

## SEAFOOD MARKET IN BRIEF

Britain is an active and mature market for seafood products, but a rewarding market for those Canadian firms who are competitive and persistent in approaching the market with a view towards the long-term. Over half of the fresh and frozen fish reaching the consumer market in the United Kingdom does so through retail sales, with the balance used by the foodservice sector. As with other food sales, the retail sector is becoming increasingly dominated by supermarkets, referred to as multiple retailers. However, traditional fishmongers still play a very important role in wet fish sales. Supermarkets provide for over half the trade in frozen fish, with freezer centres taking slightly less than 20%. For fresh fish, fishmongers have close to half the trade and supermarkets about one-quarter, with all other users providing the remaining 25% demand.

There are five major supermarket groups: Sainsbury, Tesco, Asda, Gateway and the Argyll group which incorporates Safeway. Supermarkets represent very powerful buyers as they account for over 80% of all food expenditures in the United Kingdom. Purchasing is handled centrally, thus making it difficult for firms other than large suppliers to service their requirements directly. However, some fresh chinook salmon suppliers from British Columbia have made significant direct sales to the British market without the use of an agent, but in general most purchasing is handled centrally.

In addition to dockside wholesale fish markets, there are inland fish markets with the most notable being Billingsgate in London. Independent retailers such as fishmongers, proprietors of market stalls, and mobile sales vans, all purchase directly from local markets, but the supermarkets do so only to a limited extent. Restaurants are the other main customers of wholesale markets, especially Billingsgate. However, there are a number of specialty companies based outside the markets who deliver fresh and frozen fish to foodservice outlets. Higher prices may sometimes be obtained by exporters by selling to these specialty firms rather than through intermediary fish traders.

The consumer market is the fastest growing sector of the UK fish market largely due to the changes in eating habits. An important factor affecting seafood sales to the UK is consumer perception of the health benefits from eating fish. A small but growing proportion of the UK population has chosen a "semi-vegetarian" diet which excludes red meat, but includes fish and chicken. This trend is much talked about in the upper socio-economic classes with the gains largely realized in the catering sector. The perception of fish as a health food has led to its more frequent inclusion in the diet of many middle- and upper-class families. At all ends of the market, tastes remain loyal to traditional species like cod, haddock, sole and plaice, but, there is a growing willingness to consume a greater variety of seafood species. Due to increases in price for traditional species, international travel and foreign influences generally, there is a more diversified approach to seafood preparation in the home. These trends are also noticeable throughout the restaurant trade, especially in the more affluent southern and eastern areas of the United Kingdom. Consumers are offered a wide selection of imported seafood species in restaurants and this has influenced demand for imported products.