

## UK shellfish – regional profile and current trade arrangements (including live trade)

This note provides a description of UK shellfish production. It provides a summary of sites, employment, trades and end markets. Regional profiles are provided.

In 2018 there were 353 fish processing sites<sup>1</sup> in the UK. Of these, there were 150 sites processing a mix of species including shellfish, 75 of which processed shellfish only. For the shellfish only processors, finished product was sold to UK domestic markets (68% of sales), exported to EU markets (27% of sales), and exported to the rest of the world (5% of sales).

In 2018 there were 19,179 FTE jobs in the UK seafood processing sector (including salmon and trout processing). Mixed processors working with shellfish accounted for 10,289 FTE jobs. Shellfish-only processors accounted for 2,929 FTE jobs.

In 2014<sup>2</sup>, turnover for shellfish processors in the UK was £790m for 82 processing sites. Since 2014 the industry has experienced a degree of consolidation with the total number of sites decreasing from 401 in 2014 to 353 in 2018, with a small increase in average number of FTE jobs per site.

### Grampian

- In 2018 there were 15 mixed processing sites in Grampian which processed shellfish; these 15 sites supported 2,125 full-time equivalent (FTE) jobs in 2018. Five of these sites exported a proportion of their products.
- Five sites in Grampian were shellfish-only processors in 2018.
- In 2014 turnover for shellfish-only processors in Grampian was £86,897,114 for five sites.
- Businesses primarily process and export Nephrops, scallops, brown crab, and lobster caught in the North Sea (mostly landed in Fraserburgh) and off the west coast of Scotland. However, shellfish are transported from all over Scotland, and even parts of England, to be processed in Grampian before being exported.
- Fresh, live and frozen products are transported by road, crossing the English Channel through the Channel Tunnel or from Dover to Calais. The Channel Tunnel is preferred by some businesses due to the critical time period on live/fresh shellfish and to meet buyer expectations
- Boulogne-sur-Mer, in France, is an important transit hub for Scottish shellfish exports to Europe. Shellfish products are redistributed at Boulogne by wholesalers and then transported to their final destination by road.

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<sup>1</sup> Fish processing sites defined as those which derive over 50% of their turnover from fish processing. Data on the number of sites and numbers of FTE jobs are presented only for seafood processing sites which derived over 50% of their turnover in 2018 from seafood processing activities. The data does not include wholesalers and traders who export products without processing.

<sup>2</sup> 2014 is the year for which there is the most recently available financial data from the processing sector.

- Critical period for delivery of between one and five days depending on product format and final destination. France, Spain and Italy and key destinations for products.

#### Highlands and Islands

- In 2018 there were 10 mixed processing sites in the Highlands and Islands of Scotland which processed shellfish; these sites supported 249 FTE jobs in 2018. Seven of these sites exported a proportion of their products.
- Five sites in the Highlands and Islands were shellfish-only processors in 2018.
- In 2014 turnover for shellfish-only processors in the Highlands and Islands was £12,966,086 for six sites.
- Businesses primarily process and export Nephrops, brown crab, and lobster caught off the west coast of Scotland.
- Fresh, live and frozen products are transported by road, crossing the Channel through the Channel Tunnel or from Dover to Calais. Some live Nephrops are exported by air from Edinburgh Airport to Italy or Spain.
- Boulogne-sur-Mer, in France, is an important transit hub for Scottish shellfish exports to Europe. Shellfish products are redistributed at Boulogne by wholesalers.
- Critical period for delivery of two to three days. Delays are a particular concern for businesses exporting live Nephrops; even a short delay can mean missing the market in Boulogne-sur-Mer meaning products have to be sold the next day. A 24 hour delay can increase shellfish mortality from 2-3% to as high as 50%.

#### North England inc. Humberside

- In 2018 there were 19 mixed processing sites in the North of England which processed shellfish; these sites supported 605 FTE jobs in 2018. Six of these sites exported a proportion of their products.
- Thirteen sites in the North of England were shellfish-only processors in 2018.
- In 2018 there were 13 shellfish only processing sites in North England; ten exported a proportion of their products.
- Despite being England's seafood processing hub, there was only 12 mixed processing sites in Humber processing shellfish in 2018 which supported 3,841 FTE jobs in 2018, five of these sites exported a proportion of their products. Only one site in Humberside was a shellfish-only site (the industry in this region is more heavily focused on whitefish processing).
- In 2014 combined turnover for shellfish-only processors in the North of England and Humberside was £210,512,997 for 16 sites.

#### SW England

- In 2018 there were 27 mixed processing sites in the south-west of England which processed shellfish; these sites supported 658 FTE jobs in 2018. Eight of these sites exported a proportion of their products.
- Twelve sites in SW England were shellfish only processors in 2018.
- In 2014 turnover for shellfish-only processors in the SW England was £80,460,025 for 15 sites.
- Businesses primarily process and export scallops, cuttlefish, whelks, and squid caught in the English Channel and Celtic Sea.

- Some frozen shellfish products are exported to Asia (South Korea) by container ship. Trade to South Korea is carried out through tariff reduced quotas based on a bilateral agreement with the EU.
- Scallops are often exported shucked and fresh. Other products can be exported fresh or frozen. Products are exported by truck through ports in the southwest (Plymouth, Poole, and Portsmouth) to France or Spain, or via Dover or the Channel Tunnel to France.
- Critical time period for delivery is two days, however this is often a commercial necessity based on the expectations of the buyer rather than the shelf-life of products.
- The most important seasons for shellfish exports are August to October and the run up to Christmas.

#### South England & Midlands

- In 2018 there were 31 mixed processing sites in the South of England and the Midlands; these sites supported 1,016 FTE jobs in 2018. Ten of these sites exported a proportion of their products.
- Seventeen sites in the South of England and Midlands were shellfish-only processors in 2018.
- In 2014 turnover for shellfish-only processors in the South England and Midlands was £192,850,073 for 17 sites.

#### Northern Ireland

- In 2018 there were seven mixed processing sites in Northern Ireland which processed shellfish; these sites supported 359 FTE jobs. Four of these sites exported a proportion of their products.
- Six sites in Northern Ireland were shellfish-only processors in 2018.
- In 2014 turnover for shellfish-only processors in the Northern Ireland was £62,172,182 for nine sites.
- Businesses primarily process and export Nephrops, scallops and brown crab caught in the Irish Sea and Atlantic which are landed both in Northern Ireland and the Republic of Ireland. Shellfish landed in the Republic of Ireland are transported to factories in Northern Ireland by road. Some businesses process shellfish from England which is transported to Northern Ireland by ferry via Dublin.
- Shellfish are exported to France Spain and Italy by road through the Republic of Ireland, to England and then through the Channel Tunnel. The Belfast to Cairnryan ferry route is not widely used by processors exporting to Europe as it is slower than exporting via Dublin.
- Some shellfish are exported to Asia, including China and South Korea. Frozen shellfish are exported to Asia by container ship.
- The most important season for shellfish exports is August to December.

#### Wales

- In 2018 there were seven mixed processing sites in Wales which processed shellfish; these sites supported 52 FTE jobs in 2018. Three of these sites exported a proportion of their products.
- Six sites in Wales were shellfish-only processors in 2018.
- Businesses primary export brown crab, prawns, mussels, spider crab and lobster caught or farmed (in the case of mussels) off the coast of Wales.

- Shellfish are exported to France, Spain and the Netherlands through ports on the south coast of England (Plymouth, Portsmouth, and Dover) and east coast (Harwich and Hull).
- Critical time period for delivery ranges is two days for live brown crabs, delays can lead to mortalities. Live mussels are depurated by a processor in the Netherlands and then transported to buyers within 24 hours.
- The most important seasons for exports are June to December for brown crab and May to July for spider crab. Lobsters are exported all year round.

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Table A1.5: Numbers of mixed processing sites which process shellfish, and numbers of shellfish-only processing sites and the numbers of FTE jobs they supported in 2018, by home nation and region. Turnover of shellfish-only processing sites in 2014 by region and home nation.

Region	No. of mixed sites processing shellfish in 2018	No. of FTE jobs at mixed sites processing shellfish in 2018	No. of shellfish-only sites in 2018	No. of FTE jobs at shellfish-only sites in 2018	No. of sites in analysis of turnover (2014) (£)	Turnover (£) in 2014
<b>Scotland</b>	<b>47</b>	<b>3,758</b>	<b>20</b>	<b>1,128</b>	<b>23</b>	<b>240,195,854</b>
Grampian	15	2,125	5	544	5	86,897,114
Highlands and Islands	10	249	5	141	6	12,966,086
Other Scotland	22	1,384	10	443	12	140,332,654
<b>England</b>	<b>89</b>	<b>6,120</b>	<b>43</b>	<b>1,433</b>	<b>48</b>	<b>483,823,094</b>
Humberside	12	3,841	1	*	16	210,512,997
North England	19	605	13	472		
S W England	27	658	12	179	15	80,460,025
South/Midlands	31	1,016	17	777	17	192,850,073
<b>N. Ireland</b>	<b>7</b>	<b>359</b>	<b>6</b>	<b>329</b>	<b>9</b>	<b>62,172,182</b>
<b>Wales</b>	<b>7</b>	<b>52</b>	<b>6</b>	<b>39</b>	<b>*</b>	<b>*</b>
<b>Total</b>	<b>150</b>	<b>10,289</b>	<b>75</b>	<b>2,929</b>	<b>82</b>	<b>790,291,924</b>

\*Seafish follows data confidentiality rules and does not publish aggregated data for regions or home nations with fewer than five companies. Due to the low number of shellfish processing companies in some regions data has been aggregated between regions, and in the case of Northern Ireland and Wales.

Source: Seafish Processing Sector Census 2018 and Seafish Processing Sector Financial Survey 2014.