UK Market Summary & Category Data for Fish & Seafood - Barramundi

January 2024

Seafood Industry Australia
The Voice of Australian Seafood

GREAT AUSTRALIAN SEAFOOD

About Seafood Industry Australia

Seafood Industry Australia (SIA) is the national peak-body representing the Australian seafood industry as a whole. With members from the wildcatch, aquaculture and post-harvest sectors of the Australian seafood industry, we are the voice of Australian seafood.

SIA provides consumers, Government and other stakeholders with confident and united representation. Our unity indicates that we love what we do, we stand by our products and that those products are the best in the world.

SIA provides services identified through a process involving member input to fill a critical gap that currently exists, to have more influence on Government decisions, to act as a national industry voice, to be a marketing and communications hub, and to remove obstacles to growth standing in the way of the Australian seafood industry.

Our vision is for the Australian seafood industry to be United, Effective and Respected.

Our mission is to Promote, Protect and Develop the Australian seafood industry on the national and international level.

Agricultural Trade and Market Access Cooperation (ATMAC) Program

The ATMAC program is an Australian Government initiative, expanding trade in Australian agricultural, forestry and fisheries sectors into emerging export markets and/or export markets with high-growth potential. This will be achieved through support for diversification efforts that align with industry priorities.

Seafood Industry Australia's 'marketing, market access and export development for the Australian seafood industry' was funded under the ATMAC Program.

Economic Indicators

- GDP (USD): **$3.33 trillion** as of January 2024.
- GDP per capita (USD): **$52,430** as of December 2023.
- Currency: **Pound Sterling** (GBP).
- Exchange Rate: **1 GBP = 1.94 AUD** (05/02/24).
- Mercer’s 2023 Quality of Living Ranking: The UK’s highest-ranking city is **London at 45**, followed by **Aberdeen at 49** and **Edinburgh at 51**.
- Human Development Index: **0.929** and ranked **18th** as of 2021.
- Logistics Performance Index: **3.70** and ranked **19th** globally as of 2023.

Source: Trading Economics, World Bank, Mercer, DFAT

- **Trade Agreements:**
  - The UK has more than 100 Bilateral Investment Treaties in force or signed with its partner countries.
  - The UK is also a party to the newly signed EU - United Kingdom Trade and Cooperation Agreement and the Central America - United Kingdom Association Agreement.

Source: https://investmentpolicy.unctad.org/country-navigator

Demographic Indicators

- Total Population: Approximately **67.96 million** as of January 2024.
- Expatriate Population: Approximately **9.5 million** as of 2022 as per the Migration Observatory.
- Population Growth: **0.34%** as of 2023.
- Median Age: Approximately **40.60** years old.
- Urban Population: **84.4%** as of 2023.
- **Population Ethnicity:**
  - 86% White
  - 7.5% Asian
  - 3.3% Black
  - 3.2% Other (Mixed, Arabic)
- **Dominant Religious Groups:**
  - 59.1% Christian
  - 25.1% No religion
  - 4.8% Muslim
  - 11% Other (Hindu, Sikh, Jewish, Buddhist)

Source: Trading Economics, World Bank, Statistics Body for individual countries

Consumer Behaviour & Societal Trends

Key Trends:

- Despite a challenging year defined by low rates of economic output, consumer sentiment in the UK is set to slowly rebound back as British shoppers gain confidence in their personal finances.
- COVID-19 has seen a decline in discretionary spending as consumers adapt to tightening budgets. Around 65% of shoppers have reduced spending on non-essential products and 37% of consumers have been seeking cheaper alternatives in 2020 (McKinsey). Similarly, 40% of online shoppers considered clearance websites during the pandemic.
- Consumers in the UK are moving away from brand loyalty due to changing priorities. In 2020, 72% of consumers chose to switch brands in search for better value overall. Availability was also a driving factor for consumers to search for another brand or product.
- 86% of British consumers value convenience when online shopping and 69% prioritise convenience when making physical purchases.
- Responsible consumption is on the rise as consumers seek out brands and products that align with their values. Consumers are choosing to engage more with sustainable or eco-friendly products. A Kantar Smart Shopper study found that 62% of shoppers valued at least one aspect of sustainability (e.g. biodegradable packaging) when purchasing products. Consumers are also increasingly participating in circular economies with eBay recording a 30% growth in second sales during June 2020.
- Healthier eating habits are also influencing consumer preferences with UK shoppers spending an extra 1.4 million pounds on organic products per week in 2020. Meat-free and free-from products are growing in popularity, driven by more health-conscious younger generations.

- British shoppers are more likely to buy products if they believe the brand gooes above and beyond to offer a personalised experience. 25% of consumers prefer brands that make them feel ‘special’ while 70% of UK and US shoppers expect a tailored product experience.

- As Brexit stokes nationalistic sentiments, a percentage of British shoppers are also shifting their product preferences to local brands. 60% of consumers surveyed stated that the origin of the product would be as important as the pricing. Shoppers are also inclined to support local businesses during the pandemic with Waitrose finding that 74% of shoppers would like to see more UK-based businesses.

Source: Nielsen, Mintel, McKinsey, USDA

Digital Adoption:

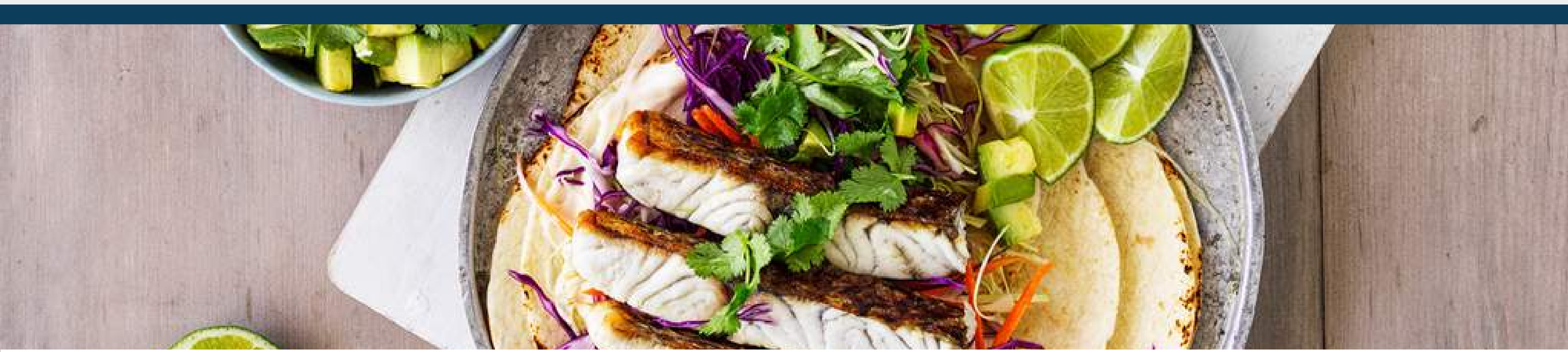
- The British spend on average per day 5 hours 28 minutes on the internet and nearly 2 hours on social media.

- In the UK, there are 65 million internet users on any device with a penetration rate of 96%.

- According to the ‘Digital 2020’ report, 45 million British people are active social media users with a penetration rate of 66%. This is a growth of 2.9% in social media users over the past year.

- Youtube is the most visited social media site at 78%, followed by Facebook at 73%, Whatsapp at 62%, and Facebook Messenger at 58%.

Source: Digital in 2021 Report

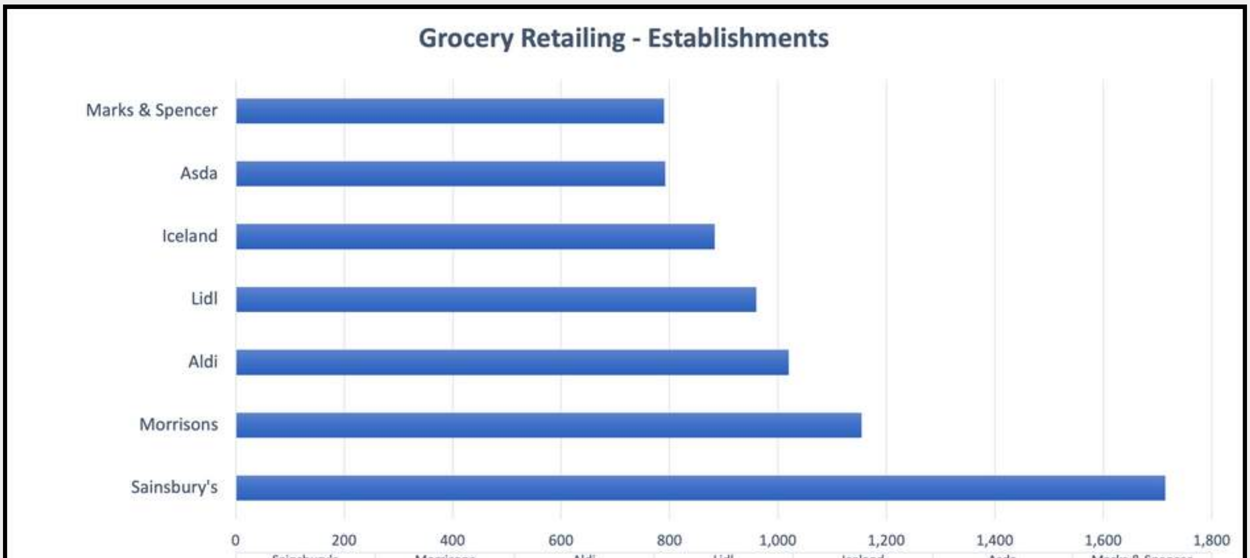


Grocery Retail Channel Developments

Key Trends:

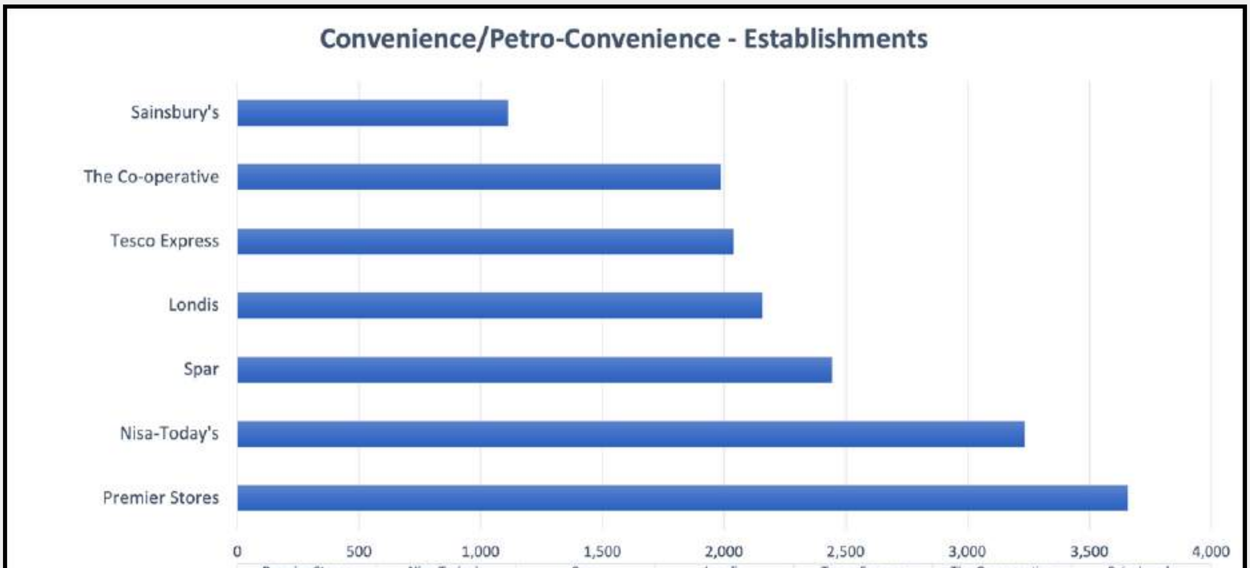
- Total grocery sales grew throughout 2020 as UK consumers flocked to supermarkets. At its height, the sector saw a 20.6% increase in sales during March 2020.
- Convenience stores have experienced accelerated growth rates during COVID-19, accounting for 16.3% of all grocery sales during April 2020. Customers are seeking convenience during uncertain times, choosing to shop locally rather than risk their health and safety by travelling.
- Supermarkets are increasingly adopting an omnichannel approach to maximise customer engagement. 2020 has seen major outlets accelerating the growth of their online platforms to match consumer demand. Collaborations between existing e-commerce retailers and physical stores have also proven to be popular with Amazon Prime launching a partnership with Morrisons, allowing customers to pick up their Amazon Fresh purchases at their local grocery store.
- Government interventions will lead to an increase in supermarket formats that encourage healthier eating habits. Restrictions set to come into force in 2022 will prevent supermarkets from displaying unhealthy food or drinks at checkouts or at the entrances of stores. The People's Supermarket and Planet Organic, which house organic products, are some of the independent stores establishing their presence in the health food market.
- The biggest strategy for grocery retailers currently is to maximise store safety by adhering to hygiene recommendations. Outlets are also reducing prices to increase customer retention.
- Discount stores are on the rise as Aldi and Lidl increase the pressure on traditional supermarkets to offer more value to their customers.

Grocery Retailing Brand Outlets:



	Sainsbury's	Morrisons	Aldi	Lidl	Iceland	Asda	Marks & Spencer
Outlets	1,714	1,154	1,020	960	883	792	790

Convenience/Petro-Convenience Brand Outlets:



	Premier Stores	Nisa-Today's	Spar	Londis	Tesco Express	The Co-operative	Sainsbury's
Outlets	3,657	3,233	2,444	2,156	2,036	1,985	1,113

Source: Euromonitor

Foodservice Channel Developments

Key Trends:

- 2020 has been a challenging year for both limited-service and full-service restaurants with the pandemic forcing closures and leaving outlets with uncertain futures. However, the UK government has continued to provide support to the hospitality industry with grants, loans and the implementation of a "Eat out to help out" scheme.

- Restaurants have responded to restrictions by reconfiguring their business models to encompass home delivery, either through in-house delivery or through third-party platforms like Uber Eats or Deliveroo. 2020 has seen a 21% growth in online delivery revenue as consumers increase their engagement with food delivery services.

- Evidence from consumer expenditure data shows that UK restaurant spending by households in April and May 2020 was 30% of its total in the same months of 2019 (Surico et al, 2020).

- Increasingly, restaurants are enhancing their digital systems by integrating QR code menus, mobile ordering, and other remote ordering options to meet consumer demand for convenience during COVID-19. This trend is also increasing amongst limited-service restaurant chains as consumers express discomfort at using touchscreen ordering systems during the pandemic.

- As a result of disruptions to physical services, full-service restaurants have also been offering innovative products to stay afloat. Dishoom targeted DIYers by selling cocktail kits while Mother Kelly rolled out Christmas hampers containing craft beers.

- Brexit is also likely to see restaurants shift towards using more home-grown produce as imported goods face new tariffs.

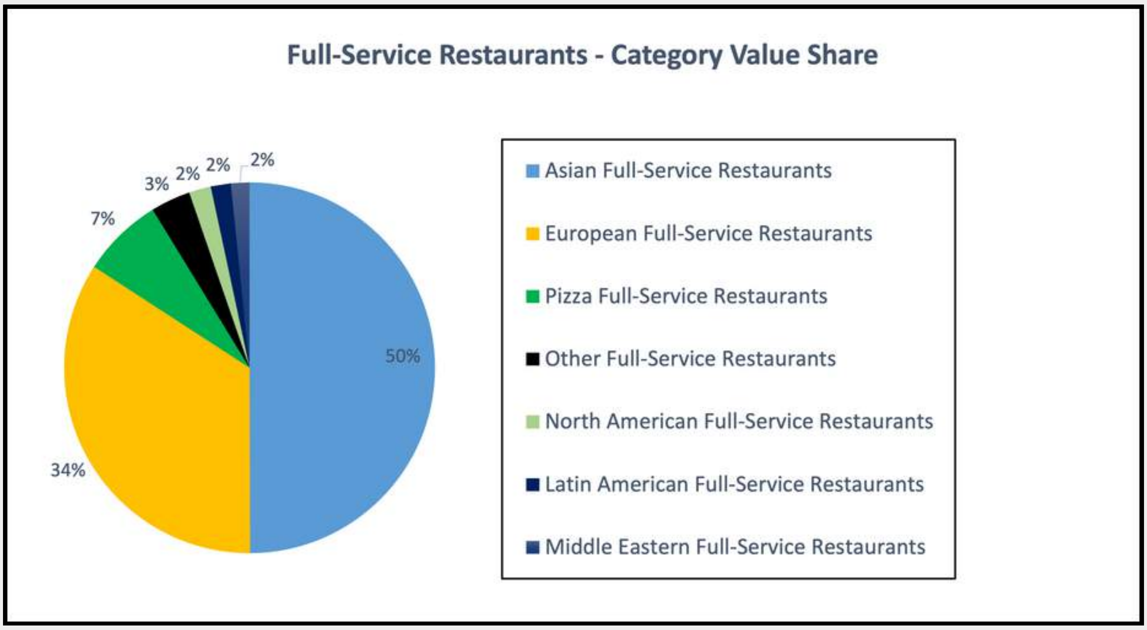
- As demand for food delivery grows, Dark/Cloud kitchens have increased in popularity. These portable kitchens can service multiple operators at a time and are designed especially for businesses to minimise costs when offering food delivery.

- When COVID-19 restrictions ease, alternate foodservice formats are likely to increase in number as consumers seek out enhanced dining experiences. Food halls, which house specialty restaurants under one roof, are set to continue to become fashionable as will pop-up restaurants like at 10 Heddon St, Mayfair.

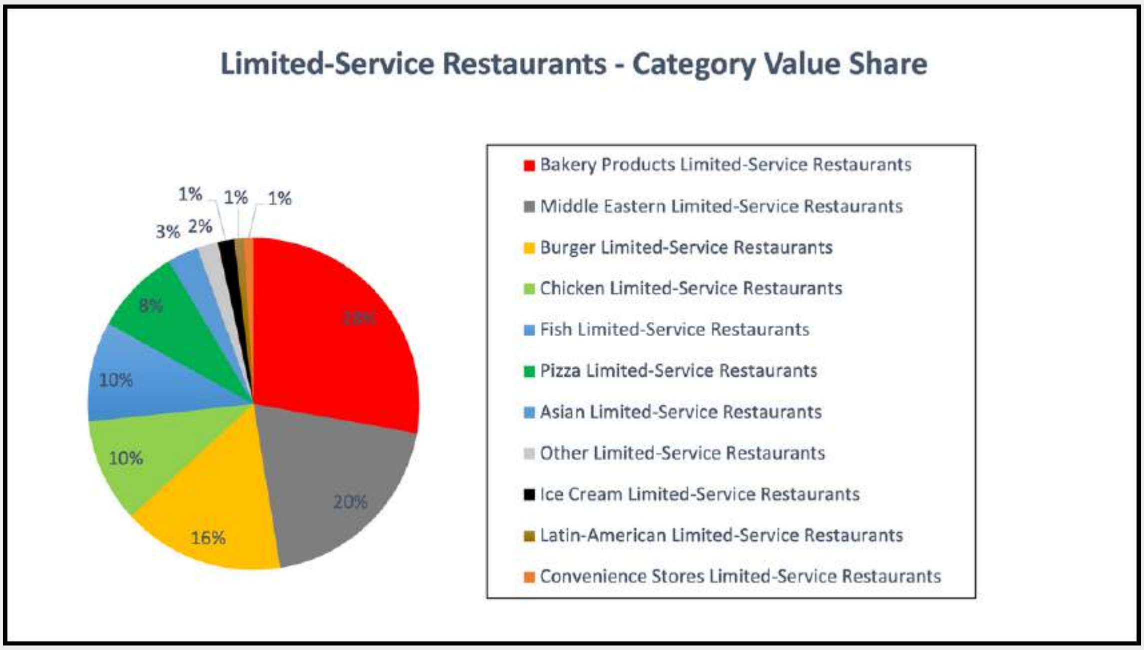
- Healthier food options will populate limited-service and full-service restaurants menus more and more. Vegan, vegetarian and gluten-free menu items are increasingly requested by consumers, as are organic and natural ingredients.

- Asian full-service restaurants dominate the sector, followed by European full-service restaurants. The growth in popularity of international cuisine is unsurprising as a Sacla survey found that 70% of British adults rated an international food choice as their favourite cuisine.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor

Food & Drink e-Commerce Channel Developments

Key Trends:

- Food & Drink e-commerce has experienced substantial growth across 2020. In June, online sales rose by 91% and a predicted 20% of all British shoppers were using e-commerce platforms for their groceries.
- Major supermarkets like Tesco, Asda and Iceland have turned towards optimising their existing online operations to match the surge in consumer demand. Companies have implemented strategies such as 1-hour delivery times, customer rewards and 1 pound delivery fees in a bid to attract more customers.
- However, supermarket chains have found it hard to keep up with the hike in demand. Waitrose opened a new warehouse, allowing the chain to double its online deliveries while other chains have increased staff hires and "dark store" locations.
- Sustainability still remains a priority for some online grocery retailers with Sainsbury's introducing eco-friendly green slots to urge customers to share delivery slots with other people in their area.
- COVID-19 has seen food wholesalers shift towards direct-to-consumer strategies by setting up online ordering platforms. Brakes launched a 'Food Shop' service while The Sausage man, a German wholesaler, set up a 24-hour online shopping service without a minimum order requirement.
- Meal kits and recipe boxes have risen exponentially in popularity during 2020. Mindful Chef, a UK based recipe box company, saw a 452% increase in customer numbers and a 387% increase in frozen meal sales. Similarly, HelloFresh struggled to keep up with consumer demand as interest in food subscription boxes hit record highs.
- Online alcohol sales have also been steadily rising during lockdown with consumers stocking up on beer, spirits and wine. In March 2020, Master of Malt, an online beverage company, recorded nearly a 200% increase in online orders. In the same month, spirit sales grew by 23% in comparison to the same time a year ago.

Key E-tailers:

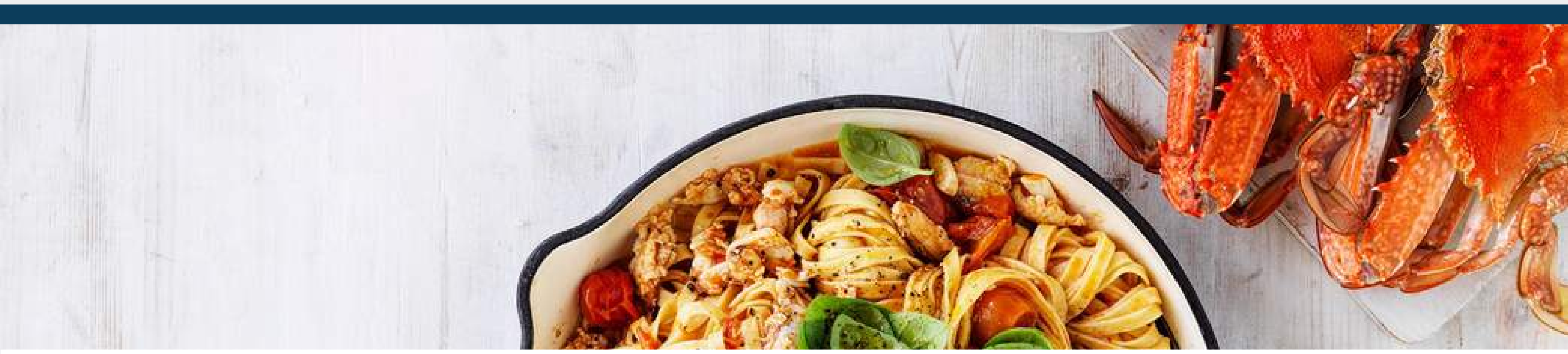
- Ocado is the UK's largest online-only supermarket. Recently, the platform has partnered with Marks & Spencers to offer customers access to a wide range of premium products.
- Amazon Fresh is also a popular choice for online grocery shoppers.
- Most major brick and mortar supermarket chains are all offering online grocery shopping services. The most popular e-commerce platforms include Tesco, Sainsbury's, Waitrose and Morrisons.

Source: Euromonitor

Seafood Consumption in the UK

- Fish and seafood supply per person in the UK is valued at 19.73 kg as of 2017 according to the United Nations Food and Agricultural Organization (FAO).
    - *Food supply is defined as food available for human consumption. At country level, it is calculated as the food remaining for human use after deduction of all non-food utilizations*

Source: FAO, 2021



Market Access Requirements

Key Regulators:

- Department for Environment, Food & Rural Affairs (Defra)
- Food Standards Agency (FSA)

Product Registration/Import Procedure:

- The UK is currently undergoing a transitional phase in a post-Brexit reality. Certain regulations are expected to be rolled out in phases throughout 2021. Pre Brexit regulations are as follows:
  - An EORI number is required for importers in the UK.
  - Animal products and live animal imports may require a UK health certificate while certain products like starter cultures will require an import license.
  - The products must also satisfy other specific regulations including labelling and packaging requirements before entry is allowed into the UK market.

Documentation Required:

- Commercial Invoice: Two copies are needed and the invoice must include a clear description of goods, terms of sale, gross and net weights, and the country of origin.
- Bill of Lading: Minimum two copies are required.
- Packing list.
- Certificate of insurance: Useful but not required.

General Labelling Requirements:

- In general, food labels must contain the legal name of the food and use metric units of measurement. Other requirements include:
  - Weight and dimension
  - Country of origin
  - Composition of ingredients
  - Allergen warnings
- However, each food category may have separate requirements that need to be followed (e.g. Fish need to be labelled with the commercial and scientific name, the production method and the catch area).

Packaging Requirements:

- There are no specific packaging requirements. However, if your company qualifies as a 'obligated packaging producer', there are regulations in place to ensure that packaging waste is minimised.

Non-Tariff Barriers:

- Animal products are only able to enter the UK through Designated Points of Entry.
- All imported food and beverage products may also be subject to three levels of consignment checks - documentary, identity and physical inspections. At the port of entry, documentation will be checked to ensure certificates are up to date and match with commercial documents. Labelling and packaging will be checked in the identity stage and a percentage of goods will undergo a physical inspection to ensure the products meet food safety standards.

Tariffs Levied:

- From January 2021, UK Global Tariff rates will apply. The average tariff will be around 5.7%. Exceptions will apply for countries with a UK trade deal, including Australia, or are a part of the UK Generalised Scheme of Preferences.

Source: USDA Food and Agricultural Import Regulations and Standards Country Reports [FAIRS], Austrade, DFAT, Export.gov

Australia and United Kingdom Free Trade Agreement (A-UK FTA)

- The Australia-United Kingdom Free Trade Agreement (A-UKFTA) was signed virtually on 17 December 2021 and will be tabled in both of Australia's Houses of Federal Parliament, with a National Interest Analysis, and considered by the Joint Standing Committee on Treaties (JSCOT).

- JSCOT will table a report on the A-UKFTA including a recommendation as to whether binding treaty action should be taken. Following JSCOT's report, any legislative changes required to implement the treaty domestically must pass both Houses of Parliament.

- Once the domestic procedures have been completed, Australia and the UK will provide each other with confirmation of their completion through an exchange of diplomatic notes, and the agreement will enter into force 30 days later, or on any other date that is mutually agreed.

- For the seafood industry, the A-UK FTA will mean significant market access outcomes including immediate reduction on most Australian seafood.

- On some products such as lobster, crabs, scallops, shrimps, coquilles and aquatic invertebrates, tariffs will be reduced over a staggered period with all categories free of tariffs on 1 January on year four. This is known as staging category 'B4' and items under this category along with the full list of tariffs and their corresponding schedule is available on the DFAT website.

- More information about the A-UK FTA is available on the DFAT website or through the Free Trade Agreement Portal.

Category Data

Fish and Seafood in the UK

Key Trends:

- Even as retail sales increase, this has not been enough to compensate the loss faced by the foodservice and institutional sectors.
- The pandemic and the subsequent impact on total volume sales has impacted the fish and seafood industry with strong declining demand in 2020. With lockdowns being imposed and the consequent closing of restaurants, cafés, pubs and institutions, sales within the foodservice and institutional sectors have nosedived.
- However, as more consumers have been forced to social distance and stay home, at-home cooking has increased, resulting in an increase in retail volume sales, especially during the initial period of panic-buying. This stockpiling led to the retail volume sales of fish and seafood increasing from minimal growth in 2019 to an 8% retail volume growth in 2020. Nevertheless, this increase in retail sales was not enough to compensate for the loss in the foodservice and institutional sectors.
- When the country was first placed under lockdown in March 2020, many consumers made the move to e-commerce so that they could avoid the risk of contracting the virus while shopping at their usual physical stores. This was especially true of older consumers and those who were more vulnerable in terms of health and immunity.
- With the decrease in foodservice and institutional sales and the simultaneous reduction in exports, the demand for fish and seafood was lower as compared to the supply. Multiple fish sellers adapted to the new normal and addressed customer needs by setting up online ordering platforms and home delivery services so that the surplus supply could be sold directly to consumers. This has resulted in a marked increase in the online sales of fish and seafood in 2020.

- It is predicted that due to the economic impact of the pandemic and the resulting instability, consumers will remain sensitive to prices, especially during the early forecast period. Even though fish and seafood are higher in nutritional value, consumers may switch to alternative, cheaper proteins such as eggs, in order to lower expenses. As a result, it is expected that fish and seafood will continue to see a decrease in retail volume sales throughout the forecast period. However, as more consumers return to on-trade establishments, foodservice and institutional volume sales will begin to rise. As a result, the fish and seafood industry is expected to return to pre-pandemic levels seen in 2019 at the end of the forecast period.

- 2020's lockdown periods have increasingly impacted international trade, while simultaneously bringing into focus Britain's reliance on exports for its supply of fish and seafood. As a means of reorienting the domestic market, more British consumers are trying local fish and seafood, which is available at a cheaper price. Taking into consideration the continued impact of Brexit on exports, this trend towards local fish supplies is expected to continue throughout the forecast period.

- In order to boost sales, the government is expected to launch several communication and marketing strategies aimed at highlighting the advantages of local fish and seafood. These are expected to be the sequel to the #SeaForYourself drive of the Department for Environment, Food, and Rural Affairs (Defra) and Seafish, that ran for three months in 2020. This effort focused on educating British consumers on the health benefits and better taste of local products, thereby hoping to increase sales of fish and seafood caught locally, while also providing consumers with cooking advice and how to prepare fish and seafood.

Country	Sector	Category	Segment	Year	Value M USD	5yr CAGR M USD (%)
United Kingdom	Fish & Seafood	Ambient Fish & Seafood	Ambient Fish & Seafood	2022	636.50	3.37
				2027	866.63	6.37
		Chilled Raw Packaged Fish & Seafood - Processed	Chilled Raw Packaged Fish & Seafood - Processed	2022	1,635.82	3.38
				2027	2,264.58	6.72
		Chilled Raw Packaged Fish & Seafood - Whole Cuts	Chilled Raw Packaged Fish & Seafood - Whole Cuts	2022	1,195.19	1.66
				2027	1,525.36	5.00
		Dried Fish & Seafood	Dried Fish & Seafood	2022	11.92	3.06
				2027	16.32	6.48
		Fresh Fish & Seafood (Counter)	Fish	2022	366.41	3.34
				2027	419.51	2.74
			Shellfish	2022	268.85	.88
				2027	330.94	4.24
		Frozen Fish & Seafood	Frozen Processed Fish	2022	981.20	2.35
				2027	1,325.59	6.20
			Frozen Whole Cuts Of Fish & Seafood	2022	351.36	1.86
				2027	442.91	4.74

Source: GlobalData, 2024

ITC - Trade Data

Fresh or Chilled Fish, N.E.S. in UK

UK - Trade Data - HS Code 030289 Fresh or chilled fish, n.e.s. (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 - '22)	Annual Growth in Imported Value % (Long-term '18 - '22)	Annual Growth in Imported Quantity % (Long-term '18 - '22)
-	World	17,157	2,629	-1	-11	-29
1	Sri Lanka	6,664	884	-31	25	17
2	Turkey	2,126	346	66	123	145
3	Faroe Islands	1,716	327	2	-17	-24
4	India	1,637	319	-4	-7	-8
5	France	1,346	115	-	-38	8
6	Mexico	603	28	17,057	-48	-28
7	Ireland	462	85	-59	-44	-45
8	Senegal	443	37	-2	31	26
9	Greece	402	78	-11	-14	-19
10	The Netherlands	261	184	449	12	17

AUS - Trade Data - HS Code 030289 Fresh or chilled fish, n.e.s. (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 - '22)	Annual Growth in Exported Value % (Long-term '18 - '22)	Annual Growth in Exported Quantity % (Long-term '18 - '22)
-	World	2,198	187	-29	-21	-24
1	Italy	1,737	135	-31	-18	-19
2	Hong Kong	95	14	-35	-31	-36
3	Singapore	81	9	1,996	-38	-33
4	New Caledonia	72	6	-25	17	20
5	Vietnam	63	5	-	97	-
6	Thailand	50	4	743	-	-
7	Japan	44	11	-17	-17	-17
8	United Kingdom	17	1	-88	-47	-53
9	Spain	13	1	-87	5	4
10	United Arab Emirates	13	1	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Fish, N.E.S. in UK

UK - Trade Data - HS Code 030389 Frozen fish, n.e.s. (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	46,712	9,923	-18	1	-1
1	Myanmar	10,748	1,457	-35	-2	-11
2	Iceland	5,901	1,812	-18	-5	-2
3	Bangladesh	5,499	955	-39	-2	-3
4	Canada	4,056	218	205	-11	-10
5	India	3,632	879	-15	2	0
6	Turkey	2,767	453	5	142	80
7	China	2,404	693	-30	9	-1
8	Indonesia	2,037	388	2	26	12
9	Argentina	1,878	730	20	6	6
10	Pakistan	1,786	423	-35	34	40

AUS - Trade Data - HS Code 030389 Frozen fish, n.e.s. (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	7,606	2,226	0	1	-5
1	Vietnam	3,895	1,365	-16	-5	-4
2	China	1,216	240	148	24	22
3	South Korea	805	173	-	-12	50
4	Thailand	732	174	354	12	-2
5	Simgapore	264	27	-	-28	-10
6	New Zealand	247	95	-79	62	33
7	United States	146	6	-	39	57
8	Papua New Guinea	103	27	-61	28	-12
9	Fiji	90	104	-58	0	-2
10	India	50	7	-47	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Fillets of Fish, N.E.S. in UK

UK - Trade Data - HS Code 030449 Fresh or chilled fillets of fish, n.e.s. (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 - '22)	Annual Growth in Imported Value % (Long-term '18 - '22)	Annual Growth in Imported Quantity % (Long-term '18 - '22)
-	World	39,497	2,639	2	3	-8
1	Turkey	25,283	1,817	7	77	74
2	Spain	4,073	263	47	17	11
3	Sri Lanka	3,706	208	-22	-4	-10
4	Japan	1,953	76	41	6	0
5	Seychelles	1,144	75	26	31	24
6	The Maldives	1,009	49	-14	-29	-38
7	Australia	533	25	40	15	15
8	France	306	12	14,914	-8	11
9	Greece	289	14	61	181	9
10	Oman	283	29	-25	-27	-36

AUS - Trade Data - HS Code 030449 Fresh or chilled fillets of fish, n.e.s. (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 - '22)	Annual Growth in Exported Value % (Long-term '18 - '22)	Annual Growth in Exported Quantity % (Long-term '18 - '22)
-	World	1,331	68	-8	-2	-1
1	Germany	516	27	-20	-2	0
2	United Kingdom	466	24	13	15	16
3	Spain	228	12	-4	0	0
4	France	80	4	-	-	-
5	Italy	20	1	5	-	-
6	Taiwan	8	0	-	-	-
7	The Philippines	6	0	-	-	-
8	Hong Kong	4	0	-	42	-
9	Vietnam	2	0	-	-	-
10	Brunei	1	0	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Fish Fillets, N.E.S. in UK

UK - Trade Data - HS Code 030489 Frozen fish fillets, n.e.s. (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	87,069	7,799	21	25	21
1	Turkey	78,280	6,502	28	32	31
2	Myanmar	2,048	420	12	180	185
3	China	1,650	285	0	11	4
4	Australia	731	36	-	-	-
5	Vietnam	653	75	605	-20	-20
6	Japan	565	29	-	-	-
7	United States	509	50	122	18	12
8	The Netherlands	485	42	-91	-33	-33
9	Iceland	449	109	320	-18	-22
10	Indonesia	412	44	128	-21	-22

AUS - Trade Data - HS Code 030489 Frozen fish fillets, n.e.s. (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	4,986	382	-66	3	2
1	United States	2,315	155	-46	17	13
2	The Netherlands	1,531	114	-80	-6	-9
3	Sri Lanka	393	47	-	95	99
4	India	369	10	655	-	-
5	Hong Kong	108	7	-55	86	63
6	Vietnam	94	21	5,455	-	-
7	Nauru	85	20	57	23	19
8	Papua New Guinea	68	6	28	-	-
9	Singapore	6	0	-85	-4	-
10	The Philippines	6	0	-31	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Sea Bass, N.E.S. in UK

UK - Trade Data - HS Code 030284 Fresh or chilled sea bass, n.e.s. (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	49,937	7,254	22	1	-6
1	Turkey	36,448	5,455	5	40	35
2	Spain	6,371	911	135	25	31
3	Greece	6,016	787	190	-3	-21
4	France	934	84	25	-1	-13
5	The Netherlands	87	11	-71	-79	-81
6	Ireland	66	4	3	36	-18
7	United Kingdom	7	1	-	-	-
8	Denmark	4	1	-46	-45	-16
9	Italy	2	0	-98	-71	-
10	Portugal	1	0	-	-	-

AUS - Trade Data - HS Code 030284 Fresh or chilled sea bass, n.e.s. (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-						
1						
2						
3						
4						
5	NO DATA AVAILABLE					
6						
7						
8						
9						
10						

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Sea Bass, N.E.S. in UK

UK - Trade Data - HS Code 030384 Frozen sea bass, n.e.s. (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	2,778	413	-67	-14	-14
1	Turkey	2,740	408	-30	-	430
2	Spain	22	2	-	-	-
3	The Netherlands	8	2	-100	-74	-69
4	Pakistan	8	2	541	-	-
5	Saudi Arabia	-	-	-	-	-
6	Qatar	-	-	-	-	-
7	Mali	-	-	-	-	-
8	United States	-	-	-	-	-
9	China	-	-	-	-	-
10	Taiwan	-	-	-	-	-

AUS - Trade Data - HS Code 030384 Frozen sea bass, n.e.s. (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-						
1						
2						
3						
4						
5	NO DATA AVAILABLE					
6						
7						
8						
9						
10						

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Freshwater and Saltwater Fish, N.E.S. in UK

UK - Trade Data - HS Code 030379 Frozen Freshwater and Saltwater (Import):
Fish, n.e.s.

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 - '22)	Annual Growth in Imported Value % (Long-term '18 - '22)	Annual Growth in Imported Quantity % (Long-term '18 - '22)
-						
1						
2						
3						
4						
5	NO DATA AVAILABLE					
6						
7						
8						
9						
10						

AUS - Trade Data - HS Code 030379 Frozen Freshwater and Saltwater (Export):
Fish, n.e.s.

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 - '22)	Annual Growth in Exported Value % (Long-term '18 - '22)	Annual Growth in Exported Quantity % (Long-term '18 - '22)
-						
1						
2						
3						
4						
5	NO DATA AVAILABLE					
6						
7						
8						
9						
10						

Source: ITC Trade Map, 2023

ITC - Trade Data

Fresh or Chilled Nile Perch, N.E.S. in UK

UK - Trade Data - HS Code 030279 Fresh or Chilled Nile Perch, n.e.s. (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	48	6	-	-	-
1	Kenya	48	6	-	-	-
2	France	-	-	-	-	-
3	Ireland	-	-	-	-	-
4	Canada	-	-	-	-	-
5	Ecuador	-	-	-	-	-
6	The Netherlands	-	-	-	-	-
7	Belgium	-	-	-	-	-
8	Bangladesh	-	-	-	-	-
9	Spain	-	-	-	-	-
10	Tanzania	-	-	-	-	-

AUS - Trade Data - HS Code 030279 Fresh or Chilled Nile Perch, n.e.s. (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-						
1						
2						
3						
4						
5				NO DATA AVAILABLE		
6						
7						
8						
9						
10						

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Nile Perch and Snakeheads, N.E.S. in UK

UK - Trade Data - HS Code 030329 Frozen Nile Perch and Snakeheads, (Import): n.e.s.

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	130	36	-80	-21	-15
1	Vietnam	69	22	113	30	24
2	Bangladesh	28	6	-92	-8	-7
3	Myanmar	23	5	-74	-28	-27
4	Romania	6	2	-	-	-
5	Portugal	3	1	-	11	-
6	Croatia	1	0	-	-	-
7	India	-	-	-	-	-
8	Tanzania	-	-	-	-	-
9	Uganda	-	-	-	-	-
10	United States	-	-	-	-	-

AUS - Trade Data - HS Code 030329 Frozen Nile Perch and Snakeheads, (Export): n.e.s.

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	23	2	-92	14	-4
1	Papua New Guinea	23	2	-90	22	-7
2	Thailand	-	-	-	-	-
3	Myanmar	-	-	-	-	-
4	China	-	-	-	-	-
5	Taiwan	-	-	-	-	-
6	Bangladesh	-	-	-	-	-
7	Vietnam	-	-	-	-	-
8	Portugal	-	-	-	-	-
9	Colombia	-	-	-	-	-
10	Cameroon	-	-	-	-	-

Source: ITC Trade Map, 2023

ITC - Trade Data

Frozen Fillets of Nile Perch, N.E.S. in UK

UK - Trade Data - HS Code 030463 Frozen Fillets of Nile Perch, n.e.s. (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tonnes)	Annual Growth in Imported Value % (Short-term '21 – '22)	Annual Growth in Imported Value % (Long-term '18 – '22)	Annual Growth in Imported Quantity % (Long-term '18 – '22)
-	World	12	2	-	-	-
1	Tanzania	12	2	-	-	-
2	Uganda	-	-	-	-	-
3	Vietnam	-	-	-	-	-
4	The Netherlands	-	-	-	-	-
5	Kenya	-	-	-	-	-
6	Belgium	-	-	-	-	-
7	Spain	-	-	-	-	-
8	United Arab Emirates	-	-	-	-	-
9	Germany	-	-	-	-	-
10	Poland	-	-	-	-	-

AUS - Trade Data - HS Code 030463 Frozen Fillets of Nile Perch, n.e.s. (Export):

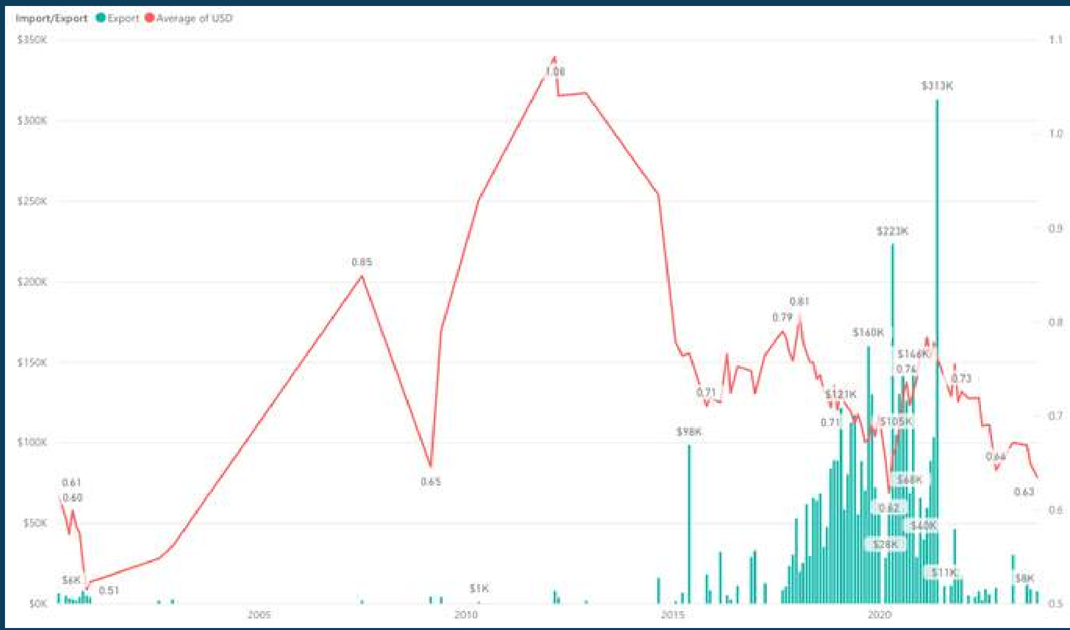
Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tonnes)	Annual Growth in Exported Value % (Short-term '21 – '22)	Annual Growth in Exported Value % (Long-term '18 – '22)	Annual Growth in Exported Quantity % (Long-term '18 – '22)
-	World	2	0	-	-	-
1	Vanuatu	2	0	-	-	-
2	Tanzania	-	-	-	-	-
3	Israel	-	-	-	-	-
4	Romania	-	-	-	-	-
5	Spain	-	-	-	-	-
6	Greece	-	-	-	-	-
7	United Arab Emirates	-	-	-	-	-
8	Italy	-	-	-	-	-
9	The Netherlands	-	-	-	-	-
10	Portugal	-	-	-	-	-

Source: ITC Trade Map, 2023

FRDC - Trade Data

Barramundi Exports - Value

AUS - Trade Data - Species: Nile Perch & Sea Bass (Exports):



Value of Exports - Nile Perch & Sea Bass

Commodity Description	Value
Fresh or chilled Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$3,240,547
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	$609,852
Frozen fillets of Nile perch (Lates niloticus)	$144,419
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	$100,397
Frozen sea bass (Dicentrarchus labrax, Dicentrarchus punctatus) (excl. fillets and other meat of HS 0304 and livers and roes)	$53,848
Fresh or chilled seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	$32,150
Frozen seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	$15,950
Fresh or chilled fillets of Nile Perch (Lates niloticus)	$13,705
Fresh or chilled seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$3,587

Value of Exports - Commodity Breakdown

Country	Value
Korea Republic of	$1,965,958
Korea, Republic of	$1,266,880
Papua New Guinea	$654,622
Vietnam	$138,339
New Zealand	$57,892
Singapore	$40,540
Nauru	$25,054
Solomon Islands	$17,203
China	$15,950
Vanuatu	$7,413
United States of America	$5,590
Germany	$5,270
French Polynesia	$4,792

Leading Export Destinations - Value

State	Value
VIC	$2,702,673
Foreign (re-export)	$772,238
NSW	$615,407
QLD	$120,563
TAS	$1,821
WA	$1,753

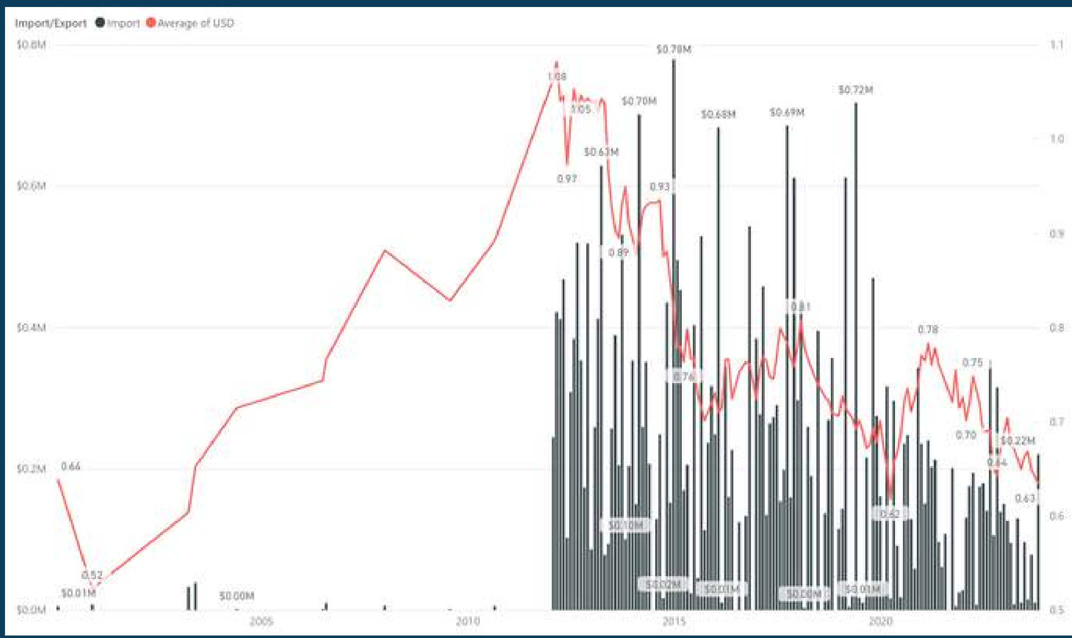
Export Value by State

Source: FRDC, 2023

FRDC - Trade Data

Barramundi Imports - Value

AUS - Trade Data - Species: Nile Perch & Sea Bass (Imports):



Value of Imports - Nile Perch & Sea Bass

Commodity Description	Value
Frozen fillets of Nile perch (Lates niloticus)	$25,326,539
Frozen seabass (Dicentrarchus spp.) (excluding fillets and other meat of HS 0304	$2,459,248
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets	$2,114,930
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	$1,010,270
Fresh or chilled fillets of Nile Perch (Lates niloticus)	$512,853
Fresh or chilled Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	$110,243
Frozen sea bass (Dicentrarchus labrax, Dicentrarchus punctatus) (excl. fillets and other meat of HS 0304 and livers and roes)	$107,464
Fresh or chilled Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl	$50,866
Frozen seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	$13,380
Fresh or chilled seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	$11,128

Value of Imports - Commodity Breakdown

Country	Value
Tanzania	$17,353,986
Kenya	$3,840,768
Taiwan	$3,306,808
Tanzania, United Republic of	$2,855,153
Uganda	$1,743,685
Myanmar	$1,086,218
Vietnam	$900,007
Bangladesh	$193,927
Indonesia	$157,992
Mauritius	$92,627
Korea, Republic of	$67,695
New Zealand	$55,339
South Africa	$21,944
China	$17,602

Leading Import Sources - Value

State	Value
NSW	$14,122,550
QLD	$9,210,045
VIC	$7,072,741
WA	$1,179,328
SA	$132,257

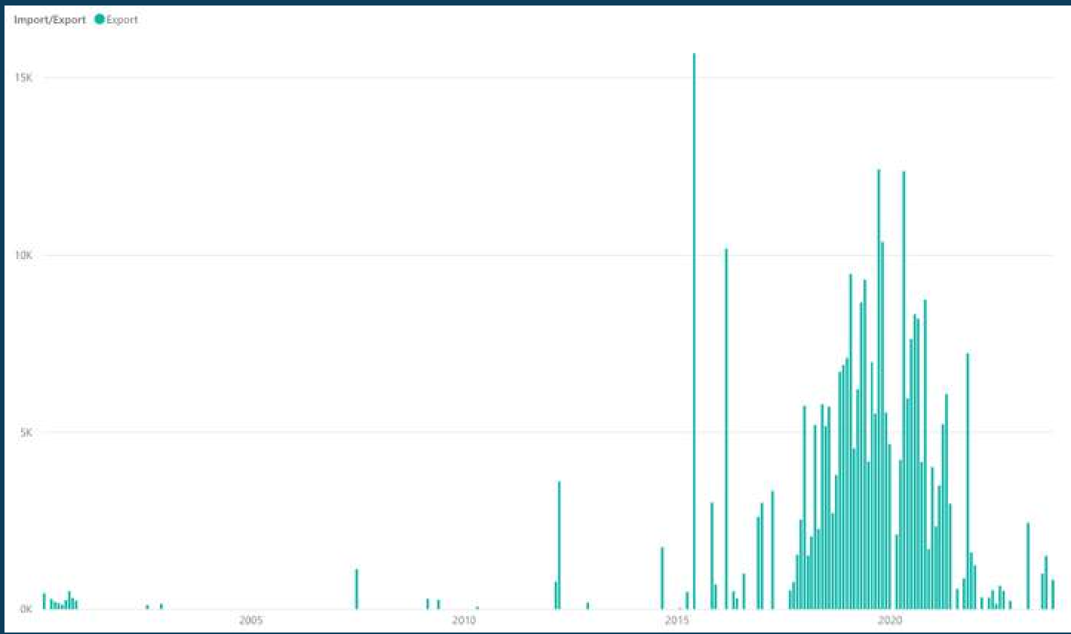
Import Value by State

Source: FRDC, 2023

FRDC - Trade Data

Barramundi Exports - Volume

AUS - Trade Data - Species: Nile Perch & Sea Bass (Exports):



Volume of Exports - Nile Perch & Sea Bass

Commodity Description	Quantity
Fresh or chilled Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	227,526
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	34,362
Frozen fillets of Nile perch (Lates niloticus)	22,773
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	10,490
Fresh or chilled seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	10,171
Frozen sea bass (Dicentrarchus labrax, Dicentrarchus punctatus) (excl. fillets and other meat of HS 0304 and livers and roes)	4,518
Frozen seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	1,740
Fresh or chilled fillets of Nile Perch (Lates niloticus)	668
Fresh or chilled seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	159

Volume of Exports - Commodity Breakdown

Country	Quantity
Korea Republic of	126,228
Korea, Republic of	101,023
Papua New Guinea	38,717
Vietnam	22,368
New Zealand	13,251
Singapore	2,441
Nauru	1,913
China	1,740
Solomon Islands	1,588
Japan	1,125
Vanuatu	627
Germany	340
French Polynesia	320

Leading Export Destinations - Volume

State	Quantity
VIC	199,282
Foreign (re-export)	55,589
NSW	43,993
QLD	12,305
TAS	1,125
WA	113

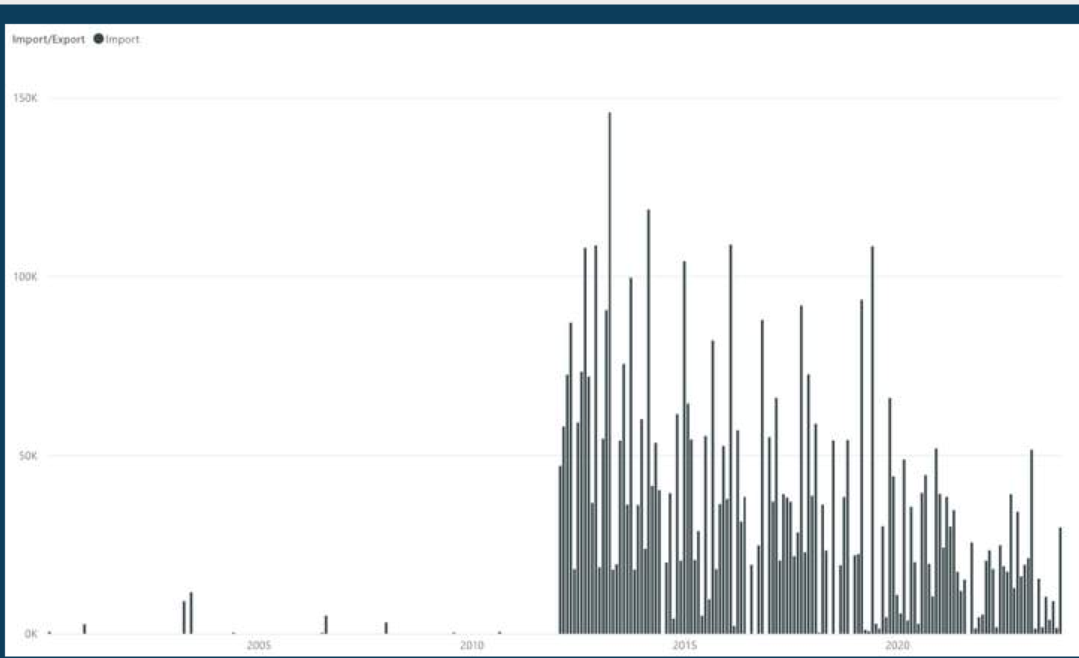
Export Volume by State

Source: FRDC, 2023

FRDC - Trade Data

Barramundi Imports - Volume

AUS - Trade Data - Species: Nile Perch & Sea Bass (Imports):



Volume of Imports - Nile Perch & Sea Bass

Commodity Description	Quantity
Frozen fillets of Nile perch (Lates niloticus)	3,968,755
Frozen seabass (Dicentrarchus spp.) (excluding fillets and other meat of HS 0304	363,486
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets	338,575
Frozen Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	231,593
Fresh or chilled fillets of Nile Perch (Lates niloticus)	76,952
Frozen sea bass (Dicentrarchus labrax, Dicentrarchus punctatus) (excl. fillets and other meat of HS 0304 and livers and roes)	32,691
Fresh or chilled Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	17,218
Fresh or chilled Nile perch (Lates niloticus) and snakeheads (Channa spp.) (excl	7,440
Frozen seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	3,700
Fresh or chilled seabass (Dicentrarchus spp.) (excl. fillets and other meat of HS 0304 and livers and roes)	1,036

Volume of Imports - Commodity Breakdown

Country	Quantity
Tanzania	2,788,919
Taiwan	585,161
Kenya	559,728
Tanzania, United Republic of	402,690
Uganda	288,678
Myanmar	170,110
Vietnam	156,301
Indonesia	29,489
Bangladesh	23,105
Mauritius	12,396
New Zealand	7,586
Korea, Republic of	7,504
South Africa	3,500
Malaysia	2,652
China	2,000

Leading Import Sources - Volume

State	Quantity
NSW	2,201,090
QLD	1,444,277
VIC	1,154,066
WA	222,998
SA	19,015

Import Volume by State

Source: FRDC, 2023

FRDC - Trade Data Sourced from FAO

Food and Agriculture Organization (FAO) Production Volume, Value and Trade - Nile Perch & Barramundi

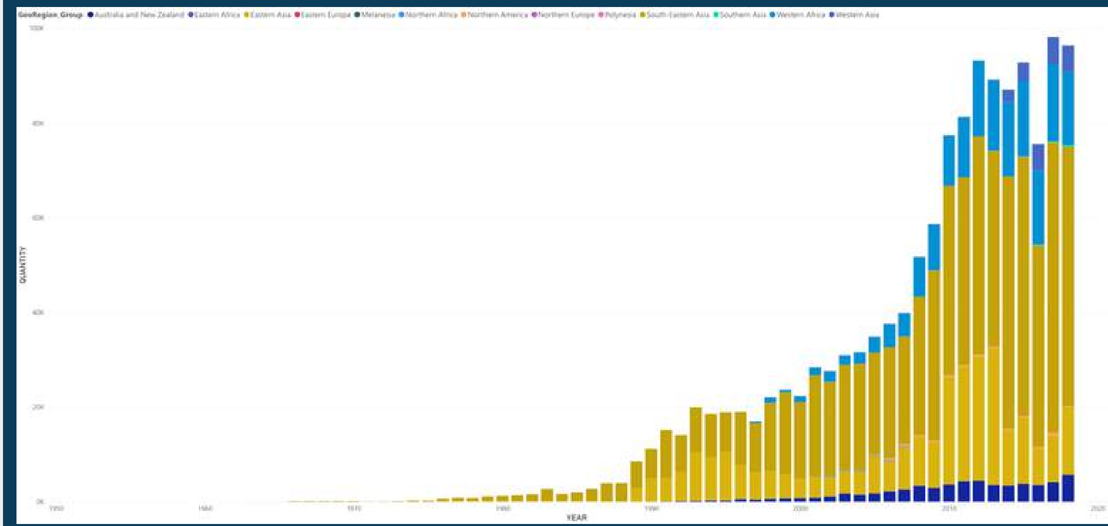
ISSCAAP Species: Marine Fishes not Identified*

**Note: There is no formal category in the ISSCAAP system for Barramundi as of 2023.*

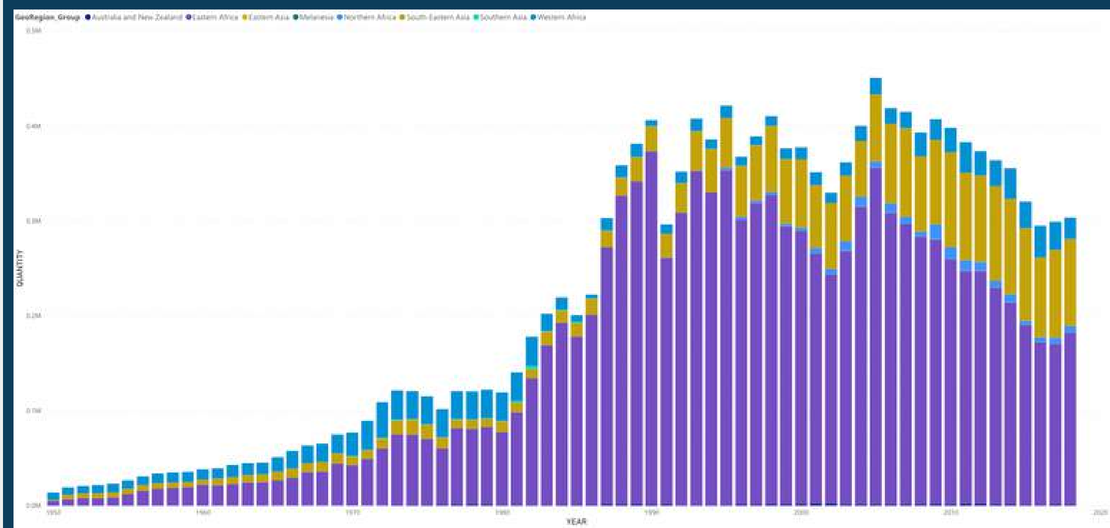
Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes – net product weight	142 214	144 731 E	135 966 E
United Kingdom	Tonnes – net product weight	302 361 E	345 624	352 422

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	527 604	482 039	476 088
United Kingdom	Value (USD 1000)	906 522 E	955 800	897 199

Global Fish Trade Volume & Value by ISSCAAP (International Standard Statistical Classification of Aquatic Animals and Plants) - FAO



Production Volume by GeoRegion - Aquaculture Production - FRDC



Production Volume by GeoRegion - Wild Catch Production - FRDC

Source: FAO, FRDC, 2023

Additional Resources

COUNTRY INSIGHTS

Agriculture and Agri-Food Canada - UK Market Overview

Austrade - UK Market Profile

DFAT - UK Country Brief

DFAT - UK Market Insights

Enterprise Singapore - UK Market Profile

FoodExport - UK Country Profile

HKTDC Research - UK Market Profile

Santandar Trade Markets - UK Market Overview

USDA - UK Exporter Guide

CONSUMER INSIGHTS

Agriculture and Agri-Food Canada - UK Consumer Profile

GWI - UK Consumer Snapshot

Santandar Trade Markets - Reaching the British Consumer

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - UK E-commerce Channel Overview

Agriculture and Agri-Food Canada - UK Fish and Seafood Sector Overview

Euromonitor International - UK Fish & Seafood Category Overview

Fisheries Research and Development Corporation (FRDC) - Australia-Specific Trade Data

International Trade Centre - Market-Specific Trade Data

USDA - UK Foodservice Overview

USDA - UK Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - UK Investment Policy Hub

USDA - UK Import Regulations & Standards

DFAT - A-UK FTA

OTHER RESOURCES

EFIC
Export Connect Portal
Fitch Solutions
GlobalData
Google Trends

IbisWorld
L.E.K.
Marketline
McKinsey
Mintel

Nielsen
NZTE
Seafish UK
Statista
Trading Economics

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www.greataustralianseafood.com.au