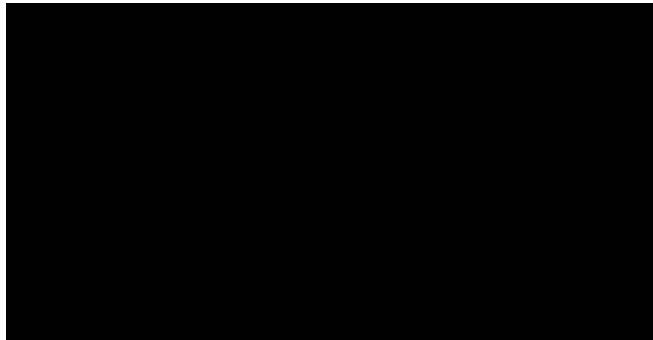




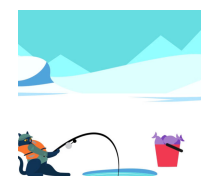
ICELANDIC

SEACHILL

More People # More Fish # More Often



SEACHILL



ICELANDIC
SEACHILL

The Plan - 2007

More Fish

Best-in-Class operations



People, Culture

Supply Chain

Our Vision & Strategy -2017

More People, More Fish, More Often

Market driven



Best-in-Class operations



Supply Chain Expertise

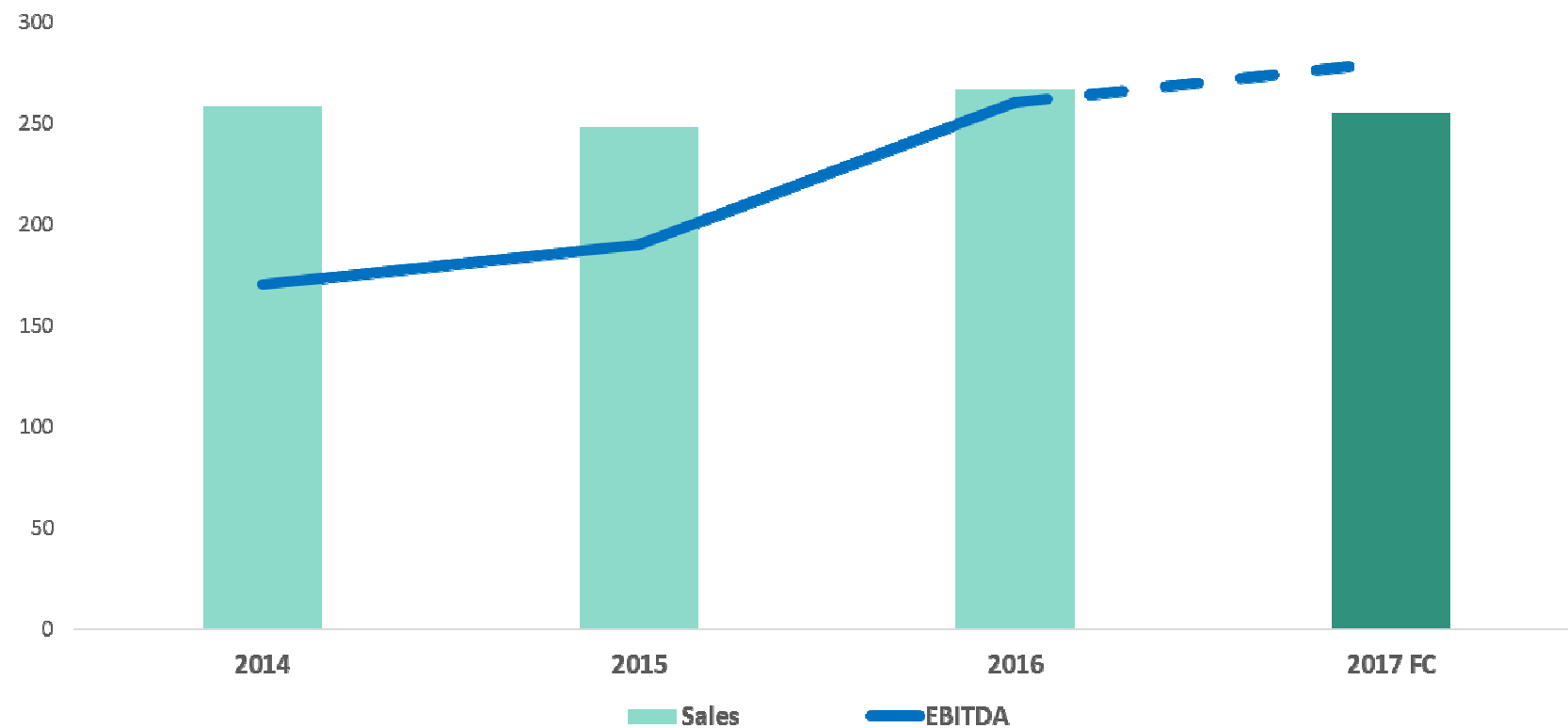


People, Skills, Trust

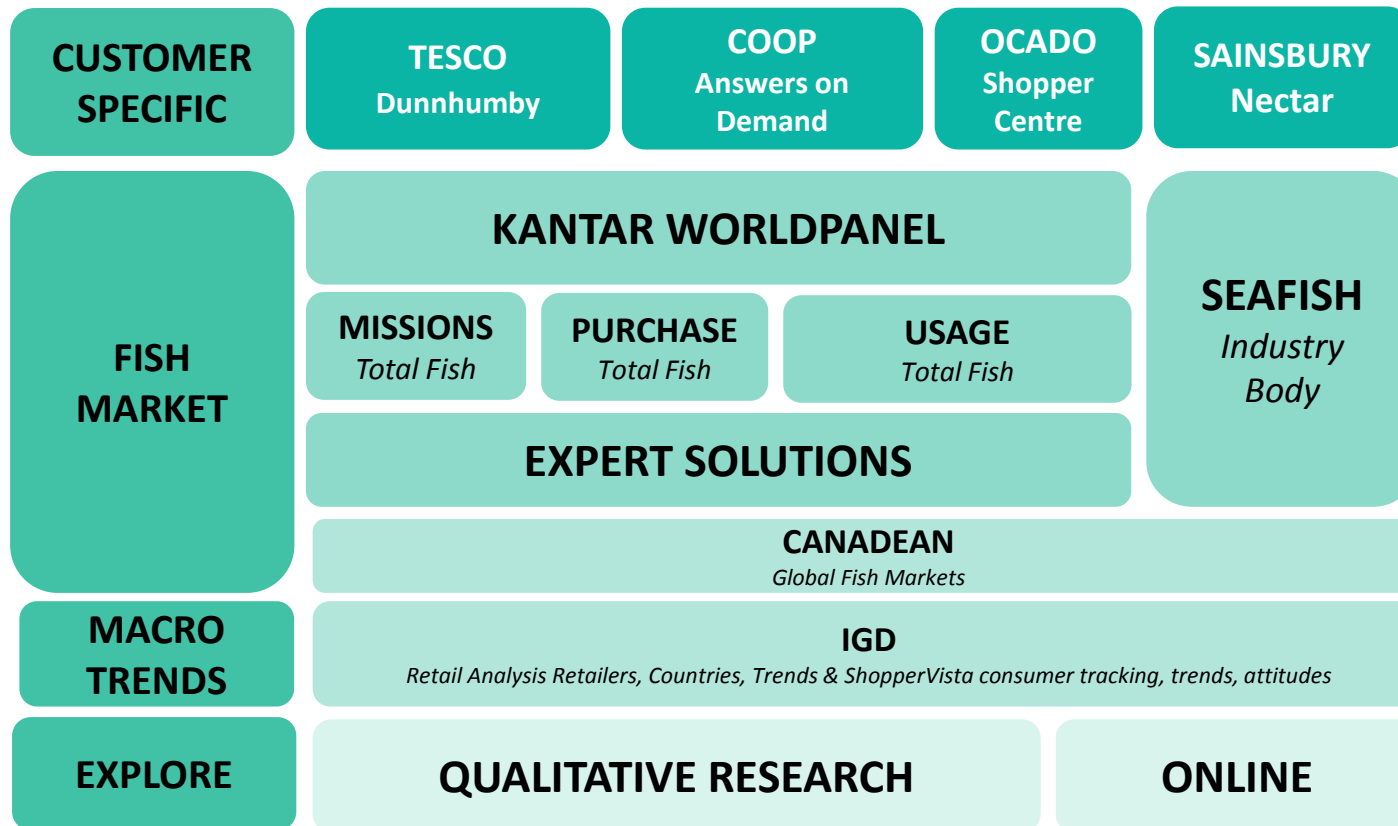
Culture

Sales and EBITDA

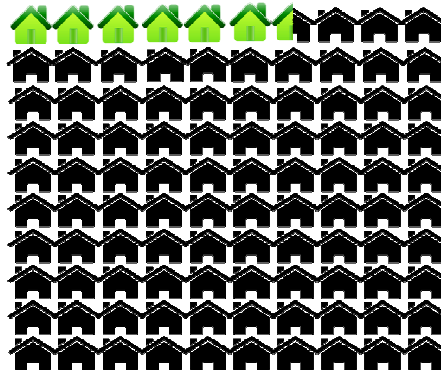
£ m's



Industry leading Consumer Expertise



The biggest selling fish product in the UK



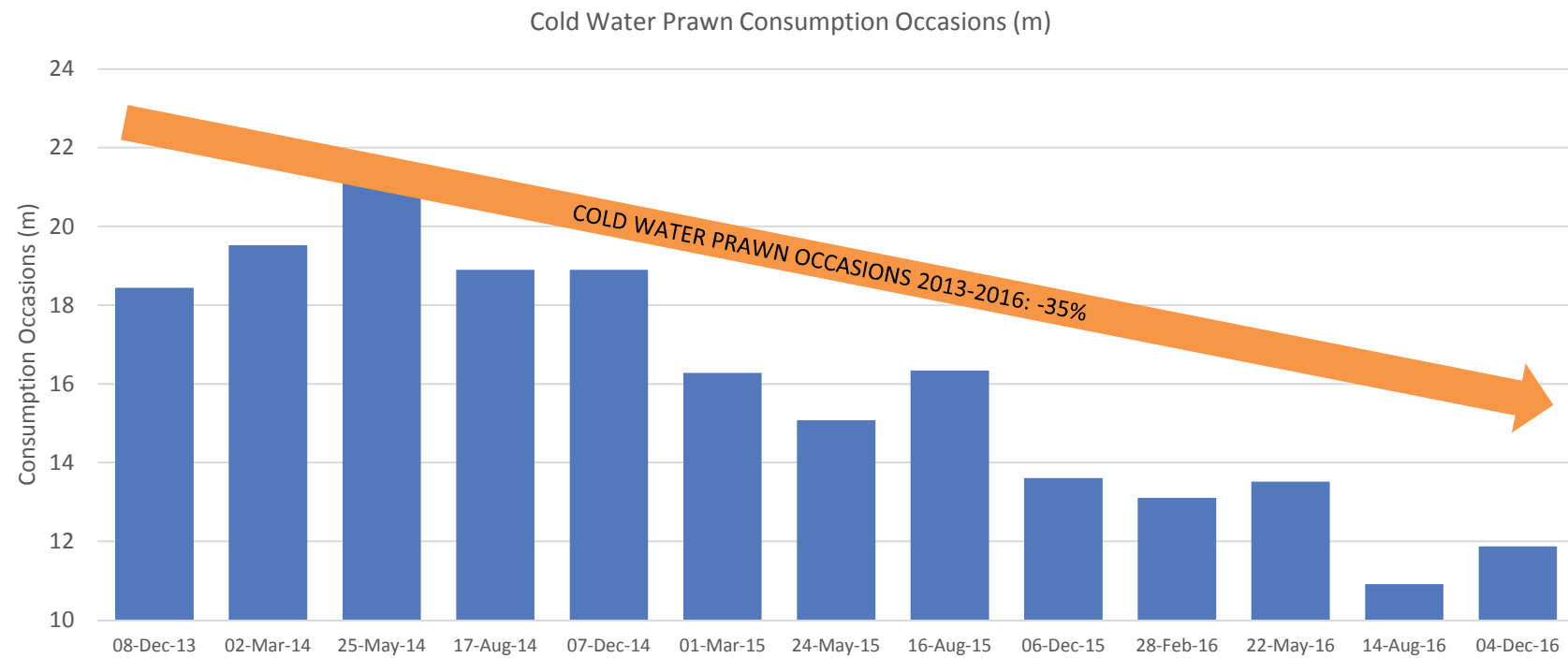
January	February	March	April
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
May	June	July	August
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29
September	October	November	December
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

So What About Cold Water Prawns?



Cold Water Prawn consumption occasions have declined by 35% since 2013

...against a background of 9% growth in consumption of all prawns in the same period



Who Eats CWP?



Mainly Female with 66% of these aged 65+
(WWP 39% 65+)

Who Eats CWP?



Mainly Female with 66% of these aged 65+
(WWP 39% 65+)

ICELANDIC
SEACHILL

When are CWP eaten?



35% occasions are Lunch...but only 18%
of all Chilled Fish is consumed at Lunch
(25% of WWP consumed at Lunch)

Source: Kantar Worldpanel Usage

What Do Consumers Feel About Cold Water Prawns

ENJOYMENT

Total Chilled Fish 84.1%



83.5%

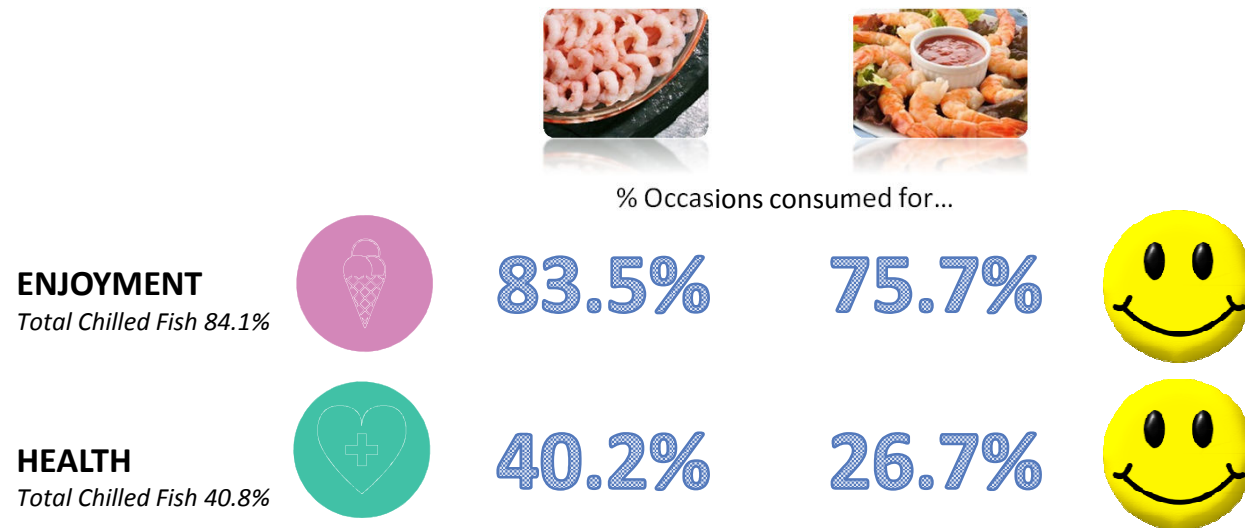


% Occasions consumed for...

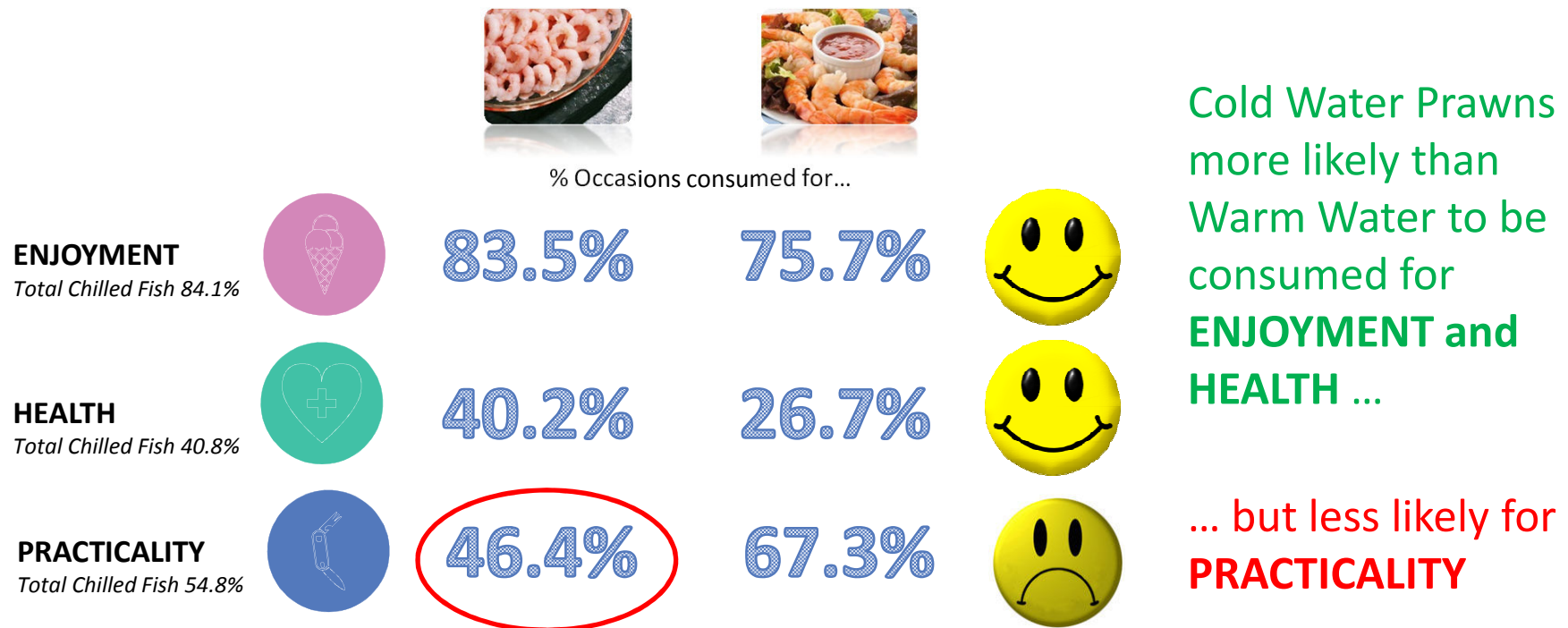
75.7%



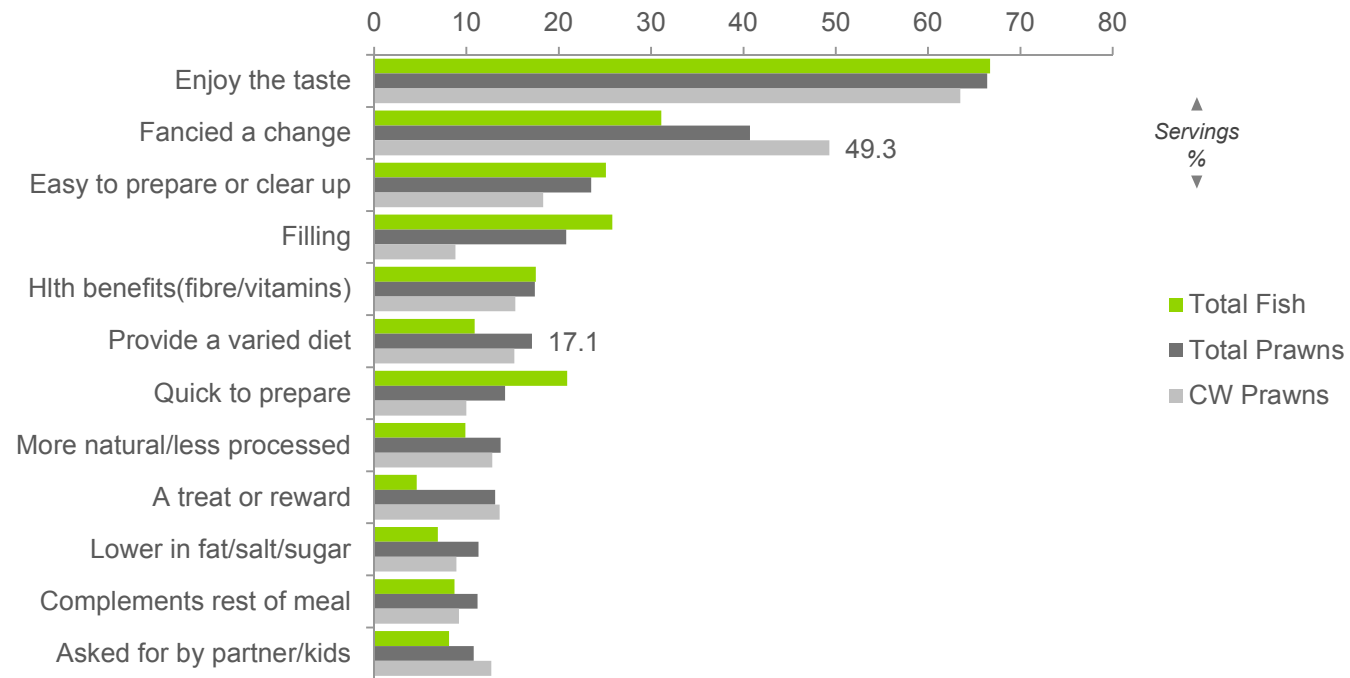
What Do Consumers Feel About Cold Water Prawns



What Do Consumers Feel About Cold Water Prawns

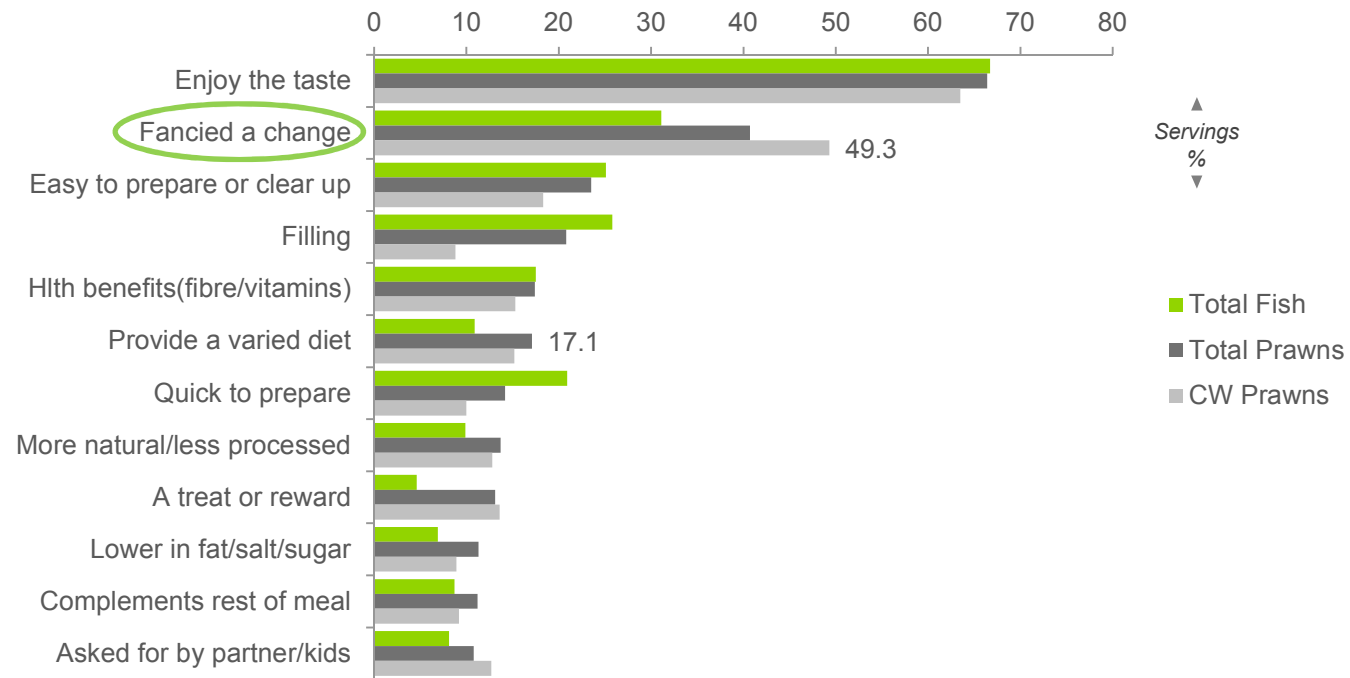


Half of CW prawns are chosen as consumers fancy a change and prawns are seen to provide a varied diet.



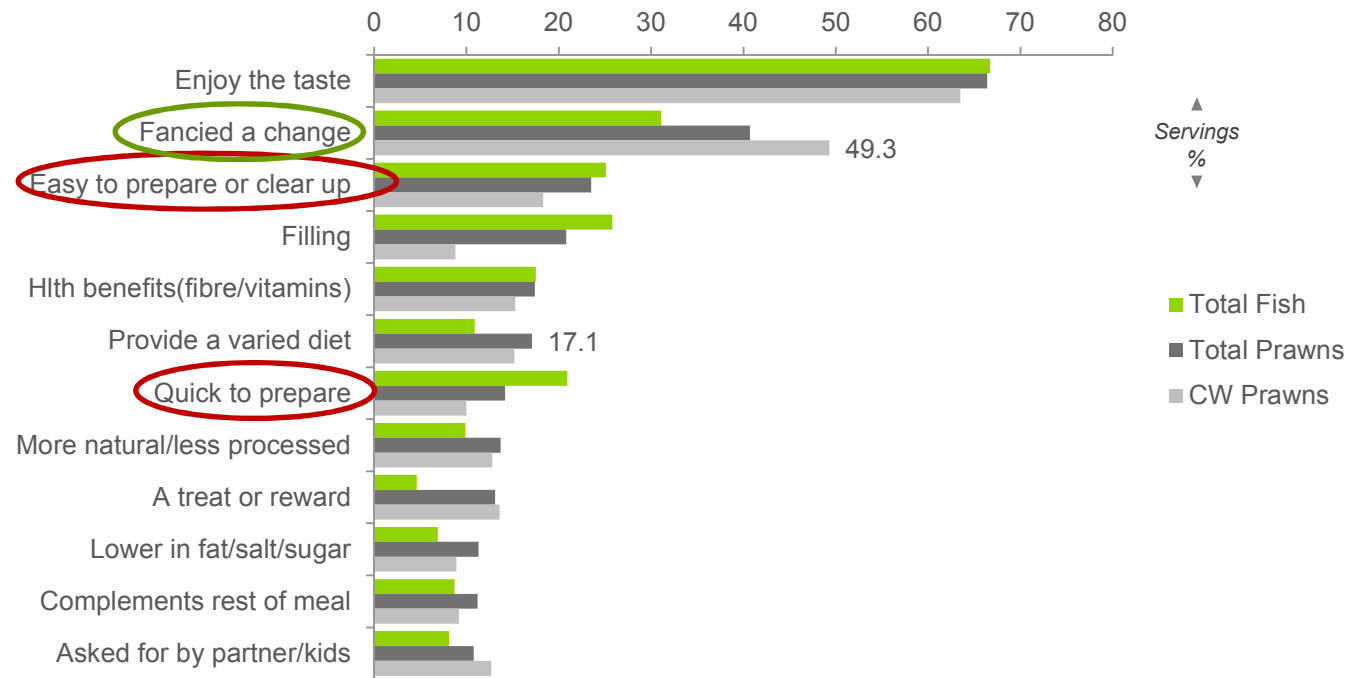
KWP Usage; Total In Home/Carried Out; 52 w/e 30 Mar 2015

Half of CW prawns are chosen as consumers fancy a change and prawns are seen to provide a varied diet.



KWP Usage; Total In Home/Carried Out; 52 w/e 30 Mar 2015

Half of CW prawns are chosen as consumers fancy a change and prawns are seen to provide a varied diet.



KWP Usage; Total In Home/Carried Out; 52 w/e 30 Mar 2015

Addressing “Practicality” will help appeal to younger consumer and less reliance on lunch...

Quick to Prepare



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**Easy to prepare
and clean up**

Source: Kantar Worldpanel

**Complements
rest of the meal**



The Challenge For Cold Water Prawns



Appeal to younger consumer: “Empty Nesters” ...

...to reduce reliance on lunch occasion..



...highlighting shorter preparation time for healthy and tasty meal





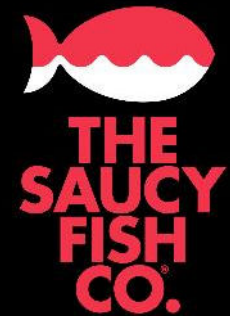
Bringing
new
CONSUMERS
to fish



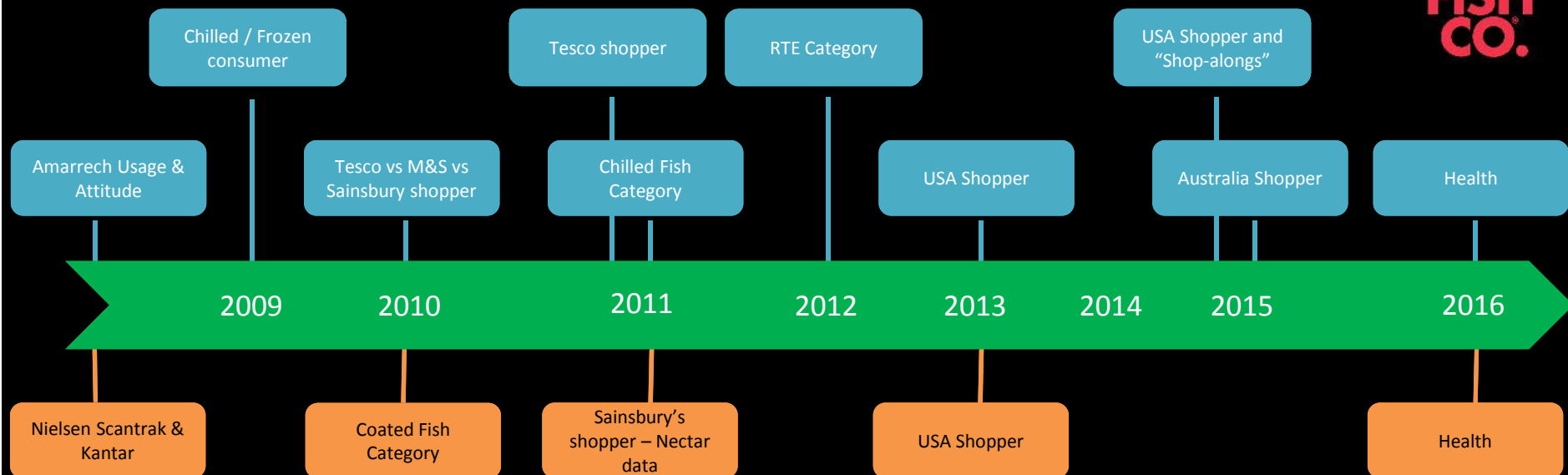
A consumer- insight driven strategy



Research, Research, Research



QUALITATIVE



QUANTITATIVE

Consumer fear



What
do I do
with it?

It's about the dish, not just the fish



We have identified 3 consumer personas



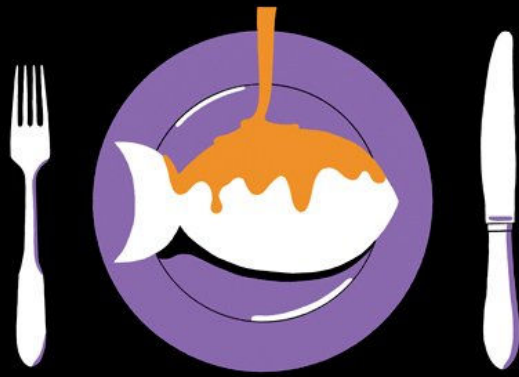
Fresh fish Fanatics



Fish Wanabees



Fish Frighteners



THE BRAND





FISH FANATICS

FISH WANNABES

FISH FRIGHTENERS

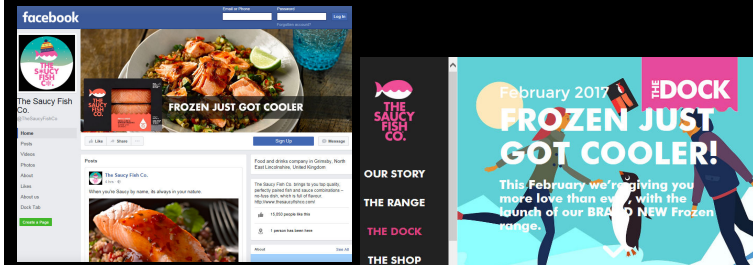


21st Century Marketing

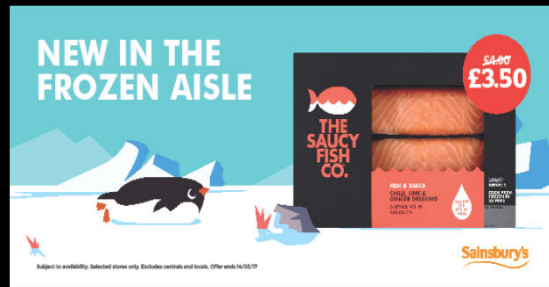
CONSUMER



DIGITAL MEDIA



IN STORE ACTIVITY



PRINT





OUR STORY

THE RANGE

THE DOCK

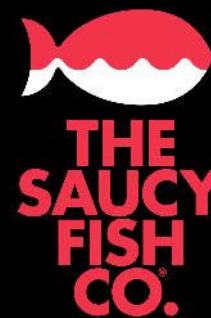
WHERE TO BUY
CONTACT US



THE DOCK

October 2015
KEEPING IT COOL!

As we're well and truly into autumn, with dark nights and winter weather creeping in, October is officially a month of cool.



THE SAUCY FISH CO. FROZEN RANGE HAS LAUNCHED IN...

Sainsbury's



179 STORES



546 STORES



549 STORES

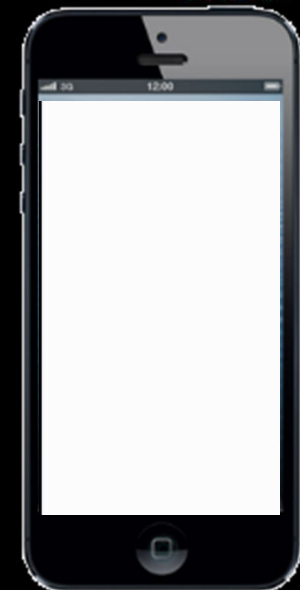


546 STORES



549 STORES

SIGNIFICANT GROWTH
WOW, OUTSTRIPPING
THE CATEGORY –
BRINGING IN NEW USERS



 **FROZEN**

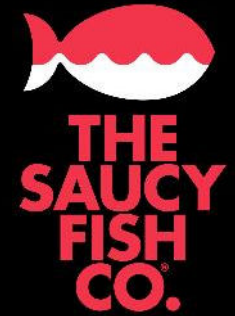




Amazing together



Just to remind you



I am Charles Boardman – Procurement
Director for Icelandic Seachill and

I have just spoken to you exclusively about
the consumer.....