

Fish and Shellfish - US - 2023

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This report looks at the following areas:

- Consumption of fish and shellfish by species and package format
- Restaurant consumption of fish and shellfish
- Purchase drivers for fish and shellfish
- Flavor interests by fish and shellfish species
- Attitudes toward fish and shellfish

Sales for fish and shellfish have struggled to keep pace with the considerable inflation seen in the past year. Yet consumers are interested in incorporating more fish and shellfish into their diet, a desire somewhat challenged by a perception of some of the products as being higher-priced proteins. Pricing strategies and incentives can offset pricey perceptions, as can messaging that reinforces the convenience and time-savings of value-added fish/shellfish options into an overall perception of value.

The entire category is heavily fragmented, not solely by brand but even among consumers themselves. Half of fish users ate three or more species, yet overall consumption is dominated by the familiar tuna and salmon among fish and by shrimp alone among shellfish. A tendency to limit consumption to special occasions coupled with a perception of the category as challenging to prepare are stifling consumption frequency. Brands can dilute these notions with simplification: meal planning tips, easy prep hacks and even prepared offerings that reduce the “work” put the category in the consideration set more frequently and more diversely.

Brands have taken initiative to meet the call for sustainability, yet the ubiquity of these claims may have become a confusing example of white noise, a given in the minds of consumers. Messaging simplification may be what helps brands get more mileage of their efforts. In a sea often dominated by private label offerings, sustainability is a premium driver, especially among younger adults.



“Fish and shellfish fans are conflicted: drawn to the health, taste and often premium experience the category represents, yet everyday occasions and frequency are challenged by limited perceptions of ease, versatility and predictably and price.”

– Billy Roberts, Sr. Analyst –
Food and Drink

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