

# UK SECTOR PROFILES

A series of sector profiles on the United Kingdom has been prepared by the Canadian High Commission in London. The first in the series was reprinted in *CanadExport*, Vol. 8, No. 9, May 15, 1990. The sixth in the series is reprinted here.



## Fish and Shellfish

### Market Facts

Canadian fish, shellfish and related products — valued at \$110 million — were sold to the UK in 1988. More than half (\$61 million) consisted of canned salmon, primarily sockeye. Most canned salmon is sold to three companies — John West, Princes Foods and S & W Berisford.

Canadian cod sales to the UK in 1988 amounted to \$19 million, the major portions being fillet and minced-blocks (for further processing) and skin-on fillet. The UK fish processing industry is very dependant on imported cod, with Iceland, Norway and Denmark being the main suppliers.

A market — Canadian exports were \$5 million in 1988 — also exists for frozen salmon, largely for use in the smoking trade. This sector faces growing competition because of the increased availability of farmed fish from Norway and Scotland. The market for Canadian smoked salmon is minimal because the duty levels are relatively high and the preference is for the local type of smoking.

Frozen crab sales are significant (\$7 million in 1988). In the same year, Canadian trade in lobster was valued at \$6 million, with sales of live lobster totalling \$4 million. The live lobster market, though small, is growing rapidly.

Canadian lobster sales to the UK are mainly in the October-May period when locally caught Scottish lobster is scarce. The Scottish product sells at a higher price because of local preference.

Canadian shrimp, worth approximately \$2.5 million, entered the UK in 1988. The UK is the world's largest market for cooked

and peeled shrimp. Products in this category, however, face high duties, while those from certain other non-EEC countries have preferred access.

A small market exists for a variety of other fish and shellfish, including large-size herring, monkfish tails, Atlantic halibut, roe-on scallops, dogfish backs, and live shellfish.

### Duty Levels

Levels of duty vary considerably between products but, in general, the more processed the product, the higher the duty. As of January 1990 the following rates applied:

- Canned Salmon (5.5%)
- Cod: (whole or headless) (12.0% max.)
  - fillet, fresh (18.0% max.)
  - fillet frozen (15.0% max.)
  - minced fresh (15.0% max.)
  - minced blocks frozen (12.0% max.)

There is a GATT-bound quota into the whole EEC of 8% for 10,000t for frozen cod fillets. Since 1987 there have also been autonomous tariff reductions for certain fish for further processing. In the UK, whole cod is the category of interest. This year there is an EEC-wide quota for 40,000t for whole cod at 3.7%.

- Frozen Salmon (2%)
- Smoked Salmon (13%)
- Frozen Snow crab (8%)
- Shrimp (*Pandalus borealis*) unpeeled (12%)
- Shrimp (*Pandalus borealis*) cooked and peeled (20%)
- Whole frozen lobster (8%)
- Frozen lobster (other) (8%)
- Live lobster (8%)
- Herring (Free Feb. 15-June 15)
- Herring (15 % June 16-Feb. 14)

### Trade Promotion Events

The International Food Exhibition (IFE) takes place biannually. The next event, April 1991, is in London. There is also an annual Chilled and Frozen Food show at the National Exhibition Centre, Birmingham, which takes place every May.

A new trade show, Fish Trades, started in 1988. The 1990 event was held in November.

### Sources of Information

Commercial/Economic Division  
Canadian High Commission  
1 Grosvenor Square  
London, England W1X 0AB  
Tel.: 01-629 9492  
Fax: 01-491 3968  
Telex: 261592 CDALDN G

### Publications

Fish Trader, Retail Journals Ltd.,  
Queensway, Redhill, Surrey RH1 1QS  
Tel.: 0737-768611  
Telex: 94669 TOP JNL G

Seafood International,  
AGB Heighway Ltd., Cloister Court,  
22-26 Farrington Lane,  
London EC1R 3AU  
Tel.: 01-253-3456  
Telex: 21977 SYSMAG  
Fax: 01-250-3343  
(Also publishes Seafood News).

The Grocer, William Reed Ltd.,  
5-7 Southwark Street,  
London SE1 1RQ  
Tel.: 01-407-6981  
Telex: 8812648  
Fax: 01-378-6781

Frozen and Chilled Foods,  
Retail Journals Ltd.,  
Queensway House, 2 Queensway,  
Surrey RH1 1QS  
Tel.: 0737 768611  
Telex: 948669 TOPJNL G

Foodnews, 22a Sidcup High Street  
Sidcup, Kent DA14 6TH  
Tel.: 01-300 786415  
Telex: 8954109 FN LDNG  
Fax: 01-302 547264

### Associations

UK Association of Frozen Food Producers, 1 Green Street,  
Grosvenor Square, London W1Y 3RG  
Tel.: 01-629-0655

British Association of Canned & Preserved Food Importers & Distributors (BACFID), 15-16 Dufferin Street,  
London EC1Y 8PD

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