Fishing

Scottish Government
Riaghaltas na h-Alba
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Key message

From 2014-2018 the tonnage landed has decreased by 7%, though the value of the catch has increased by 18%. New management measures have been implemented, including: the landing obligation, establishing non-statutory Regional Inshore Fisheries Groups (2016) and Marine Protected Area (MPA) protection. A Future Fisheries Management Strategy is due in 2020.

Fishing vessel Lunar Bow hauling the net.
Photo by John Dunn, Marine Scotland.

What, why and where?

Fishing within the Scottish part of the UK Exclusive Economic Zone (EEZ) is managed under the terms of the EU Common Fisheries Policy (CFP) although there are additional agreements for migratory stocks. Fishing can provide a sustainable source of nutritious, healthy food and its exploitation sustains many of Scotland's most fragile rural coastal communities.

Fishing in Scottish waters is prosecuted by vessels from Scotland, other UK countries, EU member states, as well as other Coastal States e.g. Norway and Faroes. The vessels are often categorised into: **the offshore fleet** - those fishing for demersal (fin fish like haddock and cod, that are on or near the sea bed) and pelagic (fin fish like mackerel and herring, that are away from the sea bed and the shore) species, and **the inshore fleet** - those fishing for mainly for *Nephrops* (also known as Norway lobster, Dublin Bay prawn, langoustine or scampi) and shellfish.

All landings are reported based on sea area of capture and port of landing. Fish from Scottish waters can be landed at any UK or EU port. Statistics on landings are included in the annual Scottish Sea Fisheries Statistics (Scottish Government, 2019), although that excludes landings by non-UK vessels outside of the UK. In this assessment we are focussing on fish that are caught in Scottish waters regardless of whether they were caught by Scottish vessels or landed into Scotland. Figures from 2016 - 2018 show the tonnage of fish landed (fished within Scottish seas) has been relatively stable at around 490 thousand tonnes (Figure 1). This is larger than the 349 thousand tonnes landed in Scotland in 2018 (Figure 2).

There is a wealth of measures in place to manage fisheries. These include temporary closure of areas where juvenile fish are present in abundance, discard bans and technical restrictions on fishing gear and even complete fishing prohibitions for biologically sensitive areas (see Marine Protected Areas assessment).

For further information on this topic go to: https://marine.gov.scot/sma/assessment/fishing

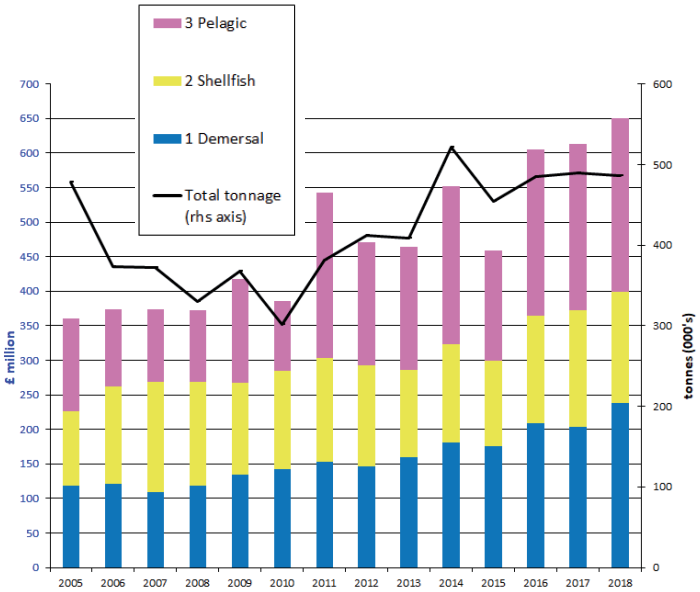


Figure 1:
Landing value (cash prices) and tonnage of fish caught in all sea regions adjacent to Scotland by all UK vessels and by foreign vessels into the UK, 2005 to 2018.

Source: Marine Scotland, Scottish Sea Fisheries Statistics. Includes landings by all UK vessels and landings by foreign vessels into the UK. Excludes fish caught in Scottish sea areas by non-UK vessels and landed outside the UK.

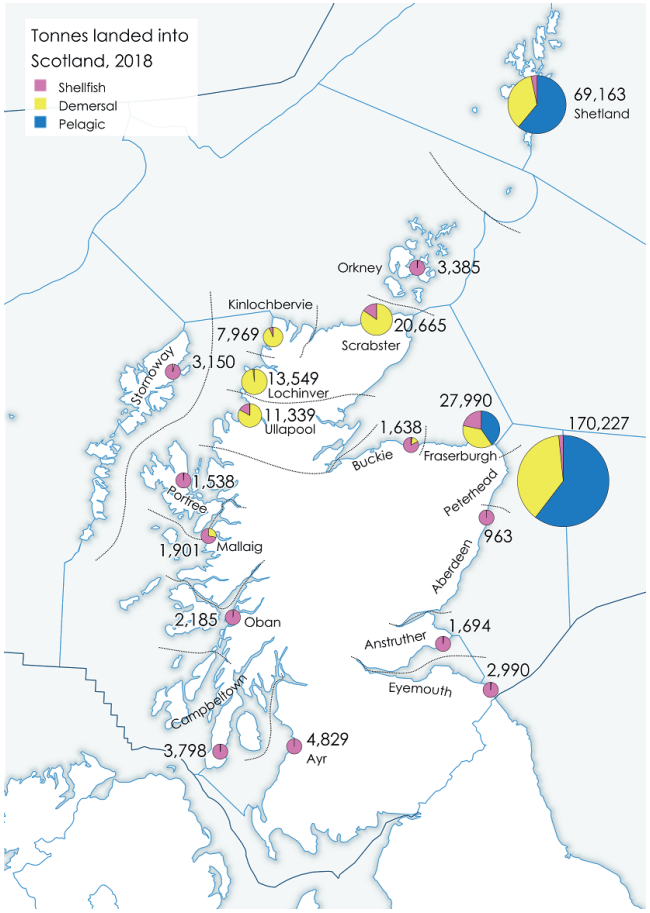


Figure 2:
Tonnage landed into Scotland by all vessels by sea fishery district (black lines) and species type, 2018. Scottish Sea Areas (blue lines) added for context.

Source: Marine Scotland, Scottish Sea Fisheries Statistics (Scottish Government, 2019 a). Landings in this map includes fish caught outside Scottish waters.

Figure 3:
Shetland-registered demersal trawler towing in the North Sea. Photo by Stuart Bell, Marine Scotland.

Contribution to the economy

Seafood is Scotland's second largest export, reported through HMRC Regional Trade Statistics and Overseas Trade Statistics as being worth approximately £1 billion in 2017 (Scottish Government, 2018).

Figures from Scotland's Marine Economic Statistics (Scottish Government, 2019b) show that in 2017 the fishing sector contributed £316 million Gross Value Added (GVA) (accounting for 0.24% of the overall Scottish economy, and 6 per cent of the marine economy) and provided employment for a headcount of 4,800 people, (0.19% of total Scottish employment, and 6% of the marine economy employment).

From 2016 to 2017 the GVA from fishing (adjusted to 2017 prices) increased by 1%, while the longer term trend from 2008 to 2017 showed that fishing GVA increased by 72%. Over the same period, employment fell by 12%, though it has been stable in recent years.

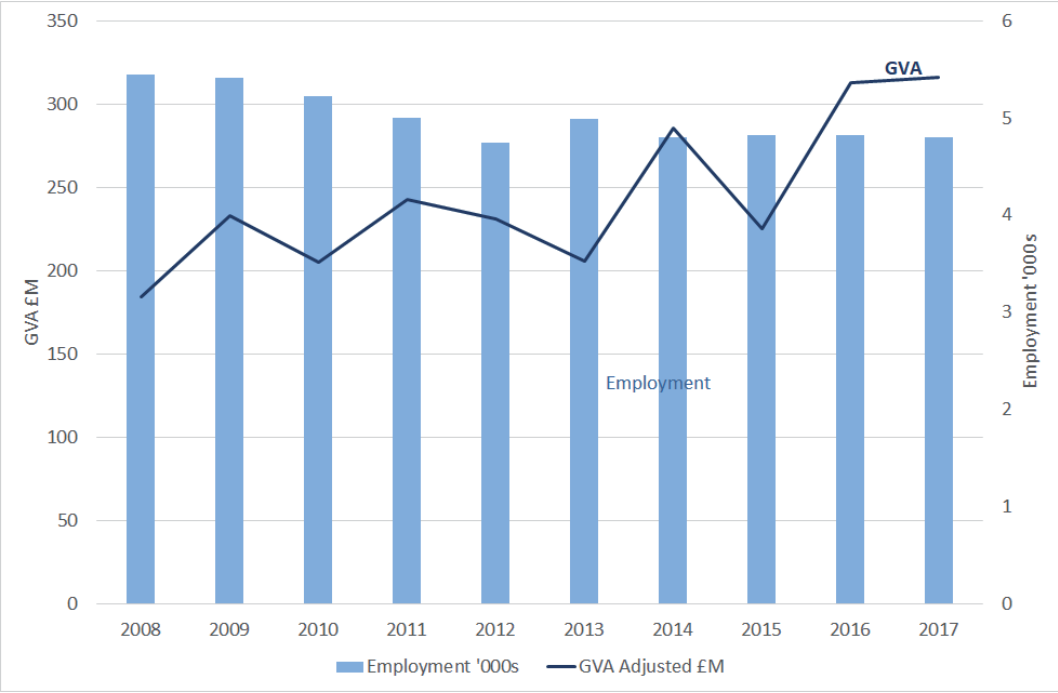


Figure 4:
Fishing - GVA and employment, Scotland, 2008 to 2017 (2017 prices).
Source: Scotland's Marine Economic Statistics. Scottish Government (2019b).

Examples of socio-economic effects

- Long and significant fishing history.
- Important for remote coastal communities.
- Resource is high quality, nutritious and potentially sustainable source of protein important for food security.
- Component of international trade.

Pressures on the environment

An OSPAR agreed list of marine pressures is used to help assessments of human activities in the marine environment. The marine pressure list has been adapted for use in Scotland via work on the Feature Activity Sensitivity Tool (FeAST). Fishing activities, through 16 FeAST activity types, can be associated with 15 marine pressures – please read the pressure descriptions and benchmarks for further detail.

Forward look

Scotland's fisheries operate within a strategic international and domestic framework designed to deliver responsible and sustainable fisheries management.

To secure the long term future of the Scottish fisheries sector, marine biodiversity needs to be considered in multiple ways. For example, commercially important fish and shellfish stocks must be harvested within sustainable limits. Also non-target species populations and the

wider marine food web must not be adversely affected by fishing activity. Habitats too must be protected to support the lifecycle of all species and help maintain healthy populations. The approach to managing Scotland's fisheries sustainability will be contained within the Future Fisheries Management Strategy due to be published in 2020.

Management measures, such as a workable catching policy, are required to reduce bycatch and discards, and to ensure stocks remain productive and sustainable. Such measures will be supported by modernised, risk-based monitoring such as Remote Electronic Monitoring.

Scotland is investing in the modernisation of the inshore fishing fleet and will extend appropriate and proportionate remote electronic monitoring technology to the entire commercial fleet. This will begin with the scallop dredge sector in 2020 and extend to encompass all commercial fishing vessels of under 12 metres length. Increasing use of Remote Electronic Monitoring will foster confidence and accountability in commercial fishing.

Status and trend assessment

Trends in value of catch from Scottish Sea Areas, including the international waters in the Hatton sea region. Change from 2014 to 2018 (2018 prices). Includes landings by all UK vessels (of all lengths) and landings by foreign vessels into the UK. Excludes fish caught in Scottish sea areas by non-UK vessels and landed outside the UK.

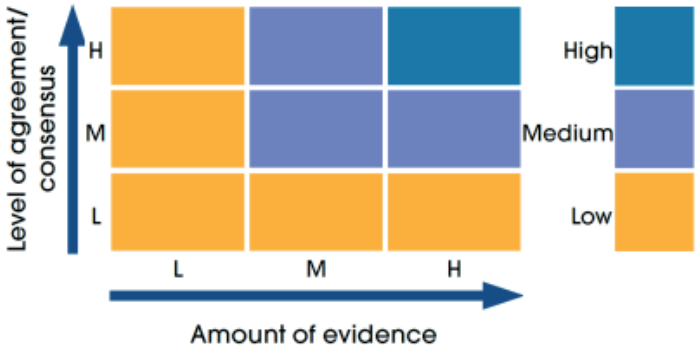
Scottish sea area	Trend
Bailey	
Clyde	
East Scotland Coast	
East Shetland	
Faroe Shetland Channel	
Fladen	
Forth	
Forties	

Scottish sea area	Trend
Hatton	
Hebrides	
Minches and Malin Sea	
Moray Firth	
North Scotland Coast	
Rockall	
Solway Firth and North Channel	
West Shetland	
National level	

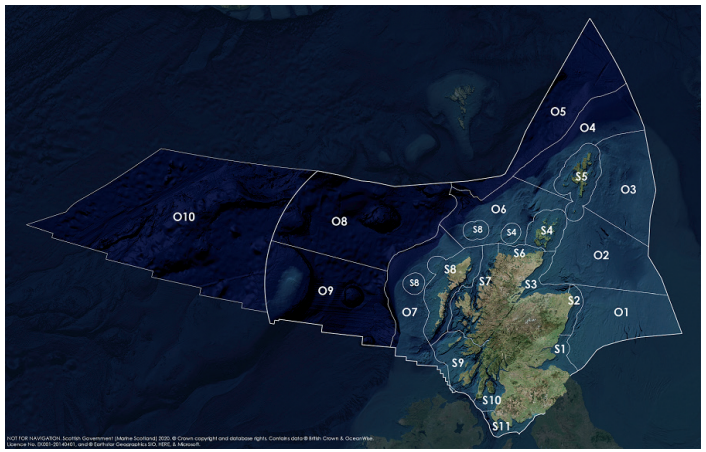
Status and trend assessment legend

Status assessment (for Clean and safe, Healthy and biologically diverse assessments)		**Trend assessment (for Clean and safe, Healthy and biologically diverse and Productive assessments)**	
	Many concerns		No / little change
	Some concerns		Increasing
	Few or no concerns		Decreasing
	Few or no concerns, but some local concerns		No trend discernible
	Few or no concerns, but many local concerns		All trends
	Some concerns, but many local concerns	**Confidence assessment**	
	Lack of evidence / robust assessment criteria	**Symbol**	**Confidence rating**
	Lack of regional evidence / robust assessment criteria, but no or few concerns for some local areas		Low
	Lack of regional evidence / robust assessment criteria, but some concerns for some local areas		Medium
	Lack of regional evidence / robust assessment criteria, but many concerns for some local areas		High

Overal confidence

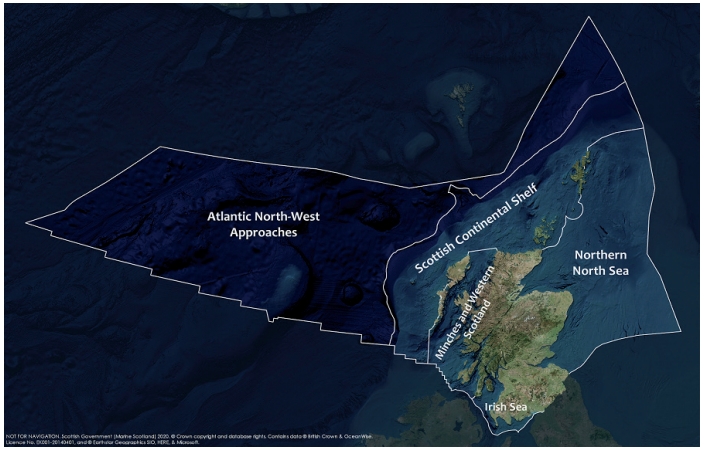


Assessment regions

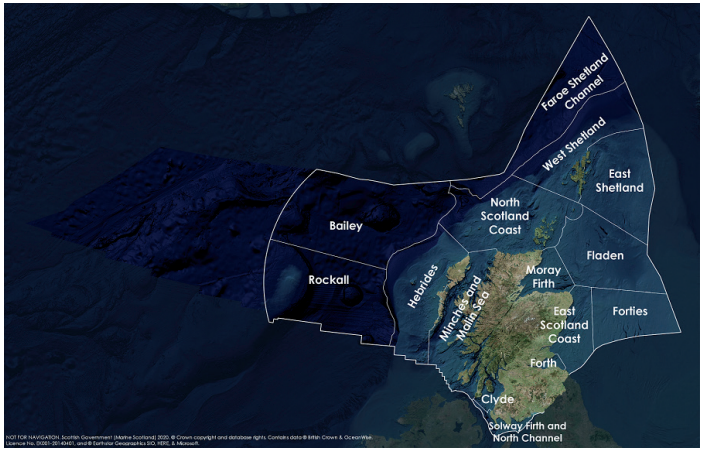


The Scottish Marine Regions (SMRs; S1 – S11) and the Scottish Offshore Marine Regions (OMRs, O1 – O10)

Key: S1, Forth and Tay; S2, North East; S3, Moray Firth; S4 Orkney Islands, S5, Shetland Isles; S6, North Coast; S7, West Highlands; S8, Outer Hebrides; S9, Argyll; S10, Clyde; S11, Solway; O1, Long Forties, O2, Fladen and Moray Firth Offshore; O3, East Shetland Shelf; O4, North and West Shetland Shelf; O5, Faroe-Shetland Channel; O6, North Scotland Shelf; O7, Hebrides Shelf; O8, Bailey; O9, Rockall; O10, Hatton.



Biogeographic, Charting Progress 2 (CP2) Regions. These have been used as the assessment areas for hazardous substances.



Scottish Sea Areas as used in Scotland's Marine Atlas 2011. These are sub divisions of the biogeographic, or Charting Progress 2 (CP2), Regions.

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NatureScot
Scotland's Nature Agency
Buidheann Nàdair na h-Alba

JNCC
Joint Nature Conservation Committee

SEPA
Scottish Environment Protection Agency

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