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FISHERIES

FISHERIES IN THE UNITED KINGDOM

NOTE

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FISHERIES IN SOUTH-WEST OF ENGLAND

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THE SOUTH WEST - KEY FACTS

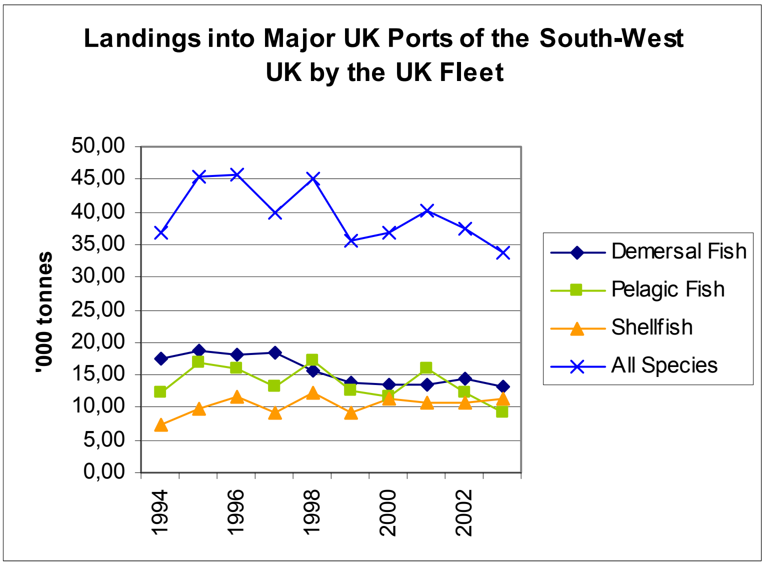
- The South West is largest of the 9 English regions (23,837 sq km – more than 18% of England).
- The South West peninsula extends over 350 km from the south-western tip of Cornwall to the northern border of Gloucestershire and the eastern borders of Dorset and Wiltshire.
- In the South West there are 10 Unitary Authorities and 6 County Councils. The latter contain 35 District Councils.
- The South West has a total population of almost 5 million (around 10% of the English total).
- It has the lowest population density of any English region (210 persons per sq km - the English population density is 383 persons per sq km). There is a great variation in population density across the region, ranging from Bristol, (3577 persons per sq km) to West Devon district (43 persons per sq km).

1. EMPLOYMENT IN FISHERIES

According to statistics from DEFRA (the UK Department for Environment, Food and Rural Affairs), there were, in 2003, 815 fishermen in the South-west, of which 618 were full-time (76%) and 197 part-time. Nevertheless, documents from the Task Force Strategy for the Cornwall and Isles of Scilly Fishing Industry estimate the number of fishermen in Cornwall at 1,148 and correspond with the figures of the Cornwall Sea Fisheries Committee Audit of 1999. This figure was a 21% higher than the figures from DEFRA for 1999. In any case, according to DEFRA figures, 7% of the fishermen of the United Kingdom work in the South-West, although this percentage rises to 8% if part-time employment is raken into account.

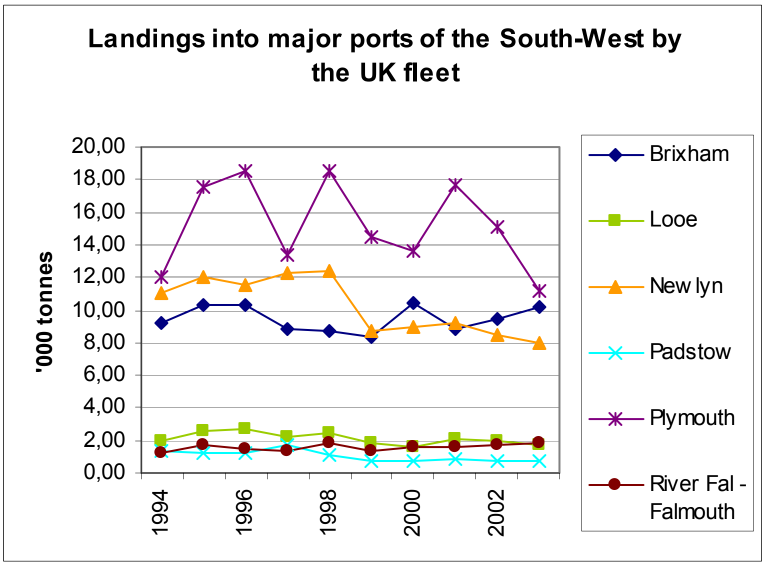
Since 1999, the number of fishermen has been reduced by 17%. The reduction is much greater for part-time fishermen (23%), while the reduction in full-time fishermen was of 15%.

2. LANDINGS



Landings of fish in the ports of the South-West represent 8% of the total in the United Kingdom. However, its share in the value of catches rises to 13%. All major ports in South-West have experienced a decline in terms of tonnes of fish caught. Although landings of pelagic and demersal species have progressively declined, landings of shellfish show a steadily increase.

The chart shows the change in landings in the main ports of the South-West. There are two groups of ports by the size of landings. The ports with greater landings are Plymouth, Brixham and Newlyn. The ports of Falmouth, Looe and Padstow are less significant.

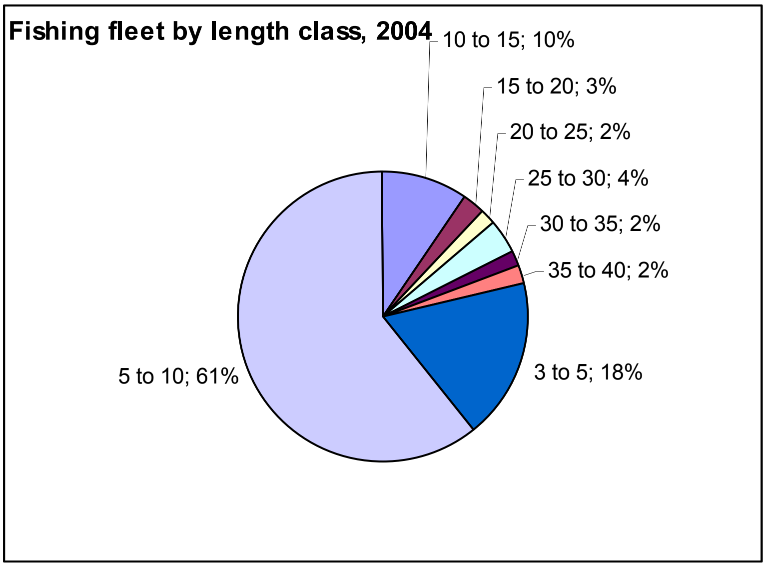


Newlyn, in Mount's Bay, Cornwall, has been the South-West's premier fishing port for more than 100 years. It is the largest port in England, Wales and Northern Ireland by value of landings. It is estimated that the returns made by merchants selling the fish is 10%.

A clear specialisation appears between the ports in function of the species landed. In Newlyn and Padstow landings of demersal species predominate. However, landings in Plymouth are almost monopolised by pelagic species. In Brixham landings of pelagic species and shellfish are the more significant. In Falmouth and Looe various species are landed, although landings of pelagic species in Falmouth have practically disappeared since 1999.

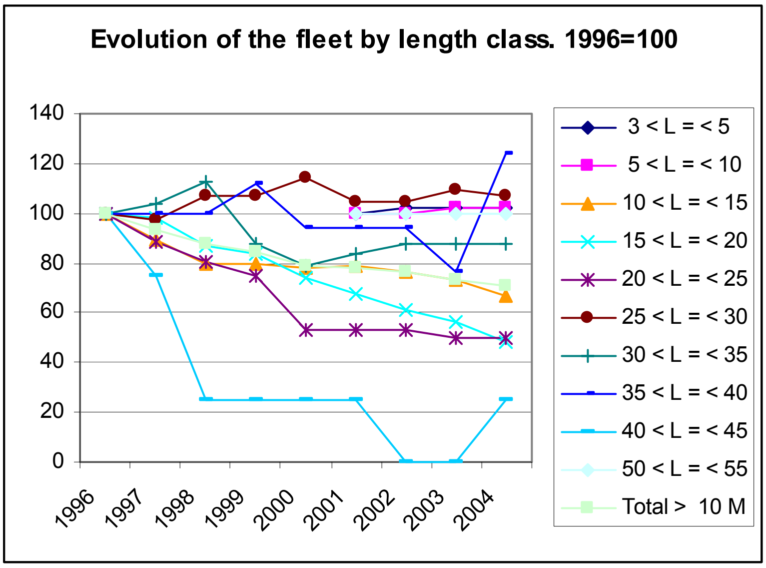
3. FISHING FLEET

To study the fishing fleet, two alternatives methods are available. The "Community Fishing Fleet Register" and the "English, Welsh and Northern Irish Fishing Vessel List". However, to analyze the fleet from a regional perspective, the "Community Fishing Fleet Register" is not useful. This is due to the fact that the information transmitted by the United Kingdom to the Commission is based on the registration port system. The problem is that Newlyn, one of the main fishing ports of the South-West is not considered to be a registration port. For this reason, the "English, Welsh and Northern Irish Fishing Vessel List" for the administrative ports of Brixham, Newlyn and Plymouth is used.



In 2004 the fishing fleet was made up of 1170 vessels, of which 251 vessels have a length greater than 10 metres (21%). The chart shows the distribution of the fishing fleet by length. Furthermore, there is a vessel with 40.75 metres of length and two vessels of 51.44.

49% of the vessels of >10 metres are based in ports depending on the administrative port of Newlyn, while 29% depend on Brixham and 23% on Plymouth.



Since 1996 the fleet has been reduced by 29%. The chart shows the reduction in the fleet by length. Increases appear only in the length classes of 25 to 30 metres and of 35 to 40 metres. The greater reduction has occurred in the ports dependent on Plymouth (35%) and Newlyn (33%), while in Brixham the fishing fleet has been reduced by 13%.

Length class	Average GRT	Total GRT	% Total
3 < L = < 5	1	195	1%
5 < L = < 10	4	2.954	10%
10 < L = < 15	18	2.004	7%
15 < L = < 20	75	2.252	8%
20 < L = < 25	119	2.135	7%
25 < L = < 30	136	6.117	21%
30 < L = < 35	227	4.762	16%
35 < L = < 40	318	6.679	23%
40 < L = < 45	381	381	1%
50 < L = < 55	1064	2.127	7%

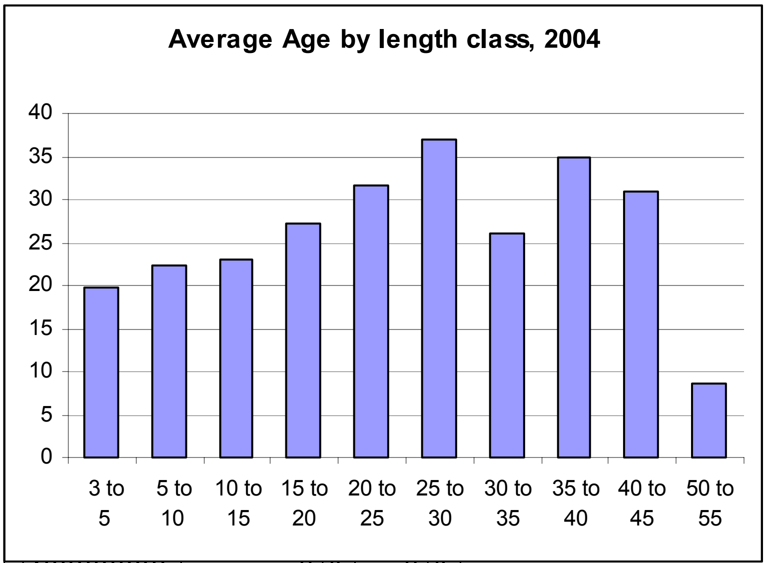
The table shows the distribution of GRT by overall length. The vessels between 5 and 10 metres of overall length keep a significant share, although 60% of the GRT corresponds to vessels of between 25 and 40 metres of length.

Due to the absence of data on the engine power of a significant number of vessels in the higher length classes, it is not possible to analyse the engine power of the vessels.

	Vessel capacity units			
Length class	Average VCU	Total VCU	% Total	Growth average 1996-2004 *
3 to 5	13	2.653	2%	1%
5 to 10	49	34.496	32%	3%
10 to 15	125	14.121	13%	9%
15 to 20	202	6.062	6%	12%
20 to 25	265	4.774	4%	-2%
25 to 30	396	17.819	17%	-1%
30 to 35	521	10.937	10%	0%
35 to 40	618	12.988	12%	-3%
40 to 45	743	743	1%	4%
50 to 55	1.569	3.137	3%	0%
Total	92	107.732	100%	
* For 3 to 5,.5 to 10 and 50 to 55, Growth 2001/2004				

However, the information relating to Vessel Capacity Units[1] is more complete. The increase of VCU in vessels between 10 and 20 metres of length is relevant. This suggests that the viability of this type of vessels has permitted investments addressed to increase the fishing effort.

The average age of the fishing fleet is 24 years. However, there are significant differences by the length classes. Nevertheless, it is necessary to take into account that in the length classes below 10 metres there is a certain lack of information. The absence of renewal in the length class between 30 to 35 metres matches with a reduced rate of affiliation to producers' organisations. This would appear to indicate that the economic viability of this type of vessels is less than that pertaining to the fishing fleet as a whole.



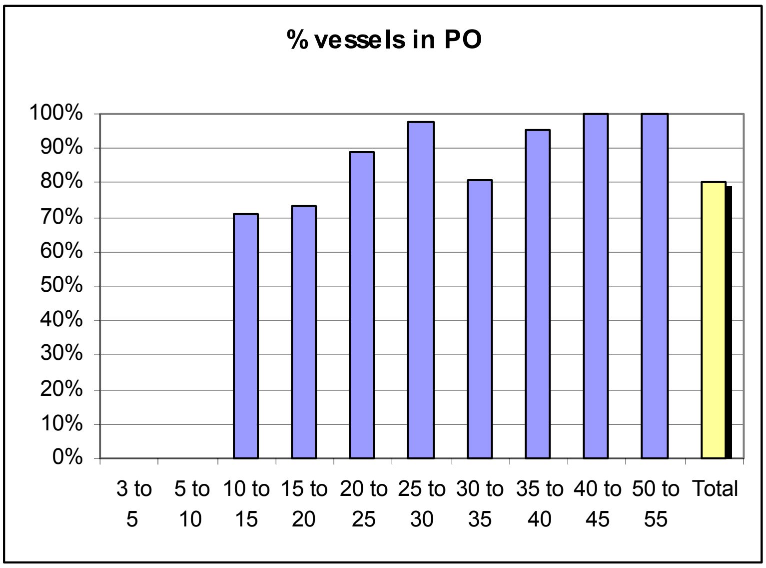
Fibre Glass	12%	57%
Steel	53%	14%
Wood	31%	24%
Unknown	3%	4%

Fibre-glass is the material most used in the vessels of the fishing fleet (57%). However, in vessels of more than 10 metres of length, steel is the most generalised material (53%). The use of fibre-glass has been increased in the smaller vessels (less than 10 metres in length) and in vessels with lengths of between 15 and 20 metres. 30% of this type of vessel have hulls of fibre-glass, replacing the use of wood. However, in vessels between 10 and 15 metres of length the use of the fibre-glass is also being increased. The number of vessels with wooden hulls in these categories is thus being reduced. However, in vessels with lengths between 20 and 25 metres, the percentage of vessels with wooden hulls has increased, while that of the vessels with steel hulls is being reduced. The anomalous situation for the length classes 10-15 and 20-25 is due to the fact that these length classes suffered greater reductions in the number of their vessels between 1996 and 2004 (around 50%).

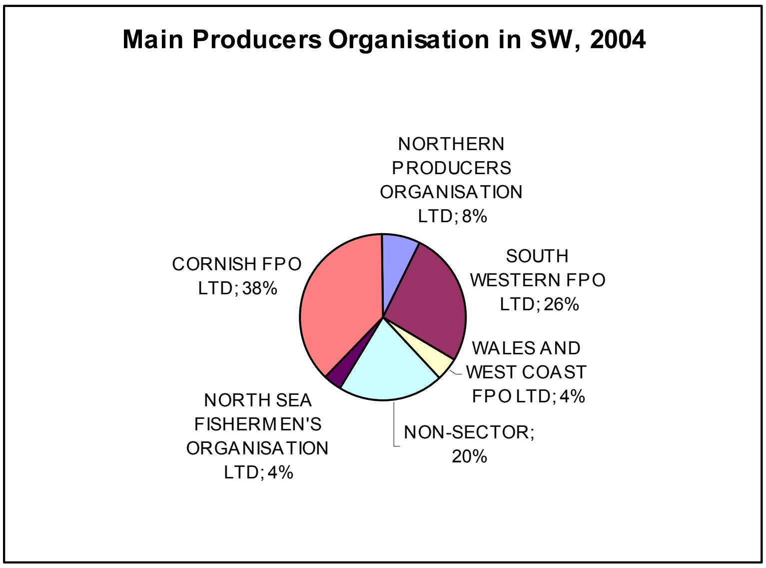
[1] VCU defined as: [vessel length x vessel width] + [0.45 x engine power (in kilowatts)]

4. PRODUCERS ORGANISATIONS

Producer Organisations 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 the South-West, 80% of the vessels are associated with a Producers Organisation. The degree of association is actually higher than in the total of England, Wales and Northern Ireland. In general, the vessels with length below 10 metres are not associated with any Producers Organisation. However, most of the larger vessels are associated with Producers Organisations. The increasing trend in the degree of association is cut in the length class from 30 to 35 metres.



The chart shows the share of the main Producers' organisations. Although it has a modest share, the progression of Northern Producers Organisation Ltd is relevant.

5. FURTHER DEVELOPMENTS

5.1. Objective One Partnership for Cornwall and Scilly

The "Objective One Partnership for Cornwall and Scilly" created the "CORNWALL & ISLES OF SCILLY FISHING INDUSTRY TASK FORCE STRATEGY 2000 – 2010". The mission statement was to ensure the long term economic viability and sustainability of the region's fishing industry and fishing communities and to increase the value of fish to Cornwall by 40%.

The Fisheries Task Force has identified eight key strategic projects, under the sectors identified below, which will be taken forward in 2002. These projects are to:

1. Commission an ocean recovery plan to identify the future sustainability of all fish stocks in the fishing grounds used by the regions vessels, the economic impact on Cornwall and to identify future conservation measures (gear techniques / closed areas etc).
2. Provide a dedicated training advisor / coordinator for West Cornwall and the Isles of Scilly.
3. Undertake a socio-economic analysis of the fishing industry.
4. Develop a self-financing resource centre.
5. Provide infrastructure improvements and new premises for fish processing.
6. Develop a Seafood Cornwall quality scheme/kite mark.
7. Develop infrastructure projects identified by the Newlyn Regeneration study.
8. Investigate and encourage the provision of a plant to process fish waste.

5.2. Securing the Benefits

By June 2005, the Prime Minister backed a plan developed by the four fisheries administrations of England, Scotland, Wales and Northern Ireland, aimed at establishing more profitable and sustainable sea fisheries. The publication, "Securing the Benefits", follows the Net Benefits guidelines report made public in 2004 by the Prime Minister's Strategy Unit and sets out a list of measures geared towards ensuring future UK sustainable fisheries.

The document recommends:

- simpler and more regional-oriented rules maximizing the work contribution of Regional Advisory Councils members be applied in the European Union's (EU) Common Fisheries Policy;
- a better use of fishermen's information in fish stock evaluations; improved communication with the regional fishing industries on pinpointing fleet needs for increased profitability and selective decommissioning;
- improved transparency on quota ownership information useful for future individual business planning;
- and financial assistance in helping the industry apply to the Marine Stewardship Council or other organisations for certification validating the sustainability of certain fisheries.

5.3. Invest in Fish

Invest in Fish South West is a stakeholder led project launched on April 2004, that seeks to develop a regional strategy for managing fisheries in the Celtic Sea, English Channel and Western Approaches that improves fish stocks in a way that will benefit the marine environment, regional economy and local communities. The project has released four reports in May 2005.

- Imagining Change: A Survey of South West Fishermen - by Invest in Fish South West
- The Motivation, Demographics and Views of South West Recreational Sea Anglers and their Socio-economic Impact on the Region by Nautilus Consultants
- Analysis of the Interactions between Fishing and Marine Mammals by The Sea Mammal Research Unit, SMRU
- Analysis of the Legal and Institutional Policies Relating to South West Fisheries by The Institute of European Environmental Policy (IEEP)

Relevant biological, economic and social data collected from these reports will also be inputted into the Invest in Fish South West's bio-economic model being developed by The Centre for the Economics and Management of Aquatic Resources at the University of Portsmouth, Cemare, and The Centre for Environment, Fisheries and Aquaculture Science, CEFAS. This bio-economic model is aimed at testing the social, economic and environmental implications of different management options on behalf of Invest in Fish South West.

6. CONTROVERSIAL ISSUES

6.1. FIFG funding

The past record of UK matching funding compares very poorly with many other countries, and FIFG money is correspondingly low. This is at least partly the result of the imposition of Treasury spending rules.

The result of the Fontainebleau Agreement is that it’s in the interest of the Treasury to keep the 60% back rather than having no control over the 100% spent. The agreement has therefore provided a disincentive for the UK to draw down EU funding.

6.2. Risks to Cornish Dolphins

In October 2004, the Cornwall Sea Fisheries Committee (CSFC) adopted the decision to take no further action on a report setting out the risk posed by inshore gillnets to the bottlenose dolphins.

6.3. Pair trawling in the western Channel

An Order was made on 22 December 2004 closing the pelagic bass pair trawl fishery in the western Channel within 12 miles of the coast of England to reduce cetacean bycatch. An amendment Order was made on 13 January 2005 to ensure smaller pair trawlers may continue to participate in a fishery for which no dolphin bycatch had been identified.

Work by the Sea Mammal Research Unit, funded by DEFRA, conducted trials into the use of exclusion grids in order to to try to reduce bycatch. The research showed that there is no easy or early technical solution to reducing the bycatch in this fishery through the use of such devices. The Order will only affect those using pelagic pair trawls targeting bass within 12 miles of the coast of England within ICES area VIIe. Other bass fisheries, such as gillnetting and hand lining, and pair trawl fisheries targeting other species will be able to continue.

6.4. North Sea fish on the move to cooler waters

According to a study by climate change scientists of University of East Anglia and researchers at the Centre for Environment Fisheries and Aquaculture Science, global warming has forced fish stocks in the North Sea scores of miles north to cooler waters. Major fish species, including cod and haddock, have sought out cooler waters in response to a 1º C rise in the temperature of the North Sea over the past 25 years. In the same period, more exotic southern species have encroached on North Sea waters and established themselves.

6.5. Seasonal closures

The local industry had campaigned for an area of the Trevose fishing ground to be shut down for three months to all but the smallest boats. The EU banned small boats less than 10 metres long.

Padstow will be particularly affected since the Trevose ground is just a few minutes away from the harbour and now boats will have farther to go to fish. Larger vessels, able to move easily away from the Trevose ground, are not so badly affected.