

# SEAFOOD TRENDS



DATAESSENTIAL

# DATASSSENTIAL

INNOVATE QUICKER. SELL SMARTER. GROW FASTER.

## Industry Insights

Library of presentation-ready intelligence

## Menu & Consumer Trends

Personalized and data-driven innovation and defense

## Chain Benchmarking

Competitive intelligence and monitoring

## Sales Intelligence

Sales prospecting and monitoring





Economic challenges aside, consumers overall still have a positive outlook heading into 2026.

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59%

OF CONSUMERS ARE FEELING OPTIMISTIC HEADING INTO 2026

# CONSUMER PRICE INDEX - FOOD

Month	Food Inflation	AH Inflation	AFH Inflation
Nov-24	2.38	1.57	3.65
Dec-24	2.51	1.77	3.62
Jan-25	2.50	1.93	3.38
Feb-25	2.61	1.90	3.68
Mar-25	2.96	2.42	3.79
Apr-25	2.76	2.01	3.89
May-25	2.88	2.23	3.85
Jun-25	2.97	2.38	3.83
Jul-25	2.87	2.16	3.91
Aug-25	3.19	2.68	3.93
Sep-25	3.11	2.69	3.73
Oct-25*	2.82	2.21	3.72
Nov-25	2.65	1.94	3.66

# ENTRÉE PRICE

Entrée	Menu Price	PCYA
Steak	\$ 17.59	+4%
Shellfish	\$ 17.50	+3%
Fish	\$ 16.95	+5%
Beef	\$ 15.00	+2%
Chicken	\$ 14.50	+4%
Pork	\$ 14.50	+4%
Burger	\$ 13.99	+4%



A man with short dark hair and a beard, wearing a blue button-down shirt, is looking down at a table in a restaurant. He is wearing a white watch on his left wrist. The background shows a blurred restaurant interior with warm lighting.

66%

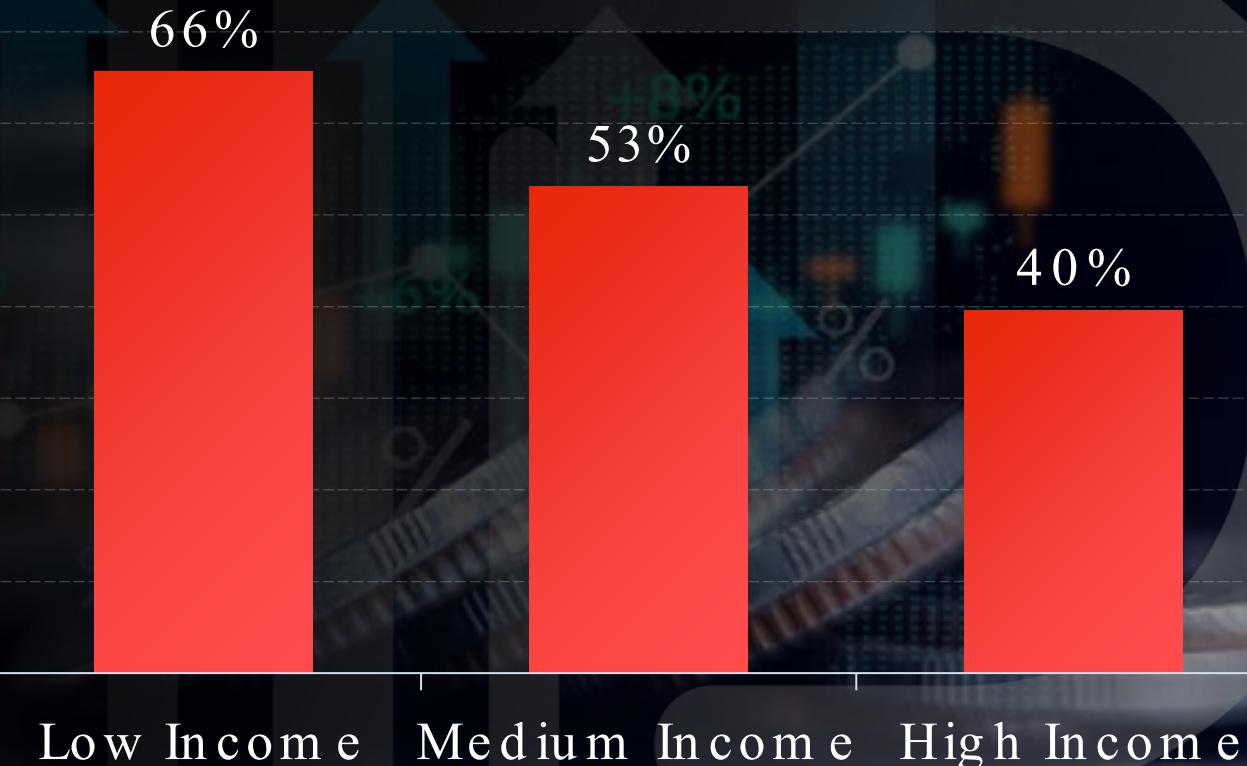
of operators agree with the statement:  
**“we’ve had to raise prices, but we try to balance that by improving the overall experience.”**

# 53%

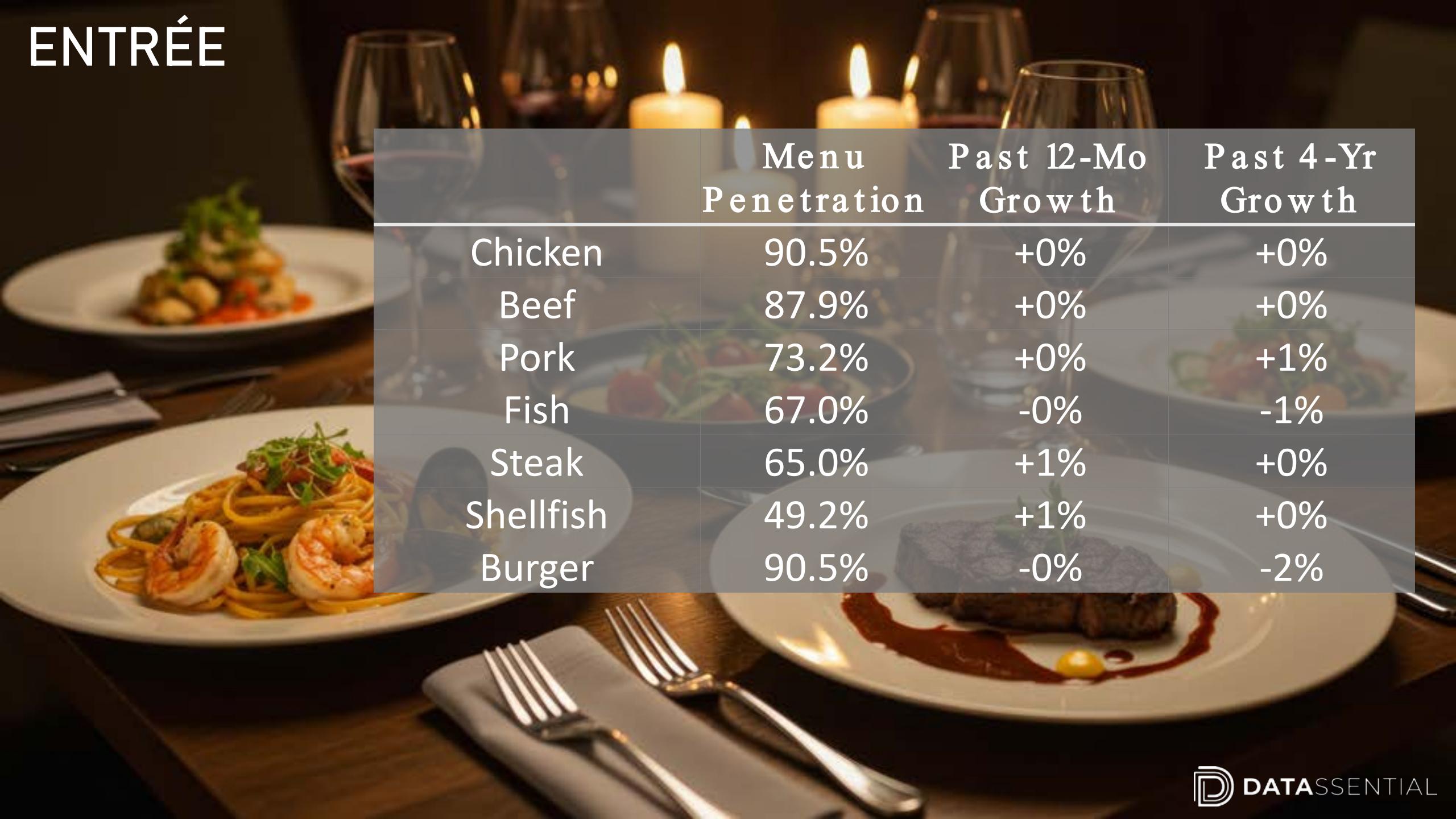
OF CONSUMERS AGREE

**“I can’t afford for prices to go up any more — I’m already stretched to my limit.”**

## DEMOGRAPHIC DIFFERENCES

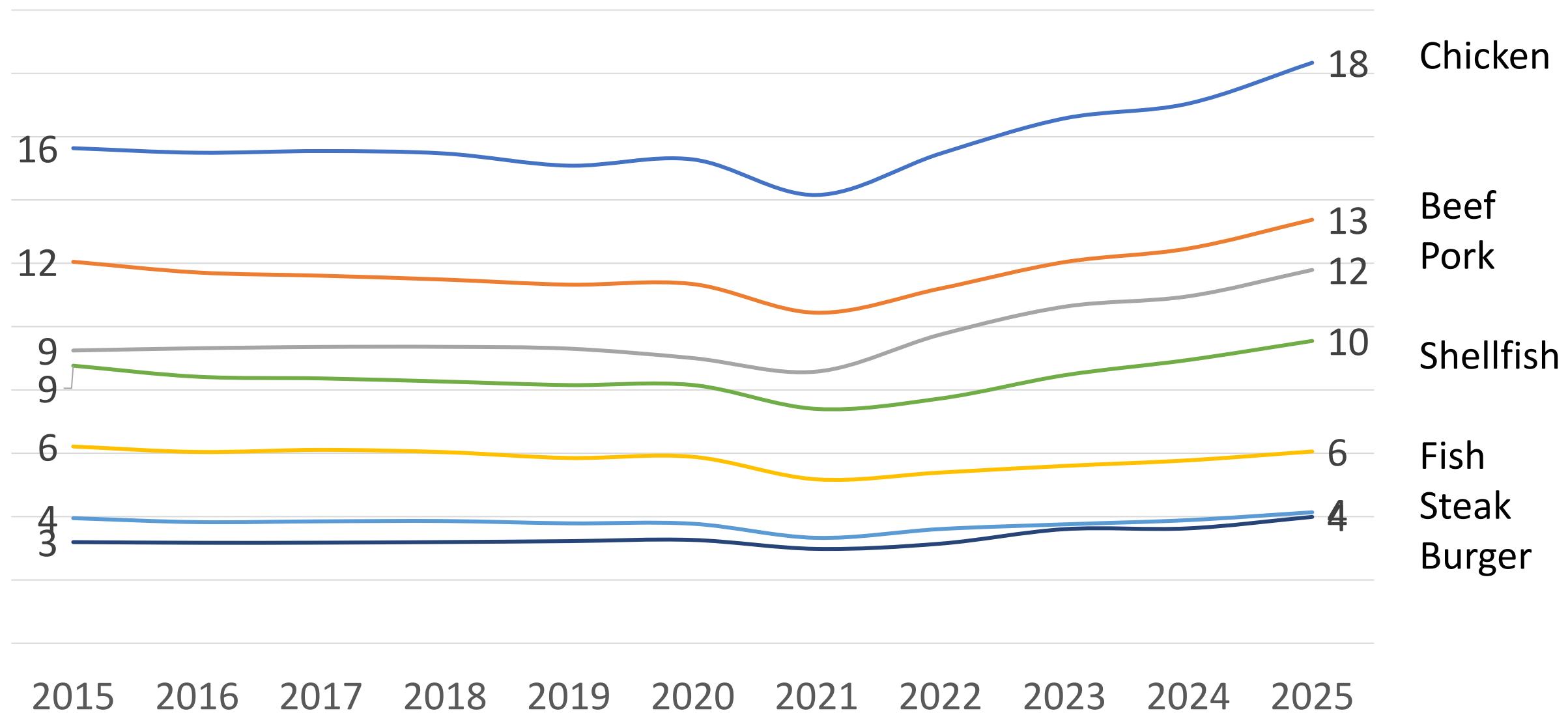


# ENTRÉE

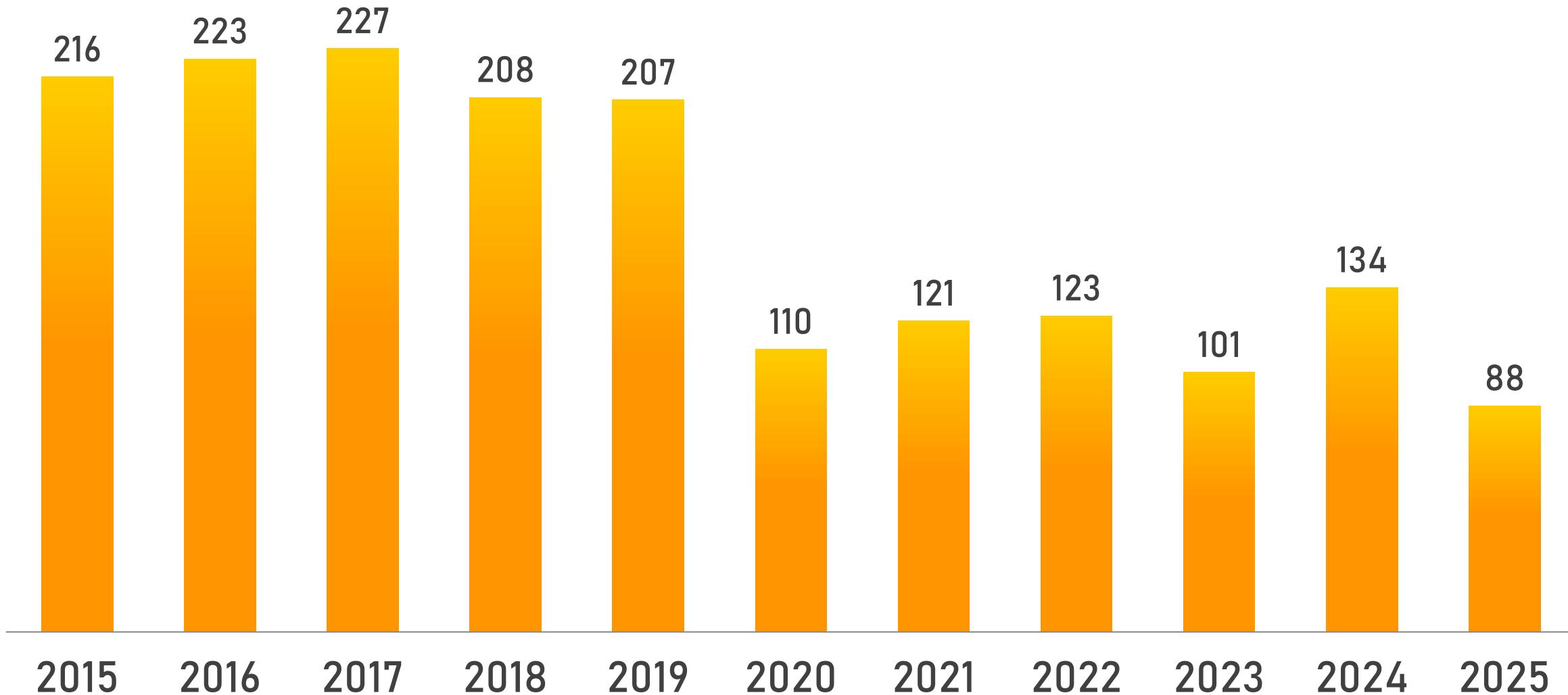


	Menu Penetration	Past 12-Mo Growth	Past 4-Yr Growth
Chicken	90.5%	+0%	+0%
Beef	87.9%	+0%	+0%
Pork	73.2%	+0%	+1%
Fish	67.0%	-0%	-1%
Steak	65.0%	+1%	+0%
Shellfish	49.2%	+1%	+0%
Burger	90.5%	-0%	-2%

# ENTRÉE # OF ITEMS ON MENU



# SEAFOOD ENTRÉE LT0s



# SEAFOOD ENTRÉE LTOs

	2024	2025	Change
Shrimp	51	37	-14
Salmon	33	20	-13
Lobster	11	5	-6
Crab	14	9	-5
Tuna	4	0	-4
Fish	16	17	+1

# SEAFOOD ENTRÉE LTOs

	2024	2025	Change	PCYA
Shrimp	51	37	-14	-27%
Salmon	33	20	-13	-39%
Lobster	11	5	-6	-55%
Crab	14	9	-5	-36%
Tuna	4	0	-4	-100%
Fish	16	17	+1	6%



TO BE PROFITABLE IN 2026...

56%

of operators think it's  
more important to  
**attract new guests and  
win back lapsed  
customers.**

44%



of operators think it's  
more important to  
**satisfy and retain  
current customers.**

## MARINER'S SEAFOOD BOIL

A Maine lobster tail, a dozen shrimp, snow crab legs, corn, and red potatoes. Served in a hot shake-and-serve bag with your choice of flavor.



**RED LOBSTER**  
FRESH FISH • LIVE LOBSTER

\$49.99



DRAW	70%	★★★★★
UPI	60%	★★★★
VALUE	33%	★★★



**DATAESSENTIAL**

A blurred background image of a man and a woman sitting at a wooden table in a restaurant. On the table, there is a small brown piggy bank and some US dollar bills. The scene suggests a discussion about money and food choices.

72%

of consumers say they are becoming  
**more selective about where they  
spend their money on food in 2026.**



## Fish, Lobster Bites & Fries - \$5.99

One Batter Dipped Fish fillet and five Lobster Bites, served with your choice of classic side and hush puppies.

VALUE 75% ★★★★★

DRAW 58% ★★★★

UPI 63% ★★★★★



FOR JUST \$5.99  
 DATAESSENTIAL

VALUE	47%	★★★★
DRAW	66%	★★★★★
UPI	64%	★★★★★

## Captain's Seafood Platter \$14.99

Two pieces of Hand-Breaded Catfish, five Butterfly Shrimp, two Stuffed Crab Shells, and Popcorn Shrimp. Served with your choice of two classic sides and hush puppies.



# P.F. CHANG'S®

MISO GLAZED  
SALMON  
DINNER  
SPECIAL  
\$15.99



VALUE	50%	★★★★★
DRAW	57%	★★★★★
UPI	52%	★★★

## CAMPFIRE SHRIMP SKILLET - \$10.99

Grilled shrimp and andouille sausage with campfire seasoned sweet corn on the cob and red skin potatoes cooked in a tasty buttery broth and sealed in foil to lock in the flavor.



VALUE	70%	★★★★★
DRAW	66%	★★★★★
UPI	67%	★★★★★

# VALUE - BY THE NUMBERS - UNDER \$5

Mar 2025 \$3.59

Checkers And Rally's

**CRISPY FISH SANDWICH**



Our crispy fish filet topped with iceberg lettuce and tartar sauce for a boatload of flavor between toasted sesame seed buns.

⌚ Returning Item

Mar 2025 \$3.99

Burger King

**FIERY BIG FISH SANDWICH**



White Alaskan Pollock with crispy panko breading coated with our triple pepper spicy glaze and topped with sweet tartar sauce, lettuce and crunchy pickles on a toasted potato bun.

⌚ Returning Item

Mar 2025 \$4.19

Wendy's

**CRISPY PANKO FISH SANDWICH**



Features a wild-caught Alaskan pollock fillet with crispy-fried panko breading, served with dill tartar sauce, crinkle-cut pickles, lettuce, and American cheese on a toasted premium bun.

⌚ Returning Item

VALUE: 72%



VALUE: 71%



VALUE: 63%



# VALUE - BY THE NUMBERS - \$5.00

Jan 2025 \$5.59

Arby's

**KING'S HAWAIIAN FISH DELUXE SANDWICH**



A crispy fish fillet with cheddar cheese, shredded lettuce, tomato and tartar sauce on a toasted King's Hawaiian roll.

⌚ Returning Item

Mar 2025 \$5.99

Popeyes

**FLOUNDER FISH SANDWICH**



Alaska Flounder filet marinated in our Louisiana herbs and crispy coating, fried to golden brown perfection atop a toasted buttery brioche bun with barrel cured pickles in between.

⌚ Returning Item

Aug 2025 \$5.99

Captain D's

**GIANT FISH SANDWICH & FRIES**



Two Batter Dipped Fish fillets on a toasty bun with tangy tartar sauce and shredded lettuce, served with fries.

⌚ Limited Time Offer

VALUE: 57%



VALUE: 58%



VALUE: 69%



# VALUE - BY THE NUMBERS

Feb 2025 \$6.29

Dairy Queen  
**WILD ALASKAN PACIFIC COD SANDWICH**



Breaded and fried Pacific cod, lettuce, and tartare sauce on a bun.

Limited Time Offer

VALUE: 42%



Mar 2025 \$7.99

Culver's

**NORTHWOODS WALLEYE SANDWICH**



Features a battered and deep-fried Northwoods Walleye filet served with the chain's special tartar sauce and shredded lettuce on a lightly buttered, toasted hoagie roll.

Returning Item

Limited Time Offer

Mar 2025 \$8.38

Jack's Family Restaurants  
**BIG & CRISPY FISH SANDWICH**



Get hooked on our Big & Crispy Fish Sandwich with lettuce, pickles, and tartar sauce on a fresh bun.

New Item

Limited Time Offer

VALUE: 48%



# VALUE - BY THE NUMBERS - Over \$9.00

Feb 2025

**\$10.39**

## Freddy's Frozen Custard & Steakburgers

## CRISPY FISH DELUXE SANDWICH

✓ Limited Time Only!



Made with succulent and flakey flounder, lettuce, pickles, melted American cheese and topped with our tartar sauce.

## ⌚ Limited Time Offer

VALUE: 31%



# 64%

OF CONSUMERS ARE  
LOOKING FORWARD TO  
NEW FOOD & BEVERAGE  
TRENDS IN 2026



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# LONG JOHN SILVER'S®

Oct 2025 \$2.99  
**Long John Silver's BAJA CHICKEN WRAP**



Hand-battered chicken topped with coleslaw, our signature Crumblies®, brought together with our Baja sauce, wrapped in a soft tortilla.

Limited Time Offer

Oct 2025 \$2.99  
**Long John Silver's SWEET THAI CHILI CHICKEN WRAP**



Hand-battered chicken topped with coleslaw, our signature Crumblies®, brought together with sweet Thai chili sauce, wrapped in a soft tortilla.

Limited Time Offer

Aug 2025 \$6.00  
**Long John Silver's 2 PC CHICKEN BASKET**



Savor two pieces of crispy, all-white meat chicken — hand-battered in Long John Silver's signature batter and fried to perfection. They are perfectly paired with waffle fries and two hushpuppies.

Limited Time Offer

May 2025 \$6.00  
**Long John Silver's \$6 FISH AND CHICKEN BASKET**



One piece of our classic battered fish and one crunchy chicken tender, served with an individual side, and two hushpuppies.

Limited Time Offer

# WHY DON'T WE SEE MORE SEAFOOD WRAPS?

Jan 2022 \$7.99

[Tropical Smoothie Cafe](#)

**CAJUN SHRIMP WRAP**



Seasoned shrimp, dirty rice, Creole sauce, cheddar cheese, romaine lettuce, tomato and green onions in a toasted wrap.

 Returning Item 

Jun 2021 \$12.49

[Friendly's](#)

**WONTON SHRIMP WRAP**



Grilled shrimp, crispy applewood-smoked bacon, crunchy wontons, lettuce, and toasted sesame ginger dressing, all in a tomato wrap, and served with fries.

 Limited Time Offer 

Feb 2018 \$8.99

[Eat'n Park Restaurants](#)

**BUFFALO SHRIMP WRAP**



A returning favorite, this item includes crispy buffalo popcorn shrimp in a warm flour tortilla with lettuce, tomato, cheddar cheese and your choice of our homemade Ranch or bleu cheese dressing. We serve it with your choice of one side.

 Returning Item 

Aug 2025 \$6.00

Long John Silver's

## 6 PC SHRIMP BASKET



Revel in the crunchy delight of six shrimp, hand-battered in Long John Silver's signature batter and fried to perfection. This flavorful dish is paired with your choice of one individual side and two hushpuppies.

Limited Time Offer

Aug 2025 \$6.00

Long John Silver's

## 6 PC GRILLED SHRIMP BASKET



Indulge in a seafood delight with our grilled shrimp basket, featuring six succulent grilled shrimp served on a bed of rice.

Limited Time Offer

Feb 2025 \$6.00

Long John Silver's

## \$6 BATTERED SHRIMP BASKET



Six hand-battered shrimp with one side and two hushpuppies.

Returning Item

Feb 2025 \$6.00

Long John Silver's

## \$6 POPCORN SHRIMP BASKET



Dive into the deliciousness of popcorn shrimp, accompanied by your choice of one individual side and two hushpuppies.

Returning Item

Aug 2025 \$6.00

Long John Silver's  
6 PC SHRIMP BASKET



Revel in the crunchy delight of six shrimp, hand-battered in Long John Silver's signature batter and fried to perfection. This flavorful dish is paired with your choice of one individual side and two hushpuppies.

Limited Time Offer

Aug 2025  
Long John  
6 PC GR

Indulge in  
shrimp ba  
grilled shi

Feb 2025 \$6.00

Long John Silver's  
**\$6 COCONUT SHRIMP BASKET**



Six sweet, crispy coconut shrimp served with one individual side and two hushpuppies—bringing a tropical twist to classic seafood.

Limited Time Offer

\$6.00  
KET

Feb 2025 \$6.00  
Long John Silver's  
**\$6 POPCORN SHRIMP BASKET**

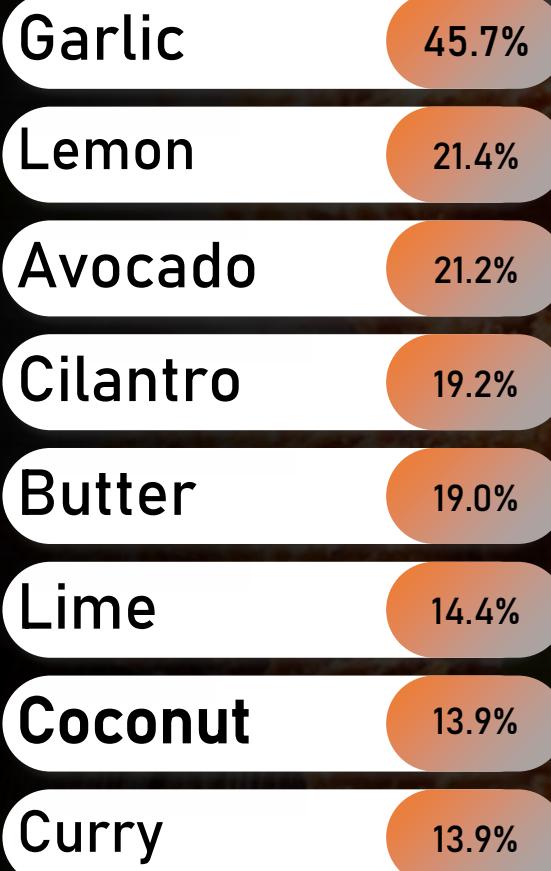


Dive into the deliciousness of popcorn shrimp, accompanied by your choice of one individual side and two hushpuppies.

Returning Item

# TOP FLAVORS

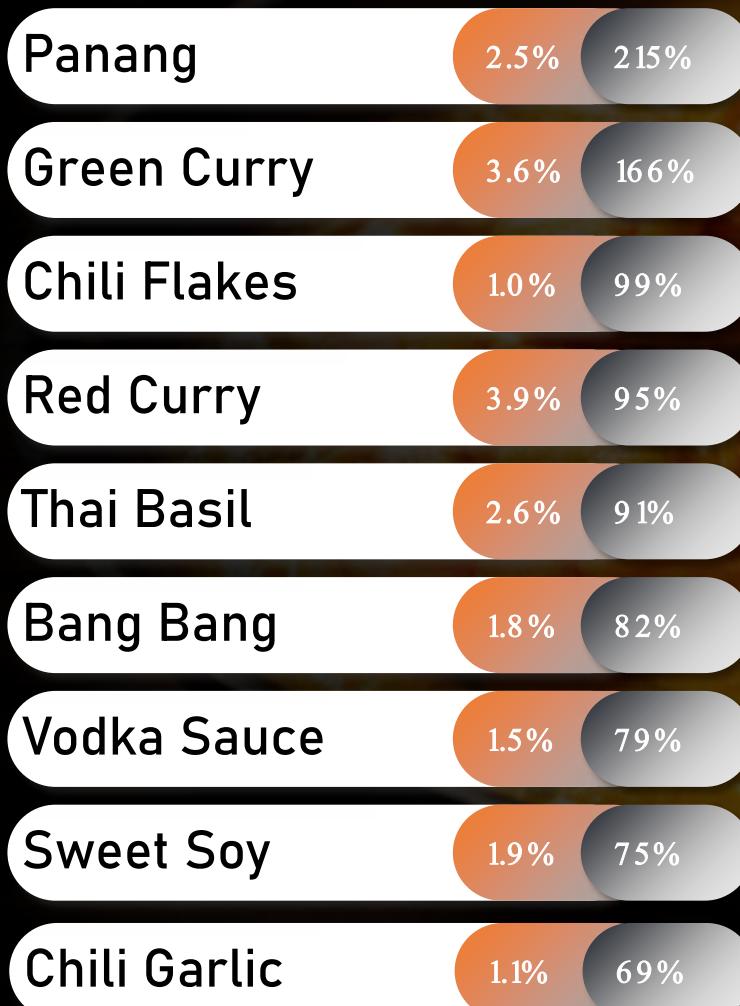
Within Shrimp Dishes



menu  
penetration

# TRENDING FLAVORS

Within Shrimp Dishes





# CHICKEN CHAINS +200 LOCATIONS

KFC  
Chick-fil-A  
Popeye's  
Zaxby's  
Raising Cane's  
Bojangles'  
Church's Chicken  
Champs Chicken  
Chicken Express  
Golden Chick  
Slim Chicken

SHRIMP

SHRIMP

SHRIMP

FISH

FISH

FISH



*Southern*  
**FRIED SHRIMP**  
with *Zaxtail* Sauce



Menu Penetration	Chain (250+)	Regional (3-249)	Independent (1-2)
Fish	34.5%	66.7%	79.4%
Shellfish	20.9%	55.4%	73.4%



To eat sushi on the go



SUSHI	Love/ Like It
Total US	45%
Gen Z	55%
Millennials	52%
Gen X	43%
Boomers	31%



SUSHI	Love/ Like It
Total US	77%
Gen Z	80%
Millennials	80%
Gen X	74%
Boomers	72%



# TOP 4 SEAFOOD RESTAURANTS (Based on Units)



529

517

483

166



68 Units



## Step 1

# Pick Your Favorite Catch!

\*Order By 1 or 2 Clusters!

Snow Crab Cluster | Dungeness Crab Cluster | Clams

\*Order By 1/2 Pound or Full Pound!

Crawfish | Black Mussels | New Zealand Mussels | Scallops | Shrimp (Head-on) | Shrimp (Head-off) | Blue Crab (Seasonal) | Lobster Tail |

Whole Lobster | King Crab Legs



## Step 2

# Pick Your Sauce!

Plain | Dry (Old bay only) | Original Cajun

| Garlic Butter | Seasoned Garlic Butter |

Lemon Pepper | Hook & Reel Special  
Blend



## Step 3

# Pick Your Spice Level!

Mild | Spicy | Fire



## Step 4

# Be Extra! Add All The Fixin's

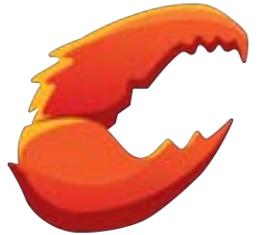
Potatoes (3) | Sausage | Corn on the cob

(3) | Hard-Boiled Eggs (2) | Broccoli |

Noodles | Ramen Noodle | Rice on the



**DATA**ESSENTIAL



CRAFTY CRAB  
SEAFOOD

66 Units

CRAFTY CRAB  
SEAFOOD





35 Units – Grew 9 Units

## MASON'S FAMOUS LOBSTER ROLLS



### CLASSIC LOBSTER ROLL

Served chilled with mayo and lemon butter



### CONNECTICUT ROLL

Served warm, tossed in butter



### LOBSTER SALAD ROLL

Served chilled tossed in celery, mayo & lemon dressing





# 35 Units – Grew 9 Units

## CLASSIC LOBSTER ROLL

Served chilled with mayo and lemon butter



## LOBSTER BLT ROLL

Lobster, bacon, lettuce, tomato

## CONNECTICUT ROLL

Served warm, tossed in butter



## SHRIMP ROLL

Jumbo shrimp tossed in mayo, celery & lemon

## LOBSTER SALAD ROLL

Served chilled tossed in celery, mayo & lemon dressing



## THE BAR HARBOR

Your choice of lobster roll with 50% more lobster meat, including lobster tail

# The KICKIN' CRAB

29 Units  
+6 Units



Pike Place  
**CHOWDER**



# Pike Place CHOWDER



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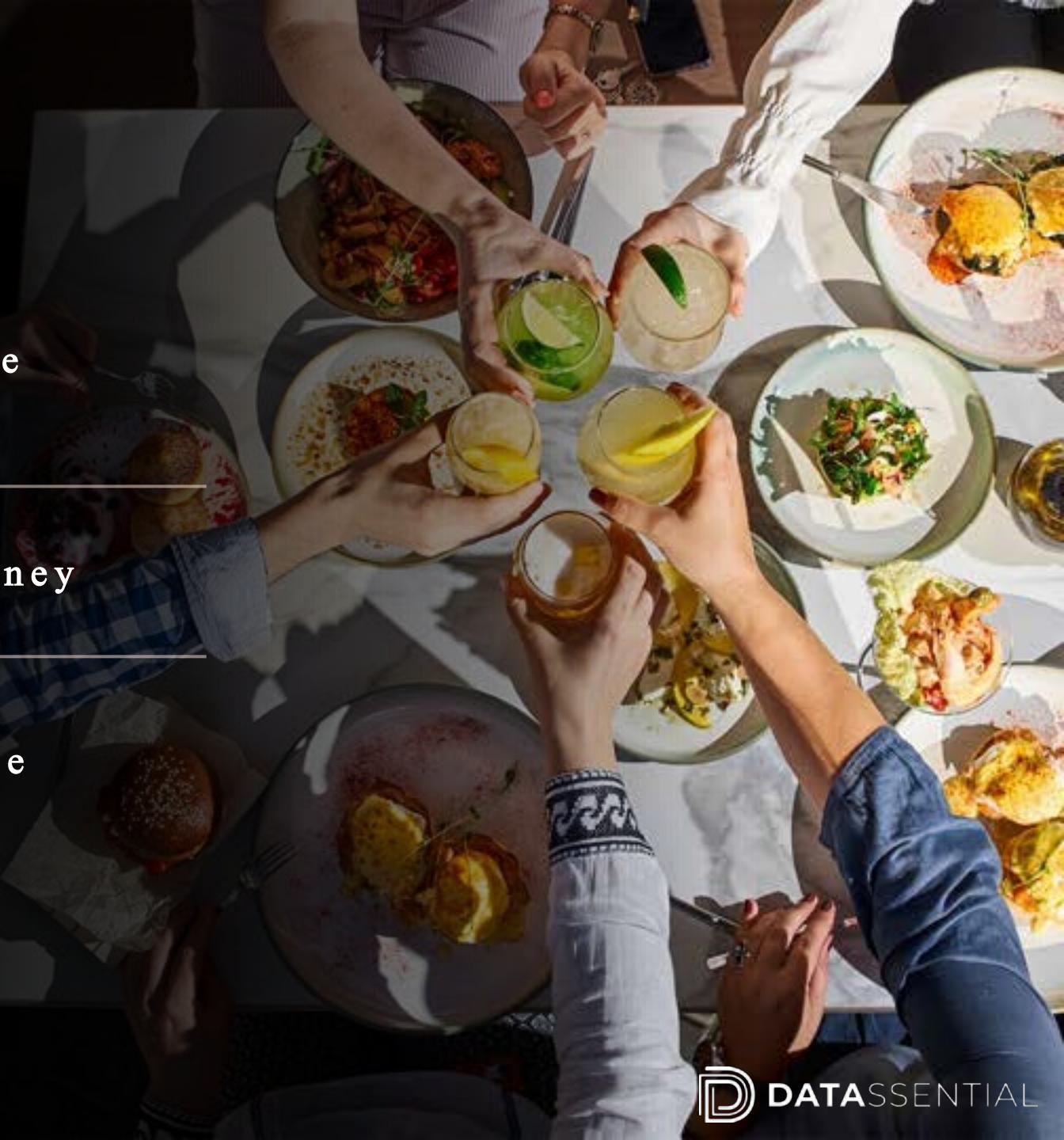
CONSUMER PERSPECTIVE

## What Is The Most Important Aspect Of Dining Out?

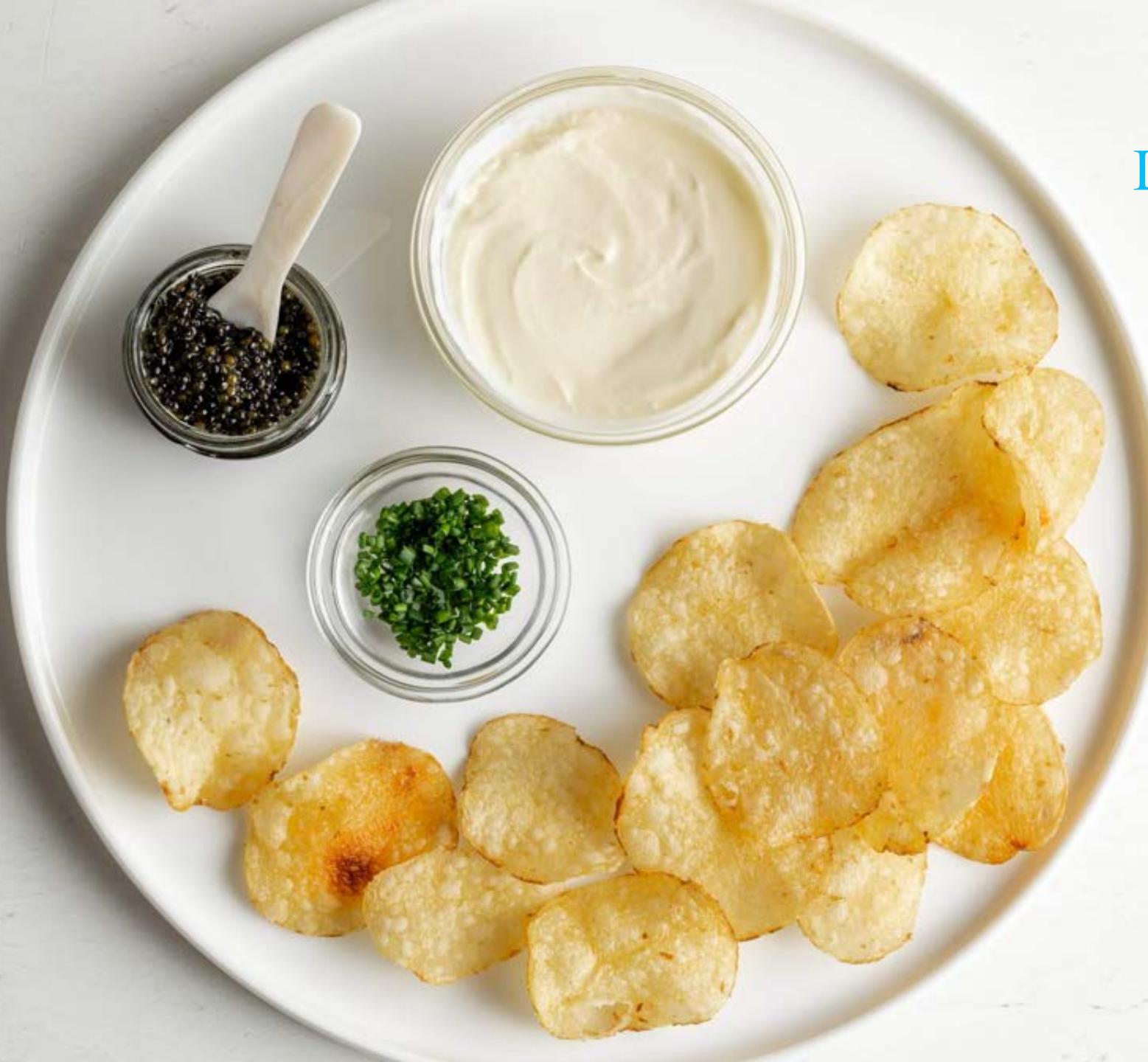
**59%** it is most important to enjoy the experience

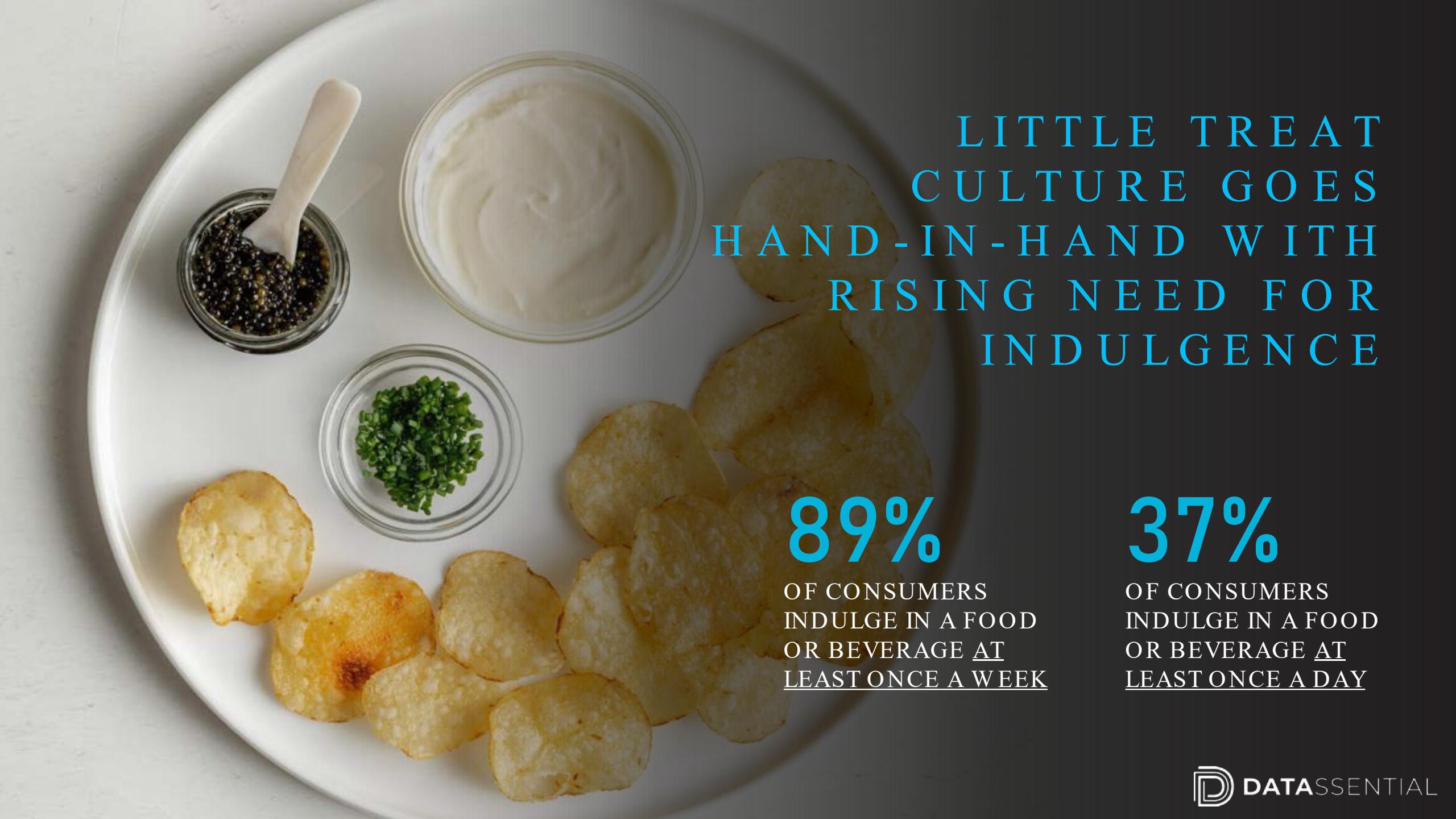
**32%** it is most important to save money

**9%** it is most important to save time



LITTLE TREAT  
CULTURE





LITTLE TREAT  
CULTURE GOES  
HAND-IN-HAND WITH  
RISING NEED FOR  
INDULGENCE

**89%**

OF CONSUMERS  
INDULGE IN A FOOD  
OR BEVERAGE AT  
LEAST ONCE A WEEK

**37%**

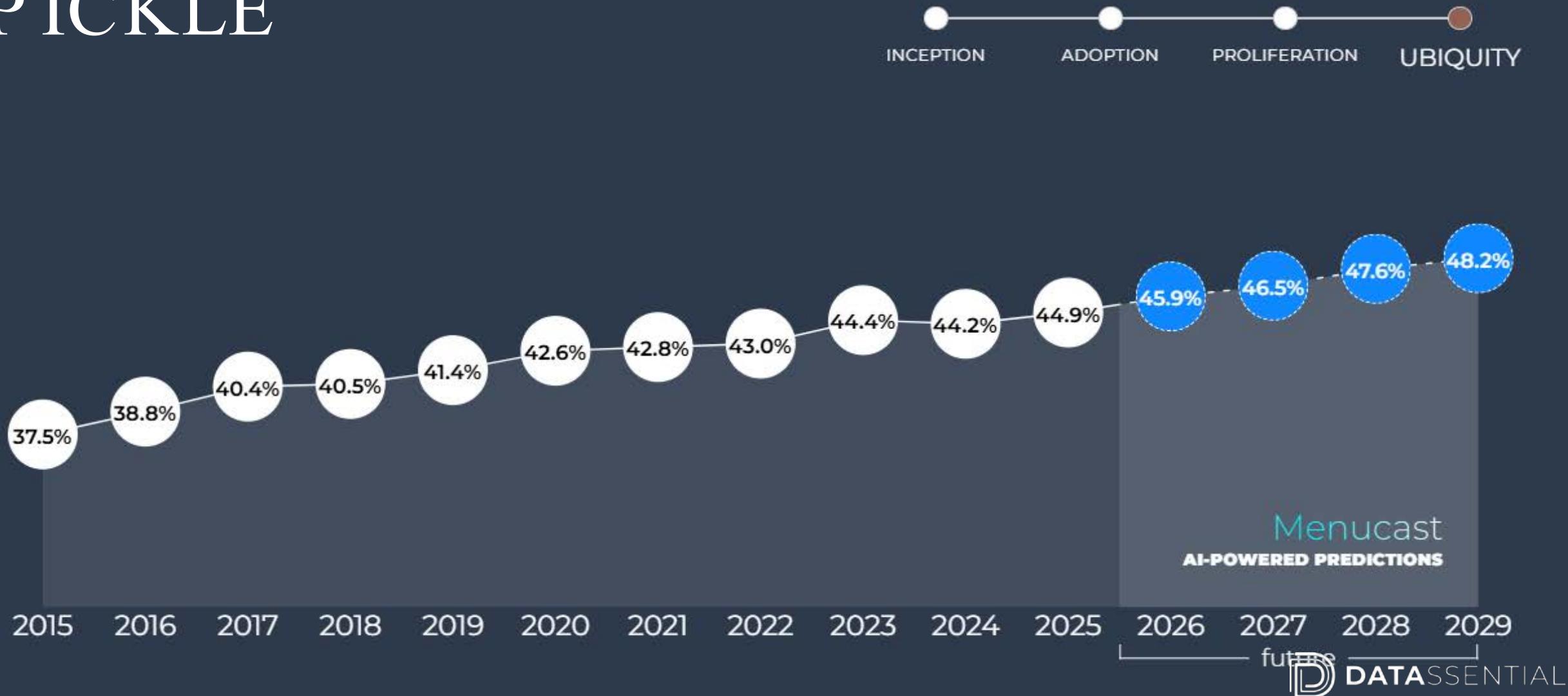
OF CONSUMERS  
INDULGE IN A FOOD  
OR BEVERAGE AT  
LEAST ONCE A DAY



39%

of consumers are **aware of the term “little treat culture,”** particularly Gen Z (63%) and Millennials (53%).

# PICKLE



# PICKLE LTOs

<p>Jul 2025 \$1.99 Del Taco <b>FRIED PICKLE TACO</b></p>  <p><b>NEW! FRIED PICKLE TACO</b> LIMITED TIME ONLY!</p> <p>Crispy breaded dill pickle spear, fresh house-grated cheddar cheese, creamy ranch sauce, crisp shredded lettuce, and fresh diced tomatoes in a warm flour tortilla.</p> <p><span>⌚ Limited Time Offer</span> <span>📍</span></p> <p>Unbranded PI: 30% ★ Branded PI: 40% ★ Uniqueness: 68% ★★★★★★ Frequency: 19% ★★★★ Draw: 57% ★★★★★★ Value: 58% ★★★★★</p> <p><b>SCORE 48</b> specialty appeal</p>	<p>Dec 2025 \$4.49 McDonald's <b>DILL PICKLE MCSHAKER™ FRIES</b></p>  <p>The Grinch is at it again, devising a mischievous plot. He wanted to change World Famous Fries® for the worse, or at least that's what he thought. All it would take is a sprinkle of Grinch Salt dill pickle seasoning. New Dill Pickle McShaker Fries are a plan with, at best, flawed reasoning.</p> <p><span>⌚ Limited Time Offer</span> <span>📍</span></p> <p>Unbranded PI: 45% ★★ Branded PI: 47% ★★★★ Uniqueness: 67% ★★★★★★ Frequency: 21% ★★★★ Draw: 50% ★★★★ Value: 34% ★★★</p> <p><b>SCORE 59</b> specialty appeal</p>	<p>Apr 2025 \$3.99 Popeyes <b>CHILLED PICKLE LEMONADE</b></p>  <p>Our Popeyes Pickle Lemonade is a blend of premium lemonade and pickle juice, creating a unique, yet balanced and refreshing flavor experience.</p> <p><span>⌚ Limited Time Offer</span> <span>📍</span></p> <p>Unbranded PI: 29% ★ Branded PI: 30% ★ Uniqueness: 67% ★★★★★★ Frequency: 18% ★★★★ Draw: 48% ★★★★ Value: 36% ★★★</p> <p><b>SCORE 38</b> consider</p>	<p>Oct 2025 \$7.39 Jimmy John's <b>PICKLEWICH</b></p>  <p>Original sandwich fillings stacked between thick-cut pickle slices instead of bread for a fresh, zesty bite.</p> <p><span>⌚ Limited Time Offer</span> <span>📍</span></p> <p>Unbranded PI: 29% ★ Branded PI: 33% ★ Uniqueness: 65% ★★★★★★ Frequency: 12% ★★★★ Draw: 49% ★★★★ Value: 28% ★★★</p> <p><b>SCORE 18</b> low potential</p>	<p>Mar 2025 \$12.99 Wawa <b>DILL PICKLE RANCH PIZZA</b></p>  <p>White Pizza with Dill Pickle Ranch, Dill Pickle Crisps, and Dill Pickles.</p> <p><span>⌚ Limited Time Offer</span> <span>📍</span></p> <p>Unbranded PI: 30% ★ Branded PI: 36% ★ Uniqueness: 65% ★★★★★★ Frequency: 20% ★★★★ Draw: 52% ★★★★ Value: 27% ★★★</p> <p><b>SCORE 32</b> consider</p>
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Seafood LTOs have stalled

Consumers are being cautious on how they spend their food dollars

but that does not mean seafood can't be a value item

Opportunities for Seafood at Chicken Chains. What else? Mexican?

Seafood is a great fit for Little Treat Culture





# Thank You



Don't Miss Our 2026 State of the Menu

Discover standout menu items, emerging trends, and rising foods, flavors, and ingredients for the year ahead. This webinar is part of a monthly series and is the best dialogue in food and beverage. Save your seat today!

[DATASSENTIAL.COM/GSMC2026](https://www.datasential.com/gsmc2026)