

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



Seafood in multiple retail (2022 update)

A market insight analysis (20m read)

September 2022 Richard Watson

Key Facts/Executive summary:

- The seafood category returns to strong decline. UK retail sales were worth £4.08bn (-4.5%), with a volume of 407,352 tonnes (-4.4%) and an average price of £10.02/kg (-0.1%) (Nielsen Scantrack: 52 weeks to 16.06.22).
- By the end of 2021, the reversion back to pre-COVID-19 trading patterns was complete, with only chilled seafood sales in growth and both frozen and ambient seafood sectors in decline.
- By June 2022, the 10% boost to seafood sales from COVID-19 had diminished, as seafood returned to pre COVID-19 levels. With the UK facing an unprecedented economic crisis, and with the impact on personal finances predicted to be worse than 2007/8 it's possible that retail seafood consumption could fall by further 30-35% over the next 10 years.
- The number of shoppers purchasing seafood fell strongly compared with last year. Fewer shoppers are shopping less often and spending more on significantly smaller baskets. Shoppers bought an average 0.5kg of seafood per trip, spending on average £4.82 per trip; and bought seafood 29 times per year, spending a total of £140.30 on 14.8 kg/yr.
- Compared to 2016, there has been a significant shift in seafood demographics. The share of seafood consumed by the oldest group over 65 yrs. (+38%) and 35-45 yrs. (+53%) has increased significantly, with a corresponding fall in the younger age groups. Likewise, the high average price of seafood is forcing the least affluent E-demographic to trade out of seafood, as share fell by -35%; with corresponding growth in D-demographic and ABC1 shoppers. Seafood is also being bought by larger households, >5 members up by +71.6%
- In the 52 wks. to June 2022, all seafood sectors were in full decline except for ambient which only posted positive volume growth as a result of an unusually large drop in volume last year.
- Prepared seafood was the only segment to show significant volume sector growth, up 2.0pp. Likely to be driven by consumers turning to dining in, as concerns over personal finances and the economy build limiting foodservice visits. Pressure on personal finances impacted on nearly all species sales. Only tuna grew volume sales as consumers turned to sandwiches to save money, as well as crabsticks the cheapest snacking seafood product.

Historic retail seafood 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. Up until 2020, chilled seafood was the only sector in consistent growth with frozen and ambient either flat or in decline. Prior to the arrival of COVID-19 volume sales had declined by -25% in the previous 10 years, equating to around £5.5bn lost out of retail seafood sales. This however is a worst case as discounters have performed strongly over the period, but UK and discounter data has only been available to Seafish for the past few years.

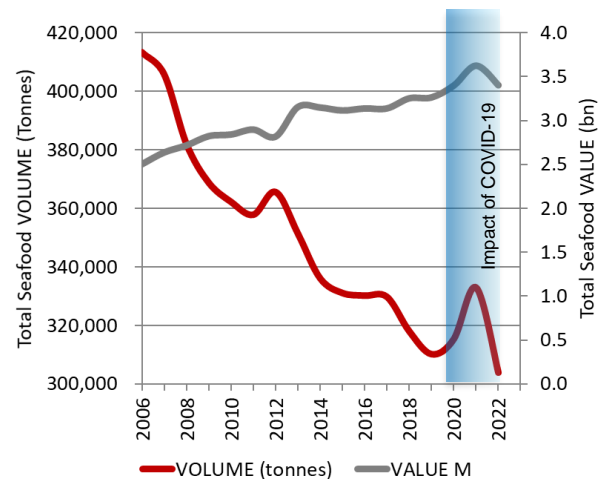
Arriving in early 2020, the COVID-19 pandemic has had a huge impact on the performance and priorities of UK retail. More in-home meal occasions gave a significant boost to seafood sales, this along with the subsequent closure of many foodservice outlets boosted seafood sales over 10% higher than before COVID.

Through 2020, frozen and ambient seafood performed strongly; uncertainty over the evolving pandemic meant shoppers kept cupboards and freezers full. Frozen natural, prepared, and frozen coated seafood such as breaded, battered, cakes and fingers grew strongly. As a result, most frozen species saw strong volume growth, especially species popular in coated products such as haddock and Alaskan pollack. Established farmed seafood species such as salmon, warm water prawn and basa and seabass also continued to perform strongly. Unusually, species also associated with foodservice like lobster, scampi showed some of the highest annual growth, likely driven by foodservice closures and consumers dining in.

By mid-2021, seafood sales remained elevated, but the market showed clear signs of returning to pre COVID-19 trading patterns. Sales of frozen seafood had slowed, and ambient seafood returned to decline, with chilled seafood once more returning to drive category growth. By the end of 2021 retail seafood volume sales had returned to decline, the reversion to pre COVID-19 trading patterns complete, with only chilled seafood sales in growth and both frozen and ambient seafood sectors in decline.

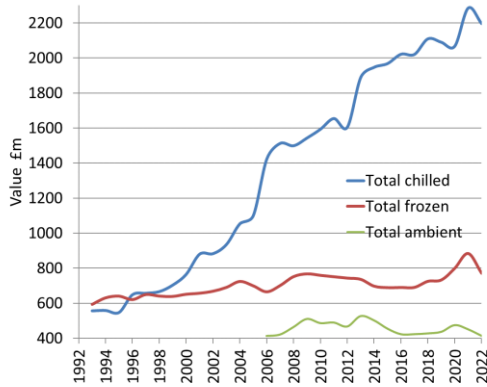
By June 2022, UK retail seafood consumption had fallen to below 2019 pre COVID-19 levels. With the UK facing an unprecedented economic crisis and the impact on personal finances predicted to be worse than 2007/8 when retail consumption fell by 20-30%, it is possible that retail seafood consumption could fall by around 30-35% over the next 10 years.

Long Term Retail Total Seafood Consumption Trend (GB excluding discounters)



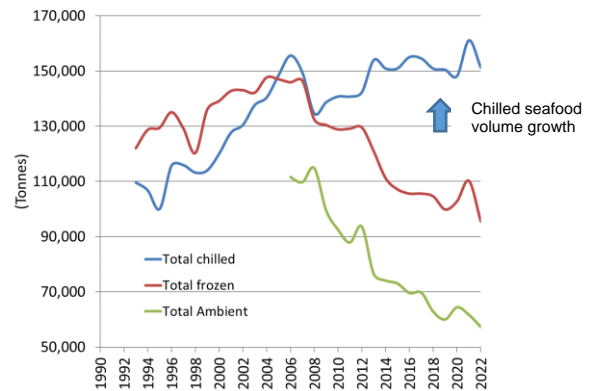
Nielsen Scantrack YE 18.06.22

Long Term GB Seafood Sector Value Trends.



Nielsen GB Scantrack/TNS

Long Term GB Seafood Sector Volume Trends.



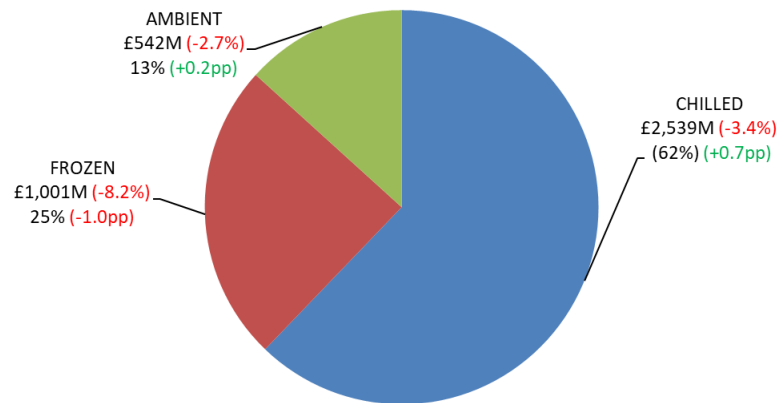
Current UK seafood retail performance

The consumption boost to seafood from COVID-19 is over, with retail seafood value up 2.6% and volume down -0.2% vs pre COVID-19.

In the 52 wks. to June 2022, the total seafood category continued in strong decline, driven by shrinking meal occasions and growing pressure from high inflation and the Ukraine crisis.

Seafood sales were worth £4.08bn (-4.5%), with a volume of 407,352 tonnes (-4.4%). With an average price of £10.02/kg (-0.1%) The recent price increases affecting other proteins is yet to hit the category. However, years of persistent heavy inflation still makes seafood an expensive choice compared to other proteins.

UK Seafood Sector Share by Value 2022



Nielsen Scantrack YE 18.06.22

In the 52 wks. to June 2022, all seafood sectors were in full decline except for ambient which only posted positive volume growth because of an unusually large drop in volume last year.

- Chilled showed significant decline worth £2,538m (-3.4%) with a volume of 184,211 tonnes (-5.7%) and average price of £13.78/kg (+2.5%).
- Frozen showed the heaviest decline in volume and value worth £1,109m (-8.2%) with a volume of 133,424 tonnes (-9.4%) and average price of £7.50/kg (+1.3%).
- Ambient seafood showed significant price drops, growing volume sales, worth £542m (-2.7%) with a volume of 89,717 tonnes (+7.6%) and average price at £6.05/kg (-9.6%).

Over the long term, 10 years to June 2022 (GB, excluding discounters), seafood remains in strong price driven growth:

- Total seafood value grew by +12.8%, whilst the amount of seafood fell by -15.4%, average price up +33.3%.
- The value of the chilled seafood sector grew by +27.5%, volume sales up +4.4%, average price up +22.0%.
- The value of the frozen seafood sector fell by -8.2%, volume sales down by -25.7%, average price up +35.5%.
- The value of the ambient seafood sector fell by -18.7%, volume sales down by -33.3%, average price up +26.2%.

Total seafood segment performance

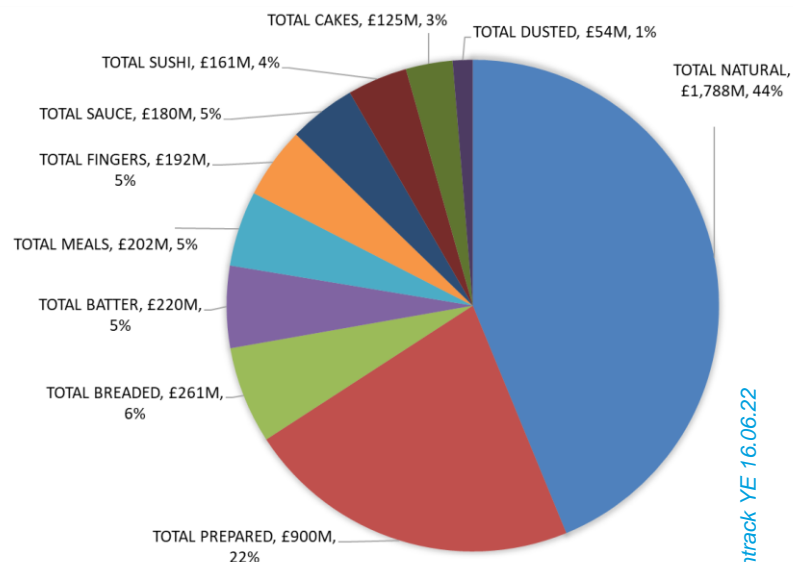
Total seafood can be split into 10 segments (by product type). The total natural segment (no additional ingredients) continues to take the largest share, by both value 44% (-1pp) percentage point change), and volume 30% (+0.0pp), of the total UK seafood category. Total natural, along with the total prepared 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.

Prepared seafood was the only segment to show significant volume sector growth, up 2.0pp. Likely to be driven by consumers turning to dining in as concerns over personal finances and the economy build limiting foodservice visits.

By mid-2022, consumers had settled into a hybrid way of working, living with new emerging COVID-19 variants. Stretched finances are impacting on the lower demographics the hardest which seen in the drop in consumption of cakes and breaded seafood (-1pp respectively).

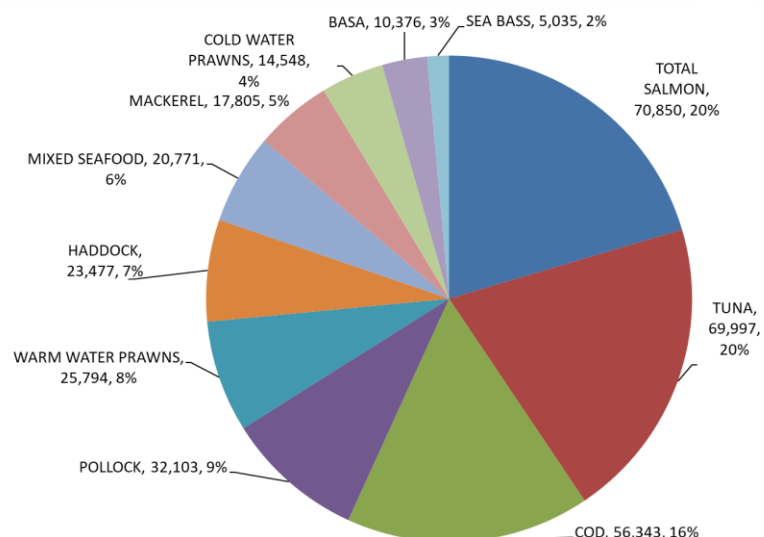
Over the long term (10 years to June 2022) natural, prepared and sushi segments showed the highest volume growth. Whilst sauce, meals and breaded showed the largest consumption decline. Despite a double-digit boost from COVID, breaded seafood sales remain significantly lower (-17.9%) than 10 years ago.

Segment Value Share of UK Total Seafood 2022



Nielsen Scantrack YE 16.06.22

Segment Volume Share of UK Total Seafood (tonnes) 2020

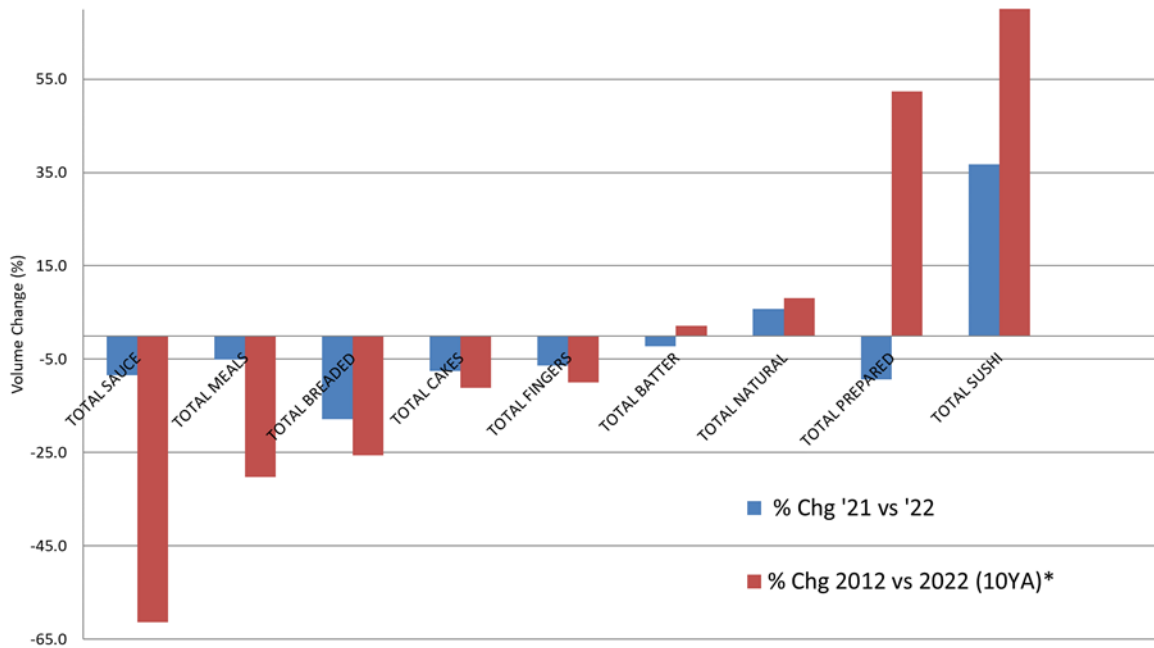


UK total seafood sector and segment performance to 2022

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2019 52wks to 18.6.20	2020 52wks to 18.6.21	2021 52wks to 18.6.22	% Chg '21 vs '22	% Chg 2012 vs 2022 (10YA)*	2019 52wks to 18.6.20	2020 52wks to 18.6.21	2021 52wks to 18.6.22	% Chg '21 vs '22	% Chg 2012 vs 2022 (10YA)*	Avg Price 2022 (£)	% Chg '21 vs '22	% Chg 2012 vs 2022 (10YA)*
TOTAL SEAFOOD	3,966,104	4,274,935	4,082,195	-4.5	12.8	400,777	426,054	407,352	-4.4	-15.4	£10.02	-0.1	33.3
FRESH	2,359,692	2,626,994	2,538,781	-3.4	27.5	176,551	195,380	184,211	-5.7	4.4	£13.78	2.5	22.0
FROZEN	1,007,758	1,090,256	1,001,049	-8.2	0.7	137,253	147,259	133,424	-9.4	-25.7	£7.50	1.3	35.5
AMBIENT	598,654	557,686	542,364	-2.7	-18.7	86,973	83,415	89,717	7.6	-33.3	£6.05	-9.6	fff
TOTAL NATURAL	1,736,978	1,939,054	1,787,993	-7.8	36.5	115,453	134,035	121,607	5.8	8.1	£14.70	1.6	26.2
TOTAL PREPARED	896,318	908,434	899,576	-1.0	26.3	107,346	107,520	113,777	-9.3	52.4	£7.91	-6.4	-17.1
TOTAL BREADED	275,214	303,280	260,662	-14.1	3.4	32,862	35,653	29,276	-17.9	-25.7	£8.90	4.7	39.2
TOTAL BATTER	193,768	222,432	220,026	-1.1	52.0	23,810	27,020	26,402	-2.3	2.2	£8.33	1.2	48.8
TOTAL MEALS	193,500	197,130	202,005	2.5	-6.1	30,420	29,922	28,406	-5.1	-30.2	£7.11	7.9	41.8
TOTAL FINGERS	197,989	204,842	191,685	-6.4	21.0	37,329	37,082	34,699	-6.4	-10.0	£5.52	0.0	34.5
TOTAL SAUCE	184,276	188,147	180,417	-4.1	-32.7	22,394	22,570	20,680	-8.4	-61.4	£8.72	4.7	74.4
TOTAL SUSHI	96,377	115,476	160,942	39.4	151.1	6,171	7,084	9,686	36.7	83.9	£16.62	1.9	36.5
TOTAL CAKES	126,088	132,969	125,371	-5.7	-2.2	18,866	19,431	17,965	-7.5	-11.1	£6.98	2.0	10.0
TOTAL DUSTED	65,594	63,172	53,519	-15.3	N/A	6,125	5,738	4,855	-15.4	N/A	£11.02	0.1	NA

Nielsen Scantrack YE 18.06.22 (*10yr GB)

Seafood segment volume performance to 2022



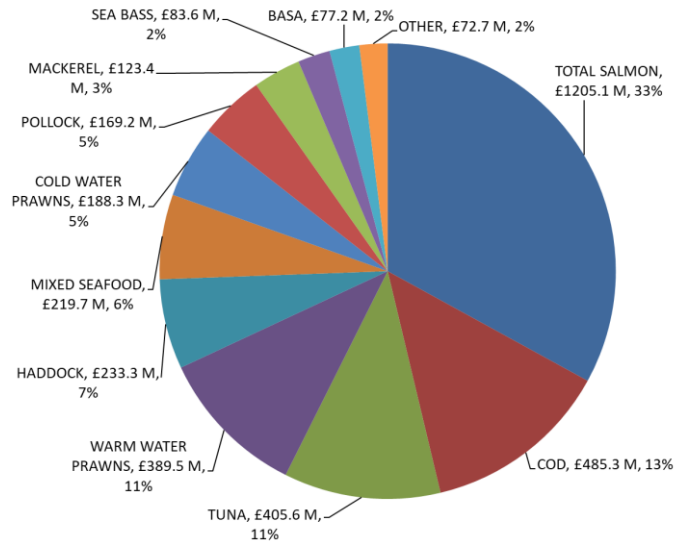
Nielsen Scantrack YE 18.06.22 (*10yr GB)

Total species performance

Despite shoppers' recent interest in coated cod and haddock, salmon continues to dominate seafood sales and grow share, with a 33% (+1.0pp) value share of the top species. Worth over double the value of cod, salmon sales stood at £1.205bn, (-1.5%) and 70,850 tonnes (-3.8%) in the 52wks to 18.06.22. Cod value share fell 1pp to 13% as the second most valuable UK species.

The top 5 species continue to make up most of the seafood we eat. Salmon retains the top spot by both volume and value.

Top 12 species value share of UK total seafood (2022)



Nielsen Scantrack YE 18.06.22

Position	Top 5 species by Value		Top 5 species by Volume (t)	
1	SALMON	£1,205 M	SALMON	70,850
2	COD	£485 M	TUNA	69,997
3	TUNA	£406 M	COD	56,343
4	WARM WATER PRAWNS	£390 M	WARM WATER PRAWNS	25,794
5	HADDOCK	£233 M	HADDOCK	23,477

Total seafood species performance to 2022

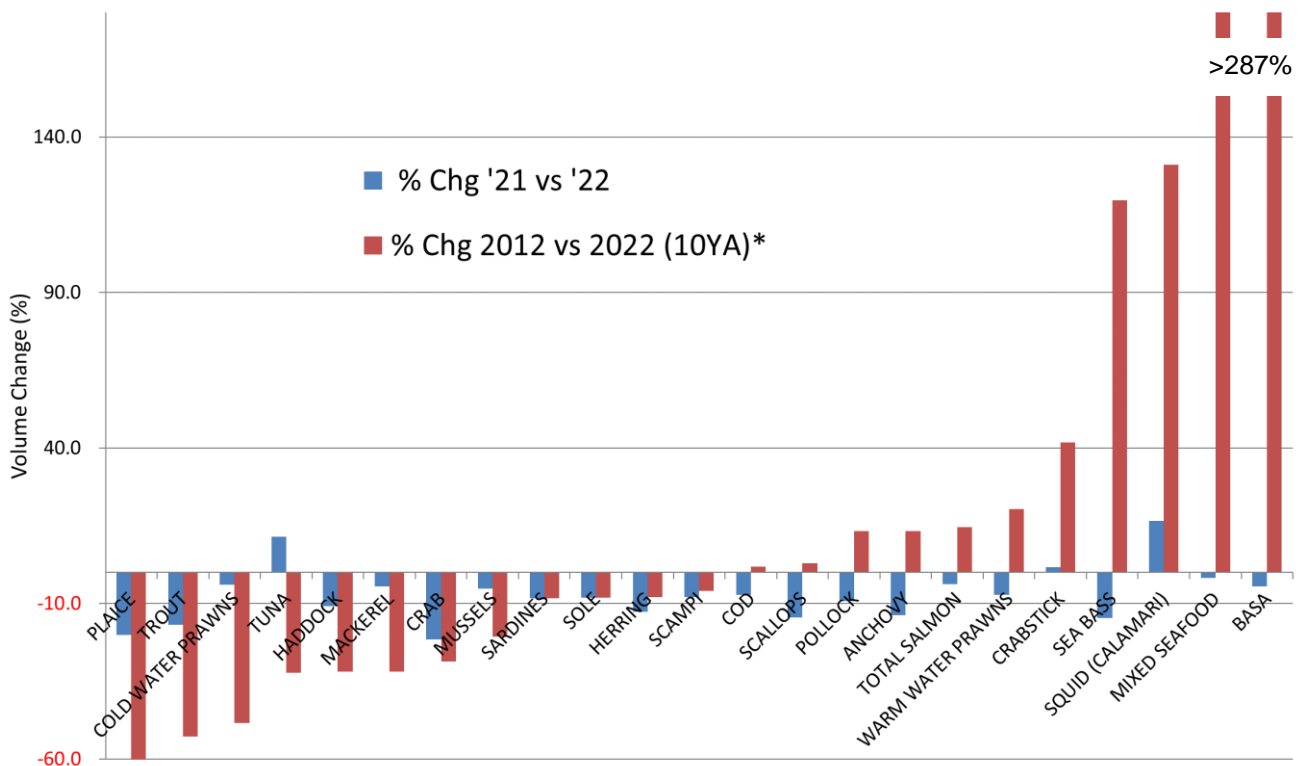
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TOTAL SALMON	1,107,326	1,223,780	1,205,097	-1.5	40.7	64,443	73,639	70,850	-3.8	14.5	£17.01	2.4	22.8
COD	496,135	525,598	485,312	-7.7	22.1	57,687	60,779	56,343	-7.3	1.8	£8.61	-0.4	20.0
TUNA	445,830	418,962	405,600	-3.2	-14.5	65,021	62,844	69,997	11.4	-32.2	£5.79	-13.1	26.2
WARM WATER PRAWNS	368,576	408,798	389,527	-4.7	47.9	26,042	27,814	25,794	-7.3	20.4	£15.10	2.8	22.8
HADDOCK	242,909	260,132	233,339	-10.3	-18.8	24,802	26,360	23,477	-10.9	-31.9	£9.94	0.7	19.1
MIXED SEAFOOD	186,115	205,355	219,686	7.0	413.0	20,065	21,135	20,771	-1.7	286.8	£10.58	8.9	32.6
COLD WATER PRAWNS	161,629	189,136	188,280	-0.5	-21.2	13,169	15,162	14,548	-4.1	-48.5	£12.94	3.8	52.8
POLLOCK	175,442	184,355	169,233	-8.2	29.4	34,384	35,368	32,103	-9.2	13.2	£5.27	1.1	14.3
MACKEREL	132,687	129,765	123,382	-4.9	-16.1	16,807	18,647	17,805	-4.5	-31.8	£6.93	-0.4	23.2
SEA BASS	76,107	95,104	83,585	-12.1	163.9	4,608	5,895	5,035	-14.6	119.6	£16.60	2.9	20.2
BASA	68,591	84,334	77,157	-8.5	356.9	8,421	10,871	10,376	-4.6	361.0	£7.44	-4.2	-0.9
OTHER	78,511	81,782	72,734	-11.1	-85.9	17,296	16,268	12,991	-20.1	-89.2	£5.60	11.4	30.8
SCAMPI	63,797	74,527	68,341	-8.3	10.6	5,674	6,924	6,377	-7.9	-5.9	£10.72	-0.4	17.6
SARDINES	43,251	41,883	41,542	-0.8	-3.0	8,844	8,864	8,125	-8.3	-8.2	£5.11	8.2	5.6
CRABSTICK	37,851	37,391	38,019	1.7	32.1	9,537	9,505	9,654	1.6	41.8	£3.94	0.1	-6.8
TROUT	33,069	36,955	31,103	-15.8	-19.5	2,201	2,395	1,993	-16.8	-52.7	£15.60	1.1	70.4
MUSSELS	24,265	26,326	25,047	-4.9	-14.8	4,144	4,327	4,482	-5.2	-20.7	£5.59	0.4	7.3
SOLE	26,915	27,687	24,880	-10.1	-3.7	2,031	1,985	1,825	-8.1	-8.1	£13.63	-2.3	4.7
SQUID (CALAMARI)	17,918	22,588	23,629	4.6	126.8	1,339	1,784	2,080	16.6	131.0	£11.36	-10.3	-1.8
CRAB	21,426	25,206	20,149	-20.1	19.0	918	919	721	-21.5	-28.6	£27.94	1.9	66.8
SCALLOPS	16,781	21,871	18,768	-14.2	24.0	673	882	753	-14.6	2.9	£24.91	0.5	20.4
ANCHOVY	14,768	17,976	16,445	-8.5	30.6	824	1,008	869	-13.8	13.3	£18.92	6.1	15.2
PLAICE	18,325	17,527	14,420	-17.7	-53.0	1,563	1,462	1,167	-20.2	-62.0	£12.35	3.1	23.7
HERRING	14,551	13,847	14,138	2.1	12.3	2,221	2,224	1,942	-12.7	-8.0	£7.28	16.9	21.9
SHRIMPS	10,393	13,134	11,596	-11.7	1964.6	579	750	623	-17.0	4343.1	£18.61	6.3	-53.5

*Other- cheaper unidentified whitefish Nielsen Scantrack YE 18.06.22(*10yr GB)

In the 52wks to 18th June 2022, building pressure on personal finances impacted on nearly all species sales. Only tuna grew volume sales as consumers turned to sandwiches to save money, along with crabsticks as being the cheapest sandwich and snacking seafood product. Squid was the only other popular species in growth, having the highest volume growth at +16.6%, perhaps as shoppers try to save money on eating out.

Over the long term (10 years to 18th June 2022), only salmon, cod, warm water prawns, mixed seafood and pollock and seabass were in full growth out of the top ten. Volume growth of 287% was seen from 'mixed seafood' (attractive to shoppers due to convenience, despite significant inflation); and basa (+361%) due to its relatively low average price.

Total seafood species volume performance to June 2022



Nielsen Scantrack YE 18.06.22 (*10yr GB)

What could be considered 'traditional' seafood species cold water prawns, plaice, trout, mackerel, haddock, sardines, and crab are still showing the highest long-term decline in consumption. This negative trend also appears with 'other', which captures the cheaper seafood products where species is not mentioned, such as 'fish' pie or 'fish' fingers.

Shoppers are expected to prioritise price over freshness for the foreseeable future, but freshness remains a key part of the value for money equation and trigger to purchase. The good news is that although seafood has experienced heavy inflation over the past 10 years, it has escaped the recent price increases faced by other food items.

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 2022, all protein categories were in decline; the GB value of total seafood was worth £263m (+£100m vs 2021) more than total red meat and £812m (-£78m vs 2021) more than poultry, its nearest competition. In 2022 the number of unit sales continued to fall across all protein categories including chilled and frozen seafood.

The seafood shopper

In 2022, the number of shoppers purchasing seafood fell strongly. However, total seafood penetration (i.e., the % of shoppers who purchase seafood) remains very high, at 95.6%. Compared with the previous year, fewer shoppers are shopping less often, and spending more on smaller significantly smaller baskets. Shoppers bought an average 0.5kg of seafood per trip, spending on average £4.82 per trip; and bought seafood 29 times per year, spending a total of £140.30 on 14.8 kg/yr.

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

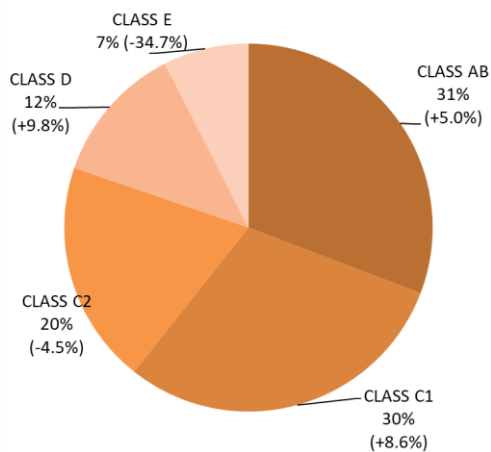
2021 seafood demographics % shoppers (by volume)

	TOTAL FISH	AMBIENT	CHILLED	FROZEN
CLASS AB	30.8	27.5	35.2	27.1
CLASS C1	29.9	30.4	30.1	29.2
CLASS C2	19.6	21.4	17.5	21.2
CLASS D	12.2	12.8	10.6	14.0
CLASS E	7.5	7.9	6.7	8.4
SIZE 1 MEMBERS	22.8	21.5	25.6	19.9
SIZE 2 MEMBERS	37.4	34.2	40.4	35.5
SIZE 3.4 MEMBERS	29.1	32.0	24.7	33.1
SIZE > 5 MEMBERS	10.7	12.3	9.4	11.5
<35 YEARS	9.9	11.2	8.6	10.7
35 TO 44 YEARS	24.6	25.5	23.8	24.9
45 TO 64 YEARS	15.9	17.8	12.9	18.4
65+ YEARS	49.6	45.5	54.7	46.0
CHILDREN YES	24.3	28.2	19.1	28.6
CHILDREN NO	75.7	71.8	80.9	71.4
CHILD 0 TO 4 YEARS	24.0	22.7	25.2	23.9
CHILD 5 TO 10 YEARS	38.5	38.7	37.5	39.2
CHILD 11 TO 15 YEARS	37.5	38.6	37.3	36.9
PRE FAMILY	5.1	5.9	5.3	4.3
NEW FAMILY	4.6	4.9	4.2	4.9
MATURING FAMILIES	12.4	14.8	9.2	15.2
ESTABLISHED FAMILIES	10.0	11.5	8.1	11.4
POST FAMILIES	15.1	16.8	14.3	15.0
OLDER COUPLES	35.7	31.0	39.1	34.3
OLDER SINGLES	17.1	15.2	19.9	14.8

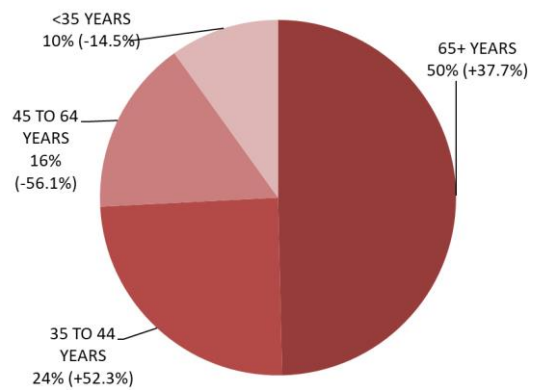
Nielsen Homescan 52 wks. ending 19th June 2021

In 2022 compared to 2016 there have been some significant shifts in total seafood demographics. The share of seafood consumed by the oldest demographics (over 65 yrs. and 35-45 groups has increased significantly, with a corresponding fall in the younger age groups. Likewise, the high average price of seafood is forcing the least affluent E-demographic to trade out of seafood as share fell by -35% vs 2016; with a corresponding growth in D-demographic and ABC1 shoppers. Seafood is also being bought by larger households, share of >5 member households grew by +71.6%.

Class share of retail seafood 2022 (change vs 2016 – volume)



Age share of retail seafood 2022 (change vs 2016 - volume)



Nielsen Homescan YE 18.06.22

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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