Department for Environment Food & Rural Affairs

Outcomes of annual negotiations for UK fishing opportunities in 2021 and 2022

March 2022

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Executive Summary

The UK participates in fisheries negotiations each year to agree Total Allowable Catches (TACs) and quotas for fish stocks shared with other coastal States.

In June 2021, negotiations concluded setting fishing opportunities for the 2021 fishing year, and, in February 2022, negotiations concluded setting fishing opportunities for the 2022 fishing year. This report summarises the outcomes of negotiations for each year.

The outcomes from 3 main negotiation forums are presented:

- UK-EU bilateral negotiations
- UK-EU-Norway trilateral negotiations
- Coastal States negotiations

An assessment of the sustainability of these outcomes is provided in the report "Assessing the sustainability of negotiated fisheries catch limits for the UK for 2020, 2021 and 2022".

UK quota from other sources, including agreements with Norway and the Faroe Islands, is assessed in the section "Other UK Quota" in order to provide a full overview of the fishing opportunities available to the UK fleet. A full TAC list and data table is provided in Annex 2.

Methodology and Caveats

UK quota is the UK's share of each Total Allowable Catch (TAC). The UK quota presented in this report is in line with the Secretary of State's determination of fishing opportunities for British fishing boats[1]. This means that the figures:

- cover both allocated and unallocated quota
- are pre-TAC deductions made for discard exemptions[2]
- account for the quota transfers agreed with third countries, such as Norway
- do not account for any adjustments such as banking/borrowing, or in-year quota exchanges[3]

[1] Fishing opportunities for British fishing boats - GOV.UK (www.gov.uk)

[2] For example, see 2021 deductions here: Fishing quota allocations for 2021 for England and the UK - GOV.UK (www.gov.uk). An estimate of UK quota pre-landing obligation deductions is used for 2020.

[3] UK and England quota management rules - GOV.UK (www.gov.uk)

This report only covers fish stocks subject to quota management and therefore does not include non-quota stocks. Nor does it deal with access arrangements.

This report summarises the “fishing opportunities” available to the UK fleet as a result of agreements made in annual negotiations. It does not attempt to predict how much of each of the quotas will be utilised, as fishing quota uptake often varies each year and depends on a wide range of factors that are difficult to accurately forecast, such as weather and fishing capacity. However, an estimate using UK average historic uptake is provided in the summary section for context.

Estimated value is included to provide context to the quota tonnages. The average UK landing price for each quota in 2019 is used to estimate the potential value of the available fishing opportunities. Where UK stock-specific values are not available, UK species level values or EU vessel landings have been used as an alternative[4]. 2020 was the most recent full year of price data available at the time of analysis, however, due the exceptional impact of coronavirus (COVID-19) on the market, 2019 prices have been used consistently throughout this report. Prices are nominal and in pound sterling at the first point of sale. Consistent prices are applied across all of the years to allow for a direct year-on-year comparison of negotiated outcomes, avoiding accounting for value fluctuations due to other factors external to the negotiations. This means that, for example, 100 tonnes of mackerel quota for the UK in 2019 is assumed to have the same potential economic value as 100 tonnes in 2020. This analysis is limited to estimating the potential value of the agreed quota and does not assess any wider economic benefits.

Comparisons are drawn against the outcomes of negotiations for 2020 fishing opportunities. In 2020, as an EU Member State, the UK’s quota shares were mainly based on the EU’s relative stability sharing mechanism[5]. The UK also participated in the EU’s quota transfer deals with countries such as Norway, the Faroe Islands and Greenland. In both 2021 and 2022, the UK’s quota shares were based on the new quota sharing arrangement agreed in the UK-EU Trade and Cooperation Agreement (UK-EU TCA)[6], and the UK was independent from the EU’s quota transfer deals.

Estimates of the quota that the UK might have expected to receive in 2021 and 2022 had the UK remained as an EU Member State are also provided. These are based on the

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[4] UK sea fisheries annual statistics report 2020 - GOV.UK (www.gov.uk). Average £ per tonne is calculated for each UK quota using live weight landing tonnage and landed value at the first point of sale; see data table “UK fleet landings by rectangle stock and estimated EEZ 2016 2020”. EU vessel landings are taken from the STECF Fisheries Dependent Information publication.

[5] Relative Stability is the mechanism by which TACs are shared between EU Member States under the Common Fisheries Policy. Each Member State receives a set percentage of the EU’s total quota in each stock.

[6] UK/EU and EAEC: Trade and Cooperation Agreement [TS No.8/2021] - GOV.UK (www.gov.uk)

shares of the TAC that the UK received in 2020, which take into account invocations of the Hague Preference[7], and the EU's quota transfer deals in that year.

The "Quota allocations" section provides an assessment of the final quota allocated in 2021, following deductions made for discard exemptions. This assessment is not yet available for 2022 as quota allocations have not yet been finalised[8].

This report is categorised in terms of the negotiation forum where each TAC is set. This means that there are some minor differences between this and the categorisation in the Secretary of State's determination[9]. There is also a minor difference between the stock lists used here and in sustainability reporting because the latter combines the two TACs agreed for mackerel, and the two TACs agreed for North Sea herring.

All figures are shown rounded. This means that there may be some instances where figures do not sum precisely to the overall totals shown.

[7] The Hague Preference is a mechanism under the Common Fisheries Policy designed to adjust fishing quota allocations for the UK and the Republic of Ireland when certain TACs fell below determined trigger levels.

[8] Fishing quota allocations are routinely finalised in the Spring.

[9] For example, Atlanto-Scandian herring is included under "stocks which are present in the waters of only one of the United Kingdom and the European Union" in the determination. However, because in practice this TAC is set at coastal States negotiations, it is included in the "Coastal States" total here.

Negotiated outcomes

Summary

The UK agrees TACs and other fisheries management measures across a number of negotiation forums. The UK-EU bilateral, UK-EU-Norway trilateral, and Coastal States negotiations together involved 87 TACs of direct interest to the UK in 2021 and 86 TACs in 2022[10].

For the 2021 fishing year, these negotiations provided the UK with approximately 620,000 tonnes in quota, estimated to be worth around £800 million.

For the 2022 fishing year, these negotiations provided the UK with approximately 596,000 tonnes in quota, estimated to be worth around £770 million[11].

Across these three negotiations, there was an increase in UK quota available between 2020 and 2021 (+8% in tonnage and +6% in value), and a relatively smaller decrease between 2021 and 2022 (-4% in tonnage and -3% in value).

Table 1: UK quota from UK-EU, trilateral, and coastal States negotiations

	2020	2021	2022
UK quota (t)	573,000	620,000	596,000
Difference from previous year (t)		+47,000	-25,000
UK quota value (£)	£755 million	£800 million	£770 million
Difference from previous year (£)		+£45 million	-£30 million

For each individual UK quota, there are several reasons why the tonnage available may change between years, primarily:

a) A change agreed for the overall Total Allowable Catch (TAC)
b) A change in the UK's share of the TAC, for example, in accordance with the quota share uplifts agreed in the UK-EU Trade & Cooperation Agreement (TCA)
c) A quota transfer agreement with a third country, for example, Norway or the Faroe Islands

[10] "TACs of direct interest" refers to TACs where the UK holds a share. The difference between years is due to the TAC for sandeels, which is set mid-year and therefore has not yet been agreed for 2022 fishing opportunities. This TAC was exceptionally set within the 2021 annual negotiations due to the late conclusion of negotiations for that year.

[11] These figures are net of quota transfers agreed with Norway and the Faroe Islands.

The following bar charts illustrate the pattern of change in tonnes and value across each of the three main negotiation forums in 2020, 2021 and 2022. They show that the quota available from the UK-EU negotiations increased in 2021, and then decreased slightly in 2022. Quota from the UK-EU-Norway negotiations increased in 2021, and again in 2022. Whereas quota from the coastal States negotiations increased in 2021, and then decreased back down to a lower level in 2022. The coastal States negotiations provided the largest quota tonnage for the UK across all three years (due to the high-tonnage pelagic TACs negotiated here, such as mackerel), whereas the UK-EU negotiations provided the highest estimated value.

A more detailed break-down of the data and explanation of these patterns for each negotiation forum is provided in the sections below.

Figure 1: Total UK quota (tonnes) across the three main negotiation forums in 2020, 2021, and 2022

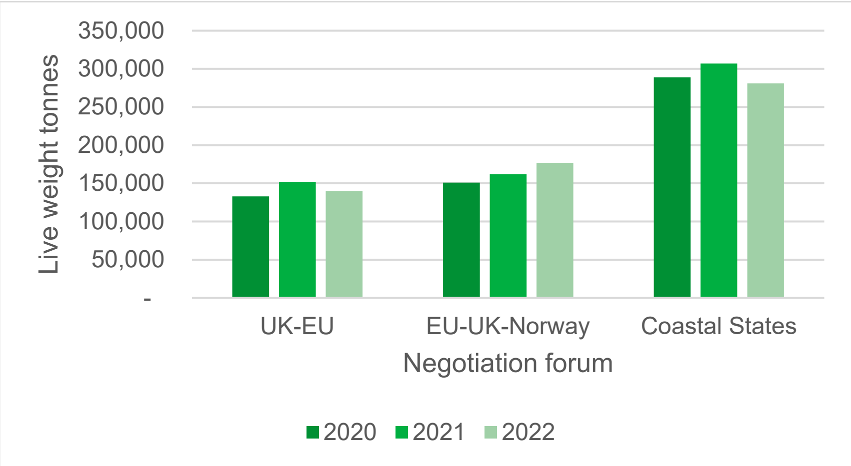
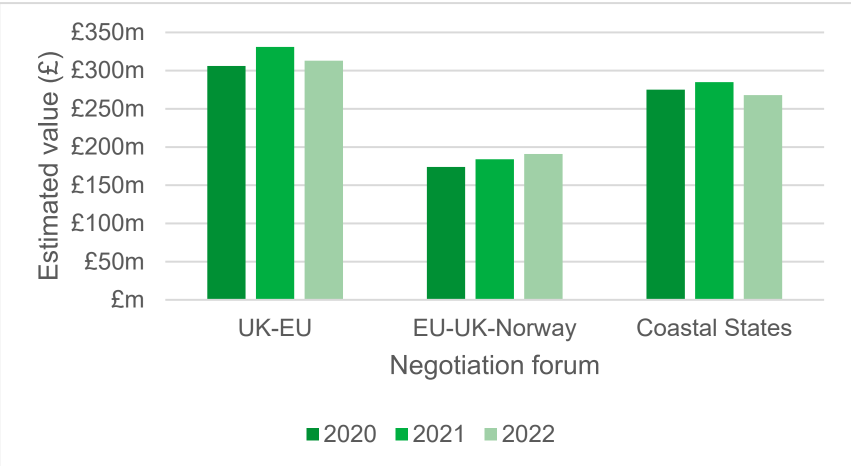


Figure 2: Total UK quota (estimated value) across the three main negotiation forums in 2020, 2021, and 2022



Comparison against UK's shares as an EU Member State

Since leaving the EU, the UK now has a larger share of many of the TACs set at these negotiations. This means that TAC cuts are reduced, and TAC increases are heightened, as the UK receives a larger share of the total.

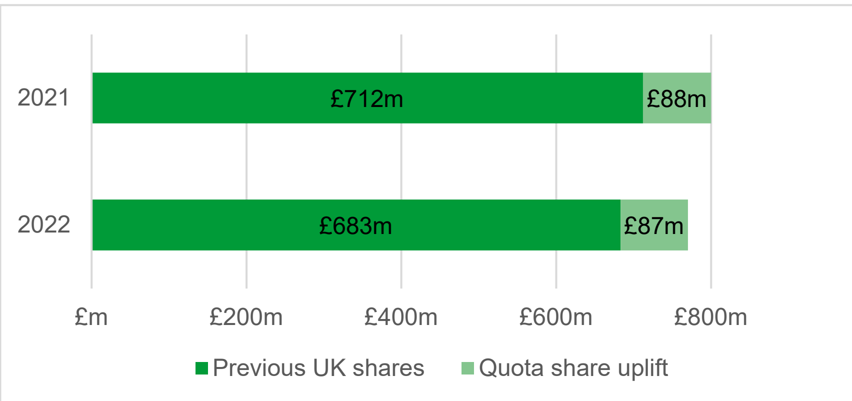
The quota shares that the UK received in 2020 are used to generate an estimate of how much quota the UK might have received from these three negotiations had it remained as an EU Member State in each year[12].

Based on these previous shares, it is estimated that the UK might have received around 531,000 tonnes in 2021 (estimated to be worth around £712 million), in comparison to the 620,000 tonnes actually received. This uplift is estimated to be worth around £88 million.

In 2022, it is estimated that the UK might have received around 509,000 tonnes with its previous shares (estimated to be worth around £683 million), in comparison to the 596,000 tonnes actually received. This uplift is estimated to be worth around £87 million. Despite higher shares in 2022 than in 2021, the resulting uplift is slightly smaller due to TACs being set at a lower level overall in 2022.

This uplift is comprised of a number of different quotas, with some of the largest contributors being West Coast mackerel, North Sea sole, and North Sea herring. Please see Annex 1 and analysis from the Marine Management Organisation for more information. The stacked bar chart below illustrates the proportion of the UK's overall quota value from these three negotiations in 2021 and 2022 that is estimated to be due to these uplifts.

Figure 3: UK quota share uplift (estimated value) across the three main negotiation forums



[12] 2020 is used as the UK's final year as an EU Member State. This share is primarily based on the relative stability sharing mechanism, but also includes invocations of the Hague Preference in that year, as well as contribution to/benefit from the EU's quota transfer agreements with countries such as Norway.

Adjusting for historic uptake

The figures above represent the full quota available to the UK fleet from these negotiations. In a given year, it is difficult to accurately predict how much of each quota will be fished, as this is dependent on a wide range of factors such as weather, fishing capacity, and the availability of by-catch quota.

However, to provide context, the historic percentage uptake of each of the quotas between 2016-2020 is used to calculate an approximation[13]. This may not be accurate for a variety of reasons, for example, if the current size of the quota is smaller or larger than in the past. This also does not account for any banking, borrowing, or swapping of quota. In reality, the true landing figures could be higher or lower.

In 2021, based on historic uptake percentages, we might expect around 516,000 tonnes of the 620,000 tonnes of quota to be utilised, with a value of around £650 million.

In 2022, based on historic uptake percentages, we might expect around 503,000 tonnes of the 596,000 tonnes of available quota to be utilised, with a value of around £633 million.

Some of the key underutilised quotas contributing to this tonnage include North Sea plaice, Norway pout and Atlanto-Scandian herring.

[13] UK landings for each year between 2016 and 2020 (UK sea fisheries annual statistics report 2020 - GOV.UK (www.gov.uk)) taken as a percentage of the quota available at the start of that year (Fishing quotas (europa.eu)), and applied to the 2021 and 2022 UK quotas.

UK-EU bilateral negotiations

70 TACs of direct interest to the UK were set through UK-EU bilateral negotiations for the 2021 fishing year, and 69 TACs for the 2022 fishing year[14].

For 2021, these 70 TACs provided around 152,000 tonnes of UK quota, with an estimated value of around £331 million[15].

For 2022, these 69 TACs provided around 138,000 tonnes of UK quota, with an estimated value of around £311 million. These figures are net of quota transfers agreed with Norway and the Faroe Islands.

Table 2: UK quota from UK-EU negotiations

	2020	2021	2022
UK quota (t)	133,000	152,000	138,000
Difference from previous year (%)		+14%	-9%
UK quota value (£)	£306 million	£331 million	£311 million
Difference from previous year (%)		+8%	-6%

2021 fishing year:

In aggregate, TACs were set lower in 2021 than in 2020. 39 TACs (56%) were reduced, 13 TACs (19%) increased, and the remaining 18 TACs (26%) set at the same tonnage.

Despite the TAC cuts, UK quota increased by 14% in tonnage and 8% in value compared to the previous year, primarily due to the quota share uplifts agreed in the UK-EU Trade & Cooperation Agreement.

The UK's largest tonnage uplifts compared to the previous year were in the quotas for:

- Norway pout (+11,700 tonnes)
- Southern North Sea and Eastern Channel horse mackerel (+2,700 tonnes)
- Western ling (+2,500 tonnes)

[14] The difference between years is due to the TAC for sandeels, which is set mid-year and therefore has not yet been agreed for 2022 fishing opportunities. This TAC was exceptionally set within the 2021 annual negotiations due to the late conclusion of negotiations for that year.

[15] These figures differ slightly from the press release immediately following the negotiations due to Norway Pout quota. This TAC is set for November to October rather than the calendar year, and the UK share has been adjusted in order to account for the UK having had a 0% share in November/December 2020 whilst still covered by the Common Fisheries Policy.

These increases were primarily because the UK had a share of Norway pout for the first time in 2021 and share uplifts in the other two TACs. In 2020, but not in 2021, horse mackerel and ling were also contributed as outward payment quota in the EU's transfer deals with Norway and the Faroe Islands, which lowered the UK's allocation of these quotas.

The UK's largest falls in tonnage were in the quotas for:

- North Sea Nephrops (-3,400 tonnes)
- Sandeels (-2,200 tonnes)
- Rockall haddock (-1,500 tonnes)

These were all driven by reductions in the agreed TACs.

2022 fishing year:

In aggregate, TACs were set lower in 2022 than in 2021. 32 TACs (46%) were reduced, 15 TACs (22%) increased, and the remaining 22 TACs (32%) set at the same tonnage. Deep-sea TACs are set once every two years, which means that some TACs automatically remained the same between 2021 and 2022.

UK quota saw a 9% fall in tonnage and a 6% fall in value compared to 2021. This was primarily due to TAC cuts, which outweighed the UK's quota share uplifts in the overall figure. Some quotas were also used as payment in the UK's deals with Norway and the Faroe Islands.

The UK's largest tonnage uplifts compared to the previous year were in:

- North Sea Nephrops (+4,500 tonnes)
- Irish Sea herring (+1,200 tonnes)
- Anglerfish in Area 7 (+900 tonnes)

These uplifts were driven by a large TAC increase for North Sea Nephrops, and a combination of TAC and share increases for the other two quotas.

The UK's largest falls in tonnage were in:

- North Sea anglerfish (-2,500 tonnes)
- Western ling (-2,600 tonnes)
- Rockall haddock (-2,100 tonnes)

These were mainly driven by reductions in the agreed TACs. Also, 1,500 tonnes of Western ling were transferred out to Norway and the Faroe Islands.

UK-EU-Norway trilateral negotiations

11 TACs of direct interest to the UK are set through these negotiations.

For 2021, these 11 TACs provided around 162,000 tonnes of UK quota, estimated to be worth approximately £184 million.

For 2022, these 11 TACs provided around 176,000 tonnes of UK quota, estimated to be worth approximately £191 million.

Table 3: UK quota from UK-EU-Norway negotiations

	2020	2021	2022
UK quota (t)	151,000	162,000	176,000
Difference from previous year (t)		+7%	+9%
UK quota value (£)	£174 million	£184 million	£191 million
Difference from previous year (£)		+6%	+4%

2021 fishing year:

In aggregate, TACs were set lower in 2021 than in 2020. 8 of the 11 TACs were reduced, and the remaining 3 TACs increased.

Despite the TAC cuts, UK quota increased by 7% in tonnage and 6% in value compared to the previous year. This was primarily due to the quota share uplifts agreed in the UK-EU Trade & Cooperation Agreement.

The largest tonnage increase was in North Sea herring (+5,700 tonnes). This was driven by the UK's quota share uplift, which meant that the UK received more quota than in 2021 despite a reduction in the TAC.

The largest fall in both tonnage and value was in North Sea plaice (-900 tonnes). However, due to changes in the TAC deductions made for discard exemptions, the final UK quota allocated for North Sea plaice was 11,600 tonnes higher than that allocated in the previous year[16].

[16] The North Sea plaice TAC deduction made for discard exemptions by the UK in 2021 (for UK vessels only) was smaller than that made by the EU in 2020. See UK methodology here: [Calculating the Total Allowable Catch Deductions for Discard Exemptions - GOV.UK (www.gov.uk)]

2022 fishing year:

In aggregate, TACs were set higher in 2022 than in 2021. 3 of the 11 TACs were reduced, 6 TACs increased, and the remaining 2 TACs set at the same tonnage.

The largest increase in both total tonnage and estimated value was in North Sea herring (+15,000 tonnes). This increase was driven by both a TAC increase and the UK's quota share uplift.

The largest fall in both tonnage and value was in North Sea plaice (-5,000t), due to a TAC cut and only a small share uplift. The UK's landing obligation exemption deduction in 2022 will be at a similar level to that in 2021, so does not impact the year-on-year comparison.

These figures also include an outward transfer of 400 tonnes of North Sea haddock to the Faroe Islands, and an inward transfer of 500 tonnes of North Sea whiting from Norway.

Coastal States negotiations

6 TACs of direct interest to the UK are set through these negotiations. The most important of these to the UK are mackerel, blue whiting, and Atlanto-Scandian herring (ASH).

For 2021, these 6 TACs provided around 307,000 tonnes of UK quota, estimated to be worth approximately £285 million.

For 2022, these 6 TACs provided around 281,000 tonnes of UK quota, estimated to be worth approximately £268 million.

In both years, the majority of the tonnage and value was due to mackerel (222,000t, worth £266m in 2021; and 211,000t, worth £252m in 2022).

Table 4: UK quota from Coastal States negotiations

	2020	2021	2022
UK quota (t)	289,000	307,000	281,000
Difference from previous year (t)		+6%	-8%
UK quota value (£)	£275 million	£285 million	£268 million
Difference from previous year (£)		+4%	-6%

2021 fishing year:

The TACs for mackerel and blue whiting were reduced in 2021 compared to 2020, and the TAC for ASH was increased. However, the UK received more quota than the previous year for all three due to the share quota uplifts agreed in the Trade & Cooperation Agreement, and the fact that the UK did not contribute blue whiting as outward payment quota in the EU's transfer deals with Norway and the Faroe Islands.

2022 fishing year:

The TACs for mackerel, blue whiting and ASH were reduced in 2022 compared to 2021. The UK received less quota than the previous year as the TAC cuts outweighed the UK's quota share uplifts for 2022.

Total UK quota from all sources

The UK also holds quota in a number of TACs that are not negotiated at the three forums covered above. The following section summarises these, in order to provide a full overview of UK quota in 2021 and 2022.

In total, for the 2021 fishing year, the UK had around 644,000 tonnes of quota from the 3 main negotiation forums and other sources summarised below. This is estimated to be worth approximately £884 million.

For the 2022 fishing year, the UK had around 620,000 tonnes of quota from the three main negotiation forums and other sources summarised below. This is estimated to be worth approximately £849 million.

Regional Fisheries Management Organisations (RFMOs)

The UK receives quota for TACs managed through three RFMOs: The International Commission for the Conservation of Atlantic Tunas (ICCAT), the North West Atlantic Fisheries Organisation (NAFO), and the North East Atlantic Fisheries Commission (NEAFC).

The UK secured new shares in four Atlantic TACs managed through ICCAT (albacore tuna, bluefin tuna, blue shark, and swordfish) in the UK-EU Trade & Cooperation Agreement[17]. In 2021, this translated to around 490 tonnes of UK quota, estimated to be worth approximately £1.96 million[18]. In 2022, this increased slightly to around 520 tonnes of UK quota, estimated to be worth approximately £2.02 million.

In 2021, the UK had around 140 tonnes of cod quota in area 3M through NAFO, estimated to be worth approximately £355,000. In 2022, the UK's quota increased to 373 tonnes due to a large TAC increase, estimated to be worth around £946,000. 187 tonnes of this quota were transferred to Norway and 186 tonnes to the Faroe Islands, meaning the UK transferred out all quota in this stock in 2022 as part of bilateral quota transfer deals. Therefore, it is not included in the total below.

In 2021, the UK had 958 tonnes quota in stocks exclusively in the NEAFC Regulatory Area (150 tonnes of Greenland Halibut, and 808 tonnes of Redfish), estimated to be worth approximately £1.2 million. In 2022, the UK had 820 tonnes of redfish quota, estimated to

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[17] As these quotas were new for the UK in 2021, prices based on EU vessel average landings are used to estimate the potential value of the quota.

[18] This represents the full UK albacore quota for 2021, which is shared among UK and UK Overseas Territories.

be worth around £700,000. Following wider negotiations, no UK quota was set for Greenland Halibut in 2022. This drives the majority of the fall in UK quota in this area in 2022 shown in the table below.

Table 5: Total UK quota from RFMO negotiations

	2020	2021	2022
UK quota (t)	980	1,590	1,340
Difference from previous year (t)		+62%	-15%
UK quota value (£)	£2.7 million	£3.6 million	£2.7 million
Difference from previous year (£)		+33%	-24%

Stocks which are present in the waters of only one of the UK or the EU

There are several stocks that are present in either UK or EU waters, but not in both, for which the other Party to the UK-EU TCA nevertheless holds a share. For example, ling in Area 5. In these cases, the Party in whose waters the stock occurs is responsible for setting the TAC and notifying the other of their quota. There is also one stock, Clyde herring, which is exclusive to the UK and for which the UK holds 100% of the quota[19].

In 2021, these stocks provided around 17,100 tonnes of UK quota, estimated to be worth approximately £68.6 million.

In 2022, these stocks provided around 12,100 tonnes of UK quota, estimated to be worth approximately £51.3 million. This excludes 600 tonnes of North Sea/West of Scotland Greenland halibut transferred to Norway, and 750 tonnes transferred to the Faroe Islands.

Over 90% of this value in both years is due to one stock that is present in UK waters only: West of Scotland Nephrops (£62 million in 2021, and £50 million in 2022). TAC cuts in this stock for both 2021 and 2022 drive the overall fall in value shown in the table below.

Table 6: UK quota outcomes across stocks present in only one of UK / EU waters

	2020	2021	2022
UK quota (t)	17,100	17,100	12,100
Difference from previous year (t)		0%	-29%
UK quota value (£)	£69.4 million	£68.6 million	£51.3 million
Difference from previous year (£)		-1%	-25%

[19] The TAC for Clyde herring starts on 1 July, therefore this TAC has not yet been agreed beyond July 2022.

Quota under the Treaty of Paris

The UK has access to fishing opportunities in the waters around Svalbard through the Treaty of Paris[20].

In 2021, these opportunities included 5,500 tonnes of Svalbard Cod allocated by Norway, estimated to be worth approximately £12.6 million.

In 2022, these opportunities included 6,550 tonnes of Svalbard Cod allocated by Norway, estimated to be worth approximately £14.9 million.

Table 7: UK quota outcomes under the Treaty of Paris

	2020	2021	2022
UK quota (t)	3,300	5,500	6,550
Difference from previous year (t)		+67%	+19%
UK quota value (£)	£7.5 million	£12.6 million	£14.9 million
Difference from previous year (£)		+68%	+19%

Quota from transfers with countries other than the EU

The UK previously participated in the EU's quota transfer deals with Norway, the Faroe Islands, and Greenland.

In 2020, the UK received around 19,300 tonnes of quota in Norwegian, Faroese and Greenlandic waters, estimated to be worth approximately £37.5 million in fishing opportunities. Around 50% of the available inward quota was landed in 2020[21]. The majority of the UK quota value was in one TAC: Arctic cod in Norwegian waters. The UK also used to contribute outward payment quota to the EU's transfer deals with Norway and the Faroe Islands and made a financial contribution to the EU's agreement with Greenland.

The UK signed bilateral Fisheries Framework Agreements with Norway and the Faroe Islands in 2020[22] and held bilateral negotiations with each of them for the 2021 fishing

[20] Fisheries: cooperation between the UK and Norway - GOV.UK (www.gov.uk)

[21] "Inward quota" refers to quota transferred to the UK from another country. Quota use statistics - GOV.UK (www.gov.uk)

[22] UK/Norway: Framework Agreement on Fisheries [CS Norway No.1/2020] - GOV.UK (www.gov.uk), UK/Faroes: Framework Agreement on Fisheries [CS Faroe Islands No.1/2020] - GOV.UK (www.gov.uk)

year. No quota transfers were agreed with either for 2021. The UK did not hold bilateral negotiations with Greenland for 2021.

For the 2022 fishing year, the UK has agreed deals with both Norway[23] and the Faroe Islands[24].

The deal with Norway included inward quota transfers for the UK in North Sea whiting, Arcto-Norwegian cod, and anglerfish and hake in Norwegian waters. These inward transfers are estimated to be worth around £5 million in value to the UK. The UK transferred out primarily Western ling, Western tusk, and Greenland halibut in exchange, with outward transfers also valued at around £5 million.

The deal with the Faroe Islands included inward quota transfers of stocks in Faroese waters, including cod/haddock and saithe. These inward transfers are estimated to be worth around £5.5 million in value to the UK. This has the potential to increase to around £7.75 million if the UK and the Faroe Islands agree to a mid-year adjustment. The UK transferred out primarily haddock, horse mackerel, Greenland halibut and blue ling in exchange, with outward transfers also valued at around £5.5 million.

The table below summarises the transfers of quota in third country waters only. This does not include transfers of quotas in the North Sea because these are already accounted for in the sections above (i.e., the forums where those TACs are set).

Table 8: UK quota from transfers with countries other than the EU

	2020	2021	2022[25]
UK quota (t)	19,300	0	4,830
Difference from previous year (t)		-100%	N/a
UK quota value (£)	£37.5 million	£0	£10 million
Difference from previous year (£)		-100%	N/a

Arcto-Norwegian cod and Other Species in Norwegian waters comprise the majority of the decrease in between 2020 and 2022, with the UK having around 13,000 fewer tonnes of quota, worth roughly £29 million. This decrease is somewhat offset in the overall figure by increases in UK quota for the Faroese stocks, as well as North Sea whiting, North Sea blue ling, and Anglerfish in Norwegian waters.

[23] Fisheries: bilateral agreement with Norway for 2022 - GOV.UK (www.gov.uk)

[24] Fisheries: bilateral agreement with the Faroe Islands for 2022 - GOV.UK (www.gov.uk)

[25] No applicable percentage changes.

Quota allocations

Quota allocations have not yet been finalised for 2022, so this assessment is available for 2021 only[26].

After TAC deductions for discard exemptions were applied, and excluding unallocated quotas, around 626,000 tonnes of quota was allocated to UK vessels in 2021, estimated to be worth approximately £857 million.

During the allocation process, this quota was split into "existing quota" (quota the UK would have expected to receive as an EU Member State), and "additional quota" (quota received as a result of the quota share uplifts agreed in the UK-EU TCA)[27]. The below table shows the tonnage and estimated value split between these two categories in 2021.

Table 9: Existing vs. additional quota in 2021

	Total allocated quota	Existing quota	Additional quota	Additional quota as % of total allocated quota
UK quota (t)	626,000	566,000	60,000	10%
UK quota value (£)	£857 million	£777 million	£80 million	9%

Pelagic stocks comprised the majority (75%) of the additional quota tonnage in 2021. This was primarily driven by the UK's quota share uplift agreed for mackerel, which provided the largest amount of additional quota overall in terms of both tonnage and value (around 22,000 tonnes, estimated to be worth £26 million), followed by North Sea herring (around 12,000 tonnes, estimated to be worth £6 million).

Demersal stocks comprised the majority (54%) of the additional quota value in 2021. The demersal stocks with the highest additional quota value were North Sea sole (1,600 tonnes, estimated to be worth £12 million), Anglerfish in Area 7 (1,200 tonnes, estimated to be worth £4 million), and Svalbard cod (1,400 tonnes, estimated to be worth £3 million).

Additional quota was apportioned between the four UK Fisheries Administrations according to a new method in 2021. This was based primarily on the previous track record of fishing activity in each nation, and the principle of zonal attachment (which reflects the areas where fish are present in UK waters).

[26] Fishing quota allocations for 2021 for England and the UK - GOV.UK (www.gov.uk)

[27] UK and England quota management rules - GOV.UK (www.gov.uk)

Table 10: Additional quota per Fisheries Administration in 2021

	England	Northern Ireland	Scotland	Wales
UK quota (t)	16,100	4,700	38,400	300
% Of total tonnes	27.1%	7.9%	64.4%	0.6%
UK quota value (£)	£33.3m	£5.9m	£39.8m	£1m
% Of total value	41.6%	7.3%	49.8%	1.3%

This table shows that the majority of the additional quota tonnage was apportioned to Scotland (64%), whereas England received a relatively higher proportion of the additional quota value (42%). This is primarily due to Scotland's share of high-tonnage pelagic quotas, and England's share of high-value demersal quotas.

For context on the size of the fleets in each fisheries administration, England contributes the highest number of vessels to the UK fleet (45%), but Scotland's fleet has more capacity (60%). 43% of UK fishers worked onboard English vessels and 42% on Scottish vessels. The rest (15%) are split almost evenly between Welsh and Northern Irish vessels[28].

[28] UK sea fisheries annual statistics report 2020 - GOV.UK (www.gov.uk)

Annex 1: UK-EU Trade and Cooperation Agreement

On 30 December 2020, the UK and the EU signed the Trade and Cooperation Agreement (TCA)[29], which included agreement on the management of UK-EU fish stocks following the UK's departure from the EU and the end of the Transition Period.

The TCA includes agreed quota shares for over 100 fish stocks. Many of the UK's shares will increase gradually over a 5-year period, with the highest uplifts in a single year received in 2021.

Comparison of figures

The full quota share uplifts (by 2026) secured in the TCA were estimated to be worth around £146 million.

This figure was calculated using the full stock list negotiated in the TCA and estimates the difference between the UK's Relative Stability shares and UK's final shares in 2026, assuming 2020 TACs, and 2018 UK average prices. Please see the Marine Management Organisation's Analysis of fishing quota shares in the EU-UK Trade and Cooperation Agreement for more detail.

Although similar, this is not directly comparable to the figures in this report. This is because the figures in this report are calculated using the stock list for each annual negotiation forum (i.e., subsets of the stock list negotiated in the TCA). They also use the UK's agreed shares for 2021 and 2022 (rather than 2026) and are based on different TACs (those agreed at annual negotiations for 2021 and 2022), and more recent UK average prices (2019).

[29] UK/EU and EAEC: Trade and Cooperation Agreement [TS No.8/2021] - GOV.UK (www.gov.uk)

Annex 2: TAC categories

In practice, there are some minor differences between the categorisation of TACs in the Secretary of State's determination[30] (based on which Parties share the TACs, following the annexes in the Trade & Cooperation Agreement), and the categorisation of TACs in this report (based on which negotiation forum sets the relevant TAC).

Explanation of how these categories fit with one another is provided below, as well as a data table.

UK-EU

There are 76 UK-EU shared TACs.

3 of these are shared only between the UK and the EU but in practice are dependent on TACs decided at the UK-EU-Norway negotiations. These TACs are therefore included in the UK-EU-Norway section below: Cod (Eastern Channel), Haddock (West of Scotland), and Saithe (West of Scotland).

3 TACs are excluded from this report:

- 1 TAC is prohibited: Deep-Sea Sharks (Western)
- 1 TAC is an 'of which' provision of another TAC and is excluded to avoid double counting: Nephrops (Porcupine Bank)
- 1 TAC is set in-year and did not have an agreed TAC at the time of negotiations concluding: Sprat (North Sea)

Consequently, 70 UK-EU TACs are covered in this report.

For the 2022 fishing year, the sandeels TAC is also excluded, because this TAC is set mid-year. Due to the late conclusion of the 2021 negotiations, sandeels is exceptionally included in the total for that year.

UK-EU-Norway

There are 8 UK-EU-Norway shared TACs.

Including the 3 TACs mentioned above means that 11 UK-EU-Norway TACs are covered in this report.

[30] [Fishing opportunities for British fishing boats - GOV.UK (www.gov.uk)]

Coastal States

There are 3 coastal States TACs: mackerel (North Sea), mackerel (western), and blue whiting (northern).

There are 3 further TACs that are included in the section “stocks which are present in the waters of only one of the United Kingdom and the European Union” in the Secretary of State’s determination, however in practice are agreed at the coastal States negotiations: Atlanto-Scandian herring (ASH), Redfish [deep pelagic] and Redfish [shallow pelagic].

Therefore, 6 Coastal States TACs are covered in this report.

Overall, this gives 87 TACs (70+11+6) across the UK’s annual fisheries consultations for 2021, and 86 TACs (69+11+6) across the UK’s annual fisheries consultations for 2022.

Other sources of UK quota

The UK also receives quota in a number of other TACs:

The UK receives quota through three RFMOs: The Northwest Atlantic Fisheries Organisation (NAFO); the International Commission for the Conservation of Atlantic Tunas (ICCAT); and the Northeast Atlantic Fisheries Commission (NEAFC). There are 7 TACs in this category.

The UK has access to fishing opportunities in the waters around Svalbard under the Treaty of Paris. The UK is not involved in setting the TAC for this stock. There is 1 TAC in this category (Svalbard cod).

There are a number of stocks where the UK or EU alone set the TAC (such as Clyde Herring and Skates and Rays (8,9)). There are 8 TACs in this category.

The UK may receive quota transfers through agreements with third countries such as Norway and the Faroe Islands. In 2021, the UK did not agree to make/receive any transfers of this nature. The TACs included in this category are the ones included in the 2022 agreement. This is not a definitive list, and it may change in future years.

TAC list and UK quota data

The tables below align with the annexes in the Secretary of States determination of fishing opportunities for British fishing boats. The third column indicates which negotiation category these TACs fall into in this report, as detailed above.

UK quota tonnages for 2021 and 2022, as well as the percentage change between years, are also shown.

Annex Table 1: United Kingdom-European Union bilateral stocks

TAC code	Common name	Annual negotiation TAC-setting forum	2021 UK quota (tonnes)	2022 UK quota (tonnes	% Change in quota (2022 vs. 2021)
ALF/3X14-	Alfonsinos (3,4,5,6,7,8,9,10,12,14)	UK-EU	7	7	-
ANF/07.	Anglerfish (7)	UK-EU	8,090	8,959	+11%
ANF/2AC4-C	Anglerfish (North Sea)	UK-EU	10,327	7,849	-24%
ANF/56-14	Anglerfish (West of Scotland)	UK-EU	2,488	2,060	-17%
ARU/1/2.	Greater Silver Smelt (1,2)	UK-EU	25	25	-
ARU/3A4-C	Greater Silver Smelt (North Sea)	UK-EU	13	13	-
ARU/567.	Greater Silver Smelt (Western)	UK-EU	208	650	+213%
BLI/12INT-	Blue Ling (International 12)	UK-EU	1	1	-
BLI/24-	Blue Ling (North Sea)	UK-EU	7	32[31]	+357%
BLI/5B67-	Blue Ling (Western)	UK-EU	2,614	1,967[32]	-25%
BOR/678-	Boarfish (Western)	UK-EU	1,218	1,450	+19%
BSF/56712-	Black Scabbardfish (Western)	UK-EU	110	110	-
COD/07A.	Cod (Irish Sea)	UK-EU	91	91	-
COD/07D.	Cod (Eastern Channel)	UK-EU-Norway	71	71	-
COD/5BE6A	Cod (West of Scotland)	UK-EU	892	904[33]	+1%
COD/5W6-14	Cod (Rockall)	UK-EU	49	51	+4%
COD/7XAD34	Cod (Celtic Sea)	UK-EU	75	61	-19%
DGS/15X14	Spurdog (Western)	UK-EU	115	117	+2%
DWS/56789-	Deep-sea Sharks (Western)	Prohibited	0	0	-
HAD/07A.	Haddock (Irish Sea)	UK-EU	1,779	1,628	-8%
HAD/5BC6A.	Haddock (West of Scotland)	UK-EU-Norway	3,843	4,035	+5%
HAD/6B1214	Haddock (Rockall)	UK-EU	6,971	4,874	-30%
HAD/7X7A34	Haddock (Celtic Sea)	UK-EU	2,400	2,550	+6%
HER/07A/MM	Herring (Irish Sea)	UK-EU	6,533	7,736	+18%
HER/5B6ANB	Herring (West of Scotland)	UK-EU	2,229	2,250	+1%

[31] Includes 25t inward quota transfer from Norway.

[32] Excludes 60t outward quota transfer to Norway and 500t outward quota transfer to Faroe Islands.

[33] Excludes 15t outward quota transfer to Norway and 10t outward quota transfer to Faroe Islands.

TAC code	Common name	Annual negotiation TAC-setting forum	2021 UK quota (tonnes)	2022 UK quota (tonnes	% Change in quota (2022 vs. 2021)
HER/7EF.	Herring (Western Channel and Bristol Channel)	UK-EU	465	465	-
HER/7G-K.	Herring (Celtic Sea)	UK-EU	1	1	-
HKE/2AC4-C	Hake (North Sea)	UK-EU	1,354	1,181	-13%
HKE/571214	Hake (Western)	UK-EU	10,884	8,821[34]	-19%
JAX/2A-14	Horse Mackerel (Western)	UK-EU	6,597	4,767[35]	-28%
JAX/4BC7D	Horse Mackerel (Southern North Sea and Eastern Channel)	UK-EU	4,000	2,816	-30%
L/W/2AC4-C	Lemon Sole and Witch (North Sea)	UK-EU	3,476	2,766	-20%
LEZ/07.	Megrims (7)	UK-EU	3,421	3,660	+7%
LEZ/2AC4-C	Megrims (North Sea)	UK-EU	2,490	2,660	+7%
LEZ/56-14	Megrims (West of Scotland)	UK-EU	2,046	2,258	+10%
LIN/03A-C.	Ling (3a)	UK-EU	13	11	-15%
LIN/04-C.	Ling (North Sea)	UK-EU	3,004	2,473	-18%
LIN/6X14.	Ling (Western)	UK-EU	6,669	4,032[36]	-40%
NEP/07.	Nephrops (7)	UK-EU	6,908	6,686	-3%
NEP/2AC4-C	Nephrops (North Sea)	UK-EU	16,524	21,021	+27%
NOP/2A3A4.	Norway Pout (North Sea)	UK-EU	11,745	10,204	-13%
PLE/07A.	Plaice (Irish Sea)	UK-EU	1,455	1,404	-4%
PLE/56-14	Plaice (West of Scotland)	UK-EU	400	400	-
PLE/7DE.	Plaice (English Channel)	UK-EU	3,533	2,717	-23%
PLE/7FG.	Plaice (7fg)	UK-EU	480	441	-8%
PLE/7HJK.	Plaice (7hjk)	UK-EU	11	19	+73%
POK/56-14	Saithe (West of Scotland)	UK-EU-Norway	2,327	1,913	-18%
POK/7/3411	Saithe (Celtic Sea)	UK-EU	481	384	-20%
POL/07.	Pollack (7)	UK-EU	2,071	1,821	-12%
POL/56-14	Pollack (West of Scotland)	UK-EU	67	57	-15%
PRA/2AC4-C	Northern Prawn (North Sea)	UK-EU	145	218	+50%
RJE/7FG.	Small-eyed Ray (7fg)	UK-EU	54	57	+6%
RJU/7DE.	Undulate Ray (English Channel)	UK-EU	72	75	+4%
RNG/5B67-	Roundnose Grenadier (Western)	UK-EU	112	112	-
RNG/8X14-	Roundnose Grenadier (8,9,10,12,14)	UK-EU	4	4	-
SAN/2A3A4.	Sandeel (North Sea, All Banks)	UK-EU (mid-year)	2,534	0	-100%
SBR/678-	Red Seabream (Western)	UK-EU	11	11	
SOL/07A.	Sole (Irish Sea)	UK-EU	176	181	+3%
SOL/07D.	Sole (Eastern Channel)	UK-EU	640	471	-26%

[34] Excludes 10t outward transfer to Faroe Islands.

[35] Excludes 1,000t outward quota transfer to Faroe Islands.

[36] Excludes 1,200t outward quota transfer to Norway and 300t outward quota transfer to Faroe Islands.

TAC code	Common name	Annual negotiation TAC-setting forum	2021 UK quota (tonnes)	2022 UK quota (tonnes	% Change in quota (2022 vs. 2021)
SOL/07E.	Sole (Western Channel)	UK-EU	1,175	1,111	-5%
SOL/24-C.	Sole (North Sea)	UK-EU	2,544	2,022	-21%
SOL/56-14	Sole (West of Scotland)	UK-EU	11	11	-
SOL/7FG.	Sole (7fg)	UK-EU	433	415	-4%
SOL/7HJK.	Sole (7hjk)	UK-EU	47	36	-23%
SPR/2AC4-C	Sprat (North Sea)	UK-EU (mid-year)	3,331[37]	N/A	
SPR/7DE.	Sprat (English Channel)	UK-EU	1,032	410[38]	-60%
SRX/07D.	Skates and Rays (Eastern Channel)	UK-EU	217	233	+7%
SRX/2AC4-C	Skates and Rays (North Sea)	UK-EU	1,110	1,194	+8%
SRX/67AKXD	Skates and Rays (Western)	UK-EU	2,800	2,793	-
T/B/2AC4-C	Turbot and Brill (North Sea)	UK-EU	1,063	1,022	-4%
USK/04-C.	Tusk (North Sea)	UK-EU	102	92	-10%
USK/567EI.	Tusk (Western)	UK-EU	1,257	585[39]	-53%
WHG/07A.	Whiting (Irish Sea)	UK-EU	416	422	+1%
WHG/56-14	Whiting (West of Scotland)	UK-EU	585	1,140	+95%
WHG/7X7A-C	Whiting (Celtic Sea)	UK-EU	1,134	1,188	+5%

Annex Table 2: United Kingdom-European Union-Norway trilateral stocks

COD/2A3AX4	Cod (North Sea)	UK-EU-Norway	5,824	5,934	+2%
HAD/2AC4.	Haddock (North Sea)	UK-EU-Norway	26,865	28,032[40]	+4%
HER/2A47DX	Herring (North Sea bycatch)	UK-EU-Norway	141	149	+6%
HER/4AB.	Herring (North Sea)	UK-EU-Norway	61,306	75,915	+24%
HER/4CXB7D	Herring (Southern North Sea and Eastern Channel)	UK-EU-Norway	4,406	5,420	+23%
PLE/2A3AX4	Plaice (North Sea)	UK-EU-Norway	37,963	33,271	-12%
POK/2C3A4	Saithe (North Sea)	UK-EU-Norway	6,368	5,012	-21%
WHG/2AC4.	Whiting (North Sea)	UK-EU-Norway	12,507	16,631[41]	+33%

Annex Table 3: Coastal States stocks

MAC/2A34.	Mackerel (North Sea)	Coastal States	1,682	1,603	-5%
MAC/2CX14-	Mackerel (Western)	Coastal States	220,606	209,217	-5%
WHB/1X14	Blue Whiting (Northern)	Coastal States	71,670	58,393	-19%

[37] Mid-year TAC set 1 July 2021 to 30 June 2022.

[38] TAC is for first 6 months of 2022 only (1 January to 30 June).

[39] Excludes 650t outward quota transfer to Norway and 30t outward quota transfer to Faroe Islands.

[40] Excludes 400t outward quota transfer to Faroe Islands.

[41] Includes 500t inward quota transfer from Norway.

Annex Table 4: United Kingdom-Norway stocks

TAC code	Common name	Annual negotiation TAC-setting forum	2021 UK quota (tonnes)	2022 UK quota (tonnes	% Change in quota (2022 vs. 2021)
COD/1N2AB	Arcto-Norwegian Cod	Transfer (Norway)	0	500	N/A
	Miscellaneous Arctic cod by-catch	Transfer (Norway)	0	70	N/A
ANF/04-N.	Anglerfish (Norway)	Transfer (Norway)	0	600	N/A
OTH/04-N.	Hake (Norway)	Transfer (Norway)	0	600	N/A

Annex Table 5: United Kingdom-Faroe Island stocks

C/H/05B-F	Cod and Haddock (5b)	Transfer (Faroes)	0	1,000	N/A
POK/05B-F.	Saithe (5b)	Transfer (Faroes)	0	1,250	N/A
RED/05B-F.	Redfish (5b)	Transfer (Faroes)	0	10	N/A
B/L/05B-F.	Blue Ling and Ling (5b)	Transfer (Faroes)	0	225	N/A
FLX/05B-F.	Flatfish (5b)	Transfer (Faroes)	0	75	N/A
OTH/05B-F.	Other Species (5b)	Transfer (Faroes)	0	500	N/A

Annex Table 6: ICCAT Convention Area stocks

ALB/AN05N	Albacore (North Atlantic)	RFMO (ICCAT)	242	442	+83%
BFT/AE45WM	Bluefin Tuna (Northeast Atlantic)	RFMO (ICCAT)	48	48	-
BSH/AN05N	Blue Shark (North Atlantic)	RFMO (ICCAT)	9	33	+267%
SWO/AN05N	Swordfish (North Atlantic)	RFMO (ICCAT)	0	1	N/A

Annex Table 7: NAFO Convention Area stocks

COD/N3M.	Cod (NAFO 3M)	RFMO (NAFO)	140	0[42]	-100%

Annex Table 8: Stocks which are present in the waters of only one of the United Kingdom and the European Union

GHL/2A-C46	Greenland Halibut (North Sea and West of Scotland)	UK to set TAC	1,868	518[43]	-72%
HER/06ACL.	Herring (Clyde)	UK to set TAC	583	N/a[44]	
HER/1/2-	Herring (ASH)	Coastal States	12,715	11,690	-8%
LIN/05EI.	Ling (5)	UK to set TAC	6	6	-
LIN/1/2.	Ling (1,2)	UK to set TAC	10	8	-20%
NEP/5BC6.	Nephrops (West of Scotland)	UK to set TAC	14,592	11,582	-21%
RED/51214D	Redfish [Deep Pelagic] (5,12,14)	Coastal States	0	0	-
RED/51214S	Redfish [Shallow Pelagic] (5,12,14)	Coastal States	0	0	-

[42] Excludes 187t outward quota transfer to Norway and 186t outward quota transfer to Faroe Islands.

[43] Excludes 600t outward quota transfer to Norway and 750t outward quota transfer to Faroe Islands.

[44] TAC for July 2022 onwards will be set later in the year.

TAC code	Common name	Annual negotiation TAC-setting forum	2021 UK quota (tonnes)	2022 UK quota (tonnes	% Change in quota (2022 vs. 2021)
SBR/10-	Red Seabream (Azores)	EU to set TAC	5	5	-
SRX/89-C.	Skates and Rays (8,9)	EU to set TAC	11	11	-
USK/1214EI	Tusk (1,2,14)	UK to set TAC	6	6	-

Annex Table 9: Special cases

COD/1/2B.	Cod (Svalbard)	Quota under the Treaty of Paris	5,500	6,550	+19%

Annex Table 10: NEFAC Regulatory Area stocks

GHL/1/2INT	Greenland Halibut (International 1,2)	RFMO (NEAFC)	150	0	-100%
RED/1/2INT	Redfish (International 1,2)	RFMO (NEAFC)	808	820	-1%