

Fish and Shellfish - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"After a year in which sales declined slightly, the market for fish and shellfish should improve – albeit slightly – over the next five years. The category's leading segment (fresh) remains strong and should continue to leverage healthy and natural attributes, while the other two segments (frozen and shelf-stable) will likely struggle."
- **William Roberts, Jr, Senior Food & Drink Analyst**

This report looks at the following areas:

- Sales stagnate in 2016, amid years of increases
- Flavor deterring some

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Fish and Shellfish - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Sales stagnate in 2016, amid years of increases

Figure 1: Total US sales and fan chart forecast of fish and shellfish, at current prices, 2012-22

Flavor deterring some

Figure 2: Reasons for purchase, September 2017

The opportunities

Suggestions could encourage purchase

Figure 3: Attitudes toward fish/shellfish preparation, any agree, by age, September 2017

Packaging improvement potential

Figure 4: Increasing purchase, September 2017

Hispanic Millennials may embrace affordable, sustainable options

Figure 5: Attitudes toward fish/shellfish, by Hispanic origin, September 2017

What it means

The Market – What You Need to Know

Sales slow, growth should resume

Frozen, shelf-stable face dim sales future, brighter prospects for fresh

Sales of competitive proteins fall

Regulators encourage fish consumption

Market Size and Forecast

Sales stagnate in 2016, amid years of increases

Figure 6: Total US sales and fan chart forecast of fish and shellfish, at current prices, 2012-22

Figure 7: Total US retail sales and forecast of fish and shellfish, at current prices, 2012-22

Market Breakdown

Fresh factoring significantly in fish favorites

Figure 8: Total US retail sales and forecast of fish and shellfish, by segment, at current prices, 2012-22

Market Perspective

Poultry preferences

Figure 9: Consumption frequency, September 2017

Figure 10: Changes in food price indexes, August 2015-16

Lower red meat sales

Figure 11: US city average price per lb of 100% ground beef, Jan 2010-Aug 2016

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fish and Shellfish - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Fake fish attempts to leverage interest in meat alternatives

Market Factors

Health concerns could lead to fish consumption

FDA, EPA fish consumption advice

Mislabeling reputation could impact entire category

Price-fixing scandal could negatively impact key shelf-stable brands

Key Players – What You Need to Know

Fresh flourishes in a largely stagnant category

Getting fresh

Shelf-stable struggles

Free-from claims gain environmental boost in fish/shellfish

Company and Brand Sales of Fish and Shellfish

Private label dominates market share, as StarKist merges health, flavor, and convenience

Sales of fish and shellfish by company

Figure 12: MULO sales of fish and shellfish, by leading companies, rolling 52 weeks 2016 and 2017

What's Working?

Fresher options fare well

Figure 13: Notable fresh fish introductions, 2017

Figure 14: Natural, convenient, environmentally friendly new fish/shellfish products, 2012-17

What's Struggling?

Declines among most shelf-stable brands, save for StarKist

Figure 15: Total US retail sales and forecast of shelf-stable fish and shellfish, at current prices, 2012-22

Figure 16: StarKist Kid's Creations Bacon Ranch Flavored Lightly Marinated Premium Chunk Light Tuna

What's Next?

Free-from claims merging with environmental awareness

Figure 17: Better-for-you, environmental claims on fish/shellfish introductions, 2016-17

Figure 18: Fish/shellfish launches with free-from and environmental claims, 2017

The Consumer – What You Need to Know

Taste draws most consumers

Taste turns some away

Vast majority buy fish at supermarkets

Avoiding hormones, antibiotics in fish/shellfish

Nutritional, developmental boost draws parental interest

Lures for fish/shellfish

Purchase

Fresh or frozen, fish remains most popular

Figure 19: Purchase of fish/shellfish, September 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fish and Shellfish - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Mass merchandisers, natural supermarkets, online resonating strongly with younger consumers

Figure 20: Purchase location, by age, September 2017

Figure 21: Purchase location – Online, by age, September 2017

Youngest consumers largely avoid category in grocery

Figure 22: Purchase of fish/shellfish, by age, September 2017

Hispanic Millennials more likely to opt for fresh fish and shellfish

Figure 23: Purchase of fish/shellfish, by Hispanic origin, September 2017

Purchase Reasons

Taste leads purchase factors, health attributes factor strongly

Figure 24: Reasons for purchase, September 2017

Taste resonating with older consumers in particular

Figure 25: Reasons for purchase, by age, September 2017

Health, ease of cooking factor differently by race

Figure 26: Reasons for purchase, by race, September 2017

Hispanic non-Millennials regard category as healthier than other proteins

Figure 27: Reasons for purchase, by Hispanic origin, September 2017

Taste resonates most strongly across all segments

Figure 28: Purchase of fish/shellfish, by reasons for purchase, August 2017

Reasons for Avoidance

Taste, aroma, price top reasons for avoiding fish/shellfish

Figure 29: Reasons for avoidance, September 2017

Taste, aroma deterring younger consumers; older consumers more likely to eat in restaurants

Figure 30: Reasons for avoidance, by age, September 2017

Purchase Location

Supermarkets remain the biggest fish/shellfish resource

Figure 31: Purchase location, September 2017

Parents more likely to buy fish at mass merchandisers, club stores

Figure 32: Purchase location, by number of children under 18 in household, September 2017

Important Attributes

Quality factors most strongly in both frozen and fresh choices

Figure 33: Important attributes of frozen options, September 2017

Figure 34: Important attributes of fresh options, September 2017

Attribute importance varies across age ranges

Figure 35: Important attributes of any fish/shellfish, by age, September 2017

Consumers seek to avoid hormones, antibiotics in fish/shellfish

Figure 36: Important free-from attributes of fish/shellfish, September 2017

Nutritional aspects resonating with Hispanic Millennials

Figure 37: Important attributes of any fish/shellfish, by Hispanic origin, September 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fish and Shellfish - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Improvement Opportunities

Packaging improvements could boost category

Figure 38: Improvement opportunities, September 2017

Flavor, health improvements could draw parents

Figure 39: Improvement opportunities, by number of children under 18 in household, September 2017

Packaging innovation potential in all segments

Figure 40: Purchase of fish/shellfish, by improvement opportunities, August 2017

Packaging improvements would resonate

Figure 41: TURF analysis – Improvement opportunities among all consumers, September 2017

Figure 42: TURF analysis – Improvement opportunities among fish/shellfish consumers, September 2017

Attitudes toward Preparation

Consumers confident in fish/shellfish preparation

Figure 43: Attitudes toward fish/shellfish preparation, September 2017

Suggestions could influence purchase

Figure 44: Attitudes toward fish/shellfish preparation, any agree, by age, September 2017

Hispanic Millennials express confidence in fish preparation

Figure 45: Attitudes toward fish/shellfish preparation, any agree, by Hispanic origin, September 2017

Attitudes toward Fish/Shellfish and Health

Consumers largely perceive fish as better-for-you

Figure 46: Attitudes toward fish/shellfish and health, September 2017

Fish's healthy attributes lost on younger consumers

Figure 47: Attitudes toward fish/shellfish and health, by age, September 2017

Parents' positive health regard for fish

Figure 48: Attitudes toward fish/shellfish and health, by number of children under 18 in household, September 2017

Hispanics and the health of fish/shellfish

Figure 49: Attitudes toward fish/shellfish and health, by Hispanic origin, September 2017

Increasing Usage of Fish/Shellfish

Lower price, sustainability could lure consumers to fish

Figure 50: Attitudes toward fish/shellfish, September 2017

Younger consumers seeking affordability, sustainability

Figure 51: Attitudes toward fish/shellfish, by age, September 2017

Price, sustainability would resonate with Hispanic Millennials

Figure 52: Attitudes toward fish/shellfish, by Hispanic origin, September 2017

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fish and Shellfish - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Direct marketing creative

Abbreviations and terms

Abbreviations

Appendix – The Market

Figure 53: Total US retail sales and forecast of fish and shellfish, at inflation-adjusted prices, 2012-22

Figure 54: Total US retail sales of fish and shellfish, by segment, at current prices, 2015 and 2017

Figure 55: Total US retail sales and forecast of fish and shellfish, by segment, at current prices, 2012-22

Figure 56: Total US retail sales and forecast of fresh fish and shellfish, at current prices, 2012-22

Figure 57: Total US retail sales and forecast of fresh fish and shellfish, at inflation-adjusted prices, 2012-22

Figure 58: Total US retail sales and forecast of frozen fish and shellfish, at current prices, 2012-22

Figure 59: Total US retail sales and forecast of frozen fish and shellfish, at inflation-adjusted prices, 2012-22

Figure 60: Total US retail sales and forecast of shelf-stable fish and shellfish, at current prices, 2012-22

Figure 61: Total US retail sales and forecast of shelf-stable fish and shellfish, at inflation-adjusted prices, 2012-22

Figure 62: Total US retail sales of fish and shellfish, by channel, at current prices, 2015 and 2017

Figure 63: US supermarket sales of fish and shellfish, at current prices, 2012-17

Figure 64: US sales of fish and shellfish through other retail channels, at current prices, 2012-17

Appendix – Key Players

Figure 65: MULO sales of fish and shellfish, by leading companies, rolling 52 weeks 2016 and 2017

Figure 66: MULO sales of fresh fish and shellfish, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 67: MULO sales of frozen fish and shellfish, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 68: MULO sales of shelf-stable fish and shellfish, by leading companies and brands, rolling 52 weeks 2016 and 2017

Appendix – The Consumer

Figure 69: Fresh/frozen fish/seafood usage, by gender, fall 2016

Figure 70: Fresh/frozen fish/seafood usage, by age, fall 2016

Figure 71: Fresh/frozen fish/seafood usage, by race, fall 2016

Figure 72: Fresh/frozen fish/seafood usage, by Hispanic origin, fall 2016

Figure 73: Fresh/frozen fish/seafood usage, by household income, fall 2016

Figure 74: Fresh/frozen fish/seafood usage, by education, fall 2016

Figure 75: Fresh/frozen fish/seafood usage, by size of household, fall 2016

Figure 76: Fresh/frozen fish/seafood usage, by parental status and number of children in household, fall 2016

Figure 77: Fresh/frozen fish/seafood usage, by region, fall 2016

Figure 78: Fresh/frozen fish/seafood usage, by gender and age, fall 2016

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com