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# **SEAFOOD CONSUMPTION**

*National and Local  
Preferences*



## *Statistics*

- ◆ In 2007, Americans consumed \$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*
- ◆ Per capita consumption of seafood in the U.S. increased from 14.6 pounds in 1997 to 16.3 pounds in 2007 (*National Fisheries Institute*)



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## *Top Ten Most Popular Seafood Commodities* (National Fisheries Institute)

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- 1. Shrimp*
- 2. Canned Tuna*
- 3. Salmon*
- 4. Pollack*
- 5. Tilapia*
- 6. Catfish*
- 7. Crab*
- 8. Cod*
- 9. Clams*
- 10. Flounder*

Another favorite: *oysters*



## *Local Motions*

- ◆ The term “fresh” is still the most desirable food claim but *local, seasonal, handmade, and natural* are now used to convey freshness, high quality or authenticity.
- ◆ “Locally grown” topped the list of American Culinary Federation chefs hottest trends in 2007.
- ◆ “Food miles” – the distance a food travels from farm to table is, in part, fueling the local food movement.
- ◆ Local means “grown / harvested in my state.”



## *Local Motions*

- ◆ Consumers also looking for authentic products prepared in a “special place”, such as Copper River Salmon.
- ◆ Consumers believe local food is fresher, has less chemical contamination and is of higher quality.
- ◆ When it comes to food quality, 52% of consumers say they buy local whenever possible.
- ◆ Sustainability means wild-caught seafood: *one-quarter of consumers actively look for products that are better for the environment.*



## *Local Motions*

- ◆ Organic consumers are willing to pay premium for “fresh” food and *fresh* and *local* are synonymous.
- ◆ Sixty-one percent (61%) of consumers say they’re willing to pay a premium of more than 30 percent for fresh seafood.
- ◆ Seafood is among the top 10 fastest-growing organic categories in natural products retailers and was up 26.8 percent in 2008.
- ◆ USDA predicts seafood will have the largest per capita gains through 2020.



## *Balanced Nutrition*

- More protein in the diet
- Most seafood is high protein, low fat
- Omega-3 oils are heart-healthy: 65 percent of consumers connect omega-3s and heart health.
- Omega-3 oils seem to reduce memory loss in older adults.
- Seniors are twice as likely as any other age group to include foods in their diet that are rich in omega-3s.



## *Balanced Nutrition*

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





## *Balanced Nutrition*

- Sixty-nine (69) percent of Americans are pursuing a preventive lifestyle and 27 percent are taking a treatment approach to eating.
- Thirty-six (36) percent are trying to reduce the risk of developing a health problem, follow a doctor's advice (30%), or manage / treat a specific condition on their own (25%).
- Fifty-three (53) percent of adults are controlling their diet: weight (61%), cholesterol (36%), blood sugar (22%), high blood pressure (18%) and diabetes (14%).



## *Balanced Nutrition*

- Nine out of ten (88%) consumers believe it is important to eat foods that are naturally good nutrient sources vs. taking dietary supplements.
- Parents are choosing foods high in B vitamins and omega-3s for their children.
- Improving the cognitive ability in children and teens is fueling consumption of omega-3 foods.
- Twenty-eight (28) percent of children are overweight.



## *Healthy Eating*

- Three-quarters (76%) of adults and three in four teens are trying to eat healthier in restaurants.
- Local food is a stronger draw than natural or organic on menus; 40 percent of consumers say it is more important to buy local than organic.
- Americans are shifting away from specific diets and weight-loss plans by cutting back on amount of food consumed.
- Eighty-two (82) percent of consumers prefer to dine at restaurants with various portion sizes.



## *Healthy Eating*

- Nearly half (47%) of diners plan to order small portions in 2009.
- Smaller portions are critically important at a time when economic pressures are preventing some diners from visiting restaurants as frequently as in the past.
- Smaller portions have greater appeal among women and older consumers who traditionally have been more likely to order appetizers as a meal.



## *Consumers are time-starved*

- ◆ *Health, convenience, value, and taste* remain the key drivers of the food industry
- ◆ Generation Y: those age 14-27
- ◆ Generation X: those age 28-43
- ◆ Baby Boomers: those age 44-62
- ◆ Pre-boomers: age 63 +



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

- **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*
- **Shrimp and crab remain the overall best restaurant sellers:** *Grilled seafood sandwiches, shrimp on pizza, seafood quiche, seafood ravioli, seafood tacos*
- **Down-home fish appetizers:** *Tuna Salad on Pita Points; crab and shrimp samplers; steamed, bite-sized portions of clams, mussels, scallops, and oysters*



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

- *Shrimp* comprises more than half of shellfish entrees
- *Clam*/seafood chowders remain the best selling soups in fine-dining, casual-dining and hotel/motel restaurants
- Seafood salads featuring *shrimp* and salmon are growing in popularity
- Smoked fish dips and spreads as appetizer items



## *2005 NC Seafood Festival Survey*

- ◆ Total number of survey respondents: 175
- ◆ Eighty-four (84) percent expected seafood purchased at the coast to be locally caught.
- ◆ Ninety (90) percent expected seafood in local restaurants to be locally harvested.
- ◆ *Ninety-two (92) percent said they were inclined to purchase local seafood if given a choice.*
- ◆ Favorite commodities include *shrimp, flounder, scallops, oysters, and blue crabs*





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*2006 Survey by Dr. Susan Andreatta, UNC-Greensboro (NC Fishery Resource Grant 06-ST-02)*

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- ◆ Total number of survey respondents: 295.
- ◆ Favorite commodities (in descending order): *Shrimp, flounder, scallops, oysters, hard-shell crab*, tuna, grouper, soft-shell crab clams, snapper, bluefish and trout
- ◆ Among residents, home is the favorite place to eat seafood but 40 percent eat a seafood meal out at least once per week.
- ◆ Fifty-one (51) percent of day-trippers eat at least one seafood meal at a restaurant.



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*2006 Survey by Dr. Susan Andreatta, UNC-Greensboro (NC Fishery Resource Grant 06-ST-02)*

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- ◆ Fifty-one (51) percent of day-trippers eat at least one seafood meal at a restaurant.
- ◆ Thirty-three (33) percent of visitors staying one week ate one seafood meal at a restaurant.
- ◆ Thirty (30) percent of visitors staying one week eat at least two seafood meals at a restaurant.
- ◆ *Eighty-three (83) percent of respondents were willing to pay a price premium for local seafood at restaurants.*



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*2006 Survey by Dr. Susan Andreatta, UNC-Greensboro (NC Fishery Resource Grant 06-ST-02)*

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- ◆ Seafood for home consumption is purchased at seafood markets (32%), roadside stands (16%), from fishermen (16%), and at grocery stores (15%).
- ◆ *Eight-four (84) percent of respondents said it was important that the seafood they were eating in the area be locally harvested.*



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*2007 Carteret County Survey by Dr. Rita  
O'Sullivan, UNC-Chapel Hill*

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- ◆ Total number of survey respondents: 57
- ◆ Favorite commodities (in descending order): *Shrimp, scallops, flounder, oysters, blue crab*, grouper, tuna, clams, and snapper
- ◆ Respondents specifically asked for local seafood at restaurants (72%), at seafood retailers (79%) and at supermarkets (26%)
- ◆ Respondents patronized restaurants (68%), seafood retailers (77%), and supermarkets (16%) that serve local commodities



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*2007 Carteret County Survey by Dr. Rita  
O'Sullivan, UNC-Chapel Hill*

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- ◆ Prior to completing the survey, 40 percent of respondents had heard of Carteret Catch.
- ◆ *Ninety-five (95) percent of respondents state they would buy Carteret Catch seafood if it were available in other North Carolina markets.*



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*2008 NC Seafood Festival Survey by Dr. Amy  
Anderson, UNC-Chapel Hill*

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- ◆ Total number of survey respondents: 339
- ◆ Ninety-one (91) percent prefer to purchase local seafood over imports when given a choice.
- ◆ Ninety-eight (98) percent believe local seafood is of higher quality than imported seafood.
- ◆ Ninety-eight (98) believe that local seafood is safer than imports.



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*2008 NC Seafood Festival Survey by Dr. Amy Anderson, UNC-Chapel Hill*

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- ◆ Ninety (90) percent said they are willing to pay a premium price to ensure the seafood they buy is of local origin.
- ◆ Seventy-nine (79) percent purchase local seafood because marine stocks are managed for sustainability by state and federal regulators.
- ◆ Eighty-seven (87) percent say they purchase local seafood because harvesters and processors comply with federal and state rules that monitor food quality and safety.
- ◆ Ninety-four (94) percent choose local seafood because doing so supports local fishing communities.



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*2008 NC Seafood Festival Survey by Dr. Amy Anderson, UNC-Chapel Hill*

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- ◆ Eighty-one (81) percent of respondents expect restaurants to serve local seafood, 80 percent expect seafood retailers to sell local products and 44 percent expect supermarkets to sell local seafood.
- ◆ Sixty-four (64) percent of respondents ask restaurants if the seafood they serve is local, 68 percent ask seafood retailers to identify local products on their counters, and 40 percent ask supermarkets to identify local seafood in their display cases.





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## *2008 NC Seafood Festival Survey by Dr. Amy Anderson, UNC-Chapel Hill*

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- ◆ *Sixty-six (66) percent of respondents say they patronize restaurants that make an effort to serve local seafood, 71 percent buy from retailers that sell primarily local products, and 30 percent select for grocery markets that offer local seafood.*
- ◆ *Fifty-seven (57) percent of respondents buy local seafood at restaurants, 80 percent buy at seafood retail markets and 40 percent buy local seafood at supermarkets.*