Prawns is it a race to the bottom? If not, why not?

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Circana CREST data to year ending June 2026.



Welcome to the UK and welcome to the ICWPF Conference

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Trade

A snapshot of Prawn’s position and performance.

Cold water prawns – UK supply and trade

- Note: The UK import data is available to an 8-digit commodity (CN8) level meaning most traded prawn products can't be distinguished between warm water or cold water. Instead, most are categorised under a broader "miscellaneous processed/preserved" prawn category. Therefore, cold water share of all prawn imports is estimated based on country of origin.

Import overview

- Shrimp and prawn products were the 2nd top imported “species” to the UK by value in 2025 at £615.9m, behind salmon.
- However, shrimp and prawn products are not distinguished between warm and cold-water species.
- Cold water prawns are estimated to make a 21% share of total UK shrimp and prawn imports in 2025 down from 22% in 2024.
- An estimated 17,490 tonnes of cold-water prawns was imported to the UK in 2025, worth £129.9m.
- This was 1.8% higher than the estimated volume imported in 2024.
- Origin counties of Coldwater prawn imports to the UK included Iceland (~6,300t), Greenland (~5,200t), Norway (~3,200t) and Canada (~2,500t).
- Prices for imported cold water prawns were 0.6% lower than in 2024 on average.

Landings overview

- In 2025, wild-capture prawns (Brown shrimp and common prawns) landed at UK ports totalled 393 tonnes, worth £1.8m.
- This was a decline of 173t (-30.6%) compared to landings in 2024.
- Landings peak in October

Export overview

- In 2025 the UK exported ~1,400 tonnes of shrimp and prawn products worth £11.6m
- This was down 1,160 tonnes (-45.4%) compared to in 2024.
- This includes a mix of both warm and cold-water species.
- There is little to no warm water prawn production in the UK, therefore exports are likely re-exports of imported products.
- Exports of prawns from the UK were destined for the EU (82%), Vietnam (4.2%), Ukraine (3.8%), Iceland (3.0%) and USA (2.6%) by value.

Is it a race to the bottom?

A snapshot of Prawn’s position and performance.

Prawns in food service – (includes both warm and cold water)

Prawn* data indicates mixed momentum within seafood.

Theme	Key Finding
Market position	Prawn ranks first among seafood species by estimated volume sold.
Decline	Estimated Prawn volume reached 10,903 tonnes, down 9.5% annually.
Channels	Quick Service accounts for 34.9% of servings; mixed results for all other channels.
Consumer profile	Prawn skews older and female, with most servings from adult-only parties.
Daypart and day	Prawn is more concentrated at Dinner, with Sunday and Saturday leading by day.
Seasonality	Prawn shows peaks in September and November, with a winter drop.
Motivation	Functionality is the leading Prawn motivation, followed by socialising occasions.

Source: Circana CREST | Year Ending June 2026.

** Species results are limited, with channel data for prawns based on a low sample and should be treated as indicative. Caution should be used when interpreting these results.*

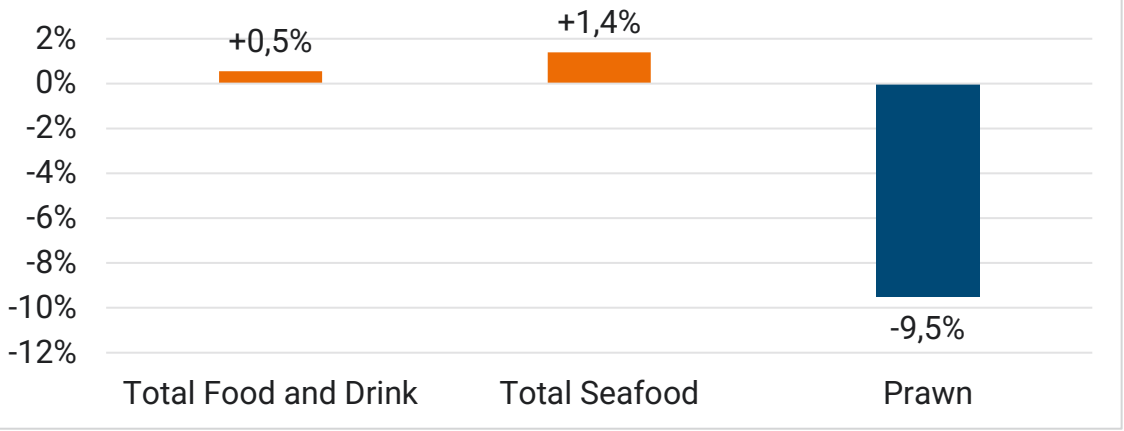
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Market Context in Food service

Prawn* shows signs of decline amongst a growing food and drink market and seafood category.

Total Food and Drink	Total Seafood	Prawn
31.0 billion Servings	**736.8 million** Servings	**77.9 million** Servings
+0.5% Annual servings growth	**+1.4%** Annual servings growth	**-9.5%** Annual servings growth

Annual Servings Growth (%)



Share of Parent Market

Category	Share of Parent Market (%)	Annual Share Change (ppt)
Total Seafood of Total Food and Drink servings	**2.4%**	**0.0ppt**
Prawn of Total Seafood servings	**10.6%**	**-1.3ppt**

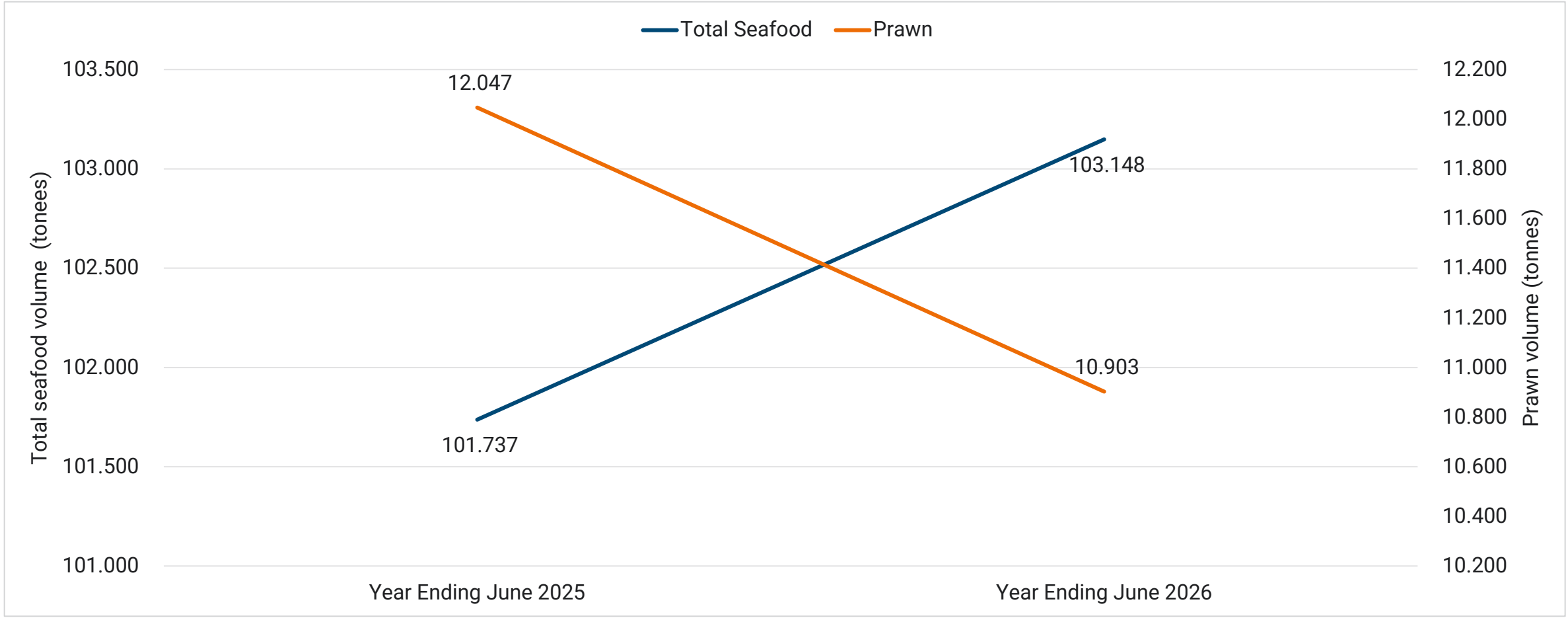
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Volume Trends in food service ‡

Prawn* fell 9.5% as Total Seafood grew 1.4%.



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‡ CREST® survey data now runs from April 2024 only with first full 12-month data available from YE March 2025.

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Species Performance

How Prawn compares across the seafood category.

Top 10 Species by Volume in food service

Prawn* ranks first by volume†, with reported declines of 9.5% and a 1.3ppt share drop.

Species	Volume (tonnes)	Volume (growth)	Seafood Share	Share Change (ppt)	Rank
Total Seafood	103,148	**+1.4%**	-	**-**	-
Prawn	10,903	**-9.5%**	10.6%	**-1.3**	1
Cod	10,363	**+7.2%**	10.0%	**-0.9**	2
Tuna	8,970	**+8.2%**	8.7%	**+0.5**	3
Salmon	7,091	**-12.7%**	6.9%	**-1.1**	4
Haddock	6,341	**-4.8%**	6.1%	**-0.4**	5
Scampi	3,035	**+60.3%**	2.9%	**+1.1**	6
Calamari	1,580	**-2.2%**	1.5%	**-0.1**	7
Seabass	1,458	**-26.2%**	1.4%	**-0.5**	8
Mackerel	1,150	**-40.1%**	1.1%	**-0.8**	9
Sardine	1,142	**-25.0%**	1.1%	**-0.4**	10

Source: Circana CREST | Year Ending June 2026.

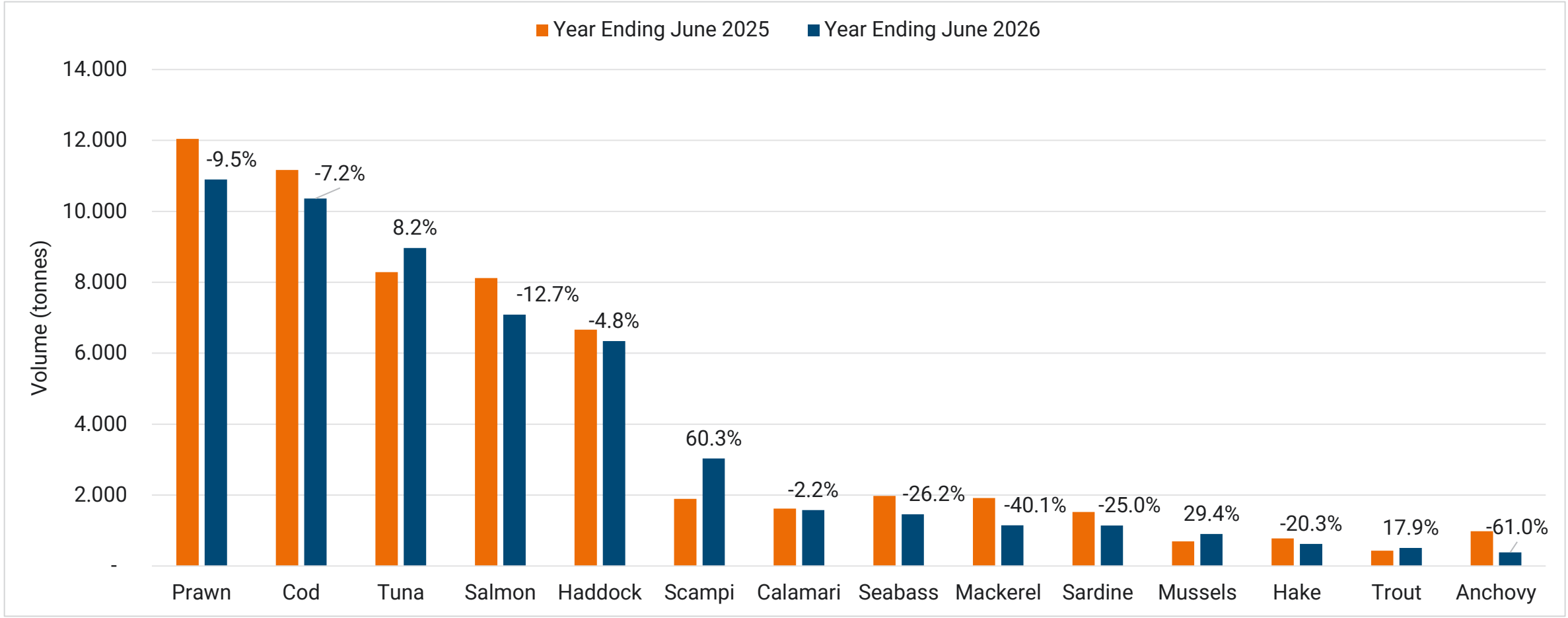
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† Volumes shown in tonnes are estimates, calculated using servings sold × 140g recommended serving size ÷ 1,000.

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Species Volume† and Growth – both CWP and WWP

Prawn* shows reported declines of 9.5%, in line with Prawn, Cod and Salmon while Tuna experienced growth.



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† Volumes shown in tonnes are estimates, calculated using servings sold × 140g recommended serving size ÷ 1,000.

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Cold water prawns in retail

- Cold water prawns are the eighth most popular seafood, and second most popular shellfish species by both volume and value sold in UK multiple retail. Warm water prawns are currently number one
- Cold water prawns currently take a 3.9% value and 3.1% volume share of total seafood sales.
- Only Ambient cold water prawns in full growth, as chilled and frozen volumes struggle. Chilled cold water prawns currently make up the largest proportion of sales by both value and volume, followed by frozen. Ambient make up a small (x% of cold water prawn sales but remain the only sector in full growth with value up 58% and volume up 60% form a small base. Chilled cold water prawns are in price driven growth, whilst frozen cold water prawns were in full decline with volume sales falling -11.9%
- The popularity of cold water prawns had been declining inline with the growth of warm water sales over both the long and short term
- Aldi, Lidl and M&S overtrade in cold water prawns. Tesco take the largest share of sales, closely followed by Aldi.
- Nielsen demographics define the cold water prawn shopper as older and younger and slightly less affluent (lower percentage of AB/C1 shoppers) than the general seafood shopper, with a high proportion of shoppers in the 65+ age group, typically in smaller one and two person households, with a lower proportion of children present compared to total seafood. Cold water prawns are a strongly female purchase.

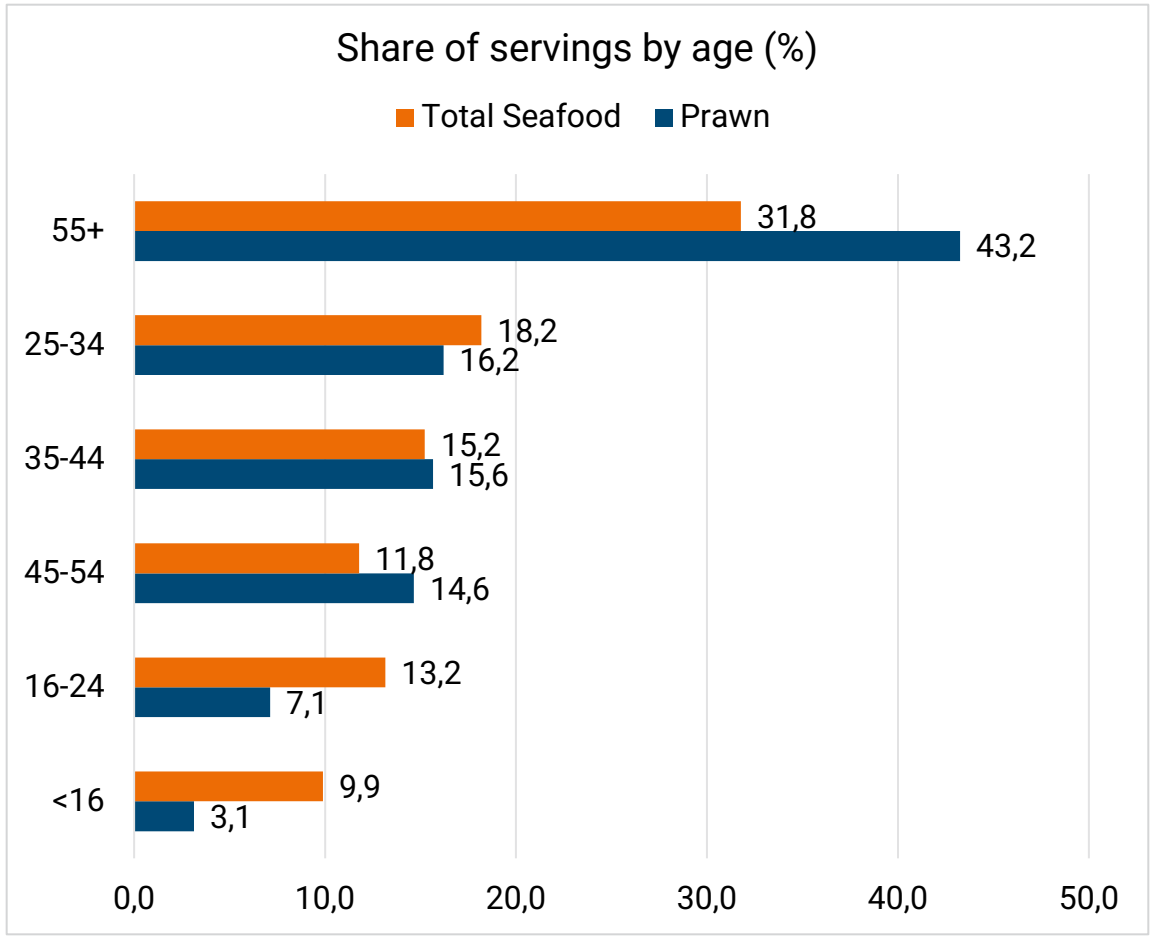
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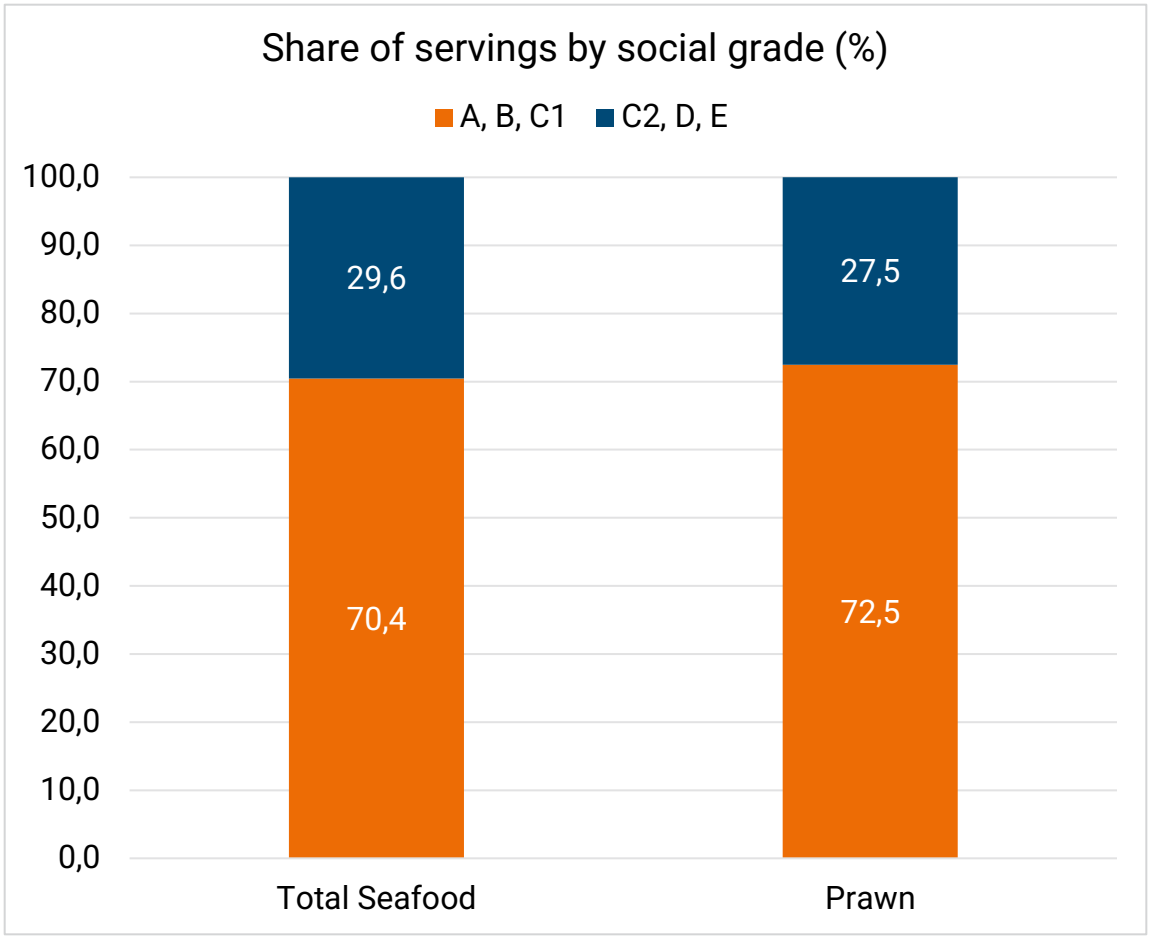
Consumer Profile and Consumption Trends

Who consumes Prawns, when, why, and how it compares with Total Seafood.

Consumer Profile: Age and Social Grade

Prawn* skews older than Total Seafood, social grade is broadly similar.



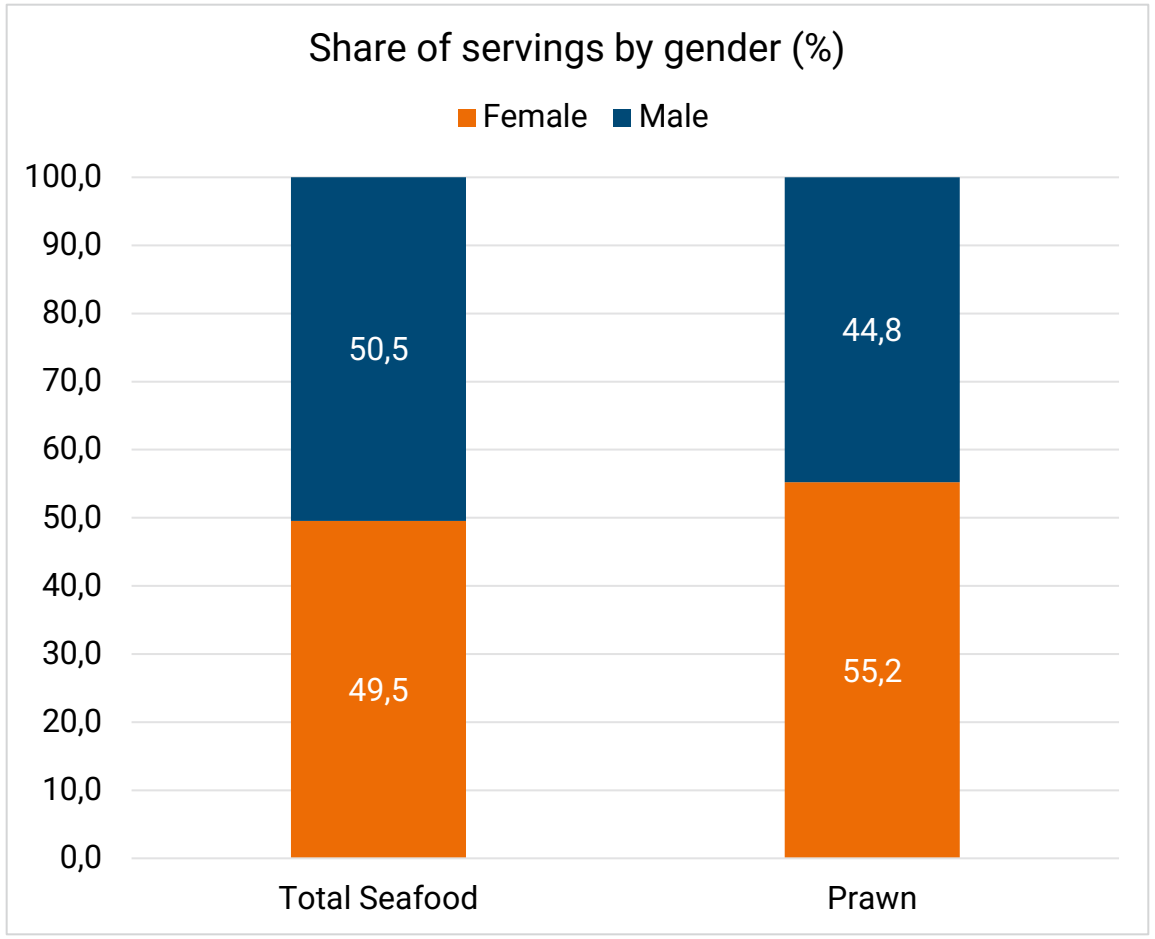


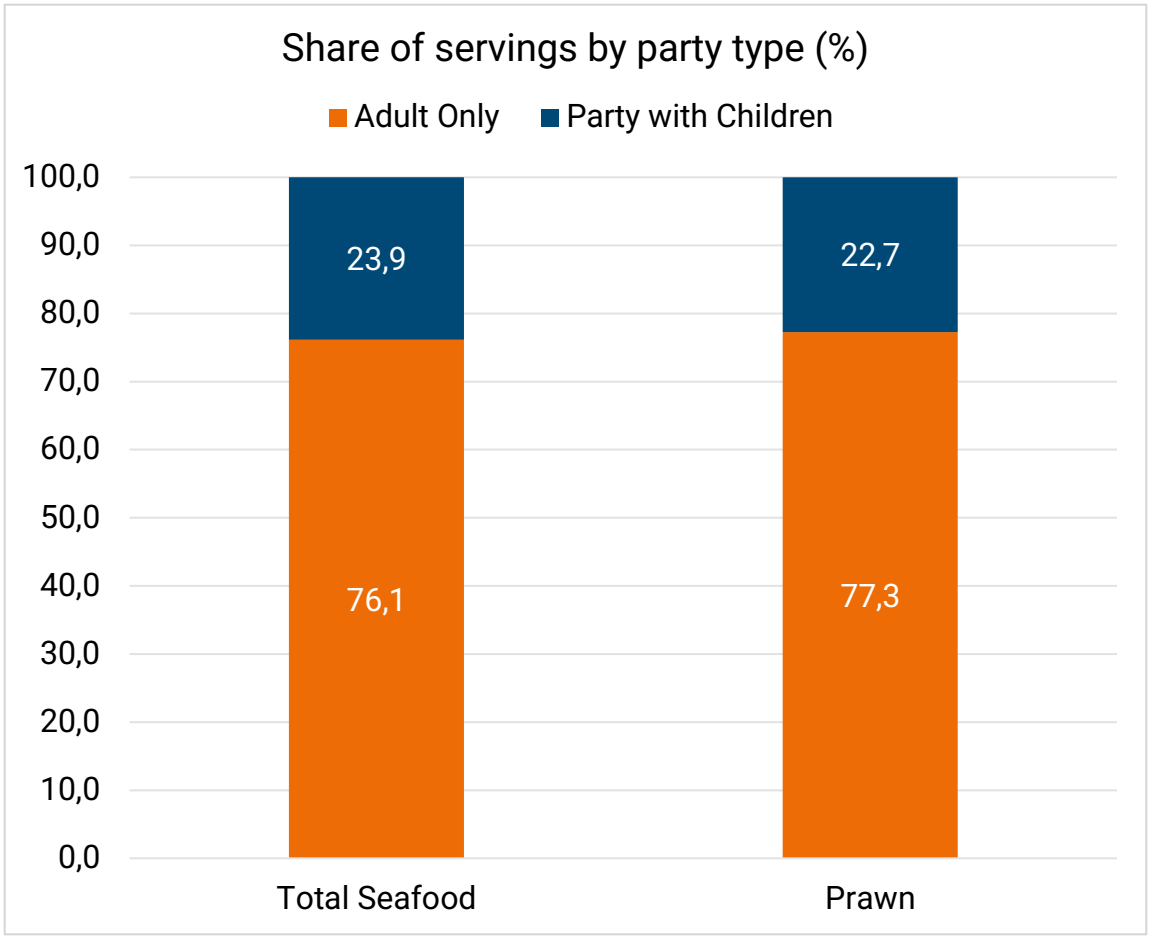
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Consumer Profile: Gender and Party Type

Prawn* skews more female than Total Seafood, while party type is broadly similar.



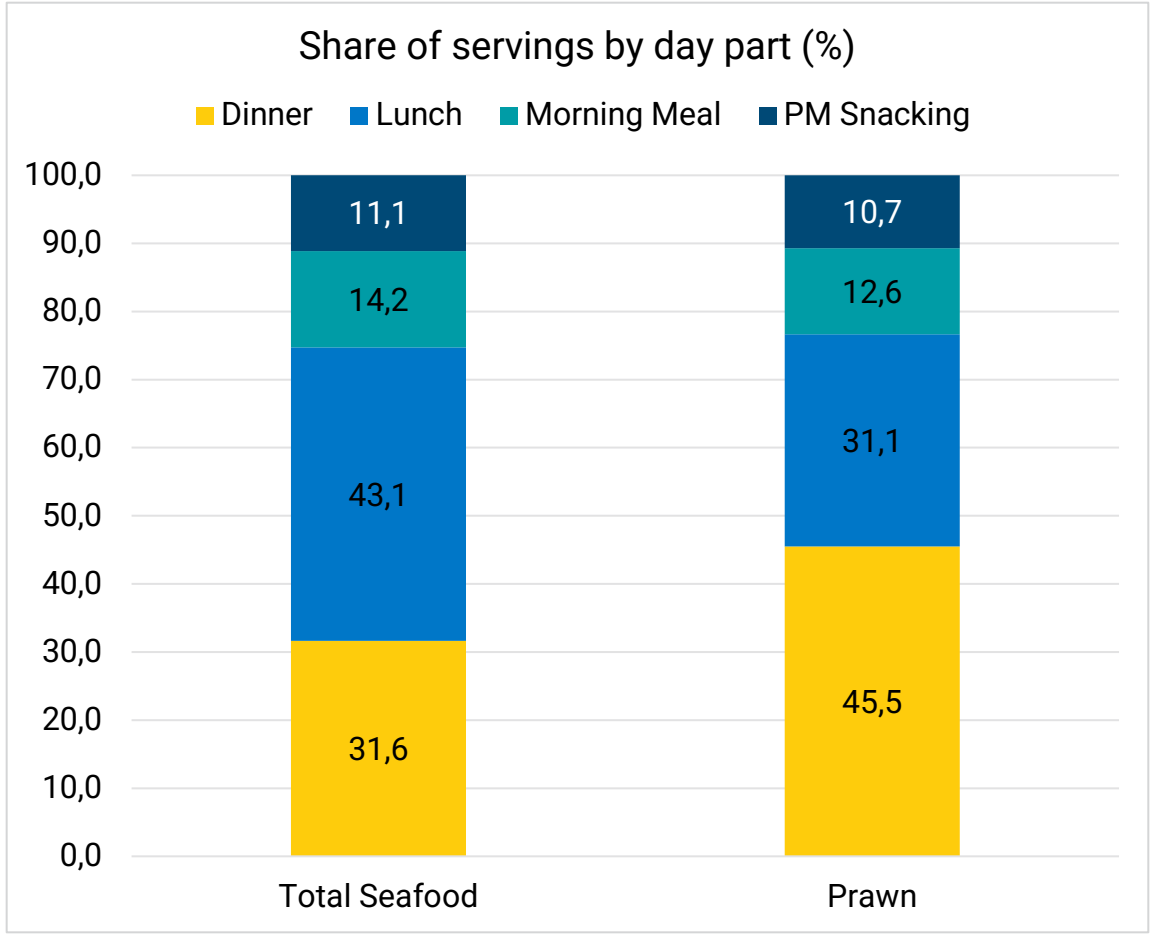


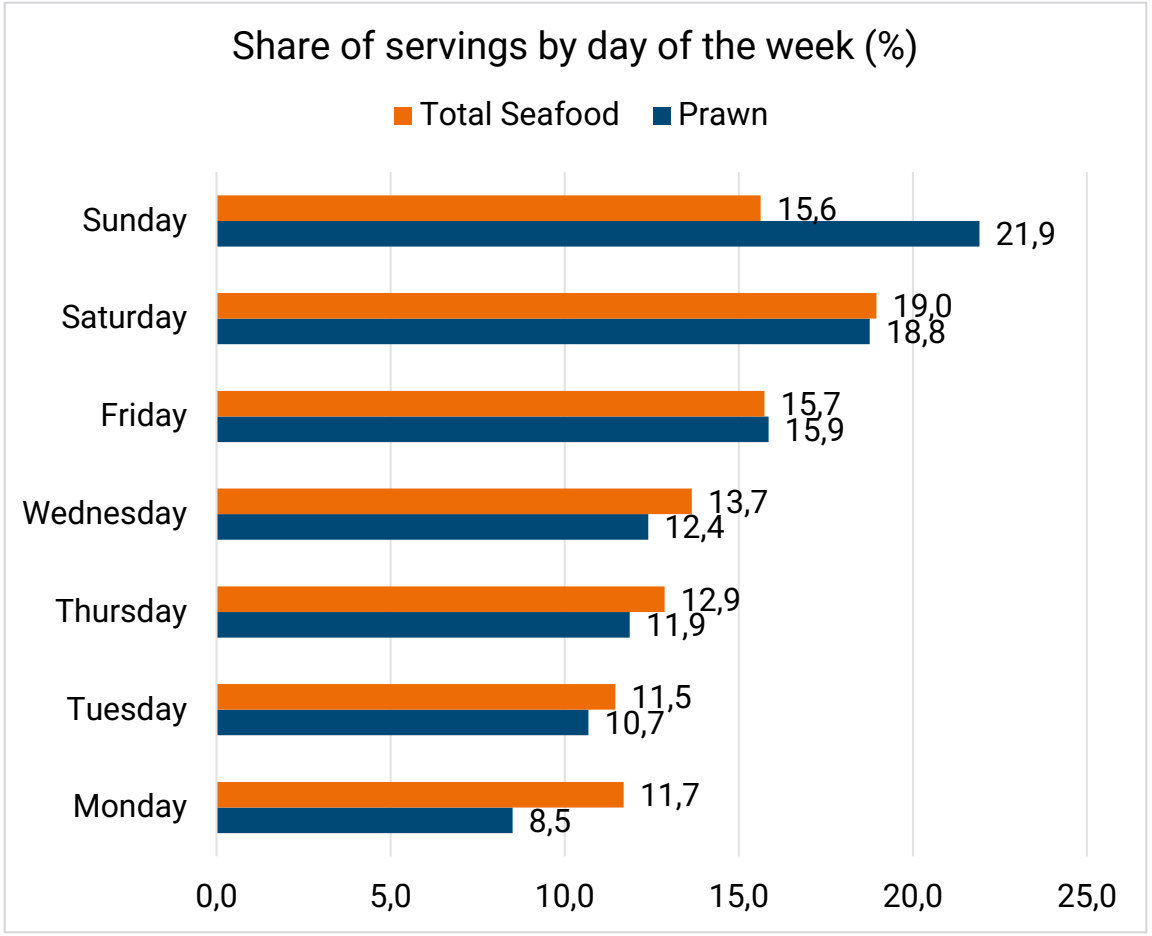
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Occasion Profile: Daypart and Day of Week

Prawn* is more concentrated at dinner and on Sundays than Total Seafood.





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If not, why not

Key considerations for future category and channel activity.

The cold-water prawn (Pandalus borealis) is known across the world for its delicate, sweet flavour with a firm and juicy texture to the meat. The cold-water prawn is a great source of protein and low in fat, making it a healthy and nutritious delicacy.

Royal Greenland

Key opportunities for Cold Water Prawns

The UK remains the world's leading market for cooked and peeled cold-water prawns, with 98 million servings sold in 2024 at an average price of £9.50.

Flavour innovation emerges as a central growth driver.

Operational efficiency is equally important. Pre-peeled, portion-controlled and pre-marinated prawns streamline preparation and reduce labour intensity in high-volume kitchens.

structural pressures in the warm-water prawn market—ranging from high pricing and tariff uncertainty to sustainability and supply chain volatility

Although quick-service restaurants currently dominate prawn sales, full-service restaurants and pubs present untapped headroom.

Their core advantages include:

Strong provenance and traceability

Consistent texture and flavour performance

Recognised sustainability credentials

Operational efficiency through peeled and portioned formats

The prawn is a good source of protein and selenium, is low in calories, and is high in vitamin B12.

Nutrition as a market driver

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Commercial Considerations in Food Service

Based on analysis in this report, the following considerations stand out for Prawn* in GB foodservice.

Theme	Implication
Protect core channels	Quick Service remain Prawns core channel, but reported growth is behind Total Seafood, highlighting the need to protect visibility and availability.
Explore growth channels	Full Service Restaurants combine meaningful scale with strong reported growth, making them a priority for further investigation.
Broaden reach	Fish and Chip Shops under-index but show positive Prawn growth, suggesting potential headroom where channel fit is right.
Targeting and timing	Older and female audiences stand out, while dinner, functionality and September/December peaks provide directional activation cues.

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Wide usage

The versatility of cold water prawns

- Because prawns retain texture under heat and absorb marinades effectively, they are now featured across a wide range of applications:
  - Street food bowls and wraps
  - Premium sandwiches and food-to-go formats
  - Pasta, rice, and noodle dishes
  - Sharing plates and starters
  - Emerging concepts such as prawn burgers

reinforces prawns' positioning as an "accessible luxury" — premium enough to justify higher price points, yet familiar enough to encourage repeat purchase and menu penetration.

Fish Focus

Thank you

Jennifer Robson

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