

# Fish Welfare: Insights and Opportunities



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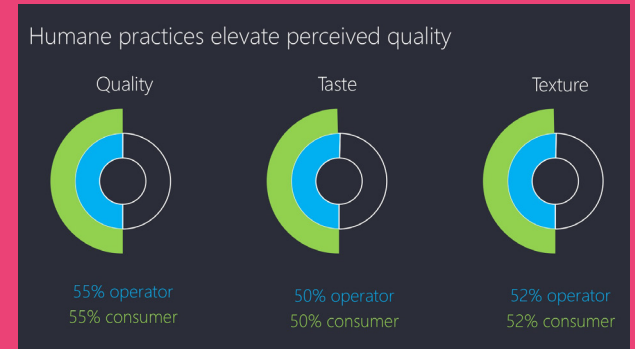
Americans are poised to make a dramatic change in how we eat, and humanely produced fish and seafood may be the missing ingredient.

A quarter of adults want to reduce the amount of meat we eat today. That includes nearly one out of six adults who today consider themselves meat eaters and want to eat less meat in the future. Americans are now on trend to eat 25% less meat by 2025.

The top choice for replacing it: more

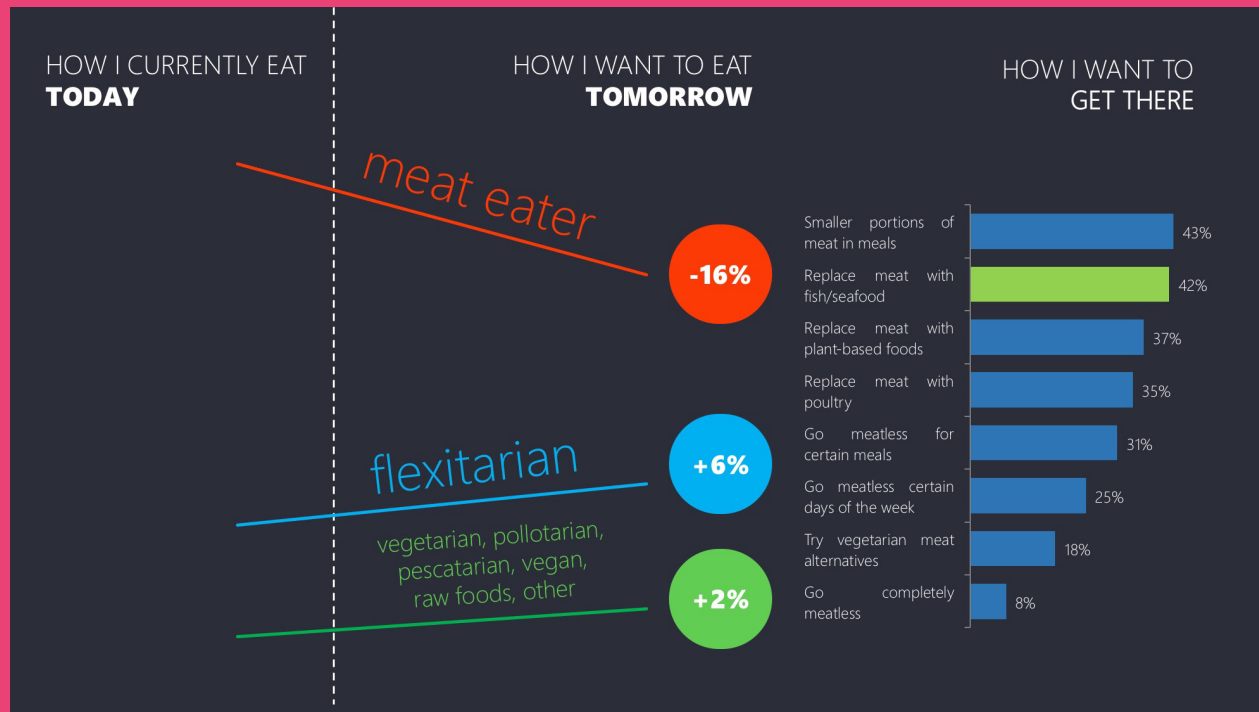
fish and other types seafood. That's not entirely surprising as we're regularly told to eat more fish and seafood as part of a healthy diet, though currently only consume about half as much as is recommended. U.S. production, import and consumption of farmed fish and seafood all continue to increase.

But consumption hasn't grown all that much at a time when so many consumers are in favor of eating more fish and seafood compared to other protein choices.

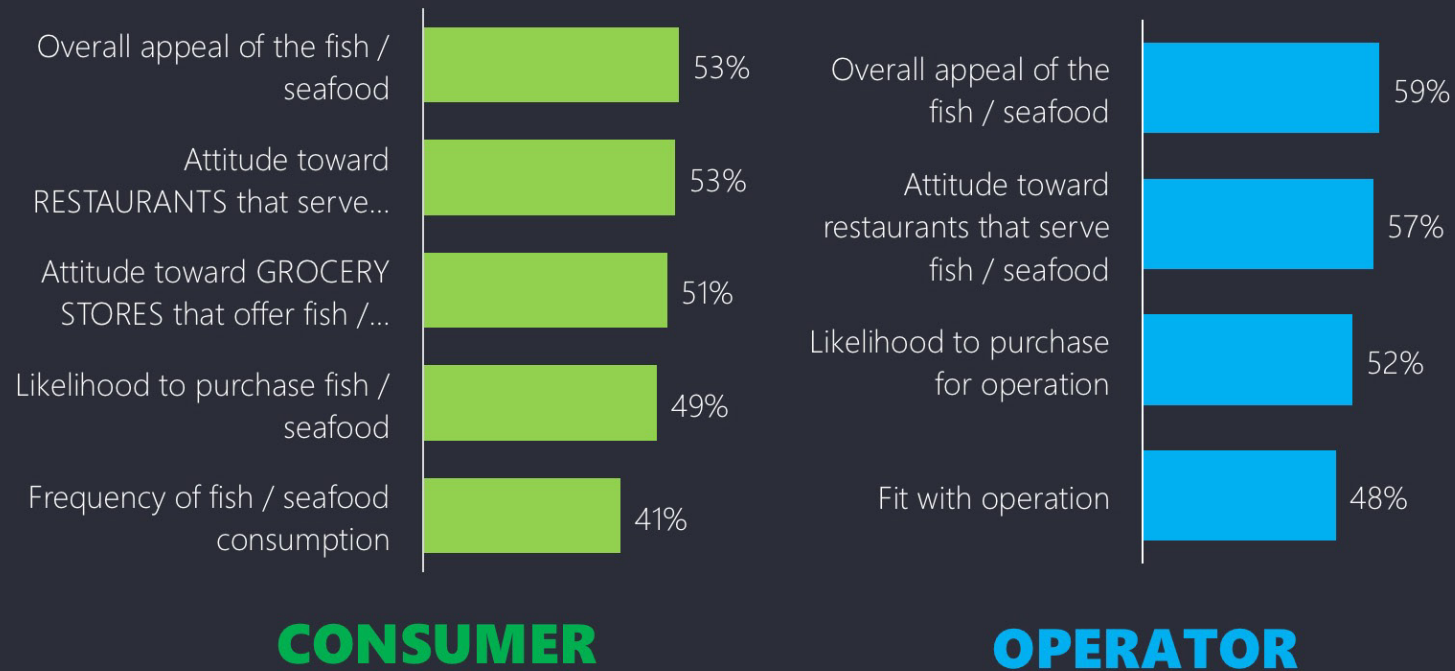


Adopting higher animal welfare standards in fish and seafood production, including reducing the use of antibiotics, are moves that directly address consumer and operator concerns. They may be the key to increasing fish and seafood consumption and also improving the perception of farmed fish and seafood.

Over half of all consumers and operators believe that more humane production practices result in better quality fish. Equal numbers of consumers and menu and purchasing decision makers believe that adopting higher animal welfare standards in fish farming improves both taste and texture.



# Humane practices enhance appeal among both groups



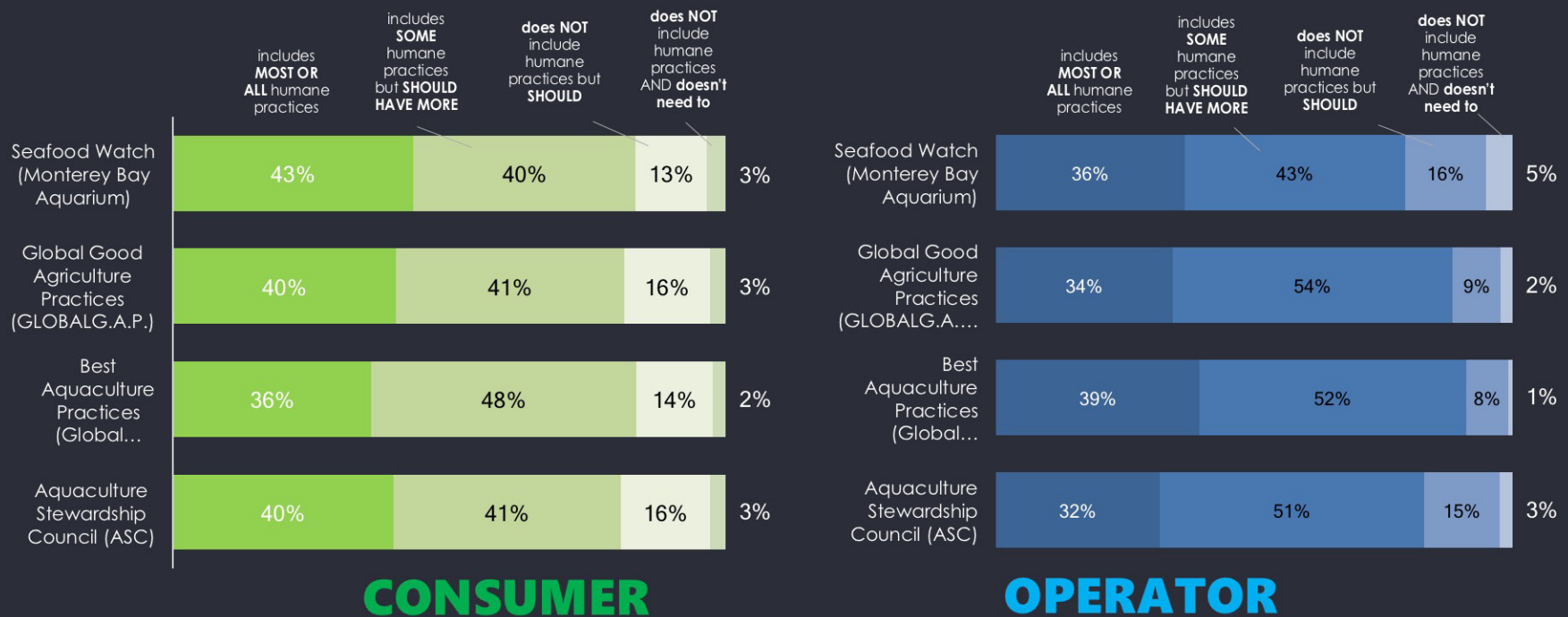
Farming fish and seafood using more humane practices also increases interest in purchasing fish and seafood overall. About 40% of consumers say they will eat fish and seafood more often if it is humanely produced, and more than half of

consumers also say they have a better attitude about both restaurants and grocery stores that sell humanely produced fish and seafood. Operators may already know this, with many stating that humanely raised fish and seafood is a good

fit with their operation. Casual dining operators are even more likely to believe that serving humanely raised fish and seafood will increase appeal at their restaurants.



# Most consumers and operators believe that major ratings and certification include humane practices

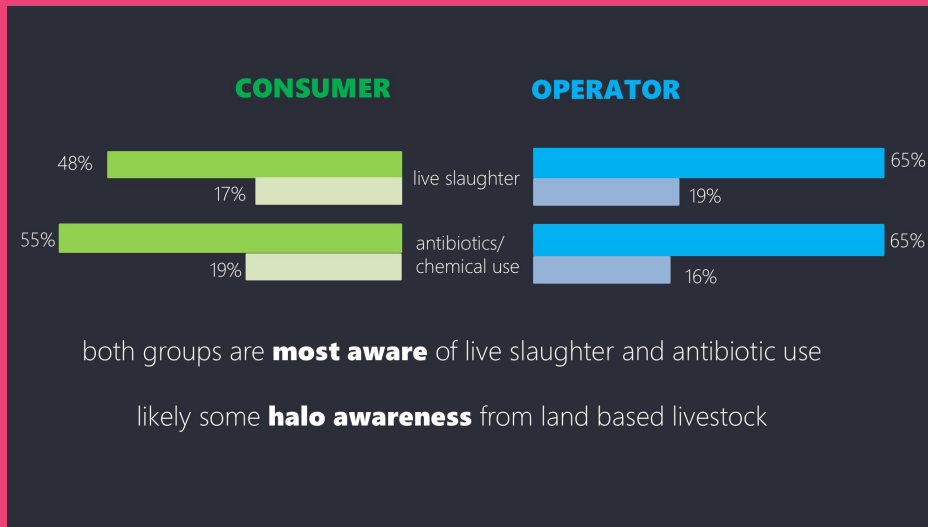


But they are looking for ways to confirm that fish and seafood is humanely treated. More than half believe that popular sustainability

rating and certification programs include humane product standards, and nearly 4 in 10 are interested in a specific guarantee that fish and

seafood is humanely farmed or caught.

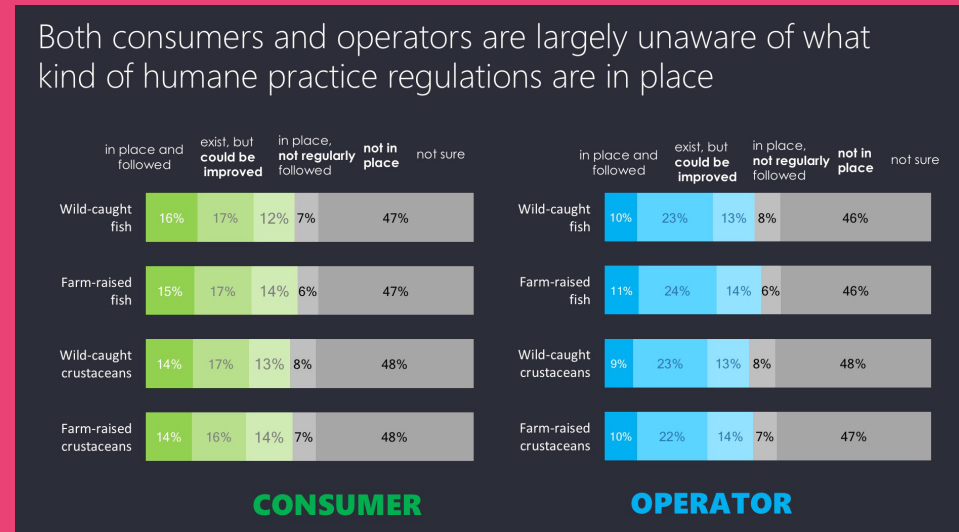




Animal welfare is a driving force in deciding which proteins to eat. We're concerned about farmed fish and seafood primarily because of slaughter methods and antibiotic use, with half of consumers and 2/3 of restaurant operators aware of each practice. However, few from either group are very familiar with broader aquaculture practices (transport, etc.). And, about half of consumers and 40% of operators continue to have a preference for wild-caught fish and seafood.

All this points to a great opportunity for chefs and restaurants as well as grocers to increase the sale of fish and seafood. Offering humanely produced fish and seafood provides consumers with an attractive way to follow through on their desire to eat less red meat and more fish and seafood. It can also make your business and brand more attractive. For restaurants that feature fish and seafood, it can be a way to drive traffic and draw a share of those who are likely to eat fish and seafood more often if it is humanely raised.

Uncertainty about how fish and seafood is farmed also may be an obstacle to purchasing. More than half of purchasing and menu decision makers as well as consumers are not sure what kind of animal welfare standards are in place or required, or believe that none exist or are regularly followed.



Many purchasing decision makers already recognize the benefits of humanely raised fish and seafood, both as a fit for their operation and also as an indicator of better flavor and quality. So, the seafood industry also has an opportunity to increase sales by adopting higher animal welfare standards. Avoiding the use of antibiotics and adopting more humane slaughter practices, as well as other improvements, can make farmed fish more attractive compared to wild-caught fish and seafood and other protein choices.

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# Changing Tastes

is a values-driven consultancy firm that provides business strategy and culinary consulting to Fortune 500 companies, growth stage restaurant and hospitality firms, investors, and the philanthropic sector. Through its work, the firm has created more than \$2B in value for its clients while catalyzing some of the most significant changes in the US food industry including reaccelerating growth in the natural and organic food industry by developing a new marketing strategy focused on personal health benefits, helping the leading US restaurant companies address antibiotic use in livestock production, and pioneering the now popular plant-forward dining strategy.

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# Datassential

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