

# 2020 Seafish UK Seafood Value Chain Provisional Data

Finalised sources:

- The NPD Group CREST® GB December 2020
- NielsenIQ ScanTrack UK including discounters MAT 26.12.20

Provisional sources:

- HMRC via BTS December 2020
- Fisheries Administration in the UK landings table December 2020
- Cefas 2018 data



Here to give the UK seafood sector  
**the support it needs to thrive.**

# Summary

During 2020 the supply and demand of seafood was seriously challenged by the global Corona virus pandemic:

- In 2020 the supply of seafood for human consumption to the UK was valued at £4.8bn. This was 11% less than in 2019 as supply from all channels had decreased.
  - The majority of UK seafood is sourced from abroad with 68% of value coming from imports worth £3.2bn, 7% less than last year. Included within the import value were £53m worth of seafood landed within the UK by foreign vessels. These landings were worth 28% less in 2020.
  - The UK supplied 32% of it's own seafood worth £1.5bn, 19% less than the previous year. The majority of this supply, £962m was from aquaculture (based on 2018 figures), and the remaining £583m was from landings made by UK vessels.
- The UK's seafood exports reduced 20% to be worth £1.6bn in 2020. This figure included £208m worth of landings made by UK vessels abroad, which fell 7% in 2020.
- UK consumers purchased £6.8bn worth of seafood in 2020 which was 15% lower than in 2019.
  - Retail sales increased 11% to be worth £4.3bn, 62% of all sales.
    - The three product sectors are reporting growth from Frozen: £1.1bn (+20%), to Ambient: £0.6bn (+12%), then Chilled: £2.5bn (+7%).
  - Sales in commercial out of home outlets declined 39% to be worth £2.6bn.
    - All of the channels in foodservice are reporting a decline in servings: Fish & chip shops: (-27%), Quick service restaurants excl. fish & chips: (-38%), Full service restaurants: (-44%), Pubs: (-51%), Travel & leisure: (-51%), Workplace/college/uni: (-65%)

# UK seafood market supply

**UK seafood supply: £4.8bn (-11%)**

**Total imports:**  
**£3.2bn (-7%)**



**Top 5 species:**

**Tuna:** 10,5634t (-5%)

**Cod:** 97,337t (-8%)

**Salmon:** 91,487t (-10%)

**Haddock:** 46,971t (-9%)

**P&P Shrimps & Prawns:**  
43,129t (+5%)

**Top 5 countries:**

**Iceland:** £277m (-8%)

**China:** £255m (-11%)

**Vietnam:** £251m (+8%)

**Sweden:** £242m (+4%)

**Denmark:** £215m (+12%)

**Foreign vessels landings  
into the UK: £53m (-28%)**



**UK source: £1.5bn (-19%)**



**UK aquaculture:**  
**£962m (-16%)**

**Landings:**

(into the UK by UK vessels)

**£583m (-24%)**



**Top 5 species:**

**Mackerel:** 83,130t (+35%)

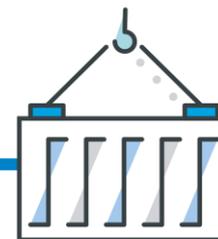
**Herring:** 35,688t (+3%)

**Haddock:** 28,563t (-14%)

**Scallops:** 25,001t (-11%)

**Nephrops:** 23,036t (-32%)

# UK seafood exports



## Exports: £1.6bn (-20%)

### Top 5 species:

**Mackerel:** 70,296t (+13%)

**Herring:** 36,871t (+6%)

**Blue Whiting:** 31,845t (+46%)

**Crabs:** 12,210t (-28%)

**Nephrops:** 10,184t (-28%)

### Top 5 countries:

**France:** £499m (-11%)

**U.S.A.:** £184m (-41%)

**Spain:** £157m (-20%)

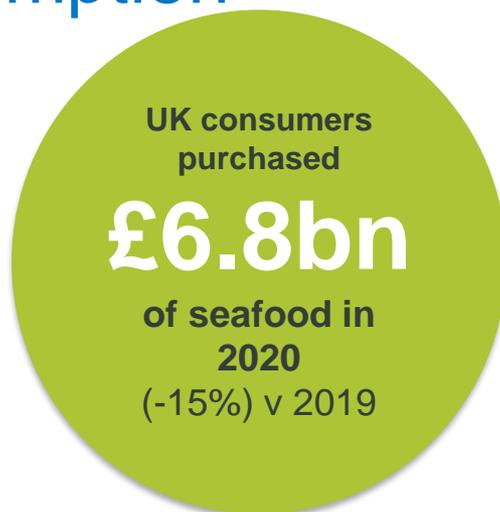
**Irish Republic:** £145m (-13%)

**Netherlands:** £102m (33%)



**Landings abroad by UK vessels: £208m (-7%)**

# UK seafood consumption



## Retail in home: £4.3bn (+11%)

**Chilled:**  
£2.5bn (+7%)

**Frozen:**  
£1.1bn (+20%)

**Ambient:**  
£0.6bn (+12%)



## Commercial out of home: £2.6bn (-39%)



### Share of servings

**Quick service restaurants  
excl. fish & chips:**  
34% (-38%)

**Fish & chip shops:**  
21% (-27%)

**Full service restaurants:**  
16% (-44%)

**Pubs:** 13% (-51%)

**Travel & leisure:**  
11% (-51%)

**Workplace/college/uni:**  
5% (-65%)

Sources: Nielsen ScanTrack UK including discounters MAT 26.12.20, The NPD Group CREST® GB December 2020

(Value based on average spends from 1 person, 1 item occasions filtered by Total Fish/Seafood to simulate the average price paid per servings of fish across Total Out of Home restaurants for meals and snacks.)

# Data context

- No traceability is implied to the country of origin or geographic catch area of the seafood i.e. the named country may be part of a complex distribution chain.
- The values quoted are based on Cost, Insurance and Freight (CIF) delivery terms value for imports to the UK and the Free on Board (FOB) delivery terms value for exports from the UK.
- HMRC volumes quoted are based on the actual product weight of the "goods" themselves without any packaging.
- HMRC data coding excludes “non-food use” commodity codes, and grouping match Seafish Trade Tariff Tool.
- All calculations in this report were performed on the source data which may include many decimal places. For presentation purposes, the data in this report has been rounded at the end to reduce decimal places as far as possible. Therefore, manual calculations may provide slightly different results to those shown; please contact Seafish for the source data if you require further information.
- % figures represent the change against previous year unless stated otherwise.
- Unless stated otherwise: green text = positive change v previous year, red text = negative change v previous year
- CW = Cold Water, P&P = Prepared & Preserved, WW = Warm Water

For further information please read these supporting factsheets

[2020 Q4 Seafish Retail Report](#)

[2020 Q4 Seafish Category Insight Report](#)

[2020 Q4 Seafish COVID-19 Seafood in Foodservice](#)

[2020 Seafish UK Seafood Import and Export Summary Factsheet  
Provisional Data](#)

Further Market Insight reports are available here

<https://www.seafish.org/insight-and-research/market-insight/>

You can also visit our trade tariff tool for further data

[www.seafish.org/trade-and-regulation/international-trade/trade-tariff-tool-in-tableau/](http://www.seafish.org/trade-and-regulation/international-trade/trade-tariff-tool-in-tableau/)

Any questions email [Julia.Brooks@Seafish.co.uk](mailto:Julia.Brooks@Seafish.co.uk)



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