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**the support it needs to thrive.**



# Review of Covid-19 impacts on the UK seafood industry:

## January-March 2021

Edited by Martin Harvey and Ana Witteveen

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*July 2021*

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## Introduction

This report is the fourth in a series of reviews on the impacts of the Covid-19 pandemic on the UK seafood sector. It takes a high-level view of the whole of the seafood supply chain to explore the impact on UK seafood markets, seafood business operations and consumer behaviour. This report covers January to March 2021.

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, the global responses to this world-wide pandemic have had wide-ranging consequences for the UK's seafood supply chain.

During January to March, many businesses were also significantly impacted by changes in the trade regulations with the EU following the end of the Brexit transition period.

We have drawn on qualitative and quantitative data available at the time of writing. This includes official statistics, industry insights and published news articles. Links to data sources and other resources are provided at the end for further information.

## Report Status

This report builds on our earlier [reviews of Covid-19 impacts on the UK seafood industry](#) which cover from January to December 2020.

This will be the final report in this series and format. Throughout 2021 we will continue to monitor, analyse and report on factors affecting the UK seafood industry, including Covid-19 and the changing trade relationship with the EU.

## Acknowledgements

A special thanks to those who have shared invaluable industry insights with Seafish. Our thanks also go to colleagues across Seafish who have provided input and feedback on this report.

## Industry Impacts Overview

Early 2021 was an uncertain and volatile period for many UK seafood businesses. Increasing Covid-19 infections and restrictions remained a challenge. Within this restricted operating environment new trade requirements were introduced, following the UK's exit from the EU on 1 January. These changes further complicated operating conditions.

Just before the start of the year the UK re-entered lockdown as Covid-19 case rates rapidly increased across the country. The UK remained in lockdown from January to March. Restaurants were closed to dine-in custom and people were told to stay at home. For many businesses, Covid-safe operating became the new 'status quo'. These businesses reported that the impacts of Covid-19 were ongoing but unchanged from the end of 2020.

Some signs of improvement were seen in February and March. Plans for easing restrictions over the coming months were announced by all UK home nations by the end of March. The Covid-19 vaccine rollout was also well underway with the UK meeting vaccination targets to the end of March. These promising signs gave many businesses hope that domestic markets would recover later in the year.

The situation in other countries remained uncertain. Many European countries increased restrictions in March due to increasing infection rates and limited vaccine roll out. This affected Easter holiday trade. Some businesses do not expect to see significant improvements in these markets until at least the end of the summer.

The UK's transition period for leaving the EU ended on 31 December 2020. The [EU-UK Trade and Cooperation Agreement](#) (TCA) was agreed in late December 2020. This agreement set out the new EU-UK trading relationship. The agreement included the following changes:

- The catching sector was allocated some additional quota and enters a further transition period, with EU vessels still granted access to UK waters.
- Tariff free trade is ensured between the UK and EU, depending on the origin of the traded product.
- Additional paperwork and checks on imports and exports are required.
- The Northern Ireland Protocol takes precedence. Different rules apply to seafood landed in Northern Ireland and seafood traded between Northern Ireland, Great Britain and the EU.
- Businesses that want to employ EU labour need to sponsor candidates under a new points-based system.

Businesses experienced major trade disruptions in January and February as they worked through these changes. The frequency and severity of disruptions reduced as they developed a clearer understanding of the new requirements and could more effectively identify and address issues. However, increased transit time and cost remained an issue to the end of March.

Overall, this was a challenging time for many businesses. A year of the Covid-19 pandemic had already worn down their resilience and financial reserves. Many foodservice and export businesses found themselves in a particularly precarious position.

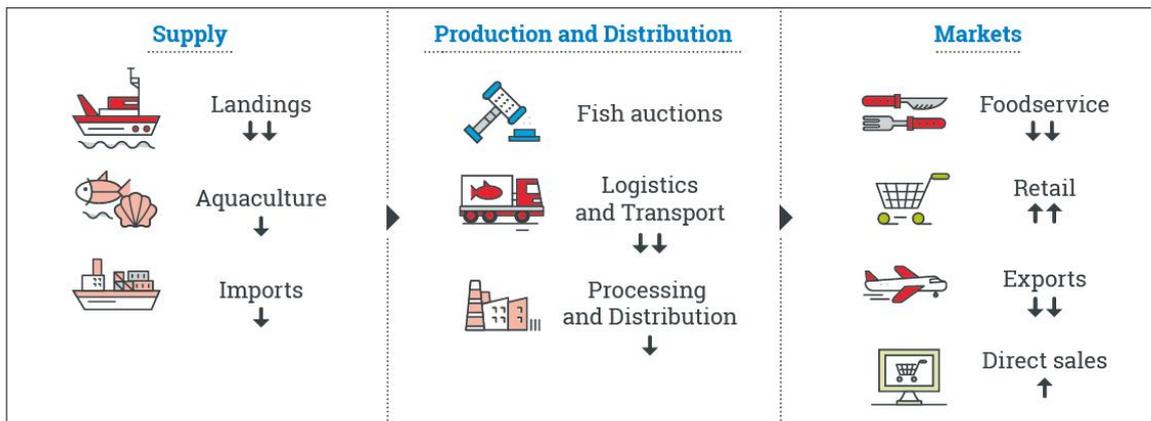
The diagram below shows how Covid-19 and new trading requirements impacted the UK seafood supply chain in January to March 2021.

**Supply Chain: Restrictions return (January-March 2021)**

**Shocks:** The beginning of 2021 was a highly uncertain and volatile period for many UK seafood businesses. Increasing Covid-19 infections and restrictions continued to challenge businesses, with the UK back in full lockdown during this period. New trade requirements were introduced following the UK's exit from the EU on 1 January, further complicating operating conditions.

**Effect of shocks compared to same period in 2020**

- Strong positive effect
- Mild positive effect
- Similar
- Mild negative effect
- Strong negative effect



Further details on business impacts within each area of the supply chain are explained in the following sections of this report.

## Markets

### Key points

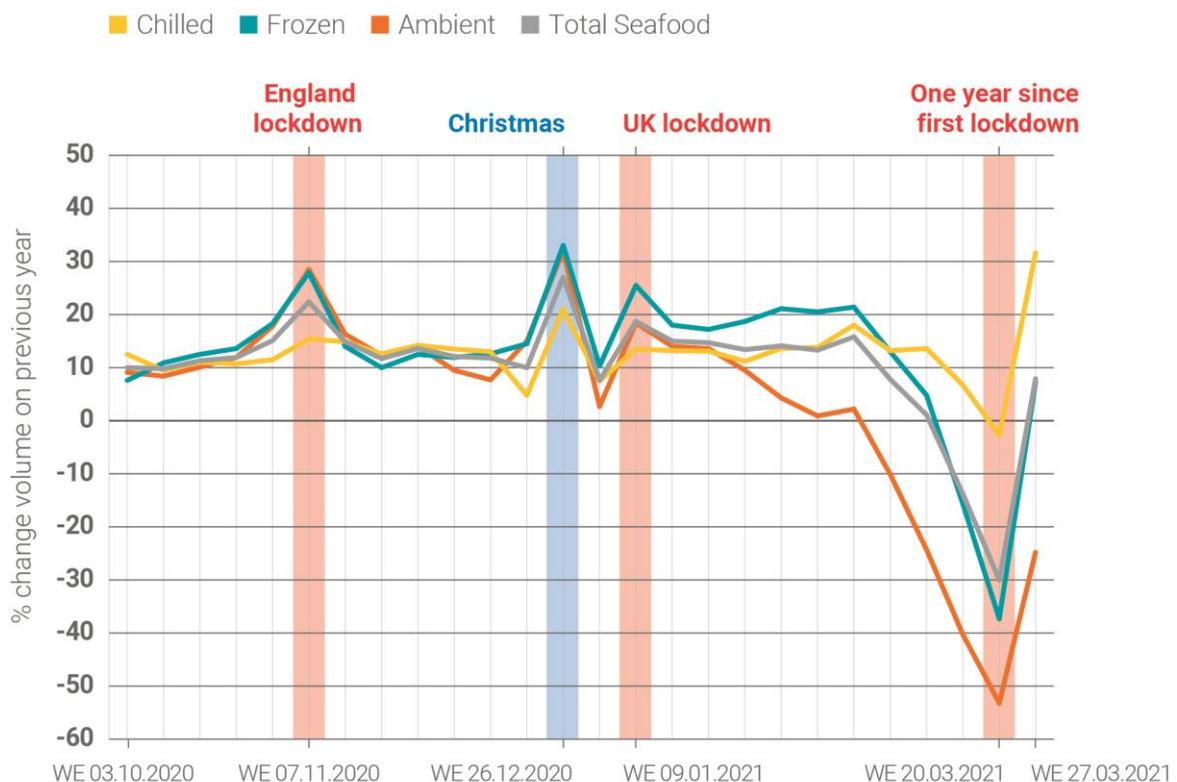
- Retail sales dropped back from the unprecedented increase seen in March 2020 but continued to outperform overall retail sales in recent years.
- Foodservice businesses were limited to takeaway and delivery trade due to lockdown.
- Fish and chip shops outperformed total foodservice, returning to pre-pandemic levels.
- Export demand remained low.
- Businesses that continued to trade with the EU experienced delays and disruptions as new trading arrangements were implemented.
- Small businesses that had embraced selling directly to customers were positive about future business growth, even when restrictions begin to ease.



### Retail

With the UK back in lockdown during January to March, retail sales remained strong. Overall, 2021 retail sales volume remained 14% above pre-Covid levels in January to March. The overall decrease in sales volumes seen in March 2021 compared to March 2020 was 30%. This decline was due to the unprecedented, 63% increase in retail sales volume in the lead up to the first lockdown in 2020.

**Weekly UK seafood retail sales volume**



Frozen seafood proved particularly popular as shoppers continued to make fewer, bigger trips and increasingly shopped online. Frozen products have helped consumers manage the high levels of uncertainty experienced since the start of the pandemic, providing good value and little waste. Frozen ‘family favourites’ like battered-, breaded- and fish fingers continued to see high demand in January to March.

As businesses considered which new products to launch this year, big brands focussed on retaining new customers. By offering easy and exciting products that can be prepared at home, brands hope to retain custom when foodservice reopens. Young’s, for example, launched new frozen products in the retail market following the boost in consumer demand for frozen seafood since the start of the pandemic<sup>1</sup>.

Chilled seafood sales growth was also strong, despite reduced footfall in retail stores as consumers continued to embrace online ordering and deliveries. As many supermarkets had closed their fish counters before the start of the pandemic, the share of chilled sales volume via counters decreased from 12% in 2019 to 6% in 2021. Consequently, the sale of pre-packed chilled products has increased its share<sup>2</sup>.

With more people furloughed or working from home, many have had more time to cook from scratch, using more chilled seafood products. Consumers also used chilled seafood to try to recreate restaurant meals at home during lockdown.

As with frozen, ambient (tinned) product is also a convenient product format for people to bulk buy and store for longer periods of time. Since the massive increase in sales volume around the time of the first lockdown, sales have dropped back but were still 6% above 2019 levels during January to March.

UK retail 2021 compared to 2020				
	Chilled	Frozen	Ambient	Overall
Value (Jan-Mar)	+14%	+9%	-17%	+7%
Volume (Jan-Mar)	+13%	+6%	-14%	+4%

Since the start of the pandemic, consumers have changed how they shop, and grocery retailers have responded. According to an [industry spotlight report](#) on the new grocery retail journey, 46% of retailers reported a decrease in store visits. 85% said they saw an increase in online sales.

Both Tesco and Sainsbury’s reported<sup>3</sup> doubling their delivery slots since March 2020 in response to the pandemic. Further research<sup>4</sup> suggests that this shift online is here to stay with fewer buying trips and more online orders predicted.

<sup>1</sup> <https://www.intrafish.com/markets/youngs-seafood-turns-to-basa-for-its-new-retail-launch-at-tesco/2-1-980379>

<sup>2</sup> <https://www.intrafish.com/finance/hilton-seafood-gobbles-market-share-as-fish-counter-closures-prompt-shift-to-pre-packed/2-1-1015190>

<sup>3</sup> <https://www.bbc.co.uk/news/business-55557908>

<sup>4</sup> <https://www.intrafish.com/markets/revolutionary-shifts-in-seafood-retailing-are-here-to-stay-experts-say/2-1-955175>

Generally, grocery retail businesses continued to see strong sales during January to March. Data shows that with the exception of Co-op, all multiple retailers increased their sales volume compared to the year ending March 2020. Aldi, Ocado, Farmfoods, Lidl, Morrisons, and Iceland all increased their market share, while Sainsbury's maintained market share and Tesco, Asda and Waitrose lost market share. The boost in market share for Iceland in particular highlights the increased demand for frozen foods. Ocado's increased share, as an online-only retailer, demonstrates the move to online shopping for many.

Brands also identified new opportunities via partnerships with recipe box companies<sup>5</sup>. Since the start of the pandemic, meal kit delivery businesses like Hello Fresh and Gousto have benefited from increased product and name recognition as people prepared more meals at home.

Meanwhile, independent fishmongers continued to profit from increased interest in 'buying local' with shoppers staying closer to home<sup>6</sup>.

### Retail sourcing issues in Northern Ireland



Alongside increased demand driven by lockdown restrictions, some shoppers in Northern Ireland faced limited choice during January and February due to issues with groupage and the paperwork required for individual consignments coming from Great Britain. Associated delays reduced the shelf life of products and made it more difficult for retailers to restock.

Other issues cropped up for Northern Irish independent retailers trying to source less common species where the added requirements to ship small quantities was deemed too high by suppliers in Great Britain. Denholm Fishselling Ltd in Portavogie supplies many of these businesses. Director, Sam Mawhinney, explained:

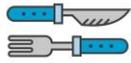


***“A core part of our business is operating a daily refrigerated fish transport service between Scotland and Northern Ireland to supply a range of businesses from family run fishmongers to large wholesalers in Northern Ireland and the Republic of Ireland.***

***“Since January, transporting mixed consignments across the Irish Sea requires a lot more paperwork, specifically for Health and Catch Certificates which must be provided for each individual consignment. Because of this added resource burden, sourcing fish from Scotland is costing more now, resulting in less choice and higher costs for some customers.”***

<sup>5</sup> <https://www.foodnavigator.com/Article/2021/02/10/What-does-2021-and-the-new-normal-have-in-store-for-seafood>

<sup>6</sup> <https://inews.co.uk/inews-lifestyle/food-and-drink/independent-food-shops-enjoy-record-2020-shoppers-local-lockdown-907390?fbclid=IwAR3fqBwwQm7ka5XVw52s0EAlt2EILke8px3SsHTHgRNs0IbQxFU6pcSZCTc>



## Foodservice

Lockdown restrictions suppressed foodservice trade during January to March. Businesses were largely limited to offering takeaways, home delivery, and at-home meal kit options.

As delivery demand continued to boom, many businesses sought innovative ways to meet this demand and connect with customers<sup>7</sup>. Digital technology has supported this growth by making it quicker and easier for customers to order out of home. Early signs indicate that this is a change in habit that is likely to stick with consumers. Household spend on home delivery remained consistent through 2020 and into 2021, even when restrictions eased and out of home spending started to recover in summer 2020.

According to the latest data, seafood delivery orders grew across all foodservice channels during January to March, up 10% overall compared to 2020. A small sample of [panel data from the NPD Group](#) shows growth was particularly strong for full-service restaurants, seeing an overall increase of 25% for seafood delivery visits.

Picking up on this market development, food delivery platforms announced plans to expand their services<sup>8</sup>. This gave more restaurants around the UK the option to grow delivery sales.

Mourne Seafood in Northern Ireland is one business that intends to keep building on their new online sales and delivery platform, '[Mourne at Home](#)', for pre-prepared meals. This approach comes even as they make plans to reopen their dine-in restaurants when lockdown restrictions lift. Bob McCoubrey, owner of Mourne Seafood commented:

***“We’ve had huge success with ‘Mourne at Home’ since launching it during the first lockdown and plan to maintain this offering even after we are able to reopen our restaurants for dine-in service in the coming weeks.”***

And this isn't the only change started during Covid-19 that Mourne Seafood plans to keep. Bob added:

***“Following the success of the large outdoor dining space we opened last year between lockdowns, al fresco dining may be something else that is here to stay post-Covid. It has given Belfast a more vibrant and European feel and we’re planning to build on this when restrictions ease later in the spring.”***

Takeaway demand also remained strong during January to March, with fish and chips proving particularly popular<sup>9</sup>. Usually, the early part of the year is a 'quiet' time for fish and chip sales. However, some businesses reported unusually high demand for the time of year. This was facilitated by continued growth in 'click and collect', online ordering and home delivery sales.

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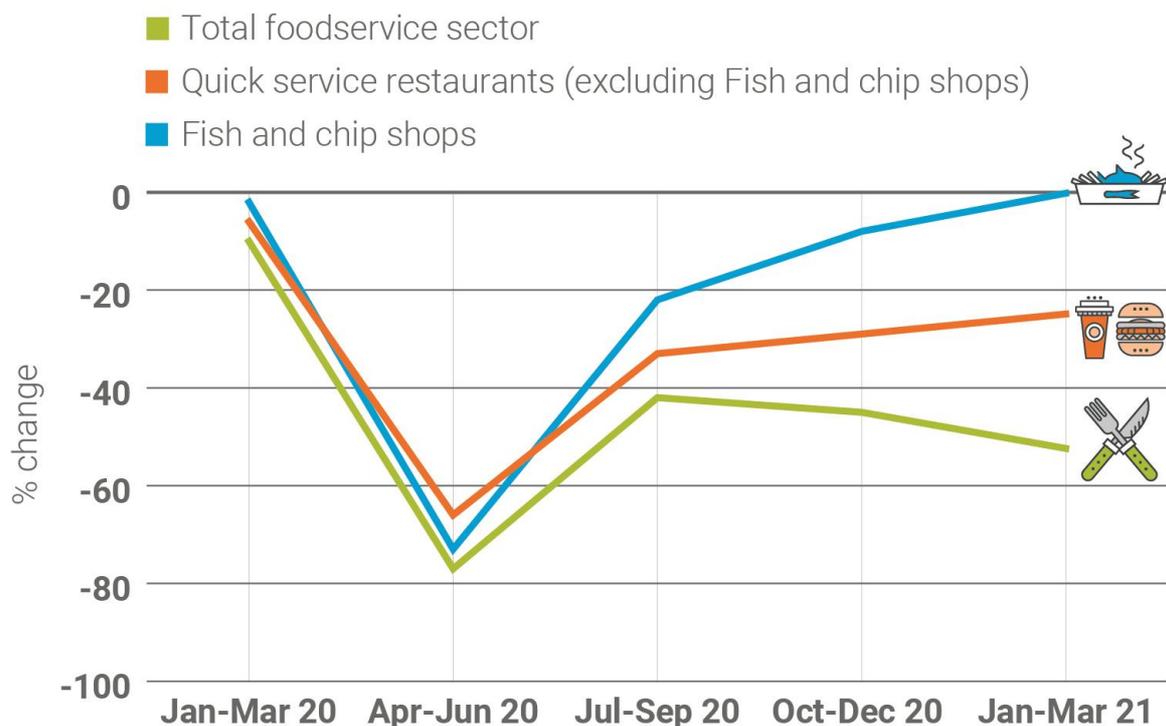
<sup>7</sup> <https://www.bighospitality.co.uk/Article/2021/02/17/The-unstoppable-growth-of-delivery-in-the-restaurant-sector-Deliveroo-Just-Eat-Uber-Eats>

<sup>8</sup> <https://www.foodserviceequipmentjournal.com/breaking-news-deliveroo-to-ramp-up-restaurant-delivery-services-in-100-new-locations/>

<sup>9</sup> <https://www.cateringtoday.co.uk/news/food/takeaways-and-deliveries-soar-346-in-march>

This upturn was welcomed because at the end of 2020 fish and chip shop visits were down around 25% and spend was down 21%. The Fish and Chip shop trade continued to recover more quickly than all other 'out of home' seafood channels in early 2021. By the end of March, fish and chip shop visits were only 0.2% below pre-pandemic levels and outperforming all other channels including total foodservice.

### Foodservice by visit, change on previous year



Demand for fish and chips is expected to remain strong as restrictions begin to ease later in the year. With many expecting to holiday closer to home this year, consumers have named fish and chips as one of the top meals they are looking forward to enjoying with family and friends<sup>10</sup>.

During January to March, many fish and chip shop operators continued to operate more streamlined opening hours and reduced menus to increase efficiency and reduce waste. By the end of March, fish and chip businesses began anticipating changes in demand. They expected competition to increase as restrictions ease and customers have more dining options.

When plans to ease restrictions were announced, foodservice businesses started thinking about reopening dine-in services in April and May. Some expect an increased push for British seafood in 2021 as seafood suppliers look to replace lost export markets with domestic sales<sup>11</sup>.

<sup>10</sup> <https://www.traveldailymedia.com/taste-buds-set-to-guide-sensory-starved-brits-travel-plans-post-lockdown/>  
<sup>11</sup> <https://www.bighospitality.co.uk/Article/2021/02/25/African-food-veganism-egg-based-restaurants-British-fish-and-leafy-greens-are-the-dish-trends-of-2021>

As restaurants plan to reopen there is still much that remains uncertain, including the risk of local 'lock-down' restrictions in response to Covid-19 hot spots. Foodservice businesses therefore need to remain flexible. Data from the monthly Market Recovery Monitor suggests that around 40% of licensed premises have some outdoor space<sup>12</sup>. According to the same survey, only 12% of casual dining restaurants have outdoor space. For those businesses able to offer outdoor seating, demand is still likely to be weather-dependent.

The value of the UK restaurant sector is expected to grow by over 30% in 2021 after a 53% market contraction in 2020<sup>13</sup>. But not all foodservice businesses will reopen. [Research by the Evening Standard](#) shows that more than 800 branded restaurants, bars and coffee shops have permanently closed since the start of the pandemic. It is expected that the wider hospitality sector will take longer than others to recover jobs lost in 2020. Pre-Covid levels of growth are not expected to return until 2023<sup>14</sup>.



## Exports

As was widely reported, exporters faced significant and varied problems from January to March. Problems were primarily due to the ongoing impacts of Covid-19 on seafood supply chains and disruption associated with [new trading arrangements](#) with the EU.

Covid-19 restrictions in key international markets continued to cause trade challenges. With much of the global foodservice sector restricted, export demand for UK seafood was limited.

The ongoing pandemic situation led to an increase in trade frictions with China, a key trading partner. In January, China stepped up testing and inspection of imported frozen seafood<sup>15</sup>. This was reportedly to prevent Covid-19 outbreaks after authorities repeatedly reported detecting Covid-19 on imported frozen products. In mid-January, Chinese authorities proposed<sup>16</sup> new Export Health Certificates (EHC) for fishery products exported to China.

Trade with the EU was also severely disrupted, particularly in January. While ongoing Covid-19 restrictions suppressed demand, businesses that continued to trade with the EU experienced delays and disruption under the new trading arrangements.

At the end of the transition period, gridlocks and long border queues did not materialise to the extent that was initially feared in a 'worst-case' scenario. However, many businesses faced issues related to the introduction of new IT systems and requirements for new documentation including health certificates, customs documentation and catch certificates.

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<sup>12</sup> <https://www.standard.co.uk/news/uk/alixpartners-pubs-england-scotland-london-b926740.html>

<sup>13</sup> <https://www.bighospitality.co.uk/Article/2021/03/03/Value-of-UK-restaurant-sector-expected-to-grow-by-a-third-in-2021>

<sup>14</sup> <https://www.bighospitality.co.uk/Article/2021/01/19/Hospitality-sector-expected-to-employ-fewer-people-in-2023-than-in-2019>

<sup>15</sup> [https://www.undercurrentnews.com/2021/01/15/chinas-customs-strengthens-coronavirus-inspections-on-frozen-seafood-imports/?utm\\_campaign=ca3f6971c5-Retail\\_foodservice\\_Jan\\_20\\_2021&utm\\_medium=email&utm\\_source=Undercurrent%2bNews%2bAlerts&utm\\_term=0\\_feb55e2e23-ca3f6971c5-92556613](https://www.undercurrentnews.com/2021/01/15/chinas-customs-strengthens-coronavirus-inspections-on-frozen-seafood-imports/?utm_campaign=ca3f6971c5-Retail_foodservice_Jan_20_2021&utm_medium=email&utm_source=Undercurrent%2bNews%2bAlerts&utm_term=0_feb55e2e23-ca3f6971c5-92556613)

<sup>16</sup> This was challenged by the UK Government. While the UK Government awaits feedback from the General Administration of Customs of the People's Republic of China (GACC) on the UK's counterproposals, UK businesses exporting to China continue to use the existing EHC format.

Issues with these new systems and requirements led to delays and disruptions for exports from Great Britain, impacting on supply chains. Many of these issues related to groupage consignments. Groupage is where logistics companies consolidate consignments from multiple suppliers into a single consignment for export. Problems were found where a single documentation error would hold up the entire consignment until the errors were corrected. Lack of clarity around the source of errors caused further confusion for many businesses.

Inspections and checks on the EU side led to further delays. In some cases, different Border Control Posts in the EU interpreted the new rules differently. This meant that a consignment which was considered compliant in one country was not deemed compliant in another. These inconsistencies drove further frustrations amongst exporters.

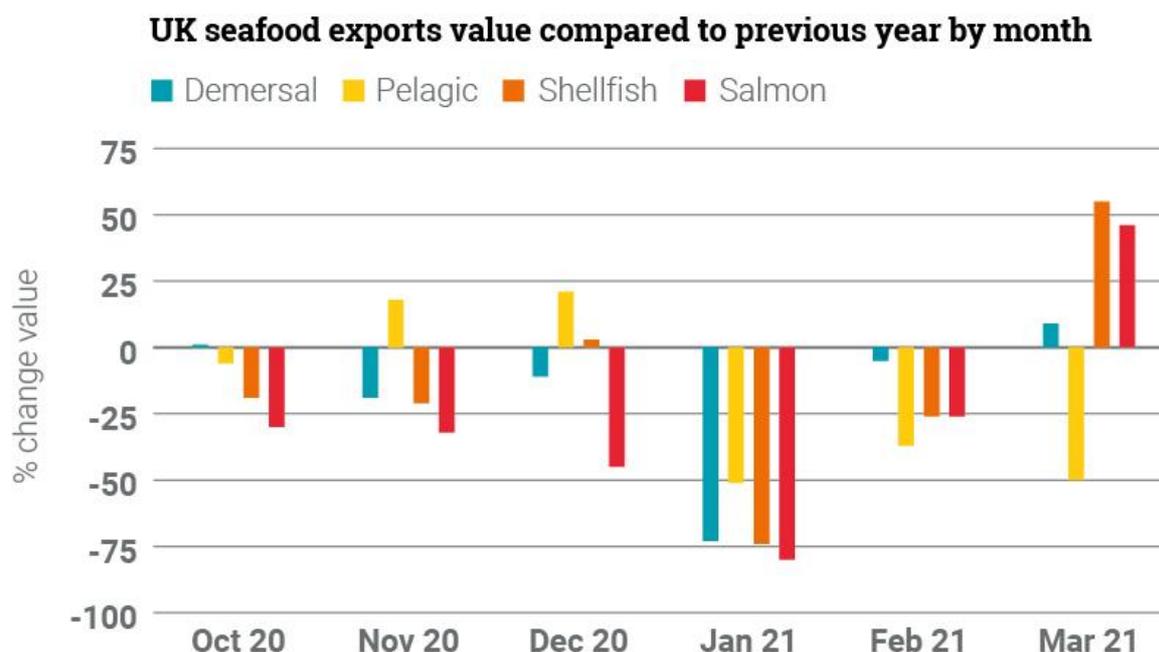
These issues did not affect every consignment, and many could be resolved relatively quickly. However, the increased uncertainty and decreased reliability of goods exported from Great Britain caused reputational issues for seafood exporters.

With many businesses unable to guarantee product delivery dates, some worried about losing critical markets to other suppliers. This was a particular problem for live and fresh seafood exporters. Santiago Buesa, of SB Fish in Troon, Ayrshire, [was quoted in the Guardian](#) in early January explaining the impacts of export delays on his business:

***“Our customers are pulling out. [We offer] fresh product and the customers expect to have it fresh. [Because of delays] they’re not buying. It’s a catastrophe.”***

Though some immediate losses may have been covered with new government support schemes, any permanent loss of custom could have longer term consequences for affected seafood businesses. Furthermore, not all businesses were able to claim for losses. Those that chose not to export in January to avoid disruption were not eligible for government support as they could not demonstrate concrete trade losses.

Actual and expected trade disruptions resulted in significantly reduced trade volumes during January to March. Businesses that went ahead with trading in January faced disruptions and delayed consignments. Other businesses chose not to export in January to avoid expected disruption.



In January, export value to the EU dropped 85% compared to 2020, while total export value was down 75%<sup>17</sup>. January export volume to the EU was down 81% and total export volume dropped 64% compared to January 2020. In response, there was a collective effort to try and tackle export issues as they arose. This included the formation of the [Scottish Seafood Taskforce](#).

Some businesses handled groupage issues by sending fewer, larger consignments or cutting out smaller consignments. Others, that previously exported a small amount to the EU, found the new costs uneconomical and decided to stop this trade. Some of these businesses then reduced staff in line with their decrease in production. The UK Government also worked closely with various EU member states to harmonise understanding and implementation of the new rules on either side of the border.

As paperwork and logistics issues declined in frequency and severity, the reduction in trade seen in January generally slowed in February and began to improve in March. By the end of March, reports began to emerge that exports were moving at a reasonable pace<sup>18</sup>.

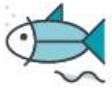
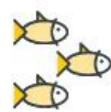
Nonetheless, many businesses reported higher associated costs, well above what had been anticipated. David Leiper, Managing Director of Seafood Ecosse, a processor and exporter based in Peterhead explained:

***“Compared to the same time last year, our overall costs are up around 27% as a result of the new paperwork requirements. These added costs are coming straight off our bottom line.”***

These additional costs came at a time when many businesses were already in a particularly challenging financial position after a year of pandemic impacts on their raw material supplies, workforce, and markets.

<sup>17</sup> Data are provisional. A delay in submissions to HMRC means that further data amendments are anticipated.

<sup>18</sup> <https://www.lincolnshirelive.co.uk/news/local-news/boston-shellfish-company-awarded-first-5060794>

UK exports 2021 compared to 2020					
	Demersal	Pelagic	Shellfish	Salmon	Overall
Value (Jan-Mar)	-23%	-46%	-23%	-27%	-32%
Volume (Jan-Mar)	-17%	-65%	-37%	-2%	-41%

Overall, the value of exports to the EU by the end of March was 30% less than the same period in 2020.

Shellfish exports saw the greatest reduction for a few key reasons:

- Depressed markets due to Covid-19 restrictions in key export countries.
- Shellfish exports were more likely to rely on groupage and required more paperwork due to product variation.
- Many operators trade on a flexible volume basis due to the nature of live crustacean fishing and some struggled to secure export health certificates quickly enough with such short lead times.
- Live bivalve mollusc (mussel, cockle, clam, scallop and oyster) exports all but stopped<sup>19</sup> in January. This followed an EU ban on all live bi-valve molluscs (LBM) not fit for human consumption at the point of export, or those from class B and C waters<sup>20</sup>.

Fresh demersal whitefish exporters also struggled with groupage issues and depressed European demand. Some UK demersal vessels landed directly to the EU to limit transport and logistics issues or in some cases to achieve better prices.

Salmon exports were severely disrupted in January but recovered more quickly than shellfish in February. Single species loads, like salmon, proved simpler and quicker to inspect and process. As a result, these consignments began to be prioritised at the new major transport hubs set up in Scotland. Speeding up processing of these single consignment loads then allowed more resource to handle complex groupage consignments.

Pelagic exports were less impacted by delays and disruption as these products are less dependent on European hospitality markets. They are also sent as single consignments (similar to salmon), requiring less paperwork. Historically, the pelagic industry largely exports product to non-EU countries and was therefore already accustomed to handling much of the additional documentation required.

<sup>19</sup> Seafish estimates that the UK's LBM trade to the EU made up around 3% of total shellfish exports to the EU in 2019 by value and 11% by volume. LBM grown in Northern Ireland were not impacted by the export ban, however Great Britain exports to Northern Ireland were impacted.

<sup>20</sup> LBM for direct human consumption must be placed on the EU market via a dispatch centre. As LBM from Class B or C production areas cannot meet the public health requirements for dispatch centres, they cannot be exported to the EU, even if destined for a purification centre. Nearly 70% of UK waters are class B and C and most UK businesses in this sector are modelled on export to Europe so have no other market for their product. Further information on the classification of LBM waters and regulatory requirements for delivering LBM to market is available in the [Seafish "Classification of bivalve harvesting and production areas" guide](#) and on the [Seafish "Delivering Safe Bivalves to the Market" webpage](#).

[Rules of origin](#)<sup>21</sup> impacted some exporters. Businesses that exported products with raw material that originated outside of the European Economic Area (EEA)<sup>22</sup> were subject to new tariffs of up to 18%.



## Direct Sales to Consumers

Direct sales continued for those established in the market. Smaller, more adaptive businesses that had found ways to 'cut out the middleman' and get their products direct to customers during lockdown reported feeling positive about their business models as they anticipated the easing of restrictions.

These businesses likely benefitted from the shift seen in people's diets and buying habits since the start of Covid-19, with more people buying food locally or growing their own<sup>23</sup>.

Pesky Fish found new opportunities to grow when Covid-19 struck. The business was founded in 2017 to connect fishermen directly with wholesalers, retailers, restaurants and home chefs via an online marketplace. It has continued to boom in 2021, building on its new direct home delivery service. Rob O'Shea, Head of Consumer at Pesky Fish explained:

***"We have built up a really strong, loyal following of home chefs since the start of the pandemic when we started offering direct home deliveries. Because of the traceability, provenance and story that comes with each order, customers can create a real dining experience at home."***

***"As foodservice returns we expect sales to grow to accommodate demand from both professional and home chefs, providing fresh seafood for both the dining-in and dining-out experience."***

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<sup>21</sup> Rules of origin are the criteria needed to determine the national source of a product, which then determines the duties and restrictions associated with importing and exporting the product.

<sup>22</sup> These are not included in the tariff-free arrangement agreed in the UK-EU TCA.

<sup>23</sup> <https://www.food.gov.uk/news-alerts/news/food-in-a-pandemic-report-published>

## Production & Distribution

### Key points

- Ongoing logistical issues related to Covid-19 challenged businesses.
- New trade requirements heavily impacted transportation and logistics for EU-UK trade.
- Processing businesses faced a range of supply and demand constraints during January to March.
- Covid-19 continued to impact the UK workforce.
- Systematic asymptomatic testing helped control the spread of the virus in factories.
- Onshore training continued to be delivered successfully online.
- In-person training for offshore workers remained limited due to lockdown restrictions.



### Transportation & Logistics

Businesses struggled to get goods out through both air and sea freight routes during January to March. Due to ongoing global Covid-19 restrictions, many flights were cancelled, limiting air freight capacity and frequency. The global reduction of available empty containers in major producing countries (like China) remained an issue.

Covid-related changes to staffing at ports worldwide caused further delays in the release of containers<sup>24</sup>. As a result of these supply and demand problems, some container rates<sup>25</sup> were prohibitively expensive<sup>26</sup> for businesses. Some lead times were also impractically long.

New rapid testing centres were opened for commercial drivers travelling between the UK<sup>27</sup> and EU<sup>28</sup> to limit the spread of Covid-19 and help prevent another hard border closure between the UK and France like that seen before Christmas. Rapid tests were free for drivers and expected to give results within an hour of testing, limiting transport disruption.

In addition to ongoing logistical issues related to Covid-19, new trade requirements heavily impacted on transportation and logistics for UK businesses. Bottlenecks in the supply chain continued to be identified and addressed throughout January to March as new routes, check points and transport hubs were operationalised.

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<sup>24</sup> <https://www.bbc.co.uk/news/business-55740063>

<sup>25</sup> [https://www.undercurrentnews.com/2021/01/25/chinese-pollock-plants-close-early-as-freight-rates-rocket-flow-of-hg-grinds-to-halt/?utm\\_campaign=54529b95d6-Editor\\_s\\_recap\\_Feb\\_01\\_2021&utm\\_medium=email&utm\\_source=Undercurrent%2bNews%2bAlerts&utm\\_term=0\\_feb55e2e23-54529b95d6-92556613](https://www.undercurrentnews.com/2021/01/25/chinese-pollock-plants-close-early-as-freight-rates-rocket-flow-of-hg-grinds-to-halt/?utm_campaign=54529b95d6-Editor_s_recap_Feb_01_2021&utm_medium=email&utm_source=Undercurrent%2bNews%2bAlerts&utm_term=0_feb55e2e23-54529b95d6-92556613)

<sup>26</sup> [https://unctad.org/system/files/official-document/presspb2021d2\\_en.pdf](https://unctad.org/system/files/official-document/presspb2021d2_en.pdf)

<sup>27</sup> <https://www.bbc.co.uk/news/world-europe-55840527>

<sup>28</sup> <https://www.bbc.co.uk/news/business-56531330>

New limitations on where vessels could land seafood catches came into effect from 1 January. In the Republic of Ireland<sup>29</sup>, there were no designated landing ports for UK vessels until February. Once addressed, these new designations as well as new ferry routes to Dublin helped ease trade disruption between Northern Ireland and the Republic of Ireland. New routes and transport hubs were also operationalised in Great Britain to coordinate the export of live and fresh (short shelf life) products. In Scotland three new trade hubs began to coordinate groupage and prepare all the required export paperwork for consignments.

This system had a bumpy start with paperwork errors causing serious delays to seafood consignments in January and into February, particularly for groupage. Lack of clarity around the source of errors caused further delays.

Due to these issues, some major haulier companies temporarily stopped groupage consignments with small, consolidated vehicles until the situation improved. As a result, some businesses avoided using transport hubs altogether which put more pressure on direct export channels.

The groupage situation slowly but steadily improved, thanks largely to good communication between seafood businesses and haulier companies. Despite these improvements, businesses confirmed that by March exports were still taking one day longer to reach their destination, on average. These delays were costly for businesses that built their reputation on next day fresh and live seafood deliveries.

Others supplying chilled product to retailers in Northern Ireland and the Republic of Ireland on a daily basis also faced groupage issues. Some suppliers were left with concerns that these retailers would stop sourcing products from Great Britain to avoid new trade frictions.

Businesses also highlighted the importance of finding the right import or export agent to ensure good access to EU markets and cited the availability of certifying officers as a major challenge for some businesses requiring health certificates for their products.

Limited transportation and logistics disruptions related to the end of the transition period were cited by seafood importers as the implementation of equivalent checks and paperwork on EU imports to the UK was delayed until later in the year.

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<sup>29</sup> Designated landing ports are ports in EU Member States where landings and transshipment operations of fishery products are allowed, and port services are accessible for third-country fishing vessels.

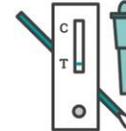
### Covid-19-related factors impacting on exports...



Limited air freight capacity



Global imbalance in shipping containers



Driver testing requirements

### + Brexit-related factors impacting on exports...



New IT systems



New paperwork requirements



Inspections and checks



Availability of certifying officers



Groupage issues



Lack of designated landing ports

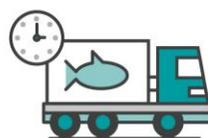


Bottlenecks in the supply chain

### Led to...



Delays



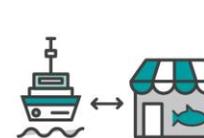
Extended lead-in times



Increased costs



Exports taking longer



Pressure on direct export channels



Increased uncertainty



## Processing

Processing activity was constrained by both supply and demand challenges during January to March. Businesses serving the domestic hospitality and foodservice sector continued to see reduced demand due to the UK lockdown.

Those supplying export markets had to meet new paperwork requirements following the UK's exit from the EU. New systems and documentation made the job more onerous and costly for some businesses. They also faced ongoing impacts of Covid-19 restrictions on demand, logistics and transport costs.

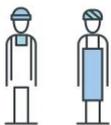
Many of those supplying domestic foodservice and export markets continued to operate at reduced capacity with some staff still furloughed. It is unclear how long businesses will be able to sustain this reduced operating model.

Businesses supplying domestic retail or selling directly continued to see strong demand during January to March. Many focussed on frozen seafood to meet heightened demand.

Increased retail demand put pressure on raw material sourcing for some businesses. Domestically sourced raw material became an issue for whitefish processors as uncertain quota allocations led to reduced landings from the UK fleet. Businesses unable to source sufficient raw material domestically either left orders unmet, risking permanent loss of custom, or turned to imported raw materials.

Businesses that switched to imported raw material for the first time or increased their share of imported raw material had to consider [rules of origin](#) and associated tariff costs. With raw material costs increasing, some businesses also cited concerns about future price inflation and spot pricing for specific species like salmon.

These issues may be exacerbated as demand from the UK foodservice sector increases in the coming months.



## Workforce

Across the supply chain, Covid-19 continued to impact the UK workforce during January to March. At the start of the year, many businesses faced issues with staff illness and absence. Covid safety for employees remained a top priority for businesses across the supply chain.

This was a major issue for large retailers. [Tesco's CEO reported](#) that the retailer had around 30,000 staff absent because of Covid-19, including 7,000 vulnerable staff asked to shield at home. With staff absence rates around 10%, many of the 35,000 temporary Christmas workers were asked to stay on into the new year.

To help keep staff safe and limit the spread of the virus, supermarkets tightened restrictions for customers entering shops. Morrisons<sup>30</sup> announced they would refuse entry to those not wearing face coverings (who weren't medically exempt). Sainsbury's<sup>31</sup> said it would also challenge those who were shopping in groups.

Hull and Northeast Lincolnshire, a key manufacturing hub, became a regional hotspot as infection rates rose across the UK. Some seafood processors experienced factory outbreaks and worked to manage them with systematic [lateral flow testing](#) and case tracing.

Lateral flow tests were highly effective at identifying asymptomatic cases and limiting further spread of infection. These tests allowed carriers to be identified two days before showing symptoms and before they could pass on the virus. They also allowed asymptomatic staff that had been in close contact with a positive case to be tested and return to work sooner. These combined effects reduced the spread of infection in the workplace and limited disruptions to production.

Proactive testing along with the excellent compliance seen across the processing sector allowed businesses to continue to operate safely. With cases effectively managed, the incident management team created in late 2020 in Scotland was formally disbanded.

During January to March, some businesses also reiterated concerns about accessing sufficient labour. Manufacturers started to see shortages of labour on the operating floor and restaurant owners expected to face staff shortages on reopening<sup>32</sup>. This was expected due to workers returning to their home countries or finding other jobs during the pandemic.

Experts called for retraining programmes to help people reskill or transfer their existing skills to new roles or sectors after a year of extended furlough and redundancies across the UK economy<sup>33</sup>. The Scottish Seafood Association, in collaboration with Seafish, led the '[Sea a Bright Future](#)' careers campaign to highlight the range of opportunities available in the seafood sector.

Alongside efforts to recruit, existing employees worked to stay on top of their training requirements. Remote and online training platforms developed during the first lockdown continued to be utilised by onshore workers.

Increased interest for onshore training was seen in January, which may reflect an anticipation of return to work for food handlers. There was also increased demand for food hygiene and quality assessment training for new Port Health Officers, recruited to carry out official border controls on imports.

Changes to LBM export rules led to increased interest in bivalve purification training. To support the need for local authority inspections and approvals, a new [Bivalve Shellfish Hygiene Verification course](#) for environmental health officers was developed. Further demand is anticipated as businesses seek to establish more purification centres in the UK.

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<sup>30</sup> <https://www.bbc.co.uk/news/business-55618408#:~:text=Morrisons%20will%20bar%20customers%20who,unless%20they%20are%20medically%20exempt.>

<sup>31</sup> <https://www.bbc.co.uk/news/business-55618408>

<sup>32</sup> <https://www.ft.com/content/f999d75d-f6ff-44e3-a20b-5281f849714b>

<sup>33</sup> <https://www.peoplemanagement.co.uk/news/articles/third-of-workers-lack-confidence-in-their-ability-to-seek-new-careers>

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While onshore training progressed well through remote delivery, crucial safety training for fishermen continued to be interrupted. Many fishermen's training courses involve practical exercises and drills requiring access to specialist facilities many of which remained closed at the start of the year. When lockdown restrictions eased towards the end of March, 13 of the 19 Seafish-approved fishermen's training providers were able to deliver approximately 30% of the training delivered during the same period in 2020.

The Maritime and Coastguard Agency gave fishermen longer to comply with safety training requirements. However, the ongoing disruption caused by the pandemic continues to present safety concerns<sup>34</sup> with crew unable to complete mandatory and refresher training courses.

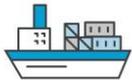
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<sup>34</sup> During this quarter there were three fatal accidents involving UK-registered fishing vessels and five fishermen lost their lives.

## Supply & Primary Production

### Key points

- Many UK businesses reliant on seafood imports did not face significant sourcing issues during January to March, having sufficiently stockpiled frozen material by the end of 2020.
- Many fishermen targeting non-quota shellfish species were impacted by depressed market demand through a combination of Covid-19 restrictions and export disruptions.
- Fishermen targeting whitefish species faced both supply and demand constraints.
- Salmon and shellfish aquaculture faced major export disruption.
- Aquaculture businesses continued to manage ongoing disruptions in production cycles that began in early 2020.



### Imports

Covid-19 continued to impact on UK imports during January to March. Production and exports from China were delayed at the start of the year. This was due to the extended Chinese New Year holiday, additional Covid-19 testing of the Chinese workforce and stricter control measures which impacted production levels in China<sup>35</sup>.

Freight costs to import seafood from China remained well above pre-Covid levels. The 'empty container problem' recognised early in the pandemic which severely imbalanced trade flows through 2020 remained an issue<sup>36</sup>.

Some container ships were reportedly tied up during January to March due to a decrease in trade volume and transport demand. Other ships reportedly lost cargo to storms causing additional disruption to inbound trade. The week-long blockage of the Suez Canal at the end of March disrupted an estimated £7bn of goods each day. It was expected to cause delays to UK-bound shipments in April.

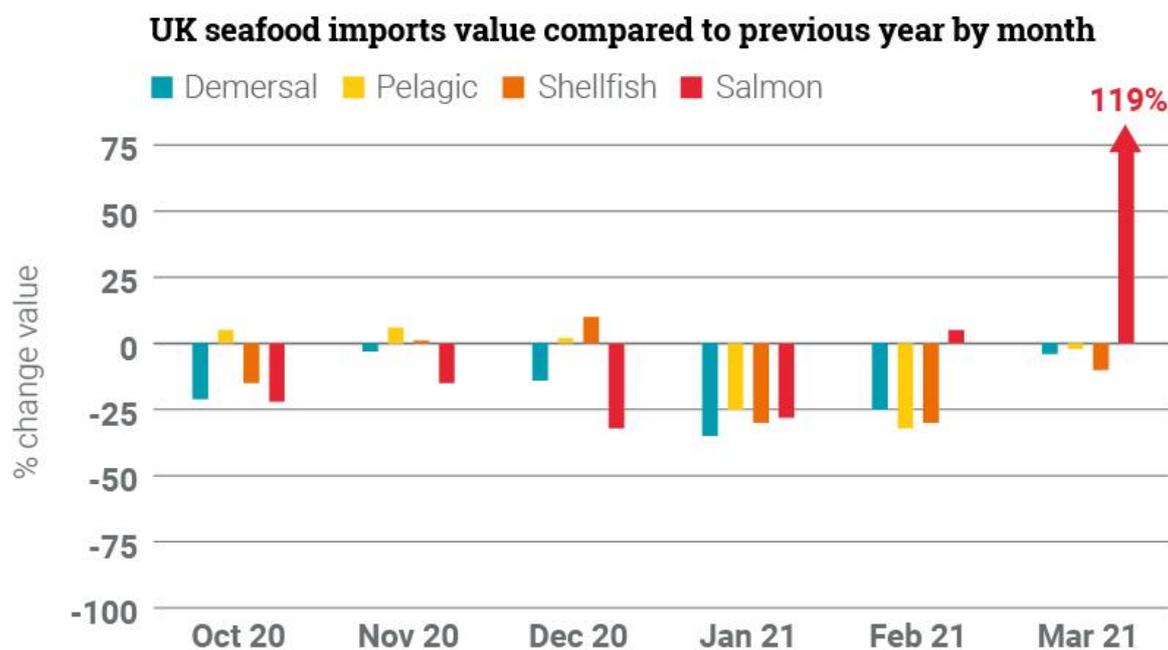
Fortunately, many UK businesses reliant on seafood imports did not yet face detrimental sourcing issues during January to March, having anticipated possible trade issues and sufficiently stockpiled frozen material by the end of 2020. With stockpiles in place, import demand was lower at the start of 2021 than in 2020. Total seafood import value fell nearly 29% in January compared to 2020<sup>37</sup>. The decline slowed in February with value down 16% compared to 2020 and recovered in March, up 18% compared to 2020.

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<sup>35</sup> <https://www.undercurrentnews.com/2021/02/09/major-chinese-processor-expects-delays-to-sectors-startup-after-new-year/>

<sup>36</sup> <https://www.export.org.uk/news/552747/Worlds-shippers-furious-at-chaotic-state-of-ocean-freight-and-call-for-industry-reform.htm>

<sup>37</sup> Data are provisional. A delay in submissions to HMRC means that further data amendments are anticipated.



Overall seafood import value for January to March declined 9% compared to 2020. Import volume dropped by 12%.

UK imports 2021 compared to 2020					
	Demersal	Pelagic	Shellfish	Salmon	Overall
Value (Jan-Mar)	-21%	-18%	-24%	+27%	-9%
Volume (Jan-Mar)	-16%	-22%	-19%	+4%	-12%

New import requirements for EU goods had a limited impact on trade during January to March. Requirements were initially scheduled for a phased approach beginning with new health certificate requirements from April 2021. However, in March the UK government announced a delayed timetable for the introduction of the next stage of UK import requirements. This was to ensure minimal disruption to supply chains as businesses entered a period of Covid-19 recovery.

This postponement had mixed reactions from businesses<sup>38</sup>. Some businesses heavily reliant on imported product welcomed the extra time to prepare for the new requirements. Other businesses regretted the delay in bringing EU trading partners to a level playing field.

Despite the postponement, other new requirements did come into effect from 1 January, impacting UK businesses using imported seafood products. Some businesses in Great

<sup>38</sup> <https://www.export.org.uk/news/556077/Mixed-reaction-from-importers-and-exporters-as-UK-delays-controls-on-goods-coming-from-EU.htm>

Britain bringing in raw material from the Republic of Ireland, Northern Ireland or France, for example, cited issues and uneconomical costs associated with non-tariff barriers.

Rules of Origin also began to impact UK imports from 1 January adding costs and logistic considerations for many UK operators. Businesses importing raw material from third countries and subsequently exporting products to the EU became subject to new tariffs. For example, raw material imported from Iceland or Norway, processed in Great Britain, and then sold into the EU market.

Some loopholes were also identified for non-EU goods transported through the EU to Great Britain. Goods entering the EU for transit through the EU are not normally subject to full veterinary checks. This means that such goods require full checks at a border control post on arrival in Great Britain. Initially this requirement was not universally recognised leading some goods to be checked 'inland' rather than at the border after entering Great Britain.



## Landings

During January to March, fishermen targeting shellfish species were mainly impacted by depressed market demand caused by ongoing Covid-19 restrictions combined with disruptions to seafood exports.

The fleets targeting quota species (specifically whitefish), however, faced a combination of supply and demand issues. Demand was dampened both domestically (foodservice closures) and abroad (foodservice closures and export issues). Supply was also limited due to uncertain access to fishing quota. This led many vessels to tie up or reduce their fishing activity while the markets were poor to save quota until better prices could be achieved.

During January to March, the UK and EU had yet to agree fishing quota allocations between their waters and fleets. As a result, vessels were given provisional quota allocations for the first three months of the year.

The lack of an UK-EU agreement also had knock on effects for the UK fleet's access to Norwegian waters<sup>39</sup>. Norway banned access to UK and EU boats until the UK and EU had reached an agreement on quota allocation. Without access to Norwegian waters, many UK and EU vessels were displaced into UK waters. This led to quota 'pinch points' as early as January for some whitefish species including whiting, hake and cod.

David Anderson, CEO of Aberdeen Fish Producer's Organisation emphasized the scale of this access issue:

***"In a typical year, some of our whitefish boats spend up to 80-90% of the year fishing in Norwegian waters for a certain quality and size of fish."***

And access isn't the only issue. As David explained:

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<sup>39</sup> In 2019, as published by the [Marine Management Organisation](#), around 60% of UK whitefish landings during January to March was from ICES areas 4a and 2a. Both of these areas include Norwegian waters.

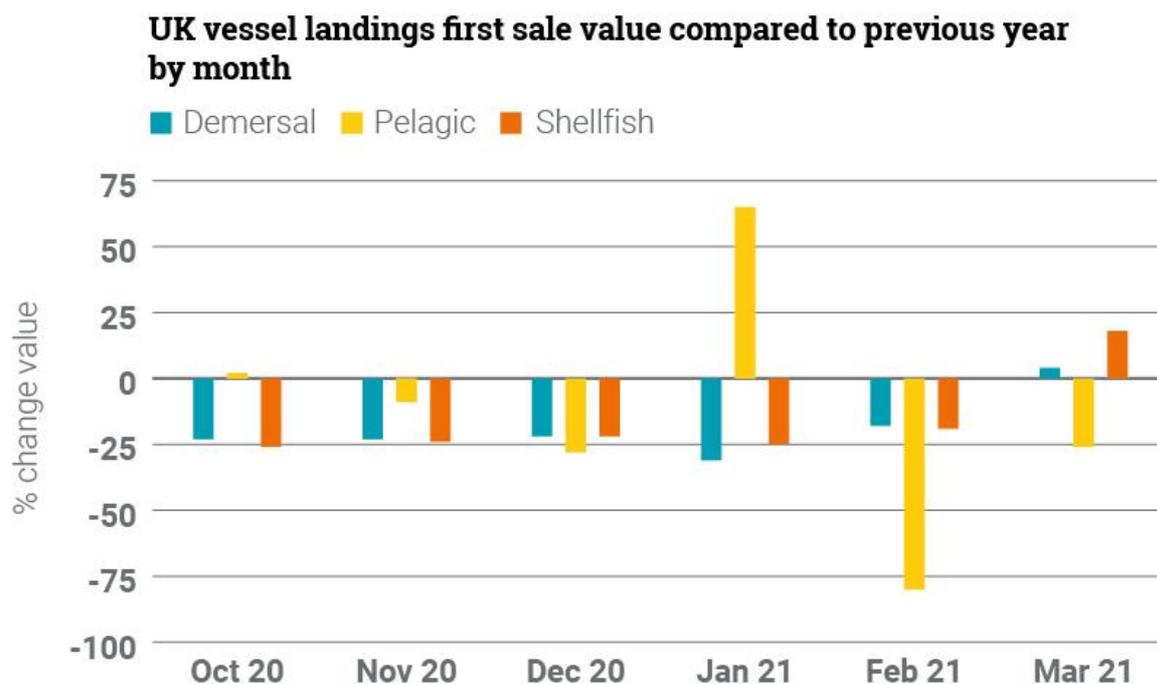
***“New mechanisms for trading quota between the UK and EU member states haven’t been agreed. Re-establishing a system for quota swaps is a top priority for us.”***

Subsequent allocations of UK quota amongst national fleets were also not yet agreed during January to March, leading to further uncertainty.

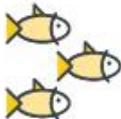
In mid-March, the UK, EU and Norway reached an agreement on six jointly managed North Sea fish stocks. This set 2021 catch limits for cod, haddock, saithe, plaice, herring and whiting. However, the agreement did not resolve quota exchange issues. As a result, a quarter of the way through the year, vessel owners still did not have a clear understanding of their fishing opportunities for 2021.

In response to this uncertainty many fishing businesses changed their fishing patterns. They targeted different areas or species to fit with their provisional quota allocations. Fewer or shorter trips were taken to secure better prices for quota used. In extreme cases fishing businesses opted for self-imposed tie ups until annual fishing rights became clearer or markets improved.

As a result of these supply and demand constraints, both demersal and shellfish landings value was down in January and February compared to 2020.



Overall during January to March, demersal and shellfish landing were significantly reduced compared to 2020, while pelagic landings volume remained fairly steady and value increased.

UK landings 2021 compared to 2020	 Demersal	 Pelagic	 Shellfish	 Overall
Value (Jan-Mar)	-34%	+16%	-32%	-14%
Volume (Jan-Mar)	-31%	-3%	-16%	-10%



## Aquaculture

Ongoing Covid-19 restrictions on foodservice demand and previous disruptions to aquaculture production cycles in 2020 continued to impact producers during January to March.

Shellfish farmers supplying domestic markets faced depressed demand as the high-end restaurant market remained closed. Tristan Hugh-Jones of Rossmore Oysters explained:

***“We have seen a glut of oysters after a year of suppressed demand. There are too many big oysters that need to be harvested to make space for young oysters on the beds but no market for them. As they are now too big to sell into the restaurant trade they have completely lost their value.”***

Salmon and shellfish aquaculture also faced major issues with export delays and disruptions early in 2021. Worries over the reliability of trade routes, the wariness of customers and uncertain prices caused Scottish producers to hold back salmon exports in January and keep fish in the water for longer<sup>40</sup>. They postponed or cancelled harvests to delay European exports until the trade situation stabilised.

However, this was only a temporary measure. In February and March this delayed stock had to be harvested along with the usual harvests. This was to make room for the next cycle of fish being grown to go to sea.

Even with these deliberate delays and cancelled harvests, businesses still faced costs. Some found that customers cancelled contracts due to the unreliability of trade routes. Delays caused by consignments being rejected or held up at the border also resulted in reduced quality and prices.

[The Scottish Salmon Producers Organisation](#) (SSPO), which represents Scottish salmon farmers, estimated losses of £11m in January and February across the sector as a direct result of changes in the regulatory environment following the end of the transition period.

Live bivalve mollusc (LBM) producers operating in class B and C waters<sup>41</sup> were further impacted by an EU ban on their exports, blocking them from pre-EU Exit markets.

<sup>40</sup> [https://issuu.com/fishfarmermagazine/docs/fish\\_farmer\\_february\\_2021/24](https://issuu.com/fishfarmermagazine/docs/fish_farmer_february_2021/24)

<sup>41</sup> See the [Classification of bivalve harvesting and production areas](#) for further details.

Previously, tens of thousands of tonnes of live bivalve molluscs from these waters were sent to the EU for purification<sup>42</sup> before being sold to European consumers.

In 2019 and 2020, most shellfish aquaculture sites across Great Britain had class B water quality. 57% of sites have class B waters all year. A further 14% of sites have class B water seasonally. Only 26% of shellfish waters around Great Britain were class A the entire year. Most of these sites were in Scotland. This effectively meant many of the large-scale shellfish farmers, for instance those in Southwest England and North Wales, could not send their product – in bulk and unpurified form– to the EU for purification.

On 2 February, [the EU clarified](#) that the ban on UK exported unpurified, live bivalve molluscs would not change after new EU regulations enter into force in April (contrary to what was initially hoped)<sup>43</sup>. This was a significant change for UK shellfish aquaculture businesses and led some businesses to explore other business models, including developing their own purification facilities. Others have been unable to resume trade since December 2020.

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<sup>42</sup> LBM from Class B and C waters need to be purified before they are deemed fit for human consumption. Purification (also known as depuration) is done to reduce low-level contamination by bacteria in live bivalve shellfish to a safe, acceptable level for human consumption. Purification is a natural biological process where bivalve shellfish filter sterilised seawater to expel any microbial contamination. For more information check the [Seafish “Bivalve shellfish purification” webpage](#).

<sup>43</sup> This aligns with the approach taken for the import of LBM from other Third Countries into the EU as detailed in [this Seafood Source article](#).

## Government Response<sup>44</sup>

During January to March new seafood specific government support schemes were opened.

In January, a [£23m UK fund](#) was announced for seafood exporters that were most adversely impacted by the Covid-19 pandemic and challenges of adjusting to the new requirements for exporting to the EU. This fund was set up in recognition of the depressed market conditions continuing to face much of the industry due to the pandemic and the additional impacts of the new regulatory environment for exporters under the TCA.

The scheme was targeted at small and medium enterprises and the maximum claim available to individual operators was £100,000. The scheme opened on 9 February. Businesses were required to evidence a “genuine loss in exporting fish and shellfish to the EU”. Support was to be made available immediately and paid retrospectively to cover losses incurred since 1 January 2021.

Businesses exporting during January to March and able to document costs of disruption were eligible to make a claim. However, businesses who took the precautionary decision to suspend trade in January to avoid disruption were not able to claim for lost revenue.

In February the [Seafood Response Fund](#) was announced with additional support for the catching and aquaculture sectors.

Other, home nation specific, schemes were announced in February and March:

- In Northern Ireland, further [aquaculture support](#) was announced to address losses from the impacts of the Covid-19 pandemic.
- In Wales, [two packages of support](#) were announced. The first was for fishermen to help with ongoing Covid-19 impacts as well as the impacts of the end of the transition period on the shellfish sector. A second dedicated package of support was announced for large scale LBM exporters.
- In Scotland, a [£7.75m fund](#) was allocated to help the sector deal with the impact of Covid-19 and the end of the transition period. The fund provided support to fishermen, seafood businesses and harbours. [£6.45m of this fund](#) was dedicated to the Seafood Producers Resilience Fund to support trout farmers and the shellfish sector. £1m was made available to support investment plans for ports and harbours faced with a loss of income from landing fees.

[Further support](#) for businesses in the retail, hospitality and leisure sectors was also announced.

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<sup>44</sup> A full list of government support measures can be found on the [UK Government Coronavirus Business Support webpage](#).

## References and Data Sources

### Retail

Data Source: Nielsen Scantrack UK year ending 27.03.2021.

Reference:

- Seafood in retail factsheets:  
<https://www.seafish.org/insight-and-research/retail-data-and-insight/>

### Foodservice

Data Source: The NPD Group (March 2021) Foodservice COVID-19. *Foodservice data are only available at the level of Great Britain, rather than United Kingdom.*

Reference:

- 2021 Q1 Seafish COVID-19 Seafood in foodservice factsheet:  
<https://www.seafish.org/document/?id=c14fb7c6-3396-497a-b807-7cd4ad813110>

### Trade (Imports and Exports)

Data Source: HMRC monthly data via Business Trade Statistics (BTS), processed by Seafish. 2021 data are provisional. 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, Megrim, 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:

- 2020 Seafish Provisional Seafood Import and Export Summary Factsheet:  
<https://www.seafish.org/insight-and-research/import-and-export-data-and-insight/>
- Seafish Trade and Tariff Tool:  
<https://public.tableau.com/profile/seafish#!/vizhome/SeafishTradeandTariffTool/Overview>

### Landings

Data Source: MMO monthly landings statistics. 2021 data are preliminary.

<https://www.gov.uk/government/collections/monthly-uk-sea-fisheries-statistics#2021>

### Real-time industry data

Data source: Seafish horizon intelligence, January-March 2021. 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.

<https://www.seafish.org/insight-and-research/current-and-future-trends/>

**For more information please contact:**

**Ana Witteveen  
Economist**

T: (0131) 524 8659

E: [ana.witteveen@seafish.co.uk](mailto:ana.witteveen@seafish.co.uk)

**Seafish**  
18 Logie Mill  
Logie Green Rd  
Edinburgh  
EH7 4HS

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