SEAFISH

SEAFOOD INDUSTRY **FACTSHEET**

FEBRUARY 2018

Segments

Note: GB is data for England, Scotland and Wales only. Some of the data is only available on either a GB or UK level.

1. Seafood Industry Overview

In the latest 12 months* over the last year 97% of households in GB bought seafood, with their total purchases estimated to be worth around £6.61bn which is 4.7% more than the previous year.

*Nielsen HomeScan year ending 7 Oct'17, and NPD Crest data year ending Jun'17.

2. UK Sea Fish Processing Sector

- In 2016 the UK sea fish processing industry provided around 13,554 full-time jobs across 307 units. The industry is consolidating with the number of sites reducing and average employment per site increasing over the last five years.
- Humberside and the Grampian region of Scotland dominate the sea fish processing industry in terms of full-time equivalent employment (over 60% of total industry employment in 2016 located within these regions).
- In 2014 the industry had an estimated turnover of over £3 billion of which £184 million was operating profit.
- In 2014 the industry contributed over £550 million in Gross Value Added to the UK economy.

Source: 2016 UK Seafood Processing Industry Report (Seafish)

3. UK Seafood Industry

- In 2016, there were 6,378 registered fishing vessels, a reduction of 7% since 2006. Of these vessels 1,754 are classified as inactive and 1,703 are classified as 'low activity', referring to vessels with average landings of less than £10,000 per year.
- Excluding inactive vessels, the fleet in 2016 comprised 3,394 vessels under 10m in length and 1,230 over 10m.
- There were an estimated 11,757 fishermen in the UK in 2016, down 9% since 2006 and 350 lower than in 2015. Of these, 5,306 were based in England, 753 in Wales, 4,823 in Scotland and 875 in Northern Ireland. Part-time fishermen accounted for 19 percent of the total compared with 20% a decade ago.

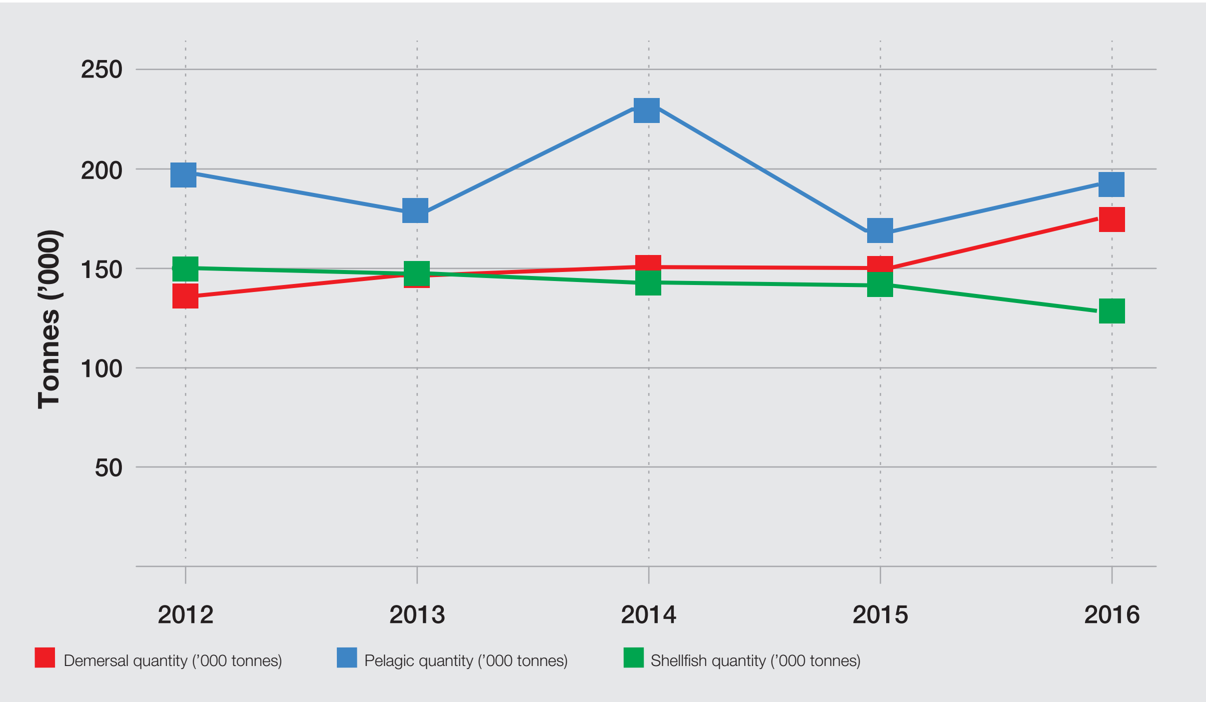
Source: UK Sea Fisheries Annual Statistics Report 2016 (MMO)

4. UK Landings

- In 2016, UK vessels landed 701,000 tonnes of seafood into the UK and abroad with a value of £936 million. Compared with 2015, this represents a 1% decrease in quantity but a 21% increase in value and was mainly driven by large increases in market prices for key pelagic and shellfish species.
- In 2016, the average value of shellfish landed by UK vessels into the UK was around £2,200 per tonne (live weight) compared with £1,900 per tonne in 2015. For demersal species, the average price increased from £1,800 per tonne in 2015 to £1,900 per tonne in 2016. Pelagic prices rose from an average of £500 per tonne to £700 per tonne.
- 64% of fish caught by the UK fleet was landed in the UK. Landings in the UK made up 74% of fishing income for UK vessels. The UK fleet accounted for 89% of all fish landed into the UK.
- By quantity landed, pelagic species accounted for around 53% of all landings by UK vessels in 2015, with demersal fish and shellfish making up around 26% and 22% respectively. The quantity of pelagic and demersal fish landed decreased by 7% and 5% respectively between 2015 and 2016. Shellfish landings were largely static in 2015 and 2016.
- By value, demersal fish and shellfish each accounted for 36% of total landings with pelagic fish at 28%.

Source: UK Sea Fisheries Annual Statistics Report 2015 (MMO)

UK landings by UK and foreign vessels 2010 - 2016



Source: Fisheries Administrations in the UK

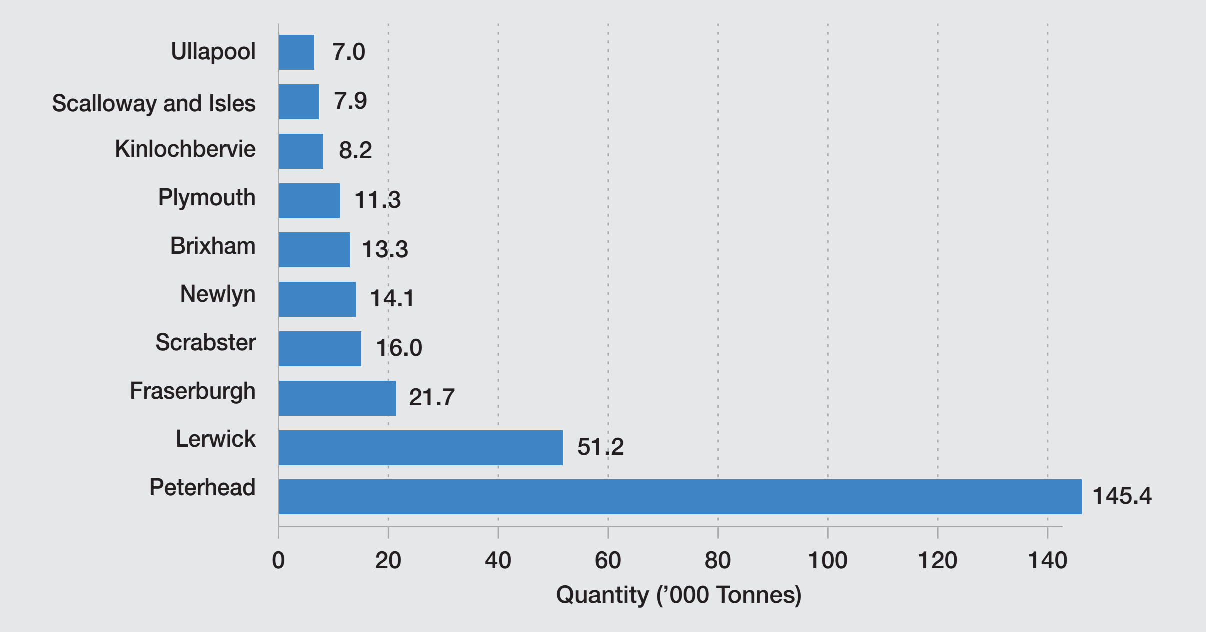
Landings into the UK by UK vessels: 2012 to 2016 (a)

	Quantity (‘000 tonnes)					Value (£ million)				
	2012	2013	2014	2015	2016	2012	2013	2014	2015	2016
Bass	0.8	0.8	1.0	0.7	0.5	5.7	5.7	7.4[R]	5.4	4.9
Brill	0.4	0.3	0.3	0.4	0.4	2.0	1.9	1.8[R]	1.9	2.3
Cod	14.4	13.5	14.7	16.7	21.7	26.9	26.7	29.3[R]	31.9	39.9
Dogfish	0.8	0.8	0.8	1.8	1.9	0.2	0.2	0.2[R]	0.5	0.5
Gurnard	2.0	2.0	1.4	1.9	1.9	1.5	1.3	0.9	1.1	1.2
Haddock	34.4	39.2	37.2	33.5	33.9	36.2	44.1	51.7[R]	45.6[R]	45.0
Hake	12.0	11.0	15.6	15.9	19.9	26.1	27.2	37.4	38.4	47.6
Halibut	0.1	0.1	..	0.1	0.1	0.7	0.5	0.4	0.4	0.9
Lemon sole	2.8	2.8	2.7	2.1	2.2	7.5	8.3	8.6[R]	8.2	9.0
Ling	5.1	5.3	6.1	5.8	7.0	7.4	7.2	7.6[R]	7.7	10.3
Megrim	4.0	4.6	3.7	3.5	3.7	10.0	10.0	9.4[R]	8.7[R]	10.2
Monks or anglers	12.2	12.0	12.7	15.8	18.7	38.3	34.8	35.1[R]	38.8	52.9
Plaice	4.2	4.9	4.3	4.4	5.2	4.6	4.8	4.1[R]	4.5	5.9
Pollack (lythe)	1.8	1.6	2.0	1.7	2.0	4.0	3.5	3.6[R]	3.2	4.5
Saithe	16.4	19.7	17.5	18.8	17.4	17.3	17.1	17.0	17.0	18.8
Sand eels	..	..	..	..	..	..	..	..	..	..
Skates and rays	3.8	3.5	3.1	3.2	3.1	5.0	4.4	3.5	4.0	4.1
Sole	2.7	2.6	2.6	2.1	2.1	22.8	18.1	16.5[R]	15.7	18.6
Turbot	0.6	0.5	0.6	0.6	0.6	4.5	4.3	4.6[R]	4.7	5.3
Whiting	11.0	12.4	11.7	11.3	11.0	11.1	11.7	12.3[R]	11.6	11.4
Witch	1.0	0.9	0.8	0.7	0.9	1.2	0.9	0.8	0.8	1.1
Other demersal (b)	9.7	10.9	11.8	9.0	10.1	14.3	16.1	17.5	13.9	18.2
TOTAL DEMERSAL	140.2	149.5[R]	150.7	150.1[R]	164.4	247.4	248.8	269.8[R]	264.1[R]	312.4
Blue whiting	24.5	9.4	9.7	12.1	11.9	7.5	2.1	1.3	2.0	2.4
Herring	63.1	46.0	48.8	42.0	47.9	33.2	16.9	13.5	14.6	29.5
Horse mackerel	9.6	2.9	3.7	3.2	1.7	3.4	1.1	1.6	1.5	0.8
Mackerel	89.2	99.6	155.6	103.9	114.5	80.6	89.4	125.7	66.5	97.5
Sardines	4.3	3.7	3.4	4.2	8.0	1.1	1.0	0.8	1.6	2.6
Other pelagic	8.8	5.2	5.7	3.8	6.1	2.9	1.1	2.1	0.8	1.6
TOTAL PELAGIC	199.5	166.7	226.9	169.3	190.0	128.7	111.6	145.1	86.9	134.3
Cockles	2.2	10.1	10.2	11.2	5.0	1.5	5.3	7.9	5.7	3.5
Crabs	29.9	29.3	32.8	29.4[R]	32.5	39.1	39.1	44.8[R]	39.8[R]	47.6
Cuttlefish	5.4	3.7	3.1	6.2	5.2	10.9	6.6	6.5	10.9	14.4
Lobsters	3.1	3.0	3.4	3.1	3.3	31.0	29.9	33.5	32.2[R]	39.5
Mussels	0.7	0.5	0.2	1.0	1.6	0.4	0.2	0.1	0.8	0.2
Nephrops	33.0	28.5	30.5	25.9	30.9	111.3	86.3	98.8	82.3[R]	100.8
Scallops	54.3	49.4	39.7	41.5[R]	39.4	68.4	63.7	60.3[R]	65.7[R]	76.0
Shrimps and prawns	1.0	0.9	0.6	0.3	0.8	2.4	2.4	1.4	0.8	3.0
Squid	1.9	1.9	2.9	1.9	2.0	6.7	7.3	9.3	6.6	8.3
Whelks	16.5	20.1	19.8	20.9	22.7	11.2	13.8	16.2[R]	18.6	22.9
Other shellfish	2.4	1.9	1.1	1.3	1.2	5.9	5.4	3.7	4.0	4.7
TOTAL SHELLFISH	150.3	149.2	144.3	142.6[R]	144.6	288.7	259.9	282.4[R]	267.3[R]	321.0
TOTAL ALL SPECIES	490.1	465.4	521.8	462.0[R]	499.0	664.9[R]	620.3	697.3[R]	618.3[R]	767.7

Source: Fisheries Administrations in the UK (a) Landings data include transhipments and Islands figures. (b) Includes fish roes and livers.
.. means ‘negligible’ (less than half the last digit shown).
[R] means ‘revision’.

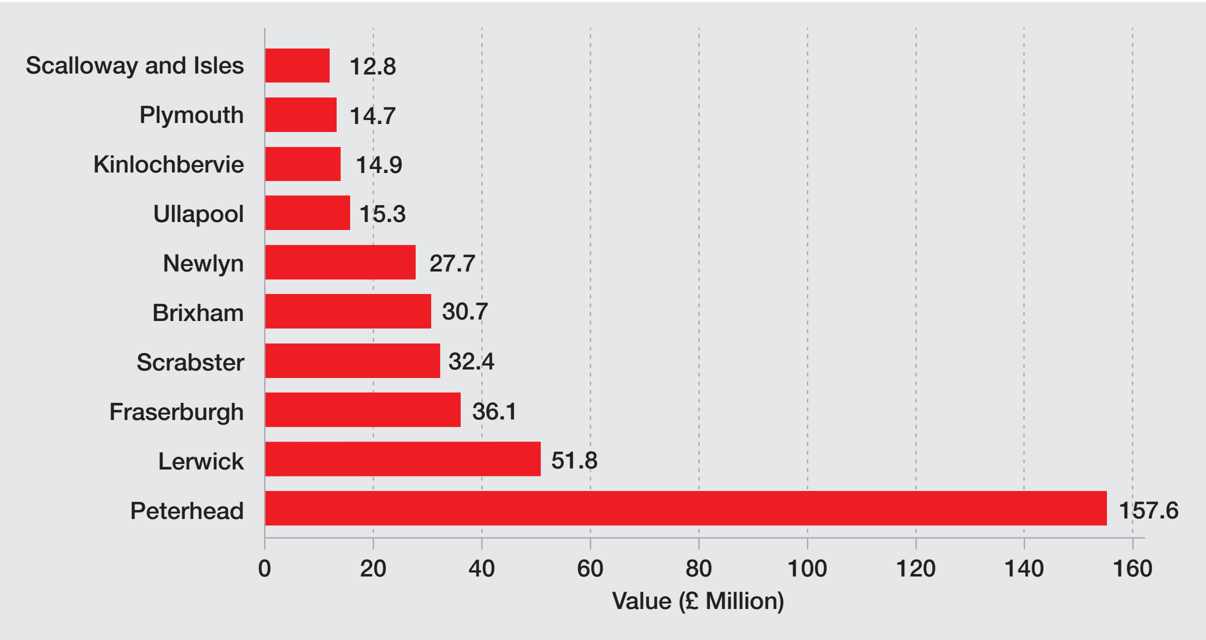
5. UK Ports

Top 10 UK ports – landings by UK vessels: 2016 By volume



Source: MMO: UK Sea Fisheries Statistics 2016 - Landings

Top 10 UK ports – landings by UK vessels: 2016 By value



Source: MMO: UK Sea Fisheries Statistics 2016 - Landings

6. UK Seafood Imports

- According to the 2016 annual data*, seafood imports from abroad and landings by foreign vessels, account for approximately 68% of the value and 53% of the total volume within the UK seafood value chain.
- Over the year ending August 2017, the volume of seafood imported into the UK fell 1.8% to just under 700,800 tonnes, whilst the average price per kg increased 14.9% to £4.58. This increased the value of seafood imports 12.8% to over £3.21bn.
- Several species have experienced growth in both import volumes and values: warm-water shrimps and prawns, prepared and preserved shrimps and prawns, crabs, cold-water shrimps and prawns, coley and monkfish.
- The following species have seen inflation driven import value growth, as the import volume declined: salmon, cod, tuna, haddock, pollack, mackerel and plaice.
- The only species to experience a decline in both import value and volume are: lobster, scallops, herring and nephrops.
- These shifts in species are reflected in the performance of the countries who import to the UK. The value and volume of seafood imported from the following countries increased: China, Denmark, Sweden, Vietnam, India, Netherlands, Poland, Spain, Russia and Ecuador.
- The following countries imported less volume but for a higher value: Faroe Islands, Germany, Norway, Ghana and Bangladesh.
- However, seafood imports from the following countries decreased by value and volume: Iceland, Canada, U.S.A., Thailand and France.

* Source: HMRC via BTS Dec'16, MMO UK Sea Fisheries Statistics 2016, Cefas data for 2015. Source: HMRC via British Trade Statistics YE August 2017

Top import species ranked by value 2016 - 2017

Species	Imports YE August 2016			Imports YE August 2017			% Change 2017 v 2016		
	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value	Volume	Ave £ per Kg
Salmon	£471,539	90,029	£5.24	£570,784	85,546	£6.67	21.0%	-5.0%	27.4%
Cod	£469,947	118,797	£3.96	£506,413	114,588	£4.42	7.8%	-3.5%	11.7%
Tuna	£349,240	118,271	£2.95	£416,478	114,627	£3.63	19.3%	-3.1%	23.0%
WW shrimps & prawns	£285,396	37,876	£7.53	£356,914	42,124	£8.47	25.1%	11.2%	12.4%
P&P Shrimps & prawns	£297,812	38,818	£7.67	£323,052	39,048	£8.27	8.5%	0.6%	7.8%
Haddock	£118,406	46,417	£2.55	£120,523	44,238	£2.72	1.8%	-4.7%	6.8%
Pollack	£65,440	32,551	£2.01	£70,130	32,027	£2.19	7.2%	-1.6%	8.9%
Mackerel	£40,060	20,678	£1.94	£45,117	17,819	£2.53	12.6%	-13.8%	30.7%
Lobster	£37,769	2,971	£12.71	£34,062	2,329	£14.63	-9.8%	-21.6%	15.0%
Scallops	£46,815	4,378	£10.69	£22,923	1,511	£15.17	-51.0%	-65.5%	41.9%
Crabs	£17,905	2,314	£7.74	£20,662	2,830	£7.30	15.4%	22.3%	-5.7%
CW shrimps & prawns	£14,886	2,060	£7.23	£17,459	2,160	£8.08	17.3%	4.9%	11.8%
Herring	£15,234	10,119	£1.51	£13,907	7,394	£1.88	-8.7%	-26.9%	24.9%
Plaice	£12,729	4,515	£2.82	£13,715	4,361	£3.14	7.7%	-3.4%	11.6%
Nephrops	£10,264	3,038	£3.38	£9,782	2,601	£3.76	-4.7%	-14.4%	11.3%
Coley	£7,533	2,391	£3.15	£8,150	2,848	£2.86	8.2%	19.1%	-9.2%
Monkfish	£5,598	1,625	£3.44	£5,911	1,759	£3.36	5.6%	8.2%	-2.5%
All others	£580,435	177,049	£3.28	£654,354	182,954	£3.58	12.7%	3.3%	9.1%
Total	£2,847,009	713,895	£3.99	£3,210,336	700,764	£4.58	12.8%	-1.8%	14.9%

Key: YE - Year Ending, CW - Cold Water, WW - Warm Water, P&P - Prepared and Preserved

Source: HMRC via British Trade Statistics YE August 2017

Top 20 import countries ranked by value 2016 - 2017

Country	Imports YE August 2016			Imports YE August 2017			% Change 2017 v 2016		
	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value	Volume	Ave £ per Kg
Iceland	£285,857	63,117	£4.53	£269,227	55,564	£4.85	-5.8%	-12.0%	7.0%
Faroe Islands	£203,666	43,009	£4.74	£233,407	40,244	£5.80	14.6%	-6.4%	22.5%
China	£185,464	63,796	£2.91	£212,686	66,213	£3.21	14.7%	3.8%	10.5%
Germany	£194,836	53,623	£3.63	£208,961	52,142	£4.01	7.2%	-2.8%	10.3%
Denmark	£149,807	39,757	£3.77	£195,434	41,353	£4.73	30.5%	4.0%	25.4%
Sweden	£129,884	31,515	£4.12	£178,521	32,026	£5.57	37.4%	1.6%	35.3%
Vietnam	£136,516	29,974	£4.55	£177,309	31,929	£5.55	29.9%	6.5%	21.9%
India	£93,647	17,070	£5.49	£130,140	19,775	£6.58	39.0%	15.8%	20.0%
Netherlands	£109,254	25,646	£4.26	£120,288	27,359	£4.40	10.1%	6.7%	3.2%
Canada	£114,483	14,554	£7.87	£112,799	13,985	£8.07	-1.5%	-3.9%	2.5%
Norway	£93,559	34,436	£2.72	£98,363	30,358	£3.24	5.1%	-11.8%	19.3%
U.S.A.	£91,510	21,557	£4.25	£89,131	18,304	£4.87	-2.6%	-15.1%	14.7%
Poland	£66,757	16,844	£3.96	£85,018	19,259	£4.41	27.4%	14.3%	11.4%
Thailand	£87,179	21,238	£4.10	£84,306	15,448	£5.46	-3.3%	-27.3%	32.9%
Spain	£61,984	14,172	£4.37	£81,989	16,943	£4.84	32.3%	19.6%	10.6%
Ghana	£59,069	21,348	£2.77	£74,190	21,290	£3.48	25.6%	-0.3%	25.9%
France	£78,195	12,770	£6.12	£71,074	10,291	£6.91	-9.1%	-19.4%	12.8%
Bangladesh	£69,268	7,366	£9.40	£70,142	6,998	£10.02	1.3%	-5.0%	6.6%
Russia	£50,140	15,342	£3.27	£62,900	15,979	£3.94	25.4%	4.2%	20.4%
Ecuador	£37,039	11,856	£3.12	£59,924	14,995	£4.00	61.8%	26.5%	27.9%
Top 20 total	£2,298,114	558,990	£4.11	£2,615,809	550,455	£4.75	13.8%	-1.5%	15.6%
Top 20 share of total imports	80.7%	78.3%		81.5%	78.6%				

Key: YE - Year Ending

Source: HMRC via British Trade Statistics YE August 2017

7. UK Seafood Exports

- Over the year ending August 2017, export volumes fell 2.1% to just under 446,500 tonnes, whilst the value increased 26.5% to £1.89bn, as the average price per kg increased 29.2% to £4.23. These exports include a large proportion of the UK's domestic catch, as it earns a higher price in foreign markets.
- Several species have experienced growth in both export volumes and values: salmon, nephrops, warm-water shrimps and prawns, monkfish, cold-water shrimps and prawns, haddock and plaice.
- The following species have seen inflation driven export value growth, as the export volume declined: mackerel, crabs, cod, lobster, prepared and preserved shrimps and prawns, coley and pollack.
- The only species to experience a decline in export value and volume are: scallops, herring and tuna.
- The top four export markets by value, remain the same as in 2016: France, U.S.A., Spain and the Irish Republic.
- The value and volume of seafood exported to the following countries increased: France, U.S.A., Spain, China, South Korea, Belgium, Taiwan, Canada, Portugal and Romania.
- The UK exported less volume but for a higher value to the following countries: Irish Republic, Italy, Netherlands, Germany, Poland, Vietnam, Hong Kong and United Arab Emirates.
- Seafood exports to the following countries decreased by both value and volume: Denmark and Nigeria.

Source: HMRC via British Trade Statistics YE August 2017

Top export species ranked by value 2016 - 2017

Species	Exports YE August 2016			Exports YE August 2017			% Change 2017 v 2016		
	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value	Volume	Ave £ per Kg
Salmon	£543,651	115,993	£4.69	£759,507	122,433	£6.20	39.7%	5.6%	32.4%
Nephrops	£105,566	13,487	£7.83	£119,116	13,673	£8.71	12.8%	1.4%	11.3%
Scallops	£123,507	13,364	£9.24	£110,623	9,283	£11.92	-10.4%	-30.5%	28.9%
Mackerel	£79,522	90,284	£0.88	£91,675	80,940	£1.13	15.3%	-10.3%	28.6%
Crabs	£55,839	16,031	£3.48	£67,958	15,403	£4.41	21.7%	-3.9%	26.7%
WW shrimps & prawns	£49,415	7,444	£6.64	£65,570	8,345	£7.86	32.7%	12.1%	18.4%
Cod	£56,818	17,615	£3.23	£60,057	16,080	£3.73	5.7%	-8.7%	15.8%
Lobster	£41,391	3,543	£11.68	£46,331	3,295	£14.06	11.9%	-7.0%	20.4%
Herring	£36,729	58,079	£0.63	£36,385	40,692	£0.89	-0.9%	-29.9%	41.4%
Monkfish	£22,414	4,177	£5.37	£31,488	5,201	£6.05	40.5%	24.5%	12.8%
P&P shrimps & prawns	£20,258	3,705	£5.47	£22,321	3,485	£6.40	10.2%	-5.9%	17.1%
Tuna	£22,490	6,145	£3.66	£19,974	4,707	£4.24	-11.2%	-23.4%	16.0%
CW shrimps & prawns	£8,399	1,085	£7.74	£14,960	1,880	£7.96	78.1%	73.3%	2.8%
Coley	£11,791	5,332	£2.21	£13,489	5,233	£2.58	14.4%	-1.9%	16.6%
Pollack	£6,204	2,102	£2.95	£6,576	2,083	£3.16	6.0%	-0.9%	7.0%
Haddock	£2,869	950	£3.02	£3,951	1,369	£2.89	37.7%	44.2%	-4.5%
Plaice	£1,127	796	£1.42	£2,262	1,348	£1.68	100.6%	69.3%	18.5%
All others	£306,786	95,950	£3.20	£418,065	111,008	£3.77	36.3%	15.7%	17.8%
Total	£1,494,778	456,082	£3.28	£1,890,308	446,458	£4.23	26.5%	-2.1%	29.2%

Key: :YE – Year Ending, CW - Cold Water, WW - Warm Water, P&P - Prepared and Preserved

Source: HMRC via British Trade Statistics YE Aug 2017

Top 20 export countries ranked by value 2016 - 2017

Country	Exports YE August 2016			Exports YE August 2017			% Change 2017 v 2016		
	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value	Volume	Ave £ per Kg
France	£410,183	88,065	£4.66	£517,099	90,733	£5.70	26.1%	3.0%	22.4%
U.S.A.	£190,130	32,732	£5.81	£267,587	37,391	£7.16	40.7%	14.2%	23.2%
Spain	£151,122	33,815	£4.47	£192,392	41,199	£4.67	27.3%	21.8%	4.5%
Irish Republic	£138,538	40,869	£3.39	£152,533	30,438	£5.01	10.1%	-25.5%	47.8%
China	£79,895	19,161	£4.17	£120,157	21,329	£5.63	50.4%	11.3%	35.1%
Italy	£103,545	18,557	£5.58	£118,150	17,743	£6.66	14.1%	-4.4%	19.3%
Netherlands	£68,014	70,526	£0.96	£82,188	65,772	£1.25	20.8%	-6.7%	29.6%
Germany	£60,134	20,401	£2.95	£72,141	19,213	£3.75	20.0%	-5.8%	27.4%
South Korea	£27,681	3,748	£7.39	£39,075	5,006	£7.81	41.2%	33.6%	5.7%
Belgium	£23,269	4,294	£5.42	£31,742	4,912	£6.46	36.4%	14.4%	19.3%
Denmark	£30,999	18,523	£1.67	£29,996	9,711	£3.09	-3.2%	-47.6%	84.6%
Poland	£23,786	14,560	£1.63	£28,421	11,996	£2.37	19.5%	-17.6%	45.0%
Vietnam	£18,193	10,505	£1.73	£24,765	8,059	£3.07	36.1%	-23.3%	77.4%
Taiwan	£8,044	2,224	£3.62	£18,621	3,224	£5.78	131.5%	45.0%	59.7%
Canada	£7,346	1,629	£4.51	£17,054	3,002	£5.68	132.1%	84.3%	26.0%
Hong Kong	£12,346	1,763	£7.00	£13,124	1,729	£7.59	6.3%	-1.9%	8.4%
Nigeria	£19,108	22,098	£0.86	£11,890	9,592	£1.24	-37.8%	-56.6%	43.4%
Portugal	£9,243	3,783	£2.44	£11,573	4,278	£2.71	25.2%	13.1%	10.7%
United Arab Emirates	£10,022	1,303	£7.69	£11,352	1,210	£9.38	13.3%	-7.1%	22.0%
Romania	£8,247	10,092	£0.82	£11,100	11,590	£0.96	34.6%	14.8%	17.2%
Top 20 total	£1,399,843	418,646	£3.34	£1,770,960	398,127	£4.45	26.5%	-4.9%	33.0%
Top 20 share of total exports	93.6%	91.8%		93.7%	89.2%				

Key: YE - Year Ending

Source: HMRC via British Trade Statistics August 2017

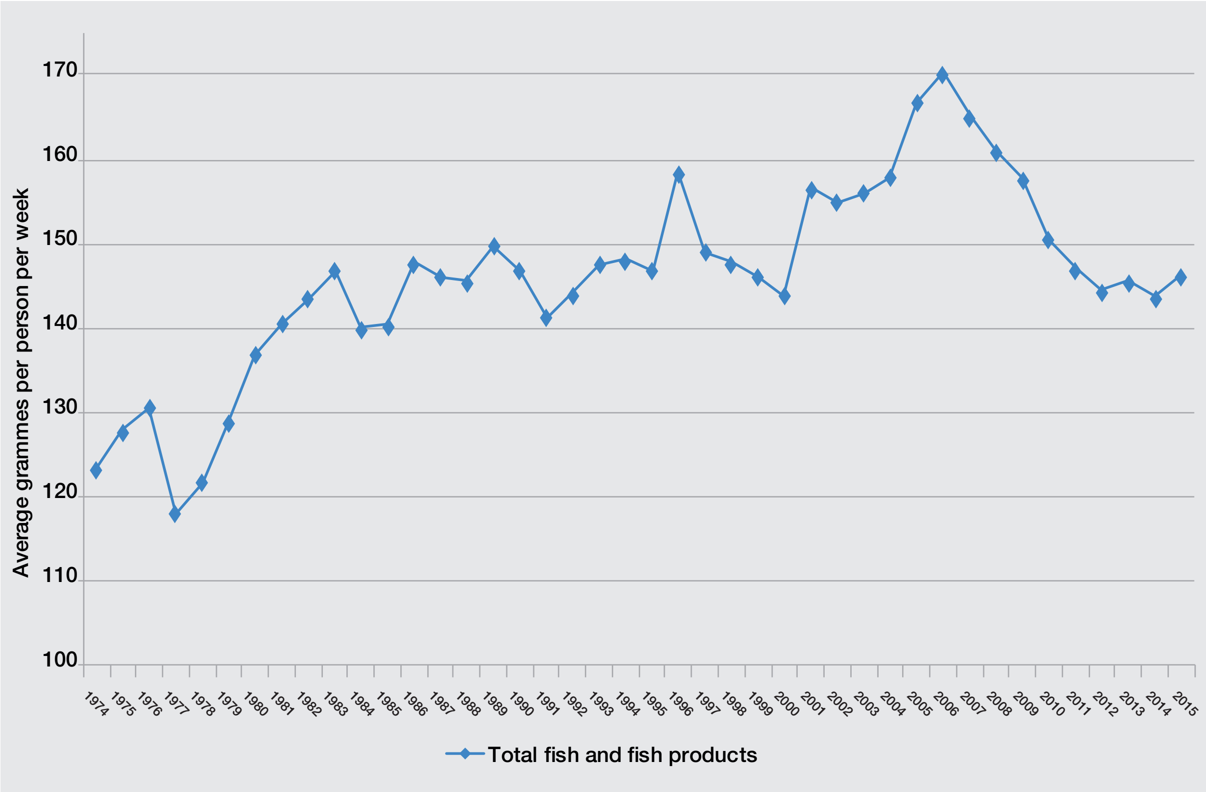
8. Consumers and Consumption

- 72% of UK adults do not know that it is recommended that they eat two portions of fish a week, one of which should be oily[1].
- Almost a third (32%) of UK adults who eat one or less portions of fish a week claim that it is the cost of fish that prevents them from eating more fish[1].
- Of those UK adults who eat at least one portion of fish a week, 43% are doing so as they "try and have a balanced diet" and 35% do so because of the "general health benefits of eating fish" [1].
- Amongst UK adults who eat fish, 47% claim to regularly (at least once a month) eat cod, 39% regularly eat salmon, 37% tuna, 26% haddock and 23% prawns[1].
- Almost a quarter (24%) of UK adults spontaneously (i.e. without prompting) know that omega-3 is one of the health benefits of eating fish. 15% say that it is good for you because it is low in fat and 15% mention fish oils / oils or essential oils. 13% say it is a good source of protein and 11% describe fish as brain food[1].
- When prompted, 50% of UK adults see fish as having healthy heart benefits. 49% say that fish contributes to healthy skin, hair and nails and 48% that it helps contribute to the maintenance of normal brain function. 28% associate fish with maintaining healthy blood pressure and 23% that it helps maintain healthy vision[1].
- When told of the multitude of health benefits of fish, 66% of UK adults agree that they are encouraged to eat more fish than they already do and 78% agree that they feel encouraged to specifically eat two portions of fish a week. This demonstrates that once people are made aware of the many health benefits of eating fish they are encouraged to up their intake[1].
- According to the latest annual retail and foodservice data, over 467,000 tonnes of seafood was purchased by GB consumers, which was 0.4% less than the previous year. Retail sales account for 69% of this volume with over 321,000 tonnes, however this volume fell 2.4% when compared to last year. The number of seafood servings purchased in commercial foodservice increased 4.1% to just over 1bn, and based on an average serving size of 140g, is estimated to account for 146,000 tonnes, 31% of the overall seafood volume purchased by GB consumers[2].
- In 2015, each person in the UK ate an estimated 161g of seafood per week. This amounted to an average of 1.15 portions per person per week (based on a 140g portion size)[3].

Source:
[1] YouGov 2 a Week study December 2016
[2] Nielsen ScanTrack WE 07.10.17, NPD Crest YE June 17
[3] Defra Family Food 2015

Trends in UK household purchases of fish for in-home consumption

Data from 1974 - 2015



Source: DEFRA family food 2015

9. GB Commercial Foodservice Sector

- To year end June 2017, consumers spent £54.4bn on eating out of home, an increase of 2.8% on the previous year. The industry has remained buoyant with a 0.7% increase in visits, a 1.1% increase in the number of servings, and a 2.1% increase in the average diner spend driven by rising prices.

- In the last year all channels except workplace/college/university canteens reported higher sales value. The quick service restaurant channel drove the majority of the sector's growth and out-performed the total market by offering consumers affordable meals out of home. Visits to all channels also increased except to travel & leisure and workplace/college/university outlets.

- Overall Seafood servings and incidence grew this year making it the fourth fastest growing protein in terms of servings and incidence. Consumers spent approximately £3.4bn on eating seafood out of home, an increase of 6.1% on the previous year. Seafood servings increased 4.1% this year, driven by positive performance in all channels, except travel & leisure which saw an 8.3% decline in their seafood servings.

- From June '16 to June'17 the commercial foodservice market has seen a mixed performance across the different species and product formats. Fried fish still dominate, however servings fell 0.9% driven by servings of other fried fish and crab / fish cakes, as servings of fried cod, haddock and fish fingers increased. Overall non-fried fish servings increased 1.1%, thanks to cod, trout and tuna. Shellfish servings also increased 1.4%, driven by mussels, prawns and scampi. Both fish burger and shellfish sandwich servings declined, 13.1% and 3.2% respectively, however servings of fish sandwiches increased 16.5%.

Source: NPD Crest 52 week ending June'17

10. UK Fish and Chip Sector

- There are approximately 10,500 takeaway fish and chip shops in the UK, collectively serving around 103 million servings of fish and chips as a meal, each year.
- It is estimated that in the region of 80,000 people are employed in the takeaway fish and chip shop sector.
- The most popular species of fish consumed via the fish and chip shop sector are cod and haddock, followed by a range of other species such as plaice, hake, coley, whiting, and lemon sole. Many species of shellfish are also increasingly available via fish and chip shops – principally breaded or battered scampi but also species such as scallops and prawns. Haddock is the usual fish of choice in Scotland, Yorkshire, other parts of northern England and many parts of the Midlands – while cod is the usual fish of choice in most other parts of the UK. Plaice is regularly enjoyed by an older demographic of consumer.
- Most (approximately 95%) of the cod sold by UK fish and chip shops is caught in the Arctic waters of the Barents Sea and Iceland. In England, most of the haddock eaten comes from the Barents Sea and Iceland – both of these being supplied in FAS (frozen at sea) fillet format. In Scotland, haddock is much more likely to come from the North Sea via landings into the port of Peterhead.
- The largest ever portion of fish and chips weighed 47.75 kg and was served by Fish and Chips@London Road, Enfield, Middlesex, London on 30 July 2012.
- Popular accompaniments to fish and chip meals include mushy peas, salt and vinegar, tomato ketchup, curry sauce and pickled onions.
- It is estimated that 80% of the UK population visit fish and chip shops at least once a year, while 22% of people visit a fish and chip shop every week. Friday is still the busiest day of the week for most fish and chip shops.
- 56% of UK consumers buy fish and chips from a takeaway outlet to eat in the home as a family meal.
- Fish and chips is one of the least adulterated prepared foods that we can eat; wild caught fish, freshly harvested potatoes, some flour for batter and an oil or fat for the cooking medium.
- A serving of fish and chips provides a third of the recommended daily allowance of vitamins for a man and nearly half for a woman. A portion of fish and chips provides the body with carbohydrate, vitamins B6 and B12, vitamin C, iron, calcium, phosphorous, as well as the trace elements iodine, fluorine, zinc and some important dietary fibre.

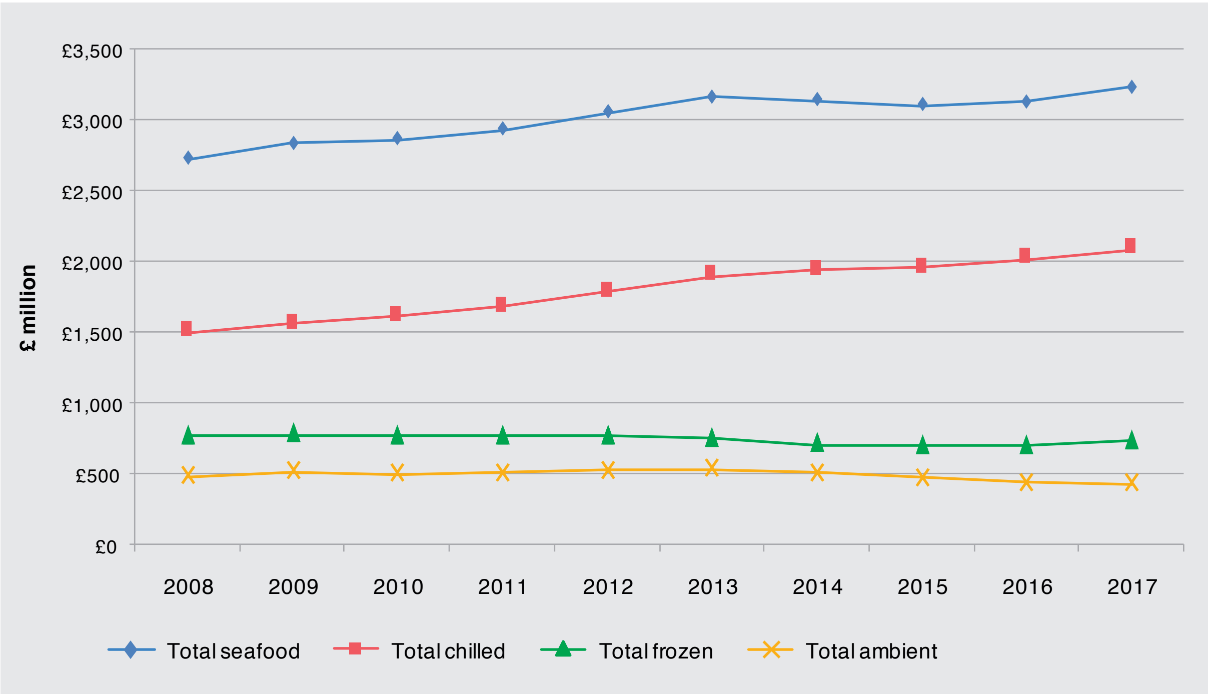
Source: Seafish

11. GB Retail Sector

- In the year ending 7 October 2017, we bought over 321,000 tonnes of seafood for £3.22bn from the major multiple supermarkets in GB.
- When compared to the previous year, overall volume declined 2.4% which equates to more than 7,800 tonnes. However, continued price inflation has increased the average price per kg 5.7% to £10.03, resulting in 3.2%, almost £100m value growth.
- With over £2bn of sales, the chilled sector dominates the category. However volume sales declined 1% to just over 151,700 tonnes, whilst the sales value increased 3.8%, as the average price per kg paid for chilled fish increased 4.8%.
- Only the frozen sector is reporting growth of both sales value and volume. Value sales increased 4.4% to just over £700m and volume increased 0.4% to over 105,300 tonnes. The disparity in growth rates is a result of the average price per kg paid increasing 4.1% to £6.83.
- The ambient sector (shelf stable tins, jars, pouches) is also reporting an 8.9% increase in the average price paid per kg which is now £6.62, however the sector remains in overall decline. Sales value fell 1.4% to just over £420m and volume sales are 9.4% lower than the previous year at just over 64,100 tonnes.
- The 35 top species by sales value remain the same as last year with salmon, cod, tuna, warm-water prawns, haddock and cold-water prawns maintaining their top six rankings. In fact the only species which have changed their ranks are: mackerel +1, pollock -1, basa +1, scampi -1, sea bream +1, scallops -1, squid (calamari) +1, anchovy +1, lobster -2, pilchards +1, cockles +1, shrimps +2, crayfish -3 and monkfish -1.
- By overall volume, the two largest product segments within retail are natural (seafood with no additional ingredients) and prepared (seafood prepared by any other means not specified by the other segments). Combined these account for just below 55% of all sales, however they are experiencing a decline along with sauce and breaded segments. The segments that are reporting an increase in sales volume are meals, fingers, batter, cakes, sushi and dusted.

Source: Nielsen ScanTrack YE 07.10.17

GB seafood retail sales value by sector 2008 - 2017



Source: AC Nielsen ScanTrack 22.01.11, 07.12.13, 05.11.16, 07.10.17

Top 35 species by value and volume

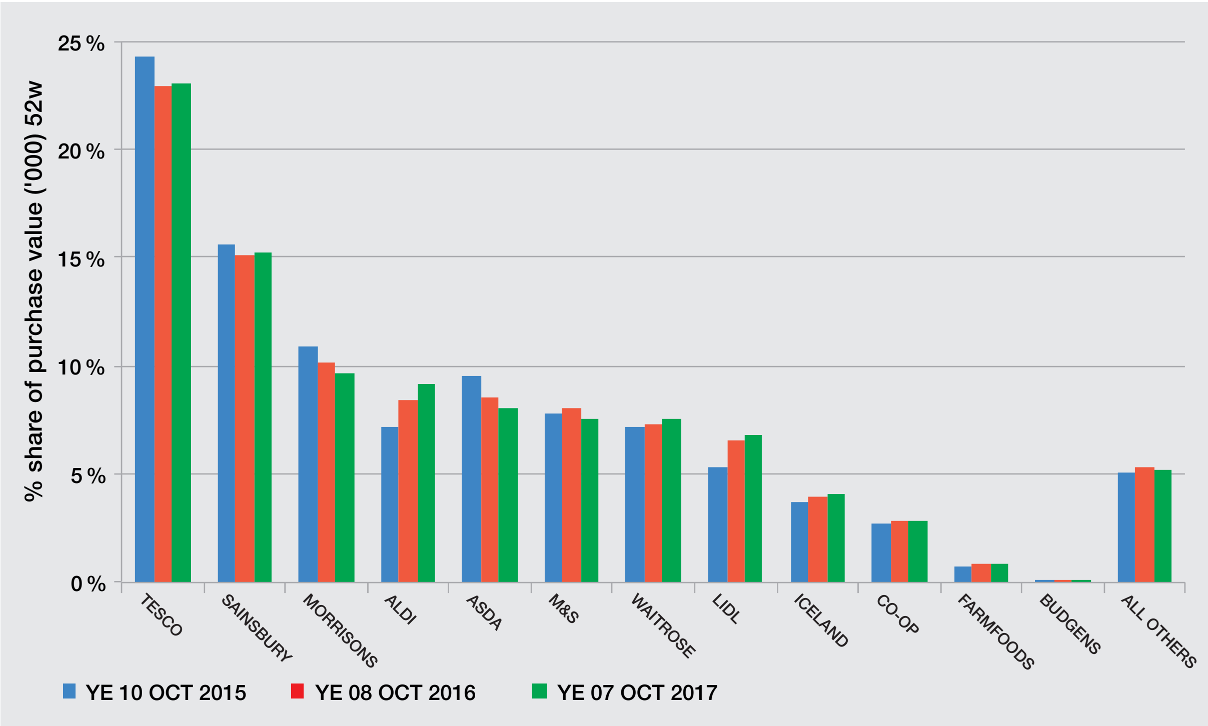
		Value Sales ('000)			Volume Sales ('000 kg)			% Change 2017 v 2016	
	Rank	YE 10.10.15	YE 08.10.16	YE 07.10.17	YE 10.10.15	YE 08.10.16	YE 07.10.17	Value	Volume
Total seafood		£3,093,367	£3,121,247	£3,221,144	328,673	328,968	321,141	3.2	-2.4
Salmon	1	£866,768	£870,350	£901,843	55,555	58,088	52,847	3.6	-9.0
Cod	2	£358,527	£379,200	£399,022	44,504	47,103	48,591	5.2	3.2
Tuna	3	£334,736	£314,852	£319,188	54,615	53,153	48,462	1.4	-8.8
Warm-water prawns	4	£231,119	£257,500	£269,568	15,138	17,612	18,728	4.7	6.3
Haddock	5	£185,309	£195,266	£205,618	18,188	19,422	20,223	5.3	4.1
Cold-water Prawns	6	£179,650	£179,427	£173,553	15,157	14,080	13,277	-3.3	-5.7
Mixed seafood	7	£132,848	£142,716	£159,162	15,596	16,461	17,738	11.5	7.8
Mackerel	8	£111,613	£104,424	£105,423	15,113	14,164	13,865	1.0	-2.1
Pollock	9	£132,020	£105,533	£105,136	28,903	24,188	24,081	-0.4	-0.4
Other	10	£98,702	£90,869	£89,199	17,850	15,559	14,257	-1.8	-8.4
Sea bass	11	£45,782	£53,311	£58,005	3,069	3,364	3,529	8.8	4.9
Basa	12	£39,091	£44,566	£49,228	5,084	5,787	5,994	10.5	3.6
Scampi	13	£43,987	£46,622	£46,935	4,209	4,356	4,209	0.7	-3.4
Trout	14	£34,451	£34,040	£35,230	3,092	2,965	2,821	3.5	-4.9
Sardines	15	£29,318	£28,723	£29,122	5,641	5,572	5,392	1.4	-3.2
Plaice	16	£27,748	£28,395	£28,079	2,780	2,871	2,920	-1.1	1.7
Crab	17	£26,401	£28,109	£27,728	1,444	1,550	1,431	-1.4	-7.7
Sole	18	£27,757	£27,700	£27,445	2,235	2,223	2,100	-0.9	-5.5
Crabstick	19	£24,091	£22,359	£25,284	4,892	4,808	5,317	13.1	10.6
Mussels	20	£21,146	£20,884	£22,511	3,388	3,368	3,593	7.8	6.7
Sea bream	21	£13,229	£16,014	£16,700	918	1,067	1,096	4.3	2.7
Scallops	22	£19,096	£17,434	£16,357	884	798	755	-6.2	-5.4
Kipper	23	£15,248	£14,353	£13,729	2,010	1,885	1,676	-4.3	-11.1
Squid (calamari)	24	£10,737	£11,118	£11,996	769	787	756	7.9	-4.0
Anchovy	25	£10,624	£10,398	£10,678	615	635	638	2.7	0.5
Lobster	26	£8,430	£11,628	£9,960	320	449	372	-14.3	-17.2
Herring	27	£8,558	£8,554	£8,609	1,297	1,324	1,265	0.6	-4.4
Hake	28	£7,127	£7,309	£7,856	687	639	624	7.5	-2.3
Pilchards	29	£6,782	£6,115	£5,890	2,172	1,983	1,941	-3.7	-2.1
Cockles	30	£6,275	£5,421	£5,551	580	538	506	2.4	-5.9
Shrimps	31	£3,986	£4,025	£4,587	101	115	170	14.0	48.7
Crayfish	32	£5,156	£6,203	£4,446	215	258	173	-28.3	-32.9
Monkfish	33	£4,814	£4,719	£4,124	115	108	85	-12.6	-21.0
Swordfish	34	£2,676	£2,864	£2,730	118	107	91	-4.7	-15.3
Skate/ray	35	£2,248	£2,393	£2,355	78	85	79	-1.6	-7.0

Key: YE - Week Ending

Source AC Nielsen ScanTrack YE 07.10.17

Share of trade value between major GB retailers – total seafood

Total seafood – 52 week - share of trade by value



Source: Nielsen HomeScan YE 07.10.17

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