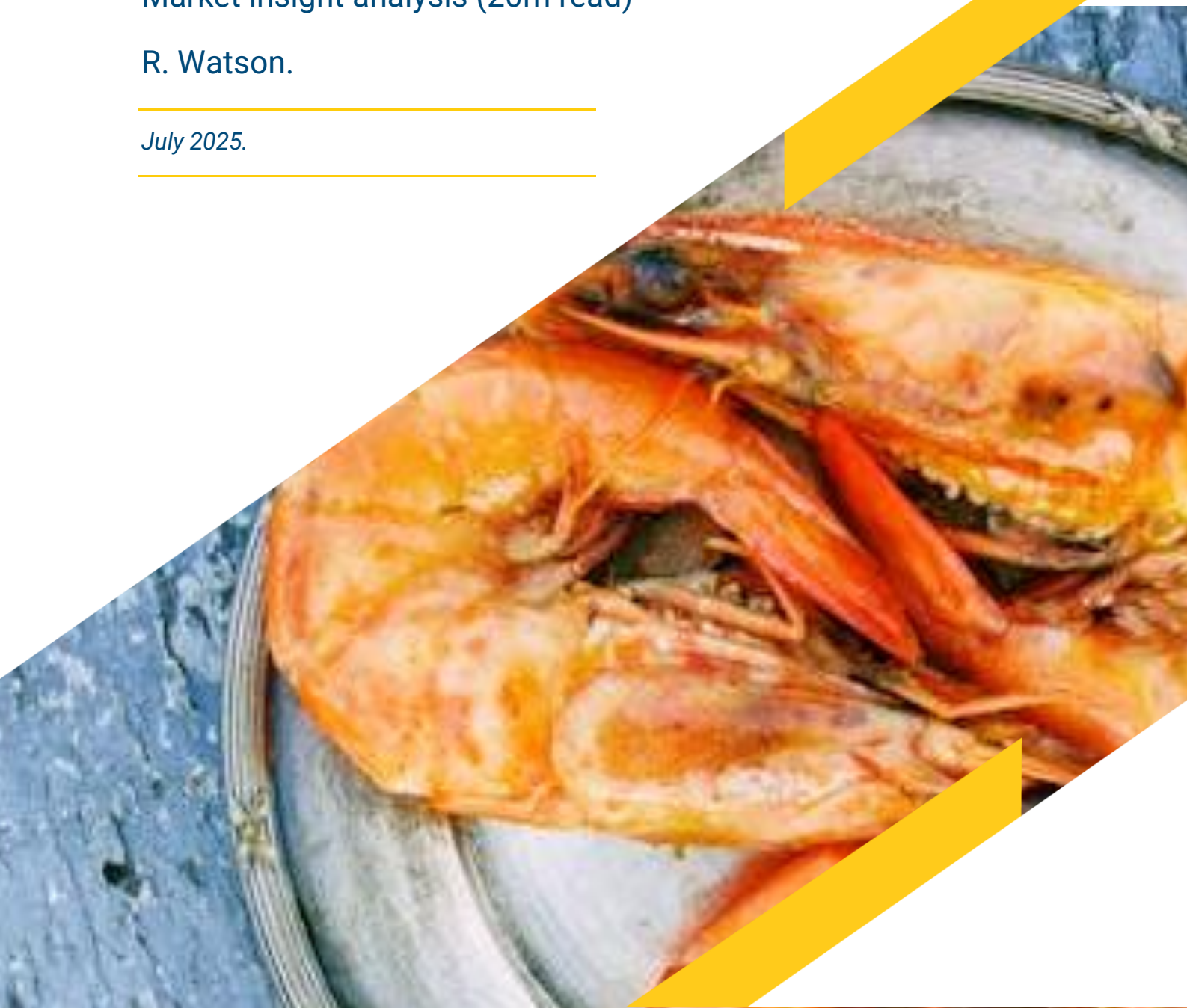
Here to give the UK seafood sector
the support it needs to thrive.

Shellfish in Multiple Retail 2025

Market insight analysis (20m read)

R. Watson.

July 2025.



Types of shellfish

Seafood can be categorised into three main groups: demersal, which includes whitefish such as cod and haddock. Pelagic and oily fish such as salmon and mackerel, and shellfish.

Commonly eaten types of shellfish include:

Crustaceans:
Crustaceans are the jewels of the seafood world, prized for their sweet, succulent meat and versatility in global cuisines. These shell-covered delicacies include crabs, lobsters, shrimp, prawns, and crayfish, each offering unique textures and flavours.

Bivalves (molluscs): Bivalves are a category of shellfish often prized in Mediterranean cuisines for their delicate flavour, versatility, and freshness. They include mussels, oysters, clams, and scallops, all of which share the hallmark of having two hinged shells.

Gastropods/Cephalopods (molluscs): These shellfish offer some of the most intriguing textures and flavours in seafood cuisine. Gastropods, such as whelks, have a firm, chewy texture, whilst cephalopods like squid, octopus, and cuttlefish are prized for their tender yet meaty bite when cooked properly. Popular in Mediterranean and Asian cuisines, squid ink adds depth to pastas and risottos, while grilled octopus with olive oil and lemon is a delicacy in many coastal regions.

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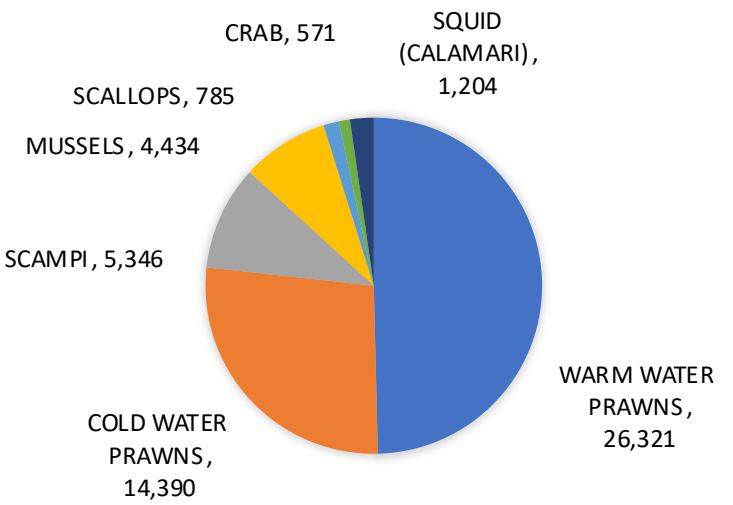
Shellfish performance

Shellfish makes up the smallest sector of seafood retail sales, currently taking a 19% value and 15% volume share of total seafood sales. In contrast to pelagic and oily fish (including salmon and tuna) and the whitefish sectors, which together make up over 80% of value and volume sales. Over the long term, shellfish consumption has increased, up +5.9% since 2016, but the shellfish share of overall seafood is shrinking.

In the 52 weeks to July 2025, shellfish UK retail seafood sales were worth £852m (+4.1%), with a volume of 54,862 tonnes (+1.0%) and an average price of £15.53/kg (+3.1%). Its high average price makes it the sector with the highest average price, nearly double that of the white fish sector.

UK shellfish species retail sales 2025 (volume tonnes)



Shellfish

Worth: £852m (+4.1%)
Volume: 54,862t (+1.0%)
Val Share: 19.0% (+0.1pp)
Vol Share: 15% (+0.0pp)

Vs 9 Years ago
Value: +27.4%
Volume: +5.9%
Val Share: +0.5pp
Vol Share: -0.7pp

Nielsen Scantrack YE 05.07.25

Key Facts – This year vs last year

- **Shellfish in growth.** In the 52 weeks to July 2025, shellfish UK retail seafood sales were worth £852m (+4.1%), with a volume of 54,862 tonnes (+4.1%) and an average price of £15.53/kg (+3.1%).
- **Only chilled shellfish in full growth,** frozen and ambient shellfish sectors were in volume decline vs last year
- **Prepared, sauce and battered shellfish segments were in full growth**, with volume sales up around +10%. Shellfish cakes experienced a heavy volume decline of -63%.
- **Warm water prawns dominate shellfish sales** and remain in growth (+5.4%). Selling nearly double that of the next most popular species (cold water prawns)

- **2025 saw a move to higher-priced shellfish.** Warm water prawns, crab, lobster and crayfish were in full growth of up to +27% vs last year and have an average price significantly higher than that of the shellfish average, £15.53/kg.

Key Facts - Long Term: (9 yrs)

- **Shellfish in long-term growth.** Compared to 2016, shellfish consumption grew faster than either the whitefish or pelagic sectors, volume up +5.9%, but is losing share to the whitefish and pelagic sectors.
- **Ambient shellfish** had the long-term **highest inflation** of +30%, compared to chilled shellfish with the lowest at +19%.
- **Chilled and frozen shellfish are driving growth.** Chilled (+5.7%) and frozen (+9.1%) shellfish grew volume sales, whilst ambient declined heavily (-75%).
- **Natural, prepared, sauce, breaded and battered shellfish in long-term growth.** Battered shellfish recorded the highest long-term growth, increasing volumes by +212%, mirroring the general demand for battered seafood.
- **Out of the popular shellfish, only warm water prawns (+35%), mussels, squid and shrimp grew volume sales over the long term.** Shrimp (+381%) and langoustine (+89%) showed the highest volume growth, whilst crayfish, cockles, lobster and crab had the highest decline.



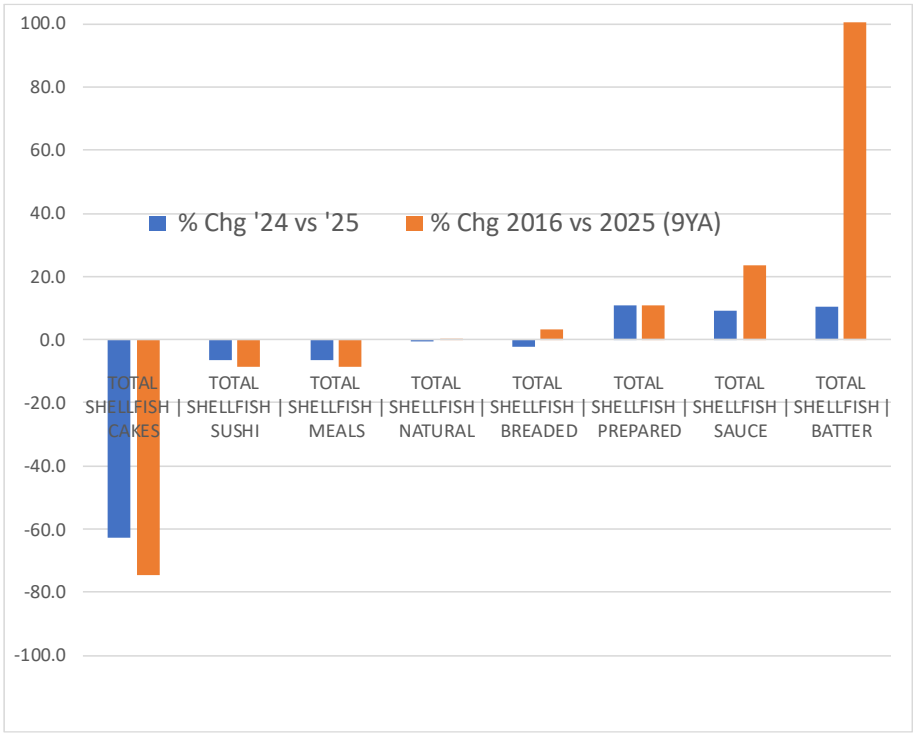


UK shellfish sales to 2025

	Value Sales £ ('000)					Volume Sales (tonnes)					Price per Kg		
	2023 52wks to 05.07.23	2024 52wks to 05.07.24	2025 52wks to 05.07.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	2023 52wks to 05.07.23	2024 52wks to 05.07.24	2025 52wks to 05.07.25	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)	Avg Price 2025 (£)	% Chg '24 vs '25	% Chg 2016 vs 2025 (9YA)
FISH	4,421,168	4,585,136	4,751,198	3.6	34.1	397,141	406,919	410,101	0.8	3.4	£11.59	2.8	29.7
FRESH	2,704,974	2,841,263	3,016,551	6.2	38.6	178,442	180,594	187,579	3.9	8.6	£16.08	2.2	27.6
FROZEN	1,113,284	1,110,258	1,085,225	-2.3	28.0	130,766	136,009	130,091	-4.4	-3.1	£8.34	2.2	32.0
AMBIENT	602,909	633,615	649,423	2.5	25.3	87,933	90,316	92,432	2.3	3.0	£7.03	0.2	21.8
TOTAL WHITEFISH	1,350,461	1,383,367	1,369,667	-1.0	23.8	155,571	162,638	156,156	-4.0	2.0	£8.77	3.1	21.3
TOTAL SHELLFISH	828,147	817,996	851,765	4.1	27.4	56,095	54,307	54,862	1.0	5.9	£15.53	3.1	20.3
TOTAL PELAGIC	1,950,192	2,073,731	2,204,395	6.3	37.0	155,888	159,333	168,213	5.6	-2.2	£13.11	0.7	40.2
CHILLED SHELLFISH	496,711	498,166	535,260	7.4	26.2	31,031	30,329	31,376	3.5	5.7	£17.06	3.9	19.4
FROZEN SHELLFISH	321,210	310,064	307,277	-0.9	32.9	24,358	23,315	22,849	-2.0	9.1	£13.45	1.1	21.8
AMBIENT SHELLFISH	10,226	9,766	9,228	-5.5	-31.0	706	663	637	-3.8	-47.0	£14.48	-1.8	30.2
TOTAL SHELLFISH | NATURAL	443,162	441,613	446,613	1.1	14.4	25,296	25,115	25,051	-0.3	0.4	£17.83	1.4	14.0
TOTAL SHELLFISH | PREPARED	104,352	96,918	108,120	11.6	39.6	5,774	5,375	5,949	10.7	10.9	£18.18	0.8	25.9
TOTAL SHELLFISH | SAUCE	90,454	93,184	106,673	14.5	44.2	7,879	7,691	8,410	9.4	23.6	£12.68	4.7	16.7
TOTAL SHELLFISH | BREADED	85,022	83,895	86,449	3.0	35.8	6,724	6,672	6,532	-2.1	3.1	£13.24	5.3	31.7
TOTAL SHELLFISH | BATTER	38,334	43,089	47,658	10.6	360.0	2,590	2,720	2,999	10.2	212.0	£15.89	0.3	47.4
TOTAL SHELLFISH | MEALS	52,539	45,752	45,875	0.3	26.6	6,617	5,608	5,237	-6.6	-8.7	£8.76	7.4	38.6
TOTAL SHELLFISH | SUSHI	8,392	8,835	8,935	1.1	34.4	512	536	501	-6.6	-8.7	£17.83	8.2	47.3
TOTAL SHELLFISH | CAKES	4,252	3,902	1,443	-63.0	-74.6	536	496	185	-62.8	-74.6	£7.81	-0.6	0.1
TOTAL SHELLFISH | DUSTED	1,638	809	0	NA	NA	167	94	0	NA	NA	£7.96	-7.3	NA
WARM WATER PRAWNS	432,565	428,053	456,073	6.5	61.2	26,190	24,964	26,321	5.4	35.4	£17.33	1.1	19.0
COLD WATER PRAWNS	206,744	207,898	210,159	1.1	2.6	14,755	14,704	14,390	-2.1	-14.3	£14.61	3.3	19.7
SCAMPI	67,388	67,107	69,405	3.4	24.7	5,656	5,466	5,346	-2.2	-4.7	£12.98	5.8	30.9
MUSSELS	28,501	28,463	27,558	-3.2	15.2	4,773	4,730	4,434	-6.3	4.9	£6.22	3.3	9.8
SCALLOPS	18,371	19,015	19,978	5.1	-3.3	715	780	785	0.6	-19.6	£25.45	4.4	20.2
CRAB	18,304	17,048	18,963	11.2	-35.6	582	536	571	6.5	-65.2	£33.21	4.4	85.1
SQUID (CALAMARI)	21,622	18,769	16,997	-9.4	41.8	1,581	1,367	1,204	-12.0	30.4	£14.12	2.9	8.7
SHRIMPS	13,341	13,324	10,561	-20.7	156.0	750	782	616	-21.3	381.0	£17.15	0.7	-46.7
LOBSTER	10,095	6,133	7,403	20.7	-53.3	365	221	280	26.5	-61.2	£26.42	-4.6	20.4
COCKLES	4,020	3,601	3,940	9.4	-36.7	335	293	319	9.0	-46.7	£12.35	0.4	18.6
CRAYFISH	1,386	2,316	2,930	26.5	-67.3	38	61	77	25.5	-84.5	£38.02	0.8	111.2
PRAWN	-	13	2,411	NA	NA	-	1	204	NA	NA	£11.81	-5.0	NA
OYSTERS	1,917	1,848	1,817	-1.7	6.5	116	96	79	-18.1	-9.5	£23.08	20.0	17.3
CLAMS	1,255	1,496	1,295	-13.5	50.9	111	146	114	-22.0	-9.0	£11.38	10.9	66.4
LANGOUSTINE	582	1,156	965	-16.5	9.9	28	73	51	-30.4	88.8	£18.93	19.9	-42.8
OCTOPUS	2,054	1,756	891	-49.3	63.4	100	85	41	-51.4	28.7	£21.62	4.3	28.2

Nielsen Scantrack YE 05.07.25 (%Chg. 9yr UK)

UK shellfish segment change performance to 2025



Nielsen Scantrack YE 03.05.25

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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the support it needs to thrive.

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