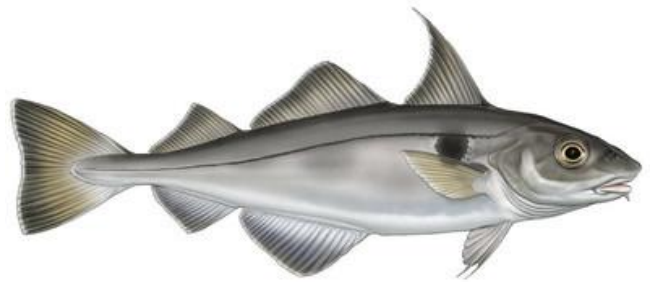


Market Insight Factsheet: Haddock 2019



This factsheet intends to inform the United Kingdom (UK) seafood industry about the performance of haddock. Where possible it provides a summary of the UK value chain for haddock examining the detail behind its overall performance. It includes;

UK trade and supply (2018*)

- Haddock imports to the UK
- Haddock exports from the UK
- Haddock landings in the UK (and landings abroad by UK vessels) (2017)
- Current stock overview

Haddock consumer sales

- Retail sales for consumers of the UK
- Haddock shopper profile GB
- Haddock trends in the GB commercial channel

Summary

UK trade and supply

In 2018* imports of haddock into the UK were predominantly from Iceland with most exports of haddock from the UK going to the Irish Republic. Haddock was the main demersal fish landed into the UK by UK vessels and experienced volume and value growth.

Total haddock consumer purchases

- Over the 52 weeks ending 20th April 2019, UK shoppers purchased just over 24,610 tonnes of haddock equating to a retail value of £241.6m.
- By volume, haddock was the 5th bestselling fish across all seafood species. Older, less affluent couples are more likely to purchase haddock.
- Haddock is a popular seafood species in foodservice with 93m servings in the 52wks to December 2018. It is most popular in the quick service channel.

UK trade and supply

The following sections provide details of total haddock imports and exports; comparing provisional HMRC data from 2018* to finalised data of 2017 (HMRC, via BTS, accessed through Seafish Trade and Tariff Tool, 2018*). Additionally a current stock overview of haddock is provided (Seafish Risk Assessment for Sourcing Seafood (RASS)).

Haddock Imports



In 2018* 5.0% of the overall value and 6.5% of the overall volume of total seafood imports to the UK were from haddock, a decrease of 1 and 0.0 percentage points respectively.

This equates to £154.9m in value and 48,742 tonnes in volume. Compared to 2017 haddock imports saw growth in both value (+20.4%) and volume (+4.5%). Such growth equates to £26.2m and 2,117 tonnes with the average price per kg up +15.1% (£0.42) from £2.26 to £3.18.

In terms of preservation formats, when looking at the top 10 import origins, 51.2% of haddock volume is imported as frozen which experienced growth of +2.1%, 48.8% is live/fresh (+11.4%).

When looking at presentation formats, again with the top 10 import origins, by volume 51.0% of haddock imports are fillets (+2.0%), 47.6% are whole/gutted (+10.6%) and 1.5% are 'other cuts' (+46.5%).

Top 10 haddock import origins *

1	Iceland	42.0%
2	China	20.6%
3	Faroe Islands	16.3%
4	Denmark	13.9%
5	Ireland	4.5%
6	Germany	1.5%
7	U.S.A	0.8%
8	France	0.4%
9	Netherlands	0.2%
10	Spain	0.03%

*The top 10 above are ranked by volume, based on the total import volume (all seafood species and products) from the top 10 importing origins.

Of the top 10 countries importing into the UK, noteworthy growth for 2018* are Iceland (+64.4%) and the Faroe Islands (+39.7%) with France, Netherlands and Spain also seeing increases. All other import countries above experienced volume declines.

Haddock Exports



In 2018* haddock made up 0.2% of the overall value and 0.3% of the overall volume of seafood exports from the UK, these percentages have remained stagnant compared to 2017.

Haddock's share of UK seafood exports equates to £4.0m in value (+14.3%) and 1,382 tonnes in volume (+14.6). This is an increase of £0.5m and 176 tonnes of haddock exported from the UK versus 2017. Average price per kg saw a decrease of -0.3% (-£0.01) from £2.90 to £2.89.

In terms of preservation format, for the top export destinations, 79.5% of haddock volume is exported as frozen which experienced growth of +18.1%. The remainder (20.5%) was exported as live/fresh (+43.2%).

With regards to presentation format, again for the top haddock export destinations, 44.9% of haddock volume exports are fillets (-10.9%), 41.8% are whole/gutted (+48.7%) and 13.3% are other cuts (+102.3%).

Top haddock export destinations*

1	Ireland	55.0%
2	France	21.7%
3	Netherlands	8.5%
4	Spain	4.5%
5	Germany	2.1%
6	Denmark	5.2%
7	Iceland	1.0%
8	China	1.6%
9	U.S.A	0.3%

*The top species above are ranked by volume, based on the total export volume (all seafood species and products) for the top destinations we export to.

Of the top export destinations noteworthy growth for 2018* are Ireland (+48.1%), France (+73.7%) with Iceland and China also seeing increases. All other export destinations experienced volume declines.

Haddock Landings (2017)

Landings into the UK by UK vessels



7.7% of the total volume of species landed into the UK by UK vessels was haddock in 2017; the highest volume across all landed demersal species. This equates to 33,560 tonnes an increase of +1.3% from 2016. In terms of value, £50.7m of haddock was landed, which was 7.0% of the total value of species landed, a +15.3% increase when compared to 2016.

Landings abroad by UK vessels



Haddock was ranked 9th demersal species in terms of volume, 0.2% of the total volume of all species landed abroad by UK vessels. This equates to 715 tonnes, a decrease of -20.3% from 2016. In terms of value, £814k of haddock was landed abroad, 0.3% of the total value of species landed abroad and a -19.0% decrease when compared to 2016.

Landings into Scotland by UK vessels



In 2017 10.5% of the total volume of species landed into Scotland by UK vessels was haddock. This equates to 31,554 tonnes, a decrease of -0.1% from 2016. In terms of value, £47.5m of haddock was landed, 10.5% of the total value of species landed and a +13.7% increase when compared to 2016.

Landings into England by UK vessels



0.7% of the total volume of species landed into England by UK vessels was haddock. This equates to 721 tonnes, an increase of +3.3% from 2016. In terms of value, £1.3m of haddock was landed, which was 0.6% of the total value of species landed and a +7.1% increase when compared to 2016.

Landings into Northern Ireland by UK vessels



6.9% of the total volume of species landed into Northern Ireland by UK vessels was haddock. This equates to 1,282 tonnes, an increase of +52.8% from 2016. In terms of value, £1.9m of haddock was landed, 6.7% of the total value of species landed and a +91.0% increase when compared to 2016.

Current stock overview

Norway, Russia, Iceland, the UK and Canada are the main catchers of haddock, landing between them around 300 thousand tonnes in 2017.

Haddock stocks are very variable, but the Arctic stock, fished principally by Norway and Russia, which accounts for around 200 thousand tonnes of catch per annum, has been in good condition over the past decade, although catches are on a decreasing trend at present. The Icelandic haddock stock is in good condition with catches of around 36,000 tonnes per annum, though catches are on a downward trajectory.

The North Sea and west of Scotland stock, landing around 30,000 tonnes per annum, is important to UK catchers and processors and has varied widely over the years but is currently harvested sustainably.

Haddock consumer purchases

Haddock is a white fish species popular with UK consumers when eating in and out of the home. This section provides details of consumer purchases of haddock in the retail market (UK); including haddock shopper profiles (GB) (Nielsen ScanTrack and HomeScan data, 20/04/2019). Additionally, the foodservice information highlights current haddock trends in commercial channels (Global Data, 2018; NPD, 2018; Technomic, 2018).

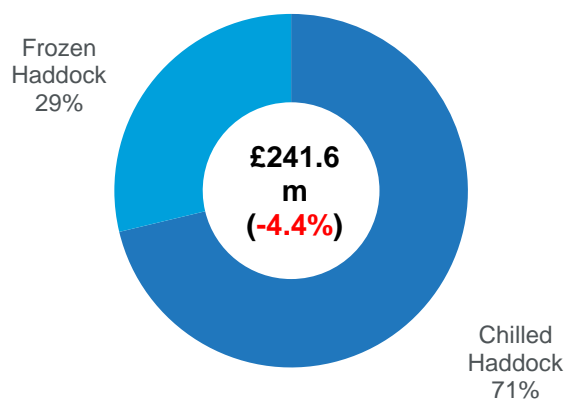
Haddock in retail (UK)



Over the 52 weeks ending 20th April 2019, UK shoppers purchased just over 24,610 tonnes of haddock equating to a retail value of £241.6m; a sales value decline of -4.4%.

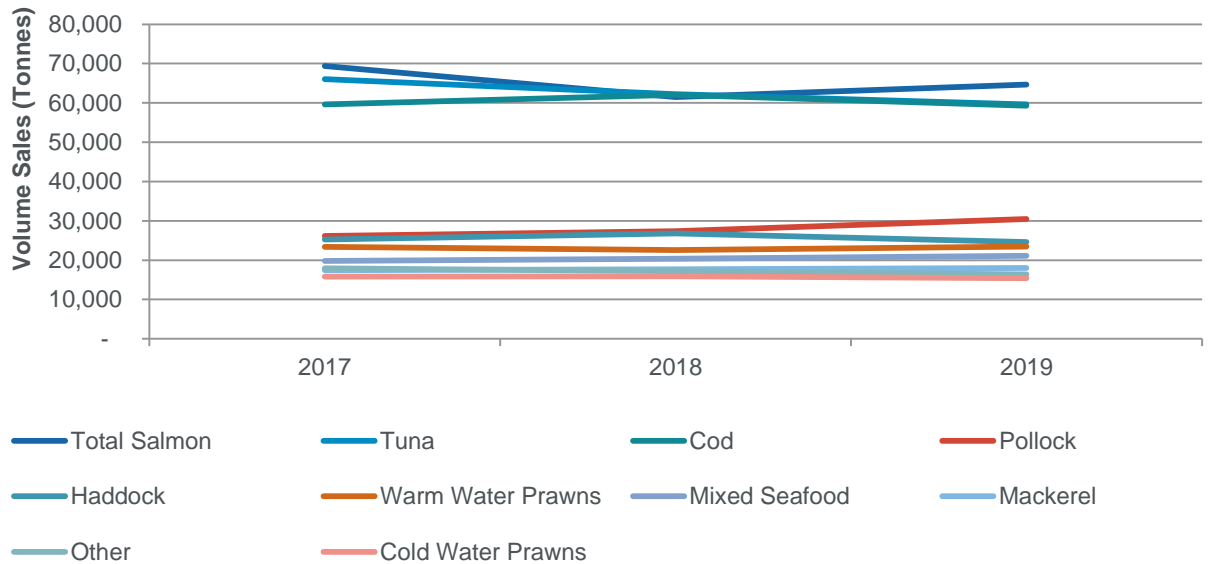
In retail, the majority (71.3%) of haddock sales are in chilled format. As illustrated and compared to 2018, value sales of haddock experienced declines in both the chilled (-1.6%) and frozen (-10.8%) sectors. In terms of volume, both sectors again experienced decline; chilled (-4.2%) frozen (-13.8%)

Haddock Retail Sales by Sector
(£m)

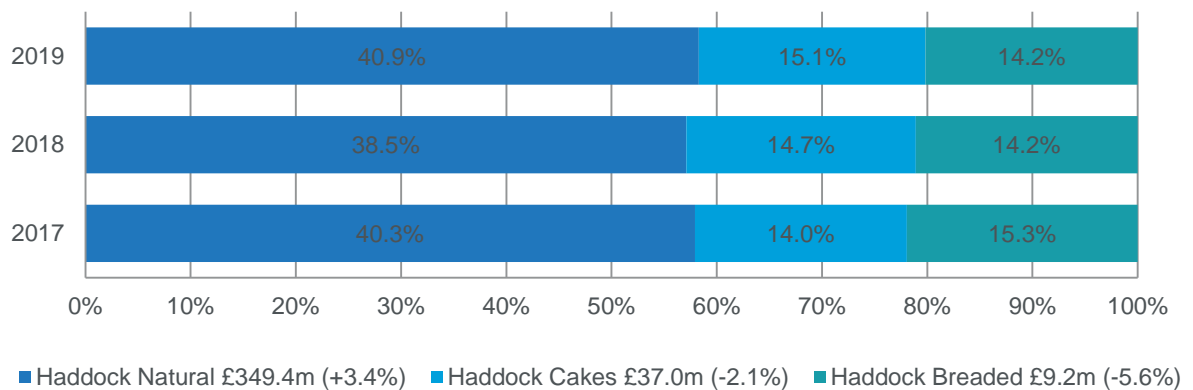


By volume, haddock was the 5th bestselling fish of all seafood species sold in retail. However, out of the top ten selling species, haddock is reporting the least favourable volume growth (-8.2) with units also experiencing declines by -6.8% when compared to 2018. Additionally the £9.82 price per kg increased (+4.1%); price per unit also increased to £3.03 (+2.6%) By product format, "natural" haddock has the largest share of value sales (40.9%), which has increased by +1.6% since 2018. Only one other segment (prepared haddock) has grown in value sales. All other segments (cakes, breaded, batter, dusted, fingers, sauce and meals), experienced declines.

**Volume of Sales of the Top 10 Species in GB Retail
(April 2017 - April 2019)**



Haddock Retail Sales by Segment £m: Top 3

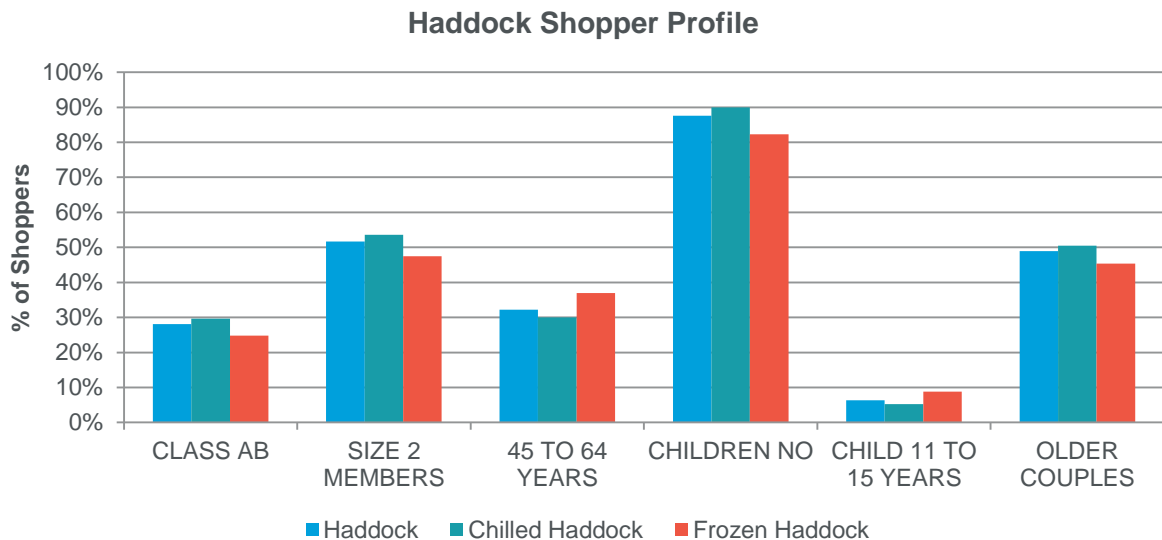


The haddock retail shopper (GB)

When comparing with the overall seafood shopper profile, the haddock shopper is quite distinct. They are less affluent, from smaller households, are older and tend not to have children.

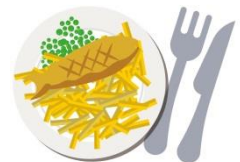
When children are present in the household of the haddock shopper, they are most likely in the age bracket of 5 to 10 years old and most likely to purchase from the frozen haddock sector.

The graph below shows the haddock shopper demographics by sector with, clear differences between the chilled and frozen haddock shopper.



Haddock in foodservice

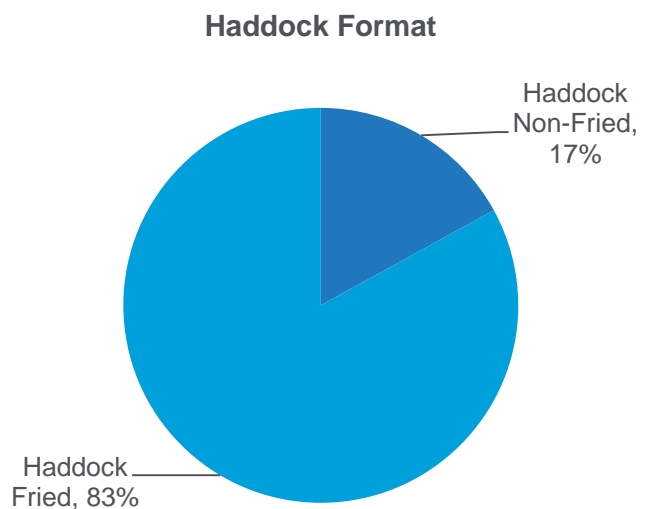
When eating out, diners purchase haddock in a range of formats, most commonly in a fried format in the Fish and Chip shop channel (Seafish, 2018).



Haddock is a popular species in the Fish and Chip shop channel and its importance in the channel is increasing (NPD, 2 yrs. ending March 2019). However, a recent survey of regular consumer in such channels (i.e. visiting more than once a month), said that they would like a greater variety of fish species to choose from, with haddock amongst the top of the wish list (Seafish, 2018).

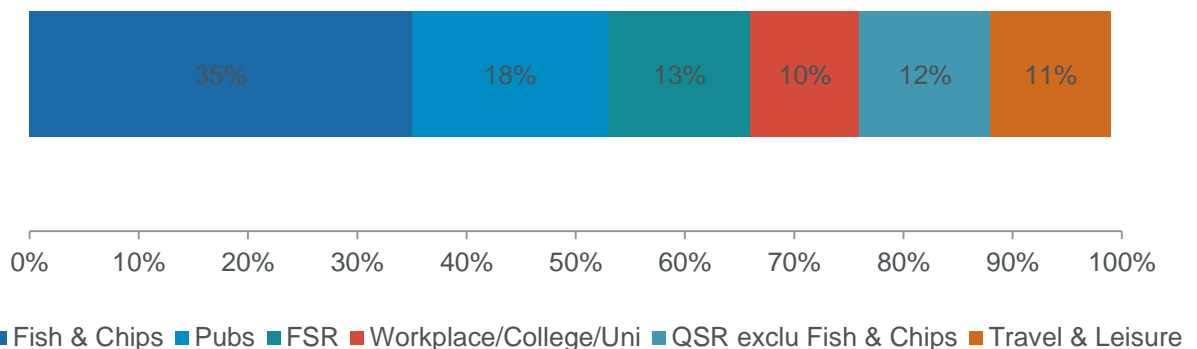
Haddock is a popular seafood species in foodservice, with 93m servings purchased in the year ending December 2018. This equates to 8% of all seafood servings purchased for out of home consumption.

Overall it has been a very positive year for



haddock in foodservice with increased servings across all the channels (NPD, 2 yrs. ending March 2019).

**Where is haddock purchased for out of home consumption?
(% of Total Haddock OOH - YE Dec 18)**



Haddock Consumer in Foodservice

Compared to total food and drink eaten out of home, haddock appeals to older consumers with almost half of all haddock visits from consumers aged 50 and over.

The haddock consumer is also more affluent particularly in the full service restaurant (FSR) channel and appeals slightly more to males. It is most popular for dinner, predominantly so in the quick service restaurant (QSR) channel. Lunchtime is more important for FSR.

Friday is still the main day consumers are purchasing haddock out of home; Saturdays to Tuesdays provide a growth opportunity (NPD, 2yr. ending March 2019).

Menu Trends

Haddock has the 8th highest menu penetration among all seafood and has seen losses in menu share since 2017. Seafood descriptors relevant to haddock on the menu include ‘fresh’, ‘responsibly caught’ and ‘sustainable’ (Technomic, 2018).

References:

- HMRC (2018*) via BTS, accessed through Seafish Trade and Tariff Tool.
- Marine Management Organisation (September 2017) National Statistics: UK sea fisheries annual statistics report 2017
- Nielsen (26.01.2019) ScanTrack Data.
- Nielsen (26.01.2019) HomeScan Data.
- NPD (2 yr. ending March 2019) Haddock Report
- Seafish (2018) Risk Assessment for Sourcing Seafood (RASS).
 - www.seafish.org/rass/
- Seafish (2018) Market Insight Factsheet Fish & Chip in Independent Fish and Chip Shops.
- Technomic (2018) Seafood Trends.

Further Readings (Subscribers Only):

- Context Report
- Haddock Report

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