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

Sushi in Multiple Retail 2025

Market insight analysis (20m read)

R. Watson.

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What is sushi?

Sushi is a popular Japanese dish that primarily consists of vinegared rice, combined with various ingredients such as raw or cooked seafood and vegetables.

The rice is a key component that differentiates sushi from other similar dishes such as sashimi which is thinly sliced raw fish or meat served without rice and kamaboko which is a cooked processed seafood often shaped to look like a crab or peeled prawn meat.

Common types of sushi include:

Nigiri: Hand-pressed rice balls topped with slices of raw or cooked fish, seafood, or other ingredients.

Maki: Rolled sushi, typically made by wrapping fish, vegetables, and rice in seaweed (nori) and slicing it into bite-sized pieces. Variations include hosomaki (thin rolls) and futomaki (thick rolls)

Temaki: Hand-rolled sushi in the shape of a cone, filled with rice, fish, and vegetables.
Sashimi:

Sushi performance

Seafood sushi products continue to perform strongly over both the long and short term, trending with younger consumers, resonating with the interest in Japanese culture, and eastern food trends. Being visually attractive (instagrammable), aspirational and healthy, as well as convenient for both office lunches and a 'dining in' treat to save money has helped sushi grow.

In the 52 wks. to March 2025, retail seafood sushi sales were worth £192.2m (+8.7%), with a volume of 11,029 tonnes (+7.4%) and an average price of £17.42/kg (+1.2%). Currently sushi is only sold in a chilled format and is ranked as the 8th most popular seafood segment by value and 9th by volume, having the highest average price out of all ten seafood segments. Over the long term (9 years) sushi has seen the highest value and volume growth of all ten segments, up +166% and +119% respectively.

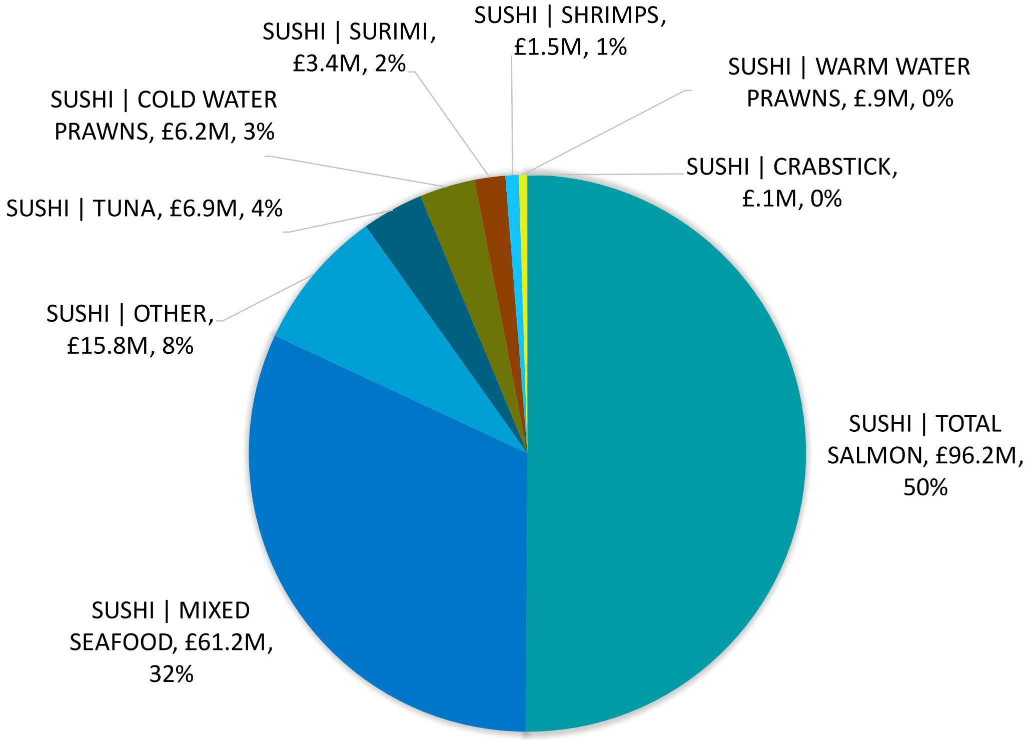
UK Sushi sector and segment performance to 2025

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2022 52wks to 22.3.23	2024 52wks to 22.3.24	2025 52wks to 22.3.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	2022 52wks to 22.3.23	2024 52wks to 22.3.24	2025 52wks to 22.3.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	Avg Price 2025 (£)	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)
TOTAL SEAFOOD	4,331,633	4,554,653	4,693,047	3.0	32.5	397,529	403,244	410,492	1.8	3.5	£11.43	1.2	28.0
FRESH	2,658,283	2,808,397	2,957,408	5.3	35.9	181,036	178,395	185,593	4.0	7.5	£15.94	1.2	26.5
FROZEN	1,087,558	1,117,965	1,093,052	-2.2	28.9	129,135	135,562	132,694	-2.1	-1.1	£8.24	-0.1	30.3
AMBIENT	585,792	628,291	642,587	2.3	24.0	87,358	89,286	92,204	3.3	2.7	£6.97	-1.0	20.8
NATURAL	1,855,141	1,967,395	2,046,763	4.0	31.4	112,465	111,537	115,935	2.8	3.5	£17.65	0.1	26.9
PREPARED	950,995	983,186	1,019,876	3.7	20.9	110,395	109,915	112,968	3.9	-1.0	£9.03	0.9	22.2
BATTER	254,599	281,357	305,015	8.4	127.9	26,802	27,304	29,993	9.9	40.3	£10.17	-1.3	62.4
BREADED	271,934	283,143	272,161	-3.9	29.2	28,323	27,513	26,790	-2.6	-5.1	£10.16	-1.3	36.2
MEALS	228,010	228,709	237,546	3.9	27.2	29,667	27,285	27,422	0.5	-15.7	£8.66	3.3	50.7
SAUCE	196,248	207,014	214,165	3.5	-0.6	22,115	21,754	22,177	1.9	-15.1	£9.66	1.5	17.2
FINGERS	213,401	224,479	212,893	-5.2	52.5	34,693	45,177	42,551	-5.8	34.1	£5.00	0.7	13.7
SUSHI	168,347	176,723	192,171	8.7	165.5	10,094	10,267	11,029	7.4	118.5	£17.42	1.2	21.5
CAKES	133,344	142,864	139,411	-2.4	20.9	17,907	17,828	17,683	-0.8	-3.1	£7.88	-1.6	24.7
DUSTED	59,614	59,783	53,046	-11.3	-21.7	5,070	4,664	3,943	-15.4	-46.1	£13.45	4.9	45.3

Nielsen Scantrack YE 22.3.25 (%Chg 9yr UK)

Salmon sushi is the most popular in UK retail, taking half (50%, up +2pp), of all sushi sales in 2025, followed by mixed seafood sushi (32%, -3pp), and 'other' where the seafood species is not named (8%, +0pp). Sushi made with cheaper species such as crabstick +183% and other (cheaper white fish) +73% showed the highest growth compared to last year, whilst mixed seafood, coldwater prawn and surimi sushi declined. Over the long term, many sushi seafood species achieved triple digit growth, the exception being crab and 'other' sushi where sales declined.

UK species share of sushi by Value 2025



Nielsen Scantrack YE 22.03.25

The sushi shopper

In 2025, sushi key point indicators (KPIs) showed stability. Compared to the previous year, there was an increase in the number of shoppers purchasing sushi, with higher frequency and expenditure on larger quantities. Shoppers bought an average of 0.3 kg of sushi per trip, spending approximately £4.28 per trip, and purchased sushi 6 times annually, resulting in a total expenditure of £24.30 on 1.5 kg per year.

Sushi seafood Key Point Indicators (KPI's) 2025

		Pen %	Freq	Avg Spend (£) 52w	AWOP (Kg) 52w	Trip Spend (£)	Avg Trip Kg	Price per Kg
TOTAL SEAFOOD	22 MAR 2024	95.2	27.5	£141.34	13.1	£5.15	0.5	£10.79
	22 MAR 2025	95.2	27.9	£144.39	13.0	£5.18	0.5	£11.07
	% Change	0.0	1.6	£2.16	-0.4	£0.59	-1.9	£2.57
CHILLED SEAFOOD	22 MAR 2024	80.7	18.4	£101.77	6.7	£5.52	0.4	£15.23
	22 MAR 2025	81.1	18.9	£105.87	6.8	£5.60	0.4	£15.53
	% Change	0.5	2.5	£4.03	2.1	£1.45	-0.5	£1.92
FROZEN SEAFOOD	22 MAR 2024	82.4	9.3	£41.22	5.2	£4.44	0.6	£7.86
	22 MAR 2025	81.8	9.1	£40.27	5.0	£4.43	0.6	£8.05
	% Change	-0.7	-2.2	-£2.31	-4.6	-£0.16	-2.5	£2.36
AMBIENT SEAFOOD	22 MAR 2024	75.0	9.1	£24.70	3.7	£2.71	0.4	£6.70
	22 MAR 2025	74.9	9.2	£24.95	3.7	£2.70	0.4	£6.67
	% Change	-0.2	1.4	£1.00	1.4	-£0.37	0.1	-£0.42
CHILLED SUSHI	22 MAR 2024	14.6	5.6	£23.68	1.5	£4.20	0.3	£15.72
	22 MAR 2025	15.0	5.7	£24.30	1.5	£4.28	0.3	£15.80
	% Change	3.0	0.7	£2.62	2.1	£1.91	1.4	£0.51

Nielsen Homescan YE 22.03.25

Nielsen demographics define the chilled sushi shopper as significantly younger and slightly more affluent (higher percentage of AB/C1 shoppers) than the general seafood shopper, with a high proportion of shoppers in the under 35 and 35-44 age groups, typically in one and two person households, with a high proportion of children present compared to total seafood. Where children are present, they are typically aged 5-15 yrs.

Sushi demographics % shoppers (by volume) 2025

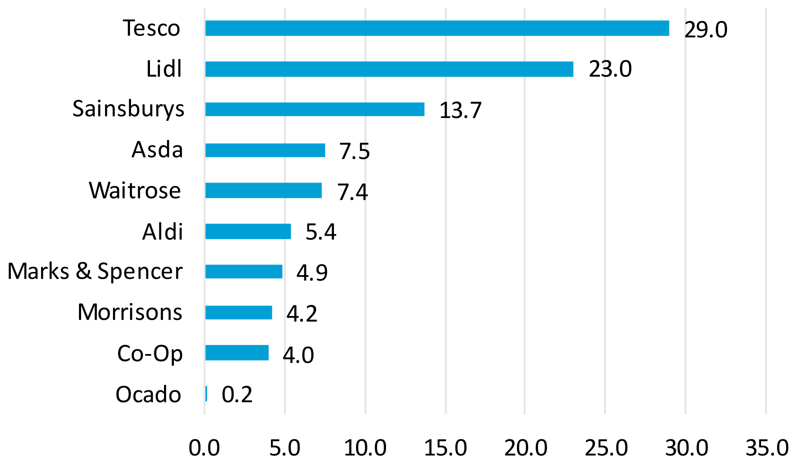
	TOTAL FISH	AMBIENT	CHILLED	FROZEN	SUSHI
CLASS AB	32.4	29.7	36.7	28.5	31.4
CLASS C1	29.6	29.8	29.6	29.6	32.0
CLASS C2	16.4	18.0	14.9	17.3	11.5
CLASS D	13.4	13.6	11.9	15.2	12.3
CLASS E	8.2	8.9	6.9	9.4	12.7
SIZE 1 MEMBER	25.7	25.0	29.7	20.8	32.3
SIZE 2 MEMBERS	37.6	34.4	41.4	34.5	26.1
SIZE 3 MEMBERS	15.6	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 64 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
CHILD 0 TO 4 YEARS	7.6	8.2	5.2	10.5	7.0
CHILD 5 TO 10 YEARS	12.6	13.6	8.5	17.6	16.8
CHILD 11 TO 15 YEARS	11.5	13.4	8.0	15.0	15.4
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 22.03.25

Where do shoppers buy sushi?

In 2025, Tesco sold the most sushi, taking 29% of UK sushi sales by volume, followed by Lidl and Sainsbury's. Surprisingly, stores which attract affluent shoppers such as Waitrose and Marks and Spencer’s, undertrade on sushi, perhaps due to their older age demographic.

Sushi share of trade (by volume) 2025



Nielsen Homescan YE 22.02.25

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

Nielsen:

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

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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