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

Total Seafood in Multiple Retail 2025

A market insight analysis (20m read)

R. Watson

July 2025

Total Seafood in Multiple Retail 2025

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, 'total seafood' trends at the sector, segment and species level, along with changing shopper trends, key point indicators (KPI's) and demographics in multiple retail to June 2025.

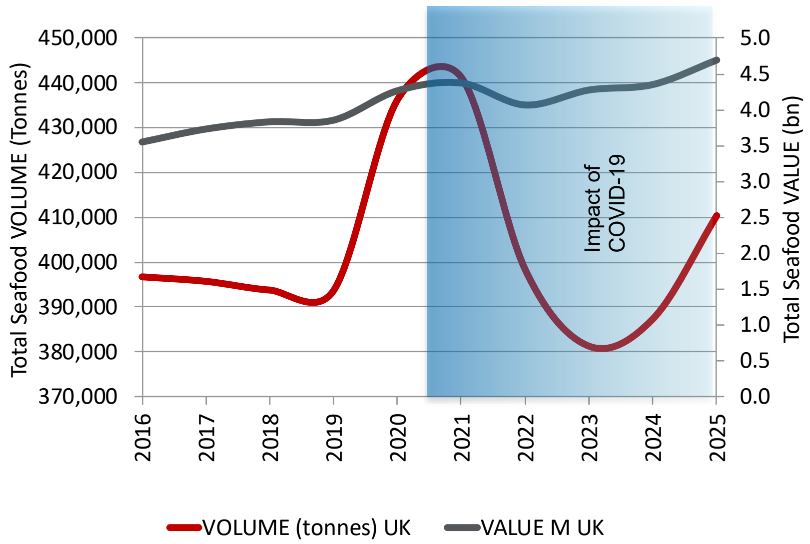
Historic retail seafood trends

The long-term data available to Seafish is GB excluding discounters, shows a -25% consumption decline in the 10 years to COVID-19, equating to around £5.5bn lost out of retail seafood sales. However, this is a worst-case scenario as discounters have been growing their share and seafood sales. From 2016, UK data, including discounters, have been available, which will be used going forward (Figure 1)

Prior to COVID-19, typically only the chilled seafood sector exhibited volume growth. In 2020, COVID-19 panic buying, home working, school closures and restrictions on foodservice resulted in significantly more in-home meal occasions, briefly boosting retail seafood sales by around 10% (Figure 2). Post COVID-19, any short periods of volume growth have typically come from frozen and ambient seafood. Frozen natural, prepared, and frozen coated seafood, such as breaded, battered cakes, and fingers, grew strongly. As a result, cheaper species, commonly used in coated products, such as pollock. (also, one of the main species in ‘other’ Nielsen coding) saw strong volume growth.

With the cost-of-living crisis and concern over Ukraine and the Middle East, the post COVID-19 years have been tough for seafood, seeing shoppers trade down to the cheapest seafood options, tinned tuna and fish fingers. However, falling seafood volume sales began to slow in the latter half of 2023, and seafood returned to full growth in early 2024, with chilled following mid-2024, and any volume growth has come from chilled and ambient since.

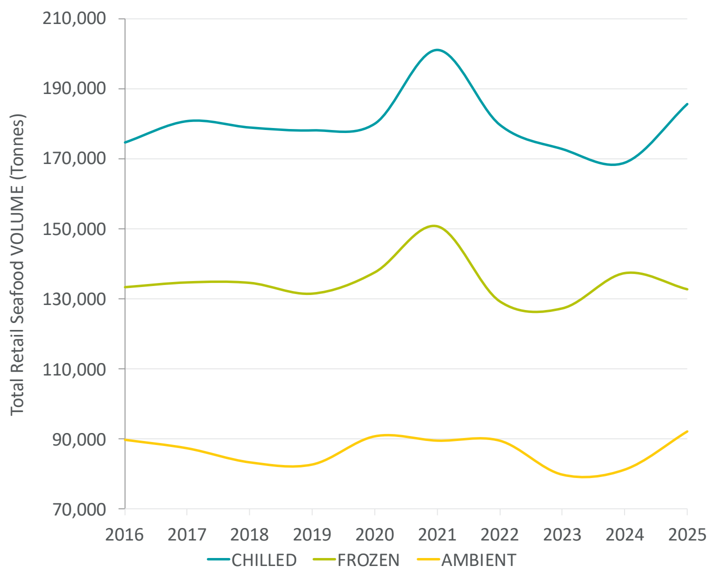
UK retail total seafood consumption trends 2025 (Figure 1)



Nielsen Scantrack YE 15.03.25

NB. Nielsen changed discounter data capture methodology in 2024, which had the effect of boosting the 2025 total seafood value by c5%

UK Retail Seafood Sector Consumption Trends to 2025 (Figure 2)



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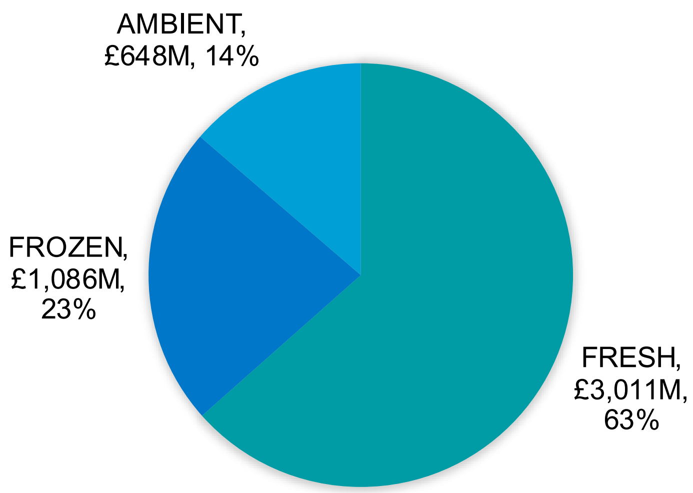
Current UK seafood retail performance

In the 52 weeks to 14th June 2025, the total seafood category showed modest inflation and remains in full growth, driven by chilled and ambient seafood, as frozen returned to decline.

UK seafood sales were worth £4.74bn (+3.5%), with a volume of 410,225 tonnes (+0.9%) and an average price of £11.57/kg (+2.6%). Seafood inflation has increased slightly, at +2.6% compared to +2.2% in June last year but now sits lower than the CPI for food and alcoholic beverages (+4.4%) once again.

UK Seafood Sector Share by Value 2025 (Figure 3)



Nielsen Scantrack YE 14.06.25

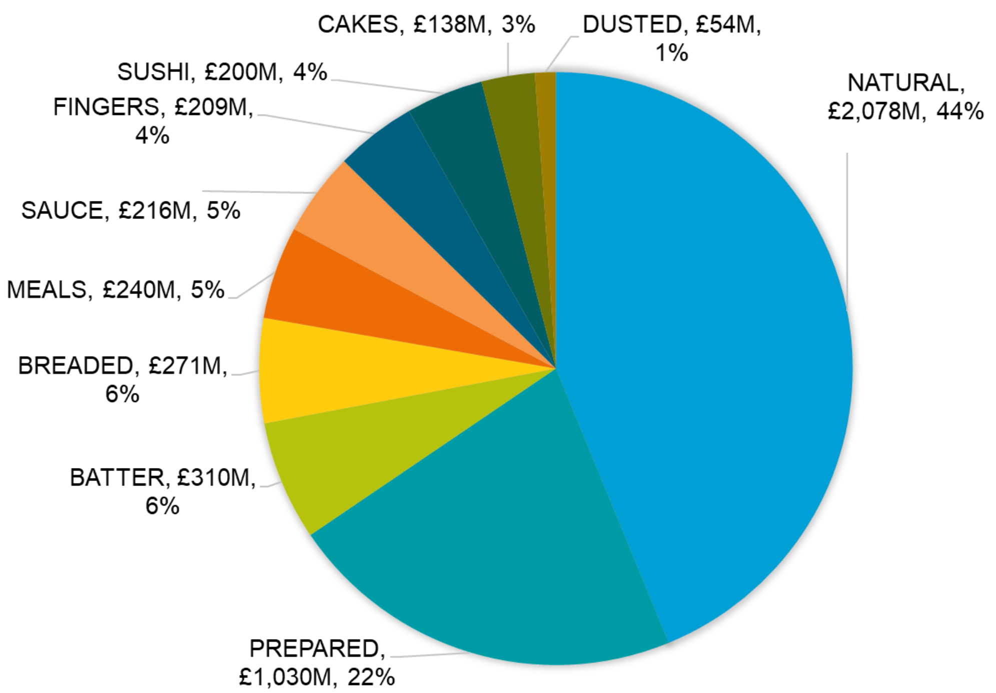
In the 52 weeks to June 2025, chilled (+1pp) (percentage point), and ambient seafood (+1pp) increased share from the previous year, whilst frozen (-2pp) declined. Chilled seafood returned to full growth in July 2024 and has been driving overall category growth (along with a smaller contribution from ambient seafood) since.

- Chilled seafood remains in full growth, showing strong volume growth and modest inflation, worth £3,010m (+6.1%) with a volume of 187,379 (+3.9%) tonnes and average price of £16.07/kg (+2.1%).
- Frozen seafood returned to decline last year, despite a relatively low average price, worth £1,085m (-2.4%) with a volume of 130,440 tonnes (-4.1%) and average price of £8.33/kg (+1.9%).
- Ambient seafood remains in full growth, showing healthy volume growth, worth £648m (+2.4%) with a volume of 92,407 tonnes (+2.4%) and average price at £7.02/kg (+0.0%).

Total seafood segment performance

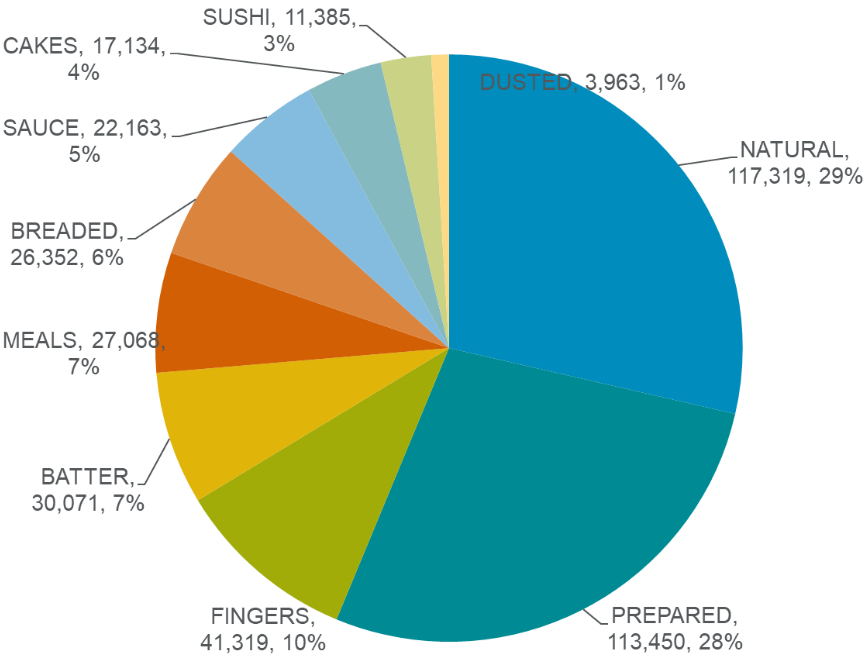
Total seafood can be split into 10 segments by product type (Figure 4/5). The total natural segment (no additional ingredients) continues to take the largest share, by both value 44% (+0pp) and volume 28% (+1.0pp), of the total UK seafood category. Total natural, along with the total prepared segment (where other items are present, e.g. cod and bacon kebabs), together make up nearly three-quarters of the retail seafood category by value. Historically, up until COVID-19, any consistent growth in the seafood category was driven by chilled natural seafood. The impact of COVID-19 saw the demand for prepared and coated seafood increase as part of quick and easy meal solutions, and the format stayed popular throughout the cost-of-living crisis due to its relatively low average price.

Segment Value Share of UK Total Seafood 2025 (Figure 4)



Nielsen Scantrack YE 14.06.25

Segment Volume Share (tonnes) of UK Total Seafood 2025 (Figure 5)



Nielsen Scantrack YE 14.06.25

This year, most segments were in volume growth, apart from the coated segments, breaded, fingers and cakes. and sauce. Battered (chilled) and sushi showed the highest volume growth with +7.0% and +8.4% respectively, as shoppers look for premium dine-in alternatives to fish and chips and foodservice. Dusted and fingers showed the highest volume decline of -11.9% and -8.9% respectively.

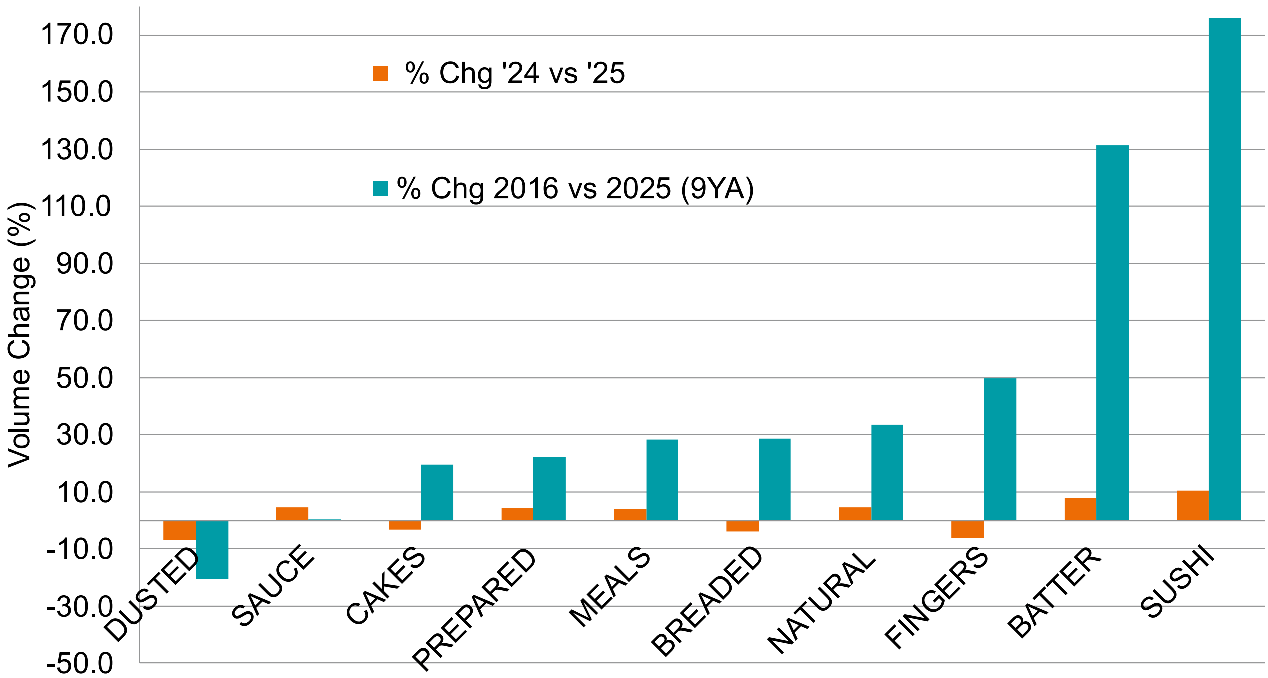
Over the long term (9 years to June 2025), sushi, fingers, and battered segments continue to show the highest growth, with sushi up 126% (Figure 7). Whilst dusted, meals and sauce continued to show the largest consumption decline. Battered, meals and sauce had some of the highest average price increases.

UK total seafood sector and segment performance to 2025 (Figure 6)

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2023 52wks to 21.6.23	2024 52wks to 21.6.24	2025 52wks to 21.6.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	2023 52wks to 21.6.23	2024 52wks to 21.6.24	2025 52wks to 21.6.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	Avg Price 2025 (£)	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)
TOTAL SEAFOOD	4,408,487	4,582,927	4,744,801	3.5	33.9	396,878	406,697	410,225	0.9	3.4	£11.57	2.6	29.5
FRESH	2,698,015	2,837,785	3,010,574	6.1	38.3	178,631	180,411	187,379	3.9	8.5	£16.07	2.1	27.5
FROZEN	1,109,883	1,112,129	1,085,844	-2.4	28.1	130,402	136,075	130,440	-4.1	-2.8	£8.33	1.9	31.7
AMBIENT	600,589	633,013	648,383	2.4	25.1	87,845	90,210	92,407	2.4	3.0	£7.02	-0.0	21.6
NATURAL	1,885,985	1,983,298	2,077,863	4.8	33.4	110,707	112,946	117,319	2.6	4.8	£17.71	0.9	27.3
PREPARED	967,234	989,044	1,030,413	4.2	22.2	110,649	110,575	113,450	3.9	-0.6	£9.08	1.5	22.9
BATTER	261,606	287,476	309,654	7.7	131.4	26,444	28,103	30,071	7.0	40.7	£10.30	0.7	64.5
BREADED	276,015	282,033	270,862	-4.0	28.6	27,743	27,695	26,352	-4.9	-6.6	£10.28	0.9	37.8
MEALS	229,899	230,621	239,551	3.9	28.2	28,848	27,408	27,068	-1.2	-16.7	£8.85	5.2	53.9
SAUCE	200,408	206,388	215,673	4.5	0.1	21,988	21,759	22,163	1.9	-15.2	£9.73	2.6	18.1
FINGERS	220,485	223,159	209,359	-6.2	49.9	37,735	45,175	41,319	-8.5	30.2	£5.07	2.6	15.2
SUSHI	167,909	180,547	199,670	10.6	175.9	9,905	10,507	11,385	8.4	125.5	£17.54	2.1	22.3
CAKES	138,246	142,513	137,880	-3.3	19.6	17,903	18,030	17,134	-5.0	-6.1	£8.05	1.8	27.3
DUSTED	60,700	57,847	53,875	-6.9	-20.5	4,957	4,499	3,963	-11.9	-45.9	£13.59	5.7	46.8

Nielsen Scantrack YE 14.06.25

Seafood segment volume performance to 2025 (Figure 7)



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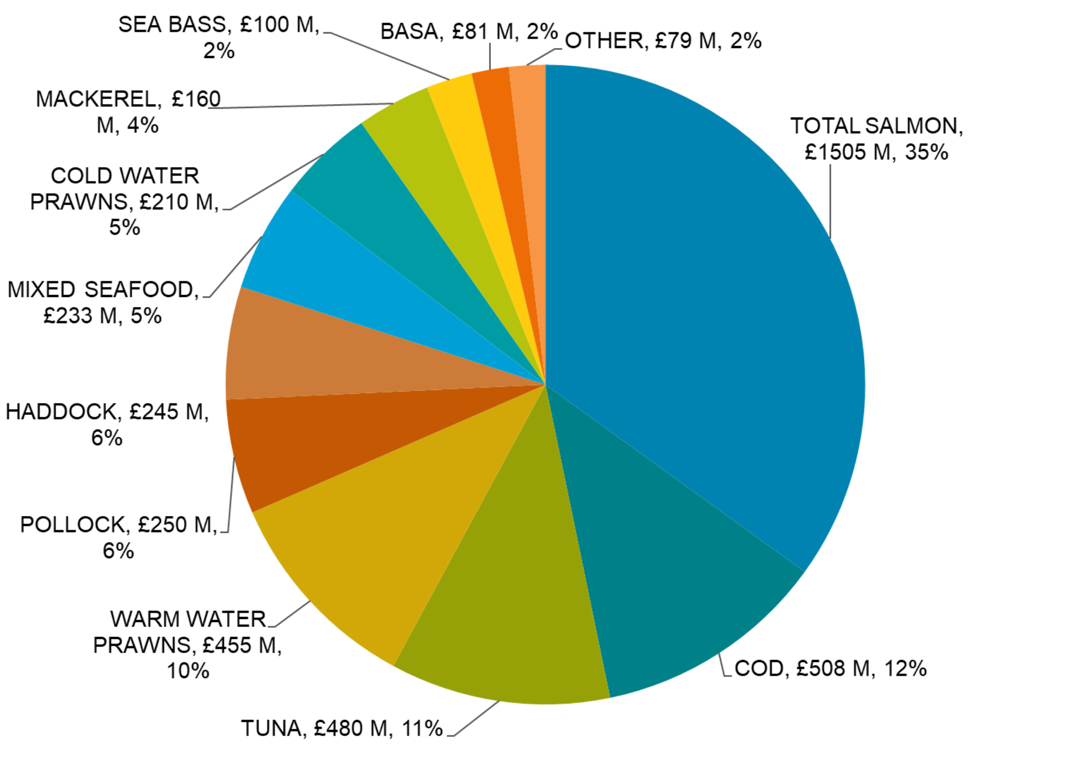
Total species performance

The top 5 species, salmon, tuna, cod, pollock and warm water prawns (displacing 'other' typically A. pollock/basa) continue to make up most of the volume of seafood sold in retail (Figure 8). This year, pollock maintains its position above 'mixed seafood' and haddock in the value species rankings due to its popularity in cheaper products, also knocking haddock and mixed seafood out of the top 5 by volume. Salmon retains the top spot by both volume and value, dominating retail seafood sales with a growing 35% (+1pp) value share of the top 12 species. With over double the value of cod, salmon sales stood at £1.51bn (+6.8%) and 76,415 tonnes (+7.5%) in the 52 weeks to June 2025. Cod continues to lose value share with 12% (-1pp), currently the second most valuable UK species.

Top 12 species value share of UK total seafood (2025) (Figure 8)



Top 5 species by Value		Top 5 species by Volume (t)	
SALMON	£1505.4M	SALMON	76,415
COD	£508.4M	TUNA	69,999
TUNA	£479.6M	COD	47,579
WARM WATER PRAWNS	£454.9M	POLLOCK	40,431
POLLOCK	£249.7M	WARM WATER PRAWNS	26,283

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Total seafood species performance to 2025 (Figure 9)

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2023 52wks to 21.6.23	2024 52wks to 21.6.24	2025 52wks to 21.6.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	2023 52wks to 21.6.23	2024 52wks to 21.6.24	2025 52wks to 21.6.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	Avg Price 2025 (£)	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)
FISH	4,408,487	4,582,927	4,744,801	3.5	33.9	396,878	406,697	410,225	0.9	3.4	£11.57	2.6	29.5
TOTAL SALMON	1,318,631	1,408,929	1,505,356	6.8	51.6	69,781	71,070	76,415	7.5	9.1	£19.70	-0.6	39.0
COD	510,068	506,748	508,440	0.3	21.7	50,825	47,749	47,579	-0.4	-15.1	£10.69	0.7	43.4
TUNA	441,600	462,840	479,599	3.6	29.9	65,384	67,138	69,999	4.3	6.3	£6.85	-0.6	22.1
WARM WATER PRAWNS	432,196	427,827	454,913	6.3	60.8	26,241	24,990	26,283	5.2	35.2	£17.31	1.1	18.9
POLLOCK	218,817	246,045	249,748	1.5	110.5	36,736	40,333	40,431	0.2	49.8	£6.18	1.3	40.5
HADDOCK	248,280	253,173	245,248	-3.1	11.9	22,235	22,371	21,199	-5.2	-8.7	£11.57	2.2	22.5
MIXED SEAFOOD	213,698	220,544	233,339	5.8	47.9	17,981	18,246	19,355	6.1	-1.4	£12.06	-0.3	50.1
COLD WATER PRAWNS	206,578	207,512	210,167	1.3	2.6	14,807	14,659	14,422	-1.6	-14.1	£14.57	2.9	19.5
MACKEREL	136,303	147,712	160,354	8.6	29.3	15,787	15,840	16,574	4.6	-4.4	£9.68	3.8	35.2
SEA BASS	90,458	93,561	99,853	6.7	79.8	5,333	5,616	5,817	3.6	60.6	£17.17	3.0	11.9
BASA	86,324	88,843	81,382	-8.4	49.8	10,157	10,095	8,908	-11.8	14.9	£9.14	3.8	30.4
OTHER	69,139	73,258	78,644	7.4	-25.6	14,598	22,480	20,412	-9.2	2.0	£3.85	18.2	-27.1
SCAMPI	67,265	67,233	69,217	3.0	24.4	5,654	5,495	5,337	-2.9	-4.9	£12.97	6.0	30.7
SARDINES	53,285	61,009	59,582	-2.3	62.7	10,279	10,890	10,128	-7.0	28.0	£5.88	5.0	27.1
CRABSTICK	41,323	38,564	35,989	-6.7	29.0	9,940	8,485	7,962	-6.2	21.9	£4.52	-0.6	5.8
TROUT	22,478	25,741	29,187	13.4	-16.6	1,205	1,378	1,428	3.6	-54.0	£20.44	9.5	81.6
MUSSELS	28,477	28,361	27,633	-2.6	15.5	4,783	4,721	4,446	-5.8	5.2	£6.22	3.5	9.8
ANCHOVY	18,731	21,370	24,455	14.4	89.6	948	930	1,038	11.7	28.0	£23.56	2.5	48.1
SCALLOPS	18,351	18,887	20,017	6.0	-3.1	715	772	786	1.8	-19.4	£25.45	4.1	20.2
CRAB	18,363	17,024	18,875	10.9	-35.9	586	534	570	6.7	-65.2	£33.10	3.9	84.5
SOLE	25,765	24,712	18,573	-24.8	-42.6	1,645	1,673	1,093	-34.7	-62.0	£16.99	15.0	51.3
SQUID (CALAMARI)	21,569	19,072	17,028	-10.7	42.0	1,589	1,384	1,212	-12.4	31.4	£14.05	2.0	8.1

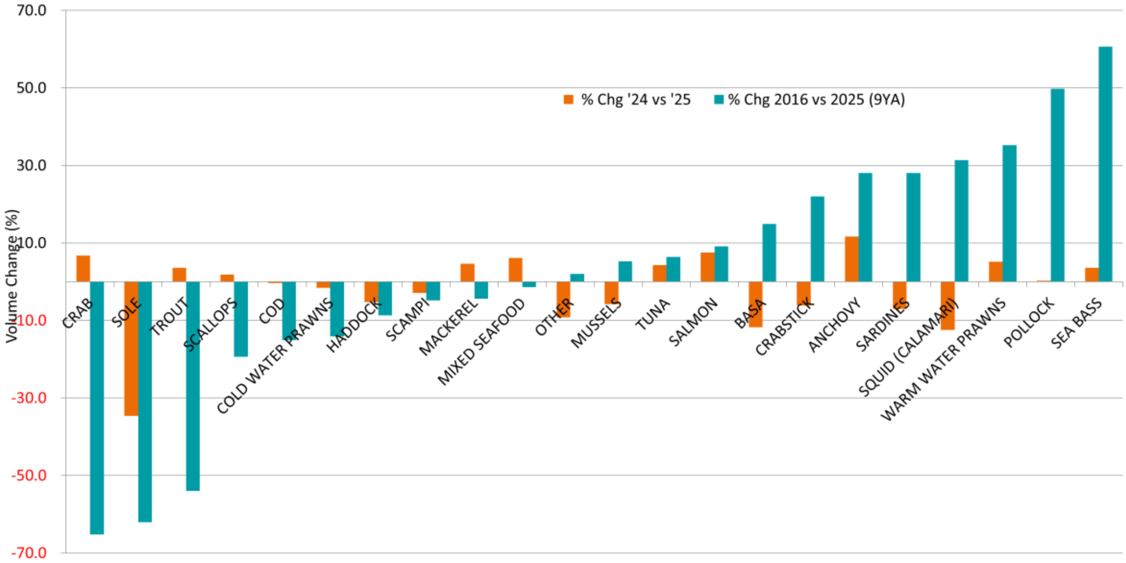
**Other- cheaper unidentified whitefish Nielsen Scantrack YE 14.6.25*

In the 52 weeks to June 2025, easing pressure on personal finances impacted nearly all species sales, with more expensive species such as salmon, warm water prawns and seabass back in growth. This year, volume sales of the cheaper species, which have performed strongly for a number of years, such as pollock, basa and 'Other' (cheaper products where the species is not named, such as 'fish pie' – mainly containing pollock) are either flat or in decline.

Anchovy and crab had the highest volume growth, but from a small base, whilst sole (-34%) and squid (-12.4%) showed the highest annual decline.

Over the long term (9 years), salmon, warm water prawns, pollock and seabass, out of the more popular species, saw a significant increase in volume sales. Whilst the more 'traditional' species such as crab sole and trout saw declines of over -50% (Figure 10).

Total seafood species volume performance to June 2025 (Figure 10)



Nielsen Scantrack YE 15.06.24

It is a measure of the easing of the cost-of-living crisis that the 'other' segment saw a significant decrease in volume sales compared to last year. 'Other', which captures the cheapest seafood products where species is not mentioned (often containing A. pollock), such as 'fish 'pie or 'fish' fingers, fell by -9.4%.

Farmed species such as salmon, seabass and warmwater prawns continue in long-term growth despite a high average price. In the 52 weeks to March 2025, farmed seafood held an estimated 60% (+0%) by value, and 41% (+0%) by volume share of the top 5. With an average price of £18.86/kg, 68% higher than the average price of the 'top 5 'wild caught species
(£11.24).

In 2024/5 shoppers appeared to prioritise quality over price once more, ensuring that freshness remains a key part of the value-for-money equation and a trigger to purchase for seafood.

The seafood shopper

In 2025, the number of shoppers purchasing seafood continued to fall. However, total seafood penetration (i.e., the % of shoppers who purchase seafood) remains very high, at 95.0%. Compared with the previous year, fewer shoppers are shopping more often and spending more on smaller baskets. Shoppers bought an average of 0.5kg of seafood per trip, spending on average £5.23 per trip; and bought seafood 28 times per year, spending a total of £146.59 on 13.10 kg/yr. (Figure 11)

Nielsen demographics still define the total seafood shopper as predominantly affluent AB/C1, older (age 45+), typically in two-person, and larger 3-4 person households without children present (Figure 12). Where children are present, they are typically aged 5-15 years.

2025 seafood Key Point Indicators (KPI's) (Figure 11)

		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 14.6.25

2025 seafood demographics % shoppers by volume (Figure 12)

	TOTAL FISH	AMBIENT	CHILLED	FROZEN
CLASS AB	32.4	29.7	36.7	28.5
CLASS C1	29.6	29.8	29.6	29.6
CLASS C2	16.4	18.0	14.9	17.3
CLASS D	13.4	13.6	11.9	15.2
CLASS E	8.2	8.9	6.9	9.4
SIZE 1 MEMBER	25.7	25.0	29.7	20.8
SIZE 2 MEMBERS	37.6	34.4	41.4	34.5
SIZE 3 MEMBERS	15.6	16.5	13.9	17.5
SIZE 4 MEMBERS	14.0	15.5	10.7	17.4
SIZE > 5 MEMBERS	7.1	8.6	4.3	9.9
<35 YEARS	12.0	14.7	9.8	13.2
35 TO 44 YEARS	16.2	17.9	13.1	19.1
45 TO 64 YEARS	16.6	18.2	15.0	17.7
55-64 yrs	19.1	19.8	18.7	19.1
65+ YEARS	36.2	29.5	43.5	30.9
CHILDREN YES	23.2	25.7	16.8	30.1
CHILDREN NO	76.8	74.3	83.2	69.9
CHILD 0 TO 4 YEARS	7.6	8.2	5.2	10.5
CHILD 5 TO 10 YEARS	12.6	13.6	8.5	17.6
CHILD 11 TO 15 YEARS	11.5	13.4	8.0	15.0
PRE FAMILY	6.6	8.4	6.3	5.8
NEW FAMILY	4.5	4.7	3.6	5.5
MATURING FAMILIES	12.1	13.1	8.1	16.8
ESTABLISHED FAMILIES	9.6	11.6	7.5	11.0
POST FAMILIES	14.8	15.8	14.8	14.1
OLDER COUPLES	34.3	29.9	37.9	32.4
OLDER SINGLES	18.2	16.6	21.8	14.5
Female	70.9	72.5	69.4	71.8
Male	29.1	27.5	30.6	28.2

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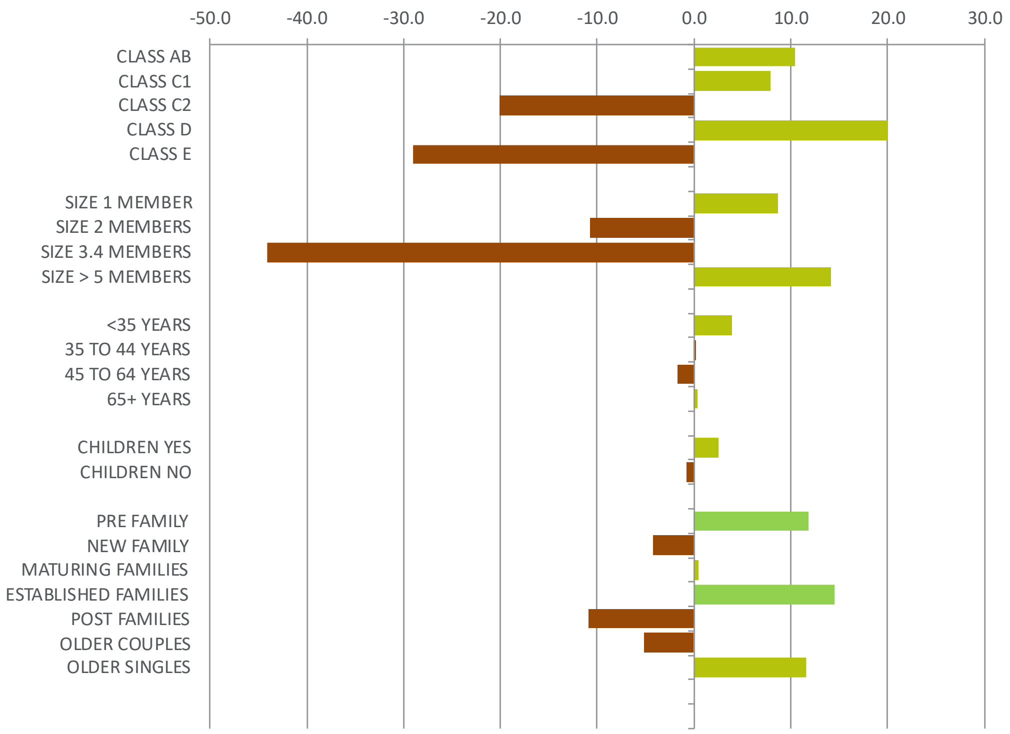
In 2025, seafood remains an older and more affluent purchase. Compared to 2016, there have been some significant shifts in total seafood demographics (Figure 13). The share of seafood consumed by the oldest demographics (over 65 yrs) has increased slightly again, along with a boost in consumption by the under-35s. The high average price of seafood continues to force the least affluent E-demographic to trade out of seafood; however, CLASS D continued to recover this year from recent declines, mirroring a large increase in the growth of affluent AB and C1 shoppers. Seafood purchases are also increasing in larger >5 households with a decline in 3 and 4-person households. Compared to 2016, there has also been an increase in families where children are present, established families and older singles.

Percentage change in total seafood demographic 2025 vs 2016 (Figure 13)



Nielsen Homescan YE 14.6.25

Executive Summary/Conclusion

The 52 weeks to June 2024 saw shoppers move away from cheaper and coated frozen seafood, ending the post-COVID-19 run of frozen seafood driving the majority of volume growth in the category. Chilled seafood returned to volume growth in the second half of 2024, and along with a contribution from ambient, has remained the main driver of volume sales. If sustained, this could be the start of seafood returning to the pre-COVID-19 'normal' where the only volume growth in the category came from chilled seafood sales. Overall, inflation on seafood sales remains low.

In June 2025, UK retail seafood sales continued in modest growth, UK seafood sales were worth £4.74bn (+3.5%), with a volume of 410,225 tonnes (+0.9%) and an average price of £11.57/kg (+2.6%). Seafood Inflation has increased slightly, at +2.6% compared to +2.2% in June last year but now sits lower than the CPI for food and alcoholic beverages (+4.4%) once again. Over the long term, seafood volume sales stand at +4.0% up on COVID-19 levels, and +3.4% higher than 2016 (the oldest UK data availability). This is taking into account an approximate 5% uplift caused by Nielsen introducing an enhanced discounter data collection methodology in 2024.

Compared to last year, most segments were in volume growth, apart from the coated segments, breaded, fingers and cakes. and sauce. Battered and sushi showed the highest volume growth with +7.0% and +8.4% respectively, as shoppers look for dine in alternatives to fish and chips in foodservice. Dusted and fingers showed the highest volume decline of -11.9% and -8.9% respectively.

This year salmon continues to grow share, through strong volume growth. Easing pressure on personal finances impacted on nearly all species sales, with more expensive species such as salmon, warm water prawns and seabass back in growth. This year volume sales of the cheaper species which have performed strongly for a number of years, such as pollock, basa and 'Other' (cheaper products where the species is not named such as 'fish pie' – mainly containing A pollock) are either flat or in decline. Anchovy and crab had the highest volume growth, but from a small base, whilst sole (-34%) and squid (-12.4%) showed the highest annual decline.

Over the long term (9 years), salmon, warm water prawns, pollock and seabass out of the more popular species, saw a significant increase in volume sales. Whilst the more 'traditional' species such as crab sole and trout saw declines of over -50% (Figure 10).

In 2025 seafood remains an older and more affluent purchase. Compared to 2016 there have been some significant shifts in total seafood demographics (Figure 13). The share of seafood consumed by the oldest demographics (over 65 yrs.) has increased again, along with a boost in consumption by the under 35's.

The seafood category may continue to grow through 2025/6, subject to positive pressures such as if the UK economy continues to improve , and if the cost-of-living crisis continues to ease. This may also be helped if shopper confidence is buoyed by feel good factors, such as good weather and England performing well in the women's EURO 2025 football. However, in mid-2025, inflation is starting to rise once more, and uncertainties around Trump's tariffs, tensions in Ukraine and the Middle East, will keep spending low.

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

Contact

You can also call us and we can try to put you in touch with the team you are looking to speak to:

0131 380 4505

For Retail enquiries contact:
Richard.Watson@seafish.co.uk

For Trade enquiries contact:
Joe.Cooper@seafish.co.uk

For Foodservice enquiries contact:
Suzi.Pegg-darlison@seafish.co.uk

seafish.org

Write to us
You can write to us at our Edinburgh or Grimsby offices.

Edinburgh office
18 Logie Mill
Logie Green Road
Edinburgh
EH7 4HS

Grimsby office
Origin Way
Europarc
Grimsby
N.E. Lincs
DN37 9TZ