



**MARKET ACCESS SECRETARIAT  
Global Analysis Report**

# Competitive Trade Analysis

## Fresh, Frozen and Processed Fish in the United Kingdom

**August 2016**



### REPORT CONTENT SUMMARY

This report examines fish imports into the United Kingdom (U.K.), and particularly those coming from Canada.

The following data analysis will highlight opportunities for Canadian exporters seeking to enter the U.K. fish market, and identify international competitors, particularly within the U.K.'s top ten fish commodity imports from the world.

### U.K. MARKET SUMMARY

Demand for fish continues to increase as numerous campaigns unfold in the U.K. with the goal of increasing fish consumption by informing consumers of the many health benefits of eating fish as well as providing them with new and easy recipe ideas.

Although demand is on the rise, Canadian exports have declined in value and in volume since 2014. Salmon that is prepared or preserved continues to be the most popular fish commodity imported into the U.K. from Canada, worth C\$19.7 million, up 7.48% from 2014.

Consumers in the U.K. are increasingly concerned with sustainability and looking toward ecolabels to help with purchasing decisions.

While the U.K. is the ninth largest fish importer in the world, it is the sixth-ranked fish importer within the European Union, representing 9.8% of fish imports.

### CONTENTS

Report Content Summary.....	1
U.K. Market Summary .....	1
Market Characteristics.....	2
Canada's Performance.....	2
Trade Overview .....	3
Distribution .....	5
Retail Market .....	16
E-Commerce .....	18
Conclusion.....	18
For More Information.....	19
Resources .....	19



Visit our online library of public reports for more information on this and other markets.



## MARKET CHARACTERISTICS

In 2014, the U.K. was the fastest-growing economy among the G7 countries with a real gross domestic product (GDP) growth of 2.9%. The rate of growth has since decelerated to 2.2% in 2015. According to Euromonitor International, the country's growth can be attributed to a modest increase in household incomes, rising domestic demand, and lower oil prices.

Although fish consumption in the U.K. has historically been lower than the fish consumption of its European neighbours, fish emerged as the animal protein with the fastest sales growth for 2014, reaching a retail sales volume of 646,000 tonnes, a 4% annual increase over the previous year. Additionally, from 2009 to 2014, the volume of fish sold in the U.K. increased by 11.2%. The U.K. fish industry continues to grow, mainly because of the perceived health benefits. While the U.K. has its own fishing industry, most of the domestically caught fish and seafood is exported to other countries because British consumers favour a small range of species, such as salmon, that are frequently imported. The U.K. is the ninth largest importer of fish, representing 3.9% of the world's fish imports in 2015. Within the European Union, the U.K. ranked sixth, representing 9.8% of fish imports.

According to Sainsbury's Future Foundation, obstacles to fish consumption in the U.K. include price, recipe knowledge, the availability of fresh fish at local supermarkets, and the time required to prepare fish. However, with the help of campaigns aimed at developing and sharing new recipes, it is expected that fresh fish consumption will continue to increase throughout the forecast period (2016-2020). Although fresh fish is more expensive than frozen, consumers consider its better taste and perceived added health benefits to be worth the extra cost.

Consumers in the U.K. are also increasingly concerned with sustainability. The Marine Stewardship Council published the results of a survey in 2015 in which 71% of U.K. respondents indicated that supermarkets should sell sustainably-caught fish and seafood, and 61% of U.K. respondents indicated that they trust ecolabels to help with their purchasing decisions. The British Retail Consortium, the Environmental Justice Foundation, and the World Wildlife Foundation have launched new guidance information on how to keep illegal fish out of the supply chain. They have also warned U.K. retailers and distributors to pay greater attention to their fish supply.

## CANADA'S PERFORMANCE

The U.K. is relatively minor market for Canadian fish exporters. In 2015, Canada exported C\$1.90 billion in live, fresh, frozen, and processed fish. Canada's four largest export markets for fish were the United States (71%), followed by China (6%), Japan (5%), and the U.K. (2%).

According to Global Trade Atlas data, the total volume of Canadian fish exports into the U.K. dropped 16.03% from 2014 to 2015, and the total value of Canadian fish exports into the U.K. dropped 7.63% over the same period. Leading Canadian fish products (not including general categories, such as "frozen fish") were: prepared or preserved salmon (C\$19.7 million, up 7.48%); frozen cod fillets (C\$4.7 million, down 24.71%); frozen fish of Bregmacerotidae families (C\$1.5 million, up 19.46%); frozen Pacific, Atlantic and Danube salmon fillets (C\$0.79 million, down 84.72%); and frozen fish livers and roes (C\$0.67 million, up 15.01%).



**The U.K.'s Top Ten Fish Commodity Imports from Canada, in C\$ and Tonnes  
2013-2015**

HS Code	Description	2013		2014		2015	
		C\$	Tonnes	C\$	Tonnes	C\$	Tonnes
<b>Total Fish</b>		<b>30,639,575</b>	<b>3,161</b>	<b>33,948,582</b>	<b>3,806</b>	<b>31,357,444</b>	<b>3,196</b>
160411	Salmon, Prepared or Preserved, Whole or Pieces	22,825,157	1,867	18,339,475	1,695	19,710,715	1,521
030471	Cod Fillets, Frozen	2,335,651	326	6,200,347	851	4,668,472	598
030389	Frozen fish	1,351,499	82	1,311,166	69	2,395,957	99
030495	Fish of Families Bregmacerotidae (such as codlets), Frozen	1,128,807	447	1,271,742	514	1,519,240	583
030481	Pacific, Atlantic and Danube Salmon Fillets, Frozen	1,649,982	155	5,186,994	411	792,345	72
030390	Fish Livers and Roes, Frozen	613,965	149	580,319	146	667,401	157
030311	Sockeye Salmon, Frozen	0	0	7,336	1	403,039	57
030381	Dogfish and Other Sharks, Frozen	0	104	0	21	350,192	47
030541	Pacific, Atlantic and Danube Salmon, Smoked	536,748	0	150,897	0	346,828	9
030472	Haddock Fillets, Frozen	17,144	4	623,344	80	187,771	22

Source: Global Trade Atlas, 2016.

## TRADE OVERVIEW

The U.K. imported a total of 0.55 million tonnes of fish in 2015, a 5.95% decline from 2014. The country's fish imports were worth approximately C\$3.59 billion, a 7.5% increase from 2014. Over the past three years, Iceland has remained the top supplier for the U.K.'s fish imports, representing C\$472.2 million and 55.4 thousand tonnes in 2015. China is the second largest supplier of fish imports with C\$296.9 million (55.2 thousand tonnes).

Canada represented the U.K.'s twenty-seventh largest supplier of fish imports, accounting for about 0.87% of total fish imports in value and volume. Although U.K. fish imports from Canada decreased 16.03% in volume from 2014 to 2015, value increased by 2.34%.



### The U.K.'s Top Ten Suppliers of Fish, Value in C\$ and % Share

Rank	Partner Country	Canadian Dollars			% Share			% Change 2014/2015
		2013	2014	2015	2013	2014	2015	
	<b>World</b>	<b>3,339,551,278</b>	<b>3,507,727,570</b>	<b>3,589,939,327</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>7.50</b>
1	Iceland	382,470,975	422,302,177	472,227,994	11.45	12.04	13.15	23.47
2	China	235,525,274	293,370,194	296,880,482	7.05	8.36	8.27	26.05
3	Germany	263,987,430	280,038,642	295,959,145	7.90	7.98	8.24	12.11
4	Faroe Island	339,141,091	347,452,911	290,365,344	10.16	9.91	8.09	-14.38
5	Sweden	170,821,393	193,436,284	198,511,550	5.12	5.51	5.53	16.21
6	Denmark	196,905,458	187,115,348	176,011,296	5.90	5.33	4.90	-10.61
7	Norway	104,818,839	149,510,838	144,616,371	3.14	4.26	4.03	37.97
8	United States	116,542,175	153,245,732	143,116,920	3.49	4.37	3.99	22.80
9	Netherlands	114,934,851	119,689,266	125,579,230	3.44	3.41	3.50	9.26
10	Russia	93,134,636	82,823,340	118,414,571	2.79	2.36	3.30	27.14
27	Canada	30,639,575	33,948,582	31,357,444	0.92	0.97	0.87	2.34

Source: Global Trade Atlas, 2016.

### The U.K.'s Top Ten Suppliers of Fish, Volume in Tonnes and % Share

Rank	Partner Country	Quantity			% Share			% Change 2014/2015
		2013	2014	2015	2013	2014	2015	
	<b>World</b>	<b>614,489</b>	<b>585,864</b>	<b>551,009</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>-5.95</b>
1	Iceland	59,265	53,921	55,391	9.64	9.20	10.05	2.73
2	China	57,793	65,806	55,162	9.41	11.23	10.01	-16.17
3	Germany	54,334	46,213	48,303	8.84	7.89	8.77	4.52
4	Faroe Islands	47,348	44,007	35,599	7.71	7.51	6.46	-19.11
5	Denmark	44,501	38,813	30,093	7.24	6.62	5.46	-22.47
6	Norway	29,327	35,407	26,631	4.77	6.04	4.83	-24.79
7	Sweden	25,176	25,431	26,298	4.10	4.34	4.77	3.41
8	Mauritius	24,237	21,248	21,003	3.94	3.63	3.81	-1.15
9	United States	17,918	22,611	19,306	2.92	3.86	3.50	-14.62
10	Russia	19,686	14,514	18,353	3.20	2.48	3.33	26.45
27	Canada	3,161	3,806	3,196	0.51	0.65	0.58	-16.03

Source: Global Trade Atlas, 2016.

### Fish Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-15
U.K. imports from the world	3,339,551,278	3,507,727,570	3,589,939,327	3.68
U.K. imports from Canada	30,639,575	33,948,582	31,357,444	1.16
Supply gap	3,308,911,703	3,473,778,988	3,558,581,883	3.70

Source: Global Trade Atlas, 2016.

\*CAGR: compound annual growth rate



## DISTRIBUTION

Immingham, Felixstowe, and Liverpool are the three largest ports for Canadian fish entering the U.K.

The Port of Immingham is situated on the East coast of Northern England. It sits on the South bank of the Humber Estuary, offering easy access to the Humber region, which supports a range of industries and sectors, including food processing.

The Port of Felixstowe is located on the East coast of England. Felixstowe's connectivity offers access to all major roads North and South, making it a central hub and main distribution centre.

The Port of Liverpool is located on the West coast of Northern England and sits on both banks of the River Mersey.

### U.K. Fish Products from the World by Entry Ports C\$ and % share

Port	Canadian Dollars			% Share			% Change 14/15
	2013	2014	2015	2013	2014	2015	
All Ports	2,205,103,945	2,352,837,024	2,392,755,573	100	100	100	1.7
Immingham	689,470,260	745,905,542	778,426,715	31.27	31.7	32.53	4.36
Felixstowe	637,926,875	652,990,433	684,289,875	28.93	27.75	28.6	4.79
Liverpool	214,126,224	204,851,950	251,187,596	9.71	8.71	10.5	22.62
Grimsby	144,194,001	154,927,536	191,844,699	6.54	6.58	8.02	23.83
Inverness (Inc. Wick)	97,731,713	108,659,723	107,098,226	4.43	4.62	4.48	-1.44
Southampton	90,632,043	170,504,537	100,565,997	4.11	7.25	4.2	-41.02
London Heathrow	72,432,417	72,580,257	66,225,464	3.28	3.08	2.77	-8.76
Pseudo Inland Clearance Code	12,331,857	25,043,793	41,028,977	0.56	1.06	1.71	63.83
London (Inc. Tilbury)	36,875,158	41,649,678	40,694,999	1.67	1.77	1.7	-2.29
London Gateway	0	12,545,863	31,308,522	0	0.53	1.31	149.55

Source: Global Trade Atlas, 2016.



**The U.K.'s Top Twenty Fish Commodity Imports from the World  
C\$ Millions and % Share 2013-2015**

HS Code	Description	C\$ Millions			% Share			% Change 2014/2015
		2013	2014	2015	2013	2014	2015	
<b>Total</b>		<b>3,339.6</b>	<b>3,507.7</b>	<b>3,589.9</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>7.5</b>
160414	Tunas/Skipjack/Bonito Prep/Pres Not Minced	652.2	600.5	628.0	19.5	17.1	17.5	-3.7
030471	Frozen Cod Fillets	428.3	471.1	554.8	12.8	13.4	15.5	29.5
030214	Fresh/Chilled Atlantic Salmon and Danube Salmon	397.5	427.1	381.2	11.9	12.2	10.6	-4.1
160419	Prepared or Preserved Whole Fish or Pieces	217.4	235.2	217.1	6.5	6.7	6.1	-0.1
030444	Fresh/Chilled Fish Fillets Fam Bregmacerotidae	152.6	169.7	165.4	4.6	4.8	4.6	8.3
030472	Frozen Haddock Fillets	126.1	117.1	131.7	3.8	3.3	3.7	4.4
160411	Prepared or Preserved Whole Salmon or Pieces	113.1	136.1	126.2	3.4	3.9	3.5	11.6
030481	Frozen Pacific, Atlantic and Danube Salmon Fillets	68.0	100.8	99.4	2.0	2.9	2.8	46.2
030475	Frozen Alaska Pollock Fillets	104.5	109.8	84.7	3.1	3.1	2.4	-18.9
030389	Frozen Fish	62.4	78.8	74.0	1.9	2.3	2.1	18.6
030441	Fresh/Chilled Pacific, Atlantic, Danube Salmon Fillets	42.8	58.2	69.3	1.3	1.7	1.9	62.0
030363	Frozen Cod	22.4	50.2	68.3	0.7	1.4	1.9	204.8
160420	Prepared or Preserved Fish	91.5	71.8	66.3	2.7	2.1	1.9	-27.5
030252	Fresh/Chilled Haddock	49.6	47.3	60.0	1.5	1.4	1.7	20.9
160413	Sardines/Sardinella/Brisling Prep/Pres, Not Minced	58.8	61.0	59.4	1.8	1.7	1.7	1.1
030462	Frozen Catfish Fillets	37.0	42.5	53.8	1.1	1.2	1.5	45.4
160415	Prepared or Preserved Mackerel, Not Minced	47.9	50.1	52.3	1.4	1.4	1.5	9.2
030541	Smoked Pacific, Atlantic and Danube Salmon	32.1	47.5	52.0	1.0	1.4	1.5	62.1
030284	Fresh/Chilled Seabass	54.6	46.0	49.6	1.6	1.3	1.4	-9.1
030449	Fresh/Chilled Fish Fillets	31.5	46.1	49.5	0.9	1.3	1.4	57.2

Source: Global Trade Atlas, 2016.



## 1. Tunas/Skipjack/Bonito Prepared/Preserved, Not Minced

### The U.K.'s Top Suppliers of Prepared or Preserved Tuna/Skipjack/Bonito, in C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>652,187,083</b>	<b>600,500,617</b>	<b>628,012,684</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>-3.71</b>
Ghana	76,687,885	75,440,220	112,941,911	11.76	12.56	17.98	47.27
Seychelles	113,707,372	113,518,304	111,474,256	17.43	18.90	17.75	-1.96
Mauritius	133,024,550	108,775,948	106,328,819	20.40	18.11	16.93	-20.07
Thailand	82,058,057	56,383,431	60,931,274	12.58	9.39	9.70	-25.75
Spain	54,549,739	41,254,632	49,720,288	8.36	6.87	7.92	-8.85
Philippines	43,888,201	44,285,057	37,133,457	6.73	7.37	5.91	-15.39
Ecuador	43,297,809	45,077,756	36,959,551	6.64	7.51	5.89	-14.64
Indonesia	34,910,751	37,115,100	31,805,450	5.35	6.18	5.06	-8.89
France	19,419,265	15,518,899	19,642,393	2.98	2.58	3.13	1.15
Portugal	7,545,426	14,262,509	14,902,710	1.16	2.38	2.37	97.51

Source: Global Trade Atlas, 2016.

### Prepared/Preserved Tuna/Skipjack/Bonito Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	652,187,083	600,500,617	628,012,684	-0.02
U.K. imports from Canada	-	-	-	0.00
Supply gap	652,187,083	600,500,617	628,012,684	-0.02

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate



## 2. Frozen Cod Fillets

### The U.K.'s Top Suppliers of Frozen Cod Fillets, C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>428,271,875</b>	<b>471,112,485</b>	<b>554,745,958</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>29.53</b>
Iceland	108,200,712	138,699,884	159,052,921	25.26	29.44	28.67	47.00
China	99,473,535	119,117,059	140,692,040	23.23	25.28	25.36	41.44
Russia	55,522,614	49,193,756	68,757,171	12.96	10.44	12.39	23.84
Germany	36,534,656	41,708,140	54,718,881	8.53	8.85	9.86	49.77
Faroe Islands	30,451,028	29,927,255	45,463,617	7.11	6.35	8.20	49.30
Norway	30,567,479	38,053,841	33,624,402	7.14	8.08	6.06	10.00
Denmark	33,007,729	22,260,093	17,196,371	7.71	4.73	3.10	-47.90
Poland	15,822,363	13,304,237	14,939,034	3.69	2.82	2.69	-5.58
Vietnam	179,363	2,123,628	4,730,940	0.04	0.45	0.85	2537.63
Canada	2,335,651	6,200,347	4,668,472	0.55	1.32	0.84	99.88

Source: Global Trade Atlas, 2016.

### Frozen Cod Fillets Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	428,271,875	471,112,485	554,745,958	13.81
U.K. imports from Canada	2,335,651	6,200,347	4,668,472	41.38
Supply gap	425,936,224	464,912,138	550,077,486	13.64

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate





### 3. Fresh/Chilled Atlantic Salmon and Danube Salmon

#### The U.K.'s Top Suppliers of Fresh/Chilled Atlantic Salmon and Danube Salmon, C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>397,482,781</b>	<b>427,063,037</b>	<b>381,165,413</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 10.75</b>
Faroe Island	269,239,933	262,675,011	191,887,948	67.74	61.51	50.34	- 26.95
Sweden	107,984,411	126,464,183	133,758,867	27.17	29.61	35.09	5.77
Denmark	5,982,807	19,408,599	29,875,945	1.51	4.54	7.84	53.93
Norway	7,284,798	7,757,023	8,590,094	1.83	1.82	2.25	10.74
Germany	2,087,300	6,712,632	6,689,597	0.53	1.57	1.76	- 0.34
France	83,907	506,968	6,300,131	0.02	0.12	1.65	1142.71
Ireland	2,457,994	614,165	1,745,828	0.62	0.14	0.46	184.26
Iceland	612,049	2,083,362	1,675,252	0.15	0.49	0.44	- 19.59
Netherlands	1,532,449	841,094	641,751	0.39	0.20	0.17	- 23.70
Greece	33,448	0	0	0.01	0.00	0.00	0.00

Source: Global Trade Atlas, 2016.

#### Fresh/Chilled Atlantic Salmon and Danube Salmon Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	397,482,781	427,063,037	381,165,413	-2.07
U.K. imports from Canada	-	-	-	0.00
Supply gap	397,482,781	427,063,037	381,165,413	-2.07

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate



#### 4. Fresh/Chilled Fish Fillets Families Bregmacerotidae (Codlets)

The U.K.'s Top Suppliers of Fresh/Chilled Fish Fillets Families Bregmacerotidae, C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>152,642,319</b>	<b>169,675,331</b>	<b>165,384,790</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 2.53</b>
Iceland	137,553,785	151,750,431	150,463,766	90.12	89.44	90.98	- 0.85
Lithuania	2,669,961	4,638,974	7,083,401	1.75	2.73	4.28	52.69
Denmark	404,403	2,670,500	3,073,383	0.26	1.57	1.86	15.09
Sweden	232,201	1,059,805	1,486,314	0.15	0.62	0.90	40.24
Faroe Island	3,386,058	4,497,409	1,326,100	2.22	2.65	0.80	- 70.51
Ireland	698,998	933,226	1,037,433	0.46	0.55	0.63	11.17
Germany	154,973	397,773	861,071	0.10	0.23	0.52	116.47
Belgium	0	0	22,499	0.00	0.00	0.01	0.00
Spain	29,923	23,344	13,331	0.02	0.01	0.01	- 42.89
Netherlands	7,270	847,209	10,457	0.00	0.50	0.01	- 98.77

Source: Global Trade Atlas, 2016.

#### Fresh/Chilled Fish Fillets Families Bregmacerotidae Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	152,642,319	169,675,331	165,384,790	-2.53
U.K. imports from Canada	-	-	-	0.00
Supply gap	152,642,319	169,675,331	165,384,790	-2.53

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate



## 5. Frozen Haddock Fillets

### The U.K.'s Top Suppliers of Frozen Haddock Fillets, C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>126,117,472</b>	<b>117,122,055</b>	<b>131,721,626</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>12.47</b>
Iceland	36,632,841	37,055,105	44,802,192	29.05	31.64	34.01	20.91
China	27,898,648	29,556,072	33,458,325	22.12	25.24	25.40	13.20
Russia	20,891,969	18,594,679	22,068,990	16.57	15.88	16.75	18.68
Norway	15,413,922	13,091,825	16,007,196	12.22	11.18	12.15	22.27
Faroe Islands	2,398,431	3,865,058	4,457,200	1.90	3.30	3.38	15.32
Poland	9,524,876	6,247,914	4,222,800	7.55	5.33	3.21	- 32.41
Germany	2,152,315	3,181,591	3,457,747	1.71	2.72	2.63	8.68
Denmark	8,659,932	3,046,691	2,134,882	6.87	2.60	1.62	- 29.93
Netherlands	382,486	162,581	483,557	0.30	0.14	0.37	197.43
Greenland	1,449,043	690,532	289,797	1.15	0.59	0.22	- 58.03

Source: Global Trade Atlas, 2016.

### Frozen Haddock Fillets Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	126,117,472	117,122,055	131,721,626	2.20
U.K. imports from Canada	17,144	623,344	187,771	230.95
Supply gap	126,100,328	116,498,711	131,533,855	2.13

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate



## 6. Prepared or Preserved Whole Salmon or Pieces

### The U.K.'s Top Suppliers of Prepared or Preserved Whole Salmon or Pieces, C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>113,075,416</b>	<b>136,135,321</b>	<b>126,153,478</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 7.33</b>
United States	78,899,625	93,504,969	83,980,255	69.78	68.69	66.57	- 10.19
Canada	22,825,157	18,339,475	19,710,715	20.19	13.47	15.62	7.48
Germany	4,080,345	11,181,487	8,265,780	3.61	8.21	6.55	- 26.08
Poland	1,252,439	8,260,094	8,010,977	1.11	6.07	6.35	- 3.02
Portugal	885,812	1,730,975	1,853,216	0.78	1.27	1.47	7.06
Thailand	1,304,185	762,141	1,476,067	1.15	0.56	1.17	93.67
Sweden	703,054	858,332	844,195	0.62	0.63	0.67	- 1.65
China	490,006	210,155	758,945	0.43	0.15	0.60	261.14
Ireland	1,323,628	898,979	613,234	1.17	0.66	0.49	- 31.79
France	119,892	176,098	403,075	0.11	0.13	0.32	128.89

Source: Global Trade Atlas, 2016.

### Prepared or Preserved Whole Salmon or Pieces Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	113,075,416	136,135,321	126,153,478	5.62
U.K. imports from Canada	22,825,157	18,339,475	19,710,715	-7.07
Supply gap	90,250,259	117,795,846	106,442,763	8.60

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate



## 7. Frozen Pacific, Atlantic and Danube Salmon Fillets

### The U.K.'s Top Suppliers of Frozen Pacific, Atlantic and Danube Salmon Fillets, C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>67,978,321</b>	<b>100,789,202</b>	<b>99,384,769</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 1.39</b>
China	15,584,471	29,050,565	31,309,784	22.93	28.82	31.50	7.78
United States	8,029,200	16,829,590	16,495,199	11.81	16.70	16.60	- 1.99
Poland	10,110,507	9,685,903	10,399,753	14.87	9.61	10.46	7.37
Chile	4,597,386	9,910,810	10,077,623	6.76	9.83	10.14	1.68
Germany	13,066,768	9,264,329	8,602,008	19.22	9.19	8.66	- 7.15
Faroe Islands	5,679,713	8,277,928	7,055,345	8.36	8.21	7.10	- 14.77
Denmark	946,331	987,027	3,555,331	1.39	0.98	3.58	260.21
Sweden	1,054,713	2,231,444	3,493,476	1.55	2.21	3.52	56.56
Norway	2,016,449	2,676,310	3,008,089	2.97	2.66	3.03	12.40
Belgium	255,098	4,047,090	2,333,663	0.38	4.02	2.35	- 42.34

Source: Global Trade Atlas, 2016.

### Frozen Pacific, Atlantic and Danube Salmon Fillets Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	67,978,321	100,789,202	99,384,769	20.91
U.K. imports from Canada	1,649,982	5,186,994	792,345	-30.70%
Supply gap	66,328,339	95,602,208	98,592,424	21.92%

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate



## 8. Frozen Alaska Pollock Fillets

### The U.K.'s Top Suppliers of Frozen Alaska Pollock Fillets, C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>104,527,867</b>	<b>109,807,973</b>	<b>84,723,189</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 22.84</b>
China	51,500,032	63,632,106	49,746,800	49.27	57.95	58.72	- 21.82
United States	11,984,208	18,016,673	16,623,836	11.47	16.41	19.62	- 7.73
Poland	4,676,766	5,780,664	5,735,766	4.47	5.26	6.77	- 0.78
Czech Republic	2,932,323	5,898,226	3,697,211	2.81	5.37	4.36	- 37.32
Germany	22,249,946	7,899,294	3,696,861	21.29	7.19	4.36	- 53.20
Russia	9,887,709	6,417,532	3,568,582	9.46	5.84	4.21	- 44.39
Netherlands	1,168,541	1,390,335	655,751	1.12	1.27	0.77	- 52.84
Denmark	74,285	595,431	597,334	0.07	0.54	0.71	0.32
Indonesia	0	81,037	207,831	0.00	0.07	0.25	156.47
Vietnam	0	0	189,149	0.00	0.00	0.22	0.00

Source: Global Trade Atlas, 2016.

### Frozen Alaska Pollock Fillets Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	104,527,867	109,807,973	84,723,189	-9.97
U.K. imports from Canada	-	-	-	0.00
Supply gap	104,527,867	109,807,973	84,723,189	-9.97

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate



## 9. Fresh/Chilled Pacific, Atlantic, Danube Salmon Fillets

### The U.K.'s Top Suppliers of Fresh/Chilled Pacific, Atlantic, Danube Salmon Fillets, C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>42,792,681</b>	<b>58,151,379</b>	<b>69,306,029</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>19.18</b>
Sweden	29,606,788	36,773,235	33,184,041	69.19	63.24	47.88	- 9.76
Germany	737,671	3,878,012	9,534,906	1.72	6.67	13.76	145.87
Denmark	5,236,479	5,682,462	7,973,045	12.24	9.77	11.50	40.31
Faroe Islands	281,173	5,163,627	6,598,242	0.66	8.88	9.52	27.78
Poland	1,671	0	5,324,451	0.00	0.00	7.68	0.00
Netherlands	0	1,870,681	2,617,044	0.00	3.22	3.78	39.90
France	5,727	0	2,036,595	0.01	0.00	2.94	0.00
Ireland	439,822	869,136	1,391,842	1.03	1.49	2.01	60.14
Lithuania	839,928	41,917	335,210	1.96	0.07	0.48	699.69
United States	193,339	214,404	247,657	0.45	0.37	0.36	15.51

Source: Global Trade Atlas, 2016.

### Fresh/Chilled Pacific, Atlantic, Danube Salmon Fillets Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	42,792,681	58,151,379	69,306,029	27.26
U.K. imports from Canada	-	-	-	0.00
Supply gap	42,792,681	58,151,379	69,306,029	27.26

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate



## 10. Frozen Cod, Not in Fillets

### The U.K.'s Top Suppliers of Frozen Cod, Not in Fillets, C\$ and % Share

Partner Country	Canadian Dollars			% Share			% Change 2014/2015
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>22,405,864</b>	<b>50,174,695</b>	<b>68,288,579</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>36.10</b>
Norway	14,593,965	35,117,601	40,450,384	65.13	69.99	59.23	15.19
Russia	2,249,215	6,490,357	16,966,424	10.04	12.94	24.85	161.41
Faroe Islands	1,097,704	2,864,011	7,991,444	4.90	5.71	11.70	179.03
Germany	280,466	379,463	1,089,491	1.25	0.76	1.60	187.11
Netherlands	608,905	675,162	754,150	2.72	1.35	1.10	11.70
Estonia	0	0	339,770	0.00	0.00	0.50	0.00
Denmark	2,315,022	1,699,737	259,555	10.33	3.39	0.38	- 84.73
Ireland	179,092	163,098	178,623	0.80	0.33	0.26	9.52
Portugal	370,421	188,513	158,437	1.65	0.38	0.23	- 15.95
France	0	128,210	94,525	0.00	0.26	0.14	- 26.27

Source: Global Trade Atlas, 2016.

### Frozen Cod, Not in Fillets Supply Gap, in C\$

	2013	2014	2015	*CAGR % 2013-2015
U.K. imports from the world	22,405,864	50,174,695	68,288,579	74.58
U.K. imports from Canada	-	-	-	0.00
Supply gap	22,405,864	50,174,695	68,288,579	74.58

Source: Global Trade Atlas, 2016.

CAGR: compound annual growth rate

## RETAIL MARKET

**Fresh fish:** Includes all fresh and uncooked freshwater and marine fish, whether sold packaged or unpackaged, cut or whole. Also includes unpackaged fish products that have undergone further processing, e.g. smoked salmon sold from fish/seafood counters in retail outlets.

\*All packaged/processed fish products, such as canned fish; chilled/frozen processed products, such as fish fingers, are excluded.

### Historic Retail Sales of Fresh Fish in the U.K. US\$ Millions, Current Prices, Fixed Exchange Rate

	2011	2012	2013	2014	2015	% *CAGR 2011-15	2011-15 %
<b>Volume – '000 tonnes</b>	592.3	606.5	624.1	645.4	664.5	2.9	72.2
<b>Value</b>	7,022.5	7,566.6	8,039.3	8,570.3	8,988.0	6.36	27.99

Source: Euromonitor International, 2016.

CAGR: compound annual growth rate





**Forecasted Retail Sales of Fresh Fish in the U.K.  
US\$ Millions, Current Prices, Fixed Exchange Rate**

	2016F	2017F	2018F	2019F	2020F	% *CAGR 2016-20	2016-20 %
<b>Volume – '000 tonnes</b>	675.1	684.8	693.0	699.7	703.7	1.0	28.6
<b>Fish</b>	9,316.7	9,677.1	10,010.7	10,342.3	10,632.6	3.36	14.12

Source: Euromonitor International, 2016.

CAGR: compound annual growth rate

**The U.K. – Fresh Fish: Historic Retail Market Segmentation by Value (US\$),  
Expenditure per Capita (US\$), Unit Price (US\$/kg) and % Growth**

	Units	2011	2012	2013	2014	2015
Expenditure per capita	US\$	111.4	119.2	125.8	133.3	138.9
Unit prices	US\$/kg	20.0	20.9	21.5	22.1	22.4
Consumption per capita	Kg	5.6	5.7	5.8	6.0	6.2
Value growth	%	5.1	7.7	6.2	6.6	4.9

Source: Euromonitor International, 2016.

**The U.K. – Fresh Fish: Forecast Retail Market Segmentation by Value (US\$),  
Expenditure per Capita (US\$), Unit Price (US\$/kg) and % Growth**

	Units	2016 <sup>F</sup>	2017 <sup>F</sup>	2018 <sup>F</sup>	2019 <sup>F</sup>	2020 <sup>F</sup>
Expenditure per capita	US\$	143.1	147.7	151.9	156.0	159.5
Unit prices	US\$/kg	22.8	23.2	23.7	24.2	24.7
Consumption per capita	Kg	6.3	6.4	6.4	6.5	6.5
Value growth	%	3.7	3.9	3.4	3.3	2.8

Source: Euromonitor International, 2016.

**U.K. Processed Fish: Retail Market Segmentation by Volume (Million, Tonnes)**

Segment	2010	2011	2012	2013	2014	*CAGR % 2010-15
<b>Total</b>	<b>307.5</b>	<b>296.5</b>	<b>297.8</b>	<b>284.4</b>	<b>271.5</b>	<b>-3.06</b>
Frozen	136.0	137.0	134.0	126.0	115.0	-4.11
Shelf Stable	102.0	97.0	92.0	85.0	83.0	-5.02
Chilled	69.5	62.5	71.8	73.4	73.5	1.41

Source: Mintel, 2016.

CAGR: compound annual growth rate



### U.K. Processed Fish: Company Retail Market Share by Volume (%)

Market Player	2013	2014
Own label	58.6	57.9
Iglo Foods Group	10.5	10.3
Findus Group	9.4	9.2
Princes Limited	8.3	8.5
John West Foods	7.6	8.5
Others	5.5	5.6

Source: Mintel, 2016.

### U.K. Processed Fish: Company Retail Market Share by Value (%)

Market Player	2013	2014
Own label	62.8	64.1
John West Foods	7.7	8.0
Iglo Foods Group	8.3	7.8
Findus Group	7.1	6.8
Princes Limited	7.1	6.5
Others	7.0	6.9

Source: Mintel, 2016.

## E-COMMERCE

Consistent with global trends, consumers in the U.K. are increasingly using the Internet and its various e-commerce platforms to purchase products, including food. As technology becomes more accessible to the general population, producers and processor should consider how they can better use it in business to reach new clients.

### U.K. Technology Penetration: Methods of Accessing the Internet in %

100 People	2012	2013	2014	2015	2016 <sup>F</sup>
Mobile subscriptions	139	142	145	148	152
Internet users	93	94	94	94	93
Broadband subscriber lines	35	36	36	37	37
Personal computers	84	88	92	97	101

Source: Planet Retail, 2016.

Note: Not exclusive to fish and seafood products

## CONCLUSION

Canada is represented in five of the U.K.'s top ten fish commodity import groups. Of these five fish commodity groups, the following three had the largest supply gaps in 2015: frozen cod fillets, frozen haddock fillets, and prepared/preserved salmon. This represents an opportunity for Canadian producers to increase exports to the U.K. of these commodities.

The frozen cod fillets category had the largest supply gap, representing C\$550 million. Canada's three top competitors for this sector as well as for the frozen haddock fillets sector include Iceland, China, and Russia. Canada is the U.K.'s second largest supplier of prepared or preserved salmon (whole or pieces), following the United States. The supply gap for prepared or preserved salmon in 2015 was C\$106 million.



Sustainability is a key factor for the fish industry in the U.K., representing an opportunity for products with ecolabels. Consumer preference for fresh fish over frozen also indicates increased opportunity for producers selling fresh/chilled fish.

## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in the United Kingdom**  
[www.tradecommissioner.gc.ca/uk](http://www.tradecommissioner.gc.ca/uk)
- **Find a Trade Commissioner**  
[www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp](http://www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp)

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- [ats-sea.agr.gc.ca](http://ats-sea.agr.gc.ca)

For additional information on Seafood Expo Global 2016, please contact:

- **Ben Berry, Deputy Director**  
Trade Show Strategy and Delivery  
Agriculture and Agri-Food Canada  
[ben.berry@agr.gc.ca](mailto:ben.berry@agr.gc.ca)

## RESOURCES

Euromonitor International, 2015. *Fish and Seafood in the United Kingdom*.

Euromonitor International, 2015. *UK Finally Overcomes its Fish Phobia*.

Euromonitor International, 2015. *United Kingdom: Country Profile*.

Global Trade Atlas Database, 2016.

Global Trade Tracker Database, 2016.

Planet Retail Database, 2015. *Processed Fish – UK*.



## COMPETITIVE TRADE ANALYSIS – FRESH, FROZEN, AND PROCESSED FISH IN THE UNITED KINGDOM

*Global Analysis Report*

Prepared by: Julie Acheson, Market Analyst

© Her Majesty the Queen in Right of Canada,  
represented by the Minister of Agriculture and Agri-Food (2016).

### Photo Credits

All photographs reproduced in this publication are used by permission of the rights holders. All images, unless otherwise noted, are copyright Her Majesty the Queen in Right of Canada.

To join our distribution list or to suggest additional report topics or markets, please contact:  
Agriculture and Agri-Food Canada, Global Analysis  
1341 Baseline Road, Tower 5, 3<sup>rd</sup> floor  
Ottawa, ON  
Canada, K1A 0C5  
E-mail: [MAS-SAM@agr.gc.ca](mailto:MAS-SAM@agr.gc.ca)

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada (AAFC) assumes no liability for any actions taken based on the information contained herein.

Reproduction or redistribution of this document, in whole or in part, must include acknowledgement of Agriculture and Agri-Food Canada as the owner of the copyright in the document, through a reference citing AAFC, the title of the document and the year. Where the reproduction or redistribution includes data from this document, it must also include an acknowledgement of the specific data source(s), as noted in this document.

Agriculture and Agri-Food Canada provides this document and other report services to agriculture and food industry clients free of charge.

### STAY CONNECTED

