

Seafood Processing Industry Performance: 2023

seafish



Get the latest UK seafood processing industry performance statistics from our 2023 survey.

For more information about underlying data and methodologies please refer to the Processing Methodology Report and Processing Enquiry Tool, which can be found at seafish.org

Information about our processing sector data collection programme and analysis work can also be found at seafish.org

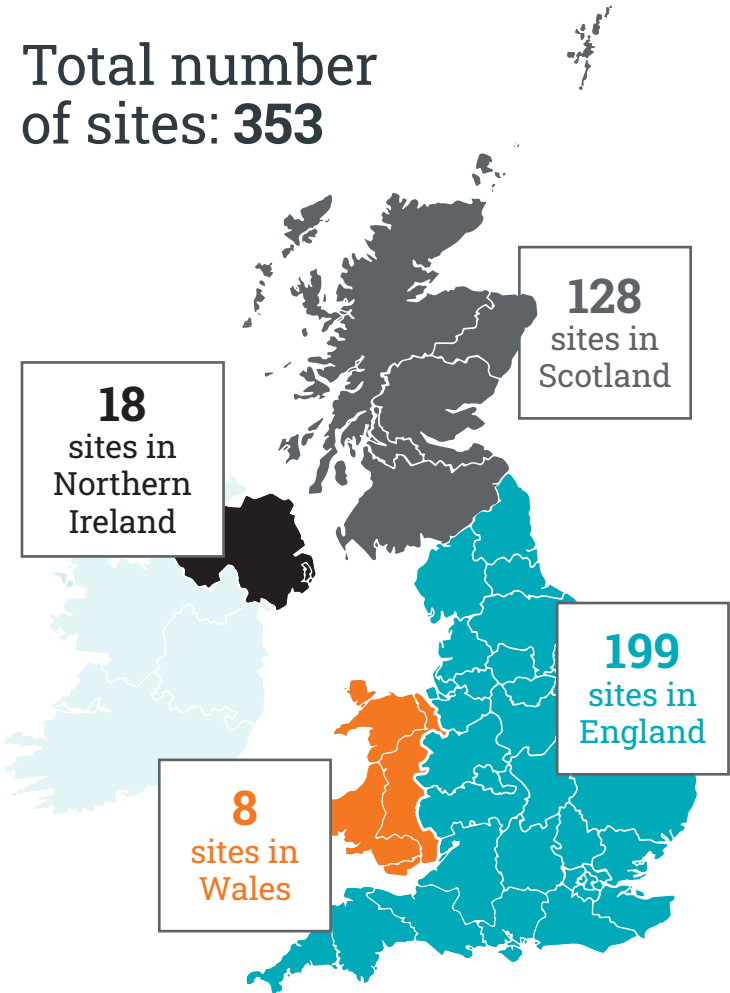
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Industry Profile

In 2023, we identified 353 majority seafood processing sites in the UK employing 18,833 workers. This includes 16,470 full-time employees, 1,403 seasonal employees, and 960 part-time employees. This composition equals 17,246 FTE (full-time equivalent) workers.

Relative to last year's survey, we identified six fewer processing sites and a 4% reduction in FTE employment. Most seafood processing in the UK occurs in England and Scotland, with a smaller number of sites in Northern Ireland and Wales.

Total number of sites: 353



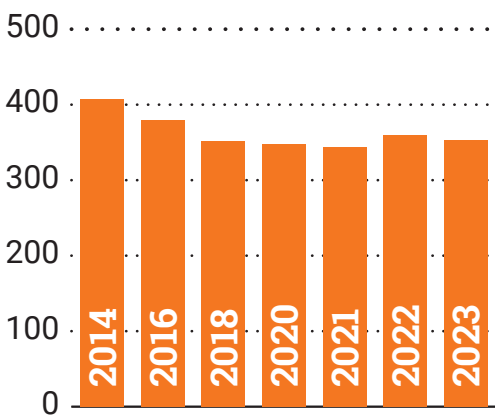
Total employment:
18,833 workers
(= 17,246 FTE jobs)



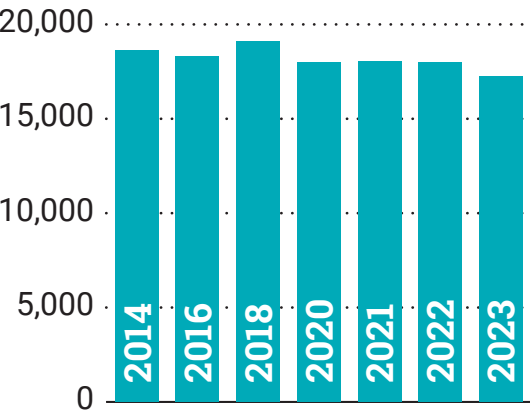
The number of processing sites and FTE jobs supported by the sector has generally condensed over the last decade. The drop in sites over time has largely been driven by a reduction in the number of small and medium sized sites (sites with less than 50 FTEs) in both Scotland and England.

Some sites closed, others grew or merged. Most processors engage in other business activities besides processing, eg. over half of all processing firms are also involved in wholesaling. Some processors are vertically integrated, and are involved in fishing and/or aquaculture.

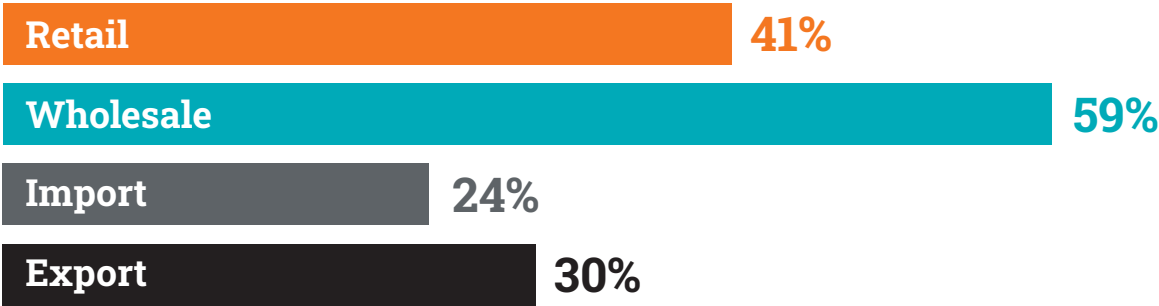
Number of sites



Number of FTE Jobs



Proportion of sites in 2023 that...



All data refers to majority seafood processing sites which are defined as those that derive 50% or more of their annual turnover from seafood processing.

Economic Performance (2021)*



£3.9bn

Turnover

£1.3bn

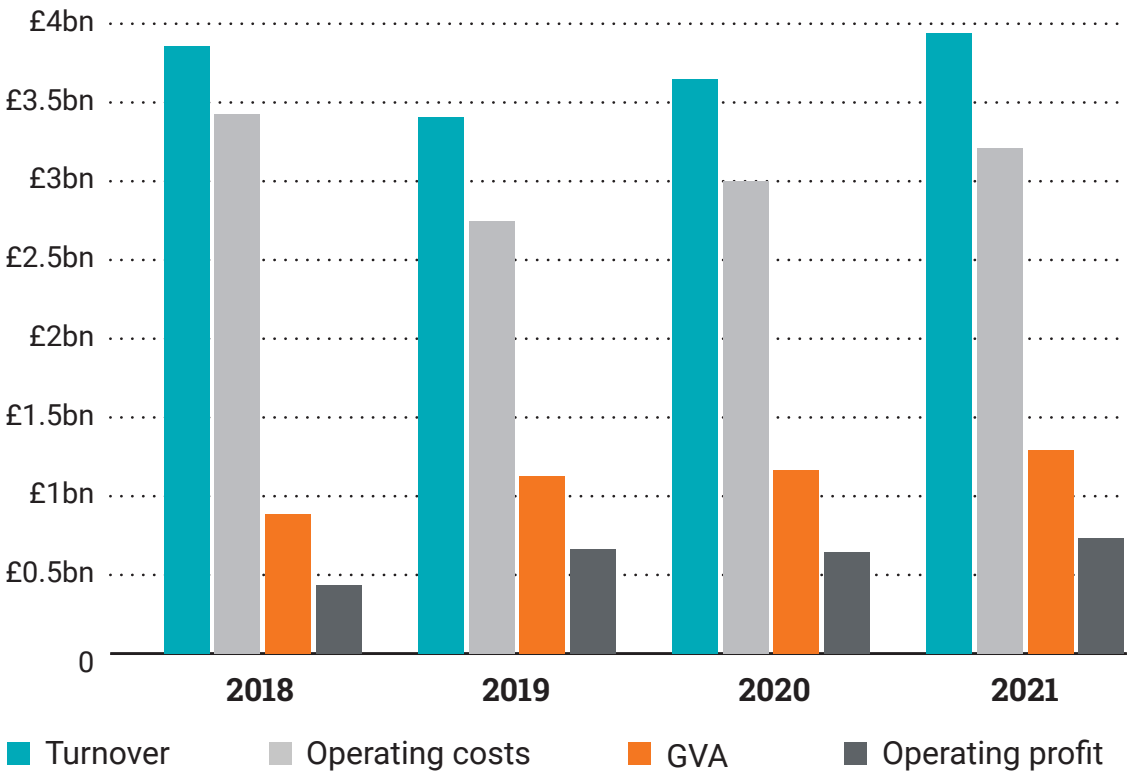
GVA

£731m

Operating Profit

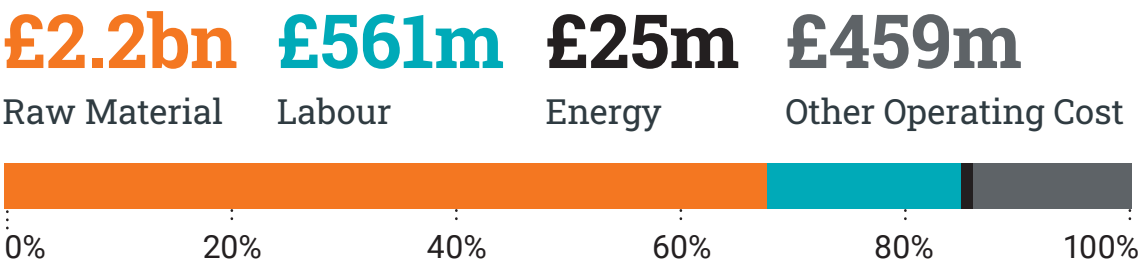
Total turnover in the UK seafood processing sector remained around £4 billion in the last decade. After a drop in 2019, turnover rose in the subsequent two years, suggesting that the overall increase in retail sales

during the Covid-19 pandemic was able to offset losses in foodservice and export markets. This recovery, coupled with a reduction in operating costs has resulted in steady profit margins for processors.



* Financial estimates are two years in arrears. To produce these estimates, Seafish collects financial data from UK majority seafood processors each year. All majority processors are invited to participate and participation is voluntary.

Costs (2021)*



The most substantial cost borne by seafood processors is raw material followed by wages, other operating costs, and energy costs.

Overall, costs to seafood processors increased by 7% over 2020 estimates, with increases in the cost of raw material and labour.

Processing by Firm Size

England

Size Band	No. of sites
FTE 1-10	102
FTE 11-25	35
FTE 26-50	22
FTE 51-100	12
FTE 100+	21
Unreported	7

Scotland

Size Band	No. of sites
FTE 1-10	49
FTE 11-25	23
FTE 26-50	22
FTE 51-100	13
FTE 100+	19
Unreported	2

Northern Ireland

Size Band	No. of sites
FTE 1-10	7
FTE 11-25	4
FTE 26-50	4
FTE 51-100	-
FTE 100+	1
Unreported	2

Wales

Size Band	No. of sites
FTE 1-10	7
FTE 11-25	1
FTE 26-50	-
FTE 51-100	-
FTE 100+	-
Unreported	-

Regional Profiles

East Yorkshire & Northern Lincolnshire (the Humber) and North Eastern Scotland (Grampian) remained key regions for seafood processing in 2023. These regions dominated in terms of both number of sites and FTE jobs supported, despite decreases in both between 2022 and 2023.

Top 10 regions by number of sites

(All % changes are compared to 2022)

Highlands & Islands

47 sites
(7% increase ↑)

Eastern Scotland

17 sites
(19% decrease ↓)

Northern Ireland

18 sites
(6% increase ↑)

Lancashire

12 sites
(8% decrease ↓)

Devon

16 sites
(7% increase ↑)

North Eastern Scotland

48 sites
(2% decrease ↓)

Southern Scotland

11 sites
(8% decrease ↓)

East Yorkshire & Northern Lincolnshire

48 sites
(8% decrease ↓)

East Anglia

16 sites
(33% increase ↑)

Cornwall & Isles of Scilly

21 sites
(no change ↔)

■ Scotland ■ England ■ Wales ■ Northern Ireland

Highlands & Islands and Southern Scotland both saw 6% increases in FTE employees, while Eastern Scotland decreased by 7%. Overall, the number of processing sites and FTE jobs supported by the sector has condensed in recent years.

Top 10 regions by number of FTE jobs

(All % changes are compared to 2022)

Highlands & Islands

1,494 jobs
(6% increase ↑)

Eastern Scotland

920 jobs
(7% decrease ↓)

Northern Ireland

540 jobs
(12% increase ↑)

Gloucestershire, Wiltshire & Bath/Bristol area

462 jobs
(19% decrease ↓)

Devon

618 jobs
(3% increase ↑)

North Eastern Scotland

3,379 jobs
(3% decrease ↓)

Southern Scotland

1,034 jobs
(6% increase ↑)

East Yorkshire & Northern Lincolnshire

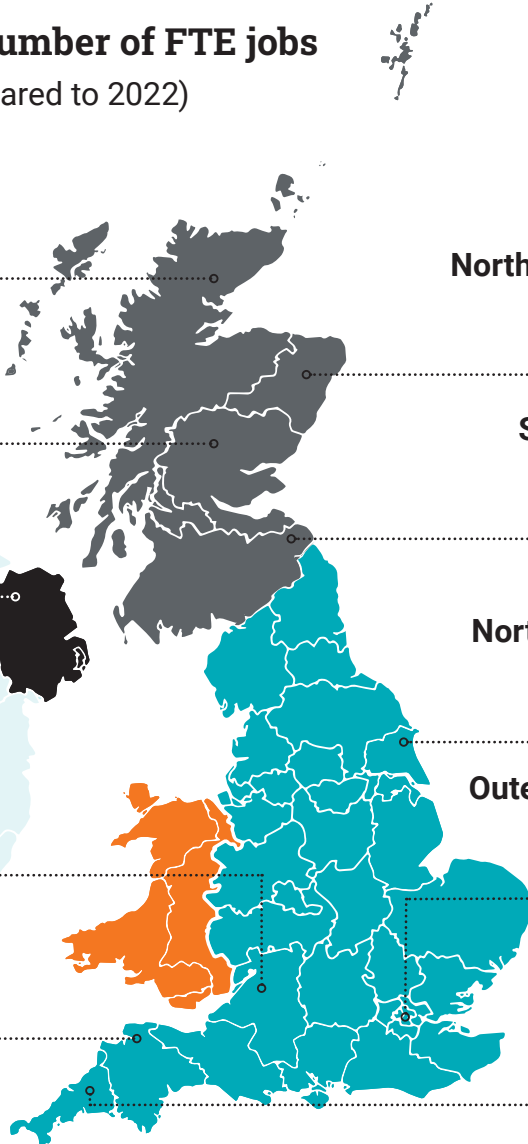
5,348 jobs
(9% decrease ↓)

Outer London – South

405 jobs
(5% decrease ↓)

Cornwall & Isles of Scilly

514 jobs
(1% decrease ↓)

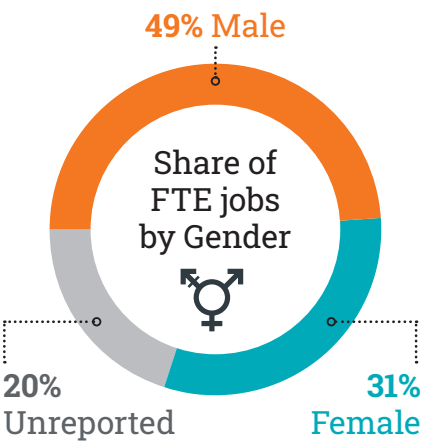


Regions are delineated using Nomenclature of Territorial Units for Statistics (NUTS), a standard for subdividing European countries for statistical purposes.

Demographics of the Processing Industry

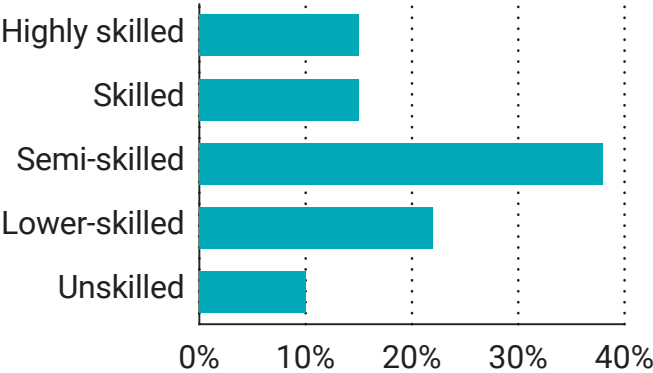
Gender

The seafood processing industry has a higher proportion of male workers versus female workers, albeit with a fairly even split. For the firms that reported number of FTE workers by gender, there were 8,476 male FTE workers and 5,338 female FTE workers. However, the proportion of unreported gender in the sample is quite substantial (20%).



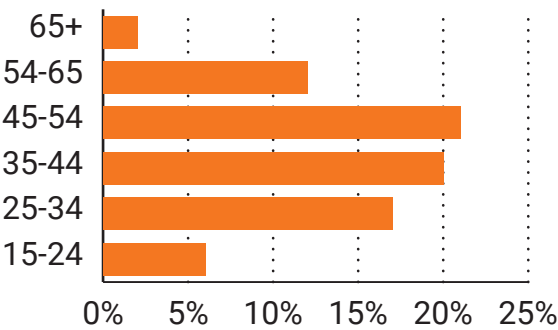
Skill level

In 2023, we asked processors to report the skill level of their full-time employees. The skill level with the most responses was semi-skilled, which accounted for roughly 38% of the sample. This is followed by lower-skilled (22%), highly skilled (15%), skilled (15%), and unskilled (10%).



Age

The age category with the most full-time employees was 45-54. This is followed by 35-44, 25-34, then 54-65. Fewer employees were younger than 24 and older than 65.



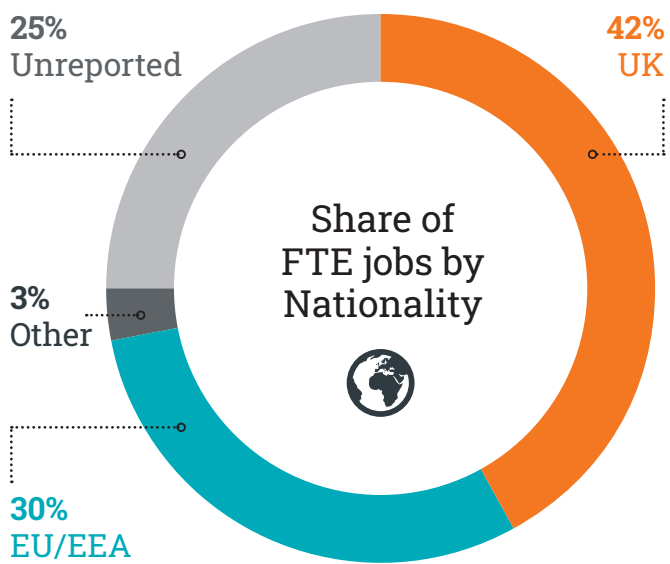
The response rate for demographic questions was low (36% for skill level, 29% for age). As such, figures refer to percentage of the sample, not the total.

Reliance on Foreign Labour in the Processing Industry

Of the total 17,246 FTE workers in the processing industry in 2023, 5,640 FTE workers were non-UK nationals (33%).

This includes 5,187 EU/EEA FTE workers (30%) and 453 non-EU/EEA FTE workers (3%).

The figures refer to percentage of total FTE employment. The response rate for nationality was 75% while 25% is unreported.



In late 2023, amendments to the Skilled Worker Visa route were announced which would increase the minimum salary for a skilled worker from overseas from £26,200 to £38,700.

Despite the already increasing costs of labour in the sector, this salary is significantly higher than the salaries paid in most seafood processing firms. As processors have already raised concerns about a shortage of locally available workers, these new amendments could cause further labour shortages.

Who is this likely to impact the most?

Scotland is the nation most reliant on foreign labour, with non-UK workers accounting for 40% (FTE) of the workforce. This is followed by England (28%).

North Eastern Scotland is the region most reliant on non-UK workers. Southwest England, Southern England, and the Midlands also have a significant amount of non-UK workers (49%).

Larger processors are more reliant on foreign workers: processing firms with over 100 FTE workers reported an average of 36% of non-UK workers.

Species type

Mixed

FTE Jobs	10,643
Number of sites	152

In 2023, 62% of seafood processing FTE jobs in the UK were at sites processing a mixture of species. Sites in East Yorkshire and Northern Lincolnshire (the Humber) region supported 46% of all FTE jobs at mixed processing sites in 2023, following by sites in North Eastern Scotland (Grampian) (20%).

Salmon/Trout

FTE Jobs	1,108
Number of sites	28

The largest proportion (52%) of all FTE jobs at salmon processing sites in 2023 was at sites in the Highlands and Islands region, followed by West Central Scotland (19%) and Eastern Scotland (14%).

Demersal

FTE Jobs	1,008
Number of sites	50

In 2023, most demersal processing sites (72%) supported 25 or fewer FTE jobs. Both North Eastern Scotland (Grampian) and East Yorkshire and Northern Lincolnshire (the Humber) were clear regional hubs for demersal processing, with these two regions accounting for 65% of the FTE jobs supported by demersal sites.

Pelagic

FTE Jobs	889
Number of sites	14

In 2023, 52% of FTE jobs at pelagic processing sites were in the North Eastern Scotland (Grampian) region followed by 32% in Devon in Southwest England. Pelagic processing sites were evenly spread across site sizes.

Shellfish

FTE Jobs	3,207
Number of sites	89

In 2023, the majority of shellfish processing sites (66%) supported 25 or fewer FTE jobs. Most of these jobs were in England (52%) and Scotland (36%). In England, these sites were smaller on average (average 33 FTEs/site) than in Scotland (average 52 FTEs/site).

Other/Unknown

FTE Jobs	391
Number of sites	20

Processing type

In 2023, 72% of primary processing sites employed 25 or fewer FTEs. Together these smaller sites supported 26% of FTE jobs at primary processing sites in the UK, most of which were located in North Eastern Scotland (Grampian), East Yorkshire and Northern Lincolnshire (the Humber) and Highlands and Islands.

Nine secondary processing sites employed over 100 FTEs in 2023. Together these nine sites supported 84% of the FTE jobs at secondary processing sites in the UK. Five were located in England and four were located in Scotland.

While over 46% of mixed processing sites employed fewer than 10 FTEs in 2023, 84% of FTE jobs at mixed processing sites were supported by sites with over 100 FTEs. Most of these large mixed processing sites were located in East Yorkshire and Northern Lincolnshire (the Humber) and North Eastern Scotland (Grampian).

Primary

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



FTE Jobs	2,418
Number of sites	100

Secondary

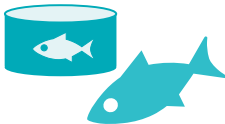
Includes: brining, smoking, cooking, freezing, canning, breasting, vacuum and controlled packaging, drying, production of ready meals.



FTE Jobs	3,909
Number of sites	54

Mixed

A mix of primary and secondary processing.



FTE Jobs	9,856
Number of sites	169

Unknown

FTE Jobs	1,063
Number of sites	30

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