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United Kingdom

Fishery Products

Annual

2001

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Report Highlights:
The UK is a major producer of seafood but is also heavily dependent on imports. In CY2000, UK production totalled almost 287,000 MT while imports were nearly 553,000 MT. The majority of UK production is from the wild harvest. However, this is in long term decline with the farmed fish sector, mainly salmon and trout, becoming increasingly important. The US remains the number one supplier of canned salmon to the UK.

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

Executive Summary

The UK is a major producer of seafood but due to continued growth in domestic consumption it is also heavily dependent on imports. In CY2000, UK production totalled 286,769 MT, an increase of 15 percent on the previous year but still well below the historic high. The UK imported 552,720 MT of seafood of which only 16,600 MT was imported from the US

The UK's wild harvest continues to decline as the EU imposes smaller and smaller quota allocations in the face of dwindling fish stocks. The farmed fish sector is extremely important and continues to grow with trout and shellfish operations increasing tonnage along with more traditional farmed salmon.

Value added fish products (chilled or frozen) and smoked fish have shown the greatest increases in demand over the period and are likely to continue to grow in popularity although the expected recession in 2001 may diminish growth of higher priced products. Oil-rich fish such as kippers, mackerel and herring have become popular with consumers due to their perceived healthy attributes and lower relative price.

The US continues to be the major player in the canned salmon market in the UK. However, unreliable UK import figures make it difficult to estimate the actual share of the market taken by the US although it is generally accepted that the US is the number one supplier. Unfavourable sterling/dollar exchange rates and a greater availability of lower priced pink salmon over higher priced red salmon hindered performance in this market over the period.

Section I: Situation & Outlook

Total Edible Fishery Products

Production

The UK commercial catch has decreased steadily since 1996 and is estimated to be 563,350 MT in CY2001, down nearly 3 percent from the previous year. Farmed fish supplies have filled some of the gap created by reduced UK quotas and the depletion of North Sea and other fish stocks.

Wild Catch

The UK wild catch totalled 429,589 MT and was valued at BPS413.9 (USD601.4) million in CY2000. This was a decrease of 8 percent in volume and 9 percent in value. Demersal landings were down 14 percent in volume with the greatest declines recorded for haddock (down 29 percent) and cod (down 20 percent). Cod, haddock, whiting and plaice accounted for 57 percent of all demersal fish landed in the UK.

Pelagic landings, at 127,810 MT were also down by 12 percent from the previous year. Increases in volumes of mackerel were outweighed by a decline in herring volumes. Herring and mackerel accounted for 73 percent of all pelagic landings.

Shellfish landings in 2000 showed an increase of 8 percent, mostly due to increased landings of crabs and cockles.

EU quotas for the UK restrict the amount of fish that may be caught. The UK quotas for cod and haddock have been reduced over the past 3 years and are likely to continue to decline due to major stock problems in the key fishing areas.

UK QUOTAS AND UPTAKE

	1999	2000	2000(*)
Cod Quota	67400	55100	32800
Uptake	33634	45552	19158
Haddock Quota	74200	70400	55000
Uptake		57333	18146

NOTE: * Data for uptake in 2001 is for Jan-June period

SOURCE: DEFRA Fisheries Division

The UK remains a net importer of the main species of demersal fish - cod, haddock and pollack - due to a continued shortage of wild fish especially in North Sea fishing areas.

Farmed Fish

An equally important factor affecting total UK fish supplies is the production of farmed salmon. Supplies in CY2000 rose just under 2 percent as increases in production have been tempered by legislation restricting environmental waste, cross breeding and concerns about feed ingredients. Strict environmental regulation has prevented the establishment of new sites. Farmed trout continues to be popular in the UK with 17,800 MT produced in CY2000.

Farmed shellfish have been gaining in importance, especially in Scotland. The most popular shellfish produced are mussels and Pacific oysters. Total Scottish production for CY2000 totalled 2,351 MT valued at more than BPS3.0 (USD4.4) million . According to a recent study by the Scottish Executive, the market for all species of farmed shellfish is buoyant. Prices in 2000 remained stable and production is expected to increase steadily over the next few years.

There is some speculation that the UK could soon be farming cod to replace the scarce supplies in the northern seas. One source expects that the UK could produce up to 4,000 MT and the Norwegians 10,000 MT of farmed cod by 2004.

Consumption

Seafood consumption demand rose by 4 percent overall in CY2000. The ratio between fresh/frozen, canned and cured seafood remained roughly the same as the previous year at 66:29:5. Cured fish consumption showed the greatest percentage gain although this remains the smallest sector overall.

Farmed salmon continues to be especially popular as it is perceived as a healthy, good value option. Other oily fish such as mackerel, kippers and herring have also showed increases in demand for the same health reasons but also due to their lower relative prices compared to white demersal type fish.

Household purchases of Defined/Chilled fish and fish products which include fish in sauce, fish pies and bakes and ready prepared fish and chips-type meals have increased steadily by 15 to 20 percent annually for the past 3 years; this market is estimated to be worth BPS88 (USD128) million. Demand in this category is expected to remain firm as consumers seek greater convenience.

Catering Sector

The demand for fish by the catering industry is expected to remain stable at approximately 165,000 MT. Fish and chips shops use roughly one third of the total fish split between cod and haddock. Hotels, staff catering and pubs together take the next third while education, health care and restaurants take the remainder. The anticipated recession and slowdown in travel in 2001 may weaken demand in the catering sector.

Trade

Continued pressure on UK wild fish supplies and systematic reductions in UK quota encourage and sustain fish imports. Imports in CY2000 totalled 552,720 MT. The top suppliers were Iceland, Norway, Denmark, Russia and the Faroe Islands. Imports from the US were 17,464 MT most of which is canned salmon.

The Seafish Industry Association (SFIA) is the main trade association responsible for raising awareness of UK seafood products. The SFIA is funded through a levy paid by UK fishermen which totals BPS8.0 (USD11.6) million. Due to difficulties in the fishing industry, the levy has been frozen at the current amount until 2003.

The SFIA has applied for grants from the UK Government's Department of Trade and Industry to attend Seafood shows in China, Singapore, Poland, the US, Germany and Russia. They recently sponsored a promotional seafood week (5-12 October 2001) to create public awareness of the healthy attributes of fish targeting retail, food service and the media. The SFIA has contributed to a 3 year project to determine the viability of haddock farming in Scotland.

Policy

The main North Sea groundfish stocks - cod, haddock, whiting and saithe have declined since the 1970's. Cod stocks are the most seriously depleted, reaching a historic low in 2000. The EU is developing a cod re-structuring plan to reduce the fishing rate and to re-build stocks over the next 5 years. This will involve limits on fishing days and larger hole size in nets. These restrictions will continue to support imports to this market.

Salmon and Salmon Products

Production

Continued pressure on cod and haddock stocks in the UK, have sustained demand for farmed fish in the UK. However, farmed salmon production increases have been curtailed by limits on the expansion of new sites and by more stringent environmental restrictions. Salmon production in CY2000 totalled 129,959 MT, up only 2 percent from the previous year, and not 10 percent as expected. Production is expected to increase by only 2 percent annually over the next few years.

There were no cases of clinical Infectious Salmon Anaemia (ISA) reported in CY2000 or the first half of 2001. Scottish salmon producers have been attempting to gain compensation from the EU for losses made as a result of having to destroy stocks where ISA had been detected. The Scottish Salmon Growers Association estimated that ISA cost the industry BPS37 (USD54) million between 1997 and1999 when cases were discovered.

Consumption

Farmed salmon prices were less variable and on average more than 25 percent below groundfish prices in CY2000. Scarce wild fish supplies look set to continue this trend with September 2001 salmon prices reported at nearly 50 percent below cod prices.

SFIA figures show retail purchases of fresh and chilled salmon dipped slightly in CY2000 but show strong increases in volume and value in the first half of 2001. Demand for frozen salmon, much of which is sold through catering outlets, is expected to remain strong. Consumption of smoked salmon, while still a small proportion of the total salmon consumed, has shown an increase of 35 percent in volume in CY2000.

Trade

UK salmon imports for CY2000 were down by nearly 20 percent at 20,582 MT. Supplies came mostly from Norway, Sweden, Ireland and the Faroe Islands. Imports from Norway showed the most dramatic fall as they were down by more than 7,500 MT over the period. Changes in tariff levels for non-EU countries have increased the price of Norwegian salmon in the UK contributing to this large fall in imports.

Imports from the US remain low at just over 1,300 MT or 6 percent of total imports. There have however been several recent initiatives to market fresh and frozen Alaska salmon in the UK market. In early 2001, one large UK fish supplier entered into a licensing agreement with the Marine Stewardship Council (MSC) for Alaskan salmon. The MSC logo has been put on this company's frozen, marinated Alaskan salmon product in the UK. The logo serves to alert consumers to the fact that the product is harvested from a sustainable source.

In the June-September 2001 period, several prominent retailers (Sainsbury, Marks and Spencer, Tesco and Waitrose) supplied and promoted fresh Alaskan salmon for the first time. As long as US supplies are available, the retailers are likely to repeat the promotion next summer. Red salmon varieties are preferred over pink as the more up-market product in the UK. Limits on UK capacity for farmed salmon will provide a continued demand for imports.

UK salmon exports are almost exclusively to other EU countries with France taking 41 percent, Germany 23 percent, and Spain, Belgium and Ireland taking 15 percent between them in CY2000.

Policy

In order to improve working relations between the various members of the salmon industry in Scotland, a Tripartite Working Group was established in mid 1999. This group consists of producers of wild salmon, farmed salmon and the Scottish Executive. Their aim is to ensure the maintenance of a healthy stock of wild salmon while promoting a sustainable aquaculture industry. The group attempts to develop area management agreements which address the problems faced by the industry due to interbreeding between wild and farmed fish as well as other environmental problems with arise from fish farming enterprises.

Scottish Quality Salmon is the main trade association representing the salmon industry. SQS maintain the Tartan Quality Mark, a recognised trademark to show 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 as SQS have an arrangement with the Label Rouge scheme.

Salmon Canned

The UK does not produce canned salmon. Therefore, the market continues to rely exclusively on imports. The US and Canada provided more than 90 percent of the UK supply in CY2000. Imports rose by 22 percent in 2000 attributable to a 6,000 MT increase in imports from Canada. According to an industry expert, this UK import data is misleading as Canadian canned product is often sourced from Alaskan salmon. Canadian salmon supply data from the period do not show the increases that would be required for such an increase in exports to the UK market. In both the US and Canada, production of canned salmon is supply driven as the Alaskan salmon is a wild product.

While Canadian prices reviewed were approximately 8 percent lower than US prices in general, there are no major price differentials in the two countries' product. However, the weakening of the pound sterling against the US dollar in CY2000 continued to disadvantage US product.

The Alaska Seafood Marketing Institute has a representative in the UK. The ASMI are involved in PR activities, advertising, as well as retail and food service merchandising. The positive attributes of Alaska as a wild, natural, healthy, and bio-sustainable product are stressed. A 24 hour hotline run through the Alaska Seafood Information Agency has been introduced, advertorials have been placed in consumer magazines, store promotions carried out and food catering firms targeted. The UK is one of the largest canned salmon markets in the world with a strong preference for red salmon varieties.

Groundfish, Whole/Eviscerated

Whole and eviscerated fish are used mainly for fresh and frozen processed foods in the UK with more than 90 percent used this way. Use by processors fell a further 18 percent in CY2000 reflecting the continued high seafood prices. While demand for value added fish products continues to increase, the volume of fish used in these processed products is low. Consumption of groundfish in whole form at 10,000 MT still comprises a small percent of the total market.

The profile of groundfish imports for CY2000 is relatively unchanged from the previous year with Russia, Iceland and the Faroe Islands providing 70 percent of the total. Overall imports have fallen 6 percent due to reduced demand by processors. Sterling's strength against the euro and other European currencies and the ever smaller UK groundfish catch have kept UK exports down. Exports will remain below 10,000 MT for the foreseeable future.

Groundfish, Fillets

UK production of groundfish fillets fell 9 percent in CY2000 in line with the fall in whole groundfish for processing. This fall continues to reflect the overall drop in domestic supply of groundfish. Imports rose to 117,892 MT in CY2000 to fill some of the gap left by domestic shortfalls. The traditional suppliers of Iceland, Norway, Denmark, Russia and the Faroe Islands have dominated the market for fillets. The market for fillets is not expected to grow much as consumers prefer even more convenient ready meals.

Section II: Statistical Tables

Table 1: Total Edible Fishery Products, PS&D

Commodity	Total Edible Fishery Products				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Landings/Comm'l Catch	601110	579848	0	563350	0	556500
Fresh/Frz Production	228500	262895	0	260000	0	265000
Canned Production	3800	4000	0	4100	0	4100
Cured Production	23980	19874	0	20000	0	20250
Total Production	256280	286769	0	284100	0	289350
Fresh/Frozen Imports	356000	380094	0	380000	0	385000
Canned Imports	155000	154149	0	156000	0	157250
Cured Imports	14000	18477	0	18750	0	18500
TOTAL Imports	525000	552720	0	554750	0	560750
Fresh/Frozen Exports	280000	329159	0	317000	0	320000
Canned Exports	44000	20949	0	22000	0	23500
Cured Exports	16000	12601	0	13500	0	13500
TOTAL Exports	340000	362709	0	352500	0	357000
Domestic Consumption	442000	479580	0	488750	0	494100

Table 2: UK Wild Catch

Quantity (metric tonnes, liveweight)				
	1998	1999	2000	% Change
Cod	61029	39575	31495	-20
Dogfish	5295	4832	5315	10
Haddock	70757	61425	43320	-29
Hake	2177	3369	2969	-12
Halibut	177	246	200	-19
Lemon Sole	4457	4367	3823	-12
Redfish	1453	1557	1564	0
Sand eels	11595	6785	9654	42
Skate/rays	5985	4986	4838	-3
Sole	1913	1928	1710	-11
Monks/Anglers	14407	12072	11483	-5
Plaice	10768	8919	8021	-10
Saithe (coley)	8407	8682	8522	-2
Whiting	23465	22478	20616	-8
Other Demersal	28488	29483	28168	-4
Total Demersal	250373	210704	181698	-14
Herring	39585	45515	39275	-14
Mackerel	54127	41304	54614	32
Sprats	4950	14205	8328	-41
Other Pelagic	37677	43769	25593	-42
Total Pelagic	136339	144793	127810	-12
Cockles	12034	13122	20267	54
Crabs	22772	20461	22859	12
Lobsters	1382	1685	1081	-36
Nephrops	28609	31092	28236	-9
Other Shellfish	52095	44570	47638	7
Total Shellfish	116892	110930	120081	8
TOTAL	503604	466427	429589	-8
Source: Sea Fish Industry Authority				

Table 3: Retail Sector for Edible Fish

	1999			2000		
	Volume MT	Value (US$ million)		Volume MT	Value (US$ million)	
Total	205693	1071226		212224	1118979	
fresh/chilled	70925	434808		72226	460549	
defined chilled	14262	83191		16055	92394	
frozen	120506	553227		123943	566036	
BPS 1 = USD 1.51 2000 Exhange rate						
Source: Sea Fish Industry Authority						

Table 4: Total Edible Fishery Products, Import Matrix

Time period		Units:	MT
Imports for:	1999		2000
U.S.	18829	U.S.	17464
Others		Others	
Iceland	66846	Iceland	63253
Norway	66629	Norway	58979
Faroe Isl	30128	Denmark	41772
Russia	29808	Russia	33045
Denmark	26540	Faroe Isl	26086
Thailand	25897	Thailand	21430
Germany	17310	Germany	19930
Seychelles	16407	Ireland	16438
Ghana	16020	Ghana	13959
Philippines	11390	Spain	10123
Total for Others	306975		305015
Others not Listed	220135		230241
Grand Total	545939		552720

Table 5: Total Edible Fishery Products, Export Matrix

Time period		Units:	MT
Exports for:	1999		2000
U.S.	10427	U.S.	8977
Others		Others	
France	88046	France	92913
Germany	24923	Russia	34232
Spain	24518	Spain	28946
Russia	16448	Nigeria	26123
Egypt	13738	Germany	22734
Netherlands	11328	Netherlands	10249
Nigeria	10931	Egypt	8162
Japan	5857	Japan	4337
Latvia	3601	Latvia	4063
Philippines	2278		
Total for Others	201668		231759
Others not Listed	121760		121973
Grand Total	333855		362709

Table 6: Salmon & Salmon Products, PS&D

Commodity	Salmon, Whole/Eviscerated			(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	1200	1200	1200	1000	0	975
Total Production	139000	129959	142000	131500	0	132500
Intra-EC Imports	9000	8611	9500	9000	0	9500
Other Imports	14000	11971	16000	14000	0	15000
TOTAL Imports	23000	20582	25500	23000	0	24500
TOTAL SUPPLY	163200	151741	168700	155500	0	157975
Intra-EC Exports	38500	36130	35000	36000	0	38000
Other Exports	7500	8579	5500	8000	0	7000
TOTAL Exports	46000	44709	40500	44000	0	45000
Domestic Consumption	88500	76032	102200	80525	0	815000
Other Use/Loss	27500	30000	25000	30000	0	30500
TOTAL Utilization	116000	106032	127200	110525	0	112000
Ending Stocks	1200	1000	1000	975	0	975
TOTAL DISTRIBUTION	163200	151741	168700	155500	0	157975

Table 7: Salmon & Salmon Products, Prices Table

Prices in	pence	per uom	kilogram
Year	2000	2001	% Change
Jan	308	270	-12.34%
Feb	308	270	-12.34%
Mar	308	270	-12.34%
Apr	627	270	-56.94%
May	309	270	-12.62%
Jun	298	270	-9.40%
Jul	308	253	-17.86%
Aug	308	215	-30.19%
Sep	286	231	-19.23%
Oct	286		
Nov	286		
Dec	270		
Exchange Rate	0.66	Local currency/US $	
Date of Quote	avg 2000	MM/DD/YYYY	

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

Table 8: Salmon & Salmon Products, Import Matrix

Time period		Units:	MT
Imports for:	1999		2000
U.S.	1136	U.S.	1307
Others		Others	
Irish Rep	419	Irish Rep	2850
Norway	13159	Norway	5505
Sweden	3261	Sweden	5003
Faroe Isl	4538	Faroe Isl	2169
Chile	637	Chile	1002
Netherlands	30	Netherlands	758
Total for Others	22044		17287
Others not Listed	2084		1988
Grand Total	25264		20582

Table 9: Salmon & Salmon Products, Export Matrix

Time period		Units:	MT
Exports for:	1999		2000
U.S.	7158	U.S.	6511
Others		Others	
France	21423	France	18403
Germany	9036	Germany	10142
Spain	3311	Spain	3344
Belgium	2418	Belgium	1765
Ireland	1394	Ireland	1739
Japan	1010	Japan	963
Netherlands	357	Netherlands	737
Total for Others	38949		37093
Others not Listed	2462		1105
Grand Total	48569		44709

Table 10: Salmon Canned, PS&D

Commodity	Salmon, Canned				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	850	850	800	1000		1075
Total Production	0	0	0	0	0	0
Intra-EC Imports	160	253	175	200	0	225
Other Imports	22000	26798	23000	25500	0	26000
TOTAL Imports	22160	27051	23175	25700	0	26225
TOTAL SUPPLY	23010	27901	23975	26700		27300
Intra-EC Exports	800	1048	825	975	0	1000
Other Exports	100	147	100	100	0	125
TOTAL Exports	900	1195	925	1075	0	1125
Domestic Consumption	21310	25706	22225	25625	0	25275
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	21310	25706	22225	25625	0	25275
Ending Stocks	800	1000	825	1075	0	900
TOTAL DISTRIBUTION	23010	27901	23975	26700	0	27300

Table 11: Salmon Canned, Prices Table

Canned Salmon Landed Prices (BPS/MT)			
Country of Origin	1998	1999	2000
US	3367	3305	2789
Canada	4541	3970	2587
EU (1)	3546	2114	4168
(1) Intra EU shipments are not subject to customs tariffs,			
Source: Customs and Excise, Intrastat			

Table 12: Salmon Canned, Import Matrix

Time period		Units:	MT
Imports for:	1999		2000
U.S.	14425	U.S.	13392
Others		Others	
Canada	5844	Canada	11971
Chile	812	Chile	718
Korea	446	Korea	627
Netherlands	8	Netherlands	173
France	171	France	43
Norway	61	Norway	37
Denmark	12	Denmark	37
Thailand	55	Thailand	16
Russia	321	Russia	0
Total for Others	7730		13622
Others not Listed	47		37
Grand Total	22202		27051

Table 13: Salmon Canned, Export Matrix

Time period		Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
Irish Rep	903	Irish Rep	703
Netherlands	61	Netherlands	226
Korea	0	Korea	70
France	48	France	36
Spain	57	Spain	21
Belgium	0	Belgium	17
Germany	12	Germany	17
Denmark	7	Denmark	14
Greece	0	Greece	14
Cyprus	16	Cyprus	8
Total for Others	1104		1126
Others not Listed	117		69
Grand Total	1221		1195

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

	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	7500	7500	8000	7500	0	7250
Total Production	125000	102565	130000	101000	0	102500
Intra-EC Imports	25000	10108	22000	10500	0	11500
Other Imports	60000	52721	58000	59500	0	60500
TOTAL Imports	85000	62829	80000	70000	0	72000
TOTAL SUPPLY	217500	172894	218000	178500	0	181750
Intra-EC Exports	5000	7944	5500	7500	0	7600
Other Exports	2000	1966	2000	2000	0	2200
TOTAL Exports	7000	9910	7500	9500	0	9800
Domestic Consumption	9000	10000	9500	10250	0	10250
Other Use/Loss	193500	145484	193500	151500	0	154450
TOTAL Utilization	202500	155484	203000	161750	0	164700
Ending Stocks	8000	7500	7500	7250	0	7250
TOTAL DISTRIBUTION	217500	172894	218000	178500	0	181750

Table 15: Groundfish, Whole/Eviscerated, Prices Table

Prices in	pence	per uom	kilo
Year	2000	2001	% Change
Jan	396	440	11.11%
Feb	396	440	11.11%
Mar	440	440	0.00%
Apr	440	550	25.00%
May	396	418	5.56%
Jun	396	440	11.11%
Jul	396	440	11.11%
Aug	440	440	0.00%
Sep	462	484	4.76%
Oct	482		
Nov	440		
Dec	528		
Exchange Rate	0.66	Local currency/US $	
Date of Quote	avg 2000	MM/DD/YYYY	

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

Table 16: Groundfish, Whole/Eviscerated, Import Matrix

Time period		Units:	MT
Imports for:	1999		2000
U.S.	502	U.S.	604
Others		Others	
Russia	24460	Russia	21497
Iceland	14109	Iceland	14317
Faroe Island	9765	Faroe Island	7882
Norway	9325	Norway	7699
Denmark	5182	Denmark	5087
Irish Rep	3125	Irish Rep	3143
Spain	113	Spain	1232
Sweden	398	Sweden	646
Total for Others	66477		61503
Others not Listed	330		722
Grand Total	67309		62829

Table 17: Groundfish, Whole/Eviscerated, Export Matrix

Time period		Units:	MT
Exports for:	1999		2000
U.S.	99	U.S.	243
Others		Others	
France	3219	France	4365
Portugal	1198	Portugal	2220
Spain	345	spain	543
Ireland	425	Ireland	578
Canada	1017	Canada	435
China	379	China	358
Denmark	142	Denmark	220
Germany	533	Germany	18
Total for Others	7258		8737
Others not Listed	1714		930
Grand Total	9071		9910

Table 18: Groundfish Fillets, PS&D

	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	17000	17000	18000	16000	0	16500
Total Production	53000	45000	55000	44950	0	45000
Intra-EC Imports	25000	27675	27000	26000	0	25000
Other Imports	85000	90217	80000	92000	0	95000
TOTAL Imports	110000	117892	107000	118000	0	120000
TOTAL SUPPLY	180000	179892	180000	178950	0	181500
Intra-EC Exports	7000	4746	7250	5000	0	5400
Other Exports	1200	1497	1200	1200	0	1375
TOTAL Exports	8200	6243	8450	6200	0	6775
Domestic Consumption	153800	157649	153550	156250	0	157725
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	153800	157649	153550	156250	0	157725
Ending Stocks	18000	16000	18000	16500	0	17000
TOTAL DISTRIBUTION	180000	179892	180000	178950	0	181500

Table 19: Groundfish Fillets, PS&D

Prices in	pence	per uom	kilo
Year	2000	2001	% Change
Jan	440	545	23.86%
Feb	440	550	25.00%
Mar	517	550	6.38%
Apr	502	594	18.33%
May	502	440	-12.35%
Jun	455	484	6.37%
Jul	517	504	-2.51%
Aug	517	583	12.77%
Sep	572	572	0.00%
Oct	550		
Nov	506		
Dec	567		
Exchange Rate	0.66	Local currency/US $	
Date of Quote	avg 2000	MM/DD/YYYY	

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

Table 20: Groundfish Fillets, PS&D

Time period		Units:	MT
Imports for:	1999		2000
U.S.	437	U.S.	1278
Others		Others	
Iceland	24917	Iceland	23837
Norway	23989	Norway	23684
Denmark	8577	Denmark	18682
Russia	12411	Russia	17677
Faroe Isl	8753	Faroe Isl	8998
Germany	9117	Germany	8993
China	2832	China	6561
Total for Others	90596		108432
Others not Listed	7350		8182
Grand Total	98383		117892

Table 21: Groundfish Fillets, PS&D

Time period		Units:	MT
Exports for:	1999		2000
U.S.	130	U.S.	68
Others		Others	
France	3414	France	3219
Ireland	1271	Ireland	696
Germany	174	Germany	557
Belgium	170	Belgium	138
Spain	124	Spain	106
Norway	188	Norway	90
Portugal	271	Portugal	30
Total for Others	5612		4836
Others not Listed	1654		1339
Grand Total	7396		6243

Table 22: Retail Price Indices

Retail Price Indices					
January 1987 = 100		Current Prices			
	1998	1999	2000	2001	% change
Beef	128.5	131.8	132.1	135.0	2.2
Lamb	151.2	155.1	155.7	165.0	6.0
Pork	131.3	129.3	132.1	145.9	10.4
Bacon	147.3	150.4	154.6	177.6	14.9
Poultry Meat	111.9	112.6	109.6	113.2	3.3
Other Meat	133.3	132.3	132.5	139.6	5.4
Fish	133.4	146.9	150.7	153.6	1.9
Of which fresh	133.7	147.6	159.8	162.4	1.6
All food	143.5	144.2	143.4	151.5	5.6
All Items	163.4	165.6	171.1	174.4	1.9
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		1999(%)	2000 (%)	2001 (%)
Multiples		59.8	62.9	66.1
Fish Mongers		22.9	17.3	18.0
Market Stalls		4.1	4.0	2.4
Department stores		8.1	10.2	9.0
Mobile Fish Vans		2.1	1.7	1.5
Other		3.0	3.9	3.0
Frozen				
Top 5 Multiples (1)		55.0	56.9	53.2
Other Multiples		11.7	10.9	12.8
Freezer Centers		17.8	17.6	21.0
Department Stores		7.8	7.2	5.1
Coops		4.8	4.7	4.7
Other		2.9	2.7	3.2
(1) Safeway, Asda, Somerfield/Kwiksave, Sainsbury & Tesco				
Source: Sea Fish Industry Authority				