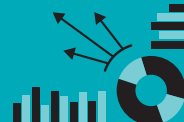


seafood processing industry performance data: 2012-2022



All data refers to majority seafood processing sites located in the UK.

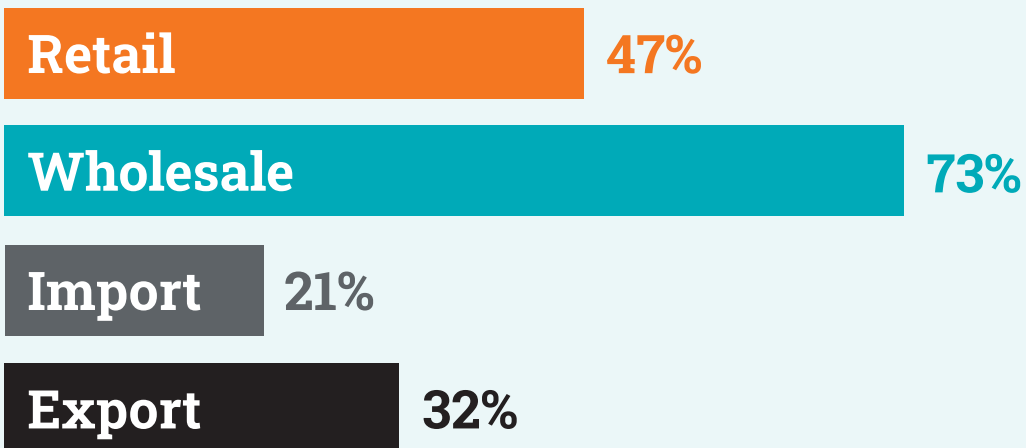
Majority seafood processing sites are defined as those that derive 50% or more of their annual turnover from seafood processing (as opposed to trading, wholesaling, retailing, importing, exporting).

Industry Profile (2022)



130 in Scotland
205 in England
17 in Northern Ireland
7 in Wales

Proportion of sites that also...



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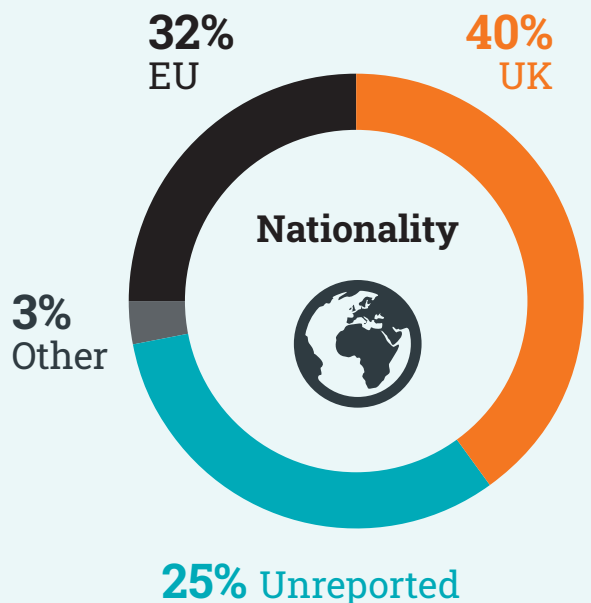
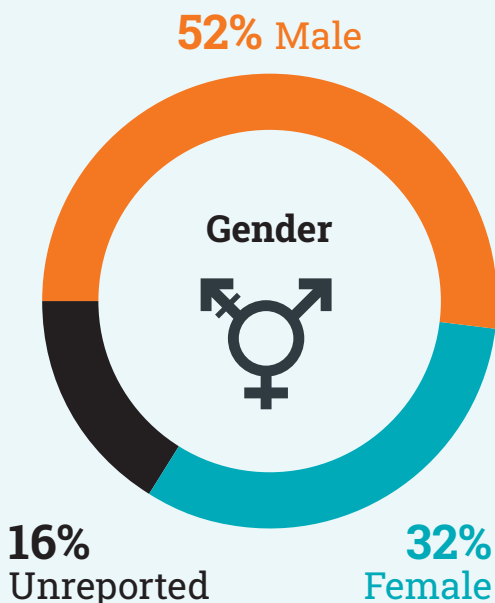
16,761
Full-time
employees

1,747
Part-time
employees

481
Seasonal
employees

(FTE: Full-time equivalent)

Share of FTE jobs by...



Economic Performance (2020)*

To produce these estimates, the Seafish Economics team collects financial data from UK majority seafood processors each year. All majority seafood processors are invited to participate. Participation is voluntary.



£4.4bn
Turnover

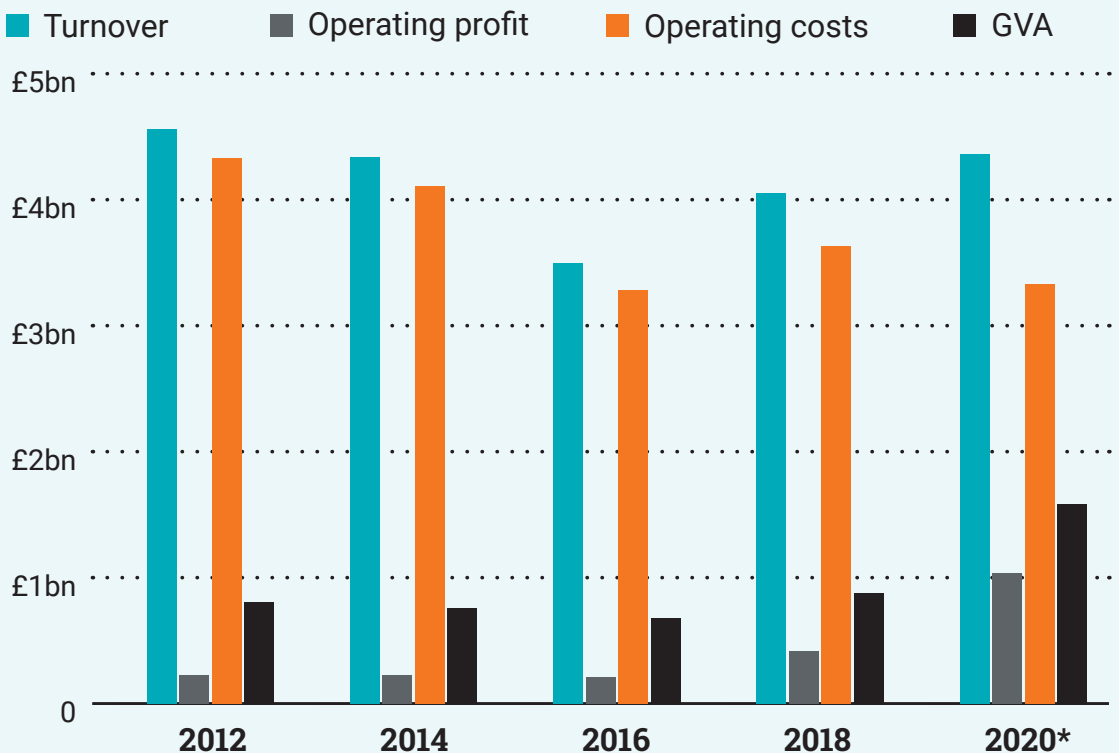
£1.0bn
Operating Profit

£1.6bn
GVA

Industry Trends (2012-22)

Total turnover in the UK seafood processing sector has remained around £4 billion since 2012. This is driven by the largest companies in the sector. Total industry turnover increased in 2020, suggesting the overall increase in retail sales during the Covid-19 pandemic was able to offset losses in foodservice and export markets.

Economic Performance



Costs (2020)*

* 2020 financial data are preliminary

£2.2bn

Raw Material

£550m

Labour

£35m

Energy

£516m

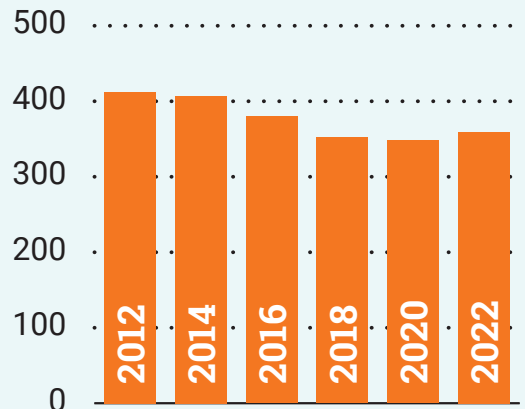
Other Operating Cost



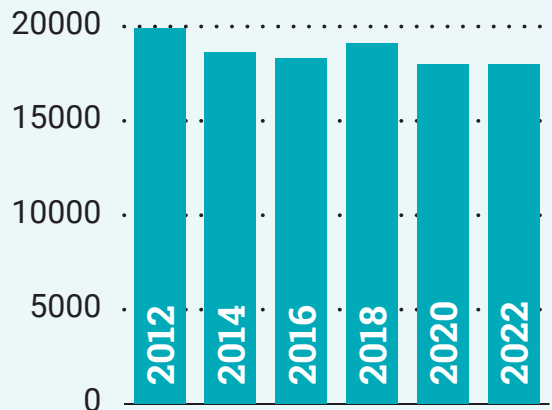
The number of majority seafood processing sites and FTE jobs* supported by the sector has generally condensed since 2012. The drop in sites over time has largely been driven by a reduction in the number of small and medium sized sites (sites with less than 50 FTEs) in Scotland and England. Some sites closed, others grew or merged with other sites. In 2022 we identified more majority seafood processing sites than in 2021. Some of these additional sites were new, while others increased their share of seafood processing from below 50% (minority site) in 2021 to more than 50% (majority site) in 2022.

*Changes in FTEs may be impacted by a degree of seasonality in the workforce. Depending on the type of processing activity, employment can vary considerably during the year and may partially explain employment trends. Please refer to the Processing Methodology Report for more detail on data collection periods between years.

Number of sites



Number of FTE Jobs



National Profiles (2022)

- Scotland
- England
- Wales
- Northern Ireland



England

Size Band	No. of sites
FTE 1-10	107
FTE 11-25	36
FTE 26-50	22
FTE 51-100	19
FTE 100+	20
Unreported	1

Scotland

Size Band	No. of sites
FTE 1-10	53
FTE 11-25	25
FTE 26-50	20
FTE 51-100	10
FTE 100+	22
Unreported	-

Northern Ireland

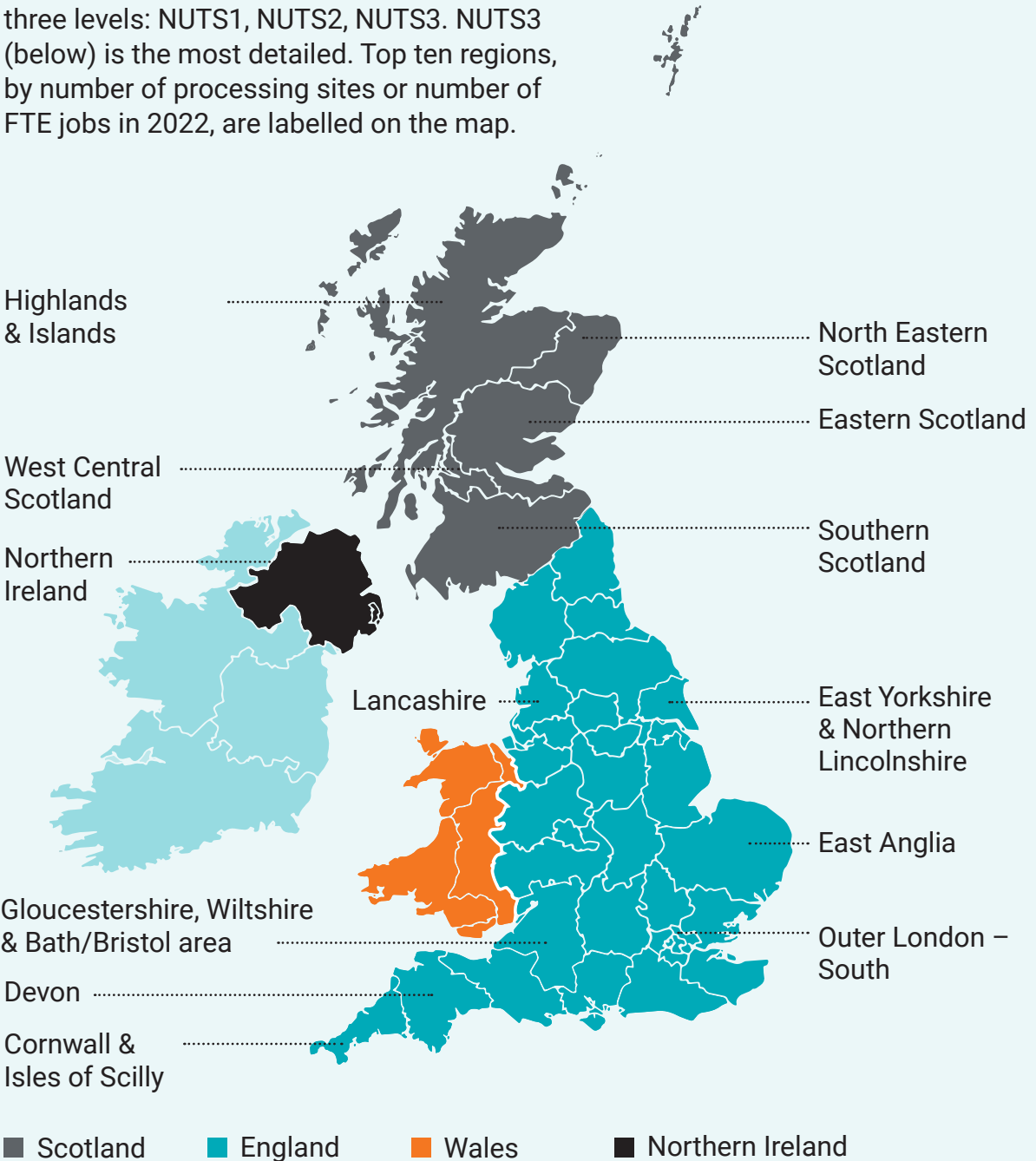
Size Band	No. of sites
FTE 1-10	9
FTE 11-25	5
FTE 26-50	2
FTE 51-100	-
FTE 100+	1
Unreported	-

Wales

Size Band	No. of sites
FTE 1-10	6
FTE 11-25	1
FTE 26-50	-
FTE 51-100	-
FTE 100+	-
Unreported	-

Regional Profiles (2022)

Nomenclature of Territorial Units for Statistics (NUTS) is a geocode standard for referencing the subdivisions of European countries for statistical purposes. There are three levels: NUTS1, NUTS2, NUTS3. NUTS3 (below) is the most detailed. Top ten regions, by number of processing sites or number of FTE jobs in 2022, are labelled on the map.



North Eastern Scotland (Grampian) and East Yorkshire and Northern Lincolnshire (the Humber) remained key regions for seafood processing in the UK in terms of both number of sites and FTE jobs supported. In both of these regions, number of sites and number of FTE jobs increased between 2021 and 2022.

Top 10 regions by number of sites	Sites (2022)	Change from 2021 (%)
East Yorkshire & Northern Lincolnshire	52	13%
North Eastern Scotland	49	2%
Highlands & Islands	44	2%
Cornwall & Isles of Scilly	21	-13%
Eastern Scotland	21	11%
Northern Ireland	17	13%
Devon	15	-12%
Lancashire	13	0%
Southern Scotland	12	-14%
East Anglia	12	20%

Top 10 regions by number of FTE jobs	Jobs (2022)	Change from 2021 (%)
East Yorkshire & Northern Lincolnshire	5,870	9%
North Eastern Scotland	3,493	4%
Highlands and Islands	1,404	-20%
Eastern Scotland	994	8%
Southern Scotland	978	-30%
Devon	601	-16%
Gloucestershire, Wiltshire & Bath/ Bristol area	567	11%
Cornwall & Isles of Scilly	522	4%
Northern Ireland	482	21%
Outer London - South	425	0%

Species type (2022)

Mixed



FTE Jobs 12,640

Number of sites 182

70% of seafood processing FTE jobs in the UK were at sites processing a mixture of species. Sites in East Yorkshire and Northern Lincolnshire (the Humber) region supported 42% of all FTE jobs at mixed processing sites in 2022, following by sites in North Eastern Scotland (Grampian) (19%).

Pelagic



FTE Jobs 891

Number of sites 12

51% of FTE jobs at pelagic processing sites were in the North Eastern Scotland (Grampian) region. Pelagic processing sites were evenly spread across site sizes.

Shellfish



FTE Jobs 2,378

Number of sites 74

Most shellfish processing sites (72%) supported 25 or fewer FTE jobs. Most shellfish processing jobs were in England (52%) and Scotland (32%). In England, these sites were smaller on average (25 FTEs/site) than in Scotland (55 FTEs/site).

Demersal



FTE Jobs 746

Number of sites 52

Most demersal processing sites (87%) supported 25 or fewer FTE jobs. Both North Eastern Scotland (Grampian) and East Yorkshire and Northern Lincolnshire (the Humber) were clear regional hubs for demersal processing, with these two regions accounting for 82% of the FTE jobs supported by demersal sites.

Salmon/Trout



FTE Jobs 1,305

Number of sites 33

The largest proportion (43%) of all FTE jobs at salmon processing sites in 2022 was at sites in the Highlands and Islands region, followed by Cumbria (14%) and West Central Scotland (13%).

Unreported

FTE Jobs 40

Number of sites 6

Processing type (2022)

In 2022, 70% of primary processing sites employed 10 or fewer FTEs. Together these small sites supported 21% of FTE jobs at primary processing sites in the UK, most of which were located in North Eastern Scotland (Grampian) and East Yorkshire and Northern Lincolnshire (the Humber).

Six secondary processing sites employed over 100 FTEs in 2022. Together these six sites supported 82% of the FTE jobs at secondary processing sites in the UK. Four were located in England and two were located in Scotland.

While over 40% of mixed processing sites employed fewer than 10 FTEs in 2022, nearly 70% of FTE jobs at mixed processing sites were supported by sites with over 100 FTEs. Most of these large mixed processing sites were located in North Eastern Scotland (Grampian) and East Yorkshire and Northern Lincolnshire (the Humber).

Primary

Includes: cutting, filleting, deboning, picking, peeling, washing, chilling, packing, heading and gutting.



FTE Jobs	1,175
Number of sites	67

Secondary

Includes: brining, smoking, cooking, freezing, canning, breasting, vacuum and controlled packaging, drying, production of ready meals.



FTE Jobs	3,160
Number of sites	44

Mixed

A mix of primary and secondary processing.



FTE Jobs	13,549
Number of sites	240

Unknown

FTE Jobs	116
Number of sites	8

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