

Scottish Shellfish

# Engaging With Consumers

Shellfish in the Retail Sector and Beyond



# ENGAGING WITH CONSUMERS

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THE  
CHALLENGE

THE WHAT

THE HOW

## The Challenge



# The UK Consumer

### Annual Fish Consumption by country

- |                  |                |
|------------------|----------------|
| • Iceland        | 85 kg per year |
| • Norway         | 50 kg per year |
| • Europe Average | 27 kg per year |
| • USA            | 22kg per year  |
| • UK             | 18 kg per year |

A Seafish report states UK average fish consumption is only one portion a week. Whilst meat consumption is 5 portions per week.

Report highlights a trend away from consuming fish in favour of “ready meals” (e.g. for the microwave). It states that seafood retail sales fell by - 13.6% in the 2021-24 period!

65% of All seafood consumed in retailers last year by volume;

- Salmon 36%
- Prawns WW / CW 13%
- Cod 9%
- Haddock 7%



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# UK Consumption Trends



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Price is still no.1



Busy lifestyles & hybrid work



Consumer see food as medicine



Creates trust and authenticity



Consumers now expect lower impact choices

## 4 Values

**Sustainability**

**Health**

**Community**

**Convenience**

# And those values underpin our business

Our 4 values are key to our ongoing strategy and what drives our cooperative of growers and our team at Scottish Shellfish.

Our values are also important to our customers as a growing number of consumers are concerned about where their food comes from, how its produced and its impact on the wider environment,



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## OUR 4 VALUES

# Environment & Sustainability

Farmed mussels and oysters have the **lowest GWP of any other farmed protein**. They also act as natural water filters, removing excess nutrients from the water that can cause algae blooms. This important eco system service helps to provide a habitat for other marine life, **enhancing bio diversity** and protecting the environment for future generations.

We are proud to say that our farms have been MSC certified since 2012 and more recently we were the first Oyster farm in the UK to be awarded the ASC accreditation.



**Enhances bio diversity**

**Filters nutrients from**

**Low climate impact**

**MSC & ASC certified**



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OUR 4 VALUES

# Nutrition & Health



Nutrient Density Score (protein (100g))

PORK 11.9

POULTRY 9.8

TROUT 4.3

SALMON 4

MUSSELS 17.1

OYSTERS 28.2

✓ High in Protein

✓ High in Omega-3

✓ Low in fat

✓ Low in saturates

✓ Low in sugars

High nutrient density

Contain 13 micronutrients

Low in Fat

High in Protein & Omega-3



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OUR 4 VALUES

# Provenance & Community

It has become more and more important for consumers to know where their food comes from. We are proud to be producing Scottish produce in some of the most remote places in Scotland and Shetland. **Smaller population** means **less pollution** and the strong tides around the highland and Islands ensure there is a constant source of food for the mussels and oysters to thrive.

Supporting these rural communities is vital for their local communities and we work closely with our growers to ensure that we are promoting and developing skills in the area to encourage younger people into the industry.



**Supports fragile rural economies**

**Cooperative working toward shared goals**

**Provides employment in rural areas**

**Less pollution in areas with lower population**



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OUR 4 VALUES

# Value & Convenience

From farm to pack in 24 hours, taking the hassle out of cooking and opening up more consumers who may be put off by preparation.

Mussels and Oysters are also convenient for our wholesale and foodservice partners as they are delivered live and can be prepared by chef in less than 10 mins. Our mussels are on the menu in **gastro pubs** and **michelin star** restaurants , a great protein that can be elevated by chefs to suit the needs of their customers.



**Grown in 3 years  
cooked in minutes**

**Microwave or cook on  
the hob.**

**Vac Packs mean no  
preparation needed**



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## Sustainability at Morrisons

Affordable and good quality food is at the heart of Morrisons. To achieve this, we need to maintain a healthy planet, strong communities, and foster a commitment to transformative change. Our Sustain programme comprises five chapters that reflect the breadth of the challenges our food system faces, from carbon emissions to healthy and sustainable diets. As one of the UK's largest retailers, we believe it is our responsibility to support a positive transition towards a healthy and sustainable food system. That's why our purpose is creating value for our stakeholders while earning the trust of our customers.

Find out more about how we reducing our energy-use and our impact on the climate.

### Chapter 1: Energy & Climate

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[Read More](#) →

Find out more about how we reduce our packaging, waste, and water-use.

### Chapter 2: Packaging, Waste & Water

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[Read More](#) →

Find out more about the transformative work we're doing by sourcing sustainably.

### Chapter 3: Sourcing Sustainably

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[Read More](#) →

Find out more about how we support healthy and sustainable diets.

### Chapter 4: Healthy & Sustainable Diets

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[Read More](#) →

Find out more about how we are growing diversity, protecting people, and supporting communities.

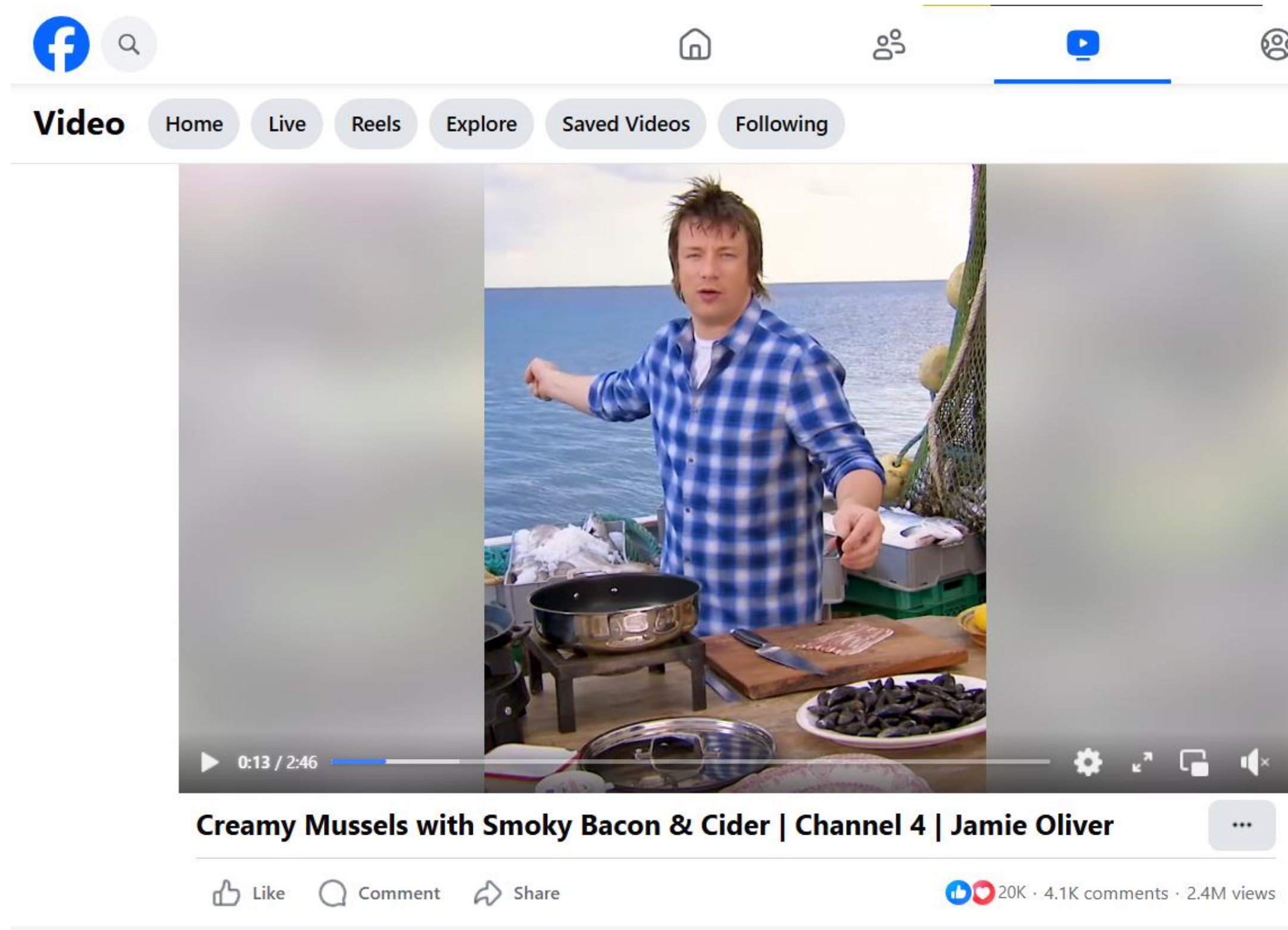
### Chapter 5: Diversity, People & Communities

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[Read More](#) →



# Getting the message to customers...



# Working with our retail partners...





# A great foundation but...

We must understand the consumer.... Recent Scottish Shellfish consumer research

- They like / dislike
- Want - restaurant experience
- Expect – packaging, price point
- Fears / confusion – R in the month, closed / open shells

Innovation;

- Products that taste good
- Excites
- Serves their needs

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