Rising to global challenges in the seafood sector: Seafish's role

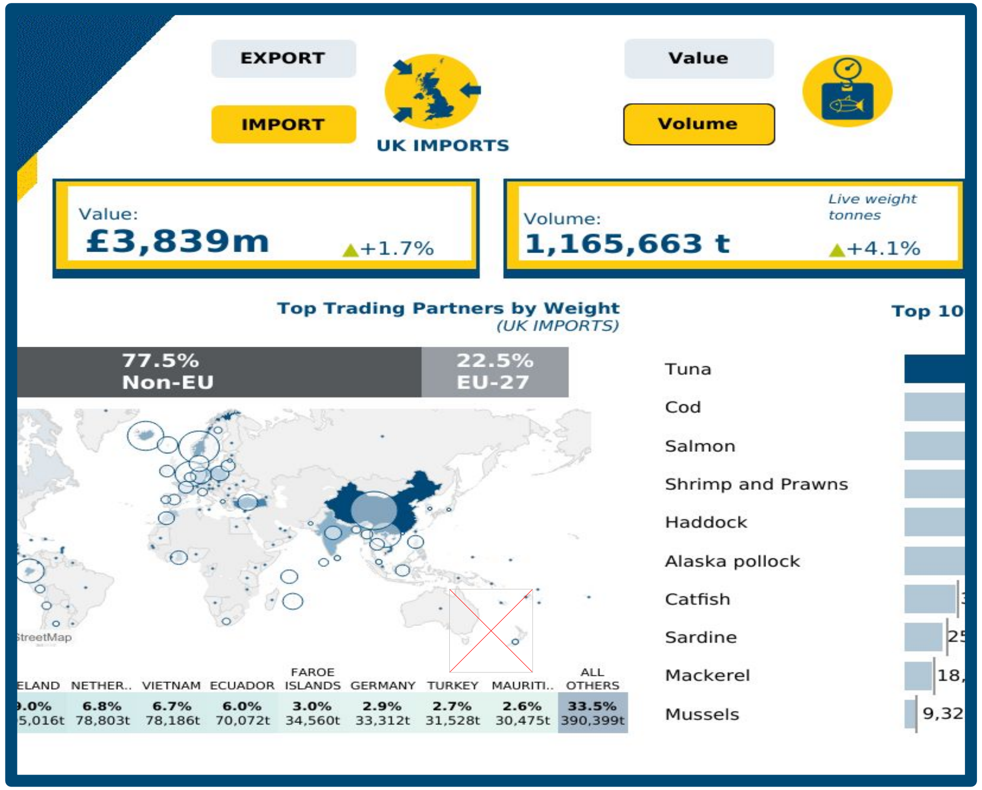
SAGB Annual Conference 2026

Colin Faulkner

14 July 2026

Here to give the UK seafood sector **the support it needs to thrive.**

Introduction: a shameless plug



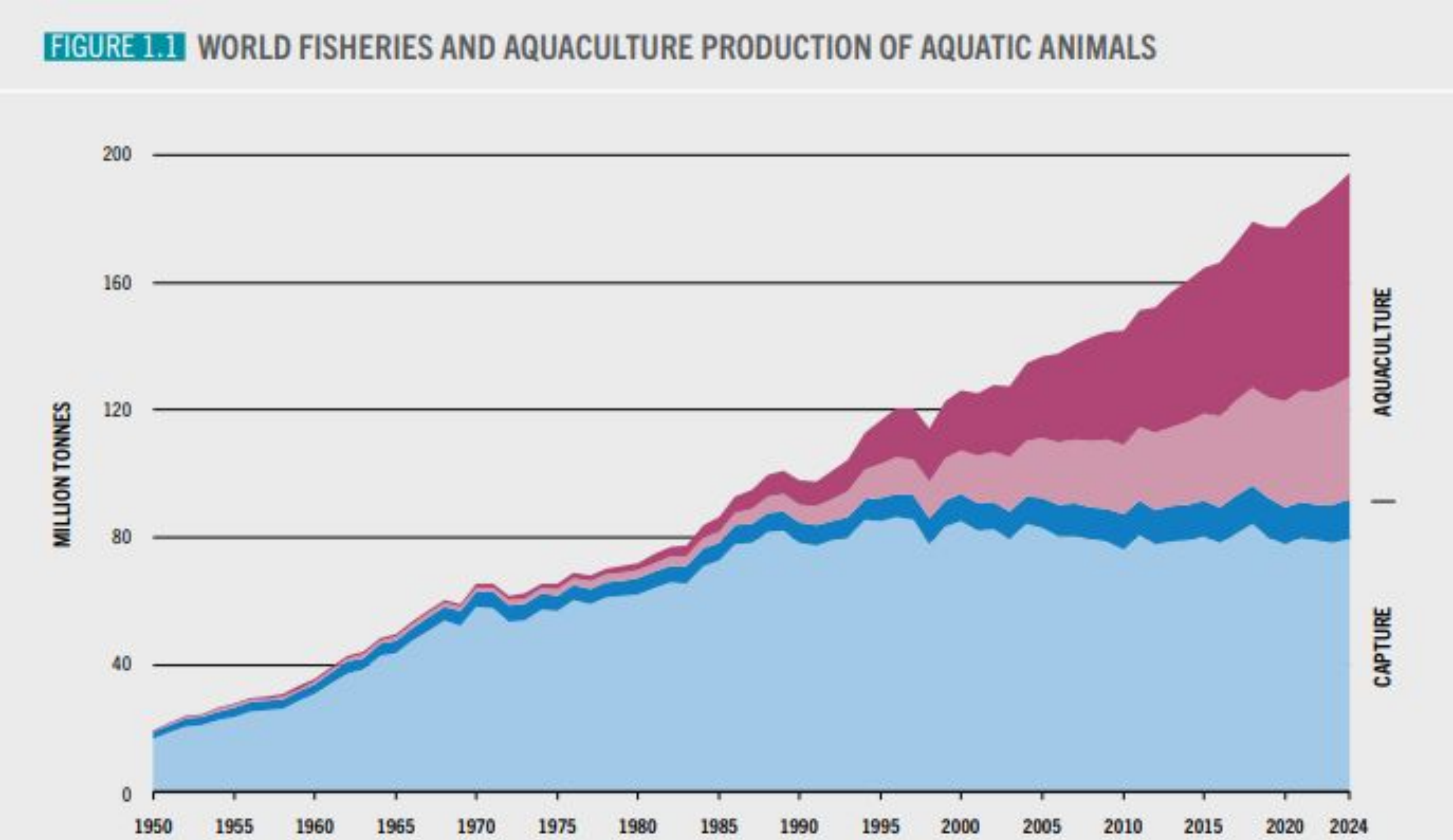
Trade and Tariff Tool in Tableau

https://www.seafish.org/insight-and-research/seafood-trade-data/latest-uk-seafood-trade-data/#PDF

The opportunity for growth in the global marketplace for seafood

FAO The State of World Fisheries and Aquaculture 2026
https://www.fao.org/publications/fao-flagship-publications/the-state-of-world-fisheries-and-aquaculture/en

Where will that growth come from?



FAO The State of World Fisheries and Aquaculture 2026
https://www.fao.org/publications/fao-flagship-publications/the-state-of-world-fisheries-and-aquaculture/en

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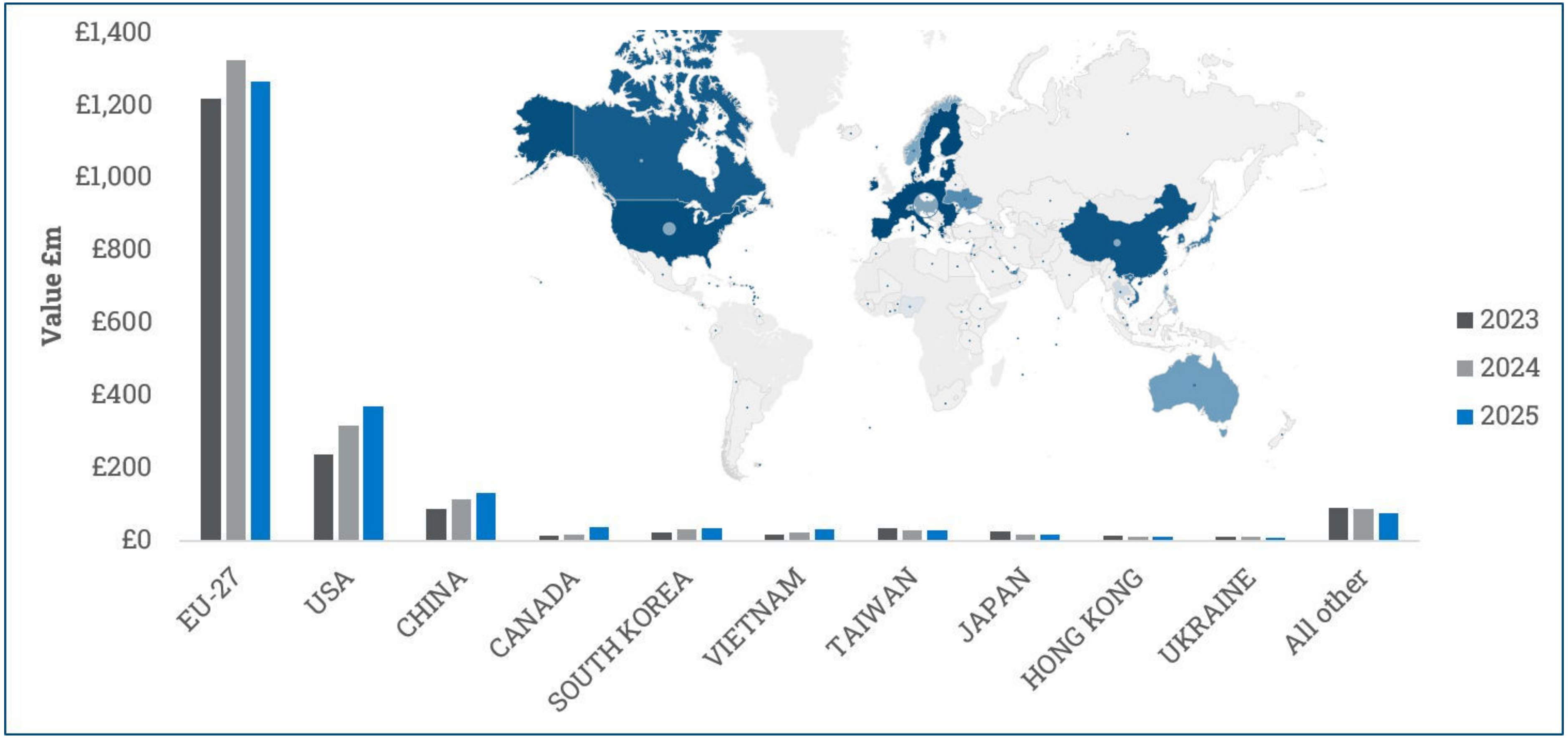
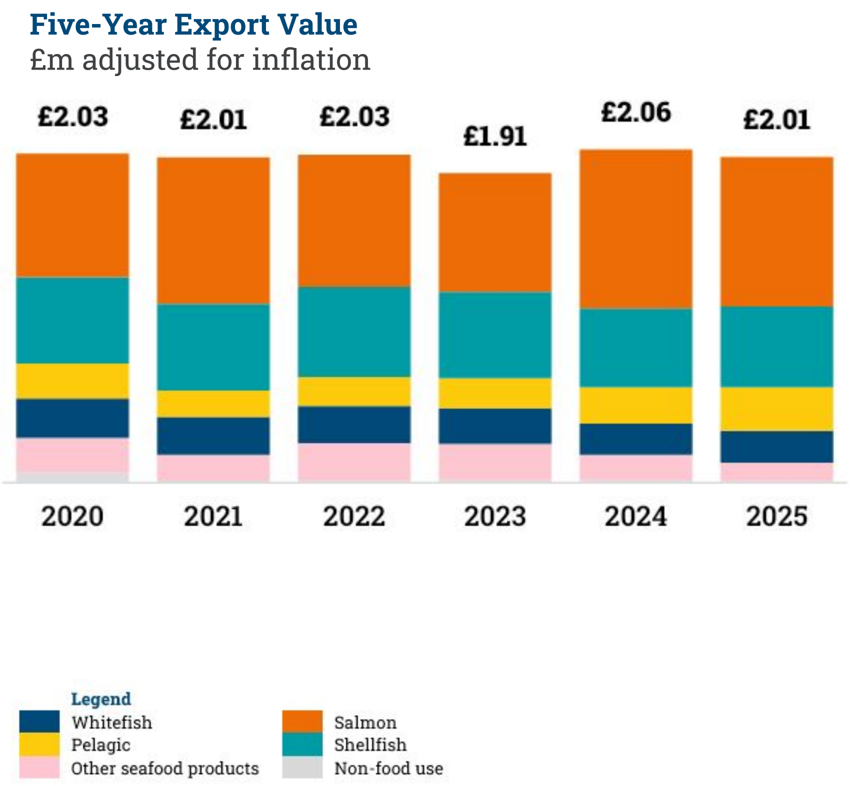
We know that we have a product that's in demand



Seafish Trade and Tariff Tool
https://public.tableau.com/app/profile/seafish/viz/SeafishTradeandTariffTool/Homepage

UK Seafood Exports

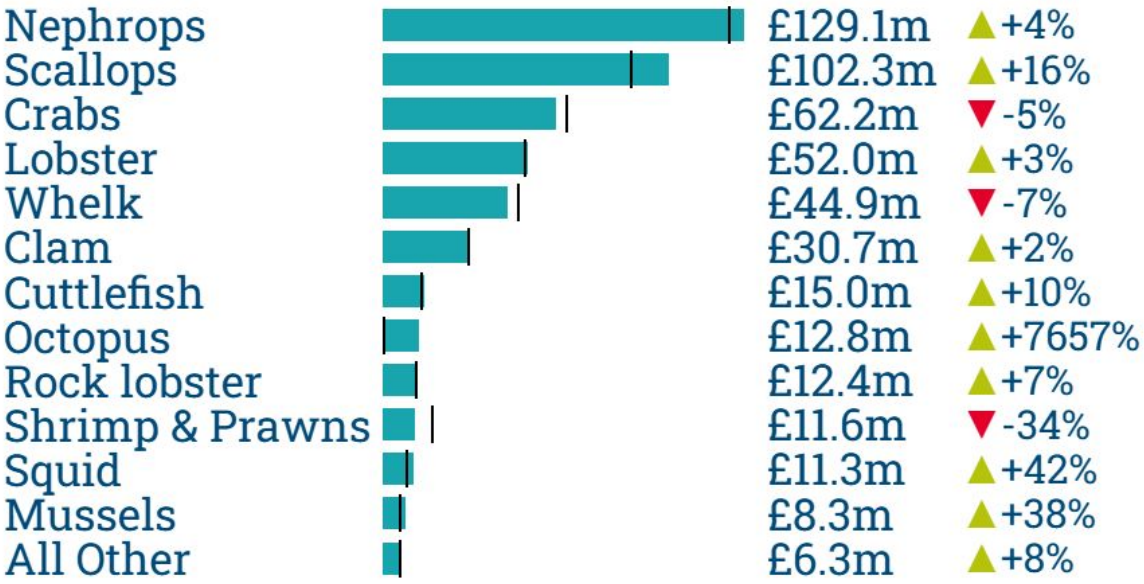
Shellfish make up 25% of total UK seafood export value and experienced second highest value growth in 2025 behind pelagic exports



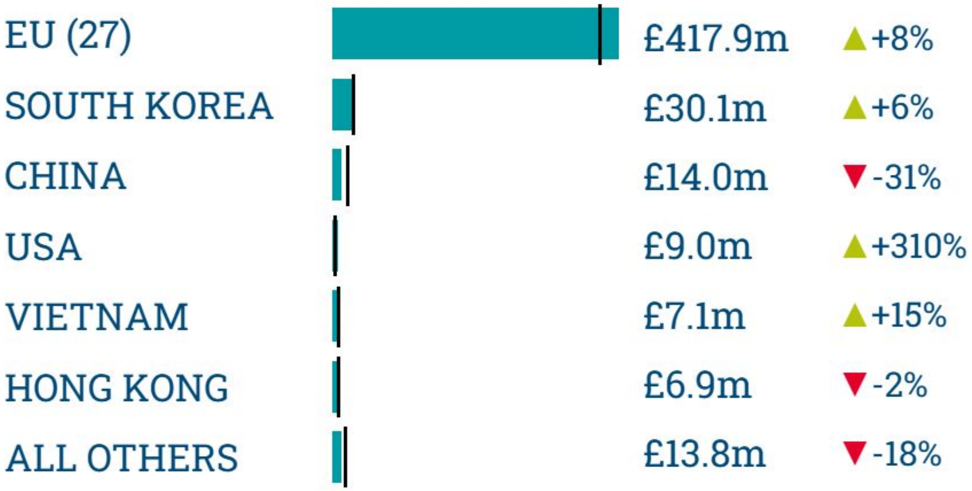
UK Shellfish Exports in 2025

Value growth of £30.2m of shellfish exports driven by scallops, octopus and nephrops, particularly to the EU, US and South Korea

Top Exported Shellfish Species in 2025
Value £m



Top Shellfish Export Destinations in 2025
Value £m



A strong wind behind UK exports & export promotion

https://www.fdf.org.uk/globalassets/resources/publications/reports/trade-reports/2025-trade-snapshot.pdf

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We know it's a high-protein, low-carbon product

- *"the results demonstrate that offshore mussel farming is a highly sustainable food production system"*

- *"this study reaffirms the high sustainability credentials of mussel farming, which provides a high-protein food source with lower environmental impacts than land-based animal production or fed aquaculture".*

- 'Environmental sustainability assessment of offshore mussel farming: A Life-Cycle Approach', *Aquaculture* 623 (2026)

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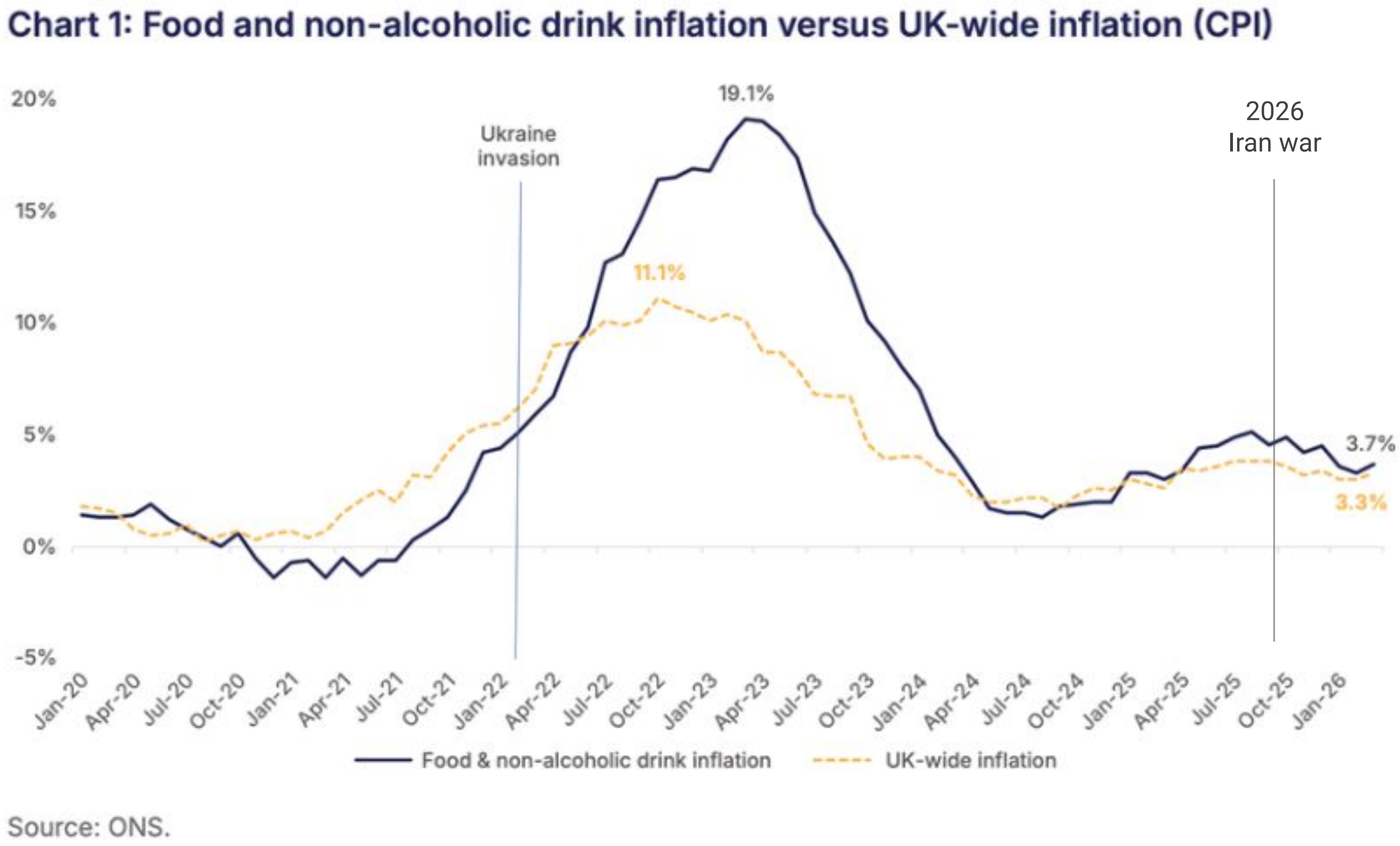
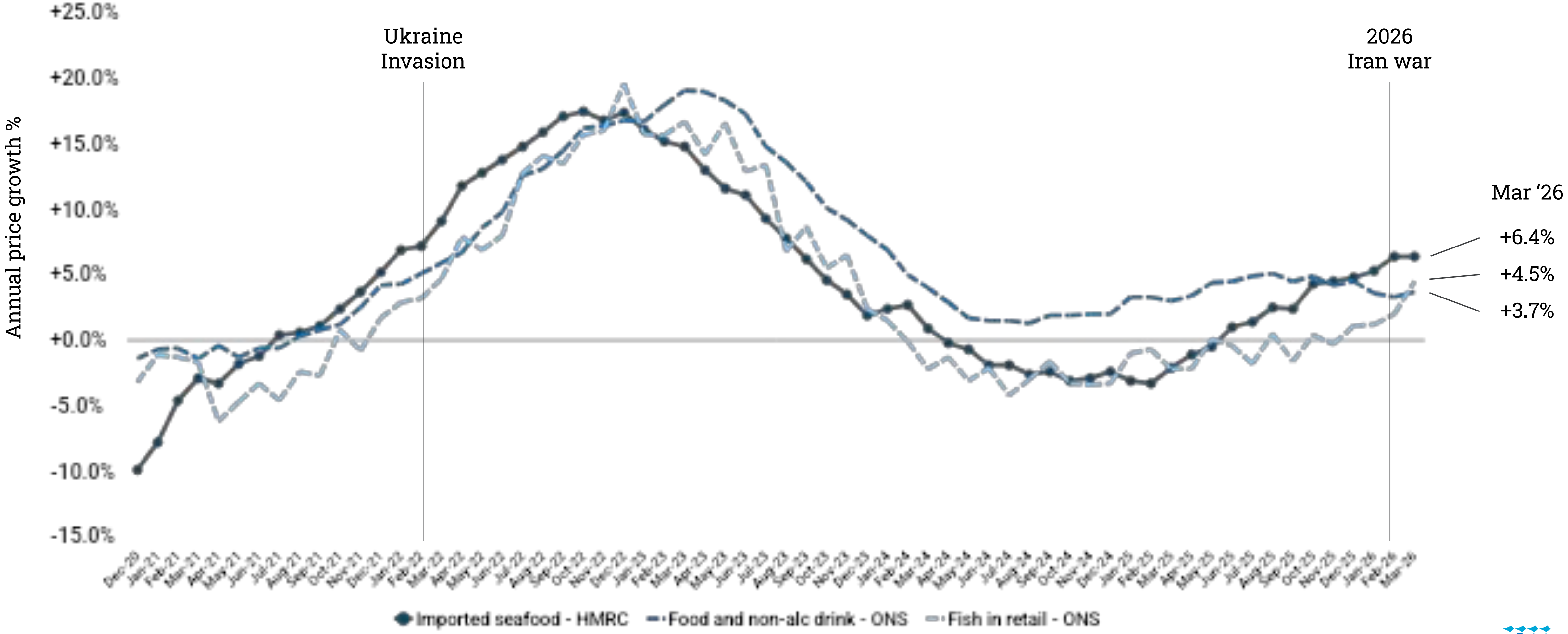
Food price inflation as a result of cost rises for energy, transport and plastic packaging etc



https://www.fdf.org.uk/fdf/resources/publications/state-of-industry-reports/state-of-industry-report-q1-2026/

Imported seafood price inflation continues into 2026



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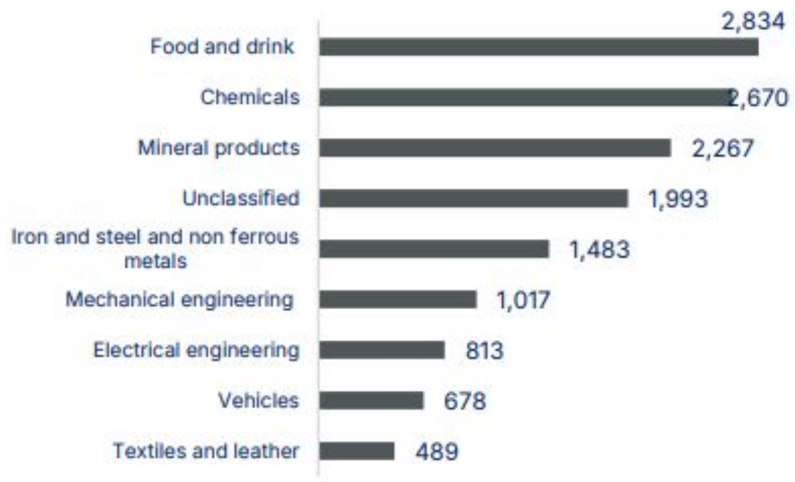
Trade data: HMRC trade in goods statistics to March 2026.
ONS Inflation and price indices https://www.ons.gov.uk/economy/inflationandpriceindices#datasets (CPI ANNUAL RATE 01 : FOOD AND NON-ALCOHOLIC BEVERAGES 2015=100 & CPI ANNUAL RATE 01.1.3 : FISH 2015=100)

The challenge of being a big energy consumer

In the UK, Food and drink is the manufacturing industry with the largest energy consumption. Energy shocks are expected at a time where food sales volumes are 7% below pre-pandemic levels.

Chart 2: Total energy consumption, by industry, 2024



Source: DESNZ, Final Energy Consumption (Final Energy Consumption Tables, Table C3.1)

Chart 3: Food retail sales

Source: ONS

https://www.fdf.org.uk/fdf/resources/publications/state-of-industry-reports/state-of-industry-report-q1-2026/

....and then there's the US.....

USA is the largest seafood importer globally. US tariffs shape global trade flows

US' Section 301 action threatens $2.9bn in new tariffs on seafood imports

If you thought the amount of tariffs paid for US seafood imports in 2025 was high, 2026 could be worse

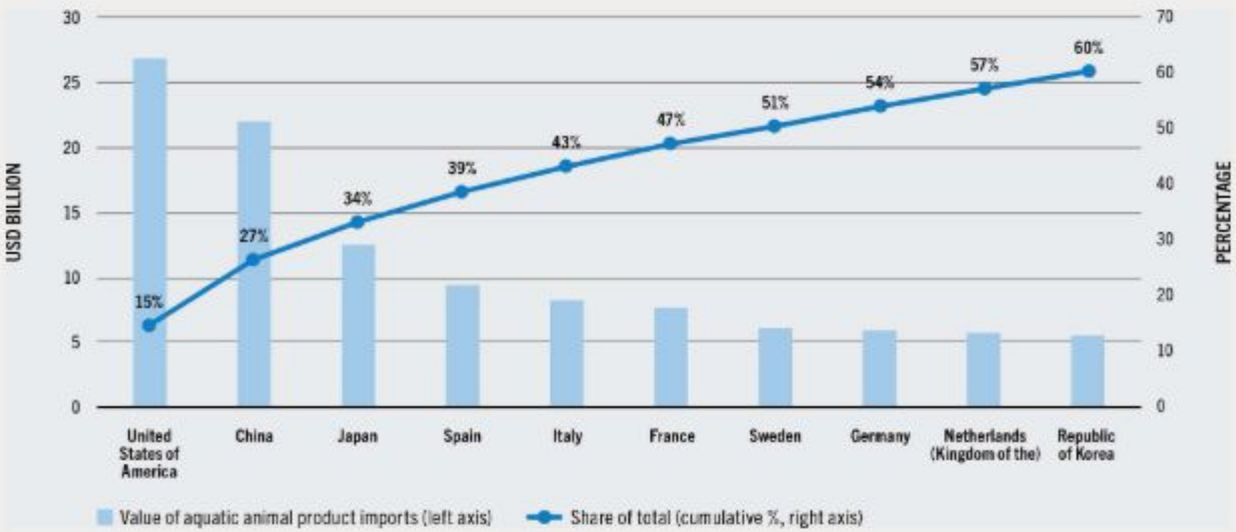
By Cliff White and Jason Huffman | June 3, 2026 17:44 BST

New tariffs proposed by US (June 3rd 2026) target 60 economies with tariffs as high as 12.5% on goods with justification that they have not done enough to block imports made using forced labour.

Including:

- 12.5% extra duty on US imports from Brazil, India, Vietnam, Chile and Norway, nations that supply tilapia, shrimp and salmon
- 10% duty on US imports from Canada, Mexico, Ecuador, Indonesia and EU.

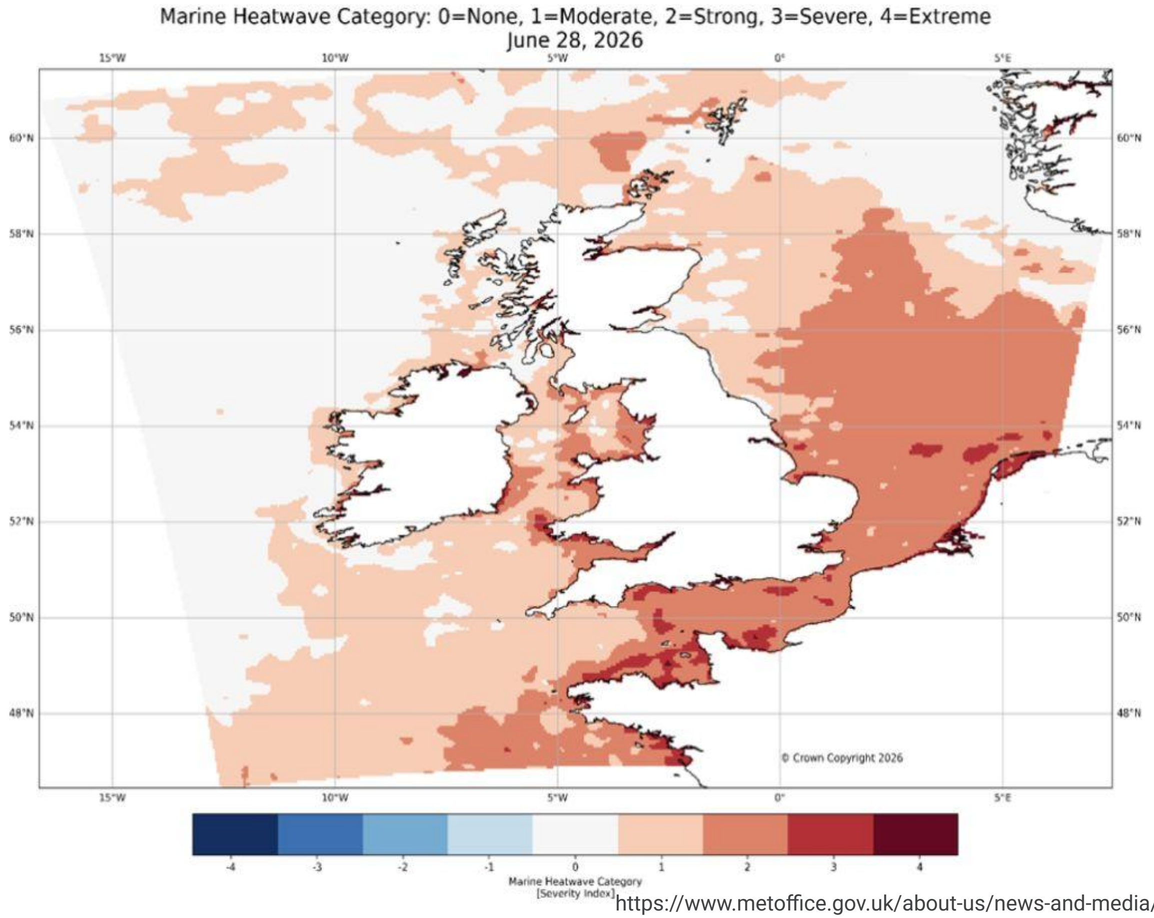
FIGURE 1.45 TOP TEN IMPORTING COUNTRIES OF AQUATIC ANIMAL PRODUCTS BY VALUE, 2024



NOTE: Aquatic animals exclude aquatic mammals, crocodiles, alligators, caimans, sponges, corals, pearls and algae.
SOURCE: Preliminary data. Final data will be available here: FAO. 2026. Global aquatic trade statistics. https://www.fao.org/fishery/en/collection/global_commodity_prod. Licence: CC-BY-4.0.

https://www.undercurrentnews.com/2026/06/03/us-section-301-action-threatens-2-9bn-in-new-tariffs-on-seafood-imports/

...and the climate too....



https://www.metoffice.gov.uk/about-us/news-and-media/media-centre/weather-and-climate-news/2026/long-lasting-uk-marine-heatwave-likely-to-reach-extreme-levels-next-week

https://www.linkedin.com/posts/the-shellfish-association-of-great-britain_an-important-news-article-from-the-met-office-activity-7478801866810798080-bscS?utm_source=share&utm_medium=member_desktop&rcm=ACoAABweUZMBaHRq7_kdnpjWEQIOS0IFNFYqxz0

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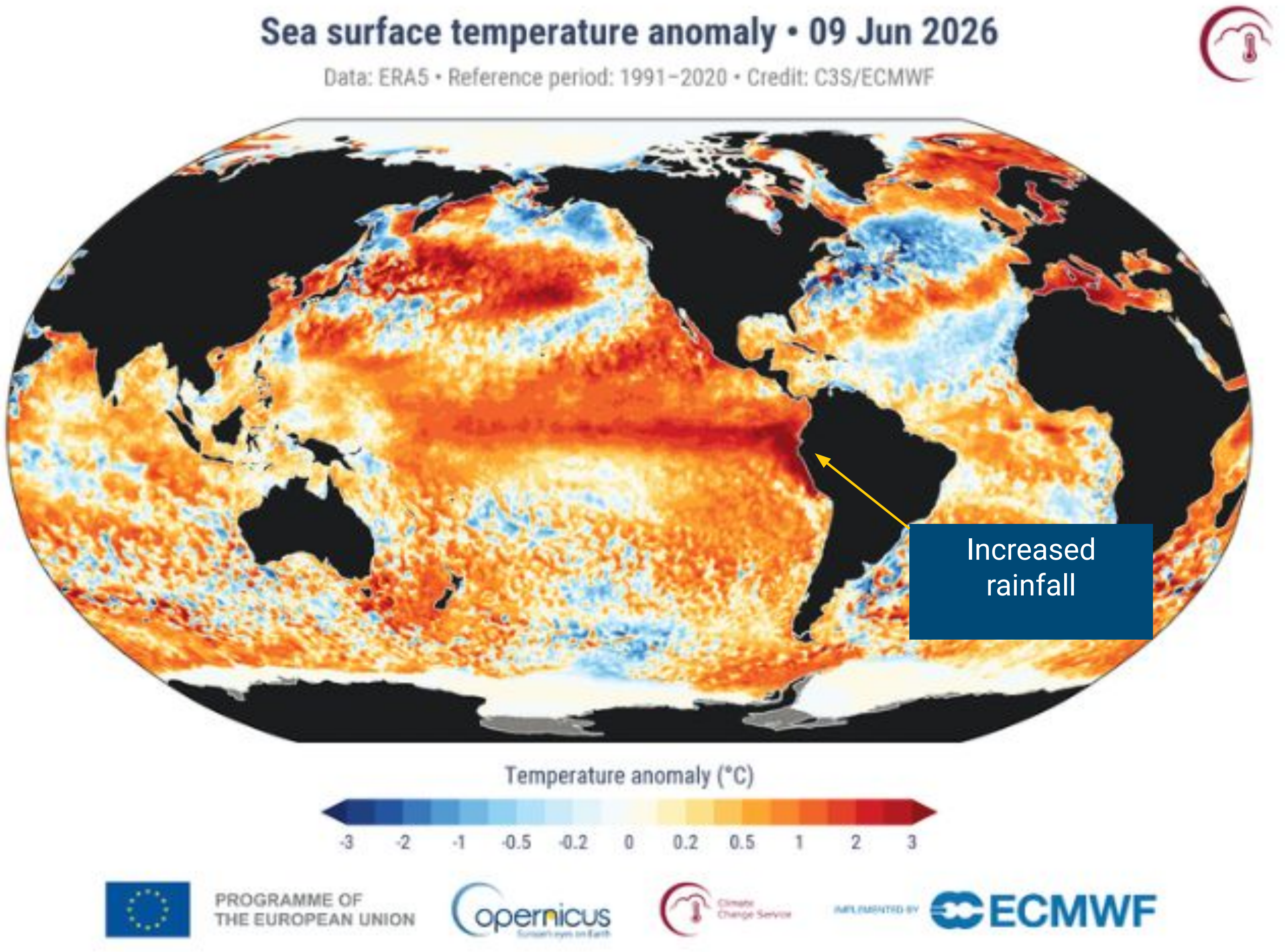
Beyond the UK, a ‘super’ El Nino is expected for late 2026, early 2027



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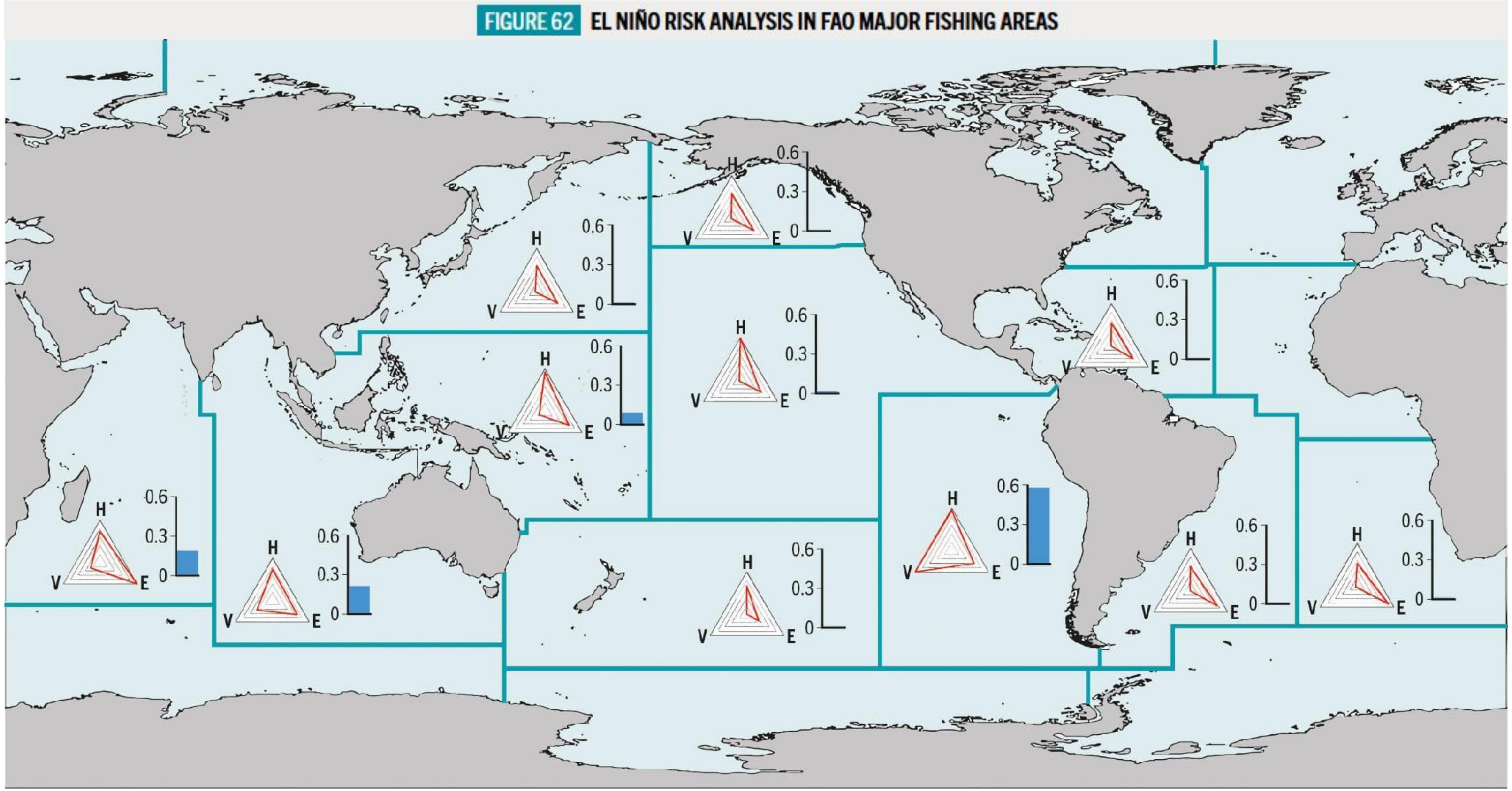
https://www.metoffice.gov.uk/blog/2026/el-nio-declared-for-2026-as-pacific-warms
https://www.spglobal.com/energy/en/news-research/latest-news/agriculture/061826-el-nio-to-drive-volatility-in-bearish-ecuador-shrimp-market

El Niño events impacted marine fisheries in 11 of the 19 marine FAO Major Fishing Areas



https://openknowledge.fao.org/server/api/core/bitstreams/1273bc36-339b-43d2-8163-af4d805f2ad2/content/sofia/2024/impacts-marine-fisheries-aquaculture.html

The Seafish 2026-2027 Annual Plan

- The Plan sets out our direction for the year ahead, but it's not a strait-jacket.
- We will continue to listen, learn and adapt as the external environment changes and as we hear from our stakeholders.

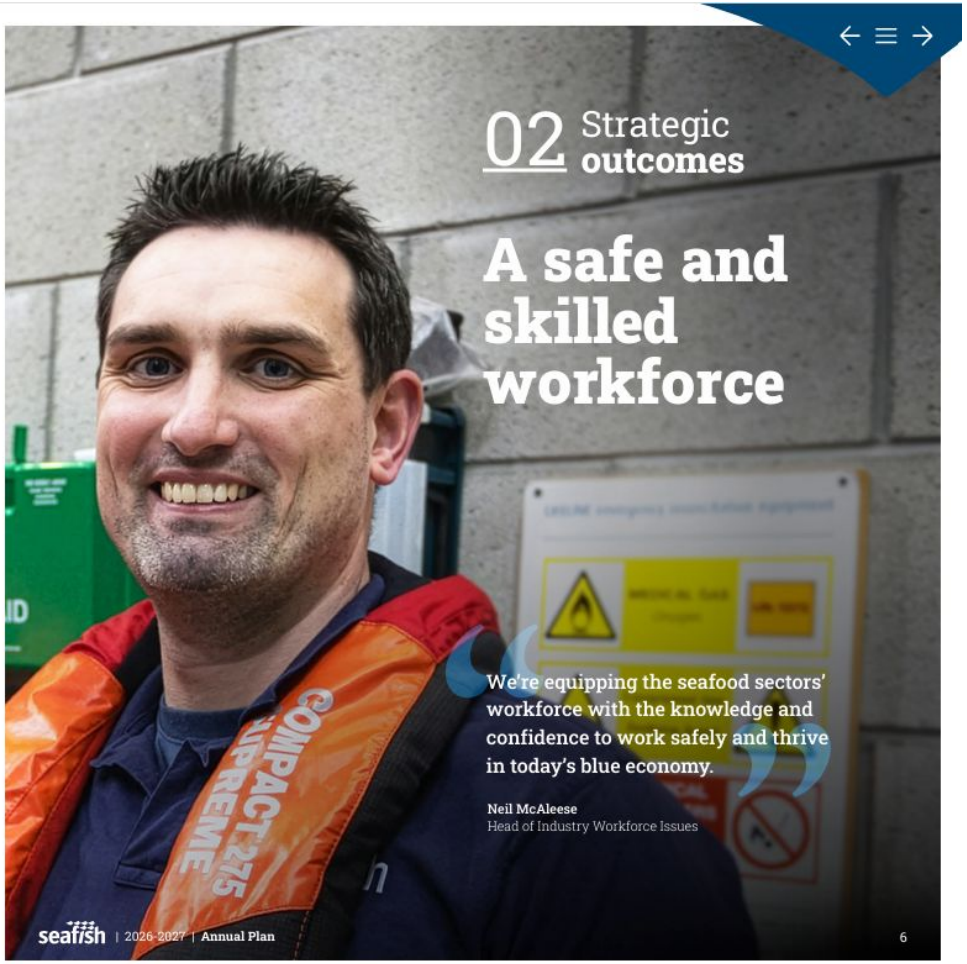
Our work is built around **three strategic outcomes**

Strategic **outcomes**

A safe and skilled workforce

Priorities for 2026-2027

1. Expand support on all aspects of spatial squeeze and improve awareness of offshore infrastructure and hazards
2. Strengthen the evidence base around labour issues across the supply chain and share our findings with industry and government.
3. Drive improvements in fishing safety by facilitating national and regional fishing safety forums and delivering critical safety interventions.
4. Support catching and aquaculture to attract and retain domestic workers through training, safety refreshers and career pathways.
5. Support the onshore sectors to develop the domestic skills needed through apprenticeships, online learning and tailored industry training.



Strategic **outcomes**

Smoother and expanding seafood trade

Our work is structured around three pillars:

01

Trade **facilitation:**

supporting domestic and international regulatory compliance.

02

Market **development:**

developing new international markets.

03

Trade **development:**

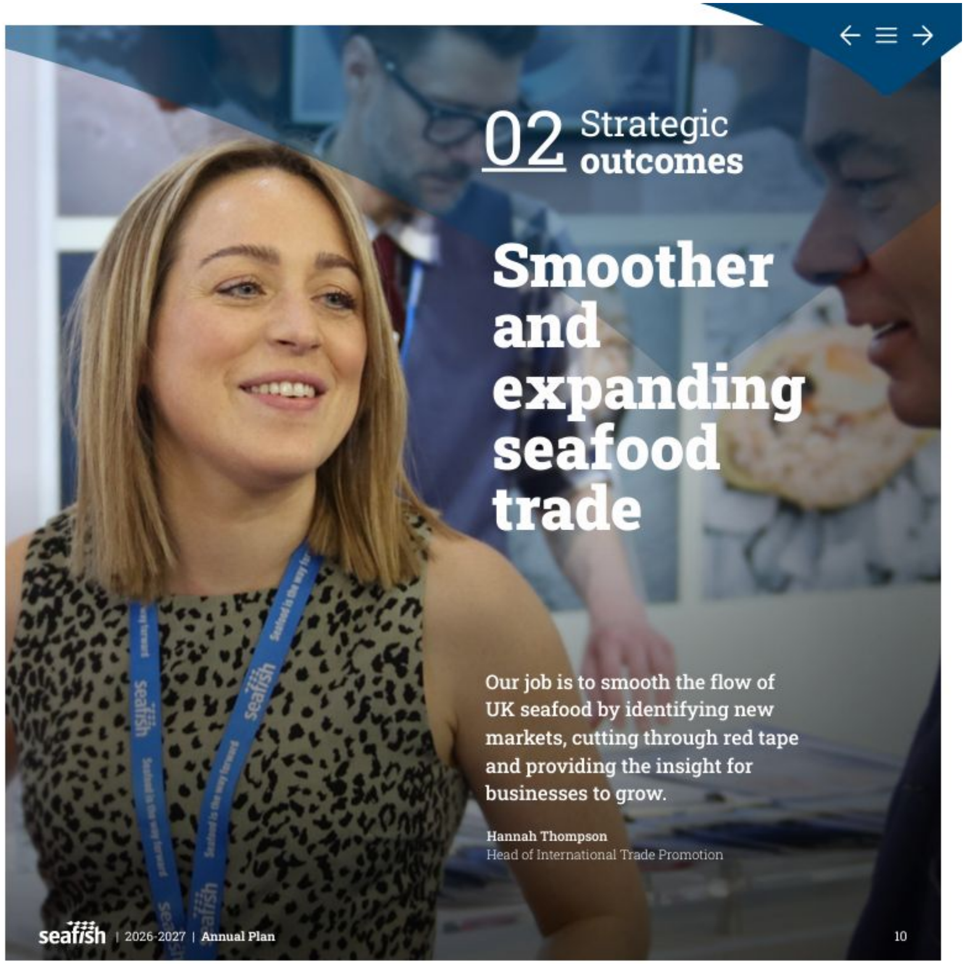
strengthening existing international markets.

Strategic **outcomes**

Smoother and expanding seafood trade

Priorities for 2026-2027

1. Help exporters identify and access new target markets, support the removal of trade barriers, and provide guidance on navigating tariffs and regulations.
2. Help seafood businesses to comply with UK trade regulations.
3. Support aquaculture businesses to navigate an increasingly complex regulatory environment to unlock growth opportunities in the UK and overseas.
4. Align market development activity with confirmed funding while positioning UK seafood businesses in priority international markets by collaborating with industry and UK government partners.



Strategic **outcomes**

A resilient supply chain

Priorities for 2026-2027

1. Help more seafood businesses understand and manage greenhouse gas emissions by enhancing our Seafood Carbon Emissions Profiling Tool (SCEPT) and expanding its adoption across the UK seafood supply chain.
2. Accelerate the transition to net zero by enabling better investment decisions through integrated mapping of ports, vessel activity and renewable fuel infrastructure.
3. Improve alignment across traceability, supply chain integrity, responsible sourcing and gear innovation through cross-sector forums bringing together industry, researchers and regulators.
4. Help the industry respond to rapid change in retail and food service markets by providing timely, accessible market insights.

Strategic **enablers**

Data, insights and innovation

"We aim to be the UK's go-to hub for seafood data and insights, offering trusted evidence that cuts through the noise, fuels smarter decisions and sparks innovation across our industry."

Arina Motova-Surmava

Chief Economist