

SEAFISH BIG PICTURE 2018



VALUE CHAIN



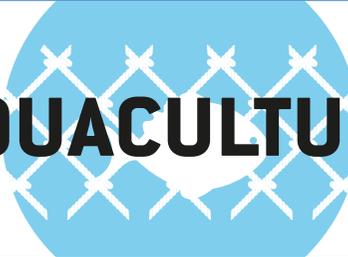
FLEET



LANDINGS



PROCESSING



AQUACULTURE



SAFETY



CONSUMPTION



**RESPONSIBLE
SOURCING**

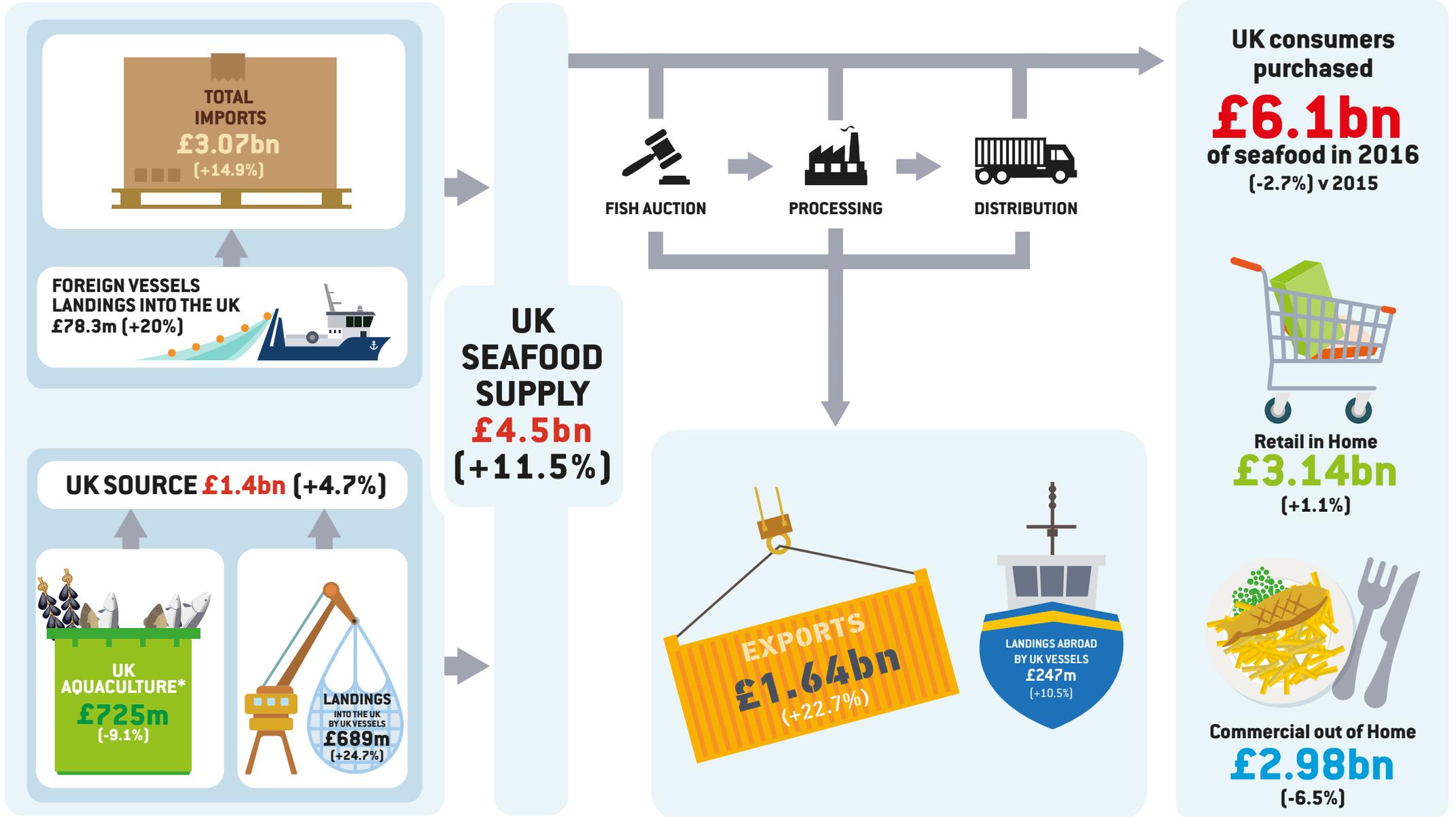


**INDUSTRY
REPUTATION**



VALUE CHAIN

2015/2016





VALUE CHAIN



Julia Brooks
Market Analyst

USEFUL LINKS:

- [Seafish UK Seafood Industry Overview](#)
- [Seafish Market Data](#)
- [Seafish Market Insight Factsheets](#)

Overall in 2016, UK consumers purchased £6.1bn of seafood, down 2.7% on 2015 levels. This decline was driven by the commercial out of home, foodservice market which experienced a 6.5% decline in seafood sales value, to £2.98bn. In contrast seafood sales through the major multiple retail outlets increase 1.1%, to be worth £3.14bn.



FLEET

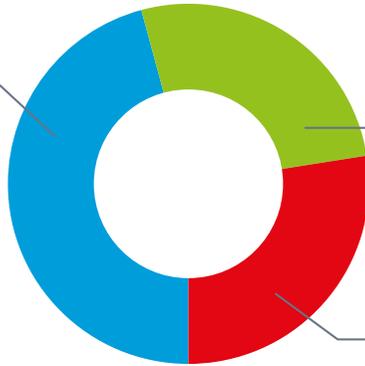
2016

MAKE UP OF FLEET

46% of UK fishing boats were active with fishing income greater than £10,000 in 2016.

46%

ACTIVE (VESSEL INCOME > £10K per vessel)
2,921 REGISTERED VESSELS



28%

INACTIVE (FISHING INCOME
£0 per vessel)
1,754 REGISTERED VESSELS

27%

LOW ACTIVITY VESSELS
(FISHING INCOME < £10k per vessel)
1,703 REGISTERED VESSELS

6,378

TOTAL UK
REGISTERED VESSELS

TOTAL UK FLEET TURNOVER

Turnover = fishing income + non-fishing income



£976m

OPERATING PROFIT



£214m

GROSS VALUE ADDED (GVA)



£478m

EMPLOYMENT

UK

FULL-TIME: 9,468
PART-TIME: 2,289
TOTAL: 11,757

SCOTLAND

FULL-TIME: 3,834
PART-TIME: 989
TOTAL: 4,823

NORTHERN IRELAND

FULL-TIME: 700
PART-TIME: 175
TOTAL: 875

WALES

FULL-TIME: 433
PART-TIME: 320
TOTAL: 753

ENGLAND

FULL-TIME: 4,501
PART-TIME: 805
TOTAL: 5,306

9,468 full time fishermen worked on UK registered fishing boats in 2016, a 7% decrease compared to 2015. There are an estimated 2,289 part time fishermen as well.



FLEET



Arina Motova
Senior Economist

USEFUL LINKS:

[Seafish Economics](#)

[Seafish Fleet Statistics](#)

[Fleet Economic Performance Data](#)

2016 was a very strong year in terms of the business performance of the UK Fishing Fleet. The increase of fishing revenues and continuing low fuel price have played a key role in these great results. Contribution of the sector to economy in terms of gross value added in 2016 was at the highest level since 2008. At the same time we estimate an increase of crew wages by 27% in 2016. Better economic performance has meant that not only have businesses experienced an increase in profits, but also crew members on average could enjoy higher pay.

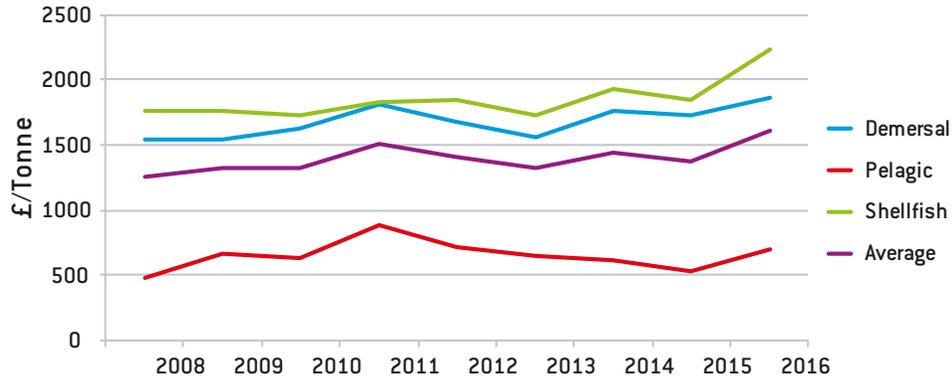


LANDINGS

2016

AVERAGE FIRST SALE PRICES BY SPECIES GROUP

[adjusted for inflation]

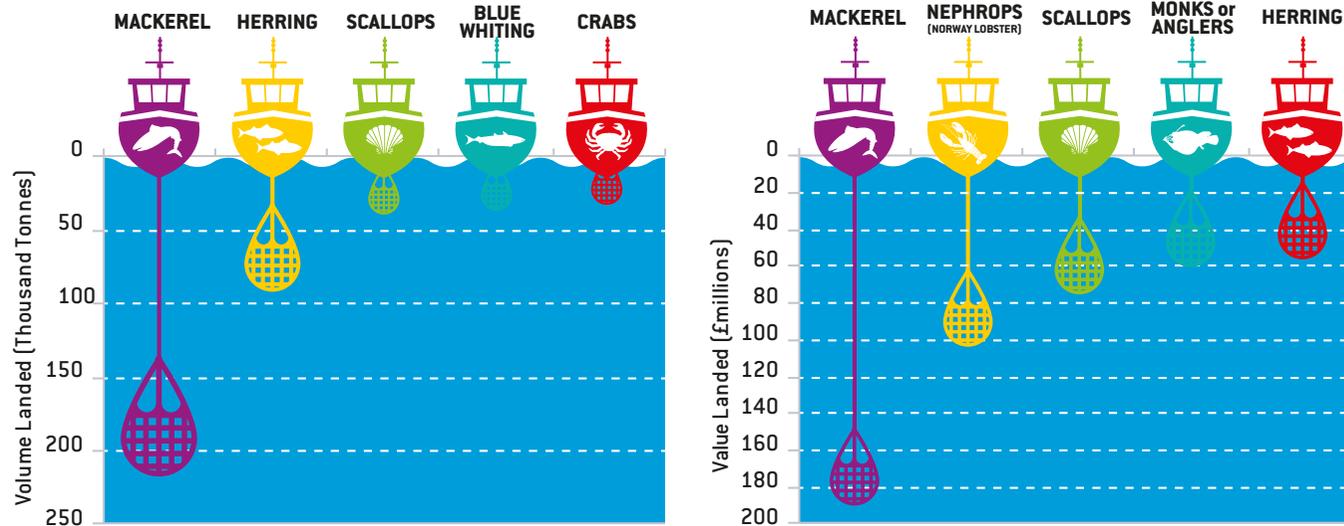


Prices increased from 2015 to 2016 for all species groups.

TOTAL UK FLEET TURNOVER

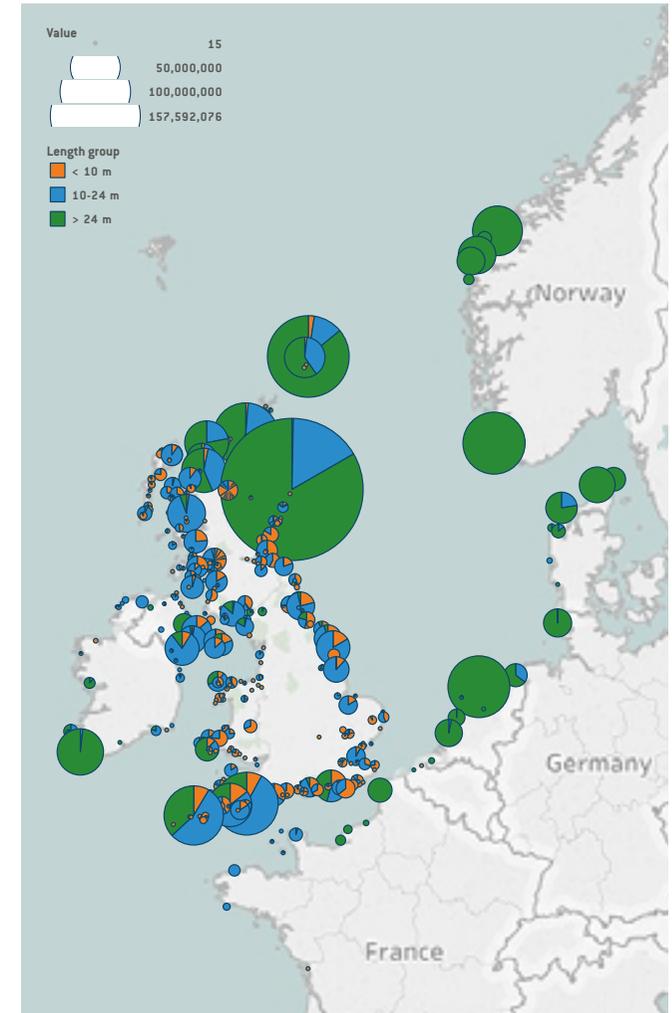
£936m

TOP SPECIES LANDED BY UK VESSELS 2016



Total landings by the UK fleet had a value of £936 million and weighed just over 700 thousand tonnes. Over half of total landings by value is made up of five species.

VALUE OF LANDINGS BY PORT



Just over 25% of total landings by value of the UK fishing fleet was landed abroad in 2016.



LANDINGS



Steve Lawrence

Economics Project Manager

USEFUL LINKS:

[Seafish Economics](#)

[MMO UK Sea Fisheries Annual Statistics](#)

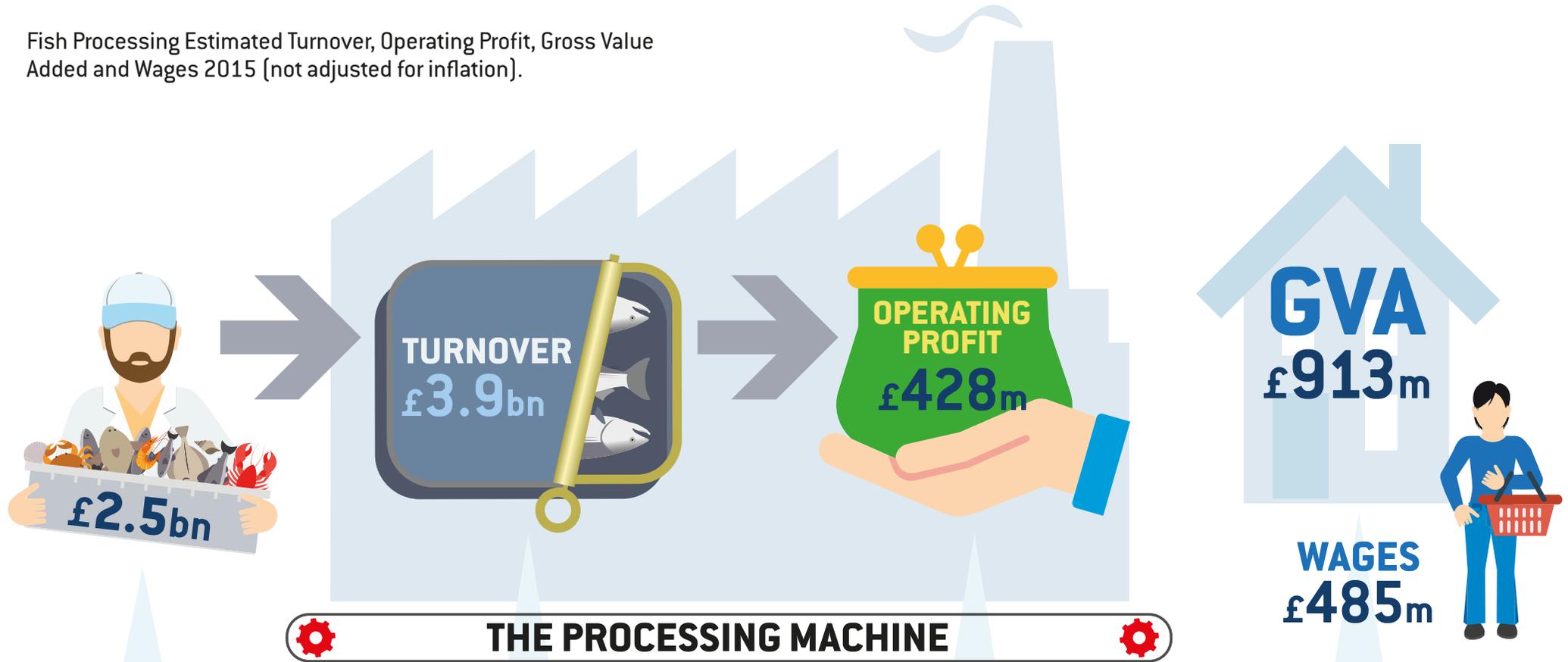
Whilst the total weight of landings fell by 1% in 2016, the total value of landings increased by 20% to £936million. The decrease in fishing income in 2015 and the subsequent rise in 2016 was mainly driven by the pelagic sector. The Russian trade ban, which was implemented in August 2014, contributed to the price of mackerel dropping to £645 per tonne in 2015. Last year the price of both mackerel and herring increased significantly due to strong demand in the Far East. The average price per tonne of all species landed was £1,318, the highest its been since 2011.



PROCESSING

2015

Fish Processing Estimated Turnover, Operating Profit, Gross Value Added and Wages 2015 (not adjusted for inflation).



THE PROCESSING MACHINE

The value of raw materials decreased 15% in 2015 to £2.5 billion.

In 2015 total fish processing turnover was an estimated £3.9 billion, down 10% from 2014.

Operating profit was £428 million in 2015, an increase of £186 million from 2014.

In 2015, Gross Value Added for UK processing was £913 million, up 20% from 2014. Wages were £485 million, down 7% from 2014.



PROCESSING



Ana Witteveen
Assistant Economist

USEFUL LINKS:

[Seafish Processing Sector Statistics](#)

[2016 Seafood Processing Industry Report](#)

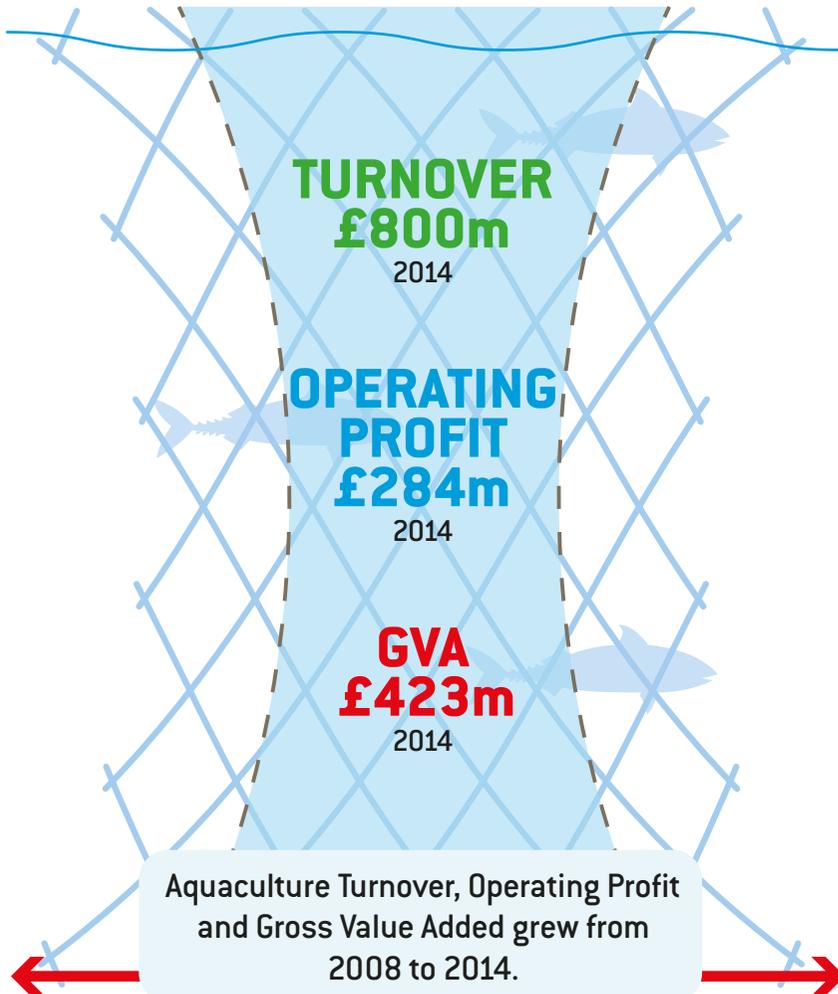
2015 was a very strong year in terms of the business performance of the UK fish processing sector. Though fish processing turnover was down an estimated 10% in 2015, operating profit increased by an estimated £186 million in 2015, due in part to the 15% decrease in the cost of raw processing materials. In 2015, fish processing contributed an estimated £913 million to the UK economy, the highest amount since 2008.



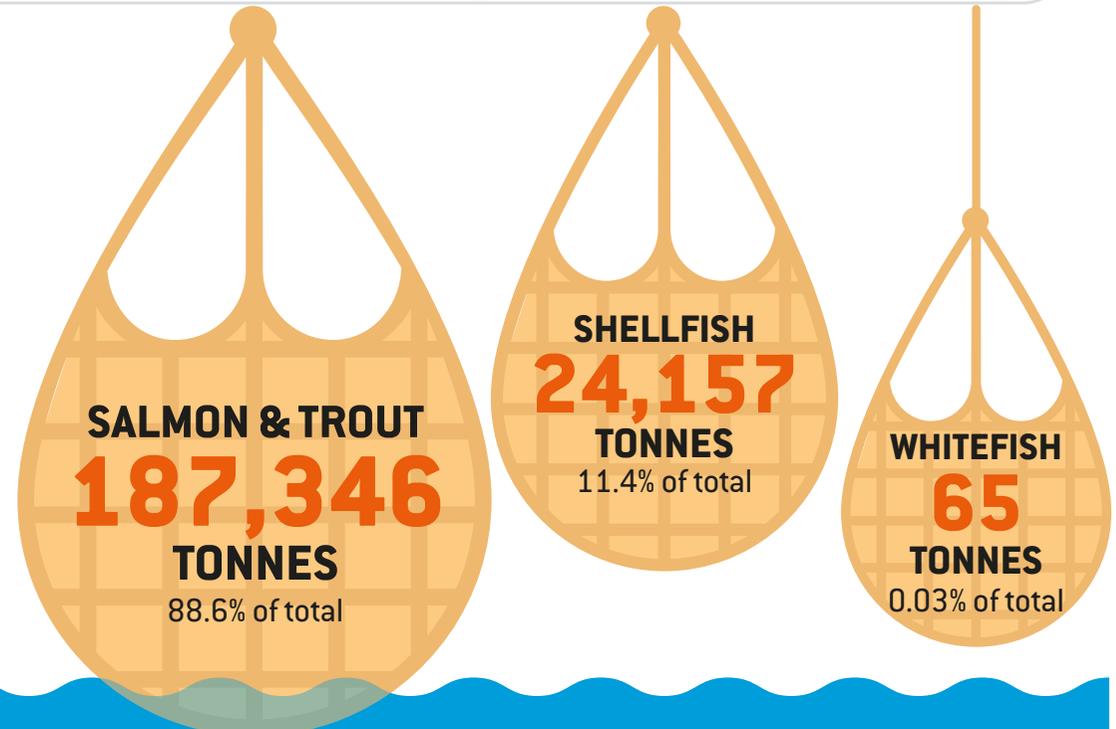
AQUACULTURE

2014/2015

AQUACULTURE; TURNOVER, OPERATING PROFIT AND GROSS VALUE ADDED 2014



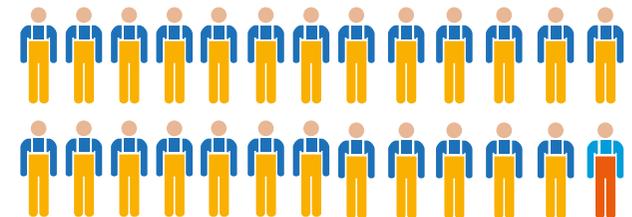
AQUACULTURE PRODUCTION (SALES VOLUME TONNES 2015)



A large majority of aquaculture production is focused on Atlantic Salmon from Scotland. Shellfish production (largely mussels) is also important and increased 12% in 2015.

EMPLOYEES (FTES) 2014

2,761



GROWTH 2008-2014: +3.8%



AQUACULTURE



Lee Cocker
Aquaculture Manager

Aquaculture remains the fastest growing food supply sector in the world with weight of production increasing steadily in the UK. Recent data has highlighted particular potential for production in Mussels and in 2017 Loch Fyne Oysters became the first blue mussel producer worldwide to receive certification against the Aquaculture Stewardship Council's bivalve standard.

USEFUL LINKS:

[Seafish Aquaculture](#)

[European Market Observatory for Fisheries and Aquaculture Products](#)

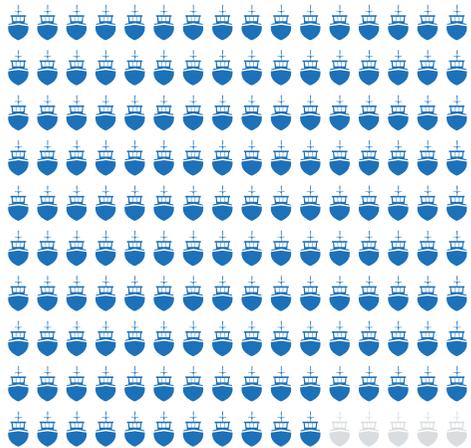


FISHING SAFETY

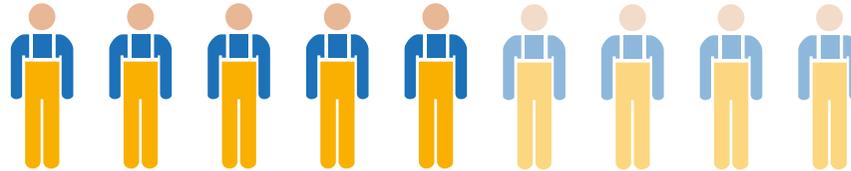
2007-2016



VESSELS LOST
155



ACCIDENTS REPORTED
2,322



In 2016, 9 fishermen lost their lives at sea,
and in 2017* 5 fishermen lost their lives at sea.

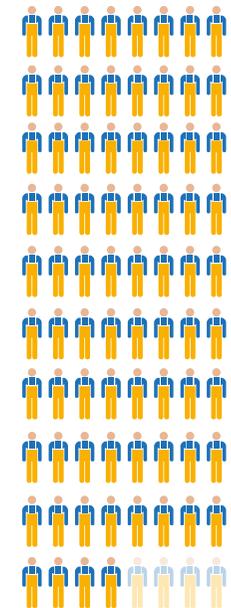
In the 12 months between 03 Sep-16 and 22 Sep-17 there were
ZERO FATALITIES.
This was the first time a 12 month period with no fatalities
has been achieved.



SERIOUS INJURIES
430



LIVES LOST
76





SAFETY



Simon Potten
Head of Safety,
Training & Services

USEFUL LINKS:

[Seafish Training](#)

[Marine Accident Investigation Branch](#)

[MAIB's Review of Lifejackets](#)

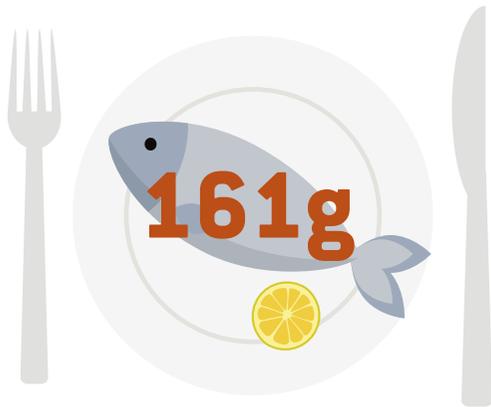
[Port Skills & Safety's Guidance on Safe Access to Fishing Vessels and Small Craft in Ports](#)

There are encouraging signs that the UK fishing industry is becoming safer and recently it achieved a notable milestone - zero fatalities for twelve months. This has never been achieved before. Recent initiatives have included the promotion and distribution of constant-wear Personal Flotation Devices to help prevent manoverboard fatalities (the biggest single cause of death amongst fishermen) and substantial funding to support fishermen wanting to develop their skills and knowledge through training. Further developments are planned to keep supporting fishermen's efforts to improve onboard safety. The Maritime & Coastguard Agency will be launching new Codes of Practice and the Fishing Industry Safety Group is currently developing a Safety Management System that will enable owners and skippers to ensure they are compliant with legal requirements. Eight fishing vessels were lost in 2016; the lowest ever number in a single year. Flooding and foundering accounted for three-quarters of these. With one exception all the vessels lost were over 20 years old (average 33), evidencing the safety benefit of investing in new fishing vessels. Fishing vessels are still being lost and fishermen are still suffering serious, life-changing injuries, so there is still much to be done but Seafish remains fully committed to helping fishing vessel owners, skippers and crew improve safety onboard their vessels.



CONSUMPTION

In 2015, each person ate an estimated 161g of seafood per week in the UK. This amounted to an average of 1.15 portions per person per week (based on a 140g portion size).

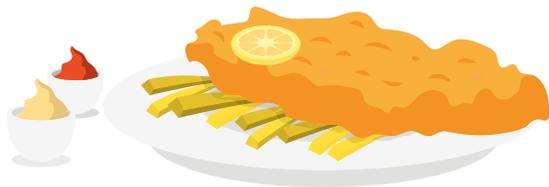


In 2015, as the UK slowly but steadily continued to move out of austerity, total foodservice led the recovery with a return to total servings growth.

2015-2017



Seafood in foodservice followed suit with servings up 3.8% by the end of 2015. The demand for more premium seafood offerings continued to grow into 2017.



Servings of fish and chips as a meal has also been growing strongly since 2015 across most channels. Traditional fish and chip shops have shown the highest growth in 2017, with servings up 12.2% compared to last year.

In multiple retail, total seafood volume has been in long term decline. The last period of volume growth was October to December 2016, however since that time the decline in total seafood volume has continued.





CONSUMPTION



Richard Watson
Market Analyst

Chilled seafood continues to grow in retail and the demand for premium seafood in foodservice was strong in 2017, despite a challenging economic and political climate. Overall, seafood consumption declined through austerity, only starting to recover in foodservice in 2015. In the UK we are eating less than the recommended 2 portions of seafood a week. Opportunities to grow consumption include convenient, tasty and value for money products which break the barriers and myths around seafood. Targeting the demand for spicy world food flavours and street food formats originating in foodservice is key. Emerging seafood trends include tapas style small plates and premium seafood sandwiches, an evolution of the hand made burger trend. New flavours include warm and spicy Mediterranean and Moroccan which are ideally suited to seafood.

USEFUL LINKS:

[Seafish Market Data](#)

[Seafood Industry Factsheet: Seafood Consumption \(2016 Update\)](#)



RESPONSIBLE SOURCING

2017



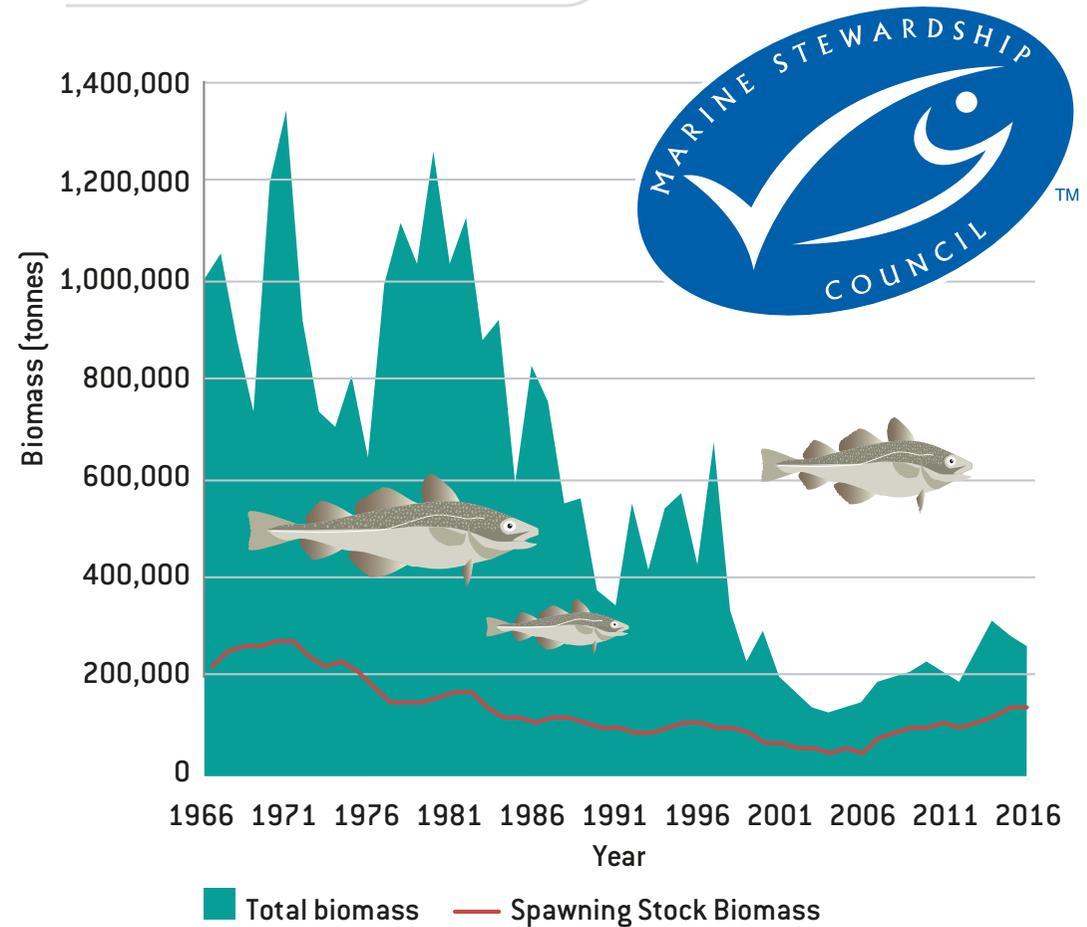
The RFS has now passed two significant milestones with the certification of the 100th vessel and the first full fleet to join the scheme.

Our first 100 RFS members contributed 27% of the total weight of landings by UK registered vessels in 2016.



Loch Fyne Oysters became the first blue mussel producer worldwide to receive certification against the Aquaculture Stewardship Council's bivalve standard.

BIOMASS OF NORTH SEA COD



In July 2017, North Sea Cod was certified as sustainable by the Marine Stewardship Council. Shoppers and diners can eat the popular fish with a clear conscience.



RESPONSIBLE SOURCING



Alex Caveen

Risk Assessment for Sourcing Seafood Manager

USEFUL LINKS:

- Seafish Responsible Sourcing Team
- Risk Assessment for Sourcing Seafood Tool
- Responsible Fishing Scheme
- Seafish Gear Database
- Tools for Ethical Seafood Sourcing
- Ethics In Seafood
- Seafood Ethics Common Language Group

Responsible Sourcing has featured heavily in the news this year with a number of positive stories for the UK industry. The biggest story on the environmental front took place in July when North Sea Cod was certified as sustainable by the Marine Stewardship Council having been at historically low levels just ten years before. Whilst this was an important milestone there are also many other stocks around the UK being fished within safe biological limits and rebuilding. The Responsible Fishing Scheme has also been going from strength to strength with the certification of the 100th vessel and the first full fleet joining the scheme.

There was increased activity this year on social responsibility, with seafood businesses keen to address issues in the supply chain. Seafish launched Tools for Ethical Seafood Sourcing (TESS), which is a one stop shop signposting users to numerous online resources and initiatives that support socially responsible business practices. The Seafood Ethics Common Language Group, which convenes stakeholders throughout the whole supply chain as well as government, NGOs, development organisations and charities, reached record attendance levels and continues to be an effective platform for discussion and debate to establish a common understanding of social responsibility issues.



INDUSTRY REPUTATION

2016-2017

FISH IN THE NEWS

Analysis of sentiment of news stories
(Oct 16 to Sept 17)



FISH IN THE NEWS

**96% OF NEWS ITEMS
EITHER POSITIVE OR
BALANCED!**



Only 4% neutral and less than 1% negative.

REACH OF NEWS ITEMS

Oct 15 -
Sept 16

89m



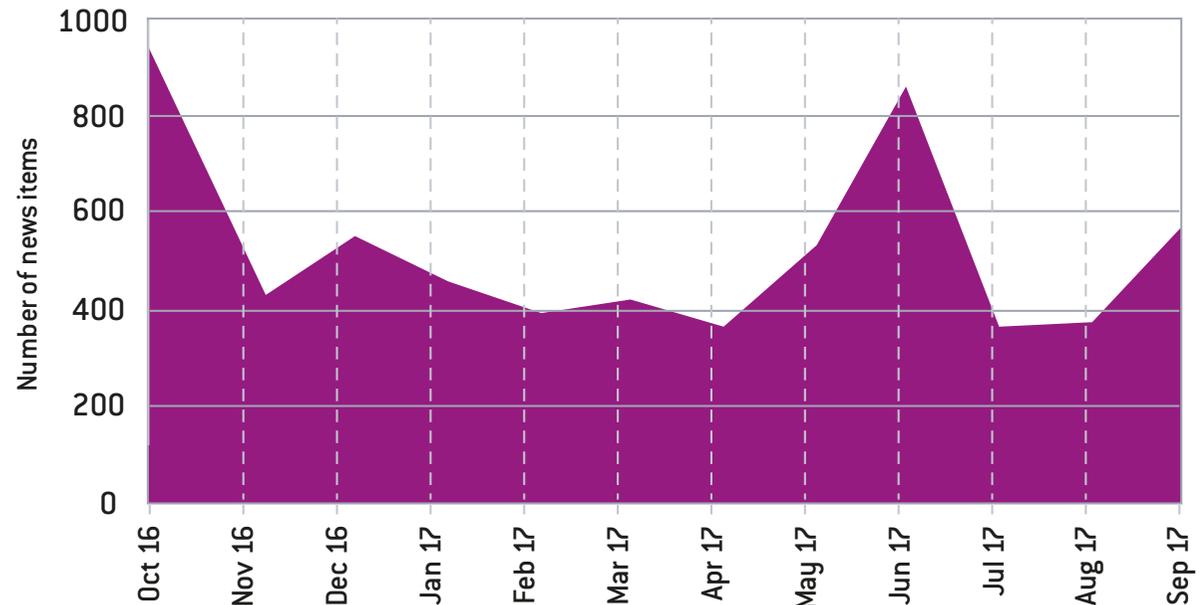
Oct 16 -
Sept 17

93m

The reach of news items related to the industry (i.e. how many people were exposed to these news items) increased by 4 million compared to the previous 12 months.

TIMELINE OF NEWS ITEMS

per Month (Oct 16 – Sept 17)





INDUSTRY REPUTATION



Nick Connelly
Media Officer

USEFUL LINKS:

[Seafish Twitter](#)

The figures produced during the 12 month period from October 2016 to September 2017 reveal an industry with a healthy reputation in the media.

The ongoing Brexit negotiations, issues of social responsibility and focus on product integrity ensured the fishing industry was a firm feature in the news, resulting in an overall increase in media coverage of 4% compared to the previous year.

The continuing success of consumer campaigns such as Seafood Week and National Fish & Chip Day, and the announcement that North Sea cod is MSC certified were particular highlights, helping to generate a very healthy 96% positive or balanced media sentiment.