

FISH AND SHELLFISH – GERMANY – 2022

Seafood's healthier image and consumer openness to swapping meat for fish and shellfish provide opportunities for future retail sales.



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Fish And Shellfish – Germany – 2022

This report looks at the following areas:

- The impact of COVID-19 and rising inflation on the fish and shellfish market in Germany
- Consumers' fish and shellfish usage, including which species of fish and seafood are most popular
- Barriers to eating more fish and shellfish, including price, ease of preparation, smell and taste
- Attitudes towards and behaviours related to fish and shellfish, including sustainability
- How launch activity reflects consumer demand, especially for ethical and environmentally friendly products



Seafood's healthier image and consumer openness to swapping meat for fish and shellfish provide opportunities for future retail sales.

Overview

70% of Germans have been affected by increases in food and drink prices over the last two months to April 2022. As inflation is currently high, with experts predicting a further increase over the coming months, and consumers' incomes being squeezed, we can foresee **private label fish and shellfish brands gaining further share of NPD** in the near future.

The **increased prioritisation of health** due to the pandemic has reinforced one of the key drivers of the already powerful meat reduction trend – and fish/shellfish are benefitting from this trend as well. **28% of fish/shellfish eaters/buyers** have swapped meat products for fish due to health considerations and there is strong potential for brands that have a compelling image of healthiness.

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52% of German fish/shellfish eaters/buyers would be interested in fish/shellfish meal kits. Offering meal kits is a great way to simplify preparation by providing step-by-step instructions, and they are useful as a way to increase confidence in cooking.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for fish and shellfish

Market context

- Rising costs affecting all German consumers
- Fish/shellfish sales fall back as COVID-19 boost declines
- Fish and shellfish on menu for nine in 10 people
 - Graph 1: eating behaviour of fish/shellfish, 2021

Mintel predicts

- Market size & forecast
- Fish and shellfish value sales projected to increase, whereas volume sales decrease
- Volume sales of fish and shellfish forecast to decrease by 12% over 2021-26
- Fish and shellfish sales expected to drop in terms of volume

Opportunities

- Provide more guidance on sustainability of fish and shellfish
- Sustainability is highly important for German fish and shellfish consumers
- Offer a variety of fish and shellfish alternatives
- Promote speedy and convenient fish/shellfish recipes
- Innovate more around meal kits using fish and shellfish

The competitive landscape

- Private label maintains the majority share of fish and shellfish sales
 - Graph 2: brands' retail shares of fish and shellfish sales, by value and volume, 2021
- Quick download resources

MARKET DRIVERS

- German economy hit hard by COVID-19 disruptions
- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 3: key economic data, in real terms, 2019-23
- Rising inflation squeezes household incomes
- Consumers have a greater awareness of planetary health

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- Rising concern about sea fishing due to media coverage
- Obesity remains a major public health challenge in Germany...
- ... and the fish category can benefit from an increased focus on health and wellbeing
- Nutri-Score will ensure more nutritional transparency and informed decision making

WHAT CONSUMERS WANT AND WHY

Usage of fish and shellfish

- Fish and shellfish on menu for nine in 10 people
 - Graph 4: eating behaviour of fish/shellfish, 2021
- Fish is consumed relatively infrequently
 - Graph 5: frequency of eating fish, by storage type, 2021
- Salmon is the most popular type of fish eaten across all ages
 - Graph 6: types of fish eaten, 2021
- Over a third of Germans eat just two types of fish
 - Graph 7: repertoire of types of fish eaten, by age, 2021
- Shellfish eating is also quite infrequent
 - Graph 8: frequency of eating shellfish, by storage type, 2021
- Prawns are the most popular type of shellfish eaten across all ages
 - Graph 9: types of shellfish eaten, 2021
- Over half of Germans eat just two types of shellfish
 - Graph 10: repertoire of types of shellfish eaten, by age, 2021

Concepts of interest in fish and shellfish

- Sustainable sourcing and native German species have highest appeal
 - Graph 11: concepts of interest in fish and shellfish, 2021
- Sustainably sourced fish/shellfish has the greatest appeal
- Full transparency on pack: explaining fishing method/area and fishing gear
- More guidance needed on sustainability of fish and shellfish types
- Track your fish: Providing traceability through on pack codes
- WWF Fish Guide app supports consumers in making sustainable fish/shellfish choices
- Interest in foods made from native German species
- Considerable interest in speedy cooking solutions
- Tap into convenient and snackable fish and shellfish products

Behaviours related to fish and shellfish

- Sustainability is high on consumers' agendas
 - Graph 12: behaviours related to fish and shellfish, 2021
- More than half are interested in recipes using fish as an alternative to meat

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- Fish can replace typical meat formats
- Innovate more meal kits using fish and shellfish
- Tailor fish/shellfish meal kits to male cooks as an alternative to red meat/poultry
- International inspiration: meal kits with fish

Attitudes towards Fish and Shellfish

- Sustainability is still the priority, but consumers seem undecided if fish is more eco-friendly than meat
 - Graph 13: attitudes towards fish and shellfish, 2021
- Innovation in plant-based fish substitutes warrants attention
- Position fish alternatives as a way to protect the seas and underline environmental benefits
- International inspiration: no fishy business with Hooked
- More launches seen in fish and seafood alternatives
- Address the perceived lack of health benefits of plant-based fish and shellfish
- Boost the health halo of fish with healthy extras
- Make the speed and convenience of canned fish appealing for at-home lunch

Barriers to eating fish and shellfish

- Price is the biggest barrier to eating more fish
 - Graph 14: barriers to eating fish and shellfish, 2021
- Cost remains key barrier to eating fish/shellfish
- Addressing inherent characteristics of fish to appeal to more consumers
- International inspiration: South Korean brand develops a low-odour solution for children

LAUNCH ACTIVITY AND INNOVATION

- Frozen fish/shellfish products have the highest NPD
 - Graph 15: fish products NPD by storage type, 2017 vs 2021
- Private labels take overall lead in NPD activity
 - Graph 16: fish products NPD by company, 2017-21
- Own-label expands usage occasions of fish to barbecues
- Nutri-Score is designed to foster healthier eating choices
- High/added protein claims take off in 2021
- Functional claims are rare in fish/shellfish NPD
- Scope for more flavour innovation for fish NPD
 - Graph 17: fish products NPD by flavour component, 2017 vs 2021
- Ethical and environmental claims grow strongly among fish/shellfish launches
 - Graph 18: fish products NPD with ethical claims, 2017 vs 2021
- Environmentally friendly products are often linked to MSC or ASC certification
- Addressing concerns: Lidl introduces new packaging made from ocean-bound plastic

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- Fish and shellfish brands respond to consumer interest in organic products
- Plant-based fish/seafood substitute launches are increasing
 - Graph 19: meat substitutes NPD with 'fish' flavour, 2018-21

Advertising and marketing activity

- Fish fingers and pizza – a dream come true with Dr. Oetker
- COSTA collaborates with influencers on social media
- Don't be a seabass

MARKET SHARE

- Private labels take the majority market share of fish and shellfish sales

Retail market share of fish and shellfish, by value, 2020-21

- Private label strongest followed by Iglo

Retail market share of fish and shellfish, by volume, 2020-21

- Private label strongest followed by Iglo

MARKET SIZE, SEGMENTATION AND FORECAST

- Focus on sustainability and health halo for sales growth
- Fish and shellfish value sales projected to increase by 6% over 2021-26
- Volume sales of fish and shellfish forecast to decrease by 12% over 2021-26

Retail sales of fish and shellfish, by segment, 2020-21

- Chilled dominates fish and shellfish sales, however all segments lost sales in 2021

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- CHAID Analysis
- Tailor fish/shellfish meal kits as an alternative to red meat/poultry, targeting male consumers
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Market size and forecast – fish and shellfish – value

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- Market size and forecast – fish and shellfish – volume
- Market forecast and prediction intervals – fish and shellfish – value
- Market forecast and prediction intervals – fish and shellfish – volume

Appendix – company market shares

- Company retail market share of fish and shellfish, by value, 2020-21
- Company retail market share of fish and shellfish, by volume, 2020-21

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