



The Fish Finger Journey

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MAKING SEAFOOD
MORE RELEVANT TO
MORE PEOPLE

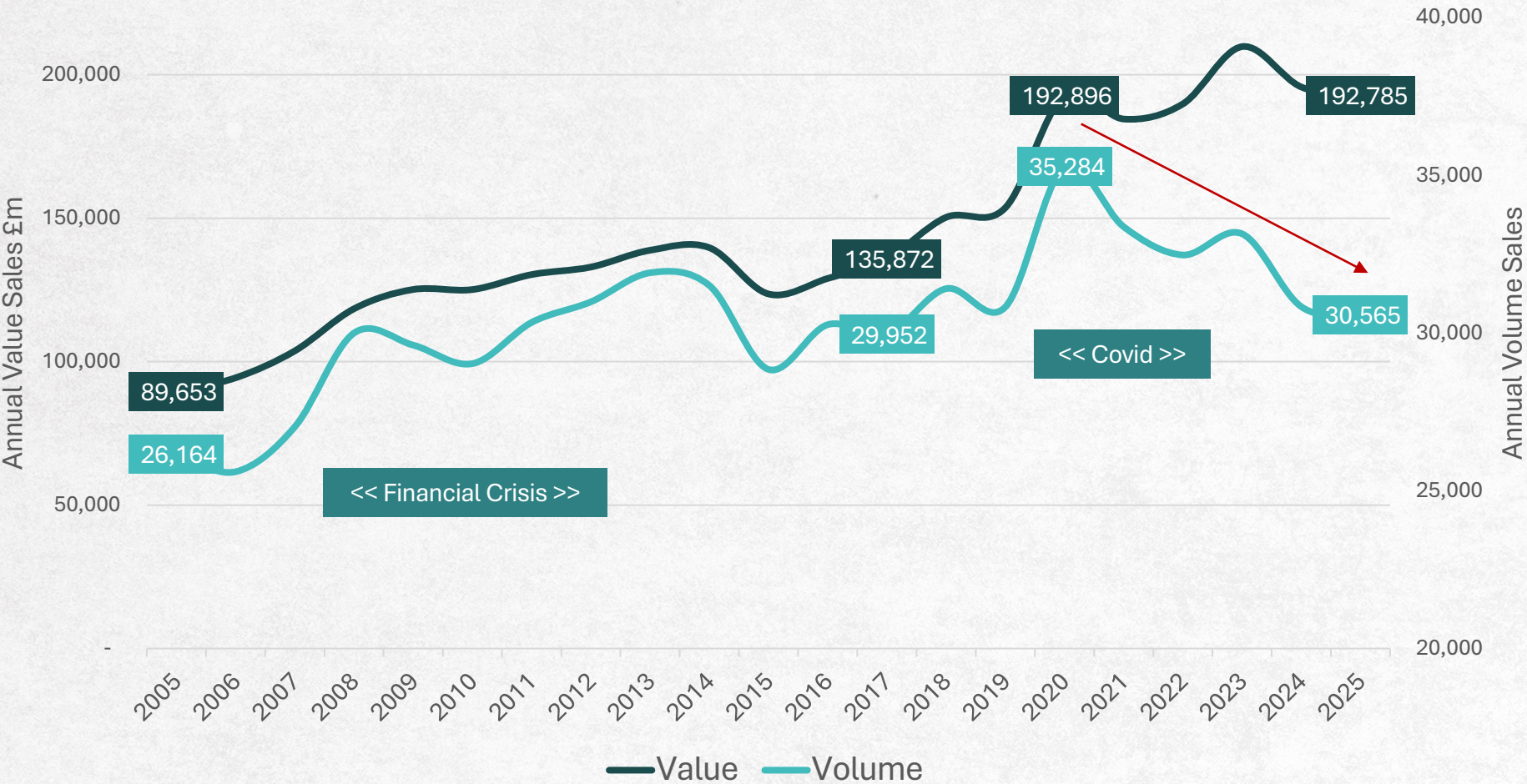




- We have an amazing protein that most people want to eat more of
 - A seafood shopper is the one of the most valuable shoppers there is
 - However, seafood consumption has not grown over the last 20 years
1. Regain & Retain our core older shoppers
 2. Drive conversion with babies, children and Gen Zs
 3. Expand repertoires by making seafood more relevant to more people



Whilst **Fish Fingers** have more than doubled in value over the last 20yrs, they have become ‘less relevant’ since the ‘Covid’ peak



	20yr CAGR	5yr CAGR
Value	+4.1%	-0.0%
Volume	+0.8%	-4.2%



23%

Volume share of
Frozen Seafood



14.3m

Households bought Fish
Fingers in the last year



26%

Occasions happen at
Lunch



4.5x

Households buy Fish
Fingers every 3mths





27%

of all Fish Finger occasions
are Under 16s...



...but almost **1 in 3** of their seafood
occasions are a Fish Finger!!

And it is not **just** about the kids...



52%

of all occasions **do not**
feature any Children



Which is why Fish Fingers can set you on a path to a lifetime of seafood consumption



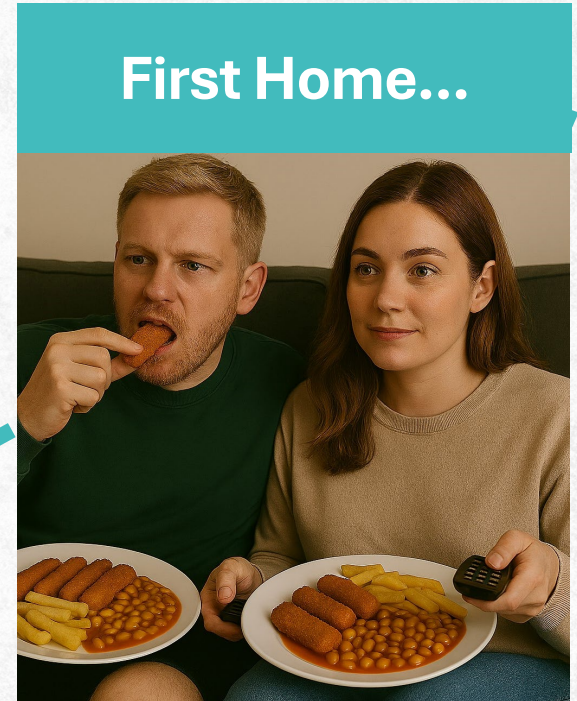
First Bites...



At School...



For Sports...



First Home...

And fish finger dishes continue to be some of the **nations favourites**



COATED FISH &
CHIPS
608m



FISH FINGERS &
CHIPS
200m



NATURAL FISH,
POTATO & VEG
165m



SALMON,
POTATO & VEG
98m



FISHCAKE
& CHIPS
61m



FISH FINGER
SANDWICH
56m



PRAWNS
ORIENTAL DISH
36m



SMOKED SALMON
SANDWICH
32m



PRAWNS
ITALIAN DISH
28m



PRAWNS
WITH SALAD
24m



PRAWNS
INDIAN DISH
12m



SALMON
ITALIAN DISH
12m



There is still a real **emotional connection** to a Fish Finger sandwich...



“4 fish fingers in-between two buttered slices of bread and red sauce. **Mmmmmm!**”

“Sometimes only a fish finger sandwich will hit the spot!”

“Has to be a fish finger sandwich!”



“Fish finger sandwich. Full of nostalgia from growing up”

“In a ciabatta sandwich with some tartare sauce, chips on the side and maybe some peas on the side too. Might use some lemon if I’m feeling fancy”



But we are currently facing into two main issues

Becoming less relevant?



49.5%

Household penetration
has dropped to its
lowest level since 2008



1 in 5

Younger households only
buy fish fingers in frozen

**Uninspired to
go further?**



Fish Fingers have a significant role to play in driving new consumers into seafood...

Accessible

Convenient

Nutritious

Healthy

Affordable

But we need to ensure that it is a ‘gateway into the rest of the category’



Thank you.



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