation when compared to nine years ago, notably mixed seafood (+85%) and cold water prawns (+54%). Only cod, haddock and sole showed a decrease in average price.

In the short term, (52wks to 25th March 2017), most chilled species were in full growth, with the exception of cold water prawns, mackerel and trout.

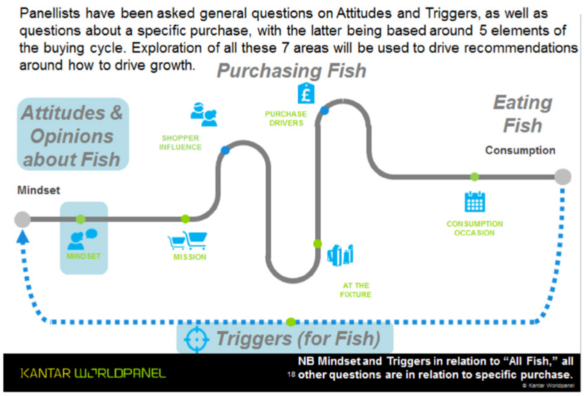
Chilled Species Performance 2015 to 2017

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2015 52wks to 25.3.15	2016 52wks to 25.3.16	2017 52wks to 25.3.17	% Chg '16 vs '17	% Chg 2008 vs 2017 (9YA)	2015 52wks to 25.3.15	2016 52wks to 25.3.16	2017 52wks to 25.3.17	% Chg '16 vs '17	% Chg 2008 vs 2017 (9YA)	Avg Price 2017	Avg Price % Chg '16 vs '17	£ % Chg 2008 vs 2017 (9YA)
TOTAL FISH	3,112,077	3,116,959	3,138,797	0.7	16.3	330,897	329,523	327,004	-0.8	-15.8	£9.60	1.5	38.1
TOTAL CHILLED	1,938,399	1,980,236	2,022,941	2.2	32.0	148,385	151,168	153,893	1.8	11.1	£13.15	0.3	18.8
TOTAL SALMON CHILLED	746,199	768,407	770,592	0.3	60.4	42,594	45,740	45,492	-0.5	38.7	£16.94	0.8	15.7
WARM WATER PRAWNS CHILLED	153,436	170,981	190,701	11.5	31.6	8,777	10,281	12,172	18.4	14.7	£15.67	-5.8	14.8
COD CHILLED	176,672	174,728	178,863	2.4	23.3	13,762	14,030	14,798	5.5	39.6	£12.09	-2.9	-11.7
HADDOCK CHILLED	133,551	135,372	141,339	4.4	6.4	11,026	11,210	11,910	6.2	12.3	£11.87	-1.7	-2.8
MIXED SEAFOOD CHILLED	119,234	123,731	136,572	10.4	-10.7	13,920	14,270	15,483	8.5	-51.7	£8.82	1.7	84.8
COLD WATER PRAWNS CHILLED	131,648	128,084	125,049	-2.4	1.5	10,915	9,662	8,977	-7.1	-34.2	£13.93	5.1	54.3
MACKEREL CHILLED	71,312	68,535	65,092	-5.0	0.4	9,033	8,826	8,236	-6.7	-22.5	£7.90	1.8	29.4
SEA BASS CHILLED	40,590	47,317	52,173	10.3	143.9	2,769	3,072	3,190	3.8	143.9	£16.36	6.2	0.0
TUNA CHILLED	38,972	39,728	42,600	7.2	-15.2	2,742	2,745	3,187	16.1	-27.2	£13.37	-7.6	16.6
TROUT CHILLED	34,329	34,617	33,804	-2.3	-22.8	3,095	3,093	2,900	-6.2	-41.5	£11.66	4.1	31.9
CRAB CHILLED	19,379	21,716	22,459	3.4	117.5	969	1,108	1,189	7.3	81.8	£18.89	-3.6	19.7
CRABSTICK CHILLED	23,396	21,276	22,110	3.9	21.4	4,653	4,323	4,519	4.5	-11.4	£4.89	-0.6	36.9
SOLE CHILLED	22,142	21,782	22,015	1.1	-9.7	1,764	1,752	1,706	-2.6	8.6	£12.90	3.8	-16.9
PLAICE CHILLED	19,492	21,913	21,295	-2.8	-16.3	1,814	1,982	2,010	1.4	-17.1	£10.59	-4.2	0.9
MUSSELS CHILLED	17,781	16,842	17,635	4.7	10.8	2,927	2,809	2,890	2.9	8.8	£6.10	1.8	1.8
SEA-BRM CHILLED	12,693	14,197	16,322	15.0	481.5	912	974	1,077	10.6	469.8	£15.16	4.0	2.1

(Nielsen Scantrack 9yrs/52wks to 25.3.17)

The Chilled Seafood Shopper

Seafish commissioned Kantar to carry out two studies to determine why, how, when and where people buy seafood (shopper journey and mission/channel). Combined with previous Seafish shopper research and the Institute of Grocery Distribution IGD benchmarking of the seafood shopper, the insight can then be used to guide new product development (NPD), marketing and sales strategy.



For seafood the shopper is usually also the consumer, although, there are some disconnects around seafood products aimed at children - for example, coated fish shapes.

One reason for the continued growth of chilled seafood despite its relatively high average price may be down to a strong shopper focus on value for money. Shoppers and consumers perceive chilled and frozen seafood very differently. Chilled seafood is seen as 'healthier', 'fresher', 'better tasting', 'higher quality' and 'easier to cook' than frozen; and is typically bought with a treat or special occasion in mind. Chilled seafood shoppers are generally more engaged and knowledgeable about seafood and surrounding issues such as sustainability. In comparison, frozen seafood is seen as a 'convenient', cupboard and shopping list staple.

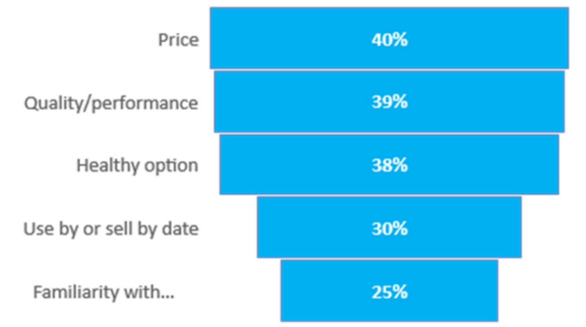
Top 5 Attributes Shoppers Use To Identify Higher Quality

Shoppers comment on 'mushy texture', loss of flavour and struggle with the concept of how frozen seafood can still be 'fresh' and dislike not being able to see the product through the packaging.

> Chilled meat and fish products labelled 'British' or 'locally produced' are being increasingly associated with better quality (54% Jun'16 vs 42% Jun'15). (IGD)

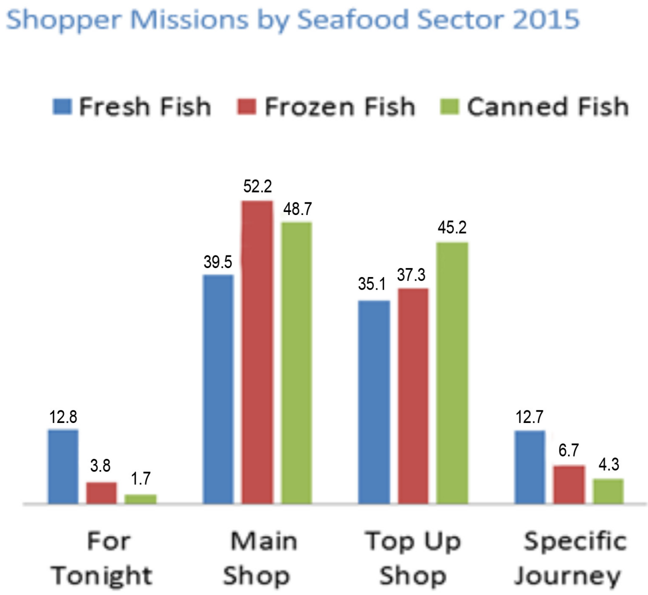
Nielsen demographics describe the chilled seafood shopper as more affluent than the average seafood buyer, but in all other respects they are very similar. Chilled seafood shoppers are predominantly, older (45-64) couples and singles, typically in two person households without children present. Where children are present they are typically aged 5-10 yrs.

Top 5 purchase drivers for Chilled Seafood (% of Shoppers that claim it is important)



IGD surveys suggest chilled seafood shopper as being unique compared to the typical seafood buyer in being predominantly male and more affluent. When living in a household with young children, the seafood is usually eaten by the shopper only. This unique profile of the chilled seafood shopper opens up a whole host of male targeted flavours, cross-site promotions and marketing opportunities.

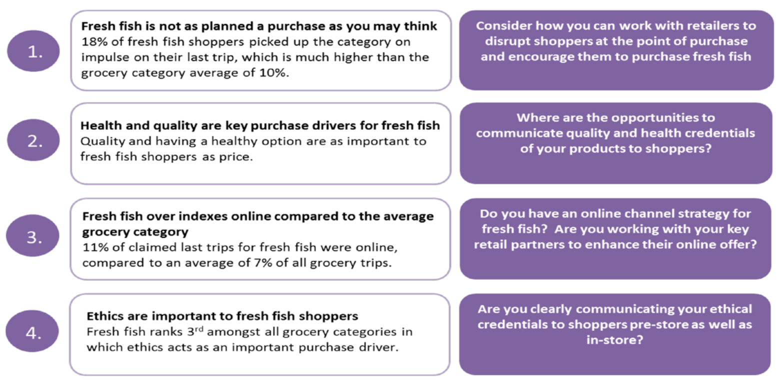
> Health and quality are almost as important to chilled fish shoppers as price with 64% of shoppers claiming it is worth paying extra for higher quality.



The Chilled Shopper Mission

The Shopper 'Mission' is simply the reason for the shopping trip. The 'main shop' is the key mission for chilled seafood shoppers (39.5%), followed by a top up shop (35.1%). Chilled seafood is most often bought on a pre-planned or impulse 'meal for tonight' mission, intended for immediate consumption or later that same day. This pattern occurs less with other proteins. For the chilled seafood shopper, the decision to buy is more likely to be influenced in store, often with a specific meal in mind and the seafood purchase is likely to influence the other ingredients; offering opportunities for instore shopper marketing, promotions and fixture (point of sale).

Key IGD Chilled Fish Insight and Opportunities

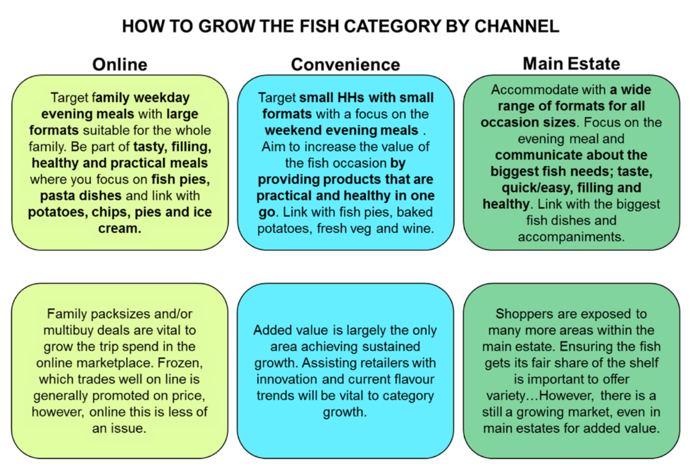


Chilled Seafood Channels

Supermarkets (main estate) are the primary channel for chilled seafood. Around 80% of shoppers use main estate to buy chilled seafood, followed by larger format stores (hypermarkets) then discounters and convenience stores. But, the main estate channel is in decline, with shoppers turning to convenience and online in recent years. The challenge is to grow seafood in these strongly performing channels.

Online used to be more attractive to frozen and ambient seafood shoppers, but over a five year period online has seen positive growth across all chilled seafood channels. Chilled natural seafood performed the strongest growing online sales by over £16m in the five years to May 2015.

The growing convenience channel offers the greatest potential for chilled seafood. Successful products should focus on quality, taste, health and convenience; utilising smaller formats and trending flavours. Cross-linked promotions would target wine and healthy accompaniments including fresh vegetables.



Chilled Seafood Growth in Online (Value change £'000 5Yrs to 2016 - Kantar)

Purchase

The shopper view of the chilled seafood fixture is generally positive. Shoppers favour fixtures that are easy to navigate, where products are attractively presented and easy to find and pricing is EDLP (Everyday Low Pricing). If a specific chilled seafood is not available, shoppers may be tempted to buy another chilled option, but are less likely to accept either frozen or ambient as a substitute: hence ensuring stock on shelf is important to retain the sale.

> The key to successful seafood products in online is meeting the need for larger format, tasty, filling and healthy mid-week evening meal solutions.

General purchase drivers favour products that are easy to cook, with chilled seafood shoppers specifically looking for attractive packaging and product, alongside packs of a convenient size. The trend for polarisation in household size towards single households and larger households could be used to steer pack size strategy.

Seafood shoppers want more recipe inspiration, but report being intimidated by asking an instore fishmonger. The percentage of pre-packaged seafood has grown strongly in recent years. In 2017, 93% of seafood was sold in prepack, rather than from the counter.

The chilled shopper has a strong desire for more inspiration, is more open to trying new species and is more receptive to messaging around provenance and responsible sourcing. Key barriers to purchase at fixture (point of sale) are smell and presentation of fish with eyes and heads. Therefore retailers should ensure the fish has sufficient freshness quality to prevent unpleasant odours. Shoppers are unsure on portion size and how to choose fish with adequate freshness quality; in addition they are put off trying new species due to the fear of wastage. Chilled seafood shoppers are much more open to browsing the category compared to chilled meat shoppers (IGD); opening up significant opportunity to educate the shopper and brighten the seafood shopping experience. This could take the form of guides or an interactive fixture; or cross siting to bring together key recipe ingredients into one place to make it easier for the shopper.

Recently, the grocery landscape has been shifting to a position of simplicity; the number of stock keeping units (SKUs) at fixture being pared down to the core lines that perform well; and the complexity of the multitude of different types of promotions are being cut and simplified in favour of total price reduction (TPR). In 2015 the dominant chilled fish promotional mechanic was strongly Y for £x with TPR promotions at only around 23% by volume. Better performing promotions for chilled fish may be the meal deals and cross-linked promotions with key ingredients.

Eating

Chilled seafood is typically eaten by adults at a dinner/tea occasion, although lunch features more for chilled seafood than other formats. Chilled seafood shoppers are split in that some find it hard to cook well, whilst others find it easy to cook. Many are put off by handling and preparing the seafood, uncertainty over cooking time and perceived safety issues. Again the greatest barriers are unpleasant smell and overly fishy flavours, which are both indicators of low freshness quality. Another big turn off for shoppers is the fear of bones. When it comes to accompaniments, chilled seafood is most likely to be eaten with salad. Key flavour trends filtering down from foodservice remain as American/ South American (especially Mexican) and Far Eastern. Key flavours are lemon, garlic and chilli. Growing formats are smoked, sushi and ‘poke’ a Hawaiian raw fish salad ‘superfood’.

THE DETAIL; CHILLED SHOPPER JOURNEY SUMMARY & RECOMMENDATIONS

	NATURAL	ADDED VALUE	SMOKED	PRAWNS	BREADED
MINDSET	Most engaged/devoted of all, sustainability & quality key, look to stretch species knowledge & experimenting.	See less benefit, less key in diet and on list less so must do more to push idea of fish as favourite vs other protein.	Average engagement but price driven, less likely to be on list and less of a favourite so image requires work.	Less engaged via key drivers – need to positon more as key in diet, beneficial and as favourite.	On the list but score poorly, see it as harder to cook and lack confidence, see frozen as fresh; need education.
MISSION	Need to target larger missions around specific and immediate meal ideas so new recipes perhaps key.	Less specific meal driven so likely on quick trips and impulse – will require more in store focus as a result.	Need to target larger missions, specific meal and stocking up – i.e. push idea as replenish/list essential.	Target larger missions and consumption ideas around specific meals and immediate consumption.	Large mission and stocking orientated so target idea of replenishment / fridge filler more specifically.
INFLUENCE	Specific product and meal known in advance of shop so target shoppers in the home with fish as key focus.	Decision to buy much more likely in store and at fixture so stand out and messaging will be required here.	Product and meal likely to be known prior to going to store so in home target around meal ideas.	Must speak to shoppers in the home as have decided on meal and product in advance of getting to shop.	In store decisions on product likely with loose meal concept – message in store on versatility
AT FIXTURE	May consider other chilled so stretch repertoire around meal ideas on pack/fixture. Overall experience is good.	Visibility and ease of find not as strong, so perhaps need for clearer signposting in store.	One track mind – wont consider anything and easy to find what wanted pushing need to target in advance.	Less of a positive experience around pricing and product visibility & labelling so could review?	Will be considering other things, so need for in store guidance and education to help make decisions.
DRIVERS	Focus on meal orientated drivers; ease of cook, size, presentation – dial these up around meal ideas.	Clear drivers to focus on and dial up – ease of cook, right size and scope to offer something new.	Value and specificity are key drivers, so focus would need to be around extended use around concept of value.	Core driver is product specificity so product must clearly be sole focus on targeting messaging.	Tie drivers into versatility and stocking message – ease of cook, value for money and correct size.
CONSUMPTION	Target adult orientated evening meals based around veg, rice, pasta and home made sauces.	Some issues to address around eating experience; enjoyment , satisfaction and health in particular.	Value could be pushed around multi occasion use (not just dinner) and also address flavour/smell issue.	Dial up positive eating experience esp. flavour & health with ideas including rice, pasta, sauce & "dishes"	Targeting around suitable for all as kids eat too, and need to address flavour and health concerns
TRIGGERS	Price & freshness key triggers; possible repertoire expansion via knowledge on other fish at better price?	Stated triggers echo previous findings; focus on wider range, inspiration, quick prep and size clarity.	Desire for guidance on species & inspiration feeds directly into and can support above targeting process.	Desire for more ideas on quick prep and information / inspiration further support proposed targeting.	Price a key trigger so tap into this via versatility, with wider need for more knowledge / info generally.
10% +1 PURCHASE	£7.2M	£5.4M	£4.7M	£2.5M	£2.7M

SEAFISH

Data:

- Retail data: AC Nielsen Scantrack/Homescan: 52 weeks to March 25th 2017 (Scantrack excludes discounters and seafood sandwiches) (%) values represent change from the previous year unless otherwise stated
- Kantar World Panel Seafood Shopper Journey Report 2015
- Kantar World Panel Seafood Channel Report 2016
- Defra Family Food Survey 2015
- IGD 2016 Category Benchmarks
- IGD Quality in Focus 2016 Update

More Information:

For the full range of market insight factsheets, covering different sectors of the seafood industry go to the Seafish website - http://www.seafish.org/research-economics/market-insight/market-insight-factsheets

Information and insight is available free of charge for levy paying seafood businesses. Click here to subscribe for the monthly market e-alert, and secure report access

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