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SEAFOOD CONSUMPTION

Consumer Trends

“Home-Spun”

- ◆ **Last year consumers purchased \$22.7 billion worth of seafood for home preparation and though home is still the favorite place to eat...**
- ◆ **...the majority of seafood dollars (\$46.6 billion) are spent at restaurants**
- ◆ **Food sales at contract-managed services are climbing:**
Primary and secondary schools; hospitals and nursing homes; colleges and universities; airlines and recreation/sports centers
- ◆ **Stronger demand for locally-grown and seasonal foods:**
Sonoma Duck, Nantucket Scallops, Napa Valley Dairy



Consumers are time-starved

- ◆ **Four of American's top time-saving activities involve food: 68% often/sometimes eat at a fast food restaurant to save time, 64% bring home take-out meals, 41% eat frozen or prepared meals, and 36% cook the main course in a microwave**
- ◆ **79% of consumers say the most enjoyable part of cooking is servicing the finished meal**
- ◆ **Almost half (46%) of US food dollars are spent away from home, but by 2010, 53% of US food dollars will be spent away from home**



Consumers Prefer Fresh and Pre-Prepared Seafood Meals...

- ◆ **Per capita consumption of seafood in the United States increased from 14.6 pounds in 1997 to 16.5 pounds in 2006**
- ◆ **Seafood is among America's most frequently served main dishes**
- ◆ **Pre-prepared fresh seafood accounted for 25% of all in-store seafood sales**
- ◆ **Shrimp and crab cakes remain the overall best restaurant sellers: *Grilled seafood sandwiches, seafood nuggets, shrimp on pizza, seafood quiche, seafood ravioli, seafood tacos***



Consumers Prefer Fresh and Pre-Prepared Seafood Meals...

- **Shrimp** comprised more than half of shellfish entrees
- **Crab, shrimp and clams** are replacing high-fat breakfast meats in trendy restaurants: *seafood omelets, seafood quesadillas, fish-of-the-day with two eggs and hash browns*
- **Seafood salads** featuring shrimp and salmon are growing in popularity
- **Clam/seafood chowders** remain the best selling soups in fine-dining, casual-dining and hotel/motel restaurants



Consumers Prefer Fresh and Pre-Prepared Seafood Meals...

- **Fried seafood represents nearly 50% of all restaurant appetizer sales**
- **Seafood dips accounted for more than 10% of new menu items in 2001**
- **Down-home fish appetizers such as *Tuna Salad on Pita Points*; crab and shrimp samplers; fried, bite-sized morsels including clams, mussels, scallops, and oyster are gaining consumer acceptance**



Balanced Nutrition

- **Strong move toward more protein in the diet**
- **Most seafood is high protein, low fat**
- **Omega-3 oils are heart-healthy**
- **Omega-3 oils seem to reduce memory loss in older adults**



Balanced Nutrition

- **Low in calories**
- **Excellent source of B complex vitamins, particularly B12 and B6.**
- **Six in ten adults believe they can greatly reduce the risk of disease by eating healthfully**
- **Baby boomers are fueling the increase in seafood consumption**



Light and Lively



- Demand is increasing for natural foods
- From “*dock to wok*”: *Freshness* will be the most important restaurant trend of the next decade
- More pressure on producers to offer fresher or fresher-looking products
- “*Trend to fresh*” will close the gap toward “*living foods*”: *Selecting fish and seafood from live tanks; sushi becoming mainstream*



Clean, Pure, Natural and Safe Food

- **Food poisoning outbreaks, environmental contamination, and the rise in seafood imports are accelerating the demand for locally-harvested products**
- **“Natural” and “organic” = “Premium” and “Safe”**
- **The demand for local is giving rise to premium markets: *Farm Fresh* and *CarteretCatch*TM**
- **HACCP: Hazard Analysis and Critical Control Point monitoring**

Top Ten Most Popular Seafood Commodities

 *Shrimp*

 Canned Tuna

 Salmon

 Pollack

 Tilapia

6. Catfish

7. *Crab*

8. Cod

9. *Clams*

10. *Scallops*

Other favorites: *Flounder* and *oysters*



Restaurant Criteria for Assessing Quality

- **The flesh of fin fish must be firm to the touch**
- **Scales of fin fish must be bright and adhere tightly to carcass**
- **Fin fish must be free of excess slime and filth**
- **No offensive odors**
- **Bright red gills: fin fish carcasses delivered without gills are likely to be rejected**
- **Eyes clear and bulging**



Restaurant Criteria for Assessing Quality

- **Shrimp must be sorted so they are of a consistent size and appearance**
- **Crab meat must be free of excess cartilage, egg particulates and offensive odors**
- **The liquid of shucked oysters must be clear, the meat plump and free of offensive odors**
- **Live shellfish must be of a consistent size and have tightly closed lids; lids must close when tapped**



Service Expectations of Restaurants



- **Chefs prefer a diverse selection of fin fish and shellfish**
- **Prefer large fin fish (20 lbs. or greater) be headed, gutted, scaled and filleted**
- **Small fin fish (less than 20 lbs.) can be head-on but must be gutted**
- **Fin fish must be received packed in ice, not floating in ice water**
- **Chefs prefer direct-door delivery**



Service Expectations of Restaurants

- **Fraud will not be tolerated:** *Thawed, previously frozen seafood sold as fresh-caught; species substitution, out-of-state shellfish advertised as locally-harvested*
- **Price consistency:**
 - **Highest quality at lowest price**
 - **Extreme price fluctuations**
 - **Different price structures for different markets**
- **Most coastal restaurants want to support local fishermen by serving only seasonal, local commodities**



Final Recommendations

- **Consumers who patronize economy restaurants are price-conscious**
- **Diners at white table cloth restaurants will pay a premium for local seafood – make them your target consumers**
- **Owners stressed that fishermen take time to call on chefs and learn more about their product needs**
- **Chefs / owners want strong relationships with local seafood harvesters and dealers**