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

Ambient Seafood in Multiple Retail (2023)

A market insight analysis (20m read)

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Ambient Seafood in Multiple Retail (2023 Update)

Understanding the changing landscape of seafood retail sales and consumer preferences is key to running a successful seafood business. This factsheet covers the top level, trends for ambient seafood at sector, segment and species level, along with changing shopper trends, key point indicators (KPI's) and demographics in multiple retail to October 2023.

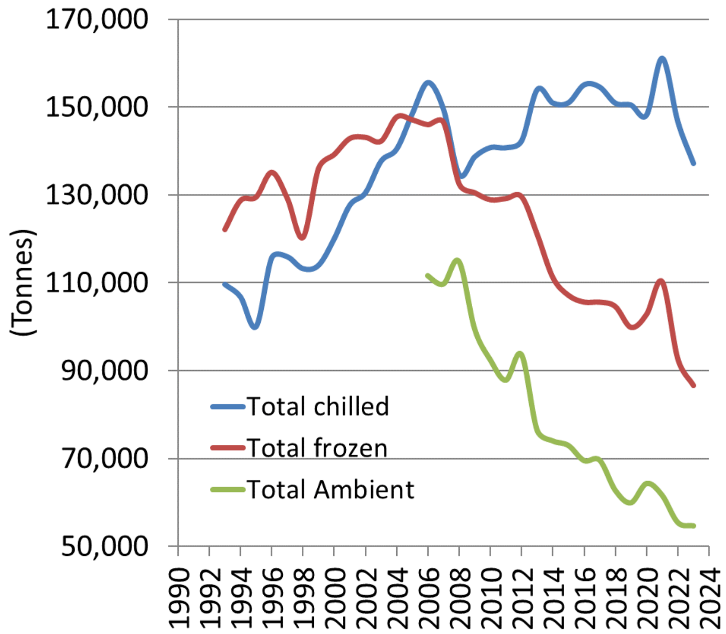
Key Facts/Executive summary:

- Ambient continues to take the smallest sector share of UK retail seafood category and is in decline. Ambient has been in general decline until 2020 when the COVID-19 pandemic briefly boosted ambient sales, and more recently following brief interest in tinned tuna driven by the cost of living crisis.
- In the 52 wks. to 7th October 2023, ambient seafood took the smallest share of value and volume, losing share to frozen seafood. In the 52 wks. to 7th October 2023, ambient seafood sales were worth £559m (+3.1%), with a volume of 132,739 tonnes (+1.8%) and an average price of £8.01/kg (+4.4%)
- Ambient seafood now has only two segments, ambient prepared which is predominantly made up of traditional tinned fish in brine, spring water or oil and ambient sauce, which contains products like mackerel in tomato sauce. It is the prepared segment (i.e., seafood with additional ingredients), which continues to take the largest value (91%), and volume (90%) share ambient seafood.
- In the 52 wks. to 7th October 2023, despite a reduction in basket size more shoppers bought ambient seafood more often. On average, ambient shoppers bought 0.41kg of ambient fish per trip spending £6.55; buying chilled seafood 9.3 times per year, spending a total of £25.20, equating to 3.9kg over the year.
- Nielsen demographics describe the ambient seafood shopper as slightly less affluent than the average seafood buyer. They are also predominantly younger with a higher proportion aged under 35 and 35 to 44.
- Compared to 2016, ambient seafood has attracted older and significantly more affluent ABC1 shoppers; perhaps driven by the recent demand for premium imported tinned seafood, a significant increase (+54%) in single member and larger person households', and where children were present, an increase in the 11-15 year old age group, and established families and older singles.

Historic retail seafood sector trends

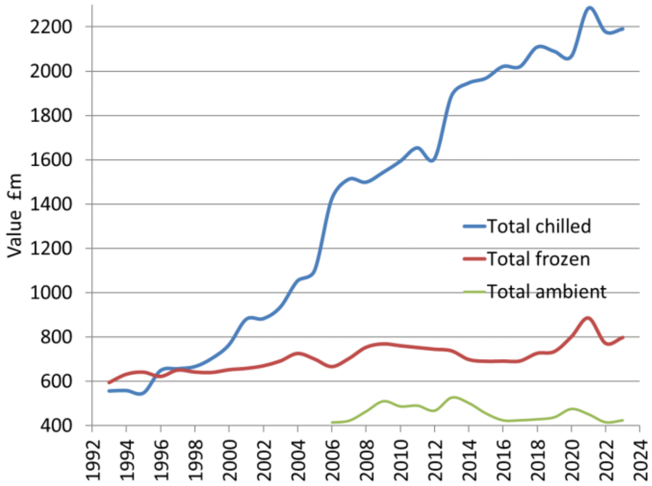
Over the long term, the seafood category has been in price driven growth, as inflation drives average price and consumption declines. Unlike the chilled sector, ambient and frozen seafood consumption has been in general decline since 2008. Frozen seafood volume sales briefly rallied in 2012 and 2018 in line with lower disposable household income. But in 2020, the COVID-19 epidemic triggered panic buying, working from home and school closures had the effect of boosting all sectors, but particularly ambient and coated frozen seafood which briefly pushed weekly volume sales +74% higher than the previous year. By mid-2021 the demand for ambient and frozen had slowed with chilled once more driving the category. In 2022, concern around inflation, the Ukraine crisis and pressure on personal finances pushed shoppers once more to strongly prioritising saving money. This had the effect of seafood shoppers trading down and out of chilled and frozen seafood into the cheapest sector, ambient, briefly pushing the sector into growth in the last few months of 2022 . In 2023, sustained pressure on finances returned all sectors to price driven growth, but by late 2023, shoppers interest in value pushed frozen back into full growth.

Long Term GB Seafood Sector Volume Trends



Nielsen GB Scantrack/TNS

Long Term GB Seafood Sector Value Trends

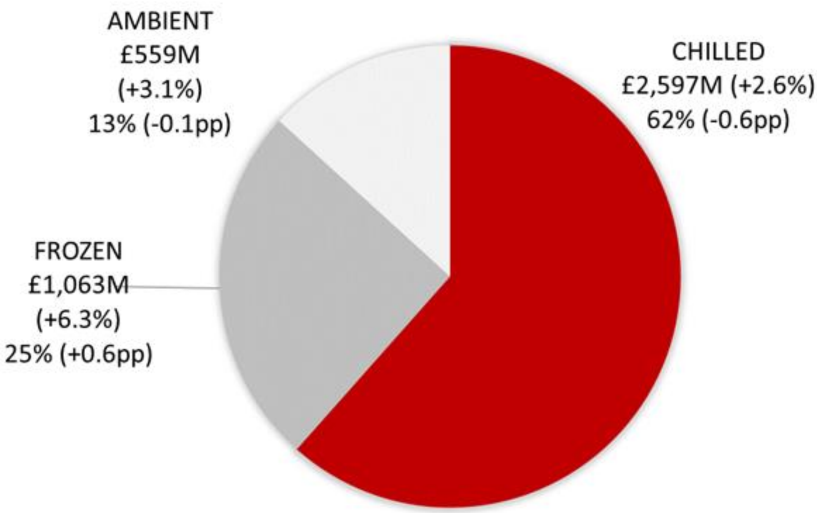


Nielsen GB Scantrack/TNS

Ambient seafood performance

Despite a brief period of growth at the end of 2022, when shoppers turned to tinned tuna to save money ambient seafood has experienced a long term decline in consumption. In the 52 wks. to 7th October 2023, ambient seafood sales were worth £559m (+3.1%), with a volume of 132,739 tonnes (+1.8%) and an average price of £8.01/kg (+4.4%) (Nielsen Scantrack).

UK seafood sector share by value 2023



Nielsen Scantrack YE 07.10.23

Ambient lost both value (-0.1pp) and volume (-0.2pp) share to frozen seafood.

Over the long term (10 years to 7th October 2023), ambient seafood remained in decline with value down -19.5% and volume down by -29.9%. Ambient average price per kg grew by +17.6%, which is relatively conservative compared to chilled and frozen where inflation was +36% and +57% respectively.

Ambient seafood KPIs

In the 52 wks. to 7th October 2023, despite a reduction in basket size more shoppers bought ambient seafood more often. On average, ambient shoppers bought 0.41kg of ambient fish per trip spending £6.55; buying chilled seafood 9.3 times per year, spending a total of £25.20, equating to 3.9kg over the year.

Ambient seafood KPIs 2023

		Pen %	Freq	AWOP (Kg) 52w	Avg Spend (£) 52w	Trip Spend (£)	Price per Kg	Avg Trip Kg
TOTAL SEAFOOD	08 OCT 2022	95.6	29.10	14.70	£140.88	£4.85	£9.57	0.51
	07 OCT 2023	95.0	29.00	14.50	£147.75	£5.09	£10.17	0.50
	% Change	-0.6	-0.1	-1.4	5.0	5.0	6.3	-1.3
CHILLED SEAFOOD	08 OCT 2022	80.9	19.50	7.70	£98.65	£5.06	£12.79	0.40
	07 OCT 2023	80.2	19.10	7.40	£102.38	£5.35	£13.90	0.38
	% Change	-0.9	-1.8	-4.5	4.0	5.7	8.7	-2.7
FROZEN SEAFOOD	08 OCT 2022	84.3	10.50	5.70	£43.44	£4.14	£7.57	0.55
	07 OCT 2023	83.6	10.50	6.00	£47.28	£4.49	£7.85	0.57
	% Change	-0.9	0.5	4.9	9.0	8.3	3.7	4.4
AMBIENT SEAFOOD	08 OCT 2022	75.6	9.00	4.00	£24.06	£2.66	£6.09	0.44
	07 OCT 2023	74.3	9.30	3.90	£25.20	£2.71	£6.55	0.41
	% Change	-1.7	2.9	-2.5	5.0	1.8	7.5	-5.3

Nielsen Homescan YE 07.10.23

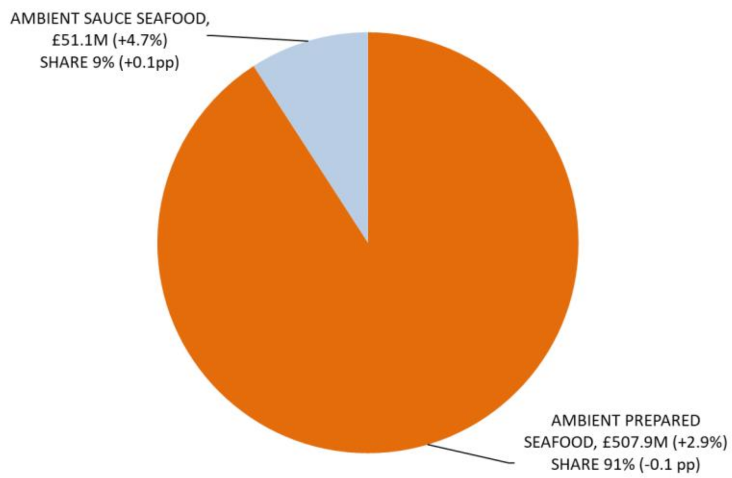
Ambient seafood segment performance

Ambient seafood now has only two segments, ambient prepared which is predominantly made up of traditional tinned fish in brine, spring water or oil and ambient sauce, which contains products like mackerel in tomato sauce.

It is the prepared segment (i.e., seafood with additional ingredients), which continues to take the largest value (91%), and volume (90%) share of ambient seafood. Values shares remain flat, however ambient prepared lost share by -0.1%, and saw a significant volume decrease of -4.8% compared to last year. In the 52wks to 7th October 2023, ambient prepared was worth £508m (+2.9%), with 71, 717 (-4.8%) tonnes and an average price of £7.08 (+8.1%). Both ambient prepared and ambient sauce sectors experienced heavy long term decline (10yrs to 8th October 2022). Ambient prepared showed the greatest consumption decline at -36%.

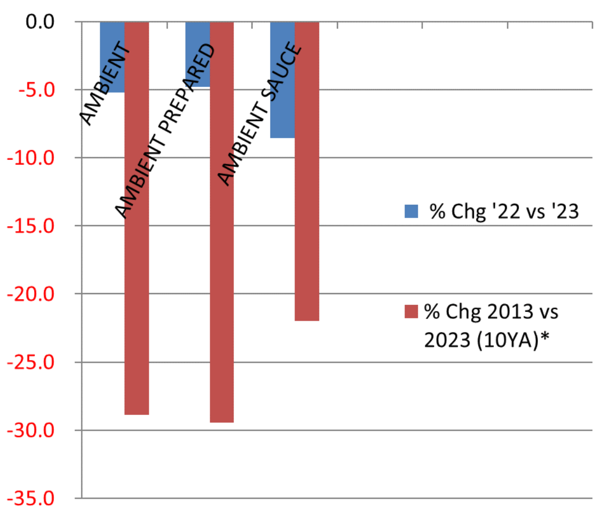
An opportunity for growth could be to develop ambient sauce products following trending foodservice flavours. The well-established trend for street food remains strong with diners looking for authentic global cuisine experiences. Chaat masala; a staple spice blend in North India is growing in popularity. Uren (ingredient specialists) expect to see growing interest in creative flavour combinations that feature complex hot sauces and spices, such as harissa, gochujang and sriracha. These flavours can provide an interesting contrast when paired with milder ingredients such as yoghurt or cheese.

UK ambient seafood segment value share 2023



Nielsen Scantrack YE 07.10.23

Ambient seafood segment volume performance 2023



*Nielsen Scantrack YE 07.10.23 (*10yr GB)*

Ambient seafood segment performance to 2023

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2021 52wks to 07.10.21	2022 52wks to 07.10.22	2023 52wks to 07.10.23	% Chg '22 vs '23	% Chg 2013 vs 2023 (10YA)*	2021 52wks to 07.10.21	2022 52wks to 07.10.22	2023 52wks to 07.10.23	% Chg '22 vs '23	% Chg 2013 vs 2023 (10YA)*	Avg Price 2023	% Chg '22 vs '23	% Chg 2013 vs 2023 (10YA)*
FISH	4,247,258	4,073,559	4,218,974	3.6	10.7	422,495	394,917	378,450	-4.2	-21.8	£11.15	8.1	41.4
FRESH	2,634,796	2,531,272	2,597,221	2.6	19.4	195,341	180,624	166,217	-8.0	-11.7	£15.63	11.5	35.1
FROZEN	1,065,946	999,942	1,062,742	6.3	8.9	144,638	130,439	132,729	1.8	-30.0	£8.01	4.5	55.5
AMBIENT	546,517	542,345	559,011	3.1	-17.8	82,515	83,854	79,505	-5.2	-28.9	£7.03	8.7	15.6
AMBIENT PREPARED	497,155	493,568	507,929	2.9	-18.5	73,909	75,340	71,717	-4.8	-29.4	£7.08	8.1	15.5
AMBIENT SAUCE	49,361	48,777	51,082	4.7	-7.2	8,606	8,514	7,788	-8.5	-22.0	£6.56	14.5	18.9

*Nielsen Scantrack YE 07.10.23 (*10yr GB)*

Ambient seafood species

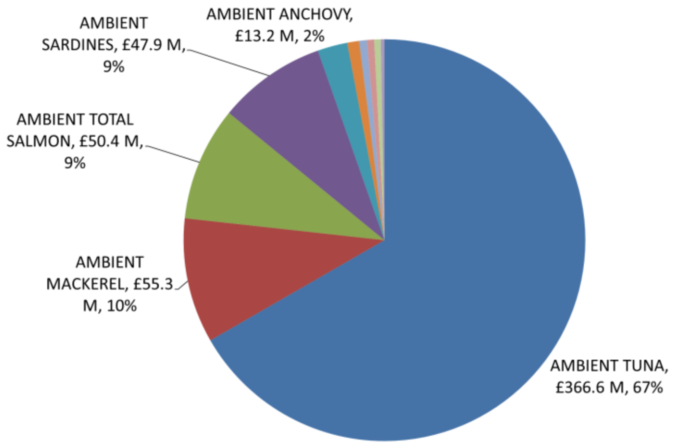
Tuna continues to dominate the ambient seafood sector, taking 67% (-0.5pp) of all ambient seafood sales by value, of the top 10 ambient species, but loses share. Mackerel displaced salmon last year to become as the second most valuable ambient species, selling double the amount of ambient salmon by volume.

Compared to last year, only sardines and herring out of the top 10 ambient species were in growth. Herring (+33.4%) showed the highest volume growth, whilst cod roe (-35.8%) showed the highest decline.

Many ambient species were in heavy volume decline over the long term (10yrs to 7th October 2023), some seeing a consumption decline of over 60%. No species saw a growth in consumption out of the of the top 10, however ambient roe, 'other' cod and caviar species grew strongly.

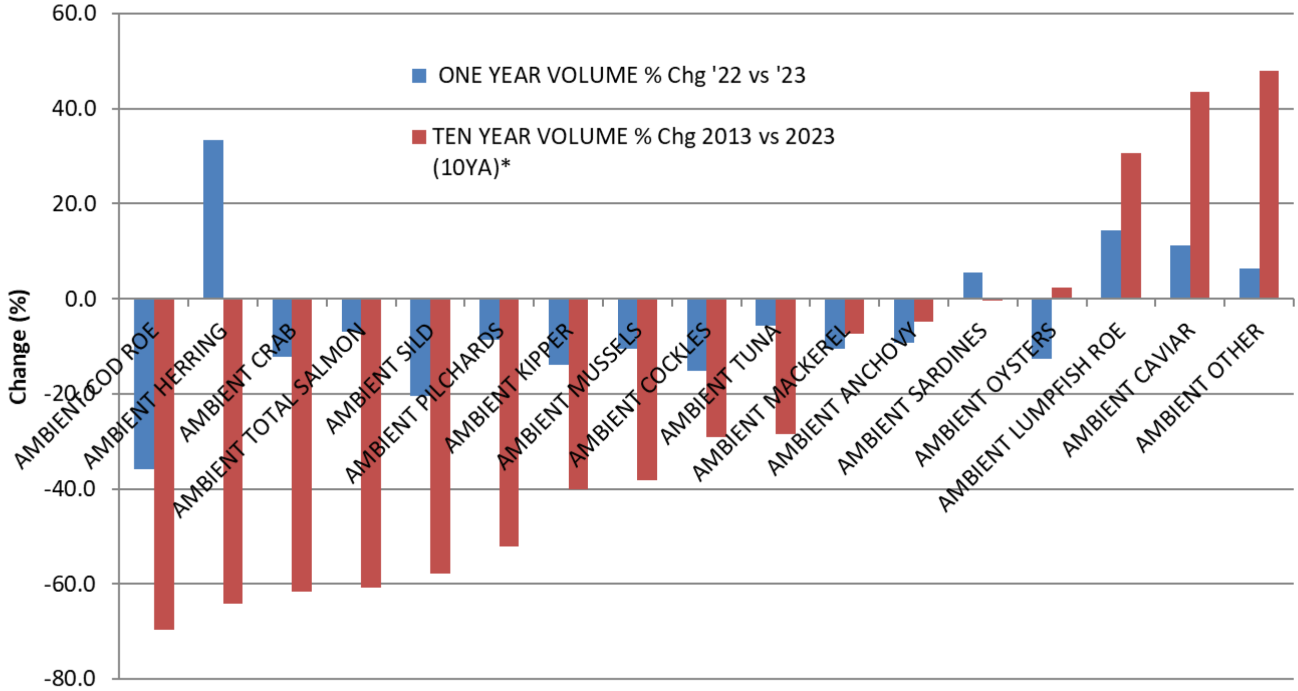
Over the past 10 years ambient seafood has experienced relatively modest inflation (+16%) compared to chilled (+35%) and frozen (+56%).

UK Ambient seafood species value share 2022



Nielsen Scantrack YE 08.10.22

Ambient seafood species volume performance 2023



Nielsen Scantrack YE 07.10.2023 (10yr GB)

Ambient seafood species performance to 2023

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2021 52wks to 07.10.21	2022 52wks to 07.10.22	2023 52wks to 07.10.23	% Chg '22 vs '23	% Chg 2013 vs 2023 (10YA)*	2021 52wks to 07.10.21	2022 52wks to 07.10.22	2023 52wks to 07.10.23	% Chg '22 vs '23	% Chg 2013 vs 2023 (10YA)*	Avg Price 2023	% Chg '22 vs '23	% Chg 2013 vs 2023 (10YA)*
FISH	4,247,258	4,073,559	4,218,974	3.6	10.7	422,495	394,917	378,450	-4.2	-21.8	£11.15	8.1	41.4
FRESH	2,634,796	2,531,272	2,597,221	2.6	19.4	195,341	180,624	166,217	-8.0	-11.7	£15.63	11.5	35.1
FROZEN	1,065,946	999,942	1,062,742	6.3	8.9	144,638	130,439	132,729	1.8	-30.0	£8.01	4.5	55.5
AMBIENT	546,517	542,345	559,011	3.1	-17.8	82,515	83,854	79,505	-5.2	-28.9	£7.03	8.7	15.6
AMBIENT TUNA	356,807	358,339	366,604	2.3	-16.7	57,633	60,189	56,800	-5.6	-28.4	£6.45	8.4	16.3
AMBIENT MACKEREL	53,759	53,618	55,273	3.1	-2.4	8,396	8,145	7,288	-10.5	-7.4	£7.58	15.2	5.4
AMBIENT TOTAL SALMON	56,354	53,338	50,420	-5.5	-47.0	3,757	3,633	3,383	-6.9	-60.9	£14.91	1.5	35.5
AMBIENT SARDINES	39,042	39,825	47,864	20.2	18.4	8,264	8,004	8,440	5.4	-0.4	£5.67	14.0	18.9
AMBIENT ANCHOVY	12,760	12,265	13,228	7.9	31.7	931	762	691	-9.3	-4.9	£19.13	18.9	38.5
AMBIENT PILCHARDS	4,972	5,056	5,252	3.9	-40.5	1,540	1,532	1,400	-8.6	-52.2	£3.75	13.7	24.3
AMBIENT COCKLES	3,958	3,722	3,391	-8.9	-10.4	399	346	294	-15.2	-29.1	£11.55	7.5	26.4
AMBIENT HERRING	2,858	2,289	3,208	40.2	-48.6	446	283	378	33.4	-64.1	£8.48	5.1	43.0
AMBIENT CRAB	3,945	3,299	2,846	-13.7	-48.1	212	174	153	-12.1	-61.7	£18.64	-1.8	35.2
AMBIENT KIPPER	1,792	1,639	1,639	-0.0	-10.9	177	157	135	-14.0	-40.0	£12.15	16.2	48.6
AMBIENT MUSSELS	1,694	1,584	1,534	-3.1	-11.6	166	144	129	-10.5	-38.3	£11.91	8.2	43.3
AMBIENT LUMPFISH ROE	1,137	1,129	1,357	20.2	54.4	30	29	34	14.5	30.6	£40.45	5.0	18.3
AMBIENT OTHER	967	914	1,074	17.6	291.4	99	81	86	6.5	48.0	£12.46	10.4	164.4
AMBIENT COD	880	784	849	8.3	600.0	57	49	50	3.1	414.7	£16.96	5.1	36.0
AMBIENT COD ROE	1,146	1,027	800	-22.2	-51.5	120	104	67	-35.8	-69.7	£12.01	21.3	n/a
AMBIENT CAVIAR	645	660	743	12.6	65.4	13	11	12	11.2	43.6	£60.85	1.3	15.1
AMBIENT SILD	777	764	684	-10.4	-43.2	64	58	46	-20.4	-57.8	£14.86	12.5	34.7
AMBIENT OYSTERS	534	643	659	2.5	46.2	20	23	20	-12.7	2.5	£32.35	17.5	42.6
AMBIENT POLLOCK	602	507	430	-15.2	#N/A	70	53	37	-28.9	#N/A	£11.51	19.2	#N/A

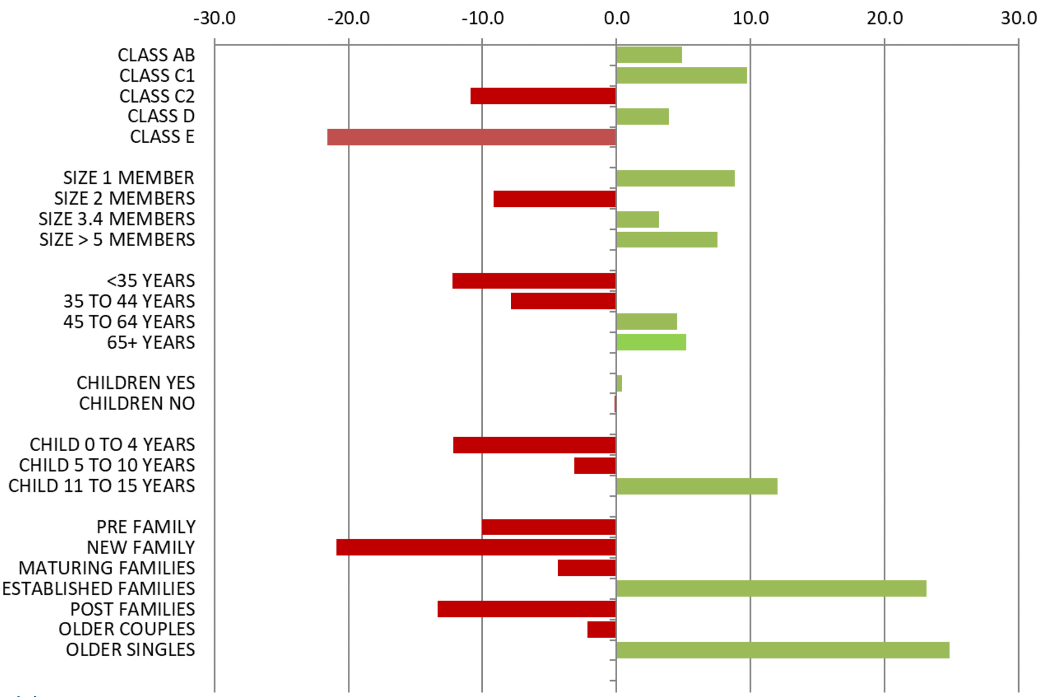
*Nielsen Scantrack YE 07.10.2023 (*10yr GB): 'Other 'is where the seafood species is not identified i.e., ' fish fingers' or 'fish' pie*

The ambient seafood shopper

Nielsen demographics describe the ambient seafood shopper as slightly less affluent than the average seafood buyer but this gap is closing fast. They are also predominantly younger with a higher proportion of under 35's and 35 to 44 shoppers; and less 65+ shoppers. Predominantly purchased by two person households and medium sized households without children present. Where children are present, they are typically aged 11-15 yrs.

Compared to 2016, ambient seafood has attracted older and significantly more affluent ABC1 (professionals and white collar) shoppers; perhaps driven by the recent demand for premium imported tinned seafood, tinned anchovy for home cooking and mackerel which makes a healthy, tasty convent snack or desk staple for office workers. Ambient saw a significant increase (+54%) in single member and larger person households', and where children were present, an increase in the 11-15 year old age group, and established families and older singles.

Change in ambient seafood Demographic 2023 vs 2016 (%)



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Ambient seafood demographics share 2023 vs 2016

	TOTAL SEAFOOD (% Share)	Total % Chg	CHILLED (% Share)	Chilled % Chg	FROZEN	Froz % chg	AMBIENT	amb % chg
CLASS AB	32.4	10.5	36.6	10.8	29.5	14.8	28.8	4.9
CLASS C1	30.3	10.3	30.4	11.2	30.2	9.6	30.3	9.8
CLASS C2	17.9	-12.5	16.3	-9.1	18.8	-17.5	19.8	-10.9
CLASS D	12.4	11.2	10.6	13.4	13.9	12.5	13.4	3.9
CLASS E	6.9	-39.9	6.0	-51.0	7.5	-34.6	7.7	-21.6
SIZE 1 MEMBER	24.4	3.3	28.0	1.0	20.3	5.4	23.9	8.8
SIZE 2 MEMBERS	38.2	-9.3	41.7	-9.3	35.8	-8.8	35.0	-9.2
SIZE 3.4 MEMBERS	30.1	7.6	25.7	13.5	34.1	3.9	32.4	3.2
SIZE > 5 MEMBERS	7.3	16.3	4.6	26.0	9.7	13.5	8.6	7.5
<35 YEARS	11.5	-0.7	9.7	5.6	13.0	0.0	12.5	-12.2
35 TO 44 YEARS	14.9	-7.6	12.6	-8.0	16.4	-7.8	17.1	-7.9
45 TO 64 YEARS	36.9	1.7	34.6	1.9	37.8	-0.7	39.9	4.5
65+ YEARS	36.8	2.0	43.0	-0.1	32.9	5.2	30.4	5.2
CHILDREN YES	23.8	5.3	18.2	14.6	28.6	-0.1	27.0	0.4
CHILDREN NO	76.2	-1.5	81.8	-2.8	71.4	0.0	73.0	-0.2
CHILD 0 TO 4 YEARS	23.6	-7.1	24.8	-4.8	23.7	-6.2	21.9	-12.2
CHILD 5 TO 10 YEARS	39.0	-2.6	37.9	-4.4	40.3	-1.1	38.1	-3.2
CHILD 11 TO 15 YEARS	37.4	8.3	37.3	8.8	36.0	5.8	40.0	12.0
PRE FAMILY	5.6	-4.2	5.7	-0.2	5.2	-4.9	6.3	-10.0
NEW FAMILY	4.3	-7.2	3.9	12.6	4.8	-15.5	4.3	-20.9
MATURING FAMILIES	12.4	2.7	8.8	8.7	15.8	0.8	13.9	-4.4
ESTABLISHED FAMILIES	9.7	16.0	7.5	15.3	11.0	10.9	12.0	23.1
POST FAMILIES	14.6	-12.1	14.3	-12.2	14.1	-11.2	15.9	-13.3
OLDER COUPLES	35.4	-1.9	38.9	-2.1	33.9	-0.8	30.7	-2.2
OLDER SINGLES	18.0	10.0	20.8	3.5	15.2	15.2	16.9	24.8

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