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Fish and Chips in Foodservice

This Market Insight factsheet provides a full picture of fish and chips in the Great Britain (GB) foodservice market.

25/11/2024 Suzi Pegg-Darlison (15-minute read)

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Factsheet overview

This Market Insight factsheet provides a full picture of fish and chips in the Great Britain (GB) foodservice market using year ending data to September 2024.

Consumer preferences are constantly changing with various factors playing a role in their purchasing decisions. Understanding this and having insights into the seafood market and its role in the foodservice sector also known as out of home, can help to run a successful seafood business.

This factsheet provides the latest seafood data and insights in the GB foodservice market. Current trends in the industry and the seafood market will be presented, but the aim of this factsheet is to focus on fish and chips as a meal.

Top takeaways

There were 36.6 million less fish and chips meal servings served in the last year, down 21%. Fish and chips servings are struggling across all six channels particularly in Fish and Chip Shops where 60% of the servings were lost.

- Fish and chips are the most popular British dish.
- Increases in food prices and running costs affecting Fish and Chips affordability.
- Fish and chips have had the steepest price rise of all British takeaways.
- 1 in 5 Brits choose fish and chips as their favourite takeaway.
- Ranked Britain’s second favourite takeaway behind Chinese.
- Socialising is the main motivation for consumers choosing fish and chips out of home.

Trends in the GB foodservice market

The cost-of-living crisis continues to impact the market, with consumer confidence, stable across summer, dropping once more as we move into autumn. Although food price inflation slowed, hospitality inflation remained higher than average affecting the affordability of purchases out of home.

Consumers are spending more out of home but visiting less.

The foodservice market continued to see declines in the last 12 months with servings of and visits to, total food and drink, down 0.9% and 3% respectively. Sales were up 12% but this was price driven.

Travel/Leisure and Workplace/Education the only channels seeing growth.

Apart from Fish and Chip Shops, all channels experienced increases in yearly consumer spend. However, it was only Travel and Leisure and Workplace and Education that experienced growth in servings and visits, continuing to benefit from consumers returning to pre-pandemic patterns, with most leading chains recording a drop in traffic or only modest growth. Fish and Chip Shops continue to see the largest declines.

The stable consumer confidence during summer has dropped.

The United Kingdom (UK) Gross Domestic Product (GDP) grew 0.7% in quarter 2 2024 versus the same period a year ago. With that, consumer confidence was a stable -13 points in July to August, but this fell to -20 in September 2024. However, the Consumer Prices Index (CPI) improved to below the government and the Bank of England target of 2.0%.

Food inflation slowed but high running costs affecting affordability.

Food price inflation slowed down to an average +1.6% versus a year ago with utility costs also dropping 1.6%. However, hospitality inflation of 4.4% in quarter 3 2024, remained significantly higher than average, affecting affordability of restaurants and other out of home establishments.

Consumers switching from in-store to drive thru visits.

Drive-thru and delivery traffic showed growth in visits whilst all other service channels, eat-in and takeaway, registered a decline. As consumers are predominately drawn to the total food and drink market by convenience needs, we could expect this trend to continue.

Consumers snacking more and swapping dinner out for breakfast.

Dinner saw the biggest decline in traffic, down 9%, with lunch losing 4%. As more people continued to return to working from their offices the “At Work” occasion grew 3%, affecting the breakfast and snacking dayparts up 1% and 2% respectively.

Families returning to foodservice.

Quarter 3 2024 saw families returning to foodservice with visits with children aged up to 15 years old growing 5%. Non-family visits continued to decline, losing 6% versus a year ago.

Seafood in foodservice

Consumers purchase one third of the volume sales of total seafood in the foodservice market, with 4% of all food and drink servings being to seafood.

The foodservice market allows consumers to try new flavours and species.

Restaurants and other out of home establishments provide a unique environment to consumers. They can try new and trending foods and cuisines and be in a convenient place to establish and maintain their social connections. For seafood, it also allows consumers to try new species and flavours that they might not otherwise try at home. This makes foodservice trends a valuable indicator for retail opportunities.

With over one third of all the volume sales of seafood purchased out of home and 4% of all food and drink servings out of home being seafood, it's an important market for the industry.

Seafood continues to recover ahead of the total market.

GB consumers ate an estimated 144,435 tonnes* of seafood out of home worth £6.2 billion in the 12 months to September 2024. Seafood has continued to recover ahead of a declining total foodservice market with total visits to out of home for seafood up 0.8% and total seafood servings, being how many portions of a product were sold, up 6%. Seafood spend has grown 24%, but as with the total market this is predominately price driven.

**Tonnes is an estimation calculated by the total number of servings sold multiplied by 140g and divided by 1000, the recommended serving size of seafood.*

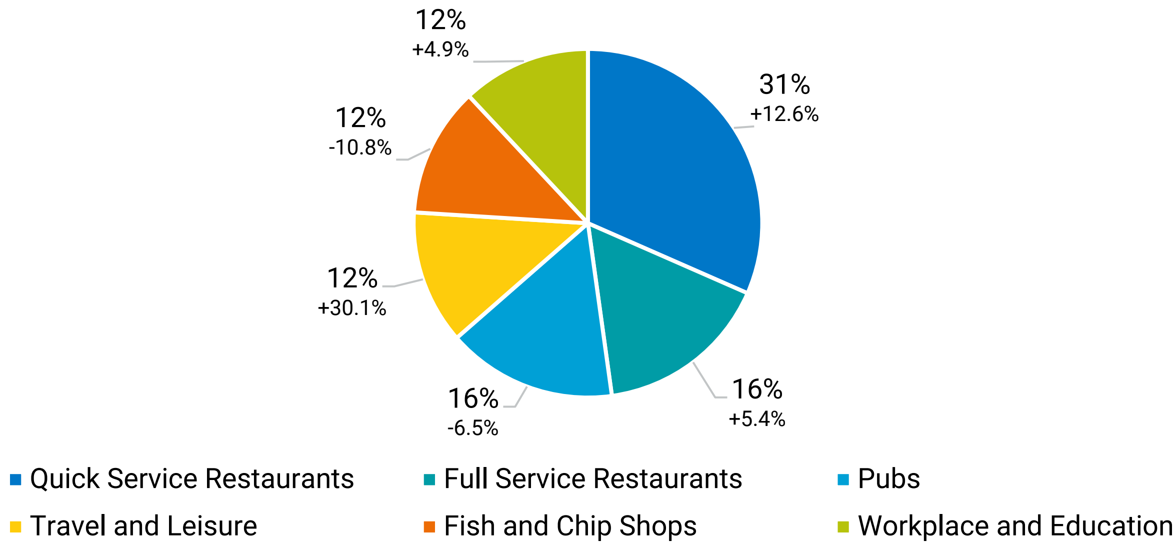
Strongest seafood servings growth from Travel and Leisure.

Seafood is sold in six different channels that make up the total foodservice market. These are quick-service restaurants; Fish and Chip Shops; Pubs; Full Service Restaurants; Travel and Leisure; and Workplace and Education. To September 2024, the following amounts of seafood was consumed in each channel, including 12-month servings growth.

1. Quick Service Restaurants: 45,414 tonnes (+13%)
2. Pubs: 22,678 tonnes (-7%)
3. Full-Service Restaurants: 23,327 tonnes (+5%)
4. Fish and Chip Shops: 17,306 tonnes (-11%)
5. Workplace and Education: 17,211 tonnes (+5%)
6. Travel and Leisure: 17,875 tonnes (+30%)

Quick Service Restaurants continue to be the largest market channel for seafood. Chart 1 below illustrates the seafood servings share of each channel with 12-month servings growth.

Chart 1. Servings share of total seafood by GB foodservice channel with servings growth (%) to 12 months end September 2023.



Fish and Chips in foodservice

Fish and chips experienced strong declines in the 12 months to September 2024 with 36.6 million less fish and chips servings sold in the year. This decline has been seen across all six channels with most of the losses, over 60%, coming from Fish and Chip Shops.

14% of all seafood out of home is from fish and chips.

Fish and chips are a popular way for consumers to enjoy seafood, with fish and chips served as a meal representing 14% of all the seafood servings consumed in foodservice.

36.6 million less servings of fish and chips in the last year.

140 million servings of fish and chips were sold in the 12 months to September 2024, a 21% decrease when compared to year end September 2023. The decrease accounted for 36.6 million less servings of fish and chips over the course of the year. Over 60% of which came from Fish and Chip Shops.

Fish and chips have had the steepest price rise of all UK's takeaways.

The main driver of fish and chips poor performance in the last year are the declines in dinner -34%, families -25%, and eat in visits -28%. These declines could be attributed to the increases in the price of fish and chips, up 12% versus last year. For comparison, servings of pizza were up 5% with price increases of 0%.

Fish and chips is struggling to compete against other more unaffordable out of home options. The average price for a portion of fish and chips has risen by more than 50% to nearly £10 in the five years to July 2024. It has risen in price more than any other

UK takeaway options, ahead of kebabs (44%), chicken and chips (42%), pizza (30%), Indian (29%) and Chinese (29%).

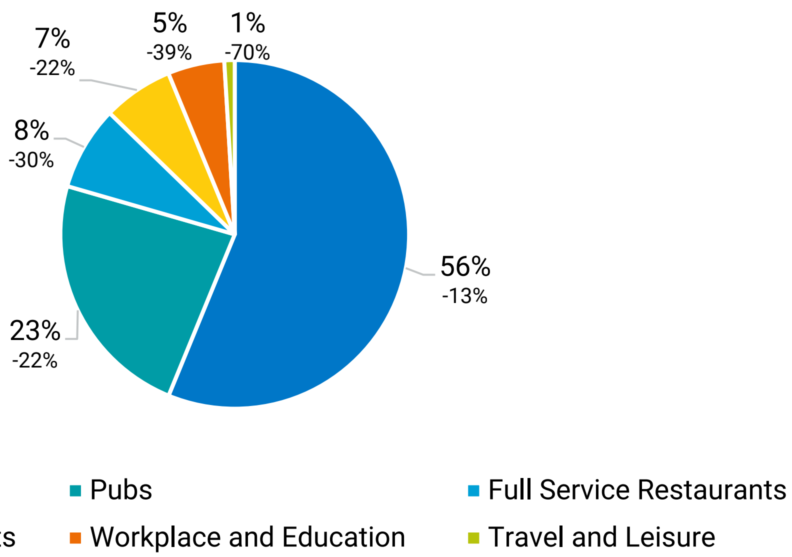
Families remain the most affected by the increases in price as they have the largest average cheque when eating out of home.

The decline in dinner visits is affecting the total market down 9% and is therefore having a knock-on effect on fish and chips, with dinner the most important daypart. Over 48% of all fish and chips servings being at dinner. This is also amplified for Fish and Chip Shops where servings at dinner dominate at 70%. This decline is due to consumers cutting out on non-essential purchases, like eating out at dinner time, usually the most expensive daypart. This is highlighted in consumers switching to cheaper dayparts with increases at breakfast 1% and snacking 2%.

Where are fish and chips purchased?

Over half of all fish and chips servings out of home are from Fish and Chip Shops. As with total seafood, fish and chips are enjoyed in six different channels.

Chart 2. Servings share of fish and chips by GB foodservice channel with servings growth (%) to year ending September 2024.



During the year, decreases in fish and chip servings were seen across all six channels. Although the biggest declines were seen in Travel and Leisure, the large share in Fish and Chip Shops means that the declines here have hit fish and chips the hardest, with 60% (12 million) of the total servings lost (36 million) being to this channel alone.

Who is the fish and chips consumer?

Fish and chips are most popular amongst older generations.

61% of all fish and chip servings are to consumers over 50 years old.

Mirroring the total seafood consumer, fish and chips are most popular with the older generations. However, it over indexes in the over 50s compared to total food and drink servings where just 25% are from the over 50s and total seafood servings where 34% of servings are from the over 50s.

This skew is more apparent in Pubs where over 77% of all fish and chips servings are to the over 50s.

Conversely, consumers under 50 represent 75% of the total food and drink servings out of home whereas only 39% of the servings of total fish and chips are to the under 50s.

65% of fish and chip servings are to a more affluent consumer.

In contrast to the age of the fish and chip consumer, servings of fish and chips slightly under index with the more affluent consumer compared to total food and drink, where 70% of all servings are to the A, B and C1 consumer and to total seafood servings where 72% of servings are to a more affluent consumer, this is compared to 65% of the fish and chip consumer.

However, the more affluent consumer dominates fish and chips servings in Pubs and Full Service Restaurant with over two-thirds of all fish and chip servings out of home to them. This is especially so in Pubs where 75% of fish and chip servings are to the A, B and C1 consumer.

C2, D and E consumers purchase the most servings of fish and chips in Quick Service Restaurants and Fish and Chip Shops, but at just under a half of all servings, the affluent consumer still dominates.

Fish and Chips is strongly skewed to female consumers.

Over half of all the fish and chip servings out of home are to women. This is across all the foodservice channels. This skew contrasts with total out of home and total seafood where men dominate in servings, 55% and 53% respectively.

This gender skew is particularly apparent in Pubs where 66% of all fish and chips servings are to women.

76% of fish and chip servings are to adults without children.

Fish and chips perform better with the adult only occasion. This is amplified in Pubs where over 86% are to the adult only occasions. Although in Quick Service Restaurants, parties with children account for 49% of servings. This is more than total food and drink where just 33% and total seafood where 67% of servings are to parties with children.

When are fish and chips consumed?

Dinner on Fridays and Saturdays remains the most popular time for fish and chips purchases.

Fish and chips are most popular on Fridays and Saturdays.

Fridays have once again been the most popular day for fish and chips with Saturdays now a close second, where a combined 43% of all fish and chip servings occur. This over indexes with total food and drink where 31% of the servings occur and total seafood where 34% of the servings occur.

This skew is particularly apparent in Fish and Chip Shops where 46% of all its fish and chips servings take place. This is predominately from Saturdays where 26% of servings are purchased.

There is an opportunity for total fish and chips on Mondays, Tuesdays, and Sundays as they under index with total food and drink and total seafood servings.

48% of fish and chips servings are consumed at dinner.

Dinner remains the most popular time of day for fish and chips with 48% of all servings being at dinner. This largely over indexes to total food and drink and total seafood where just 29% and 36% of servings are at dinner. This is more apparent for Fish and Chip Shops where 71% of servings are at dinner time.

More instances of servings at dinner in Quick Service Restaurants, at 51%, but they are more popular at lunchtime in Pubs and Full Service Restaurants where 71% and 63% of all servings are at lunch.

A key opportunity for fish and chips is the breakfast and snacking daypart, as they strongly under index compared to total food and drink servings; 6% of fish and chips servings in these dayparts verses 39% of total food and drink servings, and 26% of total seafood servings. Workplace breakfasts and treats could be a key target area.

Choosing fish and chips

Fish and chips remain a popular British staple meal.

Fish and chips are the most popular British dish.

Fish and chips have taken the number one spot for the most popular British dish. Its popularity has increased compared to quarter 3 2023 where it was second spot. They also take the top spot for the most famous dish with 100% of respondents knowing of the dish, according to a study by You Gov.

In terms of popularity, it beats some of the nation’s favourite dishes including roast chicken, English breakfast, soup, beans on toast, roast beef and bangers and mash. They are most popular with men and Baby Boomers.

1 in 5 Brits choose fish and chips as their favourite takeaway.

Fish and chips were ranked Britain’s second favourite takeaway, with around 1 in 5 Brits choosing the meal, beating Indian, Pizza, and Kebabs. Chinese took the number one spot with 1 in 4 Brits choosing it as their favourite takeaway.

When broken down by age, there were clear generational differences. Pizza was the most popular choice for those aged 18 to 34 year olds, Chinese the favourite among 35 to 54 year olds, and Fish and Chips favoured by those aged 55 and over. This came from a Best for Britian jumbo poll of over 15,000 adults during March 2024.

Socialising is the main motivation for consumers choosing fish and chips.

The main motivation for consumers eating fish and chips out of home is for socialising, with 45% of all servings being driven by this need. In comparison, just 35% of total food and drink servings and 39% of total seafood servings are for socialising. The total food and drink consumer is largely driven to purchases out of home by convenience needs and the seafood consumer also being driven by socialising to a lesser extent, with convenience also being an important need.

The socialising motivation for fish and chips is particularly apparent in on-premise channels such as Pubs and Full Service Restaurants with 74% and 51% of servings respectively. The main motivation in Fish and Chip Shops and Quick Service Restaurants is functional needs where over 40% of all servings take place.

Fish and Chip Shops

Over half of fish and chips servings out of home is at Fish and Chip Shops.

Spoilt for choice.

There are approximately 10,500 fish and chip shops in the UK. This is more than the top nine most popular dining brands of quarter 3 2024 which include Gregg’s, Wetherspoons, Pizza Express, KFC, McDonalds, Pizza Hut, Burger King, Krispy Kreme, Domino’s Pizza, and Nando’s. Combined their outlets total around 8,606.

Increases in food prices and running costs affecting Fish and Chips affordability.

Both visits and servings of total food and drink in Fish and Chip Shops have declined by 21% and 18% respectively, in the past year to September 2024. Fish and Chip Shops have the smallest total out of home servings share of all the channels at just 2%.

Mirroring total food and drink, seafood visits and servings to Fish and Chip Shops have declined by 14% and 11% respectively in the last 12 months. Increases in food prices, fish, potato, and oil specifically, are believed to be a factor in the declines, along with increasing running costs, including soaring energy bills, tariffs on seafood imports and extreme weather hammering potato harvests, are all impacting performance.

However, they remain a very important channel for seafood consumption out of home with 72% of the protein sold in Fish and Chip Shops being seafood and 12% of all seafood servings out of home purchased in Fish and Chip Shops.

Cod remains the most popular species in Fish and Chip Shops.
63.8% of all seafood servings in Fish and Chip Shops are to Cod which has slightly dropped in share over the last year to September 2024 down 0.2 percentage points (PP). Cod servings have also declined by 11%.

The second most popular species Haddock with 23.4% of seafood servings share, has gained share up 4.7pp some of which has come from shellfish down 0.6 percentage points and crabcake/fishcake down 1.0pp since last year. Haddock has also seen a growth in servings up 12% on last year.

Fried Fish is the largest product group for Fish and Chip Shops and therefore the biggest contributor to its decline with servings down 8% on last year.

Opportunities for fish and chips

A key opportunity for fish and chips is to expand its consumer base, target differing dayparts, and socialising. Offering value for money remains critical.

- Offer consumers good value for money.
- Target a younger and less affluent consumer.
- Make fish and chips a consumer choice, every day of the week.
- Offer consumers new and different options.
- Mono-products platforms remain popular.
- Offering delivery and app-based ordering.
- Make sure a digital (app-based) loyalty scheme is in place.

Offer consumers good value for money.
The importance of affordability will remain. Fish and Chips offer a delicious and filling meal that isn’t heavily processed but it’s crucial it offers consumers value for money as this remains a key component to purchase.

Target a younger and less affluent consumer.
Like total seafood, fish and chips should engage more with the younger consumer as they bounce back to pre-pandemic behaviour faster than older generations. As it tends to attract older and more affluent consumers it could benefit from appealing to younger and less affluent consumers and to adults with children as there is an opportunity to increase fish and chip servings to families.

Seafood can appeal to a younger and less affluent consumer by building on a unique foundation of enjoyment, highlighting health and quality credentials (better living) whilst educating about the different types of species available (choice and convenience).

Make fish and chips a consumer choice, every day of the week.

Fish and chips are the most popular British dish, but most servings are purchased on Fridays and Saturdays. There is an opportunity to increase servings by making the dish relevant all week, particularly on Mondays and Sundays.

Offer consumers new and different options.

Quick, portable, and cheap snacking and breakfast options are key opportunities for fish and chips as its currently under-indexing compared with the total market. Quick value, on-the go occasions will also be instrumental in growing the market post pandemic.

Mono-products platforms remain popular.

A challenge for Fish and Chip Shops is that their mono-product platform limits customer base development. However, several shops have started to diversify widen their menu to include kebabs, hot dogs and curries which looks like it could be a viable solution.

Offering delivery and app-based ordering.

It's important to keep an eye on delivery, although growth opportunities are now limited, the service is here to stay and offers consumers convenience. Additionally, app-based ordering has become ubiquitous for multiple channels order points: delivery, pick-up and at-the-table.

Make sure a digital (app-based) loyalty scheme is in place.

In foodservice, loyalty has always been a key driver of success and it is expected to remain an important factor for people when choosing where they will eat out, with the pandemic elevating this further. To build customer loyalty, consumers need to trust an establishment. Trust has been the main priority for consumers when choosing a place to go during the pandemic. This is particularly important as the consumer looks to cut costs, with deals offered directly to the consumer via loyalty platforms.

Sources

Data sources: (%) values represent changes from the previous year unless otherwise stated.

Resources used in the production of this factsheet can be viewed below.

Circana Foodservice data:
- Panel based data to year ending September 2024.

Additional data and insights used to produce this factsheet:
- Best for Britain, May 2024, British classic battered as Chinese revealed as the nation's favourite takeaway, Webpage
- BBC, August 2024, Fish and chips price rise tops UK takeaways, Webpage
- Euro News, August 2024, Is fish and chips too expensive for Brits?, Webpage
- You Gov, Q3 2024, The Most Popular British Dishes, Webpage
- You Gov, Q3 2024, The Most Popular Dining Brands, Webpage
- Circana, September 2024, year ending September Fish and Chips Report, Report
- Circana, September 2024, 2024 Q3 Quarterly Report, Report
- Circana, September 2024, Q3 2024 Datasheet, Report
- NFFF, 2024, Everything you need to know about fish and chips, Webpage

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