

## **COUNTRY NOTE ON NATIONAL FISHERIES MANAGEMENT SYSTEMS – UNITED KINGDOM**

### **The UK Fishing Industry**

1. In 2002 the fishing industry in the UK had 7 033 fishing vessels, with a further 560 vessels registered in the Channel Islands and the Isle of Man. Some 686 000 tonnes of sea fish were landed into the UK and abroad by the UK fleet with a total value of GBP 546 million. In addition the UK imported some GBP 1 423 million of fish. The UK also exported fish and fish products to the value of GBP 759 million. The UK has a substantial fish processing industry of around 527 businesses which employ some 22 500 people. At the retail level there were approximately 1.4 thousand fishmongers in the year 2002. 71.8% in volume and 70.5% in value, excluding canned produce was sold through supermarkets. Fish is also consumed in restaurants and in take away form, from fish and chip shops. A small proportion of the catch is used to make fish oils and animal feeds. Some of the species caught by UK fishing vessels find a better market abroad and these species are usually exported or landed directly abroad. In 2002, UK vessels landed directly into non-UK ports 220 000 tonnes of sea fish with a value of GBP 131 million.

2. The major concentration of UK fishing activity is found in Scotland, responsible for landing 66% of the total UK volume of fish landed. Scotland also contains the seven largest ports in Britain, by weight of fish landed; Peterhead, Lerwick, Fraserburgh, Lochinver, Aberdeen, Scrabster and Mallaig.

3. The Scottish fishing industry is a significant aspect of Scotland's rural economy particularly in the North East & West Highland, Orkney and Shetland where the value of landings accounts for approximately 6% of the area's GDP. The fishing industry also generates significant additional economic activity as well for example through supplies of nets, boxes, ice and fuel. Local shipyards will also be employed for repair and maintenance work on boats and hauliers to transport their produce. Moreover, fishing impacts on the viability of services to areas as well. Evidence does suggest that some fishing communities will be very vulnerable to change. The Scottish Executive has provided GBP 10 million in transitional aid support these communities through the current round of industry restructuring.

### **Administration of the UK Fishing Industry**

4. Fisheries Departments in the UK are comprised of the Department for Environment, Food, and Rural Affairs (Defra), the Scottish Executive Environment & Rural Affairs Department (SEERAD), the National Assembly for Wales Agriculture Department (NAWAD), and the Department of Agriculture and Rural Development for Northern Ireland (DARD). Departments in the Isle of Man, Jersey and Guernsey are responsible for administering fishing activity in their respective areas.

### **The Common Fisheries Policy**

5. The primary aim of the Common Fisheries Policy (CFP) is to ensure rational and sustainable exploitation of fish stocks through conservation and management policies designed to protect resources and reflect the needs of the fishing industry. Structural policies are aimed at improving the balance between catching capacity and available resources by addressing fishing effort. Conservation policies are aimed at regulating the quantities of fish caught, through a system of Total Allowable Catches (TACs)

based on scientific advice. These TACs are allocated as quotas to Member States in accordance with fixed keys based on historic fishing rights. They are complemented by a series of technical conservation measures intended to achieve more selective fishing, for example by setting rules on minimum landing sizes, minimum mesh sizes and gear design, as well as defining areas of seasonal closures, methods of fishing and target species. Opportunities to fish in third country waters are also secured through the CFP.

### **Producer Organisations**

6. Producer Organisations (POs) are established under the CFP to enable groups of fishermen to market the fish they catch. In 1985 POs were given the opportunity to manage allocations of some whitefish stocks subject to TAC restrictions in the North Sea (Area IV) and West of Scotland (Area VI). In 1991 this opportunity was extended to TAC whitefish stocks in the English Channel and Western waters (Area VII). Since 1995, POs wishing to manage quota allocations for whitefish stocks in Areas IV, VI and VII have been required to do so for all such stocks; a similar requirement for pelagic stocks was introduced in 1999. Allowing POs to take on this management responsibility enables them to plan their uptake of their particular allocations to optimise the benefit to their members. In 2002 there were 20 POs in the UK.

### **Sea Fisheries Committees**

7. There are twelve Sea Fisheries Committees (SFCs) which regulate local sea fisheries around virtually the entire coast of England and Wales out to 6 miles. SFCs were established in the last century and are empowered to make bye-laws for the management and conservation of their districts' fisheries. In 1995 their powers were widened to include the control of fisheries in their districts for environmental reasons.

### **Statistics for Managing Fisheries**

8. Prior to 1984, all UK catch statistics were provided to the Fisheries Departments on a voluntary basis. Since that year the regulations of the CFP have required those UK vessels which account for most of the fish caught to provide to the Sea Fisheries Inspectorates of the respective Fisheries Departments, located at the main ports, information on each trip including the main species caught, the area of capture, and the quantities landed. Additional information is collected to complete, as far as possible, the coverage of fishery activity. The combined data provide the main source of catch and landings statistics for UK vessels as recorded in the tables in this publication. (For further information regarding the statistical methodology see Appendix 2 of this publication).

9. The catch and landings statistics provide a system for monitoring the uptake of the UK share of stocks for which annual TACs are set. In any year once the quota has been taken the fishery is closed.

10. Information on the fishing fleet is obtained from the Register of Shipping and Seamen, part of the Maritime and Coast Guard Agency an executive agency of the Department for Transport.

### **A description of the main fisheries where market-like instruments/incentives is in use, with respect to their biological, technical, economic and social characteristics**

11. Within the EU there is a marketing regime for fisheries products and this is currently governed by Council Regulation 104/2000 of 17 December 1999, which entered into force from 1 January 2001. This Regulation reformed the existing fisheries marketing regime to ensure that producers i.e. catchers were better able to match supply with the requirements of the market. In particular, the regulation enhances the role and structure of fish producer organisations so that they can be more active in the market while providing greater access to third country raw materials by relaxation of custom tariffs. The regulation also provides for an intervention mechanism. The UK currently has 20 Fish Producers Organisations; 10 of

which are in England, 7 in Scotland, 2 in Northern Ireland and 1 in Wales. here is also one aquaculture producer organisation in Scotland.

**Table 1.**

Number of vessels at 31 December 2002		
Mainland UK fleet		7 033
Channel Islands / Isle of Man		560
Fish landings by UK fleet		
Total	thousand tonnes	686
	million £'s	546
Abroad	thousand tonnes	220
	million £'s	131
Trade (million £'s)		
Imports		1 423
Exports		759
Fish Processing industry		
	Number of businesses	527
	Number employed	22 500
Number of fishmongers		1 400
% of fish sold through supermarkets		
	by volume	71.8
	by value	70.5
Number of producer organisations		20

**Table 2. U.K. Fishing Industry : Summary Table**  
(in GBP unless otherwise specified)

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
<b>GDP for Fishing <sup>(a)</sup></b>										
current prices	527	561	590	637	622	661	588	550	574	546
volume index (1995=100)	94.1	96.0	100.0	97.9	97.8	101.3	91.7	82.0	80.9	75.2
<b>GDP for Agriculture, Forestry and Fishing</b>										
current prices	10,544	10,617	11,766	11,735	10,145	9,628	9,478	8,801	8,241	9,384
volume index (1995=100)	102.5	101.2	100.0	99.1	98.2	99.9	103.1	99.8	89.2	92.4
<b>GDP</b>										
current prices	642,327	681,327	719,176	762,214	811,067	859,384	902,459	950,415	993,124	1,043,301
volume index (1995=100)	92.9	97.2	100.0	102.6	106.2	109.3	111.9	115.3	117.8	119.9
<b>GDP for Fishing as % of Ag, Hunting, F'try &amp; Fishing</b>										
current prices	5.0%	5.3%	5.0%	5.4%	6.1%	6.9%	6.2%	6.2%	7.0%	5.8%
<b>Gross value added at 1995 basic prices for processing and preserving of fish and fish products <sup>(b)</sup></b>										
index (1995=100)	99.1	101.5	100.0	95.1	76.2	74.4	78.3	77.8	78.6	77.4
<b>Fleet size at end of year <sup>(c)</sup></b>										
(no. of vessels)	11,108	10,297	9,174	8,073	7,812	7,639	7,448	7,242	7,169	7,033
<b>Employment</b>										
(no. of fishermen)	nd	20,703	19,921	19,044	18,604	17,889	15,961	14,894	14,645	12,746
<b>Total landings by UK vessels <sup>(d)</sup></b>										
quantity ('000 tonnes)	857.6	874.9	911.8	892.3	891.3	923.8	836.2	748.1	737.8	685.5
value	526.0	561.4	590.1	636.5	621.9	661.5	587.6	550.3	574.4	545.6
<b>Imports</b>										
quantity ('000 tonnes)	442.3	457.6	484.7	533.2	503.2	532.8	552.0	546.7	625.6	619.7
value <sup>(e)</sup>	968.2	1011.6	1124.0	1213.4	1055.2	1065.5	1301.6	1324.8	1432.4	1422.8
<b>Exports</b>										
quantity ('000 tonnes)	376.0	372.2	362.1	310.4	299.8	346.1	351.4	364.9	384.6	388.3
value <sup>(e)</sup>	545.6	637.0	697.2	700.8	605.2	743.7	746.3	696.0	731.9	758.8
<b>Household Consumption</b>										
('000 tonnes) <sup>(f)</sup>	435.7	440.3	438.8	470.9	448.0	450.0	445.5	442.4	492.0	491.5
<b>Consumers Expenditure</b>										
on Fish <sup>(g)</sup>	1,734	1,699	1,790	1,961	1,947	2,009	2,072	2,156	2,255	2,368
on Food <sup>(h)</sup>	47,171	47,855	49,790	53,025	53,832	55,192	56,625	57,719	60,340	61,711
Fish as a % of Food <sup>(h)</sup>	3.7%	3.6%	3.6%	3.7%	3.6%	3.6%	3.7%	3.7%	3.7%	3.8%
<b>Landed Price Index <sup>(i)</sup></b>										
	114.7	118.9	116.0	123.3	122.6	138.3	144.1	148.6	156.4	153.1
<b>Retail Price Index <sup>(j)</sup></b>										
	125.4	122.8	123.1	123.1	125.3	135.7	147.8	151.0	153.4	157.9

Source:- Fisheries Departments in the UK, H.M. Customs and Excise, Expenditure and Food Survey, Office for National Statistics

(a) GDP for fishing includes landings abroad.

(b) Year-on-year comparisons may be affected by changes in the industrial classification of some contributors. For most businesses data are appropriate to a single activity heading; where information covers a mixture of activities, the business is classified according to the main activity.

(c) The number of vessels excludes those registered in the Channel Islands and Isle of Man.

(d) The quantity of landed fish is expressed in terms of liveweight. The figures relate to landings both into the UK and abroad.

(e) Imports are valued at cost, including insurance and freight terms whereas exports are valued at free on board terms.

(f) Data is derived from the National Food Survey prior to 2001, and from the Expenditure and Food Survey for 2001 onwards.

(g) Figures have been revised since 2001 edition.

(h) Including non-alcoholic beverages.

(i) The landed price index has been calculated on an annual basis with 1987 = 100

(j) The fish component of the RPI which includes canned and processed fish. The Index is calculated on a monthly basis with January 1987 = 100

**Table 3. Fish Landings in the United Kingdom and Abroad (a)**

	1998	1999	2000	2001	2002	1998	1999	2000	2001	2002
<b>(5) Total: UK Vessels</b>										
(i) United Kingdom and Abroad										
Brill	0.5	0.4	0.5	0.5	0.5	2.1	2.0	2.3	2.5	2.2
Catfish	0.9	0.9	0.9	0.7	0.6	1.3	1.2	1.2	1.0	0.9
Cod	77.2	51.7	41.8	32.8	31.6	83.9	68.4	56.5	43.5	42.1
Dogfish	9.8	9.1	9.8	11.1	9.4	6.9	6.4	7.3	8.6	7.4
Haddock	83.4	72.0	50.7	42.9	52.9	57.7	59.9	51.6	36.8	35.5
Hake	5.2	5.5	4.5	2.8	2.7	14.0	13.4	9.8	6.6	7.1
Lemon Soles	5.2	5.0	4.4	4.0	2.7	11.8	11.4	10.8	11.0	8.4
Ling	13.6	11.4	9.2	8.1	8.4	13.0	11.3	9.7	9.2	9.1
Megrims	6.5	5.6	5.5	4.7	4.4	11.4	10.7	10.1	7.9	9.0
Monks or Anglers	21.7	17.0	16.6	18.8	15.8	45.9	39.4	37.7	43.1	34.9
Plaice	23.5	20.4	23.7	21.9	19.6	27.3	27.6	24.6	25.0	22.4
Pollack (Lythe)	3.2	2.4	2.7	2.8	2.8	3.2	3.0	3.5	3.6	3.3
Saithe	12.3	12.4	10.9	10.6	12.3	6.3	6.0	4.5	4.8	5.3
Sand Eels	29.1	14.1	16.5	1.3	3.7	2.0	0.6	0.7	0.1	0.2
Skates and Rays	7.6	6.3	6.5	6.4	6.1	7.3	6.2	7.0	7.0	6.2
Soles	2.6	2.8	2.5	2.7	2.6	17.0	18.2	15.0	17.4	15.6
Turbot	1.0	0.9	0.9	1.0	1.1	5.7	5.7	5.0	5.9	6.7
Whiting	27.2	25.6	23.5	15.3	11.5	13.7	14.1	14.4	10.0	6.7
Whiting, Blue	99.0	106.5	45.1	51.9	28.9	7.5	4.2	2.3	2.9	2.4
Witches	3.9	3.7	4.1	4.5	3.9	4.9	4.9	5.6	6.2	5.8
Other Demersal <sup>(b)</sup>	23.5	24.8	20.7	25.3	21.2	29.4	28.1	22.6	28.0	26.2
<b>Total Demersal</b>	<b>456.7</b>	<b>398.6</b>	<b>301.0</b>	<b>270.3</b>	<b>242.5</b>	<b>372.2</b>	<b>342.8</b>	<b>302.3</b>	<b>281.1</b>	<b>257.2</b>
Herring	104.6	104.8	82.8	81.4	72.9	15.3	14.4	10.8	22.5	14.7
Horse Mackerel	32.8	21.0	17.1	19.6	12.3	7.7	4.5	4.1	4.9	3.0
Mackerel	179.7	166.7	193.8	199.0	200.4	87.6	42.0	60.8	81.6	93.3
Pilchards	6.9	4.8	4.4	10.4	9.4	1.0	0.8	0.9	2.5	1.9
Sprats	7.0	15.2	8.3	5.1	5.8	1.2	2.1	1.0	0.6	0.7
Tuna	0.1	0.3	..	..	..	0.2	0.4	..	..	..
Other Pelagic	3.2	1.0	5.3	8.3	4.5	0.8	0.3	0.9	2.1	0.9
<b>Total Pelagic</b>	<b>334.4</b>	<b>313.8</b>	<b>311.8</b>	<b>323.7</b>	<b>305.3</b>	<b>113.8</b>	<b>64.4</b>	<b>78.5</b>	<b>114.2</b>	<b>114.4</b>
Cockles	12.1	14.2	20.3	19.0	14.3	4.2	2.5	3.0	3.8	4.2
Crabs	29.9	25.3	27.2	27.0	26.4	36.3	30.0	33.0	30.7	30.1
Lobsters	1.6	1.8	1.3	1.1	1.2	14.6	15.0	12.6	11.6	11.8
Mussels	12.7	8.4	7.5	14.9	17.2	3.5	2.1	1.4	4.8	4.5
Nephrops	29.2	31.3	28.5	28.5	28.5	58.1	75.0	61.5	69.0	69.2
Periwinkles	2.0	1.2	1.1	0.8	0.2	1.9	1.2	1.1	0.8	0.2
Queens	8.1	5.9	5.3	8.7	10.8	2.9	2.6	2.3	3.7	4.2
Scallops	20.1	19.1	19.7	19.5	18.8	30.2	29.2	30.8	29.9	28.0
Shrimps	2.8	3.3	2.1	3.4	1.8	3.2	7.0	2.5	4.2	2.8
Squids	6.6	5.3	7.5	5.9	5.2	12.9	10.3	12.6	11.3	10.1
Other Shellfish	7.7	8.1	14.9	15.0	13.2	7.7	5.5	8.7	9.3	9.0
<b>Total Shellfish</b>	<b>132.7</b>	<b>123.9</b>	<b>135.4</b>	<b>143.8</b>	<b>137.6</b>	<b>175.4</b>	<b>180.4</b>	<b>169.5</b>	<b>179.1</b>	<b>174.0</b>
<b>Total All Species</b>	<b>923.8</b>	<b>836.2</b>	<b>748.1</b>	<b>737.8</b>	<b>685.5</b>	<b>661.5</b>	<b>587.6</b>	<b>550.3</b>	<b>574.4</b>	<b>545.6</b>

Source:- Fisheries Departments in the UK

(a) Landing data include transshipments.

(b) Includes fish roes and livers.