SEAFOOD INDUSTRY **FACTSHEET**

MARCH 2017

the authority on seafood

Segments

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 £6.24bn which is 1.3% more than the previous year.

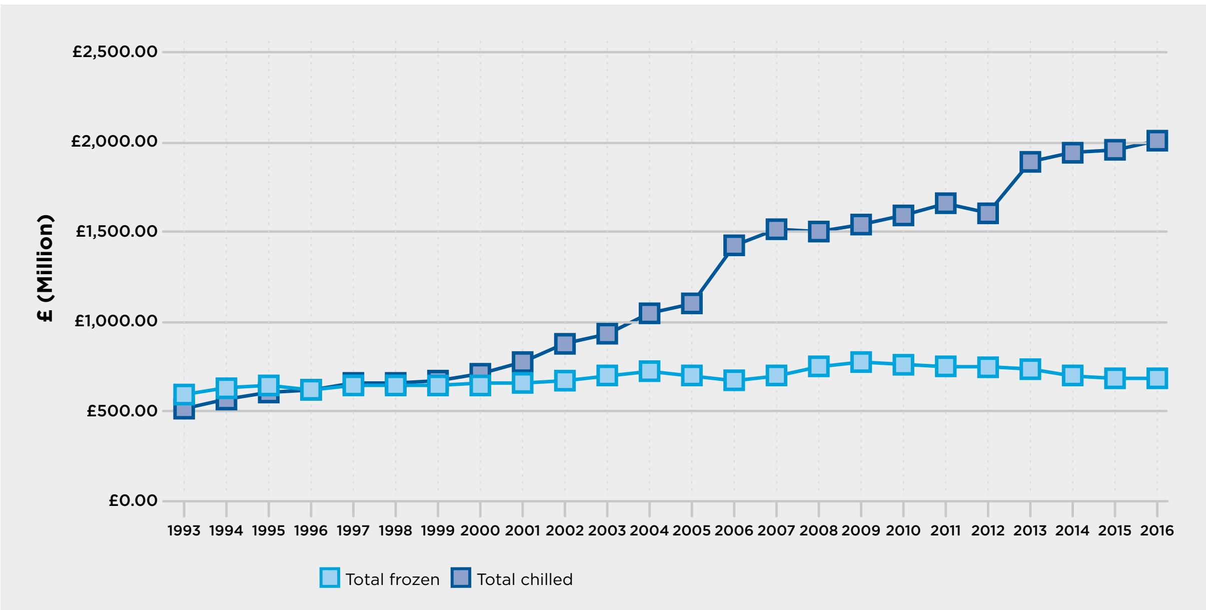
*Nielsen data year ending 5 Nov 2016, Crest data year ending Sept 2016.
Source: Nielsen Scan Track and NPD Crest

2. UK Retail Sector

- In the last year, ending 5 November 2016, we bought 329,592 tonnes of seafood for £3.13b.
- Overall volume increased by 875 tonnes, 0.3% when compared to Year End 7 November 2015. This growth was accompanied by overall price per kg inflation of 0.8% to £9.49 per kg, driving sales value growth of 1%, £32.5m.
- Only the chilled sector experience growth of volume 3.7%, 5,570 tonnes and value sales 3.1%, £61.2m but slight price deflation of 0.6% to £13.03 per kg. The frozen sector saw sales value growth of 0.5%, £3.2m driven by 2.3% inflation as sales volume declined 1.8%, 1,949 tonnes. Whilst ambient (shelf stable tins, jars, pouches) sales value declined 7.0%, £31.9m due to volume declined 3.8%, 2,746 tonnes compounded by price deflation of 3.3% bringing price per kg to £6.08.
- The top species by sales value remain the same as the previous year with salmon, cod, tuna, warm-water prawns, haddock and cold-water prawns maintaining their positions. The only species which have changed their ranking positions are: crab +1, sole -1, sea-bream +1, kipper -1, lobster +2, squid (calamari) -1, anchovy -1, crayfish +2, pilchards -1, cockles -1.

Source: AC Nielsen ScanTrack YE 05.11.16

Chilled vs frozen seafood retail sales 1993 - 2016



Source: Nielsen ScanTrack

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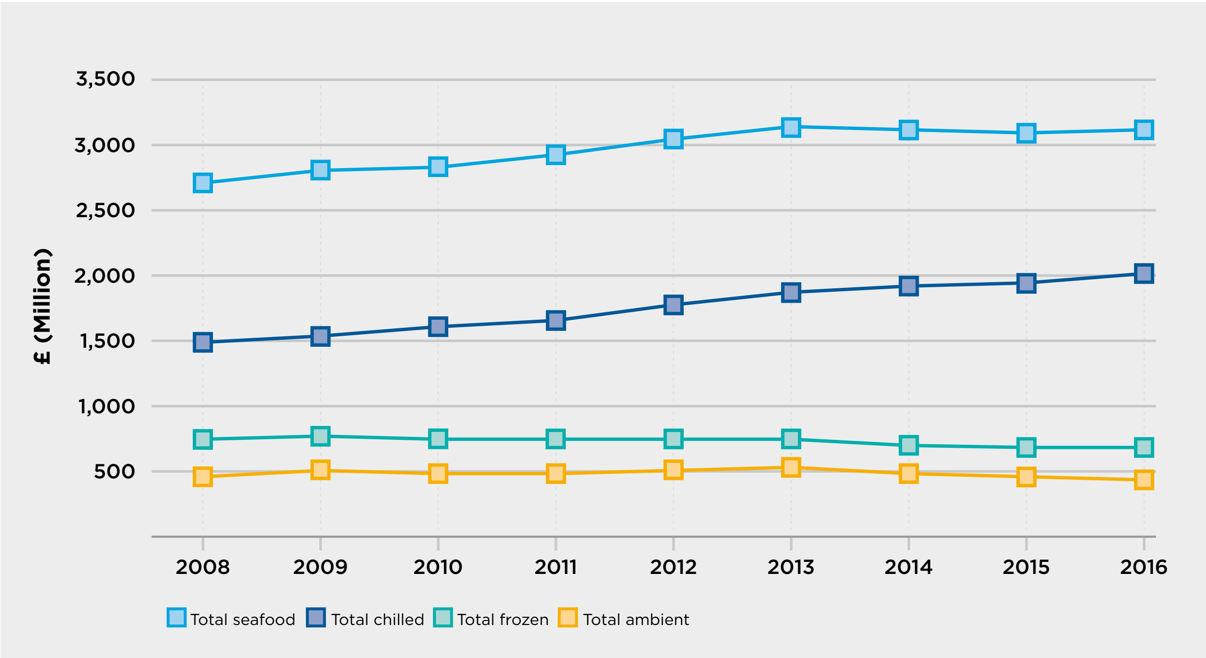
Top 35 species by value and volume

Key:
YA – Year Ago WE - Week Ending

	Rank	Value Sales ('000)			Volume Sales ('000 kg)			MAT % Chg YA	
		WE 08.11.14	WE 07.11.15	WE 05.11.16	WE 08.11.14	WE 07.11.15	WE 05.11.16	Value	Volume
Total seafood		£3,127,194	£3,094,629	£3,127,112	334,698	328,717	329,592	1.0	0.3
Salmon	1	£853,374	£868,336	£871,714	53,497	55,864	58,129	0.4	4.1
Cod	2	£354,277	£360,636	£379,632	43,505	44,849	47,263	5.3	5.4
Tuna	3	£356,803	£332,807	£314,193	54,680	54,647	52,920	-5.6	-3.2
Warm-water prawns	4	£214,664	£232,938	£258,911	14,182	15,317	17,840	11.2	16.5
Haddock	5	£197,442	£185,006	£197,017	19,784	18,109	19,695	6.5	8.8
Cold-water prawns	6	£191,015	£179,042	£179,616	17,932	14,994	14,034	0.3	-6.4
Mixed seafood	7	£127,203	£133,135	£144,338	14,982	15,587	16,617	8.4	6.6
Pollock	8	£163,417	£128,715	£104,967	34,412	28,288	24,159	-18.5	-14.6
Mackerel	9	£114,557	£111,161	£103,960	14,603	15,126	14,122	-6.5	-6.6
Other	10	£108,033	£98,681	£90,237	19,505	17,782	15,435	-8.6	-13.2
Sea bass	11	£39,320	£46,746	£53,683	2,737	3,125	3,385	14.8	8.3
Scampi	12	£45,508	£44,064	£46,660	4,400	4,185	4,364	5.9	4.3
Basa	13	£33,812	£39,454	£44,964	4,192	5,122	5,850	14.0	14.2
Trout	14	£34,710	£34,417	£34,276	3,209	3,091	2,975	-0.4	-3.7
Sardines	15	£32,169	£29,265	£28,631	5,724	5,639	5,529	-2.2	-2.0
Plaice	16	£27,836	£28,089	£28,221	2,907	2,814	2,854	0.5	1.4
Crab	17	£23,196	£26,651	£28,209	1,212	1,480	1,564	5.8	5.7
Sole	18	£29,946	£27,774	£27,421	2,443	2,228	2,198	-1.3	-1.3
Crabstick	19	£25,357	£23,841	£23,229	5,320	4,899	5,024	-2.6	2.6
Mussels	20	£21,065	£20,865	£21,154	3,494	3,335	3,404	1.4	2.1
Scallops	21	£17,193	£19,106	£17,304	820	878	796	-9.4	-9.3
Sea bream	22	£10,990	£13,465	£16,138	835	929	1,073	19.9	15.6
Kipper	23	£15,015	£15,251	£14,273	1,995	2,020	1,865	-6.4	-7.7
Lobster	24	£4,749	£8,772	£11,580	138	338	443	32.0	30.9
Squid (calamari)	25	£9,198	£10,841	£11,087	577	770	773	2.3	0.4
Anchovy	26	£10,891	£10,607	£10,398	599	618	635	-2.0	2.7
Herring	27	£9,028	£8,556	£8,517	1,350	1,301	1,315	-0.5	1.1
Hake	28	£5,860	£7,047	£7,222	545	674	629	2.5	-6.6
Crayfish	29	£3,627	£5,243	£6,164	163	219	255	17.6	16.3
Pilchards	30	£7,888	£6,725	£6,065	2,418	2,160	1,971	-9.8	-8.8
Cockles	31	£6,470	£6,194	£5,416	639	570	545	-12.6	-4.3
Monkfish	32	£4,655	£4,809	£4,706	126	114	107	-2.1	-6.4
Shrimps	33	£4,055	£3,990	£4,043	93	103	115	1.3	11.9
Swordfish	34	£2,581	£2,703	£2,850	80	120	105	5.4	-12.3
Skate/ray	35	£2,545	£2,292	£2,387	87	80	84	4.1	5.5

Source AC Nielsen ScanTrack WE 05.11.16

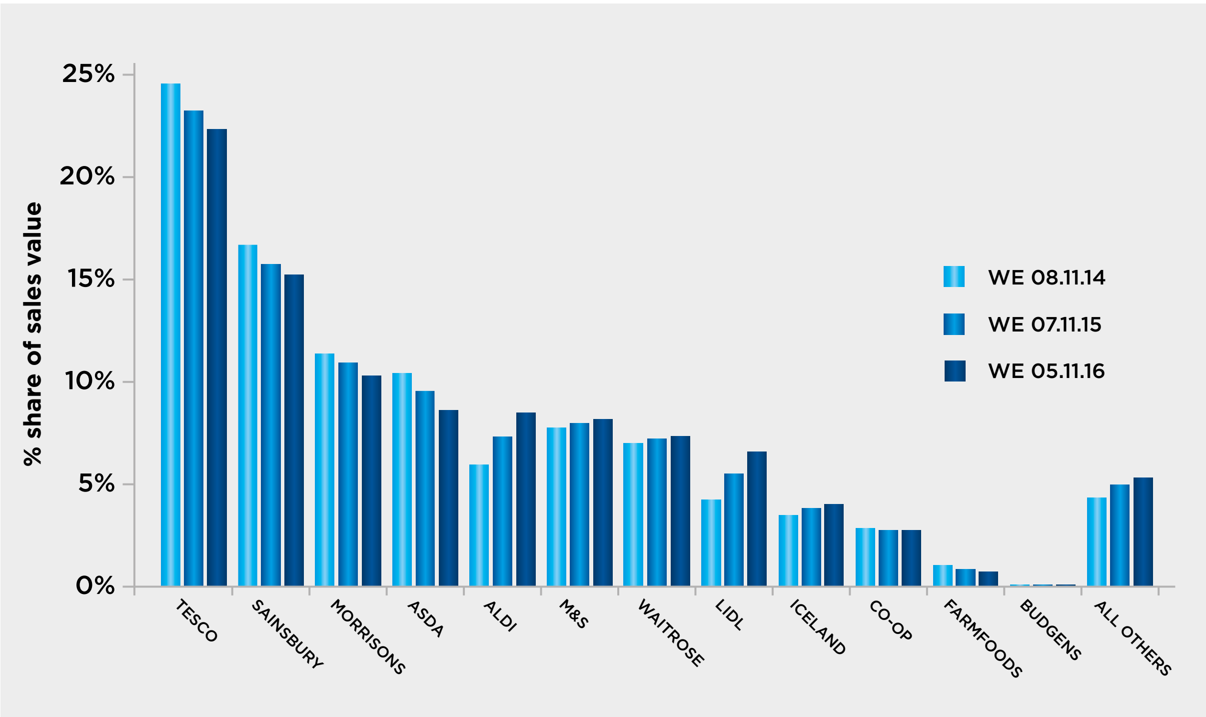
Seafood sales 2008 - 2016



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

Share of trade between major retailers – total fish

Total fish – 52 week - share of trade by value



Source: AC Nielsen ScanTrack we 05.11.16

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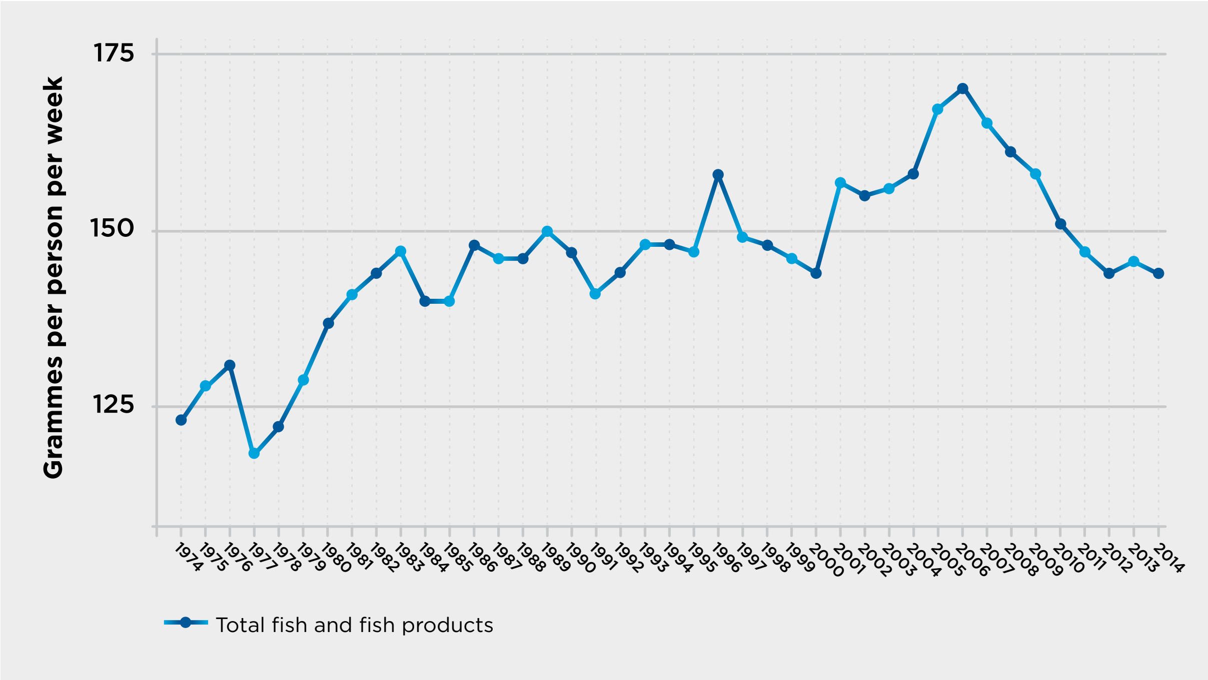
3. Consumers and Consumption

- 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 ever 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].
- The top five seafood species in the 52 weeks to 21 May 2016 in retail by volume were salmon, cod, tuna, warm-water prawns and haddock[2].
- Over the long term (eight years to 21 May 2016) out of the top ten species only salmon, warm-water prawns, mixed seafood pollock and seabass were in true growth. Traditional species like cod, tuna, haddock, cold-water prawns and mackerel were in volume decline[2].
- Salmon consumption has continued to grow over the past eight years despite a 36% increase in price[2].
- In retail chilled seafood was the only seafood sector consistently in growth throughout austerity. In the eight years to 21 May 2016 chilled seafood value grew by 29% and volume by 10%. In the same period frozen seafood value fell by -5% and volume by -22% and ambient seafood fell by -7.8% by value and -37% by volume[2].
- The market share of chilled seafood in the year to 21 May 2016 by volume was 46% and 64% by value followed by frozen and ambient[2].
- A variety of sources place seafood consumption in GB at 8.2kg per person per year. This would extrapolate to 8.5kg per person per year for the UK[2].

Source:
[1] YouGov 2 a Week study December 2016
[2] Seafood Consumption factsheet October 2016

Trends in UK household purchases of fish Data from 1974 - 2014



Source: DEFRA Family Food 2014

4. UK Seafood Industry

- In 2015, there were 6,553 registered fishing vessels, a reduction of 5% since 2006. Of these vessels 2,017 are classified as inactive and 1,710 are classified as 'low activity', referring to vessels with average landings of less than £10,000 per year.
- Excluding inactive vessels, the fleet in 2015 comprised 3,301 vessels under 10m in length and 1,235 over 10m.
- There were an estimated 12,107 fishermen in the UK in 2015, down 6% since 2005. Of these, 5,569 were based in England, 851 in Wales, 4,828 in Scotland and 859 in Northern Ireland. Part-time fishermen accounted for 16 percent of the total, down 2% since 2005.

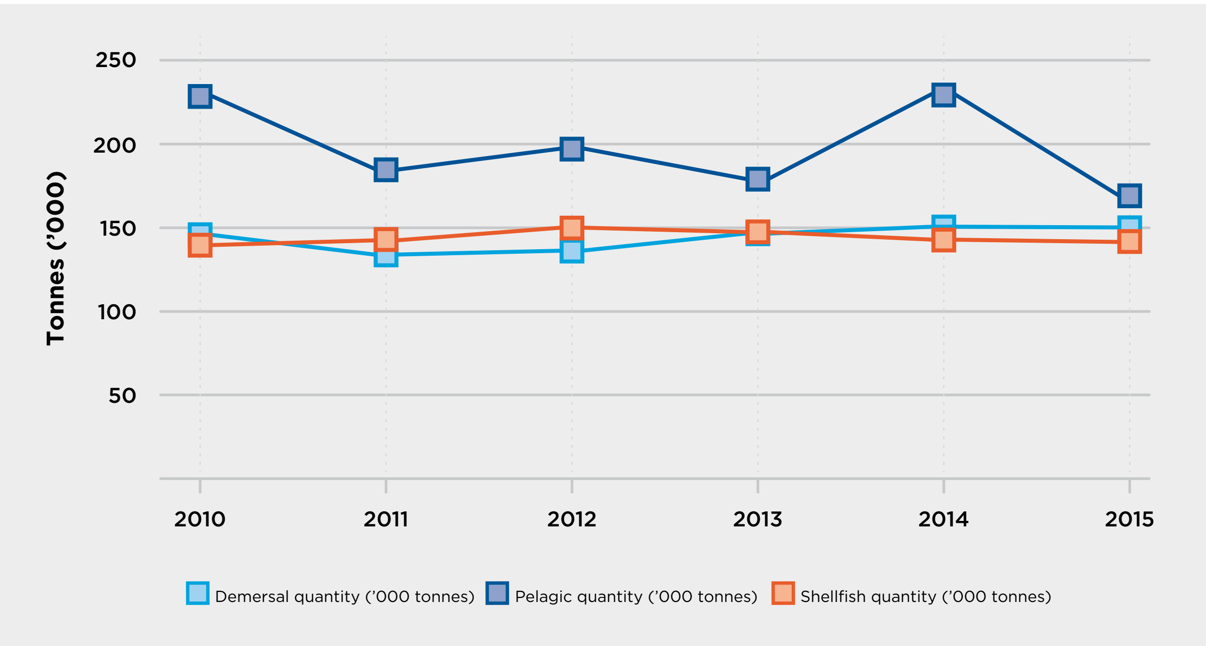
Source: UK Sea Fisheries Annual Statistics Report 2015 (MMO)

UK Landings

- In 2015, UK vessels landed 708,000 tonnes of seafood into the UK and abroad with a value of £775 million. Compared with 2014, this represents a 7% decrease in quantity and a 10% decrease in value and was mainly driven by the pelagic sector. Average first sale price of demersal (whitefish and flatfish) and shellfish species fell 2% and 5% respectively between 2014 and 2015, while the price of pelagic (oily) species fell 15%.
- 60% of fish caught by the UK fleet was landed in the UK. Landings in the UK made up 71% of fishing income for UK vessels.
- By quantity landed, pelagic species accounted for around 55% of all landings by UK boats in 2015, with demersal fish and shellfish making up around 24% and 21% respectively. The quantity of pelagic fish landed decreased by 11% between 2014 and 2015. Demersal and shellfish landings were largely static in 2014 and 2015.
- By value, demersal fish accounted for almost 40% of total landings with shellfish comprising just over 35 and pelagic fish at 27%.

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

UK landings by UK and foreign vessels 2010 - 2015



Source: MMO: UK Sea Fisheries Statistics 2015 - Landings

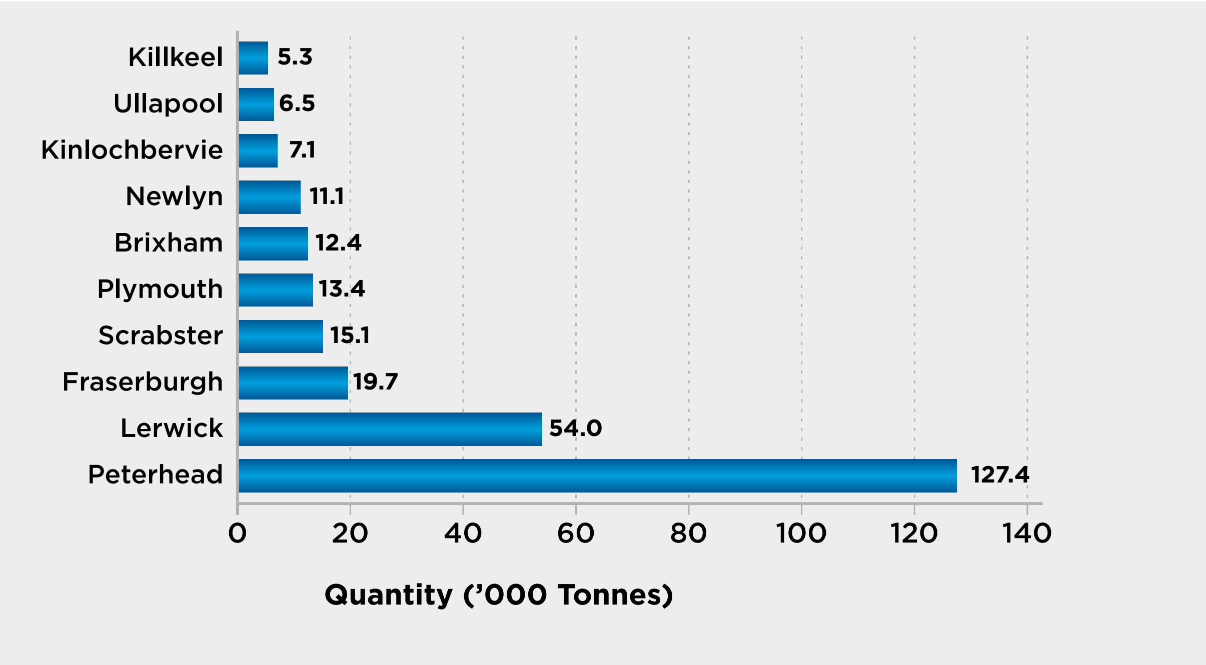
Landings into the UK by UK vessels: 2011 to 2015 (a)

	Quantity ('000 tonnes)					Value (£ million)				
	2011	2012	2013	2014	2015	2011	2012	2013	2014	2015
Bass	0.7	0.8	0.8	1.0	0.6	5.4	5.6	5.6	7.3	5.3
Brill	0.3	0.3	0.3	0.3	0.3	1.7	1.6	1.6	1.6	1.6
Cod	12.7	12.7	13.0	14.0	15.4	27.5	24.9	25.8	27.8	29.5
Dogfish	0.5	0.6	0.7	0.6	1.6	0.1	0.1	0.2	0.1	0.3
Gurnard	1.5	1.8	1.8	1.3	1.6	1.1	1.2	1.2	0.9	1.0
Haddock	28.3	34.0	38.7	35.4	32.4	34.6	35.7	43.5	49.4	44.2
Hake	6.7	6.5	6.5	8.5	8.8	12.5	13.5	16.1	19.7	20.9
Halibut	0.1	0.1	..	..	0.1	0.9	0.6	0.5	0.3	0.4
Lemon sole	1.6	2.5	2.5	2.3	1.8	5.9	6.7	7.6	7.9	7.3
Ling	4.2	4.1	4.0	4.4	4.1	6.2	5.6	5.5	5.4	5.3
Megrim	3.2	3.3	4.0	3.3	3.1	10.5	8.7	9.1	8.6	7.6
Monks or anglers	11.8	10.3	10.1	11.4	14.3	39.5	31.9	30.3	31.4	34.8
Plaice	3.0	3.4	4.1	3.5	3.5	3.6	3.7	4.0	3.6	3.6
Pollack (lythe)	1.9	1.8	1.6	1.9	1.6	4.4	3.9	3.4	3.4	3.1
Saithe	12.7	11.0	12.9	11.1	9.9	13.4	11.3	11.0	10.2	8.5
Sand eels	..	..	..	..	..	..	..	..	..	..
Skates and rays	2.7	2.6	2.6	2.4	2.4	3.9	3.5	3.3	2.7	2.8
Sole	1.9	1.7	1.8	1.8	1.4	16.3	13.9	12.7	12.4	10.3
Turbot	0.4	0.5	0.4	0.5	0.5	4.2	3.6	3.7	4.2	4.2
Whiting	9.7	10.8	12.0	11.1	10.7	11.3	10.9	11.5	11.8	11.0
Witch	0.8	0.9	0.8	0.8	0.6	1.1	1.1	0.8	0.7	0.7
Other demersal (b)	3.9	3.4	3.9	4.2	3.4	5.8	4.8	5.5	5.7	6.2
TOTAL DEMERSAL	108.5	112.9	122.6	119.9	118.3	209.8	193.0	202.9	215.2	208.8
Blue whiting	1.3	6.4	8.2	9.7	12.1	0.6	1.8	1.8	1.3	2.0
Herring	31.3	38.2	37.5	38.3	38.6	15.3	18.6	13.6	10.5	13.4
Horse mackerel	8.9	8.9	2.5	3.1	2.9	3.1	2.8	0.9	1.1	1.3
Mackerel	94.4	67.8	78.2	128.2	94.8	106.8	63.8	70.1	105.5	60.6
Sardines	3.5	4.3	3.7	3.4	4.2	0.9	1.1	1.0	0.8	1.6
Other pelagic	4.8	6.8	4.8	5.7	3.8	1.1	1.5	1.0	2.1	0.8
TOTAL PELAGIC	144.3	132.3	134.9	188.4	156.4	127.7	89.5	88.4	121.4	79.6
Cockles	3.2	2.2	10.1	10.2	11.2	2.7	1.5	5.3	7.9	5.7
Crabs	28.8	29.7	29.1	32.5	29.1	38.4	38.6	38.9	44.2	39.2
Cuttlefish	3.3	5.3	3.7	3.1	6.0	8.8	10.7	6.5	6.5	10.6
Lobsters	3.2	3.1	3.0	3.4	3.1	32.4	31.0	29.9	33.3	32.1
Mussels	1.9	0.7	0.5	0.2	1.0	0.2	0.4	0.2	0.1	0.8
Nephrops	34.3	32.6	28.3	30.3	25.7	111.1	110.4	86.0	98.2	81.8
Scallops	53.0	53.6	48.7	38.5	40.7	62.8	67.4	62.6	58.2	64.0
Shrimps and prawns	0.4	1.0	0.9	0.6	0.3	0.7	2.4	2.4	1.4	0.8
Squid	2.9	1.8	1.8	2.9	1.8	11.6	6.4	7.0	9.2	6.4
Whelks	13.9	16.4	20.0	19.7	20.9	8.9	11.1	13.7	16.2	18.6
Other shellfish	2.5	2.4	1.8	1.1	1.3	5.6	6.1	5.4	3.6	4.0
TOTAL SHELLFISH	147.4	148.8	147.9	142.5	141.0	283.3	286.0	257.8	278.8	264.0
TOTAL ALL SPECIES	400.2	394.0	405.4	450.8	415.7	620.8	568.6	549.0	615.4	552.4

Source: MMO: The Fishing Industry In 2015 - Landings (a) Landings data include transhipments and Islands figures. (b) Includes fish roes and livers.

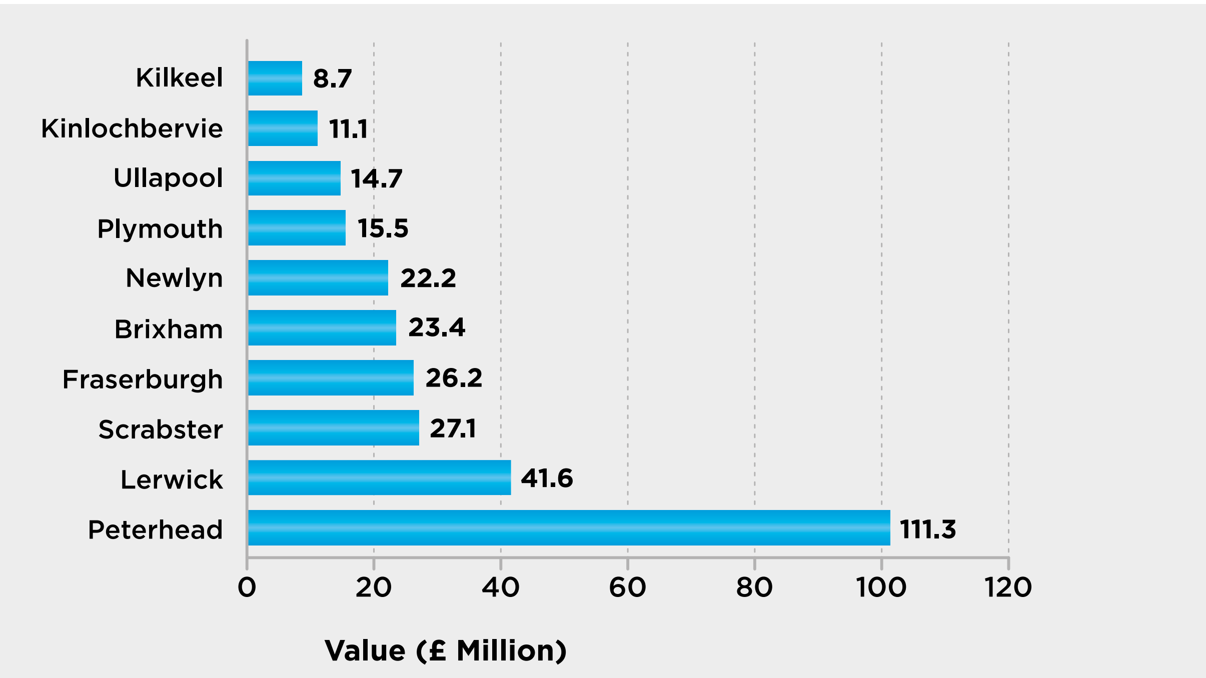
6 UK Ports

Top 10 UK ports – landings by UK vessels: 2015 By volume



Source: MMO: UK Sea Fisheries Statistics 2015 - Landings

Top 10 UK ports – landings by UK vessels: 2015 By value



Source: MMO: UK Sea Fisheries Statistics 2015 - Landings

7

UK Seafood Imports

- In the UK* approximately 66% of the seafood value, 52% of the seafood volume which enters the supply chain is imported from abroad or landed by foreign ships
- Within the last year a total of 717,583 tonnes of seafood worth £2.9bn was imported which was 4.1% more in terms of volume and 7.6% more in terms of value in comparison to 2015.
- The average price per kg of imported seafood has increased by 3.3% from £3.91 in 2015 to £4.03 in Sept 2016.
- In terms of species import values, with 21.1% sales growth salmon has reclaimed first position from cod which experienced 8.9% growth and tuna has maintained its third position with 0.4% growth in sales value. The other species that have experienced changes in value of more than 10% are: scallops (85.9%), lobster (27.1%) and monkfish (+18.7%) whilst nephrops (-18.9%), crabs (-15.3%) and cold water prawns (-15%) imports have declined.
- These shifts in species is reflected in the performance of the countries who import to the UK. Looking at the top importing counties by value, Iceland has maintained its number one position, the Faroe Islands are now in second place (was sixth last year). Germany has maintained their third position, whilst China is now fourth (was second last year), and fifth position is still held by Denmark. Vietnam increased their imports moving up one place to sixth, whilst Sweden has moved two places and is now the seventh largest importer. Canada's imports fell moving them down four places to eight. The Netherlands improved their position to ninth (from tenth last year) and India is now ranked tenth which is two places higher than 2015.

* Source: Marine Management Organisation 2015, finalised 2015 trade data from HMRC via BTS, Cefas 2013-2014 data converted to £s and not adjusted for inflation

Top import species 2015 - 2016

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

Species	Import YE September 2015			Import YE September 2016			% Change YE Sept 2016 v 2015		
	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value	Volume	Ave £ per Kg
Salmon	£391,495	79,952	£4.90	£474,559	88,788	£5.34	21.2%	11.1%	9.2%
Cod	£433,691	114,407	£3.79	£472,399	118,729	£3.98	8.9%	3.8%	5.0%
Tuna	£358,553	115,488	£3.10	£359,830	118,831	£3.03	0.4%	2.9%	-2.5%
P&P shrimps & prawns	£306,071	39,038	£7.84	£305,465	39,716	£7.69	-0.2%	1.7%	-1.9%
WW shrimps & prawns	£284,646	37,669	£7.56	£296,742	39,237	£7.56	4.2%	4.2%	0.1%
Haddock	£120,198	38,569	£3.12	£116,194	46,149	£2.52	-3.3%	19.7%	-19.2%
Pollack	£60,463	31,052	£1.95	£65,998	32,273	£2.05	9.2%	3.9%	5.0%
Scallops	£24,947	2,100	£11.88	£46,365	4,318	£10.74	85.9%	105.6%	-9.6%
Mackerel	£45,087	27,188	£1.66	£40,879	20,681	£1.98	-9.3%	-23.9%	19.2%
Lobster	£30,347	2,645	£11.47	£38,573	2,973	£12.97	27.1%	12.4%	13.1%
Crabs	£20,891	2,459	£8.50	£17,703	2,304	£7.68	-15.3%	-6.3%	-9.6%
CW shrimps & prawns	£19,030	2,573	£7.40	£16,179	2,254	£7.18	-15.0%	-12.4%	-2.9%
Herring	£14,599	8,678	£1.68	£15,668	10,711	£1.46	7.3%	23.4%	-13.0%
Plaice	£11,668	4,075	£2.86	£12,753	4,487	£2.84	9.3%	10.1%	-0.7%
Nephrops	£11,767	3,188	£3.69	£9,542	2,861	£3.34	-18.9%	-10.2%	-9.6%
Coley	£7,311	2,290	£3.19	£7,996	2,575	£3.11	9.4%	12.4%	-2.7%
Monkfish	£4,935	1,346	£3.67	£5,859	1,714	£3.42	18.7%	27.4%	-6.8%
All Others	£546,222	176,577	£3.09	£592,735	178,982	£3.31	8.5%	1.4%	7.1%
Total Imports	£2,691,921	689,294	£3.91	£2,895,438	717,583	£4.03	7.6%	4.1%	3.3%

Source: HMRC via British Trade Statistics YE September 2016

Top 20 import countries 2015 - 2016

Key: YE - Year Ending

Country	Imports YE September 2015			Imports YE September 2016			% Change YE September		
	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value	Volume	Ave £ per Kg
Iceland	£261,941	57,263	£4.57	£288,975	63,606	£4.54	10.3%	11.1%	-0.7%
Faroe Islands	£144,632	34,988	£4.13	£200,501	41,362	£4.85	38.6%	18.2%	17.3%
Germany	£174,872	50,585	£3.46	£198,686	53,795	£3.69	13.6%	6.3%	6.8%
China	£186,690	66,744	£2.80	£191,325	64,739	£2.96	2.5%	-3.0%	5.7%
Denmark	£150,080	41,330	£3.63	£152,841	39,711	£3.85	1.8%	-3.9%	6.0%
Vietnam	£122,450	28,595	£4.28	£139,613	30,245	£4.62	14.0%	5.8%	7.8%
Sweden	£105,600	26,984	£3.91	£126,677	30,379	£4.17	20.0%	12.6%	6.6%
Canada	£151,049	18,947	£7.97	£117,226	14,978	£7.83	-22.4%	-20.9%	-1.8%
Netherlands	£102,026	25,168	£4.05	£111,795	26,173	£4.27	9.6%	4.0%	5.4%
India	£92,279	16,728	£5.52	£99,135	17,722	£5.59	7.4%	5.9%	1.4%
Norway	£85,845	31,820	£2.70	£94,570	35,222	£2.68	10.2%	10.7%	-0.5%
U.S.A.	£98,122	22,297	£4.40	£89,845	21,660	£4.15	-8.4%	-2.9%	-5.7%
Thailand	£110,476	25,846	£4.27	£88,484	20,542	£4.31	-19.9%	-20.5%	0.8%
France	£61,226	11,449	£5.35	£79,904	12,980	£6.16	30.5%	13.4%	15.1%
Bangladesh	£62,064	7,698	£8.06	£70,560	7,493	£9.42	13.7%	-2.7%	16.8%
Poland	£59,800	14,964	£4.00	£67,756	16,902	£4.01	13.3%	13.0%	0.3%
Indonesia	£66,003	14,603	£4.52	£66,240	12,734	£5.20	0.4%	-12.8%	15.1%
Spain	£56,438	14,352	£3.93	£64,114	14,325	£4.48	13.6%	-0.2%	13.8%
Ghana	£52,542	15,495	£3.39	£61,974	22,022	£2.81	18.0%	42.1%	-17.0%
Seychelles	£62,456	17,339	£3.60	£60,459	21,446	£2.82	-3.2%	23.7%	-21.7%
Top 20 total	£2,206,590	543,196	£4.06	£2,370,680	568,036	£4.17	7.4%	4.6%	2.7%
Top 20 share of total imports	82.0%	78.8%		81.9%	79.2%				

Source: HMRC via British Trade Statistics YE September 2016

8. UK Seafood Exports

- The UK's exports includes a large proportion of our domestic catch as this gains a higher value in foreign markets. Over the last year export volumes have fallen 5.6% to 444,151 tonnes whilst the value has increased 8.7% to be worth £1.5bn due to 15.2% inflation raising the average price per kg to £3.41.
- Despite falling volumes (1.2%) Salmon maintained its position as the UK's top export as 4.5% inflation has driven increased value (3.3%). Scallops growth has continued in terms of value (27.8%) and volume (17.4%) moving them to be the UK's second largest species. Nephrops growth was purely driven by inflation as volume exports declined (0.2%) so are now in third position. Mackerel and crabs have maintained their fourth and fifth positions respectively.
- The top eight export markets for the UK remain the same with no changes in value ranking: France, U.S.A., Spain, Irish Republic, Italy, China, Netherlands, Germany. All of these countries have bought more seafood by value except the USA which spent 5.6% less than in 2015. Denmark climbed three places to be ninth replacing Nigeria who are now fourteenth and South Korea maintained tenth position.

Source: HMRC via British Trade Statistics YE September 2016

Top export species 2015 - 2016

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

Species	Exports YE September 2015			Exports YE September 2016			% Change YE September		
	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value	Volume	Ave £ per Kg
Salmon	£527,163	114,842	£4.59	£544,690	113,502	£4.80	3.3%	-1.2%	4.5%
Scallops	£96,093	11,169	£8.60	£122,825	13,111	£9.37	27.8%	17.4%	8.9%
Nephrops	£97,236	13,589	£7.16	£107,677	13,563	£7.94	10.7%	-0.2%	10.9%
Mackerel	£91,990	103,821	£0.89	£79,814	90,047	£0.89	-13.2%	-13.3%	0.0%
Crabs	£52,015	15,130	£3.44	£57,859	16,247	£3.56	11.2%	7.4%	3.6%
Cod	£51,703	15,018	£3.44	£56,868	17,562	£3.24	10.0%	16.9%	-5.9%
WW shrimps & prawns	£43,373	6,308	£6.88	£51,681	7,691	£6.72	19.2%	21.9%	-2.3%
Lobster	£35,105	3,137	£11.19	£42,464	3,637	£11.68	21.0%	15.9%	4.3%
Herring	£38,714	69,195	£0.56	£35,354	46,998	£0.75	-8.7%	-32.1%	34.5%
Monkfish	£18,883	3,751	£5.03	£23,166	4,272	£5.42	22.7%	13.9%	7.7%
Tuna	£19,612	5,524	£3.55	£22,652	6,150	£3.68	15.5%	11.3%	3.7%
P&P shrimps & prawns	£18,898	4,028	£4.69	£19,793	3,626	£5.46	4.7%	-10.0%	16.4%
Coley	£8,902	4,786	£1.86	£11,931	5,201	£2.29	34.0%	8.7%	23.3%
CW shrimps & prawns	£6,894	1,108	£6.22	£9,084	1,184	£7.67	31.8%	6.8%	23.3%
Pollack	£7,997	3,790	£2.11	£6,239	2,108	£2.96	-22.0%	-44.4%	40.3%
Haddock	£2,377	858	£2.77	£3,026	1,022	£2.96	27.3%	19.1%	6.9%
Plaice	£512	305	£1.68	£1,225	859	£1.43	139.4%	182.0%	-15.1%
All others	£274,058	94,361	£2.90	£316,431	97,371	£3.25	15.5%	3.2%	11.9%
Total Exports	£1,391,524	470,720	£2.96	£1,512,777	444,151	£3.41	8.7%	-5.6%	15.2%

Source: HMRC via British Trade Statistics YE Sept'16

Top 20 export countries 2015 - 2016

Key: YE - Year Ending

Country	Exports YE September 2015			Exports YE September 2016			% Change YE September		
	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value (£000's)	Volume (tonnes)	Ave £ per Kg	Value	Volume	Ave £ per Kg
France	£352,930	79,238	£4.45	£409,940	86,501	£4.74	16.2%	9.2%	6.4%
U.S.A.	£200,476	37,713	£5.32	£189,332	32,264	£5.87	-5.6%	-14.4%	10.4%
Spain	£132,463	32,828	£4.04	£156,265	34,316	£4.55	18.0%	4.5%	12.9%
Irish Republic	£127,645	42,687	£2.99	£137,081	31,707	£4.32	7.4%	-25.7%	44.6%
Italy	£91,999	18,640	£4.94	£106,297	18,713	£5.68	15.5%	0.4%	15.1%
China	£73,582	21,508	£3.42	£81,110	18,932	£4.28	10.2%	-12.0%	25.2%
Netherlands	£66,426	76,722	£0.87	£69,873	69,852	£1.00	5.2%	-9.0%	15.5%
Germany	£50,470	19,598	£2.58	£65,561	22,309	£2.94	29.9%	13.8%	14.1%
Denmark	£26,172	16,401	£1.60	£29,531	16,952	£1.74	12.8%	3.4%	9.2%
South Korea	£28,273	3,853	£7.34	£26,795	3,622	£7.40	-5.2%	-6.0%	0.8%
Poland	£27,086	13,389	£2.02	£26,099	15,490	£1.68	-3.6%	15.7%	-16.7%
Belgium	£19,530	3,182	£6.14	£24,831	4,582	£5.42	27.1%	44.0%	-11.7%
Vietnam	£12,373	7,015	£1.76	£19,668	10,944	£1.80	59.0%	56.0%	1.9%
Nigeria	£40,248	44,888	£0.90	£17,403	19,906	£0.87	-56.8%	-55.7%	-2.5%
Hong Kong	£13,064	1,944	£6.72	£12,384	1,760	£7.04	-5.2%	-9.5%	4.7%
United Arab Emirates	£9,456	1,282	£7.38	£10,158	1,315	£7.72	7.4%	2.6%	4.7%
Portugal	£8,915	3,102	£2.87	£9,369	3,920	£2.39	5.1%	26.4%	-16.8%
Canada	£8,369	1,728	£4.84	£9,002	1,808	£4.98	7.6%	4.7%	2.8%
Taiwan	£7,214	2,456	£2.94	£8,645	2,232	£3.87	19.8%	-9.1%	31.9%
Japan	£6,773	3,243	£2.09	£8,490	2,428	£3.50	25.4%	-25.1%	67.4%
Top 20 total	£1,303,459	431,417	£3.02	£1,417,834	399,553	£3.55	8.8%	-7.4%	17.4%
Top 20 share of total exports	93.7%	91.7%		93.7%	90.0%				

9. 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)

10. UK Foodservice Sector

- To year end Sept 2016, consumers spent £53.3 billion on eating out of home, an increase of 3% on the previous year. The industry has remained buoyant through a 1.3% increase in visits, a 1.6% increase in the number of servings and a 1.9% increase in the average eater spend driven by rising prices.
- This positive performance trend was experienced by all channels except work / college / university canteens which experienced a fall in sales value despite higher prices as consumers visited the channel less often.
- Consumers spent approximately £3.1b on eating seafood out of home, an increase of +1.5% on the previous year. Seafood servings increased 6.8% this year was driven by positive performance in all channels, except work / college / university canteens which saw a 9% decline in their seafood servings.
- Fried fish has increased its dominance of the sector by 1.2% to hold 36.8% share of seafood servings and fish/seafood sandwiches now hold 29.2% share. Cod has also increased its lead in the out of home market and now accounts for 31.7% of all fish servings / 14.8% share of all seafood servings. The other seafood items that have experienced an increase in the number of servings are prawns, haddock, scampi and mussels. In contrast, the number of mackerel, calamari, tuna and salmon servings declined

Source: NPD Crest 52-Weeks Ending Sept'16

11. UK Fish and Chip Sector

- There are approximately 10,500 takeaway fish and chip shops in the UK, collectively serving around 380 million meals per annum.
- 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

Supporting a profitable, sustainable and socially responsible future for the seafood industry.

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