



UK Seafood Market

Richard Watson - Seafish Market Insight

North East Scotland Fisheries Development Partnership

February 18th 2022

Agenda

- Seafish market insight
- UK market briefing

Seafish Market Insight Service

- Retail
- Foodservice
- Trade (Import/Export)
- Shopper Insight

“Providing key information and actionable insight to help seafood businesses make sound commercial decisions”



Access to Reports:

- Seafish Website

<https://www.seafish.org/insight-and-research/>

- Secure Area

- [Click here to subscribe.](#)

Market Insight

We provide data, trends, and insight relating to the UK seafood market. This content is for seafood businesses only and requires registration.

[Market Insight Portal Login](#)[Register for market insight](#)

Our market analysts collate and report on a wide range of data, trends, and insight relating to the UK seafood market, ranging from landings and trade through to retail and foodservice. This enables stakeholders to make informed decisions and devise strategies and approaches based on robust information.

Retail & Shopper

Supplier: NielsenIQ/ Kantar/ IGD

- Sector/ segment/ species
- Demographics
- Grocery trends
- Shopper trends



Foodservice

Supplier: NPD Crest/Technomic

- Seafood Servings
- Channel performance
- Day parts
- Trending flavours and formats



Trade

Supplier: HMRC/ BTS /FAO / MMO

- Monthly reports
- Annual trade factsheets
- Globefish Insight Reports



Challenge 1: Falling Seafood Consumption

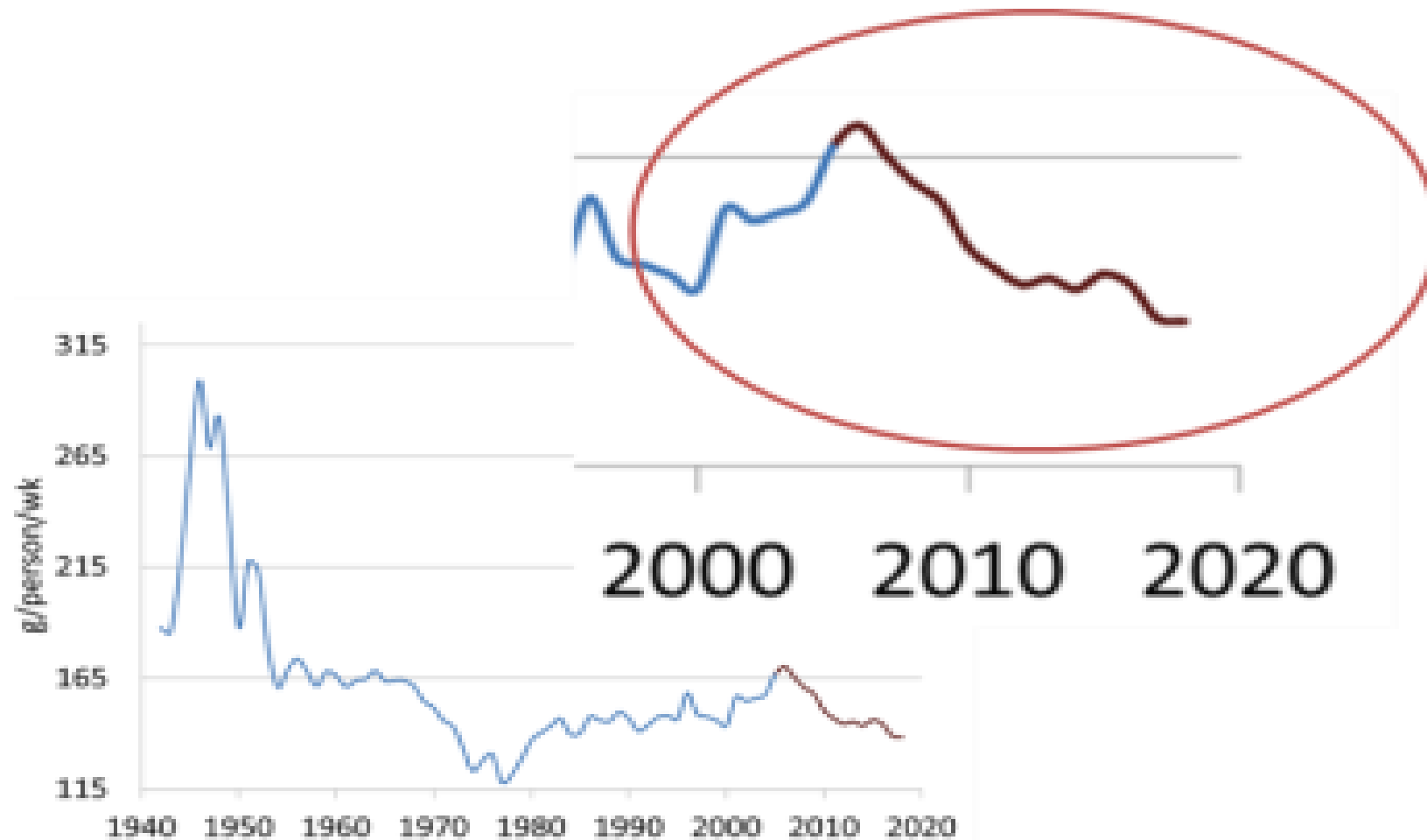


- Multiple Retail
- Foodservice
- Fishmongers



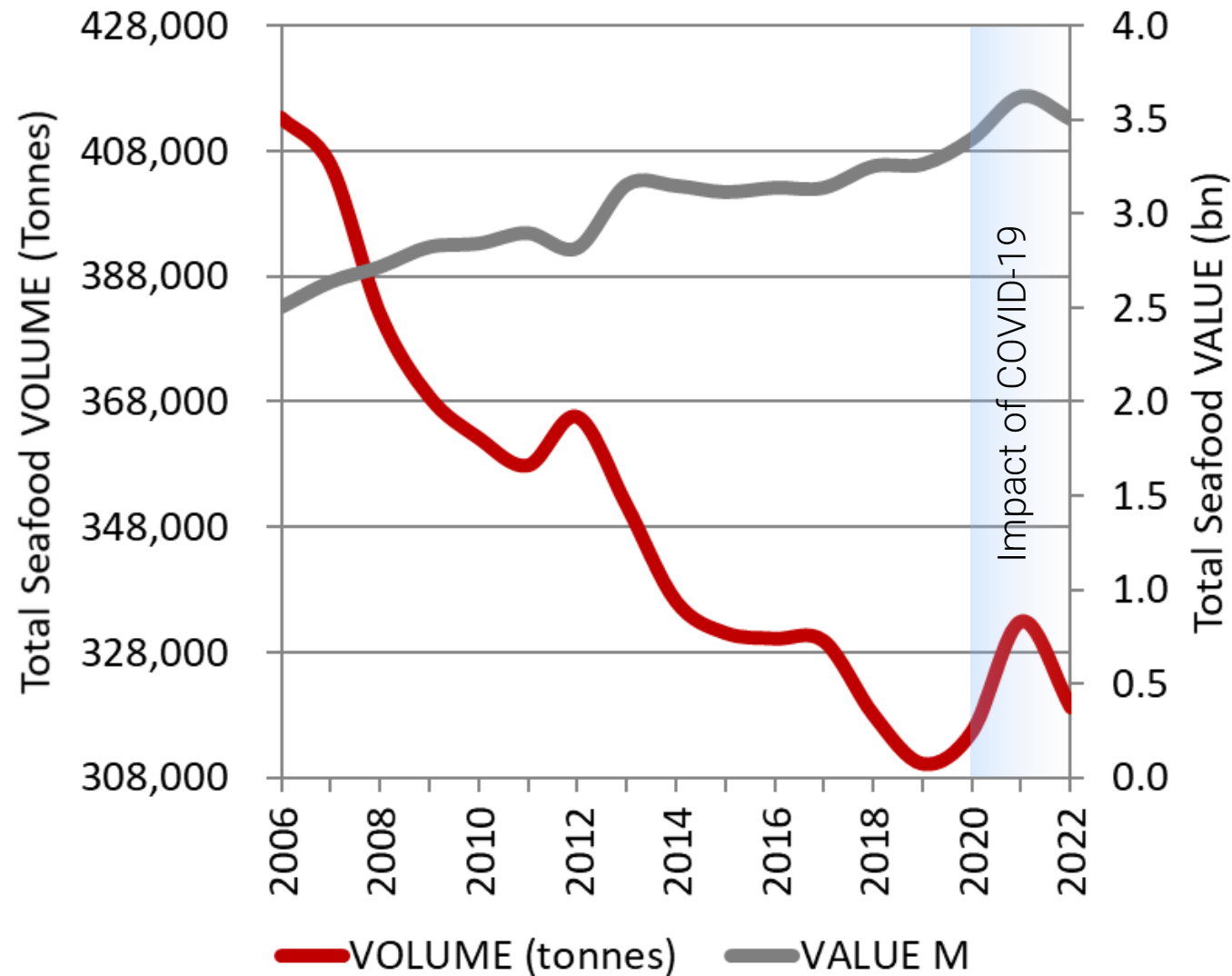
(NielsenIQ, NPD Crest, Kantar)

Household Seafood Consumption in Decline

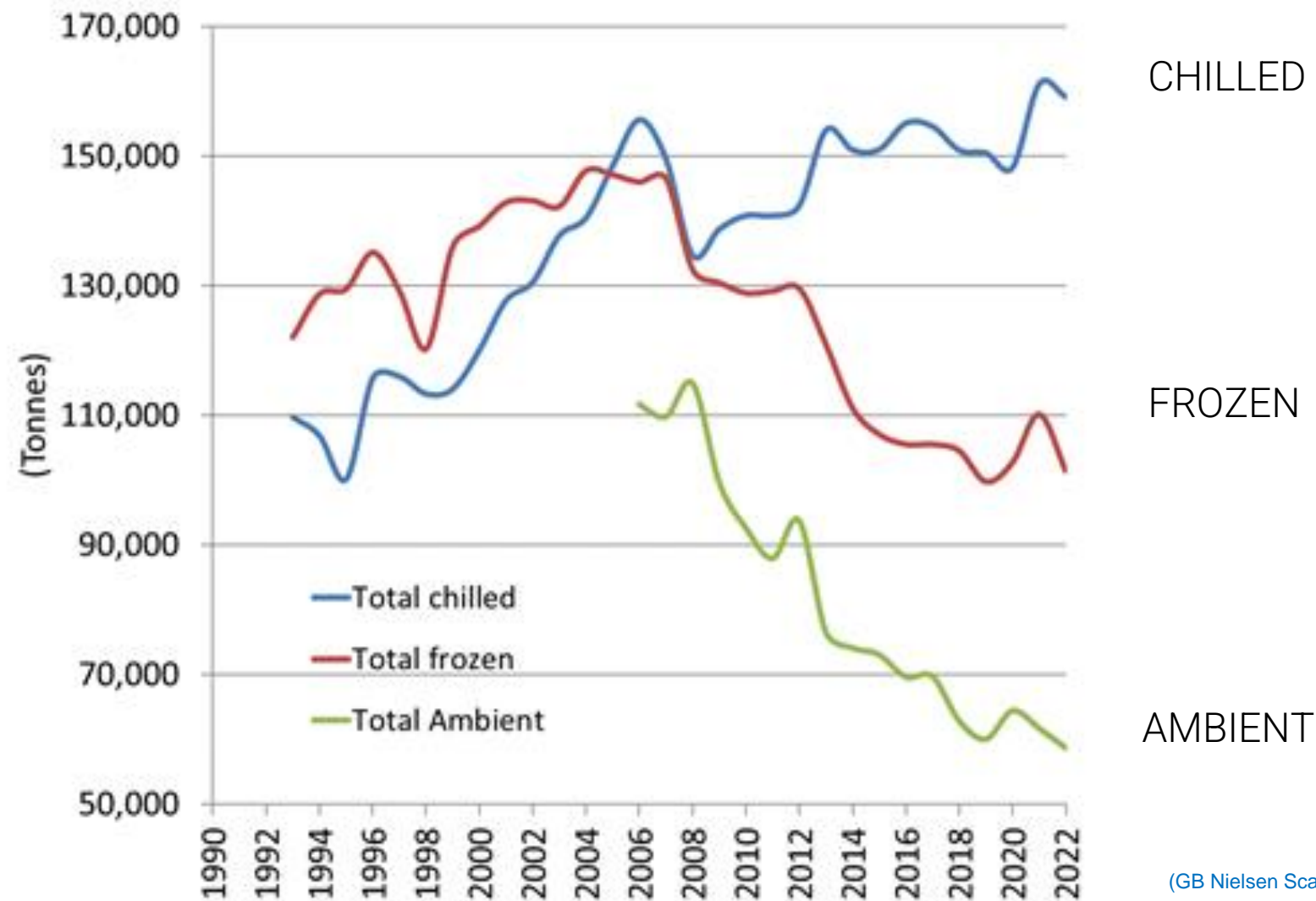


(Defra Family Food)

Long Term RETAIL GB Seafood Trends



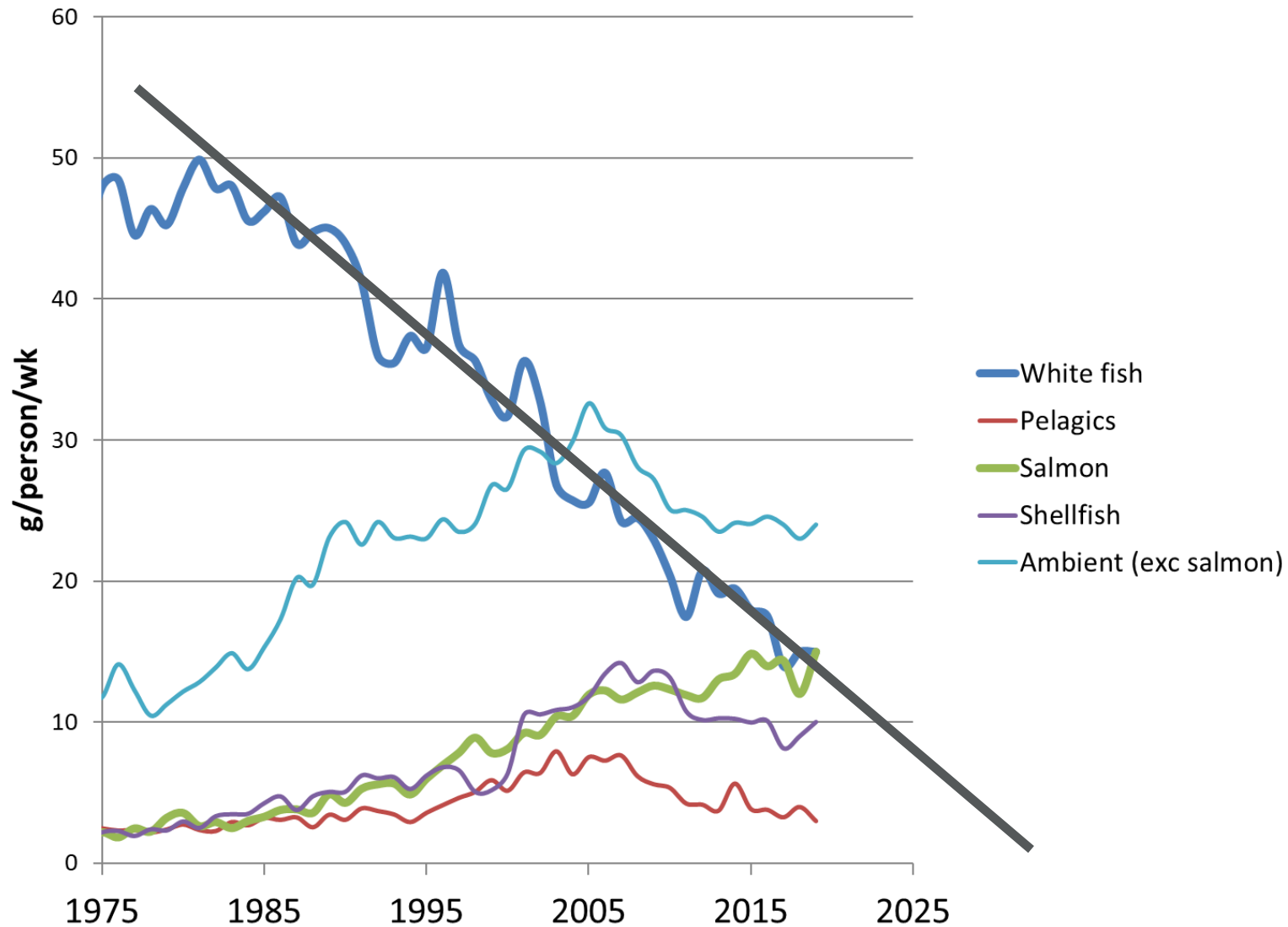
Chilled Consumption Grows Despite High Average Price



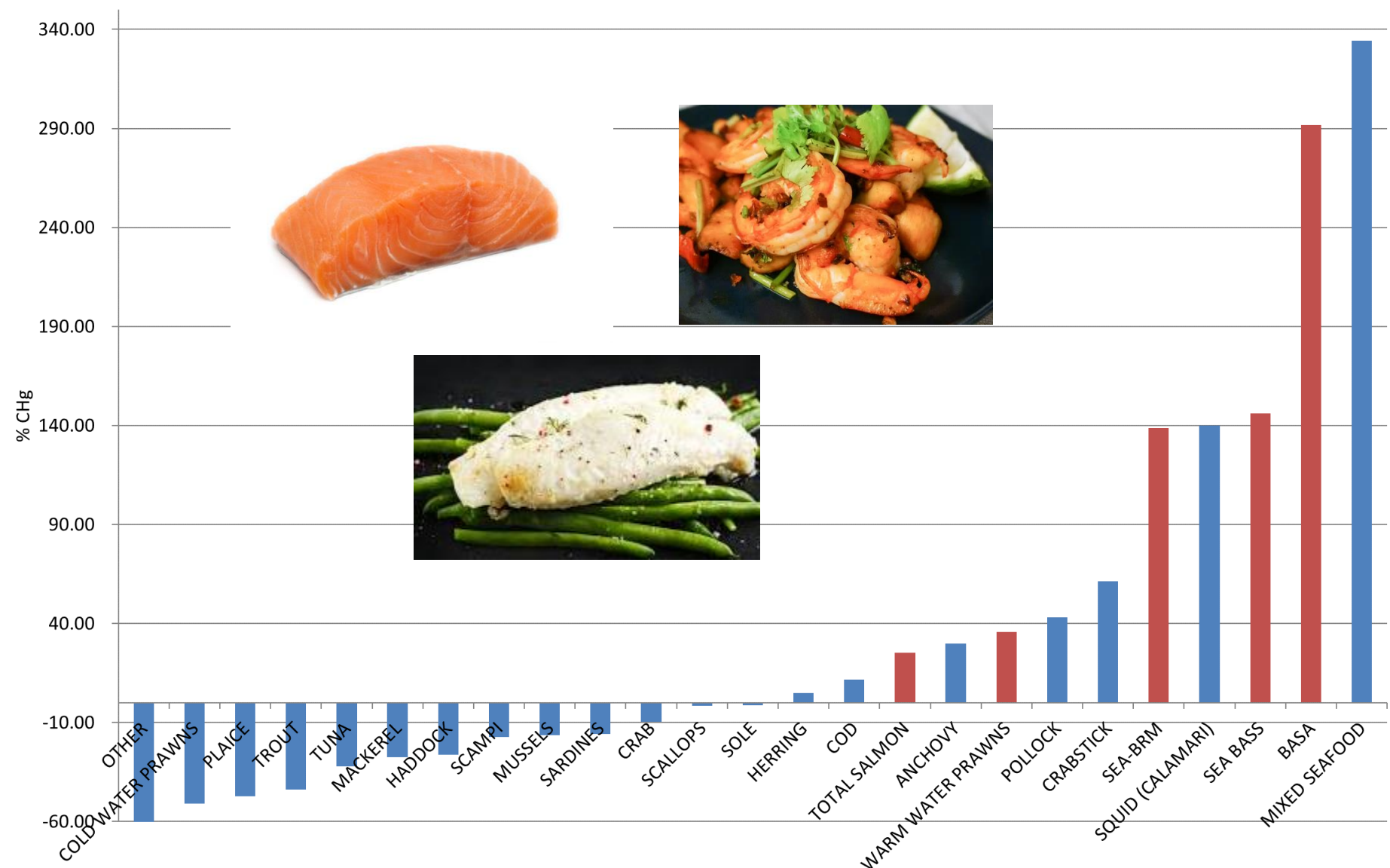
Challenge 2: Falling Demand for traditional Species



GB 'In Home' Seafood Species Trends



Farmed species in demand (2021 vs 2011) Volume Change



Challenge 3: UK Seafood Shopper



Out of all the proteins, fish is seen to be the most ‘scary’

An ‘alien’ fear – unknown and uncertain – afraid of something different

- Poor freshness quality & SMELL
- Price/waste
- Shoppers don't like choosing,
 - Most shoppers do not know how to identify fish with a high freshness quality
 - Counters- intimidated by “knowledgeable’ fish monger
- Don't like handling & preparing seafood
 - Don't like way it looks”
 - Don't like the or touch or bones
 - Don't know how to prepare it for cooking
- Interest but fear of trying something new
- Will pay extra for quality/freshness
- Try in foodservice buy in retail



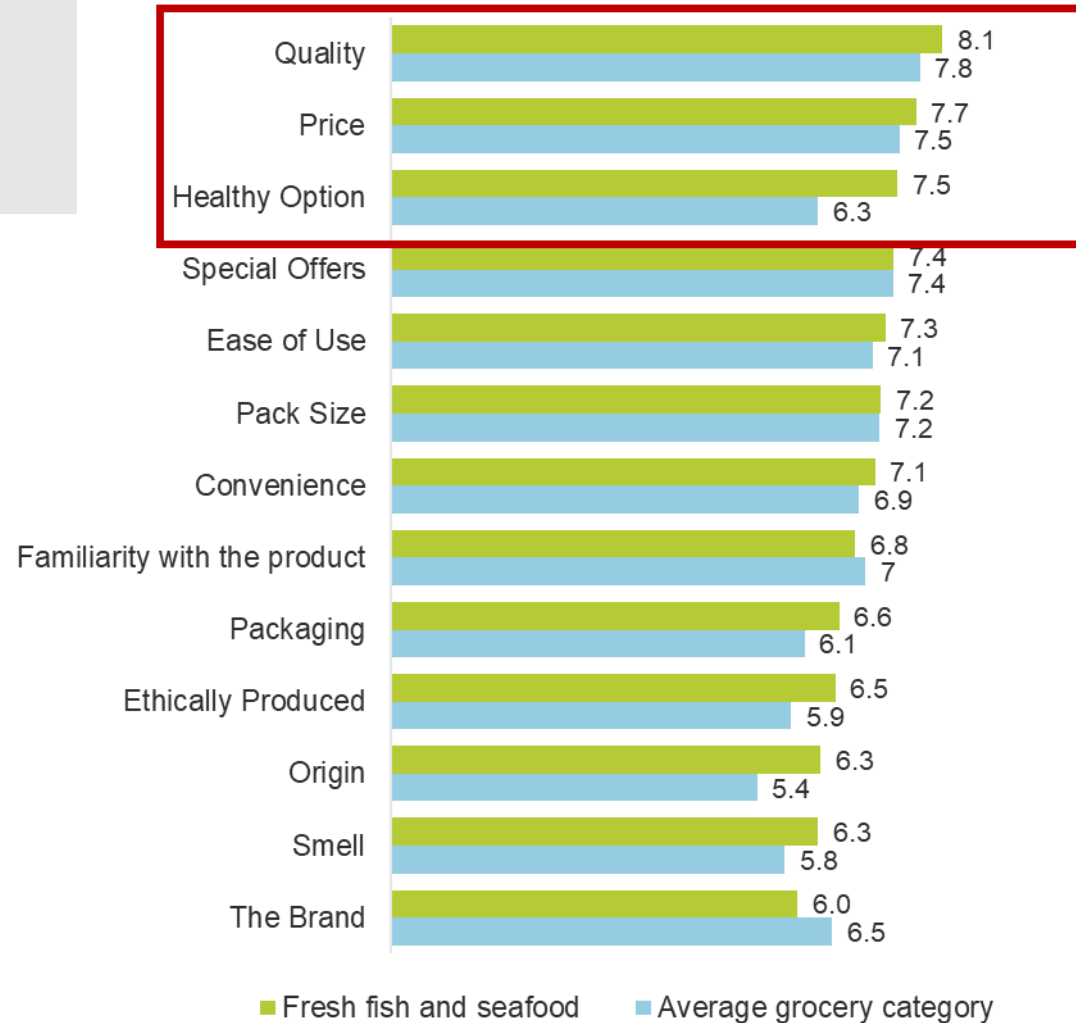
**“I have never bought xxxx
– I just don't really know
what I am supposed to do
with it?”**



Quality and price and health are most important to shoppers when purchasing chilled fish and seafood

Importance of different attributes in shoppers' purchase decisions – fresh fish and seafood

Mean score out of 10, where 1 is low importance and 10 is high importance



Thank you

Read our latest Factsheet: [Seafood in multiple retail \(2021 update\)](#)



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

Total seafood species performance to 2021

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2019 52wks to 19.6.19	2020 52wks to 19.6.20	2021 52wks to 19.6.21	% Chg '20 vs '21	% Chg 2011 vs 2021 (10YA)*	2019 52wks to 19.6.19	2020 52wks to 19.6.20	2021 52wks to 19.6.21	% Chg '20 vs '21	% Chg 2011 vs 2021 (10YA)*	Avg Price 2021 (£)	% Chg '20 vs '21	% Chg 2011 vs 2021 (10YA)*
TOTAL SEAFOOD	3,830,359	4,023,086	4,354,035	8.2	25.7	391,728	412,470	439,638	6.6	-9.0	£9.90	1.5	38.2
TOTAL SALMON	1,069,767	1,115,061	1,231,811	10.5	56.9	62,221	65,841	75,386	14.5	25.2	£16.34	-9.5	24.5
COD	487,113	508,598	543,847	6.9	39.2	59,932	60,962	63,672	4.5	11.6	£8.54	2.4	24.7
TUNA	412,364	450,404	429,825	-4.6	-2.6	60,858	68,061	66,631	-2.1	-32.1	£6.45	-2.5	43.5
WARM WATER PRAWNS	353,267	369,441	413,419	11.9	70.5	24,662	25,724	27,815	8.1	35.6	£14.86	3.5	25.7
HADDOCK	239,495	253,540	268,198	5.8	-6.6	24,625	26,553	27,816	4.8	-26.4	£9.64	1.0	26.9
MIXED SEAFOOD	198,506	193,261	212,323	9.9	440.6	21,522	20,875	22,123	6.0	334.3	£9.60	3.7	24.5
POLLOCK	147,363	171,228	190,391	11.2	66.4	31,284	33,865	37,486	10.7	43.0	£5.08	0.5	16.4
COLD WATER PRAWNS	165,323	162,604	187,709	15.4	-24.8	13,754	13,063	15,047	15.2	-51.0	£12.47	0.2	53.6
MACKEREL	131,355	138,677	133,628	-3.6	-0.4	17,562	17,650	16,632	-5.8	-27.5	£8.09	2.3	37.3
SEA BASS	67,126	77,282	96,825	25.3	209.0	4,185	4,720	5,787	22.6	146.3	£16.73	2.2	25.5
BASA	58,612	70,420	85,335	21.2	323.0	7,364	9,132	11,429	25.2	291.7	£7.47	-3.2	8.0
OTHER	71,886	76,707	78,419	2.2	-82.2	14,811	16,054	15,344	-4.4	-84.6	£5.11	7.0	15.5
SCAMPI	57,730	65,824	78,016	18.5	8.5	5,284	5,962	7,491	25.6	-17.3	£10.42	-5.7	31.2
SARDINES	40,533	44,202	42,626	-3.6	-2.1	8,464	9,238	9,450	2.3	-15.7	£4.51	-5.7	16.2
CRABSTICK	37,786	39,026	39,465	1.1	52.9	9,692	10,031	10,270	2.4	61.3	£3.84	-1.2	-5.2
TROUT	35,403	33,058	36,361	10.0	-4.0	2,456	2,194	2,256	2.8	-43.9	£16.12	7.0	71.2
SOLE	29,399	30,724	33,718	9.7	12.3	2,294	2,511	2,741	9.2	-1.3	£12.30	0.6	13.7
MUSSELS	24,199	24,399	27,124	11.2	-8.6	4,245	4,241	4,963	17.0	-16.6	£5.47	-5.0	9.5
CRAB	24,143	21,726	25,150	15.8	51.7	1,301	956	933	-2.5	-9.6	£26.97	18.7	67.8
SQUID (CALAMARI)	17,239	17,523	21,893	24.9	149.3	1,452	1,427	1,813	27.1	140.1	£12.08	-1.7	3.8
SCALLOPS	17,449	17,224	21,785	26.5	24.1	727	708	887	25.3	-1.6	£24.56	1.0	26.1
ANCHOVY	12,562	14,763	19,557	32.5	39.1	744	829	1,284	54.8	30.0	£15.24	-14.4	7.0
PLAICE	19,704	18,325	17,513	-4.4	-36.0	1,814	1,563	1,463	-6.5	-47.2	£11.97	2.2	21.1
HERRING	13,517	14,276	15,423	8.0	21.4	2,028	2,196	2,676	21.9	4.9	£5.76	-11.3	15.7
SEA-BRM	15,293	14,204	14,179	-0.2	170.7	1,003	1,010	976	-3.3	138.6	£14.53	3.3	13.4

*Other- cheaper unidentified whitefish Nielsen Scantrack YE 19.06.21(*10yr GB)

Multiple reasons for paying extra for chilled fish

