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the support it needs to thrive.



Chilled Seafood in Multiple Retail (2025)

Market insight analysis (20m read)

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October 2025





Chilled Seafood in Multiple Retail (2025 Update)

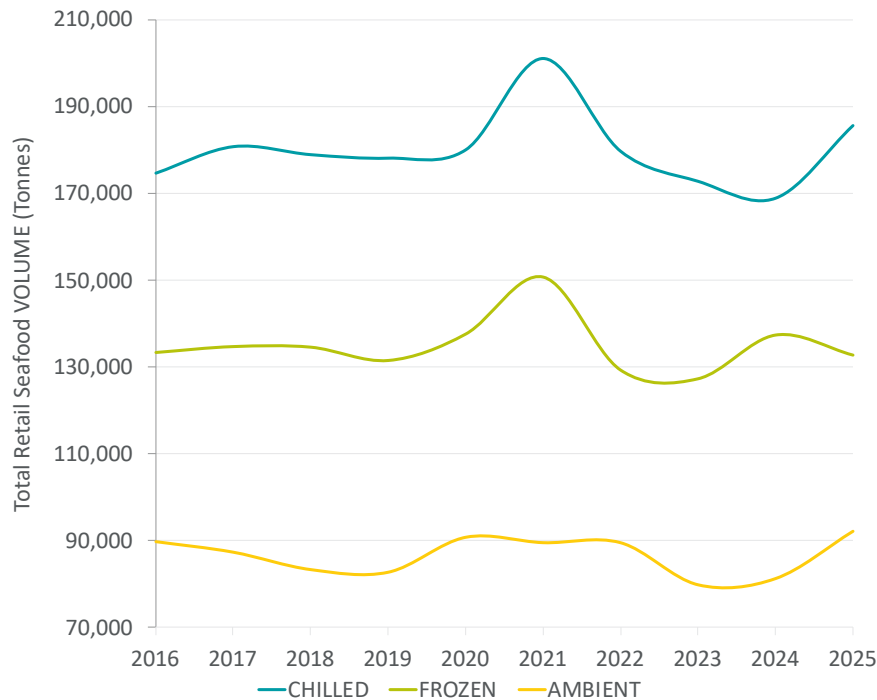
Understanding the changing landscape of seafood retail sales and consumer preferences is key to running a successful seafood business. This factsheet covers the top-level, 'chilled seafood' trends at the sector, segment and species level, along with changing shopper trends, key point indicators (KPI's) and demographics in multiple retail in 2025.

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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 the 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. In 2023, with shoppers facing unprecedented economic pressure and inflation, all seafood sectors, including chilled, returned to price-driven growth. Towards the end of 2023, seafood returned to full growth, volume sales boosted by sales of frozen coated seafood, and chilled seafood returned to full growth as of mid-2024. In the 12 months to mid-2025, total seafood has remained in full growth (just). Frozen seafood returned to volume decline, with chilled seafood (with a small contribution from ambient) driving volume sales (Figure 1).

UK Retail Seafood Sector Consumption Trends to 2025 (Figure 1)



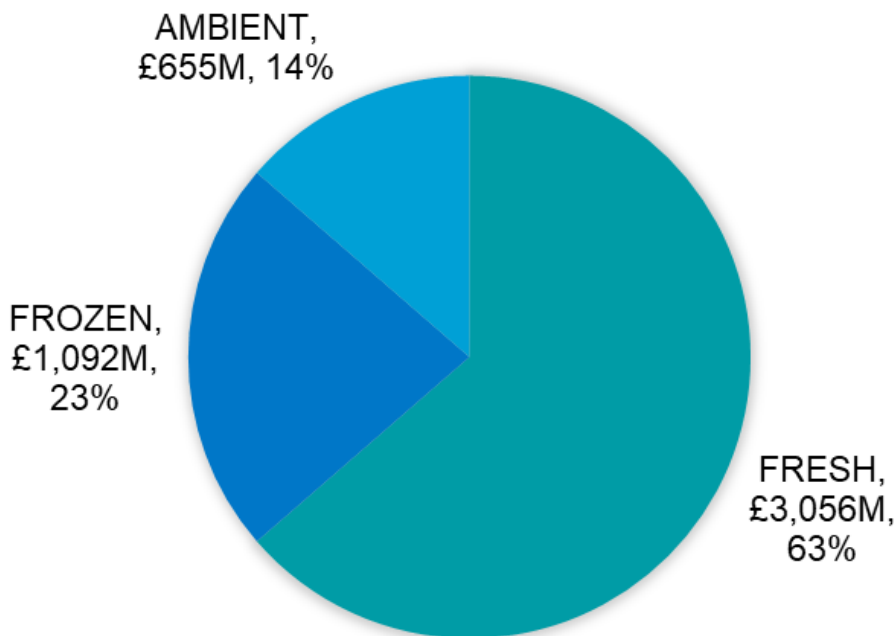
Nielsen Scantrack YE 15.06.24

Chilled seafood performance

Historically, chilled has been the only seafood segment in consistent volume growth. However, chilled seafood lost share to frozen and ambient in 2020 as COVID-19 changed shopping patterns. Interest in frozen seafood has remained strong, driven by the cost-of-living crisis, due to its relatively low average price. Chilled seafood returned to price-driven growth in 2023 as inflation kept the value of the category from declining. Chilled seafood volume sales began to improve through early 2024 and returned to full growth in mid-2024.

In October 2025, chilled seafood continues to take over 60% of the seafood category. Chilled value share grew to 63.6% (+1.3pp), taking share from frozen. By volume, chilled seafood took a 46.0% (+1.3pp) share of the category, gaining share from frozen as shoppers look for perceived quality (Figure 2).

UK seafood sector share by value 2025 (Figure 2)



Nielsen Scantrack YE 04.10.25

In the 52 wks. to 4th October 2025, chilled seafood remained in full growth, worth £3.06bn (+6.2%) with a volume of 188,977 tonnes (+3.3%); and an average price of £16.17/kg (+2.8%).

Over the long term (9 years to October 2025), chilled seafood has remains in full growth, with sales value up +40% driven by inflation and volume up +8.8%, whilst the average price per kg increased by +28.7%. Chilled seafood experienced lower inflation than frozen but increased in price more than ambient.

Chilled seafood KPIs

In the 52 wks. to 4th October 2025, more shoppers bought chilled seafood more often with a smaller, more expensive basket size. On average, chilled shoppers bought 0.4kg of chilled fish per trip, spending £5.23; buying chilled seafood 19.1 times per year, spending a total of £108.02, equating to 6.9kg over the year (Figure 3).

Chilled seafood KPIs 2025 (Figure 3)

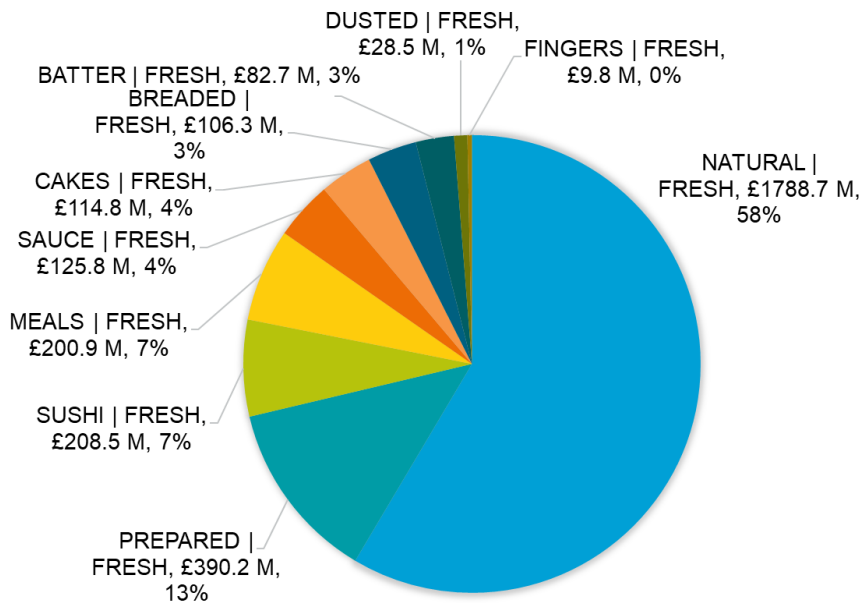
		Pen %	Freq	Avg Spend (£) 52w	AWOP (Kg) 52w	Trip Spend (£)	Avg Trip Kg	Price per Kg
TOTAL SEAFOOD	14 JUN 2024	95.2	27.6	£142.21	13.1	£5.15	0.5	£10.85
	14 JUN 2025	95.0	28.0	£146.59	13.1	£5.23	0.5	£11.21
	% Change	-0.2	1.5	3.1	-0.3	1.5	-1.8	3.4
CHILLED SEAFOOD	14 JUN 2024	80.4	18.6	£103.54	6.8	£5.55	0.4	£15.30
	14 JUN 2025	81.0	19.1	£108.02	6.9	£5.67	0.4	£15.66
	% Change	0.8	2.2	4.3	2.0	2.1	-0.2	2.3
FROZEN SEAFOOD	14 JUN 2024	82.2	9.2	£40.66	5.1	£4.42	0.6	£7.90
	14 JUN 2025	81.2	9.0	£40.53	5.0	£4.49	0.5	£8.18
	% Change	-1.3	-1.9	-0.3	-3.8	1.7	-1.9	3.6
AMBIENT SEAFOOD	14 JUN 2024	75.1	9.2	£24.90	3.7	£2.71	0.4	£6.67
	14 JUN 2025	75.2	9.3	£25.05	3.7	£2.71	0.4	£6.71
	% Change	0.2	0.6	0.6	-0.1	0.0	-0.6	0.7

Nielsen Homescan YE 04.10.25

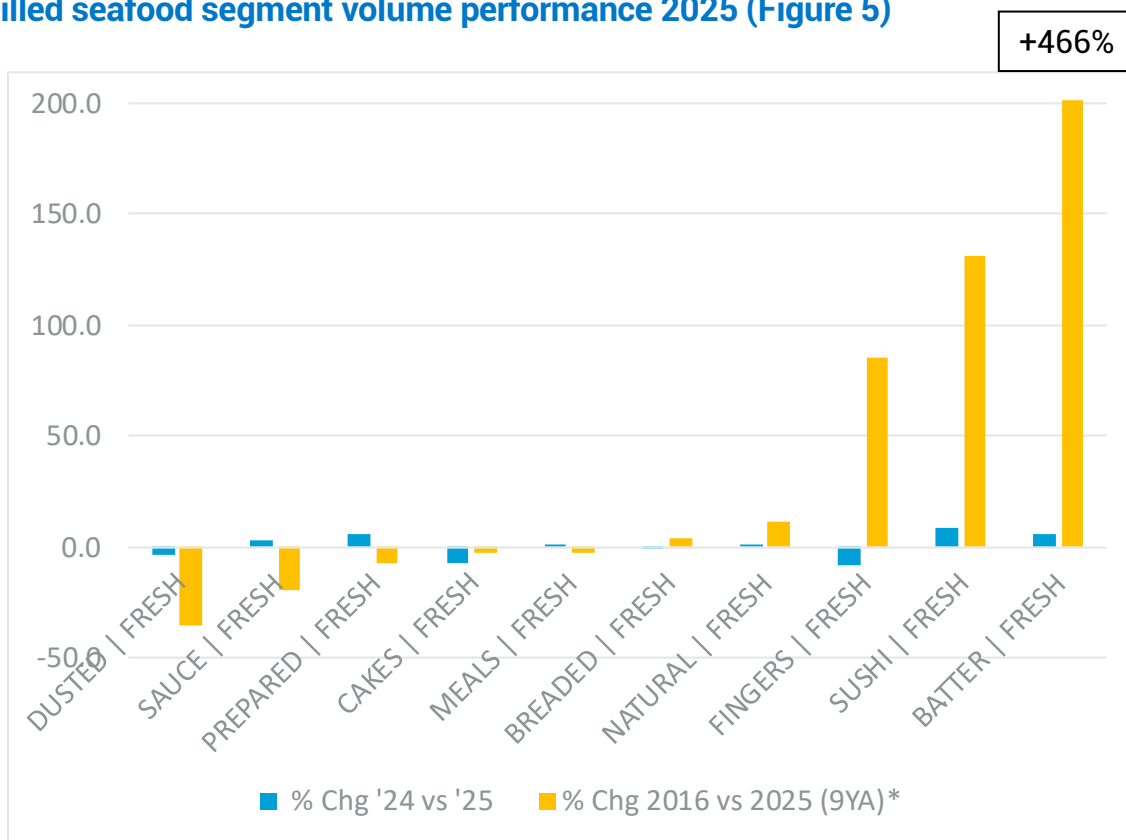
Chilled seafood segment performance

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 48% (+1%) and value 58% (0.0%), increasing volume share. In the 52 weeks to 4th October 2025, chilled natural was worth £1.78bn (+6.2%), with 90,887 (+1.6%) tonnes (Figure 4).

UK chilled seafood segment value share 2025 (Figure 4)



Chilled seafood segment volume performance 2025 (Figure 5)



Nielsen Scantrack YE 04.10.25

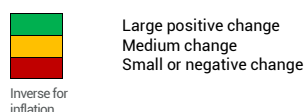
Shoppers have turned to more premium chilled products, as many more chilled segments returned to full growth. Cheaper segments were in volume decline, including chilled cakes, breaded, dusted and fingers. Prepared, sushi and battered segments showed the highest volume growth of up to +9%, whilst chilled fingers had the highest volume decline of -7.9%

Some chilled segments were also in volume growth over the long term (9 years to 04th October 2025). Chilled batter (+466%), sushi (+131%) and fingers (+85%) showed the highest volume growth; whilst chilled dusted (-35%) and chilled sauce (-19%), saw the greatest volume declines (Figure 5/6).

Chilled seafood segment performance to 2025 (Figure 6)

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2023 52wks to 04.10.25	2024 52wks to 04.10.25	2025 52wks to 04.10.25	% Chg. '24 vs '25	% Chg. 2016 vs 2025 (9YA)	2023 52wks to 04.10.25	2024 52wks to 04.10.25	2025 52wks to 04.10.25	% Chg. '24 vs '25	% Chg. 2016 vs 2025 (9YA)	Avg Price 2024 (£)	% Chg. '24 vs '25	% Chg. 2016 vs 2025 (9YA)
TOTAL SEAFOOD	4,472,647	4,620,241	4,802,949	4.0	35.4	398,049	409,473	411,143	0.4	3.4	£11.68	3.5	31.0
FRESH	2,735,584	2,878,806	3,056,197	6.2	40.0	176,957	182,986	188,977	3.3	8.8	£16.17	2.8	28.7
FROZEN	1,126,619	1,102,089	1,091,982	-0.9	28.6	133,446	135,102	129,419	-4.2	-3.8	£8.44	3.4	33.7
AMBIENT	610,444	639,346	654,770	2.4	27.3	87,645	91,385	92,748	1.5	3.6	£7.06	0.9	22.8
NATURAL FRESH	1,582,145	1,683,522	1,788,730	6.2	39.2	80,842	86,035	90,887	1.6	11.1	£19.68	0.6	25.4
PREPARED FRESH	364,281	373,509	390,217	4.5	18.0	26,113	25,092	25,486	5.6	-6.8	£15.31	2.9	26.5
SUSHI FRESH	170,550	184,439	208,457	13.0	188.9	9,962	10,694	11,658	9.0	131.3	£17.88	3.7	24.9
MEALS FRESH	182,095	185,947	200,884	8.0	38.7	19,858	19,796	20,095	1.5	-2.4	£10.00	6.4	42.0
SAUCE FRESH	111,394	115,093	125,785	9.3	1.3	9,044	9,139	9,414	3.0	-19.6	£13.36	6.1	26.0
CAKES FRESH	118,825	117,518	114,761	-2.3	19.5	13,865	13,992	13,027	-6.9	-2.4	£8.81	4.9	22.5
BREADED FRESH	110,346	107,067	106,347	-0.7	30.8	10,099	9,894	9,873	-0.2	4.4	£10.77	-0.5	25.2
BATTER FRESH	55,644	73,793	82,654	12.0	566.0	4,075	5,499	5,838	6.2	466.2	£14.16	5.5	17.6
DUSTED FRESH	29,059	27,320	28,538	4.5	-11.2	2,069	1,928	1,853	-3.9	-35.4	£15.40	8.7	37.5
FINGERS FRESH	11,243	10,599	9,822	-7.3	156.9	1,030	918	845	-7.9	85.0	£11.62	0.7	38.8

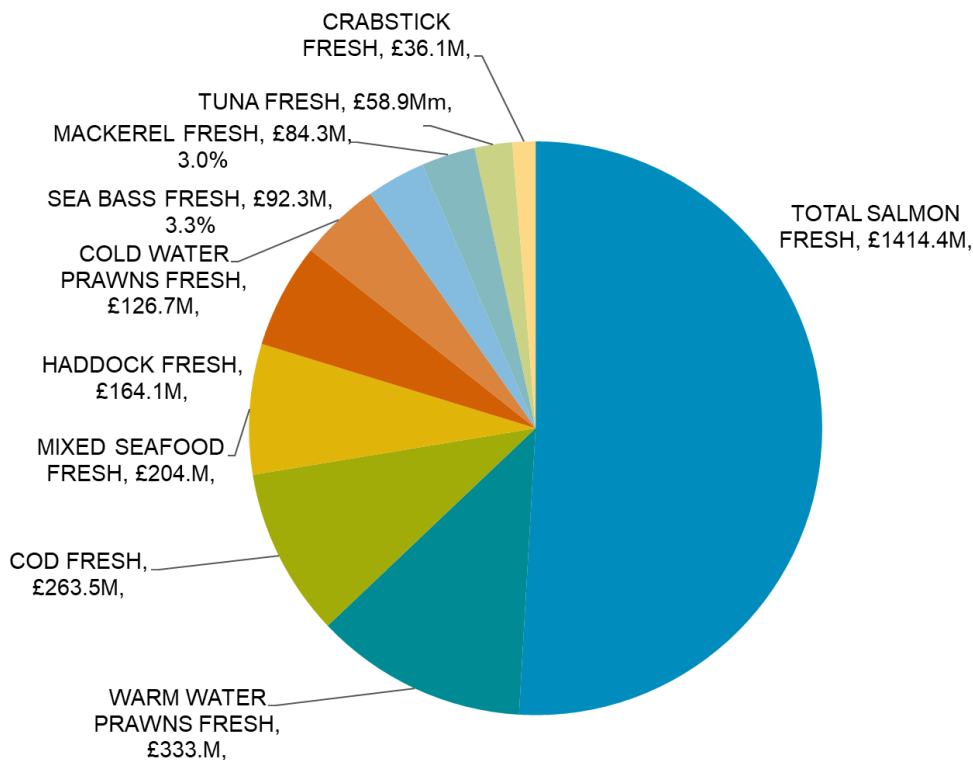
Nielsen Scantrack YE 04.10.25



Chilled seafood species

Salmon continues to dominate the chilled seafood sector, retaining a 46% value share of chilled seafood, selling over four times its nearest competitor, warm water prawns (Figure 7). Smoked salmon makes up around a quarter (23%) of chilled salmon volume sales, down slightly on last year.

Top UK chilled seafood species value share of total chilled 2025 (Figure 7)



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Chilled warm water prawns remain the second most valuable chilled species and are gaining value share of total chilled compared to other species in the top 10, which are static or in decline. Mixed seafood recently displaced haddock to become the fourth most popular chilled product by value last year, and if growth continues is on track to displace chilled cod in around two years.

The consumption of traditional whitefish species has been in steady decline since the 1980s, whilst salmon and other farmed seafood species such as warm water prawns, basa, sea bass and bream and salmon continue to grow in popularity. This is despite chilled salmon being 61% more expensive per kg than cod. In 2025, farmed seafood made up over 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.

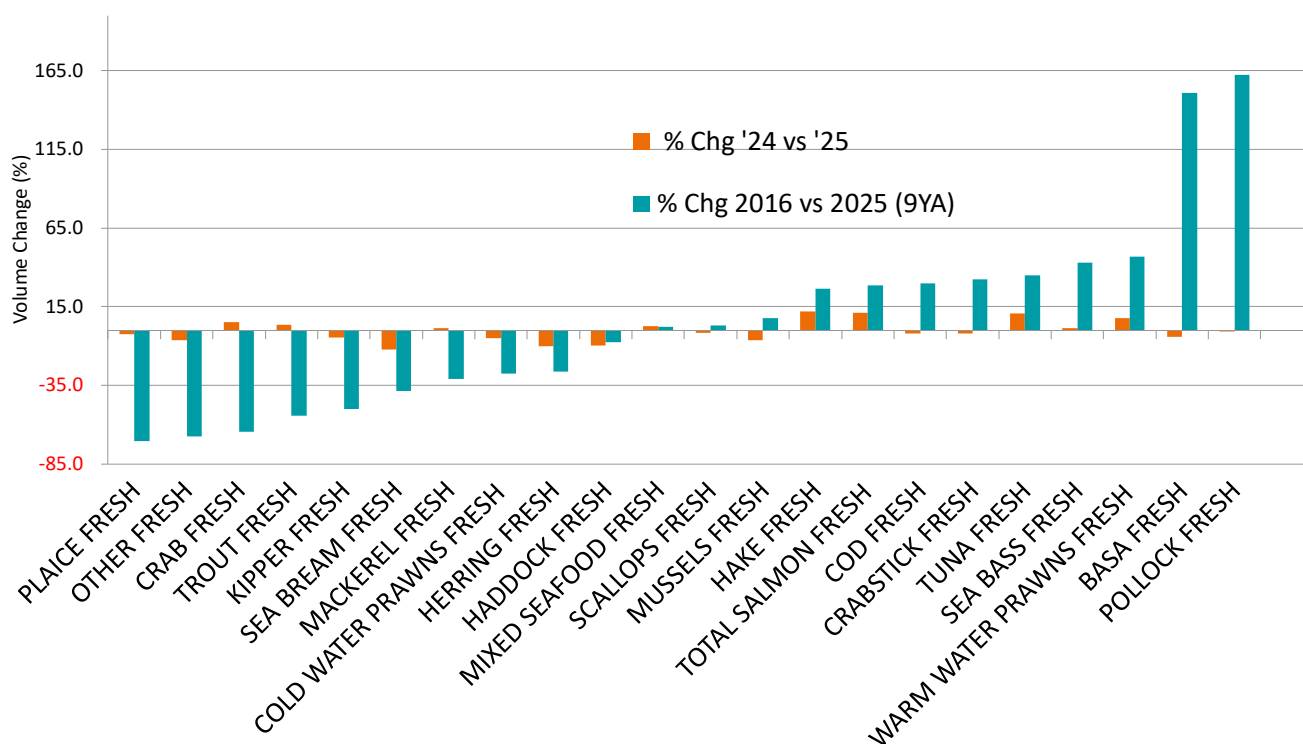
This year, consumption of chilled salmon, warm water prawns and tuna increased the most out of the top chilled seafood species. However, the highest volume growth was seen in chilled hake. The largest declines were seen in chilled haddock, cold-water prawns and 'other'(cheaper products where the seafood species is not mentioned) (Figure 8/9).

Chilled Salmon, warm water prawns and cod were also in growth over the long term (9 years) out of the top five chilled species. Pollock (+162%), basa (+151%) and warm water

prawns (+47%) saw the highest growth, whilst chilled place crab and 'other' saw the greatest long-term volume decline.

Price changes have typically influenced most species trends since 2008, when significant price increases have negatively impacted volume sales. The main exceptions to this are chilled farmed species such as salmon, warm water prawns and seabass, where consumption has continued to increase despite double-digit price increases.

UK chilled seafood species volume performance 2025 (Figure 8)



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Chilled seafood species performance to 2025 (Figure 9)

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2023 52wks to 04.10.25	2024 52wks to 04.10.25	2025 52wks to 04.10.25	% Chg. '24 vs '25	% Chg. 2016 vs 2025 (9YA)	2023 52wks to 04.10.25	2024 52wks to 04.10.25	2025 52wks to 04.10.25	% Chg. '24 vs '25	% Chg. 2016 vs 2025 (9YA)	Avg Price 2024 (£)	% Chg '24 vs '25	% Chg. 2016 vs 2025 (9YA)
TOTAL SEAFOOD	4,472,647	4,620,241	4,802,949	4.0	35.4	398,049	409,473	411,143	0.4	3.4	£11.68	3.5	31.0
TOTAL SALMON FRESH	1,226,701	1,306,535	1,414,354	8.3	66.3	58,785	61,748	68,656	11.2	28.4	£20.60	-2.6	29.6
WARM WATER PRAWNS FRESH	296,363	304,378	333,022	9.4	69.7	16,343	16,535	17,812	7.7	46.9	£18.70	1.6	15.5
COD FRESH	239,844	256,108	263,472	2.9	39.1	19,572	21,054	20,637	-2.0	29.8	£12.77	5.0	7.2
MIXED SEAFOOD FRESH	187,596	195,273	204,001	4.5	51.0	15,202	15,828	16,261	2.7	2.0	£12.55	1.7	48.0
HADDOCK FRESH	169,031	171,377	164,071	-4.3	4.8	13,755	14,217	12,812	-9.9	-7.7	£12.81	6.2	13.5
COLD WATER PRAWNS FRESH	121,929	127,543	126,745	-0.6	-7.7	7,920	7,905	7,518	-4.9	-27.6	£16.86	4.5	27.6
SEA BASS FRESH	83,737	86,861	92,348	6.3	73.2	4,460	4,800	4,876	1.6	43.2	£18.94	4.7	20.9
MACKEREL FRESH	69,228	77,529	84,297	8.7	11.5	6,328	6,615	6,701	1.3	-30.8	£12.58	7.3	61.1
TUNA FRESH	43,980	49,434	58,924	19.2	40.9	3,516	3,637	4,024	10.6	34.8	£14.65	7.7	4.6
CRABSTICK FRESH	40,178	36,656	36,060	-1.6	38.7	9,317	8,123	7,966	-1.9	32.4	£4.53	0.3	4.8

OTHER FRESH	27,336	27,064	35,365	30.7	-44.4	2,751	2,533	2,376	-6.2	-67.3	£14.89	39.3	69.8
BASA FRESH	30,268	31,641	29,578	-6.5	125.9	2,987	3,284	3,143	-4.3	150.9	£9.41	-2.3	-10.0
TROUT FRESH	21,263	26,562	28,989	9.1	-15.8	1,059	1,342	1,391	3.7	-54.2	£20.83	5.3	83.8
MUSSELS FRESH	23,528	23,941	23,846	-0.4	19.6	4,176	4,251	3,985	-6.3	7.6	£5.99	6.3	11.1
POLLOCK FRESH	19,350	20,646	20,628	-0.1	213.5	3,050	3,210	3,185	-0.8	162.2	£6.48	0.7	19.6
CRAB FRESH	14,617	14,360	16,378	14.1	-26.9	391	392	411	5.0	-64.4	£39.83	8.6	105.3
SCALLOPS FRESH	11,944	14,784	15,656	5.9	18.5	459	640	631	-1.4	3.0	£24.80	7.4	15.1
HAKE FRESH	9,774	10,102	10,758	6.5	53.1	667	665	746	12.2	26.2	£14.42	-5.0	21.3
PLAICE FRESH	10,825	10,006	10,320	3.1	-53.4	694	611	596	-2.4	-70.5	£17.31	5.7	57.8

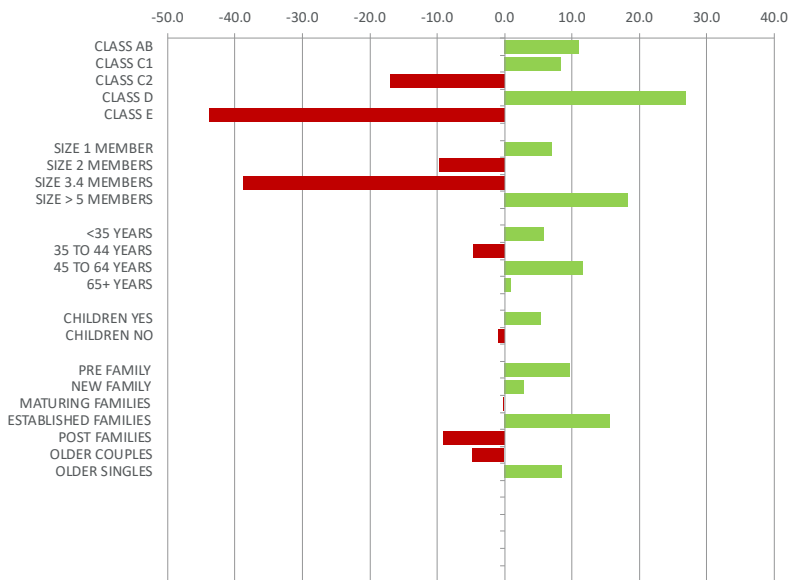
Nielsen Scantrack YE 04.10.25): 'Other 'is where the seafood species is not identified i.e., ' fish fingers or 'fish' pie.

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.

Compared to 2016, seafood has become a more affluent purchase, with the lowest income shoppers continuing to trade out of chilled seafood, balanced by a substantial increase in the highest and middle-income shoppers. There was also a significant shift to larger households with children, purchasing chilled seafood.

Change in chilled seafood demographics (volume) 2025 vs 2016 (%) (Figure10)



Nielsen Homescan YE 04.10.25

2025 seafood demographics % shoppers by volume (Figure 11)

	TOTAL FISH	AMBIENT	CHILLED	FROZEN	SUSHI
CLASS AB	32.4	29.7	36.7	28.5	31.4
CLASS C1	29.6	29.8	29.6	29.6	32.0
CLASS C2	16.4	18.0	14.9	17.3	11.5
CLASS D	13.4	13.6	11.9	15.2	12.3
CLASS E	8.2	8.9	6.9	9.4	12.7
SIZE 1 MEMBER	25.7	25.0	29.7	20.8	32.3
SIZE 2 MEMBERS	37.6	34.4	41.4	34.5	26.1
SIZE 3 MEMBERS	15.6	16.5	13.9	17.5	19.8
SIZE 4 MEMBERS	14.0	15.5	10.7	17.4	15.2
SIZE > 5 MEMBERS	7.1	8.6	4.3	9.9	6.6
<35 YEARS	12.0	14.7	9.8	13.2	22.3
35 TO 44 YEARS	16.2	17.9	13.1	19.1	23.4
45 TO 54 YEARS	16.6	18.2	15.0	17.7	17.3
55-64 yrs	19.1	19.8	18.7	19.1	17.8
65+ YEARS	36.2	29.5	43.5	30.9	19.2
CHILDREN YES	23.2	25.7	16.8	30.1	29.5
CHILDREN NO	76.8	74.3	83.2	69.9	70.5
PRE FAMILY	6.6	8.4	6.3	5.8	14.2
NEW FAMILY	4.5	4.7	3.6	5.5	4.6
MATURING FAMILIES	12.1	13.1	8.1	16.8	16.6
ESTABLISHED FAMILIES	9.6	11.6	7.5	11.0	13.1
POST FAMILIES	14.8	15.8	14.8	14.1	18.7
OLDER COUPLES	34.3	29.9	37.9	32.4	16.3
OLDER SINGLES	18.2	16.6	21.8	14.5	16.4
Female	70.9	72.5	69.4	71.8	72.7
Male	29.1	27.5	30.6	28.2	27.3

Nielsen Homescan YE 04.10.25

Executive Summary/Conclusion

Since returning to full growth mid-2024, chilled seafood had continued to grow, driving seafood volume sales with a little help from ambient. In the 52 wks. to 4th October 2025, chilled seafood remained in full growth, worth £3.06bn (+6.2%) with a volume of 188,977 tonnes (+3.3%); and an average price of £16.17/kg (+2.8%).

In October 2025, chilled seafood continues to take over 60% of the seafood category. Chilled value share grew to 63.6% (+1.3pp), taking share from frozen. By volume, chilled seafood took a 46.0% (+1.3pp) share of the category, gaining share from frozen as shoppers look for perceived quality

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per trip, spending £5.23; buying chilled seafood 19.1 times per year, spending a total of £108.02, equating to 6.9kg over the year

Shoppers have turned to more premium chilled products, as many more chilled segments returned to full growth. Cheaper segments were in volume decline, including chilled cakes, breaded, dusted and fingers. Prepared, sushi and battered segments showed the highest volume growth of up to +9%, whilst chilled fingers had the highest volume decline of -7.9%. Some chilled segments were also in volume growth over the long term (9 years to 4th October 2025). Chilled batter (+466%), sushi (+131%) and fingers (+85%) showed the highest volume growth; whilst chilled dusted (-35%) and chilled sauce (-19%), saw the greatest volume declines.

Salmon continues to dominate the chilled seafood sector, retaining a 46% value share of chilled seafood, selling over four times its nearest competitor, warm water prawns (Figure 7). Smoked salmon makes up around a quarter (23%) of chilled salmon volume sales, down slightly on last year. This year, consumption of chilled salmon, warm water prawns and tuna increased the most out of the top chilled seafood species. However, the highest volume growth was seen in chilled hake. The largest declines were seen in chilled haddock, cold-water prawns and 'other' (cheaper products where the seafood species is not mentioned) (Figure 8/9).

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Compared to 2016, chilled seafood has become a more affluent purchase, with the lowest income shoppers continuing to trade out of chilled seafood, balanced by a substantial increase in the highest and middle-income shoppers. There was also a significant shift to larger households with children, purchasing chilled seafood.

Data:

- Nielsen Scantrack – UK EPOS from key retailers (including data from discounters Aldi & Lidl and N. Ireland) excludes seafood sandwiches
- Nielsen Homescan – GB consumer panel of 30,000 households excludes seafood sandwiches
- Defra Family Food Survey 2024 release

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



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