

Here to give the UK seafood sector
the support it needs to thrive.



Prawns and Shrimp 2024

This factsheet intends to provide the United Kingdom (UK) seafood industry a summary of prawns and shrimp in the retail, foodservice and trade sectors.

21/02/2024 Suzi Pegg-Darlison (15-minute read)

Contents

Factsheet overview	3
Top takeaways	3
<i>UK trade and supply</i>	3
<i>UK retail</i>	3
<i>GB foodservice</i>	4
UK trade and supply	4
Landings	4
Imports	5
Exports.....	6
Latest Quarterly UK Seafood Trade Data	7
<i>Imported shrimp and prawn in decline</i>	7
UK retail sector	8
Prawns and shrimp in the UK retail market.....	8
Warm water prawns	9
<i>Warm water prawns' sales in retail</i>	9
<i>Warm water prawns' sales by sector</i>	9
<i>Warm water prawns' sales by segment</i>	9
<i>The warm water prawns' shopper (GB)</i>	10
Cold water prawns.....	11
<i>Cold water prawns' sales in retail</i>	11
<i>Cold water prawns' sales by sector</i>	11
<i>Cold water prawns' sales by segment</i>	12
<i>The cold water prawns' shopper (GB)</i>	12
Shrimps	13
<i>Shrimp sales in retail</i>	13
<i>Shrimp sales by sector</i>	13
<i>Shrimp sales by segment</i>	14
<i>The shrimp shopper (GB)</i>	14
GB Foodservice.....	15
Total performance and channel performance	15
Consumer demographics and motivations	16
Sources	18
**Trade data	19

Factsheet overview

Prawns and shrimp include shellfish species cold water prawns (CWP), warm water prawns (WWP) and shrimps. In the retail data these are distinguishable and will be included in this factsheet, however limitations in the trade, supply, and foodservice data means that prawns and shrimp for these sectors are presented as an overall product group.

Consumer preferences are constantly changing with several factors playing a role in purchasing decisions. Understanding this and having insights into the seafood market and its role in the retail, foodservice and trade sectors, can help to run a successful seafood business.

This factsheet intends to provide the United Kingdom (UK) seafood industry a summary of the consumption of prawns and shrimp in the retail, foodservice and trade sectors.

Top takeaways

Prawns and shrimp remain popular shellfish species in the UK purchased by consumers in and out of home. It is the fourth most imported species by volume and is 8% of all seafood servings in foodservice. In retail, warm water prawns are the sixth most popular seafood species by volume sales, cold water prawns are the tenth and shrimp is twenty-eighth.

UK trade and supply

The fourth most imported species by volume, 12.0% of all seafood imports are prawns and shrimp. In terms of volume, most imports were from Vietnam and most exports were to the Netherlands. Volume of imports and exports of prawns and shrimp has experienced year on year declines in 2023.

UK retail

Warm water and cold water prawns remain in the top ten selling species in the UK retail market with shrimps ranking twenty-eighth in terms of volume sales.

Warm Water Prawns

Worth £407.1m, warm water prawns are the sixth most purchased species in terms of volume, with 23,850 tonnes sold in UK retail. Of all seafood volume sales 6% are to warm water prawns. Both value and volume sales of warm water prawns are experiencing year on year declines (-0.1% and -7.5% respectively).

Cold Water Prawns

Worth £186.3m, cold water prawns are the tenth most purchased species in terms of volume, with 12,662 tonnes sold in UK retail. Of all seafood volume sales 3% are cold water prawns. Both value and volume sales of warm water prawns are experiencing year on year declines (-1.5% and -10.9% respectively).

Shrimps

Worth £9.0m, shrimps are the twenty-eighth most purchased species in terms of volume, with 569 tonnes sold in UK retail. Of all seafood volume sales 0.1% are to shrimps. Both value and volume sales of shrimp are experiencing year on year declines (-11.4% and -1.0% respectively).

GB foodservice

8% of all the seafood servings out of home are to prawns and shrimp. Overall, it was a weak year to September 2023 with servings down 6% on the previous year end. Enjoyed in six foodservice channels, prawns and shrimp are mostly purchased in Quick Service Restaurants.

UK trade and supply

The following sections provide details of prawns and shrimp imports and exports, comparing provisional HMRC data from 2023 to 2022.

Allocating trade statistics to a single species is not always possible, statistics presented in this report should be interpreted with caution. The extent of prawns and shrimp trade available can be found below in the trade data notes and limitations section.

Landings

In 2023 the total value of UK landings by UK vessels was £805.5million, an increase of +9.1% compared to 2022. 0.4% of this value came from prawns and shrimp. A total of £3.36 million of prawns and shrimp was landed in 2023, an increase of 84.8% compared to 2022. Brown shrimp was the main species landed to the UK by UK registered vessels.

A total of 555 tonnes of prawns and shrimp species was landed in 2023 up 71.1% from 324 tonnes in 2022. This represented 1.0% of all shellfish landings to the UK, up from 0.6% in 2022.

Imports

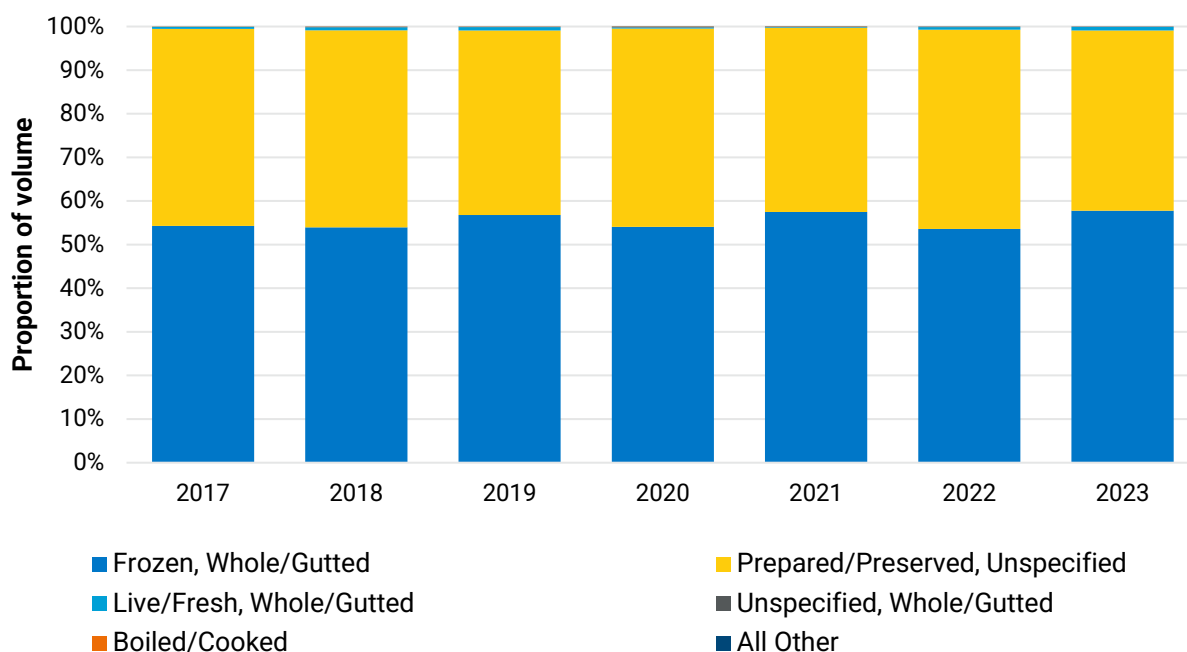
Most of the prawns and shrimp available in the UK for domestic consumption are imported from other countries.

In 2023, 16.5% of the overall value of total seafood imports to the UK were from prawns and shrimp, a decrease of 1.7 percentage points compared to 2022. They made up 12.0% of the overall volume of total seafood imports to the UK, a decrease of 0.1 percentage points.

The total value of prawns and shrimp imported to the UK in 2023 was £569.6 million, a decrease of £95.3 million (-14.3%) compared to 2022. This change followed lower volumes imported at lower prices. Import volume decreased by 4,741 tonnes (-6.1%) to 72,975 tonnes. The average price of imported prawns and shrimp decreased by £0.75/kg (-8.8%) between 2022 and 2023.

By volume, 50.8% of prawns and shrimp products are imported frozen and 48.5% are imported prepared and preserved. The proportion of frozen products increased in 2023 as a lower volume of prepared and preserved products were imported. Chart 1 below shows the share of prawns and shrimp products by format imported.

Chart 1. UK prawns and shrimp import volume by format in 2017 to 2022.



Over one fifth all prawns and shrimp imports were from Vietnam, with 66% from the top five countries of consignment as listed below in table 1. This shows more details of the top five exporting countries by import volume of prawns and shrimp.

Table 1. Imports to the UK of prawns and shrimp by exporting country (Top five)

Rank	Exporting Country	Volume (tonnes)		Growth (year on year)		Share of total prawns and shrimp imports
		2022	2023	Percentage	Actual (tonnes)	
1	Vietnam	18,203	15,854	-12.9%	-2349	22%
2	India	13,441	14,744	9.7%	1303	20%
3	Denmark	6,269	6,898	10.0%	629	9%
4	Ecuador	7,697	8,622	12.0%	925	12%
5	Honduras	4,858	4,439	-8.6%	-419	6%
	Grand Total	77,716	72,975	-6.1%	-4,741	

Prawns and shrimp were the fourth most imported species of seafood imported to the UK with tuna, salmon and cod being imported in higher volumes. In 2023 salmon (-11.9%) tuna (-12.4%) and cod (-7.9%) also experienced volume decline compared to 2022.

Exports

In 2023, 0.7% of the total exported seafood volume was from prawns and shrimp, down from 0.9% in 2022. By value prawns and shrimp represented 1.0% of seafood exports, down from 1.4% in 2022.

2,464 tonnes of prawns and shrimp were exported from the UK to other countries, worth £17.9m, this is a decline of 431 tonnes (-14.9%) and £5.8m (-24.3%) in 2023.

Over two thirds of all prawns and shrimp exports were to the Netherlands, with 83% from the top five destination countries as listed below in table 2. This shows more details of the top five importing countries by export volume of prawns and shrimp.

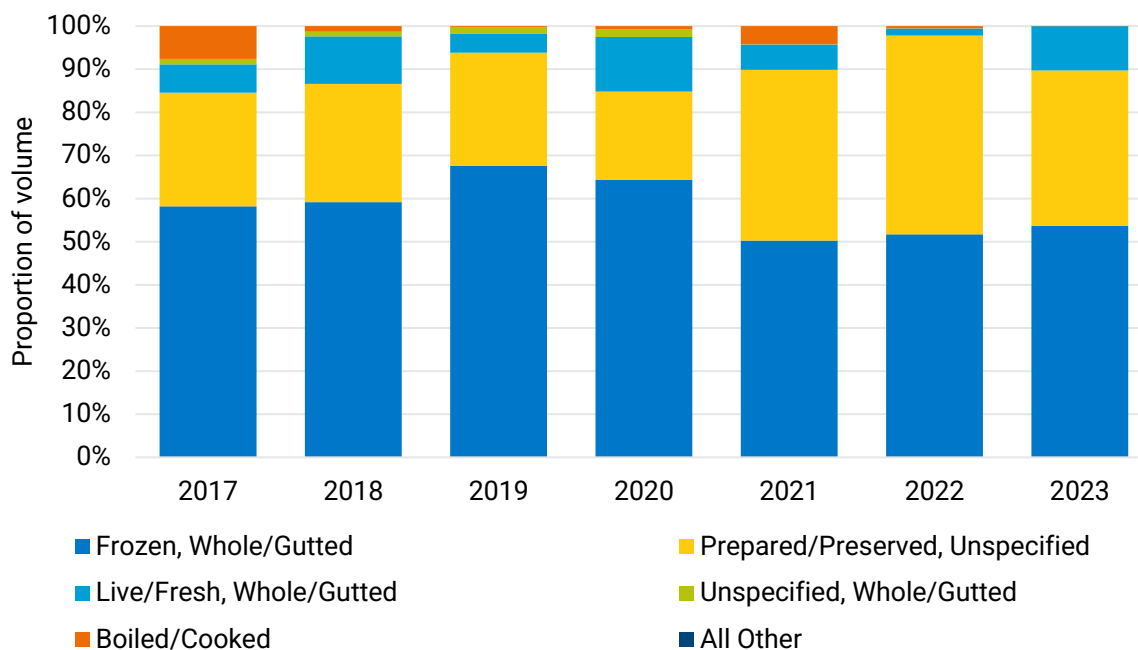
Table 2. Exports from the UK of prawns and shrimp by destination country (Top five)

Rank	Exporting Country	Volume (tonnes)		Growth (year on year)		Share of total prawns and shrimp exports
		2022	2023	Percentage	Actual (tonnes)	
1	Netherlands	1,322	1,587	20.1%	265	64%
2	Irish Republic	391	254	-35.1%	-137	10%
3	Germany	51	101	98.3%	50	4%
4	China	1	95	9971.1%	94	4%
5	Vietnam	202	95	-53.0%	-107	4%
	Grand Total	2,895	2,464	-14.9%	-431	

Prawns and shrimp exports represent 0.7% of total UK seafood export volume but 3.9% of total shellfish export volume. The top five exported species by volume included salmon, mackerel, herring, crabs, and trout. Except for salmon, all species experienced year on year volume growth.

Fresh/chilled were the only prawns and shrimp products to experience an increased volume exported (+423%). Frozen (-12.6%) and prepared/preserved (-33.4%) products experienced volume decline. Chart 2 below shows the share of prawns and shrimp export volume by format.

Chart 2. Prawns and shrimp export volume from the UK by format in 2010 to 2022.



Latest Quarterly UK Seafood Trade Data

The following is an extract from the latest quarterly UK Seafood Trade Data to June 2023 explaining in further detail the decline in shrimp and prawn imports.

Imported shrimp and prawn in decline.

In UK retail, both cold-water and warm-water prawn were in volume decline as shoppers trade out of these higher value products during the cost-of-living crisis. The market share of warm-water and cold-water shrimp and prawn products in the UK's seafood import market fell from 19.4% to 17.4% in the 4 quarters to Q2 2023 as £60.9m less (-9.0%) was imported. The volume imported dropped by 14,998 tonnes (-17.2%) over this 12-month period, down to 72,214 tonnes. Prices were 9.9% higher on average. Price inflation started easing this quarter at +9.9% down from +14.9% in the previous quarter.

The greatest decline in shrimp and prawn import was from Vietnam with 5,097 tonnes less imported (-24.2%) than a year ago. Vietnam's warm-water shrimp export volume experienced an increase in the first 5 months of 2023 with higher volumes exported to key markets of China, Hong Kong, USA, the EU, and Japan as average export prices to these markets eased. The proportion of Vietnam's warm-water

shrimp export destined for the UK declined, while export prices to the UK remained higher than a year ago. Generally, it is forecast that Vietnam's warm-water shrimp export will slow as production drops later in 2023, with the shortfall in global supply likely to be picked up by Ecuador.

Ecuador increased warm-water shrimp production at the start of 2023 and is expecting to increase production throughout the year. Ecuador had an increase in export volumes to top markets of China, Europe, and USA but a lower proportion to the UK. The average price of these exports fell more slowly for the UK market than other markets. However, import prices have started to fall compared to prices last year and may continue to fall as Ecuador production increases.

The volume of shrimp and prawn products, which are likely all cold-water species, imported from Greenland (via Denmark), Canada, Iceland and Norway dropped - 16.2% in the four quarters to Q2 2023.

Greenland is the largest supply area for cold-water shrimp to the UK. Lower consumer demand and price inflation during the cost-of-living crisis in the four quarters to Q2 2023 meant lower volumes of cold-water shrimp were imported than the year before. The year before, prices were particularly low and import volumes had risen. This led to the UK expanding its autonomous tariff quota (ATQ) of imported cold-water prawn from 6,500 tonnes to 9,700 tonnes for 2022, allowing higher volumes to be imported duty-free without the additional 20% tariff.

The decline in import volume in the four quarters to Q2 2023 may reverse later in the year as price inflation starts to ease and retail suppliers look to stock up for Christmas, however the ATQ duty-free quota was not carried over to 2023 which means that imports are more expensive than last year. Negotiations for a Greenland-UK free trade agreement (FTA) started in January 2022 but have not concluded and it is unclear if there is likely to be further tariff relief applied.

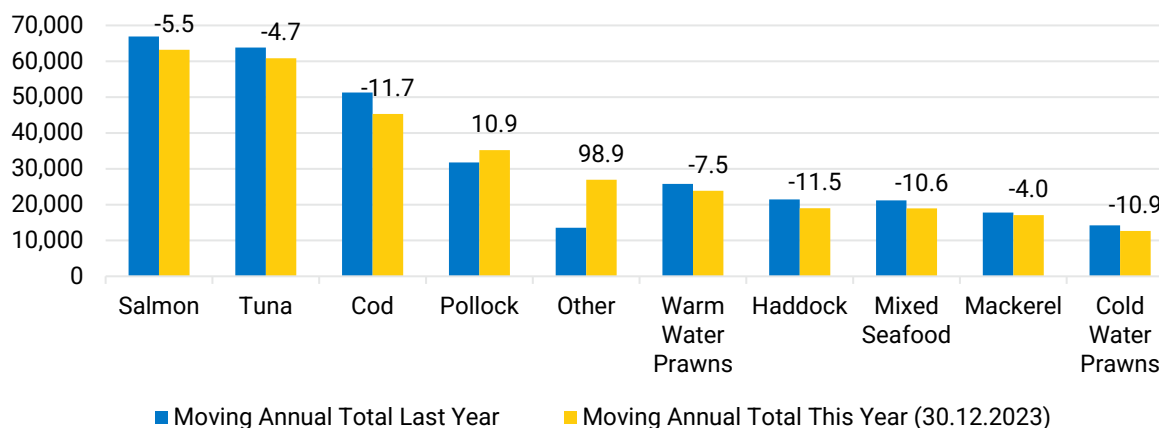
UK retail sector

Prawns and shrimp are popular shellfish species with UK consumers when purchasing seafood in the retail sector. This section provides details of consumer purchases of warm water prawns, cold water prawns and shrimp in the retail market, including shopper profiles.

Prawns and shrimp in the UK retail market

Warm water and cold water prawns remain in the top ten selling species in the UK retail market with shrimps ranking twenty-eighth in terms of volume sales. Chart 3 below illustrates the top ten selling species with year-on-year volume growth.

Chart 3. Volume sales (tonnes) of the top ten species in retail with volume percentage growth (%) to 52 week ending 30th December 2023.



Warm water prawns

By volume, warm water prawns were the sixth bestselling fish of all the seafood species sold in retail.

Warm water prawns' sales in retail

6% of all seafood volume sales in retail are to warm water prawns. UK shoppers purchased just over 23,850 tonnes of warm water prawns equating to a retail value of £407.1m over the 52 weeks ending 30th December 2023. Retail sales are decreasing in value by 0.1% despite increases in price per kg, up 8.0%. Volume sales are also in decline by 7.5%.

Warm water prawns' sales by sector

Almost two-thirds of the volume sales of warm water prawns are purchased in the chilled sector with the rest being sold frozen. There were no ambient sales of warm water prawns in retail in the 52 weeks to 30th December 2023.

Volume sales of warm water prawns experienced declines in both the chilled (-8.5%) and frozen (-5.9%) sectors compared to the same period in 2022. In terms of value, chilled experienced declines of 2.1% with frozen warm water prawns in 4.3% price driven growth.

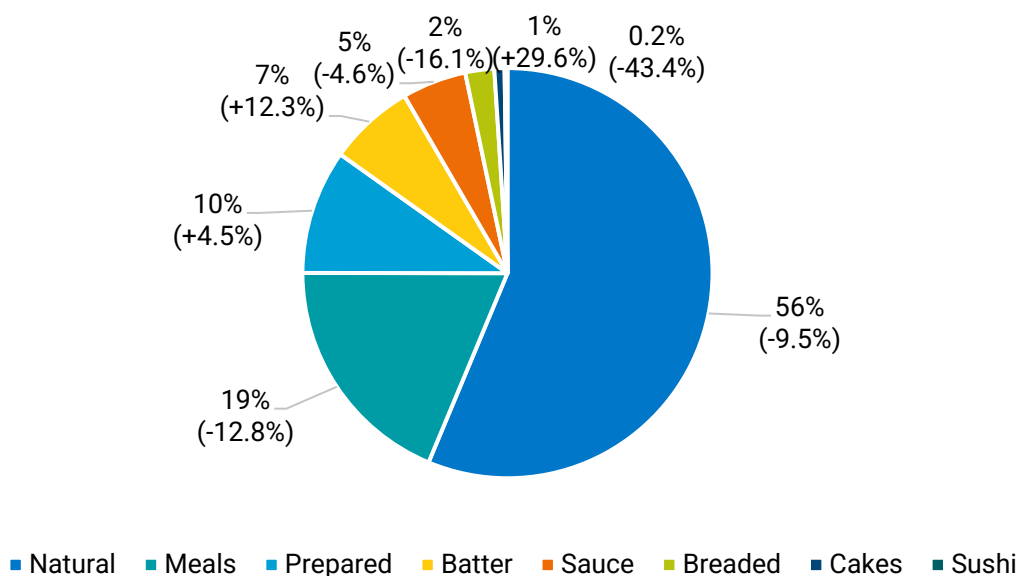
Warm water prawns' sales by segment

Warm water prawns are sold in eight product formats in retail known as segments; natural, meals, prepared, batter, sauce, breaded, cakes and sushi. There were no dusted or finger sales of warm water prawns in the 52 weeks to 30th December 2023.

Over half of all the volume sales of warm water prawns are natural (56.3%), this is followed by meals (18.7%), prepared (9.8%), batter (6.8%), sauce (5.1%), breaded (2.3%) cakes (0.8%) and sushi (0.2%).

Prepared (+4.5%), batter (+12.3%) and cakes (+29.6%) are the only segments experiencing volume growth with all other segments experiencing declines. Chart 4 below illustrates the volume share of warm water prawns by each segment with year-on-year growth.

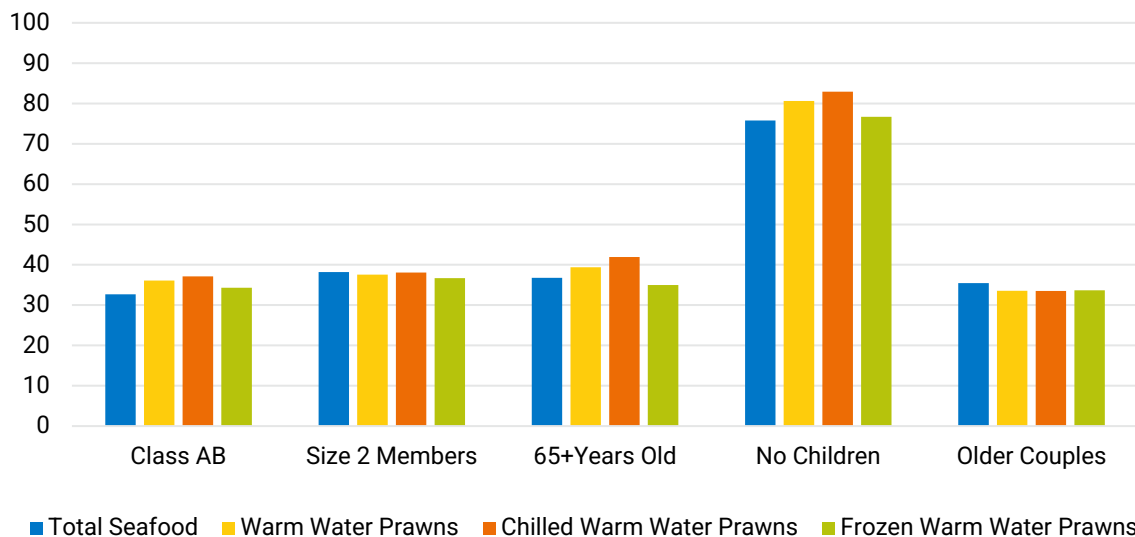
Chart 4. Volume sales share of warm water prawns in retail by segment with volume percentage growth (%) to 52 week ending 30th December 2023.



The warm water prawns' shopper (GB)

When comparing with the overall seafood shopper profile, the warm water prawn shopper is quite distinct. They are more affluent, from smaller households, are older and tend not to have children. Chart 5 below shows the warm water prawns shopper demographics by sector showing the differences between the total seafood shopper and warm water prawns' shopper.

Chart 5. Purchase volume share of trade by demographic across total seafood, warm water prawns and by chilled and frozen to 52 week ending 30th December 2023.



Overall frequency of purchases declined with less householders buying less volumes of warm water prawns.

Cold water prawns

By volume, cold water prawns were the tenth bestselling fish of all the seafood species sold in retail.

Cold water prawns' sales in retail

3% of all seafood volume sales in retail are cold water prawns. UK shoppers purchased just over 12,662 tonnes of cold water prawns equating to a retail value of £186.3m over the 52 weeks ending 30th December 2023. Retail sales are decreasing in value by 1.5% despite increases in price per kg, up 10.5%. Volume sales are also in decline by 10.9%.

Cold water prawns' sales by sector

Over one half of all volume sales of cold water prawns are purchased in the chilled sector with 42% being sold frozen. There were no ambient sales of cold water prawns in retail in the 52 weeks to 30th December 2023.

Volume sales of cold water prawns experienced declines in both the chilled (-12.1%) and frozen (-9.2%) sectors compared to the same period in 2022. In terms of value, both sectors experienced declines despite increases in price per kg; chilled -0.8% and frozen -2.7%.

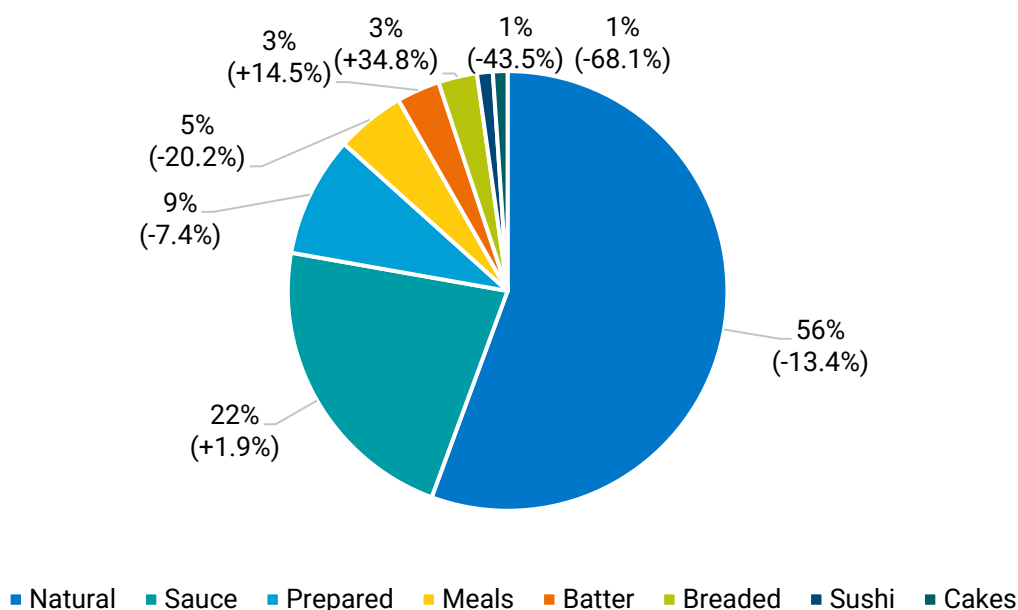
Cold water prawns' sales by segment

Cold water prawns are sold in eight product formats in retail known as segments; natural, sauce, prepared, meals, batter, breaded, sushi and cakes. There were no dusted or finger sales of warm water prawns in the 52 weeks to 30th December 2023.

Over half of all the volume sales of cold water prawns are natural (55.6%), this is followed by sauce (22.2%), prepared (8.9%), meals (5.1%), batter (3.2%), breaded (2.9%) sushi (1.2%) and cakes (1.1%).

Sauce (+1.9%), batter (+14.5%) and breaded (+34.8%) are the only segments experiencing volume growth with all other segments experiencing declines. Chart 6 below illustrates the volume share of cold water prawns by each segment with year-on-year growth.

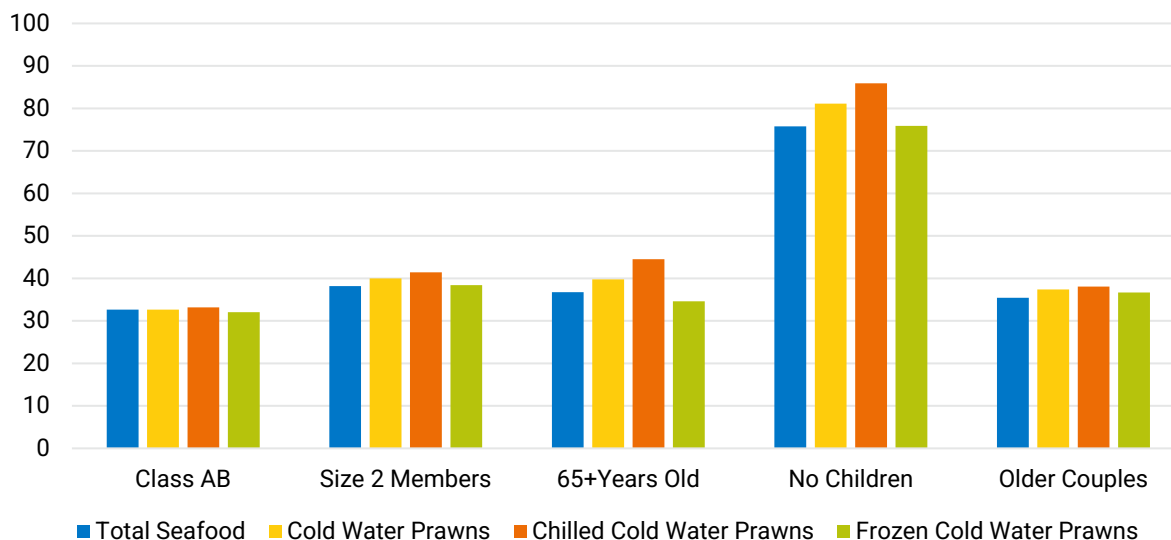
Chart 6. Volume sales share of cold water prawns in retail by segment with volume percentage growth (%) to 52 week ending 30th December 2023.



The cold water prawns' shopper (GB)

When comparing with the overall seafood shopper profile, the cold water prawn shopper is quite distinct. They are from smaller households, are older and tend not to have children. Chart 7 below shows the cold water prawns shopper demographics by sector showing the differences between the total seafood shopper and cold water prawns' shopper.

Chart 7. Purchase volume share of trade by demographic across total seafood, cold water prawns and by chilled and frozen to 52 week ending 30th December 2023.



Overall frequency of purchases declined with less householders buying less volumes of cold water prawns.

Shrimps

By volume, shrimps were the twenty-eight bestselling fish of all the seafood species sold in retail.

Shrimp sales in retail

0.1% of all seafood volume sales in retail are shrimps. UK shoppers purchased just over 569 tonnes of shrimps equating to a retail value of £9.0m over the 52 weeks ending 30th December 2023. Retail sales are decreasing in value by 11.4%, and despite decrease in price per kg, down 10.5%, volume sales are also in decline by 1.0%.

Shrimp sales by sector

84% of all shrimp volume sales are frozen with just 16% purchased in the chilled sector. There were no ambient sales of shrimps in retail in the 52 weeks to 30th December 2023.

Volume sales of shrimps experienced declines in both the frozen (-0.3%) and chilled (-4.3%) sectors compared to the same period in 2022. In terms of value, both sectors experienced declines even with decreases in price per kg; chilled -14.1% and frozen -9.9%.

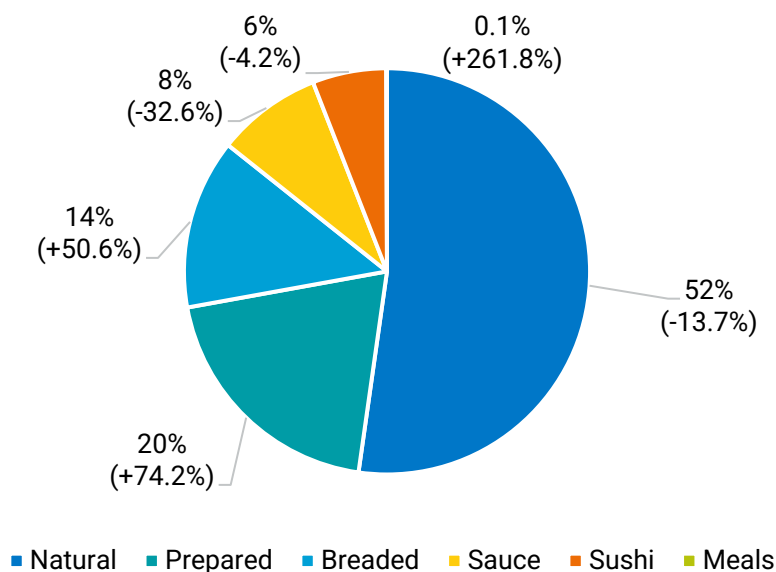
Shrimp sales by segment

Consumers purchase shrimp in six product formats in retail known as segments; natural, prepared, breaded, sauce, sushi, and meals. There were no shrimp sales of batter, dusted, fingers or cakes in the 52 weeks to 30th December 2023.

Over half of all the volume sales of shrimps are natural (52.2%), this is followed by prepared (19.9%), breaded (13.5%), sauce (8.4%), sushi (5.9%) and meals (0.1%).

Prepared (+74.2%), breaded (+50.6%) and meals (+261.8%) are the only segments experiencing volume growth with all other segments experiencing declines. Chart 8 below illustrates the volume share of shrimps by each segment with year-on-year growth.

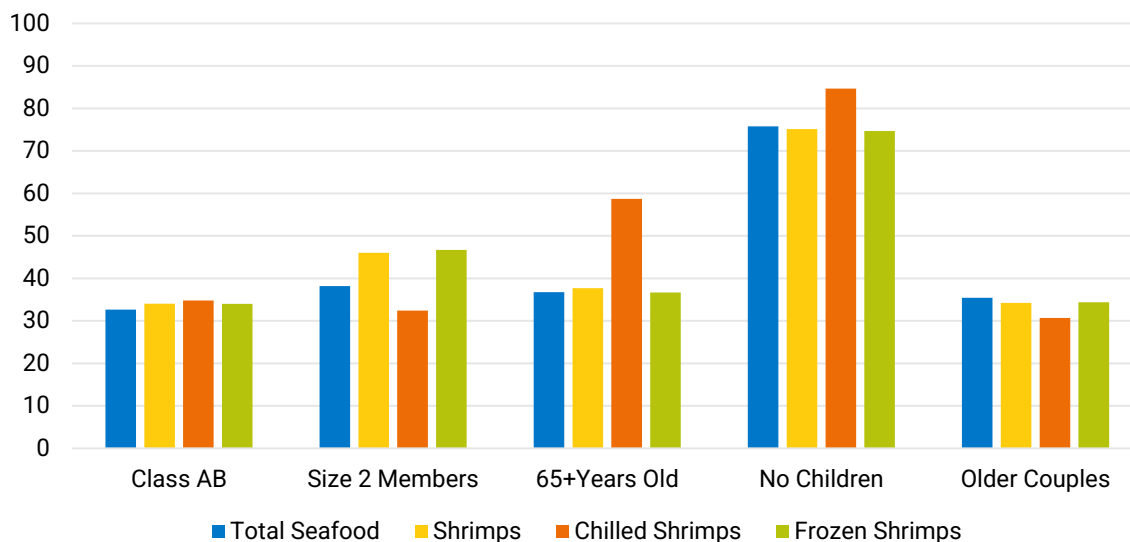
Chart 8. Volume sales share of shrimps in retail by segment with volume percentage growth (%) to 52 week ending 30th December 2023.



The shrimp shopper (GB)

When comparing with the overall seafood shopper profile, the shrimp shopper is quite distinct, being older and from smaller households. Chart 9 below shows the shrimp shopper demographics by sector showing the differences between the total seafood shopper and the shrimp shopper, and the differences between the sectors.

Chart 9. Purchase volume share of trade by demographic across total seafood, shrimps and by chilled and frozen to 52 week ending 30th December 2023.



GB Foodservice

Prawns and shrimp are popular species with GB consumers when eating out of home. This section provides details of consumer purchases of prawn and shrimp out of home including consumer demographics.

When eating out of home, diners purchase prawns and shrimp in a range of formats from cocktails to battered and breaded. Consumers purchase prawns and shrimp across six different channels, but they are most enjoyed in Quick Service Restaurants.

Due to limitations in the foodservice data prawns and shrimp are not distinguishable and will therefore be presented as an overall product group.

Total performance and channel performance

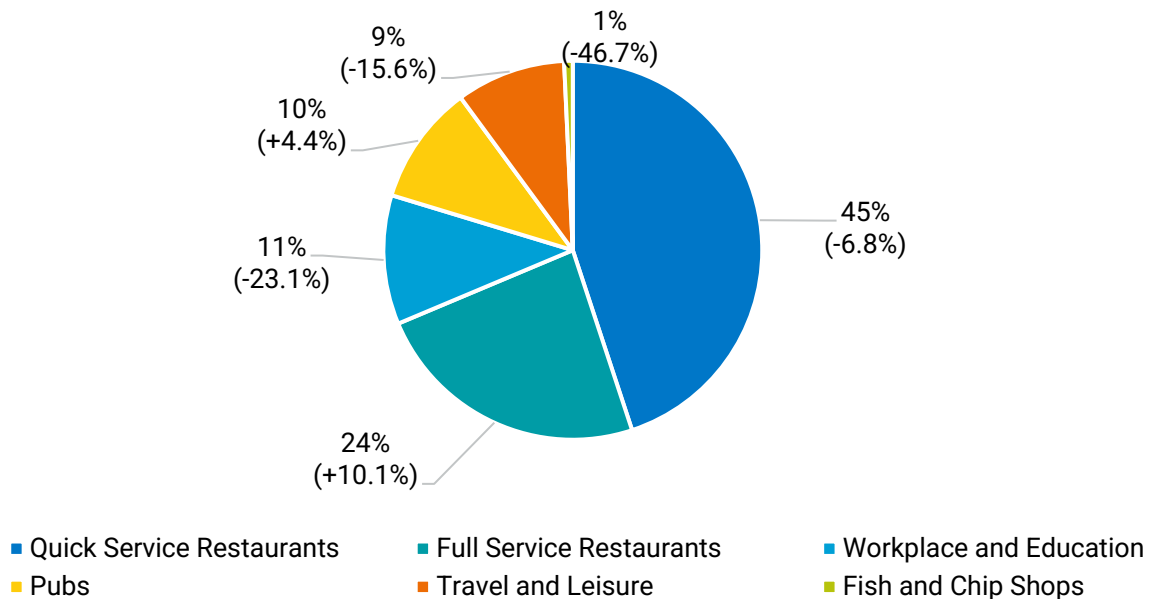
Of the total seafood servings out of home (988m servings), prawns and shrimp account for 8% (82m servings), approximately 11,515 tonnes. Overall, it was a weak year to December 2023 for prawns and shrimp with servings down 6% on the previous year.

**Tonnes is an estimation calculated by the total number of servings sold multiplied by 140g, the recommended serving size of seafood.*

Almost a half of all prawns and shrimp servings are sold through the Quick Service Restaurant channel (45%), this is followed by Full-Service Restaurants (24%),

Workplace and Education (11%), Pubs (10%), Travel and Leisure (9%) and Fish and Chip Shops (1%). Servings growth was seen in Full-Service Restaurants and Pubs with all other channels experiencing declines. Chart 10 below shows the servings share with year-on-year growth.

Chart 10. Servings share of prawn and shrimp by GB foodservice channel with servings growth (%) to 12 months year end December 2023.



Consumer demographics and motivations

Compared to total foodservice, prawns, and shrimp over indexes with consumers aged 18 to 24 and 50 to 64. This is more apparent in Pubs, where one fifth off all servings of prawns and shrimp are to 18 to 24 year olds, but in contrast to total prawn servings, in pubs over two fifths are to consumers over 65.

They appeal to a more affluent consumer where 74% of all prawns and shrimp servings are from, this is compared to 68% of total food and drink servings. This is more apparent in Pubs and Full Service Restaurants. They are equally appealing to all genders, but more popular with female consumers at Pubs.

Prawns and shrimp are most consumed on adult only occasions, especially at Quick Servings Restaurants. Servings usually occur during lunch and dinner, with more lunch time consumption in Pubs and more dinner time servings in Full Service Restaurants. Consumption of prawns and shrimp over indexes the market on Sundays except for Pubs where over a third of all servings are on a Monday.

Consumers turn to prawns and shrimp during social occasions, especially at Pubs and Full Service Restaurants. There is an opportunity for prawns and shrimp to be

seen as a more convenience food type out of home. There is also an opportunity to appeal to families with weekdays providing a good growth opportunity too.

Sources

Data sources: (%) values represent changes from the previous year unless otherwise stated.

Resources used in the production of this factsheet can be viewed below.

NielsenIQ (NIQ) retail data to 52 week ending 30th December 2023:

- ScanTrack – UK EPOS from key retailers (including composite data from discounters Aldi, Lidl, and Northern Ireland) excludes seafood sandwiches.
- HomeScan – GB (including discounters) consumer panel of 15,000 households excludes seafood sandwiches.

Circana foodservice data:

- Panel based data to year ending December 2023.

HMRC trade data**:

- Import, exports HMRC data provided by BTS data to year ending December 2023. Published data is provisional for 18 months once published and subject to change during this time. Please see trade notes below.

MMO landings data**:

- UK sea fisheries annual statistics provided by the Marine Management Organisation to year ending December 2023. Please see trade notes below.

Additional data and insights used to produce this factsheet:

- Seafish, 2023, Seafood Segments in the Retail Market
- Seafish, 2023, Seafood Trends in Commercial Foodservice (2023 Update)
- Seafish, 2023, Latest Quarterly UK Seafood Trade Data

Are you interested in the data behind the insights? Individuals working for seafood businesses can register for the Market Insight Portal on [Seafish.org](https://www.seafish.org) and access the [Retail](#), [Foodservice](#), and [Trade](#) data and reports directly. [Click here to register today.](#)

****Trade data**

Notes and limitations of the trade and landings data.

HMRC trade in goods statistics cover seafood products imported to and exported from UK ports and presented as 8-digit combined nomenclature commodity (CN8) codes. We process these statistics using the EUMOFA (EU Market Observatory for Fisheries and Aquaculture) methodology. This allows for analysis of the value and volume of main commercial species, species groups, preservation and presentation states traded with the UK by partner country. Published data is provisional for 18-months and subject to change over this time.

The species defined in trade statistics are defined based on CN8 commodity codes. Some traded commodities may include products containing a variety of different species or groups of species, meaning that individual species can't be identified.

Prawns and shrimp products in trade and goods statistics of commodity codes 16052900, 16052190 and 03061799 allocated as "Miscellaneous" shrimp and prawn products. Warm water or cold water species can't be identified from the 8 digit commodity code.

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