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seafish

# Sushi in Multiple Retail 2024

A market insight analysis (20m read)

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## What is sushi?

Sushi is a popular Japanese dish that primarily consists of vinegared rice, combined with various ingredients such as raw or cooked seafood and vegetables.

The rice is a key component that differentiates sushi from other similar dishes such as sashimi which is thinly sliced raw fish or meat served without rice and kamaboko which is a cooked processed seafood often shaped to look like a crab or pealed prawn meat.

Common types of sushi include:

**Nigiri:** Hand-pressed rice balls topped with slices of raw or cooked fish, seafood, or other ingredients.

**Maki:** Rolled sushi, typically made by wrapping fish, vegetables, and rice in seaweed (nori) and slicing it into bite-sized pieces. Variations include hosomaki (thin rolls) and futomaki (thick rolls)

**Temaki:** Hand-rolled sushi in the shape of a cone, filled with rice, fish, and vegetables.
Sashimi:

## Sushi performance

Seafood sushi products have performed strongly over both the long and short term, trending with younger consumers, resonating with the interest in Japanese culture, and eastern food trends. Being visually attractive (instagrammable), aspirational and healthy, as well as convenient for both for office lunches and a dining in treat to save money has helped sushi grow.

In the 52 wks. to April 2024, retail seafood sushi sales were worth £178m (+4.7%), with a volume of 9,960 tonnes (+0.4%) and an average price of £17.84/kg (+4.3%). Currently sushi is only sold in a chilled format and is ranked as the 8th most popular seafood segment by value and 9th by volume, having the highest average price out of all ten seafood segments. Over the long term (10 years) sushi has seen the highest value and volume growth of all ten segments, up +121% and 58% respectively.

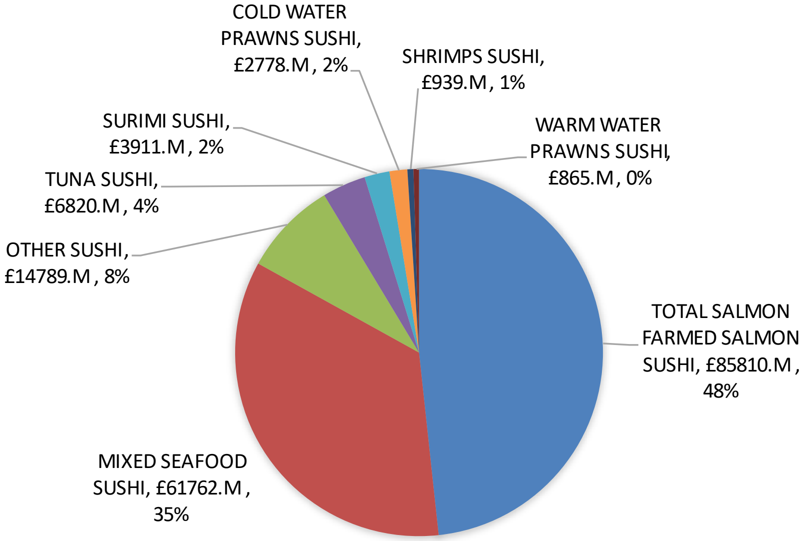
### Sushi sector and segment performance to 2024

| | Value Sales £ ('000) | | | | | Volume Sales (tonnes) | | | | | Price per Kg | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2022 52wks to 20.4.22 | 2023 52wks to 20.4.23 | 2024 52wks to 20.4.24 | % Chg '23 vs '24 | % Chg 2014 vs 2024 (10YA)* | 2022 52wks to 20.4.22 | 2023 52wks to 20.4.23 | 2024 52wks to 20.4.24 | % Chg '23 vs '24 | % Chg 2014 vs 2024 (10YA)* | Avg Price 2024 | % Chg '23 vs '24 | % Chg 2014 vs 2024 (10YA)* |
| FISH | 4,107,164 | 4,117,021 | 4,332,516 | 5.2 | 12.9 | 407,296 | 378,926 | 384,504 | 1.5 | -18.0 | £11.27 | 3.7 | 37.7 |
| FRESH | 2,559,856 | 2,541,582 | 2,688,629 | 5.8 | 19.6 | 187,766 | 171,475 | 167,653 | -2.2 | -9.1 | £16.04 | 8.2 | 31.5 |
| FROZEN | 1,011,340 | 1,031,378 | 1,066,259 | 3.4 | 11.9 | 136,938 | 127,728 | 136,172 | 6.6 | -27.2 | £7.83 | -3.0 | 53.7 |
| AMBIENT | 535,968 | 544,062 | 577,628 | 6.2 | -11.1 | 82,592 | 79,723 | 80,679 | 1.2 | -22.0 | £7.16 | 4.9 | 14.0 |
| TOTAL NATURAL | 1,799,072 | 1,774,996 | 1,887,773 | 6.4 | 14.6 | 123,289 | 111,380 | 108,914 | -2.2 | -12.9 | £17.33 | 8.8 | 31.5 |
| TOTAL PREPARED | 906,328 | 892,587 | 918,753 | 2.9 | -3.8 | 108,220 | 102,515 | 101,569 | -0.9 | -22.0 | £9.05 | 3.9 | 23.5 |
| TOTAL BATTER | 224,282 | 235,897 | 269,913 | 14.4 | 96.6 | 27,428 | 24,300 | 26,274 | 8.1 | 8.1 | £10.27 | 5.8 | 81.8 |
| TOTAL BREADED | 266,845 | 258,753 | 267,702 | 3.5 | 3.3 | 30,402 | 26,050 | 26,500 | 1.7 | -33.9 | £10.10 | 1.7 | 56.2 |
| TOTAL FINGERS | 191,743 | 206,936 | 214,199 | 3.5 | 39.8 | 35,323 | 36,357 | 45,633 | 25.5 | -9.1 | £4.69 | -17.5 | 53.8 |
| TOTAL MEALS | 202,917 | 212,264 | 209,584 | -1.3 | 21.8 | 29,029 | 26,713 | 24,405 | -8.6 | -21.7 | £8.59 | 8.1 | 55.5 |
| TOTAL SAUCE | 177,453 | 183,599 | 191,005 | 4.0 | -23.4 | 20,847 | 20,240 | 19,461 | -3.8 | -42.4 | £9.81 | 8.2 | 32.9 |
| TOTAL SUSHI | 157,654 | 169,665 | 177,700 | 4.7 | 121.1 | 9,601 | 9,919 | 9,960 | 0.4 | 58.1 | £17.84 | 4.3 | 39.8 |
| TOTAL CAKES | 125,431 | 129,072 | 137,902 | 6.8 | 2.3 | 18,050 | 17,158 | 17,235 | 0.5 | -16.2 | £8.00 | 6.4 | 22.2 |
| TOTAL DUSTED | 55,438 | 53,251 | 57,985 | 8.9 | 7.9 | 5,107 | 4,293 | 4,553 | 6.0 | -26.5 | £12.74 | 2.7 | 46.7 |
| | | | | | | | | | | | | | |
| TOTAL SALMON FARMED SALMON SUSHI | 55,511 | 69,951 | 85,810 | 22.7 | 641.0 | 2,725 | 3,667 | 4,556 | 24.2 | 492.2 | £18.84 | -1.2 | 25.2 |
| MIXED SEAFOOD SUSHI | 74,144 | 70,100 | 61,762 | -11.9 | 88.1 | 5,189 | 4,523 | 3,665 | -19.0 | 58.9 | £16.85 | 8.7 | 18.4 |
| OTHER SUSHI | 13,866 | 14,757 | 14,789 | 0.2 | -69.6 | 887 | 859 | 886 | 3.1 | -77.8 | £16.69 | -2.8 | 37.0 |
| TUNA SUSHI | 6,561 | 5,817 | 6,820 | 17.2 | 1,226.3 | 346 | 318 | 357 | 12.2 | 864.9 | £19.09 | 4.5 | 37.5 |
| SURIMI SUSHI | 1,038 | 2,816 | 3,911 | 38.9 | #N/A | 83 | 199 | 264 | 32.7 | #N/A | £14.81 | 4.6 | #N/A |
| COLD WATER PRAWNS SUSHI | 4,031 | 3,957 | 2,778 | -29.8 | -19.6 | 224 | 223 | 140 | -37.2 | -59.6 | £19.85 | 11.8 | 98.8 |
| SHRIMPS SUSHI | 944 | 727 | 939 | 29.2 | 2,929.0 | 48 | 33 | 39 | 17.9 | 1,850.0 | £24.25 | 9.6 | 45.6 |
| WARM WATER PRAWNS SUSHI | 1,167 | 1,346 | 865 | -35.7 | 6,546.2 | 72 | 84 | 52 | -38.4 | 5,100.0 | £16.77 | 4.4 | 64.4 |

*Nielsen Scantrack YE 20.04.24 (*10yr GB – species %Chg 8yr GB)*

Salmon sushi is the most popular in UK retail, taking nearly half (48%), of all sushi sales in 2024, followed by mixed seafood sushi (35%), and 'other' where the seafood species is not named (8%). Salmon, surimi and shrimp sushi showed the fastest growth compared to last year, whilst mixed seafood and prawn sushi declined. Over the long term, many sushi seafood species achieved triple digit growth, the exception being 'other' and cold water prawn sushi where sales declined

## UK species share of sushi by Value 2024




*Nielsen Scantrack YE 20.04.24*

## The sushi shopper

In 2024, sushi key point indicators (KPI's) remained strong. Compared with last year, a similar number of shoppers bought sushi, slightly less often, but spending more on larger baskets. Shoppers bought an average 0.28kg of sushi per trip, spending on average £4.28 per trip; and bought sushi 5 times per year, spending a total of £21.30 on 1.4 kg/yr.

### Sushi seafood Key Point Indicators (KPI's) 2024

| | | Pen % | Freq | AWOP (Kg) 52w | Avg Spend (£) 52w | Trip Spend (£) | Price per Kg | Avg Trip Kg |
|---|---|---|---|---|---|---|---|---|
| TOTAL SEAFOOD | 22 APR 2023 | 95.2 | 29.00 | 14.50 | £143.79 | £4.95 | £9.95 | 0.50 |
| | 20 APR 2024 | 94.7 | 29.40 | 14.80 | £151.96 | £5.18 | £10.29 | 0.50 |
| | % Change | -0.5 | 1.1 | 2.2 | 6.0 | 4.5 | 3.4 | 1.1 |
| CHILLED SEAFOOD | 22 APR 2023 | 80.9 | 19.20 | 7.50 | £99.45 | £5.19 | £13.33 | 0.39 |
| | 20 APR 2024 | 80.3 | 19.30 | 7.50 | £106.31 | £5.50 | £14.19 | 0.39 |
| | % Change | -0.6 | 0.9 | 0.4 | 7.0 | 5.9 | 6.4 | -0.5 |
| FROZEN SEAFOOD | 22 APR 2023 | 84.1 | 10.50 | 5.80 | £45.44 | £4.33 | £7.89 | 0.55 |
| | 20 APR 2024 | 82.8 | 10.50 | 6.20 | £47.63 | £4.53 | £7.74 | 0.58 |
| | % Change | -1.5 | 0.2 | 6.8 | 5.0 | 4.6 | -1.9 | 6.6 |
| AMBIENT SEAFOOD | 22 APR 2023 | 75.0 | 9.20 | 3.90 | £24.42 | £2.66 | £6.35 | 0.42 |
| | 20 APR 2024 | 74.3 | 9.40 | 3.90 | £25.71 | £2.74 | £6.65 | 0.41 |
| | % Change | -0.9 | 2.4 | 0.3 | 5.0 | 2.8 | 4.7 | -2.1 |
| CHILLED SUSHI | 22 APR 2023 | 13.3 | 5.00 | 1.40 | £20.67 | £4.14 | £15.26 | 0.27 |
| | 20 APR 2024 | 13.3 | 5.00 | 1.40 | £21.30 | £4.28 | £15.58 | 0.28 |
| | % Change | -0.1 | -0.2 | 1.5 | 3.0 | 3.2 | 2.1 | 1.7 |

*Nielsen Homescan YE 20.04.24*

Nielsen demographics define the chilled sushi shopper as predominantly younger and more affluent (higher percentage of AB/C1 shoppers) than the general seafood shopper, with a higher proportion of shoppers in the under 35 and 35-44 age groups, typically in one person households without children present. Where children are present, they are typically aged 5-15 yrs.

### Sushi demographics % shoppers (by volume) 2024

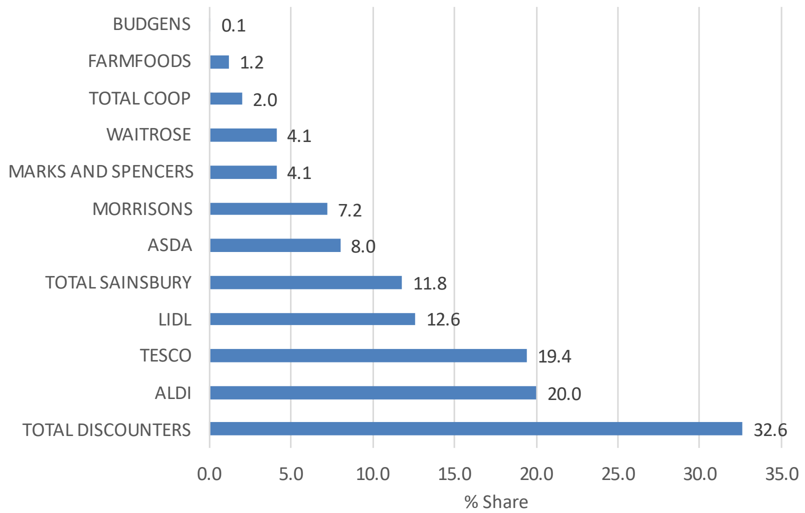
| | TOTAL FISH | AMBIENT | CHILLED | FROZEN | CHILLED SUSHI |
|---|---|---|---|---|---|
| CLASS AB | 32.2 | 36.7 | 28.7 | 29.0 | 34.0 |
| CLASS C1 | 30.7 | 30.3 | 30.8 | 31.2 | 34.5 |
| CLASS C2 | 17.2 | 15.8 | 17.8 | 18.9 | 12.8 |
| CLASS D | 12.9 | 10.8 | 15.0 | 13.3 | 9.4 |
| CLASS E | 7.1 | 6.4 | 7.6 | 7.6 | 9.3 |
| SIZE 1 MEMBER | 24.4 | 27.7 | 20.8 | 23.8 | 30.8 |
| SIZE 2 MEMBERS | 38.0 | 41.8 | 34.8 | 35.9 | 27.5 |
| SIZE 3.4 MEMBERS | 30.0 | 25.9 | 33.8 | 31.9 | 35.4 |
| SIZE > 5 MEMBERS | 7.5 | 4.5 | 10.7 | 8.4 | 6.3 |
| <35 YEARS | 12.1 | 10.2 | 14.1 | 12.6 | 21.4 |
| 35 TO 44 YEARS | 15.1 | 12.4 | 17.2 | 17.2 | 21.5 |
| 45 TO 64 YEARS | 35.7 | 33.9 | 36.3 | 38.5 | 37.6 |
| 65+ YEARS | 37.0 | 43.5 | 32.4 | 31.6 | 19.6 |
| CHILDREN YES | 24.1 | 18.0 | 30.1 | 26.3 | 32.3 |
| CHILDREN NO | 75.9 | 82.0 | 69.9 | 73.7 | 67.7 |
| CHILD 0 TO 4 YEARS | 22.7 | 23.4 | 23.1 | 21.0 | 14.7 |
| CHILD 5 TO 10 YEARS | 39.6 | 38.2 | 41.3 | 37.9 | 41.4 |
| CHILD 11 TO 15 YEARS | 37.7 | 38.4 | 35.7 | 41.1 | 43.9 |
| PRE FAMILY | 6.3 | 6.2 | 6.1 | 6.8 | 14.2 |
| NEW FAMILY | 4.4 | 4.0 | 4.9 | 4.2 | 3.8 |
| MATURING FAMILIES | 12.5 | 8.3 | 16.9 | 13.3 | 17.2 |
| ESTABLISHED FAMILIES | 9.7 | 7.8 | 10.9 | 11.7 | 13.5 |
| POST FAMILIES | 14.1 | 14.0 | 13.3 | 15.7 | 17.7 |
| OLDER COUPLES | 35.3 | 39.1 | 32.8 | 31.8 | 18.6 |
| OLDER SINGLES | 17.7 | 20.6 | 15.1 | 16.5 | 15.1 |

*Nielsen Homescan YE 20.04.24*

## Where do shoppers buy sushi?

In 2024, Aldi sold the most sushi taking 20% of UK sushi sales by volume, followed by Tesco and Lidl. Surprisingly stores which attract affluent shoppers such as Waitrose and Marks and Spencer's, under trade on sushi, perhaps due to the older age demographic.

### Sushi share of trade (by volume) 2024




*Nielsen Homescan YE 20.04.24*

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Data Sources: (%) values represent change from the previous year unless otherwise stated

Nielsen:

- Scantrack – UK EPOS from key retailers (including composite data from discounters Aldi & Lidl and N. Ireland) excludes seafood sandwiches - GB EPOS excludes discounters
- Homescan – GB (including discounters) consumer panel of 15,000 households excludes seafood sandwiches
- Defra Family Food Survey 2023 release

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