

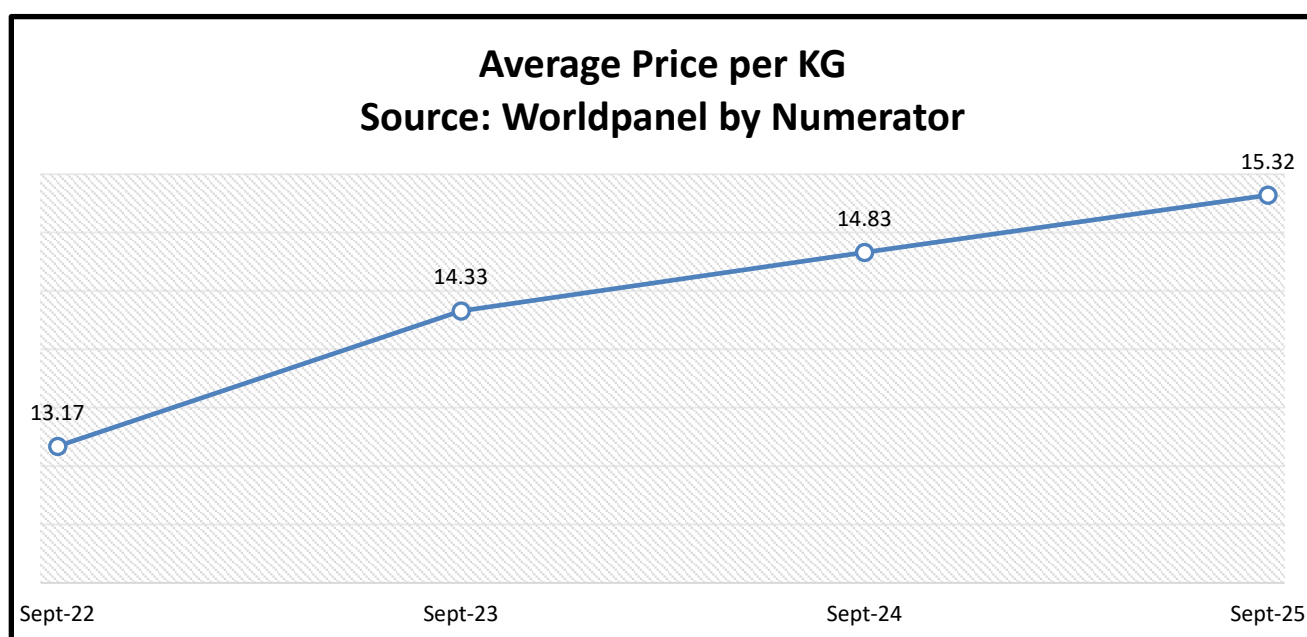
A snapshot of evolving Irish retail seafood market in 2025

The Irish retail seafood market witnessed continued growth in sales, with a 3.9% increase year on year, in sales according to data from Worldpanel by Numerator for the 52-week period ending 7 September 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 with 93.6% of shoppers purchasing seafood. The positivity in seeing new shoppers enter the category must be followed up with converting them to purchase seafood in larger quantities and more often in store. The continued rise in average prices per kilogram is however still the driving force behind the growth of sales values.

The price factor: steady growth amidst slower increases

Grocery price inflation stood at 6.3% in the 12-week period up from 5.4% the previous 12 weeks. As previously reported, price increases have been a significant driver in the seafood category with average seafood price per kg rising by 8.3% in this 12-week period. The rise of grocery price inflation and increased prices of other key proteins will have an impact on the purchasing behaviours of Irish seafood consumers.



Changing shopping habits: demographic changes

Over the last five years the 'Retired' demographic have increased their share of spend across fresh prepacked from 18.9% share in 2021 to 22.1% share in 2025. Within frozen seafood this share has increased further from 16.6% share in 2021 to 21.2% share in 2025. This demographic spends the most on loose seafood and was the demographic which increased its spend most last year.

On the other hand, the 'Pre-Family' demographic have increased their share of spend across fresh prepacked from 15% share in 2021 to 17.3% share in 2025. Within frozen seafood this share has increased from 12.7% share in 2021 to 13% share in 2025. This demographic spends the most on chilled prepacked seafood and was the demographic which increased its spend second highest last year.

Middle families are a key demographic for growth within the frozen sector as they have decreased their spend the most.

Online seafood sales growing ahead of total grocery

Over the year to September 2025, online sales of seafood increased by 6.9%. 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 62.1% of total seafood sales. Frozen seafood follows closely, holding a 29% share of the market, while loose seafood accounts for 8.9%. Fresh prepacked and frozen seafood experienced sales growth of 7.8% and 0.7% respectively with fresh loose seafood continuing to see a decline in sales. Interestingly, fresh loose seafood performed the strongest over the 12-week period with sales growth of 27.7% having attracted new shoppers to buy into the category. Fresh prepacked also attracted new shoppers into the category in the period whilst frozen saw declines in the number of shoppers.

Among the fresh prepacked category, Salmon remains the undisputed favourite, with a commanding 63.2% of sales. Warm Water Prawns hold the second highest share of sales at 7.8% 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.



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Product type performance: chilled prepacked and frozen

Within chilled prepacked fish, convenience products have performed strongest such as ready meals, smoked fish and fish prepared with a flavour or marinade. Sushi has also seen strong growth and this is apparent in the increased presence and availability of sushi across the retailers. Within shellfish it is the ready to eat products which perform strongest, those with sauce and natural cooked products.

Scratch cooking is also evidenced in the data with raw natural fish and shellfish products performing well in the period.

Within frozen, coated, fish fingers and natural are the dominant categories accounting for approximately 90% of spend. Coated was the only of these to see slight decline in spend with fish fingers performing the strongest.

Source: Data/figures/information supplied by Worldpanel by Numerator for the 52-week ending period 7 September 2025

Summary

The Irish retail seafood market continues to grow modestly, largely driven by rising prices. Despite declining purchase frequency and volume, the sector is seeing shifts in consumer behaviour. The retired category performs the strongest amongst all demographics but there is opportunity to convert family demographics to the seafood category. Convenience is key but there will be challenges and opportunities for the industry ahead with pricing and availability of seafood playing key roles in growing the market in Ireland.



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