



UK Crab Market: Wholesale & Retail Perspective

An Bord Iascaigh Mhara

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Overview

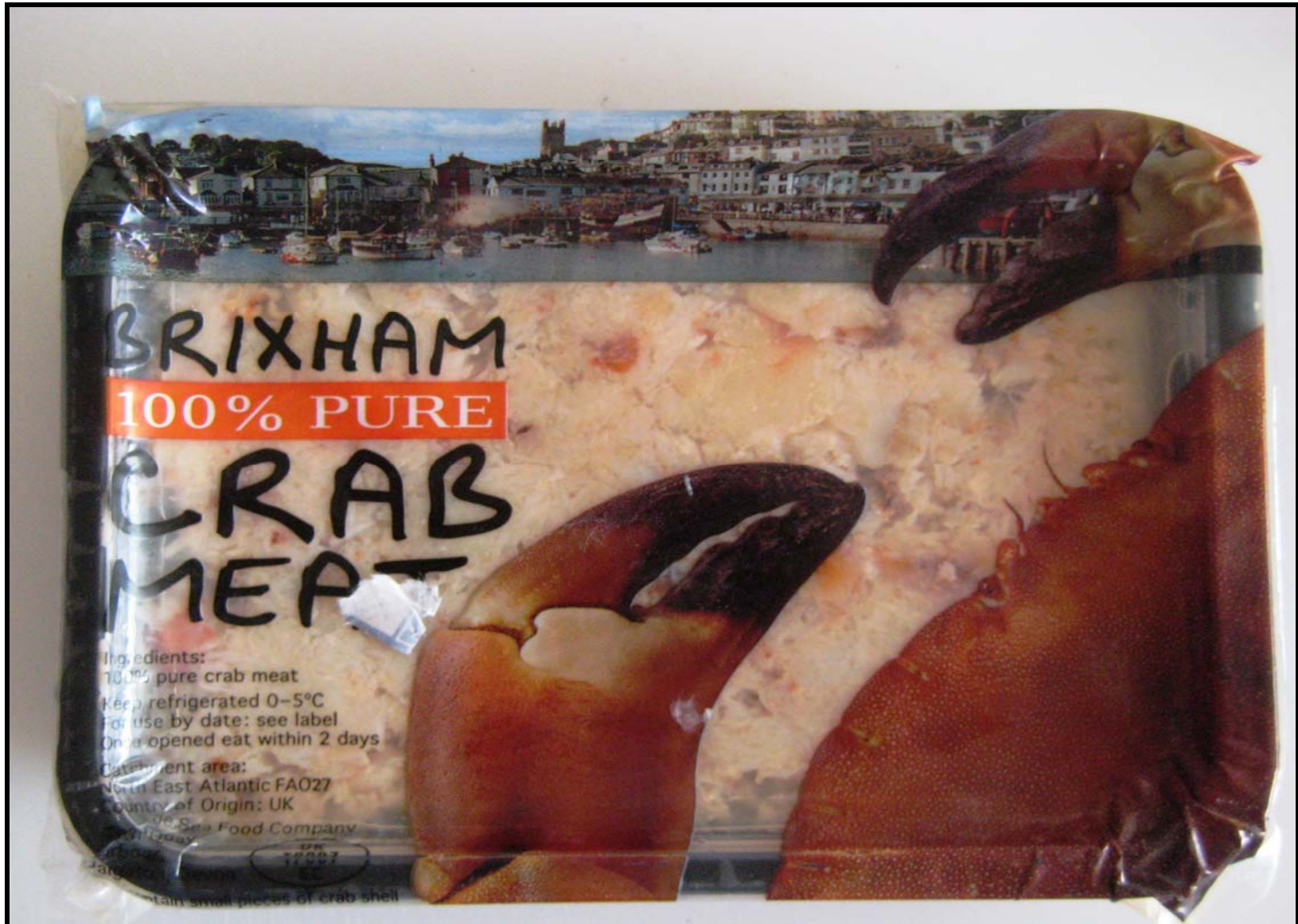
- Research Study took place 7th April 2010 in London
- Included Billingsgate Market, Asda, Morrisons, Tesco, Sainsburys, M&S, Wholefoods and Waitrose.

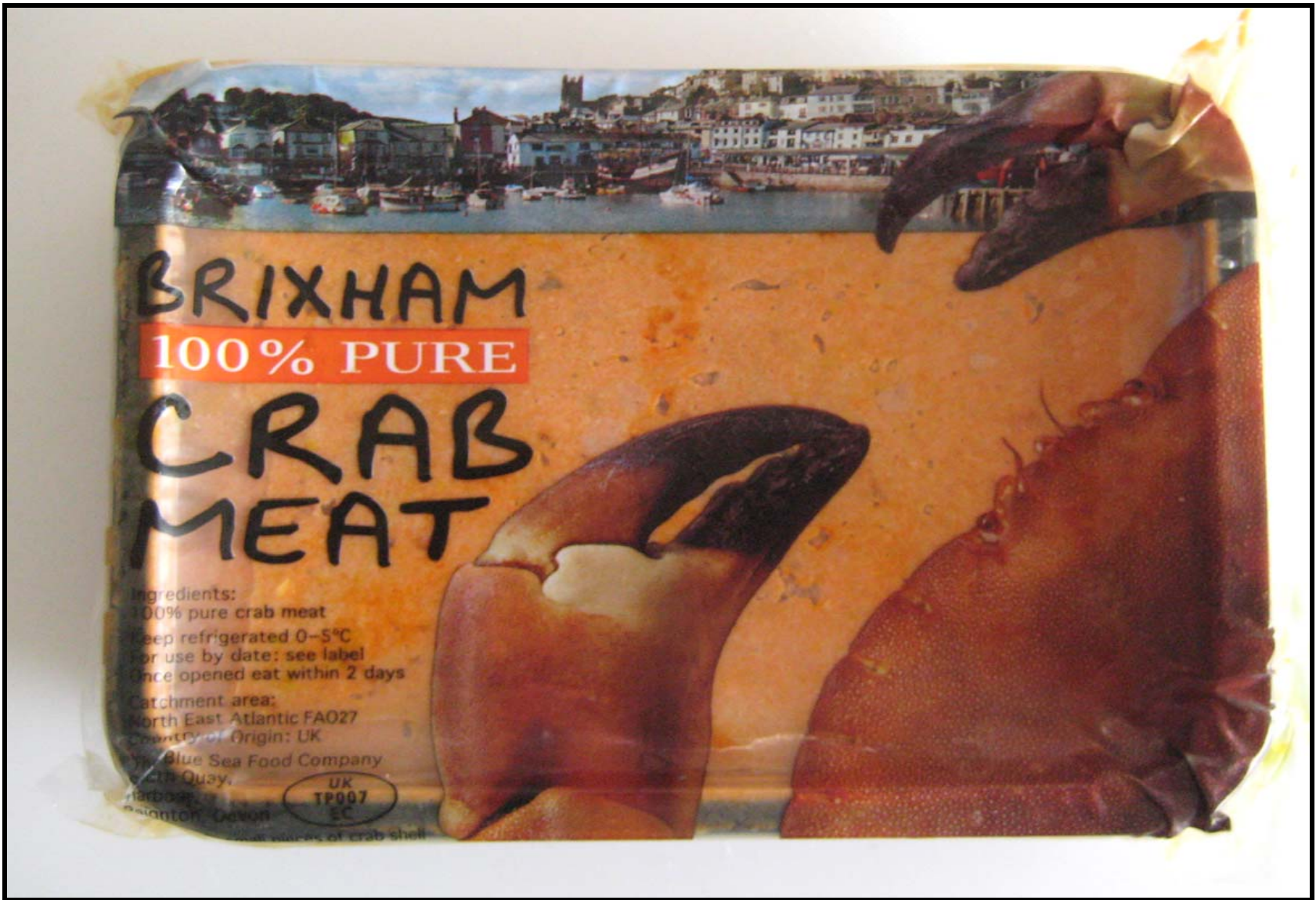
Products – Billingsgate

Billingsgate Market

Wholesaler / Fishmonger	Product	Size	Price per unit	Price per kg
Simmos	Browne crab meat – Brixham	454g	3.00	6.60
Simmos	Crab Pate	150g	3.00	6.60
Barton & Hart	White Crab Meat - Brixham	454g	10.00	22.02
Seahawk	50 / 50 crab meat - Frozen	454g	4.00	8.80
Seahawk	Crab claw single pincer - frozen	454g	6.50	14.31
LG Wicker	1 dressed Crab	small	2.50	NA
LG Wicker	50 / 50 crab meat	454g	7.00	15.41
Not Confirmed	Whole brown crab - uncooked	Each	3.30	NA







£3.00 / 454g – Chilled



£7.00 / 454g
Chilled

BI



www.bimb2b.com



FISHERMENS SOCIETY LTD
KILCOMNESS, ORKNEY 01856850375
Sustainable Caught in Area FAO027 (NE Atlantic)

Crab Meat
STANDARD
450gm

Store below 0 Deg C. Defrost thoroughly before use,
and consume between 2-4 Deg C and consume
within 2 days.

Freeze Date: 30.11.09 Best Before: 30.05.11

£ 4.00 / 454g
Frozen



www.bimb2b.com



Crab Claws
£6.50 / 454g
Frozen



Blue Seafood Company / www.devoncrab.com
150gr / £3.00
Chilled





£2.50 - Chilled

Products – Retail

Retail

High Street Retail Stores	Product	Size	Price per unit	Price per kg
James Knight of Mayfair (Fishmonger)	White Crab Meat - Fresh, not pasturised	per kilo	78.00	78.00
Tesco	Full frozen Brown Crab	400gr	5.00	12.50
Tesco	Dressed Cromer Crab	100gr	3.00	30.00
Sainsburys	Dressed Crab	150gr	3.99	26.59
Whole Foods	White Crab Meat	250gr	14.99	59.96
Whole Foods	White Crab Meat - on counter	100g	3.99	39.90
Whole Foods	Brown Crab Meat	250gr	9.99	36.90
Whole Foods	Crab Cakes - Frozen	230gr	7.99	34.73



Retail

Morrisons	Philips Crab Meat - Tub	140gr	3.49	24.92
Waitrose	Crab Pate	113gr	1.39	12.30
Waitrose	Brown Crab Meat - Cornish	100gr	2.49	24.90
Waitrose	White Crab Meat - Cornish	100gr	4.99	49.90
Marks and Spencer's	Layered Crab	200gr	3.49	17.45
Marks and Spencer's	White Orkney Crab Meat	100g	4.49	44.90
Marks and Spencer's	Dressed Orkney Crab	125g	5.99	47.92
Marks and Spencer's	Dressed Cromer Crab	150g	4.99	33.26





Waitrose
£4.99 / 100gr



Waitrose
£2.49 / 100gr



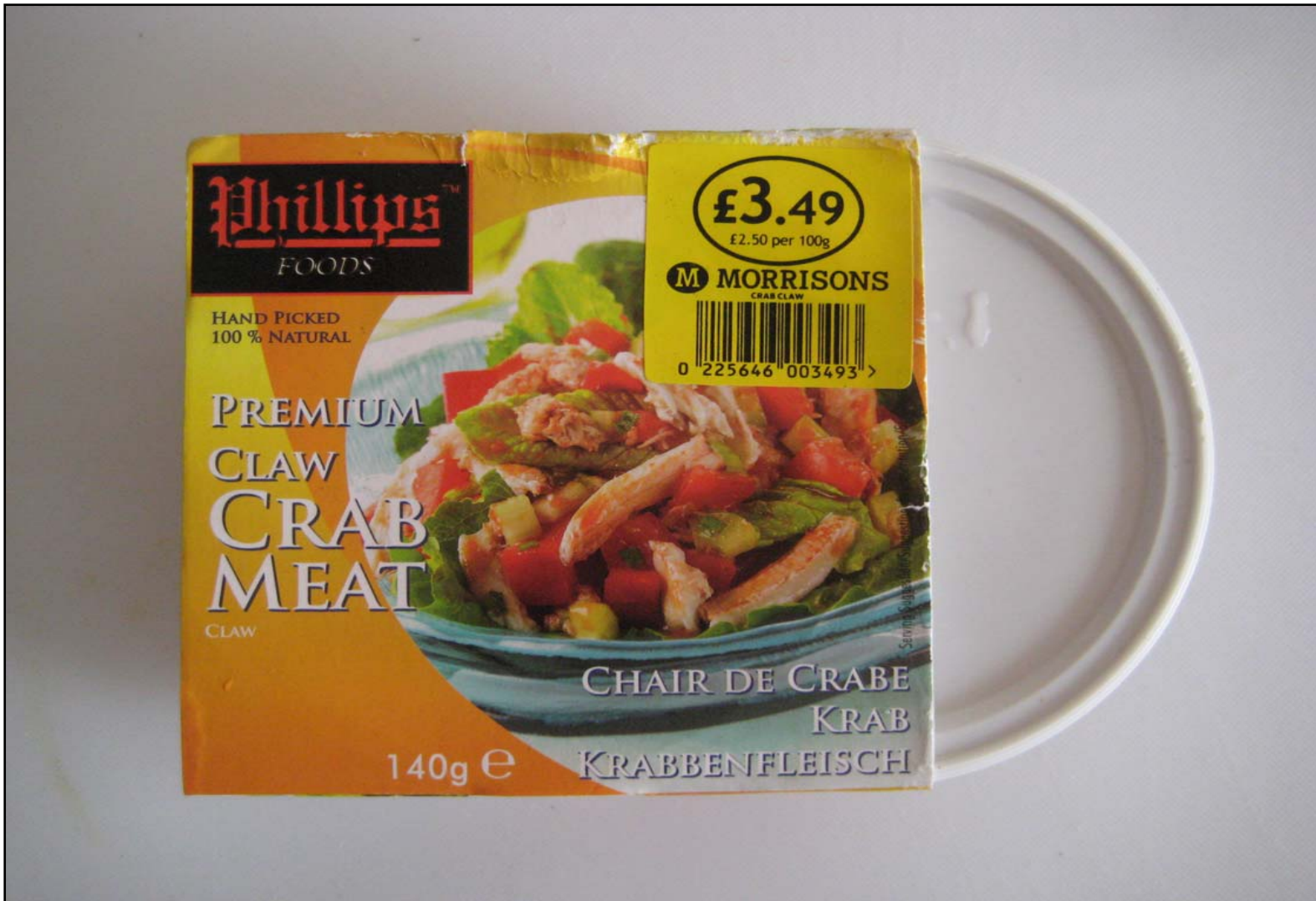
Waitrose
£1.39 / 113g



Sainsbury's
£3.99 / 150gr



Tesco
£3.00 / 100gr



Morrisons £3.49

140g

BIM Business Research & Intelligence



www.bimb2b.com



Wholefoods

€14.99 / 250gr

BIM Business Research & Intelligence



www.bimb2b.com



Wholefoods
£9.99 / 250gr



Wholefoods
£7.00 / 230gr
Frozen

Thai Flavoured – also available in 2 other flavours.

Conclusion

- The crab market at both a wholesale and retail level has remained unchanged over the last 18 months.
- Wholesale – Billingsgate offering whole crab, white meat, brown meat. 50/50, in both chilled and frozen formats.
- Few examples of low priced, unappealing looking frozen meat in Billingsgate (Not pictured, for sale at British Seafoods).
- Retail - Premium prices are being charged for Fresh white meat in James Knight of Mayfair.



Conclusion

- M&S price range with the exception of some price movement, has not fluctuated much over the last 18
- With the exception of the frozen crab cakes there does not appear to be much new product development in the crab market.
- TNS 2009 – Retail value of UK Crab market is £17.8 million, average price per kg - £6.65, with 10% market penetration.