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# United Kingdom

# Fishery Products

# Annual

# 2002

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**Report Highlights:**
**Despite dwindling fish stocks, which continue to have an impact on the wild harvest over the long term, the UK remains a major producer of fishery products. Expansion of the aquaculture industry has helped offset the downward trend in commercial landings. The UK remains heavily reliant on imports to meet demand, with shipments increasing to 625,600 MT in CY2001. The U.S. is the key supplier of canned salmon to the UK. Additionally, shipments of Alaskan pollack and fresh and frozen Alaskan salmon showed good growth in CY2001.**

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
London [UK1], UK

Table of Contents

Executive Summary . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1
Situation & Outlook . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2
Total Edible Fishery Products . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2
Production . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2
Consumption . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 3
Trade . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 5
Salmon and Salmon Products . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 6
Salmon - Canned . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 7
Groundfish Whole/Eviscerated . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 9
Groundfish, Fillets . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 9
SECTION II - STATISTICAL TABLES . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 10
Table 1: Total Edible Fishery Products, PS&D . . . . . . . . . . . . . . . . . . . . . . . . . . . 10
Table 2: UK Wild Catch . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 11
Table 3: UK Retail Sector for Edible Fish . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 12
Table 4: Total Edible Fishery Products, Import Matrix . . . . . . . . . . . . . . . . . . . . . . 12
Table 5: Total Edible Fishery Products, Export Matrix . . . . . . . . . . . . . . . . . . . . . . 13
Table 6: Salmon & Salmon Products, PS&D . . . . . . . . . . . . . . . . . . . . . . . . . . . . 14
Table 7: Salmon & Salmon Products, Prices Table . . . . . . . . . . . . . . . . . . . . . . . . 15
Table 8: Salmon & Salmon Products, Import Matrix . . . . . . . . . . . . . . . . . . . . . . . . 16
Table 9: Salmon & Salmon Products, Export Matrix . . . . . . . . . . . . . . . . . . . . . . . . 17
Table 10: Salmon Canned, PS&D . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 18
Table 11: Salmon Canned, Prices Table . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 19
Table 12: Salmon Canned, Import Matrix . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 19
Table 13: Salmon Canned, Export Matrix . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 20
Table 14: Groundfish, Whole/Eviscerated, PS&D . . . . . . . . . . . . . . . . . . . . . . . . . 21
Table 15: Groundfish, Whole/Eviscerated, Prices Table . . . . . . . . . . . . . . . . . . . . . 22
Table 16: Groundfish, Whole/Eviscerated, Import Matrix . . . . . . . . . . . . . . . . . . . . 23
Table 17: Groundfish, Whole/Eviscerated, Export Matrix . . . . . . . . . . . . . . . . . . . . 24
Table 18: Groundfish Fillets, PS&D . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 25
Table 19: Groundfish Fillets, PS&D . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 26
Table 20: Groundfish Fillets, PS&D . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 27
Table 21: Groundfish Fillets, PS&D . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 28
Table 22: Retail Price Indices . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 29
Table 23: Market Share . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 30

## Executive Summary

Commercial landings in the UK showed an increase of 1 percent in CY2001, a notable increase given the dwindling catch from UK waters in recent years. The shift in wild catch away from demersal to pelagic and shellfish continues. The key demersal species of cod and haddock recorded decreases in landings of 24 percent and 16 percent respectively in CY2001, although landings of haddock in the current year show some signs of recovery. The wild harvest is supplemented by farmed fish production. Volumes of farmed shellfish and trout remain relatively constant, with farmed salmon production increasing, albeit at a slower rate than through the last decade.

The UK exports a significant proportion of its domestic catch. In CY2001, exports totaled 384,400 MT, with France being the key market for UK fishery products. Over the same period, the UK imported some 625,600 MT of fishery products, up 13 percent on CY2000. Imports from the U.S. increased to an estimated 34,152 MT, with increased shipments of canned salmon and Alaskan pollack entering the UK.

Consumption of fish has shown some growth in the past two years following a period of stagnation. Fish is increasingly seen as a healthy alternative to meat and the trend towards convenience / easy to prepare meal solutions has benefitted the sector. Frozen fish products have remained relatively static in terms of sales volume, while sales of fresh/chilled fish and value-added fishery products have shown annual sales growth of 5 percent and 14 percent respectively. Fishery consumption by the HRI sector remains relatively static at 165,000 MT per year.

The focus of U.S. producers on the UK fishery products market has traditionally been the canned salmon market, and the U.S. remains the key supplier to the UK. Canned seafood is ideally placed to benefit from the trends in snacking/convenience and from the positive health benefits. The sector is dominated by tuna, but canned salmon represents an estimated 28 percent of sales at the retail level. Recently, canned salmon has been characterized by heavy price promotions, reflecting the abundance of Alaskan supplies available to UK importers/retailers. Increasing volumes of fresh and frozen Alaskan salmon are available in the UK, with major retailers stocking fresh salmon in the summer months and frozen fish targeted at the HRI sector. U.S. salmon exports to the UK increased in CY2001, albeit from a small base.

With a growing import requirement for seafood, there continue to be opportunities for U.S. seafood products in the diverse UK market. For more details on the UK market for fishery products, contact FAS/London (www.usembassy.org.uk/fas/index.html)

Note: conversion rate used throughout : $1 = BPS 0.69

# Situation & Outlook

## Total Edible Fishery Products

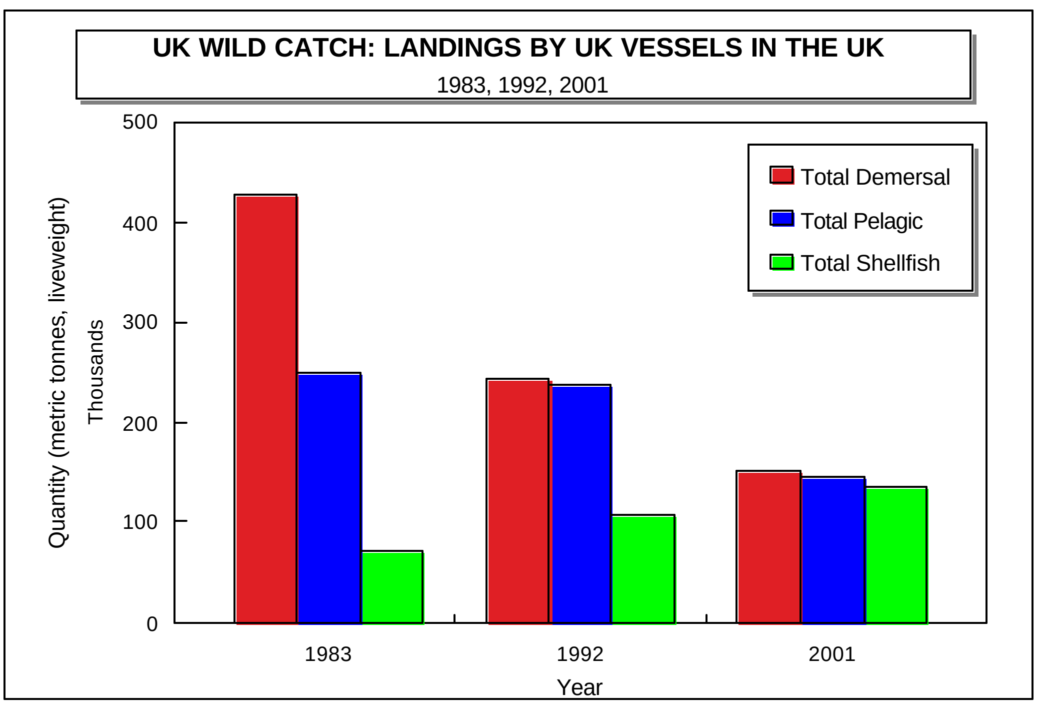
### Production

A stable wild catch and continued expansion in the aquaculture industry means that production of total edible fishery products increased to 600,200 MT in CY2001. The depletion of North Sea stocks of demersal species look continue to be offset by the pelagic and shellfish wild catch, coupled with the steady growth of fishery product output from aquaculture, such that total production is forecast little changed in CY2002 and through CY2003.

- **Wild Catch**

CY2001 represented a modest reversal of fortune for the UK wild catch. Following a long term decline in performance, volume and value of the sea fish harvest increased by 1 percent and 2 percent to 432,800 MT and BPS421.8m (US$ 607.6 m) respectively. Continued growth in total shellfish landings and a recovery of the pelagic catch were sufficient to offset the 30,000 MT reduction in demersal landings in CY2001. Landings data for the key species are presented in Table 2 of the Statistical Tables section. Total landings in the first half of CY2002 are similar to the volumes recorded in CY2001. Subsequently, little change is forecast for wild catch volume in the current year, although volumes of pelagic and shellfish are set to increase their share or production as the demersal catch continues its downwards trend.

The production problems of European fisheries have been well documented as issues of overfishing and sustainability have become increasingly important. The chart below illustrates the longer term decline in the wild catch from the UK fleet.



As a member of the EU, the UK is subject to the management and conservation initiatives of the Common Fisheries Policy (CFP). The quantity of fish that may be caught by the UK fleet is restricted through a quota system of Total Allowable Catches (TACs). With the relative importance of cod and haddock in UK demersal landings, the TAC quotas for these species can have a significant impact on the total size of the wild catch. For CY2002, cod and haddock quotas are set at 34,000 MT and 74,900 MT respectively, providing an upper limit on the harvest volumes. The CFP is set for fundamental reform in order to address ongoing issues such as falling fish stocks, industry over-capitalization and policy enforcement. Among the reform proposals is the fixing of TACs, based on recent scientific advice to ensure long term stock replenishment and at levels which maintain fish populations well above the minimum biological acceptable limits. This may result in further reductions in quotas, and therefore wild catch, for the UK fleet over the short to medium term. Indeed, a recent recommendation by scientists from the International Council for the Exploration of the Sea (ICES) advocated a total ban on cod fishing in the North Sea.

- **Aquaculture**

The UK aquaculture industry is focused on salmon production with relatively small volumes of trout and shellfish also produced by domestic fish farms. Although still a relatively new industry, aquaculture has a significant impact on total edible fishery production in the UK. In the absence of UK Government data, industry estimates place farmed salmon production in CY2001 at 138,400 MT following a fourfold increase in output through the 1990s. However, output growth has been tempered by government regulations, particularly on biomass limits. Further restrictions on environmental waste and concerns over feed ingredients and possible fish escapes have also proven constraints to expansion of salmon production. In comparison with salmon farming in Chile and Norway, the UK industry feels it is disadvantaged by the high levels of regulation that are imposed on salmon production.

Trout production faces similar legislative constraints to expansion. Total production remains relatively static at 17,000 MT per annum with approximately 75 percent of this destined for the table and the remainder used for restocking/ongrowing. Expansion of salmon production has been the response to growing consumer demand for the end product. By contrast, consumption of trout has remained stable and there has been no demand-pull effect to stimulate production levels in the trout industry.

Farmed shellfish continued to increase production volumes, due mainly to mussel cultivation. Total output in CY2001 was approximately 16,500 MT. The industry is dominated by small producers, although larger companies have entered the market, attracted by the buoyant demand and stable prices. Depending on environmental influences, production is forecast to grow steadily in the future.

Following trial work in recent years, farmed cod production in the UK is now a realistic venture. The first entirely commercial cod hatchery is raising 150,000 fish this year, with plans to raise 500,000 fish in CY2003. Farmed cod from this hatchery should be available in the market in early 2004 and target output is 6,000 MT by 2007. Commercial farming of other marine fish is also in its infancy. Small volumes of halibut are available from trial production sites and diversification into emerging marine species is likely.

**Consumption**

- **Household Consumption**

Household consumption was fairly static through the 1990s, but over the last 2 years there has been some value and volume growth in the sector (Table 3: Statistical Tables). Concerns over health, food safety scares and increasing demand for convenience/easy to prepare meal solutions have been central to this growth in fish consumption. The defined chilled category (includes fish in sauce, pies, bakes, fish-based ready meals, etc.) is the star performer, achieving an annual growth rate in value of 20 percent through CY2001. Fresh/chilled sales have also shown significant growth rates, benefitting from the health trend and increased shelf and counter space in the major retailers. Despite the widespread availability of many different and exotic species of fish, the UK consumer has been slow to experiment in the seafood market. Cod, salmon and haddock still account for an estimated 64 percent of fresh fish sales in the UK, although the share of other /exotic fish is increasing.

The frozen category has lost ground to fresh/chilled fish and is increasingly viewed as a static sector. Because of its commodity status, the frozen category was characterized by low levels of new product development and heavy price discounting. However, with the rising prices and falling supplies of cod, processors have taken the opportunity to introduce new products based on more abundant and lower priced species. New product development has been accompanied by the relaunch/repackaging of existing products.

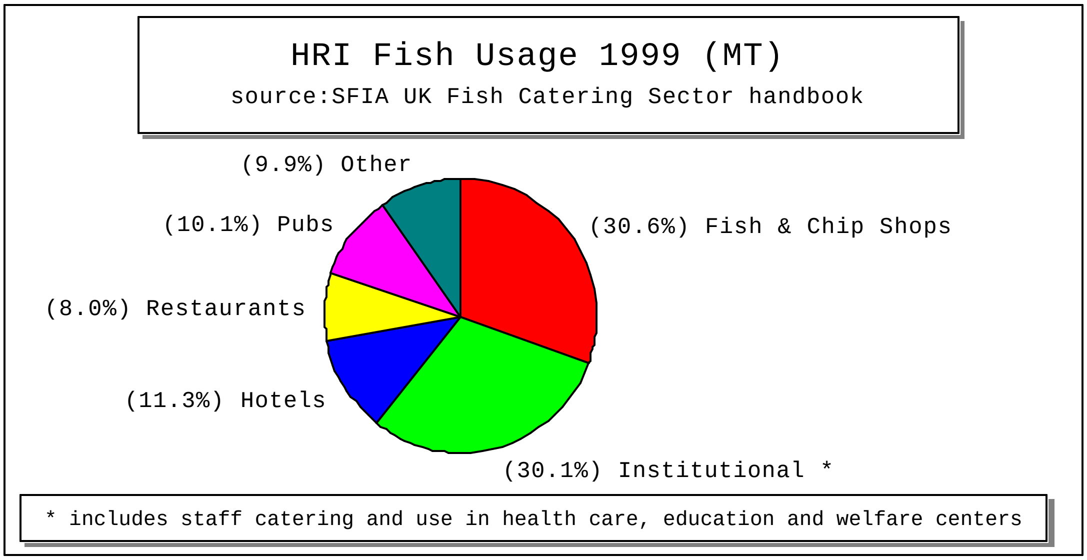
Fresh and chilled fish is increasingly prepacked. This allows the communication of cooking instructions and recipe ideas, which helps to remove one of the key barriers to increased fish consumption - lack of consumer knowledge about how to prepare fish. The majority of food purchases in the UK are from supermarkets and they are the key sales outlet for fish and fish products. Their market share is growing, largely at the expense of independent fishmongers. However, wet fish counters are not being lost, rather they are being transferred to inside the supermarkets. Wet fish counters are present in most large supermarkets and are augmented by cabinet displays of chilled and frozen fish. Table 23 illustrates the market dominance of the multiple retailers in both fresh and frozen sales of fish products.

- **HRI Consumption**

Fish usage by the HRI sector is relatively constant at approximately 165,000 MT per year. Cod, haddock and salmon are the top three species in the HRI sector, accounting for 57 percent of volume sales. This is largely a reflection on the number of fish and chip shops in the UK, which are heavy users of cod and haddock. The chart over the page shows the distribution of fish by outlet type. Species use and distribution channel (port merchant, inland merchant, wholesaler, fishmonger) varies by outlet type. For example, processed fish products are popular in the institutional catering sector and are sourced mainly from wholesalers.

- **Industry Marketing**

The Seafish Industry Authority (SFIA) is a levy funded trade association and among its several specific functions (provision of market information, research and technology, etc) is the goal of promoting fish and shellfish consumption. Seafish conducts a number of domestic marketing activities, targeted at both the consumer and the trade. Trade activities focus on cooperation with multiple retailers and independent fishmongers. Examples of recent activities include the development of in-store promotional materials, hosting




in-store cookery/tasting demonstrations, advertorial features through mainstream consumer press, and the implementation of various retail focused competitions, designed to encourage increased levels of service and quality within the fish retailing sector. The consumer communications campaign includes marketing initiatives such as public relations, provision of recipe booklets, liaising with schools and promotion through consumer food shows. In 2002, SFIA organized a ‘Seafish Week’ with the aims of raising the profile of seafood, communicating the variety that is available, and demonstrating the health benefits derived from eating seafood.

**Trade**

The long term decline in the wild catch means that the UK is increasingly reliant on imports to meet demand for fishery products. Imports in CY2001 totaled 625,600MT with imports of fresh and chilled fish increasing by 40 percent on CY2000 volumes. With the declining wild catch of demersal fish, and the export focus of the domestic salmon industry, the UK will continue to rely on imports to meet the demand for fishery products. Iceland, Norway, Denmark and Russia are the key suppliers to the UK, dominating supplies of fresh and frozen demersal fish. But with the growth in shellfish consumption in the UK, countries such as Thailand, India, Bangladesh and India are beginning to appear in the list of key suppliers. Imports from the U.S. increased significantly in CY2001 to an estimated 34,152MT. The main factor in this was increased supplies of Alaska pollack and canned Alaskan salmon entering the UK, although shipments of fresh and frozen salmon also increased from a small base.

The UK is also a considerable exporter of fishery products. France is the main export market, accounting for almost 105,000 MT of seafish, shellfish and salmon from the UK. The SFIA, through its Development and Export division, works to develop export opportunities, particularly in emerging markets. Activities typically include market research, trade missions and exhibitions.

## Salmon and Salmon Products

### Production

As noted in the Aquaculture section, production of farmed salmon in CY2001 totaled 138,400 MT. This represents an increase of 7 percent over the CY2000 production figure. This was some way down on initial industry projections for CY2001, which were based on ongrowing salmon stocks. Environmental restrictions and regulations remain a key barrier to growth. As a result, salmon production is forecast to increase by only 2-3 percent per annum, in sharp contrast to the rapid expansion that the industry saw in the 1990s.

### Trade

Throughout its relatively short lifespan, the UK salmon industry has been characterized by its focus on export markets. France is the key export market, typically accounting for 50 percent of UK salmon exports, with Spain, Germany and the U.S. all importing over 5,000 MT of UK salmon in CY2001. Relatively low salmon prices in domestic wholesale markets through CY2001 encouraged some UK producers to look to the export market for sales opportunities, where the reputation of Scottish salmon for high quality product attracts a premium price. Year on year exports of salmon products in CY2001 increased by a huge 16 percent.

At the same time as exports increased, UK imports of salmon fell by approximately one third through CY2001. Total imports were less than 14,000 MT, almost half the CY1999 salmon import volume. Norway remains the key supplier to the UK. Over recent years, the success of Chilean salmon in global markets has been well documented, with competitive pricing driving sales volumes. Indeed, Chilean shipments to the UK increased through CY2001, despite the fall in UK salmon imports. As a result, Chile's share of the import market doubled to 9.6 percent in CY2001.

Imports of U.S. salmon have also shown notable growth, increasing by 53 percent in CY2001 to 1,844 MT. This follows on from several initiatives and promotions to promote fresh and frozen Alaskan salmon in the UK market. These have included the appearance of fresh Alaskan salmon on leading retailers' wet fish counters during the summer, continued promotion of the sustainability of the MSC-certified Alaskan salmon fisheries and HRI sector promotions involving frozen salmon. With continued support from the Alaskan Seafood Marketing Institute, there remain niche opportunities for U.S. fresh and frozen salmon in UK markets.

### Consumption

With revised trade data for CY2001 indicating higher exports and lower imports than previously recorded, post has reduced the salmon consumption figure in the PS&D table (Table 6) for that year downwards. Yet salmon consumption remains strong in the UK and its growth through the 1990s has been the success story of this sector. Increased farmed salmon production led to plentiful market supplies which were available at lower prices, further stimulating demand. SFIA data estimates the UK home consumption market for fresh and chilled salmon to be worth US $207 million in CY2001. In value terms, this makes it the most important species in the fresh and chilled sector. Additionally, an estimated 28,200 MT of fresh salmon was used in smoked salmon production. This generated just under 10,000 MT of saleable product, with a 40:30:30 split between in-house consumption, HRI use and exports.

In the HRI sector, salmon use is overshadowed by cod, haddock and frozen/processed fish products that remain favorites with the fish and chip shops and the institutional catering sector. However, salmon use in 1999 was estimated at 14,250 MT. Hotels, restaurants and pubs/bars are the key HRI outlets for salmon, with high end outlets offering most potential for U.S. product.

**Marketing**

Scottish Quality Salmon (SQS) is the main trade association representing the salmon industry. SQS is dedicated to improving the quality and sustainability of salmon farming and its membership represents approximately 65 percent of industry output. In addition to salmon farmers, SQS has members from throughout the supply chain, including feed companies, salmon smokers and processors. SQS maintains the Tartan Quality Mark. This is a recognized trademark to assure retailers and consumers that all aspects of husbandry, temperature, hygiene control, processing and handling have been overseen by food certification inspectors. All Scottish salmon can be traced to its source by printed tags on the fish or on labels. Scottish salmon is also recognised in France under the Label Rouge scheme.

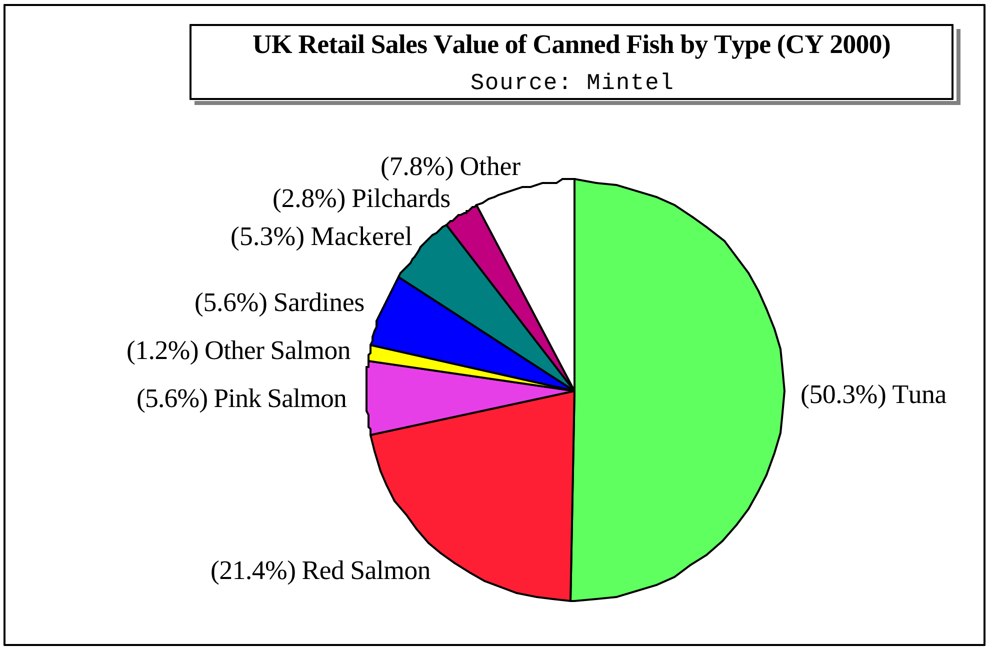
## Salmon - Canned

The UK continues to be the most important single export market for U.S. canned salmon. With no domestic production of canned salmon, the UK is almost wholly reliant on the U.S. and Canada for its supplies. Import data for CY2001 shows significant increases in UK imports of canned salmon over CY2000 levels, to abnormally high levels. That said, import data can be notoriously misleading - product that is labeled Canadian is often Alaskan salmon that has been packed or transhipped through Canada.

A key determinant of UK sales volume and retail price is obviously the relative success of the Alaskan packing season. Following the large harvests of the 1990s and increased competition in the traditional markets for frozen salmon, there was a shift towards canned salmon production in Alaska. Plentiful supplies and huge carryover stocks, all available at low prices, have allowed UK retailers to pursue aggressive and extensive price promotions on canned salmon, which have characterized the category in recent years. However, the current Alaskan harvest is modest by the standards of the 1990s, particularly of sockeye (reported to be the smallest harvest since 1978 at 22 million fish). Expectations are that this will signal an end to the extensive price promotions, particularly on red salmon, with the exception of the traditional promotion times of Christmas and Easter.

Import volumes of canned salmon appear to be returning to more traditional levels in CY2002, although retailers/suppliers are thought to be holding significant stocks, much greater than the volume carryover in previous years. Christmas 2002 is likely to feature last seasons pack promoted heavily in the UK. Importers planned a larger than normal carryover as it became likely that U.S. packers would be looking for higher prices for this years production. The high level of stocks has also had an impact on the agreement of contracts for the current (2002) pack. A leading UK trade magazine reports that British importers are in no rush to purchase early shipments as stocks held by retailers and the brands are thought to be adequate to cover sales through to the end of the year.

Recent trends in consumer behavior in the UK have seen consumers increase purchases of chilled ready meals and snack-type meal solutions while moving away from fresh and canned goods. As a result some analysts forecast tough times for the canned fish sector, viewing it as a 'store cupboard' product . However, despite static performance through the latter half of the 1990s, category sales have increased over the short term. Canned seafood is ideally placed to benefit from the trends in snacking and convenience food, and from the positive health benefits associated with fish consumption. The category is estimated by Mintel to be worth US $510 million in 2002, an increase of 14% on 1997 estimates. Although the category is dominated by tuna, sales of canned salmon are collectively forecast at US $135 million 2002. The sector has also seen new product development and television advertising.



## Groundfish Whole/Eviscerated

Consumption of whole groundfish is forecast to fall marginally in the short term, as consumers switch towards part-prepared and pre-packed seafood. Exports are also forecast to increase in CY2002. This would be the second consecutive increase of groundfish exports, with the increase mainly attributed to increased shipments of fresh and frozen cod to Spain and Portugal. However, consumption of whole groundfish utilizes only a small part of total supplies, with the majority of supplies entering the processing sector.

The diminishing wild catch means that there has been a continued long term decline in domestic production entering the processing sector. Landings of total demersal species in the first half of CY2002 again followed this downwards trend. The real exception in the first six months of 2002 was haddock, with a volume catch 34 percent up on landings in the same period in CY 2001. With an increased quota/TAC for UK landings of haddock in CY2002, post expects domestic groundfish production to increase on the depressed production levels of CY2001, when the total demersal wild catch fell by some 30,000 MT. The other source of supply for the processors is imports. Russia, Norway, the Faroe Islands and Iceland provide approximately 80 percent of the imported groundfish supplies. Imports are forecast to remain stable in the short term. This follows a significant increase in import volumes in CY2001 when shipments increased by 15 percent to help offset the dwindling domestic wild catch. Processing use of groundfish is unlikely to return to the volumes seen through the 1990s. Falling supplies have led to steadily rising prices for groundfish and encouraged processors to look for cheaper alternative species. Additionally, the growth sector in the UK fishery products market is for value added and convenience products such as ready meals, which utilize only low volumes of fish.

## Groundfish, Fillets

Similar to whole and eviscerated groundfish, domestic production for groundfish fillets is expected to recover marginally following the slump in CY2001 demersal wild catch. Imports are again fundamental to the supply of fillets, where the traditional suppliers of Iceland, Norway, Denmark, Russia and the Faroe Islands dominate the market. However, China made notable increases in shipments to the UK, with volumes increasing 70 percent in CY2001 to just under of 16,000 MT. Consumption is expected to fall slightly, with the trend towards value added and convenience having a negative impact on the demand for fillets.

## SECTION II - STATISTICAL TABLES

**Table 1: Total Edible Fishery Products, PS&D**

| | | | | | | |
|---|---|---|---|---|---|---|
| Country | United Kingdom | | | | | |
| Commodity | Total Edible Fishery Products | | | | (MT) | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Landings/Comm'l Catch | 563350 | 600200 | 556500 | 600900 | 0 | 602400 |
| Fresh/Frz Production | 260000 | 275600 | 265000 | 272400 | 0 | 270200 |
| Canned Production | 4100 | 4000 | 4100 | 4000 | 0 | 4000 |
| Cured Production | 20000 | 23800 | 20250 | 24200 | 0 | 24600 |
| Total Production | 284100 | 303400 | 289350 | 300600 | 0 | 298800 |
| Fresh/Frozen Imports | 380000 | 411800 | 385000 | 408500 | 0 | 412500 |
| Canned Imports | 156000 | 194600 | 157250 | 187800 | 0 | 192200 |
| Cured Imports | 18750 | 19200 | 18500 | 18300 | 0 | 17600 |
| TOTAL Imports | 554750 | 625600 | 560750 | 614600 | 0 | 622300 |
| Fresh/Frozen Exports | 317000 | 349900 | 320000 | 345500 | 0 | 349500 |
| Canned Exports | 22000 | 20800 | 23500 | 22000 | 0 | 22000 |
| Cured Exports | 13500 | 13700 | 13500 | 13300 | 0 | 13300 |
| TOTAL Exports | 352500 | 384400 | 357000 | 380800 | 0 | 384800 |
| Domestic Consumption | 488750 | 519800 | 494100 | 534800 | 0 | 536200 |

**Table 2: UK Wild Catch**

| LANDINGS BY UK VESSELS IN THE UK | | | | |
|---|---|---|---|---|
| Quantity (metric tonnes, liveweight) | | | | |
| | 1999 | 2000 | 2001 | % Change (00/01) |
| Cod | 39575 | 31495 | 23998 | -24 |
| Dogfish | 4832 | 5315 | 5047 | -5 |
| Haddock | 61425 | 43320 | 36485 | -16 |
| Hake | 3369 | 2969 | 1906 | -36 |
| Halibut | 246 | 200 | 153 | -24 |
| Lemon Sole | 4367 | 3823 | 3457 | -10 |
| Redfish | 1557 | 1564 | 1718 | 10 |
| Sand eels | 6785 | 9654 | 1264 | -87 |
| Skate/rays | 4986 | 4838 | 4841 | 0 |
| Sole | 1928 | 1710 | 2008 | 17 |
| Monks/Anglers | 12072 | 11483 | 11893 | 4 |
| Plaice | 8919 | 8021 | 7187 | -10 |
| Saithe (coley) | 8682 | 8522 | 8082 | -5 |
| Whiting | 22478 | 20616 | 13398 | -35 |
| Other Demersal | 29483 | 28168 | 29682 | 5 |
| **Total Demersal** | **210704** | **181698** | **151119** | **-17** |
| Herring | 45515 | 39275 | 43808 | 12 |
| Mackerel | 41304 | 54614 | 63912 | 17 |
| Sprats | 14205 | 8328 | 5009 | -40 |
| Other Pelagic | 43769 | 25593 | 33869 | 32 |
| **Total Pelagic** | **144793** | **127810** | **146598** | **15** |
| Cockles | 13122 | 20267 | 19048 | -6 |
| Crabs | 20461 | 22859 | 24329 | 6 |
| Lobsters | 1685 | 1081 | 1030 | -5 |
| Nephrops | 31092 | 28236 | 28386 | 1 |
| Other Shellfish | 44570 | 47638 | 62339 | 31 |
| **Total Shellfish** | **110930** | **120081** | **135132** | **13** |
| | | | | |
| **TOTAL** | **466427** | **429589** | **432849** | **0.76** |
| | | | | |
| | | | | |

| | |
|---|---|
| Source: Sea Fish Industry Authority | |

**Table 3: UK Retail Sector for Edible Fish**

| | 2000 | | 2001 |
|---|---|---|---|
| | Value (US$ million) | | Value (US$ million) |
| Total | 2176.6 | | 2369.8 |
| | | | |
| fresh/chilled | 962.0 | | 1095.4 |
| defined chilled | 207.5 | | 250.1 |
| frozen | 1007.2 | | 1024.2 |
| | | | |
| Source: Sea Fish Industry Authority | | | |
| | | | |

**Table 4: Total Edible Fishery Products, Import Matrix**

| Country | United Kingdom | | |
|---|---|---|---|
| Commodity | Total Edible Fishery Products | | |
| Time period | Jan - Dec | Units: | MT |
| Imports for: | 2000 | | 2001 |
| U.S. | 17464 | U.S. | 34152 |
| Others | | Others | |
| Iceland | 63253 | Iceland | 73912 |
| Norway | 58979 | Denmark | 45575 |
| Denmark | 41772 | Russia | 44132 |
| Russia | 33045 | Norway | 42192 |
| Faore Islands | 26086 | Ireland | 28172 |
| Thailand | 21430 | Faroe Islands | 28121 |
| Germany | 19930 | Thailand | 26739 |
| Ireland | 16438 | Germany | 18618 |
| Ghana | 13959 | China | 17103 |
| Spain | 10123 | Spain | 13551 |

| | | | |
|---|---|---|---|
| Total for Others | 305015 | | 338115 |
| Others not Listed | 230241 | | 253328 |
| Grand Total | 552720 | | 625595 |

**Table 5: Total Edible Fishery Products, Export Matrix**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Total Edible Fishery Products | | |
| Time period | Jan - Dec | Units: | MT |
| Exports for: | 2000 | | 2001 |
| U.S. | 8977 | U.S. | 8021 |
| Others | | Others | |
| France | 92913 | France | 104908 |
| Russia | 34232 | Spain | 34788 |
| Spain | 28946 | Nigeria | 30847 |
| Nigeria | 26123 | Germany | 28685 |
| Germany | 22734 | Russia | 26571 |
| Netherlands | 10249 | Ireland | 22995 |
| Egypt | 8162 | Netherlands | 21728 |
| Japan | 4337 | Italy | 13140 |
| Latvia | 4063 | Belgium/Lux | 7775 |
| | | Malaysia | 5065 |
| Total for Others | 231759 | | 296502 |
| Others not Listed | 121973 | | 79834 |
| Grand Total | 362709 | | 384357 |

**Table 6: Salmon & Salmon Products, PS&D**

| | | | | | | |
|---|---|---|---|---|---|---|
| Country | United Kingdom | | | | | |
| Commodity | Salmon, Whole/Eviscerated | | | | (MT) | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Beginning Stocks | 1000 | 1000 | 975 | 750 | 975 | 1100 |
| Total Production | 131500 | 138400 | 132500 | 141900 | 0 | 145400 |
| Intra-EC Imports | 9000 | 4600 | 9500 | 3100 | 0 | 4000 |
| Other Imports | 14000 | 9200 | 15000 | 9700 | 0 | 10000 |
| TOTAL Imports | 23000 | 13800 | 24500 | 12800 | 0 | 14000 |
| TOTAL SUPPLY | 155500 | 153200 | 157975 | 155450 | 975 | 160500 |
| Intra-EC Exports | 36000 | 46500 | 38000 | 38200 | 0 | 42300 |
| Other Exports | 8000 | 7900 | 7000 | 10500 | 0 | 8700 |
| TOTAL Exports | 44000 | 54400 | 45000 | 48700 | 0 | 51000 |
| Domestic Consumption | 80525 | 69850 | 81500 | 75550 | 0 | 77400 |
| Other Use/Loss | 30000 | 28200 | 30500 | 30100 | 0 | 31100 |
| TOTAL Utilization | 110525 | 98050 | 112000 | 105650 | 0 | 108500 |
| Ending Stocks | 975 | 750 | 975 | 1100 | 0 | 1000 |
| TOTAL DISTRIBUTION | 155500 | 153200 | 157975 | 155450 | 0 | 160500 |

**Table 7: Salmon & Salmon Products, Prices Table**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Salmon, Whole/Eviscerated | | |
| Prices in | pence | per uom | kilogram |
| | | | |
| Year | 2001 | 2002 | % Change |
| Jan | 270 | 231 | -14.44% |
| Feb | 270 | 195 | -27.78% |
| Mar | 270 | 195 | -27.78% |
| Apr | 270 | 195 | -27.78% |
| May | 270 | 209 | -22.59% |
| Jun | 270 | 231 | -14.44% |
| Jul | 253 | 231 | -8.70% |
| Aug | 215 | 231 | 7.44% |
| Sep | 231 | 225 | -2.60% |
| Oct | 231 | 225 | -2.60% |
| Nov | 231 | | -100.00% |
| Dec | 231 | | -100.00% |
| | | | |
| Exchange Rate | 0.6942 | Local currency/US $ | |

Source: Billingsgate Fish Market. Average mid-month price for fresh farmed salmon.

**Table 8: Salmon & Salmon Products, Import Matrix**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Salmon, Whole/Eviscerated | | |
| Time period | CY | Units: | MT |
| Imports for: | 2000 | | 2001 |
| U.S. | 1208 | U.S. | 1844 |
| Others | | Others | |
| Norway | 5497 | Norway | 3001 |
| Sweden | 4799 | Sweden | 1795 |
| Ireland | 2872 | Faroe Islands | 1759 |
| Faroe Islands | 2167 | Chile | 1327 |
| Chile | 971 | Ireland | 1257 |
| Netherlands | 761 | Denmark | 1107 |
| Denmark | 657 | China | 898 |
| China | 620 | France | 281 |
| France | 231 | Canada | 141 |
| Germany | 210 | South Korea | 135 |
| Total for Others | 18785 | | 11701 |
| Others not Listed | 397 | | 214 |
| Grand Total | 20390 | | 13759 |

**Table 9: Salmon & Salmon Products, Export Matrix**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Salmon, Whole/Eviscerated | | |
| Time period | CY | Units: | MT |
| Exports for: | 2000 | | 2001 |
| U.S. | 6510 | U.S. | 5384 |
| Others | | Others | |
| France | 19929 | France | 26990 |
| Germany | 10277 | Spain | 8124 |
| Spain | 3377 | Germany | 5391 |
| Belgium | 1852 | Belgium | 2102 |
| Ireland | 1895 | Japan | 1343 |
| Japan | 964 | Ireland | 1683 |
| Netherlands | 980 | Netherlands | 1374 |
| Canada | 227 | Denmark | 547 |
| Denmark | 205 | South Korea | 255 |
| Lebanon | 162 | Hong Kong | 229 |
| Total for Others | 39868 | | 48038 |
| Others not Listed | 503 | | 1019 |
| Grand Total | 46881 | | 54441 |

**Table 10: Salmon Canned, PS&D**

| Country | United Kingdom | | | | | |
|---|---|---|---|---|---|---|
| Commodity | Salmon, Canned | | | | (MT) | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Beginning Stocks | 1000 | 1000 | 1075 | 7900 | 900 | 2250 |
| Total Production | 0 | 0 | 0 | 0 | 0 | 0 |
| Intra-EC Imports | 200 | 1200 | 225 | 300 | 0 | 300 |
| Other Imports | 25500 | 34300 | 26000 | 23300 | 0 | 27750 |
| TOTAL Imports | 25700 | 35500 | 26225 | 23600 | 0 | 28050 |
| TOTAL SUPPLY | 26700 | 36500 | 27300 | 31500 | 900 | 30300 |
| Intra-EC Exports | 975 | 1000 | 1000 | 1300 | 0 | 1000 |
| Other Exports | 100 | 200 | 125 | 200 | 0 | 200 |
| TOTAL Exports | 1075 | 1200 | 1125 | 1500 | 0 | 1200 |
| Domestic Consumption | 24550 | 27400 | 25275 | 27750 | 0 | 27150 |
| Other Use/Loss | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Utilization | 24550 | 27400 | 25275 | 27750 | 0 | 27150 |
| Ending Stocks | 1075 | 7900 | 900 | 2250 | 0 | 1950 |
| TOTAL DISTRIBUTION | 26700 | 36500 | 27300 | 31500 | 0 | 30300 |

**Table 11: Salmon Canned, Prices Table**

| Canned Salmon Landed Prices (BPS/MT) | | | |
|---|---|---|---|
| | | | |
| Country of Origin | 1999 | 2000 | 2001 |
| | | | |
| US | 3332 | 2776 | 2546 |
| Canada | 3822 | 2605 | 1401 |
| EU (1) | 2181 | 4315 | 3724 |
| | | | |
| (1) Intra EU shipments are not subject to customs tariffs, | | | |
| | | | |
| Source: Customs and Excise, Intrastat | | | |

**Table 12: Salmon Canned, Import Matrix**

| Country | United Kingdom | | |
|---|---|---|---|
| Commodity | Salmon, Canned | | |
| Time period | CY | Units: | MT |
| Imports for: | 2000 | | 2001 |
| U.S. | 12967 | U.S. | 18505 |
| Others | | Others | |
| Canada | 12392 | Canada | 14600 |
| Chile | 718 | Netherlands | 939 |
| South Korea | 627 | Chile | 753 |
| Netherlands | 230 | South Korea | 264 |
| France | 62 | Denmark | 128 |
| Norway | 37 | Norway | 77 |
| Denmark | 37 | Phillipines | 75 |
| Ireland | 19 | France | 75 |
| Thailand | 16 | Germany | 36 |
| Italy | 10 | Ireland | 23 |
| Total for Others | 14148 | | 16970 |
| Others not Listed | 21 | | 15 |

| | | | |
|---|---|---|---|
| Grand Total | 27136 | | 35490 |

**Table 13: Salmon Canned, Export Matrix**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Salmon, Canned | | |
| Time period | CY | Units: | MT |
| Exports for: | 2000 | | 2001 |
| U.S. | 0 | U.S. | 33 |
| Others | | Others | |
| Ireland | 715 | Ireland | 596 |
| Netherlands | 229 | France | 160 |
| South Korea | 70 | Germany | 112 |
| France | 49 | Spain | 62 |
| Spain | 27 | Netherlands | 39 |
| Netherlands | 26 | Cyprus | 22 |
| Bekgium | 20 | Switzerland | 17 |
| Denmark | 14 | Greece | 17 |
| Greece | 14 | Italy | 13 |
| Italy | 14 | Belgium | 11 |
| Total for Others | 1178 | | 1049 |
| Others not Listed | 70 | | 76 |
| Grand Total | 1248 | | 1158 |

**Table 14: Groundfish, Whole/Eviscerated, PS&D**

| | | | | | | |
|---|---|---|---|---|---|---|
| Country | United Kingdom | | | | | |
| Commodity | Groundfish, Whole/Eviscerated | | | | (MT) | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Beginning Stocks | 7500 | 7500 | 7250 | 6100 | 7250 | 6300 |
| Total Production | 101000 | 77300 | 102500 | 85100 | 0 | 87000 |
| Intra-EC Imports | 10500 | 13600 | 11500 | 10900 | 0 | 11700 |
| Other Imports | 59500 | 58800 | 60500 | 61900 | 0 | 57300 |
| TOTAL Imports | 70000 | 72400 | 72000 | 72800 | 0 | 69000 |
| TOTAL SUPPLY | 178500 | 157200 | 181750 | 164000 | 7250 | 162300 |
| Intra-EC Exports | 7500 | 11000 | 7600 | 12800 | 0 | 10300 |
| Other Exports | 2000 | 2100 | 2200 | 2400 | 0 | 2000 |
| TOTAL Exports | 9500 | 13100 | 9800 | 15200 | 0 | 12300 |
| Domestic Consumption | 10250 | 10200 | 10250 | 10000 | 0 | 9800 |
| Other Use/Loss | 151500 | 127800 | 154450 | 132500 | 0 | 134200 |
| TOTAL Utilization | 161750 | 138000 | 164700 | 142500 | 0 | 144000 |
| Ending Stocks | 7250 | 6100 | 7250 | 6300 | 0 | 6000 |
| TOTAL DISTRIBUTION | 178500 | 157200 | 181750 | 164000 | 0 | 162300 |

**Table 15: Groundfish, Whole/Eviscerated, Prices Table**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Groundfish, Whole/Eviscerated | | |
| Prices in | pence | per uom | kilogram |
| | | | |
| Year | 2001 | 2002 | % Change |
| Jan | 440 | 396 | -10.00% |
| Feb | 440 | 396 | -10.00% |
| Mar | 440 | 440 | 0.00% |
| Apr | 550 | 396 | -28.00% |
| May | 418 | 440 | 5.26% |
| Jun | 440 | 418 | -5.00% |
| Jul | 440 | 462 | 5.00% |
| Aug | 440 | 462 | 5.00% |
| Sep | 484 | 484 | 0.00% |
| Oct | 484 | 484 | 0.00% |
| Nov | 440 | | -100.00% |
| Dec | 440 | | -100.00% |
| | | | |
| Exchange Rate | 0.6942 | Local currency/US $ | |

Source: Billingsgate Fish Market. Average mid-month price for fresh, headless cod.

**Table 16: Groundfish, Whole/Eviscerated, Import Matrix**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Groundfish, Whole/Eviscerated | | |
| Time period | CY | Units: | MT |
| Imports for: | 2000 | | 2001 |
| U.S. | 1053 | U.S. | 506 |
| Others | | Others | |
| Russia | 17802 | Russia | 20393 |
| Iceland | 14216 | Iceland | 16097 |
| Norway | 10237 | Faroe Islands | 11214 |
| Faroe Islands | 7953 | Norway | 10067 |
| Denmark | 5097 | Ireland | 6918 |
| Ireland | 3156 | Denmark | 5034 |
| Spain | 1233 | Sweden | 1123 |
| Germany | 889 | Germany | 298 |
| Sweden | 690 | South Africa | 155 |
| Italy | 149 | Poland | 142 |
| Total for Others | 61422 | | 71441 |
| Others not Listed | 248 | | 481 |
| Grand Total | 62723 | | 72428 |

**Table 17: Groundfish, Whole/Eviscerated, Export Matrix**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Groundfish, Whole/Eviscerated | | |
| Time period | CY | Units: | MT |
| Exports for: | 2000 | | 2001 |
| U.S. | 243 | U.S. | 243 |
| Others | | Others | |
| France | 5021 | France | 5725 |
| Portugal | 2319 | Portugal | 2490 |
| Ireland | 579 | Spain | 1613 |
| Spain | 554 | Netherlands | 662 |
| Canada | 435 | China | 559 |
| China | 358 | Norway | 399 |
| Norway | 338 | Ireland | 357 |
| Denmark | 220 | Malaysia | 147 |
| Netherlands | 116 | Canada | 145 |
| Belgium | 102 | Belgium | 133 |
| Total for Others | 10042 | | 12230 |
| Others not Listed | 414 | | 580 |
| Grand Total | 10699 | | 13053 |

**Table 18: Groundfish Fillets, PS&D**

| | | | | | | |
|---|---|---|---|---|---|---|
| Country | United Kingdom | | | | | |
| Commodity | Groundfish, Fillets | | | | (MT) | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Beginning Stocks | 16000 | 16000 | 16500 | 17700 | 17000 | 9500 |
| Total Production | 44950 | 35300 | 45000 | 38800 | 0 | 39200 |
| Intra-EC Imports | 26000 | 34900 | 25000 | 29900 | 0 | 30500 |
| Other Imports | 92000 | 95000 | 95000 | 86800 | 0 | 86300 |
| TOTAL Imports | 118000 | 129900 | 120000 | 116700 | 0 | 116800 |
| TOTAL SUPPLY | 178950 | 181200 | 181500 | 173200 | 17000 | 165500 |
| Intra-EC Exports | 5000 | 5900 | 5400 | 7500 | 0 | 6000 |
| Other Exports | 1200 | 400 | 1375 | 900 | 0 | 1000 |
| TOTAL Exports | 6200 | 6300 | 6775 | 8400 | 0 | 7000 |
| Domestic Consumption | 156250 | 157200 | 157725 | 155300 | 0 | 154000 |
| Other Use/Loss | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Utilization | 156250 | 157200 | 157725 | 155300 | 0 | 154000 |
| Ending Stocks | 16500 | 17700 | 17000 | 9500 | 0 | 4500 |
| TOTAL DISTRIBUTION | 178950 | 181200 | 181500 | 173200 | 0 | 165500 |

**Table 19: Groundfish Fillets, PS&D**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Groundfish, Fillets | | |
| Prices in | pence | per uom | kilogram |
| | | | |
| Year | 2001 | 2002 | % Change |
| Jan | 545 | 506 | -7.16% |
| Feb | 550 | 506 | -8.00% |
| Mar | 550 | 490 | -10.91% |
| Apr | 594 | 382 | -35.69% |
| May | 440 | 425 | -3.41% |
| Jun | 484 | 376 | -22.31% |
| Jul | 504 | 505 | 0.20% |
| Aug | 583 | 545 | -6.52% |
| Sep | 572 | 565 | -1.22% |
| Oct | 550 | 567 | 3.09% |
| Nov | 550 | | -100.00% |
| Dec | 484 | | -100.00% |
| | | | |
| Exchange Rate | 0.6942 | Local currency/US $ | |

Source: Billingsgate Fish Market. Average mid-month price for fresh cod fillets.

**Table 20: Groundfish Fillets, PS&D**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Groundfish, Fillets | | |
| Time period | CY | Units: | MT |
| Imports for: | 2000 | | 2001 |
| U.S. | 1550 | U.S. | 6592 |
| Others | | Others | |
| Norway | 28739 | Norway | 28237 |
| Iceland | 24084 | Iceland | 26884 |
| Denmark | 18773 | Denmark | 20671 |
| Russia | 10097 | China | 15987 |
| Faroe Islands | 9413 | Germany | 11332 |
| China | 9371 | Faroe Islands | 8961 |
| Germany | 8993 | Russia | 4738 |
| South Korea | 3950 | Spain | 1449 |
| Poland | 814 | South Korea | 1426 |
| Canada | 526 | Greenland | 842 |
| Total for Others | 114760 | | 120527 |
| Others not Listed | 1727 | | 2819 |
| Grand Total | 118037 | | 129938 |

**Table 21: Groundfish Fillets, PS&D**

| | | | |
|---|---|---|---|
| Country | United Kingdom | | |
| Commodity | Groundfish, Fillets | | |
| Time period | CY | Units: | MT |
| Exports for: | 2000 | | 2001 |
| U.S. | 68 | U.S. | 5 |
| Others | | Others | |
| France | 3411 | France | 2845 |
| Germany | 866 | Ireland | 1129 |
| Ireland | 745 | Germany | 889 |
| Netherlands | 604 | Netherlands | 644 |
| Australia | 156 | Belgium | 165 |
| Belgium | 137 | Norway | 162 |
| Spain | 130 | Spain | 142 |
| Denmark | 128 | Portugal | 37 |
| Iceland | 116 | Poland | 35 |
| Norway | 90 | Canada | 35 |
| Total for Others | 6383 | | 6083 |
| Others not Listed | 377 | | 192 |
| Grand Total | 6828 | | 6280 |

**Table 22: Retail Price Indices**

| | | | | | |
|---|---|---|---|---|---|
| Retail Price Indices | | | | | |
| | | | | | |
| January 1987 = 100 | Current Prices | | | | |
| | | | | | |
| | 1999 | 2000 | 2001 | 2002 | % change |
| Beef | 131.8 | 132.1 | 135.0 | 132 | -2.2 |
| Lamb | 155.1 | 155.7 | 165.0 | 172.9 | 4.8 |
| Pork | 129.3 | 132.1 | 145.9 | 146.2 | 0.2 |
| Bacon | 150.4 | 154.6 | 177.6 | 171.6 | -3.4 |
| Poultry Meat | 112.6 | 109.6 | 113.2 | 109.5 | -3.3 |
| Other Meat | 132.3 | 132.5 | 139.6 | 141.7 | 1.5 |
| | | | | | |
| Fish | 146.9 | 150.7 | 153.6 | 159.3 | 3.7 |
| Of which fresh | 147.6 | 159.8 | 162.4 | 167.3 | 3.0 |
| | | | | | |
| All food | 144.2 | 143.4 | 151.5 | 148.3 | -2.1 |
| | | | | | |
| All Items | 165.6 | 171.1 | 174.4 | 175.9 | 0.9 |
| | | | | | |
| Source: Office for National Statistics | | | | | |
| Quotes taken annually in June | | | | | |

**Table 23: Market Share**

| | | | | |
|---|---|---|---|---|
| Market Share by outlet type by value | | | | |
| | | | | |
| Twelve weeks ended End May | | | | |
| | | | | |
| Fresh/Chilled | | 2000 (%) | 2001 (%) | 2002 (%) |
| | | | | |
| Multiples | | 62.9 | 66.1 | 71.4 |
| Fish Mongers | | 17.3 | 18.0 | 14.3 |
| Market Stalls | | 4.0 | 2.4 | 2.5 |
| Department stores | | 10.2 | 9.0 | 8.7 |
| Other | | 5.6 | 4.5 | 3.1 |
| | | 100.0 | 100.0 | 100.0 |
| Frozen | | | | |
| | | | | |
| Top 5 Multiples (1) | | 56.9 | 53.2 | 58.8 |
| Other Multiples | | 10.9 | 12.8 | 11.4 |
| Freezer Centers | | 17.6 | 21.0 | 17.4 |
| Department Stores | | 7.2 | 5.1 | 6.3 |
| Coops | | 4.7 | 4.7 | 3.8 |
| Other | | 2.7 | 3.2 | 2.3 |
| | | | | |
| (1) Safeway, Asda, Somerfield/Kwiksave, Sainsbury & Tesco | | | | |
| | | | | |
| Source: Sea Fish Industry Authority | | | | |