SEAFISH

the authority on seafood

2012 Survey of the UK Seafood Processing Industry

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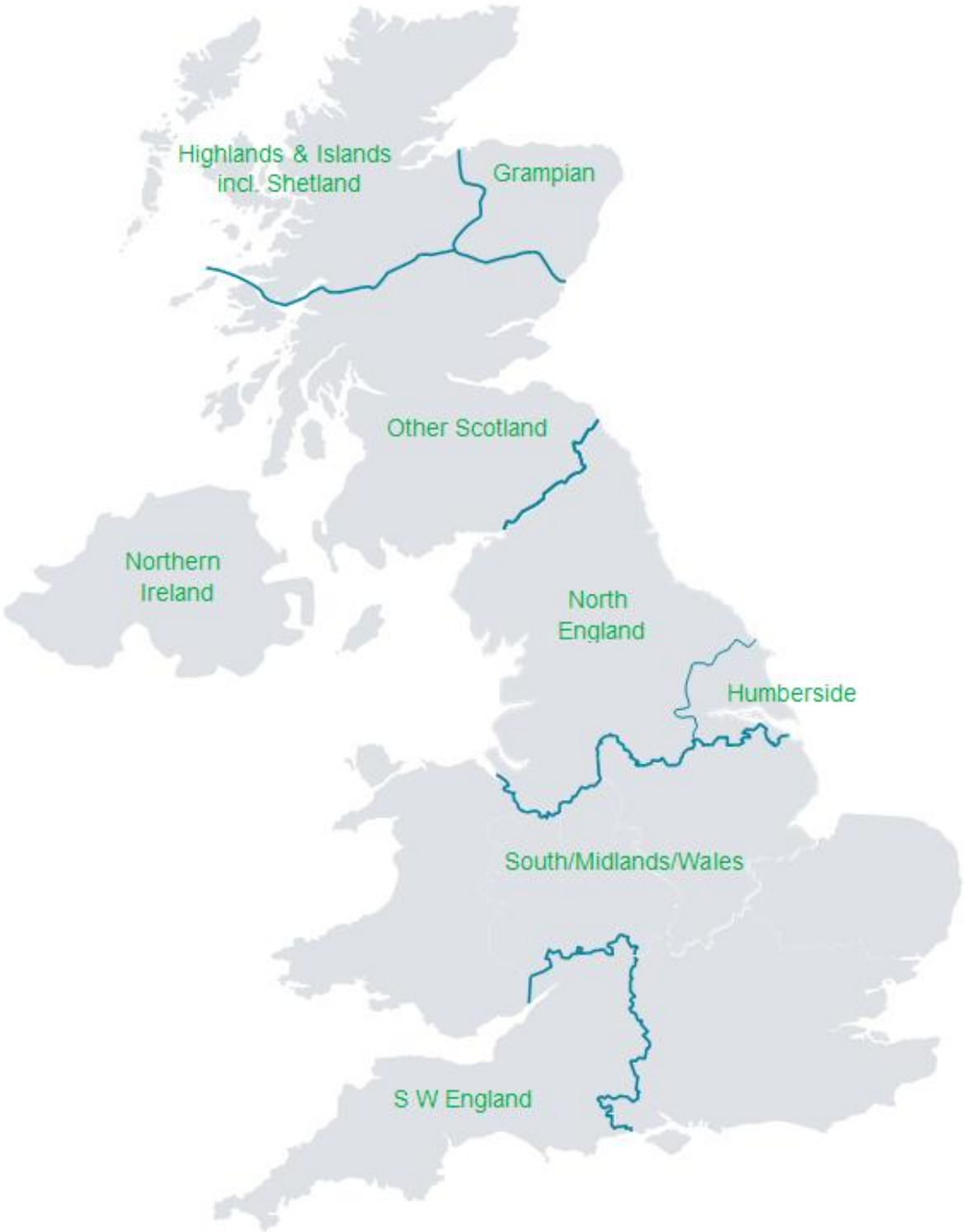
Executive Summary

This report is based on a census of the UK seafood processing industry carried out by Seafish between March and August 2012.

Key features of the industry in 2012, compared to 2010:

- There are 325 UK sea fish processing units – a drop of 15% since 2010.
- Total employment figures are 11,864 FTE – a 17% drop since 2010.
- Average FTE jobs per processing unit remains at 37.
- Decrease of 25% in number of primary processing units.
- Secondary-only processing units have on average of 89 FTE jobs per unit and make up 14% of all sea fish processing units.
- There are 15 sites less than 5 years old, 65% fewer than in 2010.
- Humberside has 21% fewer units and 25% fewer FTE jobs than in 2010.
- In Grampian, total FTE jobs have increased by 11% since 2010.
- Salmon processing units are steady with 54 in 2010 and 53 in 2012.
- There are 3,465 FTE jobs in salmon processing, a drop of 18% since 2010.

Regions of the UK for reporting processing units and jobs



Introduction

This new census survey of the UK seafood processing industry was carried out by Seafish Economics in 2012.

Seafish is often asked by government and the industry for updated information on the UK seafood processing sector. This report provides an update on the information collected for the last survey in 2010.

Similar reports were published in 1986, 1995, 2000, 2004 and 2008, and the series can be used to identify and analyse trends. Findings for salmon processors are included separately (Section 4) to remove doubt about double counting of jobs in firms which process both salmon and sea fish.

Scope

The scope of the survey included UK (not Channel Islands or Isle of Man) sea fish and salmon processing businesses, of all sizes, engaged in any type of processing, where 50% or more of 2012 turnover is generated by sale of the products of fish processing.

Definitions

The following definitions have been used throughout the survey. These are consistent with previous census surveys. These definitions are for the purpose of the Seafish census survey only.

Site – Individual factory or facility for processing seafood.

Unit – Same as site.

Company – Organisation that owns at least one processing site, some companies own more than one.

FTE – Full Time Equivalent job.

Turnover – Sales (£) from business activity.

Sea fish – All marine fish including shellfish, excludes salmon and trout.

Processing

Processing is materially changing the seafood. This definition excludes seafood merchants that buy and sell seafood (see Trading/Wholesaling), possibly including defrosting, repackaging and selling in smaller quantities but not actually coating, cutting or altering the seafood. This also excludes fishmongers which cut and filet seafood solely for sale in their own premises (see Retailing). Service companies, which provide a processing service to other companies without owning the seafood are included, as they materially change the seafood.

Trading/Wholesaling - Buying and selling fish (trade customers).

Retailing - Selling fish to members of the public.

Importing – Purchasing fish from companies based in countries outside the United Kingdom.

Exporting - Selling fish to buyers in countries outside the United Kingdom.

Demersal / Whitefish
Cod, haddock, plaice, whiting, pollack, saithe (coley), hake, monk/anglerfish, soles, lemons, megrim, witches, brill, turbot, halibut, dogfish, sharks, skates, rays, john dory, bass, ling, catfish, redfish.

Shellfish
Nephrops, (scampi, langoustines), scallops, crabs, oysters, cockles, mussels, winkles, lobster, crawfish, shrimps, squid, cuttle-fish, octopus.

Pelagic - Herring, mackerel, pilchard, sprat, whitebait, tuna.

Exotic
Tilapia, croakers, drums, emperor/emperor breams, groupers, jacks, parrotfish, pomfret, snappers, swordfish.

Primary processing
Primary processes include: cutting, filleting, picking, peeling, washing, chilling, packing, heading and gutting.

Secondary processing
Secondary processes include: brining, smoking, cooking, freezing, canning, deboning, breading, battering, vacuum and controlled packaging, production of ready meals.

Mixed processors*
Processing units that carry out a mix of primary and secondary processes are classed as “mixed” processors.

*It is important to remember these strict definitions when considering the figures presented in this report, since there is often a general idea that a primary processor is a smaller firm filleting fresh fish and a secondary processor is a large firm producing ready packaged seafood products. For the purpose of this survey, large units which carry out primary processes to provide material for their finished products are classed as Mixed (i.e. units are defined by type of activity rather than by format of their output).

1. Processing units and employment

1. Processing units and employment

1.1 Industry overview

Since 2012, the number of UK sea fish processing units has continued to fall, albeit at a slower rate than between 2008 and 2010 (see Table 1.1). The number of sea fish processing units now stands at 325, a decrease of 15% on the 384 units recorded in 2010. Employment in the industry has also reduced since 2010. There are now 11,864 Full-Time Equivalent (FTE) jobs recorded, a 17% reduction compared to 2010. This still gives an average FTE per unit of 37, the same as in 2010. However, in 2010 there were only 2% fewer FTE jobs than in 2008.

UK sea fish processing industry population: FTEs and processing units					
Sea fish processors	2000	2004	2008	2010	2012
No. of UK FTE jobs	22,256	18,180	14,660	14,331	11,864
No. of processing units	541	573	479	384	325
Average FTEs per unit	41	32	31	37	37

Table 1.1 UK sea fish processing industry population: FTEs and units

Included in the 325 processing units were 46 additional sites not included in 2010 with a total of 1,697 additional FTE jobs. Of these 46 sites, only seven are completely new to our database, and only one of the seven is a new company since 2010. The remaining 39 of the 46 have been in our database in previous years, some of these were categorised as processors previously but not in 2010. Some companies' mix of activities varies from year to year which is why an individual company might be classed as a sea fish processor one year but may not fit the criteria in another year.

There are 105 sites which were identified as processors in 2010 but which are not included in 2012. The total number of FTE jobs at these sites in 2010 was 4,385 so this accounts for the large drop in FTEs in this census. Figure 1.1 shows the breakdown of what has happened to these sites since 2010. 36% of the 105 sites are no longer operating. 9% were categorised as processing sea fish in 2010 but now process more salmon than sea fish, and are therefore included in the analysis on salmon processing. Sites in the other two categories have changed the nature of their business and no longer meet our criteria as defined in the introduction.

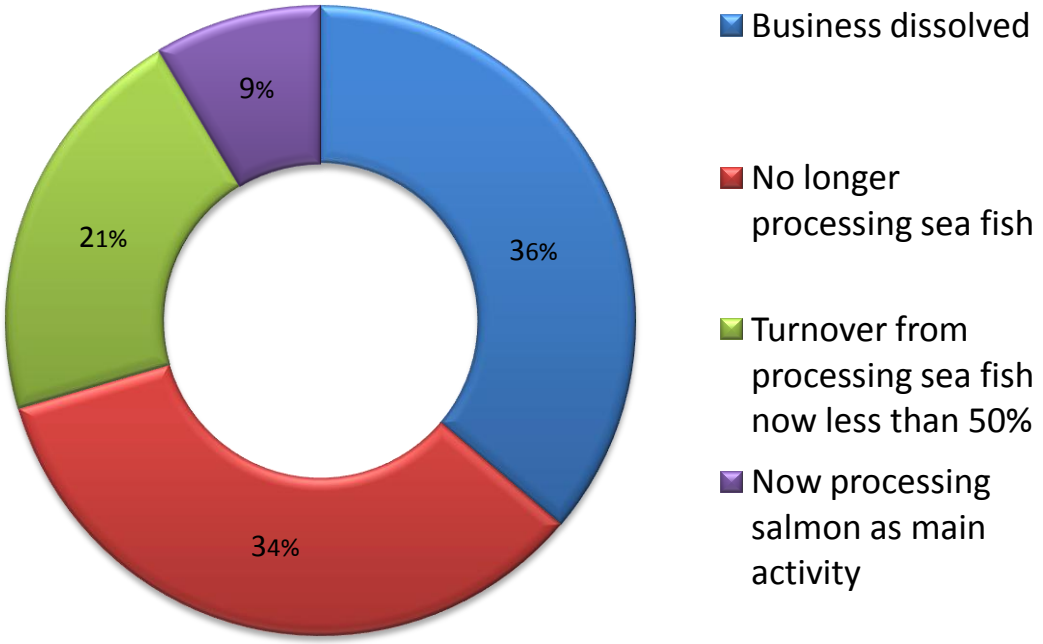


Figure 1.1 Processing sites included in 2010 not included in 2012

1.2 Industry characteristics

The industry continues to include a small number of large multi-unit businesses, and a larger number of small, single unit businesses although the difference in numbers is much less than in 2004 (see figure 1.2).

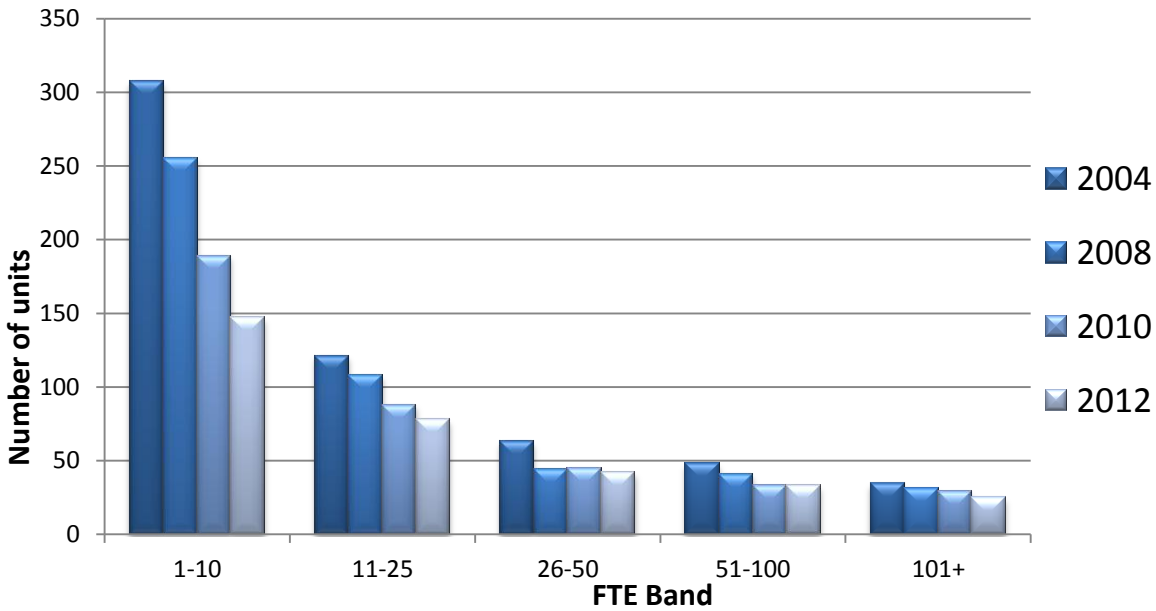


Figure 1.2 Number of processing units by size (FTE band)

The most marked decline in numbers of processing units since 2010 has been amongst the smallest units, i.e. those employing between 1 and 10 FTEs. From 2010 to 2012 there was a 22% reduction in units of this size and a reduction of 53% since 2004. The 11-25 FTE band saw a 12% reduction over the last two years. The remaining three size categories have remained stable in numbers.

This would suggest that smaller companies are currently finding it more difficult to succeed than larger companies, which appear to be more sustainable.

The share of employment across all company size categories has remained fairly stable, see figure 1.3. Smaller units (1-10 FTE band) account for only 6% of industry employment, whilst representing 45% of total processing units. In contrast, the largest units (101+ FTEs) provide nearly 50% of employment from only 7% of all business units.

The biggest changes in share of employment come in the two largest FTE bands: an increase in share of employment from 16% to 21% in the 51-100 FTE band and a decrease in the 101+ FTE band from 55% to 49%. However, this has merely reversed the 2010 position for both and returned to similar levels shown for 2004 and 2008.

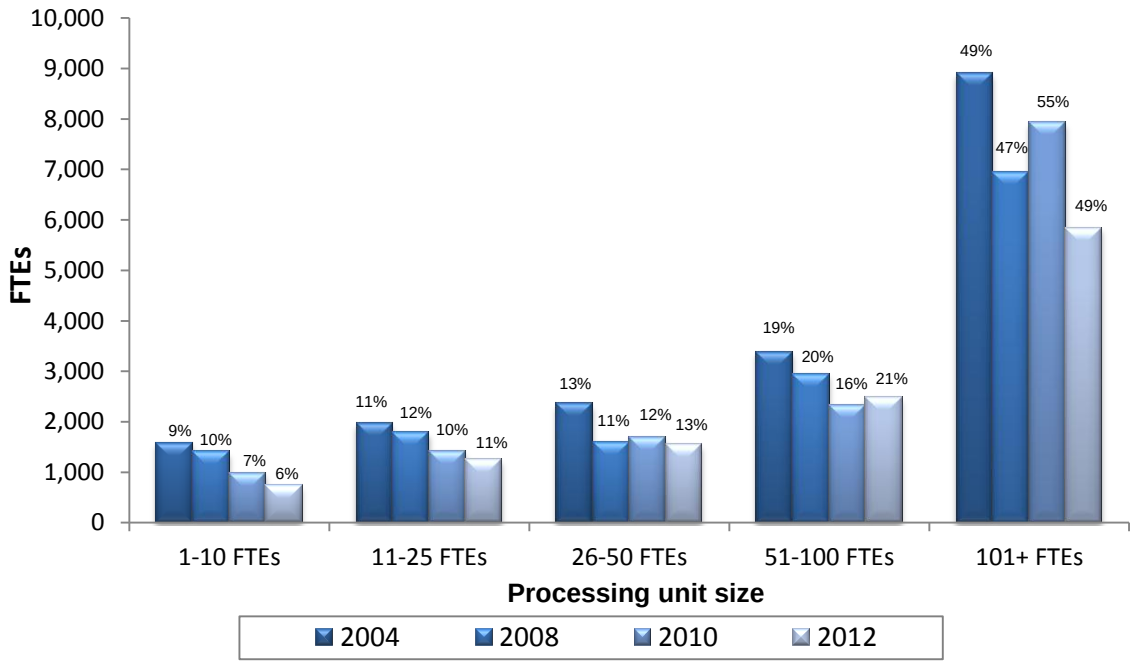


Figure 1.3 Industry employment by processing unit size

1.3 Structure by species processed

There has been very little change in the overall share of employment in processing different species groups. Units processing mixed species (mix of white / shell / pelagic) continue to account for the majority of processing at 52% while units processing only pelagic species are again in the minority of processing units at 8% (see figure 1.4).

Although mixed species processing still accounts for the majority of processing units, the overall share of FTE jobs fell from 59% in 2010 to 52% in 2012. Share of employment has increased slightly for all other species groups.

In order to better define the species a new category of 'exotic fish' was added to the questionnaire this year. 34 units were flagged as processing exotic fish although none of these units were found to be exclusively processing this group and were therefore classed as 'mixed'.

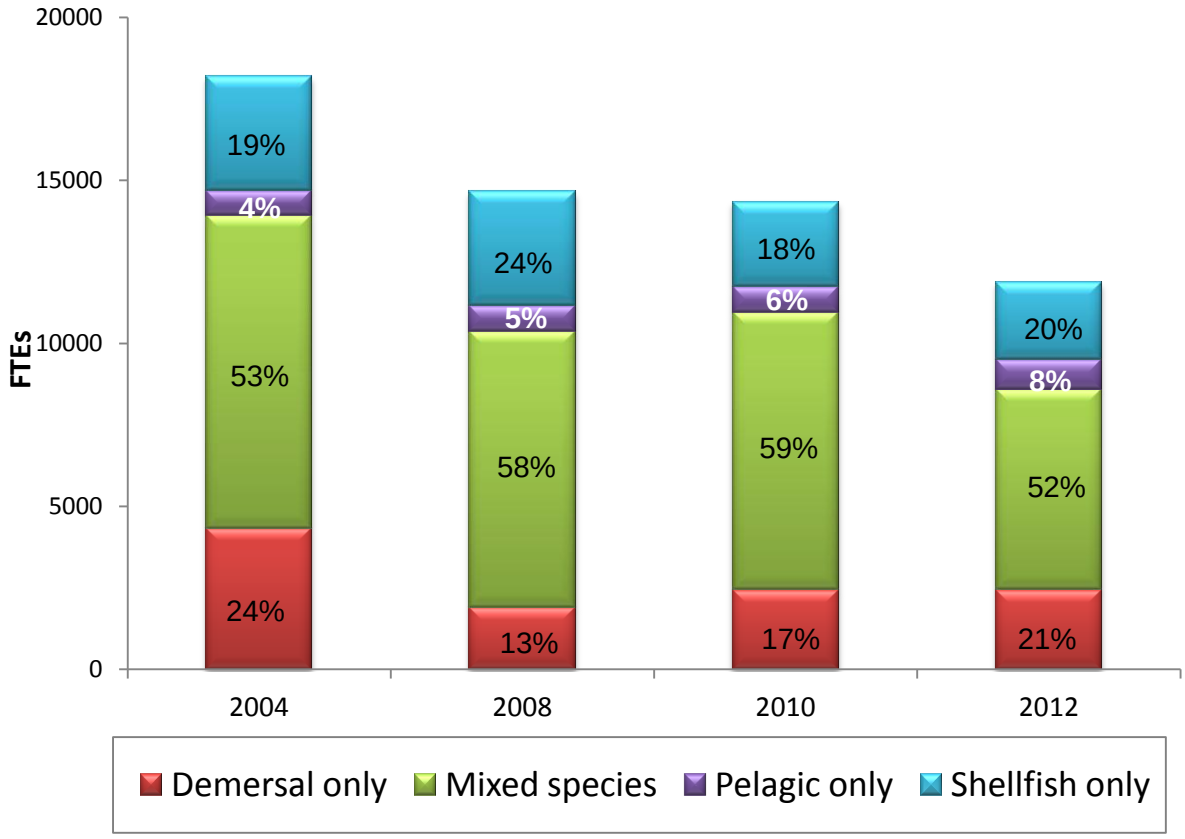


Figure 1.4 Industry employment by species processed

1.4 Structure by process type

Primary and mixed processing units continue to be the most prevalent type with only 14% of units undertaking secondary-only processing. Processing units carrying out a mix of primary and secondary processes account for 49% of units and primary-only processing units now account for 37% of units compared to 41% in 2010.

Primary processing has seen the sharpest decline in terms of number of units. At 119 units there are 25% fewer units operating in 2012 compared to 2010. The smallest decline was in the mixed processing category with 159 units, a 7% decline since 2010. Secondary-only units fell in number by 15% to 47 units in 2012.

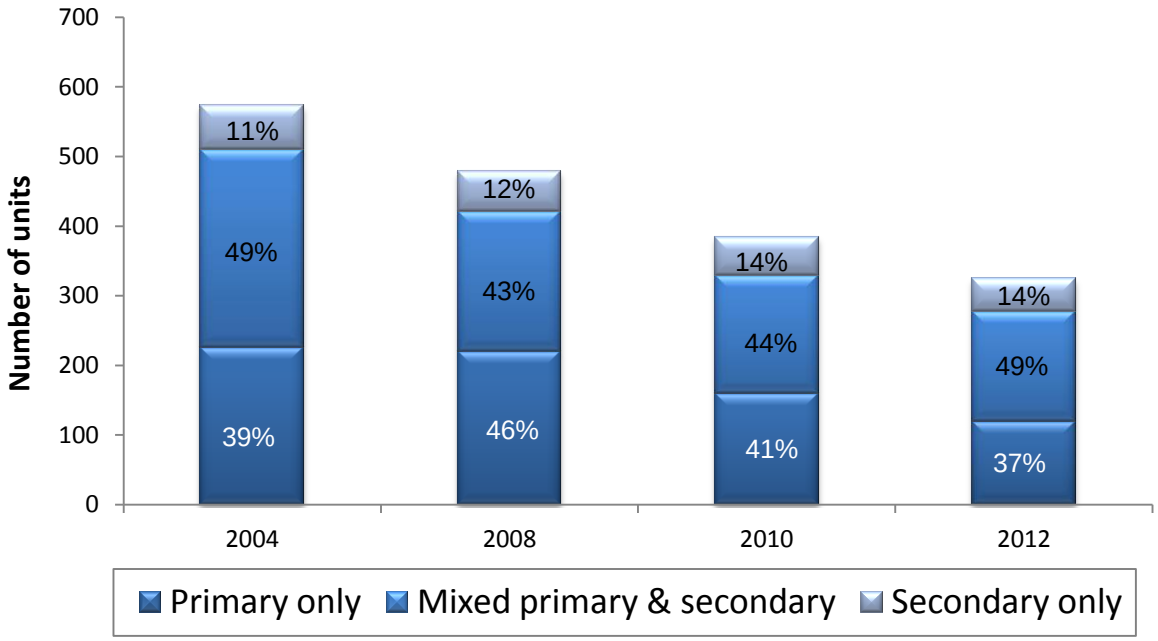


Figure 1.5 Proportion of sea fish processing units by process type

Although secondary-only processing units make up only 14% of the total number of units, they provide 35% of the share of FTE jobs. This equates to an average of 89 FTE jobs per unit, compared to 38 per unit in mixed processing and 13 FTE jobs per unit in primary processing. This shows that secondary processing is generally undertaken at larger units, primary processing units continue to be, on average, much smaller and mixed units fall in between.

The sharpest decline in FTE jobs can be seen with primary processing at 39% less FTE jobs than 2010. The decline in FTE jobs for mixed and secondary processing were both just over 12% for the same period.

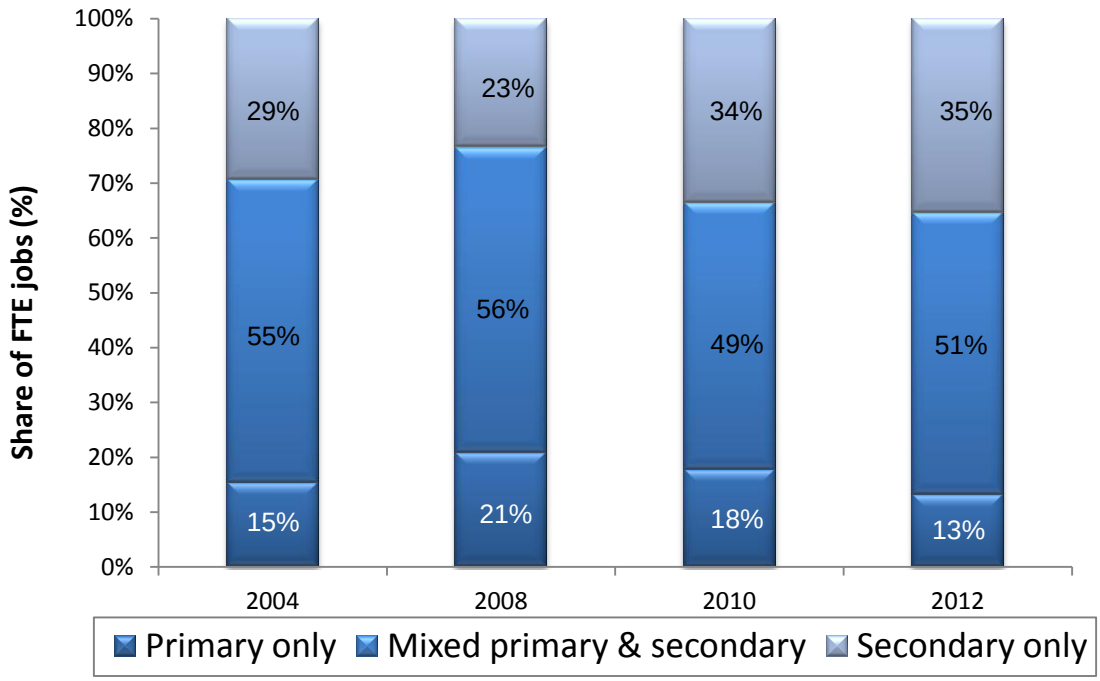


Figure 1.6 Proportion of industry employment by process type

2. Age of processing units

2. Age of processing units

The business age category with the largest number of units and FTE jobs is again the 26-50 years category with 111 units and 4,517 FTEs. This represents a 34% and 38% share of total units and FTEs respectively. As could be expected in a mature industry, the age band with the smallest number of units is 0-5 years with 15 units, accounting for 239 FTE jobs. This is in marked contrast to 2010 where 42 processing units fell into this category, a drop of nearly 65%.

After 0-5 years, the age band with the biggest drop in FTE jobs in 2012 is 6-10 years. Since 2010, the number of processing sites in this age group has decreased by just under 10%, from 48 to 44, but the number of FTE jobs has dropped more significantly, by over 45% from 2,618 to 1,427.

The figures suggest that there have been far fewer start up companies in recent times and that more job losses have occurred in some of the younger companies.

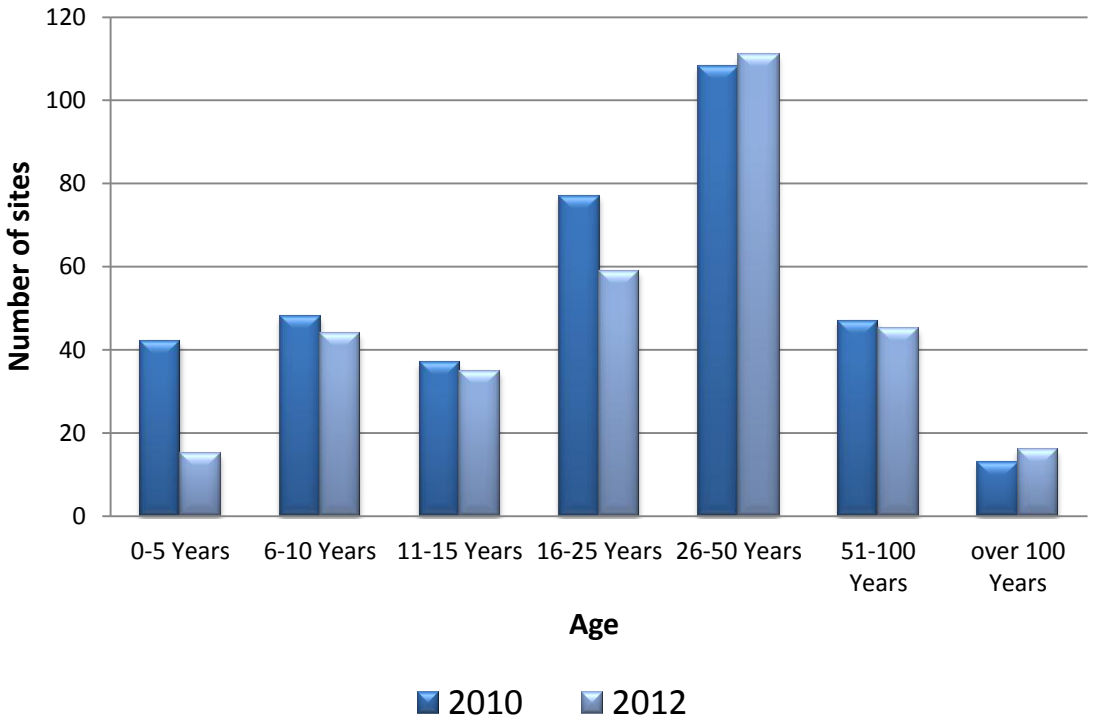


Figure 1.7 Age of processing units

3. Geographical distribution

3. Geographical distribution

Humberside and Grampian continue to have the largest concentrations of sea fish processing units across the UK. The lowest levels of processing activity are in Northern Ireland and the Highlands and Islands of Scotland.

Humberside continues to have the largest number of processing units but has fallen behind Grampian in terms of the number of FTE jobs. Humberside FTE jobs have fallen by 25% since 2010 and the number of units has decreased by 21%. However, Humberside activity reveals again that primary processing accounts for the majority share of processing units at 56%, even though the overall number of primary processing units has fallen by 29% since 2010. The number of primary processing units in Grampian has fallen to such an extent that mixed processing units now hold the majority. There has also been growth, albeit minor, in the number of mixed and secondary units in Grampian but overall units in this region are down 13% on 2010 numbers.

Mixed processing units accounts for the largest concentration of activity in all regions with the exception of Humberside as mentioned above. Although there has been a drop of 15% in overall number of units since 2010, the drop in number of mixed processing units is just 6%.

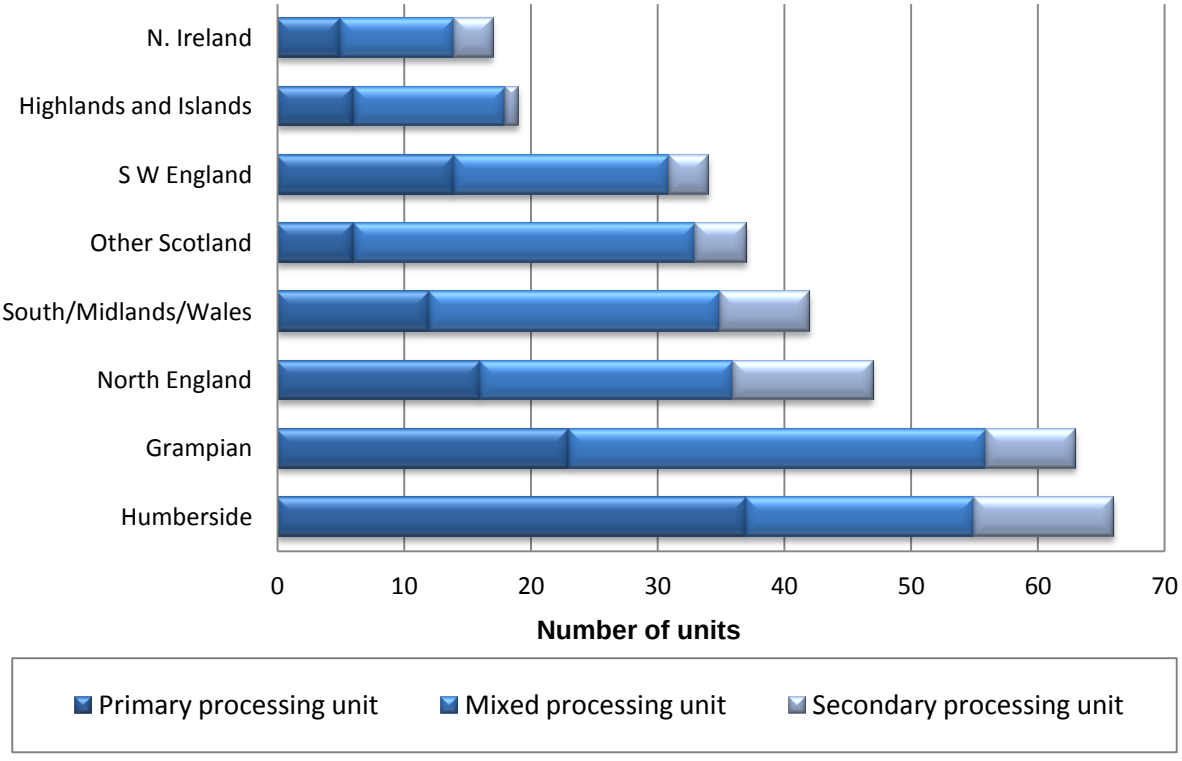


Figure 1.8 Number of sea fish processing units by region and processing type

The geographical distribution of sea fish processing employment also reflects the dominance of processing activity in the Humberside and Grampian areas and much smaller scale processing activity in more rural outlying areas such as Northern Ireland and the Highlands and Islands of Scotland.

Secondary processing in Humberside and Grampian alone accounts for 80% of all secondary FTE jobs. In Humberside there are 2,008 FTE jobs from 11 units giving an average of 182 FTEs per unit. In Grampian there are 192 FTEs per unit on average with 1,349 FTE jobs from 7 sites. The most marked regional change in FTE jobs can be seen in the Humberside figures. Mixed processing FTE jobs in Humberside this year has been recorded as 705, which is a 71% decrease on 2010 but secondary processing FTEs has increased by 69% from 1,186 to 2,008.

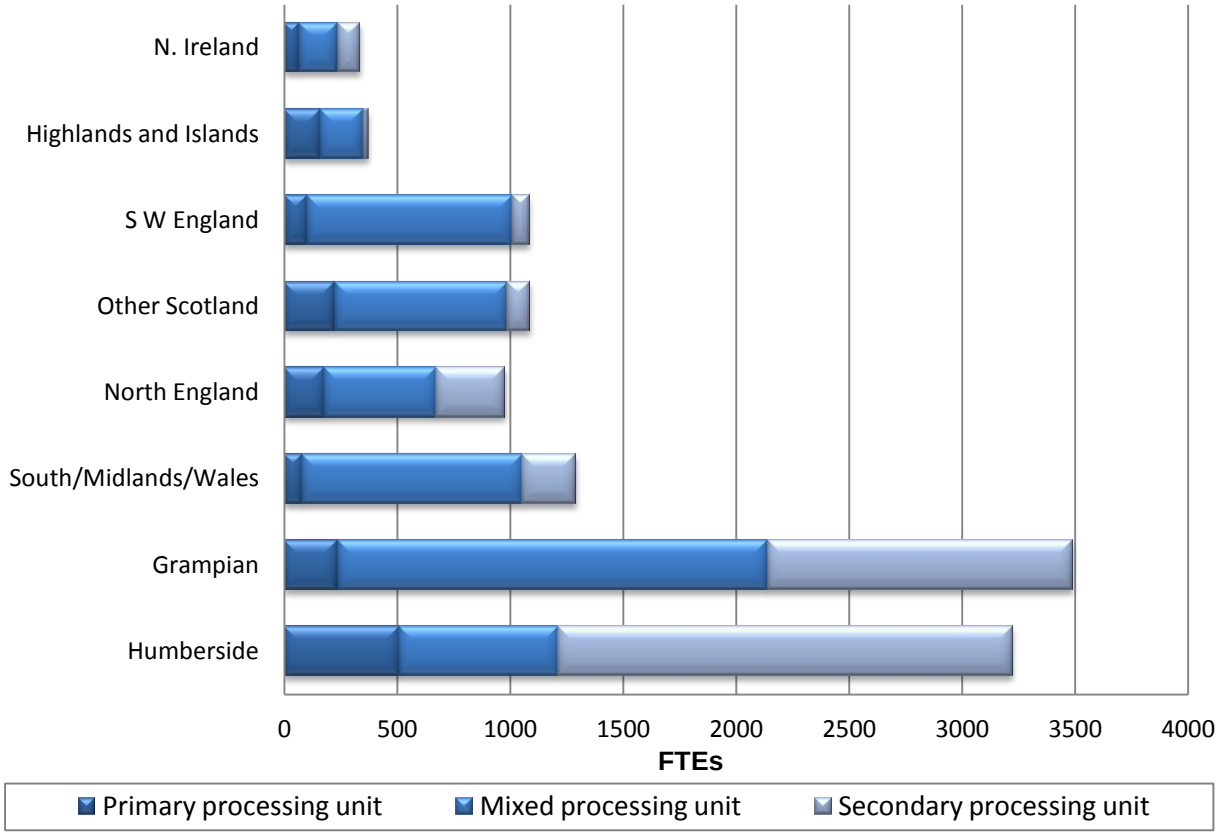


Figure 1.9 Industry employment by region and processing type

4. Salmon industry structure

4. Salmon industry structure

4.1 Processing units and employment

The number of salmon processing units in the UK has been stable since 2010, after a sharp decline between 2008 and 2010 (see table 1.2). However, the number of FTE jobs has decreased by nearly 18% which has reduced the average FTEs per unit from 78 to 65.

Owing to the large concentration of salmon processing units in Scotland (73% of all UK units in 2012 and 82% of UK FTE jobs), the figures for Scotland have been included separately in table 1.2. There has been a 10% decrease in number of units in Scotland and a 23% decrease in number of FTE jobs in Scotland compared to 2010. However the average FTE jobs per unit in Scotland continues to exceed the UK average at 73.

UK salmon processing industry population: FTEs and processing units						
Region	Scotland			UK		
Year	2008	2010	2012	2008	2010	2012
No. of FTE jobs	4,073	3,737	2,859	5,223	4,223	3,465
No. of processing units	48	43	39	71	54	53
Average FTEs per unit	85	87	73	74	78	65

Table 1.2 UK salmon industry population: FTEs and units

There are nine additional sites categorised as salmon processors in the UK in 2012, which were included in the sea fish processing figures in 2010. There has been seven new salmon units included in 2012, two of which are new sites, the remainder were on our database previously but not categorised as a salmon processor in 2010. This means there are 17 sites that were in the 2010 population but are not included in the 2012 figures. Of these 17 sites, nine companies are no longer trading, five are now categorised as sea fish processors and three reported that salmon processing no longer accounts for at least 50% of their annual turnover.

4.2 Salmon industry process types

From 2008 to 2010 there was a sharp decrease in the number of primary processing units, a smaller decrease in the number of mixed units and a small increase in secondary units. 2012 sees a sharp increase of nearly 43% in primary processing units, a small increase of 3% in mixed processing units and a fall of nearly 30% in secondary units.

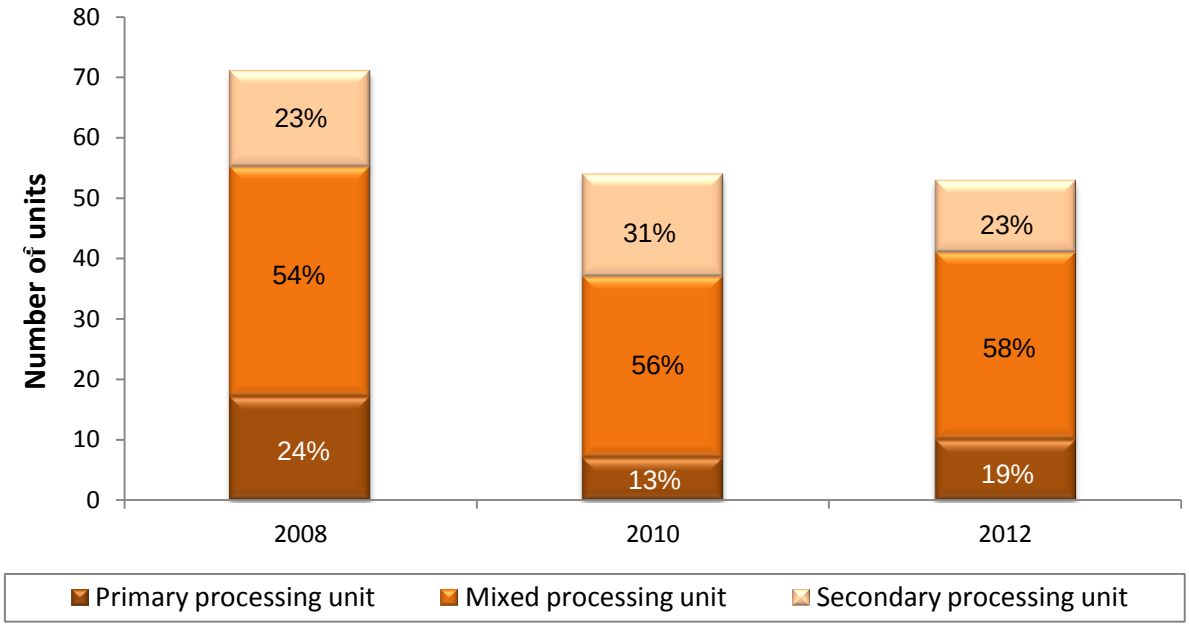


Figure 1.10 Salmon processing units by process type

Mixed primary and secondary processing units continue to dominate the share of employment with 80% of FTE jobs coming from mixed processing units. The share of employment from primary-only and secondary-only processing units follows the same pattern as the number of units.

Primary-only processing units were the only category to experience a growth in FTE jobs with 73 additional jobs since 2010, representing an 18% increase. Secondary processing units experienced a 58% drop in FTE jobs and although there was one more mixed processing unit in 2012 than 2010, there was a 16% drop in FTEs. On average, mixed processing units employ 89 FTEs, primary processing units employ 48 FTEs and secondary processing units employ 17 FTEs.

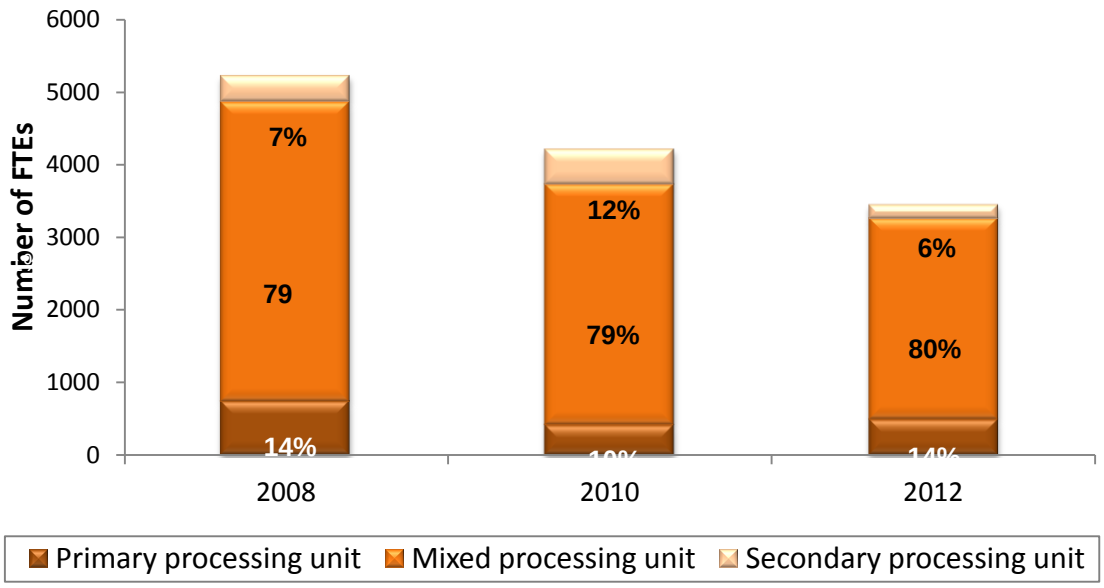


Figure 1.11 Salmon industry employment by process type

4.3 Geographical distribution

Scotland continues to dominate salmon processing activity in the UK and is home to 73% of units. Figure 1.12 illustrates that the top 3 regions in the UK are made up from Scotland, with the Highlands and Islands and Other Scotland making up 64% of processing units alone. Other areas of the UK show much more modest levels of salmon processing activity, accounting for 33% of the primary processing units, 29% of mixed units and 8% of secondary units.

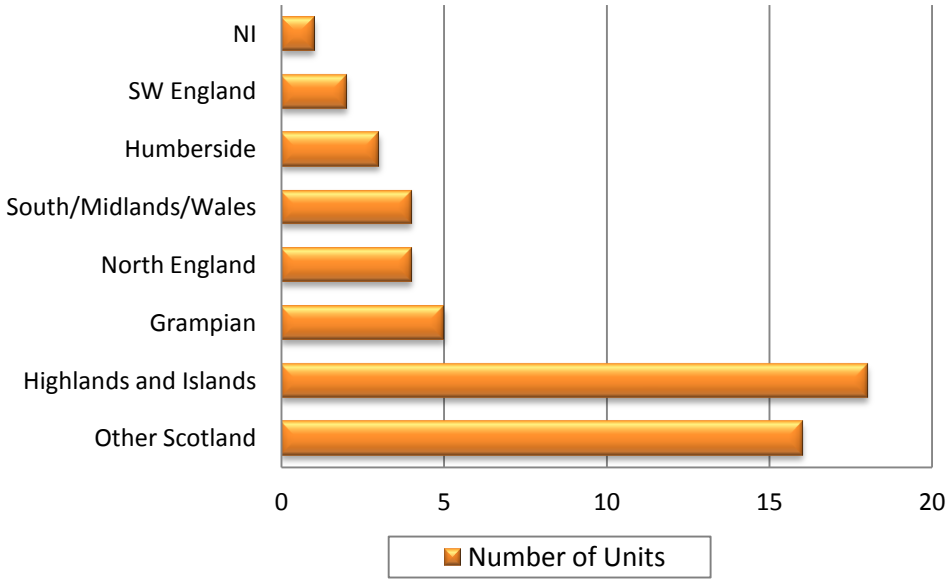


Figure 1.12 Distribution of UK salmon processing units by region

The geographical profile of salmon processing employment also reveals the dominance of Scotland in the salmon processing industry, with 82% of salmon FTE jobs located in Scotland.

Of all salmon FTE jobs across the UK, mixed processing units account for 80%, primary-only processing units account for 14% and 6% of all salmon FTE jobs are in secondary-only processing units. The Highlands and Islands and Other Scotland again dominate with 78% of all FTE jobs in the UK with a share of 88% of primary processing employment, 75% of mixed and 96% of secondary FTEs between them. Outside of Scotland the highest concentration of employment is in North England and South, Midlands and Wales, with 83% of all non-Scotland FTE jobs, mainly in mixed processing.

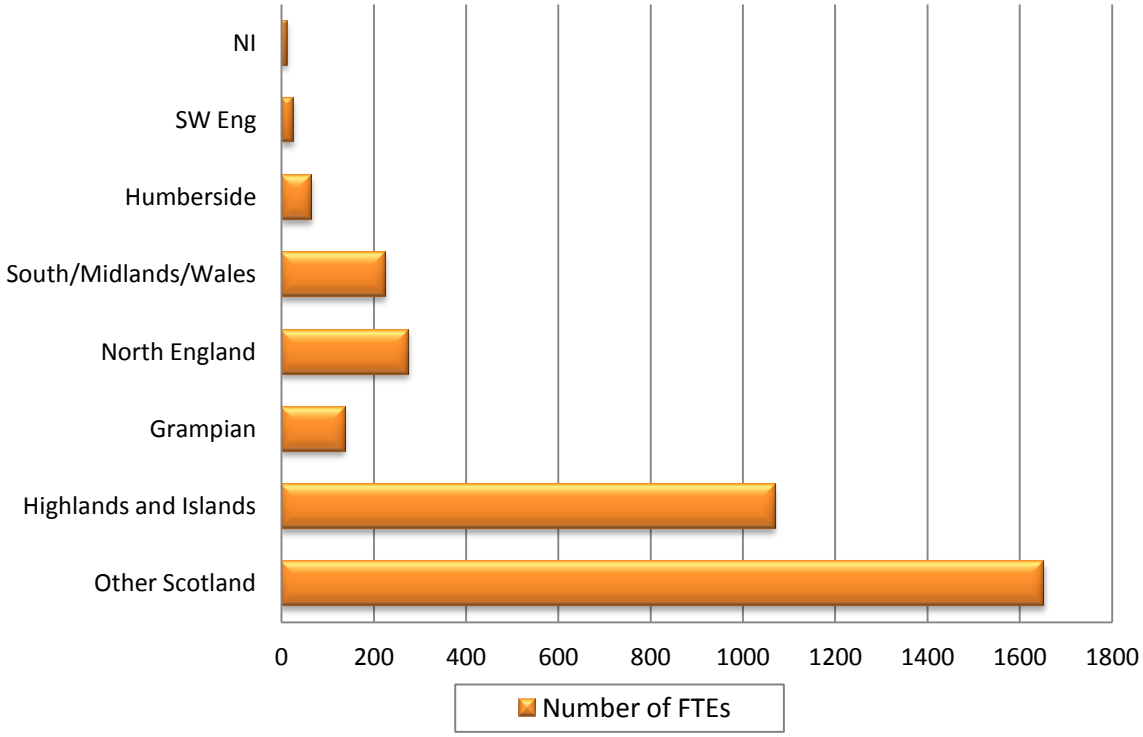


Figure 1.13 Distribution of UK salmon employment by region

5. Research strategy and methods

5. Research strategy and methods

The research strategy for our entire processing sector research involved defining the stakeholders, agreeing the research objectives, defining the research scope and methods, and a plan to secure industry engagement.

5.1 Defining the stakeholders

The stakeholders were defined as the fish processing industry by the UK Government, specifically the Marine Management Organisation, and Marine Scotland.

5.2 Research objectives

The research objectives were to:

1. Collect, estimate and produce data which enables the UK government to meet its obligations under the EU data collection framework EC Decision 2008/949 pertaining to fish processing enterprises.
2. Update the Seafish processor database.

5.3 Research methods

The research involved two data collection tasks and the methods employed for obtaining the data included a combination of primary and secondary research.

The first task was concerned with industry performance and involved a financial survey supplemented by existing financial data available from Companies House. As the financial year to be reported on was 2010, the companies were identified from the previous census undertaken in 2010.

The second task, which produced the results from which this report is based, involved a new census survey of all UK processing activity in the UK for 2012. Data from both research tasks was then analysed to generate the findings and meet the deliverables.

5.4 Task 1 - Financial survey

Those companies categorised as seafood processing businesses constituted "the population"; these were approached to participate in the financial survey. A very short questionnaire was designed to allow very simple and straightforward responses concerning the data required (table 1). This information was supplemented with published financial information on seafood processors available from Companies House.

The financial survey was conducted as follows:

1. A database was constructed (using Microsoft Excel) to contain the financial data on participating seafood processors and data from Companies House
2. Research assistants invited all seafood processing companies to participate
3. All data gathered was stored on paper copies before entry into the database

A number of businesses were unwilling to participate in the survey. Where possible these companies were approached by Seafish staff with personal

contact to provide assurance and again seek participation. However, in many cases this was not possible and reasons given by companies included:

1. Commercial sensitivity
2. Lack of time to compile relevant data
3. Lack of available data
4. Lack of value from participating in the exercise

Table 1 Data to be collected from fish processing enterprises*	
Variable Group	**Variable**
Income	Turnover
	Subsidies
	Other Income
Personnel Costs	Wages and salaries of staff
	Imputed value of unpaid labour
Energy Costs	Energy costs
Raw Material Costs	Purchase of fish and other raw materials for production
Other Operational Costs	Other operational costs
Capital Costs	Depreciation of capital
	Financial costs net
Extraordinary Costs	Extraordinary costs net
Capital Value	Total value of assets
Net Investments	Net Investments
Debt	Debt
Employment	Number of persons employed
	FTE National
Number of enterprises	

*2008/949/EC Appendix XII (based on the requirements of EC decision 2008/949/EC in accordance with the UK national programme)

5.5 Task 2 - Census survey

The census survey defined the population of the UK seafood processing industry. A list of possible seafood processing companies was compiled from several sources: the 2010 census of the processing industry; the Seafish contact management system; Seafish levy database; and a list of food processing companies having a fish processing licence from the Food Standards Agency.

Each company on the list of possible seafood processing units was contacted by letter with an attached short questionnaire. A telephone survey was undertaken for all sites that had not returned the questionnaire. Companies were asked for confirmation of business details as well as details of their business activity (if they processed seafood, traded seafood or neither, species handled, proportion of turnover from seafood processing, nature of processing activity). As we have accumulated more email addresses in recent years we were also able to contact a lot of processing sites by email if we had no success by post or telephone.

The census survey was conducted as follows:

1. A database was constructed (using Microsoft Access) to contain the list of potential seafood processors (c.950), and the survey data
2. Research assistants contacted all potential seafood processors by letter, telephone and email
3. Companies were categorised as seafood processing businesses or otherwise
4. All data gathered was stored on paper copies before entry into database

5.6 Data input and analysis

Data from the financial survey was received from companies, and entered into the financial database to minimise input errors. All data was analysed using a STATA programme routine which sourced data directly from the survey database and accounts data (sourced from Companies House). The STATA routine combined the data and analysed according to a statistical methodology designed to produce the required deliverables. Some partially completed survey returns meant that data on all variables for all participating companies was not comprehensive.

When undertaking the census survey, researchers received or produced from phone calls, completed questionnaires and entered survey data directly into an Access database from which reports were produced for analysis.

Appendix
Data Tables

Appendix 1 Sea fish processing industry tables

UK sea fish processing industry population: FTEs and processing units					
Sea fish processors	2000	2004	2008	2010	2012
No. of UK FTE jobs	22,256	18,180	14,660	14,331	11,864
No. of processing units	541	573	479	384	325
Average FTEs per unit	41	32	31	37	37

Table 1.1 UK sea fish processing industry population: FTEs and units

Reason not included in 2012	Units	FTE Jobs
Dissolved	38	1,700
No longer processing	36	1,215
Turnover now >50%	22	1,277
Now salmon processor	9	193
Total	105	4,385

Figure 1.1 Processing sites not included in 2012

FTE Band	2008	2010	2012
1-10	255	189	147
11-25	108	88	78
26-50	44	45	42
51-100	41	33	33
101+	31	29	25
Total	479	384	325

Figure 1.2 Number of processing units by size (FTE band)

FTE Band	2004	2008	2010	2012
1-10 FTEs	1,579	1,400	986	737
11-25 FTEs	1,964	1,781	1,420	1,251
26-50 FTEs	2,349	1,600	1,679	1,553
51-100 FTEs	3,385	2,944	2,324	2,479
101+ FTEs	8,903	6,935	7,922	5,844
Total	18,180	14,660	14,331	11,864

Figure 1.3 Industry employment by processing unit size

Species	2004	2008	2010	2012
Demersal only	4,335	1,899	2,446	2,450
Mixed species	9,596	8,467	8,494	6,149
Pelagic only	762	785	789	914
Shellfish only	3,487	3,504	2,602	2,351
Total	18,180	14,660	14,331	11,864

Figure 1.4 Industry employment by species processed

Process type	2004	2008	2010	2012
Primary	226	220	159	119
Mixed	283	201	170	159
Secondary	64	58	55	47
Total	573	479	384	325

Figure 1.5 Sea fish processing units by process type

Process type	2004	2008	2010	2012
Primary	2,812	3,051	2,545	1,565
Mixed	10,025	8,186	6,979	6,106
Secondary	5,343	3,423	4,807	4,192
Total	18,180	14,660	14,331	11,864

Figure 1.6 Industry employment by process type

Age Range	Units	FTE Employees
0-5 Years	15	239
6-10 Years	44	1,427
11-15 Years	35	1,004
16-25 Years	59	2,148
26-50 Years	111	4,517
51-100 Years	45	2,158
over 100 Years	16	371
Total	325	11,864

Figure 1.7 Age of processing units

Region	Primary	Mixed	Secondary	Total
Humberside	37	18	11	66
Grampian	23	33	7	63
North England	16	20	11	47
South/Midlands/Wales	12	23	7	42
Other Scotland	6	27	4	37
S W England	14	17	3	34
Highlands and Islands	6	12	1	19
N. Ireland	5	9	3	17
Grand Total	119	159	47	325

Figure 1.8 Sea fish processing units by region

Region	Primary	Mixed	Secondary	Total
Humberside	510	705	2,008	3,223
Grampian	239	1,900	1,349	3,488
South/Midlands/Wales	80	972	240	1,292
North England	180	493	305	978
Other Scotland	226	762	100	1,088
S W England	101	911	74	1,086
Highlands and Islands	161	192	20	373
N. Ireland	68	171	97	336
Grand Total	1,565	6,106	4,193	11,864

Figure 1.9 Industry FTE employment by region

Appendix 2 Salmon processing industry tables

UK salmon processing industry population: FTEs and processing units						
Region	Scotland			UK		
Period covered	2008	2010	2012	2008	2010	2012
No. of FTE jobs	4,073	3,737	2,859	5,223	4,223	3,465
No. of processing unit	48	43	39	71	54	53
Average FTEs per unit	85	87	73	74	78	65

Table 1.2 UK salmon industry population: FTEs and units

Process type	2008	2010	2012
Primary	17	7	10
Mixed	38	30	31
Secondary	16	17	12
Total	71	54	53

Figure 1.10 Salmon processing units by process type

Process type	2008	2010	2012
Primary	725	410	483
Mixed	4,134	3,318	2,775
Secondary	364	495	207
Total	5,223	4,223	3,465

Figure 1.11 Salmon industry employment by process type

	Primary	Mixed	Secondary	No of units
Other Scotland	3	10	3	16
Highlands and Islands	3	8	7	18
Grampian	0	4	1	5
South/Midlands/Wales	1	3	0	4
North England	0	4	0	4
Humberside	2	1	0	3
S W England	0	1	1	2
N. Ireland	1	0	0	1
Grand Total	10	31	12	53

Figure 1.12 Distribution of UK salmon processing units by region

	Primary	Mixed	Secondary	No of FTEs
Other Scotland	239	1,346	68	1,653
Highlands and Islands	189	749	131	1,069
Grampian	0	131	6	137
North England	0	276	0	276
South/Midlands/Wales	16	209	0	225
Humberside	26	40	0	66
S W England	0	25	1	26
N. Ireland	13	0	0	13
Grand Total	483	2,775	207	3,465

Figure 1.13 Distribution of UK salmon employment by region

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