

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



Farmed Seafood in Multiple Retail 2025

A market insight analysis (20m read)

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May 2025



Executive Summary

Farmed or aquacultured seafood plays an increasingly important role in feeding the world. Overall, the global fisheries and aquaculture sector has seen significant expansion in the past four decades.

- **Growing Supply:** In 2022, global farming of aquatic animals produced an estimated 94 million tonnes, representing 51% of the total consumption, surpassing capture fisheries for the first time.
- **Changing Tastes:** . The past 40 years have seen a significant change in the type of seafood eaten in the UK. Since the 1970's, there has been a shift away from traditional wild caught white fish species including cod and haddock, towards farmed seafood species such as salmon and warm water prawns. More recently, the farmed 'white fish' species like basa, seabass and sea bream have become popular alternatives to traditional wild capture white fish species.
- **Growing Share:** In the 52 wks. to April 2025, farmed seafood grew share of the UK top five bestselling seafood species. Overall, farmed species have an estimated 47% (+1.2%) and 30% (+1.4%) share of value and volume, respectively of the total UK seafood retail category.
- **Premiumisation:** It's a common consumer misconception that farmed seafood is a cheap and cheerful option. In April 2025, several farmed species have an average price over double that of cod or haddock. Of the 'top-five' species, the average price of the farmed species is £18.49/kg, nearly 140% higher than the average price of the wild caught species (£7.85).
- **Find me in the Chilled Isle:** Farmed seafood is most strongly represented in the chilled sector, growing share to a significant 73% (+1pp) by value and 62% (+1pp) share by volume of the top 5 chilled species.
- **Natural:** Farmed seafood dominates the natural segment increasing its share with a 82% (+1pp) share of the 'top-five' natural species; worth £1.35bn and 64,834 tonnes.
- **Salmon and Prawns:** Salmon continues to dominate the UK seafood category, accounting for an estimated 31.4% (+0.7pp) of all seafood sales by value and 18.2% (+0.8pp) by volume; and now makes up 60% of all farmed species volume purchases.

Understanding the changing landscape of seafood consumption and consumer preferences is key to running a successful seafood business. This factsheet covers the key global trends in aquaculture, focusing on the changing shopper trends and consumption patterns of farmed species in UK multiple retail to May 2025.

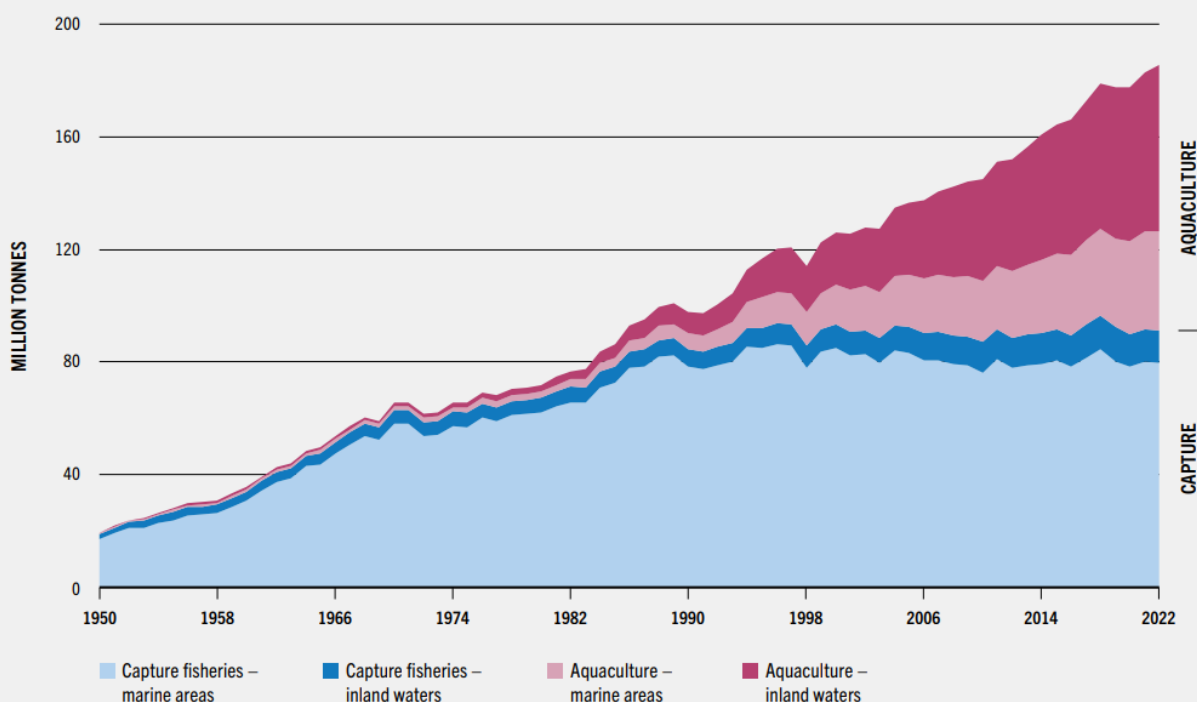
What is farmed seafood?

Aquaculture is the farming, rearing or cultivation of aquatic animals and plants for food. Aquaculture occurs both inland, for freshwater species and in coastal brackish / seawater for marine species. Typically, marine fish are grown in net pens in the sea or estuaries whilst shellfish can be grown by “seeding” small shellfish on the sea-floor or by growing them on ropes, or in floating cages. A comprehensive overview of aquaculture standards, processes and key species can be found on Seafish Aquaculture Profiles – <https://seafish.org/aquaculture-profiles/>

Farmed seafood - a global perspective

Farmed or aquacultured seafood plays an increasingly important role in feeding the world. Overall, the global fisheries and aquaculture sector has seen significant expansion in the past four decades. In 2022, the global production of aquatic animals reached a new world high of 185 million tonnes (live weight equivalent), an increase of 4 percent from 2020. Farming of aquatic animals produced an estimated 94 million tonnes, representing 51 percent of the total, surpassing for the first time capture fisheries, which produced 91 million tonnes (49 percent). The Food and Agriculture Organisation of the United Nations (FAO), produce a biennial summary report ‘The State of World Fisheries and Aquaculture’ the latest released in 2024

FIGURE 1 WORLD FISHERIES AND AQUACULTURE PRODUCTION OF AQUATIC ANIMALS



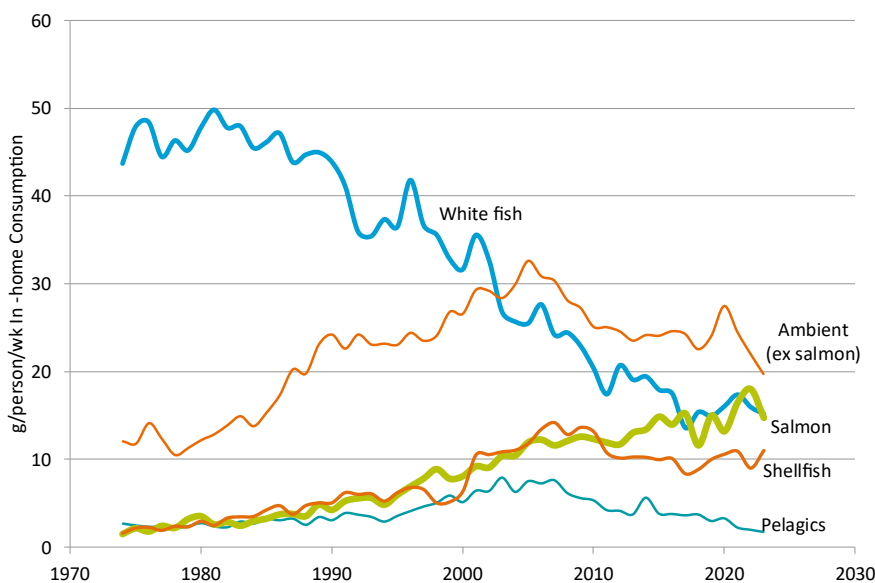
NOTES: Aquatic animals excluding aquatic mammals, crocodiles, alligators, caimans, aquatic products (corals, pearls, shells and sponges) and algae. Data expressed in live weight equivalent.

SOURCE: FAO. 2024. FishStat: Global production by production source 1950–2022. [Accessed on 29 March 2024]. In: FishStatJ. Available at: www.fao.org/fishery/en/statistics/software/fishstatj. Licence: CC-BY-4.0.

Changing tastes in UK seafood

The past 40 years has seen a dramatic change in the type of seafood eaten by UK households. Since the 1980s, there has been a significant shift away from traditional wild caught white fish species including cod and haddock, towards farmed seafood species such as salmon and warm water prawns. And more recently, the farmed ‘white fish’ species including basa, seabass and sea bream and have become popular alternatives to the traditional wild capture white fish species.

Long Term trends UK Seafood Eaten In-Home to 2023



Defra Family Food – Oct 2024 release



Chilled and frozen whitefish consumption fell -67% from 1988 to 2019 pre COVID-19, compared to chilled salmon up +321% (Defra family food). Post COVID-19, warm water prawns and salmon have continued to grow, despite being typically over double (136%) the price of total cod. However, cod and pollock have benefited from the growth of frozen coated sales, with battered in particular performing strongly as consumers ‘dine in’ in response to significant inflation in the fish & chip shop sector.

Current retail performance of farmed seafood

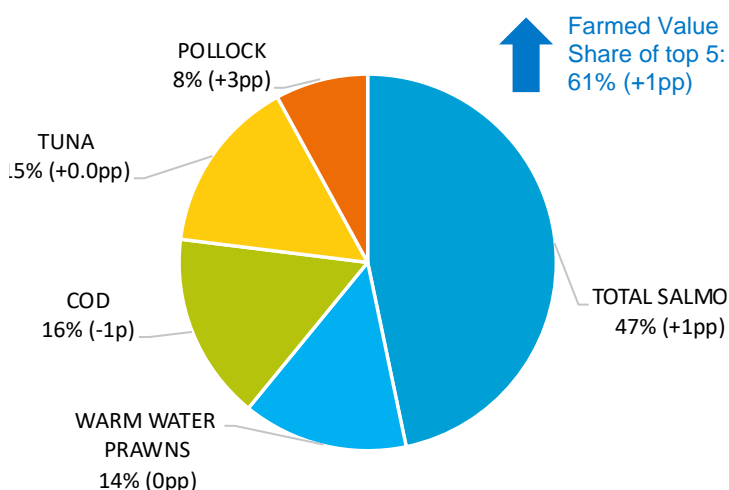
It may be a surprise for UK shoppers to know how much of the seafood they purchase is farmed, and indeed which species are farmed. Many shoppers are aware of the existence of farmed salmon and prawns, but most assume their purchases are wild caught as it's not common practice to have 'farmed' in a prominent place on front of pack. Shoppers are less likely to associate aquaculture with other commonly farmed species such as seabass, oysters, mussels, and turbot.

Traceability data is not available to establish the precise ratio of farmed to wild for each species on retail sale. But import statistics, country of origin and aquaculture production figures, can be used to estimate whether the majority of a given species i.e., salmon, warm water prawns basa, seabass and sea bream are farmed. For the purposes of this factsheet, the assumption has been made that where most of the supply is estimated to be farmed, the species is classified as farmed.

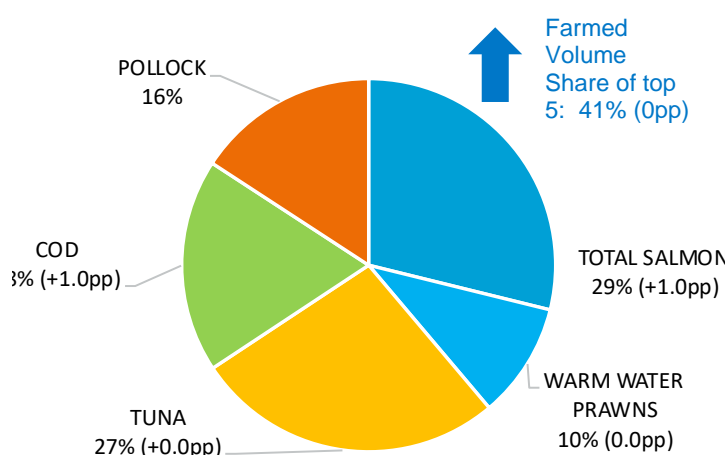
In the 52 wks. to April 2025, farmed seafood grew share of the UK top five bestselling seafood species, accounting for an estimated 61% (+1%) of sales by value, and 41% (+0%) by volume. Farmed seafood consumption and share of the 'top-five' continues to grow over the long term, with farmed increasing volume share by 8.3% from 2016 to 2024. In the 52 weeks to 12th April 2025, UK farmed seafood share of the 'top-five' seafood species was worth £1.92bn (+5.0%) with 101,000 tonnes (+5.3%).

For the total seafood category (all seafood species, products, and formats), farmed species have an estimated 47% (+1.2%) and 30% (+1.4%) share of value and volume respectively.

Farmed seafood value share of 'top-five' species 2025



Farmed seafood volume share of 'top-five' species 2025



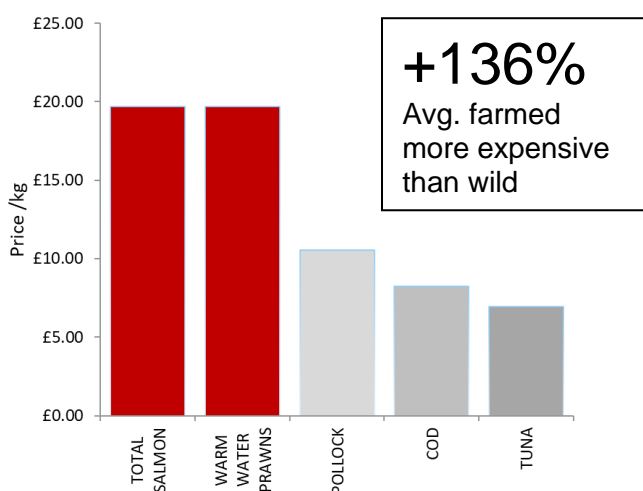
Nielsen Scantrack YE 12.4.25

Why is farmed so popular?

It’s a common consumer misconception that farmed seafood is a cheap and cheerful option. In April 2025, several farmed species have an average price of over double that of cod or haddock. Of the ‘top-five’ species, the average price of the farmed species is £18.49/kg, nearly 140% higher than the average price of the wild caught species (£7.85).

In surveys, seafood shoppers state they are prepared to pay more for fresher/higher quality seafood. It may be that shoppers are finding the consistency and value for money they are looking for in farmed species.

Average price of farmed vs wild in top 5 total retail 2025



Nielsen Scantrack YE 12.4.24

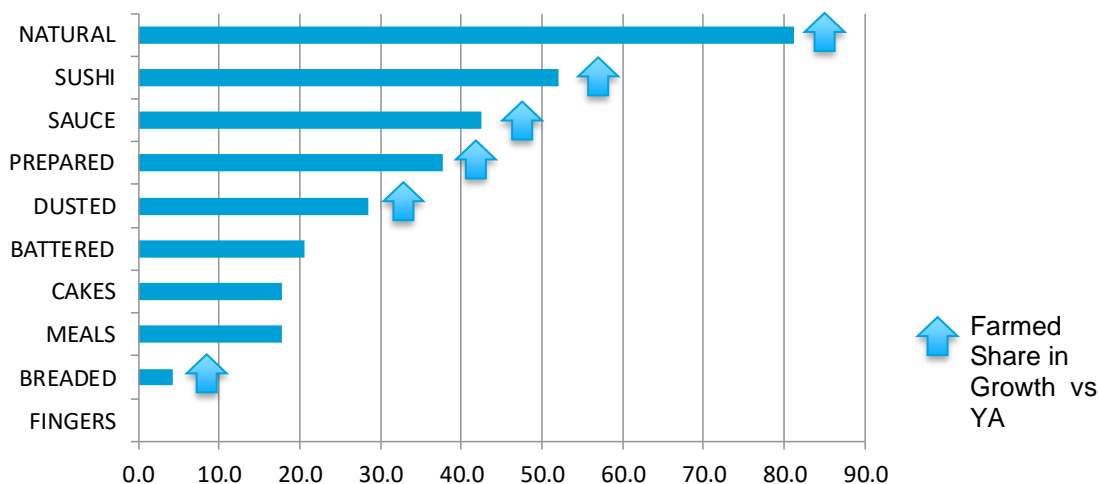
Farmed seafood sector performance

Farmed seafood is most strongly represented in the chilled sector, growing share to a significant 73% (+1pp) by value and 62% (+1pp) share by volume of the top 5 chilled species. This is also without taking into account that mixed seafood ranked at number four, which typically contains a large proportion of farmed salmon and sometimes mussels and warm water prawns. Chilled salmon dominates as the most popular chilled species, with warm water prawns second. Farmed species are less prominent in the frozen and ambient sectors.

Farmed seafood segment performance

Farmed seafood species, typically salmon, warm water prawns and basa, are often ranked in the ‘top-five’ species of most of the seafood category segments listed by NielsenIQ. However, farmed species are not represented in the ‘fingers’ segment which is dominated by cod, haddock and pollock. The strongest segments for farmed seafood representation are ‘natural’ and ‘sushi’ where they make up to 80% of the segment. The other segments have a similar share of farmed seafood typically between 10% to 35% in the top 5.

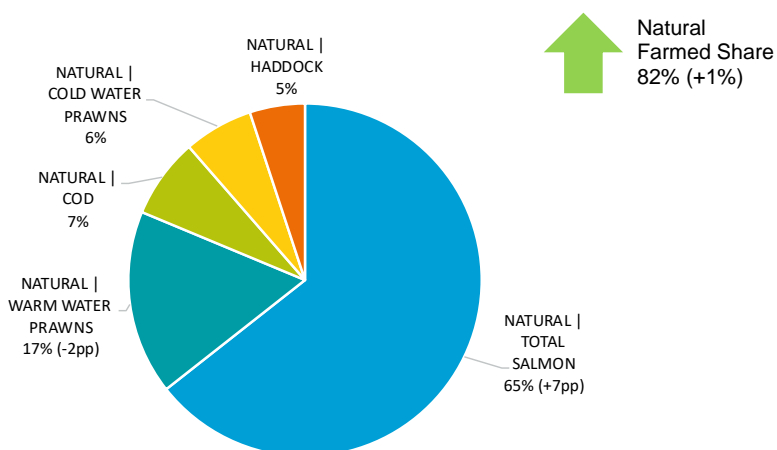
Farmed seafood share of ‘top-five’ by segment (value) 2025



Nielsen Scantrack YE 12.4.25

Natural is the largest seafood segment, making up the majority of retail seafood sales. Farmed seafood dominates the natural segment increasing its share with a 82% (+1pp) share of the ‘top-five’ natural species; worth £1.35bn and 64,834 tonnes. Salmon makes up the majority with 65% (+7pp) increasing share vs pre COVID-19, and warm water prawns taking 17% (-2pp) of the natural segment ‘top-five’. Over the past year, farmed seafood share increased all seafood segments, except for battered, cakes and meals.

Natural segment – farmed share of ‘top-five’ species UK (Value) 2025



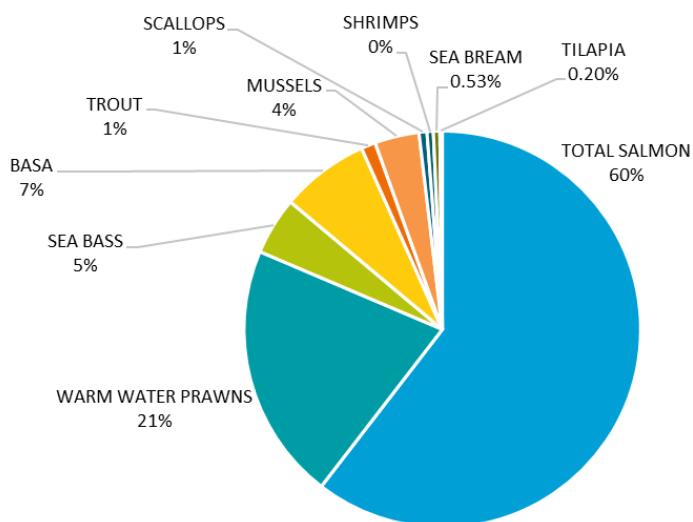
Nielsen Scantrack YE 12.4.25

Farmed species performance

Salmon, warm water prawns, basa, seabass and mussels (displacing trout) remain the top five most popular farmed seafood species in UK multiple retail.

Salmon continues to dominate the UK seafood category, and continues to grow share accounting for an estimated 31.4% (+0.7pp) of all seafood sales by value and 18.2% (+0.8pp) by volume; and now makes up 60% of all farmed species volume purchases. In the 52wks to April 2025, salmon saw robust growth, worth £1.48bn, (+5.2%) with 74,831 tonnes (-6.1%).

Top 10 farmed species share 2025 (volume)



Scantrack YE 12.4.25

Salmon is the only species where the Nielsen data allows an estimation of farmed vs wild to be made. In the 52wks to 12th April 2025, farmed salmon made up over 92% of salmon sold in UK retail by value. The amount of wild caught salmon consumed continues to decrease year-on-year despite being significantly cheaper than farmed.

Many farmed species were in volume growth in the 52 wks. to April 2025 as the seafood category continued its 2024 volume recovery into 2025.

Compared to last year, the top selling farmed species; salmon, warm water prawns and seabass continued to grow strongly whilst scallop, tilapia and halibut showed the highest volume growth, but from a small base.

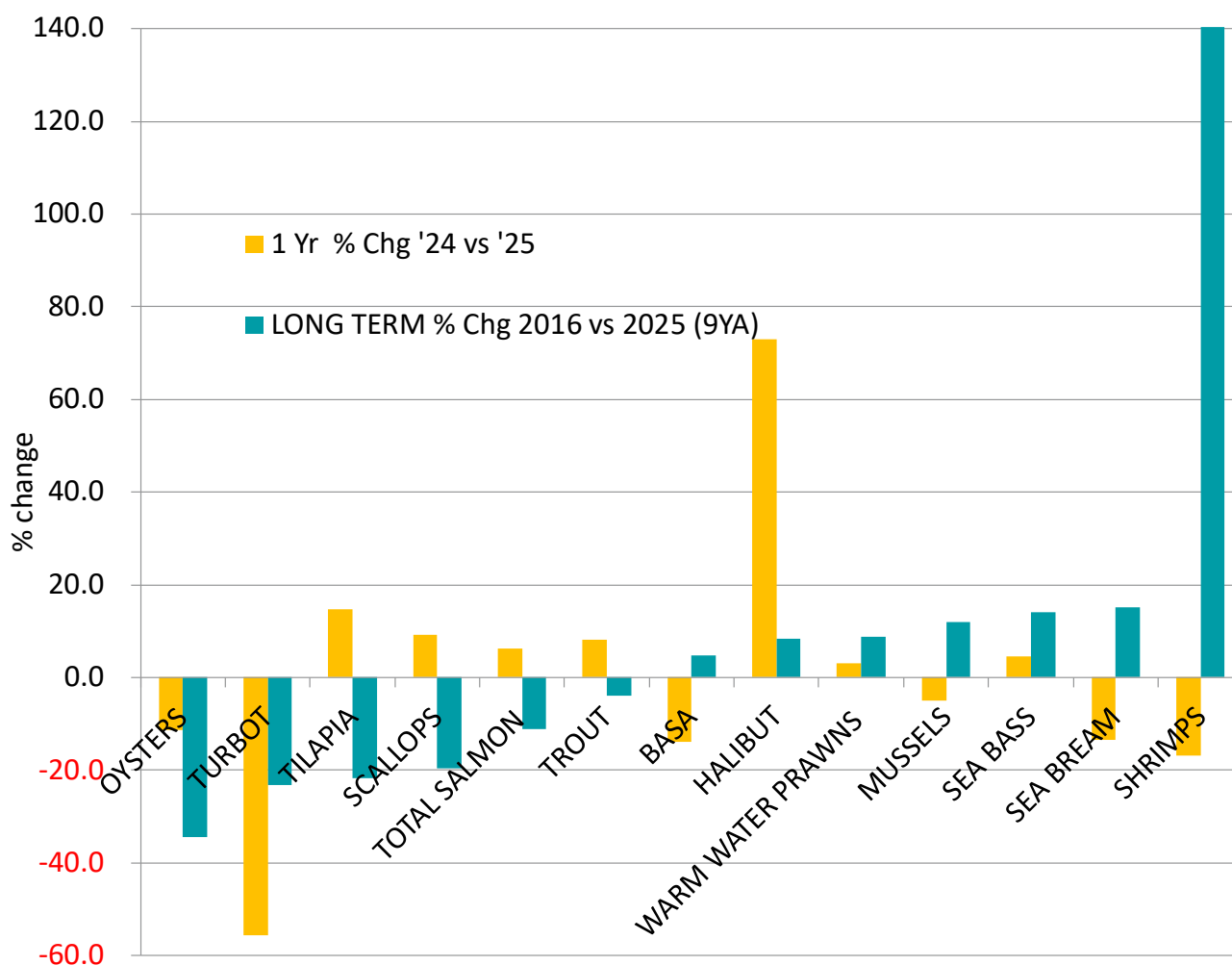
Over the long term, from 2016 to 2025, salmon, warmwater prawns and seabass also performed strongly, with warm water prawns and seabass growing UK retail volume sales by up to +61%. It is these aspirational 'dine in' species that consumers turn to when choosing to cook at home to save money, as an alternative to takeaways and dining out.

UK Farmed Species Performance 2025

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2022 52wks to 12.4.23	2023 52wks to 12.4.24	2024 52wks to 12.4.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)*	2022 52wks to 12.4.23	2023 52wks to 12.4.24	2024 52wks to 12.4.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)*	Avg Price 2025	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)*
TOTAL SEAFOOD	4,342,501	4,564,733	4,700,024	3.0	32.7	396,409	404,101	410,662	1.6	3.5	£11.45	1.3	28.2
TOTAL SALMON	1,293,056	1,402,125	1,475,534	5.2	48.6	70,276	70,501	74,831	6.1	6.8	£19.72	-0.9	39.2
WARM WATER PRAWNS	429,584	429,175	447,833	4.3	58.3	26,597	25,182	25,943	3.0	33.5	£17.26	1.3	18.6
SEA BASS	89,459	93,361	98,638	5.7	77.6	5,302	5,569	5,824	4.6	60.8	£16.94	1.0	10.5
BASA	83,548	91,042	81,243	-10.8	49.6	10,031	10,386	8,934	-14.0	15.2	£9.09	3.7	29.7
TROUT	22,734	24,890	28,996	16.5	-17.1	1,246	1,338	1,448	8.2	-53.4	£20.03	7.7	77.9
MUSSELS	28,447	28,238	27,571	-2.4	15.2	4,849	4,716	4,480	-5.0	6.0	£6.16	2.8	8.7
SCALLOPS	18,208	18,467	20,166	9.2	-2.4	712	733	801	9.3	-17.9	£25.17	-0.1	18.9
SHRIMPS	14,121	13,401	10,725	-20.0	159.9	796	765	636	-16.8	396.8	£16.85	-3.8	-47.7
SEA BREAM	9,189	11,394	10,078	-11.6	-32.7	636	756	653	-13.6	-35.9	£15.43	2.3	5.1
TILAPIA	2,064	2,282	2,456	7.6	127.3	198	211	242	14.7	139.3	£10.14	-6.1	-5.0
HALIBUT	2,395	2,018	2,189	8.5	115.9	65	46	80	73.0	215.3	£27.51	-37.3	-31.5
OYSTERS	1,903	1,812	1,839	1.5	7.8	123	95	84	-11.4	-3.3	£21.94	14.6	11.5
TURBOT	116	101	43	-57.2	-86.4	1	1	1	-55.6	-97.1	£80.98	-3.6	362.7

Nielsen Scantrack YE 12.4.25

Farmed seafood species performance to 2025 (Volume)



Nielsen Scantrack YE 12.4.25

The farmed seafood shopper

In the 52 weeks to April 2025, a similar proportion of people purchased salmon, more often, spending more on smaller-sized baskets. Key performance indicators (KPIs) show warm water prawns as the only farmed species growing the number of shoppers. However, in general, for most farmed species, the trend is for fewer shoppers, buying more often, with smaller basket sizes compared to last year.

Top farmed species KPI's 2025

	THIS YEAR						LAST YEAR						% CHG vs YA					
	Annual			Per Occasion			Annual			Per Occasion			Annual			Per Occasion		
	Penetration	Occasions per Buyer	Value per Buyer	KILO per Buyer	Value per Occasion	KILO per Occasion	Penetration YA	Occasions per Buyer YA	Value per Buyer YA	KILO per Buyer YA	Value per Occasion YA	KILO per Occasion YA	Penetration vs YA (% Change)	Occasions per Buyer vs YA (% Change)	Value per Buyer vs YA (% Change)	KILO per Buyer vs YA (% Change)	Value per Occasion vs YA (% Change)	KILO per Occasion vs YA (% Change)
TOTAL SEAFOOD	95.2	27.9	144.9	13.1	£5.19	0.47	95.2	27.5	£141.65	13.1	£5.16	0.5	0.0	1.6	2.3	-0.2	0.7	-1.8
TOTAL SALMON	64.9	11.1	63.0	3.3	£5.69	0.30	64.9	10.8	£61.21	3.3	£5.66	0.3	0.0	2.3	2.2	0.5	-0.1	
WARM WATER PRAWNS	46.4	6.1	26.4	1.6	£4.34	0.27	45.8	6.0	£26.16	1.6	£4.35	0.3	1.4	0.9	0.7	-1.6	-0.2	-2.5
SEA BASS	13.0	4.2	21.6	1.2	£5.15	0.30	13.9	3.6	£18.52	1.1	£5.17	0.3	-6.5	17.4	16.9	10.3	-0.4	-6.0
BASA	22.3	3.37	12.1	1.3	£3.58	0.39	26.5	3.3	£11.49	1.3	£3.45	0.4	-15.9	1.2	5.0	0.9	3.8	-0.3
TROUT	5.9	2.867	14.4	0.6	£5.04	0.22	6.0	2.6	£13.15	0.6	£5.11	0.2	-0.9	11.4	9.8	6.0	-1.4	-4.8
SEA BREAM	1.4	2.424	12.8	0.8	£5.27	0.32	2.0	2.2	£12.08	0.8	£5.39	0.4	-33.2	8.1	5.8	-5.9	-2.2	-13.0
MUSSELS	9.9	3.189	8.9	1.5	£2.81	0.48	10.1	3.1	£8.30	1.5	£2.70	0.5	-2.0	3.8	7.8	3.8	3.8	-0.0

Nielsen Homescan YE 12.4.25

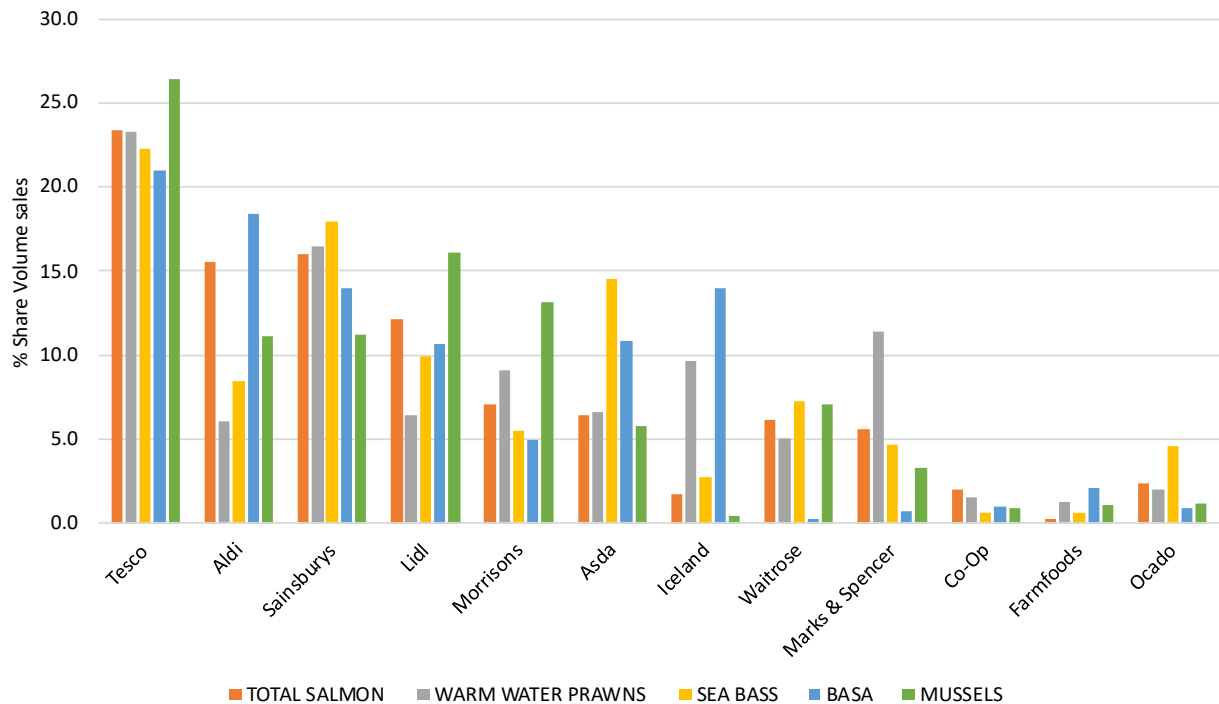
Demographics show that most farmed seafood shoppers remain significantly more affluent than the average seafood shopper, a trend which has increased compared to pre COVID-19. Farmed seafood shoppers also tend to belong to smaller one or two member households where it's less common for children to be present, again a trend which has increased post COVID-19. Where children are present, they are more likely to be in the 0 to 4 year age bracket, with children in the mid age group missing out. Farmed seafood also over indexes in pre-family and older couples/singles purchases, being less important to new, maturing, and established families.

Farmed Seafood demographics % shoppers 2025 (volume)

	TOTAL FISH	TOTAL SALMON	WARM WATER PRAWNS	SEA BASS	BASA	MUSSELS
AB	32	38	37	42	30	36
C1	30	30	30	30	31	30
C2	16	14	14	16	17	14
D	13	11	12	8	15	12
E	8	6	7	4	8	7
(EU) 1 Member HH's	26	28	30	24	24	32
(EU) 2 Member HH's	38	41	39	43	41	39
(EU) 3 Member HH's	16	15	14	16	15	13
(EU) 4 Member HH's	14	12	11	12	14	11
(EU) 5+ Member HH's	7	5	5	5	7	4
<34	12	13	11	15	12	9
35-44 yrs	16	14	15	13	14	15
45-54 years	17	15	15	16	15	14
55-64 yrs	19	19	19	15	19	15
65 yrs+	36	39	39	42	40	47
Children present	23	19	19	20	21	19
No Children Present	77	81	81	80	79	81
Children aged 0-4 present	8	6	6	7	7	6
Children aged 5-10 present	13	10	10	11	11	8
Children aged 11-15 present	12	9	9	8	10	10
Pre-Family	7	8	7	9	7	6
New Families	4	4	4	4	5	4
Maturing Families	12	10	9	11	10	9
Established Families	10	8	9	7	8	8
Post Family	15	14	15	15	14	14
Older Couples	34	36	34	38	38	36
Older Singles	18	19	22	16	18	24
Female	71	72	70	70	71	69
Male	29	28	30	30	29	31

Nielsen Homescan YE 12.4.25

Farmed seafood retailer share of trade 2025 (value)



Nielsen Homescan YE 12.4.25

Interestingly, different retailers overtrade in different farmed seafood species linked to store demographics. Tesco is currently the largest seafood retailer by both volume and value, also taking the largest share of most farmed seafood species; whilst Sainsburys, Morrisons, Iceland and M&S overtrade in warm water prawns.

Data Sources: (%) values represent change from the previous year unless otherwise stated

Nielsen:

- Scantrack – UK EPOS from key retailers, excludes seafood sandwiches
- 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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