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Ambient Seafood in Multiple Retail (2022)

A market insight analysis (20m read)

R. Watson

December 2022

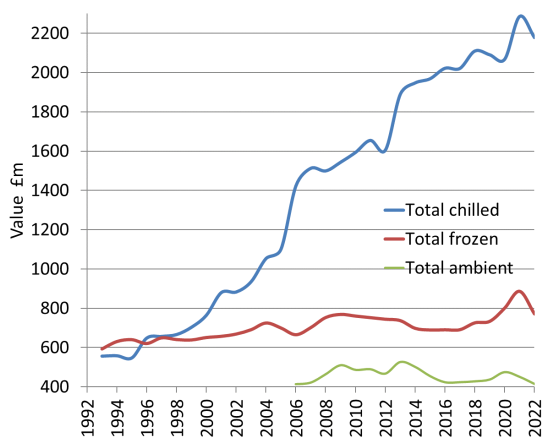
This factsheet provides a summary of the performance of ambient seafood in multiple retail to 8 October 2022

- **Ambient continues to take the smallest sector share of UK retail seafood category. In general decline until 2020, the COVID-19 epidemic briefly boosted ambient sales. But, after falling back into pre COVID-19 decline, pressure on personal finances in 2022 has once again seen ambient consumption increase.**
- **In the 52 wks. to 8 October 2022, ambient seafood took the smallest value share (13.4%, +0.5pp) and volume share (22.5%, +3pp) of the category, taking share from chilled and frozen. Ambient seafood was worth £546m (-0.3%) with a volume of 91,871 tonnes (+9.1%); and an average price of £6.10/kg (-8.8%).**
- **Ambient seafood now has only two segments, 'ambient prepared' which is predominantly made up of traditional tinned fish in brine 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.**
- **In the 52 wks. to 8 October 2022, fewer shoppers bought ambient seafood more often with a smaller basket size. On average, ambient shoppers bought 0.43kg of ambient fish per trip spending £6.16; buying chilled seafood 9.0 times per year, spending a total of £24.06, 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 of under 35 and 35 to 44.**
- **Compared to 2016, ambient seafood has attracted significantly more affluent C1 shoppers; perhaps driven by sales of 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 larger 'greater than five-person households', and a polarization increasing both the youngest and oldest demographic.**
- **Tuna continues to dominate the ambient seafood sector, taking 67% (+0.6pp) of all ambient seafood sales by value, of the top 10 ambient species, and is growing share. This year, mackerel displaced salmon to become as the second most valuable ambient species, selling double the amount of ambient salmon by volume.**

Historic retail seafood sector trends

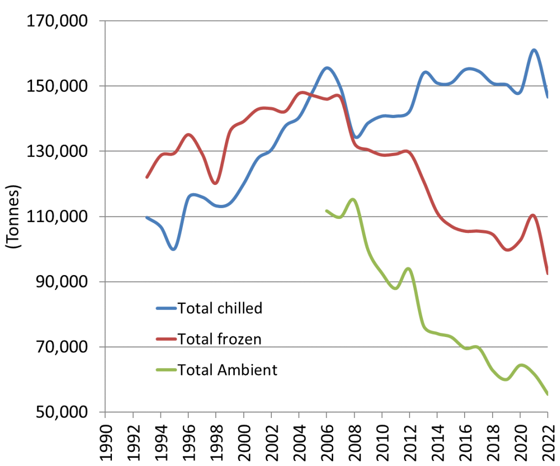
Over the past 20 years, Chilled seafood was also the only sector to grow from 2008 onwards through recession. But in 2020, the COVID-19 epidemic triggered panic buying, working from home, and school closures which had the effect of boosting all sectors including ambient and frozen. By the end of 2022, any increased retail seafood consumption boost from COVID-19 sales had gone, with all sectors falling back to pre-COVID-19 decline. However, in response to concern over the Ukraine crisis and pressure on personal finances from inflation, shoppers have once again turned to ambient seafood to save money. Over the next 10 years if the predicted recession occurs, total seafood sales could fall a further 25-30%, and ambient volume sales could fall by a further -50%.

Long term GB seafood sector value trends



Nielsen GB Scantrack/TNS

Long term GB seafood sector volume trends



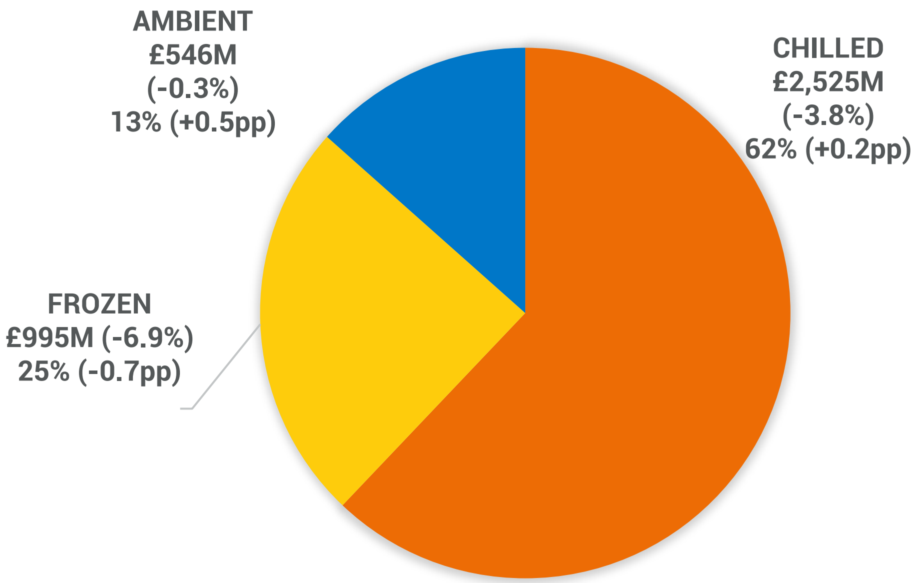
Nielsen GB Scantrack/TNS

Ambient seafood performance

Historically, the seafood sector experiencing the greatest decline, this year ambient is the only seafood sector to see strong volume growth (+9.3%), helped by significant drop in average price.

In the 52 wks. to 8 October 2022, ambient seafood took the smallest value share (13.4%, +0.5pp) and volume share (22.5%, +3pp) of the category, taking share from chilled and frozen. Ambient seafood was worth £546m (-0.3%) with a volume of 91,871 tonnes (+9.1%); and an average price of £6.10/kg (-8.8%).

UK seafood sector share by value 2022



Nielsen Scantrack YE 08.10.22

Ambient seafood KPIs

In the 52 wks. to 8 October 2022, fewer shoppers bought ambient seafood more often with a smaller basket size. On average, ambient shoppers bought 0.43kg of ambient fish per trip spending £6.16; buying chilled seafood 9.0 times per year, spending a total of £24.06, equating to 3.9kg over the year.

Ambient seafood KPIs 2022

		Pen %	Freq	AWOP (Kg) 52w	Avg. Spend (£) 52w	Trip Spend (£)	Price per Kg	Avg. Trip Kg
TOTAL SEAFOOD	09 OCT 2021	96.10	29.90	15.56	£146.85	£4.91	£9.44	0.52
	08 OCT 2022	95.50	28.90	14.53	£139.70	£4.83	£9.61	0.50
	% Change	-0.7	-3.3	-6.6	-4.9	-1.6	1.9	-3.4
CHILLED SEAFOOD	09 OCT 2021	81.90	20.10	8.16	£102.26	£5.09	£12.53	0.41
	08 OCT 2022	80.90	19.40	7.65	£97.98	£5.05	£12.80	0.39
	% Change	-1.2	-3.5	-6.3	-4.2	-0.7	2.2	-2.9
FROZEN SEAFOOD	09 OCT 2021	86.30	11.20	6.13	£44.86	£4.02	£7.31	0.55
	08 OCT 2022	84.10	10.40	5.62	£42.65	£4.12	£7.59	0.54
	% Change	-2.5	-7.1	-8.3	-4.9	2.3	3.7	-1.3
AMBIENT SEAFOOD	09 OCT 2021	76.40	9.00	3.91	£24.54	£2.72	£6.28	0.43
	08 OCT 2022	75.60	9.00	3.90	£24.06	£2.66	£6.16	0.43
	% Change	-1.1	0.3	-0.3	-2.0	-2.3	-1.9	-0.6

Nielsen Homescan YE 08.10.22

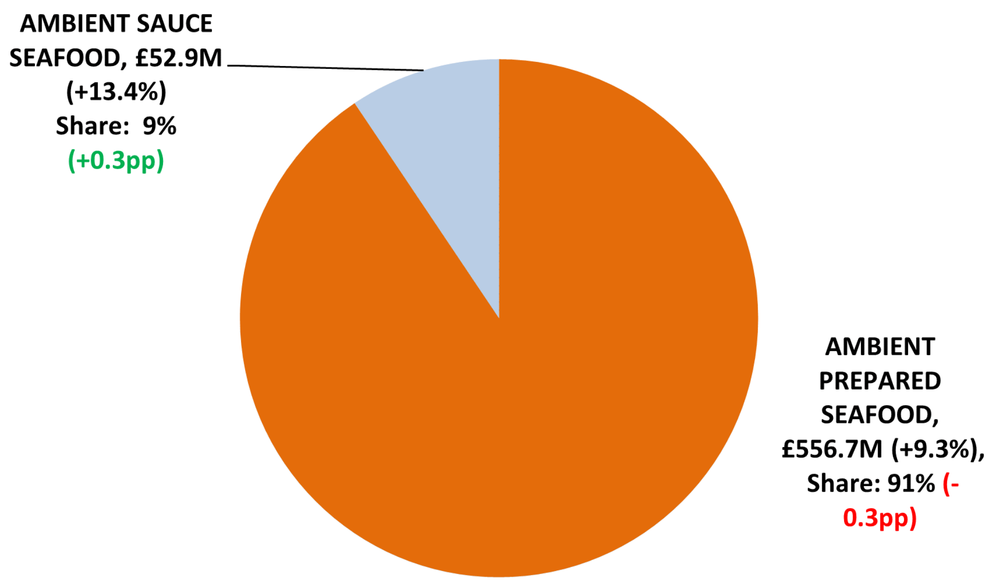
Ambient seafood segment performance

Ambient seafood now has only two segments, 'ambient prepared' which is predominantly made up of traditional tinned fish in brine 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 grew share by 1%, but saw a significant volume increase of over 10% compared to last year. In the 52wks to 8 October 2022 ambient prepared was worth £495m (-0.4%), with 80, 786 (+10.4%) tonnes and an average price of £6.13 (-9.8%).

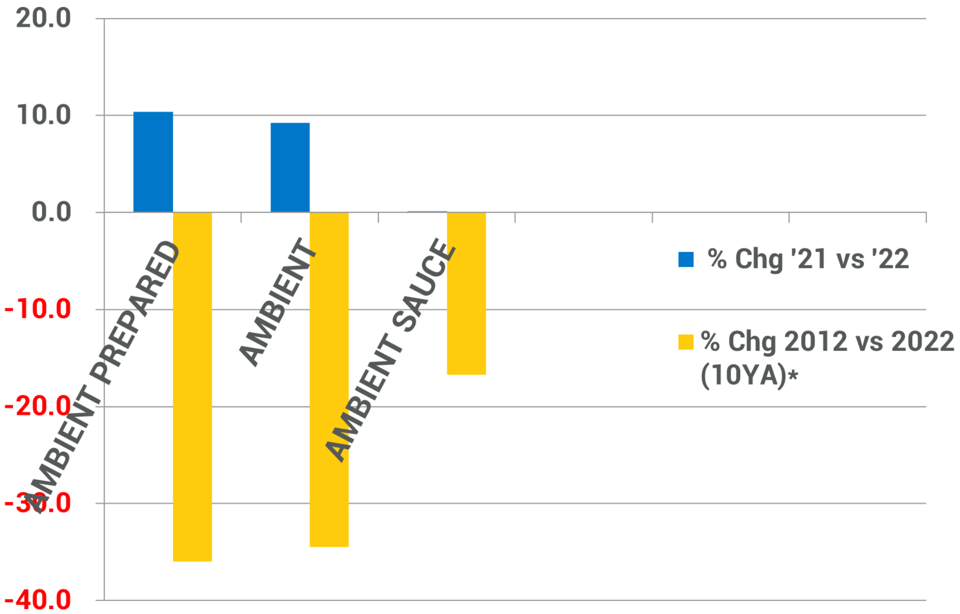
Both ambient prepared and ambient sauce sectors experienced heavy long term decline (10yrs to 8 October 2022). Ambient prepared showed the greatest consumption decline at -36%.

UK ambient seafood segment value share 2022



Nielsen Scantrack YE 08.10.22

Ambient seafood segment volume performance 2022



*Nielsen Scantrack YE 08.10.22 (*10yr GB)*

Ambient seafood segment performance to 2022

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2020 52wks to 08.10.20	2021 52wks to 08.10.21	2022 52wks to 08.10.22	% Chg. '21 vs '22	% Chg. 2012 vs 2022 (10YA) *	2020 52wks to 08.10.20	2021 52wks to 08.10.21	2022 52wks to 08.10.22	% Chg. '21 vs '22	% Chg. 2012 vs 2022 (10YA) *	Avg Price 2022	% Chg. '21 vs '22	% Chg. 2012 vs 2022 (10YA) *
FISH	4,080,280	4,242,649	4,065,887	-4.2	11.1	410,080	420,729	398,473	-5.3	-18.5	£10.20	1.2	36.3
FRESH	2,424,862	2,625,763	2,524,750	-3.9	24.5	182,153	194,659	179,670	-7.7	-1.7	£14.05	4.2	26.6
FROZEN	1,054,757	1,068,856	994,738	-6.9	0.9	142,098	144,095	129,235	-10.3	-27.5	£7.70	3.8	39.2
AMBIENT	600,661	548,030	546,400	-0.3	-19.3	85,830	81,974	89,568	9.3	-34.4	£6.10	-8.8	23.0
AMBIENT PREPARED	546,004	497,122	494,992	-0.4	-20.1	76,313	73,205	80,786	10.4	-36.0	£6.13	-9.8	24.7
AMBIENT SAUCE	54,656	50,908	51,408	1.0	-8.1	9,517	8,769	8,782	0.1	-16.7	£5.85	0.8	10.3

*Nielsen Scantrack YE 08.10.22 (*10yr GB)*

Ambient seafood species

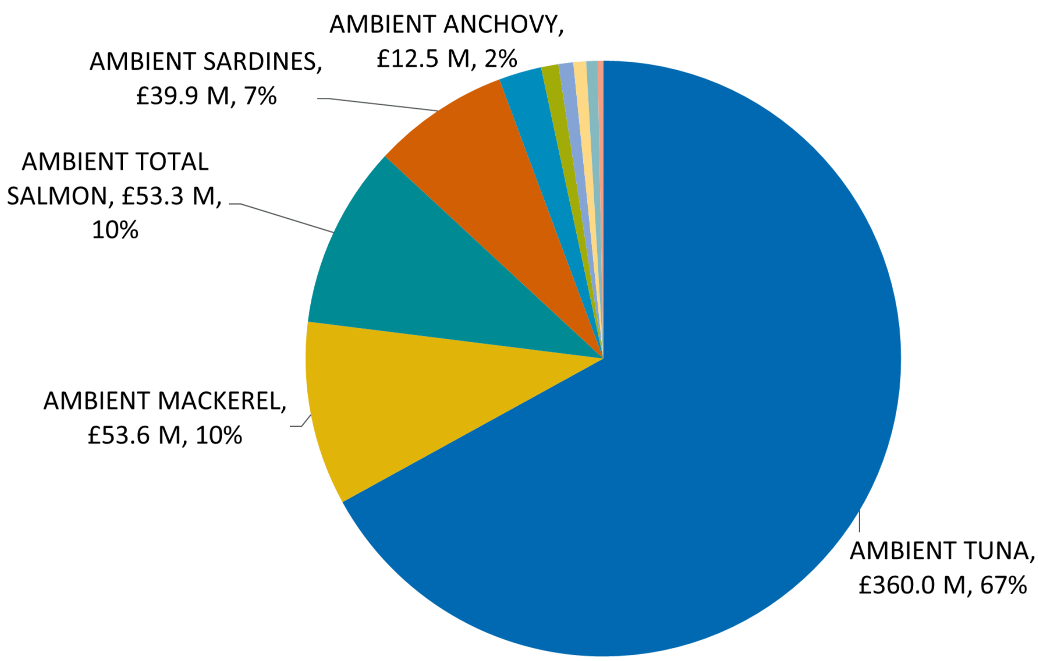
Tuna continues to dominate the ambient seafood sector, taking 67% (+0.6pp) of all ambient seafood sales by value, of the top 10 ambient species, and is growing share. Mackerel has displaced salmon to become as the second most valuable ambient species, selling double the amount of ambient salmon by volume.

Compared to last year, only tuna, sardines, pilchards, and herring out of the top 10 ambient species were in growth. Herring (+10.7%) showed the highest volume growth, whilst crab (-16.4%) showed the highest decline.

Many ambient species were in heavy volume decline over the long term (10yrs to 8 October 2022), some seeing a consumption decline of over 60%. Only ambient anchovy (+11.2%) saw a growth in consumption out of the of the top 10 ambient species.

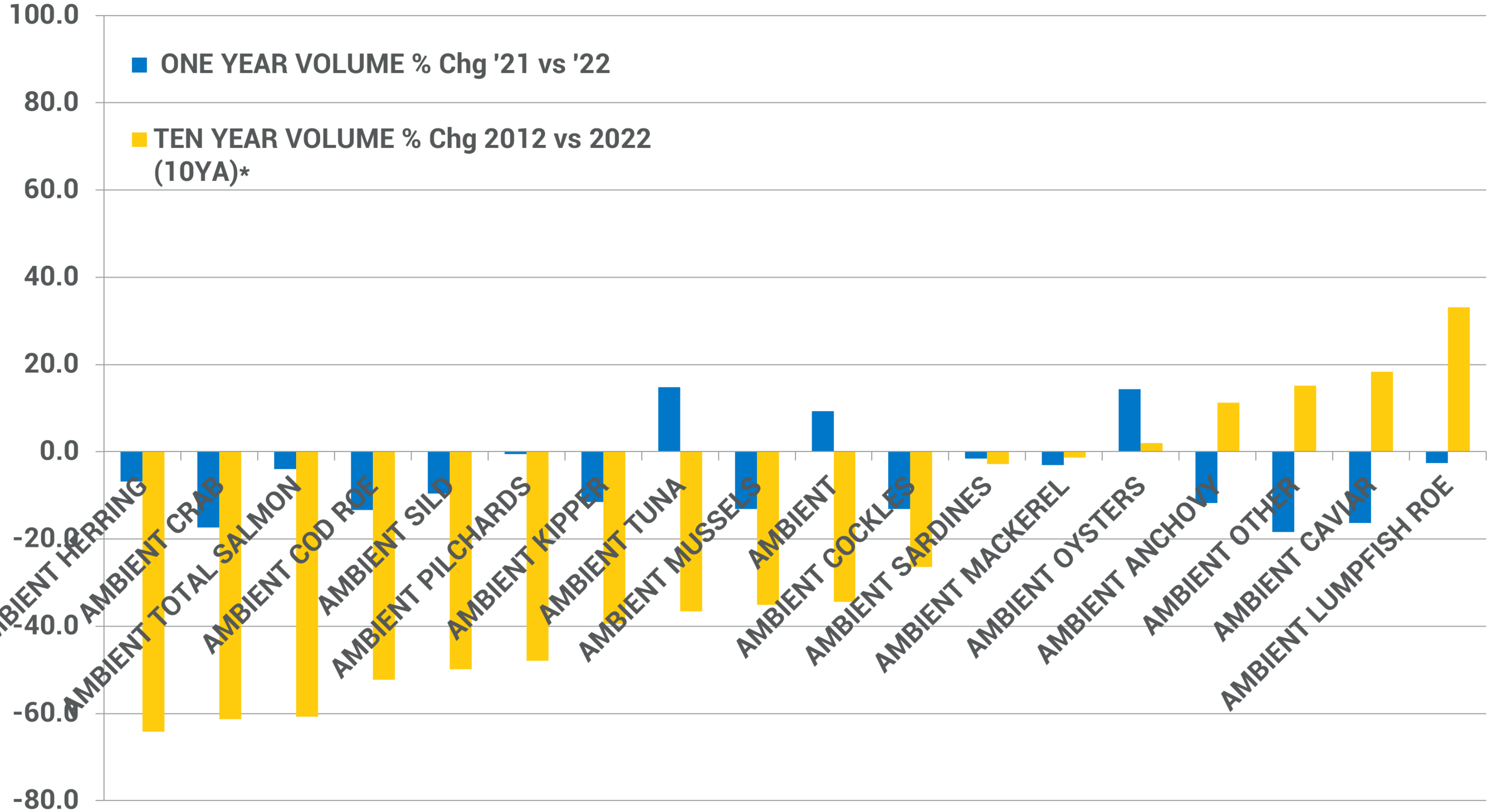
Over the past 10 years ambient seafood has experienced relatively modest inflation (+23%) compared to chilled (+26.6%) and frozen (+39.2%). of any seafood sector.

UK Ambient seafood species value share 2022



Nielsen Scantrack YE 08.10.22

Ambient seafood species volume performance 2022



Nielsen Scantrack YE 08.10.2022 (10yr GB)

Ambient seafood species performance to 2022

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2020 52wks to 08.10.20	2021 52wks to 08.10.21	2022 52wks to 08.10.22	% Chg. '21 vs '22	% Chg. 2012 vs 2022 (10YA) *	2020 52wks to 08.10.20	2021 52wks to 08.10.21	2022 52wks to 08.10.22	% Chg. '21 vs '22	% Chg. 2012 vs 2022 (10YA) *	Avg Price 2022	% Chg. '21 vs '22	% Chg. 2012 vs 2022 (10YA) *
FISH	4,080,280	4,242,649	4,065,887	-4.2	11.1	410,080	420,729	398,473	-5.3	-18.5	£10.20	1.2	36.3
FRESH	2,424,862	2,625,763	2,524,750	-3.9	24.5	182,153	194,659	179,670	-7.7	-1.7	£14.05	4.2	26.6
FROZEN	1,054,757	1,068,856	994,738	-6.9	0.9	142,098	144,095	129,235	-10.3	-27.5	£7.70	3.8	39.2
AMBIENT	600,661	548,030	546,400	-0.3	-19.3	85,830	81,974	89,568	9.3	-34.4	£6.10	-8.8	23.0
AMBIENT TUNA	394,089	356,977	360,030	0.9	-18.3	59,405	57,278	65,786	14.9	-36.6	£5.47	-12.2	28.8
AMBIENT MACKEREL	56,699	53,668	53,636	-0.1	-5.8	8,420	8,330	8,072	-3.1	-1.4	£6.64	3.1	-4.5
AMBIENT TOTAL SALMON	66,871	56,591	53,282	-5.9	-42.5	4,477	3,917	3,760	-4.0	-60.7	£14.17	-1.9	46.5
AMBIENT SARDINES	41,521	39,017	39,932	2.4	2.9	8,737	8,070	7,942	-1.6	-2.8	£5.03	4.0	5.9
AMBIENT ANCHOVY	11,951	12,879	12,473	-3.2	36.6	670	727	642	-11.8	11.2	£19.44	9.8	22.8
AMBIENT PILCHARDS	6,219	4,972	5,056	1.7	-41.0	1,974	1,540	1,532	-0.5	-47.9	£3.30	2.2	13.3
AMBIENT HERRING	4,071	3,901	4,317	10.7	-48.1	616	577	537	-6.8	-64.2	£8.04	18.8	45.0
AMBIENT COCKLES	4,051	3,958	3,722	-6.0	-9.5	407	399	346	-13.1	-26.4	£10.75	8.3	22.8
AMBIENT CRAB	4,099	3,945	3,299	-16.4	-40.9	211	196	162	-17.4	-61.4	£20.40	1.3	53.0
AMBIENT KIPPER	1,732	1,791	1,639	-8.5	-12.8	170	177	157	-11.5	-39.4	£10.45	3.4	44.0
AMBIENT MUSSELS	1,641	1,694	1,584	-6.5	-12.3	165	166	144	-13.2	-35.1	£11.00	7.7	35.0
AMBIENT LUMPFISH ROE	873	1,135	1,123	-1.1	52.6	22	30	29	-2.6	33.1	£39.01	1.6	14.7
AMBIENT COD ROE	1,295	1,219	1,090	-10.6	-37.9	131	124	107	-13.4	-52.3	£10.15	3.2	30.2
AMBIENT OTHER	1,126	968	914	-5.5	147.1	115	99	81	-18.3	15.2	£11.27	15.7	114.5
AMBIENT COD	960	880	784	-11.0	533.2	63	57	49	-15.5	399.8	£16.14	5.4	n/a

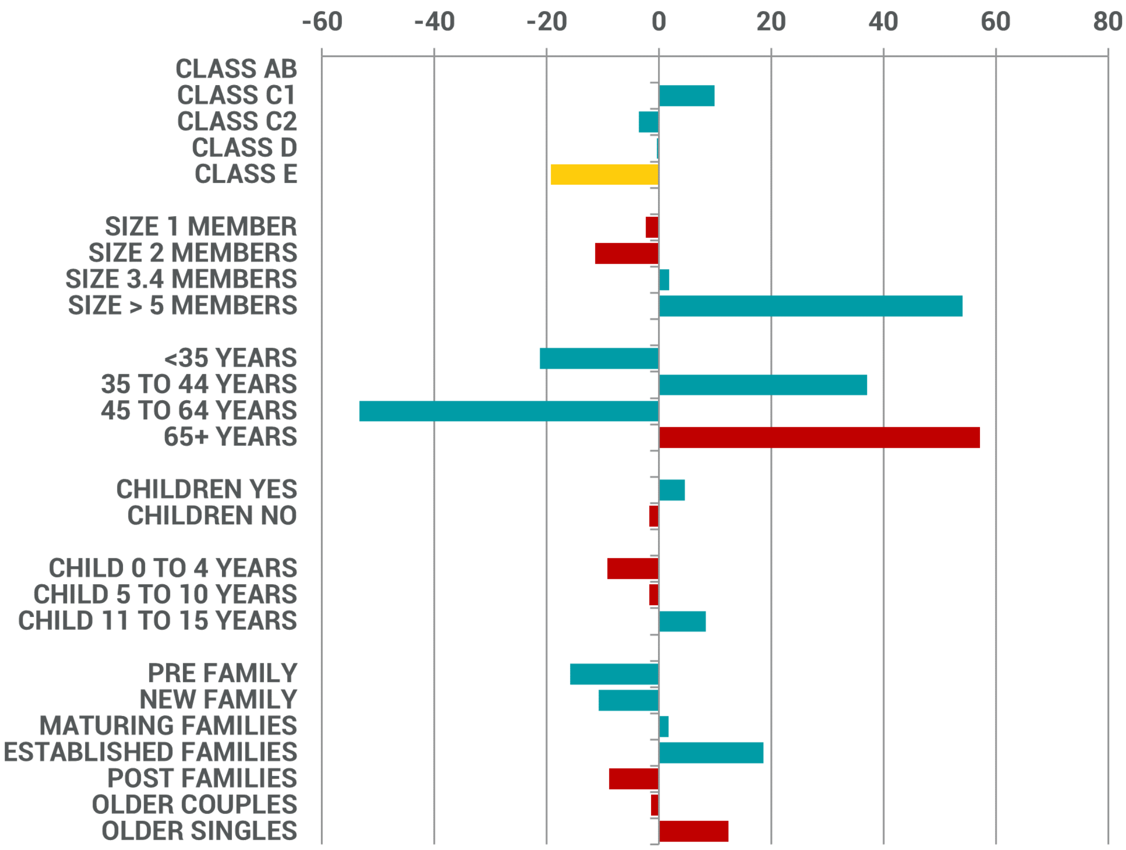
*Nielsen Scantrack YE 08.10.2022 (*10yr GB): 'Other 'is where the seafood species is not identified i.e., ' fish fingers' or*

The ambient seafood shopper

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 of under 35 and 35 to 44 shoppers, with less 65+ shoppers. Predominantly purchased by two-person households and medium sized households without children present. Where children are present, they are typically aged up to 10 yrs.

Compared to 2016, ambient seafood has attracted significantly more affluent C1 shoppers; perhaps driven by sales of 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 larger 'greater than 5 person households', and a polarisation increasing both the youngest and oldest demographic. Ambient seafood also saw an increase in purchases from families with children, an increase in the 11-15 year old age group, and established families.

Change in ambient seafood Demographic 2022 vs 2016 (%)



Nielsen Homescan YE 08.10 22

Ambient seafood demographics share 2022 vs 2016

	TOTAL SEAFOOD (% Share)	% Chg.	CHILLED (% Share)	% Chg.	FROZEN (% share)	% Chg.	AMBIENT (% Share)	% Chg.
CLASS AB	30.8	5.0	35.2	6.5	27.1	5.6	27.5	0.0
CLASS C1	29.9	8.6	30.1	10.0	29.2	6.1	30.4	9.9
CLASS C2	19.6	-4.5	17.5	-2.8	21.2	-6.9	21.4	-3.6
CLASS D	12.2	9.8	10.6	13.3	14.0	12.9	12.8	-0.4
CLASS E	7.5	-34.7	6.7	-45.9	8.4	-27.2	7.9	-19.2
SIZE 1 MEMBER	22.8	-3.6	25.6	-7.8	19.9	3.2	21.5	-2.3
SIZE 2 MEMBERS	37.4	-11.2	40.4	-12.2	35.5	-9.6	34.2	-11.4
SIZE 3.4 MEMBERS	29.1	3.8	24.7	9.1	33.1	0.5	32.0	1.8
SIZE > 5 MEMBERS	10.7	71.6	9.4	155.1	11.5	35.0	12.3	54.0
<35 YEARS	9.9	-14.5	8.6	-7.0	10.7	-17.7	11.2	-21.2
35 TO 44 YEARS	24.6	52.3	23.8	73.1	24.9	40.5	25.5	37.1
45 TO 64 YEARS	15.9	-56.1	12.9	-61.9	18.4	-51.6	17.8	-53.3
65+ YEARS	49.6	37.7	54.7	27.0	46.0	47.1	45.5	57.1
CHILDREN YES	24.3	7.5	19.1	20.3	28.6	-0.1	28.2	4.6
CHILDREN NO	75.7	-2.2	80.9	-3.8	71.4	0.1	71.8	-1.7
CHILD 0 TO 4 YEARS	24.0	-5.5	25.2	-3.4	23.9	-5.5	22.7	-9.2
CHILD 5 TO 10 YEARS	38.5	-3.9	37.5	-5.4	39.2	-3.7	38.7	-1.7
CHILD 11 TO 15 YEARS	37.5	8.6	37.3	8.7	36.9	8.5	38.6	8.3
PRE FAMILY	5.1	-13.7	5.3	-8.2	4.3	-20.0	5.9	-15.8
NEW FAMILY	4.6	-1.3	4.2	21.2	4.9	-13.5	4.9	-10.7
MATURING FAMILIES	12.4	3.3	9.2	13.2	15.2	-2.6	14.8	1.7
ESTABLISHED FAMILIES	10.0	19.0	8.1	24.1	11.4	14.8	11.5	18.6
POST FAMILIES	15.1	-9.1	14.3	-12.1	15.0	-5.5	16.8	-8.8
OLDER COUPLES	35.7	-1.1	39.1	-1.8	34.3	0.2	31.0	-1.4
OLDER SINGLES	17.1	4.9	19.9	-1.1	14.8	12.2	15.2	12.4

Nielsen Homescan YE 08.10 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 - GB EPOS excludes discounters.
Homescan – GB (including discounters) consumer panel of 15,000 households excludes seafood sandwiches.
Defra Family Food Survey 2018/19.

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