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)

Rank	Exporting Country	Volume (tonnes)		Growth (YoY)		Share of Total Imports
		2017	2018	Percentage	Actual	
1	Vietnam	15,762	17,912	13.6%	2,150	23%
2	India	15,836	12,921	-18.4%	2,916	17%
3	Denmark	7,989	8,825	10.5%	835	12%
4	Canada	8,596	5,038	-41.4%	3,558	7%
5	Iceland	3,200	4,417	38.0%	1,218	6%
	Grand Total	**81,863**	**76,683**	-6.3%	5,180	

Trade and Supply
[HMRC, via BTS, 2019](#)
[MMO, 2018, National Statistics…2018](#)
[Seafish, 2019, UK Seafood Trade Summary](#)

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.

13,000tonnes 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)

Rank	Destination Country	Volume (tonnes)		Growth (YoY)		Share of Total Exports
		2017	2018	Percentage	Actual	
1	Irish Republic	3,069	2,899	-5.5%	170	22%
2	Germany	2,307	1,997	-13.4%	310	15%
3	France	2,718	1,608	-40.9%	1,111	12%
4	Netherlands	984	1,434	45.7%	450	11%
5	Denmark	1,170	952	-18.6%	218	7%
	Grand Total	**14,240**	**13,171**	-7.5%	1,069	

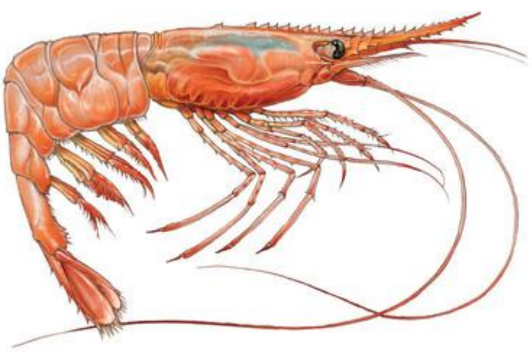
Of all the species exported from the UK, prawns and shrimps ranked sixth in terms of volume. Salmon, mackerel, herring, crabs and cod all exceeded prawn and shrimp export volumes. With the exception of herring and crabs, all species experienced year on year declines.

Trade and Supply
HMRC, via BTS, 2019
MMO, 2018, National Statistics…2018
Seafish, 2019, UK Seafood Trade Summary

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*).



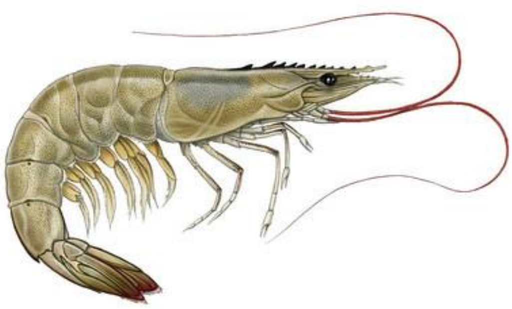
The majority of cold water prawns sold in the UK come from the wild capture fisheries in the North Atlantic around Greenland and East Canada.

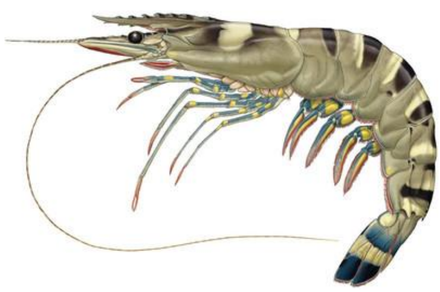
Though the stock statuses of cold water prawns are quite variable, the capture fisheries (predominantly demersal otter trawl) operate in a stable management regime, and future supply is likely to remain reasonably stable.

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)*.





Current Stocks
Seafish, 2019, Risk Assessment for Sourcing Seafood

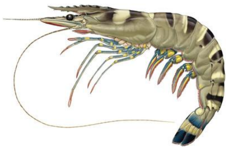
Aquaculture profiles

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.

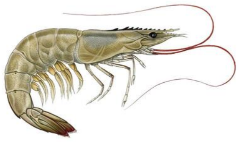


White leg prawn

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.



Aquaculture Profiles
Seafish, 2016, Aquaculture Profiles Web Tool
(data from FAO 2019)

UK retail including discounters (52 week data to w/e 22.02.2020)

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%).

Retail
[Nielsen Scantrack, 52 we 28/12/2019](#)
[The NPD Group, YE September 2019, Quarterly Crest](#)

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.

Retail
Nielsen Scantrack, 52 we 28/12/2019
The NPD Group, YE September 2019, Quarterly Crest

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.

Foodservice

Technomic, July 2019, Seafood Trends Across U.K. Restaurants
The NPD Group, YE December 2019, Seafood Data Sheet
The NPD Group, YE December 2019, Prawn Report
Seafish, 2019, Seafood in Foodservice

References

- HMRC, accessed via BTS, 2019, Finalised Trade Data 2018
- Marine Management Organisation, September 2018, National Statistics: UK sea fisheries annual statistics report 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