

UK international seafood trade (EU and non-EU trade)

This note provides a high level summary of UK international seafood trade. It describes the main types of trade, UK export and import profile and key seafood trades.

1.1 Existing UK seafood trade portfolio

The UK seafood industry engages in various types of trade (with a range of seafood product formats):

- **Landed/source product** refers to original seafood products that are not processed and that originate either from the catching sector or from aquaculture.
- **Primary (intermediate) product.** Trade in partially processed products such as frozen fillets or headed/gutted fish. Products can be the basis for further processed, and value added products.
- **Secondary (final) product.** Final products for direct consumption such as breaded/coated fish or canned products, ready for retail; no further processing required.
- **Transit trade.** Products that do not originate in the UK, are not processed in any way, but that pass through the UK taking advantage of logistics needed to import products (such as deep water ports) or in simplifying the import process (such as clearing all material through customs at the point of entry before it enters free circulation within the EU).

For over 40 years UK seafood trade has been heavily influenced by UK membership of the EU and its predecessors (the European Community, and the European Economic Community). In 2015, UK seafood trade represented over 2m tonnes in volume and £4.15bn in value. This represented over 450 trade types covering the range of products, across a variety of species (cod, haddock, etc) and trading partners (France, Norway, USA, Nigeria etc).

a. Exports

In 2015, some 891k tonnes (liveweight) of seafood products were exported from the UK (i.e. to EU member states and the rest of the world) at a value of £1.52bn. A large share of volume – particularly whitefish and shellfish – is destined for countries in the EU. An important component of this is the high-value fresh/live trade, with short, time-critical supply chains reliant on efficient road haulage or air freight. A large share of pelagic exports are frozen and, having further reach, are destined for a broader range of markets beyond the EU (the exports to the Netherlands illustrates its importance as a trans-shipment hub with final markets likely to be in Asia – specifically China, Japan and South Korea).

b. Imports

In 2015, some 1.28m tonnes (liveweight) of seafood products were imported to the UK (i.e. from EU member states and the rest of the world) at a value of £2.63bn. A

large share of volume is sourced from countries outwith the EU. Of significance is the reliance on frozen (or prepared) seafood trade reliant on extended supply chains and seaborne transportation. A large share of whitefish imports are from countries with fisheries in high northern latitudes (Iceland, Norway, Russia, USA), pelagic imports (particularly tunas) are sourced from fisheries in equatorial regions, while shellfish tends to be sourced from prawn/shrimp aquaculture production in SE Asian and Central American countries.

Table 1.1 shows the main UK seafood export and import trades (largest share of volume and value). The volumes/values in the table relate to the key trades highlighted.

Exports	Whitefish exports (65,600t, £102m)
	Cod <i>primary products</i> to the EU
	Plaice <i>landed product</i> to the EU
	Saithe <i>primary products</i> to the EU
	Monkfish <i>landed product</i> , and <i>primary product</i> , to the EU
	Pelagic exports (191,000t, £119m)
	Mackerel <i>landed product</i> to Norway (EEA country)
	Herring <i>landed product</i> , and <i>primary product</i> , to the EU
	Tuna <i>secondary (final) products</i> to the EU
	Shellfish exports (85,200t, £236m)
	Nephrops <i>primary products</i> to the EU
	Brown crab <i>landed product</i> and <i>primary products</i> to the EU
	Scallops <i>primary products</i> to the EU
	Salmonids exports (63,280t, £194m)
Salmon <i>primary products</i> to the EU	
Imports	Whitefish imports (298,700t, £431m)
	Cod <i>primary product</i> originating from Iceland and Norway (EEA countries)
	Haddock <i>primary product</i> originating from Iceland and Norway (EEA countries)
	Alaskan Pollock <i>primary product</i> from the USA and Russia
	Pangasius <i>primary product</i> from Vietnam
	"Fish" – a whitefish <i>secondary product</i> from the EU
	"Deep frozen fish fillets" - a whitefish <i>secondary product</i> from the EU
	Pelagic imports (168,000t, £246m)
	Tuna <i>secondary (final product)</i> from the EU
	Tuna <i>secondary (final product)</i> from Mauritius, Seychelles, Ecuador
	Mackerel <i>secondary (final) products</i> from the EU
	Sardines <i>secondary (final) products</i> from Morocco
	Shellfish imports (74,000t, £320m)
	Cold water prawn <i>secondary (final) products</i> from the EU
	Cold water prawn <i>secondary (final) products</i> from Canada
	Warm water prawn <i>secondary (final) products</i> from Vietnam/India
	Scallops <i>primary products</i> from the EU
	Scallops <i>primary products</i> from the USA
	Salmonids imports (58,000t, £215m)
Salmon <i>transit trade</i> with Norway (EEA country)	
Salmon <i>transit trade</i> with Faroes	

For further information on this document please contact: seafish@seafish.co.uk