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

seafish

Haddock 2024

This Market Insight factsheet intends to provide the United Kingdom (UK) seafood industry a summary of the of haddock in the retail, foodservice and trade sectors.

21/01/2024 Suzi Pegg-Darlison (15-minute read)

Contents

Factsheet overview

This Market Insight factsheet intends to provide the United Kingdom (UK) seafood industry a summary of haddock in the retail, foodservice and trade sectors.

Consumer preferences are constantly changing with several factors playing a role in purchasing decisions. Understanding this and having insights into the seafood market and its role in the retail, foodservice and trade sectors, can help to run a successful seafood business.

Top takeaways

Haddock remains a popular species in the UK purchased by consumers in and out of home. It's the fifth most imported species by volume, the 8th most popular seafood species by volume sales in retail and is 9% of all seafood servings in foodservice.

UK trade and supply

The fifth most imported species by volume, 8.5% of all seafood imports are haddock. In terms of volume, most imports were from Norway and most exports were to France. Volume of imports and exports of haddock has experienced year on year declines in 2022.

UK retail

Worth £225m, haddock is 5% of the total seafood sales and the eighth most purchased species in terms of volume, 18,825 tonnes, seeing year on year value (-0.3%) and volume (-13.5%) declines.

GB foodservice

9% of all the seafood servings out of home are haddock. Overall, it was a good year to September 2023 for haddock with servings up 5% on the previous year end. Haddock is usually purchased in a fried format in the Fish and Chip Shop channel.

UK trade and supply

The following sections provide details of total haddock imports and exports; comparing provisional HMRC data from 2022 to finalised data of 2021.

Allocating trade statistics to a single species is not always possible, statistics presented in this report should be interpreted with caution. The extent of haddock trade available can be found below in the trade data notes and limitations section.

Landings

In 2022 total UK landings by UK vessels value in 2022 was £738.3 million, an increase of +6.7% compared to 2021 with 5.4% of this value came from haddock.

Haddock was the main demersal fish landed into the UK by UK vessels by volume and represented 28.2% of all demersal landed volume, an increase of 5.4 percentage points (pp) compared to 2021. By value haddock landings represent 14.3% of all demersal landings, no change on 2021 (0.0 pp).

In total, 32,732 tonnes of haddock were landed into the UK, by UK vessels. This was a 31.0% increase on 2021 volumes. Haddock landings value to UK ports by UK vessels in 2022 was £40.2 million, an increase of +14.1% compared to 2021.

Imports

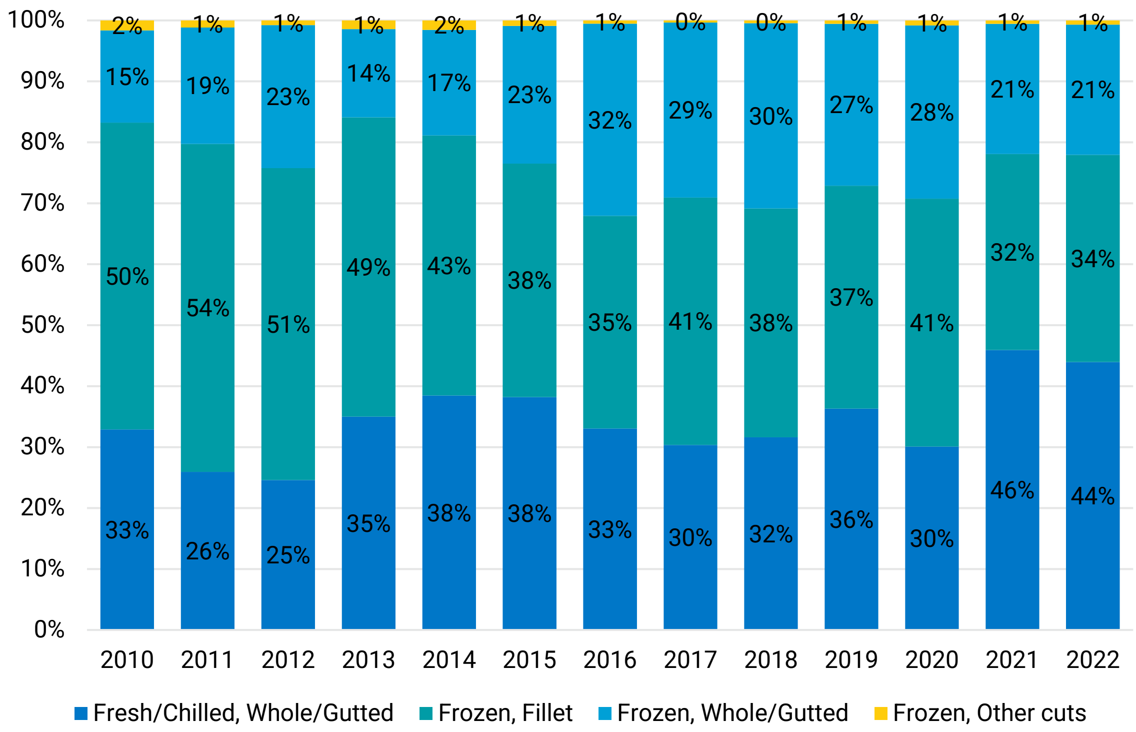
Most haddock available in the UK for domestic consumption are imported from other countries.

In 2022, 6.5% of the overall value of total seafood imports to the UK were from haddock, no change (0.0 pp) from 2021. Haddock made up 8.5% of the overall volume of total seafood import to the UK, a decrease of 0.8 percentage points.

The total value of haddock imported to the UK in 2022 was £234.1 million, an increase of £36.0 million (+18.2%) compared to 2021. This growth was price led as the volume imported decreased by 6,714 tonnes (-10.9%) to 54,720 tonnes. The average price of imported haddock increased by £1.05/kg (+32.7%) between 2021 and 2022, experiencing higher price inflation than the average imported seafood product.

By volume, almost half of all haddock is imported chilled which experienced declined of 14.8%. The chart below shows share of haddock by format imported.

Chart 1. UK haddock import volume by format in 2010 to 2022.



Almost half of all haddock imports were from Norway, and 90% were from the top five countries of consignment as listed below in table 1. This shows more details of the top five exporting countries by import volume of haddock.

Table 1. Imports to the UK of haddock by exporting country (Top five)

Rank	Exporting Country	Volume (tonnes)		Growth (year on year)		Share of Total Haddock Import
		2021	2022	Percentage	Actual (tonnes)	
1	Norway	24,077	24,229	+0.6%	+152	44%
2	Iceland	13,716	10,011	-27.0%	-3,705	18%
3	China	6,746	6,976	+3.4%	+229	13%
4	Faroe Islands	5,175	5,588	+8.0%	+414	10%
5	Russia	3,109	2,470	-20.5%	-639	5%
	Grand Total	**52,825**	**49,276**	**-0.1%**	**-3,548**	

Haddock was the fifth most imported species of seafood imported to the UK with species such as tuna, salmon, cod and shrimp and prawns, being imported in higher volumes. Except for tuna all these imported species experienced volume declines in 2022.

Exports

In 2022 0.2% of the total exported seafood volume was from haddock and 0.1% of the overall value of total seafood exports from the UK were from haddock, a decrease of 0.1 and 0.1 percentage points respectively compared to 2021.
769 tonnes of haddock were exported from the UK to other countries, worth £1.7m. This is a decline of 248 tonnes (-24.4%) and £1.4m (-44.3%) less haddock exported in 2022.

This may be an underestimation of total haddock export as we are missing the volume of fresh haddock fillets exported. Further details in data notes and limitations section below.

Almost half of all haddock exports were to France, with 95% from the top five destination countries as listed below in table 1. This shows more details of the top five importing countries by export volume of haddock.

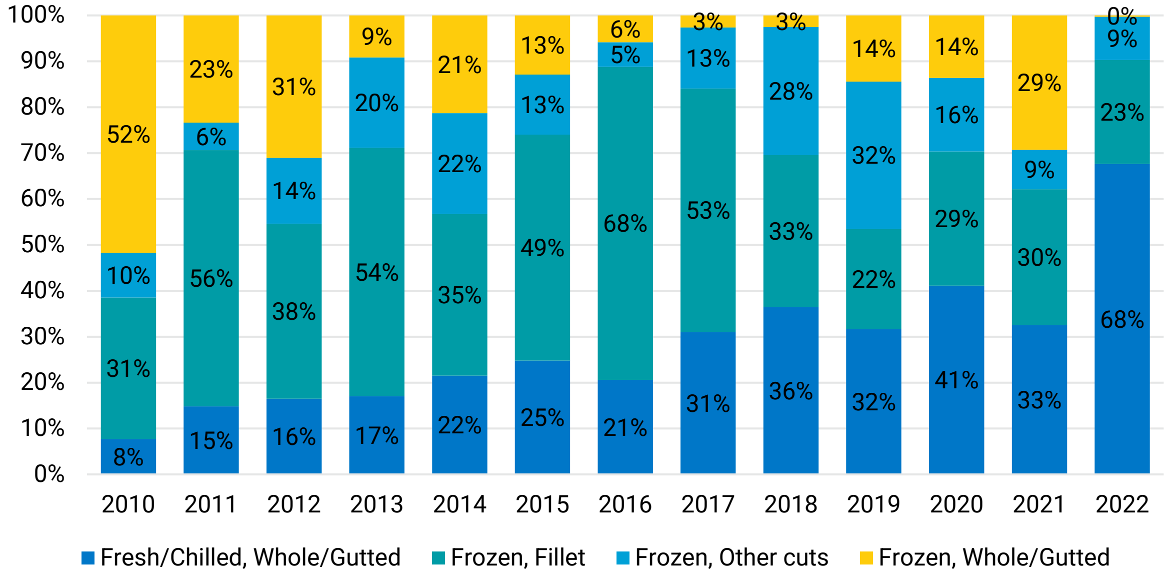
Table 2. Exports from the UK of haddock by destination country (Top five)

Rank	Destination Country	Volume (tonnes)		Growth (year on year)		Share of Total Haddock Exports
		2021	2022	Percentage	Actual (tonnes)	
1	France	257	345	+33.9%	87	45%
2	Irish Republic	89	236	+166.2%	147	31%
3	Poland	41	72	+76.5%	31	9%
4	Netherlands	49	53	+9.4%	5	7%
5	Spain	20	22	+8.9%	2	3%
	Grand Total	**456**	**729**	**+59.7%**	**272**	

Of all the species exported from the UK, haddock ranked thirty fifth in terms of volume. The top five exported species included salmon, mackerel, herring, other marine fish, and other products. Except for salmon and other products, all species experienced year on year growth.

Over two-thirds of all haddock volume is exported chilled which experienced growth of +157.0%. The chart below shows share of haddock by format exported.

Chart 2. Haddock export volume from the UK by format in 2010 to 2022.



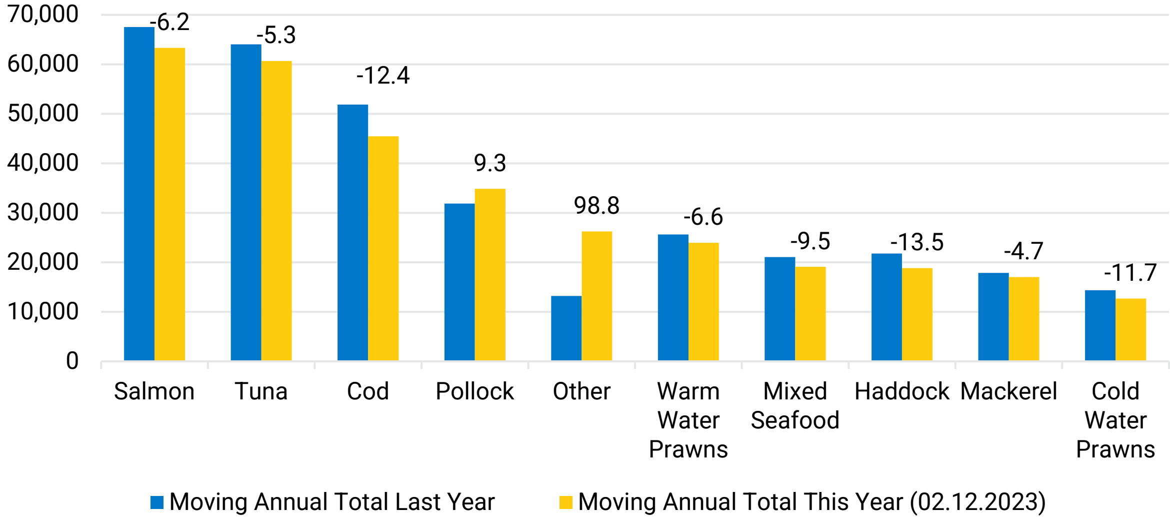
UK retail sector

Haddock is a white fish species that is popular with UK consumers when purchasing seafood in the retail sector. This section provides details of consumer purchases of haddock in the retail market including haddock shopper profiles.

Haddock sales in retail

By volume, haddock was the eighth bestselling fish of all seafood species sold in retail, with 5% of all seafood volume sales in retail is to haddock. UK shoppers purchased just over 18,825 tonnes of haddock equating to a retail value of £225.9m over the 52 weeks ending 2nd December 2023. Despite a 15.3% increase in price per kg, sales of haddock are in year-on-year decline in retail (value -0.3% and volume -13.5%).

Chart 3. Volume sales (tonnes) of the Top 10 species in retail with volume percentage growth (%) to 52 week ending 2nd December 2023.



Sales by sector

Two-thirds of haddock volume sales are purchased in a chilled format with one-third being frozen. There were no ambient sales of haddock in retail in the 52 weeks to 2nd December 2023.

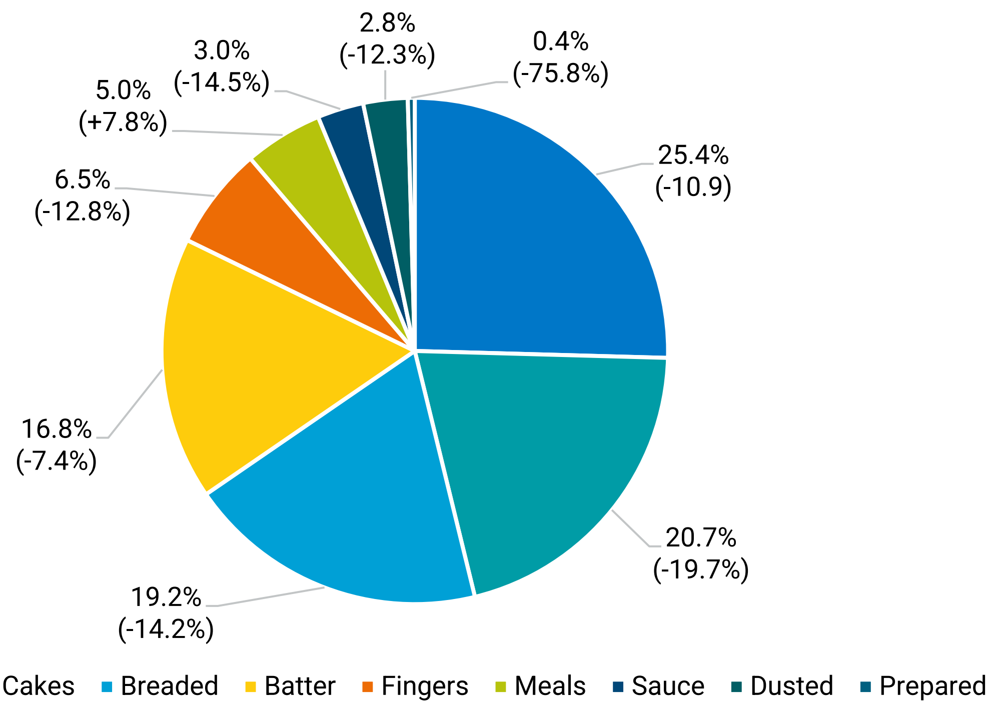
Volume sales of haddock experienced declines in both the chilled (-9.6%) and frozen (-20.3%) sectors compared to the same period in 2022. In terms of value, frozen experienced declines of 5.3% with chilled haddock in 2.0% price driven growth.

Sales by segment

Haddock is sold in nine product formats in retail known as segments; natural, cakes, breaded, batter, fingers, meals, sauce, dusted, prepared. There were no sushi sales of haddock in the 52 weeks to 2nd December 2023.

Of the nine segments natural has the largest share of haddock volume sales at 25.4%. Meals is the only segment experiencing volume growth of 7.8% all other segments are experiencing declines. Chart 4 below illustrates the volume share of haddock by each segment with year-on-year growth.

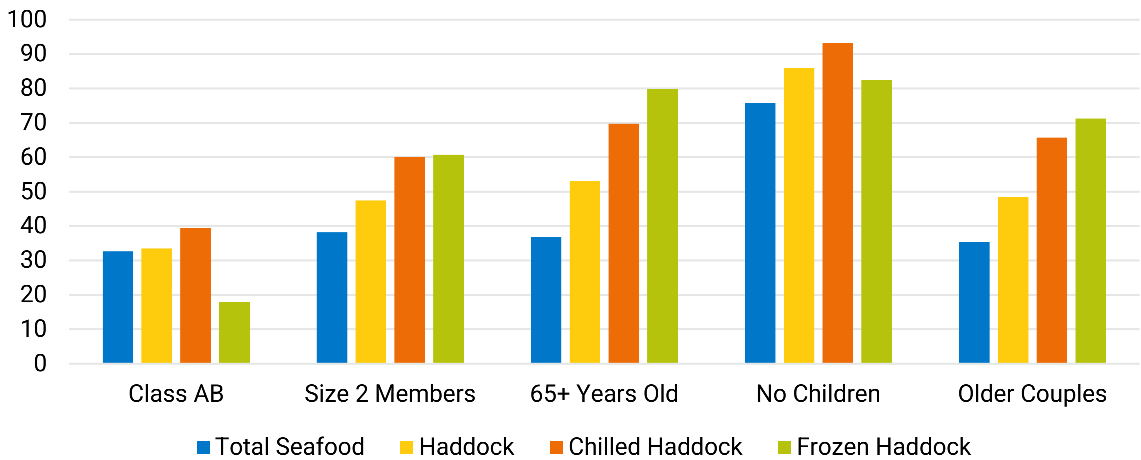
Chart 4. Volume sales share of haddock in retail by segment with volume percentage growth (%) to 52 week ending 2nd December 2023.



The haddock shopper (GB)

When comparing with the overall seafood shopper profile, the haddock shopper is quite distinct. They are more affluent, from smaller households, are older and tend not to have children. Chart 5 below shows the haddock shopper demographics by sector with clear differences between the chilled and frozen haddock shopper by purchase volume.

Chart 5. Purchase volume share of trade for each demographic across haddock and by chilled and frozen to 52 week ending 2nd December 2023.



Overall frequency of purchases declined with less householders buying haddock and buying less volume.

GB Foodservice

Haddock is a popular species with GB consumers when eating Out of Home. This section provides details of consumer purchases of haddock Out of Home including haddock consumer demographics.

When eating Out of Home, diners purchase haddock in a range of formats and across six different channels. However, most commonly haddock will be sold in a fried format from the Fish and Chip Shop channel.

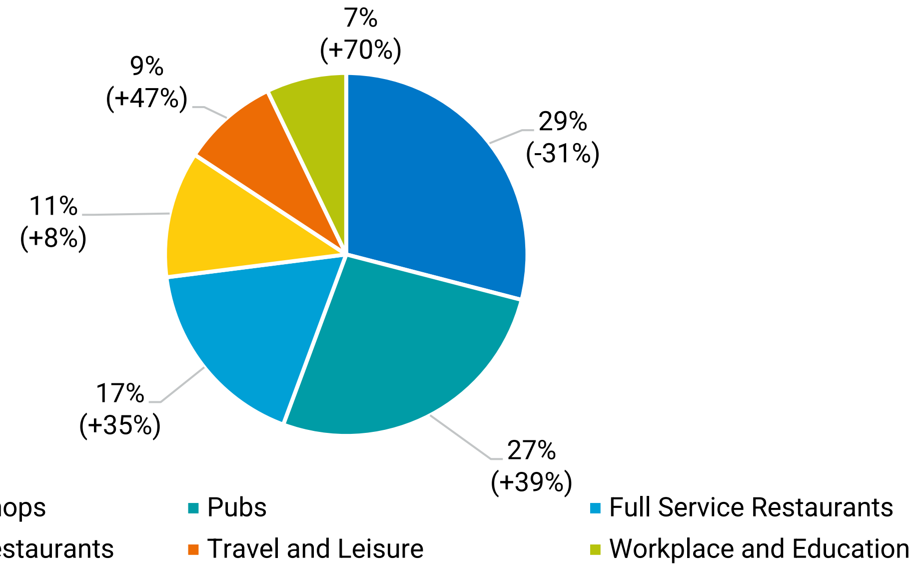
Total performance and channel performance

Of the total seafood servings Out of Home (977m servings), haddock account for 9% (89m servings), approximately 12,490 tonnes*. Overall, it was a good year to September 2023 for haddock with servings up 5% on the previous year.

**Tonnes is an estimation calculated by the total number of servings sold multiplied by 140g, the recommended serving size of seafood.*

Almost one-third of all haddock servings is sold through the Fish and Chip Shop channel (29%), this is followed by Pubs (27%), Full-Service Restaurants (17%), Quick Service Restaurants (11%), Travel and Leisure (9%) and Workplace and Education (7%). Servings growth was seen across all the channels except for Fish and Chip Shops, as illustrated in chart 6 below.

Chart 6. Servings share of haddock by GB foodservice channel with servings growth (%) to 12 months year end September 2023.



Consumer demographics and motivations

Haddock appeals more to an affluent consumer with over half of all haddock servings Out of Home being to those over fifty years of age. This is particular the case in pubs where over 74% of all servings are to those fifty and over.

Haddock appeals slightly more to male consumers especially at Quick Service Restaurants, however in pubs over two-thirds of haddock servings are to women.

It is most likely consumed on adult only occasions, especially at Pubs with servings usually occurring during dinner, especially at Quick Service Restaurants being most popular on Fridays and Saturdays. It has an opportunity to appeal to families with weekdays providing a good growth opportunity too.

Consumers turn to haddock during a social occasion, especially at Pubs. There is an opportunity to be seen as a more treating food type.

Sources

Data sources: (%) values represent changes from the previous year unless otherwise stated.

Resources used in the production of this factsheet can be viewed below.

NielsenIQ (NIQ) retail data to 52 week ending 2nd December 2023:
- ScanTrack – UK EPOS from key retailers (including composite data from discounters Aldi, Lidl and Northern Ireland) excludes seafood sandwiches.
- HomeScan – GB (including discounters) consumer panel of 15,000 households excludes seafood sandwiches.

Circana foodservice data:
- Panel based data to year ending September 2023.

HMRC trade data**:
- Import, exports, and landing HMRC data provided by BTS data to year ending September 2022.

Additional data and insights used to produce this factsheet:
- Seafish, 2023, Seafood Segments in the Retail Market
- Seafish, 2023, Seafood Trends in Commercial Foodservice (2023 Update)
- Seafish, 2023, Latest Quarterly UK Seafood Trade Data

Are you interested in the data behind the insights? Individuals working for seafood businesses can register for the Market Insight Portal on Seafish.org and access the Retail, Foodservice, and Trade data and reports directly. Click here to register today.

***Trade data notes and limitations*
HMRC trade in goods statistics cover seafood products imported to and exported from UK ports and presented as 8-digit combined nomenclature commodity (CN8) codes. We process these statistics using the EUMOFA (EU Market Observatory for Fisheries and Aquaculture) methodology. This allows for analysis of the value and volume of main commercial species, species groups, preservation and presentation states traded with the UK by partner country. Published data is provisional for 18-months and subject to change over this time.

The species defined in trade statistics are defined based on CN8 commodity codes Some traded commodities may include products containing a variety of different species or groups of species, meaning that individual species can't be identified.

Fresh fillets of haddock are missing from this analysis, these products lack a unique 8-digit commodity code and are grouped with fresh fillets of "other groundfish" under 0304 4490. This commodity may include fresh fillets of haddock, hake and Alaska pollock.

For more information please contact:
Suzi Pegg-Darlison
Market Insight Analyst

T: (01472) 252358
E: suzi.pegg-darlison@seafish.co.uk

Seafish
Origin Way
Europarc
Grimsby
DN37 9TZ

www.seafish.org

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

seafish