THE UNITED KINGDOM NATIONAL STRATEGIC PLAN FOR THE EUROPEAN FISHERIES FUND (2007 – 2013)

Prepared in conformance of Article 15
of Council Regulation (EC) No 1198/2006

EUROPEAN FISHERIES FUND
UK NATIONAL STRATEGIC PLAN FOR FISHERIES

INTRODUCTION

1. Managing fisheries is a devolved responsibility within the UK, and the administration of UK fisheries is carried out by the UK Government and Devolved Administrations.[1] This National Strategic Plan draws together the strategic priorities of the UK for implementing the Common Fisheries Policy, in preparation for developing priorities for the European Fisheries Fund (EFF).

2. The original Plan was adopted by the UK Government and Devolved Administrations, following consultation with partners, with its official submission on 23 January 2008. This new version of the Plan incorporates some adjustments arising out of subsequent dialogue with the Commission and reflecting subsequent developments.

3. In accordance with the Regulation on the European Fisheries Fund, this document uses the term "fishing" to mean commercial fishing from vessels[2]. Therefore, in terms of the catching sector, the document focuses on commercial fishing. However, we recognise the importance of other forms of fishing such as recreational sea angling, which also make a contribution to local economies in some parts of the UK.

SECTION 1: GENERAL DESCRIPTION OF THE SECTOR

4. The UK has an important fisheries industry[3] which makes a **contribution to both national and regional economies**, providing employment, especially in a number of rural communities. Whilst those working in catching, processing and aquaculture account for a small percentage of the national workforce (0.7% in Scotland, 0.1% in England and Wales), they make a significant contribution to local economies as they tend to be regionally and locally concentrated[4]. In 2007, the value of fish landed by UK-registered vessels into the UK and abroad was €942.6m. Turnover in the UK processing sector was €3.30 billion[5] in the UK aquaculture sector

[1] Departments in the Isle of Man, Jersey and Guernsey are responsible for administering fishing activity in their respective areas.
[2] Article 3, recital b) of the Regulation on the European Fisheries Fund states that ""fisher" means any person engaging in professional fishing on board an operational fishing vessel, as recognised by the Member State."
[3] Includes catching, aquaculture and processing sectors
[4] These figures do not reveal the importance of the fisheries sectors to some local areas. For example, there are several areas in Scotland where fisheries employment accounts for over 10% of direct employment.
[5] 2006 figure

€744m[6] The catching sector employs nearly 13,000[7] people, processing over 17,000 and aquaculture more than 3,000[8]. The declared inland fishery catch[9] for England and Wales in 2005 was 138.1 tonnes.

5. The fisheries industry has long-established **links with broader maritime activity**. The catching sector supports allied industries such as boatbuilding and marine equipment supply. It also relies on maritime services such as provision of port and harbour facilities, radar, shipping forecasts, and maintenance of coastal waterways and navigation marks. In some instances, a thriving catching sector helps make ports viable for other commercial and leisure users. In some parts of the UK, the recreational angling sector also supports boat builders, charter boat skippers and crew, tackle manufacturers and angling equipment suppliers.

6. **Regions** with a strong reliance on the employment and income generated by fisheries-related activities are, in particular, the North East and West of Scotland, Shetland, and South-West England. The fisheries industry is a critical employer in some rural areas with few employment alternatives, particularly in Scotland where it provides up to 23 percent of the jobs in some areas. It also contributes to the tourist economy, particularly in South-West England, a region which has built a strong reputation for its fish cuisine. Around the coast, fisheries activity makes an important contribution to the local social fabric and culture.

7. **Fishing fleets** in the UK are diverse and have an interest in over 100 EU quota stocks and in a wide range of non-quota species. As at 31st December 2007, the UK catching sector had 6,775 fishing vessels, of which the over 10 m vessels accounted for 23% by number, 91% by gross tonnage and 67% of total engine power. 48% of the UK's over 10 m-fleet and pelagic vessels are based in Scotland. Nearly half of all UK employment in the catching sector is in the under-10 m boat sector, much of which is based in England and Wales. The UK fleet has adapted to changing fish stocks and quota levels; since 1997 the number of boats has decreased by 18%, gross tonnage by 20% and engine power by 16%.

8. Annual **landings** of sea fish by UK-registered vessels into the UK and abroad have been at around 600,000 to 700,000 tonnes for the last five years. In 2007, 610,400 tonnes of fish were landed with a total value of €942.6m[10] Landings by Scottish vessels in 2007 accounted for 61% by quantity and 595 by value of total landings by UK vessels. Catches of

[6] 2006 figure
[7] Relates to annual census of fishermen employed in the capture industry carried out by Fisheries Administrations.
[8] Employment in Processing and aquaculture sectors is based on results from the Annual Business Inquiry carried out by the UK Office for National Statistics
[9] Rod, net and fixed engine.
[10] Demersal species (mainly cod, haddock, sole and plaice) represented 34% of total landings by quantity and 37% by value. Pelagic species (mainly herring and mackerel) accounted for 43% of landings by quantity but only 20% by value while shellfish accounted for 24% of landings by quantity and 43% by value.

Nephrops, crabs, lobsters and other shellfish have increased to supply a rising demand, particularly from export markets, whilst whitefish landings are contracting in line with declining stocks. In 2007, UK vessels landed 169,000 tonnes of sea fish with a value of €158m[11] into non-UK ports.

9. Good **science** makes an important contribution to fisheries management. In 2006 the Fisheries Departments' science budgets amounted to approximately €30.8 m1 million. Of this, €9.54m was for research projects commissioned at the UK's two fisheries laboratories, the Centre for Environment, Fisheries and Aquaculture Science (CEFAS) in England, and Fisheries Research Services (FRS) in Scotland, and other research institutes including universities. The remainder, approximately €19.07m, was for stock monitoring and surveys undertaken by CEFAS and FRS. Further surveys are undertaken in partnership with the catching sector, including the Defra Fisheries Science Partnership which has an annual budget of €1.46m.

10. The UK **aquaculture** sector is an important employer in rural communities, particularly in Scotland, which is the EU's leading producer of farmed salmon. In 2006 there were 431 fish and shellfish farming enterprises in the UK, directly employing almost 3000 people[12]. The main finfish species farmed are salmon (132,000 tonnes produced in 2006, mainly in Scotland) and rainbow trout (13,000 tonnes produced in 2006). There is also limited production of other species, such as carp, brown trout, turbot, halibut, cod and Arctic char. UK farmed shellfish production in 2006 was 25,574 tonnes. Mussels were the major species produced (mainly in Wales and Northern Ireland), with oysters, scallops and clams also being farmed. Scallop farming also has been successful for many years and trials on scallop hatchery work have also proved to be successful. This sector also supports an infrastructure of transporters, processors, boat builders and other suppliers.

11. The UK Administrations invest around €5.35 m p.a. on aquaculture research, particularly on fish health. In addition, Administrations, the aquaculture sector and other organisations[13] invest approximately €3.785 m p.a. in sponsoring collaborative applied and fundamental research to promote the sustainable development of the aquaculture sector, by minimising environmental impacts and the maintenance of high fish health status of farmed and wild fish stocks[14].

12. The UK has a substantial onshore **processing** sector consisting of 388 enterprises in 2006 businesses that employ 17,000 people. Processors

[11] Demersal species (mainly cod and plaice) represented 20% of total landings abroad by quantity and 46% by value. Pelagic species (mainly herring, mackerel and blue whiting) accounted for 76% of landings by quantity and 46% by value while shellfish accounted for 4% of landings by quantity and 9% by value.
[12] Full-time, part-time and casual staff
[13] Through groups such as the Scottish Aquaculture Research Forum (SARF), Seafish, The Crown Estate and the Biotechnology and Biological Sciences Research Council
[14] Total estimated annual expenditure on UK aquaculture related R&D calculated from the UK Aquaculture R&D database.

are supplied by both the catching and aquaculture industries. The UK still has a large number of small to medium sized processors, although consolidation has taken place in recent years and is likely to continue as smaller processors face cost and supply-chain pressures.

13. Consumer-level **marketing** of fish products is undertaken by a number of food manufacturing companies. Aquaculture industry associations[15] also conduct extensive marketing programmes for farmed aquatic produce. In addition, Seafish (the Sea Fish Industry Authority), a Non Departmental Public Body funded mainly by industry through a levy, supports industry marketing objectives across all parts of the non-salmonid UK fish supply chain[16]. A large proportion of UK landed catch is sold through auction markets, although significant amounts go direct to retailers or processors. UK consumer expenditure on fish products as a proportion of the food wallet has remained steady at around 4% over the last ten years.

14. The UK's **trade** in fish and fish products has increased steadily over the past ten years by volume and value[17]. The UK now exports up to 50% of its catch by value[18]. In 2006, the UK exported fish and fish products to the value of €1385m. Imports now account for 70% (by value) of fish consumed in and exported by the UK; some €2.82 billion of fish in 2006[19].

15. Whilst niche markets exist for some high quality products, including certain aquaculture products such as organic cod, the mass-market **supply** of fish to UK consumers is coalescing around the large supermarket retailers. In 2004, supermarkets were responsible for 88% of retail sales by volume and value of fish and fish products (excluding canned produce). However, the UK also has approximately 1,300 independent fishmongers. 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.

16. Whilst this plan addresses only commercial industries in accordance with the EFF Regulation, recreational sea angling is also a significant contributor to some coastal areas: in England and Wales, direct spending by recreational sea anglers amounts to about €793 m per year[20] and it is estimated that the activity supports about 19,000 jobs in England and Wales. The Scottish Sea Angling Conservation Network has estimated that more than €221 m is spent annually on sea angling in Scotland. A study has been commissioned to look into the economic value of sea

[15] Such as the Shellfish Association of Great Britain, Association of Scottish Shellfish Growers, Scottish Salmon, British Marine Finfish Association and Shetland Aquaculture.
[16] Seafish carries out research and other projects aimed at raising standards, improving efficiency and ensuring that the UK industry develops in a viable way. It also carries out work on training, research and development of standards.
[17] Between 1997 and 2006, imports of fish and fish products increased by 50% in volume and 84% in value. Over the same period exports increased by 39% in volume and 58% in value.
[18] Most if this consists of high value shellfish exports to the EU, exports of other minor species to the EU and low price pelagic fish destined for countries outside the EU.
[19] Key importing nations are Norway, Iceland, Faeroes, New Zealand, Australia and Canada, as well as other fleets inside the EU.
[20] Drew Associates, July 2004.

angling in Scotland. In addition, the report *The Economic Impact of Game and Coarse Angling in Scotland*, published by the Scottish Executive in 2004 estimated that annual angler spend amounted to nearly €166.6 m.

17. An overview of the fisheries industry in England, Scotland, Wales and Northern Ireland, together with statistical information, is provided in an Annex to this section.

SECTION 2: SWOT ANALYSIS (STRENGTH, WEAKNESSES, OPPORTUNITIES, THREATS)

The industry

18. The UK, which mainly competes with developed countries such as Iceland, Spain, Norway, Denmark, Ireland and France for supply of fish, is seeing increasing demand for fish and fish products[21]. Total UK consumer purchases of fish were estimated to be €3.2 billion in retail in 2003 and €3.75 billion in foodservice[22].

19. Until recently, the most pressing problems for the fish catching sector were largely limited to the whitefish sector (cod, haddock, plaice, sole, etc) which has low levels of profitability. This is because fishing activity has been restricted in the sector to safeguard or restore some of the stocks in these mixed fisheries (notably cod). These low levels of profitability are leading to difficulties with retention and recruitment of skilled crews. Other fishing stocks such as mackerel, herring and shellfish have generally been under less pressure and have generated good profits for fishermen.

20. However, recent very steep increases in fuel prices have now created a general pressure on catching sector profits. This situation is being urgently addressed at both EU and national level.

21. The aquaculture sector is for the most part healthy and technological advances are leading to improving productivity. There are strong brand identities in established products such as Scottish salmon, which has Protected Geographic Identity (PGI), and the sector is beginning to diversify into other species where there are significant opportunities. Whilst in some instances Fisheries Administrations offer assistance for the exploitation of these opportunities, developments need to be considered within planning and environmental constraints. The Strategic Framework for Scottish Aquaculture, which was launched in 2003, is intended to address these issues with a view to stimulating sustainable growth in the aquaculture sector. This is currently being updated to reflect developments over recent years. In addition, the European Commission has begun an exercise to revisit its Strategy for Aquaculture, with a view to promoting growth in this sector.

22. UK processors face cost and supply-chain pressures. There are significant opportunities for processors associated with the increase in demand for fish products, which is partly driven by their acknowledged health benefits. Growth, particularly in the chilled and pre-packed markets, is expected to continue. There are also opportunities for the development of niche markets and promotion of higher quality fish both

[21] Average per capita consumption in the home increased by 14% in volume and 46% in value between 1997 and 2006; UK exports of fish and fish products have increased by 39% in quantity terms and 58% in value terms between 1997 and 2006.
[22] Provision of food out of home.

nationally and worldwide, particularly sustainably sourced products. Opportunities exist to develop new relationships in new markets or to develop further existing markets with carefully targeted campaigns which highlight quality or provenance aspects of the product.

23. The catching sector as a whole is critical of the regulatory burdens placed on it and the impacts on efficiency and profitability. A priority for the UK is to reduce the regulatory burdens on the catching sector, whilst ensuring that the sector contributes to environmental and long-term sustainability goals.

24. UK and EU fisheries management have as yet been unable to ensure sustainable long-term management of many stocks. Problems with UK and EU management stem from the interaction of the whole system and not from a single problem either at the EU or UK level. Levels of compliance vary across the EU. Low levels of compliance are often driven by economic and institutional factors and cannot simply be solved by increasing enforcement activity, though this is a critical component. The introduction of the Registration of Buyers and Sellers of first sale fish in the UK has improved our ability to account for landings of fish and significantly reduced the levels of undeclared landings. We expect this to lead to improvements in the scientific understanding of stocks, allowing prices to more accurately reflect supply and demand and assist in a more targeted, risk-based approach to fisheries enforcement.

25. Fisheries Administrations are taking a number of steps to modernise UK fisheries management including work to reform the quota management arrangements; to get greater catching sector involvement in fisheries science; to establish a better compliance culture in the UK; and to tackle discarding.

The resource base

Overview

26. Fish and shellfish stocks have the potential to be a valuable and renewable resource. This is the 'raw material' which largely determines the capacity and economic potential of the catching sector. At present several important stocks are fished at levels considered to be unsustainable, and rebuilding these stocks is a priority for fisheries management. We see developing a healthier age structure and then managing the stocks sustainably as particularly important.

27. Apart from the direct effect of fishing on the stocks themselves, fishing has also resulted in loss of habitat, altered predator/prey relationships, and may have changed the genetic makeup of stocks. There are also changes in the marine environment that can be ascribed to climate change and the impacts of other human use of the aquatic environment. It is important to recognize that the pressures put on stocks through human activities such as fishing reduce their resilience to other pressures such as climate change. All of these factors increase the uncertainty over how and when those stocks in recovery will recover and to what levels.

28. Nevertheless, it is widely accepted that sustainable management plans, if properly followed through, can return stocks to higher levels of abundance. It is also accepted that larger stocks, with a healthy age structure, will be more resilient, not only to fishing pressure but also to climate change and other impacts.

Gadoid species

29. The cod stocks in the North Sea[23], the West of Scotland and the Irish Sea are at low levels and are subject to an EU Recovery Plan. If the recovery plan is successful, recovery to safe levels would take a number of years. By-catch of cod is also a concern though we anticipate that there is some scope to address this through technical measures. Haddock stocks naturally fluctuate greatly, but current low fishing pressure means the stock is being fished relatively sustainably and, if fishing pressure does not increase, should ensure a continued good harvest (although the age structure of the stock needs to be improved). A number of whiting stocks are at low levels and the science on their stock trends remains largely uncertain. Fishing pressure on haddock and whiting are strictly regulated through the Cod Recovery Plan. Saithe should continue to give good yields as at present, provided effort does not increase to an unsustainable level.

Pelagics

30. The stocks of herring, Mackerel and Blue Whiting have declined in recent years which has resulted in reduced fishing opportunities. This is despite the management plans for Herring (North Sea) and Mackerel being followed. There are particular concerns about the recruitment of North Sea herring, and about fishing pressure on blue whiting. Horse mackerel stocks are in a reasonable condition and should continue to give reasonable yields if they continue to be fished at moderate levels. Atlanto-Scandian herring is in a healthy state with high returns for the fishing industry.

Flatfish and others

31. The current state of flatfish is mixed, and generally effort is too high. As fishing effort is reduced good yields should be generated around the long term average for stocks of Dover sole, plaice, megrim, lemon sole and dabs. However, recovery could take a number of years and ecosystems may not return to their original state. Plaice would be especially adversely affected by a warming of the seas; however, there would be an immediate benefit to the stock in reducing the current high discard rates. Anglerfish (monkfish) are an economically important species and are widespread in the whitefish fisheries around the UK. Although the stock is fairly healthy at present and seems to be more abundant than in the recent past, too little is known of its biology and stocks may therefore be at risk of over-exploitation in the medium to long term.

[23] Including the Eastern channel (Area VIId)

Nephrops

32. The main Nephrops stocks are thought to be in good condition and are expected to continue to give good yields and stable healthy stocks, provided current levels of fishing effort do not increase.

Other shellfish

33. Many shellfish fisheries are currently at sustainable levels, but there are particular concerns in some places about the pot or creel fisheries[24] and in some scallop fisheries where there is increasing effort due to diversification of vessels from declining finfish fisheries. There is limited science on a range of shellfish stocks. There is scope for innovation within the shellfish fisheries, including diversification to new species.

Eels

34. It is generally recognised that the European eel *(Anguilla anguilla)* stock is in a perilous state, with a 99% reduction in juvenile numbers having been seen in recent decades. The decline in numbers of young eels entering UK rivers has mirrored the decline in the EU stocks as a whole.

Fisheries dependent communities

35. There are a number of communities in the UK for which fisheries activity provides important income. Many of these communities are rural, with few existing employment alternatives; contraction of fishing opportunity could have significant socio-economic implications for these communities. UK Administrations will seek to ensure the sustainable development of these communities.

[24] The main species caught in pots or creels in the UK are lobsters, crabs and whelks. In some places creeling for Nephrops is also significant,

SWOT Analysis of the UK catching sector

Strengths

- Certain stocks healthy and fished at sustainable levels
- Diversity of species and development of shellfish mariculture
- Proximity to good quality fishing grounds in many regions leads to lower costs and fresher products
- Pelagic and shellfish sectors are profitable (their importance varies on different parts of the coast)
- Strong local fishing tradition and heritage resulting in a good name for seafood and a competitive buyer threshold
- Fish is seen as a healthy food; increasing demand for fish products

Opportunities

- Stocks not currently fished sustainably are capable of recovery to a healthier and more stable state in the long term
- Moves at EU level to develop maximum sustainable yield targets offer the prospect of long term management plans and more stable fishing opportunities from year to year
- Scope for innovation within the shellfish fisheries, including diversification to new species
- Some sustainable diversification into non-quota species e.g. exploitation of a new species as a result of climate change
- Marine Bill provides an opportunity to modernise inshore management
- Stakeholders able to influence policy more via Regional Advisory Councils (RACs)
- Collective initiatives e.g encouraging fishers and marine scientists to work together
- Development of practices to increase catch value for new markets; best practice in catching and handling
- New geographic and new product markets; regional brands
- Adoption of innovative selling methods e.g. internet and remote auctioning
- Improved economic incentives to encourage sustainable fishing practices and supply chain cohesion
- Strategic alliances, vertical supply chain integration
- Increasing consumer awareness of sustainably sourced product
- Move to cleaner vessel engines
- Move towards marine stewardship role
- Examining ways to move towards the maximum sustainable yield could provide ways to make the industry more operationally efficient

Weaknesses

- Many fragile stocks under fishing pressure, particularly cod and some other whitefish.
- Mixed fishery makes it difficult to manage stocks sustainably
- Displacement of offshore fishing capacity inshore; inshore environments are fragile ecosystems under significant anthropogenic pressure.
- Limited science on climate change and stock recovery
- Management system dependent on single stock assessment, which is costly in terms of stock survey work
- Environmental challenges remain, e.g. on tackling discards and by-catch
- Some areas lack skilled labour and the workforce is ageing; poor levels of profitability are leading to problems with recruitment and retention
- Difficulty in assessing future revenues owing to a range of operating factors hinders investment; poor business management skills in some areas
- Ageing fleet; many engines are relatively fuel inefficient and polluting
- Ability to pass on input costs is limited
- Fragmented representation, lack of sector cohesion and limited co-operation with authorities
- High administrative burden for catching sector; complex management system
- Sector vulnerable to expanding regulatory controls and resistant to change
- Limited data, particularly from smaller vessels
- Failure to market face; sub optimal marketing structure; lack of connection with the consumer
- Poor levels of traceability

Threats

- Some species at risk of stock collapse
- Uncertainty caused by annual variations in Total Allowable Catch (TAC) discourages long-term planning and investment by fishermen
- Unpredictable changes to marine ecosystems
- Climate change may alter water temperature profiles affecting productivity of key commercial species
- Shellfish poisoning, disease
- Intertidal habitats such as saltmarsh reducing through coastal squeeze and insensitive developments
- Fleet size may fall below the critical mass that can sustain local infrastructure
- Costly, stricter regulations for catching that may not achieve intended objectives
- Exchange rate fluctuations
- People leaving the catching sector to higher paid alternative employment
- Inability to compete with imports to the UK
- Illegal, Unregulated and Unreported fishing
- Competition for marine resources
- Fuel price increases putting profitability of fishing fleet under strain, particularly the most fuel-intensive

	segments of this

SWOT Analysis of the UK fish processing sector

Strengths

- Good quality products recognised by the public Growth of the more value added secondary sector, particularly the chilled market
- There is currently good availability of supply; good relationships with vessels and aquaculture businesses
- Brand loyalty; brand development
- Good customer service
- Strong customer base
- Availability of migrant workers
- Economies of scale through consolidation
- Some processors are technically advanced
- Some good investment in equipment
- Development of best practices that are in line with other parts of the food market
- Purchasing capability of UK secondary processing industry
- Business support for the processing sector e.g. SFIA, regional bodies
- Improved diet through increased levels of fish and shellfish consumption

Weaknesses

- Uncertainty over future supplies
- Insufficient focus on good practice amongst catching sector in relation to quality and product handling
- Over dependence on Nephrops
- High overheads e.g fuel
- Staff recruitment and retention is an issue in some areas due to an ageing workforce and lack of training
- Sector profile and management practices could improve
- Working conditions and safety standards are mixed
- Lack of supply chain coherence and too many middlemen – supply chain too long; not enough customer feedback
- Lack of trust and co-operation between processors
- There are many unsuitable premises for food processing e.g. a lack of processing capacity for pelagic species and overcapacity of whitefish processing
- Small processing sites can lead to a lack of supply and volume
- Transport infrastructure/services are weak in some areas

Opportunities

- The provision of sustainably sourced seafood products
- Diversification into other species, both farmed and wild
- Mariculture, land-based aquaculture
- There is a growing market for seafood especially shellfish
- New product development
- Market premium for quality initiatives
- Niche markets have opened in the catering sector
- Local branding; local promotion of seafood (awareness of food miles)
- Selling using e-commerce
- Assurance schemes of quality and of sustainable sourcing, improving standards of labelling, traceability and freezing
- Training improvements
- Improving transport e.g. air, live transports
- Utilisation of by-products
- Improvements in packing and shelf-life technology
- Improvements to supply chain co-operation

Threats

- Fluctuations in local raw material supply and quality
- Rising cost of raw materials
- Lack of market processing capacity for pelagic species; UK's leading share of home market is declining
- Increasing dominance of multiples controlling the supply chain
- More efficient and cost-effective processing abroad,
- Food scares
- Potential negative image of fish products, partly related to environmental damage, partly to inadequate labelling to identify source, capture method, etc
- Higher levels of regulation, e.g. waste disposal legislation
- Predatory approach to UK market by other countries
- Loss of available migrant workforce

SWOT Analysis of the UK aquaculture sector

Strengths

- Shellfish farming requires limited inputs
- Continuity of quality and supply
- Large domestic market for fish and shellfish products
- Markets are well established (salmon, trout, mussels, oysters)
- Health benefits of some products are documented (e.g. omega-3 fish oils), increasing their marketability
- Premium brands (e.g. Scottish salmon, Whitstable oysters, Conwy mussels)
- Controlled farming systems allow for full traceability of product
- Fish are the fastest growing component of the protein food market; potential for further growth
- Organic production standards are already established for some finfish species (e.g. salmon, trout, cod) and more recently for bivalve molluscs.
- "High aquatic animal health status allows controls that help reduce the likelihood of introduction and spread of diseases."

Opportunities

- The farming of new species, both indigenous and non-indigenous
- High consumer demand for both finfish and shellfish
- Better representation and marketing likely to boost sales
- The formation of strategic marketing links will benefit the aquaculture sector as a whole
- New technology, such as full recirculation systems for finfish, has the ability to significantly mitigate environmental impacts
- New technologies can be applied to production nutrition, health and reproduction
- Reliance on fishmeal for feed may be reduced through better utilisation of by-products and trimmings and technological advances and the availability of more vegetarian feeds
- Application of quality management techniques
- Potential for aquaculture in new areas (e.g. opportunities further offshore)
- Water quality may be improved through culture techniques (e.g. bivalve mollusc cultivation)
- Consultation with NGOs and other environmental groups on siting/impacts of aquaculture businesses can mitigate environmental concerns
- Requirement to meet environmental standards and greater sustainability should lead to better saleability

Weaknesses

- Reliance of sector on wild-caught species for fish feed
- Dependence on wild-caught spat for culture of some species of shellfish (environmental impact; leaves the sector vulnerable to variation in spatfall)
- Disease control can be difficult in open systems; lack of licensed medicines
- Job numbers created may be relatively low; there is a skill and labour shortage
- Some media reports have portrayed a negative image of farmed fish
- Product quality standards could be better developed for the shellfish sector
- Environmental, water quality and animal welfare issues
- Sector feels over-regulated
- Industry associations do not represent all producers
- The management of predation problems has the potential to conflict with conservation objectives
- Lack of local processing
- Expense of onshore facilities such as recirculation systems, and lack of sites in some areas
- It can take significant time to establish farms and may require high capital investment
- Limited number of funders of research and development in comparison to other animal production industries

Threats

- Availability, sustainability and quality of fish meal, oil and other feed ingredients (considerable fishing pressure on the industrial fisheries)
- Water quality deterioration (though should improve under Water Framework Directive)
- Disease and parasites/availability of disease control – relevant to all farmed species
- Transmission of disease (in both directions) between farmed and wild stocks
- Impact on wild stocks of sea trout and salmon
- Resource competition and conflict (e.g. with tourism)
- Constraints on environmental carrying capacity of inshore waters to support cage fish farming
- Inadequate Environmental Impact Assessment of sites
- Competition from other sources (internationally) which may have cheaper and more efficient means of production
- Climate change may alter water temperature profiles affecting viability of producing some species
- Non-native introductions and associated impacts including competition and disease transmission
- Illegal gathering in shellfish beds
- Mobile gear fishers (mariculture)
- Customer base may react negatively to media representation of the sector

SECTION 3: OBJECTIVES AND PRIORITIES OF THE UK 2007-2013

36. The overall aim for fisheries management in the UK is a fisheries industry that is sustainable, profitable and supports strong local communities, managed effectively as an integral part of coherent policies for the marine environment. We have set out our specific objectives for each of the themes and highlighted our key planned activities in these areas.

37. Further information on the Fisheries Administrations' objectives can be found in recently published documents[25] and in the Annexes to this Section. The European Fisheries Fund will help us to deliver our approach as set out in these documents.

THEME 1: SUSTAINABLE EXPLOITATION OF FISHERY RESOURCES (AND AS A RESULT OF THIS THE NECESSARY MANAGEMENT OF THE FLEET)

38. Principal objectives are:

- to promote sustainable fisheries consistent with a diverse and resilient marine environment;
- to ensure that fisheries management within the UK is seen as an example of best practice; and
- to promote high levels of confidence in the catching sector that lead to long term investment in innovation and technology.

39. We recognise that a successful and profitable catching sector for now and the future depends on a healthy marine environment. We want to secure the management of fish stocks as an important renewable resource, harvested to optimise long-term economic returns, to contribute to the wealth and well-being of fishing communities, to ensure that stocks are fished at biologically sustainable levels, discards are minimised and the marine environment as a whole is safeguarded.

40. It is, therefore, important that our fisheries and wider marine environment priorities should be jointly managed within the framework of sustainability. This should be part of an integrated marine management system where environmental, social and economic objectives are managed together to

[25] *Securing the Benefits (All Administrations), Fisheries 2027 – a long term vision for sustainable fisheries (Defra); A Sustainable Framework for Scottish Sea Fisheries (Scottish Executive), A Sustainable Framework for Scottish Sea Fisheries: Progress Report and Action Plan (Scottish Executive), Strategic Framework for inshore fisheries (Scottish Executive), A Strategic Framework for Scottish Aquaculture (Scottish Executive), Charting a New Course (Defra), The South Down Fishing Village Task Force Action Plan (DARD), The Rural Development Plan (EAFRD) for Wales (WAG), Strategic Action Plan for the development of the Welsh Fisheries and Aquaculture Sector (Welsh Development Agency). To be published in 2007: Northern Ireland Inshore Fisheries Review, Welsh Fisheries Strategy. To be published in summer 2008 a strategic framework for inshore fisheries and a National Food policy for Scotland.*

achieve clean, safe, healthy, productive and biologically diverse oceans and seas.

41. The following actions are planned to achieve our stated objectives.

Modernising marine management

42. We want to manage fisheries effectively within a healthy and flourishing marine environment.

43. Within the UK a number of initiatives are in place at both the management and legislative level to align and link better fisheries and environment issues. In April 2006, the fisheries and marine policy teams in Defra merged into a single Directorate and in Scotland a new marine directorate has brought together marine and freshwater fisheries, aquaculture and marine environment into a new Food Industry Unit. We believe this will allow the UK Government and Devolved Administrations to take a more integrated approach to fisheries management.

44. The new UK Government Marine Bill and marine legislation in Scotland will provide new legislative mechanisms for integrated planning, management and protection of the marine environment, creating a new, fit-for-purpose framework founded on the principles of sustainable development. It will help us to ensure that fisheries are managed effectively as an integral part of coherent policies for the marine environment. We will be considering what new powers will be needed to ensure integrated marine management and whether there is a case for establishing a new marine management organisation.

45. There are plans for changes to the quota management arrangements in the UK. The UK Administrations wish to improve the way quotas are managed so as to secure increased transparency and simplicity in the quota trading arrangements, as well as clarifying the rights to harvest this national resource. Quota should be used in a way that optimises economic value, supports wider social and economic objectives, and ensures our international fisheries obligations can be met through effective enforcement and compliance.

46. Work is underway across the UK to modernise our management of inshore waters. Although different approaches are being taken across the UK to effect this reform, there are common goals of conserving, enhancing and restoring commercial stocks and their supporting ecosystems, not only for the benefit of commercial operators but also for the wider benefits these ecosystems provide, including for recreational sea angling.

47. The UK supports the principles of more regional and responsive fisheries management with greater stakeholder involvement. In particular, we support the role of Regional Advisory Councils (RACs).

Sustainable stocks

48. We need to manage fish and shellfish stocks carefully for sustainability and to nurture and safeguard marine and freshwater resources and ecosystems including those on which the stocks and the fisheries industry depends.

49. The UK supports the objective of a “large stock” strategy, wherever possible, consistent with our international commitments (including those agreed at the World Summit on Sustainable Development - WSSD) on achieving maximum sustainable yield in fish stocks. We plan to take work forward between 2007 and 2013 to identify a suitable approach to work towards this, consistent with the European Commission’s Communication on maximum sustainable yield.

50. The UK is also developing measures to restore depleted fish stocks and protect vulnerable marine and freshwater species and habitats. We are working with stakeholders to identify ways of setting up Marine Protected Areas (MPAs) to assist the conservation of fish stocks. In addition, we will establish networks of MPAs to maintain and restore biodiversity under international commitments including the Convention for the Protection of the Marine Environment of the North-East Atlantic (OSPAR) and Natura 2000. Protection of important species and habitats may require fisheries controls in some locations or on some types of activities and the EFF could support transitions within the industry to achieve wider environmental outcomes e.g. support for technological changes, , investment in new gear, MSC (or similar) accreditation. There are also key gaps in data on the distribution of species and habitats in our waters and fishermen’s organisations could potentially support efforts by fishermen to contribute towards filling these gaps.

51. We aim to improve the environmental performance of fishing activities to encourage and increase stewardship by the catching sector of the marine environment. We already have measures in place to tackle by-catch and discarding in our fisheries, in the main through technical conservation legislation at EU and national level. UK measures include legislating for the banning of lifting bags in some white fisheries to reduce discards of juvenile whitefish. However, by-catch and discard problems remain. The UK will support a major review of EU technical conservation legislation which began in 2006 which will set the framework for such measures in the next few years. We will support either through pilot projects or funding, in collaboration with the catching sector, projects on discard reduction, adoption of environmentally friendly gear and techniques, the accreditation or certification of fisheries as environmentally friendly and environmental monitoring. Some pilot studies have already been carried out on tackling both by-catch and discards and more are planned. We will identify appropriate targeted follow-up actions to these studies.

52. Examples of existing worthwhile accreditation and certification schemes are the Sea Fish Industry Authority Responsible Fishing Scheme[26] and the Marine Stewardship Council's scheme that relates to sustainable fisheries management[27].

53. The UK will also explore more broadly how it might promote more sustainable patterns of fish and shellfish consumption both at home and internationally in line with our WSSD commitments and objectives set out in the UK Sustainable Development Strategy and in the Scottish Sustainable Development Strategy launched in 2005.. Retailers are looking to offer more sustainable products and reflect growing awareness of the carbon footprint of all their products.

Maintaining and enhancing marine fisheries science

54. Independent, high quality science is a fundamental part of a successful fisheries management system. We want to improve our understanding and decision-making by maintaining and enhancing marine fisheries science. In 2005 the UK commissioned a study to explore ways of improving the science supporting current and future management needs in the area of marine bioresources[28]. Based on the findings of this study the UK Fisheries Administrations and the Natural Environment Research Council (NERC) has developed a collaborative research programme 'Sustainable Marine Bioresources' to encourage innovative science, and harnessing and co-ordinating the UK's wider science capabilities. We will continue to invest in science and target our research effectively to work towards an ecosystems based approach to fisheries management. We will also work to ensure that accurate catch data is provided by the catching sector.

55. We want to increase stakeholder involvement in fisheries science to bring different interests together and build trust and confidence in the system. A number of initiatives are already underway to increase catching sector involvement in stock assessment and data collection. A variety of approaches is being taken in the UK, ranging from formal industry science partnerships and joint research to more informal arrangements. The UK has also taken the lead in establishing MariFish, a network of the major funders of European marine fisheries research. This Commission-funded action, which started in January 2006, is managed by the UK, and will run until 2011. It will lead to greater coordination between the 17 partners.

[26] A vessel-based accreditation scheme. SFIA offer a specification for best practice and responsible fishing to individual vessels. A Responsible Fishing Certificate is issued where assessment is successful.

[27] The Marine Stewardship Council is an independent non-profit organisation that promotes responsible fishing practices. It certifies fisheries as "well-managed and sustainable". These fisheries can put the MSC logo on their products.

[28] Science for Sustainable Marine Bioresouces : a report for NERC, Defra and SEERAD. Manuel Barange, May 2005.

Matching fleet capacity to resources

56. To achieve a sustainable catching sector and minimise environmental impacts, the size and capacity of the fleet should be in balance with long term fishing opportunities. The UK Fisheries Administrations made funds available for decommissioning in the whitefish fleet in 2001, 2003 and 2007. Administrations in the UK will continue to review the balance between fleet capacity and catching opportunity and make suitable interventions where appropriate. The recent steep rise in fuel prices is a new factor in the situation. The need, and possible machinery, for further adaptation action to deal with this is currently under urgent study at EU and national level. Assuming that fuel prices continue at their current levels, substantial further reductions in fleet capacity are likely to be required.

THEME 2: SUSTAINABLE DEVELOPMENT OF AQUACULTURE, INLAND FISHING AND PROCESSING AND MARKETING OF FISHERIES PRODUCTS

57. Principal objectives are:

- To provide conditions in which the fisheries industry can be profitable in the long term and competitive, in both global and local markets to the benefit of producers and consumers.
- To promote an aquaculture sector that works in harmony with nature; protecting the health and welfare of farmed and wild stocks, safeguarding the environment and benefiting local and national economies.
- To ensure the conservation and health of fish and shellfish, including through improving bio-security and disease control measures and sustainably sourced feed.

58. The following actions are planned to achieve these objectives.

Aquaculture

59. The UK supports the sustainable development of the aquaculture sector. However the sector is of varying significance around the UK, the majority of which is in Scotland, and therefore the extent and pattern of intervention varies by the different Fisheries Administrations.

60. Examples of actions being taken by Administrations include work to improve bio-security and disease control measures, support for new or improved production facilities and modernisation of the regulatory framework, develop relocation priorities and undertake SEA of relocation plans.

61. Increasing emphasis is being placed on improving the environmental performance of aquaculture e.g. addressing issues including the impact on wild salmon and sea trout stocks, on the seabed below finfish farms

and on the wider marine ecosystem. To this end, the Tripartite Working Group, which brings together representatives from government, industry and wild fish sectors, was set up in 1999 with a view to building trust and consensus and seeking solutions to shared problems. The Group has the twin goals of maintaining a healthy stock of wild fish whilst promoting a sustainable aquaculture industry to the benefit of local communities. As a 'priority for action' under the Strategic Framework the industry has produced its own 'Code of Good Practice' for both shellfish[29] and finfish[30], which were launched in October 2005 and January 2006 respectively. These codes provide advice and guidance on containment standards, treatment practices, operational procedures and other best processes to protect the wider environment.

62. A Code of Practice to minimise the risk of introduction and transfer of alien species is also being developed by industry and statutory conservation bodies.

63. There is potential for the expansion of aquaculture, in both the finfish and the shellfish sector (the latter is generally viewed as having a minimal impact on the surrounding environment). There is scope for direct community involvement in the shellfish sector through investment or participation in small-scale shellfish farming. Consideration will be given to the scope for the development of other aspects of the aquaculture industry, including offshore.

64. The UK has played an active role in the development of the EU Directive 2006/88 which will replace the existing fish health regime in 2008.

Inland fishing

65. UK Fisheries Administrations work closely with their agencies to conserve salmonids, eels and freshwater fish in order to maintain biodiversity and the economic and recreational opportunities provided by these fisheries.

66. European eel stocks have declined dramatically in recent years and stocks in the UK have mirrored this decline. It is important that action to tackle the decline is taken at a European level and the UK will work with the European Commission to achieve this.

67. Legislative changes planned in the UK are likely to come into effect during the lifetime of the European Fisheries Fund. These changes will provide more flexible management for safeguarding of freshwater fisheries resources in Great Britain.

68. Work to implement the EU Water Framework Directive will benefit inland fishing during the 2007-2013 period. Expected benefits include improved access and habitat quality for spawning salmon, sea trout and eels.

[29] Association of Scottish Shellfish Growers Code of Good Practice
[30] Code of Good Practice for Scottish Finfish Aquaculture

Processing and marketing of fisheries products

69. In the UK we would like to see catchers and producers supplying what the market wants. We wish to see the development of efficient supply chains with strong links between fishermen, fish and shellfish farmers, processors and consumers. During 2007 –2013 work will be undertaken in the UK to help enable:

- improved promotion and marketing of high quality, sustainably sourced fisheries products in the UK and overseas; in particular, better exploitation of niche and premium markets and effective marketing of local food;
- greater public awareness of the health benefits of eating fish and shellfish;
- use of production methods that minimise environmental impact;
- greater communication, co-operation, integration and traceability throughout the supply chain;
- growth through innovation and exploitation of technology;
- waste minimisation, recycling and conversion of waste materials into useable byproducts;
- more sustainable patterns of consumption and production of fish and shellfish products that help break the link between economic growth and environmental degradation and resource use; and
- support towards diversification into new species and investments which will deliver quality improvements.

THEME 3: MEASURES OF COMMON INTEREST THAT WILL HELP DELIVER THE OBJECTIVES OF THE COMMON FISHERIES POLICY, SUPPORT THE SUSTAINABLE DEVELOPMENT OF THE FISHERIES SECTOR AND THE DEVELOPMENT OF NEW MARKETS AND PROMOTIONAL CAMPAIGNS

70. Principal objectives are:

- to promote high levels of confidence in the catching and aquaculture sectors that lead to long term investment in innovation and technology;
- to provide conditions in which the fisheries industry is profitable in the long term, competitive in both global and local markets to the benefit of producers and consumers; and
- to develop new markets and promotional campaigns including on quality and value enhancement for fisheries and aquaculture products.

The following actions are planned to achieve these objectives:

Simplification of legislation

71. The UK will work to ensure a “better regulation” approach to fisheries legislation, both in the UK and at EU level and will work to “streamline”

the implementation of aquaculture regulation. New policies should be accompanied by impact assessments that clearly set out the intended economic, social and environmental benefits and likely costs of the range of options under consideration.

72. We are already working with UK stakeholders, other Member States and the European Commission to help simplify existing UK and EU legislation, particularly where the costs of implementation are disproportionate to the benefits or where the legislation is not delivering the intended benefits. We will also provide clearer guidance and advice to the sector. Once this work is completed we will need to ensure that the impacts of new legislation are appropriately assessed and that we take opportunities to keep legislation as simple as possible and review older legislation if it becomes out of date.

Commercial strategies

73. We will work with the fisheries industry to develop commercial strategies within and between sectors. There are already instances of industry sectors working together on initiatives to improve local fisheries management, product quality, marketing and traceability. We will work to develop opportunities for new marketing and promotional campaigns which will support quality and value enhancement for fisheries and aquaculture products and access to improved market information. We would like to identify good management practices in order to help promote these more widely across the supply chain. We also want to help the catching sector to strengthen its capacity to assess and manage risk, to enable it to take better business decisions.

Involving stakeholders

74. Fisheries Administrations have set up various stakeholder advisory groups, with representation from the major interest groups, to assist them in developing fisheries and aquaculture strategy. Fisheries Administrations are also involving stakeholders in the development of fisheries management policies and improving the way they provide information for stakeholders and gather their views.

Structural and vessel improvements

75. We may, where there is clear demonstrable added value, support the maintenance of port infrastructure. We may also support the development of measures to improve fishing vessels, for example, to improve safety, selectivity of gear or quality handling of catch, as long as such improvements do not lead to an increase in fishing effort.

Health and Safety

76. The UK will encourage continuous improvement and adoption of health and safety standards and practices in the fisheries industry.

THEME 4: SUSTAINABLE DEVELOPMENT AND QUALITY OF LIFE IN FISHERIES AREAS

77. The principal objective is to:

- tackle social exclusion and promote long term prosperity in communities traditionally dependent on the catching sector.

The following actions are planned to achieve these objectives.

78. Fisheries Administrations will build on existing work to assess the vulnerability and dependence of fishing communities. This assessment will be used to prioritise any interventions.

79. Responsibility for the economic development of coastal communities is devolved to each of the UK administrations. Administrations will work with regional bodies towards a viable future for fisheries dependent communities.

80. The UK supports the European Commission's approach of broadening measures to promote diversification in coastal communities and measures to strengthen the competitiveness of fishing communities that complement the measures available under the other three themes. We also want to encourage environmentally sensitive fishing methods and aquaculture-rearing technologies, alongside measures to bring added value to the fish caught by our fleet through improving product quality at all stages and through processing. Where transition to a smaller fleet will affect vulnerable fishing communities, the need for regional support for local economies will be addressed. The provenance of funding for this could be varied and would depend on the circumstances in any given situation.

81. We will work with regional and local bodies towards a viable future for fisheries dependant communities. Our approach will need to ensure that the environmental, economic, social and biological considerations are all taken into account to achieve a balance that represents sustainable development.

THEME 5: CROSS-CUTTING ISSUES: HUMAN CAPITAL, THE PROTECTION OF THE ENVIRONMENT, COMPLEMENTARITY BETWEEN EFF AND OTHER EU FUNDS

Human capital

82. Our long term goal is a UK fisheries industry that is sustainable and profitable, without the need for operating aid. A robust sector should have sustainable levels of employment with improving security and quality of employment. To achieve this, the sector will need to work together with other agencies and develop a culture of innovation and investment in

people. Each Administration, working with regional partners, will consider how best to help the industry invest in skills, in line with regional and rural development priorities. Actions might include support for professional training, safety training, re-skilling or for diversification of employment in fisheries dependent areas.

Protection of the environment

83. The UK will continue to support actions that help the European fisheries and aquaculture sectors to improve their environmental performance. Whether it be through reduced environmental impacts from fishing gear, improved bio-security at fish farms or reduced waste in the processing sector all parts of the industry have scope to improve their environmental performance. Priorities may vary between Fisheries Administrations, but actions might include research and pilot projects, training, accreditation and the adoption of environmentally positive practices.

Complementarity between EFF and other EU funds

84. The UK National Strategic Plan has been developed in parallel with National Strategic Plans for the Structural and Cohesion Funds and the European Agricultural Fund for Rural Development. All three funds will be able to finance activities that support rural development. We will seek to ensure that where EFF funding is used, it complements and adds value to that provided by other EU funding programmes. Whilst delivery of the three funds will be clearly demarcated, we will strive to ensure that EFF delivery mechanisms are co-ordinated with those of the other two funds, to maximise the benefits of funding. Further detail about how this will be achieved will be included within the Operational Programme.

THEME 6: GOOD GOVERNANCE OF THE EUROPEAN FISHERIES FUND

85. The UK will ensure awareness and understanding of the EFF programme amongst our delivery partners and key stakeholder groups through a variety of methods.

86. For the EFF, we will maintain and keep under review the management and control systems established under the FIFG scheme, in line with Articles 57 to 71 of the EFF Regulation.

87. We will analyse and review EFF spending on a regular basis, conducting an interim review of the Operational Programme in accordance with Article 47 of the EFF Regulation.

MEETING THE REQUIREMENTS FOR INSPECTION AND CONTROL OF FISHING ACTIVITIES; DATA AND INFORMATION COLLECTION ON THE CFP

88. In the UK, sea fisheries enforcement and data collection are carried out by the Marine Fisheries Agency (MFA) in England and Wales[31], by the Scottish Fisheries Protection Agency (SFPA) in Scotland and by the Sea Fisheries Inspectorate in Northern Ireland.

89. UK fisheries enforcement organisations deliver a range of management and enforcement services that contribute to promoting the sustainable use of the marine environment. Fisheries management services include quota management, vessel licensing, fleet capacity management and the monitoring of the Economic Links programme for UK fishing vessels. A significant proportion of the organisations' work centres on the enforcement of marine fisheries regulations. The enforcement tools used include inspections at sea and in port, air surveillance and satellite tracking data. UK enforcement organisations also work with government colleagues, fishermen, conservation organisations and other users of the marine environment to provide a valuable input into decisions on how the marine environment is used.

90. The MFA is also responsible for the management, analysis and reporting of UK fisheries data to meet UK, EU and international reporting obligations and to support the development of policy. It ensures compliance with Data Collection Regulation (EC) 1543/2000 by co-ordinating national programmes of work to provide data as required for the operation of the CFP, including scientific survey work and the collection of economic data on the catching sector.

91. We plan to continue to improve our enforcement, supported by technology, risk management approaches and by working with the catching sector. We will adopt a risk-based approach to monitoring, control and surveillance which will include identifying areas at greatest risk of non-compliance and the most vulnerable stocks, and targeting our efforts there.

92. With the continuing growth of the EU aquaculture sector new community legislation has been proposed for the range of reported aquaculture data to be broadened. Aquaculture contributes 27% by value to the total EU fisheries production. Availability of more extensive data will support measures for the development and management of aquaculture under the Common Fisheries Policy.

93. As of 17th February 2006 there were 204 British Sea Fishery Officers (BSFOs) at coastal locations and in HQ units within the United Kingdom.

[31] In England and Wales, twelve Sea Fisheries Committees (SFCs) regulate and enforce their own (and some national and EU) requirements for fisheries and environmental purposes in in-shore waters at a cost of around £5 m pa. The Environment Agency is SFC in a number of estuaries and has other responsibilities in in-shore waters.

These officers are engaged full time on sea fishery enforcement issues[32]. The Royal Navy fishery protection squadron patrols English, Welsh and Northern Ireland waters and is made up of 3 offshore and 3 inshore vessel; they have a total complement of 26 BSFOs. The SFPA fleet patrolling Scottish waters is made up of 3 offshore and 1 offshore/inshore vessels with a complement of 38 BSFOs. The SFPA operates two Cessna planes for aerial surveillance, and surveillance of English, Welsh and Northern Ireland waters is carried out under contract by a civilian company using a Cessna.

SUPPLY OF FISHERIES PRODUCTS AND THE DEVELOPMENT OF FISHING ACTIVITIES OUTSIDE COMMUNITY WATERS

94. The UK is a significant net importer of fish and fish products and would like to see the freeing up of trade in this sector, in particular of imports to the EU of fish and fish products.

95. The UK supports the Council Conclusions of July 2004 on the Fisheries Partnership Agreement. In particular, we support Community action to:

- contribute towards rational and sustainable exploitation of the surplus of coastal States' marine resources, in particular by preventing the overfishing of stocks which are of interest for local people;
- contribute towards strategies for the sustainable management of fisheries as defined by the coastal State, in particular by taking account of the development programmes elaborated at national and/or regional level with Community assistance in accordance with cooperation or association agreements; and
- improve scientific and technical knowledge of the fisheries in question, taking into account the existing and necessary work in the field carried out at the appropriate regional level and taking into consideration the likely impact of fishing on the environment, notably by proposing to its partners the setting up of scientific and technical committees at the appropriate level.

96. The UK will seek to ensure that any new agreements reached by the EU with 3rd countries are in line with these conclusions and also consistent with other policies within the EU particularly those on Development.

97. The UK is working with other countries and organisations to combat Illegal, Unregulated and Unreported (IUU) fishing, consistent with commitments made at the 2002 Johannesburg World Summit for Sustainable Development. We are contributing to the implementation of the High Seas Task Force report published in March 2006 and will work with the European Commission and EU Member States in following up its recommendations.

[32] In addition, in England and Wales, the 12 Sea Fisheries Committees and Environment Agency have almost 100 officers carrying out fisheries enforcement in the 0-6 mile limits and in some estuaries.

DELIVERY OF UK NATIONAL STRATEGIC PLAN

98. The UK is already working to deliver the objectives set out in this plan and will continue to do so through existing and new workstreams. The level of priority attached to each theme will differ in each Administration.

99. The European Fisheries Fund will be one of a range of policy tools and mechanisms that Fisheries Administrations will use to deliver this plan. The achievement of certain objectives, particularly under Theme 1, will require reform of the Common Fisheries Policy. The UK will work with other Member States and the European Commission to prepare for and implement appropriate reform of the Common Fisheries Policy to enable us all to optimise the benefits from a shared and vulnerable natural resource.

100. The UK will target its European Fisheries Fund spending towards interventions that provide best value for money and Administrations will make these decisions independently. Further information on the UK's spending priorities for the EFF will be contained in the UK's Operational Programme.

Strategic Indicators

101. Baseline data for the most recent available year will be supplied with the UK National Strategic Plan. Further updates will be provided at the mid-point and at the end of the European Fisheries Fund programme. Progress at the mid-point will inform the implementation of the Operational Programme during the second half of the Fund programme.

1. Overall Objective of the Operational Programme

The overarching aim of fisheries management in the UK is a fisheries industry that is sustainable, profitable, well managed, internationally competitive and helps support thriving, diverse, and sustainable local communities, managed effectively as an integral part of coherent policies for the marine and freshwater environment. The UK intends to use the EFF programme to help deliver this aim. The overall objective of the Operational Programme is to contribute to the overarching aim of UK fisheries management. To test whether this overall objective is being met, the UK proposes to use the following impact indicators:

Impact indicator	Baseline 2006	Mid-term objective 2010	End target 2015
Gross Value Added	£988m €1,449m[33]	£1,030m €1,510m	£1,070m €1,550m

[33] Office for National Statistics

Gross exports from UK	£944m €1,385m[34]	£1,022m €1,500m	£1,128m €1,660m
Note – Targets are provided in Sterling and Euros – work will focus on achieving the Sterling target due to the fact that exchange rate movements could negate a positive national result.			

2. Sustainability objective – improve the balance between fishing effort and opportunity

A sustainable, profitable catching sector relies on healthy fish stocks and a healthy marine environment more broadly. One of the greatest threats to these is over-fishing caused by over-capacity. This is defined by the balance of fishing effort and fishing opportunity. Restoring this balance where appropriate will largely be achieved by a reduction in the capacity of the fishing fleet, but also by employing measures that reduce fishing effort. Such action will be concentrated on those segments of the fleet which currently target the fish stocks which are most under pressure, and are the least profitable. However, current uncertainties arising from the very steep recent increases in fuel prices and from continuing consideration of appropriate response measures at EU and member state level make it impossible to set a useful and meaningful target.

Indicator	Source of data	Baseline (2007)	Control level (2010)	Target (2015)
Total UK fleet capacity (tonnage of vessels (tonnes))	Marine and Fisheries Agency	212,844		Current expectation (not a target) of 10-15% reduction

Additional targets will be set related to measures under Axis 1 to promote fleet adaptation and to ensure vessels are able to operate competitively and efficiently. Results indicators will be as follows:

Indicator	Source of data	Baseline (2007)	Control level (2010)	Target (2015)
Value of fish landed per vessel (tonnes)	Marine and Fisheries Agency	£95,000 €140,000	£100,000 €146,000	£111,000 €164,000
Training uptake (numbers attending training courses)	Seafish Industry Authority	6,130	6,300	6,550

[34] Office for National Statistics and HM Revenue and Customs

Note: Targets are provided in Sterling and Euros - work will focus on achieving the sterling target due to the fact that exchange rate movements could negate a positive national result.

3. **Profitability objective - maximise returns**

A key driver of profitability is increasing returns from the same inputs. The UK objective is to facilitate the increase in profitability, for example by improving the quality and first sale value of products, increasing marketing, developing premium brands and developing new and niche markets. The chosen indicator is GVA per capita employed as there is insufficient data on profitability to use this as an indicator.

Indicator	Source of data	Baseline (2006)	Control level (2010)	Target (2015)
GVA per capita employed.	Office for National Statistics	£36,593 €53,681	£43,017 €58,744	£52,655 €65,749
Note – Targets are provided in Sterling and Euros – work will focus on achieving the Sterling target due to the fact that exchange rate movements could negate a positive national result.				

4. **Development and competitiveness of the fisheries industry with other sectors within the UK**

Fish are a global commodity and UK businesses compete with their counterparts across the world. The comparative performance of UK businesses in this context depends on a range of factors including the efficiency of operations and the wider operating environment. In addition, the fisheries sector needs to be comparable in its performance with other sectors of the economy. The suggested indicator is as follows:

- Indicator will be the GVA per capita for the fisheries sector as a percentage of that for other sectors of the economy in the UK
- Target will be to maintain the level of performance of the fisheries sector above the level seen for the performance of the economy as a whole. As such the target will be to maintain the current level of the GVA per capita for the fisheries sector at 110% (i.e. 10% higher) of the level of the economy as a whole. Note – this is a watching indicator and actions are thus not required unless the relative performance deteriorates from the current position. Also this target may be revised to focus the comparison to be between the fisheries sector and other manufacturing industries or the agriculture/food industry in the UK.

Indicator	Source of data	Baseline (2006)	Control level (2010)	Target (2015)

GVA per capita employed as a percentage of the overall GVA per capita for manufacturing industries as a whole	Office for National Statistics	110%	110%	110%

5. Development and competitiveness of the fisheries industry with the fisheries sectors in other Member States

Comparison of the trend in the relative performance of the fisheries sector in the UK against the fisheries sector in other Member States through comparison of the trend in the GVA per capita seen for the fisheries sector in Member States. Note - the extent to which the comparison will be possible (in terms of the other Member States to which the UK can be compared) will depend on the availability of comparable information from other Member States. This information will be collated either from sources at Eurostat or by establishing direct contacts with other Member States to provide the information required:

- Indicator will be an index time series with 2006 set as 100 to identify the trend in performance of each Member State of the GVA per capita for the fisheries sector
- Target will be for the UK to match or exceed the trend in the performance in other Member States – NB this will need to be borne in mind with the earlier objective for improvement in performance of the profitability of the sector which is to maintain a 2% annual increase in the level of GVA per capita for the fisheries sector. This indicator will give some idea of whether or not this 2% indicator is sufficient for the industry in the UK to retain its level of competitiveness with that in other Member States.

Indicator	Source of data	Baseline (2006)	Control level (2010)	Target (2015)
Trends in GVA per capita employed for	Office for National Statistics / Eurostat /	To be determined[35]	To be determined	To be determined

[35] The initial target will be to have information prepared for November 2008 - at this time the GVA results at the industry level for 2007 and the more detailed breakdowns for data for 2006 (i.e. at administration level and below) should be available. This will also allow time for the sources of corresponding data from other Member States to be identified, for historic data to be received and an initial assessment made of the relevant trends in this indicator to allow a control level for 2010 and a target for 2015 to be determined.

the fisheries sector compared to the GDP per capita figures for other Member States	Other Member States Statistical Offices			

Additional targets will be set related to measures under Axis 2 to promote the growth and diversification of aquaculture, processing and marketing of fishery and aquaculture products. Results indicators will be as follows:

Indicator	Source of data	Baseline (2006)	Control level (2010)	Target (2015)
Turnover of UK aquaculture sector	Office for National Statistics	£507m €720.4m	£550m €781.5m	£600m €852.5m[36]
Turnover of UK processing sector	Office for National Statistics	£2,247m €3,192.8m	£2,410m €3,42.4m	£2,640m €3,751.2m
Note – Targets are provided in Sterling and Euros – work will focus on achieving the Sterling target due to the fact that exchange rate movements could negate a positive national result.				

6. Indicators of achievement under Axis 4 (in the 4 UK fisheries administrations)

The sustainable development of fishers communities is an important element of the UK's overarching objectives to be achieved within the context of the EFF. The limited amount of funds available under EFF require that an integrated approach is taken and that targeted fishery areas are carefully identified. The following indicators will be used to ensure that the funding available under Axis 4 is received and used appropriately:

[36] Increases in the production of farmed fish and shell fish are being fuelled in part by the increased interest in niche markets giving rise to higher prices and a need for increased production. The Scottish Salmon Producer's Organisation has set a target of an increase in production of 4% annually, with 2008 alone predicted to achieve a 6-7% increase. The Association for Scottish Shellfish Growers believe that this sector has a huge potential for growth, between 2003 and 2007 the production of mussels achieved a 13.2% increase. There has also been significant increases in the production in alternative species, especially cod, although this forms a relatively small percentage of overall production but it is expected that there will be a continued increase

Indicator	Source of data	Baseline (2007)	Control level (2010)	Target (2015)
More than 30% of the Local EFF Groups can demonstrate improved management skills among fisheries operators	Responsible public authorities	n/a	40% (action plans will be developed for improving skills if required)	100%
That, as a result of activity by Local EFF Groups the number of jobs safeguarded in sectors other than fishing/catching', i.e. related to on shore activities such as aquaculture, processing, distribution, etc. will not be less than 50 full time equivalents	Responsible public authorities	n/a	20 (action plans will be developed to strengthen Local EFF Group activities in support of work to safeguard jobs)	50 Full Time Equivalent

RESOURCE MOBILISATION

102. UK Government Departmental budgets for 2007-2010 was set in 2007, following a Comprehensive Spending Review. It is currently not possible to anticipate the future national financial resources available for the UK fisheries sector.

103. For information, a summary of spending on fisheries is provided below.

Administration

England

£000	**2003/04**	**2004/05**	**2005/06**	**2006/07**
Salaries, buildings, other fixed costs	3,914	4,017	4,915	4,836
Enforcement, research	47,667	43,585	27,508	29,000
Marine Fisheries Agency			21,900	31,187

Scotland (indicative allocations)

£000	**2003/04**	**2004/05**	**2005/06**	**2006/07**
Salaries, buildings, other fixed costs	1,390	1,556	1,790	n/a
Enforcement, research	35,018	34,743	36,269	n/a

Northern Ireland[37]

£000	**2003/04**	**2004/05**	**2005/06**	**2006/07**
Salaries, buildings, other fixed costs	749	1,040	964	n/a
Enforcement, research	2,090	2,819	2,843	n/a

[37] In Northern Ireland the fisheries inspectorate is not a separate agency and, therefore, the administrative costs associated with the fisheries inspectorate are included under the 'Salaries, buildings and other fixed costs' heading.

Wales

£000	2003/04	2004/05	2005/06	2006/07
Salaries, buildings, other fixed costs	250	300	400	450
Enforcement, research	n/a	n/a	n/a	n/a

* Enforcement costs for WAG included in Defra figure for the Marine Fisheries Agency acting on behalf of the WAG in Wales.
** The figures for administrative costs for subsequent years could increase quite significantly if the WAG proposal to take full responsibility for all Welsh fisheries is adopted.

Grant Funding

The following table shows the allocations of EFF funding by each of the seven calendar years of the programme, 2007-2013. These allocations are set by the EU, i.e. the initial profile of spending is set by the EU.

Convergence regions:

Year	EFF (€)
2007	
2008	7,132,154
2009	7,157,960
2010	7,182,351
2011	7,205,260
2012	7,226,620
2013	7,246,356
Total EFF	**43,150,701**

Non-convergence regions:

Year	EFF (€)
2007	
2008	15,112,454
2009	15,372,251
2010	15,637,246
2011	15,907,541
2012	16,183,241
2013	16,464,455
Total EFF	**94,677,188**

The following tables are the financing plan of the Operational Programme, giving the amount of the total financial allocation of the EFF, the national public contribution and the rate of reimbursement by priority axis, for convergence and non-convergence regions

Convergence regions

Priority Axis	**Total public contribution a=(b+c)**	**EFF contribution (b)**	**National contribution (c)**	**EFF co-financing rate (d)=(b)/(a)*100 (%)**
Axis 1	10,617,930	7,963,447	2,654,482	75
Axis 2	19,225,061	14,418,796	4,806,265	75
Axis 3	22,718,630	17,038,973	5,679,657	75
Axis 4	4,141,622	3,106,217	1,035,405	69
Axis 5	831,024	623,268	207,756	75
Total	**57,534,267**	**43,150,701**	**14,383,565**	**75**

Non-Convergence regions

Priority Axis	Total public contribution a=(b+c)	EFF contribution (b)	National contribution (c)	EFF co-financing rate (d)=(b)/(a)*100 (%)
Axis 1	63,342,716	31,671,358	31,671,358	50
Axis 2	38,341,830	19,170,915	19,170,915	50
Axis 3	65,163,846	32,581,923	32,581,923	50
Axis 4	16,984,466	8,492,233	8,492,233	50
Axis 5	5,521,520	2,760,759	2,760,759	50
Total	**189,354,378**	**94,677,188**	**94,677,188**	**50**

Anticipated benefits from EFF spending

104. The European Fisheries Fund will provide a mechanism to help the UK to deliver its strategic objectives. Through careful targeting of its EFF allocation, the UK will seek to enable the delivery of objectives at a faster rate or on a larger scale than would be possible without the funding. The UK expects funding under EFF to provide a financial incentive for sectors to make changes to their practices to make fisheries environmentally and economically more sustainable. A major benefit of using Axis 3 funding will be the encouragement of joint working within and between sectors; this will not only facilitate the achievement of policy objectives but will also be a means of improving communication within the supply chain.

DEVELOPMENT, IMPLEMENTATION AND MONITORING OF THE NATIONAL STRATEGIC PLAN

105. The UK National Strategic Plan draws on a number of existing strategy documents[38] including "Securing the Benefits", published in 2005 by the four UK Fisheries Administrations. "Securing the Benefits" sets out UK plans to achieve a sustainable and profitable future for UK fisheries and is the output of extensive stakeholder consultation.

106. At the early stages of drafting, Defra and other Administrations consulted key stakeholder organisations, including the Marine Fisheries Stakeholder Forum. These organisations include representatives from the fishing and aquaculture industries, processing and retail organisations and environmental NGOs. A public consultation on the draft NSP was undertaken for 9 weeks between December 2005 and February 2006 via Defra's website. This process was reinforced by targeted mailing and an article in Defra and MFA's newsletter, *Fishing Focus*, for marine fisheries stakeholders

107. The NSP will be implemented by Administrations and their delivery partners in conjunction with stakeholders. Progress will be reviewed by each Administration. At a UK level, the Marine Fisheries Stakeholder Forum will be involved in the implementation of the NSP.

[38] *Securing the Benefits* (2005), *A Strategy for the Sustainable Development of European Aquaculture* (2002), *A Sustainable Framework for Scottish Sea Fisheries* (2005), *DARD Corporate Plan 2005-2008, Development of the Welsh Fisheries and Aquaculture Sector* (2003), *Study into Sea and Inland Fisheries in Wales* (2000), *Welsh Strategy Document for Recreational Fisheries* (2003), *Charting a New Course* (2005), *Salmon and Freshwater Fisheries Review, Salmon and Freshwater Fisheries Review – Government Response* (2001), *Towards a National Development Strategy for Shellfish* (2005)

ANNEX TO SECTION 1

England

In 2007 around 28% by value of sea fish landings into the UK by UK vessels were made into England. The sector was worth €218.19 m, with demersal species and shellfish together accounting for 95% of landings by value and 86% by volume. All English regions have major ports, although the highest employment dependency on fishing is in the South West. Processing is a major employer, particularly in Humberside, where it employs over 5000 people. Total turnover of the processing industry in England in 2005 was €1570m. Aquaculture is relatively small sector in England, with a total turnover of €97 m in 2005; main species are rainbow trout and mussels.

Wales

The Welsh sea fish catching sector was worth €22.70 m in 2007, equivalent to 3% by value of landings into the UK. The sector is mainly inshore based, dominated by smaller inshore boats which take a wide range of high value species such as bass, crabs, scallops, lobsters and whelks. Shellfish gathering by hand is important at the Burry Inlet and Menai Straits. Aquaculture, notably in the form of mussel beds, is a growing industry, with a total turnover of around €5.2 m in 2005. Wales has the first major integrated land-based marine fish farm in Europe which uses state of the art re-circulation technology. Fishing tourism is a very important activity in Wales which has the potential to deliver significant economic benefits to rural communities; the sector is worth at least €175.6 m. Total turnover of the processing industry in Wales in 2005 was €10m.

Scotland

Landings into Scotland by UK vessels were valued at €509.0 m in 2007 - 65% by value of landings into the UK by UK vessels. In terms of species type, the split by value was 46% shellfish, 33% demersal and 22% pelagic. Declining stocks have led to a reduction in the importance of the demersal sector. In 2005, the fisheries industry as a whole contributed only 0.5% to Scottish GDP, comprising 0.3% from processing, 0.2% from catching and 0.1% from aquaculture. However, the industry's importance varies considerably around the coast and in a number of local areas direct employment in the industry accounted for between 10-20% of jobs. In 2006, 84% of the quantity of fish produced by UK aquaculture was produced in Scotland, mainly because of the concentration of farmed salmon production. In 2005, the total turnover of the aquaculture sector in Scotland was around €297.7 m. Total turnover of the processing industry in Scotland in 2005 was €1362m.

Northern Ireland

In 2007, landings into Northern Ireland by UK vessels were 4% of the total landings into the UK by UK vessels by value, worth €28.34 m, of which €17.1 m was accounted for by nephrops. There is also a small but profitable pelagic fleet and a small but declining whitefish fleet. Northern Ireland also has 691

licensed aquaculture sites, of these 74 are licensed for shellfish and 617 for the cultivation of finfish. Total turnover of the aquaculture sector in Northern Ireland in 2005 was €8.2 m and the industry directly employs 156 full time and 72 part time people. Since 1998, there has been significant development in shellfish aquaculture and increased production of bottom cultivated mussels and Pacific Oysters around the Northern Ireland coastline. Further increases in aquaculture production are planned. Total turnover of the processing industry in Northern Ireland in 2005 was €73m.

Statistical data

Summary details of UK vessels landings into the UK and abroad:

Table 1

	Quantity of landings - Tonnes Live weight of fish	2000	2001	2002	2003	2004	2005	2006	2007
(1)	**All species, All Areas** Of which:	**747322**	**738756**	**688430**	**641062**	**655140**	**715799**	**617943**	**609747**
(2)	Stocks fished unsustainably	195044	200394	202022	183935	175660	156652	104265	134722
(3)	Stocks at risk of being fished unsustainably	94460	101450	78226	97184	133951	219188	162279	111706
(4)	Stocks fished sustainably	106100	88164	96673	73098	78891	81001	72228	66473
(5)	Stocks where Fpa has not been set	56654	42104	37583	27948	29610	26113	31224	31935
(6)	Stocks where no assessment has been made	49390	43088	34497	27472	26001	31791	33991	38167
(7)	Other Species/areas inc. non-quota species	245675	263556	239430	231425	211026	201053	213957	226743
(A)	***(4)+(5)+(6)+(7)= all species NOT being fished unsustainably***	***457818***	***436912***	***408183***	***359944***	***345528***	***339958***	***351399***	***363319***
	As %'s of all species, all areas:								
	Stocks fished unsustainably	26%	27%	29%	29%	27%	22%	17%	22%
	Stocks at risk of being fished unsustainably	13%	14%	11%	15%	20%	31%	26%	18%
	Stocks fished sustainably	14%	12%	14%	11%	12%	11%	12%	11%
	Stocks where Fpa has not been set	8%	6%	5%	4%	5%	4%	5%	5%
	Stocks where no assessment has been made	7%	6%	5%	4%	4%	4%	6%	6%
	Other Species/areas inc. non-quota species	33%	36%	35%	36%	32%	28%	35%	37%
(B)	***(4)+(5)+(6)+(7)= all species NOT being fished unsustainably***	***61%***	***59%***	***59%***	***56%***	***53%***	***47%***	***57%***	***60%***
(C)	***Worst case - (4)+(7)***	***47%***	***48%***	***49%***	***48%***	***44%***	***39%***	***46%***	***48%***
	Value of landings - €million	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
(1)	**All species, All Areas** Of which:	**904.83**	**924.44**	**873.75**	**764.02**	**754.56**	**842.63**	**901.03**	**941.10**
(2)	Stocks fished unsustainably	107.81	140.16	155.86	125.61	130.48	161.81	128.24	138.87
(3)	Stocks at risk of being fished unsustainably	26.00	36.01	27.90	41.59	27.63	48.18	55.83	37.40
(4)	Stocks fished sustainably	211.38	163.02	155.43	117.66	128.90	136.06	143.54	138.25
(5)	Stocks where Fpa has not been set	16.64	20.03	13.79	10.61	9.21	10.53	15.62	15.13
(6)	Stocks where no assessment has been made	98.28	86.26	72.23	51.70	52.97	71.59	75.29	81.18
(7)	Other Species/areas inc. non-quota species	444.71	478.97	448.53	416.85	405.36	414.46	482.51	530.26
(D)	***(4)+(5)+(6)+(7)= all species NOT being fished unsustainably***	***771.01***	***748.27***	***689.98***	***596.83***	***596.44***	***632.64***	***716.96***	***764.83***
	As %'s of all species, all areas:								
	Stocks fished unsustainably	12%	15%	18%	16%	17%	19%	14%	15%
	Stocks at risk of being fished unsustainably	3%	4%	3%	5%	4%	6%	6%	4%
	Stocks fished sustainably	23%	18%	18%	15%	17%	16%	16%	15%
	Stocks where Fpa has not been set	2%	2%	2%	1%	1%	1%	2%	2%
	Stocks where no assessment has been made	11%	9%	8%	7%	7%	8%	8%	9%
	Other Species/areas inc. non-quota species	49%	52%	51%	55%	54%	49%	54%	56%
(E)	***(4)+(5)+(6)+(7)= all species NOT being fished unsustainably***	***85%***	***81%***	***79%***	***78%***	***79%***	***75%***	***80%***	***81%***
(F)	***Worst case - (4)+(7)***	***73%***	***69%***	***69%***	***70%***	***71%***	***65%***	***69%***	***71%***

Definition of stocks - derived from ACFM reports on the state of fish stocks - Reference ICES 2007a in UK SEA annex to OP

ICES (2007a). Report of the ICES Advisory Committee on Fishery Management, Advisory Committee on the Marine Environment and Advisory Committee on Ecosystems, 2007. ICES Advice. Books 1 - 10. 6, 310 pp

Fisheries compared to overall business activity in the UK - This is a comparison of key indicators from the UK Annual Business Inquiry conducted by the Office for National Statistics at the overall level and those for the fishing industry and its related activities.

Source: ONS – http://www.statistics.gov.uk/abi/downloads/sections_a-o.xls

Table 2

Total turnover of businesses - UK level - € million											**% change**
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	**00-06**
SIC Sections A-O - Agriculture, Fishing, Construction, {Production, Distribution and service industries	2511904	2643708	2823070	3241125	3286492	3294635	3147250	3383100	3596230	3817348	**+ 18%**
Of which:											
Fishing	--	--	--	1135	1087	1052	934	1051	919	936	**- 18%**
Fish Farming	--	--	--	406	470	535	455	457	683	744	**+ 83%**
Production of Fish Products	2458	2623	2615	3094	2992	3155	2864	2991	3248	3296	**+ 7%**

Table 3

Total Gross Value Added - UK level - € million											**% change**
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	**00-06**
UK national Gross Domestic Product at market prices: Current price	1182456	1288782	1385427	1574756	1614004	1679661	1616535	1745534	1805183	1912843	**+ 21%**
SIC Sections A-O - Agriculture, Fishing, Construction, {Production, Distribution and service industries	747934	801440	873652	994175	1015540	1015890	954943	1047499	1105176	1158826	**+ 17%**
Of which:											
Fishing	--	--	--	481	500	404	393	422	503	471	**- 2%**
Fish Farming	--	--	--	172	129	143	98	143	233	358	**+ 108%**
Production of Fish Products	501	528	574	719	716	708	698	750	786	621	**- 14%**

Table 4

Total Employment Average during year - UK level - Thousands											**% change**
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	**00-06**
SIC Sections A-O - Agriculture, Fishing, Construction, {Production, Distribution and service industries	--	21985	22549	23125	23509	23497	23448	23743	24045	23696	**+ 2%**
Of which:											
Fishing	--	--	--	9	10	8	9	8	9	7	**- 22%**
Fish Farming	--	--	--	3	4	4	4	3	3	3	**+ 0%**
Production of Fish Products	--	20	21	25	21	20	20	18	18	17	**- 32%**
NB - Employment in the ABI excludes those that are self-employed and so excludes a significant element of employment in the fish capture industry											

Table 5

Implies GVA per capita employed											**% change**
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	**00-06**
SIC Sections A-O - Agriculture, Fishing, Construction, {Production, Distribution and service industries	--	36454	38745	42991	43198	43235	40726	44118	45963	48904	**+ 14%**
Fisheries Sector:	--	--	--	37105	38425	39226	36052	45335	50714	53681	**+ 45%**
Of which:											
Fishing	--	--	--	53463	50031	50511	43689	52692	55915	67272	**+ 26%**
Fish Farming	--	--	--	57477	32174	35795	24575	47656	77534	119316	**+ 108%**
Production of Fish Products	--	26424	27346	28771	34089	35398	34911	41679	43643	36502	**+ 27%**

Details of UK trade in fish and fish products as part of overall UK trade in goods

Source: ONS – Balance of Payments data and HMRC data for trade in fish and fish products

Table 6

€ million	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	% change 97-06
Total trade in all goods											
Imports	249168	244230	252439	308628	304194	296741	272235	281334	309561	357407	**+ 43%**
Exports	267055	276703	296574	362782	370492	372635	342502	371084	410193	471180	**+ 76%**
Trade balance	-17887	-32473	-44134	-54153	-66298	-75894	-70266	-89750	-100631	-113773	**+ 536%**
Trade in Food, Beverages, tobacco											
Imports	16092	15209	15111	16271	15492	15898	15727	15591	15575	16049	**- 0%**
Exports	24509	25680	27022	29001	29737	30824	30628	32642	34663	36694	**+ 50%**
Trade balance	8418	10472	11911	12730	14245	14926	14901	17052	19088	20645	**+ 145%**
Trade in Fish & Fish Products											
Imports	1529	1587	1978	2176	2308	2289	2080	2173	2481	2815	**+ 84%**
Exports	877	528	1133	1143	1198	1212	1288	1306	1374	1385	**+ 58%**
Trade balance	-652	-1058	-845	-1033	-1110	-1077	-792	-867	-1107	-1430	**+ 119%**

Details of gender breakdown for employment in the Fishing sector – Data for Great Britain (i.e. excludes Northern Ireland)

Source: ONS – Breakdown of employment data from the Annual Business Inquiry

Table 7

Number of employees at GB enterprises	1998	1999	2000	2001	2002	2003	2004	2005	2006	% change 98-06
Fishing										
Male	7162	7025	4268	5094	3391	3788	2905	3875	3922	- 45%
Female	1654	1313	1180	967	593	757	520	629	539	- 67%
Total employment in GB	8816	8338	5448	6061	3984	4545	3425	4504	4461	- 49%
% male	*81%*	*84%*	*78%*	*84%*	*85%*	*83%*	*85%*	*86%*	*88%*	+ 7%
% female	*19%*	*16%*	*22%*	*16%*	*15%*	*17%*	*15%*	*14%*	*12%*	- 7%
Fish Farming										
Male	2891	2018	2533	3592	2188	1981	1652	1802	1809	- 37%
Female	789	432	551	593	409	424	243	356	232	- 71%
Total employment in GB	3680	2450	3084	4185	2597	2405	1895	2158	2041	- 45%
% male	*79%*	*82%*	*82%*	*86%*	*84%*	*82%*	*87%*	*84%*	*89%*	+ 10%
% female	*21%*	*18%*	*18%*	*14%*	*16%*	*18%*	*13%*	*16%*	*11%*	- 10%
Production of Fish Products										
Male	10773	12261	14637	10874	10756	11210	10899	10780	10317	- 4%
Female	9256	8207	10704	8315	7815	7452	6909	6820	5516	- 40%
Total employment in GB	20029	20468	25341	19189	18571	18662	17808	17600	15833	- 21%
% male	*54%*	*60%*	*58%*	*57%*	*58%*	*60%*	*61%*	*61%*	*65%*	+ 11%
% female	*46%*	*40%*	*42%*	*43%*	*42%*	*40%*	*39%*	*39%*	*35%*	- 11%
Total for Fisheries Sector										
Male	20826	21304	21438	19560	16335	16979	15456	16457	16048	- 23%
Female	11699	9952	12435	9875	8817	8633	7672	7805	6287	- 46%
Total employment in GB	32525	31256	33873	29435	25152	25612	23128	24262	22335	- 31%
% male	*64%*	*68%*	*63%*	*66%*	*65%*	*66%*	*67%*	*68%*	*72%*	+ 8%
% female	*36%*	*32%*	*37%*	*34%*	*35%*	*34%*	*33%*	*32%*	*28%*	- 8%
NB - Employment in the ABI excludes those that are self-employed and so excludes a significant element of employment in the fish capture industry										

Key Statistics for the UK Catching Sector

Source: MFA Stats Unit, 2008

Table 8

Numbers of vessels	as at 31st December:											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	97-07
England	4199	4089	3960	3826	3742	3734	3618	3511	4199	3368	3383	**- 19%**
Wales	469	469	458	437	445	460	451	438	469	426	443	**- 6%**
Scotland	2820	2768	2704	2656	2642	2521	2383	2389	2820	2261	2251	**- 20%**
Northern Ireland	354	345	345	341	339	321	313	317	354	330	329	**- 7%**
UK (including Islands and unassigned vessels)	8265	8080	7865	7651	7559	7422	7137	7039	8265	6759	6775	**- 18%**
Of Which - Over 10m vessels												
England	896	792	737	713	697	660	625	585	564	555	546	**- 39%**
Wales	74	67	57	50	51	52	51	46	43	41	42	**- 43%**
Scotland	1193	1126	1075	1032	1021	882	797	781	764	746	740	**- 38%**
Northern Ireland	183	176	175	176	173	151	149	141	143	139	141	**- 23%**
UK (including Islands and unassigned vessels)	2453	2259	2136	2061	2032	1833	1699	1636	1590	1553	1533	**- 38%**
Source - UK Fisheries Administrations												

Table 9

Tonnage of vessels (tonnes)	**as at 31st December:**											**% change**
	1997	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**97-07**
England	80426	76905	76320	73930	73354	71343	69113	65703	80426	65776	64588	**- 20%**
Wales	10655	10444	9657	8853	8989	8762	9103	8386	10655	7941	8031	**- 25%**
Scotland	154310	159738	161035	161909	161427	141553	132219	130485	154310	122600	122170	**- 21%**
Northern Ireland	16553	16027	16431	16449	16538	16005	16096	15084	16553	15503	15387	**- 7%**
UK (including Islands and unassigned vessels)	266610	267537	267572	265118	264287	240998	229292	223309	266610	215026	212844	**- 20%**
Source - UK Fisheries Administrations												

Table 10

Engine Power of vessels (KW)	**as at 31st December:**											**% change**
	1997	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**97-07**
England	403871	387798	372039	365125	362815	355473	343489	328622	403871	320459	316981	**- 22%**
Wales	47386	45334	41567	37700	38740	39449	39028	37331	47386	36005	36979	**- 22%**
Scotland	472179	477016	468897	476521	498899	454577	440640	442356	472179	416368	413879	**- 12%**
Northern Ireland	59340	56602	58397	62451	62679	59305	59002	57806	59340	58986	59506	**+ 0%**
UK (including Islands and unassigned vessels)	1018669	1002268	974882	975653	997292	942376	912692	901161	1018669	865451	859372	**- 16%**
Source - UK Fisheries Administrations												

Table 11

Average age of over 10m fishing fleet (Years)	as at 31st December:											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	97-07
England	22.6	23.1	23.6	24.0	24.4	24.8	25.2	25.4	25.9	26.3	26.7	**+ 18%**
Wales	22.9	25.2	26.0	26.2	26.6	27.1	26.6	27.1	27.7	27.9	27.9	**+ 22%**
Scotland	21.5	21.6	22.0	22.3	22.6	22.7	23.1	23.6	24.3	24.8	25.5	**+ 19%**
Northern Ireland	26.7	27.4	27.6	28.4	28.7	28.3	29.6	29.3	28.6	29.2	29.7	**+ 11%**
UK (including Islands and unassigned vessels)	22.3	22.7	23.2	23.5	23.9	24.2	24.6	24.8	25.2	25.8	26.4	**+ 18%**
Source - UK Fisheries Administrations												

Table 12

Employment in fishing industry (full and part time)	as at 31st December:											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006		97-06
England	7733	7457	7,166	6,913	6,645	6,518	6,347	6,383	5,976	5,957		**- 23%**
Wales	1696	1654	1,465	1,148	1,117	1,369	1,001	1,176	1,131	1,159		**- 32%**
Scotland	8194	7771	7330	6,902	6,637	5,707	5276	5,275	5,155	5,205		**- 36%**
Northern Ireland	981	1007	935	686	559	611	498	619	569	613		**- 38%**
UK	18604	17889	8,631	15,649	14,958	14,205	7,348	13,453	12,831	12,934		**- 30%**
Source - UK Fisheries Administrations												

Table 13

Estimate of GVA for the fishing industry (€mn)												% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	00-05
England	--	--	--	163	190	119	155	106	176	--	--	**+ 8%**
Wales	--	--	--	--	16	--	13	10	16	--	--	**n/a**
Scotland	--	--	--	475	272	290	218	224	312	--	--	**- 34%**
Northern Ireland	--	--	--	--	53	--	17	19	15	--	--	**n/a**
UK	--	--	--	659	531	445	402	360	519	--	--	**- 21%**
Source - ABI - Combines Capture and aquaculture together - Also methodology for the regional estimates results in differences from the National totals given in table EFF1												

Table 14

Estimate of value of landings of fish into the UK by UK vessels (€mn)												% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007 (p)	97-07
England	223.923	237.074	225.621	214.037	213.319	195.503	192.856	177.457	176.724	199.059	221.270	- 1%
Wales	19.609	19.279	17.427	20.860	25.781	26.178	16.641	15.388	23.327	21.256	22.701	+ 16%
Scotland	403.882	434.787	428.484	429.494	412.971	413.072	341.722	383.952	451.713	474.825	508.1082	+ 26%
Northern Ireland	31.386	29.759	32.660	28.305	30.457	28.094	22.590	21.152	21.533	29.887	28.808	- 8%
UK	678.801	720.899	704.191	692.696	682.527	662.847	573.809	597.949	673.297	725.028	780.886	+ 15%
Source - UK Fisheries Administrations												

Landings by UK Registered vessels into the UK and abroad by nationality of vessel

(Source: MFA Stats Unit, 2008)

Table 15

		Tonnes (000s)				
		England	Wales	Scotland	Northern Ireland	UK
Demersal Species	2003	57.9	6.4	129.8	8.2	202.7
	2004	58.5	6.0	159.7	6.3	231.1
	2005	60.2	3.5	204.3	8.5	276.8
	2006	65.7	1.7	166.2	2.7	236.6
	2007	66.7	1.9	132.8	2.8	204.5
	% Change 03-07	***15%***	***-70%***	***2%***	***-66%***	***1%***
Pelagic Species	2003	60.8	--	212.2	19.9	292.9
	2004	58.2	--	212.8	2.0	290.9
	2005	56.0	--	223.5	18.6	298.1
	2006	64.6	--	153.7	21.4	239.7
	2007	67.1	0.2	169.9	22.9	260.1
	% Change 03-07	***10%***	***--***	***-20%***	***15%***	***-11%***
Shellfish Species	2003	70.5	11.5	52.9	6.9	144.0
	2004	58.5	8.4	54.8	7.9	131.7
	2005	57.6	10.4	55.3	8.1	132.8
	2006	54.5	11.5	59.3	11.3	137.9
	2007	55.6	7.6	66.9	13.7	145.8
	% Change 03-07	***-21%***	***-34%***	***26%***	***99%***	***1%***
Total All Species	2003	189.2	17.9	394.9	35.0	639.6
	2004	175.2	14.4	427.3	34.1	653.7
	2005	173.8	13.9	483.1	35.2	707.8
	2006	184.9	13.3	379.2	35.3	614.2
	2007	189.3	9.8	369.5	39.4	610.4
	% Change 03-07	***0%***	***-45%***	***-6%***	***13%***	***-5%***

UK totals includes landings by vessels registered in the Island administrations of the UK (Jersey, Guernsey, Isle of Man)

Table 16

		Value (€million)				
		England	Wales	Scotland	Northern Ireland	UK
Demersal Species	2003	134.0	10.6	158.9	12.3	317.9
	2004	135.2	13.1	169.5	9.4	329.4
	2005	141.0	7.0	188.7	7.2	345.4
	2006	132.8	5.6	209.3	6.3	354.9
	2007	138.1	5.3	196.0	5.6	345.9
	% Change 03-07	***3%***	***-50%***	***23%***	***-55%***	***9%***
Pelagic Species	2003	46.4	--	109.1	9.8	165.5
	2004	24.3	--	120.4	0.7	155.9
	2005	25.6	--	158.4	15.4	199.4
	2006	42.4	0.1	125.1	14.8	182.5
	2007	48.7	0.6	126.2	11.5	187.0
	% Change 03-07	***5%***	***--***	***16%***	***17%***	***13%***
Shellfish Species	2003	97.6	26.3	139.8	13.7	280.3
	2004	84.5	14.7	152.8	15.9	270.8
	2005	85.9	21.9	163.6	17.4	291.0
	2006	107.2	14.4	206.1	27.4	357.9
	2007	117.5	18.7	237.9	32.9	409.8
	% Change 03-07	***20%***	***-29%***	***70%***	***140%***	***46%***
Total All Species	2003	278.0	37.0	407.8	35.9	763.7
	2004	243.9	27.9	442.6	36.4	756.1
	2005	252.6	29.0	510.8	39.9	835.8
	2006	282.4	20.1	540.6	48.7	895.3
	2007	304.4	24.6	560.1	50.1	942.6
	% Change 03-07	***9%***	***-34%***	***37%***	***40%***	***23%***

UK totals includes landings by vessels registered in the Island administrations of the UK (Jersey, Guernsey, Isle of Man)

Information on the UK Aquaculture Industry

This is a comparison of key indicators from the UK Annual Business Inquiry conducted by the Office for National Statistics for Aquaculture

Source: Office for National Statistics – http://www.statistics.gov.uk/abi/downloads/section_b.xls

Table 17

	Units	2000	2001	2002	2003	2004	2005	2006	% change 00-06
Number of enterprises	**Number**	**404**	**429**	**436**	**438**	**425**	**442**	**431**	**+ 7%**
Total turnover	**€ million**	**406**	**470**	**535**	**455**	**457**	**683**	**744**	**+ 83%**
Approximate gross value added at basic prices	€ million	172	129	143	98	143	233	358	**+ 108%**
Total purchases of goods, materials and services	€ million	256	404	436	351	314	480	471	**+ 84%**
Total employment - point in time	Thousand	2	4	4	4	3	3	3	**+ 50%**
Total employment - average during the year	Thousand	3	4	4	4	3	3	3	**+ 0%**
Total employment costs	€ million	44	64	75	81	69	83	78	**+ 75%**
Total net capital expenditure	€ million	53	19	21	35	19	23	45	**- 13%**
Total net capital expenditure- acquisitions	€ million	54	32	22	36	19	28	47	**- 13%**
Total net capital expenditure - disposals	€ million	--	13	2	1	--	3	1	**n/a**
Total stocks and work in progress - value at end of year	€ million	192	253	272	218	214	279	330	**+ 72%**
Total stocks and work in progress - value at beginning of year	€ million	187	195	231	226	212	255	245	**+ 31%**
Total stocks and work in progress - increase during year	€ million	5	58	40	-7	3	25	84	**+ 1597%**

Table 18

Number of sites involved in aquaculture in 2006:	Number of Units for fish:				Number of sites for Crustacean	Number of sites for Molluscs	Total Number of sites
	Ponds & Tanks	Enclosures/	Other sites	Total			
England and Wales	6264	145	1225	7634	35	29385	37054
Scotland	126	0	354	480	7	323	810
Northern Ireland	350	0	267	617	0	74	691
UK	6740	145	1846	8731	42	29782	38555

Table 19

Production of fish from Aquaculture in 2006	**Fish:**						
tonnes of fish	Rainbow trout	Brown Trout	Halibut	Cod	Salmon	Other Fish	total Fish
England and Wales	4890	207	0	0	0	120	5217
Scotland	7492	267	233	542	131847	10	140390
Northern Ireland	599	0	0	0	126	0	725
UK	12981	474	233	542	131973	130	146332
	Molluscs:						
tonnes of fish	Clams	Oysters	Scallops	Mussels	Other or not specified	Total Molluscs	Total all fish
England and Wales	4	455	0	10492	0	10951	16167
Scotland	0	335	70	4219	0	4624	145015
Northern Ireland	0	0	0	0	9999	9999	10724
UK	4	790		14711	9999	25574	171906

Information on the UK Fish Processing Industry

Source: Office for National Statistics – Regional Analysis of UK Annual Business Inquiry Results

Table 20

Overall results for the UK:	Units	**1997**	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**
Number of enterprises	**Number**	**395**	**393**	**391**	**388**	**367**	**393**	**399**	**392**	**386**	**388**
Total turnover	**€ million**	**2458**	**2623**	**2615**	**3094**	**2992**	**3155**	**2864**	**2991**	**3248**	**3296**
Approximate gross value added at basic prices	€ million	501	528	574	719	716	708	698	750	786	621
Total purchases of goods, materials and services	€ million	1967	2101	2055	2365	2297	2507	2179	2268	2491	2636
Total employment - point in time	Thousand	--	20	22	25	21	20	20	18	19	17
Total employment - average during the year	Thousand	--	20	21	25	21	20	20	18	18	17
Total employment costs	€ million	346	380	406	448	409	445	432	432	415	430
Total net capital expenditure	€ million	59	67	71	87	82	105	84	71	67	104
Total net capital expenditure- acquisitions	€ million	75	73	76	97	88	116	90	100	*	116
Total net capital expenditure - disposals	€ million	17	6	5	10	6	13	6	29	*	12
Total stocks and work in progress - value at end of year	€ million	220	263	266	243	254	340	308	280	331	324
Total stocks and work in progress - value at beginning of year	€ million	209	275	261	256	230	280	295	249	303	361
Total stocks and work in progress - increase during year	€ million	12	-12	3	-13	24	60	12	31	29	-35

In some cases data has had to be suppressed to preserve confidentiality (indicated with *)

Table 21

Overall results for England:	Units	**1997**	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**% change 98-05**
Total turnover	**€ million**	**--**	**1264**	**1389**	**1785**	**1594**	*****	**1430**	**1539**	**1570**	**+ 24%**
Approximate gross value added at basic prices	€ million	--	286	325	458	394	371	340	389	430	**+ 50%**
Total purchases of goods, materials and services	€ million	--	977	1065	1312	1203	1209	1096	1167	1144	**+ 17%**
Total employment costs	€ million	--	180	204	263	219	234	210	220	205	**+ 14%**
Total net capital expenditure	€ million	--	31	35	38	37	40	36	40	37	**+ 17%**

Note - The methodology used to produce the results at a regional level requires the splitting of information on establishments that may have sites in each region - as such the sum of the results from the regions cannot be summed to the overall position for the UK. In addition in some cases data at the regional level has had to be suppressed to preserve confidentiality (indicated with *)

Table 22

Overall results for Wales:	Units	1997	1998	1999	2000	2001	2002	2003	2004	2005	% change 98-05
Total turnover	**€ million**	**--**	**36**	**44**	**48**	*****	*****	*****	*****	**10**	**- 71%**
Approximate gross value added at basic prices	€ million	--	10	*	10	*	*	*	*	3	**- 72%**
Total purchases of goods, materials and services	€ million	--	25	26	*	*	*	*	*	9	**- 65%**
Total employment costs	€ million	--	7	8	11	*	*	*	*	1	**- 80%**
Total net capital expenditure	€ million	--	*	*	2	*	*	*	*	-	**n/a**

Note - The methodology used to produce the results at a regional level requires the splitting of information on establishments that may have sites in each region - as such the sum of the results from the regions cannot be summed to the overall position for the UK. In addition in some cases data at the regional level has had to be suppressed to preserve confidentiality (indicated with *)

Table 23

Overall results for Scotland:	Units	1997	1998	1999	2000	2001	2002	2003	2004	2005	% change 98-05
Total turnover	**€ million**	**--**	**1178**	**1133**	**1163**	*****	*****	**1100**	**1284**	**1362**	**+ 16%**
Approximate gross value added at basic prices	€ million	--	322	*	305	*	*	330	396	432	**+ 34%**
Total purchases of goods, materials and services	€ million	--	860	811	*	*	*	802	908	939	**+ 9%**
Total employment costs	€ million	--	205	196	202	*	*	210	214	215	**+ 5%**
Total net capital expenditure	€ million	--	*	*	51	*	*	43	24	34	**n/a**

Note - The methodology used to produce the results at a regional level requires the splitting of information on establishments that may have sites in each region - as such the sum of the results from the regions cannot be summed to the overall position for the UK. In addition in some cases data at the regional level has had to be suppressed to preserve confidentiality (indicated with *)

Table 24

Overall results for Northern Ireland:	Units	1997	1998	1999	2000	2001	2002	2003	2004	2005	% change 98-05
Total turnover	**€ million**	**--**	**71**	**77**	**89**	*****	*****	*****	*****	**73**	**+ 2%**
Approximate gross value added at basic prices	€ million	--	31	21	23	*	*	*	*	22	**- 30%**
Total purchases of goods, materials and services	€ million	--	46	58	61	*	*	*	*	50	**+ 8%**
Total employment costs	€ million	--	12	14	16	*	*	*	*	12	**- 2%**
Total net capital expenditure	€ million	--	7	5	5	*	*	*	*	3	**- 61%**

Note - The methodology used to produce the results at a regional level requires the splitting of information on establishments that may have sites in each region - as such the sum of the results from the regions cannot be summed to the overall position for the UK. In addition in some cases data at the regional level has had to be suppressed to preserve confidentiality (indicated with *)

Details of Gross Value Added and Gross Value Added per head for UK Convergence and non-Convergence Areas

Source: Office for National Statistics – http://www.statistics.gov.uk/pdfdir/gva1207.pdf

Table 25

GVA (€ million - current basic prices)											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
UK (inc. data not allocated to regions)	1,051,193	1,144,206	1,224,458	1,390,423	1,430,236	1,491,187	1,436,214	1,550,446	1,604,259	1,694,325	+ 61%
Of which:											
England	876,586	961,001	1,029,256	1,160,183	1,198,005	1,252,242	1,208,114	1,305,214	1,348,563	1,420,993	+ 62%
Wales	41,554	44,344	46,694	52,383	53,932	56,082	53,866	57,983	59,556	106,646	+ 157%
Scotland	87,857	94,053	98,914	110,333	112,599	117,232	112,852	121,653	126,279	133,532	+ 52%
Northern Ireland	23,786	26,091	27,918	31,547	32,415	33,670	32,477	35,275	36,597	38,771	+ 63%
of which - Convergence Areas:											
Cornwall and Scilly Isles	4,996	5,379	5,767	6,600	6,896	7,412	7,255	7,996	8,480	8,806	+ 76%
West Wales & Valleys	22,608	23,876	24,857	27,277	27,523	28,415	27,105	29,095	30,756	31,970	+ 41%
Highlands and Islands	4,516	4,774	5,068	5,707	5,827	6,045	5,842	6,472	6,931	7,295	+ 62%
UK Convergence Areas	**32,119**	**34,029**	**35,692**	**39,584**	**40,246**	**41,872**	**40,202**	**43,563**	**46,168**	**48,072**	**+ 50%**
UK Non-Convergence Areas	**997,663**	**1,091,460**	**1,167,090**	**1,314,862**	**1,356,705**	**1,417,353**	**1,367,107**	**1,476,562**	**1,524,827**	**1,651,871**	**+ 66%**

Table 26

GVA per capita (€ - current basic prices)											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
UK (inc. data not allocated to regions)	18,026	19,567	20,865	23,612	24,195	25,136	24,115	25,907	26,632	27,965	+ 55%
Of which:											
England	18,013	19,684	20,991	23,566	24,227	25,221	24,227	26,047	26,723	27,993	+ 55%
Wales	14,354	15,293	16,097	18,020	18,532	19,209	18,376	19,680	20,165	21,119	+ 47%
Scotland	17,283	18,525	19,502	21,792	22,234	23,192	22,314	23,955	24,786	26,096	+ 51%
Northern Ireland	14,232	15,551	16,628	18,746	19,189	19,845	19,075	20,624	21,224	22,262	+ 56%
of which - Convergence Areas:											
Cornwall and Scilly Isles	10,387	11,088	11,818	13,400	13,864	14,762	14,285	15,594	16,402	16,885	+ 63%
West Wales & Valleys	12,180	12,870	13,411	14,726	14,853	15,320	14,573	15,660	16,393	17,014	+ 40%
Highlands and Islands	12,105	12,824	13,632	15,363	15,748	16,364	15,899	17,547	18,631	19,476	+ 61%
UK Convergence Areas	**11,851**	**12,545**	**13,155**	**14,572**	**14,794**	**15,359**	**14,698**	**15,902**	**16,696**	**17,322**	**+ 46%**
UK Non-Convergence Areas	**17,943**	**19,573**	**20,851**	**23,409**	**24,058**	**25,043**	**24,059**	**25,857**	**26,532**	**27,579**	**+ 54%**

Details of Fatalities and accidents involving UK fishing vessels

Source: UK Marine Accident Investigation Branch of the Marine and Coastguard Agency.

Table 27

Number of fatalities involving UK fishing vessels											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
0-10m vessels	4	9	2	3	2	2	4	5	3	1	**- 75%**
10-12m vessels	4	3	2	1	0	4	2	4	0	2	**- 50%**
12-15m vessels	1	0	0	0	0	0	0	0	0	1	**+ 0%**
15-24m vessels	7	0	2	2	3	4	2	1	4	10	**+ 43%**
24m and over vessels	4	14	3	19	5	1	1	0	2	3	**- 25%**
Total fatalities involving UK fleet	**20**	**26**	**9**	**25**	**10**	**11**	**9**	**10**	**9**	**17**	**- 15%**

Table 28

Details of fishing vessel losses - number of vessels											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
0-15m vessels	12	12	17	15	16	7	16	16	20	11	**- 8%**
15-24m vessels	10	5	10	18	17	6	8	9	11	7	**- 30%**
24m and over vessels	1	4	6	7	1	5	4	0	3	1	**+ 0%**
Total losses from UK fleet	**23**	**21**	**33**	**40**	**34**	**18**	**28**	**25**	**34**	**19**	**- 17%**
UK registered fleet	8265	8080	7865	7651	7559	7422	7137	7039	8265	6759	**- 18%**
Losses as % fleet	0.3%	0.3%	0.4%	0.5%	0.4%	0.2%	0.4%	0.4%	0.4%	0.3%	

Table 29

Number of incidents of all types involving UK fishing vessels - all lengths											% change
Nature of incident	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
Capsize/Listing	8	11	15	4	3	5	4	2	6	5	**- 38%**
Collision/Contact	25	20	22	27	23	16	24	15	26	15	**- 40%**
Fire/Explosion	17	11	15	16	10	13	13	19	16	15	**- 12%**
Flooding/Foundering	51	62	54	59	46	40	50	40	54	34	**- 33%**
Grounding	44	40	31	40	29	26	38	29	19	24	**- 45%**
Heavy Weather Damage	1	2	4	4	0	2	1	2	3	1	**+ 0%**
Machinery Failure	316	247	232	174	212	181	221	202	232	240	**- 24%**
Missing Vessel	0	1	0	1	0	0	1	1	0	1	**--**
Person Overboard	15	9	8	11	11	3	2	7	10	11	**- 27%**
Other	1	1	0	1	0	0	1	1	1	0	**- 100%**
Total number of incidents	**478**	**404**	**381**	**337**	**334**	**286**	**355**	**318**	**367**	**346**	**- 28%**

Table 30

Number of incidents of all types involving UK fishing vessels - all lengths - Incidents per 1000 vessels											% change
Nature of incident	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
Capsize/Listing	1.0	1.4	1.9	0.5	0.4	0.7	0.6	0.3	0.7	0.7	**- 24%**
Collision/Contact	3.0	2.5	2.8	3.5	3.0	2.2	3.4	2.1	3.1	2.2	**- 27%**
Fire/Explosion	2.1	1.4	1.9	2.1	1.3	1.8	1.8	2.7	1.9	2.2	**+ 8%**
Flooding/Foundering	6.2	7.7	6.9	7.7	6.1	5.4	7.0	5.7	6.5	5.0	**- 18%**
Grounding	5.3	5.0	3.9	5.2	3.8	3.5	5.3	4.1	2.3	3.6	**- 33%**
Heavy Weather Damage	0.1	0.2	0.5	0.5	0.0	0.3	0.1	0.3	0.4	0.1	**+ 22%**
Machinery Failure	38.2	30.6	29.5	22.7	28.0	24.4	31.0	28.7	28.1	35.5	**- 7%**
Missing Vessel	0.0	0.1	0.0	0.1	0.0	0.0	0.1	0.1	0.0	0.1	**--**
Person Overboard	1.8	1.1	1.0	1.4	1.5	0.4	0.3	1.0	1.2	1.6	**- 10%**
Other	0.1	0.1	0.0	0.1	0.0	0.0	0.1	0.1	0.1	0.0	**- 100%**
Total number of incidents	**57.8**	**50.0**	**48.4**	**44.0**	**44.2**	**38.5**	**49.7**	**45.2**	**44.4**	**51.2**	**- 11%**

Information on UK consumption and expenditure on fish and fish products:

Source: National Food Survey, Family expenditure Survey, General Household Survey

Table 31

Average consumption per head in the UK of fish consumed at home

Description	Units	1997	1998	1999	2000	2001-02	2002-03	2003-04	2004-05	2005-06	2006	% change 97-06
Fish	**g**	**149**	**148**	**146**	**144**	**157**	**155**	**156**	**158**	**167**	**170**	**+ 14%**
White fish, fresh, chilled or frozen	g	37	36	33	32	36	33	27	26	26	28	**- 25%**
Herrings and other blue fish, fresh, chilled or frozen	g	5	5	6	5	6	6	8	6	8	7	**+ 57%**
Salmon, fresh, chilled or frozen	g	8	9	8	8	9	9	10	10	12	12	**+ 56%**
Blue fish, dried or salted or smoked	g	4	4	4	5	5	5	5	6	6	6	**+ 51%**
White fish, dried, salted or smoked	g	6	5	6	5	4	4	4	4	4	4	**- 27%**
Shellfish	g	7	5	5	6	10	11	11	11	12	13	**+ 104%**
Takeaway fish	g	11	11	11	7	12	11	11	11	10	10	**- 4%**
Salmon, tinned	g	8	7	5	7	6	6	6	6	6	5	**- 34%**
Other tinned or bottled fish	g	23	24	27	27	29	29	28	30	33	31	**+ 31%**
Ready meals and other fish products - frozen or not frozen	g	28	28	26	28	36	38	43	45	49	50	**+ 82%**
Takeaway fish meals and fish products	g	14	15	14	14	3	3	2	2	3	3	**- 80%**

Table 32

Average consumption per head in the UK of fish consumed outside the home

Description	Units	1997	1998	1999	2000	2001-02	2002-03	2003-04	2004-05	2005-06	2006	% change 01/02-06
Fish and fish products	**g**	--	--	--	--	**15**	**14**	**14**	**14**	**14**	**14**	**- 2%**
White fish	g	--	--	--	--	9	9	8	8	9	9	**- 5%**
Fatty fish	g	--	--	--	--	1	1	1	1	1	1	**- 16%**
Shellfish - without sauce or dressing e.g. prawns, shrimps, oysters, crab	g	--	--	--	--	1	1	1	1	1	1	**- 1%**
Kippers and other smoked fish e.g. smoked salmon	g	--	--	--	--	0	0	0	0	0	0	**- 3%**
Other fish products and unspecified 'fish' e.g. squid, sushi, crabsticks	g	--	--	--	--	1	0	1	1	0	1	**+ 19%**
Processed fish	g	--	--	--	--	3	3	3	3	4	3	**+ 6%**

Table 33

Average Expenditure per head in the UK on Fish for consumption in or outside the home

Description	Units	1997	1998	1999	2000	2001-02	2002-03	2003-04	2004-05	2005-06	2006	% change 97-06
Fish	**c**	**112**	**118**	**125**	**133**	**149**	**148**	**136**	**146**	**153**	**163**	**+ 46%**
White fish, fresh, chilled or frozen	c	27	28	29	32	33	32	24	24	23	25	**- 8%**
Herrings and other blue fish, fresh, chilled or frozen	c	4	4	4	4	6	5	6	5	6	6	**+ 74%**
Salmon, fresh, chilled or frozen	c	6	7	8	11	11	11	11	12	14	16	**+ 146%**
Blue fish, dried or salted or smoked	c	4	4	5	6	7	7	6	7	8	9	**+ 100%**
White fish, dried, salted or smoked	c	4	4	5	5	4	4	4	5	5	5	**+ 10%**
Shellfish	c	8	7	8	10	14	14	14	14	15	18	**+ 122%**
Takeaway fish	c	12	13	15	11	21	20	18	20	18	19	**+ 68%**
Salmon, tinned	c	5	5	5	6	5	5	5	5	4	5	**- 11%**
Other tinned or bottled fish	c	10	11	12	12	15	15	13	14	15	15	**+ 52%**
Ready meals and other fish products - frozen or not frozen	c	16	17	17	20	25	28	30	33	37	39	**+ 145%**
Takeaway fish meals and fish products	c	16	17	17	16	8	8	6	6	8	7	**- 55%**