Market insight factsheet
Prawn and Shrimp 2019

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

Prawns and shrimps include species including cold water prawns (CW prawns), warm water prawns (WW prawns) and shrimps. In the retail data these are distinguishable however limitations in the trade and supply, and foodservice data mean that prawns and shrimp data for these sectors are presented as an overall product group.

Trade and supply (2018)

Prawns and shrimps are the 3rd most imported species by volume, alongside salmon. In terms of volume, most imports were from Vietnam and most exports were to the Irish Republic.

Current stocks and aquaculture profiles (2017)

Data in these two sections are from Seafish resources. Data on stocks are taken from the Risk Assessment for Sourcing Seafood (RASS) and aquaculture profiles taken from the Aquaculture Profiles Web Tool.

Retail (data to 22/02/2020)

Worth £528.5m, prawns and shrimps combined are 14% of the total seafood sales and are the 4th most purchased species in terms of volume, 39,192 tonnes, and seeing year on year growth.

Foodservice (2019)

9% of all the seafood consumed out of home are prawns and shrimps. They are mostly purchased in the quick service channel, whilst most likely to be consumed by women in pubs.
Trade and supply

Prawn and shrimp species are categorised for trade and supply data purposes as: crustaceans, miscellaneous shrimps, other cold-water shrimps, shrimp crangon spp and tropical shrimp.

Landings

Species of prawns and shrimps that are landed into the UK by UK vessels are mainly brown shrimp (*Crangon crangon*).

Only a small amount of prawns and shrimps are landed into the UK by UK vessels. In 2018 this figure increased from 600 tonnes to 1,100 tonnes, an 83% growth since 2017. The total landings value of £2.7m was up +4% compared to 2017.

Imports

The vast majority of prawns and shrimps available in the UK for domestic use are imported from other countries. Of the total seafood volume imported to the UK, 12% are prawns and shrimps.

76,000 tonnes of prawns and shrimps were imported into the UK in 2018. Compared to 2017 imports, this was a decline of 5,000 tonnes (-6%). The value was £607.2m declining £84.5m (-12%).

Over half of the UK imports were from Asia, mostly Vietnam and India. Table 1 shows more details of the top 5 exporting countries by import volume of prawns and shrimps.

Table 1: Imports to the UK of prawns and shrimps by exporting country (Top 5)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Exporting Country</th>
<th>Volume (tonnes)</th>
<th>Growth (YoY)</th>
<th>Share of Total Imports</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2017</td>
<td>2018</td>
<td>Percentage</td>
</tr>
<tr>
<td>1</td>
<td>Vietnam</td>
<td>15,762</td>
<td>17,912</td>
<td>13.6%</td>
</tr>
<tr>
<td>2</td>
<td>India</td>
<td>15,836</td>
<td>12,921</td>
<td>-18.4%</td>
</tr>
<tr>
<td>3</td>
<td>Denmark</td>
<td>7,989</td>
<td>8,825</td>
<td>10.5%</td>
</tr>
<tr>
<td>4</td>
<td>Canada</td>
<td>8,596</td>
<td>5,038</td>
<td>-41.4%</td>
</tr>
<tr>
<td>5</td>
<td>Iceland</td>
<td>3,200</td>
<td>4,417</td>
<td>38.0%</td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td><strong>81,863</strong></td>
<td><strong>76,683</strong></td>
<td><strong>-6.3%</strong></td>
</tr>
</tbody>
</table>
Of all the imported species, prawns and shrimps were joint third with salmon, in terms of volume. Only tuna and cod had higher import volumes. With the exception of salmon all these imported species experienced volume declines in 2018.

Exports

The UK’s exported prawns and shrimps are usually from supply that has been imported into the country. 3% of the total exported seafood volume was from prawns and shrimps.

13,000 tonnes of prawns and shrimps were exported from the UK to other countries, worth £88.8m. This is a decline from 2017 (-8%) with 1,000 tonnes and £17.8m (-17%) less.

The majority of exports are to European countries, mostly the Irish Republic and Germany. Almost 70% of the total volume of prawns and shrimps we export was to 5 countries, all in Europe (Table 2).

Table 2: Exports from the UK of prawns and shrimps by destination country (Top 5)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Destination Country</th>
<th>Volume (tonnes)</th>
<th>Growth (YoY)</th>
<th>Share of Total Exports</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Irish Republic</td>
<td>3,069</td>
<td>-5.5%</td>
<td>170 22%</td>
</tr>
<tr>
<td>2</td>
<td>Germany</td>
<td>2,307</td>
<td>-13.4%</td>
<td>310 15%</td>
</tr>
<tr>
<td>3</td>
<td>France</td>
<td>2,718</td>
<td>-40.9%</td>
<td>1,111 12%</td>
</tr>
<tr>
<td>4</td>
<td>Netherlands</td>
<td>984</td>
<td>45.7%</td>
<td>450 11%</td>
</tr>
<tr>
<td>5</td>
<td>Denmark</td>
<td>1,170</td>
<td>-18.6%</td>
<td>218 7%</td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>14,240</td>
<td>-7.5%</td>
<td>1,069</td>
</tr>
</tbody>
</table>

Of all the species exported from the UK, prawns and shrimps ranked sixth in terms of volume. Salmon, mackerel, herring, crabs and cod all exceeded prawn and shrimp export volumes. With the exception of herring and crabs, all species experienced year on year declines.
**Current stocks**

**Cold water prawns and shrimps**

Cold water shrimps and prawns are from waters of the North and South Atlantic, and North Pacific. The group consists of several species mainly Northern shrimp or prawn (*Pandalus borealis*) and Common or Brown shrimp (*Crangon crangon*).

The majority of cold water prawns sold in the UK come from the wild capture fisheries in the North Atlantic around Greenland and East Canada.

Though the stock statuses of cold water prawns are quite variable, the capture fisheries (predominantly demersal otter trawl) operate in a stable management regime, and future supply is likely to remain reasonably stable.

**Warm water prawns and shrimps**

Warm water prawns (*Penaeid*) species are typically farmed in ponds in tropical marine areas in SE Asia and Central America. Though they can be sourced from wild capture fisheries, sources from aquaculture are most prevalent.

Two species dominate aquaculture; the white leg prawn (*Litopenaeus vannamei* formally *Penaeus vannamei*) and the giant tiger prawn (*Penaeus monodon*).
Aquaculture profiles

Tiger prawn
Penaeus monodon

Tiger prawns (widely known as "monodon") are native to the warm marine waters of Australia, South and SE Asia, and East Africa. The farming of monodon is still reliant on wild seed, and as such farming of this species is concentrated around its native range; in extensive through to intensive ponds.

According to the FAO, some 0.74 million tonnes of monodon were farmed in 2017 which equated to around 13.5% of global marine ‘shrimp and prawn’ aquaculture, and worth around $5.6 billion.

White leg prawn
Litopenaeus vannamei

White leg prawns (widely known as "vannamei") are native to the warm marine waters of the Eastern Pacific. The availability of hatchery-reared seed has enabled vannamei to be farmed across the world, and the species dominates crustacean aquaculture.

FAO figures show vannamei accounted for around 81% of the global marine ‘shrimp and prawn’ production in 2017; this equated to over 4.45 million tonnes worth some $26.7 billion.
Prawns and shrimps are a popular species of shellfish in retail with product categories being cold water (CW) prawns, warm water (WW) prawns, and shrimps.

**Prawns and shrimps**

**Retail performance**
Prawns and shrimps combined value makes up 14% of the total seafood sales in retail worth £528.5 (+0.7%) and 10% of the overall volume sales of 39,192 tonnes (+0.9%). Compared with other species, prawns and shrimps ranked 4th in retail volume sales with only salmon, tuna and cod ranked above.

**Sector and segment**
Of the total prawns and shrimps volume sales, 63% are purchased in the chilled sector and 37% are frozen, with no sales in ambient. Over 50% are sold in the ‘natural’ format (i.e. no added ingredients).

**The shopper (GB)**
The overall shopper of prawns and shrimps tend to be from smaller households, are older and more affluent with no children.

**Warm water prawns**

**Retail performance**
Of the total prawns and shrimps, WW prawns are the most popular product category that shoppers are buying into with 61% of the prawn and shrimp volume share. As such it ranks in 6th place of all species volume sold in retail. Popularity is highlighted in growth, as compared to this time last year WW prawns saw strong volume (+5%) and value growth (+2%), with 24,077 tonnes and £329.4m in retail sales. Price per kg saw decreases (-3%) to £13.68.

**Sectors**
66% of WW prawn volume is sold within the chilled sector (+9%), 34% is frozen (-3%) with no ambient sales of WW prawns were made.

**Segments**
Over 50% of volume is purchased in a natural format (+2%). All of the 8 segments are experiencing growth, with over 10% of growth from sushi (+17%), sauce (+16%), cakes (13%) and batter (+10%).
Cold water prawns

Retail performance
Of the total prawns and shrimps, CW prawns are the 2nd most popular product category that shoppers are buying into with 37% of the prawn and shrimp volume share. They rank 9th across all species volume sold in retail. Compared to this time last year, CW prawns saw declines in volume (-6%) and value (-2%) with 14,470 tonnes and £188.0m in retail sales. Price per kg saw increases (+3%) to £13.00.

Sectors
61% of CW prawn volume is sold within the chilled sector (-8%), 39% is frozen (-2%) with no ambient sales of CW prawns made.

Segments
49% of volume is purchased in a natural format (-8%). As with natural, breaded (-40%), meals (-23%) and sauce (-2%) saw declines whilst batter (+33%), cakes (22%), prepared (+3%) and sushi (+34%) all experienced growth

Shrimps

Retail performance
Shrimps have the smallest volume sales in retail at only 2% of the combined prawn and shrimp volume share. They rank 28th of all species volume sold in retail. Shrimps have performed really well in retail when compared to this time last year, with growth in volume (+22%) and value (+16%) constituting 646 tonnes and £11.0m in sales. Price per kg saw decreases (-4%) to £17.10.

Sectors
In contrast to WW and CW prawns, the majority (78%) of shrimps are purchased in the frozen sector (+28%) while 22% are in chilled (+4%); no ambient sales were made.

Segments
54% of volume is purchased in a natural format (+29%). As natural, breaded (+74%), meals (+7%), prepared (+10%) and sushi (+7%) all saw growth, batter (-70%) and sauce (-2%) experienced declines.
Foodservice

Prawns and shrimps are a popular species purchased by consumers out of home and can be served in a range of formats from prawn cocktails to batter and breaded. 9% of the total seafood consumed out of home are prawns and shrimps.

Total performance and channel performance
Of total shellfish purchases (233m servings), prawn and shrimps account for 48% (112m servings). Prawns and shrimps are mainly sold through the quick service restaurant channel (QSR) (45%), followed by full service restaurants (26%) pubs (13%) travel and leisure (11%) and workplace/college/universities (5%). Overall it was a strong year for prawns (+9% servings YoY change) with growth seen across the channels with the exception of pubs and travel and leisure.

Consumer demographics and motivations
Compared to total food and drink, prawns appeal more to an affluent consumer over 50 years of age. They are more likely to be consumed by women across each channel particularly in pubs where 71% of servings are served to female diners. They are popular with parties of adults without children with servings most likely to occur during lunch and dinner on a Sunday, Monday or Tuesday. Prawns need to be seen as a more convenient food type, linking to portable offerings in the QSR channel particularly.

Menu Trends
Prawns continue to have the highest menu penetration across all seafood dishes and continue to gain menu share. Trending menu items include the Cajun Popcorn Shrimp at Revolution Bars; lightly battered shrimp bites with a pop of Cajun spice served with zesty lemon mayo, priced at £5.00.

The number of UK outlets offering seafood on their menu declined slightly over the past year. Total seafood lost menu share across the main categories to supplementary meal parts such as add-ons and kids’ menus. Seafood appetisers and ethnic dishes are trending well particularly sushi appetisers, the fastest growing dish on the UK menu.

Popular flavours often paired with prawns and shrimp include garlic, tomato and chili with the incidence of small plates continuing to grow with the 4+ item sampler proving the most popular, a possible further opportunity for prawn and shrimp offerings.
References

- HMRC, accessed via BTS, 2019, Finalised Trade Data 2018
- Nielsen Scantrack, 52 we 28/12/2019
- Seafish, 2016, Aquaculture Profiles Web Tool
- Seafish, 2019, Risk Assessment for Sourcing Seafood (RASS)
- Seafish, 2019, Seafood in Foodservice
- Seafish, 2019, UK Seafood Trade Summary
- Technomic, July 2019, Seafood Trends Across U.K. Restaurants
- The NPD Group, YE December 2019, Prawn Report
- The NPD Group, YE December 2019, Seafood Data Sheet, Q4 Report

Subscribe to market insight reports

Individuals working full time for a seafood business can apply for a password to access Seafish Retail, Foodservice, Shopper and Trade Reports directly. Click here to subscribe.

More information

For the full range of market insight factsheets, covering different sectors of the seafood industry go to the Seafish website. Click here to visit website

S Pegg-Darlison
Seafish Origin Way, Europarc, Grimsby, DN37 9TZ
t: +44 (0) 1472 252331
e: info@seafish.co.uk
w: www.seafish.org
f: +44 (0) 1472 268 792