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**SEAFOOD
NUTRITION
PARTNERSHIP®**



SEAFOODNUTRITION.ORG

SUSTAINABLE SHOPPERS

BUY THE CHANGE THEY WISH TO SEE IN THE WORLD

A STRATEGY GUIDE BY

nielsen
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STRATEGY: VIEW YOUR EVERYDAY ANALYTICS THROUGH A SUSTAINABILITY LENS



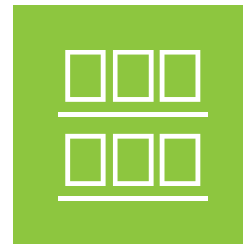
MARKET SHARE



PRICING



PROMOTION

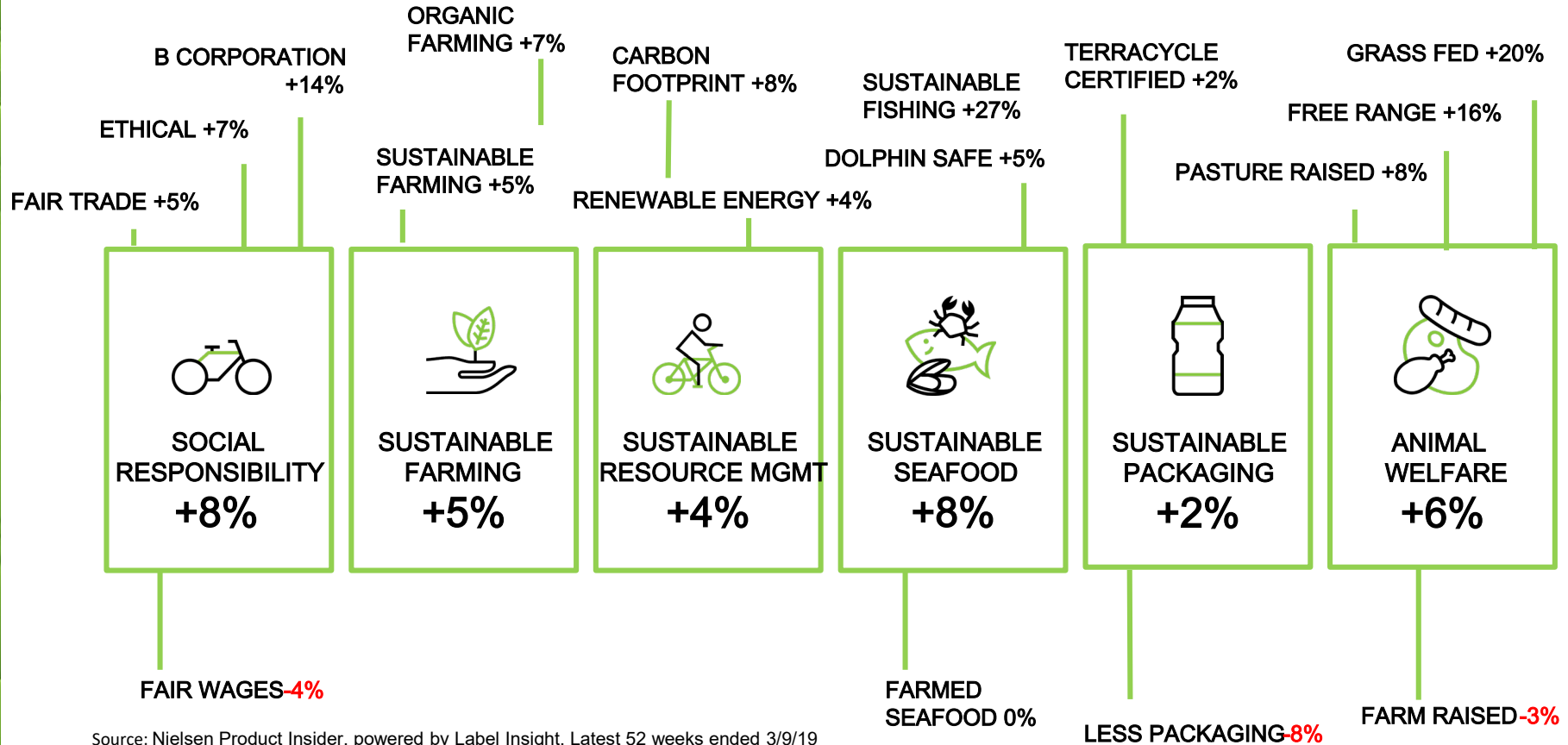


ASSORTMENT



CONSUMER

ACTION: CREATE NEW OPPORTUNITIES FOR GROWTH ACROSS THE SPECTRUM OF SUSTAINABILITY



Source: Nielsen Product Insider, powered by Label Insight, Latest 52 weeks ended 3/9/19

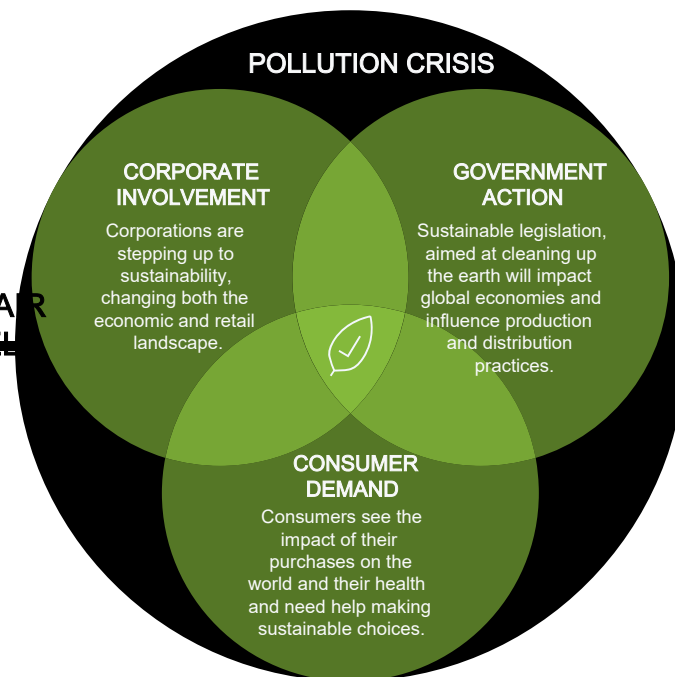
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STRATEGY: ZOOM OUT IN ORDER TO ZOOM IN

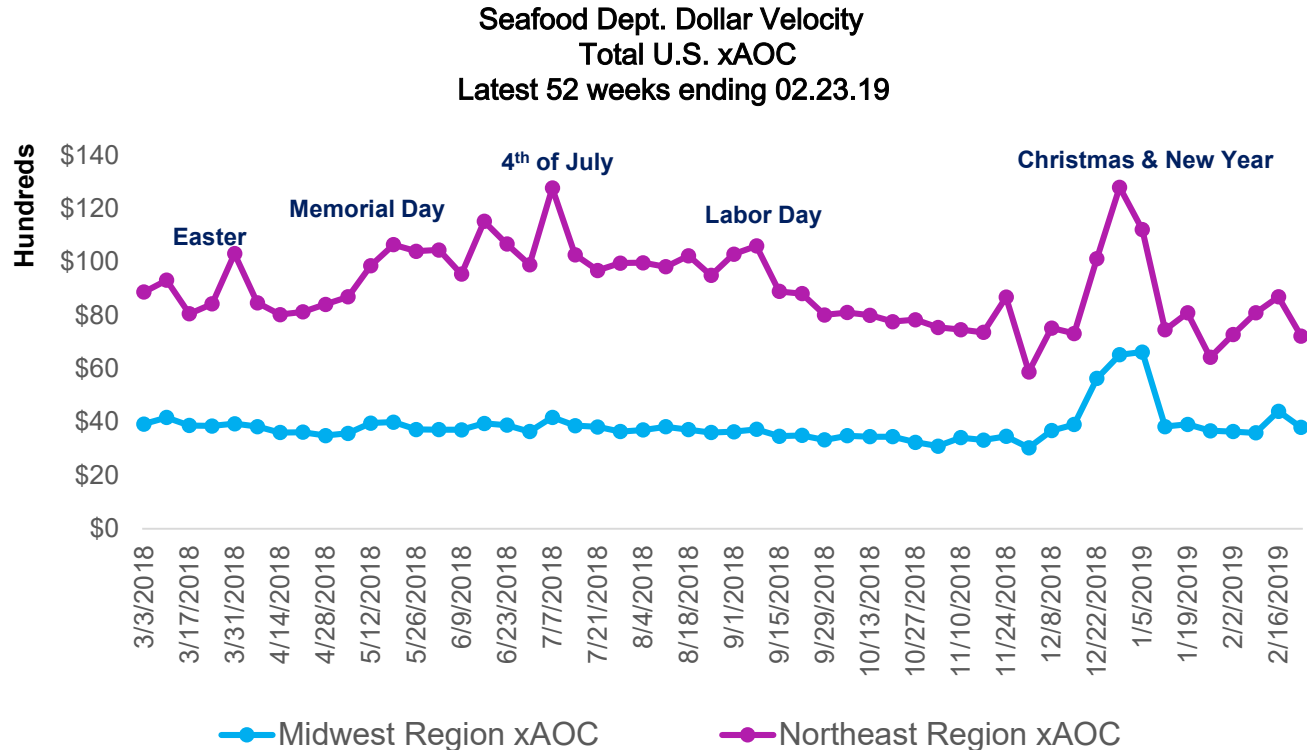
WHAT MATTERS

How are these forces of change pushing your brand or company forward? What are consumers expecting of your company over the long -term?

THE WHO ESTIMATES **26 MILLION PEOPLE** GLOBALLY DIE FROM ENVIRONMENTAL HEALTH RISKS ANNUALLY WITH AIR AND WATER POLLUTION REACHING DANGEROUS LEVELS

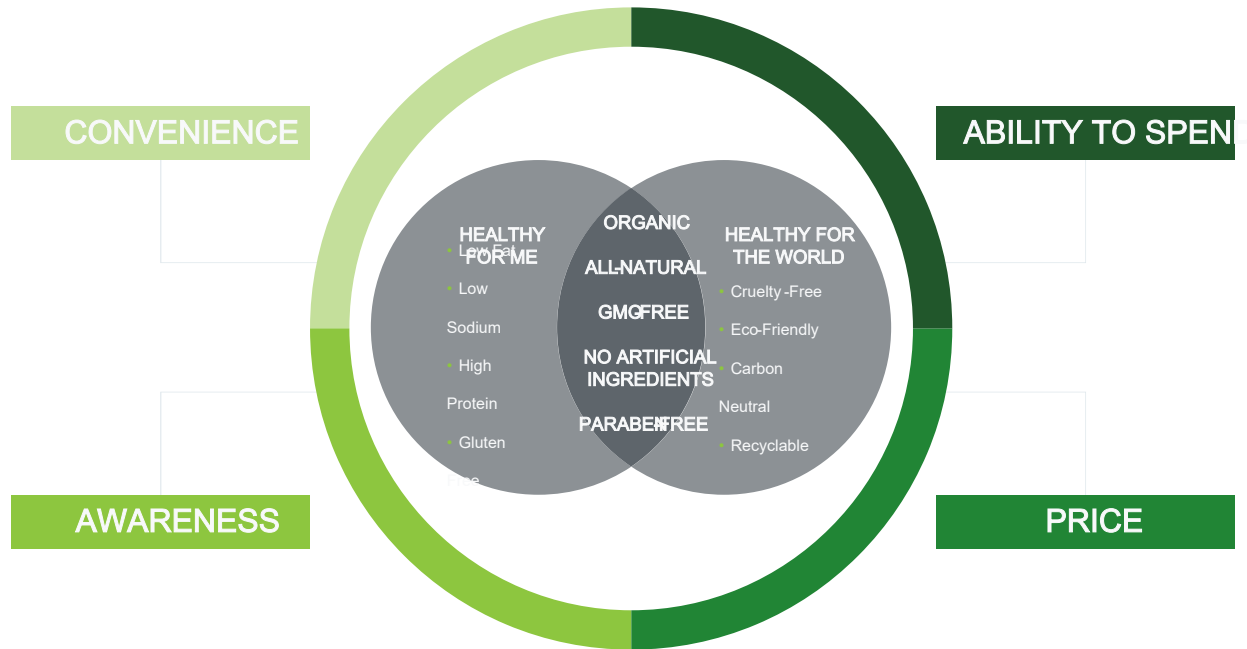


LEVERAGE SEAFOOD'S SEASONALITY TO ATTRACT CONSUMERS



STRATEGY: WHAT'S UNIQUE ABOUT YOUR BRAND

How can you help consumers live a Healthy For Me & Healthy For We lifestyle? What are the aspects across the sustainability spectrum that are most relevant for both your company and your consumers?



HEALTHY EATING TRENDS DRIVING GROWTH FOR SALMON & SHRIMP

Value Added Seafood Category Performance
Total U.S. xAOC Latest 52 weeks ending 02.23.19

Top 10 Categories in Value Added Seafood	Dollar Share	Dollar Growth
1. Salmon	34.3%	16.7%
2. Shrimp	28.2%	2.7%
3. Crab	17.8%	-2.6%
4. Lobsters	2.6%	-14.4%
5. Tilapia	1.8%	-22.0%
6. Other Fin Fish	1.8%	0.2%
7. Cod + Scrod	1.6%	-6.1%
8. Scallops	1.5%	0.9%
9. Catfish	1.5%	-16.3%
10. Haddock	1.0%	-5.5%

ACTION: UNDERSTAND WHAT RESONATES

Products with some type of social responsibility claim are up 8%, while total Food & Beverage is up only 2.6%

81%

OF GLOBAL RESPONDENTS

said that it is “extremely” or “very” important that companies implement programs to improve the environment

30%

OF CONSUMERS

are willing to pay a premium for products that deliver on social responsibility claims

FAIR TRADE +5%

Candy/gum/mints, desserts, diet & nutrition, baking staples

B CORPORATION +14%

Eggs, cheese driving growth

Baking staples, milk alternatives holding strong

ETHICAL +7%

Package coffee, eggs, beverages, cereal/granola

FAIR WAGES-4%

Only \$17.5M coming from a select few categories

ETHICAL CONSUMERISM DRIVING VALUE ADDED SALES AND POPULARITY

Value Add Seafood Performance
Total U.S. xAOC Latest 52 weeks ending 02.23.19

**VALUE ADD
SEAFOOD**
\$1,548M in annual
sales
+4.8% from YAGO

VALUE-ADDED SEAFOOD OPTIONS RESONATE AMONG CONSUMERS

COOKED
\$243M in annual sales
+8.1% from YAGO

SMOKED
\$156M in annual sales
+5.3% from YAGO

SALTED
\$11M in annual sales
+25.5% from YAGO

STRATEGY: CONSIDER YOUR ~~OWN~~ END SUPPLY CHAIN AND BUSINESS PROCESSES

Who do you need to engage, and what do you need to do, to bring sustainability into greater focus?



1 Reduce and/or reformulate packaging and ingredients



2 Revamp the supply chain and/or supplies



3 Diversify the product and/or vendor portfolio



4 Update and/or change existing business models



5 Integrate sustainability into consumer touchpoints and marketing

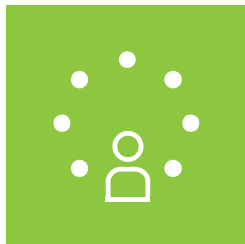
ACTION: SUSTAINABLE RESOURCE MANAGEMENT SHOULD BE A PART OF YOUR PROCESS



Source: Nielsen Product Insider, powered by Label Insight, Latest 52 weeks ended 3/9/19

STRATEGY: AUTHENTICATE YOUR EFFORTS

Road-test your new innovations and brand evolution with consumers by using real-time data and insights to direct your way forward.



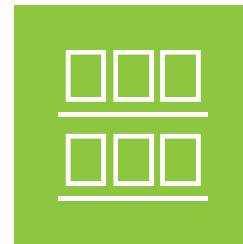
**BUILDING A
SUSTAINABILITY
STRATEGY**



**CORPORATE/
BRAND
MESSAGING**



**PRODUCT IDEAS/
SUSTAINABILITY
CLAIMS**



**PACKAGING AND
PORTFOLIO
OPTIMIZATION**