



Market Report

A Snapshot of your Marketing Sector

Shellfish Production

This pack has been designed to provide information on setting up a business in the **Shellfish Production** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website (www.bgateway.com/businessplan), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **April 2025**.

What do I need to know about the Shellfish Production market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ The fish and shellfish market saw volumes decline in 2022 and 2023. Pressure on household budgets and rising prices in the category saw many people cut back on these pricier options, in favour of more affordable alternatives. However, 2024 saw a return to volume growth, driven by easing inflation and an uptick in consumer confidence early in the year. The 2024 fish/shellfish retail sales market size was **£4,921m**, the long-term growth for 2024-29 is **+12.6%** driven by inflation, with volumes largely flatlining. (Mintel, *Fish and Shellfish – UK*, February 2025).
- ◆ In 2024-2025, revenue is forecast to inch upwards by 0.2%. Stabilising prices are reviving consumer confidence which, combined with the infectious expansion of health consciousness, is helping to bolster farmed fish sales. Over the five years through 2029-2030, revenue is forecast to climb at a compound annual rate of 2%, climbing to just shy of **£1.6 billion**. Global demand for fish is set to continue to soar due to projected population growth rates, which will boost future export demand. Innovative players are increasingly pumping money into technology set to drastically improve farm waste and disease control. (IBISWorld, *Aquaculture in the UK*, August 2024).
- ◆ Over the five years through 2024-25, industry revenue is projected to drop at a compound annual rate of 2.1% to just over **£1.2 billion**, owing to a sharp dip in revenue over 2020-21 due to COVID-19-related disruptions causing seafood prices to sink along with catch volumes, despite a quick recovery the following year. In 2024-25, marine fishing revenue is expected to hike by 2.5%, supported by persistently high seafood prices and a steady landed volume of most seafood products. Over the five years through **2029-30**, marine fishermen's revenue is projected to swell at a compound annual rate of 1.2% to **£1.3 billion**. (IBIS World, *Marine Fishing in the UK*, Nov 2024)
- ◆ In 2023, **10,311 tonnes of common mussel were produced** for the table market, this is the highest level of common mussel production recorded in Scotland. The Scottish shellfish farming sector is estimated to be worth approximately **£14.1 million** at first sale value, an increase of 36% on the 2022 value. (Scottish Government, [Scottish Shellfish Farm Production Survey 2023](#), June 2024).
- ◆ The national organisation for this industry is [Shellfish Association of Great Britain](#). Other industry bodies include [Scotland's Aquaculture](#), [Association of Scottish Shellfish Growers](#), [Scottish Fishermen's Federation](#), [Marine Scotland](#), [Sea Fish Industry Authority](#) and [Seafood Scotland](#).



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Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email info@bgateway.com.

- ◆ **Euromonitor - Fish and Seafood in the United Kingdom (December 2024).** In 2023, retail volume sales of fish and seafood in the UK notably declined. This downturn was primarily due to another year of substantial price hikes, driven by escalating production costs and a constrained supply chain. The situation was further exacerbated by a trade embargo on Russian fish, which significantly tightened the market. As living costs surged, consumers began shifting their preferences from premium fish species such as salmon, cod, haddock, and prawns to more budget-friendly alternatives such as hake, basa, and pollock. The higher unit prices of crustaceans, molluscs, and cephalopods meant these types were more severely impacted compared to fish, reflecting the broader trend of consumers reducing their expenditure in response to financial pressures.
- ◆ **IBIS World - Fish and seafood industry in the United Kingdom (June 2024).** This report presents a range of statistics and facts about the fish and seafood industry in the United Kingdom. The chapters include data on the consumption and production volume of fish and seafood, as well as data on the import and export value of fish and seafood in the UK.
- ◆ **Technavio - Global Fresh Fish and Seafood Market 2024-2028 (February 2024).** UK contributed 6.3% to the global fresh fish and seafood market in 2023, and its contribution will decline to 6.15% in 2028.

There are also a number of online resources you may find helpful:

- ◆ [Scottish Government Marine Scotland Science, Scottish Shellfish Production Survey 2023](#). This report is based on the return of an annual survey questionnaire sent to all active authorised shellfish farming business in Scotland. Statistics on employment, production and value of shellfish from Scottish shellfish farms are also included.
- ◆ [DEFRA – Fish, Shellfish or Crustacean Farm Authorisation](#). This site contains information on the necessary authorisations and regulations for setting up a shellfish or crustacean farm which may be useful for you at the start of your business.
- ◆ [Seafish – Insight and research](#). This website provides information on a range of topics and sectors in the seafood industry including fishing, processing, trade and retail data.

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How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#), [Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing info@bgateway.com or by calling **0300 013 4753**



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What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please info@bgateway.com or by calling **0300 013 4753**.

Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these websites, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.



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How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) "[Find a Chartered Accountant](#)" tool

Funding

[Practical information](#) on finance and funding for starting and growing your business

Insurance

[Business insurance guide](#)

Legal Help

Gov.uk "[Licence Finder](#)" tool

Law Society of Scotland's "[Find a Solicitor](#)" tool

Pricing

Business Companion [Pricing & payment guide](#).

Please note: the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

Promotion

[BG guides to Marketing](#)

Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

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You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

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