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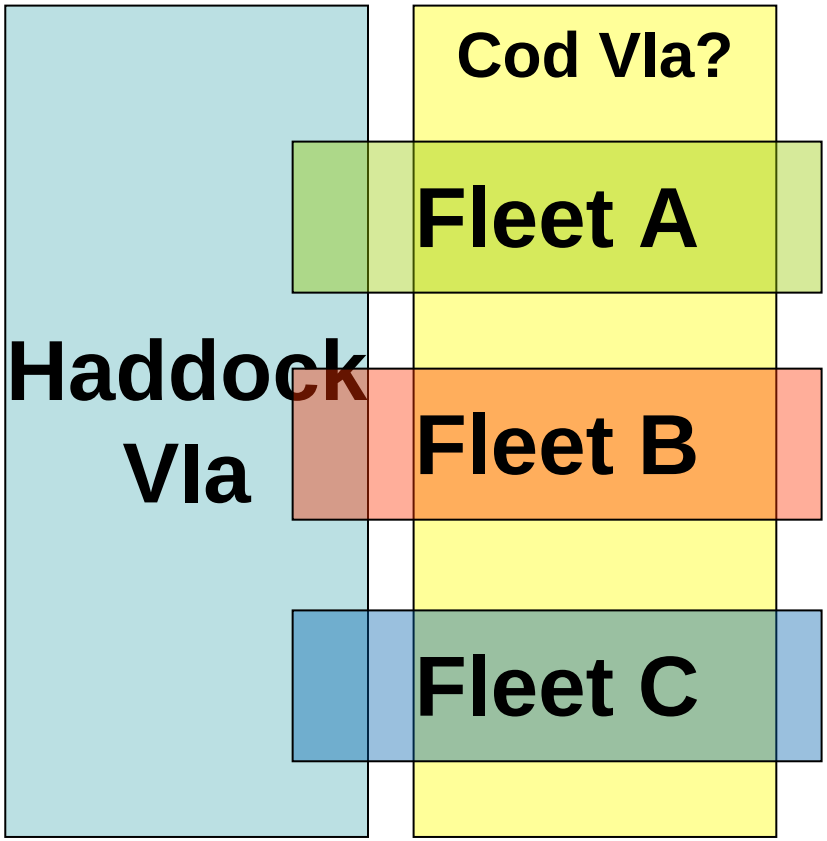
UK vessels catching West of Scotland Haddock – some characteristics

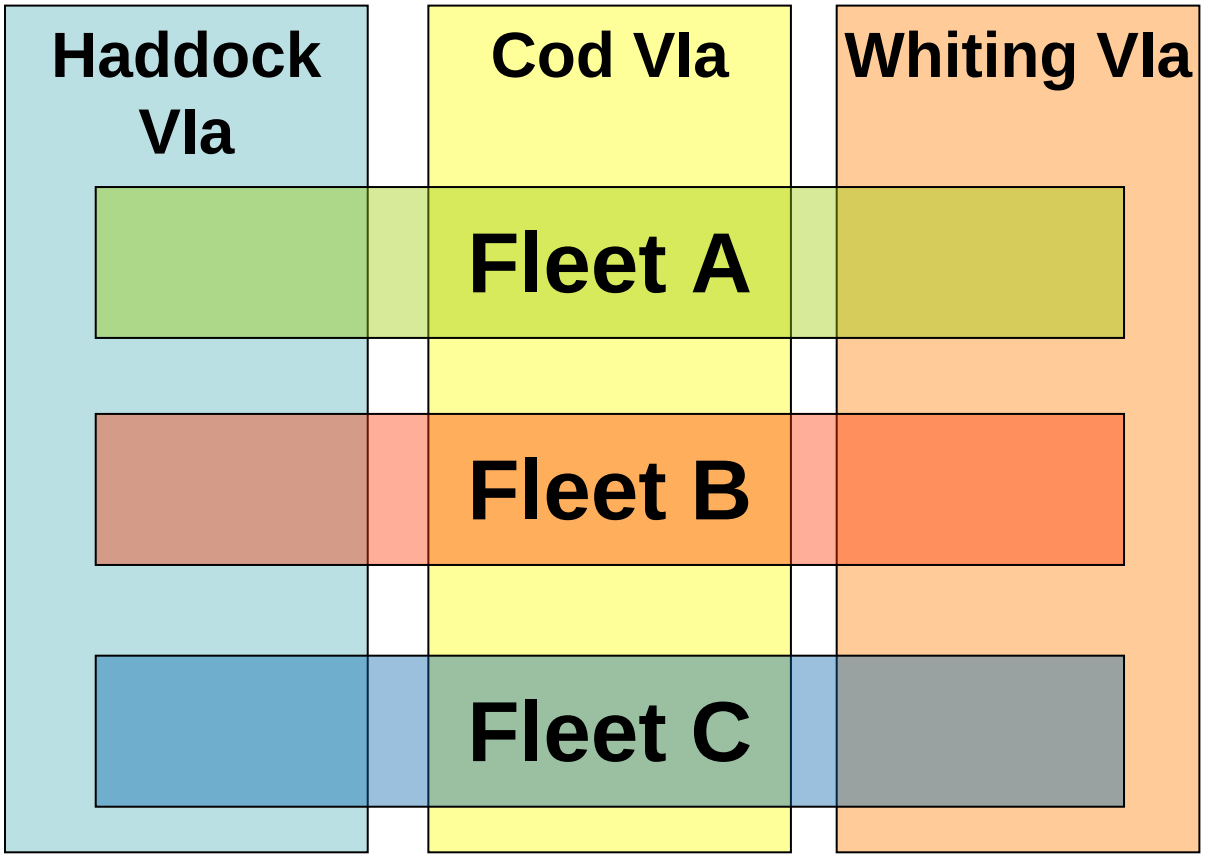
Presentation to the North Western Waters RAC
Sébastien Metz
Aberdeen, 3 July 2009

Current evaluation process



- Stock evaluated one by one
  - Doesn't take into account other fishing opportunities
- Assumption: if catch < quota, then quota was too high
  - Sometimes it's true (horse trading)
  - But sometimes there is an other factor: fuel price too high, price of fish too low…

A better (and more complicated) approach could be…



Importance of Haddock VIa for the UK fleet

Source: data from MFA

	UK landings		Number of UK vessels		
	Quantity	Value	Landing haddock VIa	Landing >1 tonne	Value of haddock VIa >3% annual value
2002	6,235 t	£5,044K	368	223 (61%)	90 (24%)
2003	4,733 t	£3,611K	403	216 (59%)	70 (19%)
2004	3,005 t	£2,433K	323	163 (44%)	52 (14%)
2005	2,791 t	£2,523K	222	96 (26%)	29 (8%)
2006	4,946 t	£5,901K	201	81 (22%)	32 (9%)
2007	2,780 t	£3,515K	207	77 (21%)	26 (7%)
2008	1,777 t	£2,054K	197	73 (20%)	20 (5%)

Importance of Haddock VIa for the UK fleet
Share in volume landed in 2008

Source: data from MFA

	<1.5%	**1.5% <3%**	**3% <5%**	**5% <10%**	**10% <20%**	**>20%**	**Total**
Whitefish vessels	32	7	7	11	4	2	**63**
Nephrops vessels	104	9	7	3			**123**
Others	7						**7**
Total	**143**	**16**	**14**	**14**	**4**	**2**	**193**
Share in landings	6%	9%	9%	35%	30%	11%	

34 boats land 85% of the UK contribution

Importance of Haddock VIa for the UK fleet
Share in value landed in 2008

Source: data from MFA

	<1.5%	**1.5% <3%**	**3% <5%**	**5% <10%**	**10% <20%**	**>20%**	**Total**
Whitefish vessels	39	7	4	9	3	1	**63**
Nephrops vessels	117	3	1	2			**123**
Others	6	1					**7**
Total	**162**	**11**	**5**	**11**	**3**	**1**	**193**

Share in value	9%	11%	10%	47%	18%	5%

20 boats generate 80% of the UK contribution

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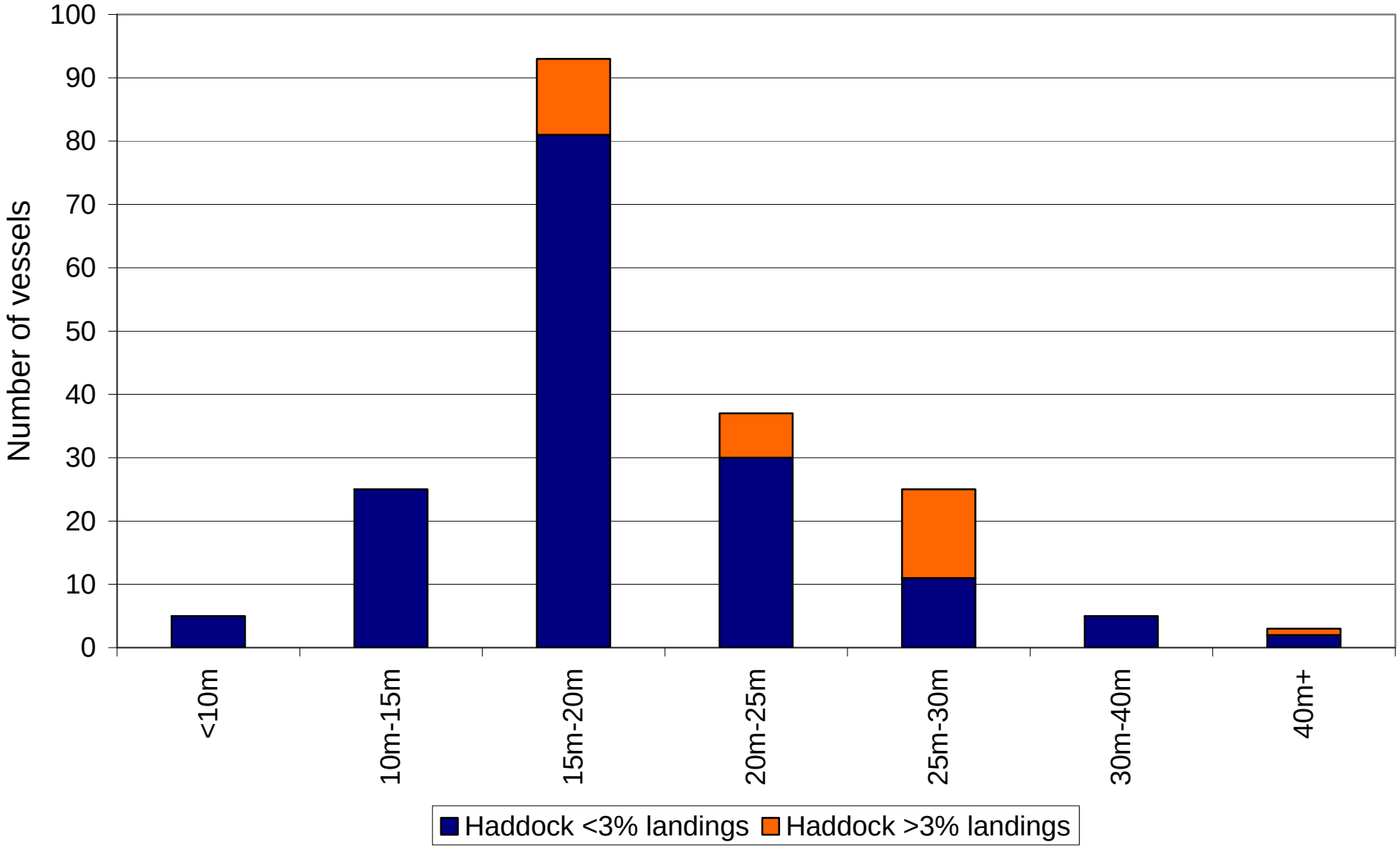
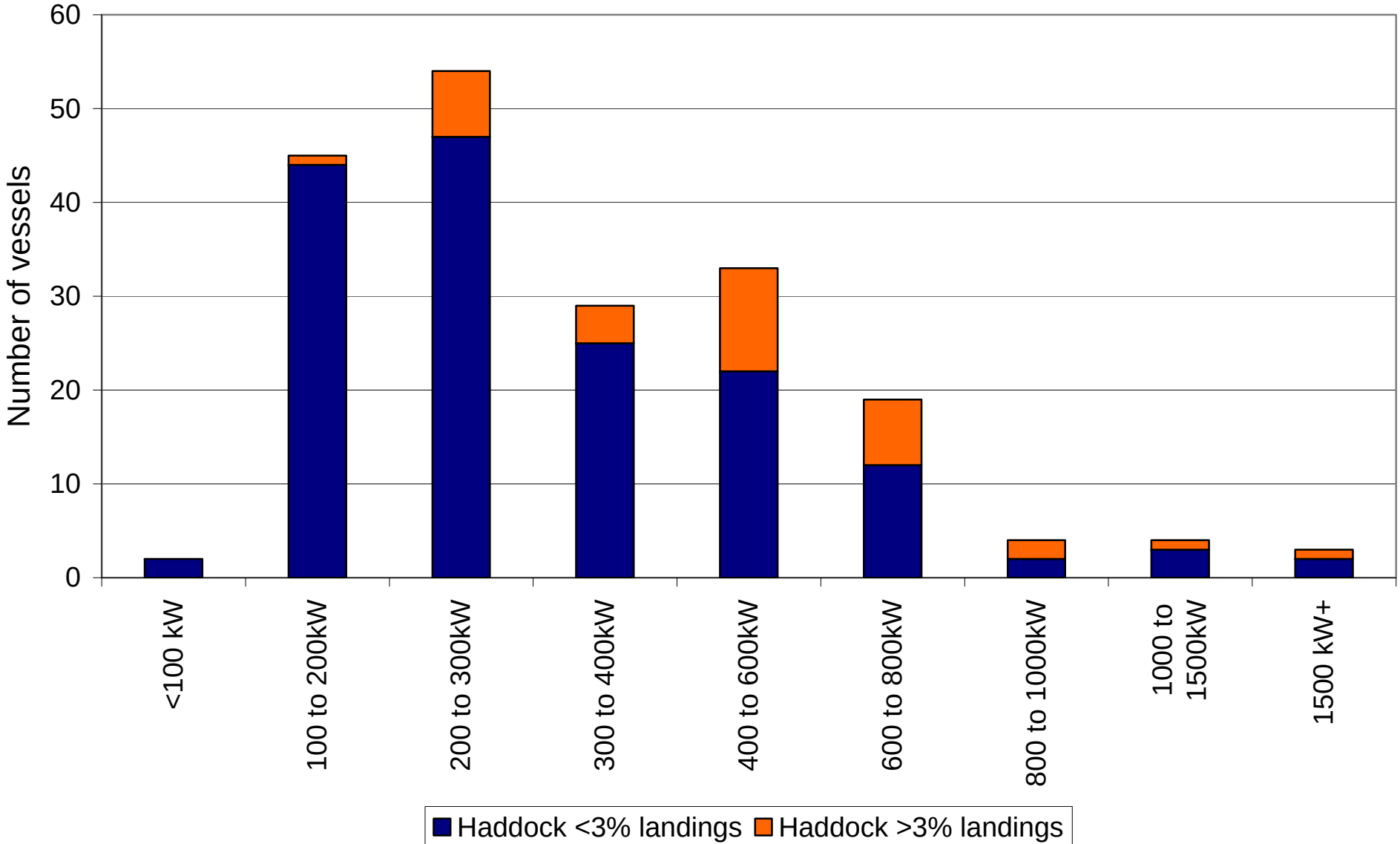
UK Vessels catching Haddock – by length

Source: data from MFA, 2008



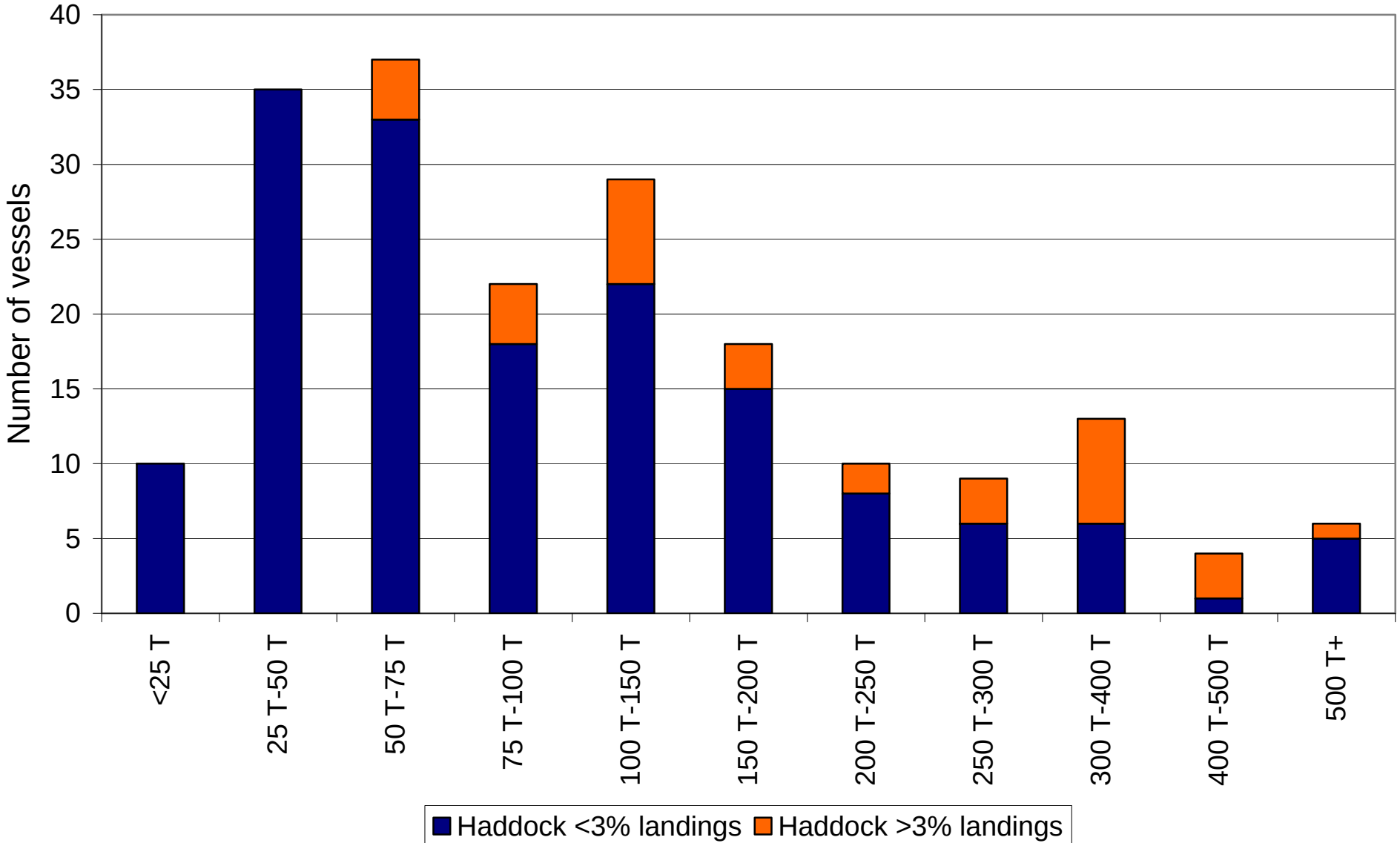
UK Vessels catching Haddock – by power

Source: data from MFA, 2008

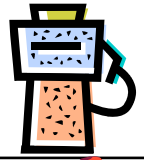
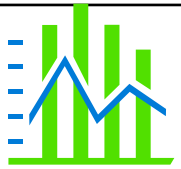


UK Vessels catching Haddock – by tonnage

Source: data from MFA, 2008



Vessel performance
NSWOS Demersal trawl single rig >24m

Average per boat for:	Segment average
 Fishing income	£1,274K
 Fuel & Oil	£310K
 Crew share	£284K
 Operating Profit	£100K
 Net Profit	£21K
 Days at Sea	244

Source:
Seafish survey, 2007
Provisional figures
To be published

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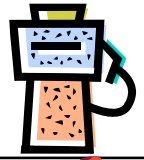
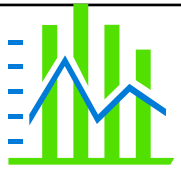
Vessel performance
NSWOS Demersal seine

Average per boat for:	Segment average
 Fishing income	£543K
 Fuel & Oil	£62K
 Crew share	£168K
 Operating Profit	£50K
 Net Profit	£26K
 Days at Sea	149

Source:
Seafish survey, 2007
Provisional figures
To be published

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Input – Output study: impacts of removing the sea fishing and fish processing sectors

- £1m additional landings generate
  - 82 FTEs
  - £2.3m in GDP
- Removing the current fishery would then cause the loss of:
  - 160 FTEs
  - £4.6m in GDP

  (assumption: landings of Haddock VIa worth £2m)

Source: SEAFISH, “The economic impacts of the UK sea fishing and fish processing sectors: an input-output analysis”

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