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


UK Seafood Supply Chain Overview: January-March 2023

Edited by: Ana Witteveen and Jennifer Robson

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Introduction

This report takes a high-level view of the whole of the UK seafood supply chain to explore factors impacting UK seafood markets, seafood business operations and consumer behaviour during January to March 2023.

In the UK, we export a large proportion of the seafood we catch and import much of the seafood we eat. Our seafood supply chain is heavily integrated into the global seafood supply chain. Therefore, both local and global changes have consequences for the UK's seafood supply chain.

We have drawn on qualitative and quantitative data available at the time of writing. This includes official statistics and industry insights. Links to data sources and other resources are provided at the end for further information.

Acknowledgements

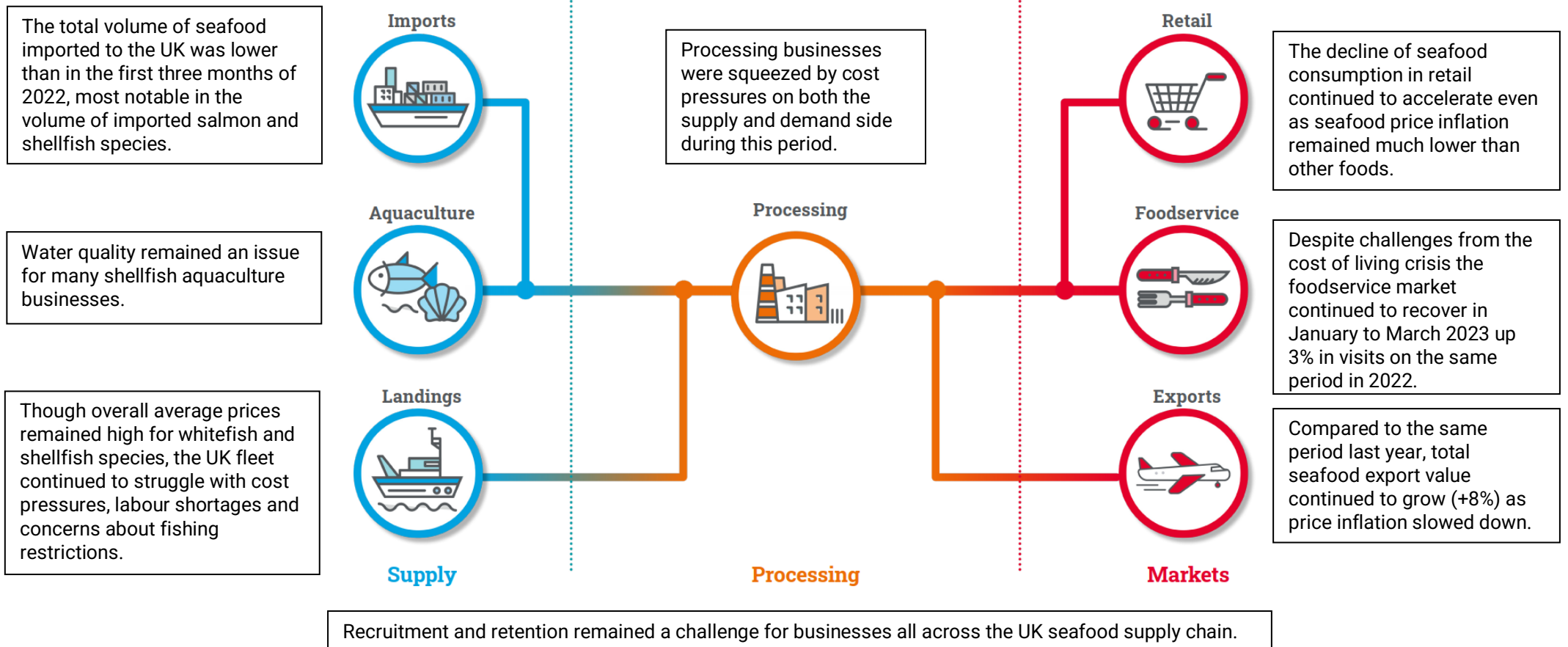
A special thanks to those who have shared invaluable industry insights with Seafish. Our thanks also go to our regional and economics and insight teams as well as other colleagues across Seafish who have provided input and feedback on this report.

Industry Impacts Overview

January-March 2023: Businesses across the supply chain continued to struggle with cost pressures and labour shortages.

During January to March the effect of high prices impacted the whole UK seafood supply chain. Different parts of the supply chain responded differently to this record level of inflation. Consumers continued to trade out of seafood in retail or switch to non-branded products or discount retailers. Retailers responded with deals and price match offers to retain shoppers. Some also worked with their seafood processing suppliers to adapt products to use cheaper or more readily available species, particularly for frozen whitefish products. Confidence amongst small business owners was also particularly low during this period, with many worried about businesses collapsing in 2023 as they battled against surging costs.

Recruitment and retention remained a challenge across the supply chain during January to March. In February the Migration Advisory Committee approached Businesses and industry representatives across the supply chain to provide responses to a call for evidence proposing certain job roles, including deckhands and factory floor workers, to be added to the Shortage Occupation List. The catching sector shared concerns with government about proposed changes to the Transit Visa system which would stop crew from working within UK territorial waters on a Transit Visa. The Seafish labour survey showed that most employers using Transit Visa Crew were not preparing to change. A few mentioned that they needed to move to Skilled workers visas because they operate within 12nm.



Seafood Supply



Imports

- The total volume of seafood imported to the UK was lower than in the first three months of 2022, driven by a decrease in the volume of imported salmon and shellfish species.
- Processing facilities in China and Vietnam boosted processing and export of pangasius and Alaskan pollock to meet increased demand for affordable whitefish alternatives to cod and haddock.

Preparations for post-Brexit changes continued during this period, however the regulatory landscape remained relatively unchanged. On 31st March it was agreed the UK would join the CPTPP, the major Indo-Pacific trade block. The agreement is expected to open opportunities for UK businesses to trade raw material with member countries which currently supply the UK with shrimp and prawn, salmon, pangasius, lobster, tuna, and many other seafood products.

Businesses continue to prepare for other regulatory changes during this period as UK government shared plans to release a draft Target Operating Model (TOM) outlining the implementation of the 2025 border strategy. Furthermore, the already delayed implementation of sanitary and phytosanitary checks on EU goods was extended further beyond its initial expiration date of 31 December 2022.

In the first three months of 2023, total seafood import volume was 6% lower (-9,402 tonnes) than the same period in 2022. Compared to January to March 2022, total import value was down for salmon (-6%) and shellfish (-17%) and up for demersal (+12%), pelagic (+14%) and all other species (+10%) (Figure 1). Overall, inflation of imported seafood prices started to ease in January to March 2023, but prices remained higher than in the same period of 2022. Specifically, price inflation of imported seafood reduced for demersal and shellfish species but continued to grow for imported salmon and pelagic species.

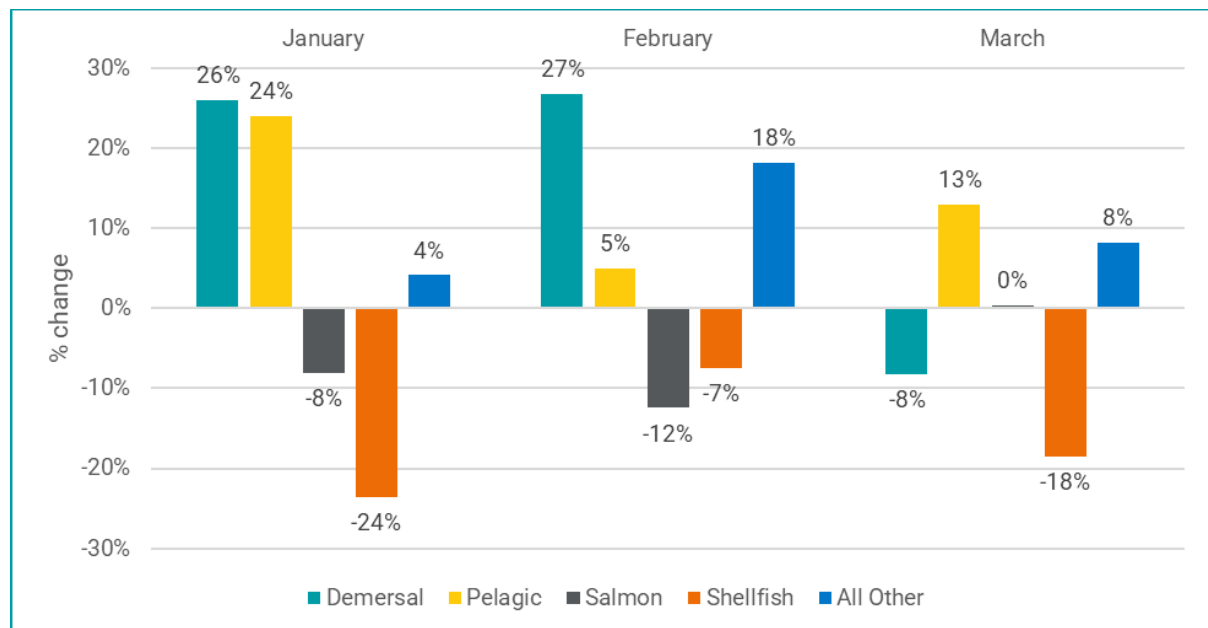


Figure 1. January to March UK import values compared to previous year, by month and species group.

Import value for demersal species was 12% higher in January to March 2023 compared to the previous year, while import volume stayed the same. While price inflation had begun to slow, prices remained 11% higher than in January to March 2022. Though cod and haddock still accounted for most of total demersal import volume during this period, some of their share was replaced by an increase in imports of the cheaper Alaskan pollock. This trend is likely to persist as shoppers continue to focus on price, choosing cheaper whitefish alternatives to the higher-priced cod and haddock.

Import value for pelagic species saw the largest increase across all species groups compared to January to March 2022. Total import value was up nearly £16 million (+14%) while import volume remained at a similar level (-2%), resulting in a 17% increase in average import prices. Tuna makes up 75% of pelagic import value. 25% of imported Tuna comes from Ecuador. Ecuador's central bank reported a 21% decrease in tuna export value in January compared to the previous year attributing the decline to the La Niña climate phenomenon, which cools South American waters, affecting yields and increasing costs. However, tuna imports to the UK from Ecuador increased 28% in volume 9% in value during this period. Imported tuna from the Philippines and France and mackerel from the Netherlands also saw strong growth in January to March. Mackerel from the Netherlands reportedly originated in Denmark where the pelagic fleet had been granted EU funding through a scheme which aims to compensate Danish vessel owners for the losses suffered as a result of the permanent reduction of fishing quotas.

Shellfish import value declined the most (-17%) out of all species groups in the first three months of 2023 compared to the same period in 2022. Meanwhile shellfish import volume decreased by 19% resulting in an average price increase of 3%. Shrimp and prawn products which accounted for approximately 80% of shellfish

import value, decreased by £19 million (-12%) compared to the same period in 2022. Shipments from most countries declined except from Iceland, Bangladesh, and the Netherlands. Notably, the proportion of UK shrimp and prawn imports from Bangladesh increased from around 5% to 7% despite reports of shrimp adulteration in Bangladesh. The most significant reduction was 1,100 tonnes less consigned from Vietnam, the UK's top supplying country of shrimp and prawn products. Vietnam exporters report a tough start to 2023 with reduced demand in Europe as consumers search for cheaper shrimp and prawn alternatives following recent price inflation of food.

Salmon import prices increased more than any other species group (+28%) in January to March 2023, while import volume decreased (-27%), compared to the same period in 2022. Salmon import prices continued to grow at a higher rate than any time in the past decade. Import volume declined at the fastest rate in a decade the consequence of this is import value for salmon started to level out. Norway experienced record prices and revenue for exported fresh salmon in the first three months of 2023. Increased demand, particularly from USA, combined with lower global production volume, a weaker Norwegian krone and the war in Ukraine are impacting price rises. These factors are resulting in lower volumes exported to markets in the EU, Asia and UK. More than 60% of the UK's salmon import volume was consigned from Norway, where details of a new tax on Norway's salmon industry were still being finalised. The 35% tax proposed in the final plan would be applied retrospectively to January 2023 and could deter UK importers from the Norwegian market in the future.

Another significant change to imported seafood products during this period was in pangasius. Imported pangasius continued to grow in volume (+27%) and price (+13%) resulting in £4 million more imported in January to March 2023 compared to the same period in 2022. Vietnam's pangasius export grew after the Tet holiday in February 2023 as processing plants increased production and demand increased from Europe and China. Production also increased with the expectation that UK processors would continue to look for alternative whitefish products to sanctioned wild-caught Russian whitefish.



Aquaculture

- Water quality remained an issue for many shellfish aquaculture businesses.

Water quality issues continued during this period with new warnings issued for several beaches across the UK in response to incidences of sewage discharge into the sea. This sewage dumping impacted both inshore fisheries and shellfish aquaculture businesses. These issues compounded other marine pollution and sedimentation problems caused by dredging in certain parts of the UK coastline.

Salmon aquaculture faced challenges from a group of Scottish lawmakers over official figures citing an increase in fish mortality in 2022. Housing and labour shortages in remote regions of Scotland also present challenges to the industry.



Landings

- Though overall average prices remained high for whitefish and shellfish species, the UK fleet continued to struggle with cost pressures, labour shortages and concerns about fishing restrictions.

As is often the case during the winter months, some vessels landed more inconsistently at the start of the year with poor weather dictating fishing patterns. This may partly explain the high average prices paid for many species, particularly whitefish and shellfish species, as businesses sought to secure supply (Figure 2).

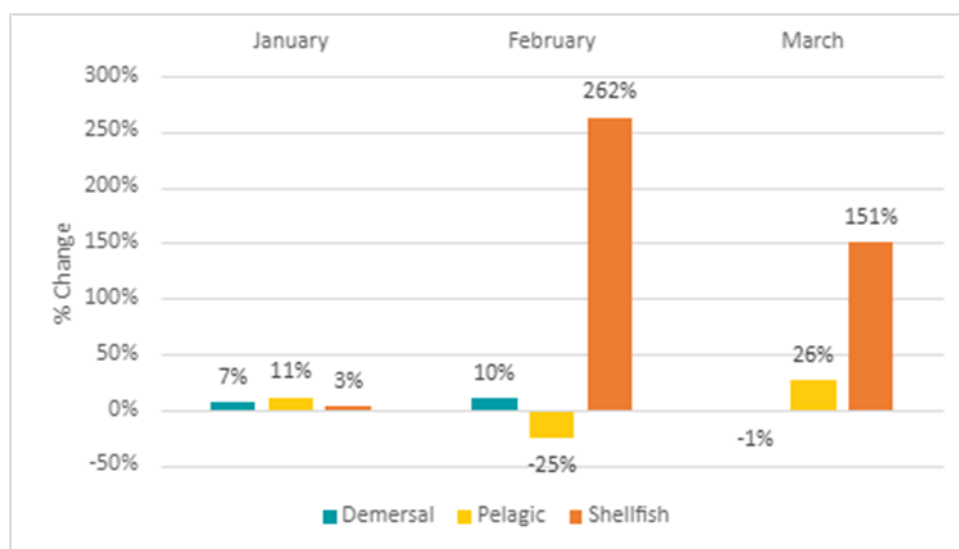


Figure 2. January to March UK landings values compared to previous year, by month and species group.

A range of regional challenges impacted fishing businesses during this period. In Scotland, whitefish vessels continued to land significant quantities of small fish

which carried a low value on the market. Peterhead Port Authority also faced resistance from fish merchants and fishing vessels regarding proposed changes to auction practises. This resulted in some limited disruption to the auction in January. Industry discussions were held to address these concerns. Further south, around the coastline water quality issues had a negative impact on inshore shellfish fisheries, particularly whelk fisheries.

Delayed quota allocation and fisheries management decisions also frustrated operators during this period. Provisional species quotas had not yet been issued by the Government by the end of February, reportedly hampering management for stocks with low total allowable catches (TACs), where swaps and trades are required.

More broadly, the industry faced longer term access concerns in the face of expanded fishing restrictions, including the introduction of highly protected marine areas (HPMAs) where no fishing activity would be allowed. In February, Defra announced three HPMAs in English waters. The Scottish Government also had a HPMAs consultation open during this period to gather views on the introduction of HPMAs covering 10% of Scottish seas. There were concerns about the Scottish consultation with some industry members reporting issues providing a legitimate response due to complexity and confusion with the process. More generally, this consultation provoked significant concern and pushback from the fishing industry as well as coastal and island communities. They cited a significant and very serious challenge to the economic viability of many different Scottish fleets (both inshore and offshore).

Cost- and labour pressures continued to adversely impact fishing businesses. During this period, the fishing industry sought clarity from the Home Office on the enforcement of changes to Transit Visa rules planned for April. Many in the industry argued that the change in Transit Visa rules, ultimately requiring migrant crew to be hired through the Skilled Worker Visa route, would make crew costs uneconomical for those fishing within 12 nautical miles of the UK coastline. These changes were expected to have the biggest impact on larger trawlers targeting Nephrops and whitefish around Northern Ireland and off the west coast of Scotland. With these and other operating cost pressures many business owners looked for funding support. In Wales during this period industry welcomed the announcement of a new £400,000 fund to open in April to support vessel owners to adapt to changing market conditions.

Production & Distribution



Processing, Transport & Logistics

- Processing businesses were squeezed by cost pressures on both the supply and demand side during this period.
- Strike action continued during this period, disrupting supply chain logistics across the UK border.

While this period is traditionally quiet businesses reported further challenges in the domestic market due to ongoing issues with inflation suppressing demand, particularly from retail. As food prices rose at a record rate to the end of December, retailers kept pressure on processing businesses to keep prices down, especially as they prepared for a change in supplier contracts in April.

In this challenging operating environment, processing businesses worked to keep costs down as much as possible. Whitefish processors continued to switch to cheaper whitefish alternatives like frozen pollock and basa to replace ever more expensive cod and haddock. Scottish whitefish landing patterns in January were also very changeable, making it more difficult for processors to manage consistent supply.

Alongside cost pressures squeezing processors on both the supply and demand side, businesses continued to manage a range of regulatory requirements. Though it was not yet in force, businesses began to prepare for incoming extended producer responsibility requirements. The first audits for the plastic packaging tax that came into effect in 2022 also began to take place, marking the end of the “bedding in” period for businesses. The EU single use plastics directive was implemented, creating new labelling requirements on recycled content and the recyclability of plastic packaging for products sold in Europe. These changes caused challenges for UK processors, especially as implementation varied across EU member states. Some aligned well with the plastic packaging tax labelling requirements, creating an easier transition for exports to those markets.

Strikes caused continued disruption. In January, the Public and Commercial Services (PCS) union announced plans to target major ports in southeast England following eight days of industrial action at airports over the end-of-year period. These scheduled strikes of up to 100,000 civil service members, including some border force workers, took place on Wednesday 1st February. They impacted the movement of goods through UK ports and airports and goods travelling to the UK from UK border control points in Calais, Dunkirk and Coquilles. Additional border force strikes between the 17th and 20th of February also affected both freight and passengers, again impacting terminals at Calais, Dunkirk and Coquelles.



Workforce

- Recruitment and retention remained a challenge for businesses across the UK seafood supply chain.

Labour shortages remained an acute issue across the supply chain during this period. In the catching sector, recruitment and retention remained challenging with those reliant on migrant labour employed through the Transit Visa system particularly worried about the impending April deadline for the enforcement of changes to Transit Visa rules. In March Seafish ran a survey of labour availability in the catching sector (for more details search for 'Access to Labour in fishing sector 2023' on www.seafish.org). In the processing sector, labour shortages were exacerbated by cost-of-living pressures making it more difficult to retain sufficient staff, with workers unable to stay loyal to businesses if they could get paid more elsewhere. Across the supply chain these labour shortages increased labour costs for businesses during this period as they increased pay and benefits to try to attract and retain sufficient staff.

Many businesses across the supply chain also struggle with housing shortages for staff. As a result, businesses considered ways to invest in housing for staff, particularly in remote areas. For example, a seafood restaurant in northwest Scotland bought an old motel building to accommodate staff and the rural aquaculture industry in Scotland made plans to erect bespoke wooden pods to house some of their workers. Scottish salmon businesses also continued to use local rentals, B&Bs and hotels in rural Scotland to house employees while also contributing to the local economy all year round. In addition to these efforts, the industry called to use £10 million of the money paid by salmon farmers in government rents to be ringfenced for direct investment in rural housing.

Regulatory changes impacting labour were discussed during this period. The Migration Advisory Committee opened its call for evidence to inform which job roles should be included on the Shortage Occupation List. As a shortage occupation, employers would be able to hire workers from overseas through the Skilled Worker Visa.

During this period, the catching sector also prepared for the enforcement of a change in Transit Visa rules from April. The enforcement of this change means crew will no longer be able to work on a Transit Visa in UK territorial waters. Once enforced, workers without an appropriate visa would be at risk of deportation. This change would mainly impact larger vessels operating around Northern Ireland and off the west coast of Scotland. During January to March the industry was waiting and hoping for a more lenient transition period from the Home Office to be granted, to allow them more time to hire workers through the Skilled Worker Visa instead of the Transit Visa.

Those operating day boats around the UK were also preparing for inclusion in new medical fitness certification requirements that will be enforced from November 2023, requiring that they have a clear medical every five years to go to sea. In response, some older vessel operators were reportedly considering de-registering their vessels and reducing fishing activity to recreational levels so that they weren't bound by this regulation.

Several training and apprenticeship programmes were underway during this period to address labour shortages across the supply chain. In Aberdeenshire, the Scottish Seafood Association ran a small pilot project with a cluster of schools to introduce students to the wide range of career opportunities in the industry. Food and drink businesses responded to labour shortages by hiring more area-specific apprentices in areas where there are skills shortages. The South Devon College in Paignton also ran a new Fisher Apprenticeship scheme alongside regional employers with a focus on seafood harvest and fishing methods. The Anglo Scottish Seafish Training Association ran a new introduction to commercial fishing course. Looking ahead, the Cornish Fish Producers' Organisation announced a new grant support scheme in January in partnership with the Merchant Navy Welfare Board that will enable fishermen to develop higher-level skills and qualifications to progress their fishing careers. And in February the Chartered Institute of Personnel and Development called on the UK Government to reform the apprenticeship levy into a flexible training levy, to ensure a greater share of opportunities for young people.

Domestic Markets

During January to March 2023 domestic consumption of seafood was impacted by the cost-of-living crisis. In the UK retail market, there were fewer shoppers shopping less often and spending more on significantly smaller baskets. As a result, the total volume of seafood sales in retail was down 8% during this period. Despite a slowdown in recovery to the GB foodservice market compared to October to December 2022, seafood servings Out of Home (OOH) grew by 14% in the first three months of 2023 compared to the same period in 2022. This reflected the market's resilience and consumers eagerness to continue to socialise and eat out of home despite cost-of-living pressures.



- The decline of seafood consumption in retail continued to accelerate even as seafood price inflation remained much lower than other foods.

Overall, at the end of March 2023, retail saw fewer shoppers shopping less often and spending more on significantly smaller baskets. To save money, shoppers continued to prioritise discount and variety retailers like B&M and to move away from branded products in favour of basic and premium own-label products.

Increasing pressure on personal finances resulted in both the value and volume of seafood sales continuing to fall to the end of March 2023 as inflationary price increases were unable to offset the drop in sales volume. Despite processors reporting pressure from retailers to keep prices low, seafood inflation built steadily over the six months to the end of March 2023 to reach nearly 7% by the end of this period. This was much lower than overall food inflation which stood at 17%. However, in a difficult economic climate, any increase in seafood price has been shown to accelerate the decline of seafood consumption.

At the end of March 2023, the total value of seafood sold through retail over the past 12 months stood at £4.08bn, down 1% compared to the previous 12 months. The volume of seafood sold in retail over the same period was 378,046 tonnes, down 7.5% on the previous year. Overall, this reflected a nearly 7% increase in seafood prices compared to the previous 12 months.

During January to March, shopper priority was firmly set on saving money. Sales volume sold across all three seafood sectors were in decline during this period (Figure 3). The decline in sales of chilled seafood accelerated the quickest, with volumes down nearly 9% in January to March 2023 compared to January to March 2022. This may be because of chilled seafood's high average price in a highly price sensitive market. It is expected that this decline will continue in 2023 unless financial pressure and uncertainty ease. Sales of ambient (tinned) and frozen seafood were also slow during the first two months of the year but began to pick up in March

(Figure 3). This is in keeping with grocery news that analysts expected 'sky high' food inflation to begin to ease from March 2023.

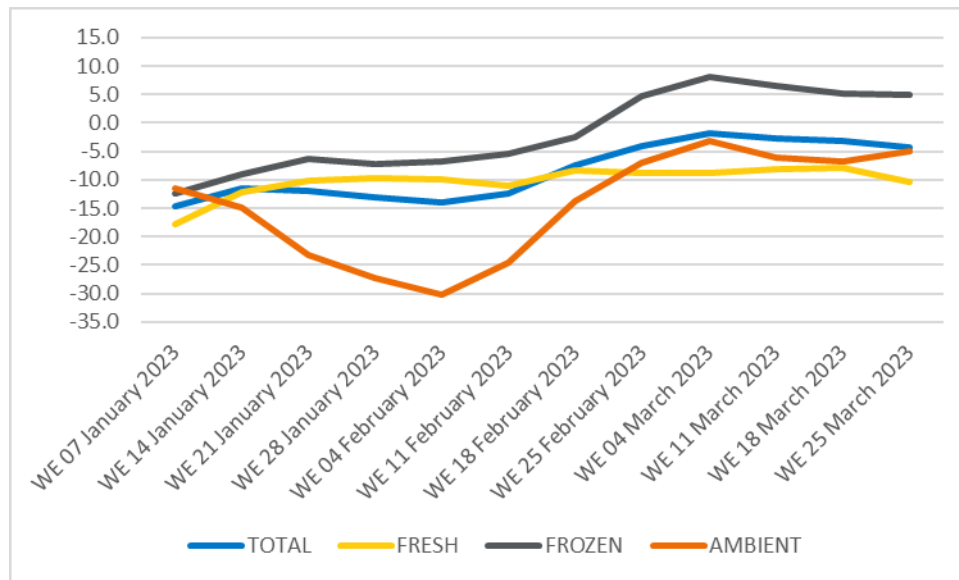


Figure 3. Weekly seafood volume sales in retail during January to March 2023 compared to previous year.

In March 2023, inflation drove an increase in sales value of many seafood segments. Only frozen fish fingers (+2%) and sushi (+9%) were in both volume and value growth to the end of March, compared to the 12 months to March 2022. The increase in frozen fish finger sales was driven by its low average price compared to other seafood products (£5.80/kg) and its reputation as a 'comfort food'. Sushi, although expensive, appealed to shoppers' desire for a healthy treat and a cheaper alternative to dining out of home.

Pressure on personal finances continued to impact on nearly all species sales in the first quarter of the year, with the sales volume of all of the top ten species either stable or in decline. Despite anecdotal reports that shopper demand for salmon was starting to slow, retail data shows that salmon volume sales remained relatively resilient compared to cod and haddock. Species with a growth in sales volume during this period were sardines and pilchards (amongst the lowest priced species) as shoppers continued to trade down to cheaper seafood products. Sales volume of hake, lobster and octopus also grew during this period as shoppers sought higher-end at-home meal alternatives to save money on eating out.



Foodservice

- Despite challenges from the cost-of-living crisis the foodservice market continued to recover in January to March 2023, up 3% in visits on the same period in 2022.
- Seafood was growing ahead of the total food and drink market with servings of seafood up 14% compared to the same period in 2022.

The foodservice market continued to recover in January to March 2023 with visits up across total foodservice, quick service restaurants and fish and chip shops, despite challenges from the cost-of-living crisis (Figure 4). Seafood was growing ahead of the total food and drink market with servings of seafood up 14% compared to the same period in 2022. However, out of home servings and visits for both total food and drink and seafood remain below 2019 (pre-Covid) levels.

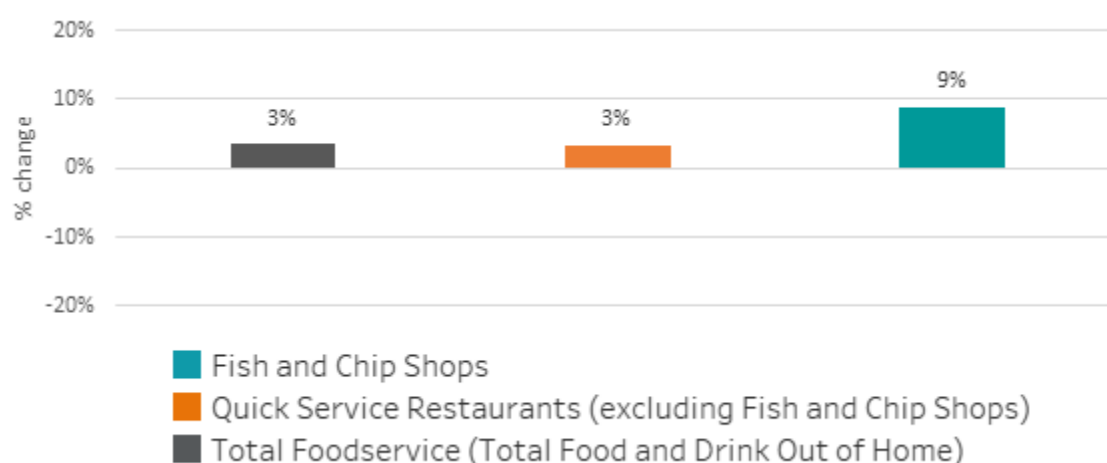


Figure 4. Foodservice visits during January to March 2023 compared to previous year.

While the 3% rise in visits to total foodservice was positive and highlighted the market's resilience, it was a slowdown from the 5% growth seen in the last three months of 2022. This showed that the market remained under pressure from the cost-of-living crisis as consumers continued to struggle with high food, utility and housing costs, leaving them with less disposable income to eat out of home. However, the continued recovery and growth in the sector compared to January to March 2022 showed that the drive for socialising, convenience and habitual eating out remained strong.

Many of the trends seen in the market during the pandemic started to reverse in January to March 2023. Lunch was growing faster than dinner as it benefitted from a return to more normal working and travelling patterns, while dinner, the best performing daypart during the pandemic, became stagnant as consumers cut back on deliveries and nights out in response to the rising cost-of-living. Additionally,

growth in delivery and drive through consumption channels started to decline but remain much bigger than they were before the pandemic.

Quick Service Restaurants (QSR) remained the channel with the largest servings share of seafood out of home consumption. Seafood visits and servings in the 12 months to March 2023 declined across QSR, Fish & Chip Shops and Travel & Leisure. However, visits and servings were up across all other channels (Pubs, Full-Service Restaurants, Workplace and Education) compared to the 12 months to March 2022, with Pubs leading in the growth.

A key opportunity as customers continue to manage the cost-of living crisis could be to offer more consumer deals. Here, loyalty-based apps can help. 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. These types of services have only become more important as consumers look to cut costs, with app-based loyalty platforms allowing outlets to communicate offers and deals directly to their customers.

International Markets



Exports

- Compared to the same period in 2022, total seafood export value continued to grow (+8%) even as price inflation slowed down. An increase in export volume in January to March 2023 reversed a longer-term decline.
- Seafood export value to the EU stayed at similar levels to 2022 as exports to non-EU markets grew. The proportion of exported seafood value to the EU dropped from 68% to 62%.

UK businesses, particularly small and medium-sized enterprises (SMEs), continued to face challenges and increased costs at the start of 2023 as post-Brexit export requirements presented ongoing challenges. The costs and time requirements associated with Export Health Certificates (EHCs) remained problematic, with issues arising at French border control posts. Further costs arose as local authorities raised the cost of EHCs to reflect the true cost, after initially keeping costs low post-Brexit. Technical glitches also posed problems. In January, drivers transiting goods across the UK border experienced issues with the government's Goods Vehicle Management System (GVMS) which failed to recognize the change of year to 2023. Looking ahead, with The Windsor Framework agreement reached by the EU and UK in February 2023, businesses hoped for some reduction in administrative burdens and delays between the UK and Northern Ireland in the future.

In the first three months of 2023, total seafood export value was 8% (+£31 million) above the same period in 2022. This growth was mainly driven by an increase in the volume of trout and pelagic species exported, as well as an increase in salmon export value. By species group, export value grew for pelagic (+16%), salmon (+12%) and other species (+37%), while export value decreased for demersal (-7%) and shellfish (-5%) species when compared to January to March 2022 (Figure 5).

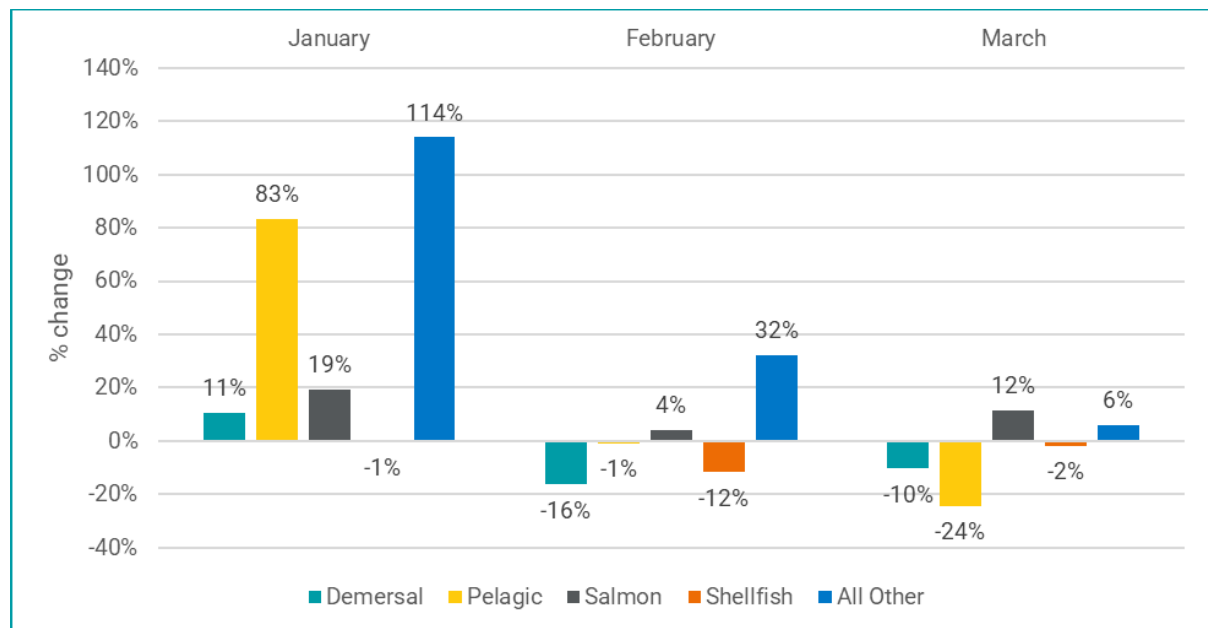


Figure 5. January to March UK export values compared to previous year, by month and species group.

The UK exported 7% less in terms of demersal species value in January to March 2023 compared to the same period in 2022. Demersal export volume was also down over the same period. Price inflation remained high as the average price for exported demersal species remained 17% above prices seen in January to March 2022. A decrease in cod export volume drove this decline (-72%) as cod export prices almost doubled (+92%) compared to January to March 2022. Meanwhile, the volume of cod landed by UK vessels to the UK and abroad continued to rise suggested that more of this raw material may have remained in the UK. Landings abroad by UK vessels was also 58% higher in live weight equivalence compared to the same period in 2022.

Pelagic export value was 16% higher than in January to March 2022 while export volume was up 24%, resulting in a 7% decrease in average prices. The volume exported began to increase as price inflation came down in the beginning of 2023, but this volume remained below pre-Covid levels. Higher pelagic export volume was driven by exports of mackerel to Japan, Vietnam, Latvia, Republic of Ireland and Nigeria as well as exports of herring to Lithuania and Canada.

Overall shellfish export value was down £4.5 million (-1%) and average export price decreased 11% compared to January to March 2022. The longer-term decline in the volume of shellfish exports reversed during this period as 7% more shellfish was exported during the first three months of 2023 compared to the same period in 2022. It was a mixed story for different shellfish species with export value growing for ephrops (to France), cuttlefish (to Italy), mussels (to the Netherlands) and rock lobster (to Hong Kong). Whelk export value remained similar to 2022 as export volume continued to increase. There was a significant reduction in whelk exported to South Korea while more was sent to Vietnam, France and China. Crab export value started to decrease in this period despite rising prices as the volume exported to China, Portugal, Republic of Ireland and Spain continued to fall. Shrimp and prawn

export value continue to drop dramatically to the lowest level in the past decade driven by a reduction in exports to France and the Netherlands.

Compared to the same period in 2022, salmon export prices increased 21% from £7.55 to £9.15/kg resulting in a 12% increase in total export value compared to January to March 2022. The volume exported dropped 8% to some of the lowest levels in the past decade. And although Scottish farmed salmon experienced higher than usual mortality rates across 2022, production remained stable. Exports to France continued to drop during this period and European buyers reported difficulty sourcing Scottish salmon at the start of 2023.

Another significant change appeared in trout exports. Export value was £18 million higher in early 2023 than in 2022 (+134%) as demand for trout increased in the dominant US market as well as in China, Singapore and the United Arab Emirates. In February 2023 MOWI, the world's largest salmon farmer took over Dawnfresh trout farms which produces 5,000t of trout annually over seven farms across Northern Ireland and Scotland.

Conclusion

Cost-of-living pressures and labour shortages remained the two biggest issues impacting the UK seafood supply chain during January to March 2023.

References and Data Sources

Retail

Data Source: Nielsen Scantrack UK.

Reference:

Seafood in retail factsheets:

<https://www.seafish.org/insight-and-research/retail-data-and-insight/>

Foodservice

Data Source: The NPD Group. Foodservice data are only available at the level of Great Britain, rather than United Kingdom.

Reference:

Seafood in foodservice factsheets:

<https://www.seafish.org/insight-and-research/foodservice-data-and-insight/>

Trade (Imports and Exports)

Data Source: HMRC monthly data via Business Trade Statistics (BTS), processed by Seafish.

Species groups are defined as follows:

Pelagic includes: Anchovy, Blue Whiting, Herring, Horse mackerel, Mackerel, Misc. pelagic, Sardine, Sprat, Swordfish, Tuna

Demersal includes: Alaska pollack, Cod, Coley, Dogfish, Grenadier, Haddock, Hake, Halibut, Ling, Megrin, Monkfish, Other flatfish, Other groundfish, Plaice, Pollack, Ray, Redfish, Seabass, Seabream, Shark, Sole, Toothfish, Turbot, Whiting

Shellfish includes: Clam, Cold Water Shrimps & Prawns, Crabs, Crayfish, Cuttlefish, Lobster, Mussels, Nephrops, Octopus, Other cephalopods, Other crustaceans, Other molluscs and aquatic invertebrates, Oyster, Prepared and preserved shrimps & prawns, Rock lobster and sea crawfish, Scallops, Sea cucumber, Squid, Warm Water Shrimps & Prawns

All Others includes: Carp, Catfish, Caviar, livers and roes, Cobia, Eels, Nile Perch, Other freshwater fish, Other marine fish, Other products, Other salmonids, Pink cusk-eel, Ray's Bream, Salmon, Surimi, Tilapia, Trout

Overall excludes: Non-food

Reference:

Seafish Trade and Tariff Tool:

<https://public.tableau.com/profile/seafish#!/vizhome/SeafishTradeandTariffTool/Overview>

Reference:

[A systematic review of fish adulteration and contamination in Bangladesh: A way forward to food safety - Khan - Reviews in Aquaculture - Wiley Online Library](#)

Landings

Data Source: Marine Management Organisation.

Reference:

MMO monthly landings statistics:

<https://www.gov.uk/government/collections/monthly-uk-sea-fisheries-statistics>

Real-time industry data

Data source: Seafish horizon intelligence. Real time intelligence on notable changes affecting the seafood industry sourced from the general media (media, newspaper articles and social media) and from industry and other stakeholder debates and conversations. www.seafish.org/insight-and-research/current-and-future-trends/ .

For more information please contact:
Jennifer Robson
Head of Economics Insight and Advice

E: Jennifer.Robson@seafish.co.uk

Seafish
18 Logie Mill
Logie Green Road
Edinburgh
EH7 4HS
www.seafish.org

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