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Ambient Seafood in Multiple Retail
2021

This factsheet provides a summary of the performance of ambient, shelf stable seafood in the multiple retail seafood market up to July 2021.

A market insight analysis

September 2021 – by Julia Brooks

Ambient seafood is the smallest seafood sector in UK retail, it had been struggling in terms of volume sales over the long term, but in 2020 benefited from a boost from the increased number of in-home meal occasions and lockdown “panic buying”.

Levels have since dropped back, and the sector is now reporting declining sales value and volume, losing share to the chilled and frozen sectors. However, unit sales have increased over the last year as shoppers switched to buy smaller, cheaper packs. The average price per kg has also declined, but at a slower rate.

This document examines the detail behind the performance of the ambient seafood sector including historic and current retail seafood sector trends, key performance indicators (KPIs), shopper profiles, segment, and species performance.

Key takeaways

In 2020 the ambient sector reported some significant sales increases driven by shoppers’ stock piling and more in-home meal occasions. Whilst levels did fall back over the year, they remain higher than pre-pandemic 2019.

The latest annual data to 17 July 2021 reports the UK’s ambient seafood sales to be worth £575m (-5.2%), for 89k tonnes (-2.2%), 430m units (+8.1%). The average price per kg has reduced -3% to £6.45/kg and the average price per unit is now £1.34, which is -12.2% lower than last year.

The ambient ‘prepared’ segment continues to dominate market share by both volume (90%) and value (91%) of the ambient seafood sector.

Four species dominate the ambient sector and hold 92% share of sales value: tuna (65%), salmon (10%), mackerel (10%), sardines (7%), anchovy (3%), pilchards (1%). Out of these only Anchovy reported an increase in sales value during the last year.

The latest key performance indicators (KPIs) show that 77% of the population (penetration), bought ambient seafood more than 9 times last year. On average each shopper bought 2, 437g packs for £1.36 per pack, every trip.

When compared to their market share of total seafood value, ambient seafood overperforms with five retailers: Tesco, Aldi, Asda, Lidl, and Farmfoods. Ambient seafood sales in the following retailers have also increased: Lidl (+12%), Ocado (+19%), Farmfoods (+9%), and M&S (19%).

Most of the ambient seafood is purchased by smaller, more affluent ABC1 households, that are over 45 years old, and include no children. However, in comparison to total seafood, ambient seafood does overperform with other shopper groups including less affluent, larger households that tend to be younger and contain children and families.

Historic retail seafood sector trends

Until the arrival of the Covid-19 pandemic in March 2020, retail seafood sales had been in long term price driven growth as inflation has driven average price up whilst volume declined. The popularity of ambient seafood has declined with British retail shoppers over the past 13 years. In 2006, both the volume and value of ambient seafood experienced a sharp increase before seeing steady declines from 2008 onwards.

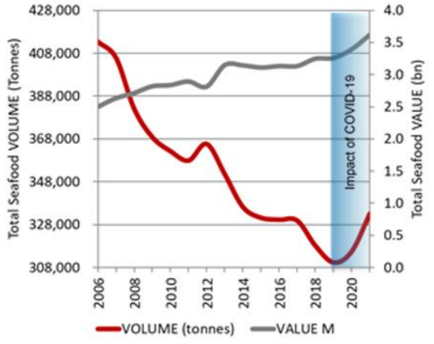
Overall Great Britain's (GB) seafood consumption had been growing slowly but steadily until recession hit in 2007, when the relatively high price of seafood meant it struggled to compete with cheaper proteins. Over the long term (last 13 years), retail seafood sales have been in price driven growth and volume decline.

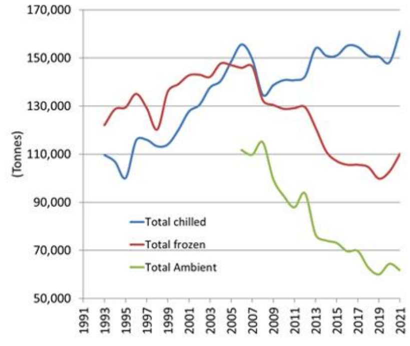
The popularity of ambient seafood has declined with British retail shoppers over the past 13 years. In 2006, both the volume and value of ambient seafood experienced a sharp increase before seeing steady declines from 2008 onwards.

Overall GB seafood consumption had been growing slowly but steadily until recession hit in 2007, when the relatively high price of seafood meant it struggled to compete with cheaper proteins. In October 2016, total seafood, which includes chilled, frozen, and ambient, briefly returned to full growth for a short period.

However, in 2017, signs began to emerge that building pressure from economic & political uncertainty, along with rising inflation and reduced spending power were all beginning to impact on the seafood retail market once again. Total seafood volume returned to decline in January 2017 and notably, the chilled sector fell into volume decline in September 2017, which continued to late 2018. 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. The initial UK lockdown prompted high levels of stockpiling ambient and frozen seafood, with a shift away from chilled.

Over the course of the year the chilled category returned to its dominant position reporting strong growth. The frozen sector continues to report growth on 2020 higher base. Ambient seafood sales are lower than 2020 however they remain above pre-pandemic levels.



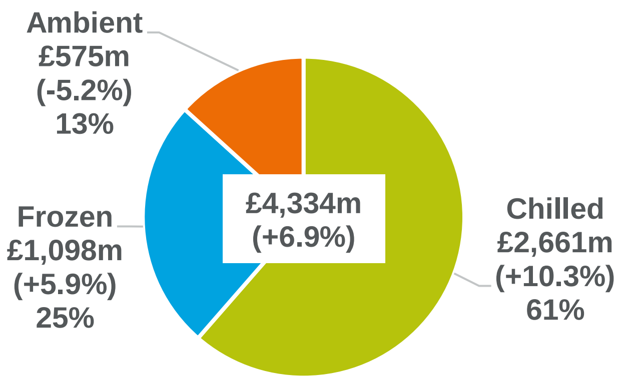


Source: GB NielsenIQ ScanTrack

Current seafood retail performance

The retail data quoted in this section is sourced from Nielsen ScanTrack which is based on retailer Electronic Point of Sale (EPOS) data. This data reflects performance in the United Kingdom (UK), which is a sum of GB major multiple supermarkets, GB discounters Aldi and Lidl, plus the major multiple supermarkets in Northern Ireland including Musgraves.

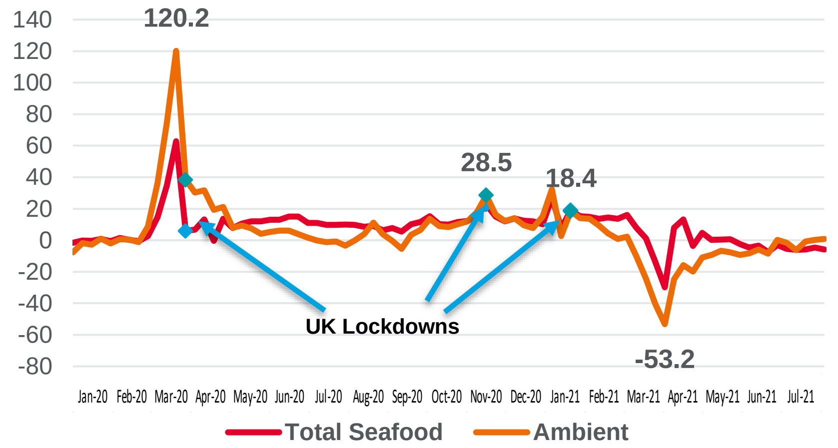
UK Seafood Sales £ by Sector



Trends suggest that shoppers are buying smaller, cheaper packs of seafood. Within the UK the total seafood category performance has maintained positive sales growth across all measures. The latest data reports a sales value of £4.3bn (+6.9%), with a volume of 439k tonnes (+5.5%), unit sales also increased to 1.7bn (+7.8%). Whilst the average price of a unit of seafood has fallen to £2.58 (-0.9%), the average price per kg has increased to £9.88 (+1.3%).

In 2020 the ambient sector reported some significant sales increases driven by shoppers' stock piling and increased number of in-home meal occasions. The week prior to the first lockdown saw a 120.2% increase in ambient seafood sales volume, compared to total seafood's 62.8% increase. Whilst levels did fall back over the year, overall sales volume for ambient seafood in 2020 was 12% higher than 2019. Performance in 2021 continued to slow, reporting a 53.2% decline in March, but this was in comparison to the spike in 2020, and sales remain higher than pre-pandemic 2019.

Weekly Sales Volume % Change



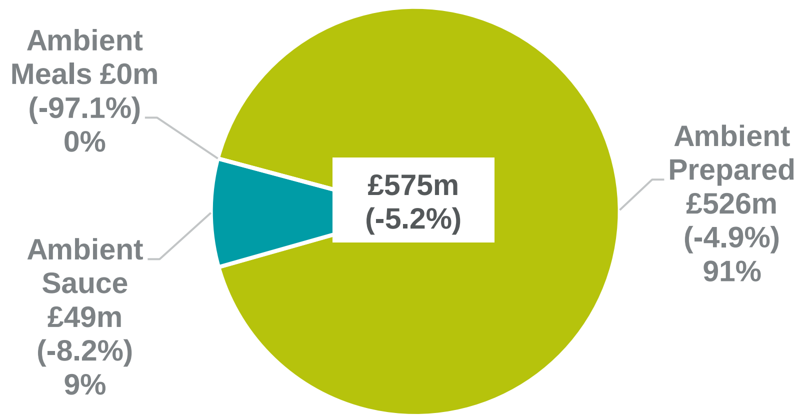
The latest annual data to 17 July 2021 reports the UK's ambient seafood sales to be worth £575m (-5.2%), for 89k tonnes (-2.2%), 430m units (+8.1%). Value sales are declining at a faster rate than volume sales as the average price per kg has reduced -3% to £6.45/kg. This, and the increase in unit sales suggests that shoppers are switching to smaller, cheaper products as the average price per unit is now £1.34, which is -12.2% lower than last year.

Ambient seafood segments

The ambient 'prepared' (packed with brine / water / oil / marinade) segment continues to dominate market share by both volume (90%) and value (91%) of the ambient seafood sector. In the last year, ambient prepared was worth £526m (-4.9%), for 80,627 tonnes (-1.3%). The sauce segment accounted for 10% of ambient volume with 8,555 tonnes (-9.7%) sales, and 9% of sales value with £49m (-8.2%) sales. The meals sector reported negligible sales.

When compared to 2019, prepared sales value is 5% higher, and sales volume is up 9%. In contrast the sauce segment has increased value 4% whilst volume has declined -5%.

UK ambient seafood segment sales £ 52we July'21



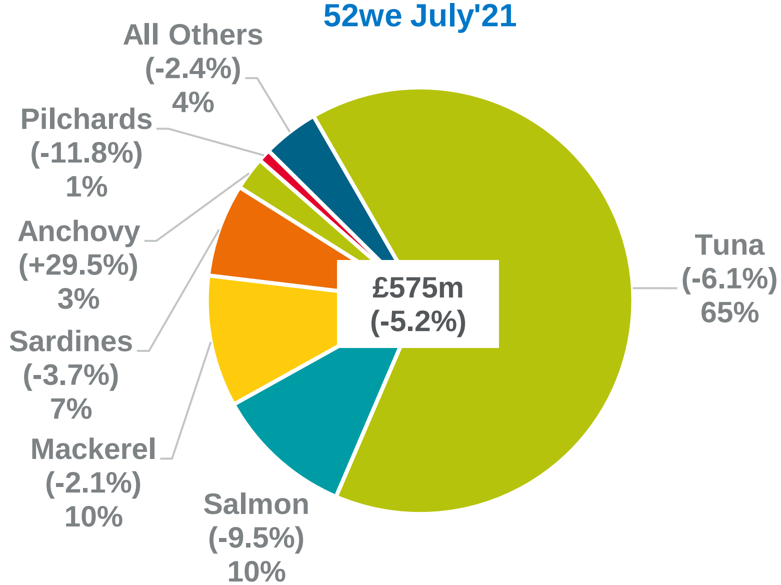
Ambient seafood segment performance 52we July'21

	Value Sales ('000)		Volume Sales ('000 KG)		Unit Sales ('000)		Price per KG		Price per Unit	
	52 WE 17.07.21	% Chg	52 WE 17.07.21	% Chg	52 WE 17.07.21	% Chg	52 WE 17.07.21	% Chg	52 WE 17.07.21	% Chg
Total Seafood	**£4,334,439**	6.9	**438,623**	5.5	**1,678,278**	7.8	**£9.88**	1.3	**£2.58**	-0.9
Chilled	**£2,661,428**	10.3	**201,342**	10.1	**837,468**	9.3	**£13.22**	0.2	**£3.18**	0.9
Frozen	**£1,098,148**	5.9	**148,099**	4.6	**410,725**	4.6	**£7.41**	1.2	**£2.67**	1.2
Ambient	**£574,862**	**-5.2**	**89,182**	**-2.2**	**430,085**	**8.1**	**£6.45**	**-3.0**	**£1.34**	**-12.2**
Ambient Prepared	£525,676	-4.9	80,627	-1.3	368,203	11.2	£6.52	-3.6	£1.43	-14.4
Ambient Sauce	£49,186	-8.2	8,555	-9.7	61,882	-7.3	£5.75	1.7	£0.79	-0.9
Ambient Meals	£0	-97.1	0	-97.1	0	-97.1	£3.99	-2.1	£0.96	-2.3

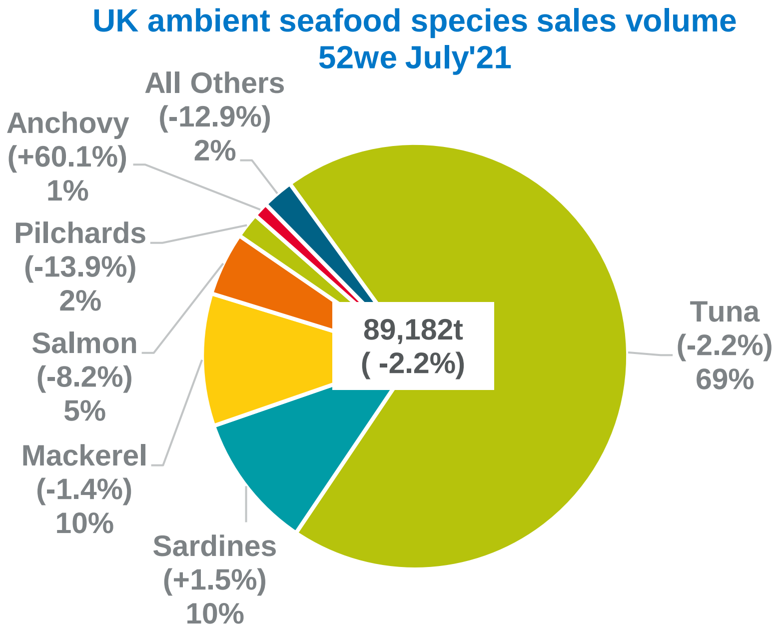
Ambient seafood species

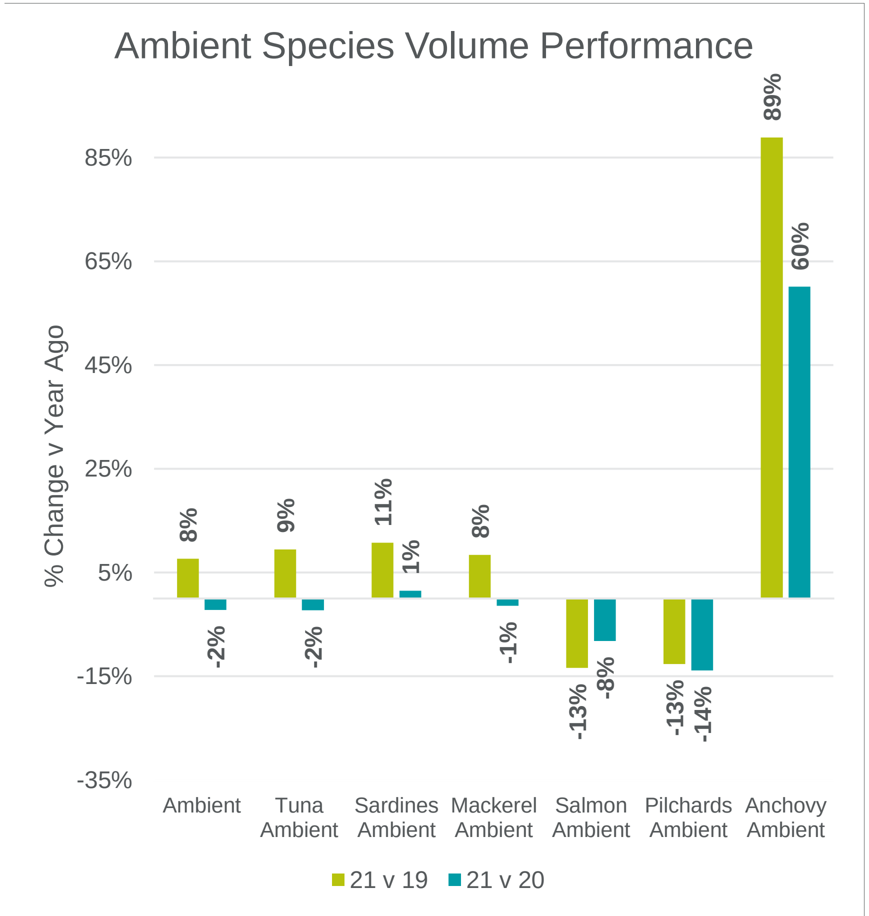
Four species dominate the ambient sector and hold 92% share of sales value: tuna (65%), salmon (10%), mackerel (10%), sardines (7%), anchovy (3%), pilchards (1%). Out of these only Anchovy reported an increase in sales value during the last year.

UK ambient seafood species sales value £ 52we July'21



The same four species account for 95% of sales volume, but in a slightly different order: tuna (69%), sardines (10%), mackerel (10%), salmon (5%). Two of these species, sardines and anchovy reported an increase in sales volume during the last year.





Given the impact of the pandemic in 2020, to get a clear picture of species individual performance we can compare sales against 2019. Overall ambient seafood volume sales in 2021 are 8% higher, and four out of the six top species are reporting growth during this time: tuna (+9%), sardines (+11%), mackerel (+8%), anchovy (+89%). Two species are reporting lower sales volume: salmon (-13%), and pilchards (-13%).

When looking at the top twenty ambient species performance in the UK over the latest year ending 17.07.21 (see following table), four species reported sales growth in terms of value and volume with a lower price per kg: anchovy, cockles, lumpfish roe, salmon roe. And a further four species reported higher sales volume and value with a higher price per kg: mussels, caviar, pollock, and octopus.

Ambient seafood species performance 52we 17 July 2021

	Value Sales ('000)				Volume Sales ('000 KG)				Unit Sales ('000)				Price per KG		Price per Unit	
	MAT 2YA	MAT YA	MAT TY	MAT % Chg. YA	MAT 2YA	MAT YA	MAT TY	MAT % Chg. YA	MAT 2YA	MAT YA	MAT TY	MAT % Chg. YA	MAT TY	MAT % Chg. YA	MAT TY	MAT % Chg. YA
AMBIENT	**£548,365**	**£606,162**	**£574,862**	**-5.2**	**82,854**	**91,185**	**89,182**	**-2.2**	**364,453**	**397,969**	**430,085**	**8.1**	**£6.45**	**-3.0**	**£1.34**	**-12.2**
TUNA AMBIENT	£357,749	£396,607	£372,425	**-6.1**	56,572	63,348	61,928	**-2.2**	171,819	192,673	223,793	**16.2**	£6.01	**-3.9**	£1.66	**-19.2**
TOTAL SALMON AMBIENT	£62,396	£66,489	£60,198	**-9.5**	4,956	4,676	4,294	**-8.2**	26,786	24,943	23,075	**-7.5**	£14.02	**-1.4**	£2.61	**-2.1**
MACKEREL AMBIENT	£50,355	£58,564	£57,326	**-2.1**	8,271	9,089	8,963	**-1.4**	65,748	72,384	71,449	**-1.3**	£6.40	**-0.7**	£0.80	**-0.8**
SARDINES AMBIENT	£38,831	£42,041	£40,489	**-3.7**	8,262	9,018	9,151	**1.5**	69,515	75,645	76,561	**1.2**	£4.42	**-5.1**	£0.53	**-4.8**
ANCHOVY AMBIENT	£8,969	£11,187	£14,488	**29.5**	538	634	1,016	**60.1**	8,937	10,283	15,330	**49.1**	£14.26	**-19.1**	£0.95	**-13.1**
PILCHARDS AMBIENT	£6,048	£6,239	£5,503	**-11.8**	1,964	1,992	1,716	**-13.9**	8,352	8,402	7,502	**-10.7**	£3.21	**2.4**	£0.73	**-1.2**
COCKLES AMBIENT	£3,884	£3,838	£4,174	**8.8**	393	386	420	**8.8**	2,330	2,285	2,479	**8.5**	£9.93	**-0.1**	£1.68	**0.3**
CRAB AMBIENT	£4,534	£4,059	£4,060	**0.0**	266	224	219	**-2.3**	2,137	1,516	1,512	**-0.2**	£18.52	**2.3**	£2.68	**0.2**
HERRING AMBIENT	£5,009	£5,680	£3,661	**-35.5**	733	887	524	**-40.9**	3,140	3,860	2,292	**-40.6**	£6.99	**9.1**	£1.60	**8.5**
MUSSELS AMBIENT	£1,573	£1,623	£1,788	**10.2**	161	164	177	**8.0**	1,034	1,060	1,168	**10.2**	£10.09	**2.0**	£1.53	**-0.1**
KIPPER AMBIENT	£1,672	£1,778	£1,744	**-1.9**	168	175	172	**-1.7**	1,037	1,084	1,066	**-1.6**	£10.11	**-0.2**	£1.64	**-0.3**
COD ROE AMBIENT	£1,250	£1,274	£1,269	**-0.4**	132	128	130	**1.2**	761	788	784	**-0.6**	£9.77	**-1.6**	£1.62	**0.2**
LUMPFISH ROE AMBIENT	£752	£836	£1,086	**29.9**	21	22	30	**31.7**	284	311	367	**18.0**	£36.68	**-1.4**	£2.96	**10.1**
OTHER AMBIENT	£1,184	£1,153	£997	**-13.5**	142	123	102	**-17.3**	527	509	446	**-12.4**	£9.77	**4.5**	£2.23	**-1.3**
COD AMBIENT	£675	£922	£904	**-2.0**	55	64	59	**-7.0**	205	255	246	**-3.4**	£15.30	**5.4**	£3.67	**1.5**
SILD AMBIENT	£797	£953	£799	**-16.2**	77	80	66	**-16.9**	633	718	602	**-16.1**	£12.05	**0.8**	£1.33	**-0.1**
SALMON ROE AMBIENT	£440	£508	£771	**51.8**	4	5	7	**55.2**	82	92	112	**21.9**	£106.80	**-2.2**	£6.87	**24.5**
CAVIAR AMBIENT	£560	£544	£627	**15.3**	13	12	13	**8.0**	153	140	126	**-10.1**	£49.62	**6.7**	£4.99	**28.2**
POLLOCK AMBIENT	£39	£277	£627	**126.9**	7	41	73	**78.8**	19	128	267	**108.3**	£8.62	**26.9**	£2.35	**8.9**
OCTOPUS AMBIENT	£280	£299	£528	**76.4**	24	30	37	**23.7**	150	181	235	**29.7**	£14.37	**42.6**	£2.25	**36.1**

The data shown in this section is sourced from NielsenIQ HomeScan, which is a panel within GB who record their purchases for in home consumption, and provides an overview of shopper trends, not absolute values.

Ambient seafood purchase KPIs

The latest KPIs show that 77% of the population (penetration), bought ambient seafood more than 9 times last year. On average each shopper bought 2, 437g packs for £1.36 per pack, every trip.

In comparison to 2020, all these measures declined except the number of packs bought by shoppers each trip which has increased 8.6%. However, when compared to pre-pandemic 2019 all measures have increased except penetration and the average price.

Ambient Seafood KPIs	Penetration 52w	Frequency of Purchase 52w	Value per Trip 52w	Volume Kg per Trip 52w	Packs per Trip 52w	Price pr Kg 52w	Price pr Pack 52w
July 2019	79	8.90	£2.62	0.419	1.80	£6.25	£1.46
July 2020	81	9.10	£2.74	0.440	1.85	£6.24	£1.48
July 2021	77	9.08	£2.73	0.437	2.01	£6.23	£1.36
2021 v 2019	**-2.5%**	**2.0%**	**4.0%**	**4.3%**	**11.7%**	**-0.2%**	**-6.9%**
2021 v 2020	**-4.7%**	**-0.2%**	**-0.6%**	**-0.5%**	**8.6%**	**0.0%**	**-8.5%**

Retailer performance

When compared to their market share of total seafood value, ambient seafood overperforms with five retailers: Tesco, Aldi, Asda, Lidl, and Farmfoods. The retailers with reported sales value growth were Lidl (+12%), Ocado (+19%), Farmfoods (+9%), and M&S (19%).

The ambient seafood shopper

To understand who is buying seafood it is useful to compare the amount of money spent by different groups to the overall seafood shopper. The top line profile is very similar with most ambient seafood being purchased by smaller, more affluent ABC1 households, that are over 45 years old, and include no children. However, ambient seafood does overperform with other shopper groups including less affluent, larger households that tend to be younger and contain children and families.

Purchase Value % Share of Trade 52w		Class AB	Class C1	**Class C2**	**Class D**	**Class E**	<2 Members	**>3 Members**
Total Seafood	July 1019	32.1	28.2	18.6	12.0	9.1	67.6	32.4
	July 2020	31.6	28.5	19.3	12.3	8.2	66.2	33.8
	July 2021	32.9	29.3	19.4	11.5	6.9	64.3	35.7
Ambient	July 1019	27.8	27.6	21.3	15.1	8.3	60.0	40.0
	July 2020	27.9	28.3	20.8	14.2	8.7	60.3	39.7
	July 2021	29.1	28.7	21.5	12.4	8.2	59.5	40.5

Purchase Value % Share of Trade 52w		**<35 Years**	**35 to 44 Years**	**45 to 64 Years**	>65 Years	**Children Yes**	Children No
Total Seafood	July 1019	11.1	14.6	35.3	39.0	20.7	79.3
	July 2020	11.8	14.1	36.4	37.8	21.8	78.2
	July 2021	11.1	14.8	36.5	37.5	22.6	77.4
Ambient	July 1019	14.4	17.3	37.5	30.8	27.1	72.9
	July 2020	15.2	15.8	38.0	31.0	26.5	73.5
	July 2021	14.4	16.6	38.2	30.8	26.3	73.7

Purchase Value % Share of Trade 52w		**Pre-Family**	**New Family**	**Maturing Families**	**Est. Families**	**Post Families**	Older Couples	Older Singles
Total Seafood	July 1019	5.9	4.4	10.4	8.1	15.7	37.5	18.1
	July 2020	6.2	4.3	10.8	8.9	15.4	36.6	17.9
	July 2021	5.8	4.7	10.9	9.3	15.7	36.7	17.1
Ambient	July 1019	6.8	5.4	14.4	9.9	16.8	32.0	14.6
	July 2020	7.7	5.0	13.3	10.8	16.2	31.6	15.3
	July 2021	7.6	5.0	12.8	11.1	16.9	31.8	14.7

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Notes:
Data source: NielsenIQ 17.07.21:
- ScanTrack – Total UK including Discounters
- HomeScan – GB (including discounters) consumer panel of 15,000 households

References: (%) values represent change from the previous year unless otherwise stated

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