

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



Frozen Seafood in Multiple Retail (2025)

Market insight analysis (20m read)

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December 2025



Frozen 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, frozen seafood trends at the sector, segment and species level, along with changing shopper trends, key point indicators (KPI's) and demographics in multiple retail stores to October/November 2025.

FROZEN SEAFOOD IN MULTIPLE RETAIL (2025 UPDATE)

Understanding the changing landscape of seafood retail sales and consumer preferences

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

Frozen seafood volumes turns to decline

Shoppers return to chilled seafood



Average Price

£ **£8.51/kg** (+4.0%)



Frozen Batter Vol up +18%

Vs 9 years ago.

Top 5 frozen species by volume

↓

'Other'
Pollock
Sole

↑

Prawns
Mixed
Tuna

UK frozen seafood sales worth

£1.1bn (-0.4%)



Younger more affluent purchase

Consumer Preferences

Cod retains the top spot by value, pollock by volume



Frozen warm water prawns, basa and mixed seafood performed strongly

SEAFISH

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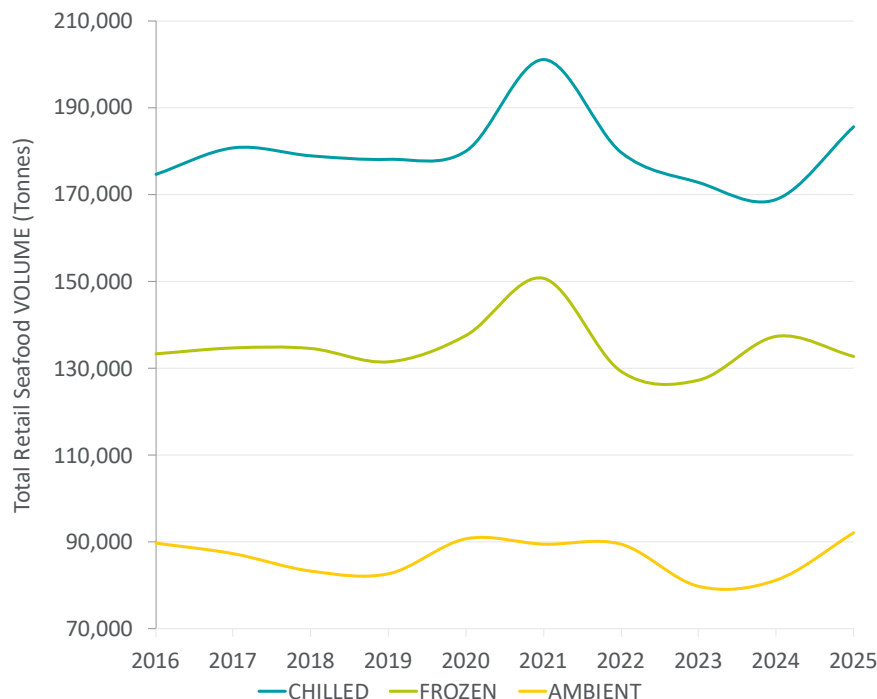
Historic retail seafood sector trends

The retail seafood market has historically been influenced by price fluctuations, with inflation leading to higher prices and a corresponding decline in consumption. While frozen seafood saw a steady decline in volume from 2008 until the COVID-19 pandemic, the post-pandemic period marked a significant turnaround, with frozen seafood emerging as the main growth sector (Figure 1)

The COVID-19 pandemic caused a surge in demand across all seafood categories, driven by panic buying, work-from-home arrangements, and school closures. Notably, frozen seafood, particularly coated and natural varieties, saw a dramatic 74% increase in weekly volume sales compared to the previous year. By mid-2021, as conditions began to stabilise, frozen seafood's growth slowed, and chilled seafood regained market prominence.

In 2022, global crises—such as inflation, the war in Ukraine, and rising financial pressures—led consumers to focus on affordability, shifting demand from premium frozen and chilled options to ambient products. By 2023, financial constraints continued to influence consumer behaviour, resulting in price-driven growth across all seafood sectors. However, by late 2023, the focus on value spurred a resurgence in frozen seafood sales, a trend that has continued up until this year.

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



Nielsen Scantrack

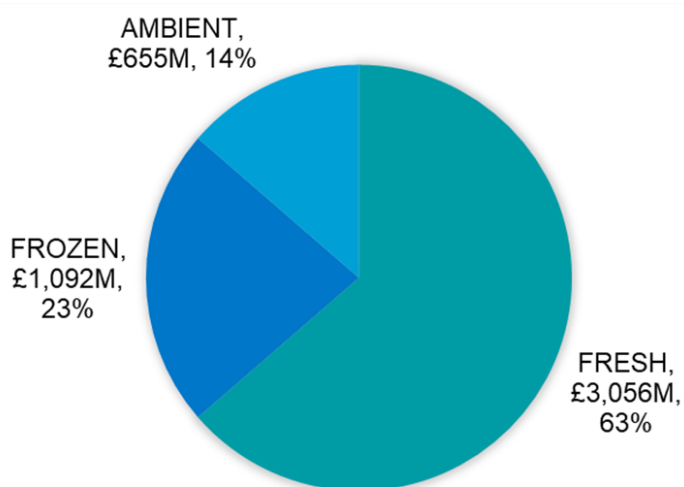
Frozen seafood performance

In the 52 weeks to 4th October 2025, frozen seafood was in price-driven growth, worth £1.09bn (-0.9%) with a volume of 129,419 tonnes (-4.2%); and an average price of £8.44/kg (+3.4%).

Frozen seafood accounted for 23% of the total value of seafood sales (Figure 2). However, its value share decreased by -1 percentage points, and its volume share dropped by -1.5 percentage points, as it lost ground to both chilled and ambient seafood products, potentially signalling an end to the strong post COVID-19 run of frozen seafood growth.

Looking at long-term trends over the past nine years, frozen seafood has shown substantial price-driven growth, with value up +28.6%, whilst volume fell by -3.8%. The average price per kilogram of frozen seafood rose by 33.7%, which was higher than the price inflation for chilled and ambient seafood, which ranged from 23% to 29%.

UK seafood sector share by value 2025 (Figure 2)



Nielsen Scantrack YE 04.10.25

Frozen seafood KPIs

Over the 52-week period leading up to October 2025, the number of shoppers purchasing frozen seafood decreased (Figure 3). Although penetration remained higher than that of chilled or ambient seafood, it fell from once more to 81%. Compared to the previous year, fewer shoppers bought frozen seafood, and those who did, purchased smaller amounts, less frequently at higher prices. On average, frozen seafood shoppers bought 0.5 kg per trip, spending £5.67 each time. They bought frozen seafood 9 times per year, spending a total of £45.53, which equates to approximately 5.0 kg.

Frozen 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

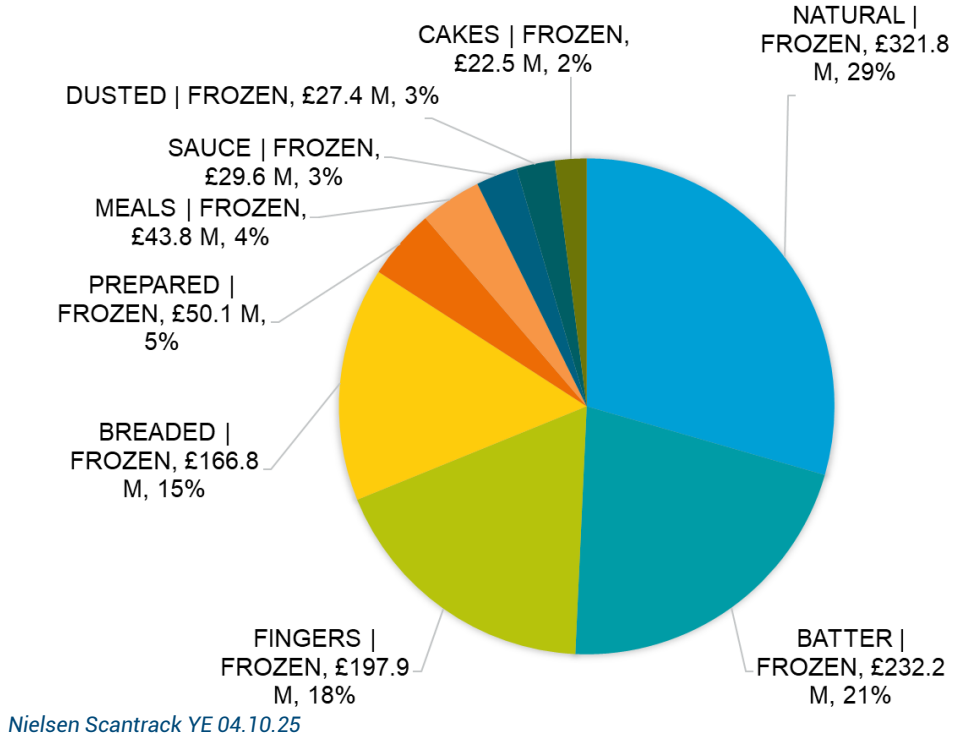
Frozen seafood segment performance

The frozen natural seafood segment (without added ingredients) maintained its largest share of frozen seafood worth £322 million (-0.7%), with a volume of 28,520 tonnes (+3.2%) and an average price of £11.28 per kilogram (figure 4/5/6). Once the highest-priced frozen seafood category, frozen natural is now priced lower than frozen prepared and dusted. This year, frozen battered seafood which recently overtook frozen fingers to become the second-largest segment by value, continue to widen the gap. In terms of volume, frozen fingers continue to hold the largest market share, falling by 2 percentage points to reach 30% of total frozen seafood volume, losing volume share to frozen natural and battered seafood.

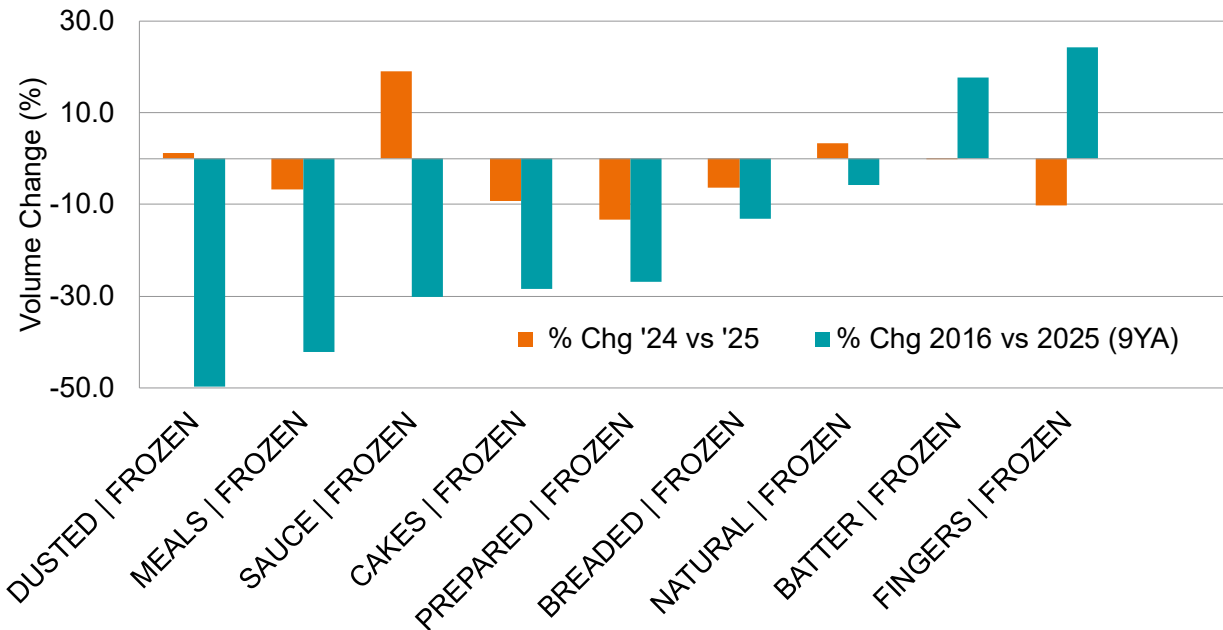
Only frozen dusted experienced full growth, with frozen sauce showing the highest volume growth of +19% from a small base. Frozen prepared and fingers showed the highest volume decline of over -10%

Over the 9 years to 4th October 2025, only frozen batter and fingers were in full growth, with breaded, prepared and meals in price-driven growth. Frozen fingers showed the highest long-term volume growth (+24%) whilst frozen dusted, and meals showed the highest declines of up to -50%

Segment value (£m) share of UK frozen seafood 2025 (Figure 4)



Long & short-term UK frozen segment volume trends to 2025 (Figure 5)



(Data: Nielsen Scantrack – YA vs 9yr - 52wks to 4.10.25)

UK frozen 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 FROZEN	330,573	323,976	321,767	-0.7	18.2	28,939	28,583	28,520	3.2	-5.8	£11.28	-0.5	25.5
BATTER FROZEN	213,621	220,327	232,219	5.4	88.6	22,348	23,465	24,223	-0.2	17.6	£9.59	2.1	60.3
FINGERS FROZEN	214,760	208,654	197,867	-5.2	44.8	40,552	43,560	39,143	-10.1	24.2	£5.06	5.5	16.5
BREADED FROZEN	173,652	170,080	166,770	-1.9	28.2	17,820	17,431	16,332	-6.3	-13.1	£10.21	4.7	47.6
PREPARED FROZEN	57,292	52,032	50,145	-3.6	22.7	5,364	4,837	4,191	-13.4	-26.9	£11.97	11.2	67.8
MEALS FROZEN	48,719	45,709	43,760	-4.3	-0.1	8,307	7,552	7,037	-6.8	-42.1	£6.22	2.8	72.3
SAUCE FROZEN	32,365	30,663	29,582	-3.5	-35.1	3,290	3,421	4,068	18.9	-30.1	£7.27	-18.9	-7.0
DUSTED FROZEN	32,107	27,079	27,370	1.1	-24.9	2,744	2,248	2,276	1.2	-49.8	£12.02	-0.2	49.6
CAKES FROZEN	23,532	23,569	22,503	-4.5	14.4	4,083	4,004	3,630	-9.4	-28.4	£6.20	5.3	59.8

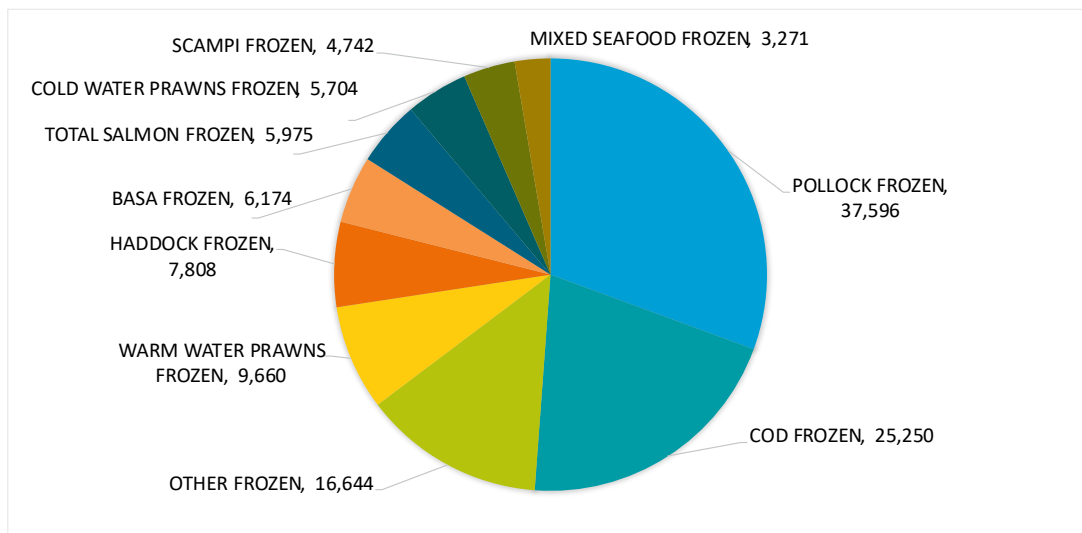
UK Nielsen Scantrack 52wks to 04.10.25 (1yr/9yr)

Frozen seafood species performance

In 2025, cod remains the top-selling frozen seafood species by value, but it remains in volume and value decline. Meanwhile, pollock continues to be the best-seller by volume, but recent long-term growth has stalled as consumers turn to more premium frozen seafood species (figure 7/8/9). Along with Pollock, cheaper frozen seafood, such as 'other' seafood (often Alaska pollock/basa, which is not named on the packaging), saw significant volume and value declines. Species showing positive volume growth included warm water prawns, mixed seafood and tuna.

Over the 9 years to October 2025, frozen pollock, warm water prawns and 'other' seafood showed the strongest volume growth out of the top-selling frozen species, and squid and sea bass saw the highest volume growth of up to +163%. However, species such as cod, haddock, salmon and cold-water prawns were in decline over the same period. In terms of pricing, 'other' seafood and sea bass saw the largest average price reductions compared to eight years ago, while cod, mixed seafood and plaice experienced the highest price increases of up to +76%

Top 10 frozen species volume tonnes UK 2025 (Figure 7)



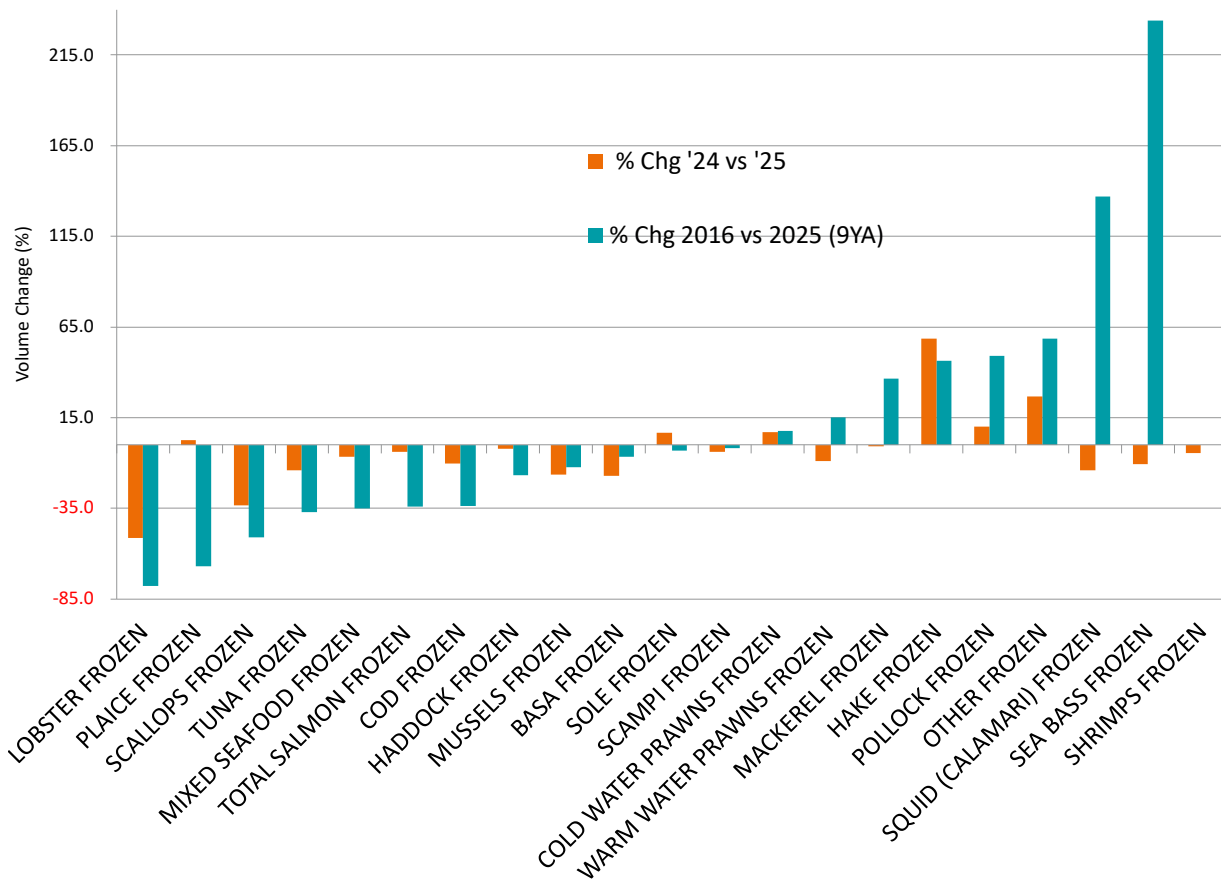
Nielsen Scantrack YE 04.10.25

Frozen seafood species volume performance 2025 (Figure 8)

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2023 52wks to 29.11.25	2024 52wks to 29.11.25	2025 52wks to 29.11.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	2023 52wks to 29.11.25	2024 52wks to 29.11.25	2025 52wks to 29.11.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	Avg Price 2025 (£)	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)
FISH	4,502,452	4,642,840	4,835,344	4.1	36.4	399,655	410,257	411,568	0.3	3.5	£11.75	3.8	31.8
FROZEN	1,127,187	1,100,170	1,095,786	-0.4	29.0	134,553	134,430	128,770	-4.2	-4.3	£8.51	4.0	34.8
COD FROZEN	270,800	249,043	240,178	-3.6	3.5	29,170	27,033	25,250	-6.6	-38.1	£9.51	3.2	67.4
POLLOCK FROZEN	210,152	229,732	232,290	1.1	110.4	34,498	37,921	37,596	-0.9	47.4	£6.18	2.0	42.7
WARM WATER PRAWNS FROZEN	140,106	139,021	141,453	1.8	61.4	9,767	9,325	9,660	3.6	30.3	£14.64	-1.8	23.9
HADDOCK FROZEN	84,146	78,079	80,738	3.4	23.7	8,243	7,988	7,808	-2.3	-19.4	£10.34	5.8	53.4
COLD WATER PRAWNS FROZEN	75,164	72,602	73,768	1.6	9.2	5,730	5,916	5,704	-3.6	-10.7	£12.93	5.4	22.3
TOTAL SALMON FROZEN	65,869	64,815	63,863	-1.5	-4.4	6,516	6,245	5,975	-4.3	-37.4	£10.69	3.0	52.7
SCAMPI FROZEN	62,972	63,382	62,098	-2.0	22.6	5,345	5,234	4,742	-9.4	-9.9	£13.09	8.1	36.0
BASA FROZEN	60,632	51,655	54,134	4.8	29.3	7,491	6,051	6,174	2.0	-6.8	£8.77	2.7	38.8
OTHER FROZEN	45,226	48,548	43,222	-11.0	6.7	17,803	19,513	16,644	-14.7	32.9	£2.60	4.4	-19.8
MIXED SEAFOOD FROZEN	26,141	26,751	34,195	27.8	44.6	2,553	2,645	3,271	23.7	-14.0	£10.45	3.4	68.0
SOLE FROZEN	12,238	11,957	9,796	-18.1	-0.7	1,004	996	711	-28.6	-33.6	£13.77	14.7	49.5
SQUID (CALAMARI) FROZEN	13,725	10,600	9,723	-8.3	183.5	1,184	984	838	-14.8	96.1	£11.61	7.7	44.6
TUNA FROZEN	8,908	8,724	8,661	-0.7	N/A	815	723	887	22.8	N/A	£9.76	-19.1	52.5
SHRIMPS FROZEN	10,265	8,944	7,386	-17.4	N/A	665	623	506	-18.9	N/A	£14.61	1.8	60.5
SEA BASS FROZEN	8,592	7,526	5,634	-25.2	83.0	983	873	689	-21.0	163.1	£8.17	-5.2	-30.5
LOBSTER FROZEN	5,918	3,935	4,749	20.7	-48.6	214	116	174	49.8	-65.8	£27.22	-19.4	50.3
SCALLOPS FROZEN	5,872	5,185	4,368	-15.8	-37.8	226	185	155	-16.0	-54.8	£28.19	0.3	37.6
PLAICE FROZEN	3,322	3,694	3,190	-13.7	-56.3	305	319	242	-24.3	-75.1	£13.20	14.1	75.8
MACKEREL FROZEN	2,508	2,523	2,499	-1.0	46.6	272	264	235	-11.2	18.1	£10.64	11.5	24.2
MUSSELS FROZEN	2,657	2,381	2,424	1.8	18.5	337	282	274	-2.8	-15.4	£8.83	4.8	40.0

Nielsen Scantrack – 1yr/9yr UK to 29.11.25

UK Frozen seafood species performance to 2025 (Figure 9)



Nielsen Scantrack – 1yr/9yr UK to 29.11.25

Frozen seafood shopper demographics

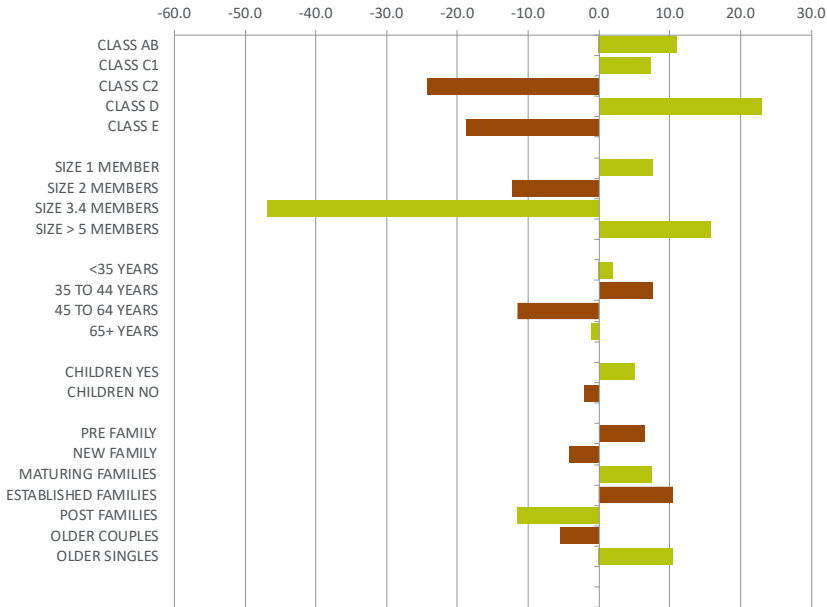
In 2025, Nielsen demographics show that the typical frozen seafood shopper is younger and less affluent compared to the broader seafood shopper. This group has a higher proportion of shoppers from the C2/D/E social grades, which include skilled manual workers, unskilled manual workers, and unemployed individuals. Frozen seafood shoppers tend to belong to larger households and are more likely to have children.

2025 seafood demographics % shoppers by volume (Figure 10)

	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 29.11.25

Change (%) in chilled seafood demographics (volume) 2025 vs 2016 (Figure 11)



Nielsen Homescan YE 29.11.25

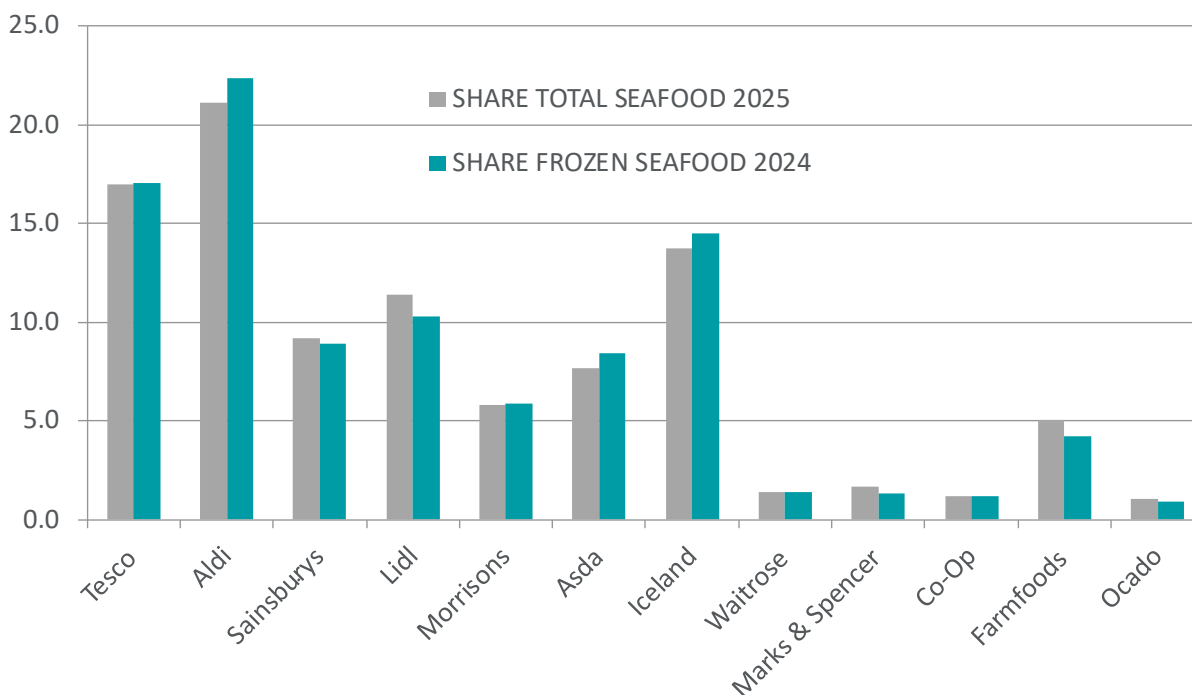
Frozen Seafood Shopper Trends

Compared to 2016, frozen seafood has attracted a significantly more affluent customer base in 2025. This shift is largely driven by buyers from larger households (greater than 5 people) who are trading down from chilled seafood due to price. Additionally, frozen seafood has become more popular among younger shoppers. In households with children, there is a noticeable shift towards families with older children.

Retailer Frozen Seafood Trends

In 2024, Aldi and Lidl were the only retailers to increase their share of frozen seafood compared to 2022. Aldi has seen particularly strong growth, recently overtaking Tesco to become the largest frozen seafood retailer in the UK (figure 12). Aldi’s long-term performance has been impressive, with its share of total seafood growing from just 1.5% in 2008 to 26% in 2024 (data includes a recent Nielsen adjustment to better capture discounter product sales). This growth is driven by Aldi’s strong positioning on price, quality, and its emphasis on British-sourced products—messages that resonate well with shoppers, especially in the wake of the Ukraine crisis and the ongoing cost-of-living pressures. While prices remain a significant factor, quality remains a crucial factor for seafood shoppers.

Grocer volume share of frozen seafood 2025 vs 2024 (Figure 12)



Nielsen Homescan (GB) YE 29.11.25

Executive Summary/Conclusion

This year potentially signalled an end to the strong post-COVID-19 run of frozen seafood growth, as the frozen category returned to full decline, losing share to chilled seafood as shoppers traded up to predominantly chilled seafood and more premium species.

Over the 52-week period leading up to October 2025, fewer shoppers bought frozen seafood, and those who did, purchased smaller amounts, less frequently at higher prices. On average, frozen seafood shoppers bought 0.5 kg per trip, spending £5.67 each time. They bought frozen 9 times per year, spending a total of £45.53, which equates to approximately 5.0 kg of frozen seafood per year.

The frozen natural seafood segment (without added ingredients) maintained its largest share of frozen seafood worth £322 million (-0.7%), with a volume of 28,520 tonnes (+3.2%) and an average price of £11.28 per kilogram (figure 4/5/6). Once the highest-priced frozen seafood category, frozen natural is now priced lower than frozen prepared and dusted. This year, frozen battered seafood, which recently overtook frozen fingers to become the second-largest segment by value, continues to widen the gap. Only frozen dusted experienced full growth, with frozen sauce showing the highest volume growth of +19% from a small base. Frozen prepared

and fingers showed the highest volume decline of over -10%. Compared to 9 years ago only frozen batter and fingers were in full growth.

In 2025, cod remains the top-selling frozen seafood species by value, but it remains in volume and value decline. Interest in cheaper frozen seafood has stalled as consumers turn to more premium frozen seafood species such as warm water prawns, mixed seafood and tuna. Over the past 9 years, frozen pollock, warm water prawns and 'other' seafood showed the strongest volume growth out of the top-selling frozen species, whilst squid and sea bass saw the highest volume growth of up to +163%. However, species such as cod, haddock, salmon, and cold-water prawns declined over the same period.

Compared to 2016, frozen seafood has attracted a significantly more affluent customer base in 2025. This shift is largely driven by buyers from larger households (greater than 5 people) who are trading down from chilled seafood due to price. Additionally, frozen seafood has become more popular among younger shoppers. In households with children, there is a noticeable shift towards families with older children.

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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