

# A YEAR OF INNOVATION IN FISH PRODUCTS, 2023

Innovation is mainly focused around convenience and authentic flavours, like beechwood smoke. Also, producers are flagging up the inherent nutrient content of fish.



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# 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: launches of canned fillet fish record a surge in launch activity

- Consumers reappraise the value credentials of canned food
- Tray packaging declines as canned formats rise among fish fillet launches
  - Graph 1: fish fillet product launches, by share of top five package types, 2018-23
- Innovations in canned filleted fish strive to elevate value-for-money appeal

### Europe: the share of beechwood-smoked flavours rises among sliced fish launches

- Consumers are not dining out as often but still want authentic flavours
- Among sliced fish launches, beechwood-smoked flavours continue to gain share
  - Graph 2: sliced fish launches, by top five flavour components, 2018-23
- Sliced fish producers elevate their artisanal appeal by providing details about the smoking process

## The Middle East & Africa (MEA)

- Fish product launches in MEA offer added value features around texture, flavour and nutrition

## ASIA PACIFIC (APAC)

### Asia: convenient formats of fish record a rise in launch activity

- Busy consumers are keen to see simple yet wholesome processed fish-based meals
- Convenience-based formats gain a bigger share of launch activity
  - Graph 3: launches of fish products, by leading sub-category, 2018-23
- Processed fish innovation dials up convenience credentials

### Asia: high/added protein claims attract a rising share of activity

- Nutrient-boosted and protein-rich foods grab the attention of health-aware Asians
- High/added protein claims remain niche among Asian fish product launches but are growing
  - Graph 4: fish product launches, by share of high/added protein and vitamin/mineral fortified claims, 2018-23
- High protein content is celebrated in Asian fish product launches

## Australia & New Zealand: native seafood species take a starring role in innovation

- Not just barramundi: seafood that is typical to the oceans of ANZ hits retail

## THE AMERICAS

### **North America: fish product launches with high/added protein claims record an uplift**

- Consumers want reassurance about the nutrient quality of fish/shellfish and how ethically it is sourced
- Added/high protein claims record a rise among fish product launches in North America
  - Graph 5: total fish/shellfish product launches, by select claim, 2018-23
- Fish launches flag up next level ethical and nutritional credentials
- Brand renovation/innovation: Scout embraces on-the-go convenience with an exotic range that delivers a crunchy quality

### **North America: launches with salmon ingredients record a small but notable rise in activity**

- Risk-averse US consumers generally stick to familiar types of fish and shellfish
- Shrimp accounts for the large minority of category launches, but salmon's share leaps in a small but notable way
  - Graph 6: North America, total fish product launches, by share of leading fish/shellfish ingredient type, 2018-23
- Innovation in salmon explores exciting, yet uncomplicated, approaches to sourcing and flavouring
- A round-up of recent plant-based fish/shellfish launches in North America

### **Latin America: frozen formats record a surge in launch activity as consumers regard frozen food more positively**

- Frozen formats of fish product launches continue to grab a bigger share of launch activity
  - Graph 7: fish product launches, by share of storage format, 2018-23
- Frozen fish product launches in Latin America target convenient yet gourmet meal time occasions

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