

Seafood Snapshot

Welsh consumers get an appetite for shellfish as latest Kantar Worldpanel data show retail sales increase.

Welsh retail sales of shellfish and prepared fish are up 15% and 14% respectively (year to September 2016).

This is good news for Welsh producers and the 475 jobs in the production sector where shellfish dominates with mussels, cockles and whelks being particularly important

Welsh retail sales of all seafood were down 1.9% year on year to £141m. Despite an increase in the frequency of seafood purchases (up 1%) and an increase in the price per kilo (up 1%), shoppers have been buying less volume per trip (-2.7%), and therefore the total volume was down 2.9%.

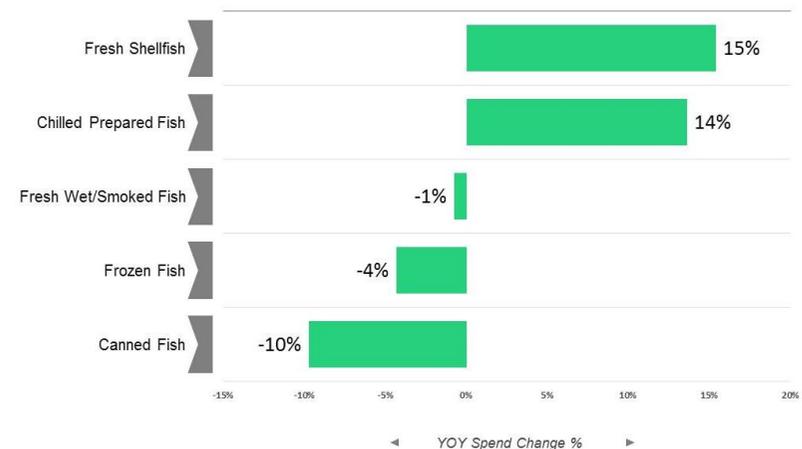
In contrast GB seafood sales were up 1.4% to £2.67bn. GB total volume is growing at 1%; although shoppers bought less per trip (-1.5%) they bought more often (+1.6%). Increased price per kilo (0.4%), and population growth (1%) worked to increase the overall spend by £35.7m. GB seafood shoppers are more affluent and younger than their Welsh counterparts, which may explain why the change in price did not impact volume purchases as much as in Wales.

Fresh products account for 47% of Welsh seafood retail sales value, worth £65.8m in the year to September 2016 - up 4%. This was driven by the substantial increase in shellfish, to £9.8m and chilled prepared fish to £12.9m. There was a small decline in fresh wet and smoked fish, down 1% year on year to £43m.

The increase in sales of fresh chilled and shellfish comes at the cost of the frozen sector, which saw sales value of products such as breaded and

battered fish down year on year. It still remains an important sector, with retail sales of £45.2m. The value of canned fish sales fell to £30m.

Total Fish and Seafood | Total Wales | 52we 11 Sept 2016



In Wales, the hard discounters (Aldi and Lidl) have 14.7% share while the 'premium' stores (Waitrose and M&S) have 12% with their share gains coming from Tesco, Asda and Sainsbury's over the last 12 months. Whilst Tesco accounts for the largest proportion of sales, at £33.9m, year on year sales were down 8%. Lidl sales of seafood grew by 28% to £9.9m and M&S up 17% to £11m. It remains a fiercely competitive market.