



International Markets Bureau AMERICAN EATING TRENDS REPORT

SHELLFISH

Unless otherwise stated, all of the information in this report was derived from the NPD Group's National Eating Trends Database (U.S.), updated to November 2010, and reflects the eatings (defined by NPD as the number of times any particular category/item is eaten by an individual in a specified location or time period) of a product at home or carried away from home as a base dish. These figures do not reflect purchases of food products made through foodservice establishments, or the consumption thereof. NPD monitors the eating habits and attitudes of American consumers by surveying 5000 individuals reporting on 14-day's continuous consumption of all meals and snacks.

CONSUMPTION DEMOGRAPHICS

- ▶ According to the United States Department of Commerce and the National Marine Fisheries Service, per capita consumption of fish and shellfish was 15.8 lbs in 2010, of which fresh and frozen shellfish accounted for 5.3 lbs.
- ▶ Households with an income of over US\$70,000 represented 40% of shellfish consumers in 2010, followed by households with an income between US\$10,000 and US\$29,999.
- ▶ Two-member households represent 42% of all shellfish consumers, and reported more shellfish eatings than any other household size.
- ▶ Over 60% of shellfish consumers were homemakers* aged 45 and older.
- ▶ About 60% of shellfish consumers were employed.
- ▶ Of the Americans that reported consuming shellfish, 40% were college graduates, 29% had some college, and 25% had a high school degree as their highest level of education.
- ▶ White/Non-Hispanic Americans represented 82% of total shellfish consumers.



Core Markets (at least 20% above average consumption rate)

- ▶ American adults aged 65 and over are the most developed shellfish market.
- ▶ Men aged 65 and older report higher eatings of shellfish than women in the same age demographic.

Underdeveloped Markets (at least 20% below average consumption rate)

- ▶ Male consumers between the ages of 18 and 54.
- ▶ Women between the ages of 18 and 34.
- ▶ Children between the ages of 13 and 17.

CONSUMPTION CALENDAR

- ▶ When consumed at home, shellfish was eaten as a main dish on 80% of meal occasions. Shellfish was eaten less frequently as an appetizer (6% of meal occasions) and a side dish (5%).
- ▶ Shellfish dishes were consumed primarily for dinner (75% of meal occasions), followed by lunch (21.4%).
- ▶ The preferred day for consuming shellfish was Fridays (19.7% of eatings) followed by Thursdays and Sundays.
- ▶ Overall, shellfish was preferred during the winter and spring months (December to May).

*The "homemaker" is defined by NPD as the head of the household or the primary food shopper, who is typically female.



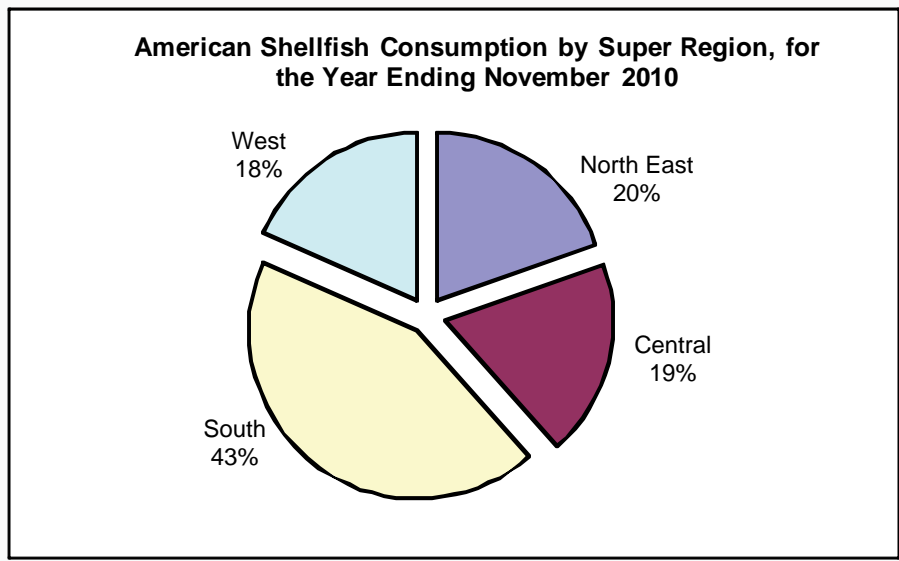
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PREPARATION METHODS

- ▶ When consumed at home, shellfish was prepared warm 76% of the time. The stove top was the most popular warming method, used on 32.4% of occasions, with the oven (19.6%), the microwave (10.4%) and the broiler (2.4%) rounding out the top four.
- ▶ Consumers reported eating raw shellfish on just 1.7% of meal occasions.
- ▶ The remaining preparation methods (22%) were not specified, but it is assumed to represent shellfish eatings that were “prepared” but not “cooked,” perhaps as sushi or ceviche.

CONSUMPTION BY REGION

- ▶ Consumers from the Southern region (defined below) reported the highest number of shellfish eatings compared to their regional counterparts, representing 43% of total U.S. shellfish consumption over the period.
- ▶ When further broken down into sub-regions, consumers in the South Atlantic states reported the highest proportion of eatings, representing 25.6% of total U.S. shellfish consumption over the period.
- ▶ The least amount of shellfish consumption was reported by the Western states, representing 18% of total U.S. consumption.



American States by Super Region and Sub-Region

<p>WEST</p> <ul style="list-style-type: none"> • <i>Pacific:</i> Washington, Oregon, California • <i>Mountain:</i> Montana, Idaho, Wyoming, Nevada, Utah, Colorado, Arizona, New Mexico 	<p>NORTH EAST</p> <ul style="list-style-type: none"> • <i>New England:</i> New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut • <i>Mid-Atlantic:</i> New York, New Jersey, Pennsylvania
<p>CENTRAL</p> <ul style="list-style-type: none"> • <i>West-North-Central:</i> North Dakota, South Dakota, Iowa, Kansas, Nebraska, Minnesota, Missouri • <i>East-North-Central:</i> Wisconsin, Michigan, Illinois, Indiana, Ohio 	<p>SOUTH</p> <ul style="list-style-type: none"> • <i>West-South-Central:</i> Oklahoma, Texas, Arkansas, Louisiana • <i>East-South-Central:</i> Kentucky, Tennessee, Mississippi, Alabama • <i>South Atlantic:</i> West Virginia, Virginia, North Carolina, Georgia, South Carolina, Florida



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CANADA – U.S. TRADE

- ▶ Canadian shellfish exports to the U.S. totalled just over C\$232 million in 2010.

Canadian Shelfish Exports to the United States, 2010	
HS Code and Commodity Description	C\$
160530 - Lobster	163,862,873.00
160510 - Crab	27,952,411.00
160520 - Shrimps And Prawns	22,388,370.00
160590 - Molluscs, etc.,	10,208,844.00
160300 - Extracts and juices of meat, fish, or crust, molluscs or other aquatic invertebrates	7,529,902.00
160540 - Crustaceans, Other	931,412.00
Total	232,873,812.00

Source: Global Trade Atlas, 2011.

NEW PRODUCTS

- ▶ According to the Mintel Global New Products Database (2011), 108 new products with a shellfish ingredient were introduced to the American market between November 2010 and November 2011. The following are some examples:



Tryst Sea Dips Cajun Crab Dip is a premium imitation crab in a blend of cajun spices and herbs.

Joe's Crab Shack Eat At Home Parmesan Panko Shrimp is comprised of shrimp with a light Parmesan breading and herb marinara sauce. This partly microwaveable product retails in 9-oz. pack. Its positioning claim is "microwavable"



Margaritaville Jammin' Jerk Shrimp has been repackaged. The extra large shrimp claims to be seasoned with Jamaican spices from the Margaritaville chain of restaurants. Positioned as "ethical - environmentally friendly package."

Kroger Wild-Caught Sea Scallops are now available in a re-sealable package. Positioning claims include "convenient packaging."

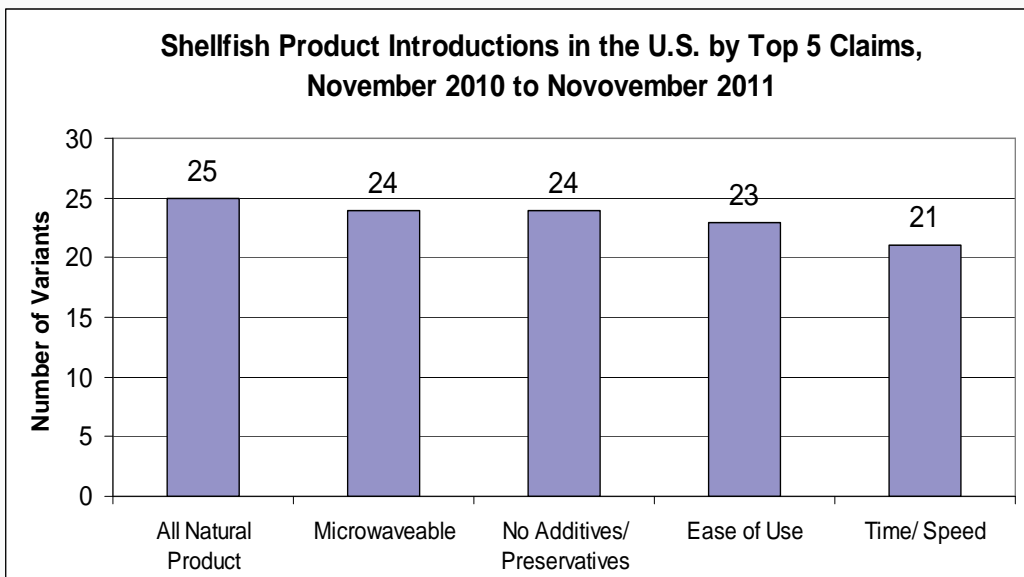




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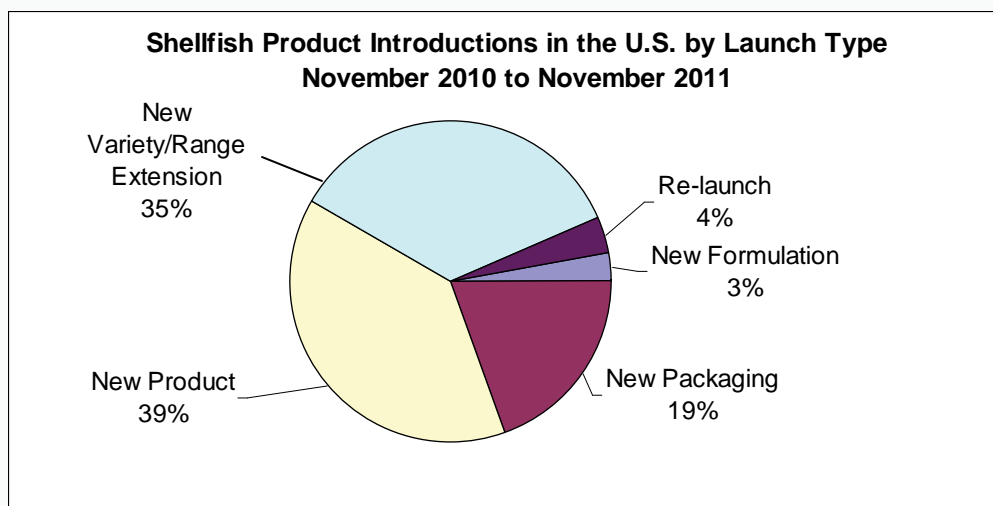
NEW PRODUCT POSITIONING

- ▶ Amongst the new products released from November 2010 to November 2011, “all natural product,” “microwavable,” and “no additives/preservatives” were the top three claims.
- ▶ “Ease of use” and “time/speed” rounded out the top five claims, while “premium” was also fairly popular.



Source: Mintel, 2011.

- ▶ New products (39%), new variety/range extension (35%), and new packaging (19%) accounted for the majority of the 108 launches between November 2010 and November 2011.



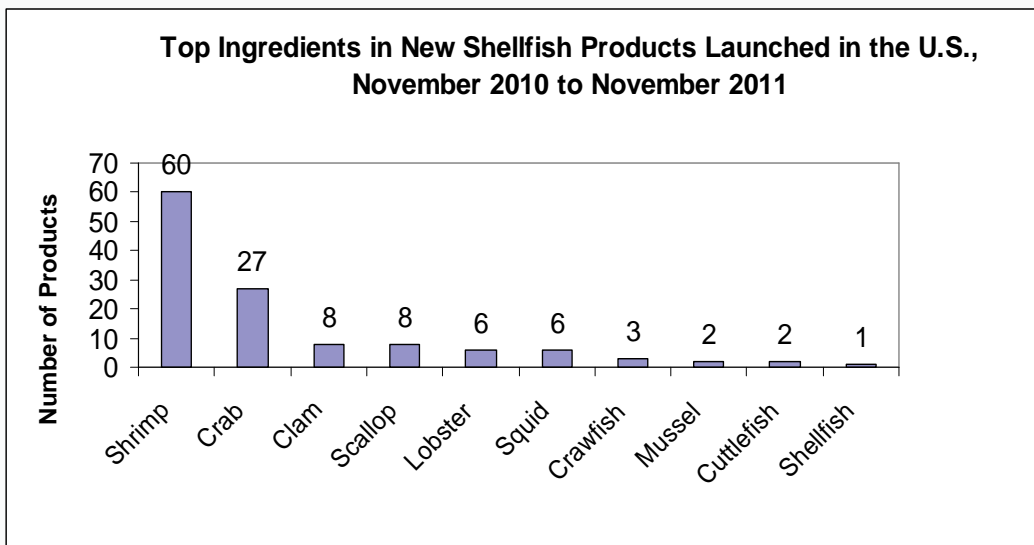
Source: Mintel, 2011.



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NEW PRODUCT INGREDIENTS

- ▶ All of the new products launched on the U.S. market between November 2010 and November 2011 contained various shellfish ingredients.



Note: When added together, the product totals for each ingredient will be more than the total number of new product releases (108), reflecting multiple ingredients per product.

Source: Mintel, 2011.



Source: Shutterstock.



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MARKET OPPORTUNITIES

Key Markets to Retain (targeting those currently reporting high consumption rates)

- ▶ Americans aged 65 and older, higher income households, two member households, single family homes, and white/non-Hispanics are considered to be the main consumers of shellfish products. The preconceived notion that shellfish is expensive could be discouraged by offering product promotions and featuring lower-priced shellfish that would attract lower income households. Easy to prepare meals that comply with the “time speed” and “microwaveable” claims that were highly popular amongst new shellfish products, could attract higher member households.

Possible New Opportunities (targeting those currently reporting low consumption rates)

- ▶ Adults aged 18 to 54, particularly men, children aged 13 to 17, and non-white Hispanics currently report low shellfish consumption rates. Products aimed at children under 13 years old such as pop-corn shrimp, could attract families with younger children. Mid-range household incomes could be encouraged to buy more shellfish with discounted products. Ethnic sauces and dip pairings could increase consumption amongst non-white Hispanic consumers.

Other Opportunities to Consider

- ▶ A survey from Mintel (2010) revealed that fish/shellfish consumers consider freshness, appearance and price when buying these products. Consumption amongst wealthier households may benefit from fresh rather than frozen shellfish products. In-store displays that promote cleanliness and freshness (i.e., no fishy odour) could also attract higher income consumers. Packaging that highlights these characteristics could further promote higher consumption of shellfish products.
- ▶ Consumer concerns about the depletion of fish stocks, sustainable harvesting practices, as well as animal welfare and eco-friendliness could be alleviated by promoting products that participate in well managed fisheries, dolphin or turtle friendly operations, have Marine Stewardship Council accreditation, and are labelled accordingly.

KEY RESOURCES

Datamonitor (2011).

Global Trade Atlas (2011).

Mintel Global New Products Database (2011).

The NPD Group (2011). National Eating Trends database for the year ending November 2010.

Fisheries of the United States (2011). National Oceanic and Atmospheric Administration. Retrieved from: [http://www.st.nmfs.noaa.gov/st1/fus/fus10/FUS_2010.pdf]

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