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Review of Fisheries in OECD Countries
Policies and Summary Statistics 2008
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PART III

Chapter 18

United Kingdom

Main characteristics of the UK fishing sector

In 2005, UK Fisheries Administrations initiated the Quota Management Change Programme. The aim of the programme is to deliver the benefits of individual quota holdings and transferability, in particular increased certainty about individual fishing rights and improved transparency in quota trading. It is due to report after three years.

In September 2005, UK Fishery Departments introduced a scheme of registration for buyers and sellers of first sale fish and designation of fish auction sites. Cross checking these sales notes with landings data will improve the monitoring and control of landings of fish taken from European Community and other waters, and ensure that such landings are properly recorded and capable of verification. The measures will also satisfy consumers and those involved in secondary processing or distribution of fish regarding the provenance of fish and that it has been legitimately caught.

In January 2005, a ban was introduced on all UK registered vessels pair trawling in area VIIe, up to 12 miles in order to reduce cetacean bycatch.

In January 2006, under the Restrictive Shellfish Licensing Scheme all vessels under 10 m in England and Wales are now required to complete a monthly shellfish activity return.

In the UK, over 95% of quotas in EU waters are allocated through Producer Organisations ("the sector"). The remaining quota is divided between the "non-sector" (vessels over 10 metres in overall length but not members of a producer organisation) and the under 10 metre fleet. In 2004 and 2005, guaranteed minimum allocations continued to apply to a range of quota allocations for the non-sector and vessels of 10 metres and under.

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United Kingdom – Summary statistics

Figure III.18.1. **Harvesting and aquaculture production**

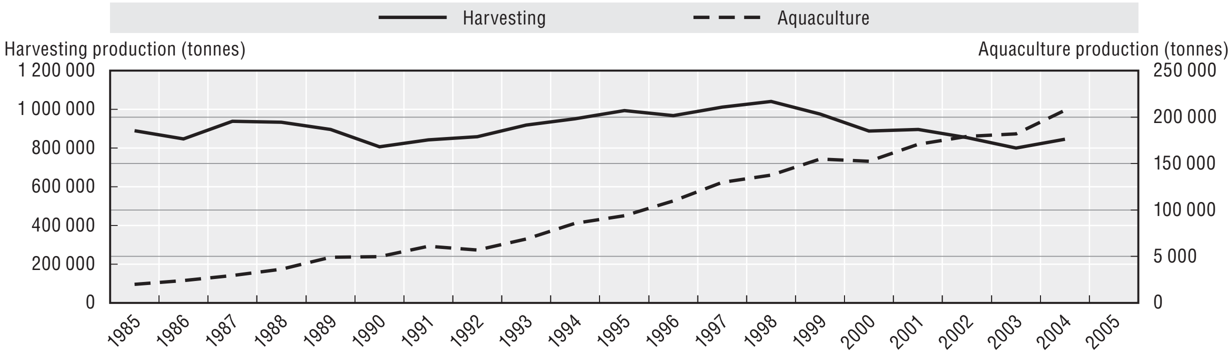

Figure III.18.2. **Key species landed by value in 2005**

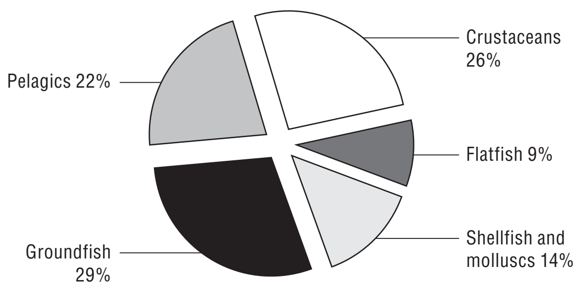

Figure III.18.3. **Age structure of fishers**

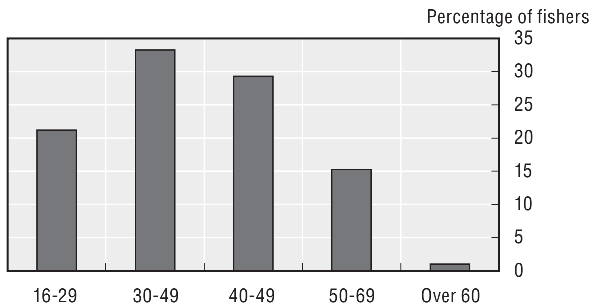

Figure III.18.4. **Evolution of government financial transfers**

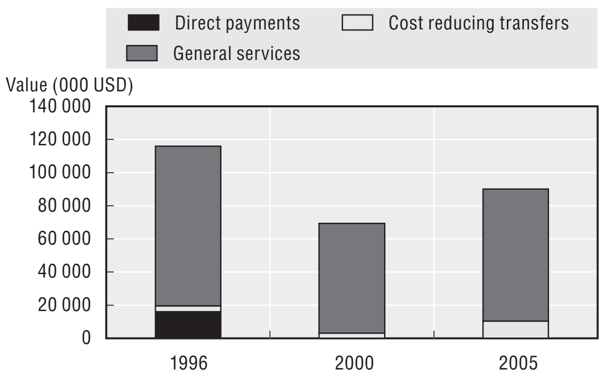

Figure III.18.5. **Trade evolution**

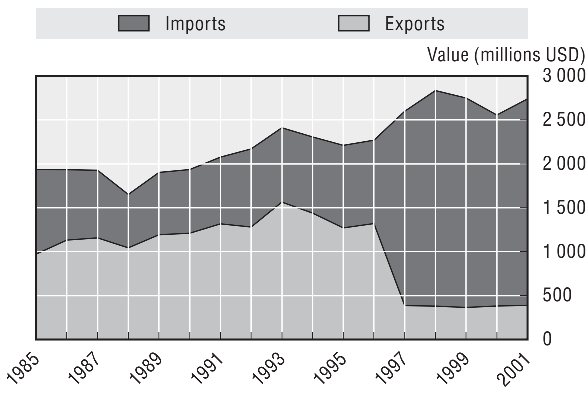

Figure III.18.6. **Production profile**

	1996	2005
Number of fishers	19 044	12 647
Number of fish farmers	n.a.	n.a.
Total number of vessels	8 648	6 722
Total tonnage of the fleet	251 761	218 134

n.a.: Not available.

Source: Figures III.18.1 and III.18.5: FAO; Figures III.18.2, III.18.3, III.18.4 and III.18.6: OECD.

ADDITIONAL DETAILS

Legal and institutional framework

Responsibility for fisheries in the United Kingdom lies with the Secretary of State for Environment, Food and Rural Affairs, Scottish Ministers, the Minister of the Welsh Assembly Government and Northern Ireland Ministers.

Any person wishing to fish under the British flag and against UK quotas may do so only with a fishing vessel which is both registered and licensed by the UK authorities. In order to register a fishing vessel, the owners should be UK citizens, EU citizens established in the UK or companies incorporated within the EU with a place of business in the United Kingdom. Owners of all vessels fishing against the UK's quotas have to maintain a genuine economic link with the UK. This may be achieved through landing quota catches into the UK, employing crew resident in the UK or other measures sufficient to ensure that a satisfactory economic link is achieved.

As a condition of registration all fishing vessels must be managed, controlled and directed from the UK. A restrictive licensing scheme operates and no new licences are issued by the UK authorities. Anyone wishing to fish for profit must acquire a licence from an existing fishing vessel.

Capture fisheries

Employment, structure and performance of the fleet

In 2005, approximately 12 467 fishers were employed in the fish catching sector, approximately 806 fewer than in 2004. This fall was accounted for by a drop of 136 employed in part-time fishing and a drop of 670 employed in full-time fishing. In 2003 there were 11 774 people employed in the sector: 972 less than in 2002.

At the end of 2005, 6 706 vessels were in the UK (excluding the Isle of Man and Channel Islands) fishing fleet, 311 fewer than at the same time in 2004. The registered gross tonnage of the fleet fell by just over 2% to 218 134 mt in 2005. There were 5 571 vessels of less than 12m in length in 2005 (4.5% less than in 2004) and the number of vessels of over 12 m in length went down by 2.6% to 1 151.

Landings

The volume of total landings by UK vessels in domestic ports remained relatively stable in 2004 and 2005 at around 460 000 mt, though the value of landings increased by 12% from GBP 405 million in 2004 to GBP 450 million in 2005. Despite the increase in the value of fish landed, profitability remained poor in many sectors (particularly the white fish fleet) given the increases in the price of fuel.

In 2005, flatfish accounted for 9% of all landings by value, groundfish accounted for 30%, pelagic fish 22%, crustaceans (including lobster and shrimp) 26% and molluscs (including scallops, mussels and squid) 14%. By value, the key species listed below accounted for around two thirds of all landings by UK vessels in the UK:

- Sole and plaice are the two key flatfish species. Landings of sole by UK vessels into UK ports declined by 11% to 1 818 mt in 2005 compared to 2004, although the value of these landings remained relatively constant at around GBP 13 million. The quantity of plaice landed in the UK declined by 6% though the value of landings also remained the same at around GBP 4 million.

- Of groundfish, cod and haddock are the two key species. The quantity of cod landed declined by 9% to 13 759 mt in 2005, while the value of landed fish was only 4% lower at GBP 21.8 million. Compared to 2004, landings of haddock increased by 4% to 47 342 mt in 2005 and the value of haddock landed increased by more than 15% to GBP 37.7 million.
- Mackerel and herring are the two key pelagic species. While the quantity of mackerel landed declined by over 18% to 94 000 mt in 2005, the value of landings increased by more than 37% to 78.2 million in 2005. The price of herring has also been rising: the quantity of herring landed increased by 31% to 73 800 mt in 2005, while the value of landings more than doubled to over GBP 16 million.
- Nephrops and lobster are the two key crustacean species. Landings of nephrops increased by 10% to 33 600 mt in 2005 while the value of landings increased by nearly 19% to GBP 84 million. The value of lobster landed went down by 10% to GBP 11.4 million in 2005.
- Scallops are the key species of mollusc: whilst the quantity of scallops landed declined by 3.5% to 20 300 mt in 2005, the value of landings increased slightly to just less than GBP 32 million.

Landings by UK vessels into foreign ports increased by 9% from 192 000 mt in 2004 to 210 000 mt in 2005, though the value of these landings decreased slightly from GBP 107 million in 2004 to GBP 106 million in 2005.

Between 2004 and 2005, landings by foreign vessels into domestic ports increased by more than 20% to around 147 000 mt; the value of these landings increased by nearly 48%. This increase was largely due to an increase in cod landings.

Resource management

During 2004 and 2005, the government continued to operate a restrictive licensing scheme in which licences were used to control the number of vessels fishing and stocks caught. Capacity reduction penalties were applied where licences were transferred or aggregated. These licence arrangements contributed to the UK's MAGP objectives.

Fisheries science

UK government funding of marine fisheries R&D was GBP 4.6 million in 2005/06 compared to GBP 5.4 million in 2004/05. Funding for fisheries monitoring was GBP 12.8 million in 2005/06 compared to GBP 12.4m in 2004/05.

Enforcement and control

The Fisheries Departments in the UK continued to give high priority to fisheries control and enforcement and in 2005 spent some GBP 26.2 million on an integrated programme of aerial, surface and port surveillance, compared to an equivalent figure GBP 24.2 million in 2004. From 1 January 2004, the requirement for UK fishing vessels to carry satellite monitoring terminals and submit regular position reports was extended to vessels over 18 metres in overall length. The further extension of this requirement to vessels over 15 metres overall length took effect from 1 January 2005.

Aquaculture

Production facilities

Aquaculture production in the UK is concentrated on Atlantic salmon, rainbow trout and mollusc shellfish, such as mussels and Pacific Oysters. Pilot trials of farming non-salmonoid finfish species such as turbot, halibut, cod and sea bass, have produced encouraging results. With the exception of some new fish farms based on re-circulation, technology and production facilities have changed little since 1997. There are more than 1 000 fish and shellfish farming businesses in the UK operating on 1 400 sites and directly employing more than 3 000 people (some 2 500 in Scotland). The total estimated employment figure rises to over 6 000 when transportation, marketing and processing activities are taken into account.

Production volume and values

Overall production of aquaculture products for 2004 was nearly 200 000 mt. This was made up of 160 000 mt of salmon (mainly in Scotland), 16 000 mt of rainbow trout and around 22 000 mt of molluscan shellfish (80% in England and Wales). The total value at first sale of aquaculture products in 2004 was in excess of GBP 350 million.

Policy development

The aim of Fisheries Administrations is, "a fishing sector that is sustainable and profitable and supports strong local communities, managed effectively as an integral part of coherent policies for the marine environment". A summary of policy measure to meet this aim are described at the start of this document.

Fisheries and the environment

Since 1999, the only type of waste that is routinely considered for disposal at sea around the coast of the UK is material dredged from ports and harbours and small quantities of fish waste. Strict licensing controls operate under the Food and Environment Protection Act (FEPA). The purpose of this licensing regime is to protect the marine environment and to prevent interference with other uses of the sea (including fishing). Before issuing a licence for sea disposal, the licensing authority is required to have regard to the practical availability of any alternative ways of dealing with the material and applicants are required to investigate the possibility of using some or all of the material beneficially, for instance, for beach replenishment or for salt marsh regeneration. Sea disposal is also considered only after a rigorous scientific assessment of the impact of the material on the marine environment.

FEPA also controls a wide range of construction works undertaken at sea. These controls are central to the application of the UK government's policy of sustainable development in the marine sector. When considering an application for consent, the licensing authority has to weigh the perceived socio-economic benefits of the project against the potential impact upon the environment and loss of natural resources and other assets, including fishing. Schemes to offset rising sea levels and to produce renewable energy (offshore windfarms) are examples where detailed scientific evaluation is necessary to minimise any adverse environmental effects upon fisheries and indeed may even offer stock enhancement opportunities.

The discharge of radioactive waste into the marine environment is also strictly controlled by national legislation. Sites are regularly inspected and authorisations reviewed to ensure that discharges are kept as low as is reasonably achievable.

Since the introduction of the Environment Act 1995, sea fisheries regulators have had the power to manage fisheries for environmental as well as for traditional fisheries management purposes. In 2003, in respect of the regulation of fisheries for marine environmental purposes, national powers were used to introduce The Fal and Helford (Prohibition of Scallop Dredging) Order 2003 (SI 2003/2513) to protect a vulnerable habitat from the impact of damaging fishing gear. In January 2005, a ban was introduced on pair trawling in area 7E, in the coastal zone out to 12 miles, to reduce cetacean bycatch.

No significant environmental issues arose in connection with aquaculture in 2004/05. Fish farm effluents are monitored by the Environment Agency which enforces strict discharge consents to protect the quality of receiving waters.

Processing, handling and distribution

During 2003, there was a 13% decrease in the total supply of fish available for domestic use, which was largely due to a 23% increase in the amount of fish exported.

Government financial transfers

Provision of government aid to the fishing industry in the UK is under the EU 2000-06 Financial Instrument for Fisheries Guidance (FIFG) Programme. The European Fisheries Fund will replace the FIFG fund from 2007 to 2013.

Vessel modernisation

EU schemes aid the cost of adopting sustainable catching methods or facilities to maximise the quality of fish on board vessels. In some areas of the UK, this measure also covers crew comfort and working conditions. Grants are not available for increased fishing effort and/or an increase in fishing capacity.

Structural adjustment

The EU's Financial Instrument for Fisheries Guidance (FIFG) maintains CFP funding for structural measures covering the industry as a whole. In April 2001, the Fisheries and Aquaculture Structures (Grants) Regulations 2001 were introduced, providing for national back-up aid in England to enable the industry to obtain funding for measures set out in the UK's Sectoral Plan. This indicated that aid would be available for vessel modernisation (for quality improvements and more selective fishing methods only), safety training for fishermen, decommissioning, protection and development of aquatic resources, improvement of fishing port facilities, processing and marketing of fishery and aquaculture products, product promotion, and other projects for the collective benefit of the fishing industry. The regulations provide for the implementation of the UK's programme for implementing FIFG, which was adopted by the Commission on 27 December 2000. Similar regulations were introduced in Scotland, Wales and Northern Ireland.

Assistance for aquaculture

Government funding for aquaculture R&D through Defra was around GBP 1.9 million in 2001. SEERAD R&D funding for 2001 was GBP 1 million. In addition, there was ongoing funding of a 5 year, GBP 10 million Aquaculture LINK programme for collaborative research between government and Industry on fish and shellfish farming.

Markets and trade

Domestic market

The National Statistics publication, *Family Food in 2004-05*, showed that UK household purchases of fish increased from 156 g per person per week in (2003-04) to 158 g per person per week in 2004/05, an increase of 1.3%. Expenditure has increased by over 5% from GBP 0.94 per person per week in 2003/04 to GBP 0.99 in 2004/05. Twenty three per cent of this expenditure was on ready meals, 16% on white fish and 14% on takeaway fish.

Under EU support arrangements, if a member of a Producer Organisation (PO) puts fish up for sale for human consumption but cannot find a buyer at or above the pre-set withdrawal price, the fish must be permanently withdrawn from the human consumption market and a claim for aid made by the PO. The Rural Payments Agency reported that from April 2005 to the end of March 2006, payments were made for UK withdrawal claims to a value of GBP 253 000 compared to GBP 573 000 in the same period in the previous year. There was therefore a 56% reduction in withdrawal payments in 2005 compared to the previous year. Ninety eight per cent of the withdrawal claims were for catches of cod, herring, mackerel, hake or haddock.

Trade

Between 1994 and 2005, total imports of fish and fish preparations have increased from 458 000 mt to around 717 000 mt (an increase of approximately 57%). In value terms, total imports rose in 2005 to GBP 1 686 million, a 14% increase on 2004. In 2005, total exports of fish and fish preparations amounted to 458 000 mt product weight, a decrease of 4.2% on 2004. In terms of value, total exports increased by 4.4% in 2005 to GBP 925 million.

Sanitary regulations

EC legislation is transposed into UK legislation that sets minimum standards for the production and marketing of fish and shellfish. These shellfish regulations require that live bivalve molluscs other than wild Pectinidae, are harvested from waters classified according to their microbiological quality. This determines when they can be placed on the market for human consumption. Harvesting areas are also monitored for the presence of marine biotoxins and chemical contaminants. It is expected that fishery products meet the microbiological criteria set down in Commission Decision 93/51/EEC for the production of cooked crustaceans and molluscan shellfish. This acts to provide the microbiological benchmark to ensure the safety of public health in relation to the production of fishery products.

Labelling

Since 1 January 2002, new EU provisions require that certain fish and fish products must, when offered for retail sale to the final consumer, be labelled with the commercial name of the species, method of production and the catch area. Regulation also includes traceability provisions, labelling information, as well as the scientific name of the species and information to this effect is available at all stages of the marketing chain. The Regulations are directly applicable in the UK and the enforcement provisions have been made in Fish Labelling Regulations for the UK.

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