



FISH & SEAFOOD 2024

Our **Fish & Seafood** report looks at trends in fresh fish, tinned fish, frozen fish, cooking techniques, fish snacking, fish sandos, fin to gill, sea vegetables and more.

In this report, we analyse thousands of touch points across global menus, retail and social media to identify the big trends and future foresight.

CONTENTS

2	Introduction
3	Influences
8	Shopper of the Future
9	Future Opportunities
10	Key Ingredients / Flavours
12	Trends Framework
13	Snackification
24	Fishy Comfort
34	Fin to Gill
44	Flavour Bombs
53	Butter
63	Premium
72	Made, Not Created
80	Stealing The Limelight
89	Surf 'N Turf
99	Flavour
109	Cuisines
119	Summary

INTRODUCTION

Widely attributed as a key evolutionary catalyst of our development as a species, the seas and waterways continue to provide us with a huge array of sustenance to this day.

However, through decades of environmental ignorance, industrial-scale fishing and geopolitics, what was once a seemingly endless source of incredible produce has become fragile and now depends on us instead.

Luckily, significant scientific progress has been made to help ease this burden, with precariously numbered fish, such as halibut, being cultivated in labs. Meanwhile, the potential of kelp and algae is being unlocked to provide us with nutritious alternatives and a potential replacement for the much sought-after truffle.

Notions of sustainability, 'premiumization' and the 'snackification' of fish and seafood intersect as tinned products come to the fore and monkfish replaces beef in the iconic Wellington. Meanwhile, the fish we took as writ, like mackerel and sardines, make an elevated return, even inspiring a viral trend. The clamour for classic French cooking continues, whilst the classic surf & turf sees seafood-stuffed chicken wings on top of the menu. Hot honey still swarms our plates, from Chipotle-fried lobster to crayfish rolls and caviar comes in all forms to suit our requirements, both dietary and fiscally.



INFLUENCES

The following slides represent the three key, overarching themes that are influencing the category:

- **Provenance & Sustainability**
- **Snacking**
- **Viral Sensations**
- **Cost**



PROVENANCE & SUSTAINABILITY

As sustainable fishing remains a pressing issue, consumers and chefs increase focus on local options and heightened environmental credentials. Think local halibut crudo, native oysters, live-caught and humanely harvested fish packaged in fully recyclable and biodegradable materials, hand-dived scallops, and fish with ASC certification.



SNACKING

As consumers' eating preferences evolve, the demand for smaller, more convenient fish snacks is increasing. A wider variety of bite-sized products, such as coated fish bites, are becoming popular in retail. Health-oriented options, including tinned fish meals and omega-3-rich fish skin snacks, are also trending. Restaurants are adapting to this shift, offering more items like Gildas and on-toast snacks, such as brioche topped with anchovies and sardine toast with XO crème fraîche.

VIRAL SENSATIONS

The popular smoked salmon cucumber recipe has demonstrated how quickly viral items can fly off the shelves and significantly impact the fish and seafood industry. Currently, charcuterie boards featuring canned fish are gaining attention, while there is also a rise in the popularity of seafood platters designed for individual servings. Additionally, a recipe for prawns cooked in Sprite has gone viral. Could these trends lead to greater visibility for seafood in retail and restaurant menus in the future?

COST

The cost of living is continually affecting consumers' buying habits. In the fish and seafood sector, shoppers are gravitating toward convenience-led offerings that cater to families, such as frozen products and snacking choices. Additionally, chefs are utilising lesser-known seafood varieties that can be easily enhanced with simple ingredients. Consider fishes like sardines, coley, and mackerel. Or perhaps crispy cockles paired with gourmet condiments that still offer a premium feel at a much cheaper cost!

SHOPPER OF THE FUTURE

Sustainability – An ongoing and increasing consumer concern, matters surrounding sustainability are brought into particularly sharp focus through the lens of fish and seafood. To this end, line or wild-caught produce and packaged with recyclable or bioavailable materials will be key going forward. Similarly, the use of nutritious, regenerative kelp and algae seems set to widen as consumers become more open to its application.

Snackification – Snacking has changed dramatically in recent times, with fish & seafood as its latest target. Sardines on toast, bouillabaisse croquettes and chicken wings stuffed with prawns and lobster satisfy that ongoing trend for high-low creations.

Premiumisation – So it follows that a premium touch is equally sought after. Quality over quantity rules, especially if the provenance can be championed. The snowballing trend for caviar for all budgets tells us that consumers



What does this mean for fish & seafood?

Fish and seafood are assuming the role of traditional proteins, from monkfish Wellingtons and caviar sliders to 'fishcutterie'. It preserves that sense of occasion but on a whole other level – and one accessible to a slightly wider consumer base.

Feeding into this, the 'snackification' of fish and seafood is the evolution of snacking generally, driven by Gen Zs predilection for anywhere, anytime eating.

Premiumisation proliferates across all sectors, with quality often denoting provenance, sustainability and the feeling of a treat, especially during difficult times. Consumers want to feel the benefit both physically and mentally.



FUTURE OPPORTUNITIES

A **trend** is where there is growing evidence of something new.

An **opportunity** is where consumer demand is significant, but there is no established trend yet!

FIN TEC: Growing concerns surrounding food insecurity and sustainability have led to incredible scientific progress in the field of cell cultivation. Going forward, embracing this will be key, as getting used to these products will likely be the 'new normal' sooner than we might think.

ELEVATED EVERYDAY: The use of tinned goods is nothing new, with the pantry forming the cornerstone of our kitchens in a bid to keep the wolf that is the cost of living from our doors. However, coupled with consumers' insistence to enjoy a bit of luxury, premium tinned fish and seafood trends. With such a shelf-stable format, the key will be sourcing ever-exotic or at least prized, products that can handle the journey and still make something special.

CAVIAR CAVEATS: Whilst everyone enjoys a touch of luxury, it doesn't always come in our price range. Arguably a status ingredient like the grateable, shaveable Rolex that is truffle, caviar is having a moment – even if it's not from sturgeons. Tobiko caviar, like lumpfish roe and indeed roe in general or caviar made from seaweed, gives consumers a range of options to add that little bit extra, even if it doesn't wholly cost as much.



KEY INGREDIENTS / FLAVOURS



UMAMI

Fish sauce
Garlic
Marmite and miso beer butter
Miso nori butter
Mushroom
Mushroom garum
Salted egg
Sesame
Truffle



SWEET

Apple
Apricot
Coconut cream
Corn
Eggplant jam
Fish sauce caramel
Grilled stone fruit
Hot honey
Mango
Maple syrup
Olive caramel
Peach
Pineapple
Scallop roe fudge
Sweet chilli
Tamarind glaze
Tomato
Watermelon



DAIRY

Anchovy butter
Brown butter
Crème fraîche
Fennel cream
Garlic yoghurt
Goat cheese
Parmesan
Prawn head mayo
Seaweed custard
Stracciatella
Whipped ricotta



SOUR

Caper butter
Citrus kosho beurre blanc
Fermented chilli butter
Fermented mushroom
Fermented strawberry
Gooseberries
Kumquats
Lemon
Lime
Orange
Pickled jalapeño
Pickled onion
Preserved lemon
Preserved rhubarb
Softshell crab garum
Strawberry vinegar
Vinegar



SMOKE & CHAR

BBQ king prawns
Burnt butter beurre blanc
Burnt butter hollandaise
Charcoal octopus
Fire-grilled Hiramasa head
Rainbow smoked trout
Smoked anchovy
Smoked beurre blanc
Smoked cods' roe
Smoked haddock
Smoked salmon
Smoked sausage
Woodfired scallops



KEY INGREDIENTS / FLAVOURS



SPICY

Cayenne pepper
Chilli
Chilli crab butter
Curry leaf
Gochujang
Jalapeno
Kimchi
Marigold flower hot sauce
Nduja
Satay sauce
Sriracha
Szechuan pepper
Thai green curry
Thai spiced smoked scallop
Wasabi



MEAT

Bacon
Beef dripping
Beef heart
Bone marrow
Chicken
Chicken skin
Chicken wings
Chorizo
Lamb shoulder
Minced pork
Pancetta onion jam
Pork belly
Pork fat
Pork neck
Prosciutto
Sausage
Whipped lardo



SALTY

Anchovies
Caviar
Kelp
Kombu poached turbot
Samphire
Sardines
Seaweed
Seaweed butter
Trout roe beurre blanc



HERBACEOUS

Basil
Chive
Coriander
Dill
Mint
Parsley
Pesto
Rosemary
Thyme
Wild garlic
FLORAL
Bergamot
Elderflower
Hibiscus
Marigold
Nasturtium flower jelly
Rosehip



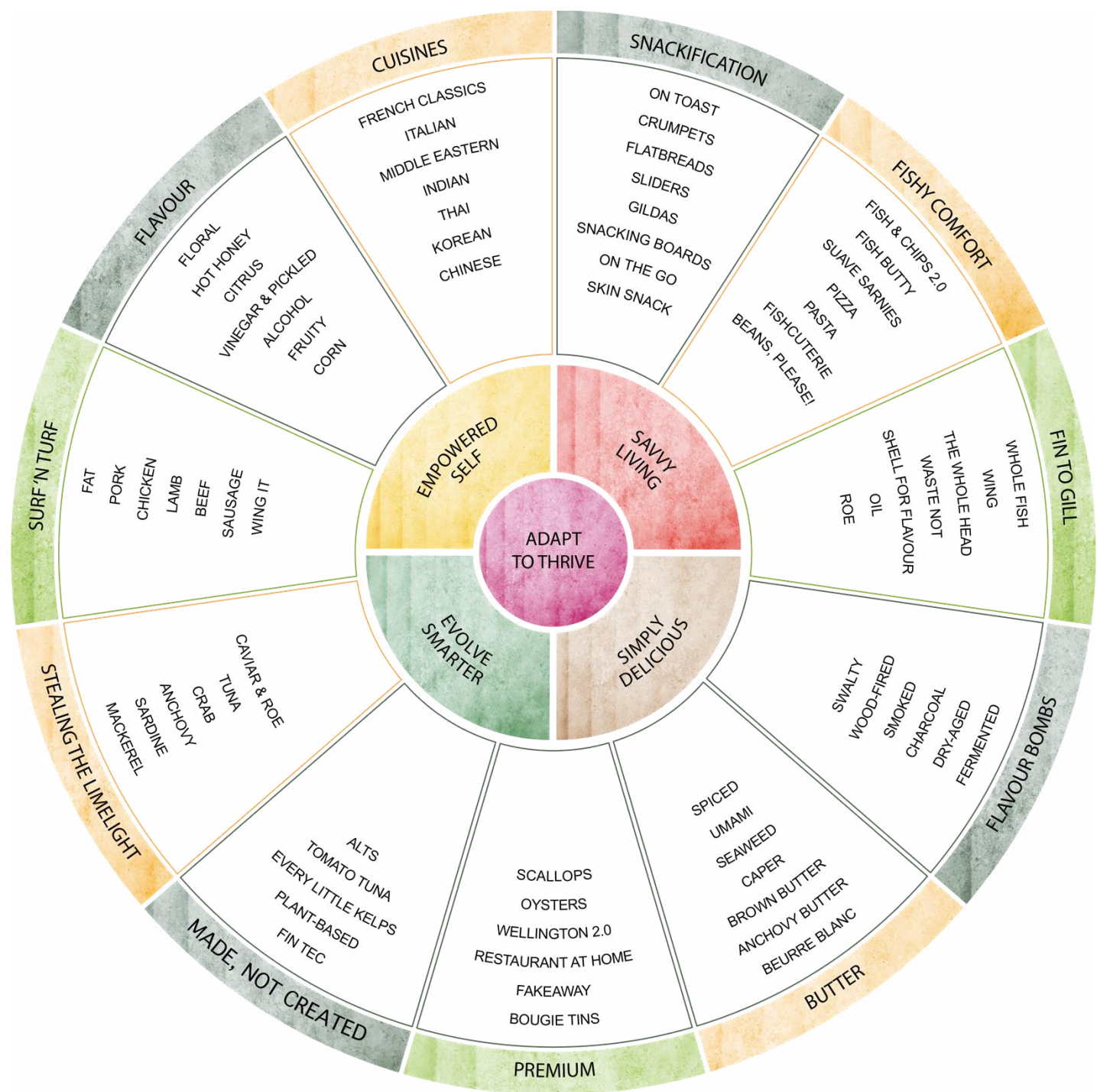
SPICES

Black pepper
Ginger
Bombay mix
Curry powder
Old bay
Paprika
Saffron



FISH & SEAFOOD TRENDS

This wheel shows the trends we have identified from researching **fish & seafood** for this report



SNACKIFICATION

Driven by evolving consumer eating habits, the demand for a wider variety of seafood options is becoming increasingly important.

A greater focus is placed on bite-sized products, such as gildas and mini toasts. For instance, sardine toast topped with stracciatella and XO sauce as a mid-day pick-me-up or lamb belly gildas with smoked anchovy—and, of course, an olive! These snacks are also poised to take the place of traditional lunchtime and dinner options. Snack boards overflow with a delightful assortment of seafood, while trendy tinned fish pairs well with various accompaniments - think cheese, fruit, and fresh vegetables for a nutritious lunch option. Even comforting crab crumpets, octopus flatbreads, and caviar sliders are becoming desired snacking options.

Additionally, there is a growing demand for convenient, on-the-go options. While fish and seafood may not typically be the most travel-friendly foods, tinned complete meals, snacking kits, and omega-3-rich fish skin snacks are emerging as practical solutions.



SNACKIFICATION

ON TOAST

CRUMPETS

FLATBREADS

SLIDERS

GILDAS

SNACKING BOARDS

ON THE GO

SKIN SNACK



TFP TREND ALIGNMENT: Adapt To Thrive || Empowered Self
|| Savvy Living

KEY REGIONS:



ON TOAST

A slab of bread with optimal toppings is becoming a staple snack as consumers opt for fishy toasts beyond the renowned prawn!

And though we tend to think of anything on toast as a rushed mid-week breakfast, these toasts are anything but as consumers tap into the ever-growing trend toward elevated pantry staples. Take tinned anchovies and sardines, often overlooked in home kitchens; global chefs welcome us to a new world of flavour and premiumisation. Pair with heirloom tomatoes and stracciatella or introduce XO sauces for an added umami boost and a lifting squeeze of lemon.



Clockwise from top left: Anchovy toast with shokupan, local bay anchovies and heirloom tomatoes, **Ernest** (San Francisco, US) || Brioche topped with oritz anchovy, stracciatella, and Italian XO, **Arms Length** (NSW, Australia) || Sardines on toasted brioche with charcuterie XO crème fraiche, **Continental Deli Bar Bistro** (Sydney, Australia) || Sardine toast with goat cheese, pesto and lemon zest, **Despaña** (New York, US)

CRUMPETS

Again, another classic breakfast staple slathered with salty butter, crumpets are becoming a go-to snack for an influx of fishy delights.

Prawn cocktail leaves the iconic glass in favour of soft pillowy crumpets, whereas classic crab salads appreciate the extra carbs. Much like on toast, luxurious touches and elevated flavours trend here, too. Take a crumpet and fry in delectable butter topped with torched oily mackerel and finished with a drizzle of prawn oil. *Delicious!*



Clockwise from right: King prawn cocktail crumpet, **Sourdough Crumpet Co.** (Australia) || Dorset crab salad on crumpet, **The Scallop Shell** (Bath, UK) || Mackerel crumpets, **@gabrielwaterhouse** (Instagram, UK) || Prawn crumpet, **Ballarat Restaurant & Bar** (Victoria, Australia)





FLATBREADS

Added carbs (aka the inclusion of bread!) are a conspicuous theme here...

...And though some would argue these are more than a snack, the younger generation bridges the gap between meal-time and snacking as fishy flatbreads greet starter menus and become a welcomed mid-day pick-me-up. From mussels, prawns and a mixture of everything (prawns, calamari, mussels in one), the substitute of one less layer of bread makes it a snack, *right?*

Anti-clockwise from top left:
Mussel flatbread, **Straker's** (London, UK) || Shrimp and scallops' flatbread, **FishBites Seafood** (North Carolina, US) || Seafood delight flatbread, **The Beacon** (New Jersey, US) || Spanish style flatbread, **La Loca Maria** (Mumbai, India)





SLIDERS

Unsurprisingly, sliders have become a favoured choice as a carby carrier. However, this time, they feature a unique element—no typical burger fillings!

Mini sliders pack with homemade fish bologna seasoned with pickled pepper tartar, and fish takes on the format of sausages for a playful twist. Again, premium ingredients enhance this beloved game day snack with additions like caviar and homemade sauces, contributing to a more upscale experience. In the retail market, thoughts move towards mini pre-made caviar and prawn sliders, perfect as hors d'oeuvres for Christmas celebrations.

Clockwise from top middle: Fish bologna Hawaiian roll, **The Kingtide** (South Carolina, US) || Caviar sandwich, **Chubby Fish** in Charleston, South Carolina via **Bon Appétit** (Youtube) || Fish sausage slider, **Rosella KPT** (NYC, US)

GILDAS

Typically found across most bars in the Basque Country, gildas, often referred to as pincho, pintxo, or pinchu, are becoming a staple handheld snack on restaurant menus worldwide.

These small but mighty handheld snacks pack a punch, often combining fish, meat, dairy and pickled ingredients in one mouthful. On menus, salty anchovies pair with the richness of lamb belly and the tartness of olives. Similarly, meaty octopus pairs beautifully with the intensity of smoked sausage and a squeeze of fresh lemon. The possibilities at home are endless, too. Consider ready-made skewers as part of a high-protein lunch meal deal or try surf-and-turf octopus and lamb skewers for your next BBQ!



Clockwise from top right:
Anchovy gilda with anchovies, labneh stuffed olives & Guindilla peppers, **Bar Miette** (Brisbane, Australia) || Lamb belly Gildas with pressed lamb breast, smoked anchovy, guindilla & gordal olive, **ALBERTA'S** (Brighton and Hove, UK) || Shrimp and egg gildas, **Eel Bar** (New York, US) || Octopus and smoked sausage skewer, **OMA** (London, UK)



SNACK BOARD

Snack boards (aka girl dinner) persist as consumers swap their usual meals for a little bit of everything!

Think plates filled with fresh veggies, fruit, rich cheeses, cured meats and tinned fish to create a balanced meal or snack. Seafood platters (or newly phrased *seacuterie*) become a sight to behold as marinated tinned sardines, roasted oysters, and prawn skewers cater to all your seafood needs!



Clockwise from top right:
Snack plate with rainbow smoked trout, @aprettykitchen (Instagram, US) || Seacuterie platter, @santuari.bn (TikTok) || Seacuterie board, @ainttooproudtomeg (TikTok) || Tinned fish board, @freshemeals (Instagram, US)



ON THE GO

Enjoying fish snacks on the go can often prove a bit of a faff or unappealing at the best of times (plain seafood sticks come to mind!), so companies look to offer a helping hand and much-needed inspiration!

From pre-made tapas boxes filled with tinned fish, condiments and crackers to snack kits providing everything you need for a delicious take on avocado on toast with smoked salmon, even veggie salmon-inspired bites welcome the category. For those unable to assemble ingredients on the go, why not combine everything in one convenient tin? Think smoked salmon fillet with quinoa boasting 19g of protein – simply open and eat!

Clockwise from top left: Nordic tapas boxes, **FANGST** (Denmark) || **Cole's Seafood** open & eat Patagonian smoked fish products (US) || **Acme Smoked Fish** lox in a box snack kit (US) || Smoked salmon-inspired veggie bites and tuna-inspired veggie bites, **Hooked Foods** (Sweden)



SKIN SNACK

Move over potato chips; we want fish skin chips!

That's right! Crispy fish skin snacks are taking over as an influx of at-home recipes and flavoured varieties enter the category for a convenient way to increase intake of omega-3 and reduce waste! Spicy flavours trend with jalapeno and cayenne pepper coatings, while some tap into the beloved umami flavours with truffle and salted egg goodness.



Clockwise from top right: Jalapeno cheese flavoured salmon skin, **IRVINS** (Singapore) || Seabass salmon crisps, **@jules_cooking** (TikTok) || Salmon fish skin chips in four flavours including truffle, spicy mala, tom yum and salted egg, **Crusty's** (Singapore)

THOUGHT STARTERS

Snack Boards - As more consumers welcome snacking into their daily food habits, consider the idea of pre-made seafood platters and snacking plates. For instance, why not change your usual meal deal wrap for a balanced bowl that includes fresh fruit and veggies, tinned fish, cheese, and some carbs? Not only is it delicious, but it will also keep you satisfied and full for even longer!

Fish Butty 2.0 - The combination of fish and carbs has been adored for some time, and as snacking welcomes mealtime, consumers show a preference towards carby carriers. Think crab crumpets, sardine sourdough toasts, and octopus flatbreads for a change from the usual white sliced bread and battered fish.

Out & About - Busy lifestyles result in many consumers seeking convenient on-the-go snacks. Consider tinned fish complete meals, including smoked trout and quinoa, omega-3-packed fish skin crisps, and smoked salmon cracker kits, as a healthy and delicious way to change up those mad mid-week rushes!



FISHY COMFORT

Can you find a dish more comforting than a big plate of fish and chips or a fish butt loaded with tartare sauce? *It seems unlikely!*

Unsurprisingly, the overriding theme here is the craving for carbohydrates. Indulgent pizzas topped with charred octopus, creamy pasta featuring mussels, and heart-warming butter beans floating in broths all pair beautifully with flaky fish.

In addition to our cravings for carbs, a desire to elevate renowned comforting dishes trends. For instance, while traditional fish and chips remain popular, we now have creative variations served with hand-cut potato crisps, encased in pastry for a fun twist, or even as salmon avocado tartare. Similarly, fish sandwiches are upgraded with halibut, roe remoulade, and smoked haddock options.

Moreover, traditional techniques used for charcuterie meats have given rise to a new category known as 'fishcuterie'. Imagine enjoying dry-aged swordfish and tuna bacon!



FISHY COMFORT

FISH & CHIPS 2.0

FISH BUTTY

SUAVE SARNIES

PIZZA

PASTA

FISHCUTERIE

BEANS, PLEASE!



TFP TREND ALIGNMENT: Adapt To Thrive || Savvy Living || **KEY REGIONS:**





FISH & CHIPS 2.0

For some, it doesn't get much more comforting than a plate of fish and chips.

And though the classic format is still loved worldwide (fried fish and chunky chips with tartare sauce and a side of mushy peas), innovations of the British classic come to the forefront. Think serving with hand-cut potato crisps, opting for Dover sole instead of cod or enjoying in a pie format with pastry outers, chip toppings and fishy inners. Or perhaps deconstruct the idea entirely; why not try salmon avocado tartare with a side of potato chips?



Anti-clockwise from top left:
Fish and chips with hand-cut potato crisps, **Mister Sunday** (Indonesia) || Fish and chips pie, **@sainsburysmag** (Instagram, UK) || Fish and chips with dover sole and dirty fries, **@recipebreakout** (Instagram, UK) || Salmon avocado tartare with homemade potato chips **MORU** (New Jersey, US)

FISH BUTTY

Similarly to the joy of fish and chips, anything encased in pillowy soft bread is a winner!

Traditionally, cod took centre stage in a fish butty, but nowadays, we're witnessing growth in other fish varieties. For example, crispy whitebait, hake, salmon, smoked haddock and halibut. In retail, thoughts move toward an increase in lesser-known varieties of frozen panko-coated fish.



Clockwise from top left: Crispy whitebait sandwiches, **Cutler** (Victoria, Australia) || Fish fillet sandwich with panko crumbed hake, **Self Raised** (Sydney, Australia) || Fish finger butty with homemade salmon and smoked haddock, **SKAUS** (Liverpool, UK) || Duo fish sandwich, **Eggslut** (Hong Kong)





SUAVE SARNIES

A slight upgrade from the classic fish butty, there's also room for sophisticated sandwiches.

Think anchovy fillets pressed between two slices of bread generously spread in hot anchovy butter, posh fish finger sandwiches with crushed mint peas and crusty potato rösti, fish roe remoulades oozing from the inners and scallop royale sandwiches cooked in lardo with sweet and sticky bacon and a topping of samphire. *Are you hungry yet?*



Anti-clockwise from top left:
Anchovy sandwich, **@thetinnedfishmarket** (Instagram, UK) || Fish sandwich with fish roe remoulade, **Baret** (Berlin, Germany) || Scallop royale sandwich, **ROE** (London, UK) || Posh fish finger sandwich, **SandwichSandwich** (UK)



PIZZA

Pizza has become a crowd-pleaser that transcends traditional toppings, shifting from meat-heavy options to delightful seafood sensations.

Beyond the occasional anchovy, pizzerias are now showcasing a variety of unique seafood toppings. Ingredients like octopus, prawns, and lacquered eel offer a meaty texture and rich flavour that balance beautifully with the acidity of tomatoes and the sweetness of fruit. Additionally, Japanese cuisine adds a fusion twist by combining the beloved flavours and ingredients of sushi with pizza. For example, raw tuna, crispy rice, and wasabi crème to create an exciting culinary experience. Could we see an influx of global-inspired frozen pizzas in retail, say smoked salmon topped with bagel seasoning and a cream cheese base, or perhaps a miso-marinated black cod with a side of kewpie mayo?

Clockwise from top left: Octopus pizza, **KAJA PIZZA KÖÖK** (Tallinn, Estonia) || Charcuterie XO prawn pizza, **ULLO Dee Why** (Sydney, Australia) || Fior di latte, raw tuna, crispy rice with wasabi crème pizza, **QT Pizza Bar** (São Paulo, Brazil) || Lacquered eel, Chinese cabbage and apricot pizza, **La Cascina dei Saponi** (Rezzato, Italy)

PASTA

Another trending Italian favourite, pasta and seafood are a classic, comforting combination.

It's no surprise that mussels and clams continue to frequently appear across restaurant menus served in indulgent white wine cream sauces and garnished with fresh herbs. The iconic Old Bay seasoning has made a comeback, enriching rich butter to enhance the flavours of scallops and mussels, offering a delightful blend of sweet, spicy, and savoury notes. Additionally, nduja has become a sought-after option, satisfying cravings for spicy flavours while combining seafood and meat in a single dish.



Clockwise from top left: Mussel linguine with a parsley, saffron and white wine sauce, **@saturday.kitchen** (Instagram, UK) || Spaghetti with clams and white wine, **seva** (San Juan, Philippines) || Fettuccine with bay scallops, rock shrimp mussel, old bay butter, chives, **Rosewater Kitchen & Bar** (North Carolina, US) || Linguine con Nduja with mussel broth, linguine pasta, parsley, parmesan and Nduja sausage, **Mad & Kaffe** (Denmark)

FISHCUTERIE

Much like the captivation of *seacuterie* boards, there is a growing trend in adopting cooking methods traditionally used for charcuterie meats in fish, aka *fishcuterie*!

Red tuna belly can be treated similarly to ham to create a unique product often referred to as 'sea ham', while 12-15 week dry-aged swordfish welcomes spices like garam masala. Additionally, tuna employs techniques and flavours similar to those used for bacon, giving a whole new meaning to the concept of surf and turf. While this trend has mainly emerged in high-end restaurants equipped for such processes, there is significant potential in the retail space, especially with the rise in snacking culture and the popularity of casual dining. Imagine seafood platters that feature dry-aged fish served alongside onion jams and charred vegetables for a change from the usual!

Clockwise from top middle: Red tuna belly, cured as a traditional ham by a prior salted and a 50-day fine-tuning, **FISHØLOGY** (Barcelona, Spain) || Cured fish on the bone dry aged for 12 to 15 weeks, **Tartarun Fish Restaurant** (Malta) || Fish charcuterie with swordfish ham, tuna rillette, and tuna bacon, **Automatic Seafood and Oysters** (US)



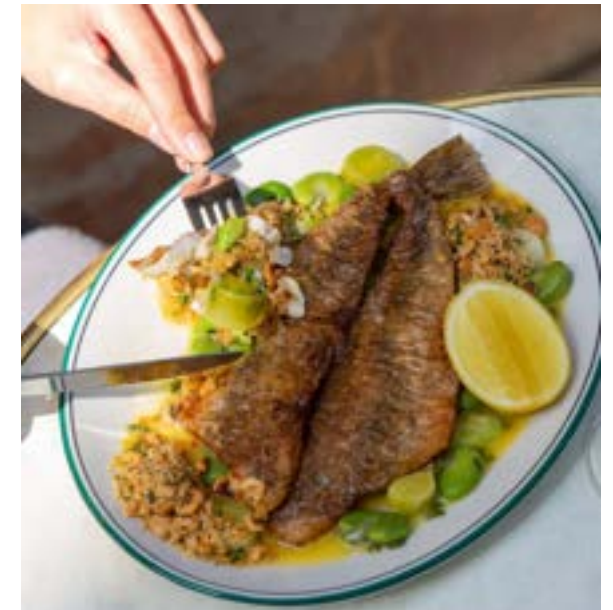
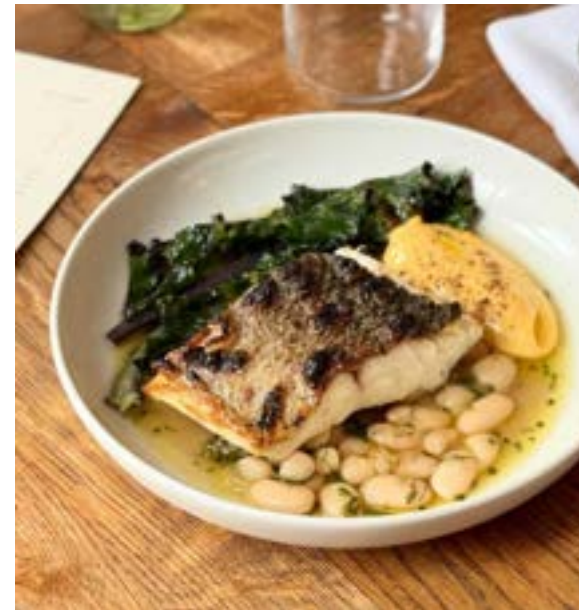
BEANS, PLEASE!

Beans are one of the most comforting carbohydrates, adding a hearty element to light fish dishes.

Once overlooked, these inexpensive and nutritious fibre-rich powerhouses have transformed fish dishes to new heights. Varieties like butter beans, tarbais, and lima beans are deliciously combined in warming broths, herby pesto, and rich chorizo, making them versatile for summer and winter menus.



Clockwise from top right: Red fish with lima beans, and crispy chorizo, **Puritan & Co.** (Massachusetts, US) || Whole butterfield flathead with broad beans, **Kirk's Wine Bar** (Melbourne, Australia) || Wild sea bass with tarbais beans, **Straker's** (London, UK) || Cornish Mackerel with herby pesto beans, **@recipebreakout** (Instagram, UK)



THOUGHT STARTERS

Elevated Sarnie - The fish sandwich remains a favourite among chefs and consumers. In response, innovative variations on the classic fish finger butty are captivating new audiences. Consider refined options like fish roe remoulade paired with halibut or a scallop royale cooked in lardo and accompanied by sweet and sticky bacon.

Fishcutterie - Alongside the popularity of fishcutterie and seacutterie boards, seafood is adopting techniques traditionally associated with charcuterie meats. Picture 12 to 15-week dry-aged swordfish, cured red tuna belly, and tuna bacon paired beautifully with pickles, fresh vegetables, and various condiments.

Cheap & Cheerful Carbs - At the core of comfort food is the craving for carbs. It's no surprise that generous servings of pasta and pizza are embracing seafood flavours, featuring ingredients such as octopus, mussels, and lacquered eel. Additionally, budget-friendly beans contribute to comforting dishes, often found in hearty broths and herby pesto - *delicious!*



FIN TO GILL

To reduce waste and promote a more sustainable fishing industry, consumers and chefs are embracing the concept of '*fin to gill*' eating, highlighting the joy and possibilities of utilising the entire fish.

Cooking whole fish preserves flavour and requires minimal ingredients. Simply roasting them over an open flame results in tender, melt-in-the-mouth flesh and crispy, charred skin. There's also the opportunity to serve the whole head and fins. For example, a whole cod head garnished with sriracha butter and tangy tamarind-glazed fish fins - *delicious!*

If eating a whole fish feels intimidating, there's still room for upcycling leftovers. For instance, transforming your leftover lobster from a noodle dish into lobster oil. Or, if you enjoy the flavour of prawn heads but not the texture, you could make a delightful prawn head mayo to accompany your dish. Additionally, the shells are packed with abundant flavour and can become the base for sauces, vinegar, and warming broths!



FIN TO GILL

WHOLE FISH

WING

THE WHOLE HEAD

WASTE NOT

SHELL FOR FLAVOUR

OIL

ROE



TFP TREND ALIGNMENT: Adapt To Thrive || Evolve Smarter || Simply Delicious

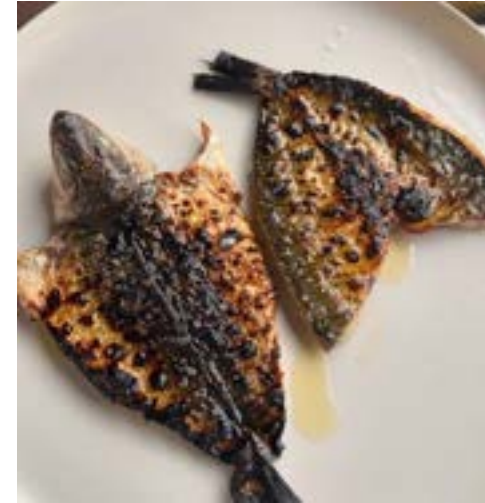
KEY REGIONS:



WHOLE FISH

Diving straight into the deep end (*no pun intended!*), consumers look to enjoy the whole fish, bones and all!

Global chefs are transforming the once-overlooked sardines into flavorful sensations, often pairing them with a simple lick of sauce. While BBQ cooking techniques enhance their taste, making them enjoyable as they are. Additionally, incorporating various fish parts into a single meal adds both environmental and premium appeal, offering easy adaptations for retail. For example, ready-made whole lobster noodles featuring lobster meat and broth or a unique take on fish and chips employing cod head mayo or fish garum vinegar. Moreover, companies inspire a new movement towards utilising leftover fish parts (e.g. fins, heads, frames) after the filleting process to help promote sustainability in the fish processing industry and result in delicious fish products!



Clockwise from top right: Butterflied and BBQ'd Tommy Ruff fish, @mattstication (Instagram, Australia) || Whole live lobster noodles, **Chinese Tuxedo** (New York, US) || Whole pan-fried sardines with a chraime dressing, **Maray** (Liverpool, UK) || **Hailia** and **Hätälä** launch a fish product made from the salmon parts left on the table after the filleting process (Finland)



WING

Similarly, the wing is an often delicious yet underutilised part of the fish that is gaining more attention.

Currently thriving in the culinary world, particularly when paired with butter sauces and umami glazes. However, we anticipate significant growth in the retail sector as well. Instead of the usual salmon fillets paired with sweet chilli glazes, could we see fish wings served with saffron-infused butter or honey truffle butter, ready to be pan-fried or oven-baked?

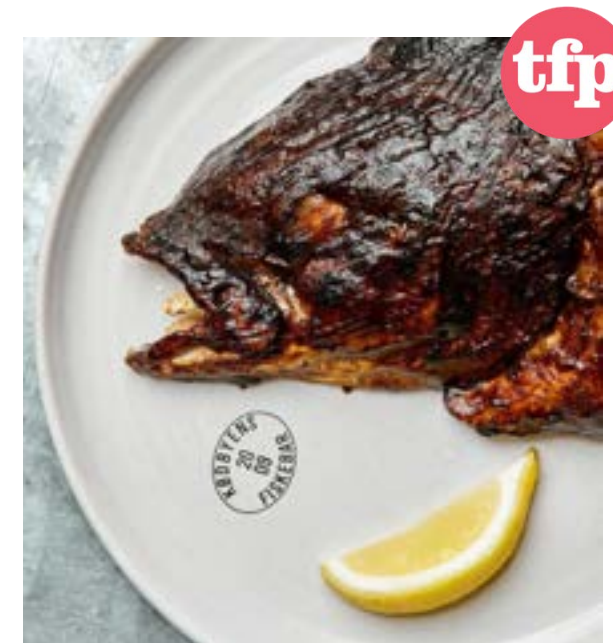
Anti-clockwise from top left: Skate wing with brown butter, crispy capers and samphire, **The Five Bells Stanbridge** (Bedfordshire, UK) || Smoked salmon belly 'wings' @**julesfood** (Instagram, US) || Crispy fish wing with tangy tamarind glaze and aromatic cashew vadouvan, **Republic of Fremantle** (Fremantle, Australia)



THE WHOLE HEAD

While whole fish heads may not be the most visually appealing, they play a significant role in reducing waste and enhancing flavour.

Chefs are finding creative ways to utilise them, from fire-grilled Hiramasa heads glazed with umami-rich mushroom and kelp to cod heads served in spicy sriracha butter. Even the heads of whole prawns are being recommended for an extra burst of flavour! However, if tackling an entire fish head feels daunting, you can still join in on the trend. For example, salmon heads rich in omega-3s, proteins, vitamins and collagen, and often free from fish mongers (*win, win!*) can be grilled, shredded, and mixed with Kewpie mayo for a delicious onigiri.



Clockwise from top right: Fire-grilled Hiramasa head, glazed with mushroom and kelp, **Kødbyens Fiskebar** (Copenhagen, Denmark) || Grilled salmon head onigiri, **@thesocialfood** (Instagram, France) || Cod head served in sriracha butter, **FALLOW** (London, UK) || Whole prawns with head, **Mob** (UK)



WASTE NOT

A key theme throughout the trend, reducing waste reflects consumers' commitment to using every part of the ingredient.

Repurposed fillet off-cuts that usually get tossed aside are upgraded to salt and pepper fried fish wings with chilli and spring onion while bluefin tuna heads encased in a consommé from the bones, *yum!* Moreover, bone broth has had a resurgence in popularity, celebrated for its high collagen content, vitamins, and minerals. Sustainably caught fish bone broth, sourced from small-scale fishing boats, promises exceptional quality and flavour, making it an ideal addition to your pho and soups during the winter months.

*From left to right: Salt and pepper fried fish wings, **Scalable Fish-op** (Melbourne, Australia) || Blue fin tuna heads with a consommé made from the bones and thinly sliced collar, **Wilsons Restaurant** (Bristol, UK) || Sustainably caught fish bone broth, **Borough Broth** (UK)*





SHELL FOR FLAVOUR

It's a well-known fact that the shell holds abundant flavour, and though often used for broths, we are witnessing growth in new formats.

Mainly witnessed with prawn shells, favourite condiments get a seafood spin with roasted prawn heads; butter takes on the flavours of shellfish paired with delectable king prawns; and masaman sauces greet the addition of prawn heads, too. Additionally, vinegar gets a shell twist by adding an extra umami boost. In retail, could we see an increase in shells used for flavour? A prawn head butter paired with seabass comes to mind!



Anti-clockwise from top left:
 Yellow prawn head masaman sauce, **@margatechef** (Instagram, UK) || Montauk scarlet prawns with roasted prawn head mayo and umeboshi, **Bar Contra** (NYC, US) || Prawn cured in vinegar, **@debocaaccion** (Instagram, Spain) || King prawns cooked in shellfish butter, **Kiyomi** (Gold Coast, Australia)

OIL

Infusing oils is an excellent way to enhance the flavour of dishes and make use of leftovers.

Whether prawn, shellfish, bisque, or lobster, combining these seafood components with oil elevates even the simplest meals to a luxurious level. In a retail setting, imagine offering a premium ready meal accompanying a pipette of lobster oil for added flavour. Alternatively, consider ready-made infused bottles, such as prawn head olive oil or shellfish sesame oil.



Clockwise from top right: Skull Island prawns with brown butter, bisque oil, and fried capers, **Lola's** (Australia) || Cured scallop kokum with prawn head oil, **Brockton Lane** (Canada) || King Dory, fish mousse, beluga lentil, fennel cream and shellfish oil, **Osteria Ilaria** (Melbourne, Australia) || Lobster ravioli with lobster head sauce and lobster oil, **Casa Cucina & Bar** (Hong Kong)



Clockwise from top right: Sous vide prawns with pickled onion, celery, tomlberries, prawns roe mayo, **Pilu at Freshwater** (NSW, Australia) || Kombu poached turbot, served with dashi & roe emulsion, **@mymuybuenochefs** (Instagram, UK) || Charcoal bucatini tossed with smoked cods roe emulsion and grilled Scottish mackerel, **STUZZI** (Leeds, UK) || Lobster tail with a lobster sauce and emulsion of lobster knuckles and mullet roe, **@jimmynaps** (Instagram, UK)

ROE

With the ability to add a salty and subtly sweet flavour in seconds, roe is a favoured ingredient.

Again, condiments get a seafood spin with the addition of prawn roe to classic mayonnaise. Roe emulsions trend on restaurant menus across the globe. Think lobster and mullet roe emulsion drizzled over lobster tail - *delicious!*



THOUGHT STARTERS

Whole Head - Similar to the meat and poultry industries, chefs are looking to add a premium touch to fish parts that have previously been overlooked and discarded as food waste. With a few cooking techniques, Hiramasa heads can be transformed to showcase rich depth and flavour through fire-cooking, while cod heads glazed in sriracha butter become a highlight on restaurant menus.

Upcycle Me! - Fish parts that are often thrown away can present optimal flavour and can effortlessly turn into flavoured oils and elevated condiments. Don't want to eat the prawn head? Try turning it into roasted prawn head mayo for an incredible flavour boost! Alternatively, make a compound butter using leftover shellfish or infuse oil with lobster shells.

Bones & All - For some, the entire fish is just as appealing. Whole sardines pair well with simple sauces, and BBQ cooking techniques add enough flavour to make them enjoyable on their own. In retail, a growing focus on utilising leftover fish parts after the filleting process to promote sustainability.

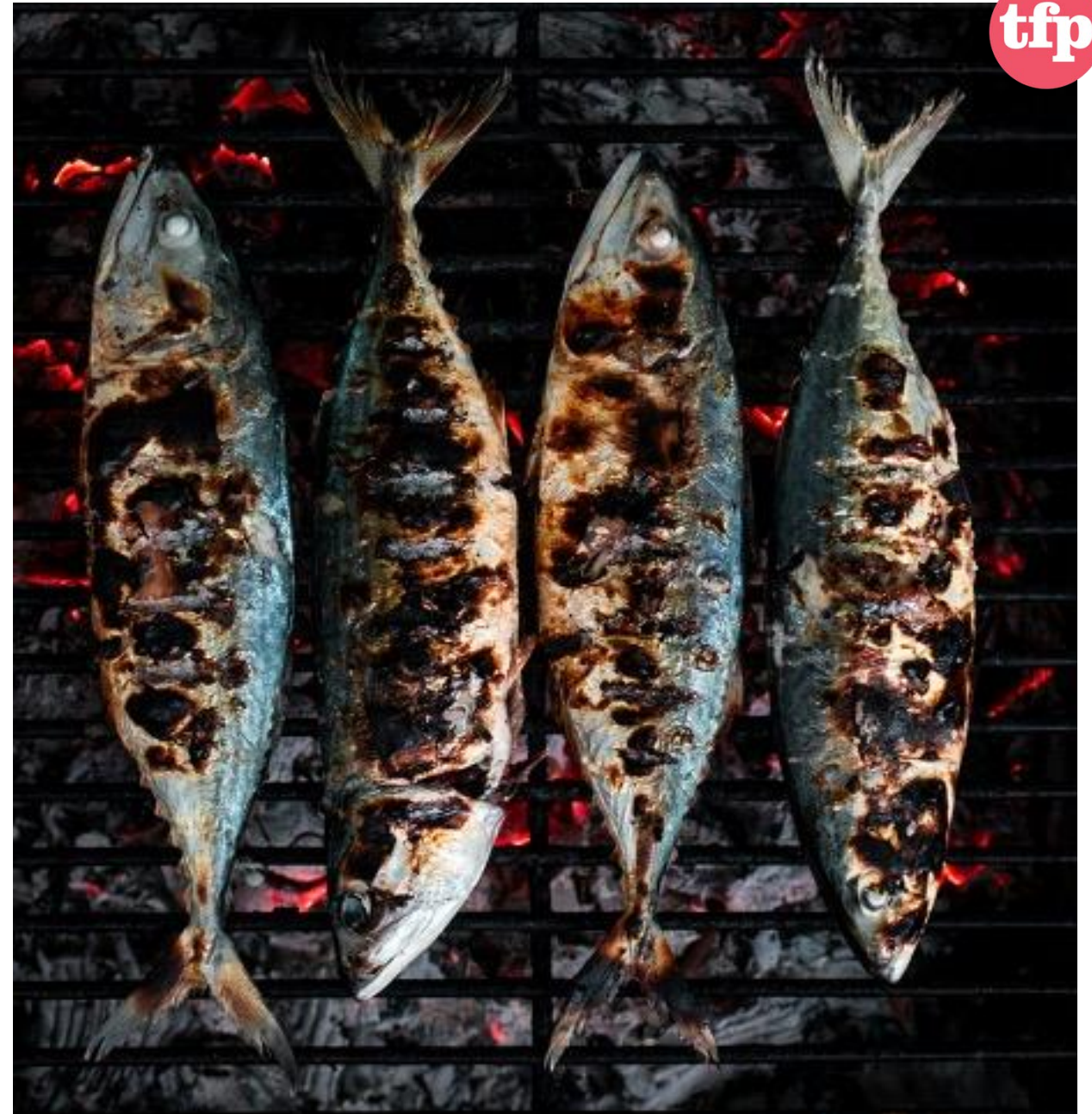


FLAVOUR BOMBS

Fish and seafood have a subtle and delicate flavour on their own, but enhancing cooking methods and additional ingredients can significantly elevate their taste.

For the most part, we tap into our primal instincts, making fire cooking a popular method for adding depth of flavour. Think wood-fired scallops served with smoked tomato passata, charred octopus paired with lamb kabsa sauce and smoked anchovy on the bakery's favourite sourdough.

Alternatively, incorporating fermented pairings can lighten fish dishes. Ingredients such as fermented strawberries add a sweet yet sour flavour profile. While soft-shell crab garum not only helps reduce waste but also provides an intriguing flavour enhancement. Furthermore, it's impossible to discuss 2024 culinary trends without mentioning swalty flavours, which abound this year. Think caramels, grilled stone fruits, and fruity sauces as delicious pairings to complement seafood.



FLAVOUR BOMBS

FERMENTED

DRY-AGED

CHARCOAL

SMOKED

WOOD-FIRED

SWALTY



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious

KEY REGIONS:



FERMENTED

Fermented ingredients are a cherished culinary technique among chefs able to add a premium touch and an uplifting note to fish and seafood.

From pairing alongside fermented fruit and vegetables, say strawberry and mushroom, to becoming a central flavour component, for instance, prawns coated in fermented chilli butter, it is a technique sure to impress. Seafood garums are another intriguing flavour enhancer. Not only do they help reduce waste, but they also contribute a rich umami taste to almost any dish. For example, consider soft-shell crab ramen paired with luxurious soft-shell crab garum for an extra boost of flavour.

tfp



Clockwise from top right:
Calamari with basket grilled leaves and fermented strawberry, **agnes** (Australia) ||
Tuna with fermented mushroom and caviar, **Kødbyens Fiskebar** (Copenhagen, Denmark) ||
Prawns with fermented chilli butter and crispy curry leaves, **@bentrobbiani** (Australia) ||
Softshell crab garum, **@chefgrahamcalabria** (Instagram, US)





DRY-AGED

A new technique for preserving your catch, dry-aged seafood is gaining recognition in the culinary world.

While this method is usually associated with beef, it is becoming a more commonly used approach in the seafood industry. Mainly due to its ability to enhance texture, flavour and aroma (similar to meat!), innovative global chefs look to showcase this once-underutilised technique. In the future, expect dry-aged varieties of fish such as Murray cod, tuna, and monkfish to appear on restaurant menus, with future growth in the retail space.

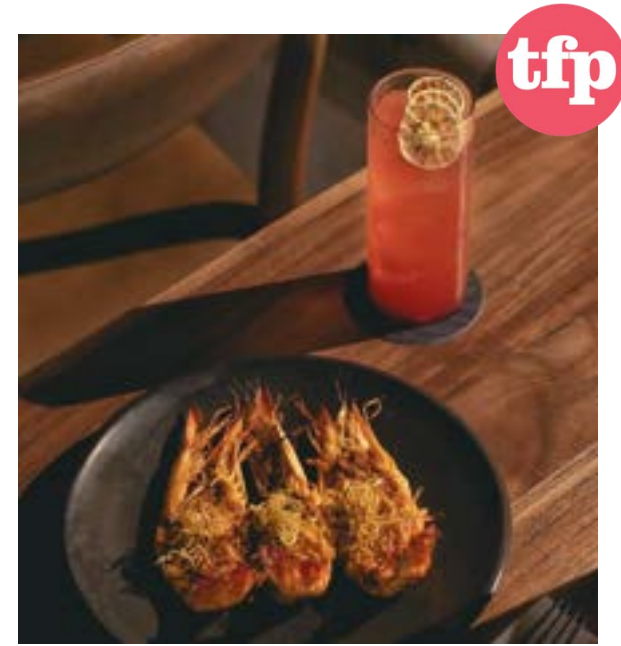
Anti-clockwise from top left: Dry aged murray cod with mussels, drop peppers and caviar, **Hatch Restaurant** (Sydney, Australia) || Dry aged big eye tuna sirloins, **Josh Niland** (Chef at Saint Peter, Australia) || Dry-aged black pepper monkfish, **Nathan Outlaw** (Chef, UK)



CHARCOAL

Combining the delicate flavours of fish and seafood with the intense smokiness of the barbecue is always a winner.

Some chefs keep it simple with BBQ whole prawns served with a subtle elevation of lemon and pickled jalapeno, while others opt for swavoury flavours – think fish sauce caramel glazes coating the skin of charcoal grilled Hamachi collar and delectable charred octopus served alongside an eggplant jam. Likewise, there is a nod towards luxurious offerings with whipped roe emulsion and new takes on surf and turf – lamb and octopus, anyone?



Clockwise from top right: BBQ king prawns, with pickled jalapeño, preserved lemon and crispy leeks, **Lacalita** (Bali) || Hamachi collar & belly, charcoal grilled and brushed with fish sauce caramel, **Florette** (Toronto, Canada) || Charred octopus, lamb kabsa sauce, eggplant jam, **Gerard's** (Brisbane, Australia) || Charcoal octopus skewer with whipped roe emulsion and parsley dressing, **NOUR Restaurant** (Sydney, Australia)





SMOKED

Beyond the beloved smoked salmon that tops our morning cream cheese bagels, other fish varieties are also making their mark!

Bonito, for instance, smokes beautifully and pairs well with a creamy tonata sauce and salty capers. Meanwhile, the growing interest in premium tinned fish has introduced a smoked rainbow trout variety caramelised on the outside and buttery and flaky inside, pairing perfectly with a slice of heart-warming sourdough. Continuing the trend of premium offerings, anchovies (*aka the comeback kid of the year*), nowadays, we enjoy them smoked alongside cured tomatoes and fennel pollen. Furthermore, smoked cod roe presents a new flavour profile and texture, especially when topped with complementary zingy pickled cucumber!



Anti-clockwise from top left:
Celeriac and smoked bonito,
tonata sauce and fried capers,
Septime (Paris, France) ||
Smoked rainbow trout,
Fishwife (US) || Smoked
anchovy, cured tomatoes,
fennel pollen, sourdough,
MISIPASTA (Brooklyn, US) ||
Smoked cods' roe, **OMA**
(London, UK)



WOOD FIRED

A common theme throughout flavour bombs is the desire for smoky flavours.

Just like the appeal of charcoal and smoked cooking methods, wood-fired fish adds an extra layer of flavour to dishes. Some people prefer the intense smokiness of wood-fired octopus paired with smoked tomato sauce, while others enjoy it with herby pestos and the uplifting freshness of lemon and thyme. In addition to enhancing flavour, wood-fired cooking also adds a premium touch. Could we see an increase in pre-cooked wood-fired scallops as a luxurious starter for at-home dinner parties? Or perhaps a delicious wood-fired halibut served with comforting autumnal beans?

Clockwise from top left: Fillet of wild Amberjack, wood-roasted with Sicilian Clams, and fresh Borlotti beans, **Terrone Restaurant** (Malta) || Wood-fired octopus served on a bed of smoked tomato pasata, **Ina Ré** (Bali) || Woodfired halibut with basil-walnut pesto & apricot, **Guantonios** (California, US) || Woodfired Scottish hand-dived scallops, **Moro** (London, UK)

SWALTY

An increasingly favoured flavour combination is the balance of salty and sweet flavours.

Consider pairing the naturally delicate sweetness of scallops with the intense flavour of a Thai spiced smoked scallop caramel sauce. Oily fish can be beautifully complemented by stone fruits like plums and peaches. Additionally, a pancetta and onion jam sauce combines the saltiness of meat with the sweetness of slow-cooked onions - *delicious!*

tfp



Clockwise from top right:
Scallops with a Thai spiced smoked scallop caramel, **@cheflukefrench** (Chef, Instagram, UK) || Mackerel with grilled stone fruit, **Crabshakk** (Glasgow, UK) || Seared sea scallops with pancetta onion jam, **Stark's Steak & Seafood** (California, US) || Fish sauce caramel, **@mmbonappetit** (Instagram, France)



THOUGHT STARTERS

Swalty Sensation - A trend emerging across various food categories, swalty flavours continue to gain popularity in retail and restaurant spaces. In the fish and seafood industry, scallops pair with sweet caramels and fruity combinations such as peach and plum. As a result, retail looks to follow suit with a rise in fruity glazes for white fish; for instance, halibut paired with a strawberry glaze or tropical mango salsa could become more common.

Over Fire - Tapping into our primal instincts - there is a notable rise in cooking over fire. Techniques such as wood fire, charcoal, and smoking are gaining traction as consumers and chefs alike search for intense, smoky flavours to complement seafood delicacies. As a result, consumers seek outdoor experiences. For instance, retail lines of pre-seasoned whole sardines ready to be cooked on a firepit or BBQ.

Dry Age It - Traditionally used for beef, dry ageing has become a growing trend in the fish and seafood sector. While this technique is mainly trending among chefs with advanced equipment, its potential for retail markets looks to be significant.



BUTTER

Julia Childs famously said, “With enough butter, anything is good,” and we can certainly agree when it comes to the fish and seafood category!

Compound butter is becoming increasingly widespread for its ability to deliver quick and impactful flavour. Umami is a significant trend, with options like anchovy butter drizzled over crispy duck fat potatoes or salty seaweed paired with spiced prawns. There’s even room for unique combinations like Marmite and miso butter served with roasted oysters or chicken butter over delicate monkfish.

Traditional butter sauces are also trending! For example, the French classic *beurre blanc* served alongside poached sea trout and brown butter is a favourite for drowning Dover sole. Additionally, the classic combination of capers and seafood continues, offering a briny, savoury, and lemony flavour to these dishes!



BUTTER

BEURRE BLANC

ANCHOVY BUTTER

BROWN BUTTER

CAPER

SEAWEED

UMAMI

SPICED



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious

KEY REGIONS:



BEURRE BLANC

Beurre blanc is a classic, velvety, rich French sauce that pairs beautifully with fish and seafood.

Dating back to the 19th century, this warm emulsified butter sauce has seen many variations emerge over the years. While the traditional recipe remains popular, new flavour adaptations and unique pairings are taking centre stage. For instance, there is a growing trend of using burnt and smoked varieties, which add an extra boost of flavour to restaurant menus. Additionally, incorporating a squeeze of citrus or a spoonful of trout roe can give a compelling twist to the classic recipe. Chefs nowadays experiment with an ample range of seafood, moving beyond the typical white fish. Consider pairing beurre blanc with sea trout, dry-aged branzino, or tiger prawns for a refreshing change!

Clockwise from top left: Northland piper with a burnt butter beurre blanc, **kingi** (Auckland, New Zealand) || Grilled tiger prawns, served with citrus kosho beurre blanc, **Humpback** (Singapore) || Dry aged Branzino with a smoked beurre blanc, **Nudibranch Restaurant** (NYC, US) || Poached sea trout, braised leeks and trout roe beurre blanc, **Ox and Finch** (Glasgow, UK)





ANCHOVY BUTTER

Anchovies don't just adorn pizzas, salads, and sandwiches – they also bring a rich flavour to compound butter!

Savoury, salty, and incredibly simple, anchovy butter has steadily become a prevalent menu item in restaurants globally. Ideal for adding an umami-rich boost with ease, dishes include coating grilled prawns, enriching crispy duck fat potatoes and enveloping carby spaghetti pasta. In the future, we might even see pre-made anchovy compound butter on supermarket shelves, or it could be served atop premium steaks as a modern twist on the classic surf and turf trend.



Anti-clockwise from top left:
Grilled colossal prawns with white anchovy butter, **Salt Seafood & Oyster Bar** (New Jersey, US) || Crispy duck fat potatoes, turnip kimchi & anchovy butter, **Rick Shores** (Queensland, Australia) || Tagliolini with anchovy butter, **Legare** (London, UK) || Bruschetta with anchovy “tooth butter” and radish, **@elizabethonfood** (Instagram, Amsterdam)

BROWN BUTTER

Brown butter is a cooking technique that involves heating butter slightly beyond its melting point until the milk solids toast.

But why use this method? Well, the primary reason is the delicious flavour it imparts. Brown butter has a rich, nutty, and bold taste that adds significant depth, particularly to simple fish dishes. This technique has been utilized by chefs for a long time. However, to create more complex flavours, chefs often incorporate additional ingredients and methods. For instance, infusing the butter with seafood, combining it with spicy seafood sauces, or even cooking it until it reaches a burnt stage to achieve a unique flavour profile.

Clockwise from top left: Dover sole grilled over charcoal with brown shrimp butter, **The Gentleman's Table** (Surrey, UK) || Lubina with brown butter, **Chaval** (Portland, US) || Grilled oyster with XO brown butter, **Kiln** (Sydney, Australia) || Scottish grilled fish served with a burnt butter hollandaise, **The Pierhouse Hotel** (Scotland, UK)

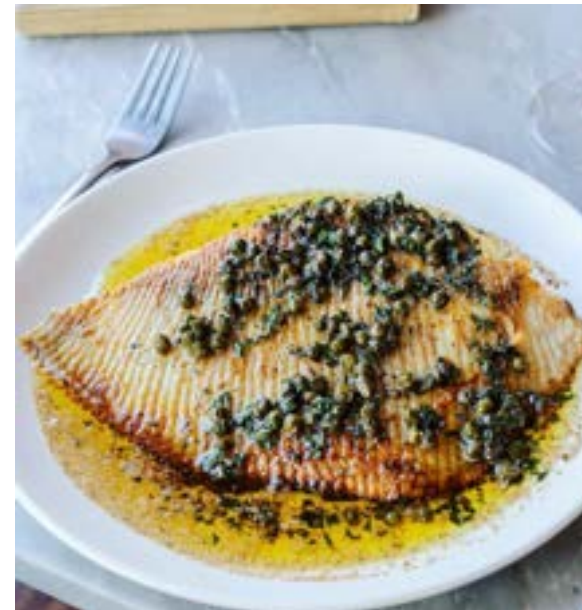


Clockwise from top right:
Hervey Bay scallops with a
lemon and caper butter,
Scopri (Carlton, Australia) ||
Whole lemon sole-brown
shrimp and caper butter,
Crabshakk (Glasgow, UK) ||
Skate wing and caper butter,
littlefrench (Bristol, UK) ||
Barra skate wing with caper
and samphire butter,
Crabshakk **Botanics**
(Glasgow, UK)

CAPER

Capers add a briny, savoury, and lemony flavour that complements the delicacy of fish and the richness of butter.

One dish that highlights this combination is Fish Piccata. However, the trend seems to be shifting towards paired-back preparations. Consider using only capers and butter, with an extra squeeze of lemon or perhaps the addition of salty samphire and the occasional shrimp for added flavour!





SEAWEED

In recent years, seaweed has emerged as a hero of the sea, offering a unique flavour dimension to your favourite fish dishes.

This year, seaweed butter trends paired with the simple sweetness and meatiness of prawns to effortlessly add a rich, umami flavour. In retail, consider pre-marinated seaweed butter prawns ideal for enhancing your midweek stir-fry or pasta dishes.



Clockwise from top left:
Grilled Ceylonese spiced prawns with seaweed butter, **Restaurant Sune** (London, UK) || Hibachi-grilled prawns, served in a rich kombu butter, **Cho Cho San** (Sydney, Australia) || Prawns with roasted Bladder wrack butter, **@jamielee_fiskebar** (Instagram, Denmark) || Giant papuan prawn and seaweed butter, **Mason** (Bali)



UMAMI

Umami and fat? What could be better?

As previously mentioned, anchovies are a significant trending ingredient incorporated into butter. However, there's also ample opportunity to explore other umami flavours, too! For instance, why not combine fermented soybean paste and marmite into rich butter to enhance dishes like black cod or take delicate oysters and up the ante with grilled miso and nori butter to add extra flavour dimension? The inclusion of meat is another significant trend. Monkfish pairs wonderfully with roasted chicken butter, providing a salty yet rich complement. Additionally, the spice, saltiness, and extra fat from sausage introduce an entirely new experience to the classic appetizer of oysters.

Clockwise from top left: Atlantic black cod with marmite and miso beer butter sauce, **Whyte's Restaurant** (London, UK) || Oysters with chorizo butter, **@chef_alejandro_najar** (Instagram, US) || Miso nori butter grilled oysters, Tony's **Seafood Restaurant** (California, US) || Monkfish tails with roast chicken butter, **@tommybanks** (Chef, Instagram, UK)

Clockwise from top right:
Australian Bay lobster with
chilli crab butter, **LANA
DINING** (Sydney, Australia) ||
Mussels with broccoli and
sriracha butter sauce,
@raff_szerszen (Instagram) ||
Warm Sydney rock oysters
with nduja butter,
@brent_savage (Instagram,
Australia) || Salmon with curry
leaf butter,
@sarahhuangbenjamin
(Instagram, Singapore)

SPICED

Finally, our butter trend reflects a growing preference for spicier flavours.

From a warming touch with the addition of curry leaves to a rise in heat levels with ingredients like chilli crab, sriracha, and nduja. This spice is particularly enjoyed when combined with the saltiness and often sweetness of seafood.



THOUGHT STARTERS

Ubiquitous Umami - Umami flavours add extra layers of richness when combined with butter, making them perfect for enhancing seafood dishes. Ingredients like seaweed, miso, and chicken provide an easy way to inject flavour with minimal effort. Could we see an increase in umami compound butter paired with fish in retail? For example, a seaweed butter-coated halibut ready for the air fryer or oven, or perhaps a miso butter that pairs beautifully with delicate scallops.

Spice Up Your Life (Butter) - In addition to umami, spicy flavours are also on the rise. Consider incorporating kimchi, sriracha, or nduja mixed with butter to finish your dishes! Just add this spicy butter towards the end of cooking for a flavour boost.



PREMIUM

Across all spheres of trends, consumers have consistently shown a desire for a touch of luxury, especially during times of economic hardship, also known as ‘The Lipstick Effect’.

In light of this, tinned fish have undergone a makeover featuring wild-caught octopus and sardines, all preserved in quality olive oil or squid in their ink.

Meanwhile, consumers increasingly look to recreate the restaurant experience or takeaway – known as fakeaway – at home. Cuts of Michelin-grade fish become available to home cooks, whilst chip shop-style battered cod specials bring the chippy to us.

Conversely, in restaurants, the classic Wellington is having a moment, swapping the beef fillet for ones of monkfish or even lobster. Oysters remain a simple but premium way to give a sense of occasion, as do scallops, both often being served raw or minimally dressed, emphasising quality.



PREMIUM

BOUGIE TINS

FAKEAWAY

RESTAURANT AT HOME

WELLINGTON 2.0

OYSTERS

SCALLOPS



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:



BOUGIE TINS

Whilst the cost of living continues to squeeze and the price of fresh fish increases, tinned options occupy a sweet spot between affordability and luxury.

Sea bass with fine herbs and piquillo peppers, wild octopus and wild-caught grilled boneless sardines, mackerel fillets and squid come swimming in quality olive oil. Squid also comes in its own ink, whilst mussels come in Galician sauce, tomato sauce or chilli-spiked sunflower oil. Ideal for keeping in the pantry to throw together with other staples like pasta, couscous or straight out of the tin!



Clockwise from top right: Branzino with olives & fine herbs, branzino with piquillo peppers & herbs, **Blue Cove Preserves** (US) || Wild-caught boneless grilled sardines in olive oil, **Trader Joe's** (US) || Wild octopus in olive oil, **Matiz** (Spain) || Squid in ink, squid in olive oil, mussels in Galician sauce, sardines in tomato sauce, sardines in spicy sunflower oil, mackerel fillets in olive oil, **Conservas Cambados** (Spain)





FAKEAWAY

Simulating the satisfaction of a takeaway, 'fakeaways' have become a fun, cost-effective way of adding some excitement to the week.

Oven-ready Thai green curry is ready in under 30 mins, boasting quality ingredients. The iconic 'fillet-o-fish' from McDonald's is replicated in a high-protein version using egg whites and Greek yoghurt tartare sauce, whilst the classic recipe is also widely used. Major brands recognise the 'fakeaway' trend by offering versions of typical chip shop orders with a 'jumbo cod special' that you can pop straight in the oven.



Clockwise from top left: Thai green cod curry, **Fish Said Fred** (UK) || High-protein fillet-o-fish, **@_aussiefitness** (Instagram, Australia) || Chip shop jumbo cod special, **Young's** (UK) || Fillet-o-fish, **@Brendan_pang** (Instagram, Taiwan)

RESTAURANT AT HOME

Despite the popularity of bougie tinned fish and ‘fakeaway’ meals, consumers look for moments of luxury elsewhere, desiring the restaurant experience from the comfort of their own homes.

To this end, restaurant suppliers of Michelin-star quality fish have brought their fare to the common market, with fish caught using ancient Japanese fishing methods, complete with QR codes to prove its traceability. Steamed mussels come ready to eat from Spain, the iconic seafood boil can be put in a pan and ready in no time, whilst premium cod loins come ready to add to whatever you fancy, saving you money enough to give yourself a tip!



Clockwise from top right:
Steamed mussels with tomato & garlic, **Aquamar** (US) ||
Seafood boil, **Trader Joe's** (US) || Atlantic MSC cod loin, **Brakes** (UK) || Black cod, **Seremoni** (US)





WELLINGTON 2.0

However, when it comes to restaurants, the recent resurgence in French classical cooking might continue, but we're also seeing a twist on an iconic British dish - the Wellington.

To compensate for the use of beef, meatier fish and shellfish such as lobster and monkfish take their place, served in classically elaborate ways. From pithivier-like takes in beurre blanc sauce, Tudor-esque riffs mimicking a whole lobster complete with the head and tail to the classic recipe otherwise observed to the letter, these versions of the Wellington may be fundamentally different, but still maintain the fundamental sense of occasion.



Anti-clockwise from top left:
 Lobster Wellington, **Falsled Kro** (Denmark) || Lobster Wellington, **Claridge's Hotel** (London, UK) || Monkfish Wellington, **Lune** (Massachusetts, US) || Monkfish Wellington, **Heathcock** (Cardiff, Wales)

Clockwise from top right:
Pembrokeshire oysters,
preserved rhubarb & pickled
shallot, **Manifest** (Liverpool,
UK) || Oyster bar pop-up with
Lindisfarne oysters, **The One
O'Clock Gun** (Liverpool, UK)
|| Kyss oysters with
watermelon & tomato oil,
Frieda (Berlin, Germany) ||
Grilled oyster with spinach
cream, **Cañabota** (Seville,
Spain)

OYSTERS

Synonymous with the upper echelons of dining, oysters are another classic that continues to trend, but with some twists.

Preserved rhubarb and pickled shallot take the typical mignonette to another level. Watermelon and tomato oil offer more mellowed acidity and sweetness. For more gastronomic takes, pastry casings are made to look like actual shells, stowing a grilled oyster sculling in spinach cream purée.

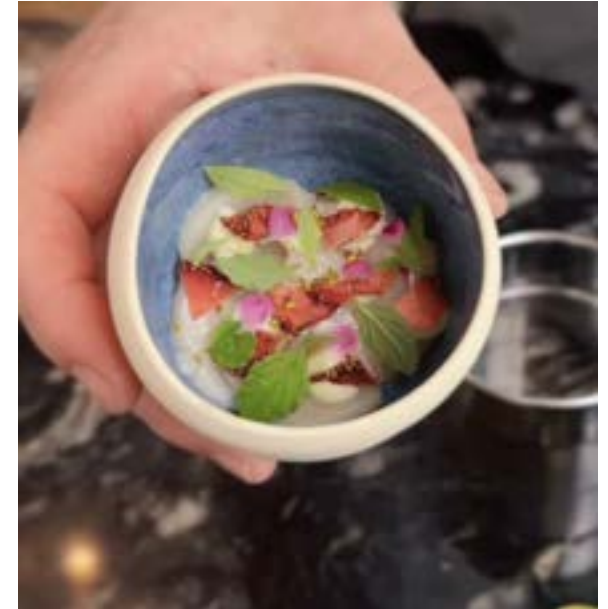


SCALLOPS

Similarly, scallops remain among the top-tier shellfish options, with many dishes opting to keep them raw, thereby showcasing their quality.

Seasoned with beeswax and scallop roe fudge, delicate slivers of scallop are finished with a nasturtium and marigold flower hot sauce. The funk of aged cow fat emulsion offers a unique take on surf & turf, cut with unripe strawberries and verbena. Likewise, a scallop crudo comes piled with strawberry & pepper relish and finished with strawberry vinegar and ash oil. Orange-cured scallops are sliced thin, splayed over orange aioli, covered with preserved kumquats and dotted with edible flowers.

tfp



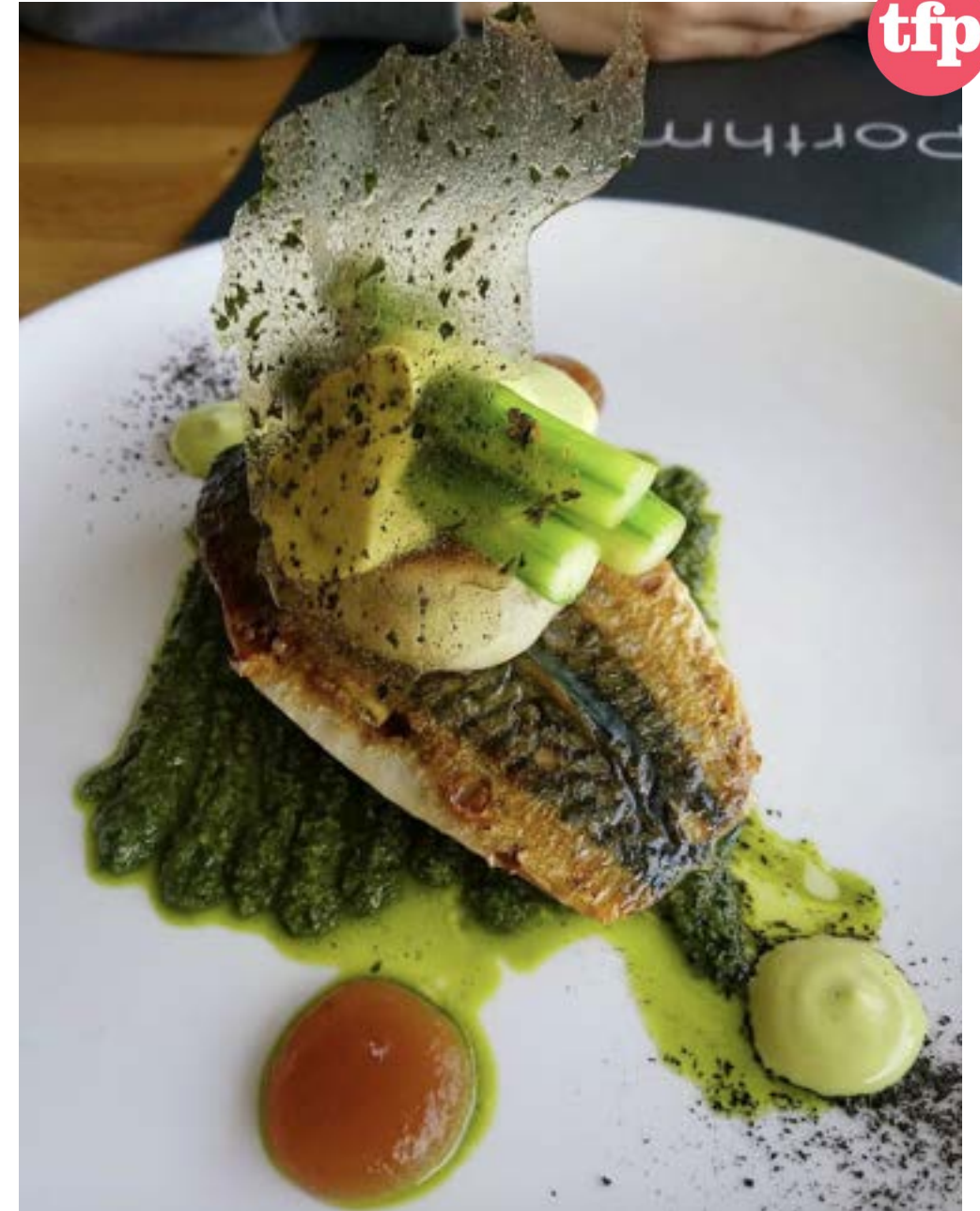
Clockwise from top right: Raw hand-dived scallop seasoned with beeswax & scallop roe fudge, dressed in a nasturtium & marigold flower hot sauce, **Restaurant Pine** (Northumberland, UK) || Norwegian scallops, aged cow fat emulsion, dried unripe strawberries, verbena & cloves, **Mota** (Denmark) || Scallop crudo, local strawberry & pepper relish, strawberry vinegar & ash oil, **The Hackney** (North Carolina, US) || Orange-cured scallop crudo, **Yellowtail** (NSW, Australia)

THOUGHT STARTERS

Tinned Treasures – With the rise in quality tinned fish and the desire for a little luxury at home to save on dining out, think of ways to exploit this sweet spot. Think tinned paella seafood mixes in a chorizo and fish stock!

A Bit of Welly – Wellington's using lobster and monkfish still gives the sense of occasion that beef does, but as "snackification" becomes prevalent, why not make them bite-sized?

Shell Out – Oysters and hand-dived scallops are some of the most sustainable proteins we have in the UK. With their unique flavour and texture, they aren't for everyone, so enticing consumers is key. Think Southern fried nuggets!



MADE, NOT CREATED

There's a dichotomy when it comes to fish and seafood. Although we look to our oceans for protein sources to offset intensive farming, sustainability matters become more prevalent.

To this end, technology companies are once again making strides in innovation to safeguard our food supplies. By taking the cells of heavily overfished halibut and bluefin tuna and cultivating them in a lab, they are given a breeding reprieve.

Grouper fillets and even fish sticks of trout are subject to this, offering hope to both the world food supply and the environment as a whole. Conversely, as plant-based solutions continue to improve in both texture and flavour, imitation tuna, salmon and even squid come to the market, along with tinned 'fish'. Kelp becomes the focus for even more lab breakthroughs, unlocking the potential of untapped kelp species.



MADE, NOT CREATED

FIN TEC

PLANT-BASED

EVERY LITTLE KELPS

TOMATO TUNA

ALTS



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living || Evolve Smarter

KEY REGIONS:



FIN TEC

As the prospect of food insecurity looms large, along with environmental and sustainability concerns, the technological sector is being looked to for solutions.

Thankfully, significant advances in this space have led to the ability to cultivate fish from cells, producing fillets of grouper and fish sticks of trout, along with the heavily over-fished halibut and bluefin tuna. Singapore is also collaborating with the UK which sees these initiatives brought to our shores at a time when they're perhaps needed the most.



Clockwise from top right:
Cultivated halibut fillet, **Atlantic Fish Co.** (US) ||
Cultivated bluefin tuna, **Wanda Fish** (Hebron, Israel) ||
Grouper fillet cultivated from stem cells for UK market **UMAMI Bioworks** (Singapore) ||
Fish sticks cultivated from trout cells, **BLUU Seafood** (Hamburg, Germany)





PLANT-BASED

It follows, then, that plant-based alternatives are also proliferating, as many consumers seek to divest themselves from the commercial fishing industry.

As with many plant-based alternatives, issues around texture and flavour have been major problems which appear to be increasingly overcome. Blends of konjac flour, salt, locust bean gum and trehalose result in realistic versions of squid, salmon and tuna. Meanwhile, substitutes for snow crab and smoked whitefish come in tins for convenience and shelf life, along with flavour and texture. Plant-based salmon and tuna mean you can load up crackers and sandwiches without compromise, whilst shrimp alternatives can be thrown into steaming bowls of noodles.



Anti-clockwise from top left: Plant-based shrimp alternative, launching in the UK, **HAPPIEE** (Singapore) || Plant-based smoked salmon, **Hooked** (Sweden) || Plant-based squid, salmon & tuna, **Azuma Foods Co. Ltd** (Japan) || Plant-based tinned “snow crab” and “smoked whitefish”, **Whole Foods** (US)

EVERY LITTLE KELPS

It might seem that our oceans need a break, yet they continue to give, with various algae providing us with innovative food solutions.

The 'Novel Compound Discovery in Newly Domesticated Alaskan Kelp' initiative aims to explore and commercialise ingredients derived from lesser-known Alaskan kelp species such as dragon, spilt and kelp. A vegan alternative to hot smoked salmon utilises European organic seaweed, field bean and pea proteins, textured vegetable protein, oat straw fibre and sweet potato concentrate. Kelp also provides a nutritional base for favourites such as marinara and pesto.



Clockwise from top right:
Funding secured to explore the benefits of dragon, split and bull kelp for regenerative macroalgae farming, **Marine Biologics** (US) || Sea asparagus pesto, **Foraged & Found** (Alaska, US) || Kelp marinara, **Foraged & Found** (Alaska, US) || Sal-nom: Salmon substitute made from kelp, **Bettaf!sh** (Germany)





TOMATO TUNA

But access to a lab, along with government or private investment, isn't totally necessary to create satisfactory alternatives to fish.

A recent viral sensation has seen the humble tomato assume the role of tuna with some scope in variation. A simple tomato concassé is marinated in umami with soy, miso and tamari, with some opting for kombu and dried shiitake mushrooms to be vac-packed for intensified flavour. Served over rice as nigiri or mock sushi rolls or simply cut into chunks with chickpeas and vegan mayonnaise in a sandwich, tomato tuna makes a handy snack.



Anti-clockwise from top left:
 Vegan tuna sushi made from tomato, [@mensch.chef](#) (Instagram, UK) || Vegan "tuna" chickpea sandwich with serrano chillies, onion & vegan mayo, [@dorastable](#) (Instagram, US) || Tomato "tune" nigiri, [@veganbunnyelle](#) (Instagram, US) || Tomato "tuna" rolls, [@chefmarisabagette](#) (Instagram, US)

ALTS

Fish and seafood alternatives aren't just limited to flesh, but caviar and truffle, as consumers desire premium options in the alternative space, too.

Lab-grown caviar uses sturgeon cells, stabilised with mushroom-derived mycelium, whilst tonburi – derived from dried seed summer cypress *Kochia Scoparia* and single-sourced from the Akita prefecture of Japan – provides a vegan alternative. Meanwhile, the sought-after flavour of truffle can be found in seaweed, specifically *Codium Blue*, offering that premium touch for a fraction of the price.

tfp



Clockwise from top right:
Mycelium caviar, **Optimized Foods** (California, US) ||
Yellowtail kingfish turnip greens gooseberry with *Codium Blue*, **Koppert Cress** (Netherlands) || Tonburi with avocado, cucumber & mint, **Eleven Madison Park** (New York, US) || Seaweed caviar, **Hedgehog's Kitchen** (Instagram, US)

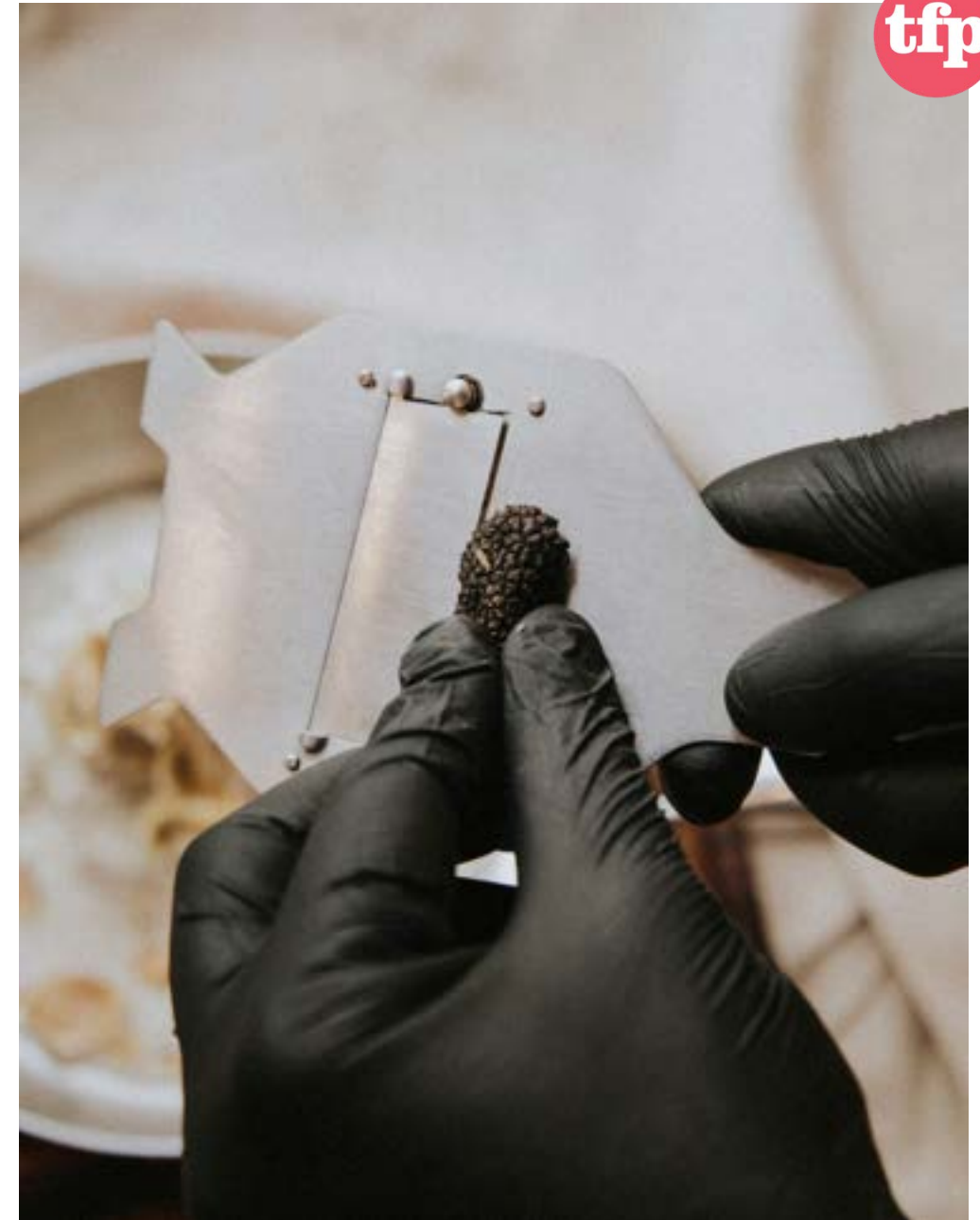


THOUGHT STARTERS

A Little Kelp Along the Way – If pesto and marinara can benefit from kelp, then this has huge implications for pizza, which itself is trending. Thinking more widely, Green Goddess sauce, Thai green curry and ragù's could all get this nutritional benefit whilst boosting the seasoning and umami.

Making Gains – With the gym and general fitness culture continuing to shape our diets and lifestyles, lean proteins are ideal for many. Combined with increasing consumer concerns surrounding sustainability and environmental impact, the fitness market is a prime target for these innovations.

Codium Blue – Echoing these environmental concerns along with the cost of living, Codium Blue's ability to replicate the flavour of truffle could be a gamechanger. Think about dehydrating for intensified flavour and even shaping into truffles that can be grated and shaved in the same way.



STEALING THE LIMELIGHT

Recently, the most showcased choices of fish and seafood have, somewhat surprisingly, been deeply established favourites coming to the fore.

Sparkling fresh mackerel are slightly blowtorched and simply, yet resourcefully served in olive brine and slaked in good olive oil. Tinned versions are thrown together with chilli and a few bits to be served on cucumber as a canapé meanwhile, a traditional Russian dish of smoked mackerel goes viral.

Umami-packed anchovies get a similar treatment on Jenga blocks of brioche whilst also being paired with sage leaves and fried in a tempura chrysalis. Tuna features heavily often being served raw – again, a way of championing its quality. Caviar and roe continue to add spoonfuls and bumps of luxury, from sturgeon to tobiko to vegan-friendly!



STEALING THE LIMELIGHT

MACKEREL
SARDINE
ANCHOVY
CRAB
TUNA
CAVIAR & ROE



tfp

TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:



MACKEREL

For chefs such as Rick Stein, Nathan Outlaw and beyond, mackerel is one of the best fish for flavour and texture, as well as being native to the UK.

Tinned or fresh, mackerel is favoured for its unctuous, firm flesh that can stand up to both heat and bold flavours. Served lightly blow torched in Gordal olive brine and slaked in good olive oil or as a crudo with tomato seed and seaweed, fresh mackerel makes a stunning starter. Similarly, tinned mackerel in tomato sauce can be thrown into a bowl with chilli, onion, fish sauce and lime to be served on cucumber slices as a canapé. Meanwhile, the viral trend for the traditional Russian dish of smoked mackerel has opened up the versatility of this fish to a whole new generation.



Clockwise from top right:
Mackerel crudo, **Babel**
(Copenhagen, Denmark) ||
Russian smoked mackerel viral
trend, **@fadenrock2**
(Instagram, US) || Cucumber
canapés made with mackerel
in tomato sauce with chilli,
shallots, spring onion, fish
sauce & lime,
@cookingwith_yui
(Instagram, UK) || Torched
mackerel in Gordal olive brine
& olive oil, **Saint Peter** (NSW,
Australia)





SARDINE

Another fish common to UK shores and many others, the sardine appears to be enjoying a similar comeback.

Again, oily, firm and able to stand up to big flavour, sardines with hair-fine bones can be eaten whole by many. Grilled and served with sour fruits like gooseberries, nectarine or softly-sweet peach to cut through the unctuousness, or piled on whipped ricotta with pickled onion, olives and grated Manchego, to simply mounted on toast rubbed, sardines can be as much of a quick snack as they are highly-finessed works of art with the macros to match!



Anti-clockwise from top left:
Grilled sardines with green star fruit, green mango, sour gooseberries, cashew salad & a pounded dressing of kee nu and orange chillies, **Kolae** (London, UK) || Grilled sardines, borlotti beans, peach & tomato, **Erst** (Manchester, UK) || Sardine toast, whipped ricotta, pickled onion, oil cured olives & grated Manchego, **Cardinal Provisions** (New Jersey, US) || Sardines on toast, **St. Ali & The Queen** (Melbourne, Australia)

ANCHOVY

Whereas anchovies occupy a unique space when it comes to application, owing to their deep umami qualities that provide the moreish base to classic dishes such as Puttanesca.

Straight from the tin they can be laid simply on toast or Jenga blocks of focaccia rubbed with tomato and garlic, to brioche adorned with dill, chive and pickled cucumber. Conversely, anchovies can be laid on sage leaves, dipped in a light batter such as tempura and deep-fried for an elevated but comforting snack, complete with a stalk to lift them by!



Clockwise from top right:
Anchovy & sage fritters, **Cutler** (Victoria, Australia) || Garlic-rubbed toast topped with crushed tomatoes, anchovies, extra virgin olive oil, **@dougrattner** (Instagram, US) || Anchovy brioche, dill pickle & chives, **Dear Sainte Éloise** (Sydney, Australia) || Tomato focaccia, Spanish anchovies & chives, **Alta Pizza** (Kuala Lumpur, Malaysia)





CRAB

Crab is also uniquely placed as an ingredient, as the distinctly sweet, pearly white flesh is also paired brilliantly with the darker head meat, often made into mayonnaise or other dressing.

Notoriously fiddly to crack open and reach every morsel, this labour of love has been recognised and streamlined, with bags of lump and claw meat now readily available. Able to be deep-fried whole, softshell crabs are ideal for sandwiches, bolstered with sauces of curry or sweet chilli. More elegant takes include verdant purées of pea and garlic with ribbons of spring onion whilst other restaurants make crab a Sunday event, paired with various Chablis.



Anti-clockwise from top left:
Fried softshell crab, pea & garlic purée, spring onion, coriander & lemon, @the_whisky_hallows (Instagram, US) || Sunday Crab Series; crab with Chablis pairings, **Cirrus** (Barangaroo, Australia) || Softshell crab burger with sweet chilli or mild curry sauce, **Dom Dom Hamburger** (Japan) || Claw crab meat, lump crab meat, **Gourmet Hound** (London, UK)

TUNA

As we've seen, there is seldom a better testament to the quality and flavour of fish and seafood than being served raw, with tuna appearing to be no exception.

Again, another firm-fleshed fish with a distinct flavour, tuna is being served with grapefruit fennel and capers, or confit red pepper, fermented raspberries, marigold and chilli. Similarly, more subdued flavours elevate this premium fish such as tomato and mint, but with a burst of coriander. Meanwhile, more complex dishes see coconut cream, sesame, ginger, lemongrass ginger and basil, served with a valleyed rice paper puff.

tfp



Clockwise from top right: Raw tuna, ruby grapefruit, fennel & caper, **Gimlet and Cavendish House** (Melbourne, Australia) || Raw line-caught tuna & confit red pepper, fermented raspberry paste, marigold & chilli, **Septime** (Paris, France) || Raw Cornish bluefin tuna, tomato, mint & coriander, **Outlaw's Fish Kitchen** (Port Isaac, Cornwall) || Itsumo tuna, sesame, coconut cream, lemongrass, ginger, puffed rice paper & basil, **Oddbird** (Ontario, Canada)

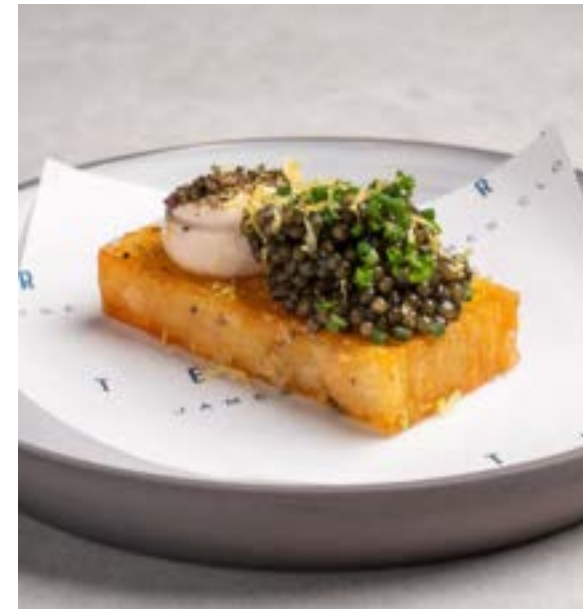




CAVIAR & ROE

In-line with the ongoing consumer desire for premium ingredients and experiences, caviar and roe trend.

A familiar favourite, the BLT gets a touch of surf & turf with a healthy dollop of caviar, as does the classic lobster roll, elevated further with celeriac remoulade in a Parker house bun. The iconic club sandwich gets more than a bump, featuring a thick layer equal to the ratio bread. Meanwhile, more dainty takes still promise to satisfy, with a crispy pave topped with a puck of cod roe and a mound of caviar. Able to inject a sense of occasion instantly, the caviar and roe bubble shows no sign of bursting any time soon.



Anti-clockwise from top left:
Caviar BLT, **Middle Child Clubhouse** (Pennsylvania, US) || Maine lobster, herbed celeriac remoulade & caviar in a Parker house bun, **The Corner Store** (New York, US) || Grilled club sandwich with ricotta & Volzhenka caviar, **Staff Meal** (France) || Cod roe & caviar pave, **The Rockcliffe** (Yorkshire, UK)

THOUGHT STARTERS

Cash Crab – Extracting crab meat is a fiddly business, so with it now being made available in handy packs, it's good news all around. But, as ever, what about the shells? Including a sachet of sauce made from them would be something that you could bake into the cost, saving waste and making extra profit in the process.

Roe, There! – With the advent of vegan “fish” sauce and the rise of various caviars, with a couple of additions such as kombu and saline water, why not consider using this to create a new line of vegan caviar?



SURF 'N' TURF

A timeless combination, surf & turf brings together the fat and flavour of land animals to the typically leaner proteins of the seas and waterways.

Aged pork fat underscores the sweetness of lobster; adobo crab is laden with lardo in a sauce enriched with egg yolk; foaming chicken skin butter gives a roasted umami flavour with which to finish roasted scallops.

The intrinsic fattiness of lamb pairs classically with anchovies, whilst the iconic Gilda gets reworked with crispy pressed lamb belly. Lacey beef smash burgers are piled high with prawns dripping in chilli oil and wild garlic pesto.

A beef tartare comes with aged beef oil, whipped smoked bone marrow & Oscietra caviar. Prawns roasted in the shell are bloodied with the smouldering unctuousness of 'nduja, whilst a sausage of diver scallops, trout & cod roe is spiced with lardo.



SURF 'N TURF

FAT
PORK
CHICKEN
LAMB
BEEF
SAUSAGE
WING IT



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

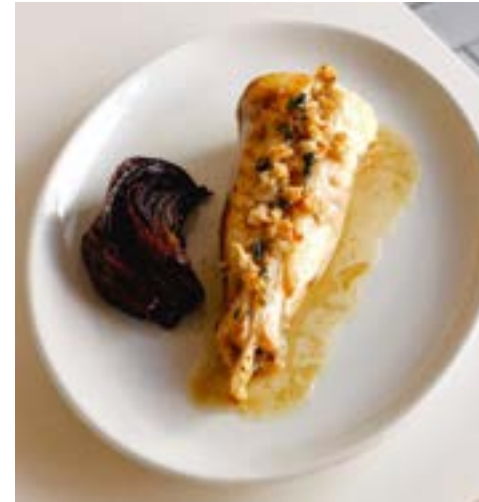
KEY REGIONS:



FAT

It's no secret that fat is flavour, whether in the form of butter, tallow or the oil in a deep fat fryer.

With a characteristic of many fish being that of a lean protein, the use of fat not only offers a way to keep things plump and moist but also presents an opportunity to deepen the flavour profile. To this end, riffs on the classic surf & turf often arise. The smokiness of a barbecued lobster is carried further aloft on a chunk of grilled sourdough soaked in lobster emulsion and aged pork fat. Adobo crab comes in a foaming sauce bolstered with egg yolk and draped with a slick, translucent layer of Iberico lardo, whilst similarly, a pearly cudgel of monkfish on the bone has been kept succulent with the addition of whipped lardo, along with a sweet roasted onion. The legendary St. John does an archetypal take on fish and chips with whole deep-fried plaice, ketchup and potato cakes cooked in beef dripping!



Clockwise from top left: BBQ Lobster on grilled sourdough soaked in its own emulsion with aged pork fat, **Skof** (Manchester, UK) || Deep-fried plaice, ketchup & potato cake cooked in beef dripping, **St. John** (London, UK) || Adobo crab with Iberian lardo, **Mana** (Manchester, UK) || Monkfish, whipped lardo & onion, **Prawn on the Lawn** (Cornwall, UK)

PORK

As we've seen with lardo, the inherent fat content of pork makes it ideal for pairing with often lean seafood and fish.

Chunks of lobster claw and fatty pork belly are skewered and grilled, glazed with yuzu koshu finished with furikake and fresh spring onion. Tiger prawns take on Thai flavours as a dish of nam prik lon, mounded with minced pork, pooled in coconut cream, funky with shrimp paste and heady with lemongrass. Giant prawns are sauced in the smoulder of 'nduja, tempered with lime juice.



Clockwise from top right:
Lobster claw & pork belly skewer, yuzu koshu & furikake, **Nord** (Liverpool, UK) || Nam prik lon with tiger prawns with a sauce made of minced pork cooked in coconut cream with shrimp paste & lemongrass, **Old Boy** (Brussels, Belgium) || Giant Papuan prawns, 'nduja lime jelly, **Bar Vera** (Bali, Indonesia) || Stir fried north Queensland tiger prawns, ground pork neck, Thai cluster beans, shrimp paste & lime juice, **Paste** (NSW, Australia)





CHICKEN

The umami of caramelised chicken works wonders when it comes to fish and seafood.

Pan-roasted scallops finished with chicken skin butter take on an immeasurably deep flavour profile, with added texture coming from a final sprinkle of crushed chicken skin, whilst other recipes use the mild sweetness of corn and the nuttiness of brown butter. Meanwhile, the low-high trend for fried chicken and caviar continues with brown butter emulsions and, what else, but Champagne.



Anti-clockwise from top left:
 Scallops with chicken butter & crispy chicken skin, **@thomas_straker** (Instagram, UK) || Buttermilk fried chicken, brown butter & Oscietra caviar, **Heaneys** (Cardiff, Wales) || Scallop, corn, chicken skin, beurre noisette, **Peats Bite** (NSW, Australia) || Fried chicken, Champagne & caviar, **Essa** (Queensland, Australia)

LAMB

As with pork, where there's lamb, there's fat – and plenty of it – making it another ideal choice for fish and seafood.

A simple anchovy sauce seasons a slow-cooked shoulder of lamb or a couple of chops, with an emollient slick of ricotta. whilst pressed chunks of crispy lamb belly are mounted onto skewers with pickled peppers and olives, creating a new take on the ever-popular Gilda. The honeyed umami of olive caramel glazes a lamb shoulder and served atop a bowl of chickpeas, pickled garlic and glossed with anchovy butter.



Clockwise from top right: Lamb shoulder with anchovy butter, **Chez Nous** (South Carolina, US) || Lamb belly Gildas - pressed lamb breast, smoked anchovy, guindilla & gordal olive, **Alberta's** (Brighton, UK) || Lamb, anchovy sauce and a 'vignarola' medley of spring vegetables & ricotta, **Saturday Kitchen** (UK) || Olive caramel glazed lamb shoulder, braised chickpeas with pickled garlic & anchovy butter, **Clover** (Melbourne, Australia)





BEEF

From smash burgers to tartare, beef is uniquely placed when it comes to complimenting fish and seafood.

A custard infused with seaweed can be served with a layer of beef broth and bone marrow, along with a blend of oysters and caviar. Sticky Hoshikihari rice is mounded with lobster, salsa macha and finished with grated beef heart. Aged beef tartare dressed in aged beef oil and the umami of mushroom garum is served with whipped bone marrow and Oscietra caviar. Meanwhile, a smash burger is laden with garlic & chilli marinated shrimp, drizzled with a wild garlic pesto, paprika mayonnaise and chilli oil crunch.



Anti-clockwise from top left: Seaweed custard, beef broth and bone marrow, Maldon oysters & caviar blend, **L'Enclume** (Cumbria, UK) || Smash burger with black tiger shrimp marinated in garlic & chilli oil wild garlic pesto, garlic paprika mayo & chili crunch oil, **Burgermeister** (Germany) || Hoshikihari rice, lobster, beef heart & salsa macha, **Llama San** (New York, US) || Aged Cumbrian beef tartare dressed in aged beef oil & mushroom garum, whipped smoked bone marrow & Oscietra caviar, **The Forest Side** (Cumbria, UK)

SAUSAGE

A delicious blend of fat and lean, sausage plays perhaps an unsurprising role in surf and turf dishes.

Octopus gnarled with char from the grill is complimented with the paprika-stained, spicy fats of chorizo in the same way mussels come packed with 'nduja rice, finished with a line of lemon aioli. A sausage made of scallop, trout, cod and lardo is cooked to burnished, snappable perfection in a clear broth of tomato along with globules of olive oil and an obsidian eyot of black garlic ketchup.

tfp



Clockwise from top right:
Octopus with shishito, cilantro, & Iberico chorizo sauce, **Alder** (Ontario, Canada) || Mussels filled with 'nduja rice & topped with lemon aioli, **San Sabino** (New York, US) || Baby octopus, confit potato, chorizo & espellette, **Omnia Bistro & Bar** (Victoria, Australia) || Sausage stuffed with diver scallops, trout, cod & lardo, tomato broth & black garlic ketchup, **Orasay** (London, UK)





WING IT

Labour-intensive but a worthwhile return on investment, stuffed chicken wings trend, with a myriad of variations possible.

Plump with a prawn mousse and scattered with chive or finished with black garlic. Others bulge with a Lao chicken rice sausage, glazed in a reduced chicken broth and cut with a burnt pineapple jaew and pickled pineapple. Meanwhile, other iterations are glazed in fish sauce caramel and flecked with toasted sesame seeds. Stuffed chicken wings are a great answer to taking a cheap cut and maximising flavour – as well as profit.



Anti-clockwise from top left:
 Chicken wings stuffed with prawn mousse, **Tokki** (Auckland, New Zealand) ||
 Chicken wings stuffed with Ofada rice & butter poached lobster with tamarind butter sauce, **Ajoje** (Nigeria) ||
 Stuffed chicken wing with black garlic, **Askr** (Edinburgh, Scotland) ||
 Prawn-stuffed chicken wings, **Bağlami** (Mumbai, India)

THOUGHT STARTERS

Tastes Like Chicken (Sandwiches) – Chicken-fried steak is a popular dish in America and, as we look to fish to close the gap on quality sources of protein, why not make it interesting with chicken-fried fish?

Wing and a Layer – We've seen the popularity of chicken wings stuffed with prawn and lobster, so why not langoustine or salmon mousse with some lemon zest and flecks of fresh chilli? Or maybe morcilla and deep-fried, served with apple and jalapeño relish!



FLAVOUR

As with any dish, it's all about balance and when it comes to fish and seafood, there's a myriad of ways to achieve this, from the obvious to the more esoteric.

With its understated way of implying other flavours, florality is a commanding element in fish and seafood dishes. The zesty qualities of bergamot; the sweetly-soured notes of hibiscus and elderflower to the stark tartness of green strawberries – all of which either help to cut through the oils of fish or compliment its sweetness, particularly when raw.

Hot honey continues to trend in earnest, whether it be in crayfish rolls or Chipotle-fried lobster. Mandarin, yuzu, apple and lime give fresh bursts of acidity to pink snapper and trout crudo. The classic fish & chips seasoning salt & vinegar is applied to raw mackerel. Pickled daikon gives an acerbic bite to roasted octopus. The booze in bourbon and cider is burnt off to compliment Chipotle butter oysters and mussels respectively.



FLAVOUR

FLORAL

HOT HONEY

CITRUS

VINEGAR & PICKLED

ALCOHOL

FRUITY

CORN



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:



FLORAL

Whether subtle or strong in flavour, fish and seafood invariably pair beautifully with floral notes.

Sturdy slices of kingfish easily take on the zest of bergamot, with its sweetly sour and slightly bitter tones, along with the anise scent of rosemary. Similarly, sea bass stands up to the ethereal zing of hibiscus and tang of cape gooseberries. The unctuous qualities of mackerel give an ideal fatty background with which to carry the sweetness of elderflower, whilst raw scallops can handle the tartness of green strawberries and the comparatively mellow notes of marigold.



Clockwise from top right:
Kingfish crudo, hazelnut butter, bergamot oil & rosemary, **Jane** (Sydney, Australia) || Royal sea bass crudo 🐟
cape gooseberries, wasabi tobiko, Thai bird chilli & hibiscus ponzu, **Arden** (New York, US) || Lightly salted mackerel, Sungold tomatoes, tomato water & elderflower dressing, **Roots** (York, UK) || Raw diver scallop, green strawberry & marigold, **Ploussard** (London, UK)

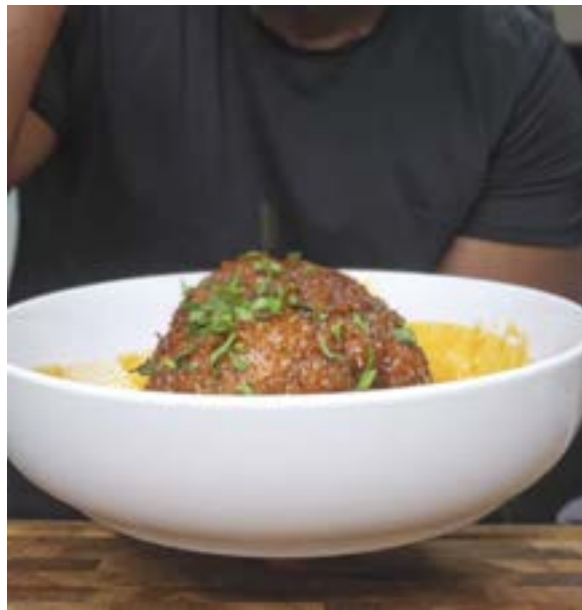




HOT HONEY

Unrelenting in its ubiquity, hot honey seems to span just about every ilk of food and drink, with fish and seafood being no exception.

Crayfish rolls, complete with tender but toothsome butterhead lettuce and anise fennel fronds, are laced with hot honey that gives a sizzle of interest, as do clusters of crispy chilli honey over simply cooked wild red prawns. The smokiness of a Chipotle-fried lobster pairs effortlessly with hot honey, whilst briquettes of crispy rice loaded with spicy tuna, jalapeño, spicy mayonnaise easily take on a finishing drizzle of hot honey, too.

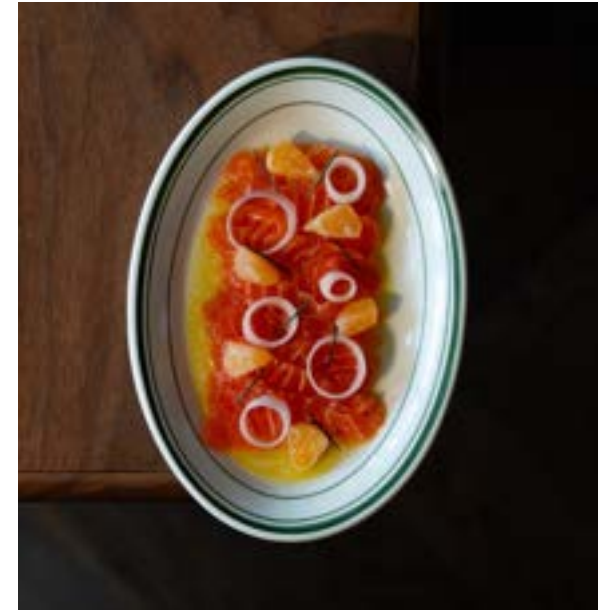


Anti-clockwise from top left:
Hot honey crayfish roll, **Pepper & Me** (Tauranga, New Zealand) || Wild red prawns, crispy chilli honey, **Prawn on the Lawn** (Cornwall, UK) || Hot honey Chipotle-fried lobster, **@chef.kennyeats** (Instagram, US) || Crispy rice, spicy tuna, jalapeños, ponzu & spicy mayo, hot honey, toasted sesame seeds, & green onions, **Rock n Roll Sushi** (US)

CITRUS

We've seen how readily fish and seafood can take on the implied notes of citrus fruit, but their pairing with actual fruit is famously classic also, especially when served raw.

Pink snapper crudo is served with mandarin, set against the brine of Sicilian olives and the bite of red onion. Similarly, luxe Petuna trout crudo is plated with mandarin, pickled shallot and the citrus notes of Geraldton Wax. Hand-dived scallops find a classic accompaniment in yuzu and Hamachi crudo works harmoniously with apple and lime.



Clockwise from top right: Pink snapper & mandarin crudo, Sicilian olive brine & red onion, **@joelbennetts** (Instagram, UK) || Petuna trout crudo, mandarin, pickled shallot and Geraldton wax, **Osteria Renata** (Victoria, Australia) || Hand-dived scallops, yuzu & sweetcorn, **Lucky Cat by Gordon Ramsay** (London, UK) || Hamachi crudo, ginger-lime dressing, radish & apple, **Rolo's** (New York, US)



VINEGAR & PICKLED

Acidity plays a key role in fish and seafood, with its ability to cure, impart flavour and often provide the ideal foil to the inherent oils of some fish.

Mackerel is an ideal example, served simply with salt and vinegar and sauced with good olive oil. Bluefin tuna can be marinated in tamarind vinegar and served with a ginger kerabu sabayon, finished with a spoonful of caviar and gold leaf. Roasted octopus served with creamed kale, wakame and nori dressing needs the bite of pickled daikon for balance and texture. The pickled cranberries offer a refreshing accompaniment for fresh oysters rather than a classic mignonette.



Anti-clockwise from top left:
Salt & vinegar mackerel with olive oil, **Terrone** (Malta) || Bluefin Tuna marinated with tamarind vinegar, ginger kerabu sabayon & Kristal caviar, **Seroja** (Singapore) || Roasted octopus with creamed kale, pickled daikon, wakame and nori seaweed dressing, **Continental Deli Bar Bistro** (Sydney, Australia) || Cranberry Island Oysters from Maine, rose hips, pickled cranberries, shallots, EVOO, **Wulf's Fish** (Massachusetts, US)

ALCOHOL

Perhaps somewhat misleadingly, alcohol is typically added to dishes with a view to burning it off, thereby leaving behind the essential flavours, usually as a way of adding sweet, often floral, notes.

The classic pairing of cider or white wine with mussels and a dash of cream or touch of butter results in a creamy broth that also helps keep them plump and juicy. The pop of salmon roe is given a kick of depth when cured in sake, offering a robustness that pairs with miso cod and wasabi roe. Bourbon might seem like a strong pairing for the saline delicacy of oysters, but when grilled, its sweet and smoky notes remain – ideal with some added Chipotle.



Clockwise from top right:
Mussels, hard cider broth & Osetra Caviar, **Black Radish** (California, US) || Chilean mussels, mussel emulsion, white wine & leek Oil, **Seva** (San Juan, Philippines) || Miso cod, pink radish, salmon roe cured in sake & mirin, crab, wasabi roe & furikake, **@suitcasewine** (Instagram, US) || Chipotle bourbon butter grilled oysters, **Hog Island Oyster Co.** (California, US)





FRUITY

Contributing sweet, sour, bitter and floral notes, fruit is a great way to bring balance and complexity to a dish in the simplest terms.

Coils of bonito pair with the citrus rasp of cape gooseberry – or physalis as it's otherwise known – along with some lemon oil. Blackcurrant vinegar is a stark dressing that balances sea bass crudo and the nutty, ferrous notes of sea aster. Umami-imbued snapper cured with kombu is met with the tempered, caramel acidity of wood-roasted pineapple and striped bass is again served as crudo, with the sweetly-soured notes of nectarine.



Anti-clockwise from top left:
Bonito with cape gooseberry, nasturtium flower jelly, shiso and lemon oil, **@huntfishgrowcook** (Instagram, Australia) || Wild seabass crudo, blackcurrant vinegar & sea aster, **Crispin E1** (London, UK) || Kombu cured snapper wood roasted pineapple, cabbage & tostadas, **Mason** (Bali, Indonesia) || Striped bass crudo with nectarine, white shoyu & bronze fennel, **Fair Haven Oyster Co.** (Connecticut, US)

CORN

Naturally sweet yet savoury, creamy yet able to provide a toothsome 'pop', corn is an ideal match for a range of fish.

Cured salmon served with classic accompaniments of beetroot and orange is taken to the next level with creamy corn panna cotta. Conversely, literal creamed corn egg drop sauce makes a comforting contrasting base on which to serve a crispy fillet of fish. Hardy kingfish can be roasted tandoori-style and laden with a sweetcorn salsa, wrapped in a pillowy garlic naan, whilst fried zander goes with grilled corn along with a sauce made from sea urchin and bones, accented with pickled chanterelles.



Clockwise from top right:
Cured salmon, corn panna cotta, beetroot, orange, dill & radish, **@chefron.kitchen** (Instagram, US) || Crispy fish fillet with creamed corn egg drop, **Lucky Peach Diner** (Jakarta, Indonesia) || Tandoori kingfish, sweetcorn salsa & garlic butter naan, **@ksnice_n_spice** (Instagram, UK) || Fried Zander with grilled corn & pickled chanterelles, finished with a sauce made from fish bones and sea urchin, **The Pescatarian** (Copenhagen, Denmark)



THOUGHT STARTERS

Compressed to Impress – Buying vacuum-packed seafood is nothing new, so take it one gastronomic step further. Professional kitchens will vacuum-pack to intensify and infuse flavour so why not package scallops in an elderflower syrup with gooseberries for a premium home experience?

Hot Honey 2.0 – The buzz surrounding hot honey shows little sign of stopping, so there's ample scope to play with this swicy phenomenon. Think honey with birdseye chilli, fish sauce, garlic and ginger for Thai-style prawns finished with lime juice or a new, sugar-free take on Nước chấm.



CUISINES

Fish and seafood form a significant part of diets the world over and, in an increasingly interconnected world, drawing inspiration from from other cultures has never been easier.

Marco Pierre White said, “We live in a world of refinement, not reinvention”, which is true when looking at food through the lens of a classicist. To this end, the continued resurgence of French classical techniques sees prawn poached in butter and monkfish en papillote.

But it also sees a classic bouillabaisse reinvented into croquettes and taking on the flavours of coconut milk, saffron, lemongrass and chilli. Likewise, the classic cannoli has a savoury overhaul with seasoned ricotta, trout roe & dill. The classic pairing of garlic and mussels is revamped with the increasingly popular Middle Eastern condiment, toum and also taken to Thailand with a satay twist.



CUISINES

FRENCH CLASSICS

ITALIAN

MIDDLE EASTERN

INDIAN

THAI

KOREAN

CHINESE



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:



FRENCH CLASSICS

The foundation of modern European cookery that has since spanned across the world, classic French cookery is having a moment whilst simultaneously having never really gone away.

Prawns poached in butter keep things luxurious and moist, with a modern, swalty twist of maple with Prosciutto that riffs on surf & turf. Similarly, the classic bouillabaisse takes on the flavours of South East Asia with lemongrass and coconut milk, whilst elsewhere, it's turned into crispy croquettes. Cooking fish in paper, otherwise known as 'en papillote' is brought back into modernity, served with a punchy Puttanesca.



Clockwise from top right:
Couscous, butter-poached prawns, maple syrup glazed Prosciutto,

@chefthyagorocha

(Instagram, Australia) ||
Bouillabaisse croquette with toast, **Rosie** (Utrecht, Netherlands) || Monkfish en papillote with Puttanesca sauce, **@matthewryle**

(Instagram, UK) ||
Bouillabaisse with lemongrass, coconut milk, chilli and saffron, **Passerine** (Pennsylvania, US)





ITALIAN

Like many countries that enjoy a healthy dose of sunshine and a sea breeze, high-quality ingredients typically follow, to which Italy is no stranger, often making for brilliant fish and seafood dishes.

A salad of Calabrian tuna, heirloom tomatoes and Borlotti beans strewn with onion and the 'pop' of capers. A hard-seared butterflied mackerel can be furnished with a pert peperonata. Grilled oysters are effectively seasoned when obscured with a layer of Pecorino cream. Savoury cannoli filled with seasoned ricotta is bookended with trout roe and flecked with dill.



Anti-clockwise from top left:
Calabrian tuna, heirloom tomatoes, Borlotti beans, capers & onion, **Bottega Caruso** (Kent, UK) || Mackerel, peperonata, pink fir potatoes and confit garlic yoghurt, **Marmo** (Bristol, UK) || Grilled Maine oysters, Pecorino cream and Sarawak peppercorn, **L'Ardente** (Washington, US) || Savory cannoli with seasoned ricotta, trout roe & dill powder, **Flour + Water** (California, US)

MIDDLE EASTERN

The vibrancy of the Middle Eastern culinary repertoire tessellates phenomenally with a wide array of fish and seafood.

Prawns brushed thickly with harissa and grilled elevate a humble plate of couscous and charred preserved lemon. The garlicky thwack of toun continues to trend, seen here with mussels and a discus of hash browns. Fat, auburn-seared scallops sink into a comforting bed of beans infused with saffron. Slips of tuna crudo welcome the bright, bitter-sweet acidity of blood orange and pomegranate with the verdant bite of pistachios.



Clockwise from top right:
Grilled harissa prawns, **Spike** (Dubai, UAE) || Smoked mussels, toun & hash brown, **Nomad** (Sydney, Australia) || Saffron-infused beans topped with diver scallops, **@food52** (Instagram, US) || Tuna crudo with blood orange, pomegranate, pistachio & lovage, **Paski Vineria Popolare** (Sydney, Australia)

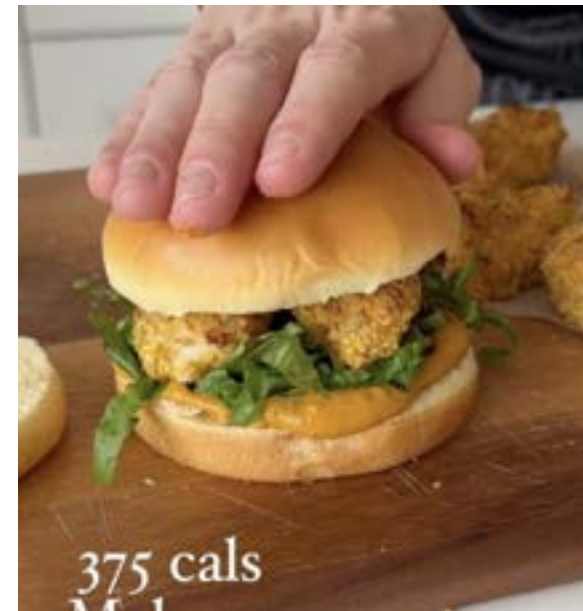




INDIAN

Elegant, bold and ethereal, the spices, along with the textures of Indian cuisine, make great bedfellows for fish and seafood.

A play on brandade sees a salt cod and potato puri adorned with chives, lemon, olive oil and bejewelled with caviar. A robust Goan coconut curry, rice and fiery tarka dhal stand up to hard-grilled whole sea bass. Shatteringly crisp prawn pakoras go beautifully with a vibrant coriander and yoghurt dip. The trend for air fryer recipes continue, with an inventive take on a fish finger sandwich using crushed Bombay mix as a coating, along with curry mayonnaise.



Anti-clockwise from top left:
Salt cod & potato puri with chive, lemon, olive oil & caviar, **Skosh** (York, UK) || Fiery Goan coconut curry, with grilled, spiced sea bass, tarka dhal & coconut rice, **@charlieboy_bbq** (Instagram, UK) || Prawn pakoras with coriander & yoghurt dip, **@sundaybrunchfood** (Instagram, UK) || Air fryer Bombay mix fish finger sandwich with curry mayonnaise, **@boredoflunch** (TikTok)

THAI

Renowned for flavours that can be full-throated yet nuanced as a whisper, Thailand is no stranger to incredible dishes of fish and seafood.

To this end, major chains such as Shake Shack have released a Thai green curry sandwich complete with Thai basil, mint and coriander, whereas the classic risotto is taken up a gear with Thai green curry flavours. Oysters served with green chilli mignonette are mellowed with coconut milk, whereas mussels can be doused with satay sauce.



Clockwise from top right: Thai green curry fish sandwich with Thai basil, mint, coriander & cucumber, **Shake Shack** (UK) || Thai green prawn risotto, @sainsburysmag (Instagram, UK) || Coffin Bay oyster, coconut milk, green chilli mignonette & apple, @savisquishles (Instagram, Australia) || Mussels stir-fried with Thai satay sauce and topped with Ajad, **Old Boy** (Brussels, Belgium)

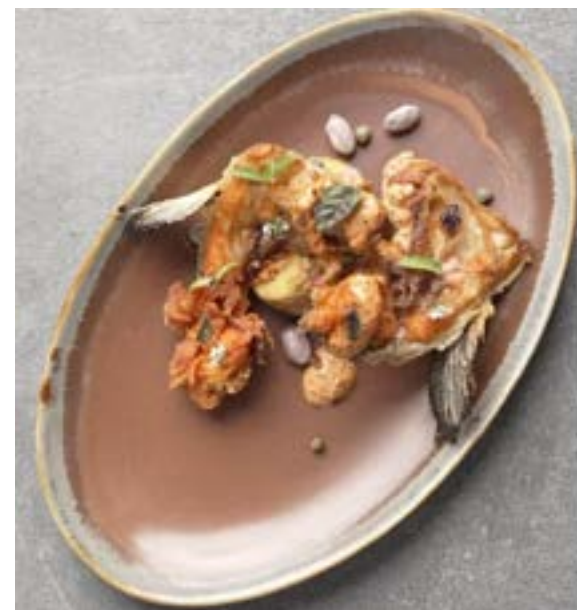




KOREAN

Synonymous with the funk of ferments, scorching spice and untold umami, Korea's culinary influence continues to proliferate.

Oysters topped with kimchi ice, bringing balance through temperature difference. King prawns cooked with the shell on gleam with gochujang butter, served with charred lime to keep things sweet and not overly sour. A fried salmon collar ensures nothing goes to waste, splodged with an umami-laden miso and gochugaru sauce. Meanwhile, seaweed snacks make a meal of things with a gochujang-infused riff on Korean BBQ.



Anti-clockwise from top left:
Oysters with kimchi ice, **Bokman** (Bristol, UK) || Gochujang Korean BBQ-flavoured seaweed snack, **Gimme Seaweed** (US) || Shell-on king prawns in gochujang butter with charred lime, **The Brown Cow** (London, UK) || Fried salmon collar with roasted fingerling potatoes and a salad of herbs, capers, & cranberry beans, gochugaru miso sauce and micro greens, **@chefstevenpdx** (Instagram, Netherlands)

CHINESE

Chinese cuisine has enjoyed a significant, long-standing trend with the explosion of crispy chilli oil, but now even more staples are being used to elevate humble fish and seafood.

Crispy king prawns are flecked with the numbing sweetness of Szechuan pepper, whilst others are infused with Hua Diao wine and Chinese angelica – known as female ginseng, used for centuries in traditional Chinese medicine. Prow fish is put through its paces, cooked siu yuk style, whilst humungous wraps take surf & turf to new depths with steak and tempura shrimp, surimi salad, bacon, chilli crunch, lo mein noodles and Szechuan aioli!



Clockwise from top right:
Crispy king prawns with Szechuan pepper, **Sanford and Sons Fishmonger** (Auckland, New Zealand) || Prawns infused with Hua Diao wine, Chinese angelica, & goji berries, **Taishike** (Singapore) || Prow fish cooked siu yuk style, **@uncle_lim_chiak** (Instagram, Singapore) || Wrap with steak, tempura shrimp, surimi salad, bacon, chilli crunch lo mein noodles, lettuce & Szechuan aioli, **Longboards Wraps & Bowls** (Missouri, US)

THOUGHT STARTERS

Toum – This tending Middle Eastern condiment could expand beyond a dip. Think monkfish cooked en papillote, smothered in toum or prawns basted in toum on the barbecue.

Som Tum – As Thai flavours trend, the technique of serving quality fish raw as crudo or cured with citrus could be transformed by deconstructing the iconic som tum salad.

Butter Poaching – Poaching shellfish in butter is, of course, a delicious way of keeping the flesh supple and full of flavour. But don't forget that you're also infusing the butter with deep shellfish flavour, offering a wealth of zero-waste possibilities. Lobster beurre blanc, why not?



SUMMARY

Much of fish and seafood is often characterised by bleak notions of food insecurity and, unfortunately, the very real possibility of extinction. Yet despite this, whilst the hand of man might be ham-fisted at times, it has also proven to be caring and agile when materialising solutions.

Although laboratories appear set to be brought increasingly into the fold for cultivated fish and exploiting the as-yet untapped potential of seaweed, consumer demand for ‘the real deal’ will exist parallel to this – even if it means spending that little bit more to get it. Similarly, as the jaws of increased living costs continue to press, getting creative and resourceful remains a key strategy in getting the most out of what we can afford, both at home and in restaurants.

The zero-waste movement excels here, using the bones, shells and heads of fish and seafood to maximise flavour, with inspiration coming through both a classical and modern, meaning we’re rarely in danger of creative fatigue. Fresh fish and seafood doused with quality fats such as good olive oil, compound butters or native breed fats become ever more en vogue.

This is made even more poignant as consumers still demand transparency in the food supply. But there’s still fun to be had with the prevailing trend of ‘snackification’ producing caviar sliders, riffs on the classic Gilda and crispy fish skins. Meanwhile, the fever for ferments persists with increased use of garums, and dry-ageing sees fish cut like steaks being treated akin to their beef counterparts. Fish & seafood is proving its diversity, without skimping on flavour.

