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Chilled Seafood in Multiple Retail (2021)

A market insight analysis
(20m read)

November 2021 Richard Watson

This factsheet provides a summary of the performance of chilled seafood in multiple retail to 9th October 2021.

Key chilled facts/ Executive summary:

- Chilled seafood now takes over 60% of seafood category sales. The only sector in consistent long term growth since 2007, chilled was outperformed by frozen seafood in 2020. However, by mid 2021 chilled seafood had returned to driving the category.

- In the 52 wks. to 9th October 2021 the UK retail chilled seafood sector was worth £2.67bn (+8.0%) with a volume of 200,026 tonnes (+7.4%); and an average price of £13.27/kg (+0.6%).

- In 2021, chilled seafood recovered share lost to frozen and ambient taking a 61.3% (+2.1 percentage points (pp)) share of the category by value and 46.1% (+1.9pp) by volume.

- Chilled shoppers spent a record £102.10 pa on chilled seafood this year. In the 52 wks. to 9th October 2021, more shoppers bought chilled seafood more often with a larger basket size. On average, chilled shoppers bought 0.41kg of chilled fish per trip spending £5.09; buying chilled seafood 20.1 times per year, pending a total of £102.10, equating to 8.15kg over the year.

- Chilled seafood shoppers are predominantly older (45-64) couples and singles, in two person households without children present. Where children are present, they are typically aged 5-10 yrs. Compared to 10 years ago, over 30% of the lowest income shoppers traded out of chilled seafood, balanced by a substantial increase in middle income shoppers. There was also a significant shift to larger households with older children, purchasing chilled seafood.

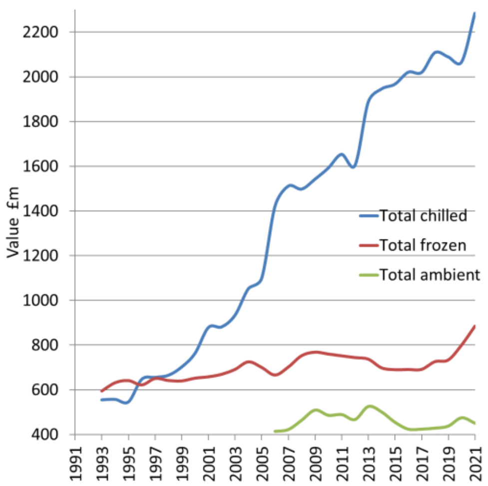
- Most chilled segments were in growth compared to last year apart from chilled cakes and dusted. Chilled sushi, sauce, batter and fingers showed the highest volume growth boosted by continued working from home and school closures and partial return to the workplace.

- Salmon continues to dominate chilled seafood sales increasing share to 46.6%. For the first time, last year, chilled warm water prawns 12.0% (+0.3pp) replaced cod as the second most valuable chilled species. This year, mixed seafood displaced haddock as the third most popular product by volume for the first time.

Historic retail seafood sector trends

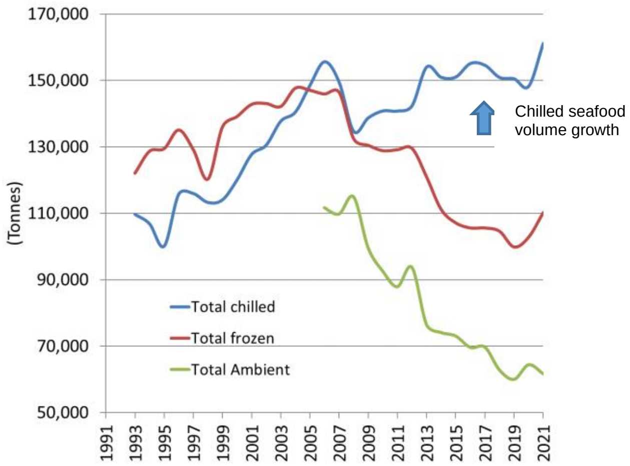
Over the past 20 years, chilled seafood has grown to dominate the category. In the late 1990s both the volume and value of chilled seafood began to grow faster than that of frozen and ambient seafood. By 2005, chilled seafood had overtaken frozen seafood volume sales, despite a much higher average price. Chilled was also the only seafood sector to grow from 2008 onwards through recession. In 2020 the COVID-19 epidemic triggered panic buying, working from home and school closures which had the effect of boosting all sectors, and increasing weekly chilled seafood sales by up to +19%.

Long Term GB Seafood Sector Value Trends.



Nielsen GB Scantrack/TNS

Long Term GB Seafood Sector Volume Trends.

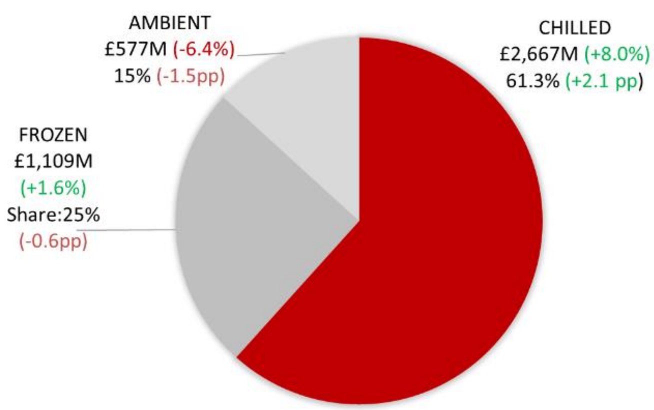


Chilled seafood performance

Historically the only seafood segment in volume growth, chilled seafood lost share to frozen and ambient in 2020 as COVID changed shopping patterns, but regained its momentum in 2021. Chilled now takes over 60% of the seafood category increasing share to 61.3% (+2.1pp), taking share from both frozen and ambient. In the 52 wks. to 9rd October 2021, chilled seafood was worth £2.67bn (+8.0%) with a volume of 200,026 tonnes (+7.4%); and an average price of £13.27/kg (+0.6%).

Over the long term (10 years to 9th October 2020), chilled seafood remained he only seafood sector in growth, with value up +39.2% and volume up by +13.6% whilst average price per kg increased by +22.6%.

UK seafood sector share by value 2021



Nielsen Scantrack YE 09.10.21

Chilled seafood KPI's

In the 52 wks. to 9th October 2021, fewer shoppers bought chilled seafood more often with a larger basket size. On average, chilled shoppers bought 0.41kg of chilled fish per trip spending £5.09; buying chilled seafood 20.1 times per year, spending a total of £102.10, equating to 8.15kg over the year.

Chilled seafood KPI's 2021

		Pen %	Freq	AWOP (Kg) 52w	Avg Spend (£) 52w	Trip Spend (£)	Price per Kg	Avg Trip Kg
TOTAL SEAFOOD	05-Oct-20	96.70	29.60	15.38	140.92	4.76	9.16	0.52
	03-Oct-21	96.10	29.90	15.56	146.61	4.90	9.42	0.52
	% Change	-0.5	0.9	1.2	4.0	3.1	2.8	0.2
CHILLED SEAFOOD	05-Oct-20	82.00	19.20	7.74	94.94	4.96	12.27	0.40
	03-Oct-21	81.90	20.10	8.15	102.10	5.09	12.53	0.41
	% Change	-0.1	4.7	5.3	7.5	2.7	2.1	0.6
FROZEN SEAFOOD	05-Oct-20	87.10	11.10	6.05	43.74	3.95	7.23	0.55
	03-Oct-21	86.30	11.20	6.12	44.75	4.01	7.31	0.55
	% Change	-0.9	0.7	1.2	2.3	1.6	1.2	0.4
AMBIENT SEAFOOD	05-Oct-20	80.10	9.20	4.06	25.34	2.76	6.24	0.44
	03-Oct-21	76.40	9.00	3.94	24.54	2.71	6.23	0.44
	% Change	-4.6	-1.6	-3.0	-3.1	-1.5	-0.1	-1.3

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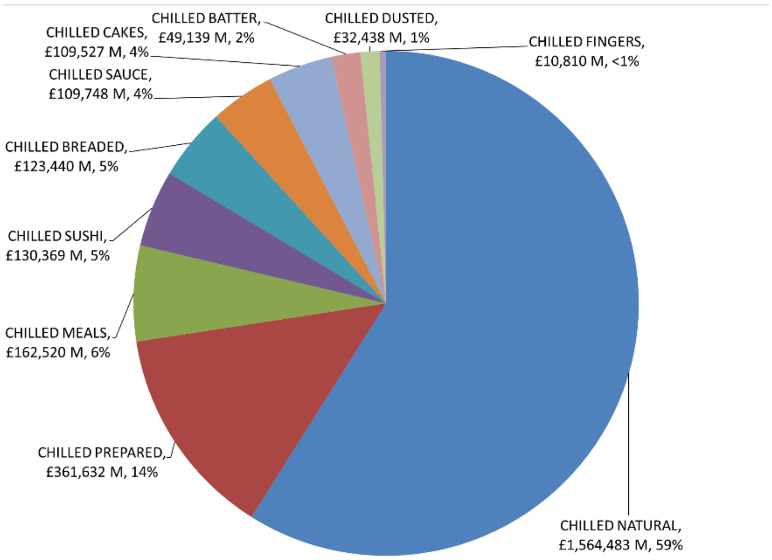
Chilled seafood segment performance

The chilled natural segment (i.e., seafood with no additional ingredients), continues to take the largest share of the chilled seafood sector with 59%, whilst continuing to grow volume share. In the 52wks to 9th October 2021 chilled natural was worth £1.56bn (+5.5%), with 95,783 (+8.0%) tonnes.

Most chilled segments were in growth compared to last year apart from chilled cakes and dusted. Chilled sushi, sauce, batter and fingers showed the highest volume growth boosted by continued working from home and school closures. A partial return to office helped boost chilled sushi (+42.1%) in line with increasing work lunch traffic.

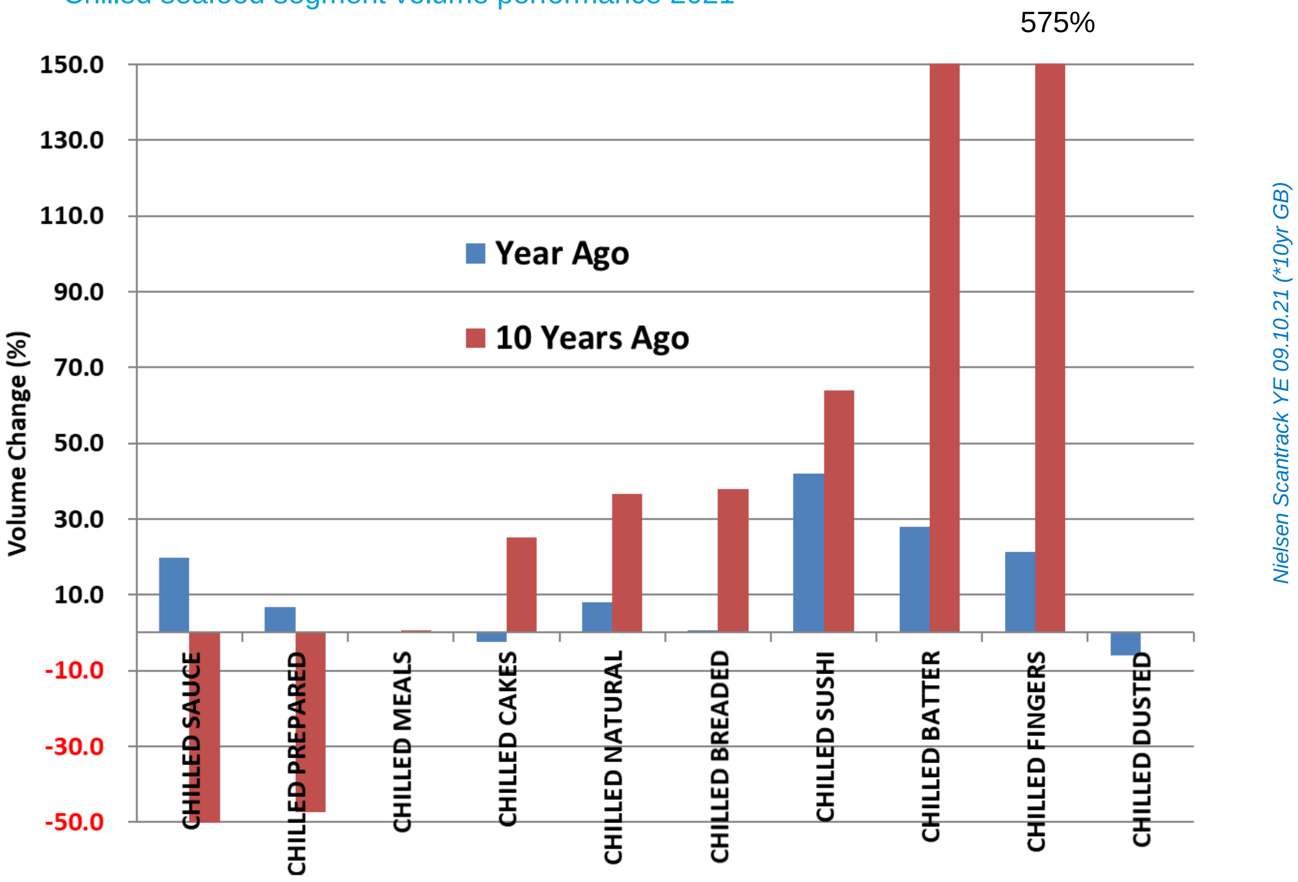
Most chilled segments were also in growth over the long term (10yrs to 9th October 2021) with the exception of chilled prepared and sauce. Chilled batter (+256%) and fingers (+575%) showed the highest volume growth; whilst chilled sauce (-66.7%) and prepared (-47.3%), saw the greatest volume declines.

UK Chilled Seafood Segment Value Share 2021



Nielsen Scantrack YE 09.10.21

Chilled seafood segment volume performance 2021



Chilled seafood segment performance to 2021

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2019 52wks to 09.10.19	2020 52wks to 09.10.20	2021 52wks to 09.10.21	% Chg '20 vs '21	% Chg 2011 vs 2021 (10YA)*	2019 52wks to 09.10.19	2020 52wks to 09.10.20	2021 52wks to 09.10.21	% Chg '20 vs '21	% Chg 2011 vs 2021 (10YA)*	Avg Price 2021	% Chg '20 vs '21	% Chg 2011 vs 2021 (10YA)*
TOTAL SEAFOOD	3,851,137	4,129,919	4,303,868	4.2	24.0	393,538	421,686	434,307	3.0	-10.1	£9.91	1.2	37.9
TOTAL CHILLED SEAFOOD	2,372,979	2,458,289	2,654,106	8.0	39.2	178,231	186,291	200,026	7.4	13.6	£13.27	0.6	22.6
TOTAL FROZEN SEAFOOD	920,917	1,063,830	1,080,823	1.6	12.3	130,992	143,833	145,568	1.2	-19.4	£7.42	0.4	39.3
TOTAL AMBIENT SEAFOOD	557,241	607,800	568,938	-6.4	-9.6	84,316	91,562	88,713	-3.1	-33.7	£6.41	-3.4	36.4
CHILLED NATURAL	1,404,905	1,482,326	1,564,483	5.5	61.3	81,456	88,656	95,783	8.0	36.7	£16.33	-2.3	17.9
CHILLED PREPARED	315,563	324,163	361,632	11.6	-35.1	26,297	26,756	28,551	6.7	-47.3	£12.67	4.5	23.2
CHILLED MEALS	161,895	156,515	162,520	3.8	28.3	22,327	21,168	21,234	0.3	0.7	£7.65	3.5	27.5
CHILLED SUSHI	107,441	89,503	130,369	45.7	123.0	6,420	5,537	7,867	42.1	63.9	£16.57	2.5	36.1
CHILLED BREADED	107,977	118,447	123,440	4.2	80.7	12,305	12,969	13,061	0.7	37.9	£9.45	3.5	31.0
CHILLED SAUCE	101,898	96,472	109,748	13.8	-39.2	9,100	9,047	10,847	19.9	-66.7	£10.12	-5.1	82.6
CHILLED CAKES	102,462	109,133	109,527	0.4	30.3	14,399	15,220	14,844	-2.5	25.3	£7.38	2.9	4.0
CHILLED BATTER	31,858	38,118	49,139	28.9	403.9	2,547	3,135	4,009	27.9	255.2	£12.26	0.8	41.9
CHILLED DUSTED	33,293	34,553	32,438	-6.1	NA	2,829	2,866	2,692	-6.1	NA	£12.05	0.0	NA
CHILLED FINGERS	5,688	9,058	10,810	19.3	627.0	550	937	1,137	21.4	574.8	£9.50	-1.7	7.7

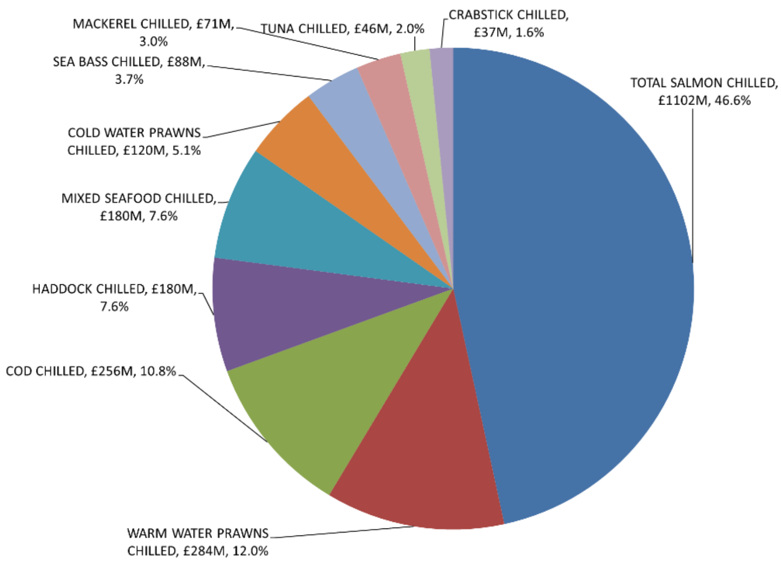
*Nielsen Scantrack YE 09.10.21 (*10yr GB)*

Chilled seafood species

Salmon continues to dominate the chilled seafood sector, increasing its value share of the top ten chilled species to 46.6% (+0.1pp), selling over four times its nearest competitor, warm water prawns. Smoked salmon makes up around a quarter of chilled salmon sales (26%) increasing volume share slightly this year.

For the first time last year, chilled warm water prawns 12.0% (+0.3pp) replaced cod as the second most valuable chilled species. Cod share increased by +0.1pp, whilst mixed seafood has displaced haddock as the third most popular product by volume for the first time.

UK Chilled Seafood Species Value Share 2021



Nielsen Scantrack YE 09.10.21

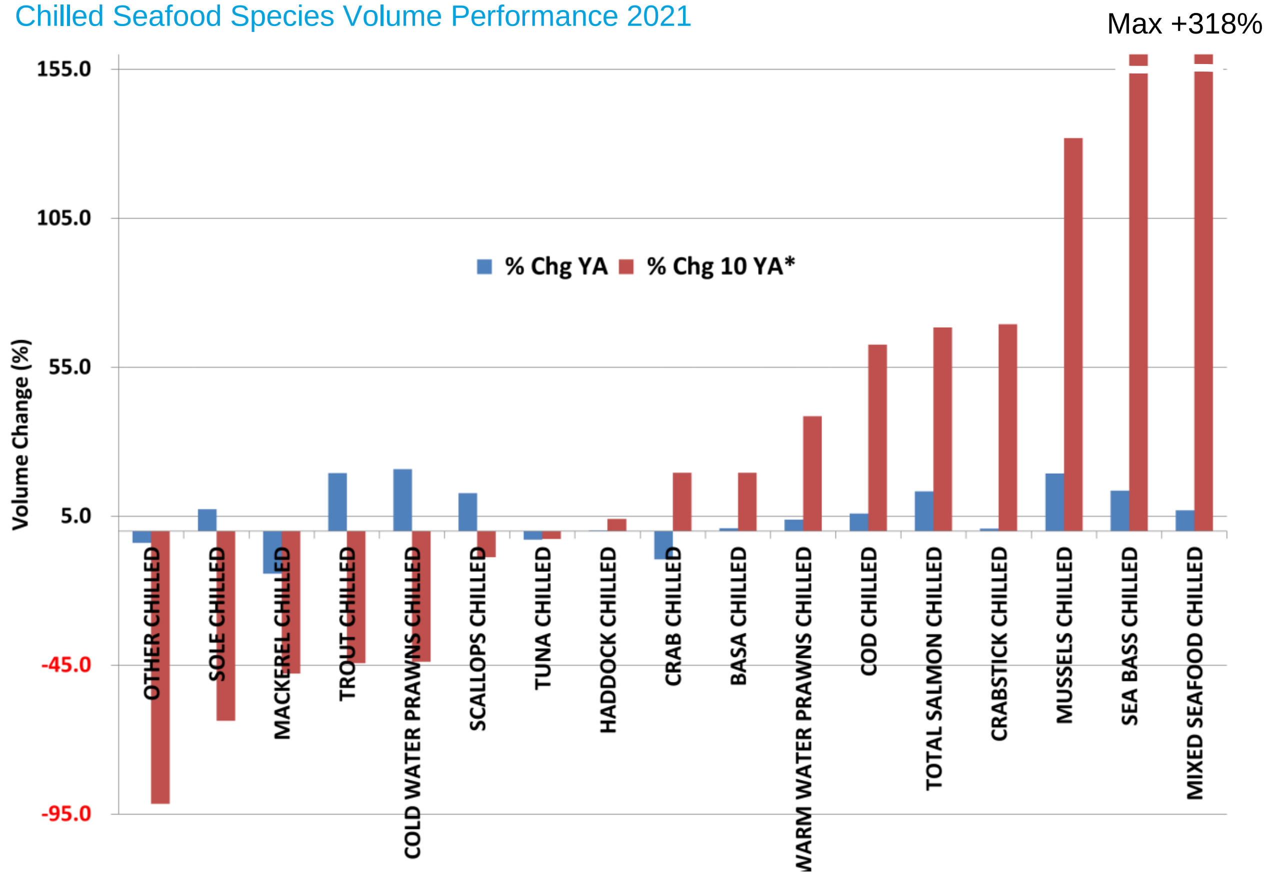
The consumption of traditional whitefish species has been in steady decline since the 1980s, whilst salmon and other aquacultured seafood species such as warm water prawns, basa, sea bass and bream and salmon continue to grow in popularity despite salmon being typically over 60% more expensive per kg than cod. In 2021, farmed seafood made up around 70% of the top five chilled species by value (without accounting for the proportion of salmon and prawns in mixed seafood); a significantly higher proportion than in the frozen sector.

This year, consumption of most of the top 20 seafood species increased, except for crab, mackerel and tuna. Some of the highest growth come from salmon, cold water prawns, seabass, mussels and scallops. Retail has benefited from the slow recovery of foodservice, as consumers continued to ‘dine in’, enjoying species commonly associated with eating out.

Most chilled species were also in growth over the long term (10yrs to 9th October 2021). Mixed seafood (+318%), sea bass (+242%), and mussels (+132%) showed the highest volume growth. Cheaper “other” seafood (where the species is not identified), saw the greatest volume decline (-92%) as shoppers’ choices ‘premium-ised’; along with chilled cold water prawns, mackerel, trout, and sole.

Price changes have typically influenced most species trends since 2008, where significant price increases have impacted negatively on volume sales. The main exceptions to this are chilled farmed species and mixed seafood, where consumption has continued to increase despite double-digit price increases.

Chilled Seafood Species Volume Performance 2021



*Nielsen Scantrack YE 03.10.20 (*10yr GB)*

Chilled seafood species performance to 2021

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2019 52wks to 09.10.19	2020 52wks to 09.10.20	2021 52wks to 09.10.21	% Chg '20 vs '21	% Chg 2011 vs 2021 (10YA)*	2019 52wks to 09.10.19	2020 52wks to 09.10.20	2021 52wks to 09.10.21	% Chg '20 vs '21	% Chg 2011 vs 2021 (10YA)*	Avg Price 2021	% Chg '20 vs '21	% Chg 2011 vs 2021 (10YA)*
FISH	3,851,137	4,129,919	4,303,868	4.2	24.0	393,538	421,686	434,307	3.0	-10.1	£9.91	1.2	37.9
CHILLED	2,372,979	2,458,289	2,654,106	8.0	39.2	178,231	186,291	200,026	7.4	13.6	£13.27	0.6	22.6
TOTAL SALMON CHILLED	959,765	1,014,632	1,101,907	8.6	76.4	51,183	56,278	63,758	13.3	68.4	£17.28	-4.1	4.8
WARM WATER PRAWNS CHILLED	249,940	264,947	284,326	7.3	79.6	16,397	17,308	17,977	3.9	38.6	£15.82	3.3	29.6
COD CHILLED	228,623	240,715	255,773	6.3	42.7	20,318	22,118	23,432	5.9	62.6	£10.92	0.3	-12.2
HADDOCK CHILLED	167,702	176,928	180,292	1.9	9.8	15,160	16,488	16,538	0.3	4.2	£10.90	1.6	5.4
MIXED SEAFOOD CHILLED	168,409	158,967	180,260	13.4	504.9	17,306	16,399	17,544	7.0	318.3	£10.27	6.0	44.7
COLD WATER PRAWNS CHILLED	99,633	98,735	119,609	21.1	-29.3	7,957	7,393	8,933	20.8	-43.9	£13.39	0.3	25.9
SEA BASS CHILLED	63,743	78,588	87,852	11.8	153.9	3,883	4,705	5,346	13.6	241.5	£16.43	-1.6	-25.6
MACKEREL CHILLED	77,881	78,052	71,323	-8.6	-16.5	8,561	8,285	7,098	-14.3	-47.9	£10.05	6.7	60.2
TUNA CHILLED	46,679	45,763	46,226	1.0	40.2	3,494	3,740	3,633	-2.9	-2.7	£12.72	4.0	44.0
CRABSTICK CHILLED	35,899	37,646	37,275	-1.0	54.2	9,325	9,689	9,762	0.8	69.5	£3.82	-1.7	-9.0
TROUT CHILLED	34,398	30,690	36,488	18.9	-5.4	2,280	1,904	2,276	19.5	-44.3	£16.03	-0.5	69.8
OTHER CHILLED	36,634	32,030	34,595	8.0	-87.2	4,963	4,398	4,226	-3.9	-91.5	£8.19	12.4	50.0
SOLE CHILLED	19,020	19,964	22,025	10.3	1.6	1,274	1,371	1,471	7.3	-63.6	£14.97	2.8	179.4
MUSSELS CHILLED	20,011	19,239	22,004	14.4	-2.6	3,600	3,631	4,336	19.4	131.9	£5.07	-4.2	-58.0
CRAB CHILLED	17,507	18,469	19,874	7.6	58.0	764	712	645	-9.5	19.5	£30.81	18.9	48.8
BASA CHILLED	16,359	18,133	16,861	-7.0	154.2	1,539	1,739	1,756	1.0	19.5	£9.60	-7.9	17.8
SCALLOPS CHILLED	11,730	11,437	13,143	14.9	21.8	482	452	509	12.7	-8.8	£25.80	2.0	33.5

*Nielsen Scantrack YE 09.10.2021 (*10yr GB): 'Other 'is where the seafood species is not identified i.e., ' fish fingers' or 'fish' pie*

The chilled seafood shopper

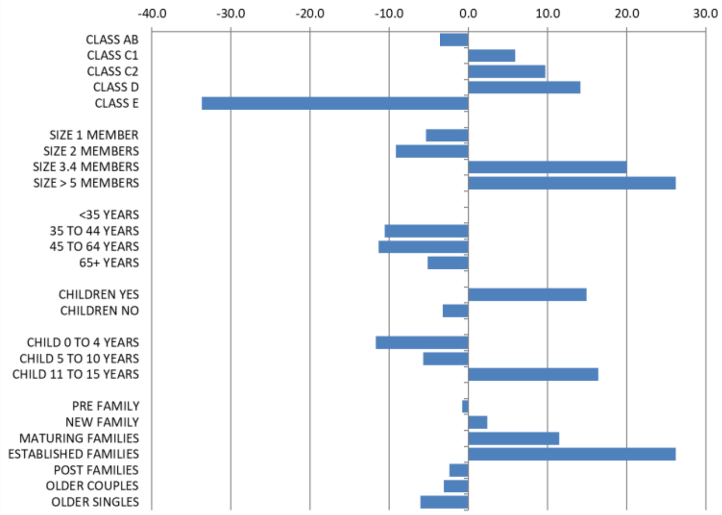
Nielsen demographics describe the chilled seafood shopper as more affluent than the average seafood buyer. Chilled seafood shoppers are predominantly older (45-64) couples and singles, typically in two person households without children present. Where children are present, those children are typically aged 11-15 yrs.

Compared to 10 years ago, over 30% of the lowest income shoppers traded out of chilled seafood, balanced by a substantial increase in middle income shoppers. There was also a significant shift to larger households with older children, purchasing chilled seafood.

Chilled seafood demographics share 2021

	CHILLED
CLASS AB	33.6
CLASS C1	29.8
CLASS C2	18.7
CLASS D	11.0
CLASS E	6.8
SIZE 1 MEMBER	25.4
SIZE 2 MEMBERS	42.0
SIZE 3.4 MEMBERS	27.5
SIZE > 5 MEMBERS	5.1
<35 YEARS	10.2
35 TO 44 YEARS	14.1
45 TO 64 YEARS	35.3
65+ YEARS	40.4
CHILDREN YES	20.5
CHILDREN NO	79.5
CHILD 0 TO 4 YEARS	24.4
CHILD 5 TO 10 YEARS	36.9
CHILD 11 TO 15 YEARS	38.7
PRE FAMILY	5.5
NEW FAMILY	4.4
MATURING FAMILIES	9.5
ESTABLISHED FAMILIES	8.4
POST FAMILIES	15.8
OLDER COUPLES	37.8
OLDER SINGLES	18.5

Change in chilled seafood Demographic 2021 vs 2011 (%)



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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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