

# Fish and Shellfish: Inc Impact of COVID-19 - UK - August 2020

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## This report looks at the following areas:

- The impact of COVID-19 on the fish and shellfish market
- The buying factors that would win over shoppers to new products
- How shoppers expect to change their buying behaviours as incomes are squeezed
- Key new product trends and opportunities in 2020

Fish/shellfish guaranteed to be sourced from unpolluted waters appeal to 74% of people who eat and buy the category, providing stark evidence of the reach of the media coverage around ocean plastic in recent years.

The lockdown to combat the spread of COVID-19 helped boost the sales of frozen and ambient as people sought out long-life products. Fish/shellfish's relatively high price means cutbacks are on the cards as incomes come under pressure during the recession triggered by the outbreak. Trading down within the category is also anticipated, including from chilled to frozen or tinned products. Heightened health and environmental concerns are, however, expected see people reduce their meat intake, creating opportunities for fish/shellfish.

A third of buyers would buy less fish/shellfish if they had less money to spend on groceries, underlining the potential for the coming recession to have a significant impact on volume sales. Meanwhile 38% of buyers would wait to buy on promotion, dialling up the pressure on margins. Consumer openness to alternative species to familiar favourites could offer a means for operators to meet the demand for accessible prices.

A renewed focus on health among consumers has emerged as a result of the COVID-19 pandemic. The fish/shellfish category is in a good position to benefit from this, but has yet to realise its full potential. For example, flagging up certain species' status as a source of selenium and zinc and the related



"The lockdown helped boost the sales of frozen and ambient as people sought out long-life products. As incomes come under pressure, fish/shellfish's relatively high price means cutbacks are on the cards.

The segment's healthy image should see it benefit from the increased health focus in the wake of the pandemic, including meat reduction."

– Alice Baker, Research Analyst

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immune health claims would be timely, such claims appearing on just 1% of category launches in 2019.

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## Table of Contents

### OVERVIEW

- Key issues covered in this Report
- COVID-19: Market context
- Economic and other assumptions
- Products covered in this Report

### EXECUTIVE SUMMARY

- Impact of COVID-19 on fish and shellfish

Figure 1: Short, medium and long-term impact of COVID-19 on fish and shellfish, 30 August 2020

- The market
- Inflation masks volatile volume sales performance over 2015-20
- Further inflation and volatile volume sales anticipated for 2020-25

Figure 2: UK retail value sales of fish and shellfish, 2015-25

- Ambient and frozen fish are main beneficiaries from COVID-19 lockdown

Figure 3: UK retail value sales of fish and shellfish, by format, 2015-20

- Calls to action on marine conservation and sustainability
- UK's trade relations post-Brexit are crucial for the category
- Companies and brands
- Own-label dominates sales in the chilled fish segment
- Own-label wins in frozen among rising inflation and uncertainty

Figure 4: Leading brands' sales and share in the UK frozen fish and shellfish market, by value, 2018/19 and 2019/20

- Own-label grows value share in ambient to 50%

Figure 5: Leading brands' sales and share in the UK ambient fish and shellfish market, by value, 2018/19 and 2019/20

- Sustainable claims are widespread in fish/shellfish
- High protein is the most widespread health claim, but still only 14%
- Leading brands push meal occasions and quality in their marketing
- Brands respond to COVID-19 online
- The consumer
- Nine in 10 adults eat fish or shellfish

Figure 6: Usage of fish and shellfish, by type, June 2020

- Over half of people stick to only a few fish types
- Familiarity chimes for trying new products

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Figure 7: Prompts to try a new fish/shellfish product, June 2020

- **Ease of cooking and low price rate highly in product choice**

Figure 8: Factors influencing choice of fish and shellfish, June 2020

- **New species suggestions appeal to seven in 10 users/buyers**

Figure 9: Fish and shellfish eating and buying behaviours, June 2020

- **29% have eaten plant-based fish alternatives**

Figure 10: Fish and shellfish non-users' behaviours, June 2020

- **A third of buyers would buy less fish/shellfish if they had less money**

Figure 11: Expected reactions to the recession, June 2020

- **Opportunities for fish/shellfish to benefit from the meat reduction trend**

Figure 12: Attitudes towards fish and shellfish, June 2020

#### COVID-19 AND FISH AND SHELLFISH

- **Impact on the market**
- **Lockdowns cause price fluctuations and boost sales of frozen and ambient**
- **Fish and shellfish is set to lose out during the recession**
- **Impact on consumers**
- **Scratch cooking trend offers opportunities for the category...**
- **...as does consumers' renewed health focus**
- **Greater urgency to prove commitment to sustainability**
- **Impact on companies and brands**
- **Own-label reaps the benefits of the growth in frozen and ambient**
- **Brands offer advice to consumers during the lockdown**
- **Growth in online retail opens up opportunities for more direct-to-consumer sales**

#### ISSUES AND INSIGHTS

- **Highlight fish's functional benefits to harness consumers' heightened health-consciousness in the wake of the COVID-19 pandemic**
- **Promote lesser-known species as a financially savvy and ethical choice**
- **Offer meal ideas to encourage more frequent usage**

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**THE MARKET – KEY TAKEAWAYS**

- **Inflation masks volatile volume sales performance over 2015-20**
- **Further inflation and volatile volume sales anticipated for 2020-25**
- **Ambient and frozen fish are main beneficiaries from COVID-19 lockdown**
- **Calls to action on marine conservation and sustainability**
- **UK’s trade relations post-Brexit are crucial for the category**

**MARKET SIZE AND FORECAST**

- **Impact of COVID-19 on fish and shellfish**  
Figure 13: Short, medium and long-term impact of COVID-19 on fish and shellfish, 30 August 2020
- **Inflation masks volatile volume sales performance over 2015-20**
- **Rise in value and volume sales in 2020**  
Figure 14: UK retail value and volume sales for fish and shellfish, 2015-25 (prepared on 27th August 2020)
- **Further inflation and volume sales volatility expected for 2020-25**
- **Brexit to drive inflation in the category**
- **Volume sales to fall during recession...**
- **...but consumer health trend should offer some, though diminishing support**  
Figure 15: UK retail value sales of fish and shellfish, 2015-25  
Figure 16: UK retail volume sales of fish and shellfish, 2015-25
- **Market drivers and assumptions**  
Figure 17: Key drivers affecting Mintel’s market forecast, 2015-25 (prepared on 27th August 2020)
- **Learnings from the last recession**  
Figure 18: UK retail sales of fish and shellfish, by value and volume, 2005-10
- **Forecast methodology**

**MARKET SEGMENTATION**

- **Falling prices prompt a modest rise in chilled fish volume sales in 2020**  
Figure 19: Value and volume sales of chilled fish and shellfish, 2015-20
- **Frozen products benefit from the national lockdown**  
Figure 20: Value and volume sales of frozen fish and shellfish, 2015-20
- **Ambient products see a renaissance in 2020**

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- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
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Figure 21: Value and volume sales of ambient fish and shellfish, 2015-20

**MARKET DRIVERS**

- **Fish prices prove volatile over 2018-20**
- **Environmental issues impact the category**
- **Parliamentary committee urges the government to take action on marine conservation**
- **WWF criticises EU for 'missing deadline' on sustainability targets**
- **Concerns grow as stocks of popular fish species fall**
- **Supermarkets slammed over fish farming's impact on marine ecosystems**
- **UK's trade relations post-Brexit are crucial for the category**
- **Decline in the child population will hinder the category**

Figure 22: Weekly or more frequent usage of fish, by type, by parents and non-parents, June 2020

Figure 23: Weekly or more frequent usage of shellfish, by type, by parents and non-parents, June 2020

**COMPANIES AND BRANDS – KEY TAKEAWAYS**

- **Own-label dominates sales in the chilled fish segment**
- **Own-label wins in frozen among rising inflation and uncertainty**
- **Own-label grows value share in ambient to 50%**
- **Sustainable claims are widespread in fish/shellfish**
- **High protein is the most widespread health claim, but still only 14%**
- **Leading brands push meal occasions and quality in their marketing**
- **Brands respond to COVID-19 online**

**MARKET SHARE**

- **Own-label dominates sales in the chilled fish segment**
- **Own-label reaps the benefits of frozen fish's 2020 sales boom**

Figure 24: Leading brands' sales and share in the UK frozen fish and shellfish market, by value and volume, 2017/18-2019/20

Figure 25: Leading brand owners' sales and share in the UK frozen fish and shellfish market, by value and volume, 2017/18-2019/20

- **Own-label is the chief beneficiary of ambient fish's 2020 renaissance**

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- Full Report PDF
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Figure 26: Leading brands’ sales and share in the UK ambient fish and shellfish market, by value and volume, 2017/18–2019/20

Figure 27: Leading brand owners’ sales and share in the UK ambient fish and shellfish market, by value and volume, 2017/18–2019/20

**LAUNCH ACTIVITY AND INNOVATION**

- Sustainable claims are widespread in fish/shellfish**  
 Figure 28: Share of new product launches in the UK fish and shellfish market with ethical and environmental claims, 2016–20 (sorted by 2019)
- Fish Said Fred claims UK first with ASC-certified sea bass and bream**  
 Figure 29: Example of the Fish Said Fred range, 2020
- Brands and retailers look to make their environmental credentials more tangible**  
 Figure 30: Examples of fish/shellfish launches giving on-pack details of their environmental policies, 2019–20
- Putting the spotlight on lesser-known species**  
 Figure 31: Iceland’s What the Fish? range gives the limelight to lesser-known fish species, 2018
- Brands and retailers take action on plastic**
- Princes replaces plastic with cardboard on its tuna multipacks**
- Lidl introduces new packaging made partly from salvaged ocean plastic**
- Waitrose explores packaging made from langoustine shells**
- Waitrose claims UK first by selling British shellfish originally destined for restaurants**
- High protein is the most widespread health claim, but still only 14%**  
 Figure 32: Share of new product launches in the UK fish and shellfish market with health claims, 2016–20 (sorted by 2019)
- Brands and retailers emphasise the health credentials of fish-in-sauce products**  
 Figure 33: Examples of fish-in-sauce/marinade launches with high-protein claims, 2020
- Young’s puts the focus on permissibility with reduced fat battered product**  
 Figure 34: Young’s launches reduced fat battered fish product, 2020

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- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
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- **Functional health claims are underexplored in the fish/shellfish category**
- **Highlight selenium in fish to tap into increased consumer interest in immune health**  
Figure 35: The Big Prawn Company's lobster makes immune health claim, 2019
- **Put a stronger emphasis on oily fish's links with brain and eye health**  
Figure 36: Waitrose & Partners Scrumptious Summer Thai Salmon Burgers making functional health claims relating to omega-3, 2020
- **Modest rise in premium claims in 2019**  
Figure 37: Share of new product launches in the UK fish and shellfish market with a premium claim, 2016-20
- **Brands and retailers explore alternatives to standard breadcrumbs**  
Figure 38: Examples of coated fish/shellfish products using alternatives to standard breadcrumbs, 2019-20
- **Opportunities for link-ups with craft brands on beer-battered fish**
- **M&S launches what it terms its 'best ever' fish cake**  
Figure 39: Examples of premium own-label fish launches, 2020
- **Smoked mackerel launch pushes seasonality**  
Figure 40: Smoked mackerel launch references seasonality, 2020
- **Private label leads on launch activity**  
Figure 41: New product launches in the UK fish and shellfish market, by private label and branded, 2016-20
- **Spar launches its own chilled fish range**
- **New formats offer potential competition for processed meat products**  
Figure 42: Examples of own-label fish products in formats normally seen in the processed meat category, 2020
- **Exploring international flavours**  
Figure 43: Examples of fish/shellfish launches with international flavours, 2019-20
- **Brands look to attract new users**
- **Young's redesigns its packaging to appeal to foodies... and launches new product designed to appeal to teenagers**  
Figure 44: Young's looks to appeal to teenagers with fish 'quarter pounders', 2020

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- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

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- **Princes launches new products intended to ‘meet the needs of modern family life’**

Figure 45: New product launches from Princes, 2019

- **John West launches its first children’s product**
- **Young’s extends its chilled fish offering**
- **Birds Eye launches extra-large fish fingers**
- **Brands and retailers release fish substitute products**

Figure 46: Examples of fish substitutes launches, 2019

- **Ambient fish alternatives gain supermarket listings**

**ADVERTISING AND MARKETING ACTIVITY**

- **Retailers lead on advertising in 2019**

Figure 47: Total above-the-line, online display and direct mail advertising expenditure on fish and shellfish, 2019 and 2020

- **Birds Eye is the biggest individual spender in 2019**
- **TV adverts highlight products’ wholesome credentials**
- **‘Follow the Fish’ initiative marks MSC certification**
- **Website offers suggestions on how to keep children entertained during the lockdown**

Figure 48: Banner headline for section of Birds Eye website giving advice on activities for children, 2020

- **Making fish finger sandwiches promoted as a ‘fun and filling lunchtime activity’**

Figure 49: Instagram post from Birds Eye promoting its fish finger sandwich recipes, 2020

- **Interactive campaign pushes the money-saving aspects of frozen food**

Figure 50: Facebook post from Birds Eye promoting the winner of its ‘Frozen Food Heroes’ competition, 2020

- **Princes focuses on meal occasions and promotes its ethical credentials**
- **Mackerel Sizzle presented as a convenient and healthy evening meal option**

- **Recipe suggestions promoted as allowing people to ‘make the most of what you have’**

Figure 51: Instagram post by Princes, 23 March 2020

- **Charity link-ups during the pandemic should have generated consumer goodwill**
- **Packaging redesign portrayed as helping to preserve environment for future generations**
- **Young’s 2020 campaign pushes fish’s versatility**

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- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
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- **TV advert highlights brand’s heritage and encourages people to ‘master mealtimes’**  
Figure 52: Young’s ‘Masters of Fish’ TV advert, 2020
- **‘Young’s Kitchen’ campaign offers recipes and tips**
- **Selected supermarket campaigns**
- **Asda positions fish as helping people to make a healthy start to the New Year...**
- **...and praises frozen fish as a good value and ethical option**
- **Lidl promotes its use of salvaged ocean plastic in packaging**  
Figure 53: Lidl press advert promoting its use of salvaged ocean plastic in packaging for its chilled fish range, 2020
- **Nielsen Ad Intel coverage**

**THE CONSUMER – KEY TAKEAWAYS**

- **Nine in 10 adults eat fish or shellfish**
- **Over half of people stick to only a few fish types**
- **Ease of cooking appeals widely**
- **New species suggestions interest two in three**
- **29% of fish/shellfish non-users have eaten plant-based fish alternatives**
- **A third of buyers would buy less fish/shellfish if they had less money**
- **Opportunities for fish/shellfish to benefit from the meat reduction trend**
- **Sourcing from unpolluted waters chimes widely**

**IMPACT OF COVID-19 ON CONSUMER BEHAVIOURS**

- **Offer recipe suggestions to capitalise on the growth in scratch cooking**
- **Lockdown sees uplift in scratch cooking**  
Figure 54: Changes to cooking from scratch since the start of the COVID-19 outbreak, by age and gender, 23 April-7 May 2020
- **Fish and shellfish can capitalise on the cooking trend**
- **Tinned products have the chance to shine**
- **Strong interest in tinned food from parents, recession should boost appeal**  
Figure 55: Those expressing an increased interest in a greater variety of tinned food since the COVID-19/coronavirus outbreak, by age of children in the household, May 2020
- **Increased consumer health focus provides opportunities for the category**

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- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
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- A stronger focus on fish/shellfish’s immune health benefits is needed**

Figure 56: Those saying they had become more interested in foods that support the immune system, by age of children in the household, May 2020

- Growth in online retail opens up opportunities for more direct-to-consumer sales**
- Increased interest in buying local boosts fishmongers**
- Consumers’ renewed environmental focus poses a challenge and an opportunity**
- Plant-based fish alternatives have the chance to grow**

Figure 57: Agreement that the COVID-19/coronavirus outbreak has made a vegan diet more appealing, by age, 23 April -7 May 2020

**USAGE OF FISH AND SHELLFISH**

- Nine in 10 adults eat fish or shellfish**

Figure 58: Usage of fish and shellfish, by type, June 2020

- Over-55s are higher users of fish and shellfish...**
- ...but parents of under-16s are the most frequent users**

Figure 59: Weekly or more frequent usage of fish, by type, by parents and non-parents, June 2020

Figure 60: Weekly or more frequent usage of shellfish, by type, by parents and non-parents, June 2020

- Frozen formats lead for fish, while frozen and ambient are neck-and-neck for shellfish**

Figure 61: Usage of fish and shellfish, by format, June 2020

- Consumers’ financial health is crucial to the category**

Figure 62: Usage of fish, by type, by those with ‘healthy’ vs those with ‘tight’ finances, June 2020

Figure 63: Usage of shellfish, by type, by those with ‘healthy’ vs those with ‘tight’ finances, June 2020

**USAGE FREQUENCY FOR FISH AND SHELLFISH**

- Most adults eat fish and shellfish only occasionally**

Figure 64: Usage frequency for fish, by format, June 2020

Figure 65: Usage frequency for shellfish, by format, June 2020

- Many people use different formats and types to get their two portions a week**
- Recipe suggestions should help to encourage more frequent usage of shellfish**

**BUYING FACTORS FOR FISH AND SHELLFISH**

- Over half of people stick to only a few fish types**

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Powerpoint Presentation

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Figure 66: Fish/shellfish buying habits, June 2020

- **People with tight finances are more likely to buy a wide range of different types**
- **Many people are open to trying new products**

Figure 67: Prompts to try a new fish/shellfish product, June 2020

- **Similarity to their favourite fish/shellfish types sways four in 10**
- **Supporting British fisheries is particularly important to over-55s**
- **Combine ‘support British fisheries’ and sustainable claims to strengthen ethical image**
- **Ease of cooking is valued by many**

Figure 68: Factors influencing choice of fish and shellfish, June 2020

- **Highlight ease and speed more prominently on-pack**
- **Scope for expansion in cook-in-the-bag formats**
- **Recipe suggestions would help companies to tap into the rise in home cooking**
- **Price is a key buying factor for fish/shellfish**
- **Sustainability concerns underpin some consumers’ wide repertoires**

Figure 69: Waitrose & Partners Easy to Cook Scottish Salmon emphasising ease and speed on-pack, 2020

Figure 70: International examples of whole fish products promoted as a convenient option, 2019

**FISH AND SHELLFISH EATING AND BUYING BEHAVIOURS**

- **New species suggestions appeal to seven in 10 users/buyers**
- **Use online channels to promote different species**
- **Highlight the ethical aspects of choosing alternatives to popular species**
- **Half of buyers check for sustainability labels on-pack**
- **Need to make sustainability claims more tangible**
- **UK and European companies look to demonstrate their environmental commitments**

Figure 72: International examples of shellfish products with on-pack environmental statements, 2019-20

- **48% of users try to eat two portions of fish/shellfish a week**
- **Need to educate consumers on the importance on fish/shellfish’s health benefits**

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- Powerpoint Presentation
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### NON-USERS' BEHAVIOURS

- **29% have eaten plant-based fish alternatives**  
Figure 73: Fish and shellfish non-users' behaviours, June 2020
- **Promote the environmental benefits of fish alternatives to boost usage**
- **Develop more fortified products to strengthen fish alternatives' health image**

### EXPECTED REACTIONS TO THE RECESSION

- **A third of buyers would buy less, while 38% would wait for promotions**  
Figure 74: Expected reactions to the recession, June 2020
- **Frozen products set to get more of a sales boost than canned**
- **A quarter of people who would buy frozen more would also buy canned more**
- **Need to promote tinned fish as a good value option that also delivers quality and taste**
- **A stronger focus on provenance would help to build quality image**

### ATTITUDES TOWARDS FISH AND SHELLFISH

- **Fish or shellfish sourced from unpolluted waters appeal to many**  
Figure 75: Attitudes towards fish and shellfish, June 2020
- **Supplement sustainable sourcing claims with clean water claims**
- **Producers of farmed fish must underline their care for their fish and the environment**
- **Opportunities for fish/shellfish to benefit from the meat reduction trend**
- **Over-55s are especially likely to see fish as a healthy alternative to meat**
- **Direct comparisons with meat should help to strengthen fish's health image**
- **47% of users see fish/shellfish as an environmentally friendly alternative to meat**
- **Sauces are valuable in boosting fish/shellfish's appeal**
- **Opportunities for cross-promotions**
- **Need to reassure consumers of frozen fish/shellfish's quality**  
Figure 76: Examples of premium own-label frozen fish/shellfish products with a clear window on-pack showing the contents, 2020

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- **Opportunities for breaded/battered products with a clean-label focus**

Figure 77: International examples of frozen breaded/battered fish products highlighting their simple ingredients, 2019-20

- **Explain the reasons for use of additional ingredients**

**APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION**

- **Abbreviations**
- **Consumer research methodology**

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