

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



Seafood in multiple retail (2020 update)

A market insight analysis (20m read - [jump to the Key Facts](#))

September 2020 Richard Watson

Market Insight Factsheet: Seafood in multiple retail (2020 update)

This factsheet provides a summary of the performance of seafood in multiple retail to June 2020.

The COVID-19 pandemic has had a huge impact on UK grocery, with retail gaining additional sales from panic buying and the closure of many foodservice businesses. Panic buying in March 2020, saw total seafood weekly volume sales grow by 58%. Frozen seafood consumption briefly outstripped chilled for the first time since 2005 and the struggling ambient sector (canned and shelf stable), saw a +117% boost as shoppers prioritised cupboard and freezer staples. Subsequently sales have fallen but total seafood weekly volume sales remain up +8.7% on last year.

Compared with last year, more shoppers are buying seafood, shopping more often and spending more on larger baskets. Seafood is also becoming a younger and more affluent purchase with fewer families buying seafood. In addition, there is a shift away from the core two person household towards larger (>5 person) households.

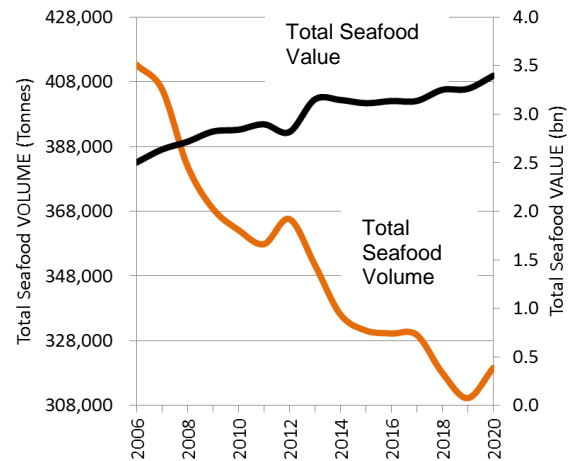
Historic retail seafood sector trends

Over the long term, GB (excluding discounters) retail seafood sales have been in price driven growth as inflation drives up average price whilst volumes decline. UK and discounter data has only been available to Seafish for a few years so as yet there is insufficient data to draw on for long term trends.

Arriving in early 2020, the COVID-19 pandemic has had a huge impact on the performance and priorities of UK retail. Panic buying gave a significant boost to seafood sales, this along with the subsequent closure of many foodservice outlets has helped weekly seafood sales remain 8.7% higher than last year.

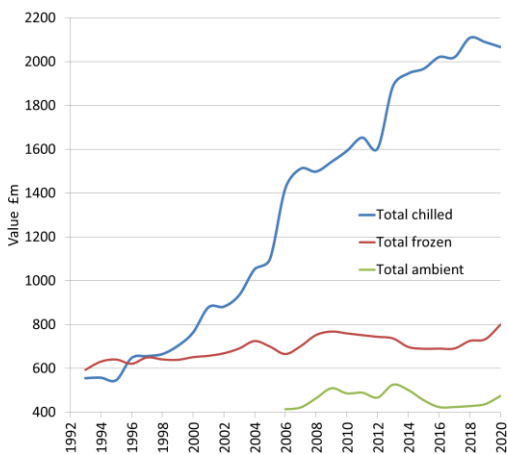
Chilled seafood continues to dominate the seafood category. Although chilled sales did not peak as high as frozen and ambient during panic buying, the chilled sector is proving to be more resilient, taking longer in falling back to pre COVID levels.

Long Term GB Total Seafood Sector Trends



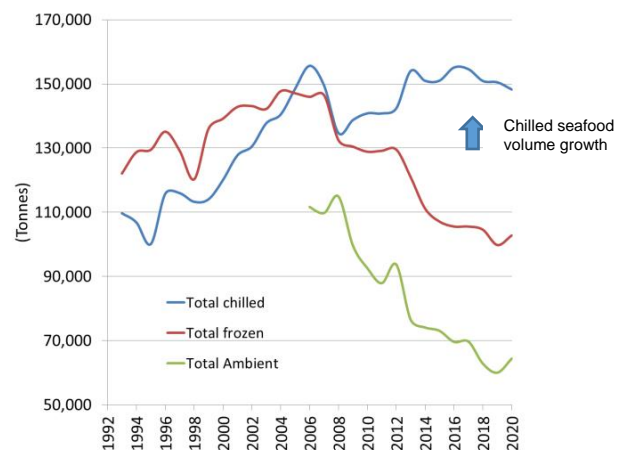
Nielsen Scantrack YE 13.06.20

Long Term GB Seafood Sector Value Trends.



Nielsen GB Scantrack/TNS

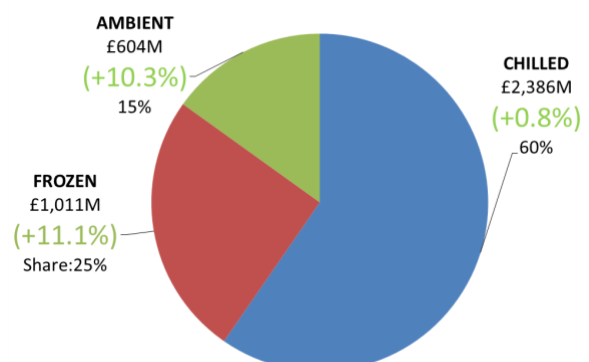
Long Term GB Seafood Sector Volume Trends.



Current UK seafood retail performance

In the 52 wks. to June 2020, the total seafood category showed healthy growth driven by the boost in sales from panic buying, home working, school closures and the subsequent restrictions on foodservice. Sales were worth £4.0bn (+4.6%), with a volume of 412,267 tonnes (+5.0%) and an average price of £9.71/kg (-0.4%) (Nielsen Scantrack: 52 weeks to 13.6.20).

UK Seafood Sector Share by Value 2020



- Chilled seafood continues to dominate UK retail sales, but the chilled seafood sector saw only modest growth compared to frozen and ambient. In the 52 wks. to June 2020, chilled was worth £2,385m (+0.8%) with a volume of 182,199 tonnes (+2.0%) and average price of £13.10/kg (-1.2%).
- Frozen saw a significant increase in volume, value and average price; worth £1,011m (+11.1%) with a volume of 139,028 tonnes (+5.9%) and average price of £7.27/kg (+4.9%).
- Ambient also saw a significant increase in both volume and value, worth £604m (+10.3%) with a volume of 91,039 tonnes (+10.0%). Average price remained flat at £6.64/kg (+0.2%).

Total seafood segment performance

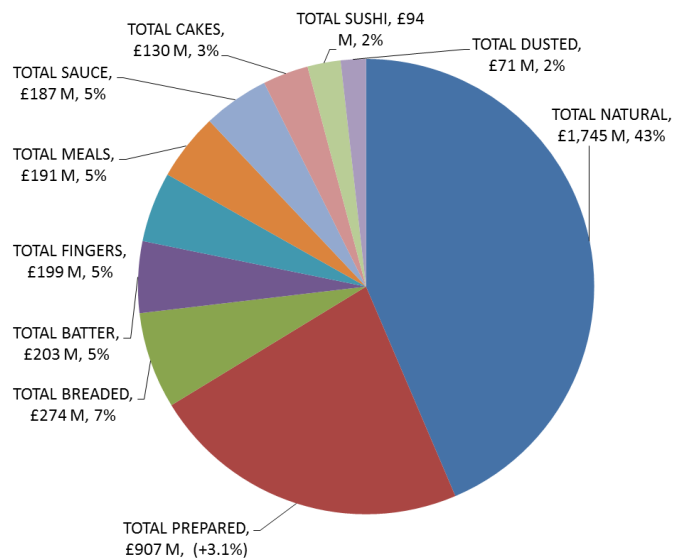
Total seafood can be split into 10 segments (by product type). The total natural segment (no additional ingredients) currently takes the largest share, by both value 43% (-1.0%pp) percentage point change), and volume 29% (+2.0pp), of the total UK seafood category. Total natural, along with the total prepared segment (where other items are present e.g. cod and bacon kebabs) together make up nearly three quarters of the retail seafood category by value.

This year, home working and school closures boosted coated segment seafood sales. Resulting in breaded battered and fingers pushing meals back from 3rd into 6th place.

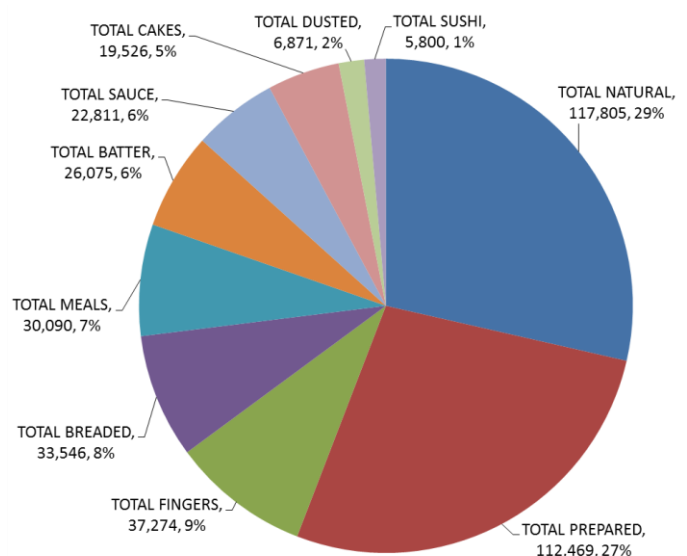
Compared to last year most segments were in full growth, with only sauce, meals and sushi in decline. Over the short term (52 wks. to 15th June 2019), the coated segments, breaded, battered, fingers showed the strongest growth. The growth in these segments principally driven by demand for frozen formats

Over the long term (ten years to June 2020) only natural, fingers and cake segments were in full growth. Only meals, sauce and dusted were in full decline.

Segment Value Share of UK Total Seafood 2020



Segment Volume Share of UK Total Seafood (tonnes) 2020



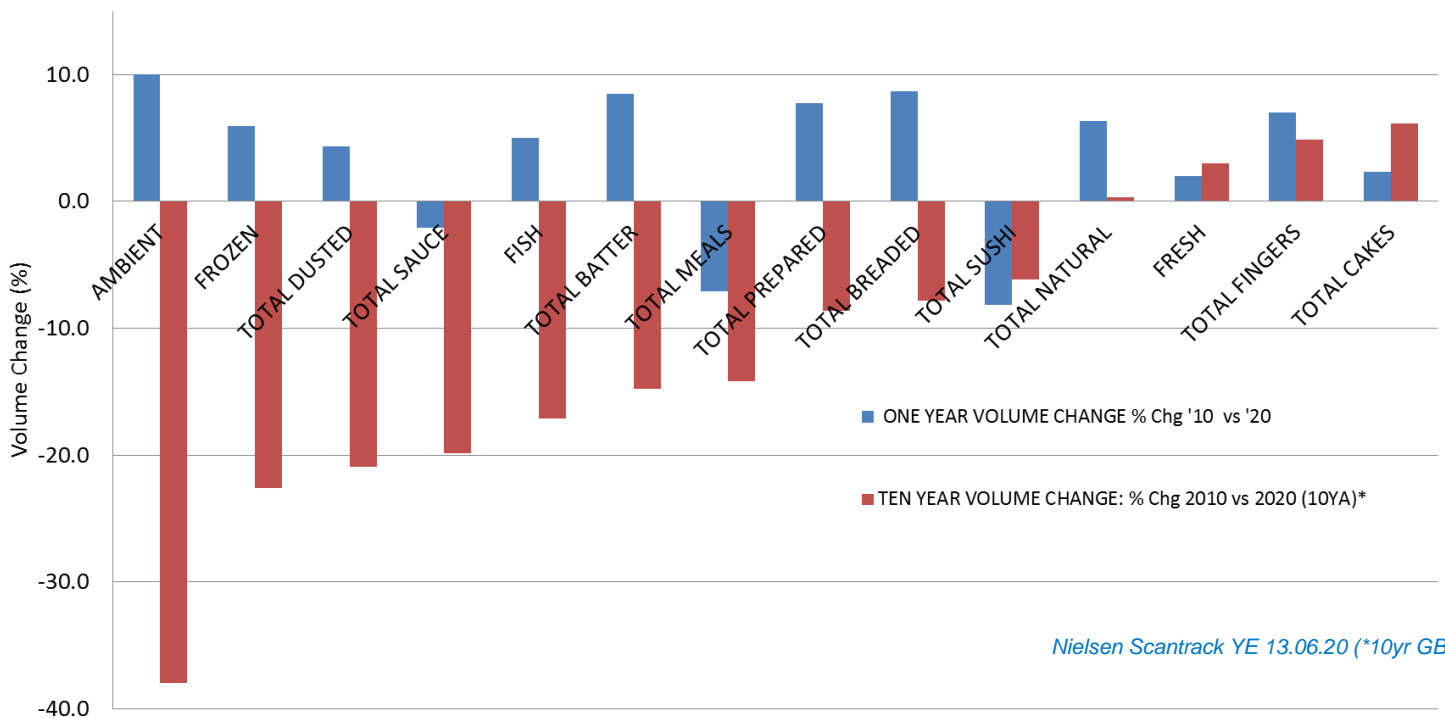
Nielsen Scantrack YE 13.06.20

UK total seafood sector and segment performance to 2020

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2018 52wks to 13.6.18	2019 52wks to 13.6.19	2020 52wks to 13.6.20	% Chg '19 vs '20	% Chg 2010 vs 2020 (10YA)*	2018 52wks to 13.6.18	2019 52wks to 13.6.19	2020 52wks to 13.6.20	% Chg '19 vs '20	% Chg 2010 vs 2020 (10YA)*	Avg Price 2020	% Chg '19 vs '20	% Chg 2010 vs 2020 (10YA)*
TOTAL SEAFOOD	3,810,107	3,824,874	4,001,435	4.6	17.2	395,573	392,615	412,267	5.0	-17.1	£9.71	-0.4	41.5
FRESH	2,362,572	2,366,890	2,385,992	0.8	29.7	176,275	178,618	182,199	2.0	3.0	£13.10	-1.2	25.9
FROZEN	908,951	909,902	1,011,121	11.1	5.1	135,078	131,239	139,028	5.9	-22.6	£7.27	4.9	35.7
AMBIENT	538,584	548,082	604,322	10.3	-4.1	84,220	82,758	91,039	10.0	-38.0	£6.64	0.2	54.7
TOTAL NATURAL	1,663,984	1,689,847	1,744,517	3.2	6.7	107,574	110,805	117,805	6.3	0.3	£14.81	-2.9	6.4
TOTAL PREPARED	860,319	851,596	907,478	6.6	3.1	107,609	104,414	112,469	7.7	-8.7	£8.07	-1.1	12.9
TOTAL BREADED	233,644	242,070	274,287	13.3	26.0	30,088	30,863	33,546	8.7	-7.9	£8.18	4.2	36.7
TOTAL BATTER	169,454	176,262	203,231	15.3	22.8	24,090	24,036	26,075	8.5	-14.8	£7.79	6.3	44.1
TOTAL FINGERS	165,497	173,067	199,294	15.2	31.6	34,472	34,821	37,274	7.0	4.8	£5.35	7.6	25.5
TOTAL MEALS	208,017	200,625	190,818	-4.9	-7.7	33,590	32,383	30,090	-7.1	-14.2	£6.34	2.4	7.6
TOTAL SAUCE	207,045	191,316	186,822	-2.3	-19.3	24,743	23,301	22,811	-2.1	-19.8	£8.19	-0.2	0.9
TOTAL CAKES	130,888	125,725	129,623	3.1	20.4	20,192	19,087	19,526	2.3	6.1	£6.64	0.8	13.5
TOTAL SUSHI	95,566	105,729	93,997	-11.1	9.6	5,700	6,315	5,800	-8.2	-6.2	£16.21	-3.2	16.8
TOTAL DUSTED	75,694	68,638	71,369	4.0	-10.4	7,516	6,591	6,871	4.3	-20.9	£10.39	-0.3	13.3

Nielsen Scantrack YE 13.06.20 (*10yr GB)

Total seafood sector and segment performance to 2020



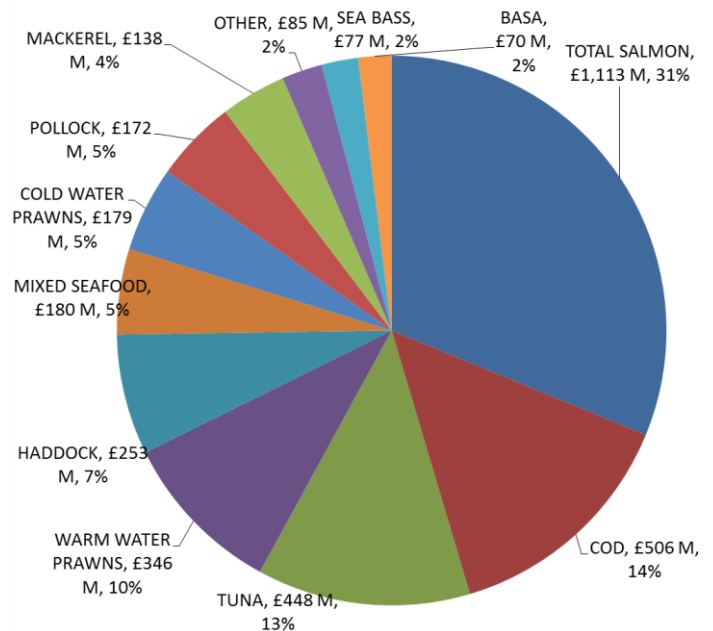
Nielsen Scantrack YE 13.06.20 (*10yr GB)

Total species performance

Salmon continues to dominate seafood but lost share, with a 31% (-2.0pp) value share of the top species. Still worth double the value of cod, salmon was worth £1.113bn, (+3.8%) with 66,062 tonnes (+5.0%) in the 52wks to 13.6.20. Cod value share also fell, but remains the second most popular UK species with 14% (-1.0pp). Cold warm water prawns, and mixed seafood were the main species growing share; with mixed seafood overtaking cold water prawns to move into 6th place.

By volume, panic buying of cupboard staples has put tuna back on top as the UK's most popular seafood, pushing salmon into second place. The top three species, tuna, salmon, and cod each take a similar share at 19%, 18% and 17% respectively.

Top species value share of UK total seafood (2020)



Nielsen Scantrack YE 13.06.20

Total seafood species performance to 2020

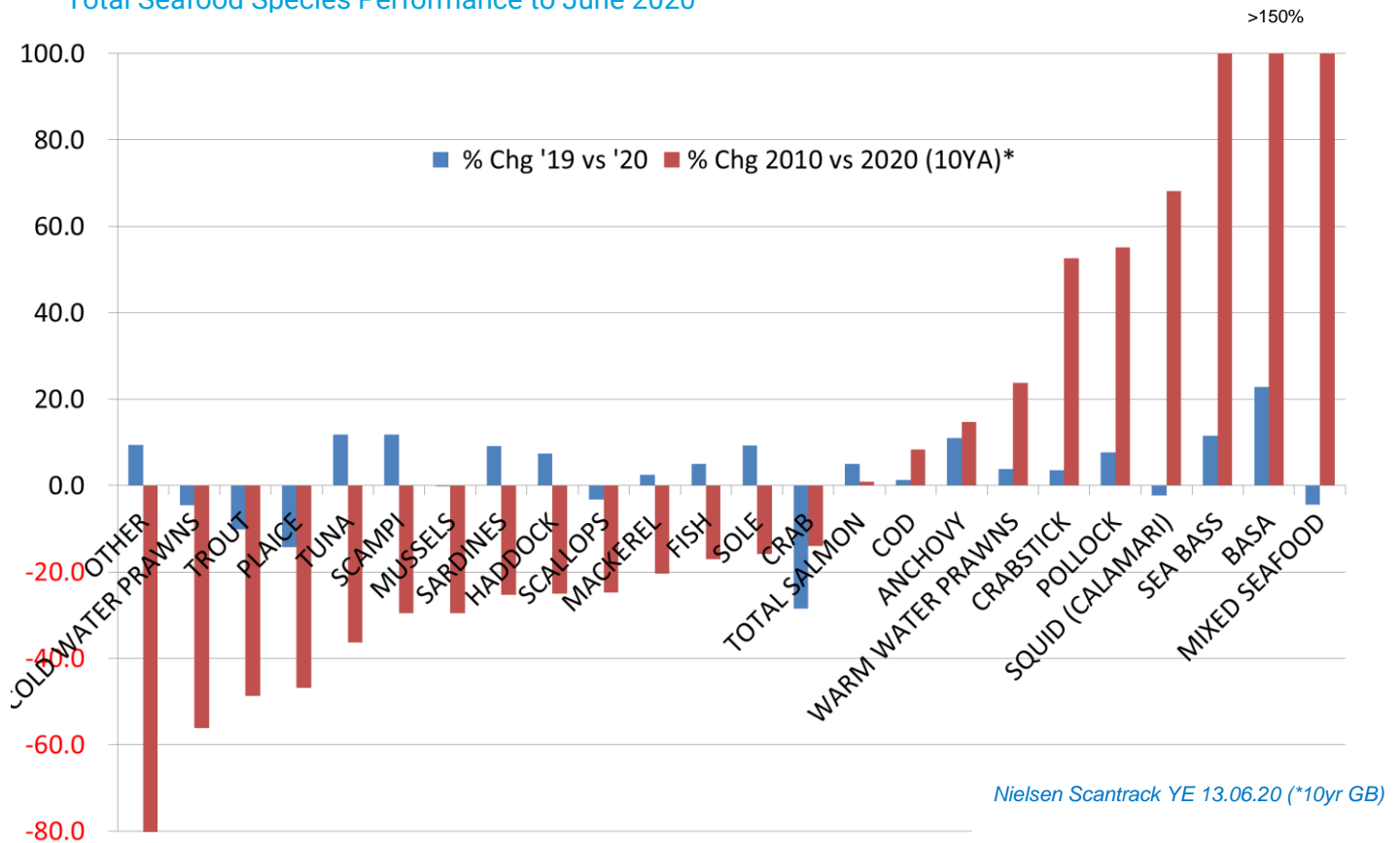
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FISH	3,810,107	3,824,874	4,001,435	4.6	17.2	395,573	392,615	412,267	5.0	-17.1	£9.71	-0.4	41.5
TOTAL SALMON	1,059,876	1,072,619	1,113,091	3.8	44.0	61,135	62,890	66,062	5.0	0.8	£16.85	-1.2	42.8
COD	489,298	487,239	506,490	4.0	29.4	62,756	60,324	61,119	1.3	8.4	£8.29	2.6	19.5
TUNA	404,463	409,525	448,028	9.4	0.5	62,590	60,699	67,888	11.8	-36.3	£6.60	-2.2	57.8
WARM WATER PRAWNS	322,597	333,296	346,452	4.0	50.0	22,448	23,747	24,649	3.8	23.7	£14.06	0.1	21.2
HADDOCK	253,195	240,262	253,103	5.3	-10.5	27,228	24,850	26,687	7.4	-25.1	£9.48	-1.9	19.4
MIXED SEAFOOD	176,962	186,240	179,508	-3.6	625.5	19,274	20,111	19,206	-4.5	513.4	£9.35	0.9	18.3
COLD WATER PRAWNS	187,535	181,514	179,485	-1.1	-27.3	15,285	14,616	13,955	-4.5	-56.1	£12.86	3.6	65.6
POLLOCK	130,035	148,199	171,739	15.9	71.8	28,799	31,377	33,780	7.7	55.1	£5.08	7.6	10.8
MACKEREL	129,607	131,406	137,975	5.0	9.8	17,833	17,629	18,059	2.4	-20.4	£7.64	2.5	37.8
OTHER	82,741	79,297	85,037	7.2	-79.1	15,909	15,564	17,018	9.3	-83.0	£5.00	-1.9	23.0
SEA BASS	67,499	67,382	76,618	13.7	177.1	4,141	4,231	4,720	11.6	156.9	£16.23	1.9	7.9
BASA	62,945	58,626	69,750	19.0	369.3	8,109	7,360	9,042	22.9	337.8	£7.71	-3.2	7.2
SCAMPI	57,403	57,719	65,209	13.0	-8.3	5,431	5,279	5,899	11.7	-29.6	£11.05	1.1	30.3
SARDINES	39,788	40,457	44,150	9.1	-0.7	8,351	8,458	9,229	9.1	-25.4	£4.78	0.0	33.2
CRABSTICK	35,586	38,624	39,881	3.3	59.8	8,401	9,788	10,139	3.6	52.6	£3.93	-0.3	4.6
TROUT	39,145	35,391	33,065	-6.6	-15.0	2,956	2,445	2,196	-10.2	-48.8	£15.06	4.0	65.9
SOLE	30,215	29,352	30,686	4.5	-17.2	2,462	2,350	2,566	9.2	-15.8	£11.96	-4.3	-1.6
MUSSELS	26,537	24,118	24,373	1.1	-16.4	4,723	4,237	4,236	-0.0	-29.6	£5.75	1.1	18.7
CRAB	28,195	26,996	23,003	-14.8	46.2	1,447	1,403	1,003	-28.5	-14.0	£22.94	19.2	70.1
PLAICE	26,725	19,772	18,297	-7.5	-37.6	2,702	1,824	1,563	-14.3	-46.8	£11.70	7.9	17.4
SCALLOPS	16,649	17,546	17,202	-2.0	2.4	780	737	713	-3.2	-24.8	£24.11	1.3	36.3
SQUID (CALAMARI)	15,041	15,058	15,142	0.6	106.1	1,141	1,386	1,354	-2.3	68.2	£11.19	3.0	22.6

Nielsen Scantrack YE 13.06.20 (*10yr GB)

In the 52wks to 13th June 2020, tuna, pollock (Alaskan pollack – a key ingredient in cheaper coated products) seabass, basa and scampi were the main species in full growth and showed some of the highest volume growth. Notably haddock returned to growth after a long period of decline, boosted by sales of coated products.

Over the long term (ten years to 13th June 2020) five of the top ten species (salmon, cod, warm water prawns, mixed seafood and pollock) were in full growth. Volume growth of over 500% was seen from ‘mixed seafood’ (attractive to shoppers due to convenience and price); whilst farmed species including basa, seabass, and seabream (traditional whitefish alternatives) grew volume by up to 337%.

Total Seafood Species Performance to June 2020



Cold water prawns continue in long term volume decline, along with 'other' which captures the cheaper seafood products where species is not mentioned such as 'fish' pie or 'fish' fingers. The decline of 'other' seafood driven by seafood shopper' focus on quality but also health driven to front of mind by the recent food scandals and now COVID-19.

Despite the typical seafood shopper prioritising taste/quality above price, significant inflation (41%) will undoubtedly impact on sales. Cold water prawns have experienced some of the highest inflation over the past 10 years and a significant fall in sales. However, there are many species such as salmon, cod, and warm water prawns, where consumption has continued to increase despite double digit price increases.

As recession begins to bite in 2021, expect taste/quality to become even more important for seafood products, to tip shoppers value for money expectations in favour of seafood to prevent trading down to cheaper proteins.

Total seafood vs other proteins

In 2017 the total seafood category became the highest value protein category, pushing total red meat into second place. In 2020, the GB value of total seafood was worth £129m more than total red meat and £801m more than poultry, its nearest competitors. The value of most protein categories grew last year as inflation eased. In 2019 the number of unit sales fell across protein categories, this has reversed in 2020 with units in growth across all protein categories with the exception of lamb and chilled seafood. Similarly, price per unit fell across all protein categories in 2019, but has increased across some categories including meat and poultry and frozen seafood in 2020.

The seafood shopper

In 2020, the number of shoppers purchasing seafood increased slightly. Total seafood penetration (i.e. the % of shoppers who purchase seafood) is very high, at 96.6%. Compared with the previous year, more shoppers are shopping more often, and spending more on larger baskets. Shoppers bought an average 0.5kg of seafood per trip - spending on average £4.18 per trip; and bought seafood 29.5 times per year, spending a total of £123.57 on 14.2 kg/yr.

Nielsen demographics still define the total seafood shopper as predominantly affluent AB/C1, older (age 45-64), typically in two person households without children present. Where children are present they are typically aged 5-10 yrs.

Seafood is becoming a younger and more affluent purchase. Compared to a year ago the share of seafood consumed by the oldest demographic (over 65 yrs.) has decreased whilst 45-64 age groups increased. Likewise the share of seafood purchased by AB/C1 shoppers increased whilst

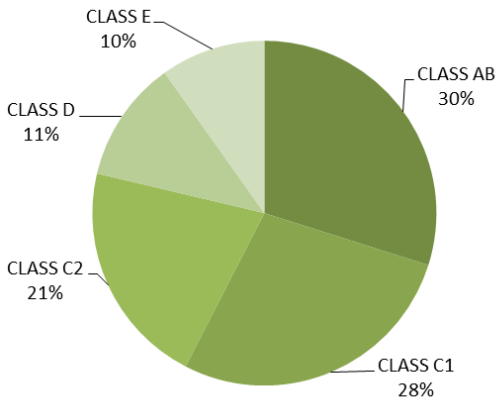
2020 seafood demographics % shoppers (by volume)

	TOTAL FISH	AMBIENT	CHILLED	FROZEN
CLASS AB	29.9	28.8	33.8	26.3
CLASS C1	27.7	28.0	27.8	27.5
CLASS C2	21.1	21.7	19.1	23.0
CLASS D	11.5	12.2	9.8	12.8
CLASS E	9.9	9.3	9.5	10.5
SIZE 1 MEMBER	23.6	22.3	27.7	20.1
SIZE 2 MEMBERS	41.4	38.8	45.0	38.9
SIZE 3.4 MEMBERS	28.3	31.0	23.0	32.3
SIZE > 5 MEMBERS	6.7	7.9	4.3	8.7
<35 YEARS	12.0	14.6	10.1	12.5
35 TO 44 YEARS	16.1	17.9	13.7	17.7
45 TO 64 YEARS	37.5	38.9	35.8	38.5
65+ YEARS	34.4	28.6	40.4	31.4
CHILDREN YES	23.6	27.1	17.5	28.2
CHILDREN NO	76.4	72.9	82.5	71.8
CHILD 0 TO 4 YEARS	23.0	22.0	22.7	23.7
CHILD 5 TO 10 YEARS	40.7	40.1	41.4	40.6
CHILD 11 TO 15 YEARS	36.4	37.9	35.9	35.8
PRE FAMILY	5.8	7.1	5.8	4.9
NEW FAMILY	4.7	5.1	3.7	5.4
MATURING FAMILIES	12.3	14.1	8.9	15.0
ESTABLISHED FAMILIES	9.0	10.5	6.7	10.6
POST FAMILIES	17.1	18.2	17.1	16.4
OLDER COUPLES	34.8	30.8	38.0	33.7
OLDER SINGLES	16.4	14.2	19.8	13.9

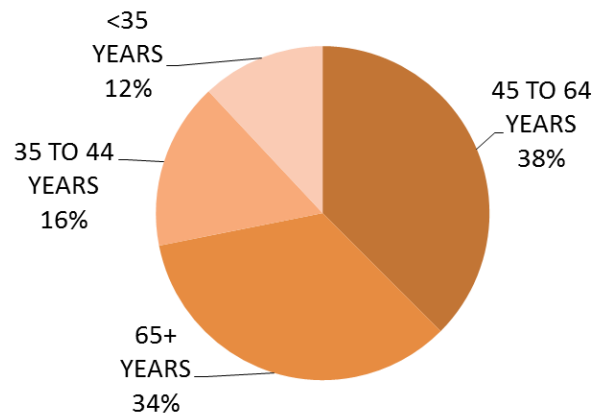
Nielsen Homescan 52 wks. ending 13th June2020

class E declined. More seafood is also being purchased by larger (>5) households as the core demographic shrinks. Fewer families with children are buying seafood, with a marked fall in consumption from families with children in the 0 to 4 years age group, balanced by an increase in families with children aged 11 to 15.

Household size - share of retail seafood 2020 (volume)



Age - share of retail seafood 2020 (volume)



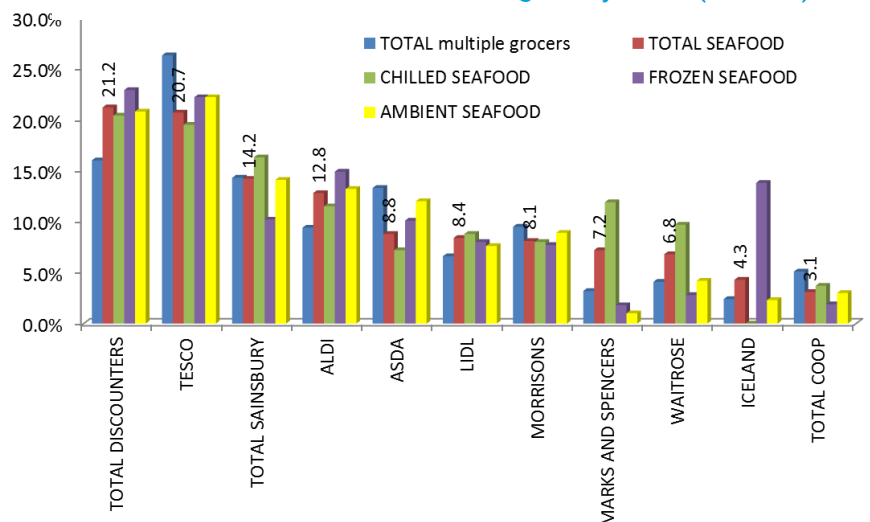
Nielsen Scantrack YE 13.06.20

Where are shoppers purchasing seafood?

The percentage of pre-packaged seafood continues to grow strongly as it has done in previous years, with shoppers reporting being intimidated by having to ask the fishmonger, and wanting to be in and out of store as quickly as possible. Some retailers have already made the decision to remove seafood counters from store, at the current rate of change it is likely that others may soon follow. In June 2020, 97% of seafood was sold prepack, rather than from a fish counter. This puts more emphasis on the need to provide prepack products which meet shopper requirements around freshness, minimising handling/preparation and ease of cook.

This year, for the first time, Tesco has been displaced by the combined discounters Aldi and Lidl as the largest GB seafood retailers. Over the past ten years, discounters have substantially grown total seafood share. Aldi has seen the largest growth from a 1.5% share in 2008 to 12.8% in 2020 (data includes recent Nielsen adjustment to improve discounter product capture); the quality and 'Britishness' messages continuing to resonate with shoppers. Premium quality orientated retailers like M&S, Waitrose and the Co-operative have also grown share as shoppers hunt for taste and freshness. These retailers also overtrade in seafood, which means their share of seafood sales value is higher than their share of the FMCG market overall.

Grocer share of seafood and total grocery 2020 (volume)



Nielsen Homescan YE 13.06.20

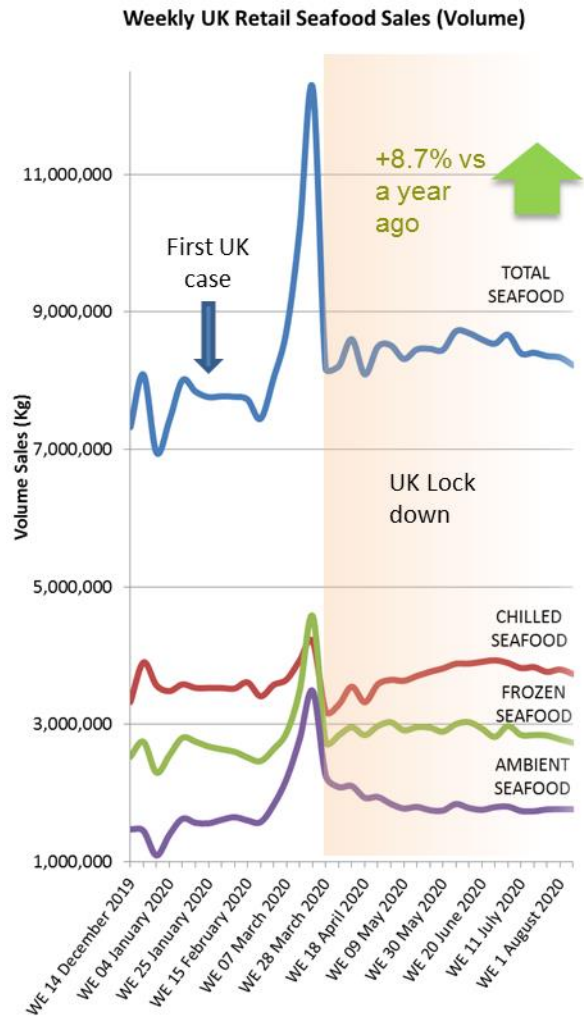
The effect of COVID-19 and the future of retail seafood

The COVID-19 pandemic has had a huge impact on the UK grocery, with retail gaining additional sales from panic buying, home working, school closures and the subsequent restrictions on foodservice. Seafood also benefited with volume sales week by week out performing last year.

Panic buying in March 2020 lasted 4 weeks, at its peak, total seafood weekly volume sales grew by 58%, driven by strong demand in all sectors. Frozen seafood consumption briefly outstripped chilled for the first time since 2005 and the struggling ambient (canned and shelf stable), saw a +117% boost as shoppers prioritised cupboard and freezer staples. Subsequently volume sales have fallen but total seafood weekly volume sales remain up +8.7% on last year (Aug 2020).

Key insight:

- Sectors are starting to return to ‘normal’: Volume is falling across all sectors with chilled being the most resilient and ambient almost back to last year’s level. However, sales across all sectors still remain higher than last year: chilled +8.9%, frozen 12.1%, ambient +3.6%
- Natural (+16.6%), breaded (+20.5%) and dusted (+13.8%) are the key segments in growth whilst squid (+75%), basa (+44%) and scampi (+44%) are the top performing species in volume growth vs the same week last year.



Nielsen Scantrack

Key Facts:

- COVID-19 provided a significant boost to seafood sales; home working, school closures and the subsequent restrictions on foodservice have helped weekly seafood sales remain 8.7% higher than last year.
- Compared with last year, more shoppers are buying seafood, shopping more often, and spending more on larger baskets. Seafood is also becoming a younger and more affluent purchase with fewer families buying seafood. In addition, there is a shift away from the core two person household towards larger (>5 person) households.
- The total seafood category has returned to full growth. UK retail sales were worth £4.0bn (+4.6%), with a volume of 412,267 tonnes (+5.0%) and an average price of £9.71/kg (-0.4%) (Nielsen Scantrack: 52 weeks to 13.6.20).
- The chilled seafood sector remains the largest and the only sector in recent long term volume growth. Although not initially benefiting from panic buying as much as frozen and ambient, it is proving to be more resilient as sales slide back towards pre COVID levels. However, all segment volume sales remain higher than the same week last year (chilled +8.9%, frozen 12.1%, ambient +3.6%)
- This year, home working and school closures boosted coated segment seafood sales. Over the short term (52 wks. to 13th June 2020), breaded (+13.3%), battered (+15.3%) and fingers (+15.2%) showed the strongest growth. Over the long term (ten years to June 2020) only the natural, fingers and cake segments were in full growth.
- Salmon continues to dominate total seafood by value but panic buying of cupboard staples has put tuna back on top as the UK' most popular seafood (by volume) pushing salmon into second place.
- In the 52wks to 13th June 2020, tuna, pollock (Alaskan pollack- a key ingredient in cheaper coated products) seabass, basa and scampi were the main species in full growth and showed some of the highest volume growth. Notably haddock also returned to growth, boosted by sales of coated products.

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
 - Homescan – GB (including discounters) consumer panel of 15,000 households excludes seafood sandwiches

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the support it needs to thrive.

The Seafish logo features the word "seafish" in a white, lowercase, sans-serif font. Above the letter "i" in "fish", there is a stylized graphic of a fish's tail or a cluster of small white diamonds.