

UK shellfish export supply chains for scallops, Nephrops, brown crab and blue mussels

This note provides a description of the current supply chain arrangement for UK exports of selected shellfish. It provides a summary of the main stages of export supply, from source to market, together with supply chain characteristics.

Under current trading conditions, supply chain arrangements for UK shellfish exports have some notable similarities and contrasts See table 1.1.

Species	Species distribution (and main producing countries)	Source	Production method	First sale (direct contract / ports / auctions / markets)	Transport	Product format	Typical markets
Crabs, Nephrops	UK waters / Eastern Atlantic (UK)	Capture	Crustaceans (pots)	Direct contracts (Bridlington / Grimsby / Scrabster / UK small ports)	Road, Air freight	Live Fresh/frozen - Whole, prepared	France, Spain, Italy, China
Nephrops	UK waters / NE Atlantic (UK)	Capture	Prawn (trawl)	Direct contracts (Fraserburgh / Mallaig / Kilkeel / Portavogie / Ardglass)	Road, Air freight	Live Fresh/frozen - Whole, shelled, preserved	France, Spain, Italy
Scallops	UK waters / Eastern Atlantic (UK)	Capture	Molluscs (dredged)	Scallops (Kircudbright / Douglas / Brixham / Shoreham)	Road	Live Fresh/frozen /preserved	France, Italy, Spain, Netherlands
Mussels	UK waters / Eastern Atlantic (UK)	Capture / Aquaculture	Molluscs (rope grown / long-lines)	Swansea / Lyme Bay (Dorset).	Road	Live	Netherlands, Republic of Ireland, Denmark
			Molluscs (bottom grown)	Mussels (Penrhyn / Warrenpoint), / Northern Ireland ports (Carlingford Lough, Belfast Lough) / Wash fishery		Fresh /preserved	

Shellfish export supply chains have different characteristics, varying by:

- Markets and formats:** Exporters sell into markets with pricing structures that reflect product freshness, quality and shelf-life. In general, higher prices will be paid for live shellfish than chilled/fresh shellfish products; the latter - in turn - will command a higher price than frozen shellfish products. Time to market is therefore a critical factor on whether an exporter can enter that market. Moreover, time to market and handling during transportation has an important bearing on the condition of the shellfish being traded, particularly in live shellfish where condition of the live animal and mortality rates are a key concern. A mortality rate of 2-3% can become 50% if there is a 24 hour delay. Frozen products are less time critical.

- Operator size and focus: Exporters include:
 - smaller operators, sourcing from local vessels, handling only one or two species and product formats, selling into a particular market with a limited number of customers. There are operators, for example, that have only focussed on EU markets, never having exported to non-EU markets.
 - medium-sized operators drawing from a wider range of sources, with a broader portfolio of species, formats and markets. There are operators, for example, who export to EU markets, non-EU markets with an EU trade agreement, and non-EU markets where there is no trade agreement.
 - Traders/wholesalers specialising in export/import trade in some species.

- Geographic location: Exporters operate from around the UK coast, from the North of Scotland to the South West of England. Given 'time-to-market' is a critical factor, location shapes the nature of the supply chains, particularly for live and chilled/fresh.

- Freight modes: Exporters rely on transport that best supports their markets, formats and geographic location. Certain transport options, e.g. air freight or the channel tunnel, are quicker and consequently more expensive. This suits supply to certain markets e.g. operators using air freight to send live shellfish to high paying markets.
 - Live shellfish can be supported by:
 - vivier trucks or refrigerated lorries (if carried dry)
 - road and ferry/channel tunnel where transport distances are short
 - air freight where transport distances are long
 - Chilled/fresh shellfish can be supported by:
 - refrigerated lorries
 - road and ferry/channel tunnel where transport distances are short
 - Frozen shellfish can be supported by:
 - refrigerated lorries
 - road and ferry/channel tunnel where transport distances are short.
 - road and container ship where transport distances are long

If operators are selling into premium markets, then a key requirement is monitoring and control of the fragile material being transported. In road transport this is achieved by having an in-house fleet of trucks, or by contracting a freight company for dedicated trucks. Other operators, with product that is more robust, may use mixed loads or back load with EU hauliers returning from the UK to the continent.

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