

# What trends offer opportunities or pose threats to the European fish and seafood market?

The European fish and seafood market was experiencing rapid growth in the first months of 2020. However, the appearance of COVID-19 stopped this positive trend and started a new period of challenges and uncertainties. Your business learning to adapt to this new reality could be an essential ingredient to success. In this article, we will show the trends that offered opportunities or posed threats to the European seafood market before COVID-19, and those that have only become relevant since the coronavirus crisis.

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## 1. European fish and seafood market before the corona-crisis

The communication of sustainability, certification, transparency, health and romantic origin stories are trends that allow producers to ask a premium price for their fish and seafood products. They, along with mergers and acquisitions, pushed the industry's growth in 2019 and the beginning of 2020. At the same time, bigger companies and international company groups drive hard price bargains and negative trends, like mislabelling, put pressure on the bottom line of producers. Being aware of these trends can help you find your way into the European Market.

## 2. Sustainable certified fish and seafood continues to gain market share

European and United States retailers are leading the trend of only selling sustainably certified seafood. For a long time in Europe, this trend was limited to Northwestern Europe and the Nordic countries. In 2019, however, Southern and Eastern Europe continued the recent strong growth in their sustainably certified seafood offering. The COVID-19 pandemic has created some distrust in food, among consumers. It is very likely that sustainability and traceability will become increasingly important for fish and seafood, as consumers trust certified products more.

There are many sustainability certifications out there, but the [Marine Stewardship Council \(MSC\)](#) and the [Aquaculture Stewardship Council \(ASC\)](#) are the main ones to which European retailers have committed for wild caught and aquaculture fish and seafood. Figures 1 and 2 show the growth of these two certification schemes over the last two years.

In financial year 2018/2019, around 805,000 tonnes of MSC-certified seafood were sold on the European market, compared to about 720,000 tonnes in 2017/2018. This is an increase of 12%. MSC-certified products include whole fish and fish fillets, crustaceans (mainly cold water shrimp), and canned fish (mainly tuna). Increasingly,

other products that include fish and seafood, such as pet food and shrimp crackers, are also sourcing sustainably certified fish and seafood.

Northwestern Europe and Scandinavia still account for the largest share of the European sales of MSC-certified fish and seafood, with a volume of about 670,000 tonnes. After Germany and the United Kingdom, France has now become Europe's third largest market for MSC products, taking over from the Nordic block (Denmark, Finland, Iceland, Norway and Sweden), which MSC collects data for as a group.

The 12% growth in the volume of MSC-certified seafood sold was mainly accounted for by Southern Europe. The volume of MSC products sold in France grew by 56%, Italy by 30% and Spain and Portugal by 27%. Although still small, Eastern European countries doubled their sales of MSC-certified products to around 50,000 tonnes.

ASC was founded much later than MSC but is rapidly growing and catching up. In May 2020, there were 1266 ASC-certified farms, and another 183 in assessment, most of which are expected to be certified soon. At the start of 2020, these farms and their supply chain partners brought almost 24,000 types of ASC-certified products to the European market. This is an increase over 50%, compared to a year before.

In terms of geography, ASC is rapidly expanding the amount of product available in markets all over Europe. Looking at year on year growth figures, Northwestern Europe increased sales of ASC-certified products by 50%, Southern Europe by 71% and Eastern European sales more than doubled between May 2018 and 2019. The biggest markets within Northwestern Europe, Southern Europe and Eastern Europe are Germany, France and Poland, respectively.

ASC currently certifies farmed salmon, pangasius, tilapia, shrimp, sea bass/sea bream/meagre, trout, bivalves, abalone, seriola/cobia, tropical marine fish and seaweed.

Although general consumer awareness about sustainability has played a role in the development of MSC and ASC, the main factor is the commitment that international retail groups have made at the corporate level. While their commitments originated from consumer demands in Northwestern Europe, or in some cases the United States, they now require their group companies in other markets to meet the same targets.

In practice, this means that all seafood on offer in their product range has trustworthy certifications that are recognised by the Global Sustainable Seafood Initiative (GSSI), a global initiative that benchmarks seafood sustainability standards. GSSI recognised certifications include ASC and MSC, but also others like [Best Aquaculture Practices \(BAP\)](#) and [Global GAP](#).

Once the international retail groups introduce certifications to a new market, other food service and retail companies must offer certified products to remain competitive. As a result, within a couple of years, we expect that the majority of fish and seafood sold in Southern European retail and institutional food service, just like in Northwestern Europe and the Nordic countries, will be sustainably certified.

[Ahold Delhaize, Europe's fourth biggest retailer](#) with European supermarkets in the Netherlands, Belgium, Luxembourg, Czech Republic, Serbia, Romania and Greece, as well as the United States and Indonesia, is an example of a retail company that has made a group-wide commitment to sourcing sustainable seafood. On its website, Ahold Delhaize explains that [they are working hard to make sure that all fish and seafood sold under their private label is sustainably sourced](#).

If certification is not available for specific species (which is the case for certain species among the products they offer in Central and Southeastern Europe), they work with civil society partners like WWF to take a close and critical look at the supply chains of those products. Together, they ensure that Ahold Delhaize does not source seafood that has a negative effect on people or the environment.

A criticism of ASC and MSC is that their standards are not readily applicable for small-scale producers. Some small-scale producers lack the capacity to implement standards at the fishery or farm level and it is often too difficult to organise the farmers in such a way that ensures chain of custody. However, ASC and MSC are making their standards increasingly accessible to small-scale fisheries and aquaculture operations, making it easier and more affordable for small-scale producers to gain certification.

### Tips:

If your aquaculture products are not already certified, follow ASC to understand certification requirements and options for support in getting certified. ASC shares a lot about the [ASC standards](#), [group certification](#), and the [ASC improver programmes](#) and publishes a [monthly ASC certification update](#).

If your wild caught products are not already certified, follow MSC to help you to understand the requirements of and potential for support for certification. MSC shares a lot about [the MSC fishery certification guide](#) and [capacity building programme](#). Learn about the growth and market expansion in [MSC's annual report 2018-2019 \(page 32\)](#) to learn about MSC's expansion from 2000 to 2019.

Read the [CBI Market Statistics and Outlook](#) study for a greater understanding of regional definitions differences in their consumption and import patterns.

Ask your customer about their sustainability certification requirements. When possible, partner with the importer and gain their support in becoming certified; check [what Ahold Delhaize says about the importance of sustainability](#) for their fish and seafood assortment as an example of what will be required for a growing number of your potential partners.

Do not look at MSC, ASC and other certifications as a means to get a premium price for your product, look at it as a market access requirement for Europe's retail market.

Take a closer look at the [Global Sustainable Seafood Initiative](#) and their benchmark of sustainable seafood standards. It will help you to decide which certification standards to consider when you want to access the European market.

## 3. Storytelling: Purchases that empower

The new generation of European consumers care about the story behind your products. Whether it is a story about the health benefits of your products or the sustainability of your production methods. Particularly if your client is in retail and your packaging reaches the end consumer, your story adds value. These consumers have an appetite for authentic, healthy, and sustainable products. In a crowded marketplace, your story may allow you to attract more consumers to your product and increase your margins.

To tap into this trend, you must think about your product and the story that it tells. This story can be about the production practices used, the type of producers that are involved or even the health benefits of your products. Imagine the romantic image of a happy but small-scale farmer who sustainably breeds tilapia. Imagine how seeing this image on a package appeals to the emotions of the end user, as they choose between one tilapia fillet and another.

There are several ways to develop a story around your product. You can do this together with your client, taking advantage of their intimate market knowledge. Or, you can collaborate with other producers in your area to develop a joint brand or a campaign for your products. It all starts with you looking at the unique selling points that exist in your company and the products that you sell.

Klaas Puul is a shrimp importer that works with their source companies and applies origin branding to one of its product lines (figure 3). This company achieves product premiumisation by displaying the name of the country of origin and an image that represents that country on each package. On shrimp from Guatemala, for example, the image features a volcano and temple. How romantic is that?

By setting its South American shrimp products apart from its Asian competitors, Klaas Puul may be able to sell the product at a slightly higher price, making it possible to source the higher priced products that come from this region. Without this effort, it is unlikely that their clients would be willing to pay a higher price for this product and would require Klaas Puul to source from cheaper origins. Klaas Puul, therefore, seeks out producers, like you, to develop these stories and bring products to market.

Figure 3: recently introduced retail product line for shrimp from Klaas Puul



Source: Undercurrent (2019)

The One-by-One Indonesian tuna branding initiative, on the other hand, is made up of a group of Indonesian tuna exporters who have developed a joint production method-based brand (see figure 4). This is another example of storytelling being successfully employed to conquer space in the market. This group of companies have a similar ambition and can achieve product premiumisation by uniting to position their products as a high-end brand in the market.

One-by-one tuna branding focuses on highlighting Indonesia's long-standing tradition of pole- and line-caught skipjack and handline-caught yellowfin tuna. The [brand website](#) promises a product that is superb in quality and sustainable by tradition. Products sold under the brand are sold in a universal package, which shows the brand logo and slogan and carries a deep blue colour. It sets participating companies apart from other tuna producers.



The one-by-one Indonesian tuna website allows the visitor to read the story and commitments behind the brand, as well as find facts and figures, and suppliers that can sell the brand. In the website's [suppliers list](#), it becomes clear that 40 companies in Indonesia can supply this brand.

Figure 4: a picture used in the promotion of One-by-one Indonesian Tuna



Source: [indonesiantuna.com](http://indonesiantuna.com) (2019)

It is important to understand that the stories these companies tell about their products are true. This is not a fairy-tale. They have looked at the unique selling points of their producers and have tried to (simply) communicate this on the package. If you cannot guarantee that the story is true, it is better not to tell the story at all. Certifications are a way of providing evidence for your claims. The emergence of these brands is further evidence of the increasing importance of storytelling in branding and strengthens the growing trend of certified products gaining popularity.

### Tips:

Develop a story around your brand when selling to markets in which the consumer sees your packaging; think about the retail and wholesale market. Even in the business to business (B2B) market, your brand story can give you an advantage over your competitors.

Start telling your company's story now. Though it is not a market entry requirement yet, it is a growing trend and is becoming increasingly important to the end user. Get ahead of your competitors.

Take inspiration from other companies successfully telling stories to create a brand identity.

Check the [Fish Tales brand](#), a major sustainable seafood brand in Northwestern Europe, which tells the story of the producers of the seafood in their product range on packaging and online.

Check the [Selva Shrimp](#) brand, which tells the story of mangrove-friendly shrimp farming to set its product apart from other sustainable shrimp.

Check the website of [German-Vietnamese seafood company, Binca](#) who tries to set its products apart through storytelling in online and offline communication materials.

## 4. 'Out-of-home market' more committed to sustainable certified fish and seafood

For quite some time, sustainability has been something that was mainly a requirement in the retail sector, where the product is marketed and sold directly to the consumer. In the retail market, a company's reputation is more at risk. Wholesalers, selling to the food service sector, on the other hand, claimed that restaurant chefs did not care that much about sustainability and that the clients eating at the restaurant were not asking for it. They argued that the chef would say that sustainability is important, but the price is leading. Well, this is changing.

Typically, it takes about five years for a trend in retail to also gain traction in the 'out-of-home' sector. This has proved to be true for sustainable seafood. In Northwestern Europe, restaurant chefs are increasingly becoming aware that consumers want to know that what they eat is sustainable. Although it is a slow movement, in recent years, an increasing number of restaurants market themselves as only selling sustainable seafood.

Furthermore, the claims that restaurants in Northwestern Europe make about the sustainability of their seafood often goes beyond certification. In this area of Europe, restaurants often sell different kinds of fish than is stocked by their retail counterparts, some of which are not available certified. In those cases, restaurants tend to commit to only selling seafood that has a recommendation in a seafood guide, such as the [Good Fish Guide](#).

The Netherlands-based [Good Fish Foundation](#), the organisation behind the Good Fish Guide, works actively with restaurants and creates campaigns to convince consumers that it is possible to work exclusively with sustainable seafood. The Good Fish Foundation knows, from experience, that once the chefs are convinced and ask for sustainable fish and seafood, wholesalers will start to expand their offerings. A growing number of smaller fish and seafood wholesalers, like the Netherlands-based [Ecoseafood](#), are specialised in selling sustainable seafood.

Even if the increased demand for sustainable seafood is not driven by demand from chefs or restaurant visitors, if the prices of certified-sustainable fish and seafood come down to more or less the same level as their conventional competitors, wholesalers may suddenly decide to start selling more certified seafood. A recent example is one of the largest Dutch wholesalers, [Sligro](#). During the price slump of Pacific white shrimp, they suddenly requested that their shrimp supplier, Fisherman's Choice, start supplying ASC-certified Pacific white shrimp only.

We believe that the growing trend of demanding more sustainable seafood in wholesale will spread in the same way as this trend has in retail. In a couple of years, the demand for sustainable seafood will have increased across the European wholesale market. Though this topic might not seem relevant to you if you do not currently supply retail, if you want to be ahead of your competitors, you had better start looking at how sustainable your fish and seafood is now.

Since COVID-19 closed much of the food service industry during the lockdown measures, and this sector is only just starting to reopen, it is uncertain what will happen and how it will recover. The trend towards more sustainable products in food service, however, is likely to continue. As mentioned before, there is an increasing demand from consumers for more sustainable products. This will support the continued development of the food service industry, towards an increased commitment to more sustainable fish and seafood.

## Tips:

Check whether your product is recommended as a responsible choice in the [Good Fish Foundation's Good Fish Guide in the Netherlands](#) or the [Marine Conservation's Good Fish guide in the United Kingdom](#).

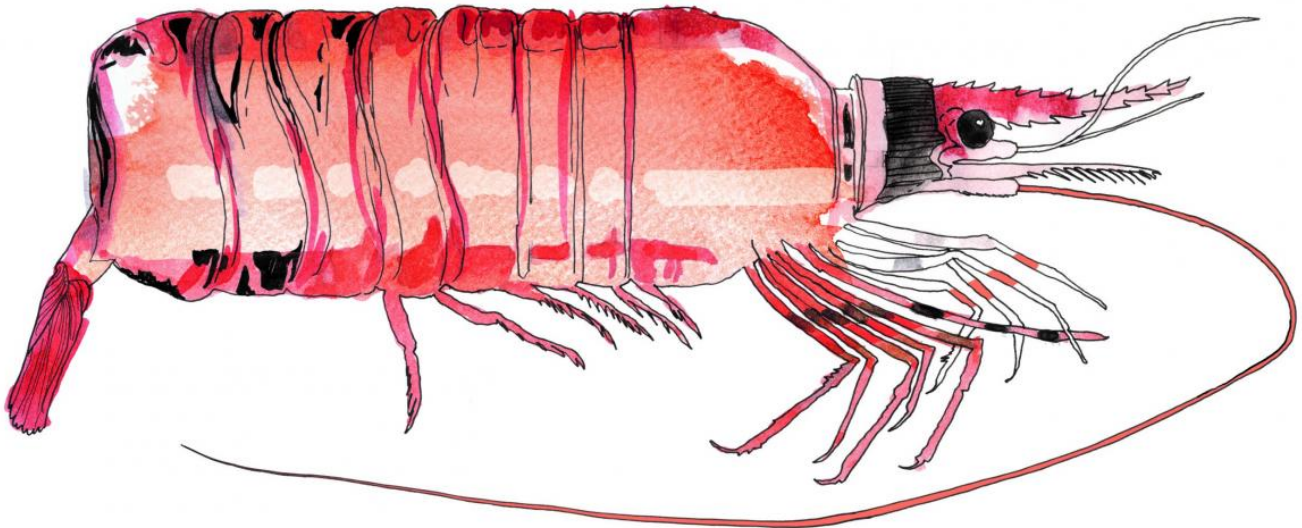
Use [Google Translate](#) if you are trying to access a company website linked in this study and the website is not available in a language you are familiar with. Companies that you might be interested in may only have their websites translated into the languages that they use most often.

Check the menu of [Bagels & Beans](#), a Dutch franchise with over 80 locations who offer "Fish Tales" smoked salmon. [Fish Tales](#) is an origin story-based brand that was retail-focused but has entered food service.

## 5. Mislabeling creates unfair competition

Northwestern Europe is the primary market for fish fillets and peeled shrimp. These products are sensitive to malpractices such as the mislabelling of the quantity of added water through glazing and soaking. Although glazing and soaking both have their role to play in terms of moisture retention during processing and storage, both practices are also used to manipulate the price of the product. The more water in the product or around the product, the more water you sell rather than fish and shrimp. And as you know, water is cheaper.

Figure 5: a "soaked" shrimp



Source: ShrimpTails (2018)

European law neither prohibits the treatment of fish fillets and shrimp with phosphates, non-phosphates or salt,

nor does it prohibit the use of glazing. You are, however, required to label it correctly on the final product. So, if you treat a product with phosphates and soak more than a certain percentage of water, European Union regulation requires you to note this on the package. The same goes for glazing. If you decide to glaze your product and add 20% water, you can only declare a net weight of 800 grams, not of 1000 grams.

A supplier rarely engages in proactive mislabelling; it is usually done at the request of the importer. The importer sometimes does it on demand of their client, usually a wholesaler. For the consumer, it is impossible to see the difference between two bags with the same specifications on the label but a different water quantity in the package. If these two packages have a different price, the customer will go for the cheaper option. If the price difference is due to mislabelling, this creates unfair competition.

This negative trend has the potential to cause serious damage to the producers who participate in these practices and places the producer who weighs their products honestly at a disadvantage. European importers and their clients who do not commit fraud with labelling are increasingly complaining about their competitors who do, showing that some companies have begun to resist this trend. Even though it might not be your idea to mislabel, if you fulfil these requests, you are not only committing fraud, you are also putting your reputation at risk.

Once your name is connected to these malpractices, it will be tough for you to get rid of the bad reputation. Although these practices may provide you with short-term economic gains, in the long run, once the market becomes better regulated or once consumer awareness prevents these practices from continuing, you will be in trouble.

### **Tips:**

Read more [details about the issue of adding water to shrimp](#) and how it negatively affects the industry.

Openly communicate with your customer on the specifications of the product you are about to produce and write down the agreed details on specifications, treatment and glazing in the contract, so no misunderstanding can present itself when the product reaches the European customer.

Find out whether malpractices happen with the products that you are selling. If they do, pay extra attention to your customer's requests to avoid participating in fraud or other malpractices.

Include the accuracy of your labeling into your brand story. This might make you a preferred supplier in your target market.

Learn more about labelling requirements via this [pocket guide to Europe's fish and consumer label](#).

## **6. Rapid consolidation through mergers and acquisitions**

The global trend of consolidation through mergers and acquisitions in the seafood industry can also be seen in Europe. This can benefit you in two ways: as companies merge or are acquired, all companies in the group often expand their portfolio of products, creating new potential buyers for you. Furthermore, some companies invest in the production sector to ensure access to raw materials. Mergers and acquisitions can also increase a group's bargaining power, putting pressure on your bottom line.

The question is, what and who are driving it? Traditionally, in the fish and seafood industry, global fishing industry players that invest in their target markets drive mergers and acquisitions. By purchasing distribution companies that sell to wholesale and retail markets, these companies hope to have better channels through which to sell their products. Also, they hope to improve their margins by controlling the whole supply chain.



[Maruha Nichiro](#), the world's biggest seafood company, purchased [Seafood Connection](#) to have better access to the European market, and then, through Seafood Connection, made other acquisitions such as [Anova Seafood](#) in the Netherlands and [Inlet Seafish](#) in Spain.

[Parlevliet & van der Plas](#) acquired [Deutsche See](#) in 2018 to enter new and strategically important markets in Germany. Other prominent subsidiaries are [Heiploeg group](#), [German Seafood](#) and [Ouwehand visverwerking](#).

At the smaller end of the scale in mergers and acquisitions, in 2020, Klaas Puul (Dutch seafood importer and processor) was acquired by the British Sykes Seafood. By combining Sykes seafood with Klaas Puul, they can now supply the retail and foodservice in Europe with a complete range of shrimp.

As COVID-19 has hugely impacted the food service, and therefore the fish and seafood industries, many smaller companies have already started to struggle. Currently, there is still fear about a resurgence of COVID-19, and no vaccine in sight. While food service is reopening, it is doing so at a greatly reduced capacity. It is likely that, as things begin to normalise, not all of the (small) companies will be able to recover from the economic impact. This may lead to smaller companies closing for business or being acquired by bigger players.

### **Tips:**

Find your way into bigger groups and aim to become a preferred supplier. This could give you access to a much more stable demand, allowing you to become less dependent on spot market selling.

Subscribe to newsletters of the major seafood news media such as [UndercurrentNews](#), [Intrafish](#) and [Seafood Source](#) to stay up to date about mergers and acquisitions, to make sure that you understand the latest market dynamics.

## **7. European fish and seafood market since the corona-crisis**

Since early 2020, COVID-19 has had a major global impact. Businesses closed and trade was limited or stopped, in the beginning. COVID-19 hit the European seafood market in early March. To stop the spread, food service closed and travel (including tourism) became nearly impossible throughout Europe. This had an enormous impact on European seafood consumption. 2020's expected growth vanished and was replaced by a sharp drop in turnover for the sector. To deal with the crisis, new trends formed. Learn from the trends to find your way into Europe's market.

## **8. Sit-down restaurants begin to offer takeaway and delivery services**

Social distancing and the COVID-related closures of restaurants throughout Europe have created a lot of uncertainty for the businesses, despite any government support they might receive. The food service industry in some European countries, currently, is trying to adapt to the venue closures or limited capacity by offering takeaway and delivery services, where normally they would not. In this way, the restaurant industry in these countries has had the chance to open up again, even if only doing a small part of their normal (pre-COVID) trade.

Still, this will provide an additional way for fish and seafood products to reach the end customer through the food service industry. As restaurants start to reopen, due to continued social distancing behaviours, the traditional sit-down dinner segment of food service could continue to offer delivery and takeaway options. However, even if they do, there may be some hesitation for restaurants that do not specialise in fish and seafood to offer it in their (often) reduced takeaway or delivery menus.

## 9. Increased home consumption of prepacked fish products

During the COVID-19 lockdown, out-of-home seafood consumption was almost impossible. Restaurants and hotels were closed, and people were forced to cook at home. In this period, seafood products mainly found their way to the consumer via retail, but different companies adopted new marketing strategies to reach the consumer in other ways.

The sales of prepacked seafood products increased due to these new marketing strategies. Prepacked products are usually sold in sizes suitable for at-home cooking, where there is not always a lot of space to prepare seafood products. An increasing amount of European companies that were used to selling fresh whole fish at fish counters also started to sell more seafood products as prepacked products. An increasing number of consumers were more afraid that unpacked fish products are contaminated with the coronavirus.

When the hospitality industry opens again, the frequency of the at-home cooking of seafood is also expected to decrease. However, consumers experienced the possibilities of cooking fish at home and will keep doing this more frequently than before the crisis. Retail is a channel that will become increasingly important in this period and sales in this segment will increase. As consumers become more accustomed to the “new reality”, many are turning to online retail, and there is much more focus on fortifying the delivery or pick-up system.

### Tips:

Learn about [how COVID-19 has impacted European seafood consumption](#) in the CBI Trade Statistics and Outlook report.

Learn about [how to deal with COVID-19 in the Fish and Seafood Sector and how to continue business in these difficult times](#) in this CBI study.

Find more information about how COVID-19 has disrupted the seafood market in Europe in our [CBI-news article](#).

Offer your seafood products as prepacked portions, ready for use in European households. You can also provide recipes with your products to help consumers prepare their dish at home.

## 10. Rapid development of online sales

Another marketing strategy to reach the consumer is via online sales. The volumes of seafood sold this way increased significantly during the COVID-19 crisis and it looks like consumers are becoming more familiar with buying seafood on the internet.

There are companies that have professional web shops, like [Schmidt Zeevis](#) in the Netherlands and [the Fish Society](#) in the United Kingdom. Usually, these companies are already experienced in selling seafood products directly to the end consumer and have the logistics to deliver the fish in a certain area.

There are also companies selling their fish products via social media like Twitter and Facebook, whereas they normally only sell their fish products to the hospitality industry or wholesale. DaySeaDay in the Netherlands, for example, is a good example of a company selling seafood products via [Facebook](#) to end consumers in and around Urk (Netherlands).

### Tips:

Visit different European web shops to learn more about the products and the way they are selling

them.

Invent your own themed seafood boxes based on the strength of your products and convince your buyer to include you in their range. Especially in Northern Europe, seafood is regularly sold as theme boxes online, such as a barbecue box, a smoked seafood box or a ready-to-eat fish box.

If you have content that can be used on social media, use it as a unique selling point to your buyer, especially if this buyer is also active in online sales. Tell the sustainability story of your products, share (local) recipes for product use or share the mission and vision of your family business. These topics could all be good examples of attractive video, picture or written content, if high quality.

## 11. Increased focus on regional products

The reduced demand for seafood in Europe during the COVID-19 crisis also affected the European seafood producers. Fishermen reduced their fishing activities and aquaculture products were stored frozen due to the decreased demand caused by the lockdown. More and more countries are stimulating consumers to buy and consume regional seafood products.

The [Irish Food Board](#), for example, launched promotional campaigns in supermarkets, making Irish brown crab available for consumers. Dutch coastal areas are promoting fish from the regions, like [Scheveninger vis](#), [Zuidwester vis](#) and [Waddengoud](#). In [France](#) and [Italy](#) (super)markets are being stimulated to focus on selling domestic seafood products, making it harder for other products to enter the market. However, for a lot of seafood products, the European Union is not self-sufficient, and it needs to import these products from third countries.

Even though this trend will pose a challenge for you, it is one to be aware of because it allows you to concentrate your efforts. By understanding the different trends that are affecting the end consumer's needs, you can better align yourself with those trends that offer you opportunities. The story of a romantic and sustainably produced product made by small-scale farmers, may encourage purchases despite the product being imported.

### Tips:

Read the CBI Market and statistics study to learn more about [what Europe imports from third countries](#).

Use price, freshness and flexibility in the sale of your products to compete with the current over-availability of seafood products in Europe, caused by the COVID-19 crisis. These components are still of high importance.


Show your buyer that you are a reliable partner, now and in the future. Having a good relationship is particularly important in hard times.

Work to your strengths. Understand that though some trends pose threats, others provide opportunities. Look to your business and align your marketing strategies to promote those areas of your business that are in line with current trends.


This study has been carried out on behalf of CBI by [Seafood Trade Intelligence Portal](#).

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