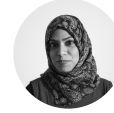
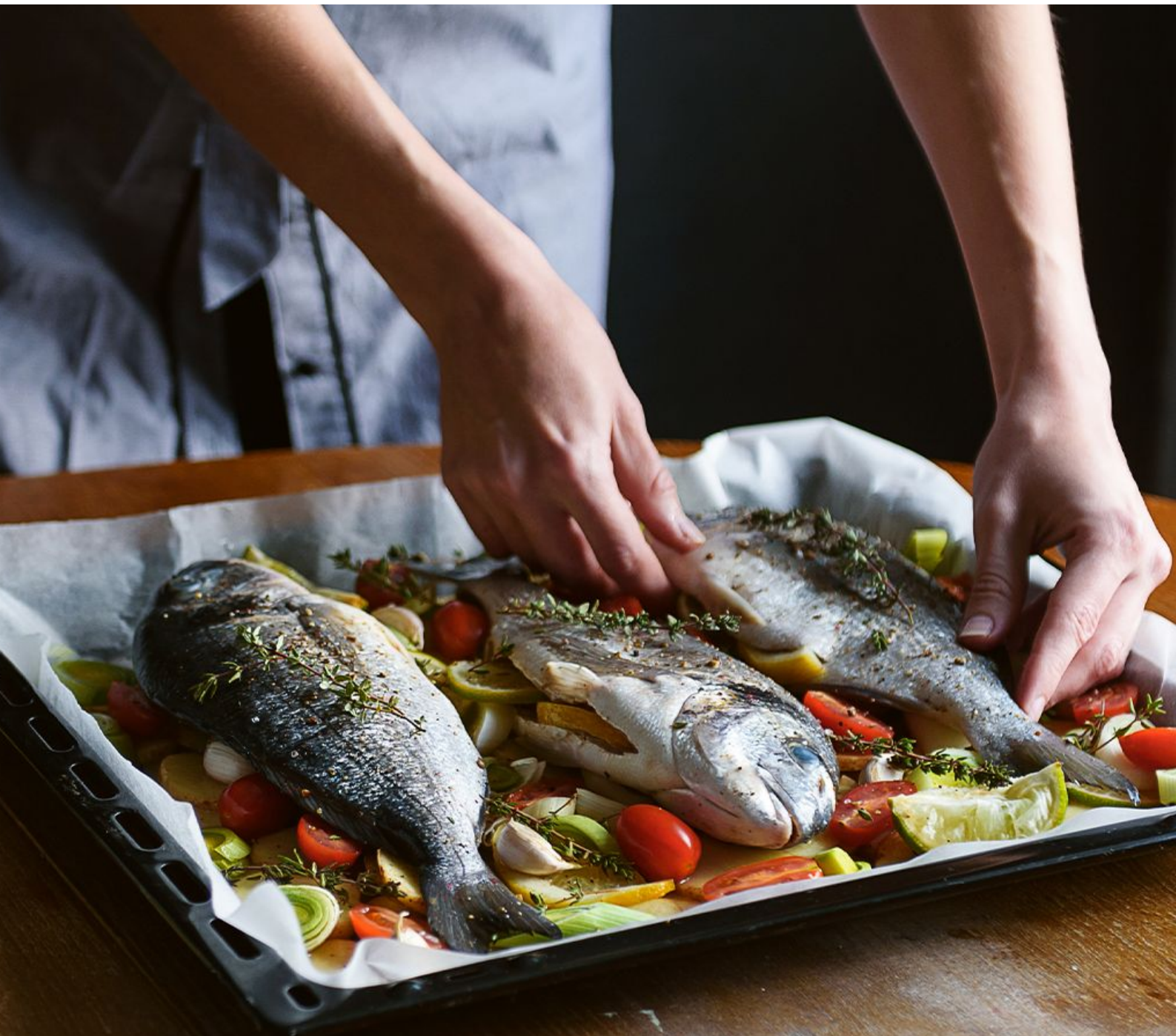


A YEAR OF INNOVATION IN FISH & FISH SUBSTITUTES, 2022

Fish substitute launches continue to emerge, and are increasingly vocal about their environmental and nutritional benefits.



Amrin Walji, Senior
Innovation Analyst



Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Europe: fish producers bring meal inspiration to home cooks

- Consumers are keen to try recipes in which fish replaces meat
- Fillet and whole formats are the most common among fish launches in Europe
 - Graph 1: processed fish launches, by share of format type, 2018-22
- Fish product launches explain how they can be used as a replacement for meat

Europe: environmental claims grow among fish substitute launches

- Environmental concerns drive interest in fish substitutes
- Ethical and environmental claims grow among fish substitute launches in Europe
- Fish substitute products position themselves as a sustainable solution to the challenges appearing in the seafood industry

The Middle East & Africa (MEA)

- Shelf-stable formats dominate innovation in MEA

ASIA PACIFIC (APAC)

Asia: inflationary pressures will encourage consumers to look for lower-cost options

- Shelf-stable fish can appeal as a lower-cost and portable alternative
- Shelf-stable fish products see an uptick in launches
 - Graph 2: processed fish launches, by share of storage type, 2018-22
- Shelf-stable fish products target different consumption occasions

Asia: innovation in fish substitutes targets consumers' nutritional needs

- Chinese consumers would like to see more meat-free options
- Fish substitute products see a decline in launch activity
 - Graph 3: fish product launches, by share of top three ethical/environmental claims, 2018-22
- Protein and fibre claims take centre stage in fish substitutes

Australia & New Zealand

- Fish producers explain their responsible fishing strategies

THE AMERICAS

North America: sustainable claims rise in fish and shellfish launches

- Consumers want to be assured that the fish they buy is responsibly sourced
- Sustainable and environmental claims rise among fish launches over the last year
 - Graph 4: processed fish launches, by share of select ethical and environmental claims, 2018-22
- Seafood brands place a strong emphasis on sustainability claims
- Brand renovation/innovation: BY2048 launches carrot-based smoked salmon alternative

North America: brands go deeper into the snacking territory

- Consumers love to snack, and have an open mind about what constitutes a snack
- Fish producers tap into the snacking occasion

Latin America: promoting sustainable and better-for-you attributes in fish

- Consumers already perceive fish as a healthy protein source
 - Graph 5: processed fish launches, by share of select claims, 2019-22
- Brands highlight the sustainable and nutritional credentials of fish

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