

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



Seafood in retail during COVID-19 (March '21 Update)

This factsheet summarises the impact of COVID-19 on seafood retail
volume sales to March 27th, 2021

A market insight analysis

June 2021 – by Richard Watson

March 2020 – Seafood stockpiling

- Seafood stockpiling lasted 4 weeks in March 2020. At its peak, total seafood weekly volume sales grew by +58%, driven by strong demand in all sectors.
- Frozen seafood consumption briefly outstripped chilled for the first time since 2005.
- The largest increases were in ambient (+117%) and frozen (+74%), as shoppers prioritised cupboard and freezer staples.

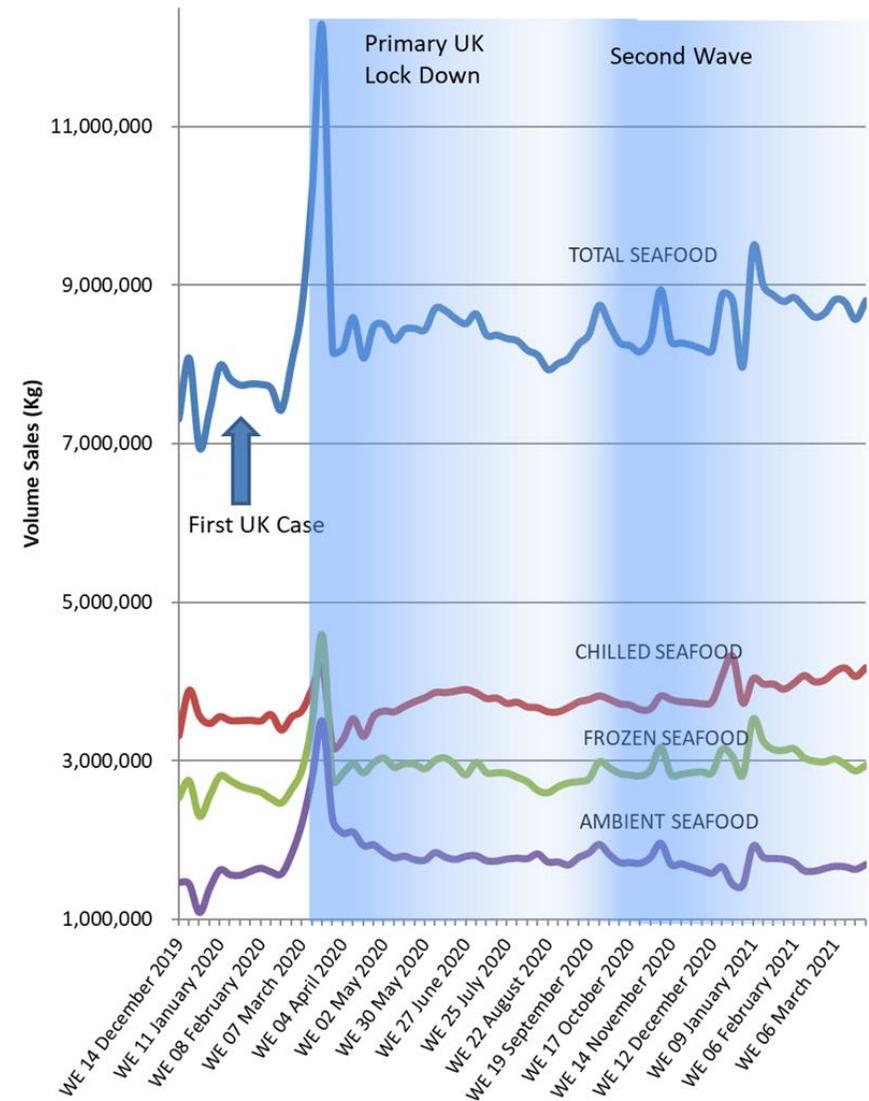
Summer 2020 – Frozen coated is king

- The additional sales from stockpiling quickly fell away but weekly seafood sales remained +12% up on the previous year.
- Sales of frozen seafood remained strong, up (+24% vs the previous year) with chilled seafood regaining ground quickly.
- Natural and frozen coated (breaded, battered) seafood performed strongly with more time for creative home cooking and more mouths to feed at home, demanding quick easy oven meal solutions.
- Species often enjoyed in foodservice such as lobster, scampi and langoustine also saw significant growth as foodservice outlets remained closed.

Autumn /Winter 2020 – Chilled returns to dominance

- Weekly seafood sales remained +12% up on the previous year.
- Frozen seafood momentum slowed, whilst weekly chilled seafood sales remained +18% higher than the previous year.
- A series of mini seafood sales spikes occurred as further lockdown and restrictions were introduced.
- Natural and coated seafood continued to thrive along with anchovy, langoustine, and octopus amongst the top performing species.

Weekly UK Retail Seafood Sales (Volume)



March 2021 – Total seafood performance snapshot

- Total seafood volume sales remain elevated as working from home continues, up +13.5% vs pre COVID-19 and +7.9% vs the same week the previous year.
- Volume growth is driven by chilled sales up +31.6% from the same week in 2020 compared to +7.3% for frozen.
- Ambient sales volumes also remain higher than before the pandemic but are slowing, -24.8% down on the vs the same week in 2020.

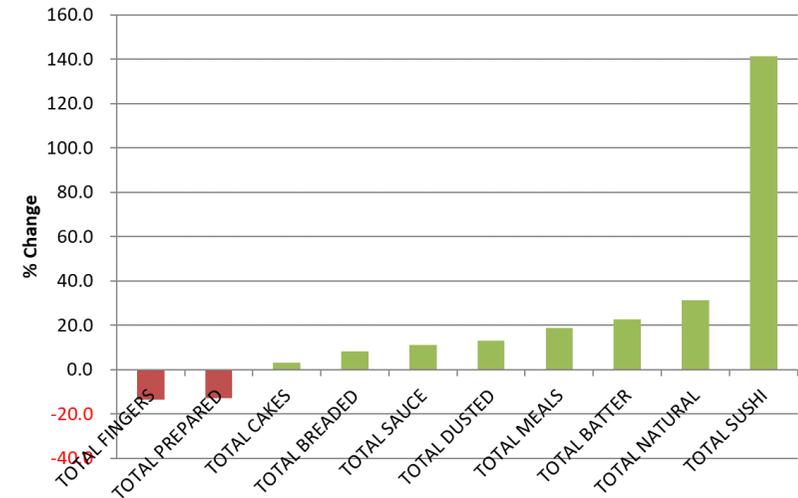
March 2021 –Segment performance snapshot

- Most segments showed double digit volume growth % vs the same week the previous year.
- Natural seafood retains momentum, whilst coated sales slow as the market moves back to pre-COVID-19 patterns.
- Only fingers and prepared seafood segments were in decline.
- The sushi segment showed the strongest growth +141%, as lockdown eases and partial return to office working boosts sales.

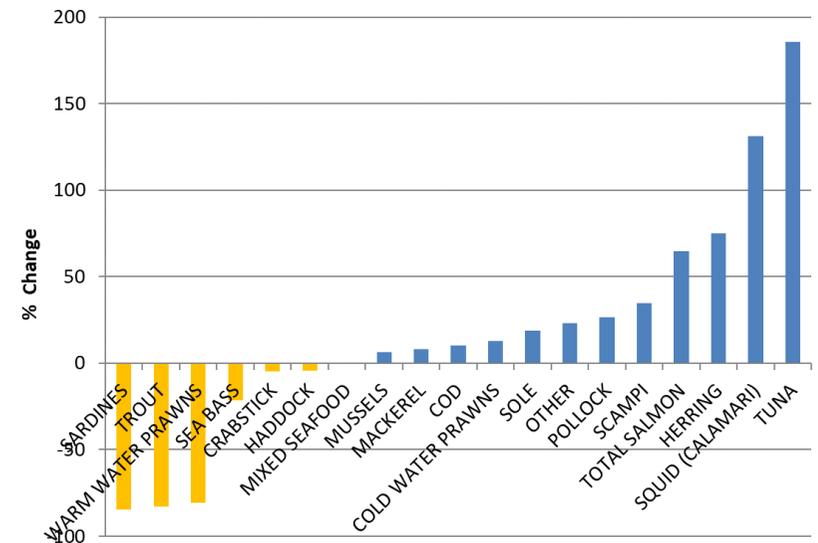
March 2021 – Species performance snapshot

- Salmon, herring, squid, and tuna showed the strongest weekly volume growth vs the same week in 2020.
- Traditionally strong performers, such as warm water prawns and sea bass, showed decline.
- Cod and haddock volume growth slowed in line with declining coated seafood sales.

Segment weekly volume sales 27.3.21 vs 27.3.20



Species weekly volume sales 27.3.21 vs 27.3.20



References: (%) 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
 - Homescan – GB (including discounters) consumer panel of 15,000 households excludes seafood sandwiches
- IGD Coronavirus (COVID-19) Weekly update 10th-23rd May'20

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The Seafish logo features the word "seafish" in a white, lowercase, sans-serif font. Above the letter "i" in "fish", there is a stylized graphic of a fish's head and scales, composed of several small, white, diamond-shaped elements arranged in a curved pattern.

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