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# UK Seafood Supply Chain Overview:

## October-December 2022

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*April 2023*

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## Introduction

This report takes a high-level view of the whole of the seafood supply chain to explore factors impacting UK seafood markets, seafood business operations and consumer behaviour during October to December 2022.

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

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## Industry Impacts Overview

**October-December 2022: Inflationary pressures, the cost-of-living crisis, political uncertainty and labour shortages impacted businesses across the seafood supply chain during this period.**

Across the UK Economy, inflation reached a 40-year high in October and food inflation was even higher. Though this hadn't yet extended to seafood prices, it meant that consumers had less budget for seafood which is already a more expensive protein. These rising inflationary pressures acted to destabilise the recovery from the pandemic and gave rise to new economic risks for businesses. Political changes during this period, with two new UK Prime Ministers appointed in quick succession, also fed uncertainty in the UK economy and financial markets. Exchange rates also remained volatile throughout this period making it more difficult for some UK businesses to trade internationally.

Wage growth did not keep pace with inflation during this period, resulting in falling real incomes and strained personal budgets. Indeed, the outlook for households and businesses was significantly more challenging during this period than was anticipated at the start of 2022. Reports also suggested that consumer sentiment had fallen to its lowest level since November 2020 when the UK was under strict Covid-19 restrictions.

The lag in price increases being passed down the seafood supply chain meant the impact on inflation (and consumer trends) into 2023 was not yet clear during this period. However, rising prices and increasing costs continued, with food inflation spiking in October. In response, consumers bought less food and specifically less fresh food. Retail data for the period showed a decline in fresh and frozen seafood sales, with customers either switching to ambient (tinned) seafood or out of seafood all together. Meanwhile, seafood sales in foodservice suffered less as consumers transitioned back from quick service to on premise meals in pubs and restaurants, with some customers still keen to make the most of the first restriction-free holiday season in three years.

Processing business also dealt with rising production costs, though many had yet to increase their prices. Nevertheless, business activity remained constrained for many due to high energy prices and other rising input costs. Labour shortages also persisted with vacancy rates remaining high for many businesses. Some businesses were forced to reduce their production during this period due to these cost pressures and labour shortages.

The raw material supply side of the supply chain was vulnerable during this period with many suppliers only able to commit to short term price contracts due to rising inflation and volatility in the value of the pound. Competition for non-Russian whitefish supplies remained strong, keeping prices high for these raw material imports. However, domestic whitefish supply received a boost with the announced uplift in North Sea cod and haddock quota for 2023 based on the assessed health of these stocks.

## Markets

### Key points

- Seafood sales in retail continued to decline to the end of 2022, with consumers trading down to tinned seafood as the cost-of-living crisis strained personal budgets.
- Seafood sales in foodservice continued to recover to the end of the year, with all channels experiencing year on year growth in seafood visits and servings except for Fish & Chip Shops and Quick Service Restaurants.
- Export value was down for demersal, shellfish and salmon products in the run up to the holiday season due to low export volumes across species groups in November and December.



#### Retail

Both the value and volume of seafood sales in retail continued to fall to the end of 2022. Overall, the total value of seafood sales in 2022 was down around 4% on 2021 and volume of sales was down nearly 6%. The reduction in seafood sales in October to December and in 2022 overall was largely driven by the cost-of-living crisis, with consumers buying less seafood less often and trading down from more expensive fresh products to cheaper frozen and tinned products. Inflation had not yet hit seafood prices by the end of 2022 and seafood is already a relatively expensive protein. Therefore, the decline in seafood sales in retail is expected to accelerate in 2023 as seafood prices increase in line with other food items to reflect increased production costs.

Retail data for this period showed consumers changing their grocery shopping habits in a number of ways to save money. One in three brits switched to shopping at a discounter and almost a fifth ate more plant-based meals to reduce their grocery bills. Many consumers also switched away from branded products to save money. Overall, the number of shoppers purchasing seafood continued to fall compared with October to December 2021 and fewer shoppers shopped less often, spending more on significantly smaller baskets.

Overall, shoppers traded down within the seafood category to save money. Normally struggling, ambient (tinned) seafood was the only sector in growth during this period, with consumption up 10% in December compared to 2021 (Figure 1). Chilled seafood, as the most expensive format, continued to decline with sales volumes down 8% in December compared to the same time in 2021, while frozen seafood was down 10%. Pressure on personal finances impacted nearly all species sales to the end of the year. Notably tuna, as well as mixed seafood, sardines, crabstick, and hake were in growth

as consumers looked for cheaper meal alternatives. These trends are likely to continue until financial pressure and economic uncertainty ease.

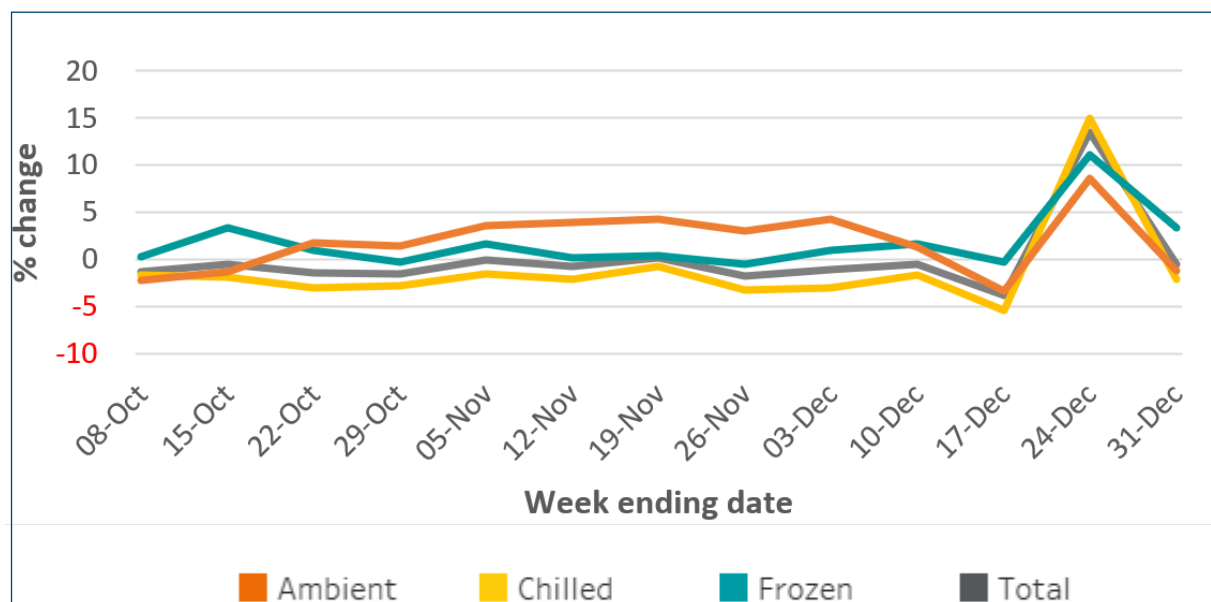


Figure 1. Weekly seafood volume sales in retail during October to December 2022 compared to previous year.

In response to these negative sales trends, retailers made changes to attract and retain customers. Some focussed promotional activity on meals that were quick and less energy intensive to cook. Others promoted cheaper or own brand products. Reports from the period also suggest that the usual retail displays for seafood at Christmas were much reduced in 2022.

The cost-of-living crisis and rising operating costs also impacted independent retailers (fishmongers) across the UK. Fishmongers reported losing custom during this period, with some customers not shopping at all and others buying smaller portions due to the cost-of-living crisis. Product availability was also a problem for some, with increased costs and longer lead times for packaging and other raw materials hampering business. Cod and haddock were particularly difficult for some businesses to source during this period. Labour shortages impacted independent retailers during October to December, making it more difficult to keep operations going. Rising energy costs also squeezed profits due to the high electricity requirements of refrigeration.



## Foodservice

Foodservice ended the year well with the first restriction free holiday season in three years allowing more consumers to return to on-premise dining. Overall, consumer visits to foodservice outlets were up 5% in October to December compared to the same period in 2021 after a slight decrease in July to September (Figure 2). This included an added boost to foodservice from the winter world cup, with more people

eating out or ordering in while watching the tournament. Servings sold in foodservice were also up during this period, with customers still keen to make up for time 'lost' during the pandemic.

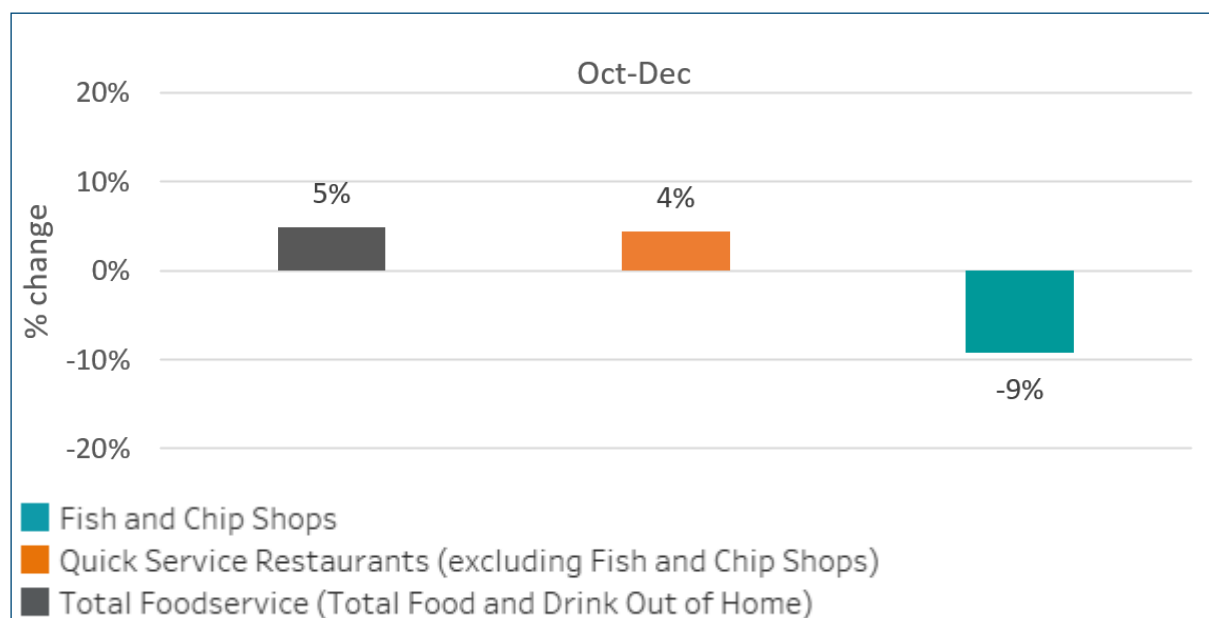


Figure 2. Foodservice visits during October to December 2022 compared to previous year.

During this period consumer demand shifted back from take away and quick service meals (more popular during the pandemic) to sit down dining. Indeed, Fish and Chip shops underperformed in October to December compared to the same period in 2021 and customers spent less at Quick Service Restaurants. Meanwhile Full Service (sit down) Restaurants saw an increase in visits (+9%) and visits to Pubs were up nearly 13% compared to the same period in 2021.

Servings of seafood in foodservice represent 4% of the total foodservice market and grew by 9% to the end of 2022. Twelve-month spend for total seafood out of home was up 22% compared to 2021 and visits were up by 8%. However, this was still below 2019 (pre-pandemic) levels and the growth of seafood in foodservice continued to lag behind the total foodservice market.

For foodservice, recovering post pandemic was already daunting but rising energy and raw material costs, labour shortages and supply chain issues put increasing pressure on an already struggling market. Some businesses reported a reduction in bookings due to the impact of the cost-of-living crisis on customer budgets. It is expected that this trend will continue into 2023 as costs continue to rise. In response, businesses continued to call for a cut to VAT but no changes were made during this period.

In the run-up to the festive season businesses gave mixed reports on their trading conditions. Some of those that were struggling reduced their menus and/or opening hours as a cost reduction measure to see them through the winter. Others were unable to keep operations going resulting in a record number of restaurant closures announced during this period.

In foodservice, loyalty has always been a key driver of sales. It is expected to remain an important factor for people when choosing where they will eat out. Here, loyalty-based apps that communicate offers and deals could help businesses, especially as consumers look to cut costs.



A number of changes related to regulation and the trade environment were announced during October to December. On the positive side, in October HMRC announced that the Trader Support Service (TSS) would be extended until the end of 2023 to provide ongoing support to businesses moving goods between Great Britain and Northern Ireland. Trade agreements with Switzerland and South Korea both entered the scoping (pre-negotiation) stage during this period, reflecting positive developments for future trade opportunities. The EU also changed its regulation to allow the practice of "superchilling", which improves freshness and shelf-life by bringing temperatures down faster. Though this technique isn't currently widely practiced in the UK it could be used by UK businesses in future.

Other changes during this period continued to challenge UK businesses. Variation across EU member states in the application of EU-wide directives, including those related to plastic packaging made exporting less straightforward for some UK businesses. These differences highlighted wider issues caused when the border control point of clearance (where UK products first enter the EU) is not in the product's final destination country. For example, a lot of UK seafood exports first enter the EU at a border control point in France or the Netherlands. If these countries are not the final destination for the product and they have different packaging or labelling requirements than the final destination country, there may be issues at border control points resulting in products being incorrectly rejected. Businesses trading with the EU also continued to experience delays with the implementation of new trading arrangements including export digitalisation. Outside of the EU, UK businesses reported third countries including China and India becoming stricter with trade and increasing their certification and registration requirements for UK exporters.

During this period, British exports to the EU continued to recover from the dual shocks of Brexit and Covid-19 with cumulative seafood export value only 9% lower than pre-pandemic levels by the end of December. Recovery across 2022 was largely driven by an increase in salmon export value to the EU. Demersal export value also made a strong recovery from -46% on pre-pandemic levels in January 2022 to -14% by the end of December.

Beyond the EU, global demand for UK seafood was strong with many businesses entering new overseas markets throughout 2022. This interest accelerated between October and December as businesses looked ahead to the global seafood expos scheduled for the first quarter of 2023 where they aimed to initiate and strengthen



relationships with buyers. Interest in developing new markets in China and the Middle East was particularly strong amongst exporters.

In October to December, Demersal export volume was at its lowest point in the past five years. This may have been driven by an increase in domestic demand for whitefish caused by the jump in demersal import prices following the introduction of the additional tariff on Russian imports in July. Due to this reduction in export volume, total demersal export value was down in October to December compared to 2021 (Figure 3).

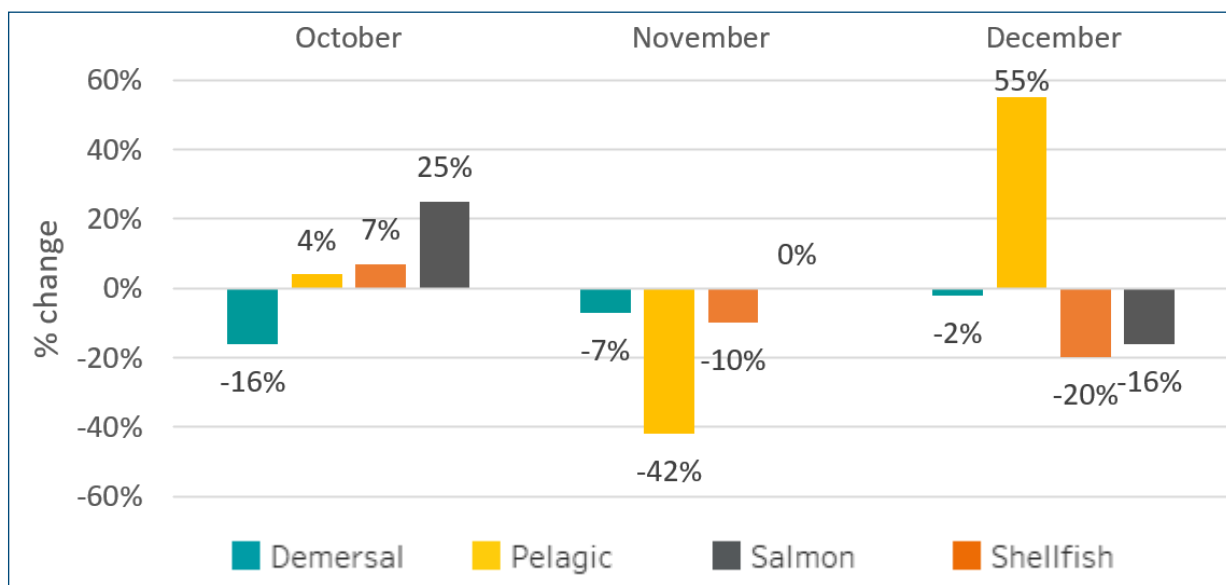


Figure 3. October to December UK export values compared to previous year, by month and species group.

The value of shellfish exports was down in the run up to the holiday season compared to the same period in 2021. Shellfish export volume across October to December was at its lowest point of the past five years while prices were at their highest. Despite these high average prices, total export value was down in November and December because of the large reduction in export volume. The drop in export volume was mainly to France, Ireland, China, Portugal and South Korea.

The value of salmon exports was also down in December compared to the same period in 2021. This seems to have been driven by two main factors. Firstly, export value in December 2021 was unusually high as a result of higher than usual export volume and prices. Secondly, similar to the situation with shellfish exports, despite higher average prices, global export volumes were much lower in 2022 than 2021 resulting in lower overall salmon export value. The reduction in export volume in December was mainly reflected in trade to France, Ireland, Poland and Ukraine. Salmon exporters also raised concerns during this period about the impact of new physical inspections on seafood exports introduced at EU border control posts, with reports of product being damaged during the process resulting in lost consignments. In response, businesses were advised they could request border control agents not to return sampled product back to the consignment.

Overall pelagic exports followed the usual seasonal variation and trends of the main fisheries during October to December. Meanwhile, small scale pelagic exports from southwest England were stymied during this period due to uncertainty about EU entry requirements for bulk fresh exports in slush ice and issues with melt water. Processors were unwilling to gamble on fish being sent in the wrong format. Instead, they opted to process and freeze everything before exporting or export fresh product in smaller batch quantities. This meant that processors had reduced capacity and the amount of product available for export. It also had a knock-on effect on fishermen who weren't able to catch and land as much due to reduced processors capacity.

## Production & Distribution

### Key points

- Seafood processors continued to face supply chain and production challenges related to raw material, energy and labour.
- Labour shortages remained an acute issue across the seafood supply chain during this period.



### Processing, Transport & Logistics

During October to December, the seafood processing sector worked to keep on top of supply chain challenges as well as the impact of inflation on consumer demand for seafood. Key supply chain and production challenges included ongoing labour shortages, energy price increases and uncertainty associated with changes in policy from the series of leadership contests in the UK government at the start of this period. On the sales side, businesses were concerned about the impact of the cost-of-living crisis on market demand for their products, while recognising their need to raise prices to cover costs.

Businesses reportedly found themselves chasing prices during this period, with the build-up of labour, energy- and raw material cost issues coming to a head. Inflationary impacts were felt across everything from raw materials, packaging, fuel, energy and transportation. Even with the introduction of the 6-month government energy support scheme on 01 October, processing businesses continued to face energy costs at least twice as high as in the same period in 2021. These increases were particularly steep for those with a large freezing requirement. Meanwhile, labour shortages continued to plague many businesses. Some factories reported manning filleting lines at only 50-60% capacity because they didn't have enough staff to run at full capacity. At the same time, many businesses were reluctant to invest in training, automation or other efficiency improvements that could help alleviate these issues due to the uncertain economic climate.

Some businesses in northeast Scotland also prepared for an increase in pelagic landings from January 2023 when changes to the economic link requirement begin to be phased in for Scottish registered vessels. This change is expected to mainly impact pelagic processors. Given that local labour shortages can already be a bottleneck in production, processing capacity for these additional landings may remain limited or become more acute if skippers and processors don't work closely to manage landings.

The cost-of-living crisis continued to impact market demand for seafood products in the run up to the festive season. Normally a busy time for seafood, many businesses felt the impact of inflation on consumer demand with lower than expected orders

during the holiday period even though seafood inflation remained comparatively low through the end of the year. Though businesses recognised their need to raise prices to cover increasing production costs, they also understood that consumer budgets were shrinking. During this period many supermarkets also announced tenders for seafood products to try and keep their costs down and increase competition amongst suppliers (processors). Some processors won new contracts while others lost custom through this process. Businesses exported products also struggled with the low value of the pound and volatility in the exchange rate, particularly in the first half of this period.



## Workforce

Accessing and retaining labour remained an acute issue across the seafood supply chain to the end of 2022, with many businesses reporting that the Skilled Worker Visa route was not sufficient to meet the wide-ranging labour shortages facing the sector. In the catching sector some vessel operators couldn't go to sea due to a lack of labour. Fishing businesses reliant on hiring crew through the transit visa system were also worried about the changes to this system announced during this period. Labour remained a limiting factor in production for many processing factories. Meanwhile, a large-scale recruitment initiative for the restaurant and hospitality sector was launched at the end of October to help address their labour shortages.

The main labour story in the catching- and Scottish salmon sectors during this period was about uncertainty in future access to labour without the transit visa system. This visa allows non-UK nationals to work onboard UK-registered vessels in UK territorial waters. The original deadline to scrap the transit visa was set for November 2022 but during this period it was moved to March 2023 to allow more time to understand the impact of the changes on vessel operators and develop appropriate guidance for businesses. Without the transit visa, businesses will be reliant on the Skilled Worker Visa route to hire foreign crew. This route is seen to be difficult, expensive and have limited success in recruiting suitable crew.

In the processing and logistics sectors, labour shortages continued to limit supply chain- and production efficiency. For example, worker shortages at fish markets and at logistics companies meant it took longer to clear the market floor after fish auctions. Within factories, production lines couldn't be manned at 100% capacity in some cases, limiting processing efficiency and production capacity. These issues were exacerbated within businesses that see increased demand in the lead up to the festive season. Onshore businesses reported similar issues with the cost, paperwork and time requirement needed to recruit staff through the Skilled Worker Visa route.

Labour shortages continued to plague the foodservice sector even as some businesses saw a reduction in bookings due to the cost-of-living crisis. A shortage of suitably skilled chefs also changed raw material requirements for some restaurants. For example, some restaurants reported switching to pre-portioned

seafood due to a lack of in-house filleting abilities. To help address some of these labour issues, a large-scale recruitment initiative for the restaurant and hospitality sector was launched at the end of October.

Other initiatives were also launched during this period to address labour shortages across the UK economy including:

- The launch of the Lincoln School of Hospitality and Catering to create a restaurant and training kitchen using a grant from the Lincoln Towns Fund.
- A document with 3 policy options for a pilot proposal to target migration solutions for remote and rural areas of Scotland was developed by Scottish Government in collaboration with local authorities and business sector organisations and submitted to the Home Office and Migration Advisory Committee (MAC). The proposal set out three policy options: adjustment to the Skilled Worker Visa, a new Scottish Visa, a new Remote and Rural Migration Partnership Scheme.
- The launch of a new apprenticeship scheme to help prepare prisoners to re-join the workforce following a change in law that removed some of the employment barriers for those with past convictions. This scheme places prisoners currently serving time at open prisons and/or those at the end of their sentences on apprenticeship programmes with employers.

## Supply & Primary Production

### Key points

- Import value during this period was broadly comparable to 2021 levels. Overall import volume was down but average import price was up 10% on 2021.
- Fish and shellfish prices generally remained strong during this period, but high fuel costs continued to knock profitability across the catching sector.
- Shellfish farmers continued to face water quality issues while salmon producers saw less demand from key international markets in the run up to the festive season.



### Imports

The regulatory landscape for imports to the UK remained relatively unchanged during this period. The new regime of import controls that the UK plans to implement (Target Operating Model), was previously expected to be published in Autumn 2022 but this was further delayed into 2023. In terms of the general trading environment, it became relatively more expensive for UK businesses to import seafood due to unfavourable exchange rates and the weak value of the pound during this period. Trade with China remained particularly difficult as dozens of cities were put back into lockdown under the government's zero-Covid policy, limiting Chinese seafood processing capacity.

Considering imports by main species groups, demersal (whitefish) import values remained above 2021 levels during this period (Figure 4). Average prices were still well above 2021 levels in October to December, though price increases continued to slow from June onwards. In June prices were 52% higher than in 2021, whereas they were 28%, 27% and 24% higher in October, November and December respectively. These increased prices were driven by the reduced global supply of non-Russian whitefish. Trade data for the period shows that demersal import volume from Russia was 74% lower than in 2021. However, data also shows that despite the introduction of an additional tariff on imported Russian whitefish in July, direct imports of whitefish from Russia did not drop off until September. This suggests that some UK businesses continued to import whitefish from Russia for a few months after the tariff was introduced to ensure they had built sufficient stock. The added tariff introduced by the UK government also meant that UK businesses were paying more for whitefish than their European counterparts. Looking ahead to 2023, prices are expected to remain high with some retailers reportedly looking to replace frozen cod and haddock imports with pollock and basa.

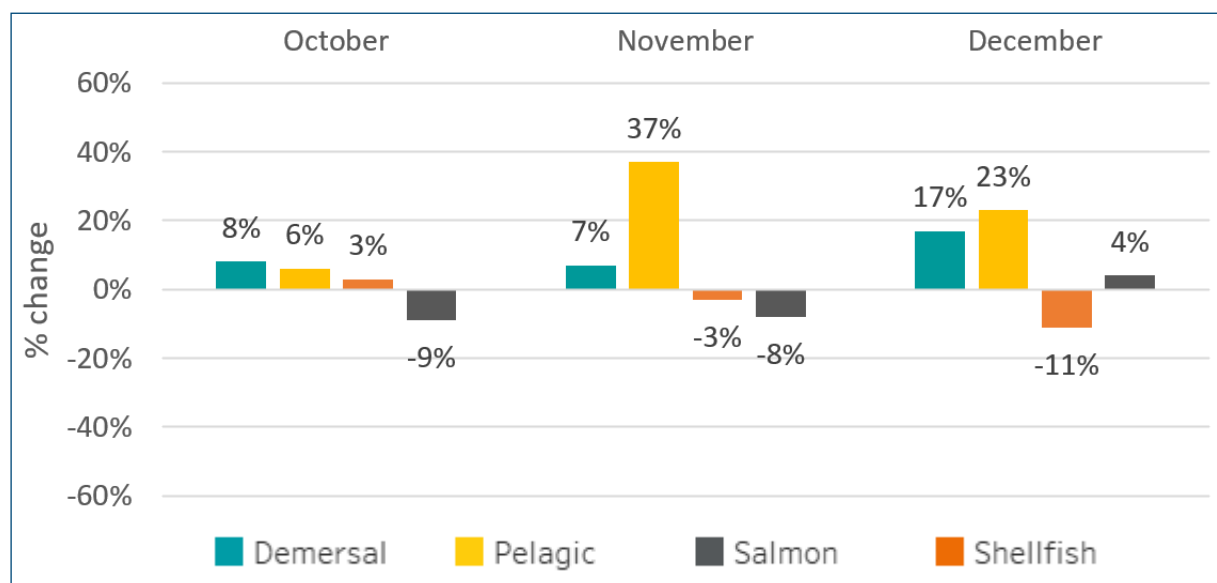


Figure 4. October to December UK import values compared to previous year, by month and species group.

Shellfish import value during October to December was down compared to 2021 levels. This was largely driven by a decrease in key shellfish import volumes. Specifically, shrimp and prawn import volumes from Vietnam and India were down 27% and 32% respectively compared to the same period in 2021, while lobster import volume from Canada was down 54%. Meanwhile, lobster import from the USA was up 34% during October to December. On the other hand, an additional 2022 autonomous tariff quota for cold water prawns was opened during this period allowing for greater access to tariff-free cold water prawns (+3,200 tonnes).

Businesses reported that salmon import prices had generally “settled down” during this period, however they increased again in December. As a result, December saw the highest salmon import value in the past five years. Import prices could rise further in 2023 depending on the outcome of the proposed 40% Norwegian tax for aquaculture producers that was announced at the end of September.

Pelagic import value was up on 2021 levels across this period, with prices rising from September to the end of the year. The notable increase in import value recorded in November was largely driven by a 174% increase in Mackerel volume and a 23% increase in Tuna volume.



## Landings

Though prices generally remained strong during this period, high fuel costs continued to limit profitability across the catching sector. Fuel costs were below the peak seen earlier in the year but were still well above 2021 levels and continued to add financial pressure during this period. Despite operating cost pressures, many skippers reported profitable fishing due to the high prices they received. In Peterhead, market prices were generally strong for whitefish until the beginning of December, when average prices at



the auction began to drop. It is unclear whether this was due to strong landings in the lead up to the festive season, or inflationary pressures limiting the price buyers were willing to pay for raw material. In southwest England on the other hand, Brixham market reported a record year, with total landed sales value up nearly 50% on 2021 levels to over £60 million. Brixham also credited part of the increase in landings throughout 2022 to Brexit, with more vessel operators landing to the market rather than to French ports due to being unable to land directly into French ports due to paperwork issues.

While prices were strong during this period, there were mixed reports about the state of various fisheries around the UK. Shellfish fishermen in northeast England continued to call for government support to compensate local vessel owners who were still being affected by the collapse of crab and lobster populations since autumn 2021. The Thames water and southern water sewage and water quality issues were ongoing and continued to impact shellfish inshore fishing in addition to the shellfish aquaculture sector. Meanwhile in Northern Ireland, AFBI published shellfish advice for 2023 which including reducing brown crab landings by 50%, king scallop landings by 10% and queen scallop landings by 14%. However, this advice is not binding. While some issues related to agreements on pelagic stocks continued, the Scottish pelagic fleet reported a strong autumn mackerel season during this period, with skippers successfully coordinating landings with local factories to meet market demand. On the whitefish front, trilateral fishery negotiations between the UK, EU and Norway concluded in December with valuable fishing opportunities secured for the UK fleet in 2023. These included an increase in quotas for most North Sea stocks. Total allowable catches for cod were increased 63%, with haddock and whiting both increased 30%. However, monkfish quota was cut substantially, raising concerns for those operating in mixed fisheries and those targeting this high value species

Overall pelagic landings followed the usual season pattern during this period, while demersal landings value remained strong against 2021 levels and shellfish landings value improved in December in the run up to the holiday season (Figure 5).

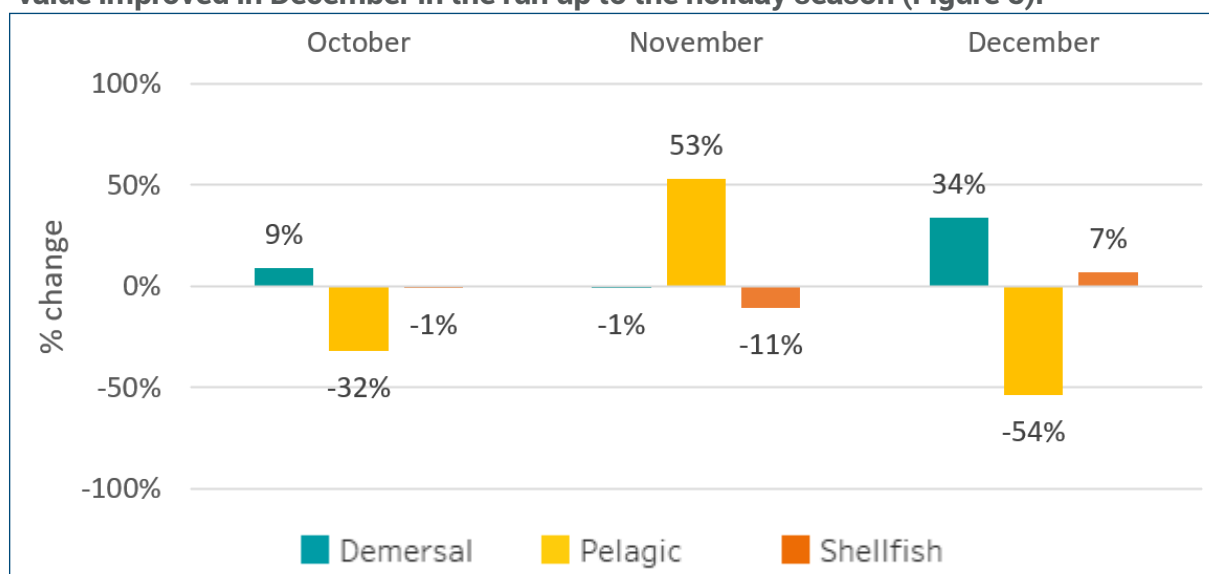


Figure 5. October to December UK landings values compared to previous year, by month and species group.



During October to December fishing businesses began preparing for regulatory changes coming into effect in early 2023 including:

- New fishing prohibitions within the Northern Ireland MPA network that will be introduced and four new scallop enhancement sites that will be implemented from 1st January 2023.
- Retention and landing of 'soft shelled crab' will be prohibited in Northern Ireland from 31st January 2023.
- Changes to the economic link licence conditions for Scottish registered vessels will begin to be phased in from 1 January 2023 and will require vessels that catch stocks of key economic importance to Scotland to land a set minimum percentage of these stocks into Scotland. This change is expected to mainly impact pelagic vessels.
- Industry were informed that new transit visa rules would be enforced from spring 2023. The new rules specify that transit visas can only be used for vessels operating exclusively outside 12nm from the coastline, impacting some foreign crew working on UK fishing vessels. This change is expected to mainly impact Northern Irish and vessels operating off the west coast of Scotland.



## Aquaculture

Many shellfish producers continued to struggle during this period. Indeed, the Shellfish Association of Great Britain reported that UK oyster production was down by 30% and mussel production had reduced by 60% in England. Businesses also faced ongoing issues with untreated sewage being released into local waterways, impacting on water quality and the production of farmed shellfish.

International demand for Scottish salmon was dampened in the run up to the festive season with export volumes much lower in 2022 than 2021. Despite higher average prices, export value was still down on 2021 levels in December. Meanwhile, market demand for responsible sourcing credentials led to a 144% increase in Scottish salmon farms seeking Aquaculture Stewardship Council (ASC) certification across 2022 compared to 2021.

Aquaculture businesses continued to invest in research and development across the sector during this period as cost-of-living pressures rose. Looking ahead, new technology announced during this period could allow wind turbine sites to double as salmon farms, with the projected potential to unlock an additional £4.2 billion in turnover for Scotland's aquaculture sector. Other funds including the £500,000 Aquaculture Innovation Fund was opened in October by the Sustainable Aquaculture Innovation Centre (SAIC) to help further develop collaborative innovation projects that support the sector.

## 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>

### 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/](https://www.seafish.org/insight-and-research/current-and-future-trends/) .

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