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United Kingdom
Fishery Products
Annual Report
2005

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Report Highlights:
Fish and fishery product sales remain buoyant in the UK, with chilled seafood demand driving category growth. UK commercial catch increased in CY2004 after a decade in decline. However, the UK remains reliant on imports to meet consumers' need for seafood, especially for whitefish. The U.S. remains a key supplier of canned salmon to the UK, although Alaska Pollack and scallops are increasingly prominent in U.S. shipments to the UK.

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

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Executive Summary

The UK is a major consumer of seafood. Total spend on fish and fishery products by consumers at the retail level was estimated at BPS 1.82 billion (approximately US $3.37 bn) in CY2004. Chilled seafood sales are the driving force behind total category sales. An estimated 1.2 million new households have purchased chilled seafood since CY2000. Chilled seafood sales benefit from positive consumer perceptions about the relative quality and freshness of the category versus frozen seafood products. That said, the frozen category is making progress by broadening its product offering, with premium frozen products increasingly important to category sales. In addition to retail sales, the UK foodservice sector is estimated to use 165,000 MT of seafood per year. The UK's 8,600 fish and chip shops account much of this consumption.

The UK fishing industry has been characterized by a declining wild catch over the last decade. However, commercial landings increased in CY2004 to 457,712 MT. A 9 percent increase in the volume of the demersal catch was key to this upturn. Shellfish landings have grown in importance in recent years, following the declining fortunes of demersal and pelagic landings. They accounted for 27 percent of total landings in CY2004 against 17 percent in CY1994. In addition to the wild catch, the UK's aquaculture industry boosts seafood production. Salmon is the main species produced, accounting for more than 75 percent of UK aquaculture output. Shellfish and trout make up the remainder, although there are high expectations for the production of whitefish species.

The UK is a net importer of seafood and the volume of imports again increased in CY2004. The growing demand for value added and prepared seafood, together with more adventurous consumer tastes, means that there is a growing diversity of seafood entering the UK. The key imports from the U.S. are canned salmon and frozen fillets of Alaska Pollack. The U.S. has traditionally been the key supplier of canned salmon to the UK market. Although the canned food category is regarded as a mature and well-developed market, canned fish and seafood is one of the standout categories, with sector growth forecast at 20 percent over the next 5 years. The UK is also a significant exporter of seafood, exporting an estimated 477,000 MT to the UK in CY2004. Key markets for UK seafood exports are typically other EU member states and salmon and shellfish are key export categories.

Exchange rate used throughout this report is 1 BPS = US $1.85.

SECTION I: SITUATION & OUTLOOK

TOTAL EDIBLE FISHERY PRODUCTS

Production: Wild Catch

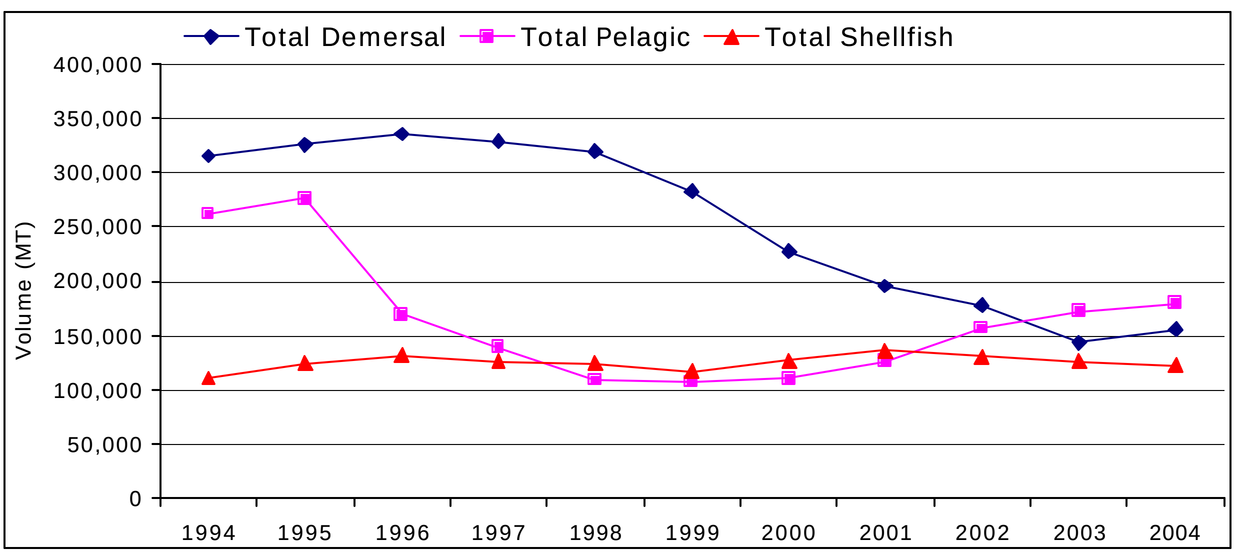
UK vessels landed 457,712 MT of fish into the UK in CY2004, according to provisional data from the UK's Department for Environment, Food and Rural Affairs (Defra). This represents an increase of 3.7 percent in landings over the same period in CY2003. The value of landings also increased. Total landings in CY2004 were valued at BPS 403.5 million (US $746.4 m), up 4.1 percent on CY2003.

The overall increase in landings was driven by a 9 percent increase in the demersal catch to 155,655 MT. This increase is significant because the UK demersal catch had been in decline since the late 1990s, as illustrated in the chart below. Pelagic landings continued the upward trend of recent years, recording a 4 percent increase in landings to 179,572 MT in CY2004. By contrast, shellfish landings were down 3 percent from CY2003 levels, to 122,485 MT. However, strong demand helped to support prices and the value of the shellfish catch increased by 2 percent.

With the decline in both demersal and pelagic landings over the last decade, shellfish landings have become of greater significance to the UK fishing industry. The volume of shellfish landings accounted for 27 percent of total landings in CY2004, against 17 percent in CY1994. In terms of value, shellfish landings are of even greater significance, accounting for 42 percent of the total wild catch value in CY2004. That said, shellfish landings in the first seven months of CY2005 are down by 11 percent on landings in the same period last year. So far this year, total landings for all fish types is down by 4 percent.

Wild catch data for key species is detailed in Section II: Table 1.

Chart 1: UK Wild Catch, Landings by UK Vessels by Fish Type 1994-2004



Source: Fisheries Statistical Unit, Department for Environment, Food and Rural Affairs (Defra).

Production: Aquaculture

UK aquaculture production has grown rapidly since the industry's inception in the 1980s. The key focus of production has traditionally been salmon, with Scotland the preferred location for aquaculture sites. However, tough trading conditions in recent times have restrained sector growth. The most recent official production estimate placed salmon production at 145,609 MT in CY2002 and it is likely that production levels have fallen since then. For more information, see the Salmon and Salmon Products section (page 11).

Given the challenges faced by UK salmon producers, there have been some suggestions that production sites could diversify into shellfish production. Farmed shellfish in Scotland is already estimated at some 4,573 MT. Mussels dominate shellfish production and volume increased by 16 percent year-on-year according to the latest Scottish Shellfish Production Survey 2004. Total shellfish production in the UK is estimated at approximately 27,800 MT, with the expansion of mussel production largely responsible for output increases in recent years. Increased market demand and subsequent strong prices have helped to boost UK production.

UK trout production remains relatively static, at circa 17,000 MT. The majority of this is destined for the table, with 25 percent of the annual production typically used for restocking or onward growing. Sales of trout also appear to be relatively stable, and no significant changes in production volumes are anticipated.

By contrast, there are high expectations for the production of whitefish species, particularly cod, at UK aquaculture sites. At present, UK farmed cod production is minimal, with just 600 MT expected to be brought to market in the current year. However, there are forecasts that production could be as high as 3,500 MT by CY2007. And with other species, such as halibut and turbot, already being farmed in Norway there is optimism about the possible diversification of the UK aquaculture industry.

Fish & Fishery Product Consumption

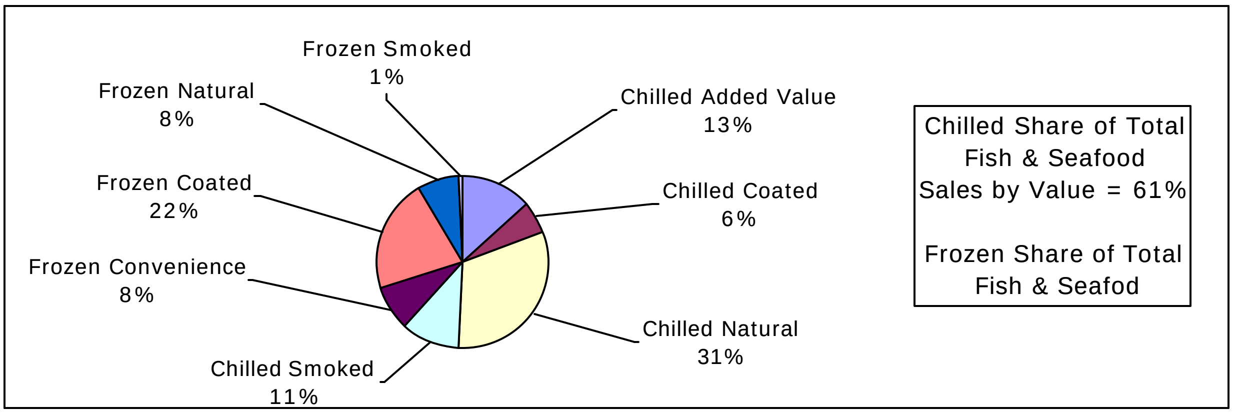
Retail Consumption

Data from the Seafish Industry Authority (Seafish) reveals that fish and seafood remains one of the fastest growing categories in the retail market. Consumer expenditure on the fish category recorded year-on-year growth of 6 percent in 2004. More recent data indicates that the category growth rate has increased, with fish outperforming red meat, poultry & game and fresh produce in the first quarter of 2005. Total UK consumer spend on seafood in 2004 was estimated at BPS 1.82 billion (US $3.37 bn).

The continued expansion of chilled seafood sales has been a critical factor in total category growth. Chilled seafood sales benefit from positive consumer perceptions about the relative quality and freshness of the category versus frozen seafood products. As indicated in charts 2 and 3, sales of chilled seafood dominate the fish category in terms of value and command a price premium over frozen seafood. An estimated 1.2 million new households started buying chilled fish over the last five years and by the beginning of 2005, over 80 percent of UK households purchased chilled fish at least once in a 52-week period. As a result, sales of chilled seafood have broken through the BPS 1 billion (US $1.85 bn) barrier.

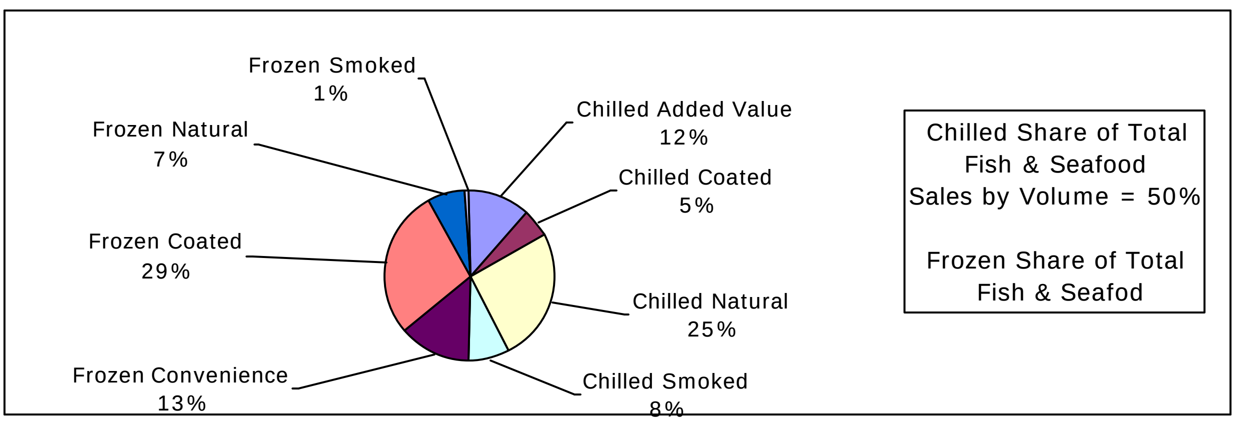
One of the driving factors of the expansion of the chilled food category has been the increased availability of fresh, farmed salmon since the early 1990s. Indeed, salmon is the most important species in the chilled sector, accounting for an estimated 30 percent of chilled fish sales. Despite well-documented supply issues, haddock and cod also remain key species at present. However, the real rising star in the chilled sector is the shrimp sector. Purchases totaled BPS 156 million (US $289 m) in 2004, representing year-on-year growth of 24 percent. In addition, volume was up by 19 percent over the same period. This overall market performance was underpinned by strong growth from warm water shrimp sales. Volume and value of sales increased by 35 percent and 44 percent respectively in 2004. The chilled shrimp sector also provides significant scope for retailers and food manufacturers to add value. For example, one half of coldwater shrimp are sold as value added products (coated, shrimp cocktails, fish pie, ready meals, etc). Increasing numbers of consumers buying chilled shrimps, more frequent purchasing and a greater average purchase volume are all positive indicators for continued sector expansion.

Chart 2: Value of Fish & Seafood Sales by Category



Source: Seafish/TNS

Chart 3: Volume of Fish & Seafood Sales by Category



Source: Seafish/TNS

Despite the success of chilled/fresh fish sales, frozen fish and seafood remains an important category because it accounts for approximately 50 percent of the volume of total seafood sales. However, market share is declining relative to chilled seafood. Indeed, the more traditional type products, such as breaded & battered steaks, are experiencing significant declines in sales. Instead, fillets and added value products drive frozen category growth. Just as the performance of chilled seafood is characterized by sales performance of shrimp, so the frozen shrimp sector tends to reflect the frozen category in general. Frozen product accounts for more than one half of total shrimp sales, but value growth has been relatively slow and volume has dipped. Despite the challenges, the frozen category has made considerable progress in broadening its product offering. In addition, consumers appear to have traded up to premium frozen products and the sector has worked hard to shake off its commodity-type image.

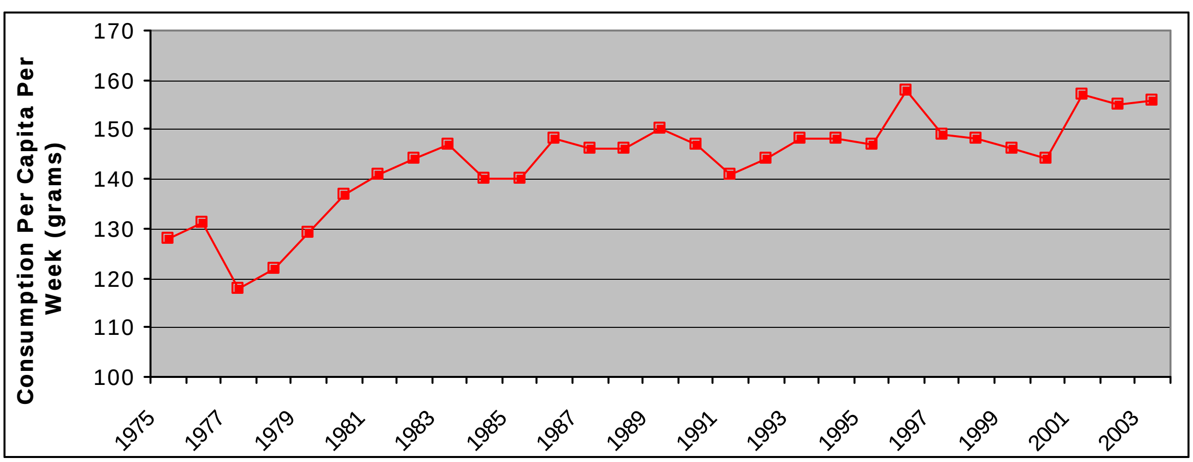
Multiple grocers accounted for 88 percent of fish and seafood sales in CY2004. In most food categories, the supermarket grocery chains dominate sales and fish is no different. The dominance of the leading supermarket chains in fish retailing is reflected in the long-term decline in the number of independent, specialist fishmongers in the UK. Remaining independents face a continual challenge, with research indicating that their customers tend to be older, have lower levels of disposable income and are from smaller households.

The supermarket retailers are well positioned to benefit from the trend towards added value and convenience. Wet fish counters are a feature of most larger supermarket outlets. This provides a mechanism for encouraging consumers to trial new species and gain information about preparation. Chiller cabinet displays are also a key display point for seafood, with packaging material used to communicate recipe ideas, cooking instructions and nutritional benefits to consumers. Despite the boost in seafood sales, particularly of chilled fish, British consumers remain relatively conservative in their tastes and do express concerns about how to properly cook and prepare fish and seafood dishes.

Private label products dominate chilled fish sales, with 81 percent of sales by value. This reflects the retailer dominance of fish and seafood distribution and the lack of branding opportunities available at fish counters and chiller display units in supermarket stores. Branding is more evident in the frozen sector. However, the leading supermarket chains are again expanding their private label market share, with particular progress recorded in the sale of premium and specialist frozen seafood products.

Underpinning the current performance of the UK seafood retail market is a long term upwards trend in household consumption of fish. Since 1974, weekly per capita consumption has increased by 27 percent, as indicated in Chart 4.

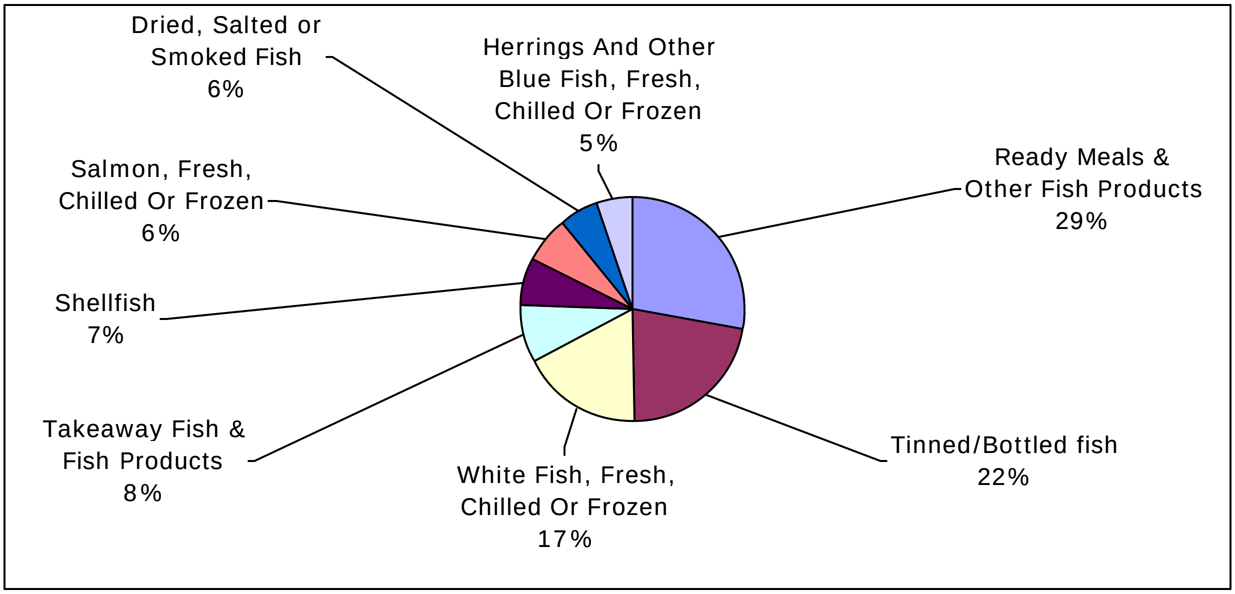
Chart 4: Weekly Per Capita Consumption of Fish and Fish Products



Source: National Statistics 2003/04 Expenditure & Food Survey

However, as discussed earlier, there has been considerable change in the components of total fish consumption. For example, there has been a swing away from white fish to ready prepared products. Driving factors for changes in consumption patterns are varied, but include the supply issues surrounding fresh white fish, the greater convenience offered by prepared seafood products, a desire by the consumer for trading up to better quality seafood products, the health benefits of fish consumption and an increasingly adventurous consumer seeking out different species of fish. Chart 5 indicates the share of fish consumption by product type, as measured by actual consumption rather than the category sales data presented earlier in this report.

Chart 5: Share of Weekly Per Capita Consumption of Fish by Product Type 2003/2004



Source: National Statistics 2003/04 Expenditure & Food Survey

HRI Consumption

The UK has in excess of 300,000 HRI outlets and the HRI sector is naturally a very complex and dynamic market. The sector continues to expand, driven by rises in disposable income and an increasing perception of eating out as a favored leisure activity. The sector was valued at BPS 28 billion (US $52 bn) in 2004, according to Euromonitor data.

Fish usage in the foodservice sector is estimated to be relatively constant at approximately 165,000 MT per year. The majority of this usage is by the profit sector, where consumption continues to be dominated by fish and chip shops. Despite competition from other takeaway foods, there are an estimated 8,600 fish and chip shop outlets in the UK. Collectively, they sell an estimated BPS 480 million (US $888 m) of seafood each year. The cost sector is declining in importance for the seafood category, with institutional caterers showing a preference for cheaper proteins. In common with the retail sector, consumers are faced with increasing range of seafood choice in most HRI outlets. Hotels and restaurants are leading the way and choice will continue to expand.

With such a fragmented HRI market, there are a number of supply chain models, dependent on the outlet type. In general, the presence of wholesalers is being eroded. This is particularly true when looking at institutions and multi-outlet restaurant chains. Importers/processors are increasingly selling fish and seafood products direct to these outlets where unit cost, high volume and product consistency are prime concerns.

Industry Marketing

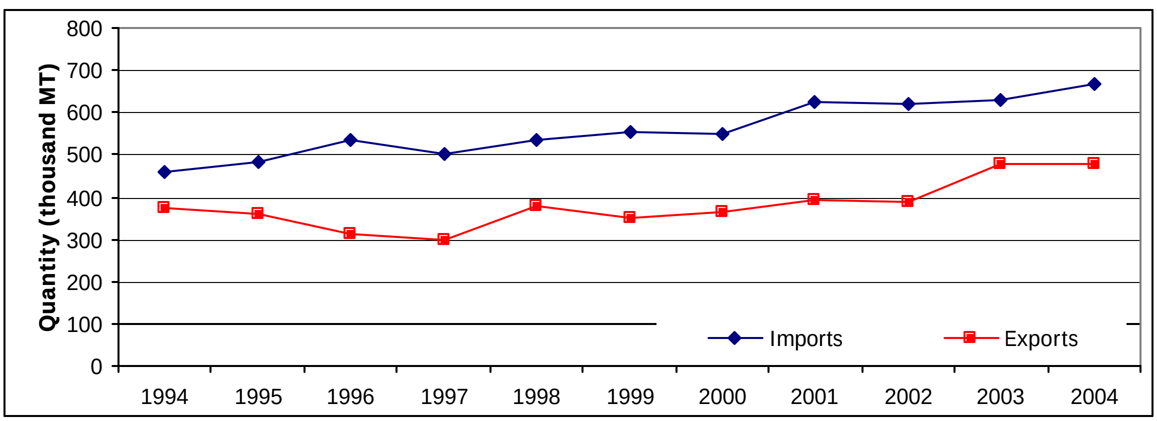
Seafish works across all sectors of the UK seafood industry, including fishermen, processors, wholesalers, importers, exporters, fish friers, food service and retailers. Through its activities, Seafish aims to raise standards, improve efficiency and ensure that the UK industry develops in a viable way.

Seafood promotion by Seafish includes elements of consumer PR, health campaigns, an education program, competitions and awards. A highlight of the PR campaign is Seafood Week in early October. It is supported by thousands of special events, tastings and promotions across the country and involves support from the UK's major retailers, restaurant and pub chains, seafood processors and fish and chip shops.

Trade

The UK is reliant on imports to meet domestic demand for fish and fish products. Trade data indicates a 6 percent increase in UK imports to 668,184 MT in CY2004. As indicated in the chart below, this is the continuation of a long-term trend. The total value of imports entering the UK last year is estimated at just under BPS 1.46 billion (US $2.7 bn). The growing demand for value added and prepared seafood, together with more adventurous consumer tastes, means that there is a growing diversity of seafood entering the UK. In CY2004, the UK imported product from over 100 different countries.

Chart 6: UK Imports and Exports of Fish and Fish Products 1994-2004



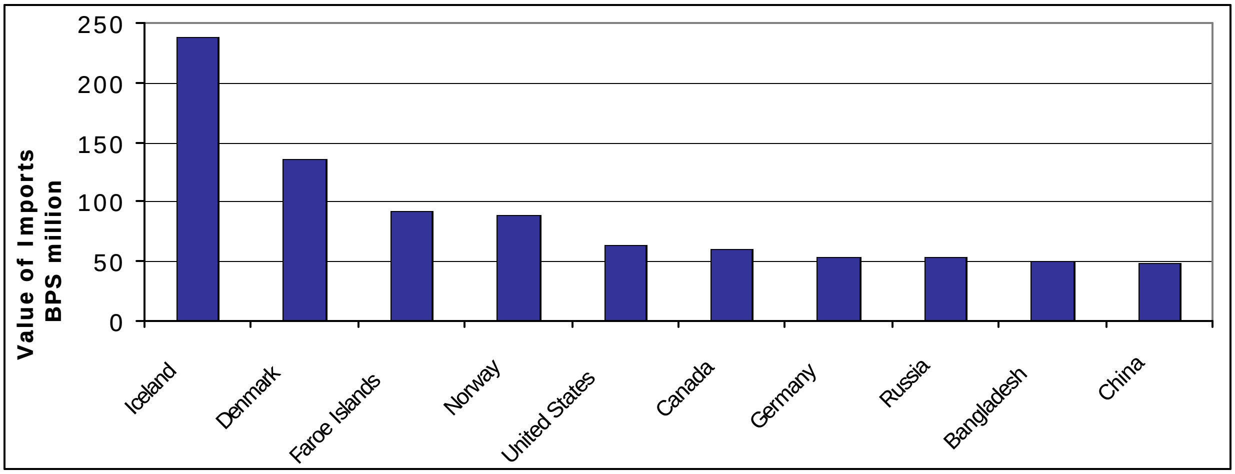
Source: Defra/World Trade Atlas

The leading suppliers of seafood to the UK are presented in Chart 7. The prominence of Iceland, Denmark, the Faroe Islands and Norway in this chart is indicative of the species profile of imports. For example, the UK's wild catch is supplemented with substantial imports of cod, haddock and other whitefish from the UK's North Sea neighbors. Even a significant proportion of trade with China consists of frozen cod fillets. Perhaps more indicative of the broadening scope of seafood demand in the UK is the presence of Bangladesh among the leading suppliers. Bangladesh is a key supplier of shrimp to the UK, while Mauritius, Ghana and the Seychelles remain key suppliers of prepared/preserved tuna.

Imports from the U.S. totaled 32,335 MT in CY2004, representing a 20 percent increase in the volume of trade. This trade generated approximately BPS 65 million (US $120 m) in revenues for U.S. exporters in CY2004 and consisted mainly of canned salmon and frozen fillets of Alaska Pollack. However, scallops now account for 5 percent of U.S. exports by value and trade has more than quadrupled since CY2000. In value terms, imports from the U.S.

accounted for approximately 5 percent of the UK's total edible fishery product imports in CY2004.

Chart 7: Top 10 Exporters of Fishery Products to the UK by Value CY2004

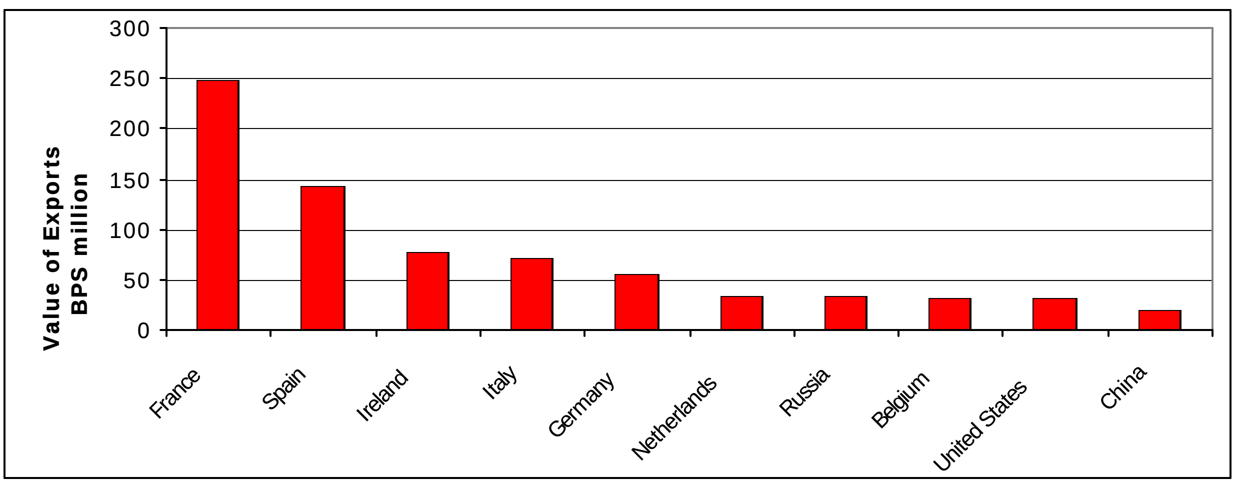


Source: World Trade Atlas

The UK is also a sizeable exporter of fish and fish products, exporting an estimated 477,000 MT in CY2004. The value and volume of exports remained relatively unchanged to the level recorded in CY2003. However, CY2005 export levels are set to rise, with an increase in export values and volumes in the first half of the year. As indicated in the chart below, the key customers of UK fish and fishery products are other EU member states. France and Spain remain the most important markets, with salmon and shellfish key export categories for the UK. Indeed, the UK is a net exporter of shellfish. Exports in CY2004 totaled some 106,000 MT versus imports of approximately 60,000 MT.

As well as being a leading supplier of seafood, the U.S. also features in the leading export markets, although shipments did decrease last year. The main product shipped to the U.S. is Scottish salmon. In volume terms, this accounted for 80 percent of the 11,898 MT of UK fish and fishery products that were shipped to the U.S. in CY2004.

Chart 8: Top 10 Importers of Fishery Products from the UK by Value CY2004



Source: World Trade Atlas

Salmon and Salmon Products

UK production of farmed salmon has been in a period of long-term growth since the mid-1980s. However, the challenges facing the European aquaculture industry as a result of low-cost competition from alternative suppliers has been well documented over the last two years. Scottish producers have been restricted to relatively small production sites compared to their competitors and have been unable to achieve economies of scale. An amount of uncertainty continues to characterize the farmed salmon sector. Merger and acquisition activity has been common, with Norwegian-owned companies now controlling a significant proportion of UK farmed salmon production.

Such uncertain market conditions, and particularly price fluctuations, have inevitably impacted on the levels of UK farmed salmon production. The latest published results for the Scottish Fish Farms Survey are for CY2002, when production was estimated at 145,609 MT. Industry and media speculation indicates that production will have decreased since then, with a figure of circa 137,000 MT likely for CY2004 production and a further decrease expected in the current calendar year. However, the imposition of safeguard measures by the EU to help shield salmon producers from competition with low priced salmon imports should yield a recovery in production levels next year.

Consumer demand for salmon continues to be strong. As indicated earlier in the report, salmon remains the most important fish by species in the chilled fish sector. The diversity of cuts, ease of preparation and its premium positioning have all helped to drive salmon sales forward. Over the longer-term, the increased domestic supply base has also supported sales expansion in UK retailers. Increasingly, salmon is appearing as an ingredient in fresh and frozen ready meals, according to the most recent Mintel report on the sector.

With production levels likely to have fallen and consumption patterns remaining strong, import volumes entering the UK have increased significantly. Imports in CY2004 were up by almost 50 percent from 11,309 MT to 16,794 MT. This upwards trend has continued in the first six months of 2005, with the volume of imports up by 90 percent in the first half of CY2005. Norway is the biggest supplier, supplying almost half of the UK imports of fresh and frozen salmon. Other key suppliers include China, the Faroe Islands and Denmark. All significantly increased their export volumes to the UK in CY2004, with the volume of salmon shipped from China growing by a staggering 283 percent.

The threat posed by low-cost imports of salmon and salmon products to domestic production has been well documented over the last two years. The average price of salmon and salmon products from leading non-EU suppliers, was less than the world average in CY2004. Product from Norway and the Faroes was approximately 10 percent below the world market price. However, product from China was one third cheaper than the average world price ($2.98 per kg versus $4.49).

Although import volumes have increased, the UK remains a net exporter of salmon. Indeed, salmon is one of the UK food market's leading exports and is particularly valuable to the Scottish economy. Exports totaled 61,343 MT in CY2004. This marked a decrease of 13 percent year on year and volumes have again fallen back in the first half of CY2005. The decline in exports in CY2004 was not unanticipated because CY2003 had marked significant exports from the UK, in part due to supply related problems in North America. And despite the decline witnessed so far in CY2005, the average price of exports in this time period is BPS 2.68 ($4.99), representing a 20 percent improvement year-on-year and a big improvement on prices in recent times. France continues to be the number export market for Scottish salmon. Despite the many challenges endured by the Scottish aquaculture industry, exports to France have continued to rise.

Scottish Quality Salmon (SQS) is the main trade association representing the salmon industry. SQS actively target the French market with their promotional activity, with Label Rouge certification being key to their overseas marketing strategy. SQS also provide support and expertise to the Scottish salmon industry through information, reassurance and technical support and operate promotional campaigns in the UK.

Salmon - Canned

The U.S. has traditionally been the key supplier of canned salmon to the UK market for the past century. With no domestic production, the UK is almost wholly reliant on North American supplies. The UK increased total imports of canned salmon by 19 percent in CY2004. Shipments from the U.S. were up by 37 percent according to trade data, giving the U.S. a 70 percent share of the UK canned salmon market and generating BPS 38 million (US $70 m) in export revenue for U.S. shippers. However, trade statistics can be misleading because product that is recorded as Canadian is often Alaskan salmon that has been packed or trans-shipped through Canada.

The canned food category is considered to be a mature and well-developed market. As such, many market analysts consider future growth prospects to be moderate at best. However, canned fish and seafood is one of the standout sub-sectors. Euromonitor has forecast value growth of over 20 percent over the next five years, driven mainly by tuna sales. Current market value of the canned fish/seafood sector is estimated at BPS 489 million (US $905 m). Tuna dominates canned fish/seafood sales with over 50 percent of sales by value. By contrast, the share of canned salmon is approximately 30 percent and has declined marginally. New formats and packaging, particularly the introduction of premium lines, will also contribute to category growth. The introduction of pouches could be critical to growth, as they are perceived as fresher than the traditional can format by consumers. However, the challenge of introducing premium lines into the category could limit potential future growth.

Canned salmon sales are dominated by the John West and Princes brands. Private label salmon is still discounted heavily at key times of the year. Canned salmon consumption is characterized by a reliance on older consumers. Approximately three quarters of canned salmon is purchased by consumers over the age of 45 and is particularly reliant on consumers 65+.

Groundfish, Whole/Eviscerated

Whole/eviscerated groundfish production and trade in the UK has relatively little impact on the U.S. seafood industry. U.S. imports from the UK amount to less than BPS 1.1 million (US $2 m), while product traded in the other direction is even less. Despite the overall increase in UK demersal landings, imports of whole/eviscerated groundfish increased in CY2004 to 89,656 MT. Imports are expected to increase marginally in the current year.

Exports of whole/eviscerated groundfish grew by 19 percent in CY2004. Of the 29,540 MT exported, over half was shipped China. Export volumes to China also look set to increase again through CY2005, with shipments already 2,000 MT greater than last year. China has effectively replaced France and Portugal as the key export markets for whole groundfish from the UK, although cod and haddock remain the key species exported.

The HRI sector is considered to be a key outlet for whole/eviscerated groundfish sales in the UK. Of course, with convenience and ease of preparation critical driving factors for seafood consumption, whole and eviscerated fish are not ideally positioned to benefit. However, whole groundfish consumption only utilizes a small proportion of domestic and imported suppliers. Rather, the bulk of the groundfish supplies enter the processing sector.

Groundfish, Fillets

Imports of groundfish fillets increased marginally in CY2004 to 130,164 MT and remain fundamental to the UK's supply of fillets. However, a general upward trend in average prices for key species meant that the cost of these imports increased by 11 percent and totaled BPS 334 million (US $617 m) in CY2004.

UK imports of key species have risen in relation to the declining wild catch, with fillets of cod and haddock accounting for over 80 percent of groundfish fillet imports. Major supplier countries naturally reflect the key demersal species fishery areas, with Iceland, Denmark, Norway and the Faroe Islands all exporting over 10,000 MT of groundfish fillets to the UK in CY2004. Trade data reveals that China again shipped just over 22,000 MT of product to the UK. This follows a 100 percent increase in volumes in CY2003. Cod is the prominent species in fillet shipments from China. However, frozen fillets of Alaska Pollack exported from China to the UK increased by 42 percent year on year and now account for almost 20 percent of China's groundfish fillet volume.

As in recent years, Alaska Pollack fillets accounted for almost the entire volume of groundfish fillet exports from the U.S. to the UK in CY2004. Volume increased by 4 percent to 7,751 MT, generating export revenue of BPS 10 million (US $18.9 m) for U.S. shippers. Volumes are expected to increase in CY2005, with year to date volumes some 25 percent greater than in the same period last year.

Following a 167 percent increase in UK exports of groundfish fillets in CY2003, export volumes remained high throughout CY2004. The majority of shipments were again destined for other EU member states. Shipments have declined so far in CY2005 and full year exports are not expected to reach the highs of the last two years. In particular, trade data indicates that transshipment of frozen Alaska Pollack fillets through the UK appears to have reduced significantly in CY2005.

SECTION II: STATISTICAL TABLES

Table 1 - UK Wild Catch, Landings by UK Vessels in the UK, 2001 - 2004
Source: Fisheries Statistical Unit, Department for Environment, Food and Rural Affairs (Defra).

LANDINGS BY UK VESSELS IN THE UK					
[redacted]					
	2001	**2002**	**2003**	**2004**	**% change (2003-2004)**
Cod	28086	25724	15504	15184	-2.1
Dogfish	6976	5781	6512	4638	-28.8
Haddock	42330	51874	40659	45384	11.6
Hake	2217	2075	1937	2219	14.6
Lemon Sole	3594	2323	2195	2065	-5.9
Anglerfish	15139	13119	10120	10786	6.6
Plaice	7665	5939	4364	3496	-19.9
Saithe (coley)	9653	9888	8481	8995	6.1
Sole	2148	2140	2260	1993	-11.8
Whiting	15140	11430	8161	7399	-9.3
Other Demersal	62582	47776	43023	53496	24.3
Total Demersal	**195530**	**178069**	**143216**	**155655**	**8.7**
Herring	43808	42466	55248	56214	1.7
Mackerel	63912	96609	106468	115299	8.3
Other Pelagic	18937	17731	10332	8059	-22.0
Total Pelagic	**126657**	**156806**	**172048**	**179572**	**4.4**
Crabs	24959	23261	22996	20417	-11.2
Nephrops	28405	28382	27599	30317	9.8
Other Shellfish	82799	79106	75319	71751	-4.7
Total Shellfish	**136163**	**130749**	**125914**	**122485**	**-2.7**
TOTAL	**458350**	**465624**	**441178**	**457712**	**3.7**

Table 2 - Salmon and Salmon Products, PS&D Table

Commodity	**Salmon, Whole/Eviscerated**				(MT)		
	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2004		01/2005		01/2006	MM/YYYY
Beginning Stocks	500		800	800	1000	1400	(MT)
Total Production	142200	137600	140000	116000	0	130000	(MT)
Intra-EC Imports	3600	3300	3000	4300	0	3300	(MT)
Other Imports	11800	13500	9500	22500	0	19000	(MT)
TOTAL Imports	15400	16800	12500	26800	0	22300	(MT)
TOTAL SUPPLY	158100	154400	153300	143600	1000	153700	(MT)
Intra-EC Exports	46800	49600	43500	38900	0	42800	(MT)
Other Exports	18200	11700	14900	12500	0	14500	(MT)
TOTAL Exports	65000	61300	58400	51400	0	57300	(MT)
Domestic Consumption	65800	64900	67100	63200	0	66500	(MT)
Other Use/Loss	26500	27400	26800	27600	0	28100	(MT)
TOTAL Utilization	92300	92300	93900	90800	0	94600	(MT)
Ending Stocks	800	800	1000	1400	0	1800	(MT)
TOTAL DISTRIBUTION	158100	154400	153300	143600	0	153700	(MT)

Table 3 - Salmon and Salmon Products, Prices Table

Country	United Kingdom		
Commodity	Salmon, Whole/Eviscerated		
Prices in	pence	per uom	kg
Year	2004	2005	% Change
Jan	235	230	-2%
Feb	235	230	-2%
Mar	235	230	-2%
Apr	220	230	5%
May	230	290	26%
Jun	230	290	26%
Jul	230	290	26%
Aug	230	300	30%
Sep	230	305	33%
Oct	225		-100%
Nov	230		-100%
Dec	230		-100%
Exchange Rate	0.54	Local Currency/US $	
Date of Quote	8/1/2005	MM/DD/YYYY	

Table 4 - Salmon and Salmon Products, Import Matrix

Country	United Kingdom		
Commodity	Salmon, Whole/Eviscerated		
Time Period	CY	Units:	MT
Imports for:	2003		**2004**
U.S.	730	U.S.	850
Others		Others	
Norway	5392	Norway	7978
Faroe Islands	1693	China	2092
Denmark	900	Faroe Islands	2009
Ireland	733	Denmark	1507
Germany	588	Ireland	752
China	547	Germany	598
Chile	412	Chile	403
France	158	Netherlands	160
Sweden	70	France	113
Netherlands	47	Belgium	98
Total for Others	10540		15710
Others not Listed	39		234
Grand Total	11309		16794

Table 5 - Salmon and Salmon Products, Export Matrix

Country	United Kingdom		
Commodity	Salmon,		

	Whole/Eviscerated		
Time Period	CY	Units:	MT
Exports for:	2003		**2004**
U.S.	14166	U.S.	9541
Others		Others	
France	27954	France	30696
Germany	6095	Germany	3770
Spain	5651	Spain	3024
Ireland	3563	Ireland	2946
Japan	3252	Belgium	2078
Belgium	2541	Japan	1910
Denmark	1530	Denmark	1497
Netherlands	1302	Netherlands	1002
Canada	1090	China	766
Taiwan	735	Poland	668
Total for Others	53713		48357
Others not Listed	2506		3445
Grand Total	70385		61343

Table 6 - Salmon Canned, PS&D Table

PSD Table							
Country	United Kingdom						
Commodity	Salmon, Canned				(MT)		
	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2004		01/2005		01/2006	MM/YYYY
Beginning Stocks	2450	2450	1800	3200	1200	1900	(MT)
Total Production	0	0	0	0	0	0	(MT)
Intra-EC Imports	700	750	1200	800	0	900	(MT)
Other Imports	24800	26150	24300	23900	0	24200	(MT)
TOTAL Imports	25500	26900	25500	24700	0	25100	(MT)
TOTAL SUPPLY	27950	29350	27300	27900	1200	27000	(MT)
Intra-EC Exports	550	600	600	600	0	550	(MT)
Other Exports	200	250	200	150	0	150	(MT)
TOTAL Exports	750	850	800	750	0	700	(MT)
Domestic Consumption	25400	25300	25300	25250	0	25200	(MT)
Other Use/Loss	0	0	0	0	0	0	(MT)
TOTAL Utilization	25400	25300	25300	25250	0	25200	(MT)
Ending Stocks	1800	3200	1200	1900	0	1100	(MT)
TOTAL DISTRIBUTION	27950	29350	27300	27900	0	27000	(MT)

Table 7 - Salmon Canned, Import Matrix

Country	United Kingdom		
Commodity	Salmon, Canned		
Time Period	CY	Units:	MT
Imports for:	2003		2004
U.S.	13834	U.S.	18901
Others		Others	
Canada	6644	Canada	6351
Chile	748	Chile	610
Ireland	407	Germany	395
Germany	326	Thailand	394
Thailand	233	France	74
Netherlands	177	South Korea	58
France	131	Netherlands	42
South Korea	101	Spain	26
Spain	40	China	16
Norway	17	Indonesia	15
Total for Others	8824		7981
Others not Listed	18		23
Grand Total	22676		26905

Table 8 - Salmon Canned, Export Matrix

Country	United Kingdom		
Commodity	Salmon, Canned		
Time Period	CY	Units:	MT
Exports for:	2003		2004
U.S.	22	U.S.	56
Others		Others	
Ireland	420	Ireland	494
Germany	81	Canada	36
France	53	Netherlands	33
Netherlands	28	Hong Kong	33
Spain	18	Norway	22
Hong Kong	14	France	18
Malta	13	Chile	18
Singapore	12	Germany	12
Thailand	11	Thailand	12
Bermuda	11	Malta	11
Total for Others	661		689
Others not Listed	70		96
Grand Total	753		841

Table 9 - Groundfish Whole/Eviscerated, PS&D

PSD Table							
Country	**United Kingdom**						
Commodity	**Groundfish, Whole/Eviscerated**				(MT)		
	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2004		01/2005		01/2006	MM/YYYY
Beginning Stocks	4300	4300	3800	4200	3600	3500	(MT)
Total Production	61000	70650	57200	70550	0	68500	(MT)
Intra-EC Imports	8200	7050	9600	4600	0	5800	(MT)
Other Imports	81200	82600	76200	86900	0	85400	(MT)
TOTAL Imports	89400	89650	85800	91500	0	91200	(MT)
TOTAL SUPPLY	154700	164600	146800	166250	3600	163200	(MT)
Intra-EC Exports	15600	15550	14650	15500	0	15800	(MT)
Other Exports	13700	14000	12400	19600	0	17500	(MT)
TOTAL Exports	29300	29550	27050	35100	0	33300	(MT)
Domestic Consumption	8900	9450	8900	9500	0	9200	(MT)
Other Use/Loss	112700	121400	107250	118150	0	118500	(MT)
TOTAL Utilization	121600	130850	116150	127650	0	127700	(MT)
Ending Stocks	3800	4200	3600	3500	0	2200	(MT)
TOTAL DISTRIBUTION	154700	164600	146800	166250	0	163200	(MT)

Table 10 - Groundfish Whole/Eviscerated, Prices Table

Country	United Kingdom		
Commodity	Groundfish, Whole/Eviscerated		
Prices in	pence	per uom	kg
Year	2004	2005	% Change
Jan	420	551	31%
Feb	420	480	14%
Mar	425	480	13%
Apr	440	525	19%
May	420	480	14%
Jun	464	500	8%
Jul	464	500	8%
Aug	441	550	25%
Sep	464	550	19%
Oct	464		-100%
Nov	464		-100%
Dec	551		-100%
Exchange Rate	0.54	Local Currency/US $	
Date of Quote	8/1/2005	MM/DD/YYYY	

Table 11 - Groundfish Whole/Eviscerated, Import Matrix

Country	United Kingdom		
Commodity	Groundfish, Whole/Eviscerated		
Time Period	CY	Units:	MT
Imports for:	2003		**2004**
U.S.	23	U.S.	41
Others		Others	
Faroe Islands	26265	Faroe Islands	25706
Russia	24520	Russia	25368
Norway	14462	Iceland	24826
Iceland	5595	Norway	6577
Ireland	3448	Ireland	2290
Denmark	3089	Denmark	1862
Germany	2090	Germany	1024
France	1741	France	861
Portugal	334	Sweden	524
South Africa	128	Belgium	160
Total for Others	81672		89198
Others not Listed	363		417
Grand Total	82058		89656

Table 12 - Groundfish Whole/Eviscerated, Export Matrix

Country	United Kingdom		
Commodity	Groundfish, Whole/Eviscerated		

Time Period	CY	Units:	MT
Exports for:	2003		**2004**
U.S.	436	U.S.	282
Others		Others	
China	8335	China	11296
France	6142	France	7853
Spain	3529	Portugal	3004
Portugal	2680	Spain	2919
Canada	949	Norway	1358
Norway	430	Denmark	899
Ireland	407	Hong Kong	453
Denmark	322	Ireland	403
Netherlands	277	Netherlands	356
Thailand	184	Canada	332
Total for Others	23255		28873
Others not Listed	1061		385
Grand Total	24752		29540

Table 13 - Groundfish Fillets, PS&D Table

PSD Table							
Country	**United Kingdom**						
Commodity	**Groundfish, Fillets**				(MT)		
	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2004		01/2005		01/2006	MM/YYYY
Beginning Stocks	1600	1600	1500	900	1200	1400	(MT)
Total Production	36500	40500	35500	38500	0	37500	(MT)
Intra-EC Imports	29600	32800	30500	27800	0	30400	(MT)
Other Imports	103600	97400	103100	101300	0	100500	(MT)
TOTAL Imports	133200	130200	133600	129100	0	130900	(MT)
TOTAL SUPPLY	171300	172300	170600	168500	1200	169800	(MT)
Intra-EC Exports	22600	24600	23000	18400	0	21500	(MT)
Other Exports	2200	2500	1800	1400	0	1950	(MT)
TOTAL Exports	24800	27100	24800	19800	0	23450	(MT)
Domestic Consumption	145000	144300	144600	147300	0	145550	(MT)
Other Use/Loss	0	0	0	0	0	0	(MT)
TOTAL Utilization	145000	144300	144600	147300	0	145550	(MT)
Ending Stocks	1500	900	1200	1400	0	800	(MT)
TOTAL DISTRIBUTION	171300	172300	170600	168500	0	169800	(MT)

Table 14 - Groundfish Fillets, Prices Table

Country	United Kingdom		
Commodity	Groundfish, Fillets		
Prices in	pence	per uom	kg
Year	2004	2005	% Change
Jan	525	600	14%
Feb	525	480	-9%
Mar	551	550	0%
Apr	551	550	0%
May	488	480	-2%
Jun	488	600	23%
Jul	488	550	13%
Aug	535	565	6%
Sep	410	550	34%
Oct	375		-100%
Nov	375		-100%
Dec	450		-100%
Exchange Rate	0.54	Local Currency/US $	
Date of Quote	8/1/2005	MM/DD/YYYY	

Table 15 - Groundfish Fillets, Import Matrix

Country	United Kingdom		
Commodity	Groundfish, Fillets		
Time Period	CY	Units:	MT
Imports for:	2003		**2004**
U.S.	7428	U.S.	7751
Others		Others	
Iceland	26703	Iceland	32040
China	22689	China	22273
Denmark	21004	Denmark	20652
Russia	15037	Norway	14506
Norway	14035	Faroe Islands	10849
Faroe Islands	7502	Russia	7992
Germany	5319	Germany	7055
Poland	3007	Poland	1686
Spain	1086	Spain	1172
Greenland	957	Canada	929
Total for Others	117339		119154
Others not Listed	2818		3259
Grand Total	127585		130164

Table 16 - Groundfish Fillets, Export Matrix

Country	United Kingdom		
Commodity	Groundfish, Fillets		
Time Period	CY	Units:	MT
Exports for:	2003		**2004**
U.S.	419	U.S.	629

Others		Others	
Germany	12509	Germany	11164
France	5498	Ireland	6939
Ireland	2243	France	3945
Spain	1179	Spain	1018
Sweden	1002	Thailand	714
Denmark	964	Norway	492
Netherlands	598	Netherlands	439
China	501	Belgium	405
Norway	344	China	291
Belgium	259	Denmark	273
Total for Others	25097		25680
Others not Listed	600		757
Grand Total	26116		27066