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A jump in plant-based fish sales in 2020 has given way to a 16.6% decline. Can the market recover?

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Vegan fish & chip shops are proving an inspiration to the fish-free sections in supermarkets

60 Seafood shake-up

Goujons and prawn crackers are expanding the category, but fish fingers remain the favourite



Fish out of water

A fishy taste and texture is hard to replicate. But plant-based brands are busy innovating, and sales have reached over £5m as a result

Megan Tatum

Four years ago you'd be lucky to stumble across a plant-based fish finger. In 2017, the fish alternatives category was worth just over £2m [Kantar]. What's more, fish fingers accounted for an overwhelming 98% of sales, with no brand brave enough to tackle the likes of fillets, seafood or sushi.

How times have changed. In the past year, value has reached £5.1m [Kantar 52 w/e 5 September 2021]. Granted, that's down from last year's high of £6.2m, which was aided by a lockdown boost in frozen food purchases. But it's still a far larger category than it was – as evidenced by plant-based fish fingers now accounting for just 39% of sales.

British shoppers can now get their hands on everything from fishless fillets to vegan scampi, no-prawn crackers and even 'tuna'

steaks made from dehydrated watermelon. From the big four to the restaurant chains, there is growing recognition of the sizeable number of consumers looking to ditch or cut back on fish.

So can plant-based fish continue on its long-term growth trajectory? What formats are proving popular? And what culinary tricks and ingredients are brands using to mimic the texture and mouthfeel of seafood?

Fish alternatives are still far behind the scale and penetration of plant-based burgers,

“Recent coverage of marine destruction has prompted many to stop eating fish”

sausages and mince. Sales of meat-free sausages alone amounted to £90.8m this year [Kantar 52 w/e 8 August 2021] – making it nearly 18 times the size of plant-based fish.

Even so, the potential of the category is compelling. The sustainability of fish farming and seafood has gained a far greater profile in the past year thanks to controversial documentaries such as Netflix's *Seaspiracy*, prompting a rising interest in alternatives.

The effect has been witnessed by Gill Riley, marketing director at Quorn Foods UK, which launched a fishless scampi product in spring. “Sales of fishless products are seeing a rise as huge numbers of consumers realise the increasing demand that's being placed on our oceans and seas from the growing global population,” she says.

That's backed up by Samuel Dennigan, founder of plant-based brand Strong Roots. “With British and Irish customers already ↗



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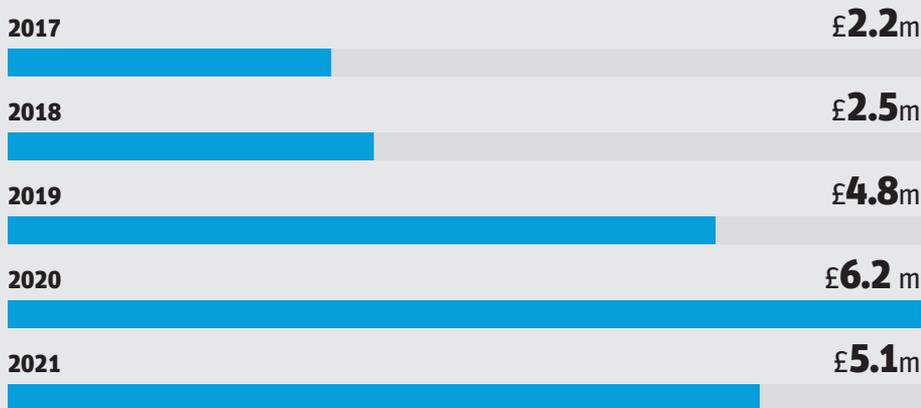
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The rise and thaw: value sales of plant-based fish by year



Source: Kantar, value sales to September in respective years

- Plant-based fish is oceans away from plant-based meats in the UK. In the year to 5 September, sales of fishless fish reached £5.1m, with a household penetration of just 2%. By comparison the total meat-free category, which includes some fish alternatives, was £659.9m in the year to 8 August.
- Absolute size isn't the only difference. While the meat-free market grew 16.3% in value sales in the year to 8 August, fish alternatives fell by 16.6%

in the year to 5 September, alongside a 16.1% drop in volumes.

- The fall is attributable to a move away from frozen, which Kantar says makes up the biggest share in plant-based fish. The spike in 2020 "was particularly driven by younger families", it says. "With children at home last year family favourites benefited, but with the return to school there is now less demand."
- Longer-term trends are more encouraging. Fish

alternative sales have grown by 133.1% in the past four years. And while fish fingers represented 98% of plant-based fish in 2017, they now make up only 39% of the category, while fish fillets hold 35% of the market and other fish alternatives make up 26%.

KANTAR

Kantar's Worldpanel FMCG service monitors consumer behaviour across Great Britain. Its primary panel tracks take-home purchases of 30,000 demographically representative households. Data on consumption habits, nutrition and out of home sales is collected through subsidiary panels. Visit kantarworldpanel.com for details.

"Ultimately it's about the textures and flavours people are accustomed to eating"

Ⓞ making the move from meat, cutting out fish is next on the menu," he says. "Recent coverage of marine destruction and overfishing has prompted many consumers to extricate fish from their diets."

This is good news for the likes of Moving Mountains, which launched its plant-based fish fingers prior to Seaspiracy's airing. "We definitely noticed an uplift in people consciously looking for plant-based fish alternatives and the sector is really growing because it's been put on people's radars," says CEO and founder Simeon Van der Molen.

Plant-based takes on familiar seafood options are soaring as a result. "We're seeing people drawn to classic seafood favourites including fish fingers, fish burgers, tuna mayo and the like," says Chad Sarno, co-founder and chief culinary officer at Gathered Foods, whose Good Catch brand manufactures a range of plant-based fillets, tuna and crab cakes. "I think ultimately it's about the textures and flavours they are accustomed to eating."

On thin ice

Much of the action within plant-based fish is happening in the freezers. This explains why, despite the overall growth in the plant-based market, sales of seafood alternatives are down on last year. It's now facing some tough comparables on 2020, when consumers turned to frozen food in their droves.

"We saw a significant increase in frozen sales during the pandemic, as families had more time to cook at home and looked to stock up for longer periods," says Quorn's Riley.

So the question is whether plant-based fish sales can regain their momentum as life returns to some kind of normality. Many brands are pinning their hopes on convenience credentials, which are becoming more crucial as Brits venture out once again.

"Quick and easy preparation and broadly consistent cooking methods mean that families can easily add plant-based meal centres to their shop," says Birds Eye marketing manager Jess Ali. "Shoppers are still learning how to add more plant-based alternatives to their diets with ease, so convenient products that don't require high levels of preparation have high appeal."

Beyond convenience, frozen products can also highlight their eco-friendly attributes – for example, their ability to limit food ↻

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The role of hospitality in driving fishless NPD

In 2018, what was thought to be Britain's first vegan fish and chip shop opened in London. Launched by traditional chippie Sutton & Sons after its trial vegan menu proved popular, it served up everything from plant-based prawns and scampi to battered fish.

In the years since, fish alternatives have popped up on menus all over the UK. In October, the No Catch company opened up on Brighton seafront, serving up 'tofish' and chips. Then in January Lewis Hamilton's vegan restaurant Neat Burger created its own plant-based take on McDonald's Filet-O-Fish using jackfruit. A raft of regular pubs and restaurants have tried

vegan twists on classic fish dishes too.

So why is hospitality leading the way when it comes to creative fish alternatives?

"We find chefs are more than willing to experiment in plant-based, so you get some really exciting dishes being served to customers," says Simeon Van der Molen, CEO of Moving Mountains. "Supermarkets are definitely being led by this, and are getting more adventurous, but we'd like to work with our retail



partners further to make their plant-based offering even more diverse."

This is echoed by Chad Sarno, founding chef of Good Catch. "We are seeing more restaurants adding plant-based seafood to their menus and this is set to increase."

Where hospitality outlets aren't equipped with top plant-based chefs, the trend is creating fresh opportunities for plant-based brands. Native Snacks' vegan prawn crackers were stocked by the likes of Rosa's Thai Cafe and Pho before entering retail, for example. Quorn's range is also making its way on to hospitality menus as an easy swap.

So while hospitality may have led the way in bringing vegan fish and chips to the mainstream, growing demand for plant-based across less specialist UK restaurants is both an opportunity and inspiration for grocery.

"Plant-based fish has yet to catch up – a fishy taste and look is the hardest to replicate"

❗ waste. "At Moving Mountains, sustainability is one of our core missions, which means we will always prioritise frozen," says Van der Molen.

Of course, the frozen aisle doesn't have a monopoly on plant-based fish. Last year, Good Catch launched into Tesco its ambient tuna alternative, made from a blend of peas, chickpeas, lentils, soy and beans.

Native Snacks also launched its vegan 'prawn' crackers in October. "The majority of focus has been on frozen and the chilled aisles," says co-founder Charlie Bowker. "However, we are looking to disrupt the ambient aisles with our like-for-like alternative snacks. We believe there is huge room for disruption within snacks."

Fishy business

Chilled, ambient or frozen, the success of these products will come down to one common factor: how accurately they recreate the flavour, texture and mouthfeel of seafood.

While the dense gooeyness of a beefburger can be emulated with the right mix of veg or plant-based proteins, the light and flaky texture of a fish fillet has been harder to capture.

"For our debut tuna product, we worked on the recipe and development for over two years before it hit the shelves and are constantly refining," says Sarno of Good Catch.

"We spent the first year refining the texture, because getting the unique texture of seafood just right was paramount for the consumer experience. Once the texture was in a good place, we focused on the flavour and nutritional profile."

"Plant-based fish products have yet to catch up with known vegan meat alternatives because both a fishy taste and look is the hardest to replicate," explains Tessa Menge, head of marketing at Vegan Finest Foods. But she believes brands like her company's own Vegan Zeastar are making headway with "unique and revolutionary plant-based seafood, with tastes and textures that perfectly mimic their fishy counterparts".

The company's most popular product is vegan sashimi, which contains tapioca starch from the cassava root, as well as flax and rapeseed oil. It is designed to be served in a poke bowl like the Hawaiian seafood dish, or as an alternative to ceviche or tuna tartare.

Even in the case of the classic fish finger, plant-based alternatives are becoming ➔

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“It’s challenger brands which really push the boat out in terms of taste and texture”

increasingly sophisticated. For its first foray into the category with its Fishless Fingers in June, Birds Eye aimed to “closely replicate the tastes and textures of our current fish fingers” says Ali, opting for a rice protein to deliver a “flaky fish-like texture”.

Birds Eye believes its heritage in the fish category will work in its favour when launching ‘fishless’ alternatives. “Our established brand heritage and leadership in the fish finger category put Birds Eye in the perfect position to create a plant-based alternative,” Ali says, citing research that shows 88% of consumers associate fish fingers with the brand.

Still, that doesn’t mean the big boys have a monopoly on the market. For Van der Molen, challengers have led the way and will continue to do so. Indeed, the Moving Mountains brand as a whole has more than tripled its value to £3.2m in the past year [Nielsen 52 w/e 11 September 2021].

“Moving Mountains were the creators of the UK’s first vegan bleeding burger and remain a proud challenger brand,” he says. “We are still paving the way in terms of innovation, and we see other challenger brands also being creative in their offerings every day. We believe it’s these challenger brands which really push the boat out in terms of taste and texture.”

Quorn’s Riley argues there are opportunities for new and old brands alike. “There’s no doubt that the market has become very busy, with lots of new innovation penetrating this space throughout the last 12 months,” she says.

“Data shows that new brands and products are performing well across meat-free and bringing new shoppers into the category, which is great to see. It’s the brands and products that shoppers know and love which are also maintaining frequency, and ultimately keeping shoppers in the category.”

The view is echoed by Sarno. “There’s room in the category for all kinds of products, and since we’re a mission-driven, impact-focused company, we welcome new brands into the space,” he says.

“I think we’ll see more mainstream brands enter the plant-based space in the coming few years, and that’s great for the consumer. When consumers have lots of choices, brands have to get better and products have to get better, so the consumer – and the sealife saved – wins.”

The Veg Finger

Launch date: May 2021 **Manufacturer:** Strong Roots

Made from 100% “nutrient-packed” root vegetables, The Veg Finger is wrapped in a gluten-free crumb and available from the freezer aisle (rsp: £3/224g), using sustainably farmed cauliflower, parsnips and onions to create an alternative to the classic fish finger. The brand describes it as “comfort food, without the nets” or “a dolphin-friendly delicious option that doesn’t contribute to the destruction of the planet’s fisheries”. It rolled out across all major retailers in May.

Vegan Pr*wn Crackers

Launch date: October 2021
Manufacturer: Native Snacks

In an alleged world first, Native Snacks rolled out its plant-based prawn crackers in October to retailers including Asda and Planet Organic (rsp: £1.60/60g). Made with tapioca starch as a base and plant-based prawn flavouring, the snacks are currently available in two variants: Original Prawn and Sweet Chilli.

Green Cuisine Fishless Fingers

Launch date: June 2021
Manufacturer: Birds Eye

Already available in Sainsbury’s, with plans to roll out to other retailers from 2022, these Fishless Fingers (rsp: £2.50/336g) are covered in the signature Birds Eye crumb. The ‘fish’ content is made using rice protein packed with omega-3. The launch follows the success of previous Green Cuisine products that mimic classic Birds Eye versions.

No Fish Goujons

Launch date: April 2021
Manufacturer: Finnebrogue

These No Fish Goujons by Finnebrogue’s Naked brand landed in Sainsbury’s and Morrisons in April (rsp: £3/250g). They are made using potato flakes, rice flour, vegetable fibre and lemon juice all encased in a wheat flour batter. Finnebrogue says it provides “next-generation plant-based foods that are good for people and planet”.



