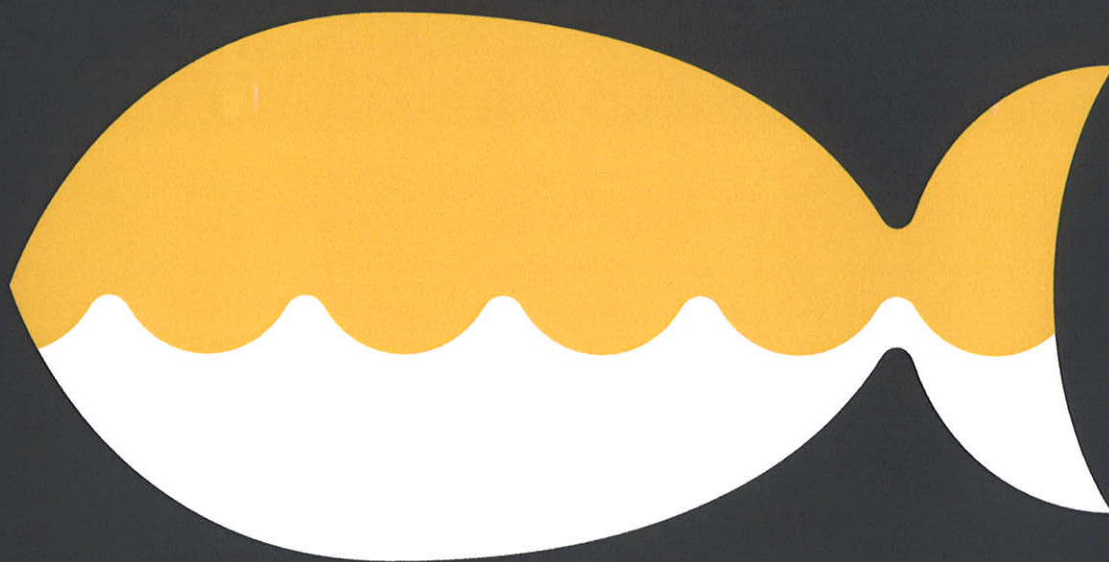


From tiddler to titan: the story of the Saucy Fish



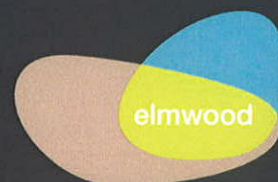
Category
4.0 Packaging

Sub Category
4.1 Branded Food

Client
Seachill

Design Consultancy
Elmwood

Date
January 2010



Executive summary

**THE
SAUCY
FISH
CO.™** 

Imagine you're an own-brand supplier of chilled fish. One day, your key client, Tesco, challenges you to create a winning product strategy to boost sales across their entire underperforming chilled fish category.

Would you have predicted that a £22,750 design investment could, in one year, become £10million of projected sales? With next to no marketing support or promotional activity? That's what happened when chilled fish supplier, Seachill, asked Elmwood to create a brand and packaging for The Saucy Fish Company – a new, premium range of chilled fish and sauces.

From

£22,750 to
£10million

projected sales for Saucy Fish
in its first year with no above
the line support

In first 13 weeks there were only 2 weeks on POS promotion. There has been no ATL promotion at all since launch.

Paid for itself on

1st day

of sales

The design paid for itself on the first day

3 sku's were trialled in 332 Tesco stores at launch in January 2010. Initial investment for 3 sku's was £13.5k. First day sales were £22k.

497%

sales increase
in six weeks

Sales within Tesco's Added Value Fresh Range category saw a 497% increase over the period from March to mid-April. And we're not talking about a high-volume Value product: Saucy Fish is a premium product retailing at £4.00.

Project overview



The challenge:

People don't know what to do with fish. And they don't know what sauce goes with which fish



Our task:

Position Saucy Fish as the solution: Experts in the Fish and Sauce category

1. Outline of brief

Business challenge

Tesco's chilled fish category was underperforming. To boost sales, they challenged Seachill to come up with a winning product strategy. Seachill then came to us. Once we'd discovered that Tesco had only one or two premium chilled fish products on offer which were not doing the premium job they were supposed to do, and with little innovation in the category, we realised we had a golden opportunity to make a real splash in a stagnant sector.

Consumer challenge

Consumers are generally unsure about what to do with fish, and how to cook and serve it. Added to this lack of consumer interest was the category packaging itself, which is uniformly lacklustre and practically invisible next to the more 'foodie', dynamic chilled food cabinets. Our work was cut out.

2. Description

Seachill came to us with a basic 'fish with sauce' product. Building on this and the need to make chilled fish more appealing, our packaging concept brought fresh fish and sauce together – a category first.

3. Overview of market

Chilled fish is a low-interest, low-growth category. Even though Tesco have a 28% market share of the UK's grocery category, they only have a 22% share of the fresh/chilled fish market – an underperformance of 6%. In other words, lots of people are shopping at Tesco but not many were buying their fresh or chilled fish. In fact, Tesco were losing customers to Waitrose and M&S.

Project overview cont.

Simple Proposition Simple name



4. Project launch date

January 2010

5. Size of design budget

An initial investment of £13,500 to trial three SKUs in 332 Tesco stores
An additional investment of £9,250 for a further ten SKUs, rolled out across all 800 stores
Total investment = £22,750

6. Outline of design solution – Simple proposition, simple name

Our mission was clear: create an authoritative, premium brand identity and packaging concept. This had to:

- Position Saucy Fish as the experts in the Fish and Sauce category
- Attract customers and reassure them that chilled fish is a safe, simple and delicious option
- Inject the category with some much-needed personality, attitude and innovation.
- What's in a name? – We had to “tell it like it is” because of lack of consumer understanding.

We combined vibrant design with clear signposting. The simple graphic of a fish topped with sauce immediately communicates ‘fish with sauce’. Which meant we didn't need to show the customers how it's served – one of the biggest consumer challenges.

The ‘ping’ of white with the ‘wave’ of sauce draws your eye to the range, while the different colours for the sauces aids navigation. The brand language takes things a step further with a tone of voice that's designed to charm, disarm and be accessible to any home cook.

Packaging innovation

We used vacuum packaging to clearly showcase the quality of the fish, and an integral cardboard sleeve to show off the sauce (contained in transparent sachets).

To create better stand-out and accessibility, we designed ‘shelf-ready’ trays so the packs could be merchandised vertically rather than horizontally.



Summary of results

Saucy Fish will be worth £10m in its first year

We turned a £22,750 design investment into £10 million projected sales

And this was just year one in only one of the big four grocery outlets.

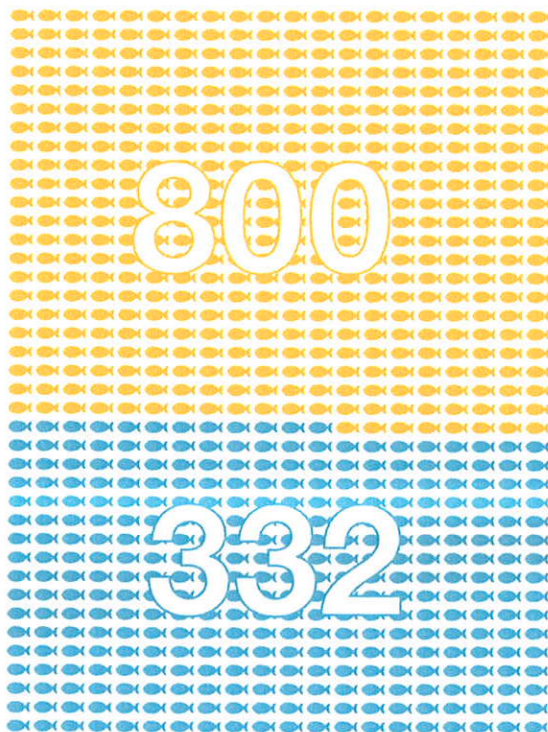
This investment paid for itself on day one

The initial £13,500 design investment (3 sku's) paid for itself on the very first day of being trial-launched in 332 Tesco stores in January 2010 – £22k sales on first day, generating sales of over £100k per week.

Increase in market distribution

↑ 332 to 800

After the first month, Tesco increased its distribution from 332 stores to 800, in just four months.



Summary of results cont.

Total **sales** from launch to end of April 2010 in Tesco alone

£750,000

497% sales increase in six weeks

Sales within Tesco's Added Value Fresh Range category saw a 497% increase over the six-week period from March to mid-April – with very little promotional activity.

Total **profit** from launch to end of April 2010

£60k (gross)

Total sales from launch to end of April 2010 – £750,000
Total profit from launch to end of April 2010 – £60k (gross)

£40k ROI to date

Saucy Fish has generated sales of £750,000 in the four months since launch – a ROI of £40k to date.



**£22,750
Investment**



**£40k
ROI to date**

Summary of results cont.

3x normal market growth

Tesco's chilled fish category has out performed the market norm 3 times over

£10m growth

in market value
at Tesco

Increase in market share (triple the growth of the UK market)

Considering Tesco had been underperforming by 6%, it's market share in the UK's chilled fish category has grown by 6% against an average market growth of 2% – outperforming the market three times over.

Tesco's market share of the UK's chilled fish category at end of 2009 was 21.7% (value £282.4m). At 18th April 2010, Tesco's market share has grown to 22.3% (value £292.4m).

Increase in market value

Tesco's market value in chilled fish category has grown by **£10m, of that Saucy Fish accounts for 10%**. This means that Saucy Fish is acting as a signpost for the category, and is attracting more customers in to shop it.

Consumers can't get enough

Repeat and trial rates are impressive. The repeat rate is 19% after 12 weeks against a category average of 12%. And 39% of shoppers have purchased more than one variant.

Dear sirs, My wife and I have just tried your lemon and pink peppercorn sauce on cod and found it to be top restaurant quality. This is the first time we have tried your products and it most certainly won't be the last. We will use your products to entertain with and also recommend them to our friends. **Truly Great Product!!!!**,

Kind regards, James Pearse.

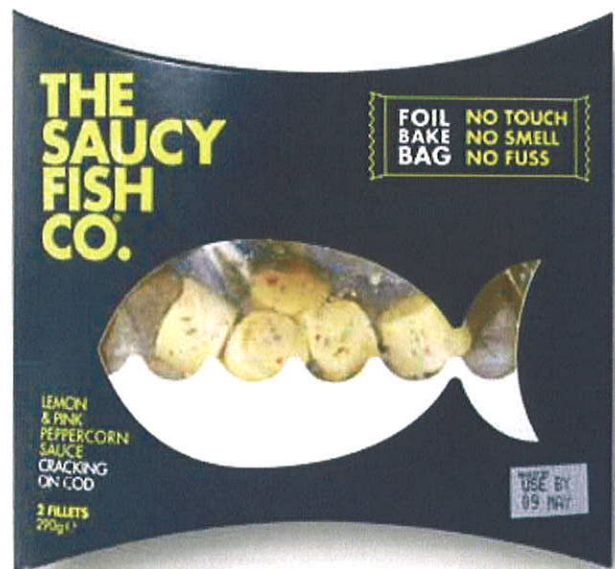
"I've just tried your Haddock with mustard and dill vinaigrette and it was absolutely beautiful!!!!!! I came across this product in Tesco and having never seen or heard of you before, I thought I may as well give it a go and am so pleased I did. Reasonably priced, easy to cook, no bones (and that's a big plus) and the vinaigrette, just gorgeous. Can't wait to try more in the range!!!.

Paula B, Leyland Lancs.

Summary of results cont.

Range extensions on the way

This runaway success has paved the way for Tesco to commission further category innovations. Saucy Fish will be launched on Fish Counters at the end of May. We've just created packs for a cook-in-the-bag product, which will be on shelves from May 2010. And plans are underway to create the all-encompassing Saucy Food Company which will be a meat and sauce combo.



Research resources

All our statistics and results have been taken from and verified by

**Dunhumby,
Kantar World
Panel (TNS)
and Ex Factory**



Other influencing factors?

We achieved all of the previous with:

**No ad campaign
No PR campaign
Very little POS promotion**

The success of the Saucy Fish product range is, and continues to be, down to the accessible, navigable packaging concept and design, its friendly, reassuring tone, and its strong, inspiring presence in the chiller cabinet.

It's all going swimmingly

Being a white label supplier, this was the first time that Seachill had ever invested in design. What started off as uncharted waters quickly transformed into productive, profitable territory for all concerned. In fact, Seachill are so pleased with the results that they've agreed to give us a £10,000 bonus when sales hit the £10m target. We're waiting in for the postman.

And don't just take our word for it, Saucy Fish has just won the prestigious Seafood Prix d'Elite award – the world's biggest seafood exposition – for the best new Seafood Product Line, awarded on 27th April in Brussels. www.thesaucyfishco.com

Surf's in

There is potential for further growth in the UK, as Saucy Fish is currently only available in 1 out of the Big 4 supermarkets. Just to recap, we've also created designs for a bake-in-the-bag fish with sauce product, which will be launched in all 800 Tesco stores from May 2010. And there are plans to extend the brand into The Saucy Food Company, which will sell meat with sauce products.

The client is delighted, Tesco is delighted and we're over the moon. Saucy Fish looks set to become one big fish in an increasingly large pond.