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United Kingdom

Fishery Products

Annual Report

2006

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Report Highlights:
Fish and fishery product sales remain buoyant in the UK, with chilled and ambient seafood demand driving category growth. The CY2005 UK commercial catch was similar to the previous year after a decade in decline. However, the UK remains reliant on imports to meet consumers' need for seafood, especially for whitefish. The U.S. exported $135 million of fish and fish products to the UK in CY2005. The U.S. is a key supplier of canned salmon to the UK with a 64% share of the market. Alaska Pollack and scallops are increasingly prominent in U.S. shipments to the UK.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
London [UK1]
[UK]

Table of Contents

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 2.3 (US $4.3) billion in CY2005. Chilled and ambient 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 remains important and is defending its market position 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 for much of this consumption.

The UK fishing industry has been characterized by a declining wild catch over the last decade. However, at 460,249 MT, commercial landings in CY2005 were similar to CY2004. The value of landings increased by 12 percent, driven by a 50 percent increase in the value of the pelagic catch, symptomatic of the tightness in supply. Shellfish landings have grown in importance in recent years, following the declines in demersal and pelagic landings. They accounted for 27 percent of total landings in CY2005 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 CY2005. 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. CY2006 has also seen shipments of frozen mackerel from the U.S., demand in the processing sector fuelling increased import demand following a reduction in the UK commercial catch. The UK is also a significant exporter of seafood, exporting an estimated 461,000 MT in CY2005. Key markets for UK seafood exports are typically other EU member states and salmon and shellfish are key export categories.

The exchange rate used throughout this report is 1 BPS = US $1.88.

SECTION I: SITUATION & OUTLOOK

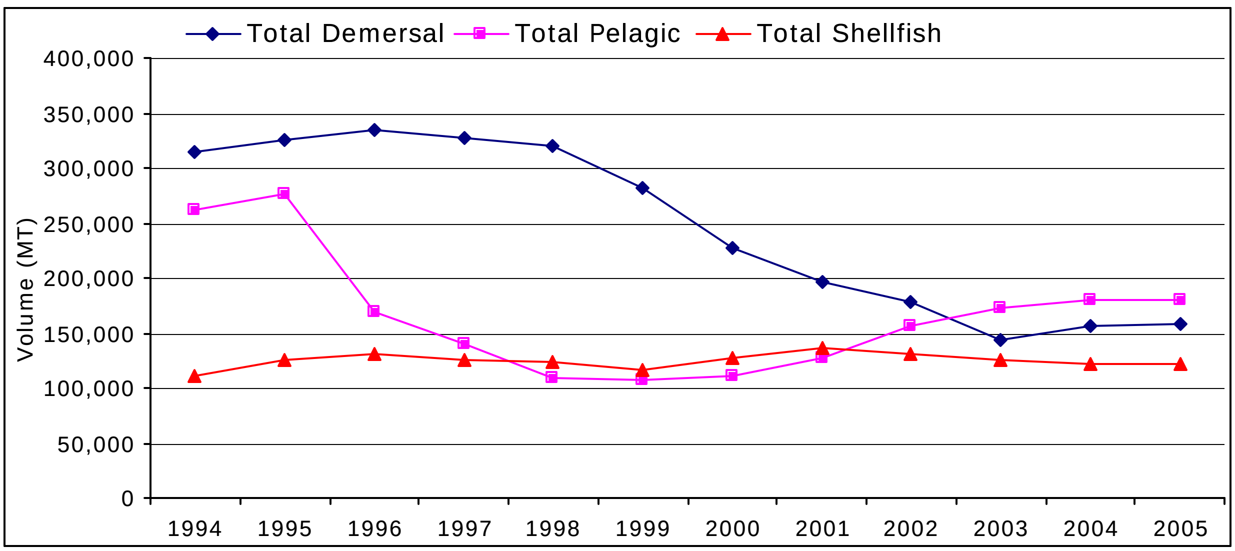
Total Edible Fishery Products

Production

Wild Catch

UK vessels landed 460,249 MT of fish into the UK in CY2005, according to provisional data from the UK's Department for Environment, Food and Rural Affairs (Defra). This is a similar volume to CY2004 following a decade of decline. Of more significance was the large increase in the value of landings in CY2005 which reached BPS 452.5 (US $850) million, up 12 percent on CY2004. This large increase was driven by a 50 percent increase in the value of the pelagic catch to BPS 98.4 (US $185) million. Indeed, if it were not for an 18 percent decline in the landings of mackerel, the price of which rose 68 percent between CY2005 and CY2004, then the increase would have been even more significant.

Chart 1: UK Wild Catch, Landings by UK Vessels by Fish Type 1994-2005



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

CY2005 saw a rise in the UK demersal catch for the second year running to 157,555 MT. It had been in long term decline since the late 1990s, as illustrated in the chart above, in line with declining Total Allowable Catch (TAC) volumes for demersal fish. Pelagic landings steadied at 180,254 MT in CY2005. They have been following an upward trend in recent years as fishermen switched away from demersal to pelagic catches. However, these too are now coming under increasing scrutiny and the influence of TACs. It is this, combined with strong demand from the processing sector, particularly canning, that has caused the sharp rise in prices observed in the sector in CY2005. Finally, shellfish landings have steadied in CY2005 and are very similar to CY2004 levels at 122,440 MT. Strong demand in this sector has seen shellfish prices rise 7 percent year-on-year.

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 CY2005, against 17 percent in

CY1994. In terms of value, shellfish landings are of even greater significance, accounting for 40 percent of the total wild catch value in CY2005.
In the first six months of CY2006, demersal landings are up 52 percent, largely due to a doubling in the volume of non-traditional species landed. Pelagic landings are 9 percent up but more significantly the mackerel catch, which fell so sharply in CY2005 is little changed this year, the increase being accounted for by herring landings. Shellfish landings record a 5 percent decline thus far this year. In value terms, all sectors are recording similar gains of around 21 percent.

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. Production is now recovering after difficult trading conditions, most notably declining prices, over the past two years which saw the industry's first contraction in more than a decade. Official production data published by the Fisheries Research Services (FRS) for the Scottish Executive placed salmon production at 169,736 MT in CY2003 before declining to 158,099 MT in CY2004. The FRS estimates that CY2005 production fell again to 136,056 MT but industry sources suggest that production was, in fact, similar to CY2004. CY2006 is forecast to see the first rise in production in three years.

Total shellfish production in the UK in CY2004, the last year for which data is available, was 27,831 MT. Of this total 26,611 MT was mussels, for which demand remains very strong in the UK, and 1,019 MT Pacific oysters.

According to official statistics from Defra, UK trout production remained relatively static in CY2004, at 15,917 MT. The majority of this is destined for the table, with 26 percent of the annual production being used for restocking or onward growing. Sales of trout also appear to be relatively stable, and no significant changes in production volumes are anticipated.

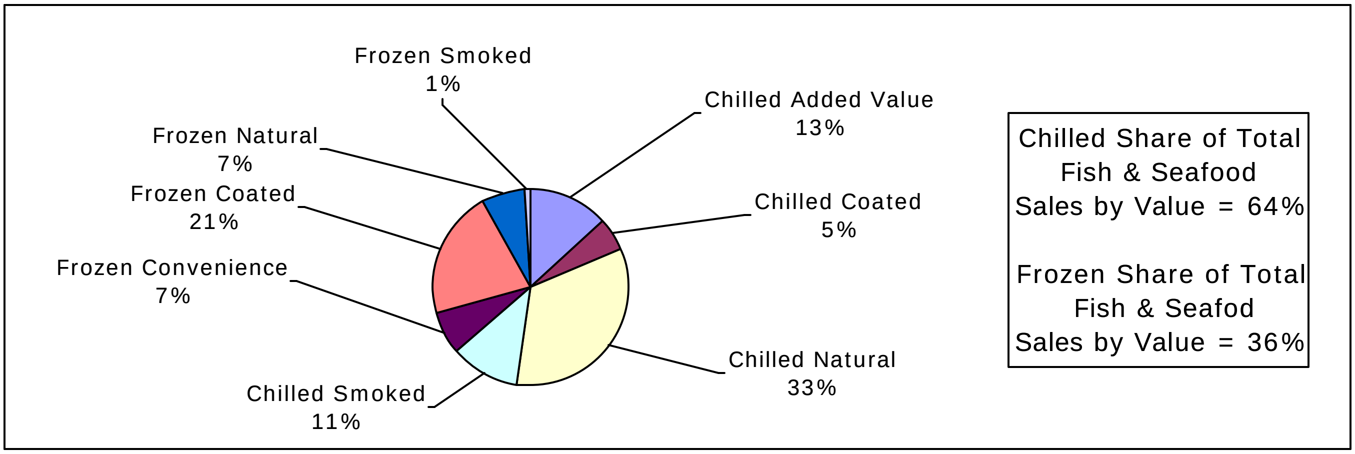
Fish & Fishery Product Consumption

Retail Consumption

Data from the Seafish Industry Authority (Seafish) to end-May 2006 reveal that fish and seafood remains one of the fastest growing categories in the retail market. Total consumer expenditure on all seafood (fresh, frozen and ambient) reached almost BPS 2.3 (US $4.3) billion, a 6 percent rise on the previous year. In value terms, the chilled and ambient sectors are the fastest growing segments, with chilled showing 8 percent growth and canned 6 percent. In volume terms, the chilled sector is showing the strongest growth at 4 percent year-on-year.

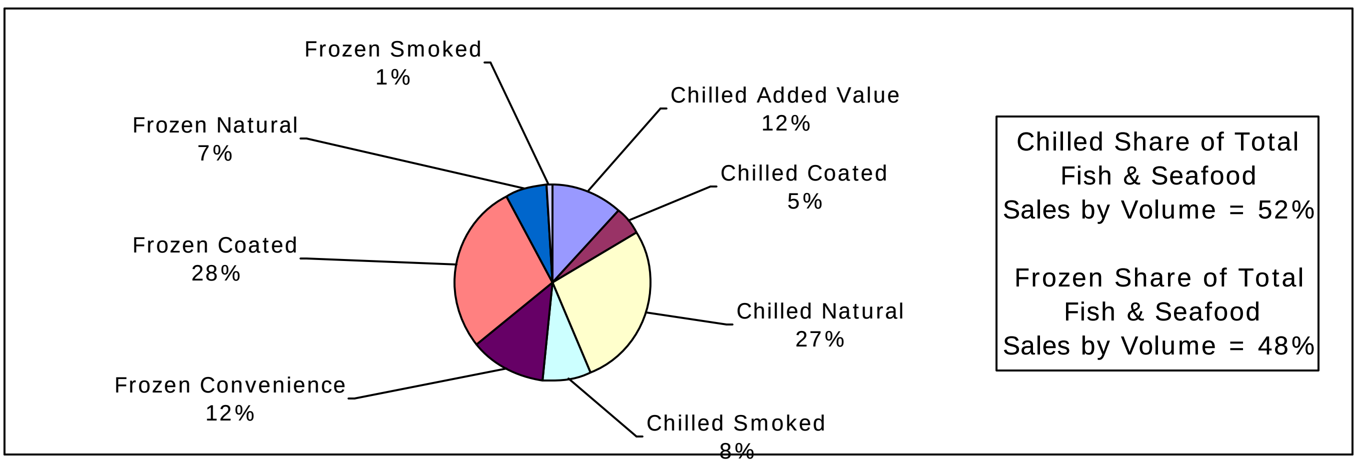
Chilled seafood sales benefit from positive consumer perceptions about the relative quality and freshness of the category versus frozen seafood products. Sales of chilled seafood dominate the fish category in terms of value and command a price premium over frozen seafood. Total sales of chilled seafood reached over BPS 1.2 (US $2.3) billion in the year to end-May. Within this category, natural seafood accounted for the largest spend of almost BPS 495,000 (US $931,500) but was also up 14 percent on the previous year.

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, accounting for almost 50 percent of the volume of total seafood sales. However, market share is declining relative to chilled seafood.

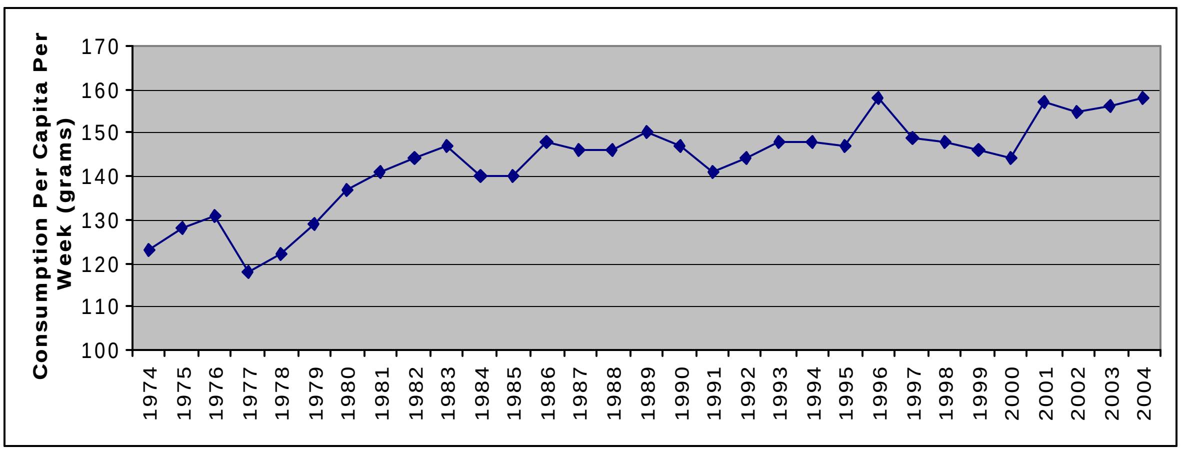
Multiple grocers accounted for 79 percent of fish and seafood sales in CY2005. In most food categories, the supermarket grocery chains dominate sales and fish is no different. The dominance of the leading supermarket chains in fish retailing is reflected in the long-term decline in the number of independent, 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. 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 28 percent to 158 grams per person per week, as indicated in Chart 4.

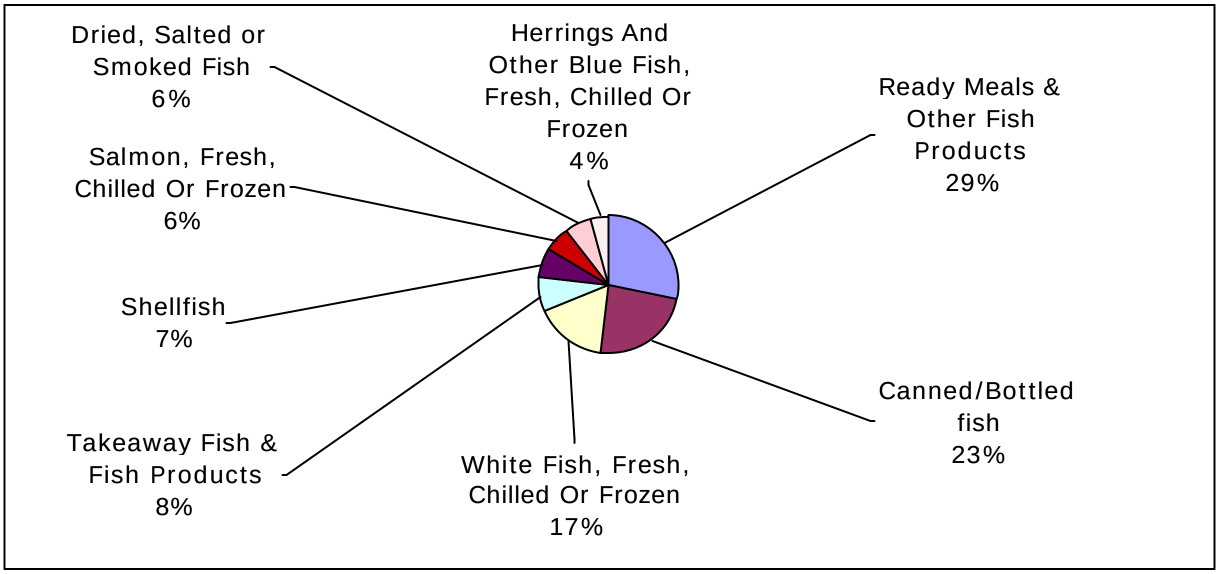
Chart 4: Weekly Per Capita Consumption of Fish and Fish Products



Source: National Statistics 2004/05 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: Weekly Per Capita Consumption of Fish by Product Type 2004/2005



Source: National Statistics 2004/05 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 was valued at BPS 33.5 (US $63) billion in 2004 with 50 percent of people eating out once a week or more, according to Seafish. While the total number of meals sold declined 4 percent between 2003 and 2004 and a further 4 percent between 2004 and 2005, the fish market has performed particularly well. In CY2005 it recorded growth of 6 percent, outperforming all other proteins.

Of the total protein HRI market in CY2005, the non-profit sector accounted for about 13 percent of the total with fish's popularity being evenly split between that and the profit sector at 33 percent of total protein consumption. According to Seafish, fish is seeing strong growth in the non-profit sector of 13 percent year on year, boosted by the increasing focus on the health benefits of fish. In the profit sector, consumption continues to be dominated by fish and chip shops despite competition from other takeaway foods.

Cod remains the most popular fish consumed outside of home. Prawns are proving increasingly popular, driven by their versatility in ethnic cuisines. Salmon and tuna are also important with growth driven by the popularity of Omega-3.

In common with the retail sector, consumers are faced with an 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

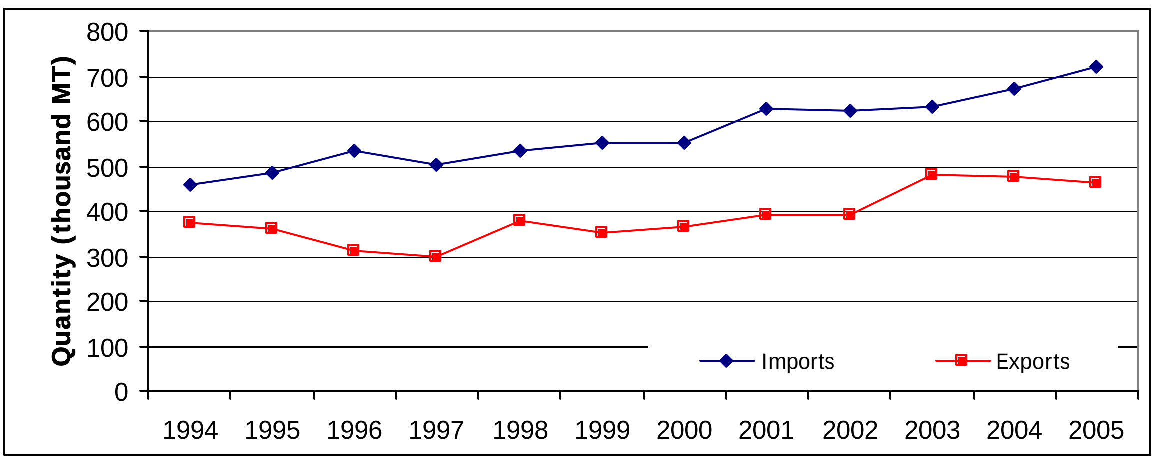
Seafish works across all sectors of the UK seafood industry, including fishermen, processors, wholesalers, importers, exporters, fish friers, food service and retailers. Through its activities, Seafish aims to raise standards, improve efficiency and ensure that the UK industry develops in a viable way.

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 7 percent increase in UK imports to 718,131 MT in CY2005. 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 1.67 (US $3.14) billion. 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 CY2005, the UK imported product from over 150 different countries.

Chart 6: UK Imports and Exports of Fish and Fish Products 1994-2005

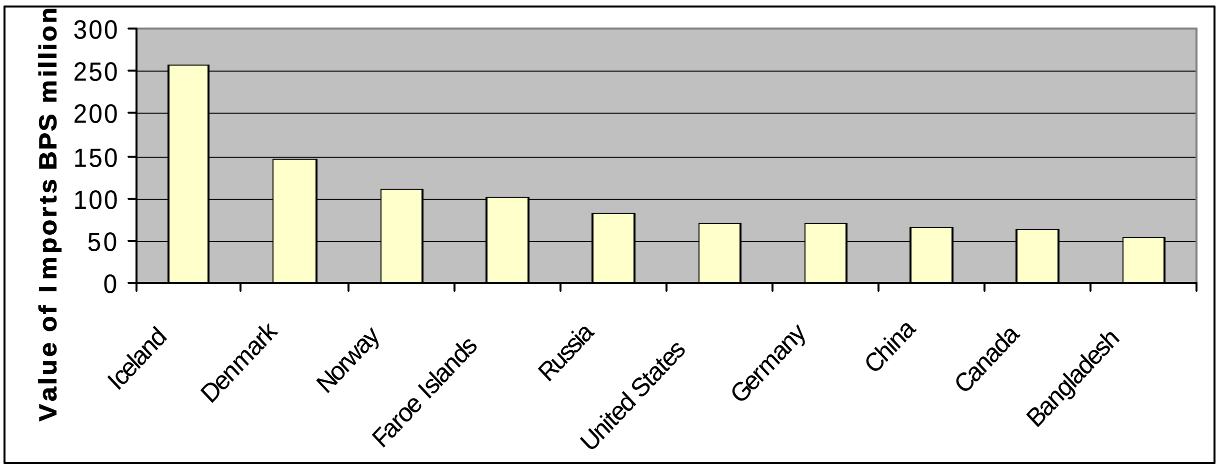


Source: Defra/World Trade Atlas

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 and India among the leading suppliers. Bangladesh and India are key suppliers of shrimp to the UK, while Mauritius, Ghana and the Seychelles remain key suppliers of prepared/preserved tuna.

Imports from the U.S. totaled 32,134 MT in CY2005, a similar level to CY2004 but a 20 percent increase on CY2003. This trade generated approximately BPS 71.8 (US $135) million in revenues for U.S. exporters in CY2005 and consisted mainly of canned salmon and frozen fillets of Alaska Pollack. However, scallops' success story continues. In CY2005 they accounted for over 10 percent of U.S. exports by value and trade has doubled in volume since CY2004 and increased fifteenfold since CY2000. In value terms, imports from the U.S. accounted for 4.3 percent of the UK's total edible fishery product imports in CY2005. CY2006 is expected to see continued strength in U.S. imports. Of particular note is a sharp increase in frozen mackerel imports in the first six months of the year from the U.S. As mentioned previously, the UK mackerel catch fell sharply in CY2005 and is forecast steady in CY2006. Strong demand in the canning sector is expected to see increased imports of both fresh and frozen mackerel, with the U.S. one of the beneficiaries.

Chart 7: Top 10 Exporters of Fishery Products to the UK by Value CY2005

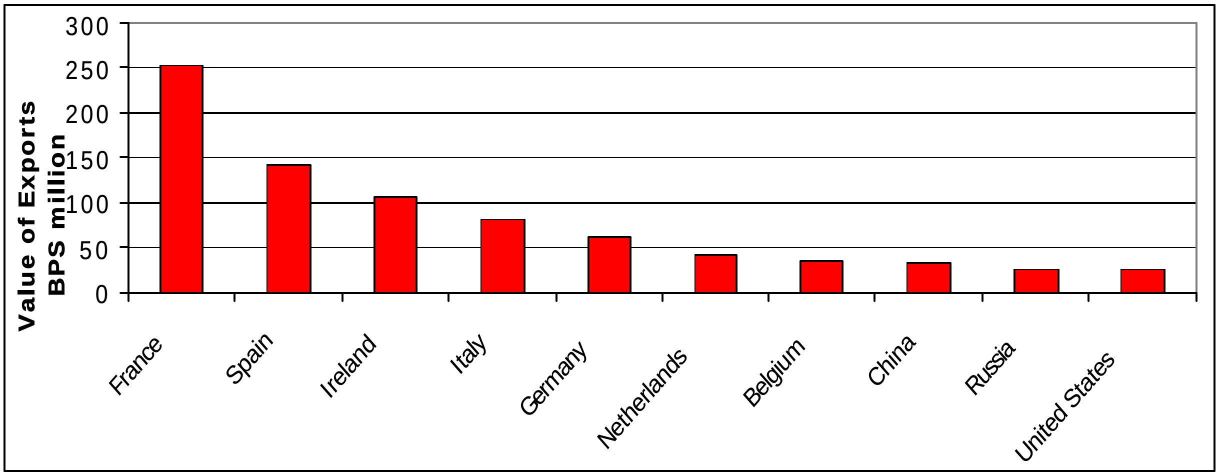


Source: World Trade Atlas

The UK is also a sizeable exporter of fish and fish products, exporting an estimated 461,000 MT in CY2005. While the volume fell, by just 3 percent, there was a 6 percent increase in value, a reflection of the strength of the British pound sterling over the period. As indicated in the chart overleaf, 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.

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 74 percent of the 7,217 MT of UK fish and fishery products that were shipped to the U.S. in CY2005.

Chart 8: Top 10 Importers of Fishery Products from the UK by Value CY2005



Source: World Trade Atlas

Salmon and Salmon Products

Up until CY2003, UK production of farmed salmon had 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. According to the latest Scottish Fish Farm Survey, record production in CY2003 of 169,736 MT was followed by a 7 percent decline in CY2004 to 158,099. Market sources indicate that production remained little changed in CY2005, contrary to some earlier concerns in the sector that CY2005 would see a further significant drop in production. The imposition of safeguard measures by the EU, specifically a Minimum Import Price (MIP) on Norwegian salmon, has not diminished import volumes. Indeed, they continue to rise. But the MIP has buoyed domestic prices, providing much needed support to the UK salmon industry and, as such, production is forecast steady in CY2006.

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. Increasingly, salmon is also appearing as an ingredient in fresh and frozen ready meals, according to the most recent Mintel report on the sector.

With production levels leveling and consumption patterns remaining strong, import volumes entering the UK have increased significantly. Imports in CY2005 were up nearly 80 percent from 16,794 MT to 29,958 MT. This upwards trend has continued in the first six months of 2006, with the volume of imports up by a further 15 percent in the first half of CY2006. Norway is the biggest supplier, supplying nearly 50 percent of the UK imports of fresh and frozen salmon in CY2005. Other key suppliers include China, the Faroe Islands and Denmark but other countries are also becoming increasingly important. These include Germany, Sweden, Chile and the U.S. Indeed, the U.S. recorded a 65 percent increase in exports in CY2005 to 1,399 MT and the first six months of CY2006 have seen U.S. origin exports double.

Unsurprisingly given the tightening of domestic supply, export volumes have declined in recent years. That said, and 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 44,282 MT in CY2005. This marked a decrease of 28 percent year on year and volumes have again fallen back marginally in the first half of CY2006. France continues to be the number one export market for Scottish salmon with the U.S. the key third country destination.

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. Total UK imports of canned salmon fell 12 percent in CY2005. Shipments from the U.S. were down 20 percent according to trade data, giving the U.S. a 64 percent share of the UK canned salmon market and generating BPS 33.9 (US $63.8) million 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. Indeed, Canadian exports to the UK rose in CY2005 which may go part way to addressing the recorded drop in the U.S. number.

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 (US $919) million. 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. Imports from the UK amount to just over BPS 1.23 (US $2.3) million, while product traded in the other direction is even less. That said, CY2005 did see a surge in U.S. whole/eviscerated groundfish exports, mainly cod, to the UK albeit to just 378 MT. Despite the overall increase in UK demersal landings, imports of whole/eviscerated groundfish increased in CY2005 to 94,882 MT. Imports are expected to increase marginally in the current year.

Exports of whole/eviscerated groundfish grew by 18 percent in CY2005. Of the 34,938 MT exported, nearly half was shipped to China. China has effectively replaced France 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 CY2005 to 131,905 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 over 13 percent and totaled BPS 386.5 (US $726.7) million in CY2005.

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 and Norway consistently exporting over 10,000 MT of groundfish fillets to the UK. 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.

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 CY2005. Volume increased by nearly 18 percent to 9,154 MT, generating export revenue of BPS 13.4 million (US $25.1) for U.S. shippers.

Following the large increase in UK exports of groundfish fillets in CY2003 which was maintained through CY2004, CY2005 saw a 17 percent decline in the export volume. That said, the value of those same exports rose over 40 percent. The majority of shipments were again destined for other EU member states. Shipments have continued to decline so far in CY2006 and full year exports are expected to be further down on CY2005. In particular, trade data indicates that transshipment of frozen Alaska Pollack fillets through the UK, which fell sharply in CY2005, have virtually halted in CY2006.

SECTION II: STATISTICAL TABLES

Table 1 - UK Wild Catch, Landings by UK Vessels in the UK, 2002 - 2005

Landings by UK Vessels in the UK					
Quantity (metric tonnes)					
	2002	**2003**	**2004**	**2005**	**% change 2005-2004**
Cod	25724	15504	15184	13759	-9.4
Dogfish	5781	6512	4638	2785	-40.0
Haddock	51874	40659	45384	47342	4.3
Hake	2075	1937	2219	2586	16.5
Lemon Sole	2323	2195	2065	2157	4.5
Anglerfish	13119	10120	10786	12573	16.6
Plaice	5939	4364	3496	3294	-5.8
Saithe (coley)	9888	8481	8995	11391	26.6
Sole	2140	2260	1993	1786	-10.4
Whiting	11430	8161	7399	8802	19.0
Other Demersal	47776	43023	53496	51081	-4.5
Total Demersal	**178069**	**143216**	**155655**	**157556**	1.2
Herring	42466	55248	56214	73781	31.3
Mackerel	96609	106468	115299	94084	-18.4
Other Pelagic	17731	10332	8059	12389	53.7
Total Pelagic	**156806**	**172048**	**179572**	**180254**	0.4
Crabs	23261	22996	20417	19115	-6.4
Nephrops	28382	27599	30317	33571	10.7
Other Shellfish	79106	75319	71751	69753	-2.8
Total Shellfish	**130749**	**125914**	**122485**	**122439**	0.0
TOTAL	**465624**	**441178**	**457712**	**460249**	0.6

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

Table 2 – Total Edible Fish, Import Matrix

Import Trade Matrix			
Country	United Kingdom		
Commodity	Total Edible Fish		
Time Period	CY	Units:	MT
Imports for:	2004		**2005**
U.S.	32336	U.S.	32134
Others		Others	
Iceland	90940	Iceland	93389
Faroe Islands	52807	Faroe Islands	54675
Denmark	47868	Denmark	51745
Norway	39439	Russia	45293
Russia	33866	Norway	44018
Seychelles	29557	China	29511
Mauritius	28419	Thailand	29081
Thailand	26977	Seychelles	28852
Ireland	26740	Germany	28437
China	26698	Ireland	25630
Total for Others	403311		430631
Others not Listed	233180		255366

Table 3 – Total Edible Fish, Export Matrix

Export Trade Matrix			
Country	United Kingdom		
Commodity	Total Edible Fish		
Time Period	CY	Units:	MT
Exports for:	2004		**2005**
U.S.	11898	U.S.	7217
Others		Others	
France	98790	France	100536
Russia	48966	Netherlands	70110
Spain	47150	Spain	41972
Netherlands	43100	Germany	37019
Germany	36375	Ireland	34872
Ireland	31510	Russia	27458
Nigeria	20523	China	22990
Italy	20484	Italy	21799
China	17462	Denmark	17557
Portugal	11857	Nigeria	14584
Total for Others	376217		388897
Others not Listed	88812		64548

Table 4 - Salmon and Salmon Products, Import Matrix

Country	United Kingdom		
Commodity	Salmon, Whole/Eviscerated		
Time Period	CY	Units:	MT
Imports for:	2004		**2005**
U.S.	850	U.S.	1400
Others		Others	
Norway	7978	Norway	14870
China	2092	Faroe Islands	3376
Faroe Islands	2009	China	2485
Denmark	1507	Denmark	1646
Ireland	752	Germany	1418
Germany	598	Sweden	1273
Chile	403	Chile	1155
Netherlands	160	Iceland	932
France	113	Ireland	478
Belgium	98	France	327
Total for Others	15710		27960
Others not Listed	234		598
Grand Total	16794		29958

Table 5 - Salmon and Salmon Products, Export Matrix

Country	United Kingdom		
Commodity	Salmon, Whole/Eviscerated		
Time Period	CY	Units:	MT
Exports for:	2004		**2005**
U.S.	9541	U.S.	5351
Others		Others	
France	30696	France	24859
Germany	3770	Ireland	3855
Spain	3024	Germany	2012
Ireland	2946	Japan	1196
Belgium	2078	Russia	1107
Japan	1910	Spain	848
Denmark	1497	Netherlands	839
Netherlands	1002	Denmark	729
China	766	Belgium	613
Poland	668	Estonia	407
Total for Others	48357		36465
Others not Listed	3445		2466
Grand Total	61343		44282

Table 6 - Salmon Canned, Import Matrix

Country	United Kingdom		
Commodity	Salmon, Canned		
Time Period	CY	Units:	MT
Imports for:	2004		**2005**
U.S.	18901	U.S.	15084
Others		Others	
Canada	6351	Canada	6916
Chile	610	Germany	440
Germany	395	Chile	379
Thailand	394	China	329
France	74	Thailand	237
South Korea	58	Denmark	76
Netherlands	42	Spain	51
Spain	26	France	31
China	16	Italy	15
Indonesia	15	Belgium	11
Total for Others	7981		8485
Others not Listed	23		18
Grand Total	26905		23587

Table 7 - Salmon Canned, Export Matrix

Country	United Kingdom		
Commodity	Salmon, Canned		
Time Period	CY	Units:	MT
Exports for:	2004		**2005**
U.S.	56	U.S.	0
Others		Others	
Ireland	494	Ireland	583
Canada	36	France	62
Netherlands	33	Hong Kong	20
Hong Kong	33	Australia	14
Norway	22	Netherlands	13
France	18	Spain	7
Chile	18	Germany	7
Germany	12	Canada	6
Thailand	12	Thailand	6
Malta	11	Colombia	6
Total for Others	689		724
Others not Listed	96		56
Grand Total	841		780

Table 8 - Groundfish Whole/Eviscerated, Import Matrix

Country	United Kingdom		
Commodity	Groundfish, Whole/Eviscerated		
Time Period	CY	Units:	MT
Imports for:	2004		**2005**
U.S.	41	U.S.	378
Others		Others	
Faroe Islands	25706	Russia	34264
Russia	25368	Iceland	26585
Iceland	24826	Faroe Islands	23625
Norway	6577	Norway	4761
Ireland	2290	Ireland	1604
Denmark	1862	Denmark	1491
Germany	1024	Netherlands	883
France	861	Germany	630
Sweden	524	Cyprus	127
Belgium	160	Portugal	120
Total for Others	89198		94090
Others not Listed	417		414
Grand Total	89656		94882

Table 9 - Groundfish Whole/Eviscerated, Export Matrix

Country	United Kingdom		
Commodity	Groundfish, Whole/Eviscerated		
Time Period	CY	Units:	MT
Exports for:	2004		**2005**
U.S.	282	U.S.	378
Others		Others	
China	11296	China	16259
France	7853	France	10410
Portugal	3004	Spain	2546
Spain	2919	Portugal	2265
Norway	1358	Ireland	729
Denmark	899	Canada	642
Hong Kong	453	Hong Kong	416
Ireland	403	Netherlands	249
Netherlands	356	Switzerland	177
Canada	332	Bermuda	177
Total for Others	28873		33870
Others not Listed	385		690
Grand Total	29540		34938

Table 10 - Groundfish Fillets, Import Matrix

Country	United Kingdom		
Commodity	Groundfish, Fillets		
Time Period	CY	Units:	MT
Imports for:	2004		**2005**
U.S.	7751	U.S.	9154
Others		Others	
Iceland	32040	Iceland	31406
China	22273	China	22283
Denmark	20652	Denmark	20218
Norway	14506	Norway	14583
Faroe Islands	10849	Russia	10780
Russia	7992	Faroe Islands	9391
Germany	7055	Germany	5810
Poland	1686	Spain	2038
Spain	1172	Greenland	1325
Canada	929	Poland	1293
Total for Others	119154		119127
Others not Listed	3259		3624
Grand Total	130164		131905

Table 11 - Groundfish Fillets, Export Matrix

Country	United Kingdom		
Commodity	Groundfish, Fillets		
Time Period	CY	Units:	MT
Exports for:	2004		**2005**
U.S.	629	U.S.	667
Others		Others	
Germany	11164	Ireland	9571
Ireland	6939	Germany	4615
France	3945	France	3980
Spain	1018	Belgium	1395
Thailand	714	Spain	1279
Norway	492	Norway	171
Netherlands	439	Netherlands	146
Belgium	405	Greece	117
China	291	Denmark	111
Denmark	273	Portugal	99
Total for Others	25680		21484
Others not Listed	757		343
Grand Total	27066		22494