



# UK Market Summary & Category Data for Fish & Seafood - Cod

January 2024



# 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 goes 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*



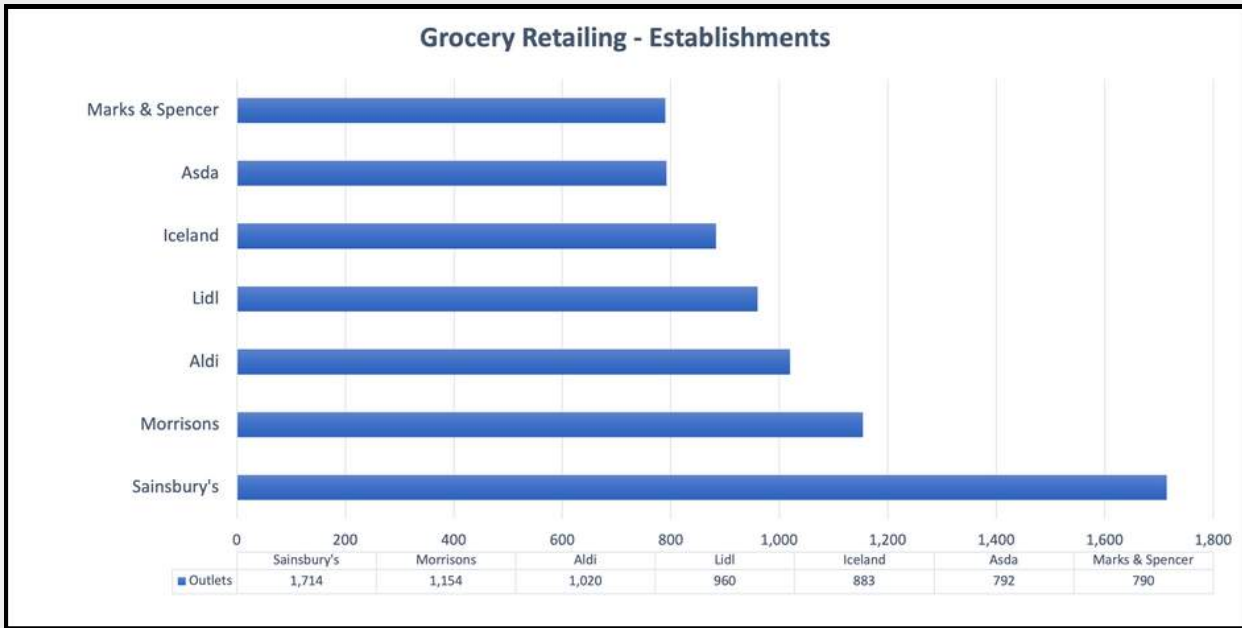
# Grocery Retail Channel Developments

## Key Trends:

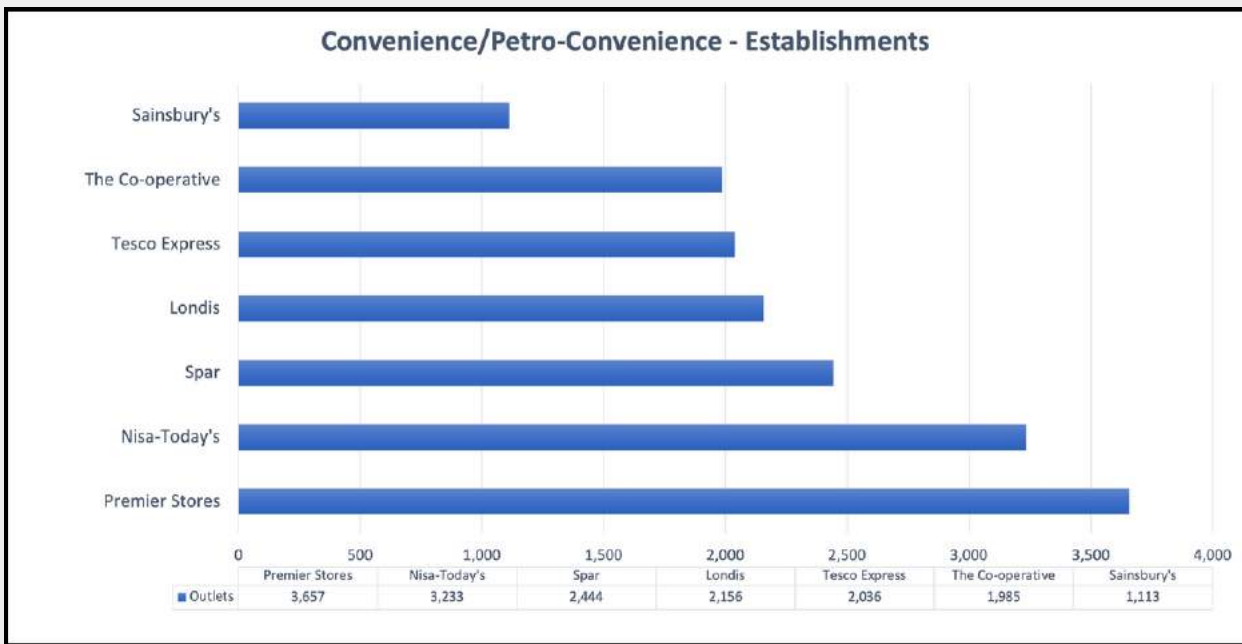
- Total grocery sales grew throughout 2020 as UK consumers flocked to supermarkets. At its height, the sector saw a 20.6% increase in sales during March 2020.
- Convenience stores have experienced accelerated growth rates during COVID-19, accounting for 16.3% of all grocery sales during April 2020. Customers 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:



Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor



# Foodservice Channel Developments

---

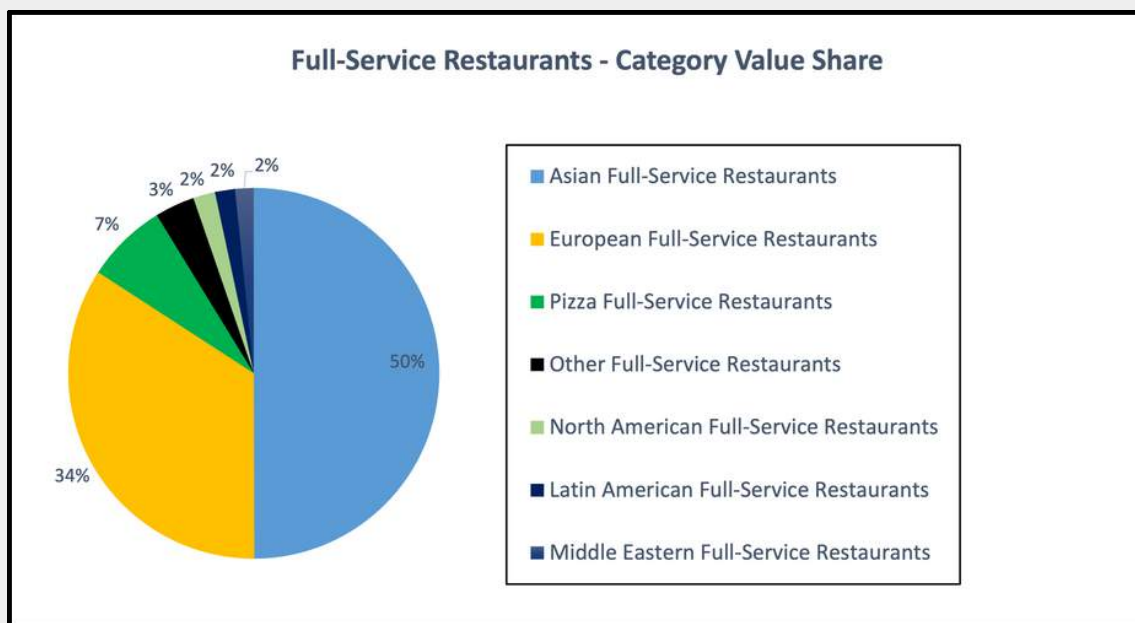
## Key Trends:

- 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.

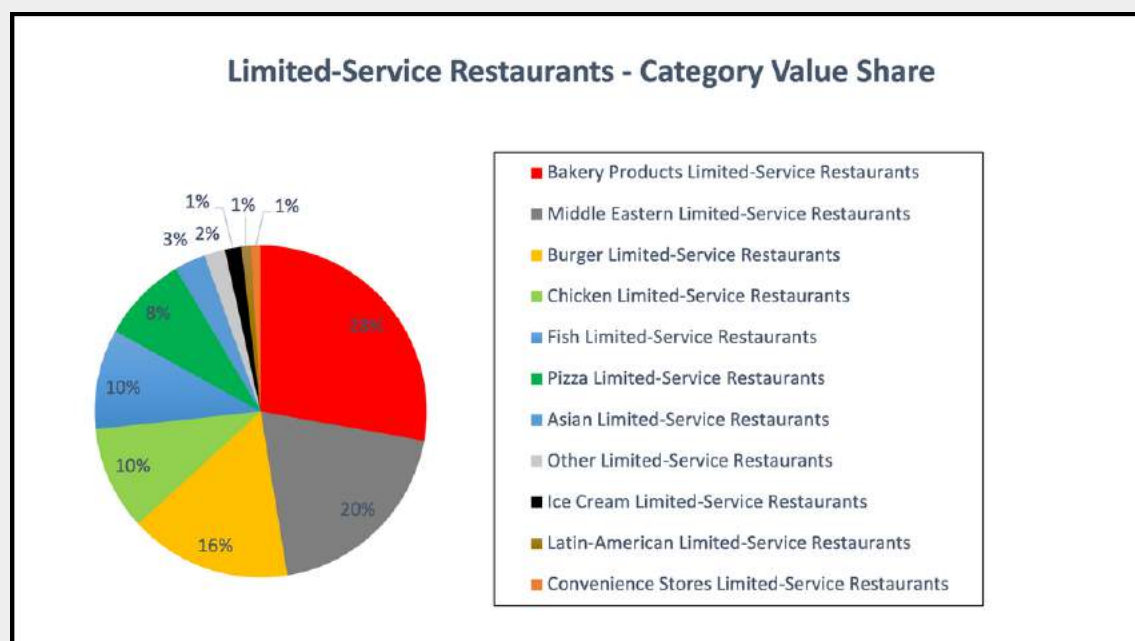


- When COVID-19 restrictions ease, alternate foodservice formats are likely to increase in number as consumers seek out enhanced dining experiences. Food halls, which house specialty restaurants under one roof, are set to continue to become fashionable as will pop-up restaurants like at 10 Heddon St,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

UK - Trade Data - HS Code 0302 Fresh or Chilled Fish

(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	939,618	129,210	-12	9	9
1	Norway	562,075	77,966	19	239	239
2	Faroe Islands	199,504	20,159	16	-4	-4
3	Türkiye	57,627	9,289	3	38	38
4	Iceland	57,029	11,581	-31	-6	-6
5	Spain	15,345	1,832	125	17	17
6	Greece	9,810	1,480	162	-3	-3
7	Sri Lanka	7,666	954	-26	24	24
8	Ireland	7,595	2,267	-6	-19	-19
9	France	4,149	768	95	-16	-16
10	Denmark	3,119	644	-86	-47	-47

AUS - Trade Data - HS Code 0302 Fresh or Chilled Fish

(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	313,159	24,537	-1	32	22
1	China	167,555	12,335	15	37	21
2	Indonesia	39,044	2,921	21	59	47
3	Japan	28,433	2,241	-6	10	5
4	United States of America	23,732	2,081	-7	25	23
5	Viet Nam	16,526	1,669	-12	49	46
6	Taipei, Chinese	12,786	1,095	39	11	5
7	Thailand	7,935	818	-67	105	114
8	Korea, Republic of	6,576	479	-9	59	54
9	Singapore	2,454	280	-75	23	13
10	Italy	1,737	135	-31	-18	-19

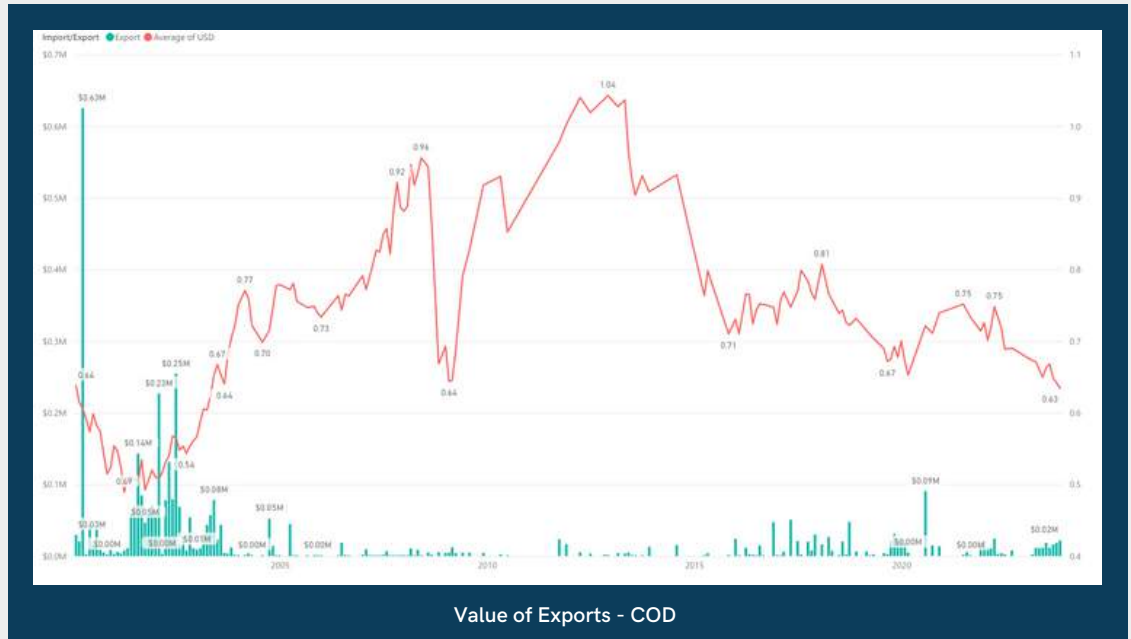
Source: ITC Trade Map, 2023

# FRDC - Trade Data

## Cod Exports - Value

AUS - Trade Data - Species: Cod

(Exports):



Commodity Description	Value
Cod, frozen (excl. fish fillets, other fish meat, livers and roes)	\$1,786,502
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$929,279
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	\$382,990
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	\$328,914
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. livers, roes and fillets)	\$165,348
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$136,606
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$60,361
Frozen fillets of cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	\$49,798
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. livers, roes and fillets)	\$28,212
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$19,457
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. fillets, livers, roes, edible offal and HS 030510)	\$1,590
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. fillets, livers, roes, edible offal and HS 030510)	\$1,275

Value of Exports - Commodity Breakdown

Country	Value
Hong Kong	\$903,858
Japan	\$849,453
United States of America	\$321,043
Taiwan	\$319,137
New Zealand	\$306,378
Papua New Guinea	\$271,741
Singapore	\$209,005
China	\$172,139
Malaysia	\$149,674
East Timor, Dem Rep of	\$87,265
United Kingdom	\$81,621
Germany	\$68,189

Leading Export Destinations - Value

State	Value
QLD	\$1,876,467
WA	\$694,042
Foreign (re-export)	\$431,671
NSW	\$403,343
VIC	\$368,634
SA	\$88,653
TAS	\$20,342
NT	\$7,180

Export Value by State

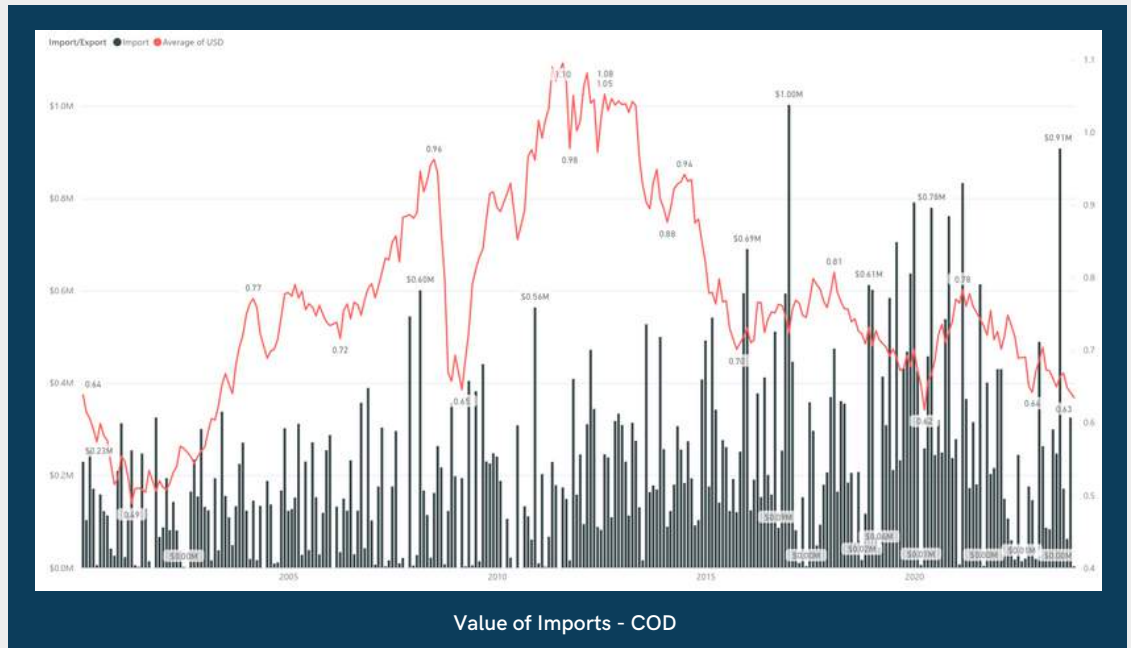
Source: FRDC, 2023

# FRDC - Trade Data

## Cod Imports - Value

AUS - Trade Data - Species: Cod

(Imports):



Commodity Description	Value
Frozen fillets of cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	\$17,116,211
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. livers, roes and fillets)	\$16,114,472
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. fillets, livers, roes, edible offal and HS 030510)	\$14,320,694
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excluding fillets an	\$3,252,040
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$3,058,064
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. livers, roes and fillets)	\$1,623,385
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$1,440,549
Cod, frozen (excl. fish fillets and other fish meat of 0304, livers and roes)	\$886,041
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. fillets, livers, roes, edible offal and HS 030510)	\$811,834
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$754,389
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	\$602,071
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excluding	\$244,993

Value of Imports - Commodity Breakdown

Country	Value
Norway	\$22,706,485
China	\$11,225,062
Portugal	\$9,808,470
Denmark	\$4,504,067
United States of America	\$1,886,510
South Africa	\$1,726,012
Iceland	\$1,443,258
New Zealand	\$1,366,419
United Kingdom	\$1,147,408
Italy	\$977,663
Canada	\$574,502
Japan	\$446,855

Leading Import Sources - Value

State	Value
NSW	\$23,195,252
VIC	\$15,384,274
QLD	\$14,591,323
WA	\$5,847,421
SA	\$1,184,824
NT	\$21,649

Import Value by State

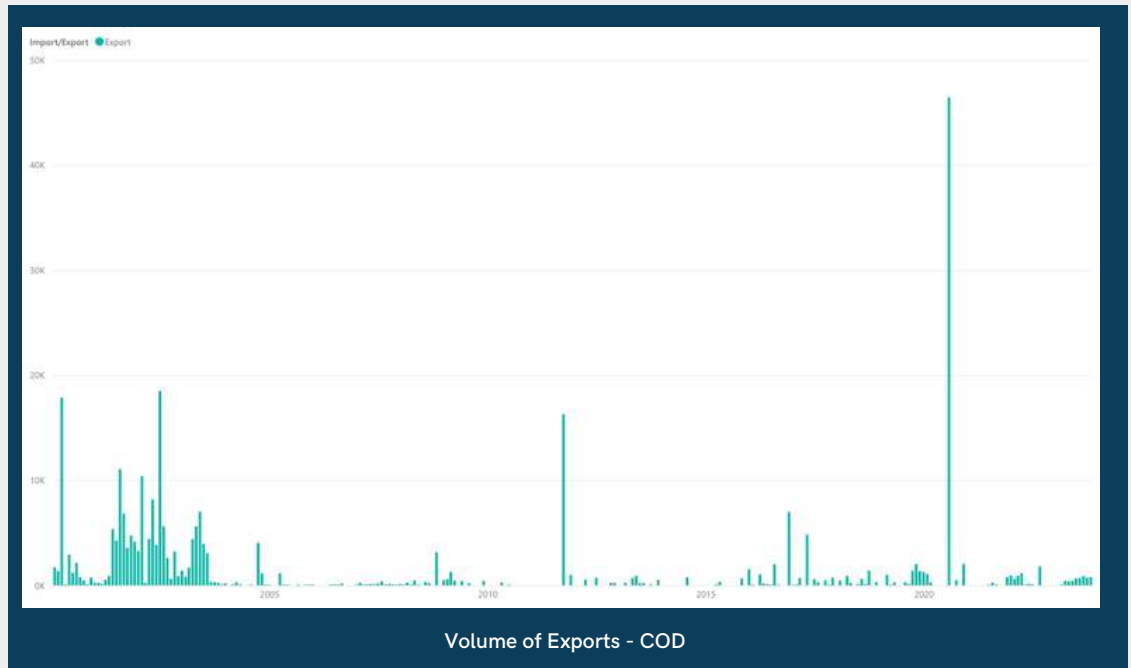
Source: FRDC, 2023

# FRDC - Trade Data

## Cod Exports - Volume

AUS - Trade Data - Species: Cod

(Exports):



Commodity Description	Quantity
Cod, frozen (excl. fish fillets, other fish meat, livers and roes)	84,509
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	83,521
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	62,671
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	19,525
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	16,447
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	14,586
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. livers, roes and fillets)	9,032
Frozen fillets of cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	4,339
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	2,568
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. livers, roes and fillets)	1,430
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. fillets, livers, roes, edible offal and HS 030510)	125
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. fillets, livers, roes, edible offal and HS 030510)	125

Volume of Exports - Commodity Breakdown

Country	Quantity
Papua New Guinea	70,332
Hong Kong	57,498
Japan	35,297
New Zealand	27,386
United States of America	20,212
Taiwan	17,910
China	15,816
United Kingdom	14,475
Singapore	12,467
Malaysia	7,756
East Timor, Dem Rep of	6,583
Germany	3,865

Leading Export Destinations - Volume

State	Quantity
QLD	169,674
Foreign (re-export)	39,502
NSW	32,397
VIC	26,883
WA	23,937
SA	4,818
TAS	869
NT	798

Export Volume by State

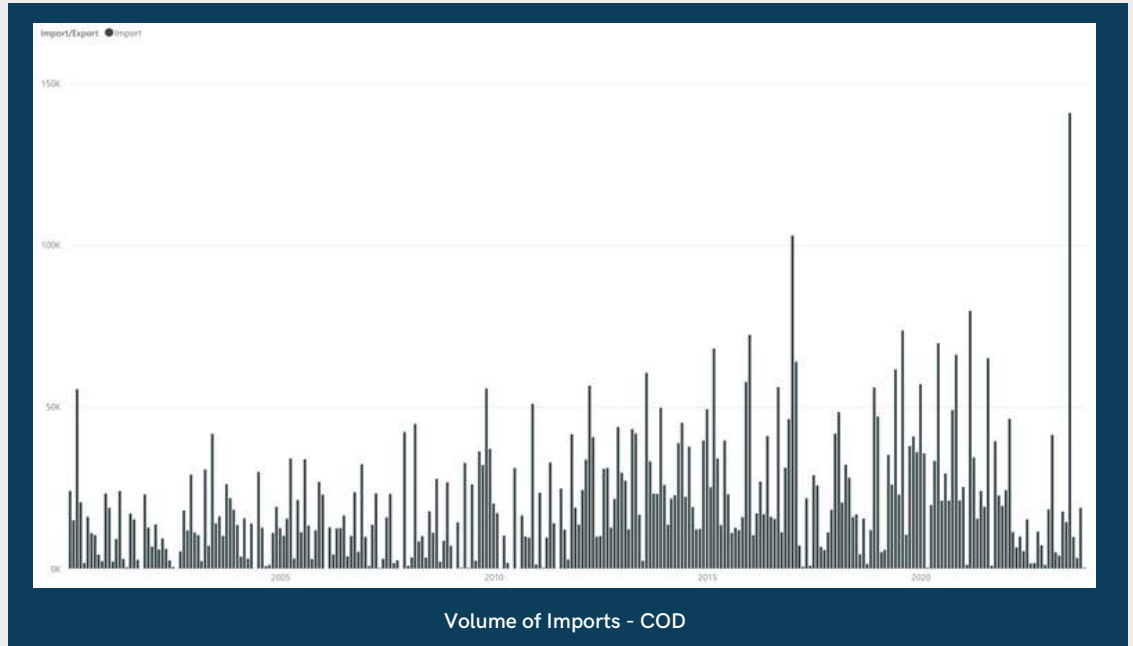
Source: FRDC, 2023

# FRDC - Trade Data

## Cod Imports - Volume

AUS - Trade Data - Species: Cod

(Imports):



Commodity Description	Quantity
Frozen fillets of cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	1,768,422
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. livers, roes and fillets)	1,373,986
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. fillets, livers, roes, edible offal and HS 030510)	1,135,126
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	449,175
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excluding fillets and	399,755
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. livers, roes and fillets)	185,146
Cod, frozen (excl. fish fillets and other fish meat of 0304, livers and roes)	181,708
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	171,516
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	96,287
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. fillets, livers, roes, edible offal and HS 030510)	70,191
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	45,825
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excluding	8,836

Volume of Imports - Commodity Breakdown

Country	Quantity
Norway	1,927,032
China	1,209,488
Portugal	873,810
Denmark	501,201
South Africa	311,282
New Zealand	236,491
Iceland	155,104
United States of America	124,890
United Kingdom	114,478
Italy	71,716
Russian Federation	51,366
Canada	42,727

Leading Import Sources - Volume

State	Quantity
NSW	2,085,871
QLD	1,693,527
VIC	1,359,485
WA	669,325
SA	65,545
NT	12,220

Import Volume by State

Source: FRDC, 2023

# FRDC - Trade Data Sourced from FAO

## Food and Agriculture Organization (FAO) Production Volume, Value and Trade - Cods, Hakes, Haddocks

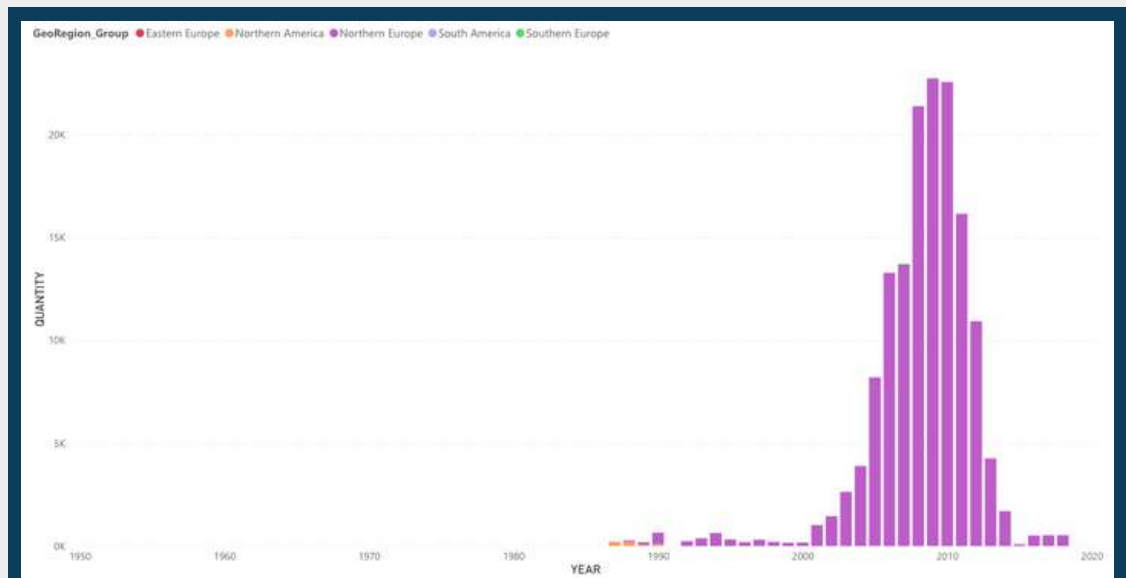
### ISSCAAP Group: Cods, Hakes, Haddocks

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Tonnes - net product weight	13 543	14 104	11 158
United Kingdom	Tonnes - net product weight	282 589 E	287 116	328 038

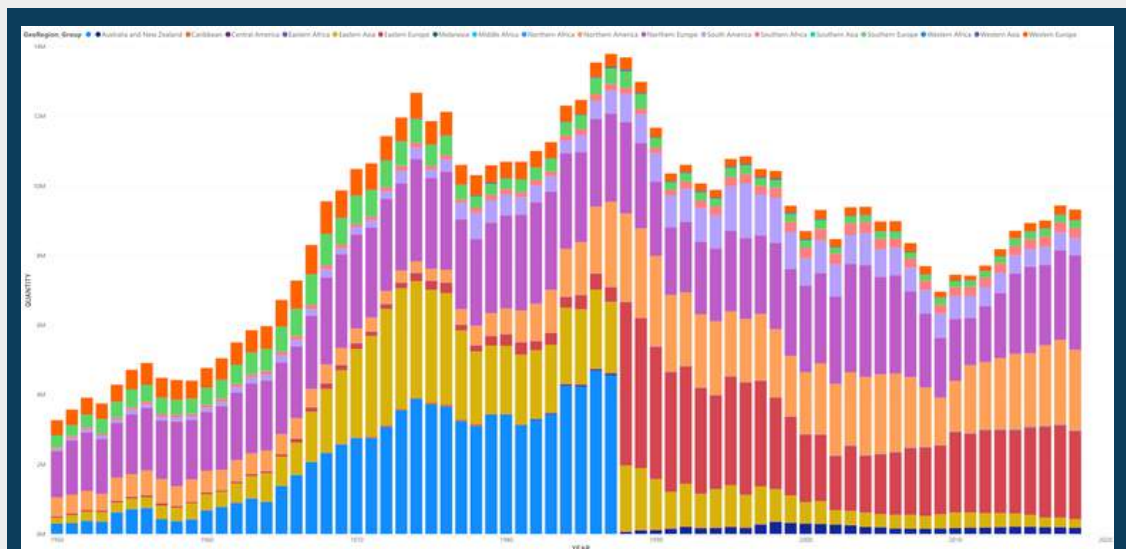
  

Reporting country Name En	Unit Name	2021	2020	2019
Australia	Value (USD 1000)	51 482	53 408	47 214
United Kingdom	Value (USD 1000)	1 157 468	1 143 799	1 357 732

Production 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



# Contact Us

---

For more information please contact Seafood Industry Australia:

## Laura Davies

### Trade Export Manager

[trade@seafoodindustryaustralia.com.au](mailto:trade@seafoodindustryaustralia.com.au)

[info@seafoodindustryaustralia.com.au](mailto:info@seafoodindustryaustralia.com.au)

### Websites:

[www.seafoodindustryaustralia.com.au](http://www.seafoodindustryaustralia.com.au)

[www.greataustralianseafood.com.au](http://www.greataustralianseafood.com.au)

