

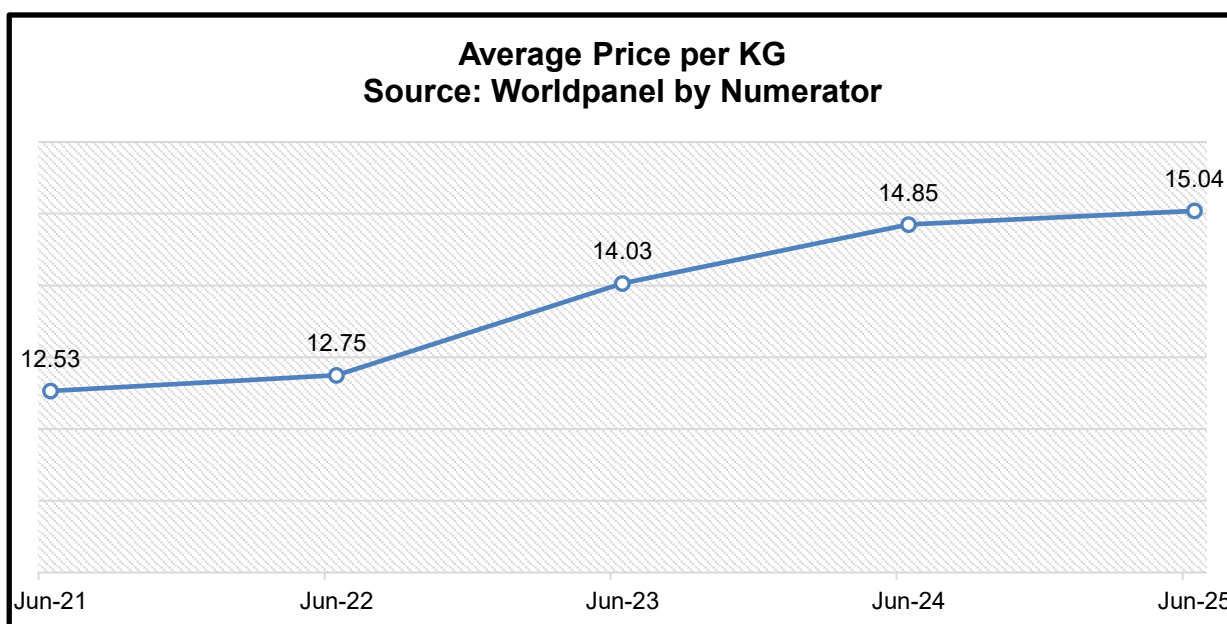
Irish retail seafood sales: A mid-year review of trends and insights

In the first half of 2025, the Irish retail seafood market witnessed continued growth in sales, reflecting a 1.8% increase year on year, according to data from Worldpanel by Numerator for the 52-week period ending 15 June 2025. However, this growth story continues to be impacted by price increases, shifting consumer behaviours and economic factors.

While the frequency of seafood purchases and the volume purchased by shoppers per trip have declined there is positivity in seeing more shoppers entering the category. However, the driving force behind the sales boost continues to be driven by a rise in average prices per kilogram.

The price factor: Steady growth amidst slower increases

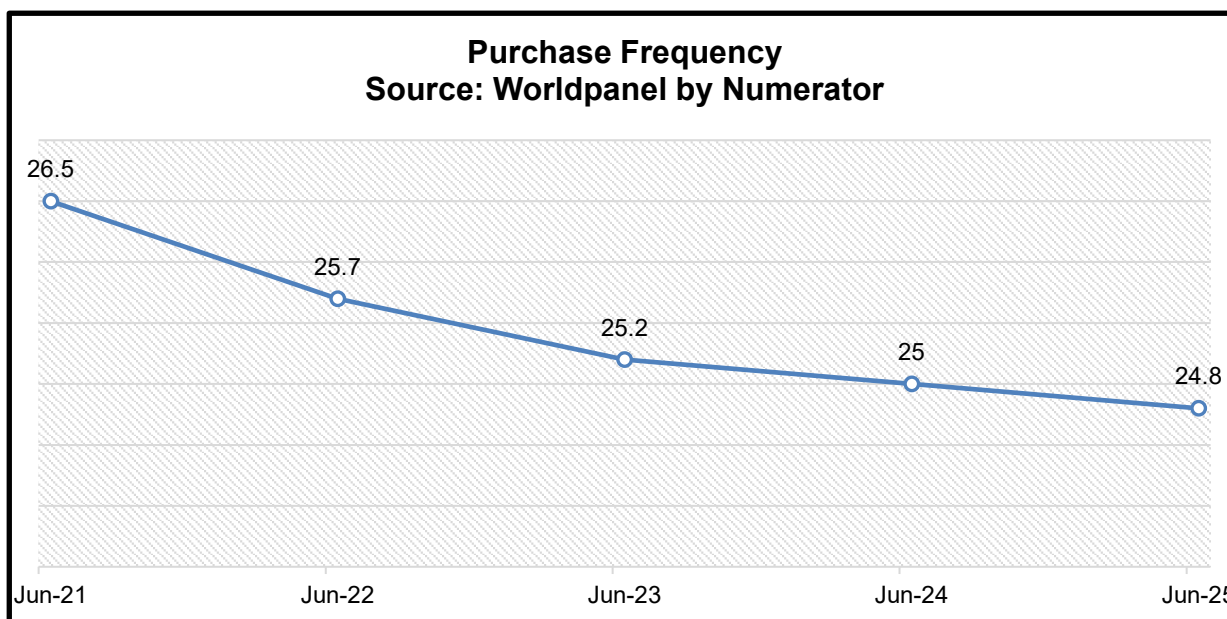
As previously reported, price increases have been a significant driver in the seafood category over the past several years, with average prices rising by 20% since 2021. While the pace of these increases has moderated—evidenced by a 1.8% rise in June 2025—the effects are increasingly evident in the changing purchasing behaviours of Irish seafood consumers.



Changing shopping habits: Less frequent purchases

Purchase frequency, defined as the number of times Irish consumers buy seafood annually is also in decline. In June 2025, Irish households purchased seafood an average of 24.8 times per year, down from 26.5 times in June 2021—a decrease of 6.8%. This reduction reflects a shift in consumer behaviour toward less frequent purchases, contributing to an overall volume decline of 8.6% since June 2021.





Online seafood sales growing ahead of total grocery

Over the year to June 2025, online sales of seafood increased by 15.3%, growing ahead of the total grocery online sales. Despite a decrease in the number of shoppers buying seafood online, those who did purchased it more often and bought more volume per online trip. Both fresh and frozen seafood have seen strong growth in the online space, showing that digital shopping is becoming a more important part of the seafood market.

Category breakdown: Fresh, frozen, and loose seafood

In terms of categories, fresh prepacked seafood remains the dominant force, making up 61.8% of total seafood sales. Frozen seafood follows closely, holding a 29.6% share of the market, while loose seafood accounts for 8.6%. Fresh prepacked and frozen seafood experienced sales growth of 4.9% and 2.1% respectively with fresh loose seafood continuing to see a decline in sales. Interestingly, fresh prepacked seafood was the only category to see an increase in the number of shoppers buying into the category.

Among the fresh prepacked category, Salmon remains the undisputed favourite, with a commanding 62.8% of sales. Warm Water Prawns hold the 2nd highest share of sales at 8% overtaking Cod in the last number of years. Salmon is the most frequently purchased species, highlighting its popularity among Irish shoppers. For frozen seafood, Cod, Alaskan Pollock, and Haddock top the list, with Warm Water Prawns also increasing share in this category.

Source: Data/figures/information supplied by Worldpanel by Numerator for the 52-week ending period 15 June 2025



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A growing global species in uncertain times: Shrimp

Irish Retail sales data indicates a growing popularity of prawns—both cold-water and warm-water varieties—among Irish consumers, with respective market shares of 2.4% and 8.1%.

According to estimates by Kontali, global shrimp production reached approximately 9.8 million tonnes in 2024, with farmed shrimp accounting for 66% of this total. Key shrimp-producing nations—India, Indonesia, Vietnam, and Ecuador—are currently facing uncertainty due to the potential implementation of U.S. tariffs, posing significant challenges across the supply chain from producers to end consumers.

While the U.S. remains a vital market for shrimp exporters, suppliers are increasingly turning their focus to alternative markets. The European Union, in particular, is viewed as a stable and growing market, supported by rising consumer demand. However, producers continue to face mounting difficulties in sustaining farming operations amid escalating production costs and tightening profit margins. Disruptions at the production level are likely to have ripple effects on global shrimp supply.

In summary

The Irish retail seafood market continues to grow modestly, largely driven by rising prices rather than increased consumer demand. Despite declining purchase frequency and volume, the sector is seeing shifts in consumer behaviour, including greater engagement with online channels and growing interest in fresh prepacked seafood, especially salmon. These trends highlight both challenges and opportunities for the industry, with pricing, convenience, and product preference playing key roles in shaping future growth.



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