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

Chilled Seafood in Multiple Retail (2022)

A market insight analysis (20m read)

R. Watson

November 2022

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

- **In the 52 wks. to 8th October 2022, chilled seafood was worth £2.53bn (-3.8%) with a volume of 179,670 tonnes (-7.7%); and an average price of £14.05/kg (+4.2%).**

- **Chilled increased share of seafood category sales to 62%. The only sector in consistent long-term growth since 2007, chilled took share from frozen.**

- **The chilled natural segment (i.e., seafood with no additional ingredients), continues to take the largest share of the chilled seafood sector by both volume (47%) and value (57%) but this year lost share to prepared, meals and sushi. Most chilled segments were also in volume growth over the past 10 years with the exception of chilled prepared, meals and sauce.**

- **In the 52 wks. to 8th October 2022, fewer shoppers bought chilled seafood less often with a smaller basket size. On average, chilled shoppers bought 0.39kg of chilled fish per trip spending £5.05; buying chilled seafood 19.4 times per year, spending a total of £97.98, equating to 7.65kg over the year.**

- **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.**

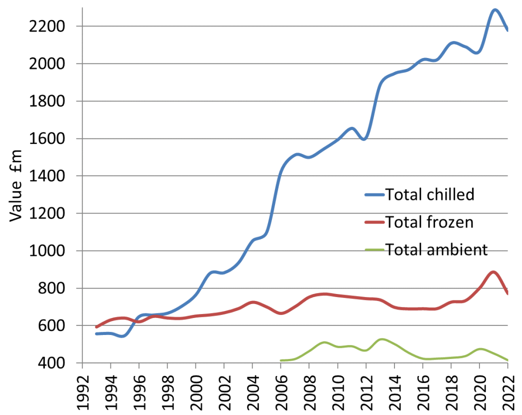
- **Chilled shopper demographics are changing. Compared to 2016, over 30% of the lowest income shoppers traded out of chilled seafood, balanced by a substantial increase in middle income shoppers. There was also a significant shift to larger households with older children, purchasing chilled seafood.**

- **Salmon continues to dominate the chilled seafood sector, increasing its value share of the top ten chilled species to 47.8% (+1.2pp). Chilled warm water prawns remain the second most valuable chilled species increasing share slightly, whilst mixed seafood firmly displaced haddock becoming the third most popular product by value for the first time.** Highest volume growth; whilst the cheaper "other" seafood where the species is not identified, saw the greatest volume decline (-85.5%).

Historic retail seafood sector trends

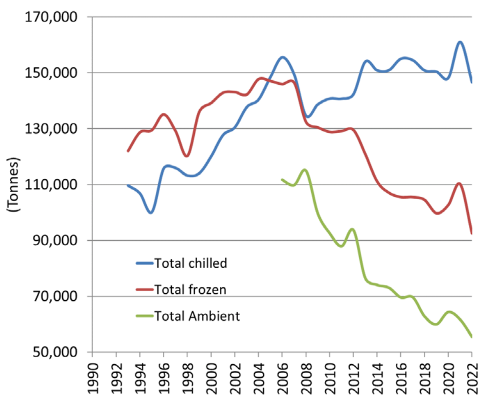
Over the past 20 years, chilled seafood has grown to dominate the category. In the late 1990s both the volume and value of chilled seafood began to grow faster than that of frozen and ambient seafood. By 2005, chilled seafood had overtaken frozen seafood volume sales, despite a much higher average price. 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%. By the end of 2022, any increased retail seafood consumption benefit from COVID-19 sales had gone, with all sectors falling back to pre-COVID-19 decline.

Long term GB seafood sector value trends



Nielsen GB Scantrack/TNS

Long term GB seafood sector volume trends

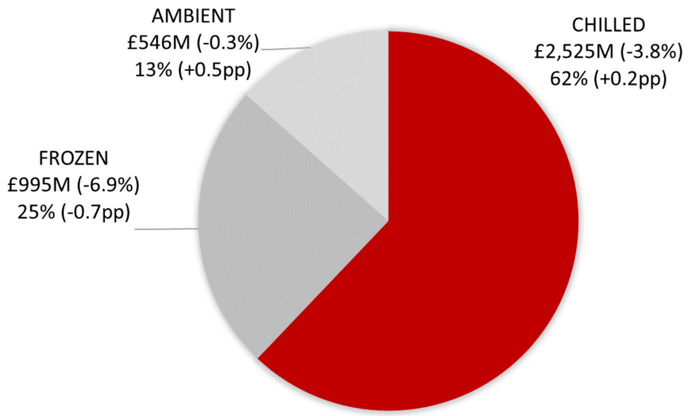


Nielsen GB Scantrack/TNS

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, which has continued into 2022. Chilled now takes over 60% of the £4.2bn seafood category increasing value share to 62% (+0.2pp- percentage points), taking share from frozen. By volume, chilled seafood takes a 45.1% (-1.2pp) share of the 398,473t category, this year losing share to ambient as shoppers look to save money.

UK seafood sector share by value 2022



Nielsen Scantrack YE 08.10.22

In the 52 wks. to 8th October 2022, chilled seafood was worth £2.53bn (-3.8%) with a volume of 179,670 tonnes (-7.7%); and an average price of £14.05/kg (+4.2%).

Over the long term (10 years to 8th October 2022), chilled seafood remained the only seafood sector in full growth (just), with sales up value up +25.9% and volume up by +0.8% whilst average price per kg increased by +24.8%. Chilled experienced similar inflation to ambient, but substantially less than the +39% rise in frozen.

Chilled seafood KPIs

In the 52 wks. to 8th October 2022, fewer shoppers bought chilled seafood less often with a smaller basket size. On average, chilled shoppers bought 0.39kg of chilled fish per trip spending £5.05; buying chilled seafood 19.4 times per year, spending a total of £97.98, equating to 7.65kg over the year.

Chilled seafood KPIs 2022

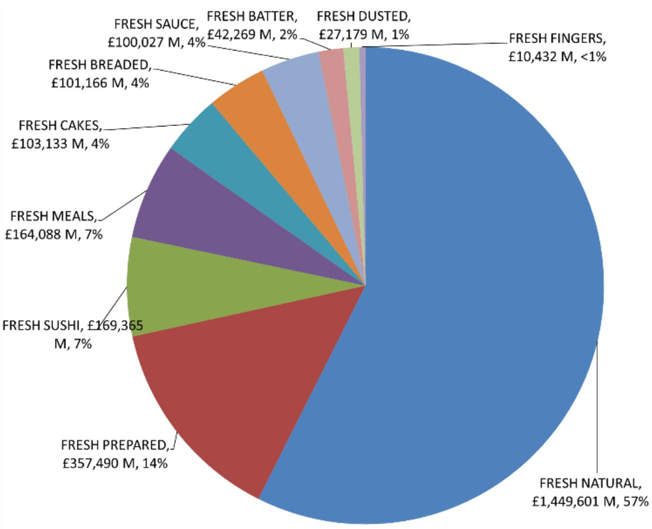
		Pen %	Freq	AWOP (Kg) 52w	Avg Spend (£) 52w	Trip Spend (£)	Price per Kg	Avg Trip Kg
TOTAL SEAFOOD	09 OCT 2021	96.10	29.90	15.56	£146.85	£4.91	£9.44	0.52
	08 OCT 2022	95.50	28.90	14.53	£139.70	£4.83	£9.61	0.50
	% Change	-0.7	-3.3	-6.6	-4.9	-1.6	1.9	-3.4
CHILLED SEAFOOD	09 OCT 2021	81.90	20.10	8.16	£102.26	£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

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 by both volume (47%) and value (57%) but has lost share to prepared, meals and sushi. In the 52wks to 8th October 2022 chilled natural was worth £1.45bn (-6.2%), with 84,094 (-10.0%) tonnes.

UK chilled seafood segment value share 2022

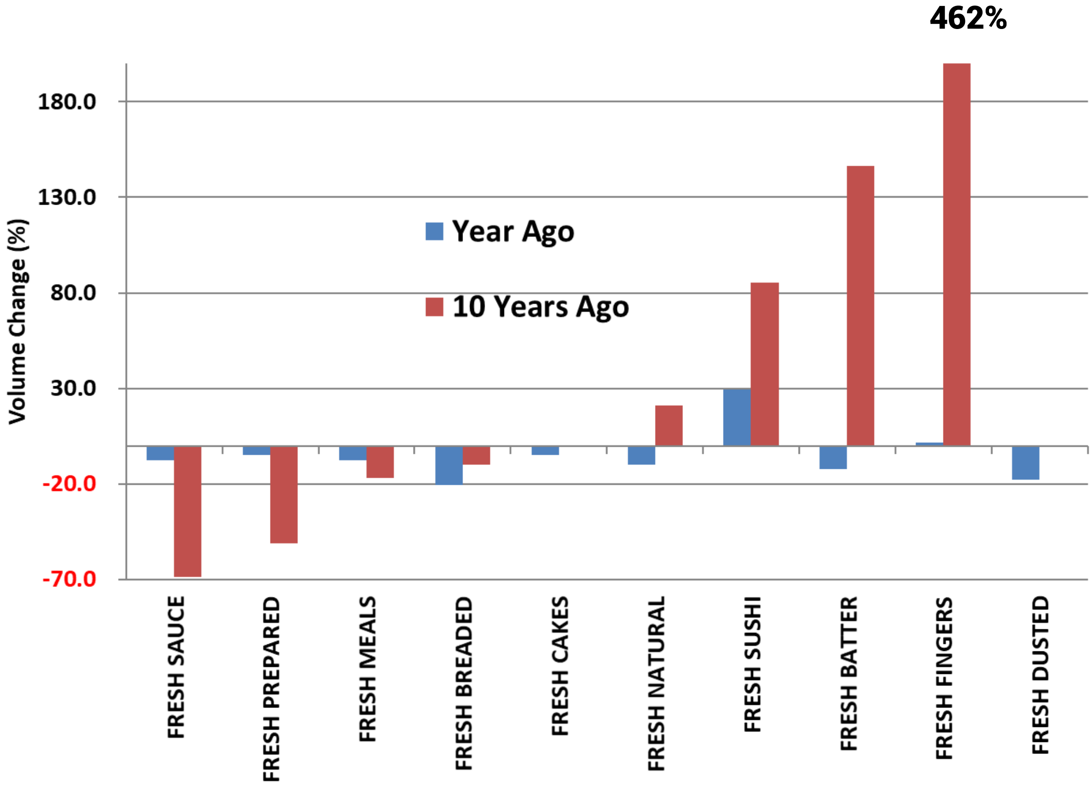


Nielsen Scantrack YE 08.10.22

Only chilled sushi and fingers were in full growth compared to last year. Chilled sushi (+29.8%), and fingers (+1.8%) showed the highest volume growth; Sushi sales being boosted by consumers cutting down on eating out to save money.

Most chilled segments were also in volume growth over the long term (10yrs to 8th October 2022) with the exception of chilled prepared, meals and sauce. Chilled batter (+146%) and fingers (+461%) and sushi (+85%) showed the highest volume growth; whilst chilled sauce (-69%) and prepared (-51%), saw the greatest volume declines.

Chilled seafood segment volume performance 2022



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

Chilled seafood segment performance to 2022

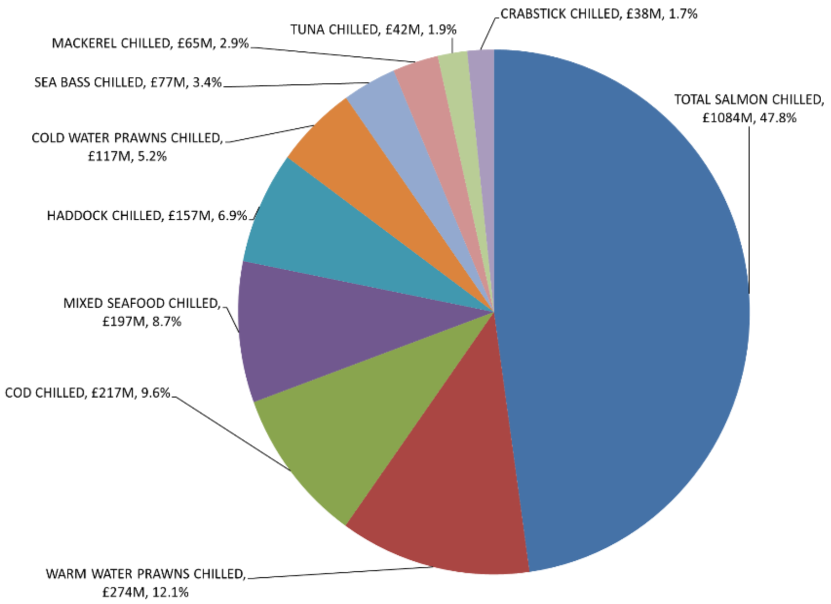
	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2020 52wks to 08.10.20	2021 52wks to 08.10.21	2022 52wks to 08.10.22	% Chg '21 vs '22	% Chg 2012 vs 2022 (10YA)*	2020 52wks to 08.10.20	2021 52wks to 08.10.21	2022 52wks to 08.10.22	% Chg '21 vs '22	% Chg 2012 vs 2022 (10YA)*	Avg Price 2022	% Chg '21 vs '22	% Chg 2012 vs 2022 (10YA)*
TOTAL SEAFOOD	4,080,280	4,242,649	4,065,887	-4.2	11.9	410,080	420,729	398,473	-5.3	-17.9	£10.20	1.2	36.3
TOTAL CHILLED SEAFOOD	2,424,862	2,625,763	2,524,750	-3.8	25.9	182,153	194,659	179,670	-7.7	0.8	£14.05	4.2	24.8
TOTAL FROZEN SEAFOOD	1,054,757	1,068,856	994,738	-6.9	0.8	142,098	144,095	129,235	-10.3	-27.6	£7.70	3.8	39.3
TOTAL AMBIENT SEAFOOD	600,661	548,030	546,400	-0.3	-18.7	85,830	81,974	89,568	9.3	-35.1	£6.10	-8.7	25.3
FRESH NATURAL	1,460,110	1,545,038	1,449,601	-6.2	38.6	86,745	93,407	84,094	-10.0	21.2	£17.24	4.2	21.5
FRESH PREPARED	327,891	373,480	357,490	-4.3	-42.3	26,605	28,974	27,516	-5.0	-51.2	£12.99	0.8	18.2
FRESH SUSHI	91,971	130,023	169,365	30.3	157.2	5,907	7,825	10,119	29.3	85.4	£16.74	0.7	38.7
FRESH MEALS	154,735	159,783	164,088	2.7	15.0	21,147	20,730	19,178	-7.5	-16.7	£8.56	11.0	38.1
FRESH CAKES	104,007	106,768	103,133	-3.4	2.6	14,211	14,195	13,486	-5.0	0.3	£7.65	1.7	2.3
FRESH BREADED	115,808	121,217	101,166	-16.5	22.2	12,591	12,823	10,170	-20.7	-9.9	£9.95	5.2	35.7
FRESH SAUCE	91,829	101,246	100,027	-1.2	-39.9	8,392	9,384	8,675	-7.6	-68.7	£11.53	6.9	92.0
FRESH BATTER	35,749	46,644	42,269	-9.4	216.5	2,866	3,728	3,269	-12.3	146.2	£12.93	3.3	28.6
FRESH DUSTED	34,093	31,685	27,179	-14.2	N/A	2,799	2,560	2,110	-17.6	N/A	£12.88	4.1	N/A
FRESH FINGERS	8,670	9,878	10,432	5.6	524.3	890	1,034	1,052	1.8	461.4	£9.91	3.8	11.2

Nielsen Scantrack YE 08.10.22 (*10yr GB)

Chilled seafood species

Salmon continues to dominate the chilled seafood sector, increasing its value share of the top ten chilled species to 47.8% (+1.2pp), selling around four times its nearest competitor, warm water prawns. Smoked salmon makes up around a quarter (24%) of chilled salmon volume sales but is losing share rapidly (-1.7pp) to unsmoked salmon.

UK chilled seafood species value share 2022



Nielsen Scantrack YE 08.10.22

Chilled warm water prawns remain the second most valuable chilled species increasing share slightly, whilst mixed seafood firmly displaced haddock becoming the third most popular product by value for the first time.

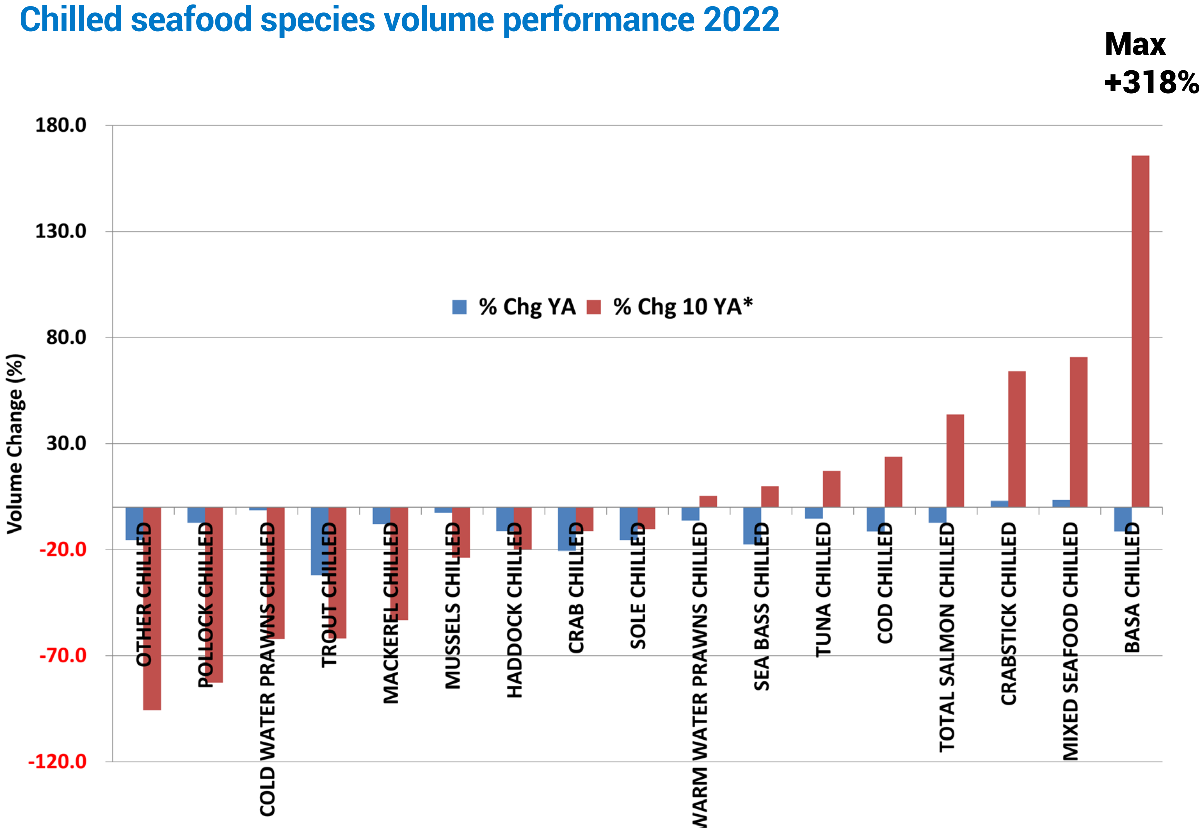
The consumption of traditional whitefish species has been in steady decline since the 1980s, whilst salmon and other aquacultured seafood species such as warm water prawns, basa, sea bass and bream and salmon continue to grow in popularity, despite salmon now 62% more expensive per kg than cod. In 2022, farmed seafood made up 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 all the top 20 seafood species declined, except for mixed seafood. The largest declines were seen in trout, crab, and seabass.

Most chilled species were also in decline over the long term (10yrs to 8th October 2022). Basa (+166%), mixed seafood (+71%), sea bass (+242%), and crabstick (+64%) and salmon (+44%) showed the highest long term volume growth. Cheaper "other" seafood (where the species is not identified), saw the greatest volume decline (-96%) 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 2022



Nielsen Scantrack YE 08.10.2022 (10yr GB)

Chilled 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	11.9	410,080	420,729	398,473	-5.3	-18.8	£10.20	1.2	37.8
CHILLED	2,424,862	2,625,763	2,524,750	-3.8	25.9	182,153	194,659	179,670	-7.7	3.5	£14.05	4.2	21.6
TOTAL SALMON CHILLED	1,001,380	1,100,309	1,083,506	-1.5	55.5	54,765	62,464	57,882	-7.3	43.9	£18.72	6.3	8.1
WARM WATER PRAWNS CHILLED	256,844	277,201	273,973	-1.2	65.0	16,490	17,224	16,175	-6.1	5.4	£16.94	5.2	56.5
COD CHILLED	230,813	241,067	216,717	-10.1	29.1	20,392	21,150	18,739	-11.4	23.8	£11.56	1.5	4.3
MIXED SEAFOOD CHILLED	156,325	179,838	197,255	9.7	430.5	16,277	17,528	18,126	3.4	70.8	£10.88	6.1	58.9
HADDOCK CHILLED	171,159	177,061	156,950	-11.4	-10.4	15,588	15,913	14,118	-11.3	-19.8	£11.12	-0.1	11.7
COLD WATER PRAWNS CHILLED	97,874	113,718	116,816	2.7	-28.5	7,422	8,306	8,186	-1.4	-62.0	£14.27	4.2	88.0
SEA BASS CHILLED	77,948	88,510	77,007	-13.0	154.0	4,637	5,378	4,440	-17.4	9.9	£17.35	5.4	131.0
MACKEREL CHILLED	75,148	68,787	65,411	-4.9	-26.3	8,133	6,694	6,165	-7.9	-53.1	£10.61	3.3	57.1
TUNA CHILLED	45,109	45,308	42,284	-6.7	22.2	3,601	3,433	3,252	-5.3	17.3	£13.00	-1.5	4.2
CRABSTICK CHILLED	36,236	35,983	37,832	5.1	40.2	9,128	9,264	9,547	3.1	64.2	£3.96	2.0	-14.5
OTHER CHILLED	37,059	37,467	34,992	-6.6	-88.6	5,069	4,711	3,986	-15.4	-95.7	£8.78	10.4	163.0
TROUT CHILLED	30,823	36,592	25,766	-29.6	-31.7	1,917	2,329	1,582	-32.1	-61.7	£16.29	3.7	78.4
MUSSELS CHILLED	18,780	21,422	21,943	2.4	-15.7	3,454	4,149	4,041	-2.6	-23.6	£5.43	5.2	10.3
BASA CHILLED	21,742	21,388	19,810	-7.4	254.2	2,225	2,309	2,045	-11.4	165.8	£9.69	4.6	33.3
SOLE CHILLED	19,957	21,923	18,834	-14.1	-6.3	1,371	1,462	1,239	-15.3	-10.3	£15.20	1.4	4.4
CRAB CHILLED	18,303	19,947	16,497	-17.3	49.0	705	649	516	-20.4	-11.3	£31.96	3.9	-49.0
POLLOCK CHILLED	13,588	14,546	14,391	-1.1	-92.1	2,845	3,098	2,872	-7.3	-82.5	£5.01	6.7	-69.2

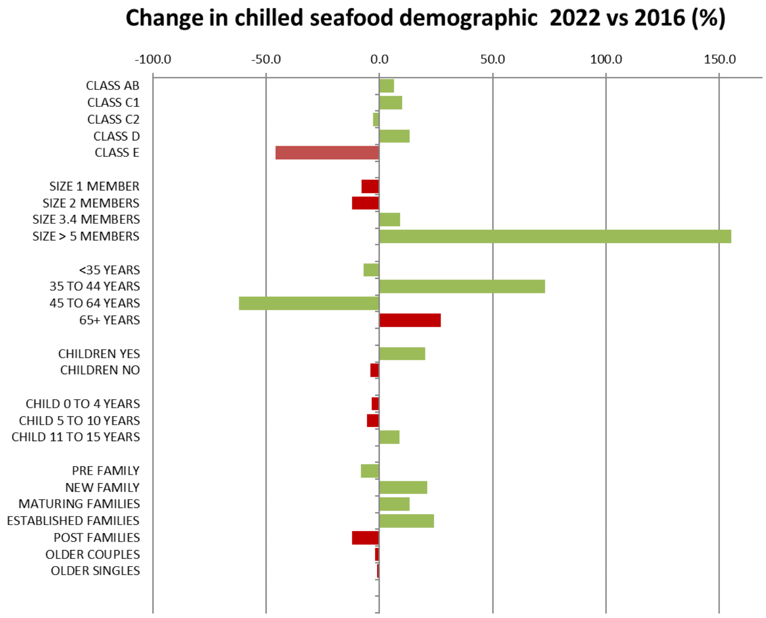
Nielsen Scantrack YE 08.10.2022 (*10yr GB): 'Other 'is where the seafood species is not identified i.e., ' fish fingers' or

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 2016, 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 2022 vs 2016



Nielsen Homescan YE 08.10 22

Change in chilled seafood Demographic 2022 vs 2016 (%)

	TOTAL SEAFOOD (% Share)	Total % Chg	CHILLED (% Share)	Chilled % Chg
CLASS AB	30.8	5.0	35.2	6.5
CLASS C1	29.9	8.6	30.1	10.0
CLASS C2	19.6	-4.5	17.5	-2.8
CLASS D	12.2	9.8	10.6	13.3
CLASS E	7.5	-34.7	6.7	-45.9
SIZE 1 MEMBER	22.8	-3.6	25.6	-7.8
SIZE 2 MEMBERS	37.4	-11.2	40.4	-12.2
SIZE 3.4 MEMBERS	29.1	3.8	24.7	9.1
SIZE > 5 MEMBERS	10.7	71.6	9.4	155.1
<35 YEARS	9.9	-14.5	8.6	-7.0
35 TO 44 YEARS	24.6	52.3	23.8	73.1
45 TO 64 YEARS	15.9	-56.1	12.9	-61.9
65+ YEARS	49.6	37.7	54.7	27.0
CHILDREN YES	24.3	7.5	19.1	20.3
CHILDREN NO	75.7	-2.2	80.9	-3.8
CHILD 0 TO 4 YEARS	24.0	-5.5	25.2	-3.4
CHILD 5 TO 10 YEARS	38.5	-3.9	37.5	-5.4
CHILD 11 TO 15 YEARS	37.5	8.6	37.3	8.7
PRE FAMILY	5.1	-13.7	5.3	-8.2
NEW FAMILY	4.6	-1.3	4.2	21.2
MATURING FAMILIES	12.4	3.3	9.2	13.2
ESTABLISHED FAMILIES	10.0	19.0	8.1	24.1
POST FAMILIES	15.1	-9.1	14.3	-12.1
OLDER COUPLES	35.7	-1.1	39.1	-1.8
OLDER SINGLES	17.1	4.9	19.9	-1.1

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.

Subscribe to Market Insight Reports:
Individuals working full time for a seafood business can apply for a password to access Seafish Retail, Foodservice, Shopper and Trade Reports directly. You can subscribe using this link.

More Information:
For the full range of market insight factsheets, covering different sectors of the seafood industry, visit the Seafish website - https://www.seafish.org/insight-and-research/

For more information please contact:
Richard Watson
Market Analyst

T: : +44 (0) 1472 252 331
E: richard.watson@seafish.co.uk
W: Latest MI retail publications
W: MI secure area login

Seafish
Seafish Origin Way,
Europarc,
Grimsby,
DN37 9TZ

www.seafish.org

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