

The NFI Sushi Council

The Sustainable Seafood Summit

October 2, 2025

Osaka, Japan



NATIONAL
FISHERIES
INSTITUTE



Michael McNicholas



President
Oddisea SuperFrozen LLC



Chairman
NFI Sushi Council



Our Vision

- Steward a fully responsible, highly safety focused global sushi supply chain
安全性を最優先に、責任あるグローバルな寿司サプライチェーンを管理する
- Build consumer trust
消費者の信頼を築く
- Create a thriving market for sushi products
寿司製品の活気ある市場を創出する
- Encourage more people to eat more seafood across the world
世界中の人々に、より多くの魚介類を食べるよう促す



This is a pre-competitive stakeholder group that enhances the integrity of sushi products and promotes industry-led food safety.

これは寿司製品の高潔な誠実さを高め、業界主導の食品安全を推進する、業界における競争や利害関係を念頭におかない業界関係者グループです。





Our Mission

- Become the global voice of safety and integrity for the sushi industry
寿司業界における安全と誠実さのグローバルな代弁者となる
- Encouraging the adoption of safety standards
安全基準の採用を促進する
- Promote best practices to grow consumer passion for sushi
寿司に対する消費者の情熱を高めるための最良の方法を推進する

Conveyor Belt of Revolving Sushi Topics

回転寿司のコンベアーベルトの議題



Sushi responsibly: 寿司に対する責任:

- Food Safety 食品安全
- Product integrity 製品の完全性
- Correct labeling 正しい表示



Category leadership: 部類におけるリーダーシップ:

- Sushi and Sashimi-grade standard
寿司用および刺身用の基準
- Central resource for sourcing and
supply chain management
調達およびサプライチェーン
管理の中核リソース



Continuing Growth: 持続的な成長:

- Product innovation 製品革新
- Managing price point 価格帯の管理
- Expanding raw category
原材料部門の拡大



Mixed Performance in Seafood in Last 4 Years

まちまちな過去4年間の魚介類の業績



Sushi continues to grow

成長し続ける寿司

Stable price with larger assortment increased dollars and volume

品揃えの拡充による安定した価格設定が売上高と販売数量を増加させた





Dinner
Made Easy

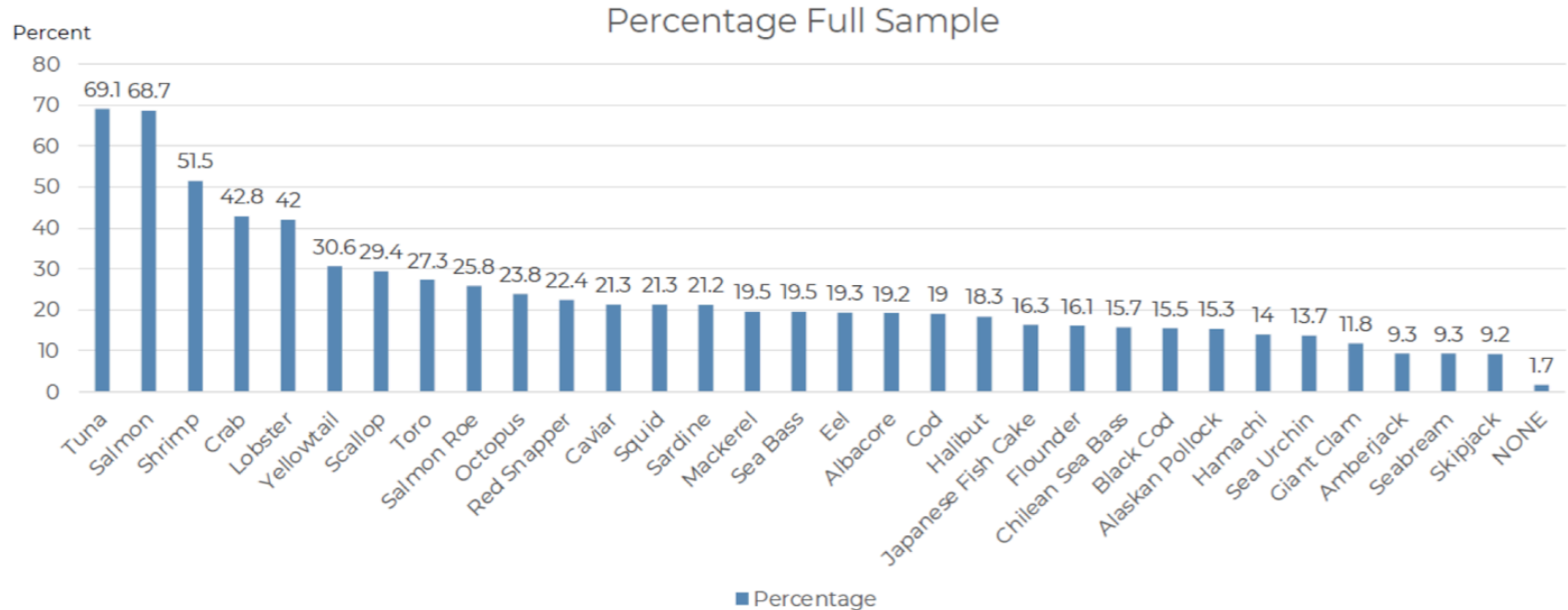
ZENSU
SUSHI & ROLLERY



Seafood/Fish Consumed in a Sushi Restaurant

Which of the following seafood/fish do you enjoy eating in a Sushi Restaurant, either in a Sushi roll (Maki), as Nigiri (sliced fish on top of rice), or as Sashimi (pieces of sliced fish)? (select all that apply).

寿司店で以下の魚介類・魚を、巻き寿司（巻き）、握り寿司（握り）、または刺身（切り身）のいずれかの形で食べるのが好きですか？（該当するものすべてを選択してください）。



Convenience continues to win across the store

店全体で引き続き勝っている利便性

Deli Prepared Meat
デリカデッセンの加工肉



+10.8%

Deli
Prepared
Dept.加工肉
部門
+5.5%

Ground Beef
牛ひき肉



+9.6%

All Other Beef Cuts
その他の加工カッ
ト牛肉
+9.5%

Convenience Bacon still figuring it out
ベーコンの利便性はまだ試行錯誤中



+3.2%

Raw Pork Bacon
生脛ベーコン
+4.6%

Rotisserie Chicken
ローストチキン



+11.8%

Chicken
Whole Bird
丸鶏
-0.2%

Deli Sushi
デリカデッセンの寿司



+3.5%

Seafood
Dept.シー
フード部門
-2.6%

Boneless Chicken Thighs
骨なし鶏もも肉



+10.4%

Bone-in Chicken
Thighs
+3.5%

Marinated Pork Loin
豚ロースのマリネ



+0.5%

No Prep
Pork Loin
+0.4%

Grab & Go Lunchmeat
手軽に持ち帰れるランチミート



-1.9%

Deli Service
Lunchmeat
-9.4%

EBT
Eligible

ZENSHI
MADE FRESH DAILY

***CONSUMER ADVISORY**
ITEM CONTAINING RAW SEAFOOD. CONSUMING RAW OR UNDERCOOKED SEAFOOD MAY INCREASE YOUR RISK OF FOODBORNE ILLNESS, ESPECIALLY IF YOU HAVE CERTAIN MEDICAL CONDITIONS.

FOOD ALLERGENS
OUR PREPARED FOODS MAY HAVE COME IN CONTACT WITH ONE OR A COMBINATION OF THE FOLLOWING KNOWN ALLERGENS: EGGS, MILK, FISH, CRUSTACEAN SHELLFISH, PEANUTS, TREE NUTS, WHEAT, SOYBEANS, OR SESAME.

NUTRITION INFORMATION
2,000 CALORIES A DAY IS USED FOR GENERAL NUTRITION ADVICE, BUT CALORIE NEEDS VARY. ADDITIONAL NUTRITION INFORMATION AVAILABLE UPON REQUEST.



Sushi is a Big Driver of Prepared Foods Sales at Retail



The Top 10% of U.S. Prepared Foods Retailers Compared to the Total U.S. 米国加工食品小売業者の上位10%と全米小売業者の比較

535 vs. 332 items

have larger prepared foods
departments

より大きな調理済み食品売り場を設ける

35 vs. 19 items

sell a larger variety of sushi items

より多様な寿司メニューを提供

\$7.05 vs. \$5.88

more money earned
per prepared foods item

調理済み食品1品あたりの収益増加

Younger generations are seeking different flavors and foods 若い世代は様々な味や食べ物を探している

Top Cuisine Types Gen Z Wants Grocery Deli Prepared Foods to Carry More
Z世代はトップクラスの多種類調理済み食品を食料品店のデリカテッセンに求めている



Pizza / Italian

52%



"Street" Food / Food
Truck Type Items

44%



Japanese/Sushi

35%



Korean

29%



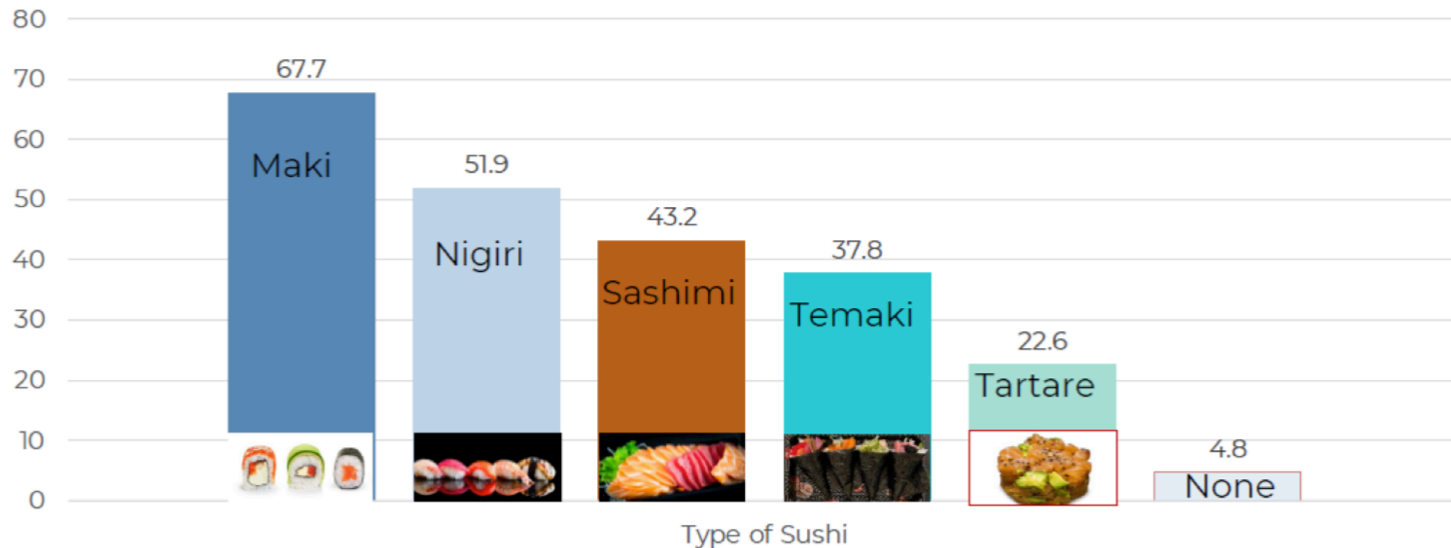
Cuban

22%



What Types of Sushi do you order? どんな寿司を注文しますか？

Which of the following types of sushi do you typically order when you go to a sushi restaurant?
寿司店に行った時、通常どの種類の寿司を注文しますか？

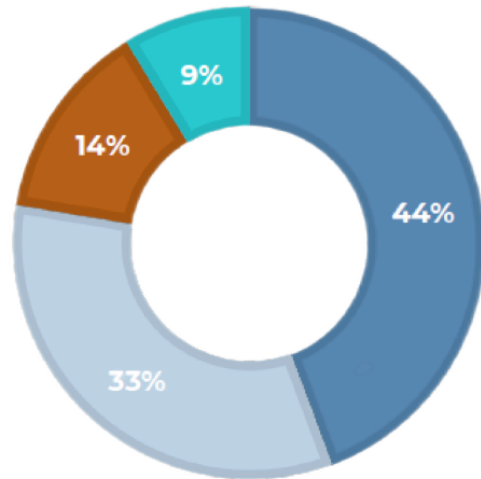
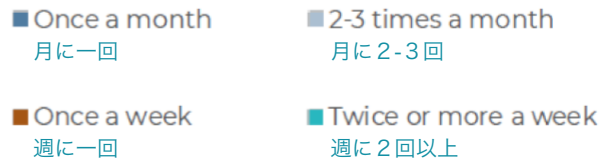


Frequency of Dining in a Sushi Restaurant

寿司店での食事頻度

- 1 time per month 月に1回 (44%)
- 2-3 times per month 月に2-3回 (33%)
- 1 time per week 週に1回 (14%)
- 2 or more times per week 週に2回以上 (9%)

Eat in a Sushi Restaurant 寿司店での食事



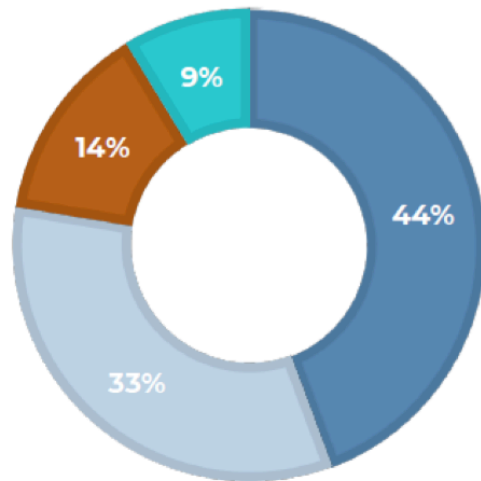
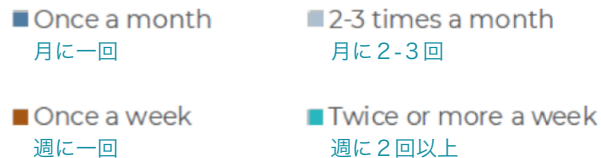
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Eat in a Sushi Restaurant

寿司店での食事



Frequency of Dining in an Upscale Sushi Restaurant

高級寿司店での食事の頻度

In the last 12 months, about how often did you dine in an upscale sushi restaurant?

過去12か月間、高級寿司店で食事をした頻度はどのくらいですか？

Never 皆無 (8%)

Less than 1 time per month 月一回以下 (23%)

1 time per month 月一回 (29%)

2 or more times per month 月二回以上 (24%)

1 time per week 週一回 (9%)

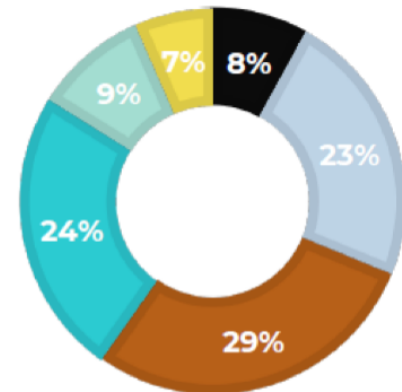
2 or more times per week 週二回以上 (7%)

An upscale sushi restaurant - uses only premium and fresh ingredients, including high-grade fish, top-quality rice and seaweed, and seasonal, exclusive, or rare ingredients not typically found in other sushi restaurants, all presented artistically.

高級寿司店 - 最高級で新鮮な食材のみを使用。高級魚、最高品質の米と海苔、季節限定・特選・希少食材など、他店では通常見られない素材を厳選し、芸術的な盛り付けで提供。

Frequency of Dining in an Upscale Sushi Restaurant

高級寿司店での食事の頻度





Frequency of Dining in a Casual Sushi Restaurant

In the last 12 months, about how often did you dine in an casual sushi restaurant?

過去12か月間、カジュアルな寿司店で食事をした頻度はどのくらいですか？

Never 皆無 (3%)

Less than 1 time per month 月に1回未満 (13%)

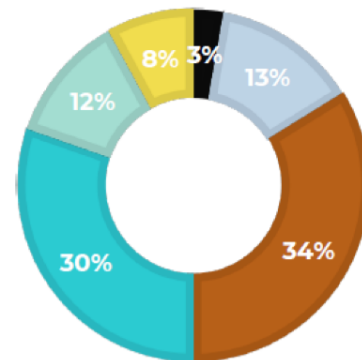
1 time per month 月に1回 (34%)

2 or more times per month 月に2回以上 (30%)

1 time per week 週に1回 (12%)

2 or more times per week 週に2回以上 (8%)

Frequency of Dining in a Casual Sushi Restaurant カジュアルな寿司店での食事頻度

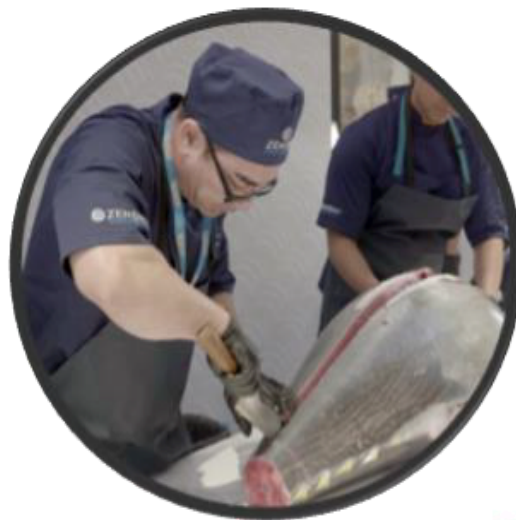


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高級寿司店 - 最高級で新鮮な食材のみを使用。高級魚、最高品質の米と海苔、季節限定・特選・希少食材など、他店では通常見られない素材を芸術的に盛り付ける。



Sushi Responsibly 責任ある寿司の提供



Join the NFI Sushi Council

NFI寿司評議会にご参加ください



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