

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



Review of Covid-19 impacts on the UK seafood industry: January-June 2020

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Introduction

This report aims to provide an overview of the impacts of the Covid-19 pandemic on the UK seafood sector in the first half of 2020. 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.

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 sector.

We have drawn on qualitative and quantitative data available at the time of writing, including official statistics, industry insights and published news articles. At the end of this report links to data sources and other resources are provided where possible to allow readers to access detail further to the top line information provided here.

Report Status

This report will be produced quarterly, providing a rolling update of Covid-19 impacts on the UK seafood industry. Subsequent reports will feature the latest industry data collected through the Seafish fleet and processing surveys as these data are finalised. We expect to release the next report, covering July-September, in December 2020.

Acknowledgements

A special thanks to those who have shared their invaluable industry insights with Seafish and colleagues across Seafish who provided input and feedback to this report, in particular our regional and insight teams.

Industry Impacts Overview

Initial impacts: January and February

Businesses selling into Chinese markets may have experienced initial impacts from Covid-19 as early as January but these were minimal. It was not until February, as cases rapidly increased in China and began to spread in Europe that UK seafood businesses really started to feel the impacts as the governments of key seafood trade nations imposed lockdowns and trade restrictions.

UK lockdown begins: March

Responding to the rapid spread of Covid-19 throughout the UK, the UK Government and devolved administrations took the decision to enter lockdown at the end of March. This placed UK seafood markets under heightened pressure. The domestic foodservice markets collapsed as eating out ended. Already much reduced export markets were further constrained by reduced transport and logistics timetables, despite seafood production and provision being classed as an essential sector. Meanwhile, retail sales surged as shoppers sought to stockpile food, with pre-packed, tinned, and frozen seafood proving most popular.

These market shocks rippled back to processing businesses. Impacts varied depending on which markets they served, but issues with regularity and reliability of logistics networks (both to source raw material and supply product to customers) were common. They also had to contend with new social distancing requirements during production.

At the supply end, demand and market uncertainty proved a considerable challenge for fishing as fish auctions closed or reduced operations, prices became increasingly volatile and markets began to fail. New social distancing requirements and reduced demand slowed aquaculture harvests. Imports also declined as a result of closures in other countries, limited transport capabilities and reduced demand from UK markets.

April onwards

Lockdown continued into April with businesses across the seafood supply chain facing extremely uncertain operating conditions. Governments offered an unprecedented level of financial support aimed at assisting businesses and employees during and immediately after the lockdown period. However, businesses had no clear idea of when export and UK foodservice markets would return. As a result, many seafood processing, wholesale and smaller retail businesses initially closed or reduced their operations.

Some closed permanently, while others adapted their products to retail formats or developed online sales, take away and delivery options to suit the new operating environment. Many fishing vessel owners created or grew existing direct sales and delivery arms of their businesses. Various local efforts were made to coordinate and stagger landings, with vessels tying up as auction market prices remained volatile and demand low, particularly for species typically exported. The potential long-term impact of prolonged disruptions on aquaculture production were also brought to light.

Overall, reduced market demand and processing capacity from April to June had a direct impact on raw material supply and price, with both UK landings and imports considerably lower than in the same period last year. Towards the end of May and into June restrictions started to ease at home and abroad and businesses slowly began to come reopen and rebuild their capacity.

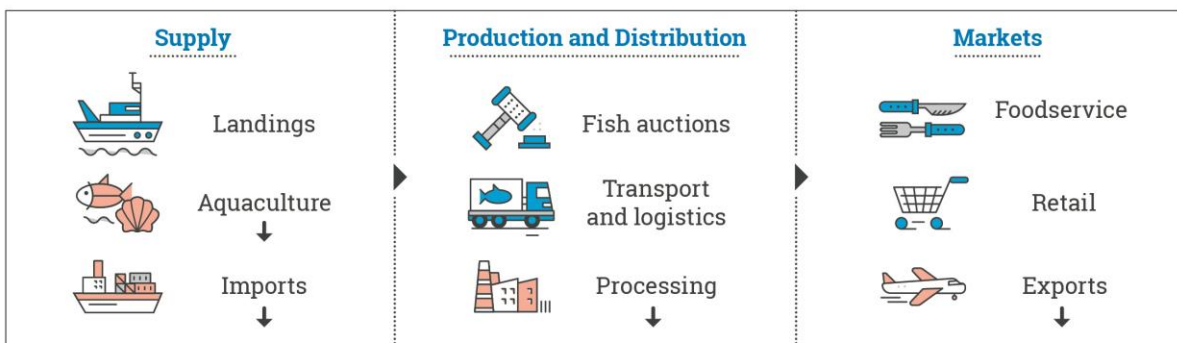
The following diagrams provide a high-level overview of the direction and magnitude of Covid-19 impacts on different parts of the UK seafood supply chain over the first six months of 2020. Nuance in the individual business impacts within each generalised segment of the supply chain are not captured in these diagrams but explained in more detail in the associated sections of this report.

Supply Chain: "Pre-Covid" (January–February 2020)

Shocks: UK operations largely business as usual in the new year, despite first reports of Covid-19 outbreak in China at the end of 2019. Chinese lockdown towards end of January reduced some UK seafood trade, negatively impacting some aquaculture and processing businesses.

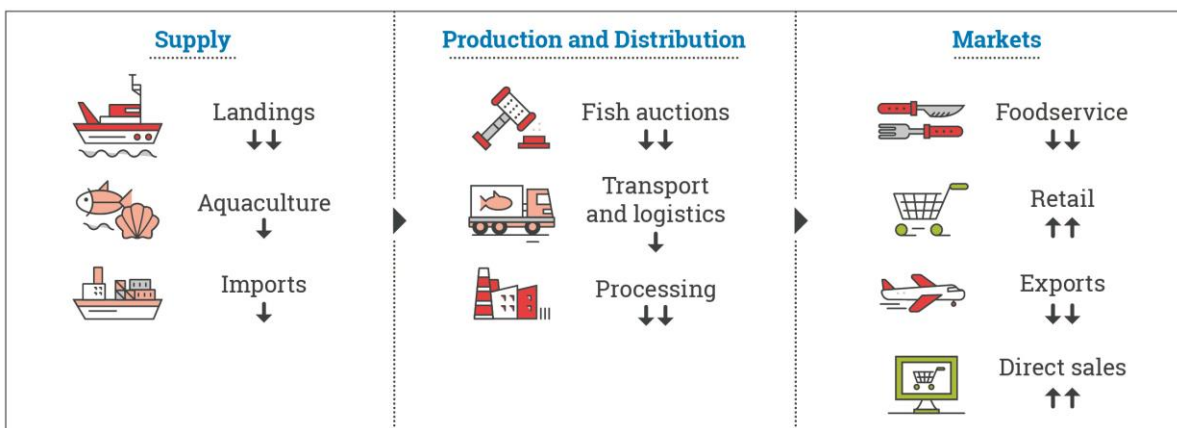
Effect of Shocks

- ↑↑ Strong positive effect
- ↑ Mild positive effect
- ↔ Similar to 2019
- ↓ Mild negative effect
- ↓↓ Strong negative effect



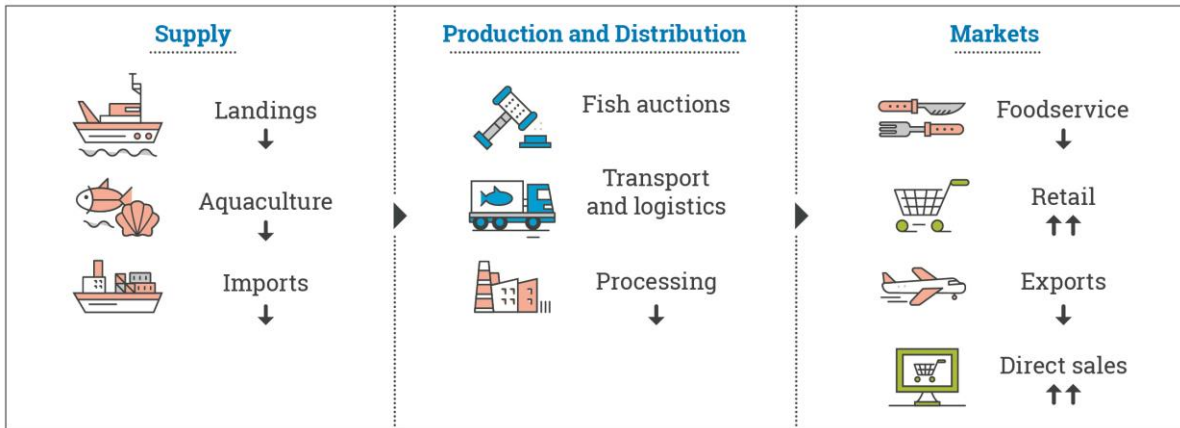
Supply Chain: "Peak lockdown" (March-May 2020)

Shocks: WHO classes Covid-19 as a pandemic. Key EU export markets for UK seafood begin to close in March. UK lockdown announced on 23 March, effectively closing the UK food service market. In response retail sales boom and new direct sales markets emerge.



Supply Chain: “Restrictions begin to ease” (June 2020)

Shocks: Lockdown restrictions begin to ease in key EU seafood export markets in late May and at home in June. In response, some businesses gradually return to work. UK retail and direct sales remain strong.



Markets

Key points

- Export markets were hit first, as key countries including China, Italy, Spain and France entered lockdown.
- Retail sales soared as the UK began life in lockdown, before levelling off to an increased level compared with the same time in 2019.
- UK foodservice markets collapsed at the end of March as lockdown put a hold on eating out and tourism.
- As businesses along the UK seafood supply chain lost access to their usual markets, new small-scale markets to sell direct to consumers emerged.



Retail

Around March - leading up to and into the UK’s lockdown - retail sales soared as consumers began stockpiling food. Many businesses supplying the domestic retail market saw a significant increase in demand.

This boost was largely driven by frozen and tinned (ambient) food sales. Chilled seafood sales saw less of an increase as shoppers looked for items that would keep for longer.

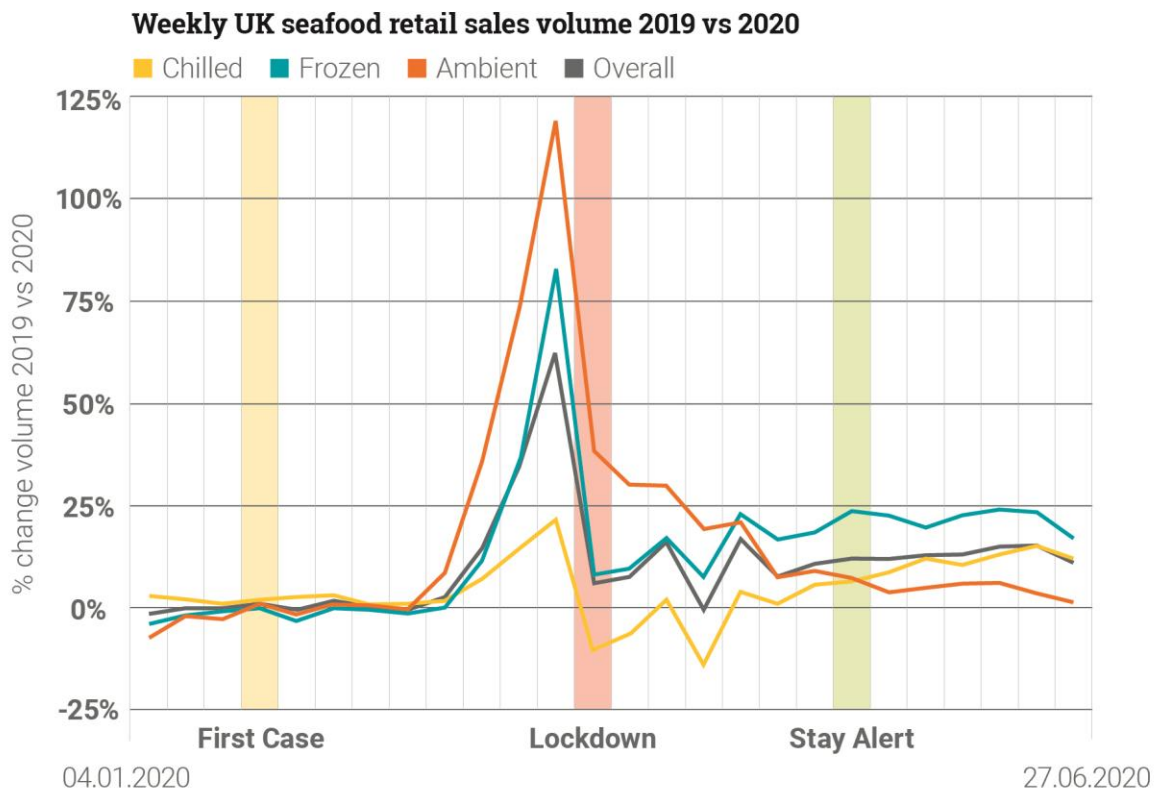
UK retail 2020 compared to 2019	Chilled	Frozen	Ambient	Overall
Volume (Jan-Jun)	+5%	+20%	+17%	+13%

Talking about the impact Scott Johnston, Technical & CSR Director at Young's Seafood noted:

“At Young’s, we saw an uplift across the board which began in the lead up to lockdown. This started with strong chilled sales and was followed by an uplift in frozen sales as shoppers switched to bigger, less frequent shops and filled up their freezers with 142m fewer shopping trips taken in between March and April.”

“We have seen this trend across the whole industry. Data shows that frozen food has grown 19.8% year on year, whilst frozen fish has increased sales by 18.3% (£41.5m) in the same period, attracting an extra 1.2m shoppers. This is largely due to the convenience of frozen food, it helps families plan their weeks, is cost effective and reduces waste. Furthermore, it makes consuming fish simpler on the whole with more meals taking place at home than ever before.”

At its peak, total seafood weekly volume sales grew by 56%. The ambient and frozen sectors benefitted the most from panic buying as shoppers stocked up on cupboard staples and filled their freezers. It was familiar favourites such as fish fingers that showed the highest growth as shoppers turned to the crumb for comfort. Anecdotal evidence also suggests that Scottish salmon proved popular amongst shoppers.



Carly Arnold, European Category Fish Director at Nomad Food, home of the Birds Eye brand, saw similar trends in other countries:

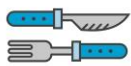
“Across Europe, lockdowns created a spike in demand across all our core fish portfolio with increased at home meal occasions. As lockdowns have eased demand for frozen fish has continued, suggesting a behaviour change to more frozen food”

consumption and reflecting the change in consumer attitude to the category and its benefits such as reduced food waste.”

Many businesses experienced such high demand that they ran down existing stock, dipping into buffers built up ahead of EU Exit or importing additional frozen raw material. Sourcing other materials, such as cardboard for packaging, presented challenges. Most species saw a boost in sales volume of over 10%, with langoustine (including scampi products), lobster and basa showing the highest volume growth compared to the same period last year.

Seeing this shift in demand, some businesses which previously supplied the domestic foodservice market sought to adapt their product formats to instead supply retail outlets, facing some challenges along the way.

After peak stockpiling subsided at the end of March, seafood retail sales fell back but remained above previous levels. By the end of June, total volume of weekly seafood sales was still 15% higher than last year and continuing to grow, albeit at a lower level.



Foodservice

As the UK entered lockdown, the foodservice market collapsed. Hotels, restaurants and pubs closed or reduced service and those remaining open did so in a limited capacity, offering take away and delivery-only options.

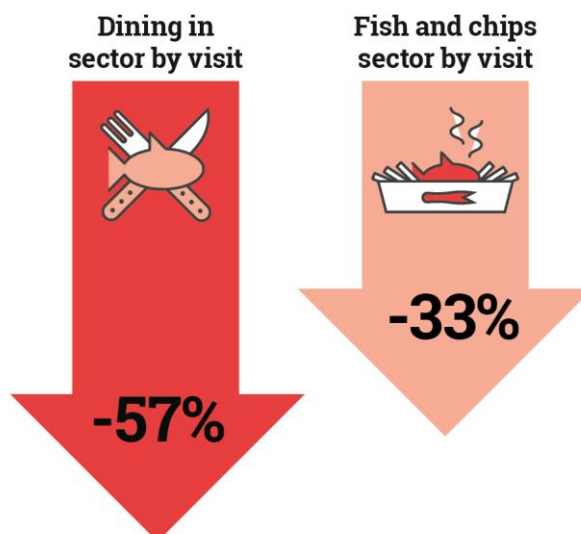
An estimated four out of five foodservice businesses closed as a consequence of lockdown, resulting in an estimated 57% drop in out of home visits by consumers in March and April.

Businesses reliant on tourists were hit particularly hard, with visits to these businesses down an estimated 72% across March and April. The government furlough support scheme also made it more profitable for some foodservice businesses to stay closed for longer, slowing the return to work as restrictions began to ease in May and June.

Many fish and chip shops closed temporarily at the start of lockdown as the volume of trade was initially unmanageable and they needed to find safe ways of working. By mid-May fish and chip shops were faring better but still running at much reduced capacity.

Andrew Crook, President of trade body the National Federation of Fish Friers (NFFF), said:

“Some shops that stayed open or reopened too soon got overrun at peak times, but many were able to successfully adopt online ordering and timed collection or delivery systems to smooth demand.”



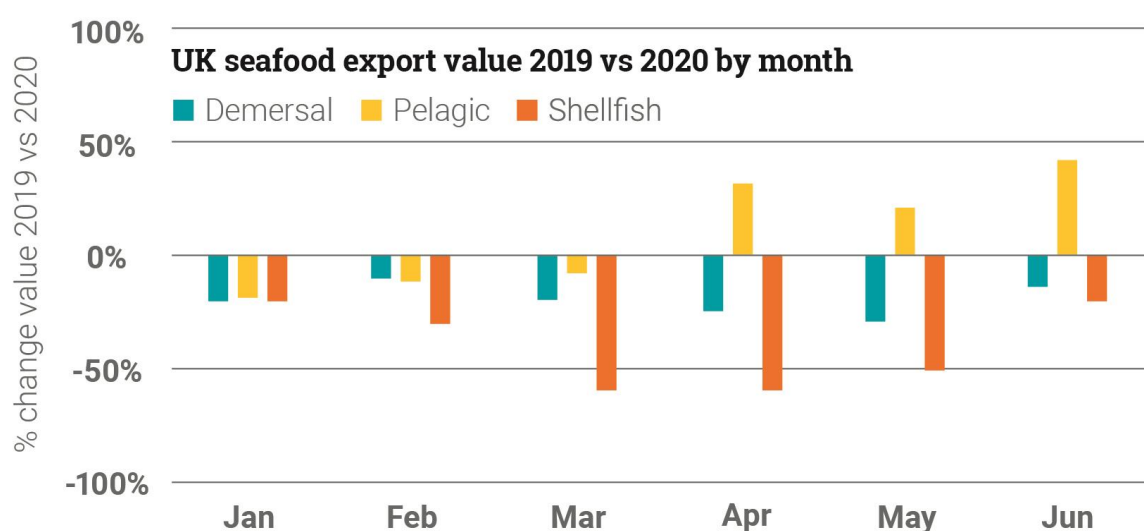
The effective closure of the UK foodservice market left their suppliers facing challenges too. Many temporarily closed or adapted their products to supply into retail markets or directly to consumers. Bad debt has also been a major issue for many suppliers and processing businesses, with some still waiting for invoices to be paid for products supplied as far back as December 2019.



Exports

As key UK seafood export nations, including China, Italy, Spain and France, implemented lockdowns and other restrictions to slow the spread of Covid-19, many UK seafood businesses lost key export markets overnight. The issues faced by exporters were compounded by issues of bad debt, with many invoices going unpaid for products supplied before lockdown restrictions began.

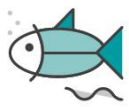
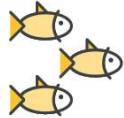

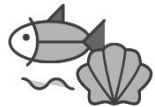
The value of UK seafood exports fell by 19% in January-March and 28% in April-June, compared to the same periods in 2019.



	Demersal	Pelagic	Shellfish
Jan	-20%	-18%	-20%
Feb	-10%	-12%	-30%
Mar	-19%	-7%	-59%
Apr	-24%	33%	-59%
May	-29%	21%	-51%
Jun	-14%	42%	-20%

Fresh fish and live shellfish account for a significant part of UK seafood export (45% of all non-salmon seafood exports for human consumption in 2019).

Many businesses soon found themselves with no immediate alternative routes to market. Any trade that did continue was further hampered by significant increases in transport costs (air and container freight) and reduced logistics services. This increased delivery time and in some cases made it impossible to get fresh product to market.

UK exports 2020 compared to 2019				
	Demersal	Pelagic	Shellfish	Overall
Value (Jan-Jun)	-20%	+2%	-40%	-23%
Volume (Jan-Jun)	-16%	+13%	-35%	-12%

1

Even as restrictions began to ease around the world from April onward, export markets were slow to return for many UK businesses and were still well below normal levels at the end of June.



Direct Sales to Consumers

In response to the widespread loss of traditional markets and an increased demand from consumers for fresh local seafood, some businesses were compelled to innovate and adapt.

From fishing vessel operators to seafood processors and fishmongers, businesses throughout the supply chain tried to make up for lost revenue by developing or expanding small-scale domestic markets for their produce by selling straight to the consumer. Other community or commercial initiatives, such as Seafood Cornwall's [#FishToYourDoor](#) initiative, have also been successful in helping fishermen engage directly with consumers.

¹ Overall figures include salmon exports.



While the rise of direct sales did attract interest, when compared to lost export, foodservice or wholesale trade the impact of this new market was minimal. For many businesses, these sorts of adaptations were not possible. However, direct sales did offer a lifeline to some businesses enabling them to continue operating, even if they came with new sets of challenges, and they seemed to have satisfied an appetite from consumers looking to shop differently during lockdown.

The following case studies illustrate some successful examples of new or expanded direct sales endeavours from across the UK seafood supply chain.

Direct sales from fishing businesses in Southeast England

In the south east of England, as across much of the UK, many local fishermen and their families were forced to explore new routes to market when they lost critical foodservice and export markets as the Covid-19 pandemic set in.

Fresh from the Boat

In Hampshire, [Fresh from the Boat](#) team Pete and Chantelle Williams saw an opportunity to expand the direct sales aspect of their business, beyond their existing mobile fish van, to include a new shop and small processing unit.

Using grants from Fishmongers Company and Seafarers UK, they opened the new shop in July supplying line caught bass and other mixed fish caught using nets on their vessel, the *Carly D*, along with catches from other local fishermen. Chantelle said:

“We’ve been supporting as many local fishing businesses as possible through the Covid-19 crisis. We’ve also been able to support many families with affordable fish packages and free food boxes for those in need.”

Sea-licious

James and Zoe Marshall who own and operate the vessel *Bleak House*, have also recently opened a new seafood retail outlet in Fareham.

Their new business venture, [Sea-licious](#), allows customers to order online and either pick up or get their locally sourced fish boxes delivered to their doors. They too source from other local vessels and markets as well as their own. Zoe explained:

“We are passionate about getting fresh fish straight from the fishing vessels to our local community and we’ve already seen a positive response to the business.”



The fresh from the Boat team with Countryfile presenter Tom Heap



James Marshall from Sea-licious

Fish boxes and ‘fakeaways’ fill gap from lost foodservice markets for Northern Ireland business

Belfast-based [Keenan Seafood](#) previously supplied a full range of fresh and frozen high-quality seafood to many of the leading hotels, restaurants and contract catering outlets throughout Northern Ireland.

As the foodservice sector was hit hard by the crisis, Keenan Seafood adapted their services to provide home delivery of a range of frozen packages of fish and shellfish, including locally sourced Portavogie prawns. These frozen boxes come with cooking sauces and recipes to enable even novice home cooks to prepare tasty and nutritious meals during lockdown.

As supplies allowed, they have also provided other bespoke fish boxes, such as Fresh Battered “Fakeaway” boxes for those missing their Friday fish supper. Robert Shanks, Commercial Director said:

“We’ve been adapting to demand as people confined to their homes have become more interested in trying a range of seafood and improving their cookery skills.”

Robert also confirmed that despite easing of lockdown restrictions, they are planning to continue these new products and expand the ranges to include fresh as well as frozen seafoods later in the year.



Keenan Seafoods preparing deliveries

Family run fishmonger expands mail order service on Scotland's west coast

Like many traditional fishmongers, [CFayre](#) in Largs had a good local customer base prior to lockdown, supporting the local shop and a small-scale online ordering service.

Prior to lockdown, 90% of their trade came through the shop, but when the Covid-19 pandemic swept the UK, owner John Watson took the difficult decision to close the shop and shift focus to the online sales arm of the business. Immediately, John saw the demand for online sales take off, with new interest in online sales and home deliveries far outstripping their normal shop sales. So much so that the small family team initially struggled to keep up with the surge in demand.

With a huge effort, working extremely long hours and putting in more effort per sale, they were able to successfully adapt their operation. While working to meet heightened online demand, they also worked hard to adapt the shop, getting it ready to re-open after seven short weeks with safe physical distancing, contactless payment and new branded high visibility screens to keep both customers and staff safe.

John confirmed that customers liked the new shop set up and sales remained good as lockdown began to ease. He noted that although online orders fell back as lockdown measures began to ease, they remained more than double what they were before. He also suggested that customer behaviours may have changed for good. He said:

“One thing is for sure, both customers and staff feel more comfortable with our new screens, so we'll be keeping them in place. We're selling more fish now than before the pandemic. We're not sure whether that's because customers have discovered us, moved away from supermarkets for their fish or are simply appreciating the quality of Scottish fish, but it's been very positive.”



The CFayre team

Production & Distribution

Key points

- **Under lockdown, businesses faced issues with regularity and reliability of transportation and logistics networks.**
- **High operating uncertainty led many processing businesses to close or reduce production temporarily as businesses utilised government support schemes and furloughed workers.**
- **Some businesses closed permanently, while others adapted their products and routes to market to suit the new operating environment.**
- **Businesses that remained open or re-opened during lockdown had to adapt to new social distancing requirements.**



Transportation & Logistics

Despite seafood being classed as an essential good, movement along the supply chain was highly disrupted as borders closed (trapping some containers); export and foodservice markets largely disappeared; and domestic demand from consumers became uncertain.

With markets in flux and no certainty about how long these disruptions would last, many logistics companies cut back on the frequency of their services making international and domestic routes less regular and reliable during lockdown.

High air and container freight costs also made access to international markets more difficult for both importers sourcing raw material and exporters supplying external markets. Most fish auctions throughout the UK stayed open, or closed only briefly to prepare for altered or reduced operations with changes in supply and demand, as well as new social distancing guidelines. Many of these markets engaged with Producer Organisations and fishermen to try to even out supply and keep market prices as buoyant as possible.

More generally, ports and harbours reliant on fishing and tourism activities were hit hard, seeing reduced income, major reductions in trade and in some cases temporary closures. However, some ancillary services such as vessel maintenance have seen additional trade as a result of the reduction in normal vessel operations.



Processing

The UK seafood processing sector is diverse and the impact of Covid-19 market shocks on businesses varied widely. Early indications suggest that 75-80% of all majority seafood processing businesses across the UK had to either reduce their activities or completely close at some point during lockdown, with some businesses closing permanently.

Those supplying foodservice or reliant on live or fresh export markets were at particular risk when these markets disappeared “overnight”. Small primary processors, such as those clustered in Northeast Scotland and the Humber region, supplying fresh whitefish to the foodservice sector were hit particularly hard.

From early April, some businesses that had closed during the initial three-week lockdown period started making plans to reopen, albeit with social distancing measures such as fewer staff on production lines.

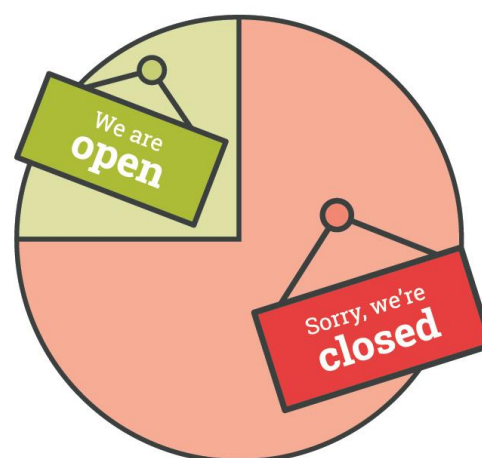
From late May a few more processors reportedly reopened for business, possibly encouraged by the phased reopening of bars and restaurants in key European export countries and the return of some domestic foodservice business offering 'click&collect' and delivery. Larger companies which are more reliant on wholesale markets were generally slower to return to business, with many only starting to take employees off furlough towards the end of June.

The remaining 20-25% of processing businesses were able to continue business at normal or higher than normal levels. These tended to be businesses with smaller workforces, even family bubbles, meaning social distancing measures were easier to implement quickly.

Some smaller businesses also started or scaled up online retail operations and home deliveries, with reports of as much as 200% increases in sales. For some, this increase in retail productivity offset the complete absence of wholesale trade and they anticipate increased profits this year.

Larger businesses supplying the retail sector also saw a surge in demand, particularly in March as consumers stockpiled ahead of lockdown. These businesses faced a unique challenge to quickly adapt operations to meet new social distancing requirements on the factory floor while also increasing production or adapting foodservice lines to meet heightened demand for retail products.

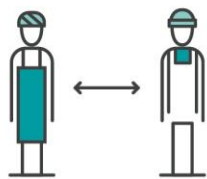
Sector experience



Industry Employees

From mid-March, businesses began to adapt operations and premises to meet social distancing requirements and changing market demand. This impacted employment across the supply chain with employees required to work from home where possible and facing cuts in hours, being furloughed or laid off. Seasonal recruitment, some apprenticeships and other employee training was put on hold.

Businesses that continued to operate during lockdown had to adapt to ensure social distancing. Shift patterns, production lines, ride share arrangements and canteen facilities were all affected. While these changes were necessary, they reduced operating efficiency and, in many cases, increased production cost per unit.



Social distancing



More personal protective equipment (PPE)



Staggering shifts



Redesigning work spaces



Moving training online

Implementing social distancing guidelines on fishing vessels was a particular challenge. Many fishing businesses chose to reduce operations as a result of the new requirements and volatile demand and market prices. Vessel owners employing foreign crew faced a further challenge with many of them not eligible for furlough or support schemes for the self-employed. Some crew members also faced visa issues in returning to port in the UK or traveling back to their countries of residence during the lockdown period.

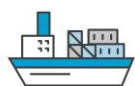
With training courses unable to continue as normal, training providers began to move some of their courses online. This allowed some training and formal learning and exams to continue during the lockdown period, removing some of the usual obstacles of gathering attendees in person.

Employees from all parts of the supply chain were found to have engaged with online learning. For example, many fishing vessel owners and their families now selling directly to the consumer were able to access webinars on how to promote and sell their catch as well as food hygiene training. Meanwhile the majority of offshore approved training providers (ATPs) closed or significantly reduced operations during lockdown.

Supply & Primary Production

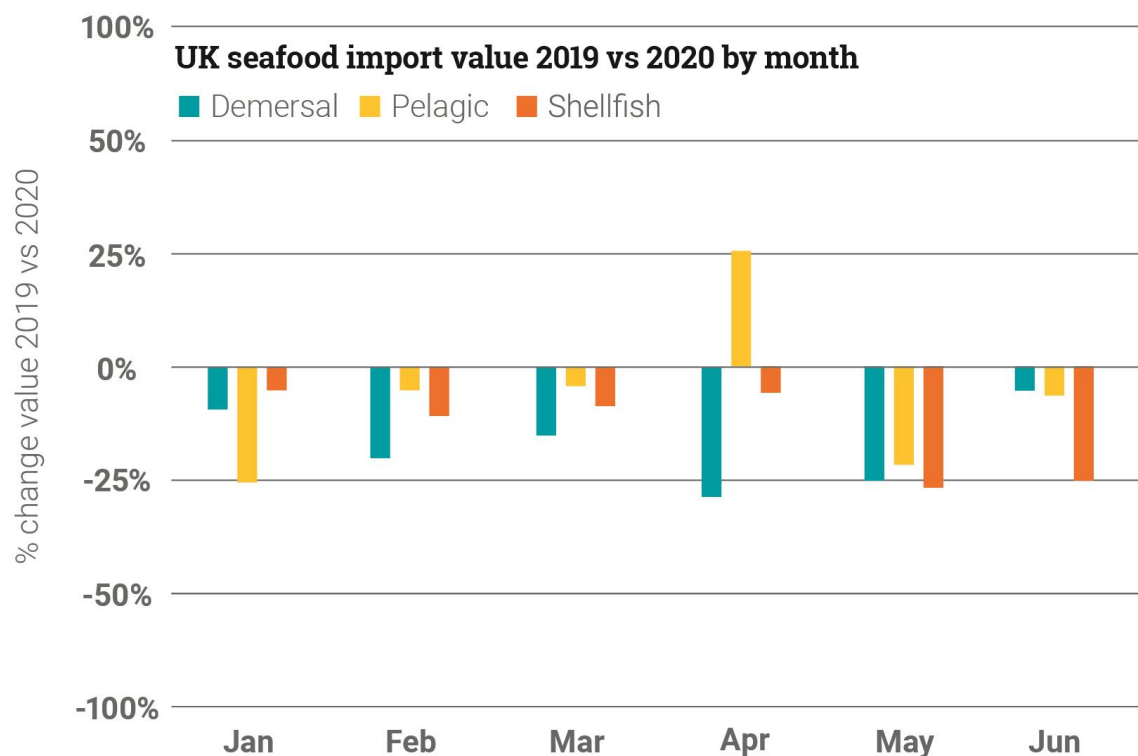
Key points

- **Reduced demand and processor capacity had a direct impact on raw material supply and price.**
- **UK landings and imports were both considerably lower than in the same period last year.**
- **Aquaculture businesses faced short-term difficulties with changing demand.**
- **Concerns have been raised around the long-term impact of Covid-19 disruptions on multi-year aquaculture production cycles.**



Imports

The supply of imported seafood slowed. This was largely as a result of closures in other countries and limited transport capabilities. With the exception of an increase in frozen whitefish imports to meet retail demand in March, import value and volume have generally been down each month compared to 2019.



	Demersal	Pelagic	Shellfish
Jan	-9%	-26%	-5%
Feb	-20%	-5%	-11%
Mar	-15%	-4%	-8%
Apr	-28%	26%	-6%
May	-25%	-22%	-27%
Jun	-5%	-6%	-25%

Seafood sectors in other countries have faced similar conditions to the UK. With their production, processing and distribution capacities much reduced, the availability of raw material for UK markets has been limited. Increased transport costs and limited logistics services have also reduced the movement of goods across borders, despite seafood's classification as an essential good.

UK imports 2020 compared to 2019				
	Demersal	Pelagic	Shellfish	Overall
Value (Jan-Jun)	-19%	-9%	-11%	-9%
Volume (Jan-Jun)	-20%	-5%	-28%	-11%

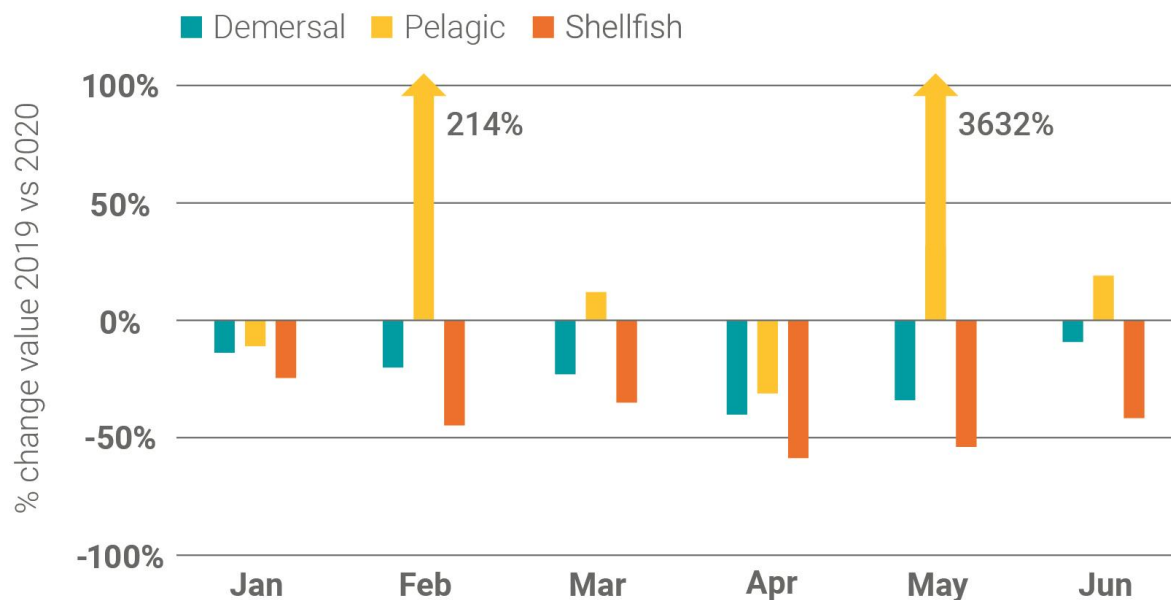


Landings

Fishing businesses faced operational uncertainties and new social distancing requirements as well as sharp drops in demand and increasingly volatile markets. The supply of wild caught fish landed into the UK was much reduced. Both landings value and volume for demersal and shellfish species were down every month in 2020 compared to 2019 (apart from a slight increase in demersal landings volume in May 2020).


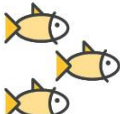


Shellfish was hit the hardest, with fishing activity stopping overnight in many parts of the UK due to the abrupt loss of markets. Pelagic landings were largely insulated from any adverse market shocks from Covid-19 as their fishing season had already finished before lockdown measures came into effect.

UK vessel landings first sale value 2019 vs 2020 by month



	Demersal	Pelagic	Shellfish
Jan	-13%	-11%	-24%
Feb	-20%	214%	-45%
Mar	-23%	12%	-35%
Apr	-39%	-32%	-58%
May	-34%	3632%	-54%
Jun	-8%	19%	-42%

Despite this reduction, there was still a general oversupply which drove raw material prices down to unsustainable levels. Efforts were made to reduce the volume of supply to levels more consistent with market demand including industry organised vessel tie-up schemes. Local co-ordination between vessels, particularly demersal whitefish vessels, as well as fish markets and merchants, saw vessels staggering trips and landings.

UK landings 2020 compared to 2019				
	Demersal	Pelagic	Shellfish	Overall
Value (Jan-Jun)	-23%	+27%	-43%	-20%
Volume (Jan-Jun)	-14%	+15%	-27%	-3%

With the absence of export markets and consistently low and unreliable prices seen at UK fish auctions, many vessel owners instead turned to direct sales at the quayside and home deliveries to keep their businesses operating.



Aquaculture

While Scottish farmed salmon continued to see strong demand - particularly in retail - farmed shellfish suffered a considerable drop in demand as foodservice outlets closed.

Some aquaculture businesses saw financial impacts from Covid-19 as early as January with cash flow affected by Chinese and other Asian markets reducing and eventually closing. Aquaculture businesses have faced unique and ongoing financial challenges as a result of fixed minimum crewing costs. This minimum crewing, required for basic stock management at farm sites, put additional financial pressure on aquaculture businesses during lockdown.

Major concerns have been raised around the effects of lockdown on future supply. Aquaculture production cycles take several years to complete, and the pandemic has acted to break the cycle of reproduction and restocking. Concerns have been raised that this crisis will lead to an undersupply of smaller, younger fish and seed to restock, and an overabundance of fish and shellfish of a sellable size and weight in the coming years.

UK Government Response²

Following the announcement of the UK lockdown, government support measures were introduced across all four devolved administrations of the UK to support individuals and businesses throughout the lockdown period.

Support schemes ranged from general employee furlough schemes, VAT deferral, small business grants, business loans and statutory sick pay relief, to seafood specific funds including fisheries and aquaculture support funds and the Scottish Seafood Business Resilience Fund.

² <https://www.gov.uk/coronavirus/business-support>

References and Data Sources

Retail

Data Source: Nielsen Scantrack UK year ending 11.07.2020

Reference:

- COVID 19 – Seafood in retail factsheet, July 2020:
<https://www.seafish.org/document/?id=6B59CD8F-DA62-49C0-8A74-2CAF2B63CA13>

Foodservice

Data Source: The NPD Group/Snap my Eats (June 2020) Foodservice COVID-19.

Foodservice data are only available at the level of Great Britain, rather than United Kingdom.

Reference:

- COVID 19 Seafood in foodservice, June 2020:
<https://www.seafish.org/document/?id=7F0B45CA-F7D5-4470-9A8C-1135C09E5270>

Trade (Imports and Exports)

Data Source: HMRC monthly data via Business Trade Statistics (BTS), processed by Seafish. 2020 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, Megrin, Monkfish, Other flatfish, Other groundfish, Plaice, Pollack, Ray, Redfish, Seabass, Seabream, Shark, Sole, Toothfish, Turbot, Whiting
- Shellfish includes: Clam, Cold Water Shrimps & Prawns, Crabs, Crayfish, Cuttlefish, Lobster, Mussels, Nephrops, Octopus, Other cephalopods, Other crustaceans, Other molluscs and aquatic invertebrates, Oyster, Prepared and preserved shrimps & prawns, Rock lobster and sea crawfish, Scallops, Sea cucumber, Squid, Warm Water Shrimps & Prawns
- All Others includes: Carp, Catfish, Caviar, livers and roes, Cobia, Eels, Nile Perch, Other freshwater fish, Other marine fish, Other products, Other salmonids, Pink cusk-eel, Ray's Bream, Salmon, Surimi, Tilapia, Trout
- Overall excludes: Non-food

Reference:

- COVID 19 impact on seafood imports and exports, May 2020:
<https://www.seafish.org/document/?id=0E993000-144A-497E-A8FE-750E96CD4B80>
- COVID 19 impact on seafood imports and exports, September 2020 (*not published yet*)
- Seafish Trade and Tariff Tool:
<https://public.tableau.com/profile/seafish#!/vizhome/SeafishTradeandTariffTool/Overview>

Processing

Data Source: Seafish processing sector census 2020 preliminary results (unpublished).

Figures are indicative only. For related info see: <https://www.seafish.org/insight-and-research/seafood-processing-data-and-insight/>

UK monthly landings

Data Source: MMO monthly landings statistics. 2020 data are preliminary.

<https://www.gov.uk/government/collections/monthly-uk-sea-fisheries-statistics#2020>

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