

UNITED KINGDOM

The domestic fishery in the United Kingdom produces two thirds of total consumption. In addition, the domestic fishery provides income and employment to a number of people in many local ports, especially in the south west and on the east coast. By the end of 1988, the United Kingdom had a total of 7,767 vessels in the domestic fishery fleet, with 2,334 of those vessels based in Scotland. In the past, the domestic fishery has been adversely affected by the extension of territorial waters by other European nations, in addition to the consequences which has been created by overfishing in the area.

Canadian exporters sold \$110 million worth of fish, shellfish and products to the United Kingdom in 1988. More than half of that amount (\$61 million) was canned salmon, and sockeye accounting for the major part of the total. Canadian cod sales to the United Kingdom in 1988 were approximately \$19 million. The major forms were fillet and minced-blocks for further processing and skin-on fillet. The United Kingdom fish processing industry is very dependant on imported cod, with Iceland, Norway and Denmark being the main suppliers.

There is also a market for frozen salmon, largely for use in the smoking trade, with some \$5 million of sales from Canada in 1988. However, this fish is facing growing competition because of the increased availability of farmed fish from Norway and Scotland. By contrast, there is a minimal market for Canadian smoked salmon because the duty levels are relatively high and there is a consumer preference for the locally smoked product. Frozen crab sales are significant (\$7 million in 1988) and the Canadian trade in lobster was worth \$6 million in 1988, with live sales reaching \$4 million. The live lobster market is growing rapidly, albeit from a small base. In addition, approximately \$2.5 million worth of shrimp entered the United Kingdom from Canada in 1988. The United Kingdom is the biggest market in the world for cooked and peeled shrimp, but product in this category faces a high duty, whereas product from certain other non EEC countries enjoy preferential terms of access.

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Products: salmon