

## Fish and Shellfish - US - July 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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



"Although fish and shellfish consumption per capita lags far behind meat and poultry (see Market Drivers), brands may be able to leverage consumers' expanding palates by targeting fish eaters with campaigns that encourage them to try different species that offer unique or exotic flavors, as nearly six in 10 buyers say they eat fish for the taste."

— Amy Kraushaar, US Category Manager, Food and Drink and Foodservice

This report looks at the following areas:

- How can fish/shellfish brands compete with meat/poultry brands?
- Can farm-raised fish increase their appeal?
- What do Millennials want from fish and shellfish brands?

US sales of fish and shellfish are forecast to grow slowly between 2015 and 2020, from \$16.7 billion to \$18.1 billion in current dollars. Sales are driven by perceptions that fish and shellfish are healthy alternatives to red meat and poultry. Millennials, Hispanics, Asians, and households with children are most likely to buy, especially fresh. Wild-caught is preferred over farm-raised, and fresh outsells frozen and shelf-stable, but frozen is forecast to grow faster between 2015 and 2020, likely because the quality of frozen has improved with flash freezing, and frozen products are typically more affordable than fresh.

**BUY THIS  
REPORT NOW**

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto: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 - July 2015

**Report Price:** £2466.89 | \$3995.00 | €3133.71

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

## Table of Contents

### Scope and Themes

What you need to know  
 Definition  
 Data sources  
 Sales data  
 Consumer survey data  
 Abbreviations and terms  
 Abbreviations

### Executive Summary

Overview  
 Slow growth forecast  
 Figure 1: Total US sales and fan chart forecast of fish and shellfish, at current prices, 2010-20  
 Key players  
 Figure 2: MULO sales of fish and shellfish, by rolling 52 weeks 2015  
 The consumer  
 High overall penetration but relatively low purchase frequency  
 Figure 3: Fish and shellfish purchases (any purchase), April 2015  
 Buyers select wild-caught, premium quality most  
 Figure 4: Types of fish and shellfish purchased, April 2015  
 Taste, health drive consumption  
 Figure 5: Reasons for eating fish and shellfish, April 2015  
 A third of buyers want to see more wild-caught  
 Figure 6: Product attributes buyers would like to see more of, April 2015  
 What we think

### Issues and Insights

How can fish/shellfish brands compete with meat/poultry brands?  
 Insight: Expanding palates and purchase frequency of fish eaters  
 Can farm-raised fish increase their appeal?  
 Insight: Sustainability, affordability, lack of toxins are positives for farm fish  
 What do Millennials want from fish and shellfish brands?  
 Insight: Flavor, premium quality, sustainability, fresh appeal to Millennials

### Market Size and Forecast

Key points  
 Sales and forecast of fish and shellfish  
 Figure 7: Total US retail sales and forecast of fish and shellfish, at current prices, 2010-20  
 Figure 8: Total US retail sales and forecast of fish and shellfish, at inflation-adjusted prices, 2010-20

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Fish and Shellfish - US - July 2015

**Report Price:** £2466.89 | \$3995.00 | €3133.71

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

## Fan chart forecast

Figure 9: Total US sales and fan chart forecast of fish and shellfish, at current prices, 2010-20

## Fan chart methodology

## Market Drivers

### Key points

Meat consumption rates do not favor fish/shellfish

Figure 10: Per capita and projected per capita consumption of poultry and livestock, 2006-24

Millennials most apt to purchase fish/shellfish

Millennials represent most populous generation, grow 2.6% in 2015-20

Figure 11: Population by generation, 2010-20

Hispanics, Asians most likely to buy

Hispanic and Asian populations grow fastest in 2010-20

Figure 12: Share of total US population by race/Hispanic origin, 2010-20

## Segment Performance

### Key points

Fresh fish dominates among segments

Sales of fish and shellfish, by segment

Figure 13: Total US retail sales of fish and shellfish, by segment, at current prices, 2013 and 2015

Sales and forecast of fresh fish and shellfish

Figure 14: Total US retail sales and forecast of fresh fish and shellfish, at current prices, 2010-20

Sales and forecast of frozen fish and shellfish

Figure 15: Total US retail sales and forecast of frozen fish and shellfish, at current prices, 2010-20

Sales and forecast of shelf-stable fish and shellfish

Figure 16: Total US retail sales and forecast of shelf-stable fish and shellfish, at current prices, 2009-19

## Retail Channels

### Key points

Supermarkets make up 26.5%, but other channels grow sales more

Sales of fish and shellfish, by channel

Figure 17: Total US retail sales of fish and shellfish, by channel, 2013 and 2015

Supermarket sales small but steady

Mass merchandisers offer value, commit to sustainability

Figure 18: Retail channel sales of fish and shellfish, 2010-15

Natural channel sales of fish and shellfish

Figure 19: Natural channel sales of fish and shellfish, by segment, at current prices, rolling 52 weeks ending April 21, 2013 and April 19, 2015

Figure 20: Natural supermarket sales of frozen and refrigerated fish and shellfish, by share of sales, at current prices, rolling 52 weeks ending Apr 21, 2013 and Apr 19, 2015

Figure 21: Natural supermarket sales of frozen and refrigerated fish and shellfish, by type, at current prices, rolling 52 weeks ending 4/21/13 and 4/19/15

## Leading Companies

### Key points

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Fish and Shellfish - US - July 2015

**Report Price:** £2466.89 | \$3995.00 | €3133.71

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

MULO sales dominated by shelf-stable manufacturers

MULO sales of fish and shellfish

Figure 22: MULO sales of fish and shellfish, by rolling 52 weeks 2014 and 2015

MULO sales of frozen fish and shellfish

Figure 23: Gorton's Smart and Crunchy television ad, 2015

Figure 24: MULO sales of frozen fish and shellfish, 2014 and 2015

MULO sales of shelf-stable fish and shellfish

Figure 25: StarKist Tuna Creations television ad, 2015

Figure 26: MULO sales of shelf-stable fish and shellfish, 2014 and 2015

MULO sales of fresh fish and shellfish

Figure 27: MULO sales of fresh fish and shellfish, 2014 and 2015

## Innovations and Innovators

Environmentally friendly claims increase, reflecting demand

Figure 28: Top 10 fish and shellfish product claims, by percentage of total claims, 2010-14

Sustainable brands likely to attract a growing number of buyers

All-natural, preservative-free gains popularity

Premium products appeal to consumer taste for quality

## Fish and Shellfish Purchases

Key points

High penetration, but half or less buy once a month or more

Figure 29: Fish and shellfish purchases, April 2015

Men more likely than women to buy

Figure 30: Fish and shellfish purchases, by gender, April 2015

Health reasons very likely to motivate purchases of all fish/shellfish types

Figure 31: Fish and shellfish purchases (once a month or more), by reasons for eating fish and shellfish, April 2015

Figure 32: Fish and shellfish purchases (once a month or more), by reasons for eating fish and shellfish, April 2015

Figure 33: Fish and shellfish purchases (once a month or more), by reasons for eating fish and shellfish, April 2015

Packaging, flavor, catch method are important

Figure 34: Fish and shellfish purchases (once a month or more), by product attributes buyers would like to see more of, April 2015

Figure 35: Fish and shellfish purchases (once a month or more), by product attributes buyers would like to see more of, April 2015

Figure 36: Fish and shellfish purchases (once a month or more), by product attributes buyers would like to see more of, April 2015

## Fish and Shellfish Home Consumption Frequency

Key points

Most eat fresh, frozen, shelf-stable fish 2-3 times per month

Figure 37: Fish and shellfish home consumption frequency, April 2015

## Types of Fish and Shellfish Purchased

Key points

Wild-caught, premium quality purchased most

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Fish and Shellfish - US - July 2015

**Report Price:** £2466.89 | \$3995.00 | €3133.71

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

Figure 38: Types of fish and shellfish purchased, April 2015

Figure 39: Types of fish purchased, by Millennials versus Non-Millennials, April 2015

## Fish and Shellfish Purchase Locations

### Key points

#### Majority buy at supermarkets

Figure 40: Where fish and shellfish is purchased, April 2015

#### Millennials most likely to use stores other than supermarkets

Figure 41: Where fish and shellfish is purchased, by Millennials versus Non-Millennials, April 2015

#### Traditional channels may need to better promote wild-caught, premium

Figure 42: Types of fish and shellfish purchased, by where fish and shellfish is purchased, April 2015

Figure 43: Types of fish and shellfish purchased, by where fish and shellfish is purchased, April 2015

## Reasons for Eating Fish and Shellfish

### Key points

#### Flavor, health drive sales

Figure 44: Reasons for eating fish and shellfish, April 2015

#### Millennials, family households cite freshness, premium quality as reasons to buy

Figure 45: Reasons for eating fish and shellfish, by Millennials versus non-Millennials, April 2015

Figure 46: Reasons for eating fish and shellfish, by presence of children, April 2015

#### Buyers equate wild-caught, sustainable products with flavor

Figure 47: Reasons for eating fish and shellfish, by product attributes buyers would like to see more of, April 2015

Figure 48: Reasons for eating fish and shellfish, by product attributes buyers would like to see more of, April 2015

Figure 49: Reasons for eating fish and shellfish, by product attributes buyers would like to see more of, April 2015

## Reasons for Not Eating Certain Types of Fish and Shellfish

### Key points

#### More than three in 10 do not eat because they don't like the taste

Figure 50: Reasons for not eating certain types of fish and shellfish, April 2015

## Attributes Buyers Would Like More Of

### Key points

#### Wild-caught tops list of attributes buyers would like to see

Figure 51: Product attributes buyers would like to see more of, April 2015

#### Millennials more interested in American farmed and sustainable products

Figure 52: Product attributes buyers would like to see more of, by generations, April 2015

Figure 53: Product attributes buyers would like to see more of, by generations, April 2015

Figure 54: Product attributes buyers would like to see more of, by generations, April 2015

#### Households with kids want more family-size, convenience, flavor variety

Figure 55: Product attributes buyers would like to see more of, by presence of children, April 2015

## CHAID Analysis

### Methodology

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Fish and Shellfish - US - July 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Affluent, urban men with kids are ideal target for fresh fish

Figure 56: Frequent (twice or more a month) home consumption – CHAID – Tree output, April 2015

55+ buyers who eat fish/shellfish at least twice a month choosing it over poultry, beef

Figure 57: Reasons for eating fish and shellfish– CHAID – Tree output, April 2015

### Appendix – Other Useful Consumer Tables

#### CHAID Data

Figure 58: Frequent (twice or more a month) home consumption – CHAID – Table output, April 2015

Figure 59: Reasons for eating fish and shellfish – CHAID – Table output, April 2015

#### Experian Simmons

Figure 60: Household usage of meat, fish, and poultry, last six months, February 2009/March 2010-January 2013/March 2014

Figure 61: Household consumption of frozen prepared seafood and fish, November 2013-December 2014

Figure 62: Kinds of frozen prepared seafood and fish consumed in household, November 2013-December 2014

Figure 63: Brands of frozen prepared seafood and fish consumed in household, November 2013-December 2014

Figure 64: Brands of frozen prepared seafood and fish consumed in household, November 2013-December 2014

Figure 65: Household consumption of canned or pouched tuna, November 2013-December 2014

Figure 66: Kinds of frozen prepared seafood and fish consumed in household, November 2013-December 2014

Figure 67: Styles of frozen prepared seafood and fish consumed in household, November 2013-December 2014

Figure 68: Styles of frozen prepared seafood and fish consumed in household, November 2013-December 2014

Figure 69: Forms of frozen prepared seafood and fish consumed in household, November 2013-December 2014

Figure 70: Brands of frozen prepared seafood and fish consumed in household, November 2013-December 2014

Figure 71: Brands of frozen prepared seafood and fish consumed in household, November 2013-December 2014

Figure 72: Teen consumption of canned tuna, November 2013-December 2014

Figure 73: Number of times teens eat canned tuna in last 30 days, November 2013-December 2014

Figure 74: Kids consumption of canned tuna, November 2-13-December 2-14

### Appendix – Trade Associations

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)