

An aerial night view of a city, likely Shanghai, with a dense grid of buildings and a river. Overlaid on the image are several glowing white arcs and dots, resembling a network or data visualization. The sky is dark blue with some clouds and a few bright stars or lights.

# Traditional Products – Innovation Landscape Shelf-stable fish & seafood

# Methodology

## ANALYSIS & PARAMETERS

- Analysis is performed based on new product launches tracked on the Innova Database.
- Geography: Europe.
- Time Frame: 2014 – 2018.
- Category: Meat, Fish & Eggs
  - Subcategories: Fish & Seafood
  - Shelving: Ambient
- Positioning: free text search for products with “Protected designation of origin”, “Protected geographical indication”, “Traditional specialties guaranteed”, “Product of Canary Islands”, “Mountain Product” and “Product of Island Farming”.

## ABBREVIATIONS AND NOTES

- CAGR = Compound Annual Growth Rate
- F&B = Food & Beverage
- NPL = New Product Launches
- PDO = Protected designation of origin
- PGI = Protected geographical indication
- TSG = Traditional specialties guaranteed
- Number of respondents of Consumer Survey: **500 per analyzed country.**
- Shelf-stable = ambient shelving
- Traditional/origin seal = products with PGI, PDO, TSG, Mountain Product, Product of Canary Islands and Product of Island Farming seal.
- Traditional positioning = products with “traditional” positioning at Innova Database.

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# Overview of Trends in Shelf-Stable Fish & Seafood - Europe



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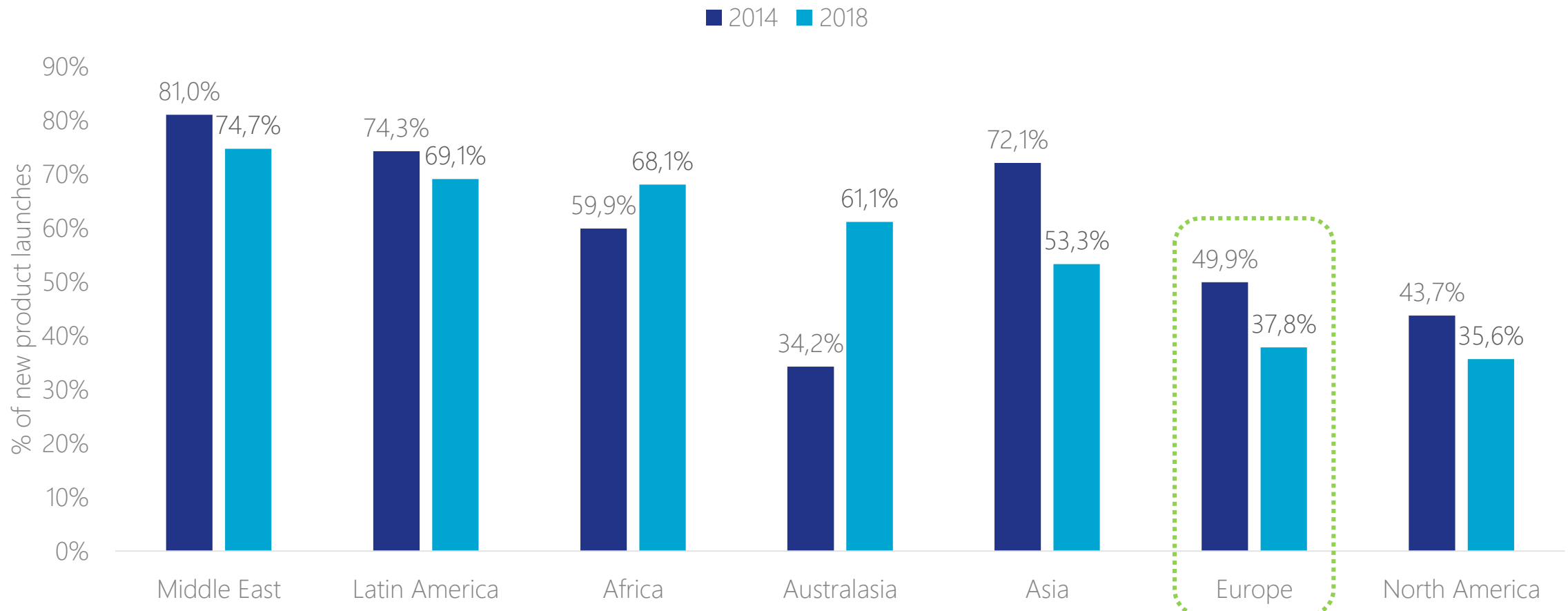


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# Shelf-stable fish & seafood presence decreasing in Europe

- Shelf-stable fish & seafood presence has decreased in Europe from 49.9% in 2014 to 37.8% of all fish & seafood product launches tracked, while Middle East has the strongest presence and Australasia is the fastest growing region.

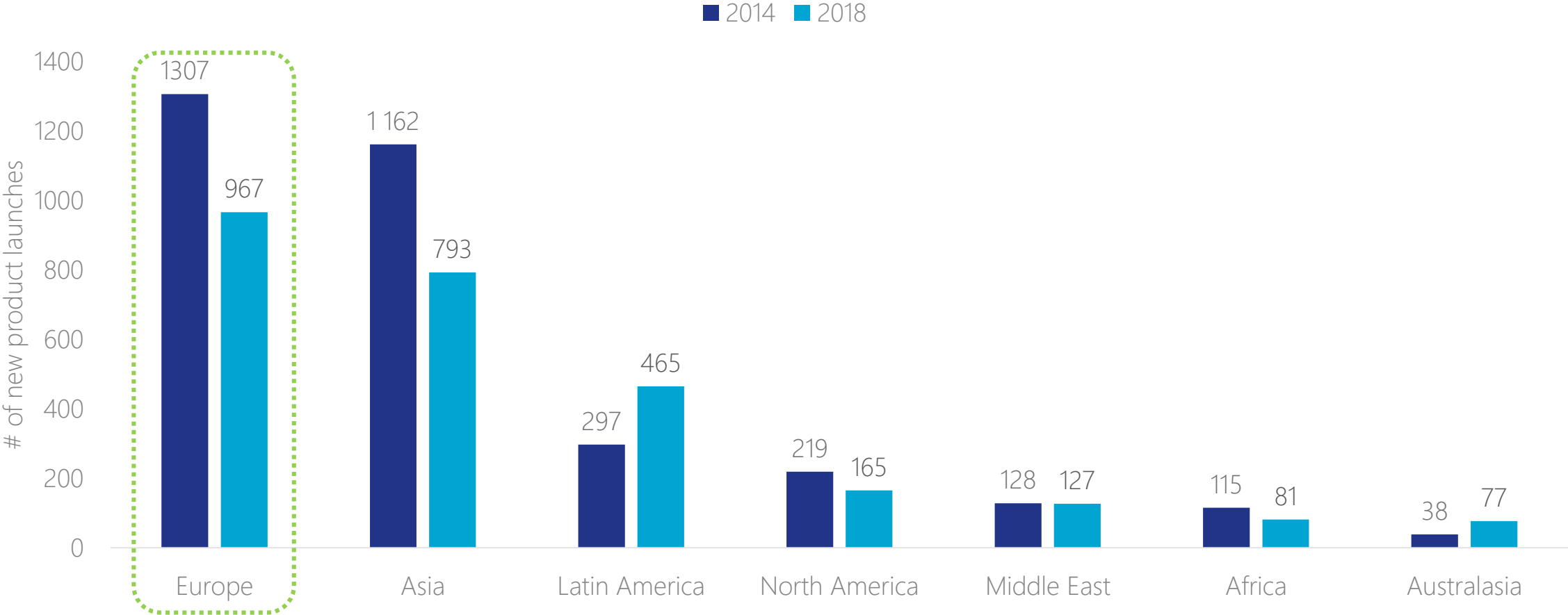
Shelf-stable fish & seafood as percentage (%) of fish & seafood new product launches tracked per region (2018 vs. 2014)



# Europe leads shelf-stable fish & seafood new product launches

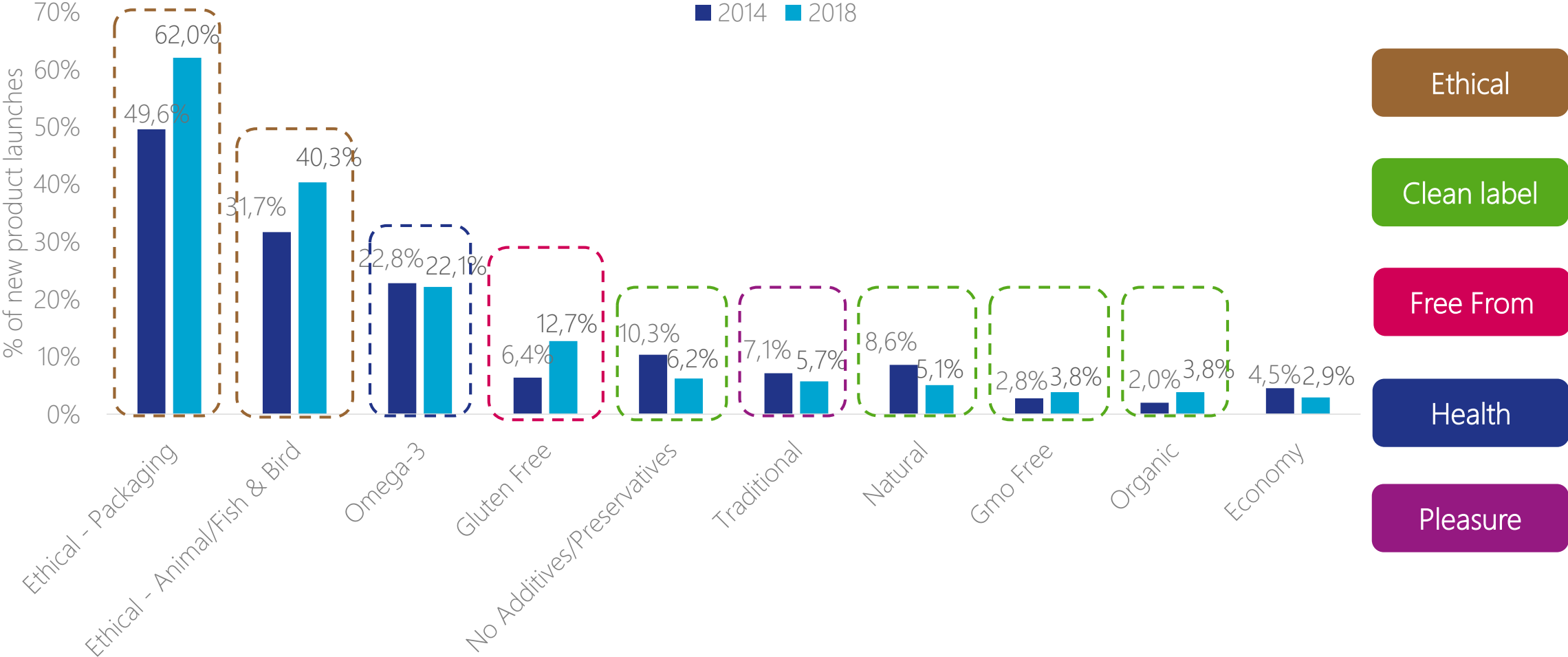
- Although shelf-stable fish & seafood product launches activity is decreasing, Europe still leads this segment.

Number of shelf-stable fish & seafood new product launches tracked per region (2018 vs. 2014)



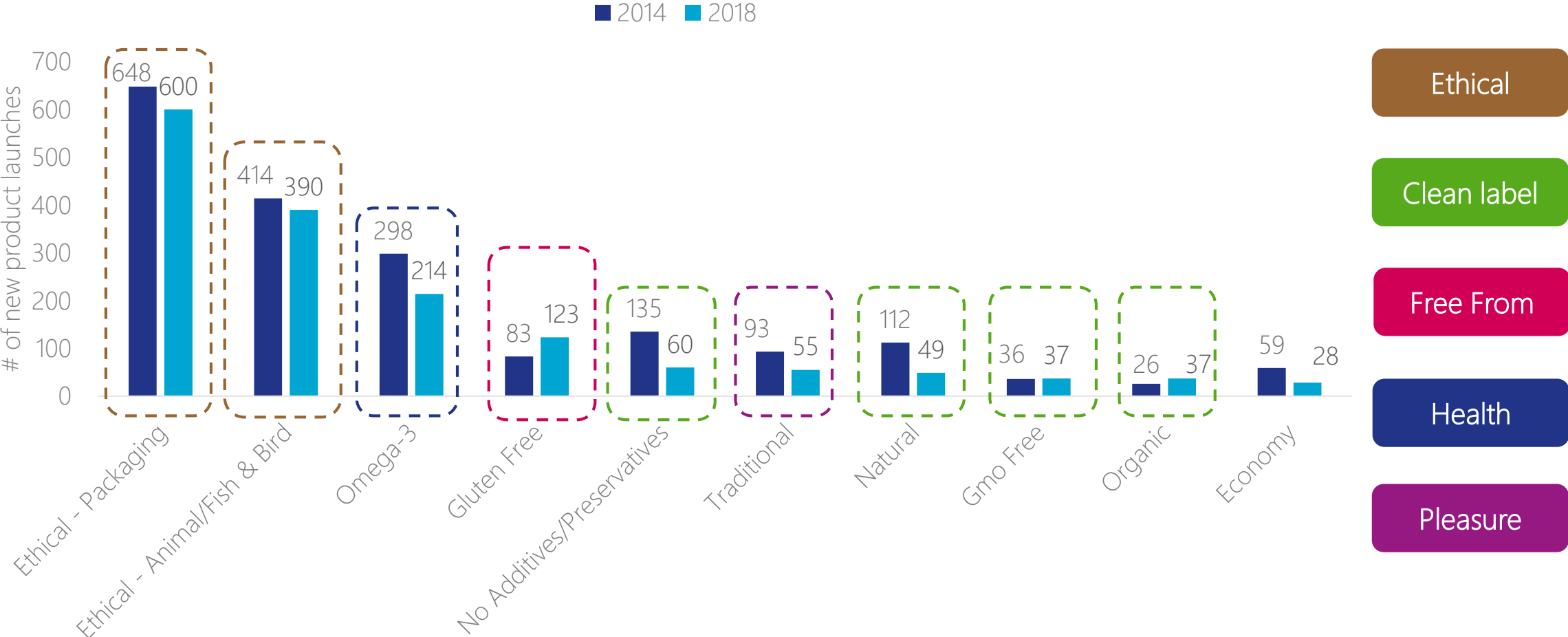
# Ethics and health lead in shelf-stable fish & seafood positionings in Europe

Top positionings as percentage (%) of shelf-stable fish & seafood new product launches tracked (Europe, 2018 vs. 2014)



# Ethics and health lead in shelf-stable fish & seafood positionings in Europe

Number of number of shelf-stable fish & seafood new product launches tracked per positioning (Europe, 2018 vs. 2014)

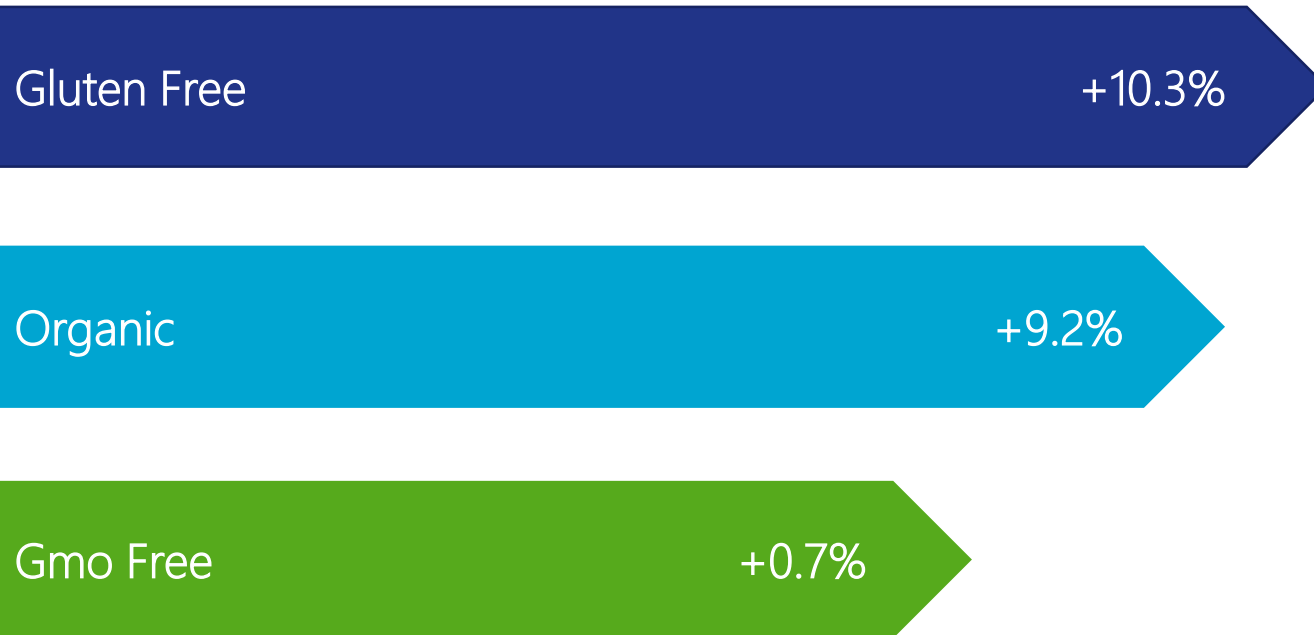




# Free from claims are fastest growing in European fish & seafood

Fastest growing top positionings as an average annual growth rate (%) in new shelf-stable fish & seafood product launches tracked (Europe, CAGR 2014-2018)

CAGR ('14-'18)



**Isabel Albondigas De Atun Con Tomate: Tuna Meatballs With Tomato**

Spain, Apr 2019

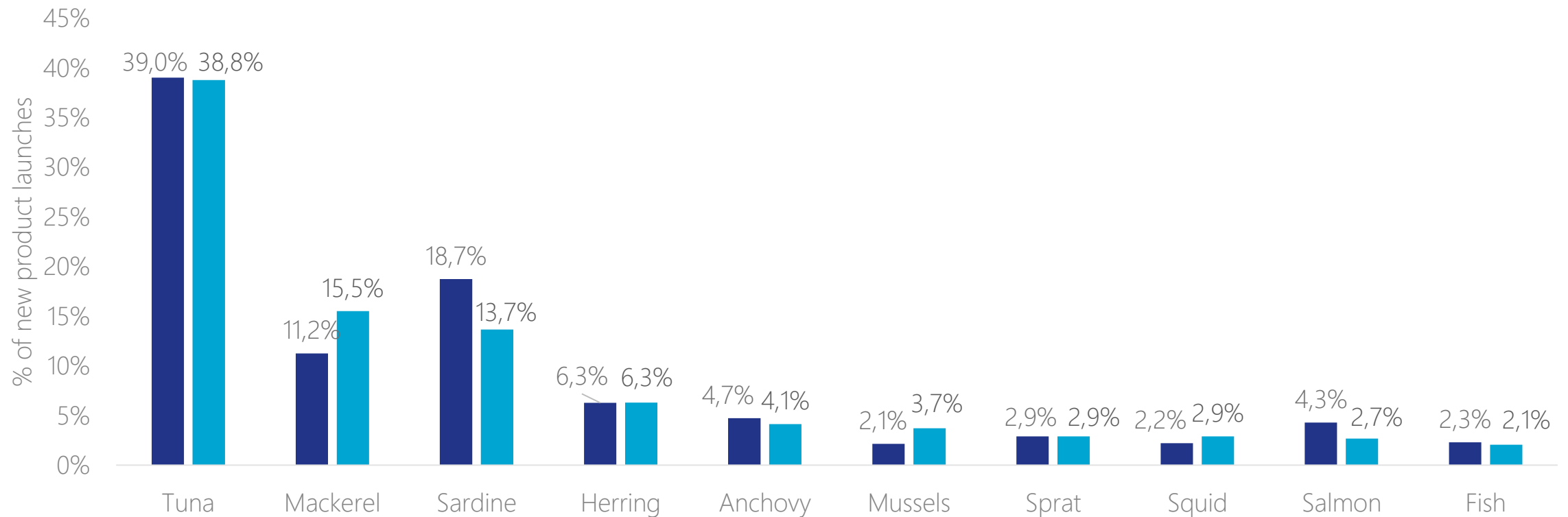
CLAIMS Ready in 1 minute. Natural source of vitamins, omega 3, EPA and DHA. Dolphin safe. **Gluten free**. Lactose free. The funniest and fastest way to give fish to children. Green Dot Certified.

# Mackerel and mussels with highest growth in the last five years

- Traditional species such as tuna and sardine are giving place to other products such less conventional mackerel and mussels.

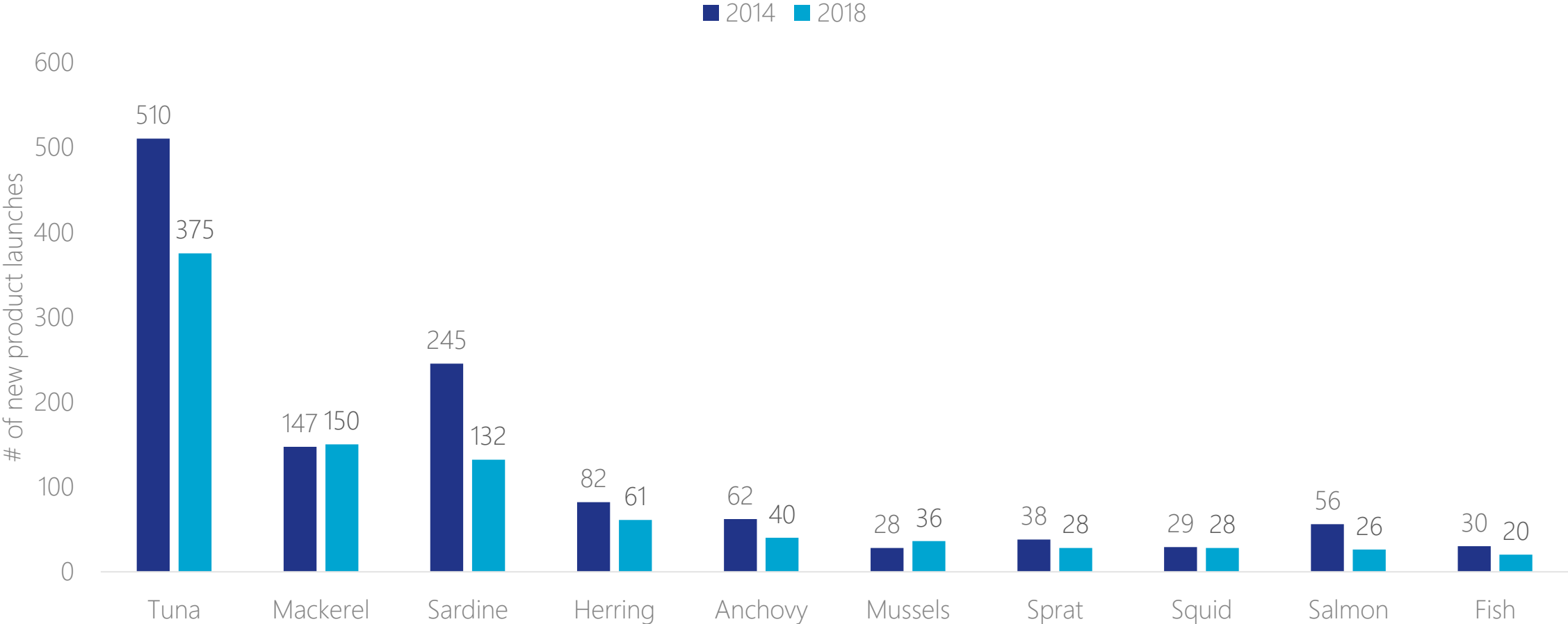
Top product bases as percentage (%) of shelf-stable fish & seafood new product launches tracked (Europe 2014 vs. 2018)

■ 2014 ■ 2018

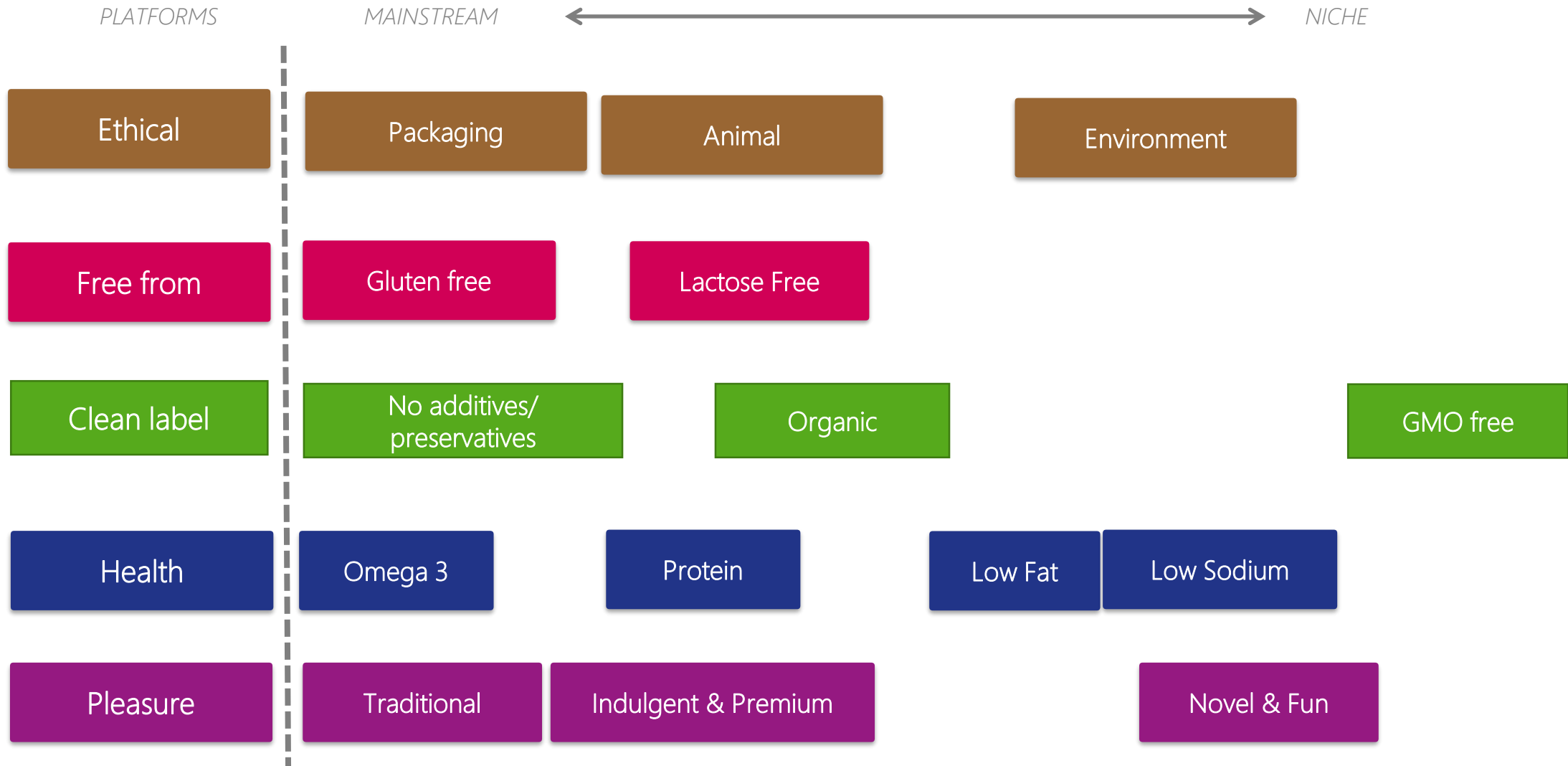


# Mackerel and mussels with highest growth in the last five years

Number of new shelf-stable fish & seafood products launches tracked per product base (Europe 2014 vs. 2018)



# Key innovation platforms in shelf-stable fish & seafood products



# European Consumer Insights in Meat, Fish & Eggs



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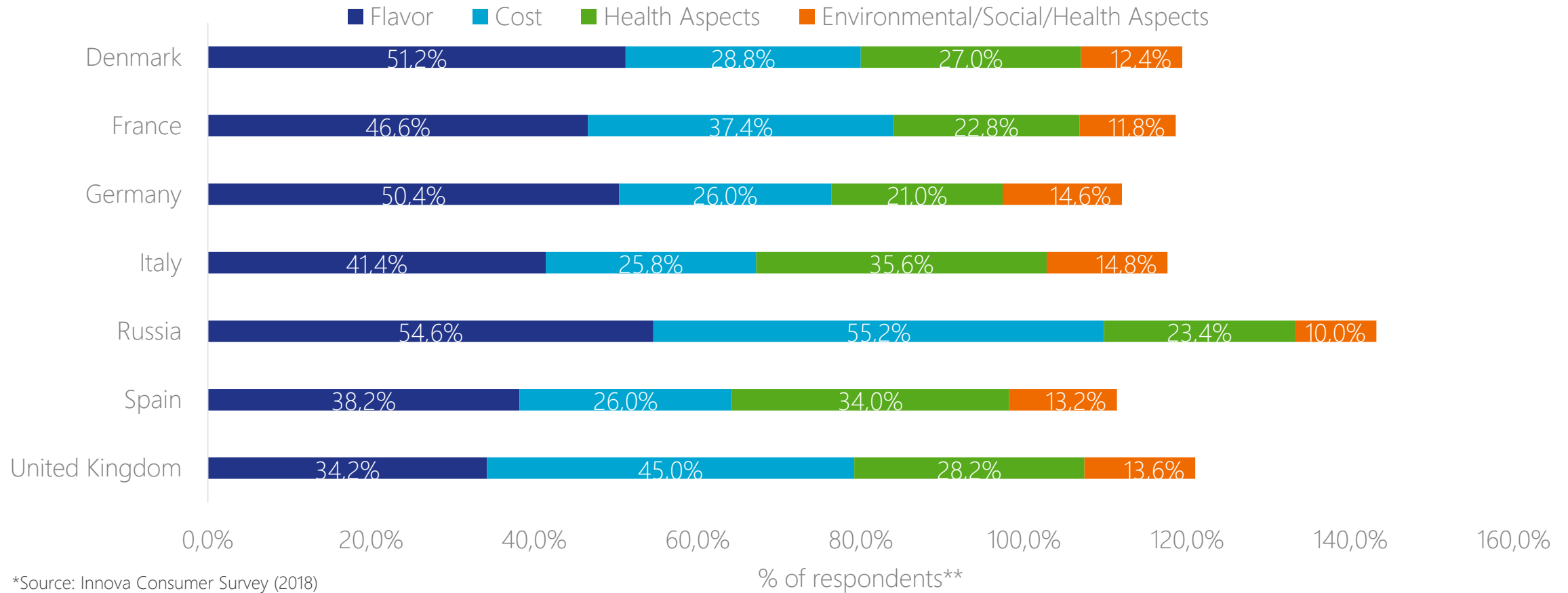


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# Flavor is the main factor consumers pay importance when buying fish

- Except in Russia and United Kingdom, where cost is the main factor, flavor is what consumers pay most importance when buying fish. Health aspects are specially important in Italy and Spain and ethical aspects are a concern for German consumers.

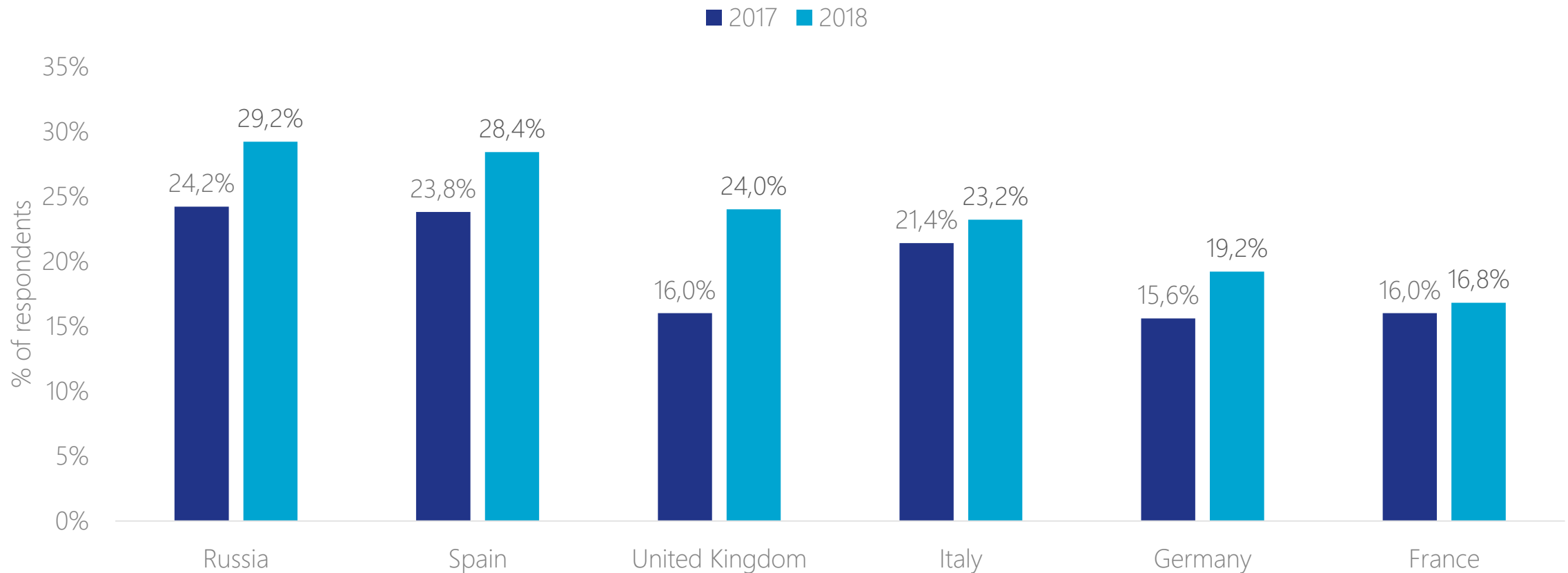
What factors do you pay importance to when buying meat, fish & eggs?\* (Europe, 2018)



# Fish consumption increased most in United Kingdom and Russia

- Although United Kingdom and Russia lead the increase in meat consumption, all the analyzed countries had positive results when comparing 2018 to 2017

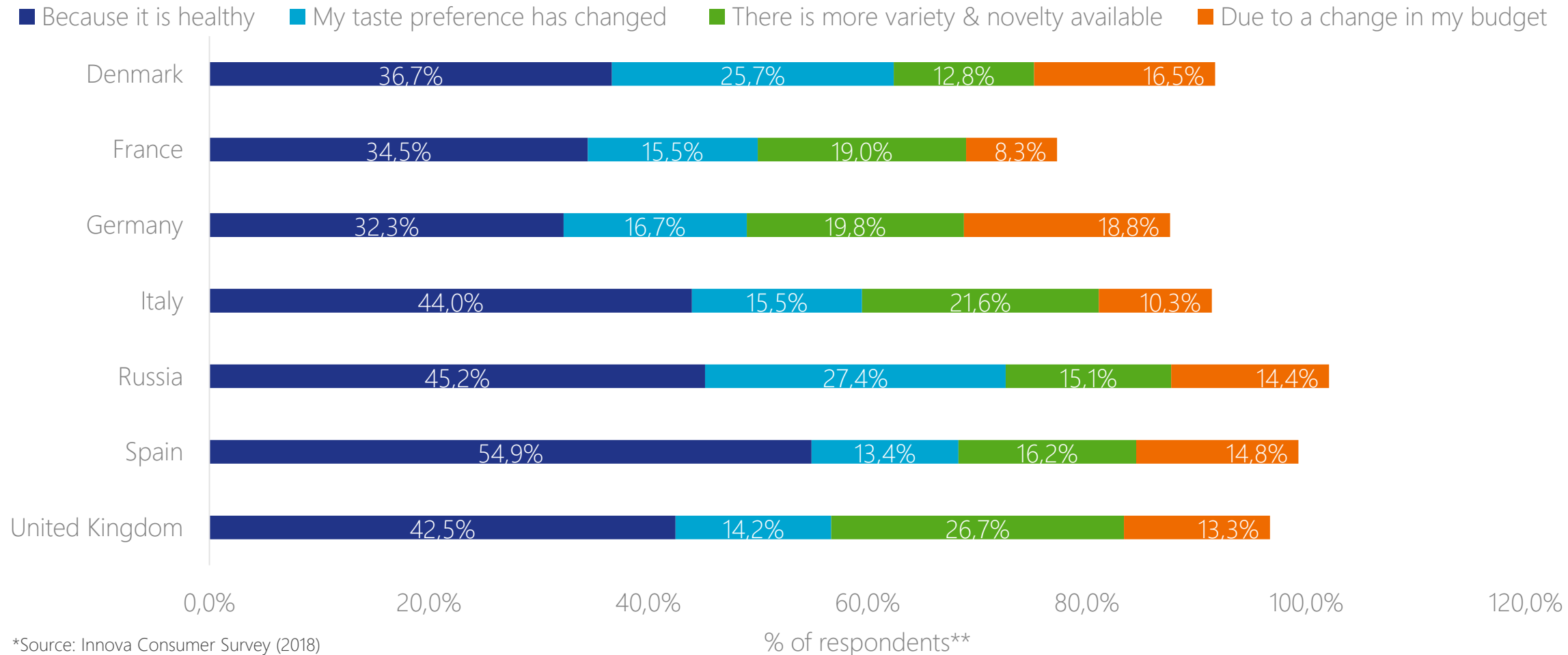
Have you increased your consumption of meat, fish & eggs over the last year? Answer: Yes \* (Europe, 2018 vs. 2017)



\*Source: Innova Consumer Survey (2018) and Innova Consumer Survey (2017)

# Health concern is top reason for fish consumption increase in Europe

Why have you increased your consumption of meat, fish & eggs?\* (Europe, 2018)

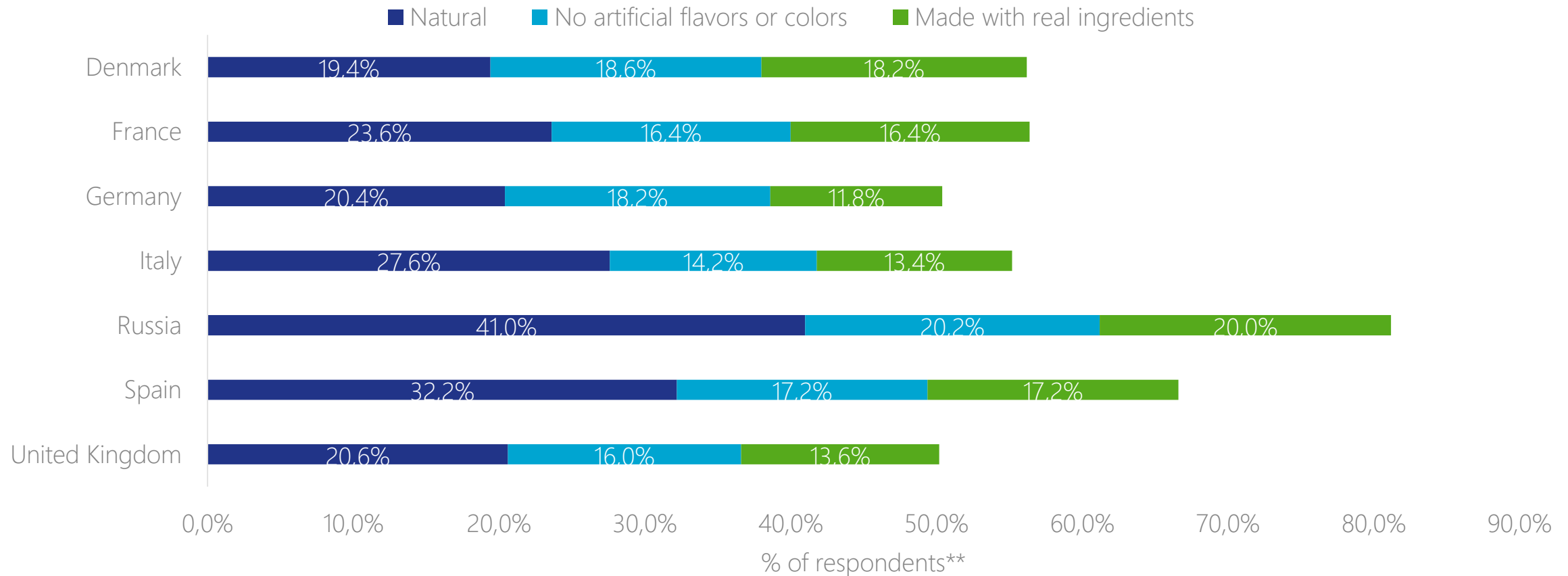




# Clean label is the main factor influencing fish purchase in Europe

- 'Natural' is the leading factor influencing purchase of meat, fish & egg products in all the analyzed countries followed by 'no artificial flavors or colors' and 'made with real ingredients'.

Choose up to three factors that most influence your purchasing decision when purchasing meat, fish & eggs?\* (Europe, 2018)



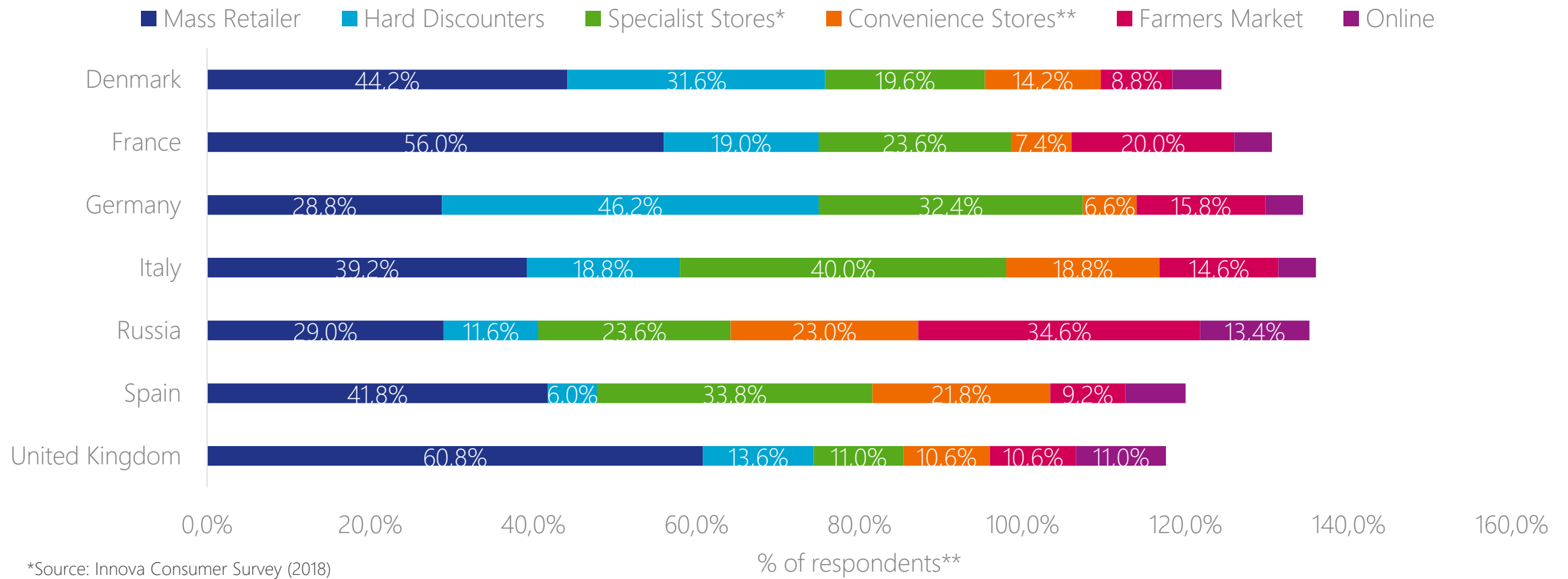
\*Source: Innova Consumer Survey (2018)

\*\*Results may be greater than 100% due to multiple answers by consumers.

# Physical stores still lead fish purchase, but online sales are emerging

- The channels in which meat, fish & eggs are purchased vary among countries in Europe. It is important to notice that online channel is emerging in all the analyzed countries and is stronger in Russia and United Kingdom.

Where do you typically purchase meat, fish & eggs?\* (Europe, 2018)



\*Source: Innova Consumer Survey (2018)

\*\*Results may be greater than 100% due to multiple answers by consumers.

# Overview of Trends in Traditional Shelf-Stable Fish & Seafood - Europe



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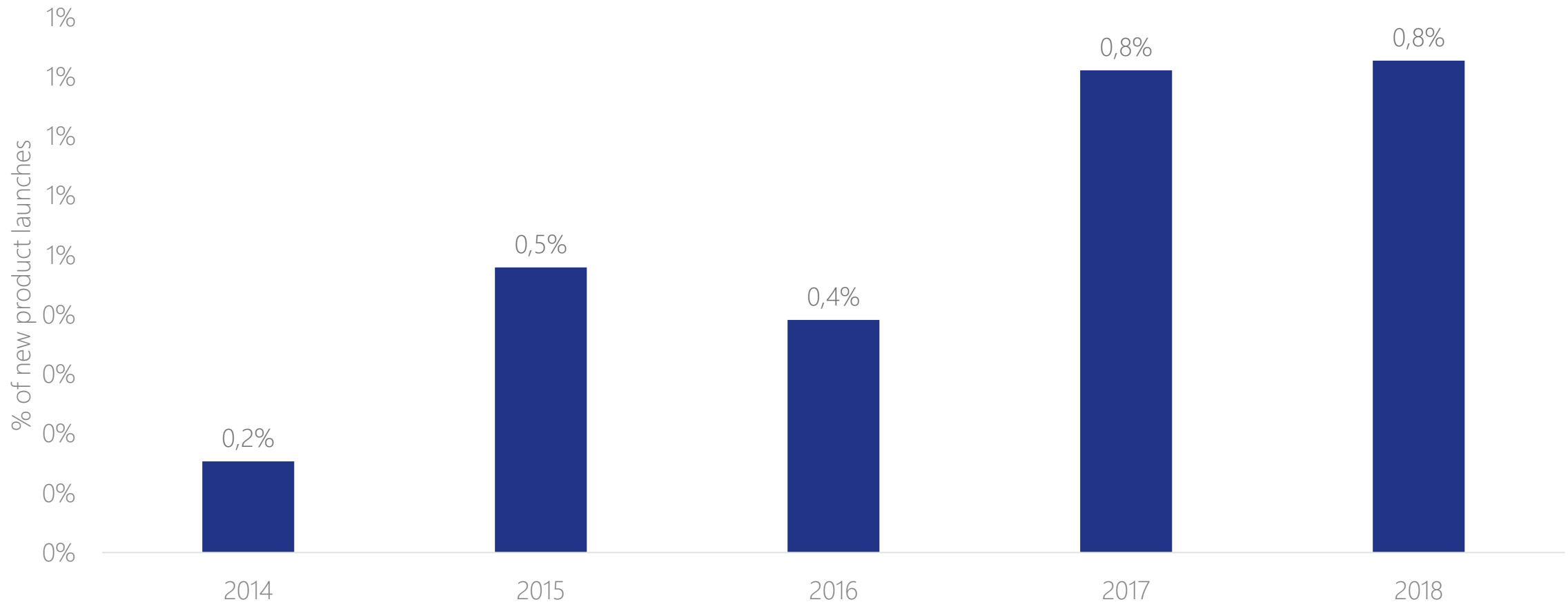


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# Origin seal is gaining more shelf space among fish & seafood

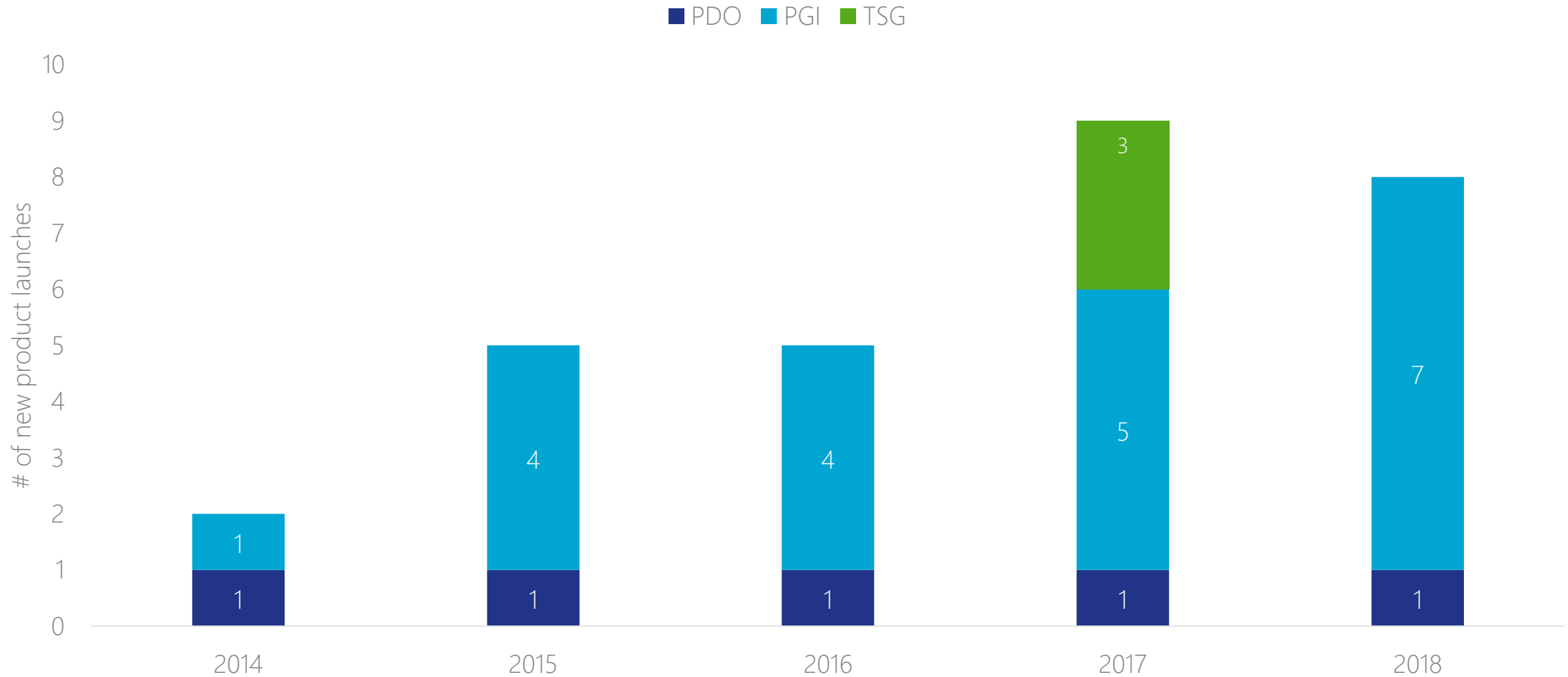
- With small penetration in fish & seafood, traditional/origin seal has an increasing presence in Europe.

**Share of shelf-stable fish & seafood with traditional/origin seal as percentage (%) of new shelf-stable fish & seafood product launches tracked (Europe, 2014-2018)**



# 2017 is the year with highest NPD with origin seals in fish & seafood

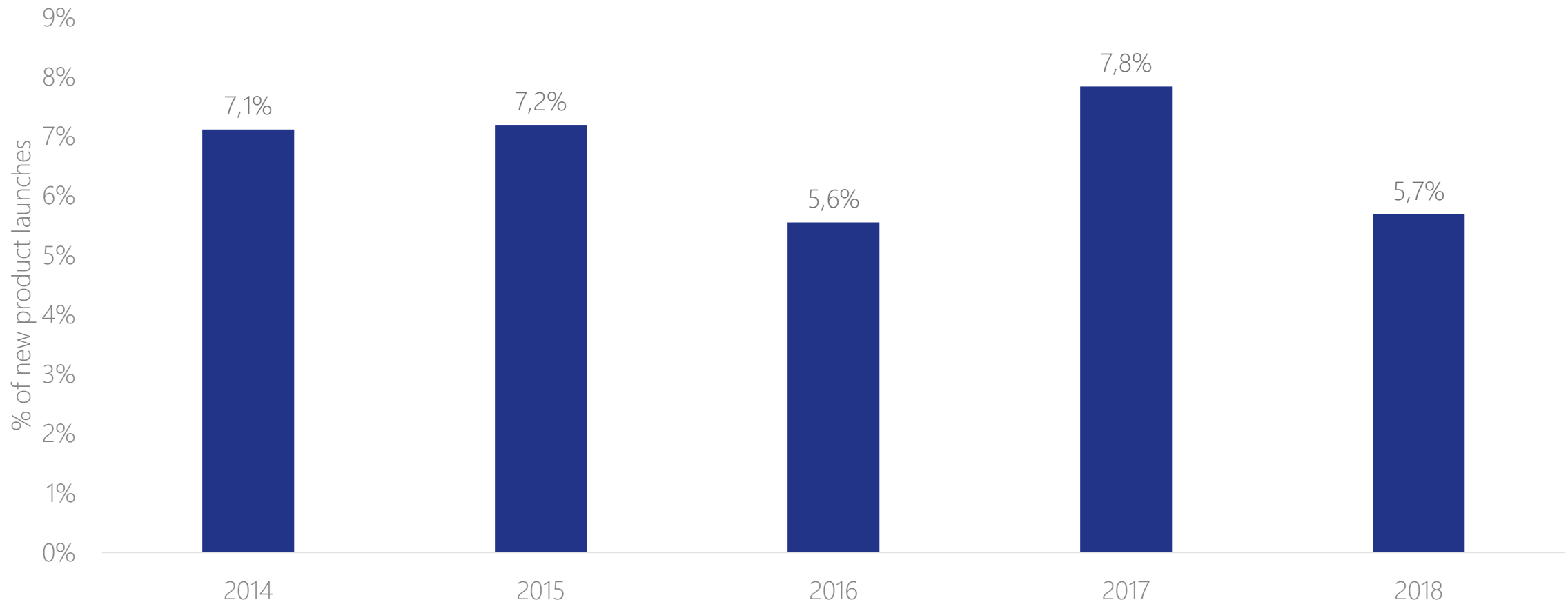
Number of new dairy products launches tracked with traditional/origin seal (Europe, 2014-2018)



# Traditional positioning is fluctuating in European fish & seafood products

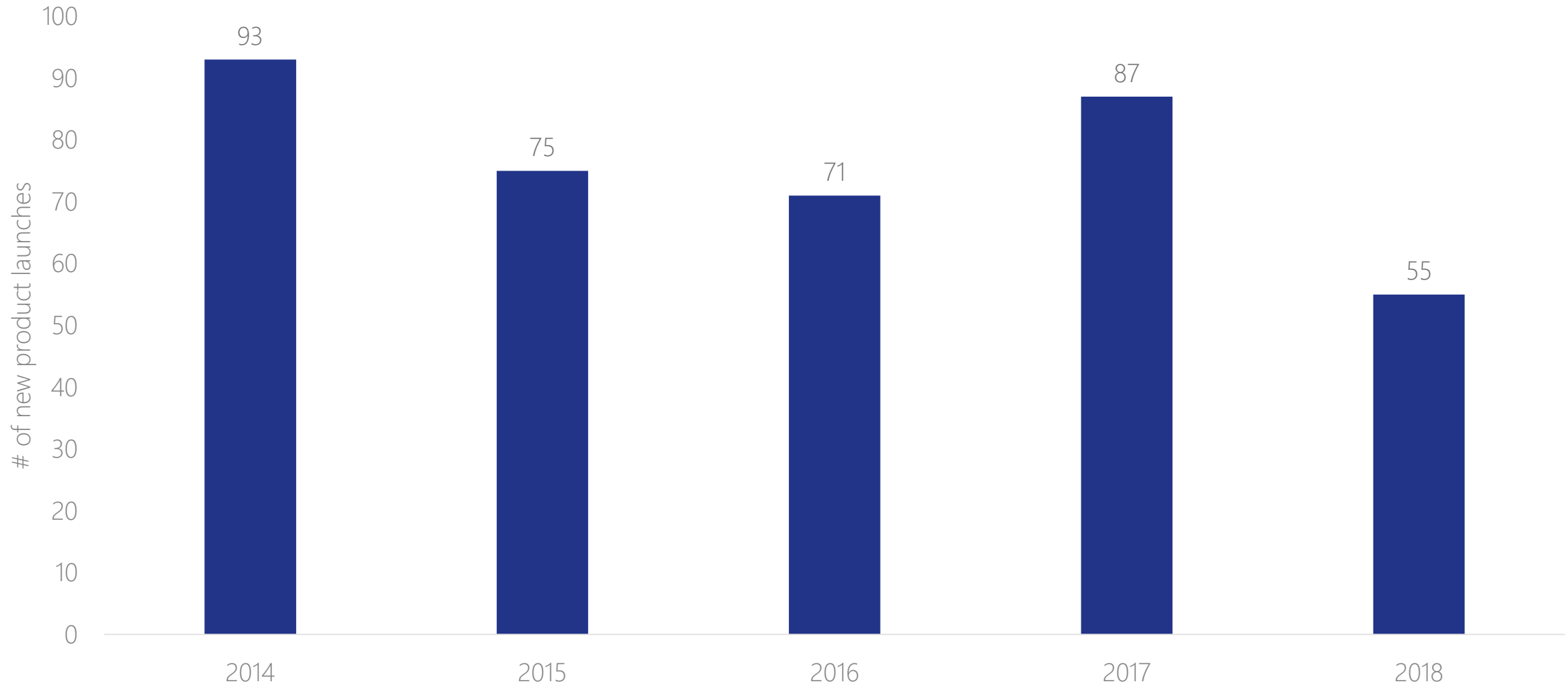
- Traditional positioning presence is not regular, in 2017 it reached a peak of 7.8% penetration in shelf-stable fish & seafood.

Share of traditional positioning as percentage (%) of new shelf-stable fish & seafood product launches tracked (Europe, 2014-2018)



# Traditional positioning is fluctuating in European fish & seafood products

Number of new shelf-stable fish & seafood products with traditional positioning launches tracked (Europe, 2014-2018)

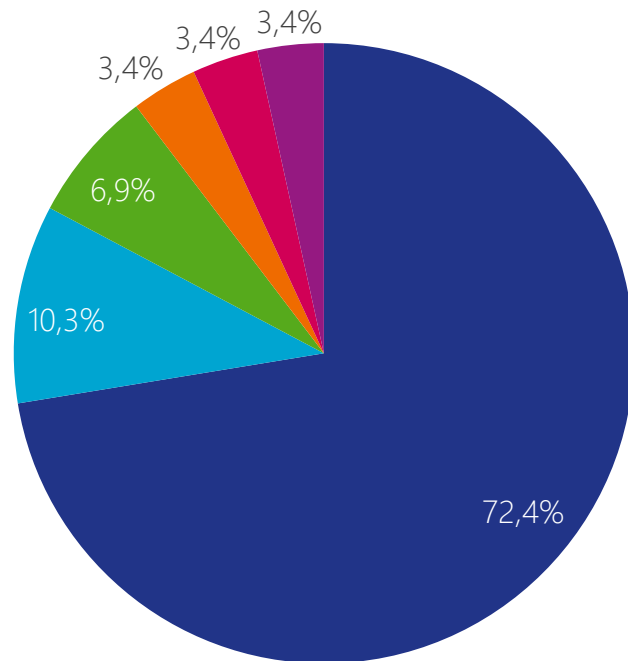


# Spain leads new product launches with traditional claims and origin seal

- Spain leads product launches activity in products with traditional/origin seal and also in products with traditional positioning regardless the seal. In traditional positioning the market is more competitive with more players and products from other countries whereas in origin seal the market is smaller.

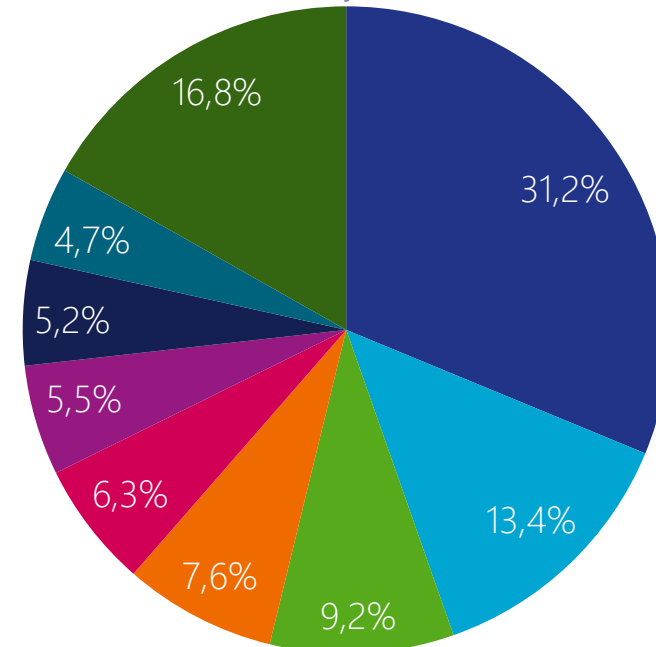
**Top countries as percentage (%) of new shelf-stable fish & seafood product launches tracked with traditional/origin seal (Europe, 2014-2018)**

Spain France United Kingdom Belgium Italy Macedonia



**Top countries as percentage (%) of new shelf-stable fish & seafood product launches tracked with traditional positioning (Europe, 2014-2018)**

Spain France Italy  
Poland United Kingdom Germany  
Portugal Norway Other countries

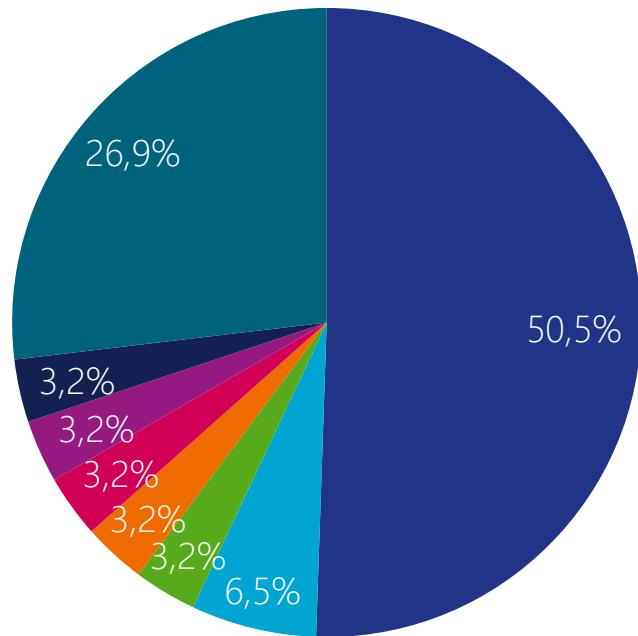




# Conserverie Gonidec is the top company with traditional positioning in 2018

Top companies as percentage (%) of new shelf-stable fish & seafood product launches tracked with traditional positioning (Europe, 2014)

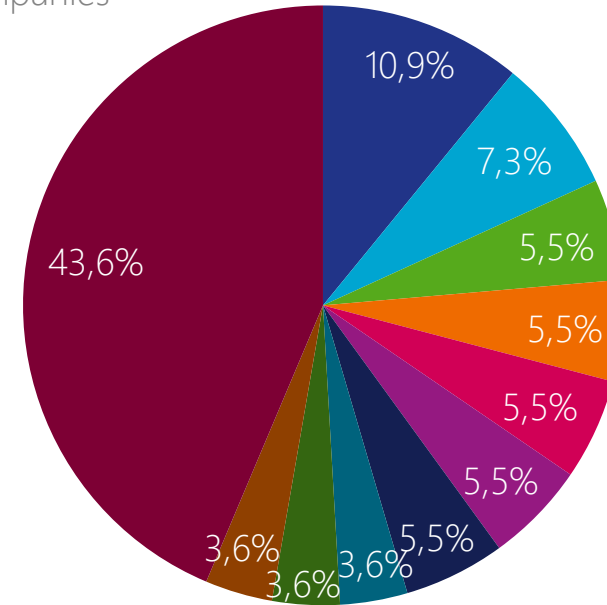
- King Oscar
- John West
- Auchan
- Labeyrie Fine Foods
- Mareblu
- Sardina
- The Pilchard Works
- Other companies\*



\* Other companies = 22 companies

Top companies as percentage (%) of new shelf-stable fish & seafood product launches tracked with traditional positioning (Europe, 2018)

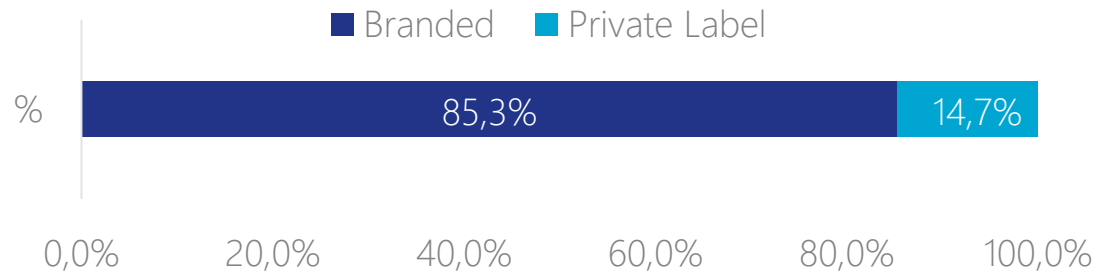
- Conserverie Gonidec
- Conservas Selectas De Galicia
- El Corte Ingles
- Rizzoli Emanuelli
- Compre Y Compare
- Other companies\*\*
- Salazones Garre
- Coresa Conserveiros Reunidos
- Oliviers And Co
- Auchan
- Morrisons



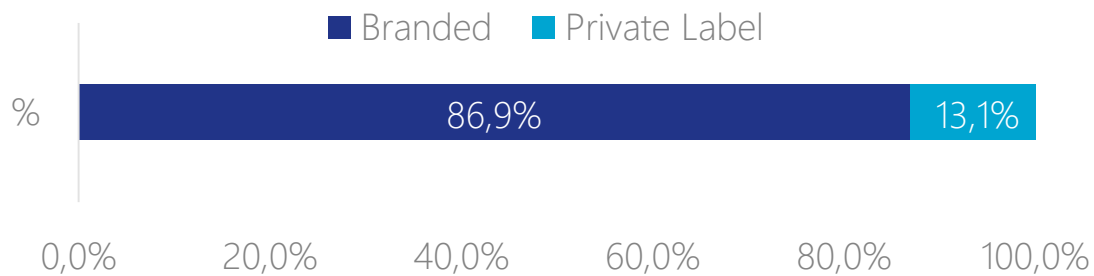
\*\* Other companies = 24 companies

# Branded products lead shelf-stable fish & seafood product launches

Share of branded and private label as percentage (%) of new shelf-stable fish & seafood product launches tracked with traditional/origin seal (Europe, 2014-2018)



Share of branded and private label as percentage (%) of new shelf-stable fish & seafood product launches tracked with traditional positioning (Europe, 2014-2018)



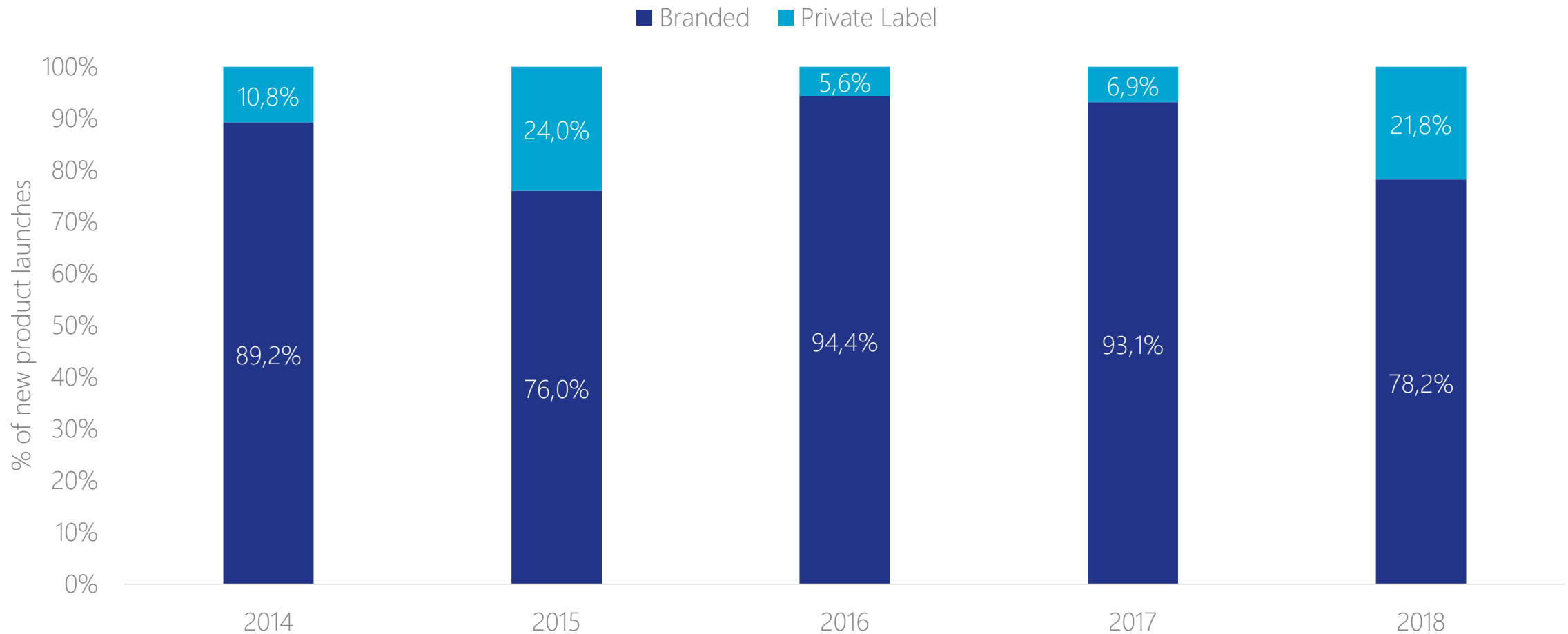
**Tejero Filetes De Caballa De Andalucía En Aceite De Oliva: Andalucía Mackerel Fillets In Olive Oil**

France, Apr 2019

CLAIMS Natural source of omega 3. Certified quality. **Protected Geographical Indication logo.** Handmade. Green Dot Certified.

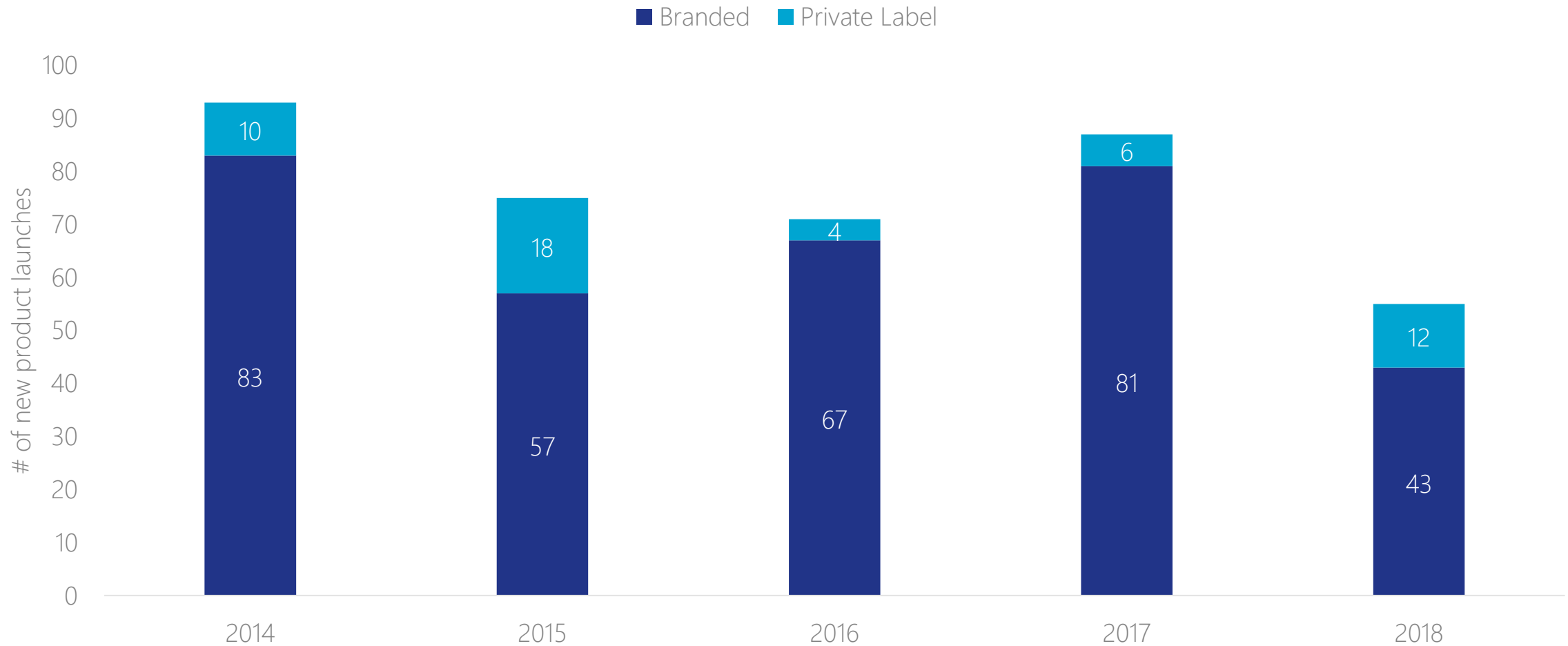
# More branded products with traditional positioning and absence of seal

Share of branded and private label as percentage (%) of new shelf-stable fish & seafood product launches tracked with traditional positioning (Europe, 2014-2018)



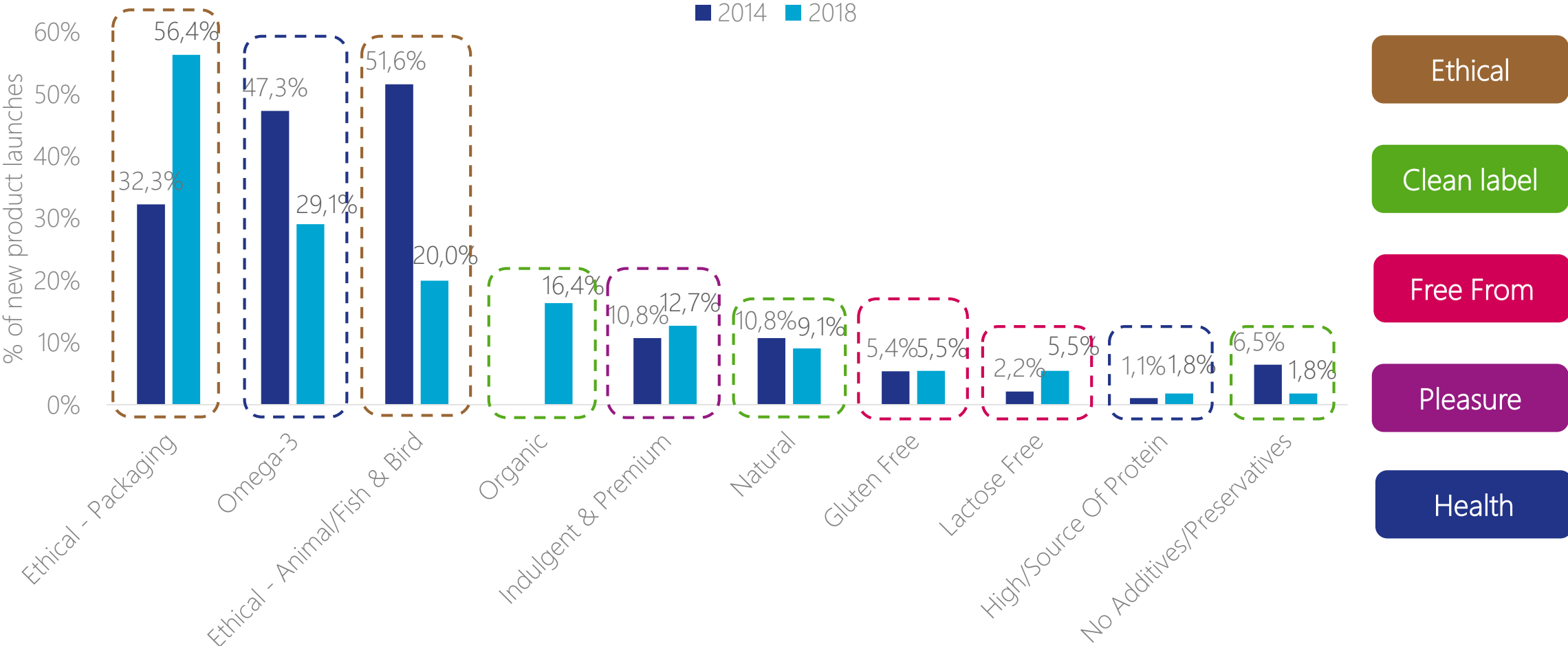
# More branded products with traditional positioning and absence of seal

Number of new shelf-stable fish & seafood products with traditional positioning branded and private label (Europe, 2014-2018)



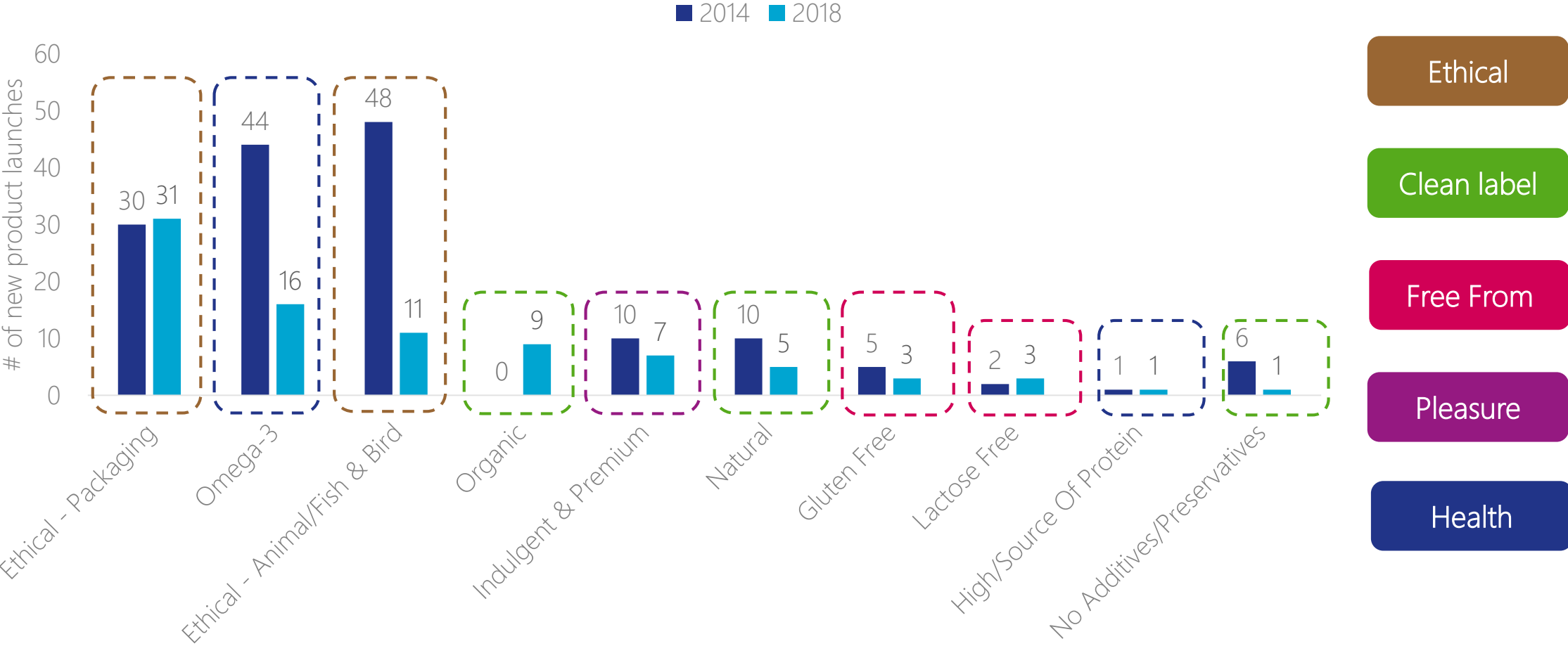
# Ethical claims on top of shelf-stable fish & seafood with traditional positioning

Top positionings as percentage (%) of shelf-stable fish & seafood new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)



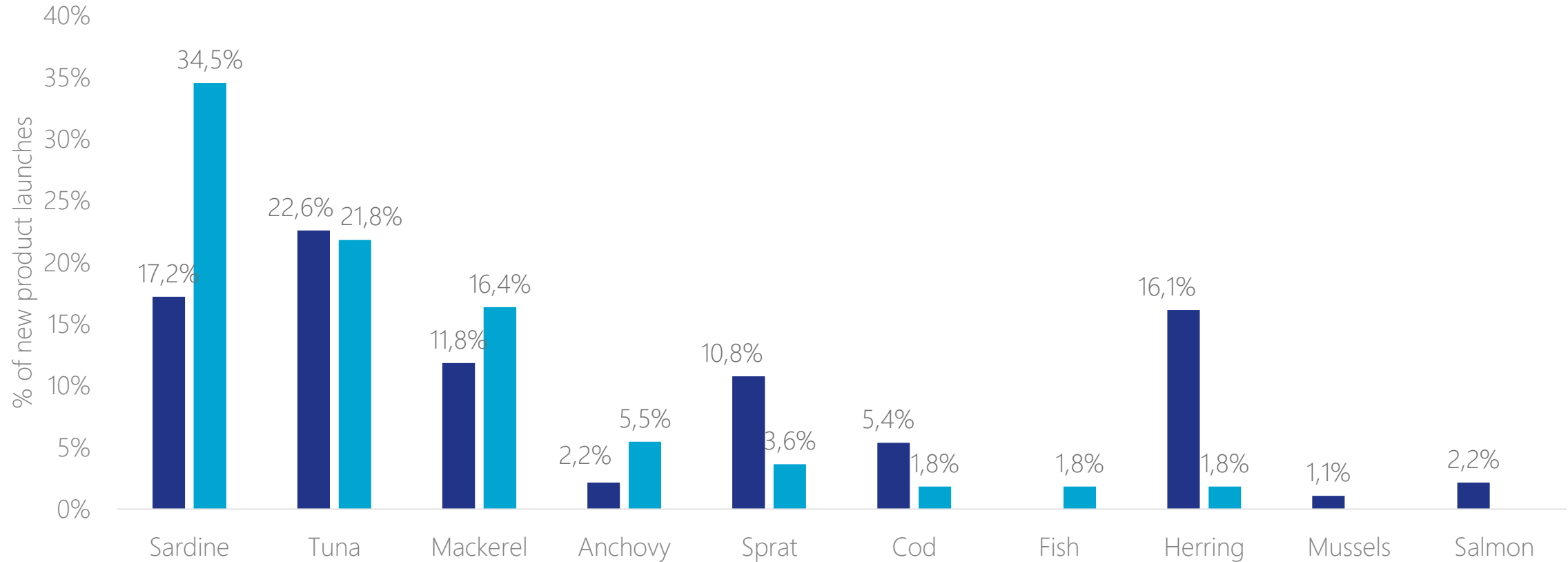
# Ethical claims on top of shelf-stable fish & seafood with traditional positioning

Number of new shelf-stable fish & seafood products with traditional positioning launches tracked per positioning (Europe, 2018 vs. 2014)



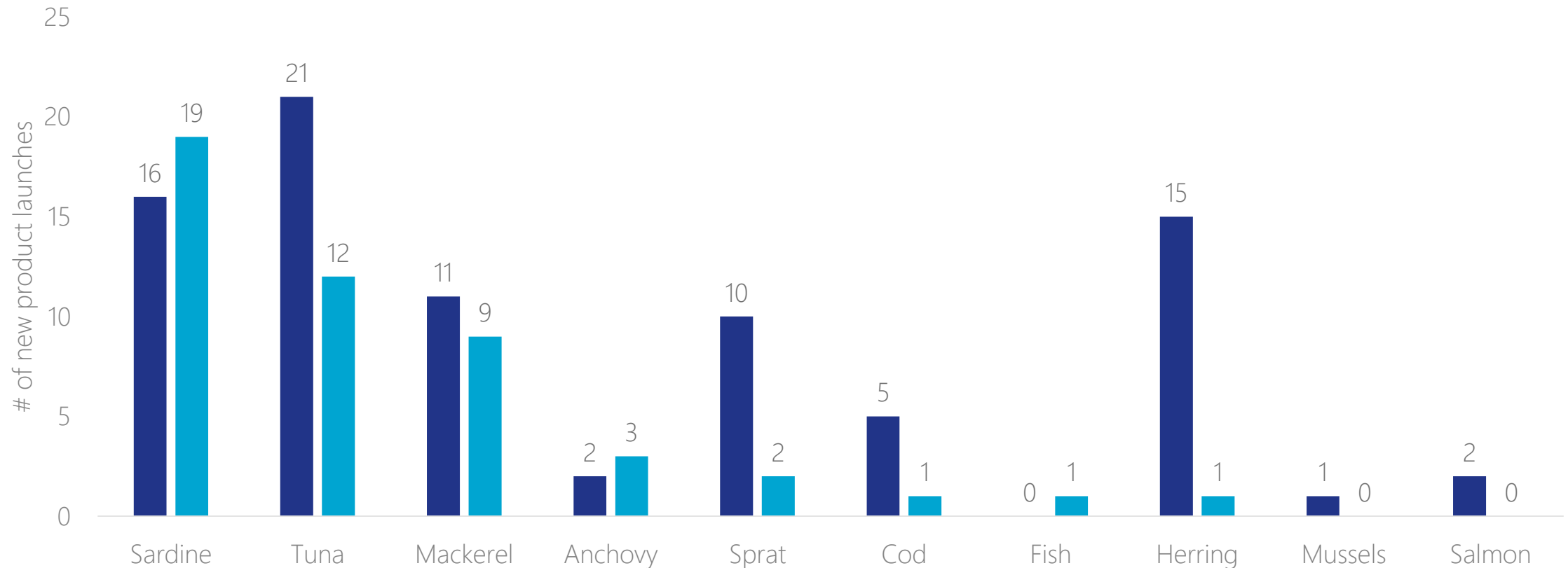
# Sardine: top base of shelf-stable fish & seafood with traditional positioning

Product base as percentage (%) of shelf-stable fish & seafood new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)



# Sardine: top base of shelf-stable fish & seafood with traditional positioning

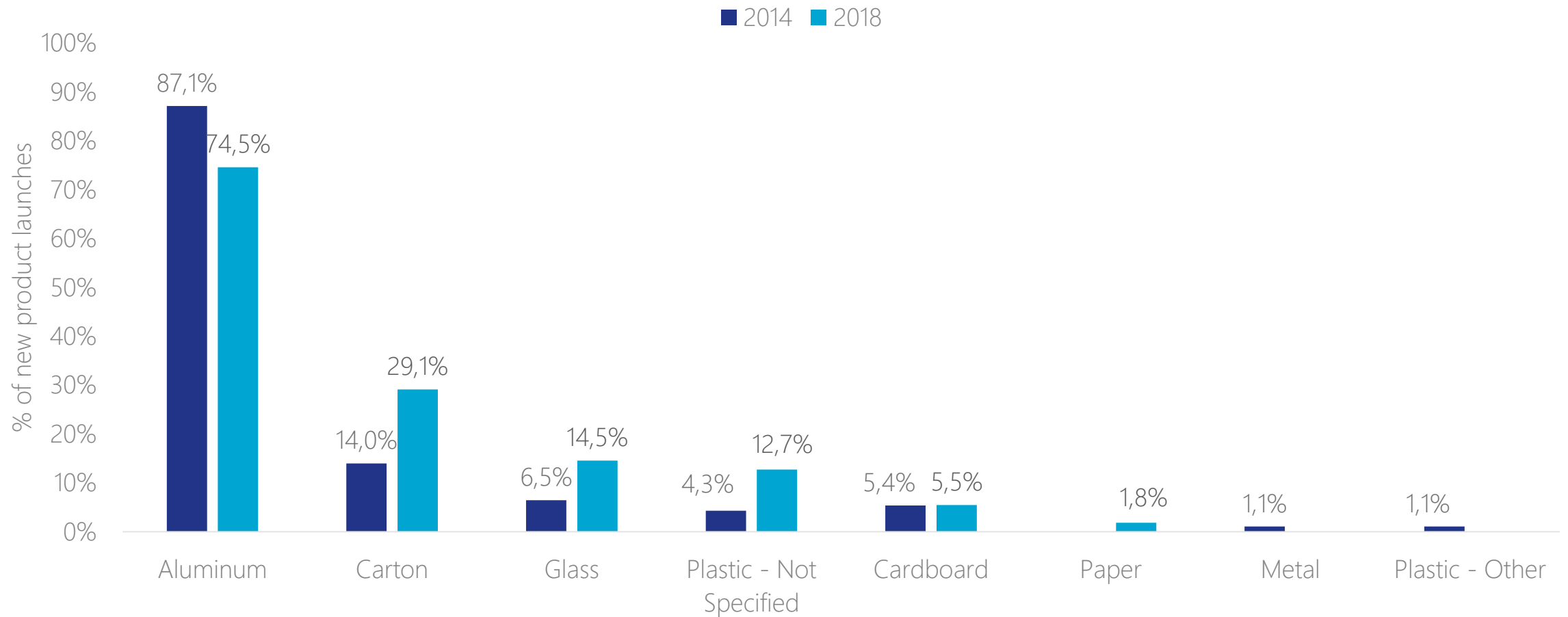
Number of new shelf-stable fish & seafood products with traditional positioning launches tracked per product base (Europe, 2018 vs. 2014)





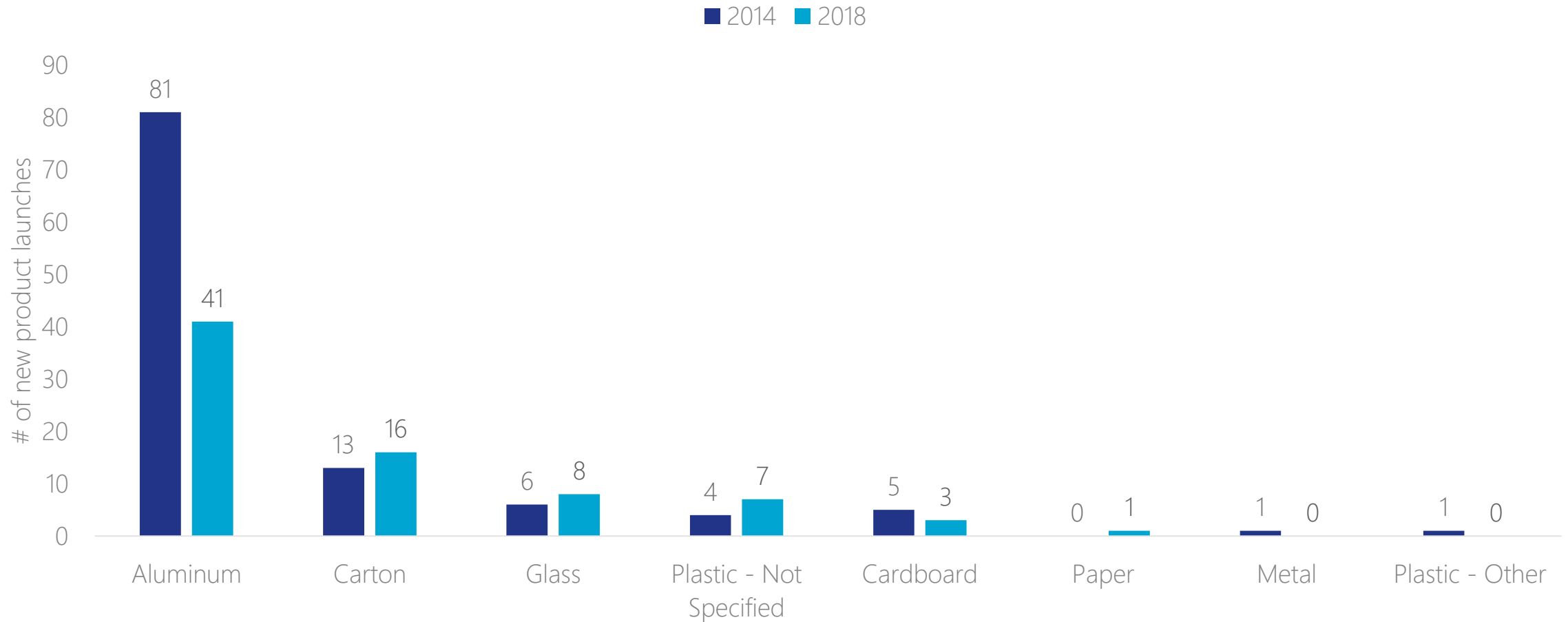
# Aluminum remains main packaging material in shelf-stable fish & seafood

Packaging material as percentage (%) of shelf-stable fish & seafood new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)



# Aluminum remains main packaging material in shelf-stable fish & seafood

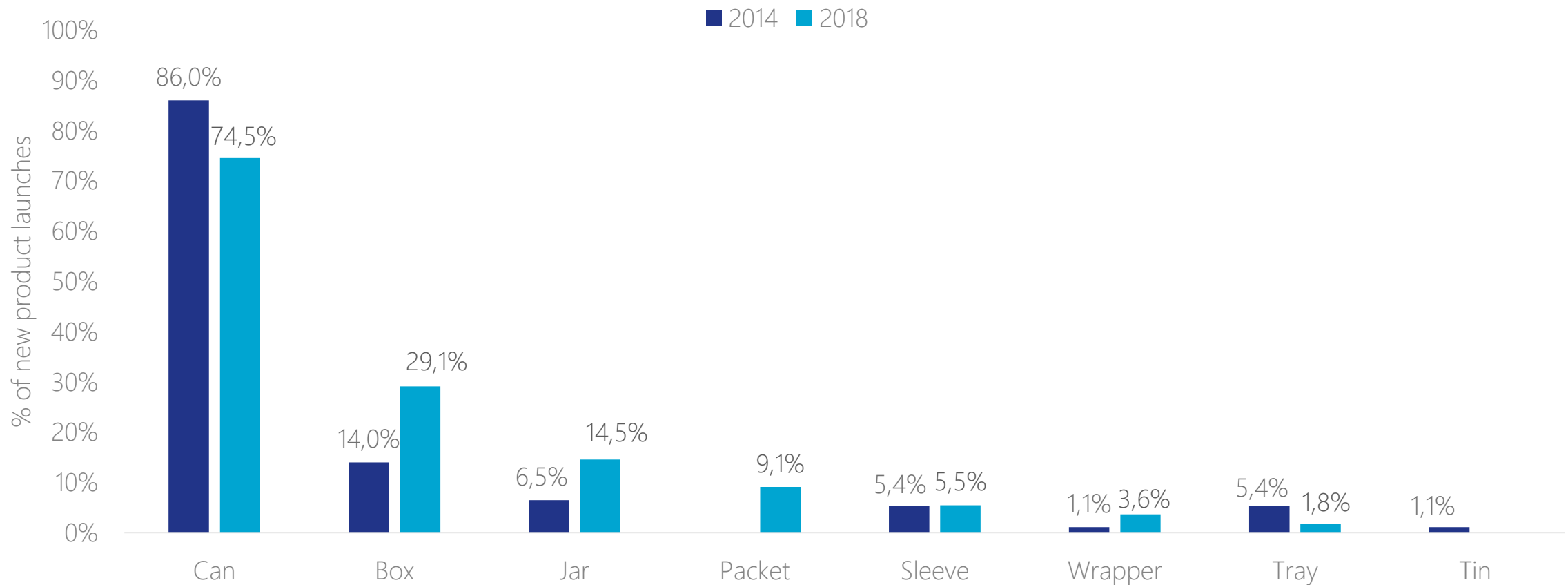
Number of new shelf-stable fish & seafood products with traditional positioning launches tracked per packaging material (Europe, 2018 vs. 2014)



# Can leads shelf-stable fish & seafood packaging

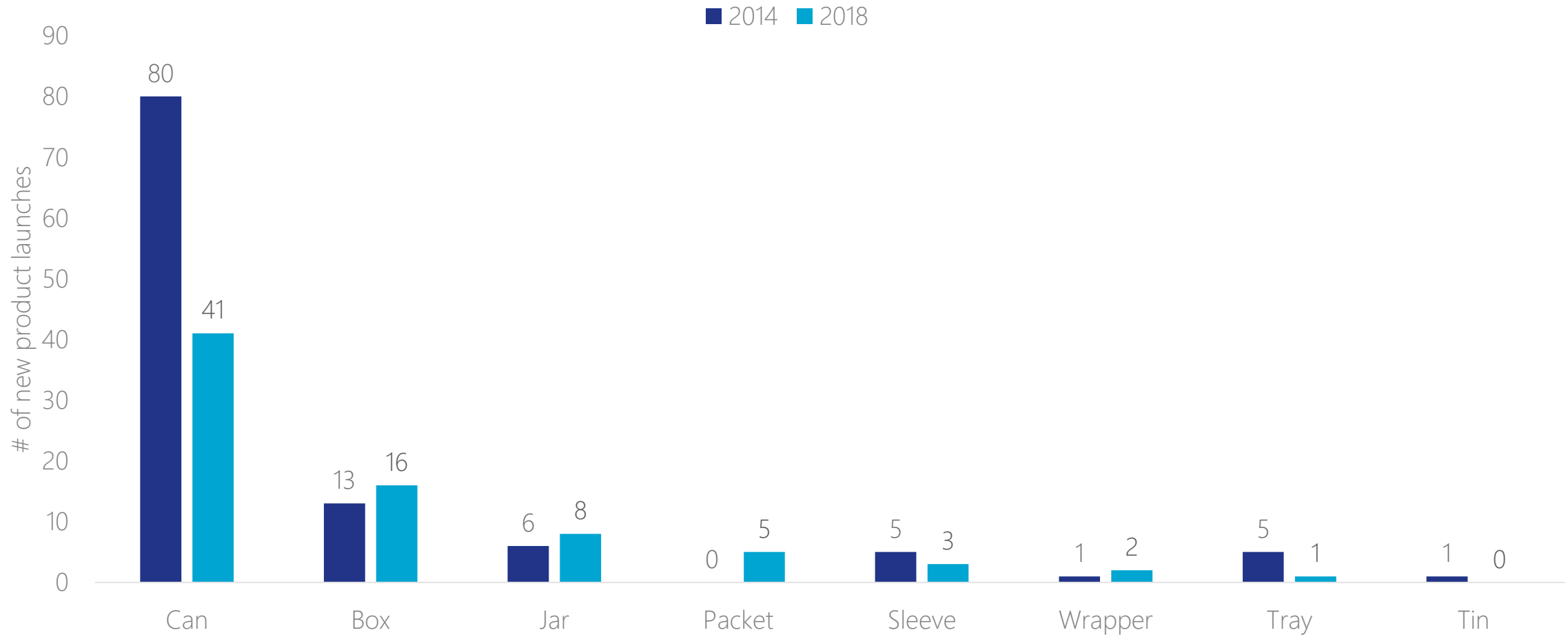
- Box, jar, packet and wrapper are growing options for traditional shelf-stable fish & seafood products in alternative to can.

**Packaging type as percentage (%) of shelf-stable fish & seafood new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)**



# Can leads shelf-stable fish & seafood packaging

Number of new shelf-stable fish & seafood products with traditional positioning launches tracked per packaging type (Europe, 2018 vs. 2014)



# Innovation Opportunities in Shelf-Stable Fish & Seafood Products with Traditional/Origin Seal - Europe



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# Spotlight on ethical claims: animal, environment and human

## ANIMAL



### Mareblu Tonno All'olio Di Oliva: Tuna In Olive Oil

Italy, Mar 2019

CLAIMS No preservatives and artificial flavors. **Turtle love. Also up for grabs calendar of the Sea 2019 to save turtles.** Less waste. Project in collaboration with Legambiente. PEFC logo. Dolphin safe. Quality yellowfin. Green Dot Certified.

## ENVIRONMENT



### Calvo Mejillon En Escabeche Picante: Spicy Pickled Mussels

Spain, Mar 2019

CLAIMS 13/18 units. Made with Galician mussel. Protected designation of origin. **Our mussels come from an ecological cultivation and responsible with the environment.** Small size. Green Dot Certified. Recyclable packaging.

## HUMAN



### Followfish Thunfisch Filets In Eigenem Saft: Tuna Fish Fillets In Own Juice

Belgium, Feb 2019

CLAIMS Rod fishing. MSC certified. Dolphin safe. Fished by hand. **Fair Trade Certified.** FSC certified. Recyclable packaging.

# Well-established traditional claims in products without origin seal



## Sovok Sterilized Salmon

Russia, May 2019

CLAIMS Natural. **Traditional**. Recyclable packaging.



## Miau Caballa Filetes En Aceite De Oliva: Mackerel Fillets In Olive Oil

Spain, Apr 2019

DESCRIPTION **Traditional production**. This can contains clean loins without skin or bones of southern mackerel. It is natural, without preservatives, without coloring and without gluten...



## Conservas Ortiz Verdell Frito En Escabeche: Fried Pickled Mackerel

Spain, Mar 2019

CLAIMS **Old style recipe**. Contains a whole mackerel. Source of Omega 3. Green Dot Certified.

# Front-of-pack prominence for organic claims



**Campos Bonito Del Norte En Aceite De Oliva Virgen Extra Ecologico: Tuna In Organic Extra Virgin Olive Oil**

Spain, Mar 2019



**Le Tresor Des Dieux Sardines A L'huile D'olive Bio: Sardines In Organic Olive Oil**

France, Mar 2019



**Ortiz El Velero Bonito Del Norte En Aceite De Oliva Organico: White Tuna In Organic Olive Oil**

Spain, Feb 2019



# Handmade products convey an artisanal image to fish & seafood



## Petra Mora Sardinas En Aceite De Oliva Picantes: Spicy Sardines In Olive Oil

Spain, Feb 2019

CLAIMS **Hand packed**. We firmly believe in sustainable fishing with our environment and we respect the periods of ban of this fish. Quality versus quantity. This Convention allows us to have the best sardines each year. Green Dot Certified.



## Pesasur Maquereau A L'huile D'olive Vierge Extra Biologique: Mackerel With Organic Extra Virgin Olive Oil

France, Mar 2019

CLAIMS **Handmade**. Protected Geographical Indication logo. Certified quality. CAEE logo. Natural source of omega 3. Artisan made. Green Dot Certified.

# Omega-3 claims retain a significant role



## Graal Filety Ze Sledzia W Oleju: Herring Fillets In Oil

Macedonia, May 2019

CLAIMS **Rich in omega 3**. Source of vitamin D and vitamin B12. Recyclable packaging.



## Hacendado Sardinillas En Aceite De Oliva: Sardines In Olive Oil

Spain, Apr 2019

DESCRIPTION **High content of fatty acids (Omega 3)**. Reduced salt content. Green Dot Certified. Recyclable packaging.



## Appel Makrelenfilets In Olivenöl Ohne Haut: Mackerel Fillets In Olive Oil Without Skin

Germany, Jan 2019

CLAIMS MSC certified. **Rich in omega 3 fatty acid**.

# Spotlight on emerging ethnic inspired flavors

## THAI



**Hawesta Thunfisch Stückchen Milde Thaisauce: Tuna Pieces In Mild Thai Sauce**

Germany, Mar 2019

## ASIAN



**Appel Golden Brown Fried Herring Fillet In Asian Seasoned Infusion Refined With Bamboo Strips, Paprika And Mushrooms**

Germany, Mar 2019

## AMERICAN



**Supersol Trozos De Potas En Salsa Americana: Squid Pieces In American Sauce**

Spain, Feb 2019

# Fruit inclusions add a sweet touch to fish & seafood

## CRANBERRY



Losos Ustka Losos W Sosie Żurawinowym Dla Dzieci: Salmon With **Cranberry Sauce** For Children

Poland, Jan 2019

## MANGO



Nixe Wild Pink Salmon Fillets In **Mango And Pepper Sauce**

Belgium, Mar 2019

## PINEAPPLE



K Favourites Heringfilets Curry-Ananas-Creme: Herring Filets In Curry **Pineapple Cream**

Germany, Apr 2019

# Unusual oils emerging to create differentiation on the market

## COCONUT OIL



Fish 4 Ever Sustainably Fished Skipjack Tuna Steaks In **Organic Coconut Oil**

United Kingdom, Mar 2019

## PEANUT OIL



Capitaine Cook Sardines A L Huile D Arachide Prepees A L Ancienne: Old Style Sardines In **Peanut Oil**

France, Jan 2019

# Key learnings & What's next ?



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# Key learnings & What's next ?

## Organic positioning is gaining ground

Traditional shelf-stable fish & seafood innovation is getting more organic and natural. Organic claim penetration in traditional shelf-stable fish & seafood products has increased 9,2% on average in the last five years in Europe (CAGR, 2014-2018) and GMO-free positioning increased 0,7% on average in the same period, signalling consumer demand for clean label products.

## Targeting the adventurous consumer

Consumers are moving out of their comfort zones to explore bolder flavors. In this context, traditional products with new elements such as new sauces, unusual oils and ethnic spices may arouse consumer's curiosity and create differentiation in the market.

## Ethical issues lead from health positionings

Ethical positionings are the leading claims for shelf-stable fish & seafood products. Ethical-animal, fish, bird, is related to increase in responsible fishery activity and respect to other sea animal species such as turtles and dolphins, that may be harmed by predator fishery. Omega 3 is the top health positioning, used by a range of oily fish, including salmon, mackerel and sardines. In smaller number of product launches, claims such as low fat and low sodium are emerging.

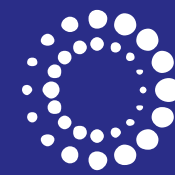
## Artisanal practices makes for premium products

Although industrial processes have an important participation in fish & seafood production, craft products are not at risk. Consumer demand for handmade\* products increased 24,1% in 2018 (Europe, YoY 2018 vs. 2017). Handmade processes convey an old-style image and a sense of nostalgia.

\*Free text search for "hand" claims and product description.



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