

MARKET INNOVATION OVERVIEW

CATEGORY: Canned Fish Products | **COUNTRY:** Italy

Este documento foi elaborado no âmbito do projeto PortugalFoods Qualifica, com o objetivo de criar informação de alto valor acrescentado para as PME e restantes entidades do setor agroalimentar nacional, para que estas se possam posicionar estrategicamente no contexto do mercado global.

A informação contida neste documento provém do Observatório da PortugalFoods que, com recurso à plataforma Mintel, permite contribuir para a qualificação e sensibilização do setor agroalimentar, tanto ao nível do conhecimento sobre novos produtos e técnicas de produção, como ao nível do acompanhamento da evolução tecnológica e da evolução das preferências do consumidor.

A Mintel cataloga mais de 38 000 novos lançamentos de produto por mês, provenientes dos 86 mercados que monitoriza, analisando e categorizando todos os seus atributos, tais como os ingredientes, posicionamento e comunicação ao consumidor.

O Observatório da PortugalFoods constitui-se assim como uma ferramenta de grande importância para alicerçar o conhecimento das empresas do Setor Agroalimentar.

A REGIONAL INTRODUCTION:

CANNED FISH PRODUCTS IN EUROPE, MIDDLE EAST AND AFRICA

Ethics and supply chain transparency: Being transparent around sourcing and supply chain of fish will be key to build trust with consumers. Producers will need to raise their standards in terms of animal welfare to capture the attention of concerned consumers. For Europeans, high animal welfare claims are among the most important qualities when purchasing meat products. Consumers' distrust has increased the need for food and drink manufacturers to be forthcoming about their ingredients, production processes and supply chains. In this way, brands are providing detailed levels of transparency on areas such as sourcing, place of origin and production processes, front and centre of innovation.

Promote ethical and environmental activities: Creative marketing is a great way to promote ethical and environmental activities. Such innovative campaigns can be used to encourage transparency between producers and consumers.

Offer full traceability: Concerns around sustainable practices in fishing and fish farming have elevated the importance of traceability among consumers. Fish producers are encouraged to go a step further than communicating their sustainability practices through on-pack logos by offering full traceability credentials to connect with consumers.



CANNED FISH PRODUCTS IN ITALY

Market Overview

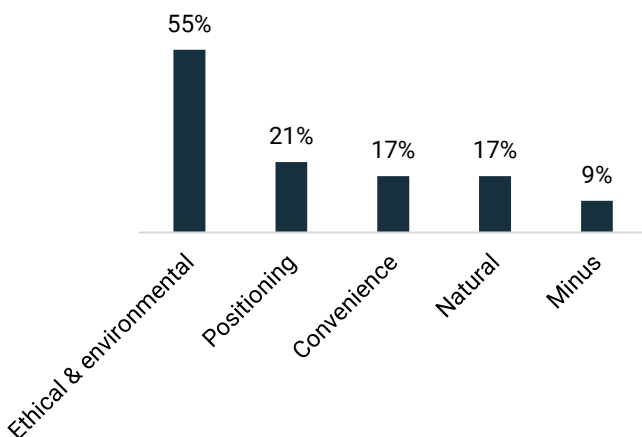
The Italian canned fish sector is expected to grow from €2.09 billion in 2018 to €2.50 billion by 2023, at a CAGR of 3.7%. In volume terms, the sector is expected to grow from 153.9 million kg in 2018 to 176.1 million kg by 2023, increasing at a CAGR of 2.7%.

Per capita consumption of canned fish in Italy is expected to grow from 2.55kg in 2018 to 2.94kg by 2023. Per capita expenditure in Italy stood at €34.7 in 2018 and is expected to reach €41.7 in 2023. (GlobalData, 2020)

New Product Development Analysis

2% of food products launched in Italy in 2019 were Canned Fish products.

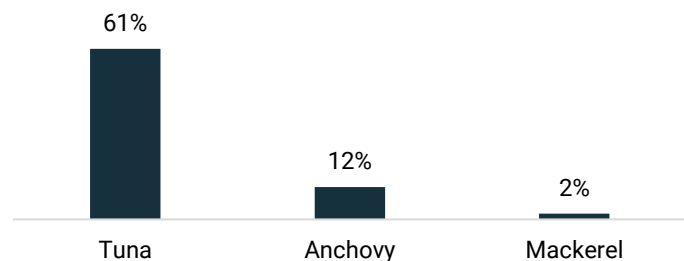
Top 5 Claim Categories in Canned Fish product launches, 2019



More than half of the canned fish products launched in Italy's retail market featured a 'Ethical & environmental' claim, with the most prominent one being the 'Ethical – Animal'. The 'Eco-Friendly Product' and the 'Ethical – Sustainable' claims were also used in more than a third of products.

More than half of the new product launches that happened in the canned fish sector featured 'Tuna' in their ingredients. 'Anchovy' was found in a 12% share of products.

Top 3 Selected Ingredients in Canned Fish product launches, 2019



This product features the ISO 9001 certification from the DNV GL, as well as the Dolphin Safe and Responsibility Quality logos.



This product is fished with sustainable methods in the cold and deep waters of the Cantabrian Sea, Spain, strictly during spring to have the best meats.



This 100% natural product is rich in omega 3, free from added preservatives, thickeners, colorings or flavorings.



THE ITALIAN CONSUMER



80%

Of Italian consumers cite **“high animal welfare”** as an important quality when purchasing processed meat, poultry and fish (2018)



73%

It is important to have **detailed information about where the fish & seafood products come from** (2018)



83%

Of Italian consumers cite **“no additives/preservatives”** as an important quality when purchasing processed meat, poultry and fish

What do you consider to be the benefits of canned food? (2017)

45%

Convenient



11%

Natural



19%

Good quality



Types of fish purchased in the last 3 months (2018)



61% Tinned fish/seafood (eg tuna)

A GLOBAL LOOK INTO THE FUTURE

Ethical and sustainability: Producers will be challenged to expand what it means to raise animals humanely. Consumers care about what goes into their food, and antibiotics and hormone avoidance has become an emerging free-from claim.

“Trash-fish”: In recent years, fishermen have begun intentionally catching unlovely fish in order to reduce the strain on overfished species as well as to celebrate the fish native to certain areas. In the future, these so-called “trash fish” will serve as a new source for fish products that can be positioned as sustainable and environmentally friendly, luring in a new class of consumers looking to do good with their food purchases. Since consumers likely may not want to look at ugly fish in their whole forms, these trash fish could be a plentiful and useful source for upcycled fish-based products, such as fish “bars,” flaked canned fish, and within frozen meals.

Para mais informações acerca do Observatório da PortugalFoods, por favor contactar knowledge.division@portugalfoods.org

