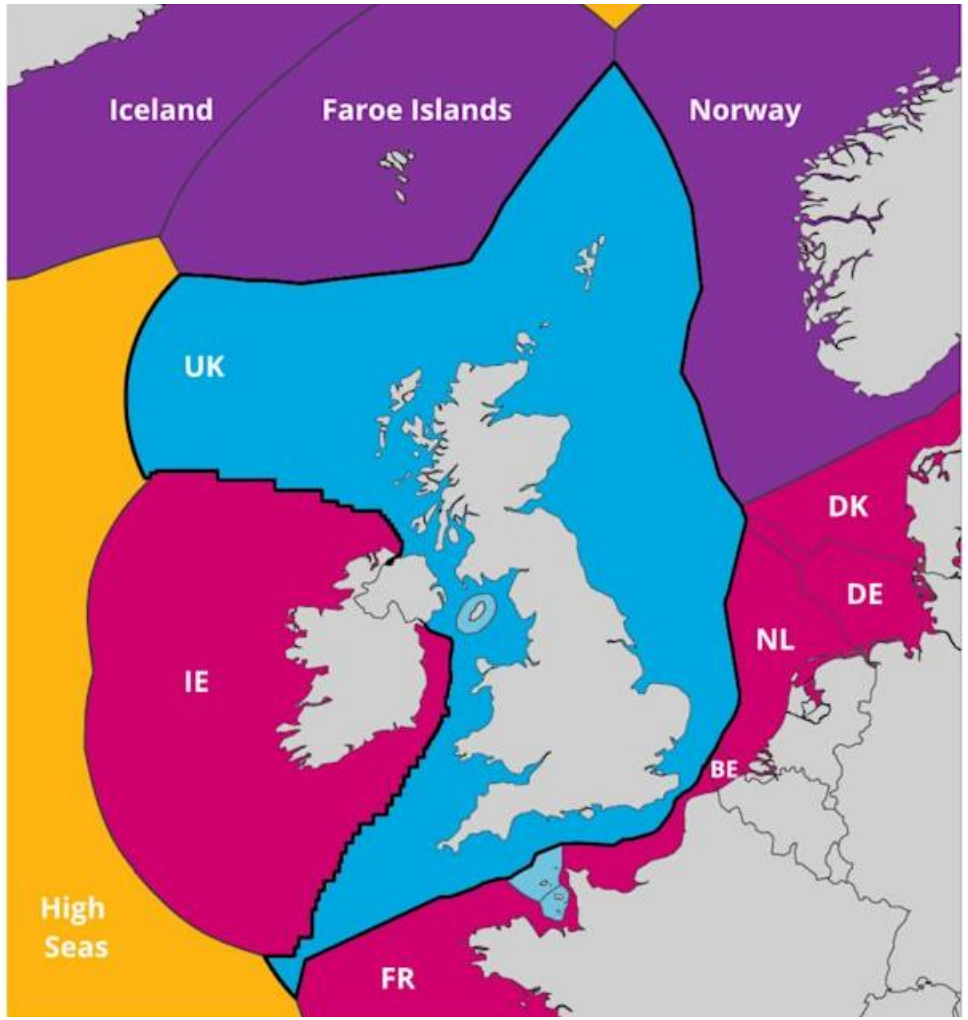
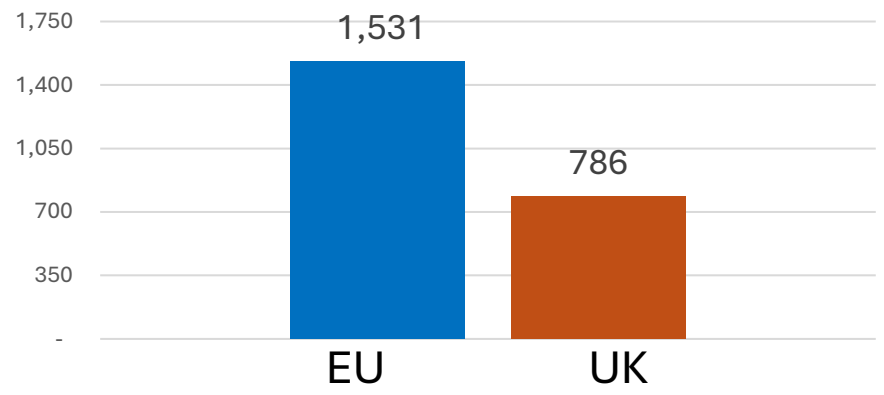
Data on EU vessels in UK waters, including the 6-12nm

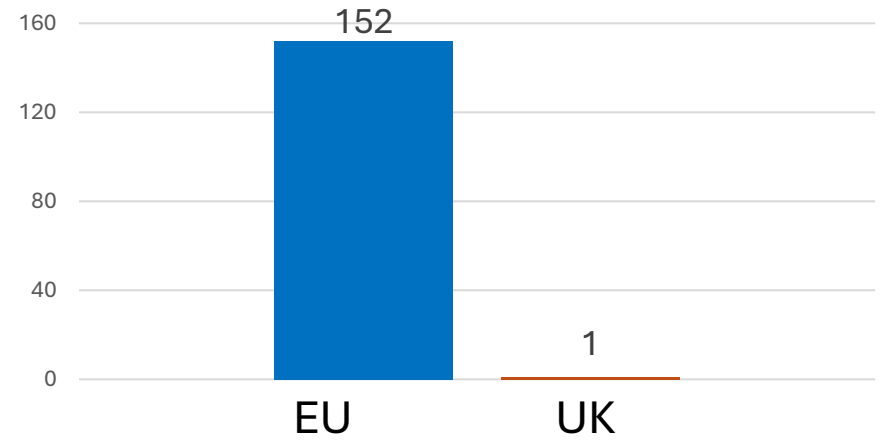


The EU land more from UK waters than vice versa, but we have similar proportions of overall catch

Number of vessels with licenses in the other's **EEZ,** 2025



Number of vessels with licenses in the other's **6-12nmz,** 2025

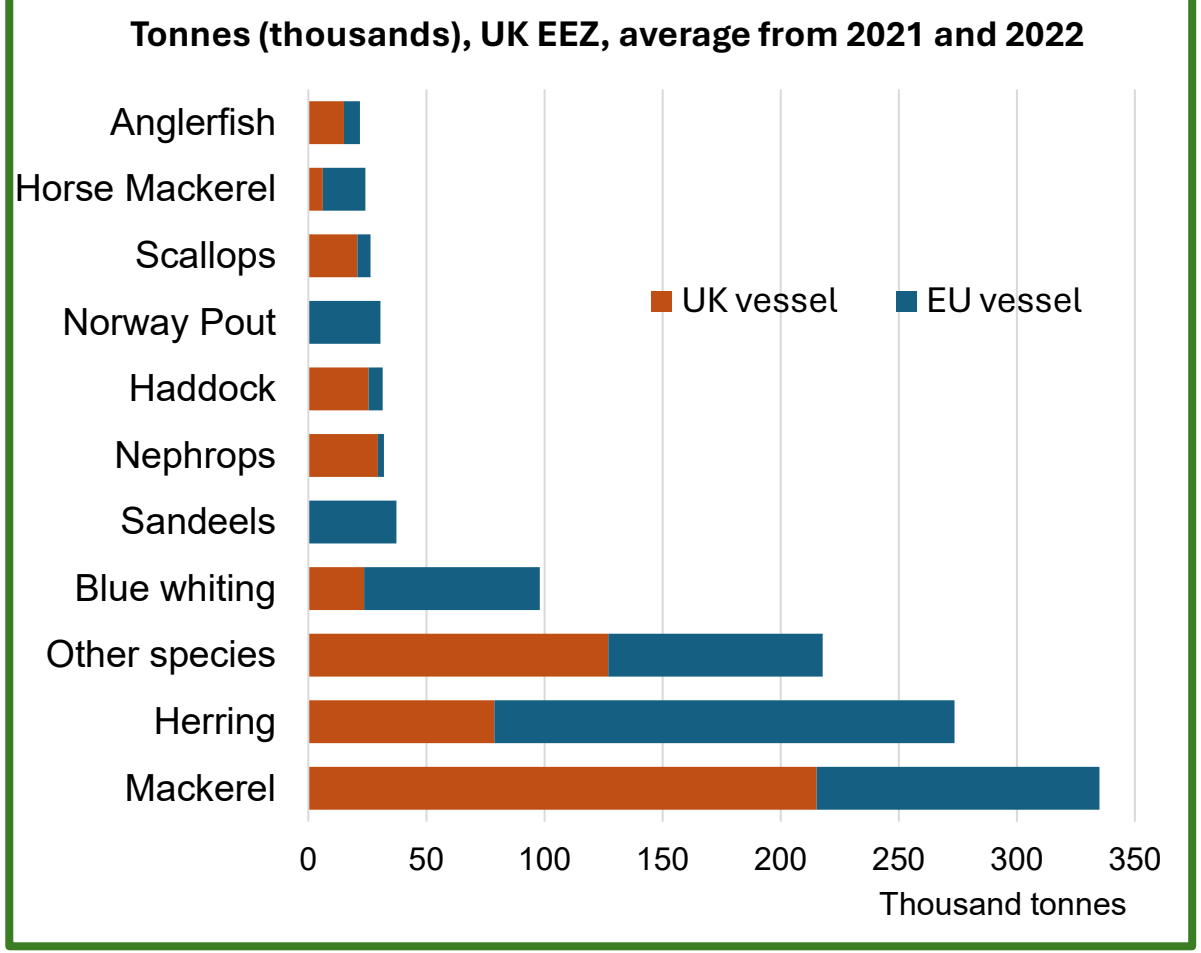


Landings from each others' waters, 2023

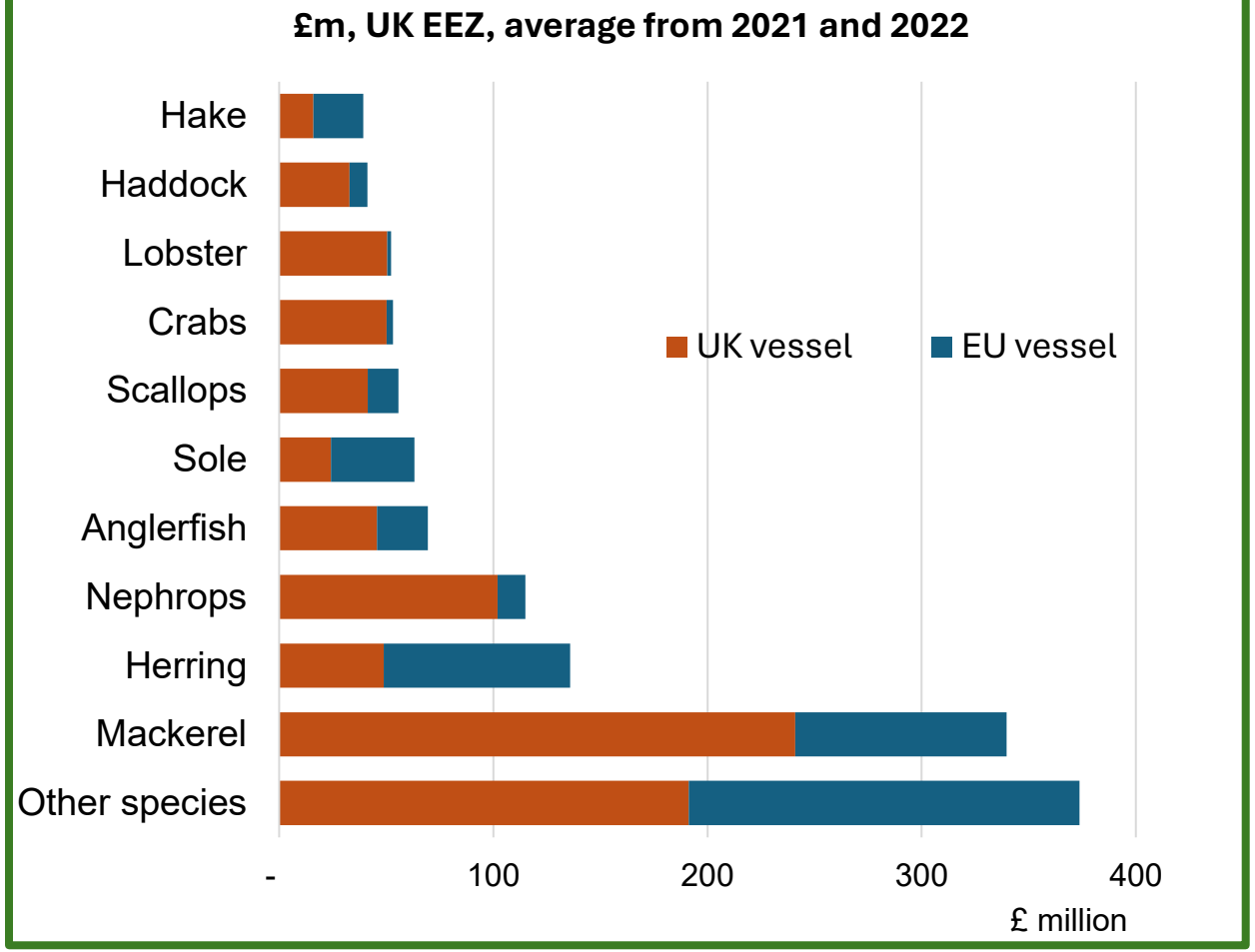
- The EU gets a slightly larger proportion of its total catch from UK waters than vice versa.
- The EU caught **17%** (~580,000 tonnes) of their total catch volume from UK waters, compared to the UK's **11%** (~82,000 tonnes) of their total catches in EU waters.
- In value terms, **7-9%** (£400m - £500m) of the EU's catch was from UK waters, and **7%** (£73m) of the UK's catch was from EU waters.
- Top species by value caught by EU vessels in UK waters (2021 & 2022) are **mackerel, herring, sole, anglerfish**.
- Most valuable species caught by the UK in EU waters (2021 &2022) are **crab, anglerfish, scallop and whiting**.

UK & EU fish capture in UK waters

EU vessels took more fish by weight (52%) from UK waters than UK vessels did, 2021 and 2022 average



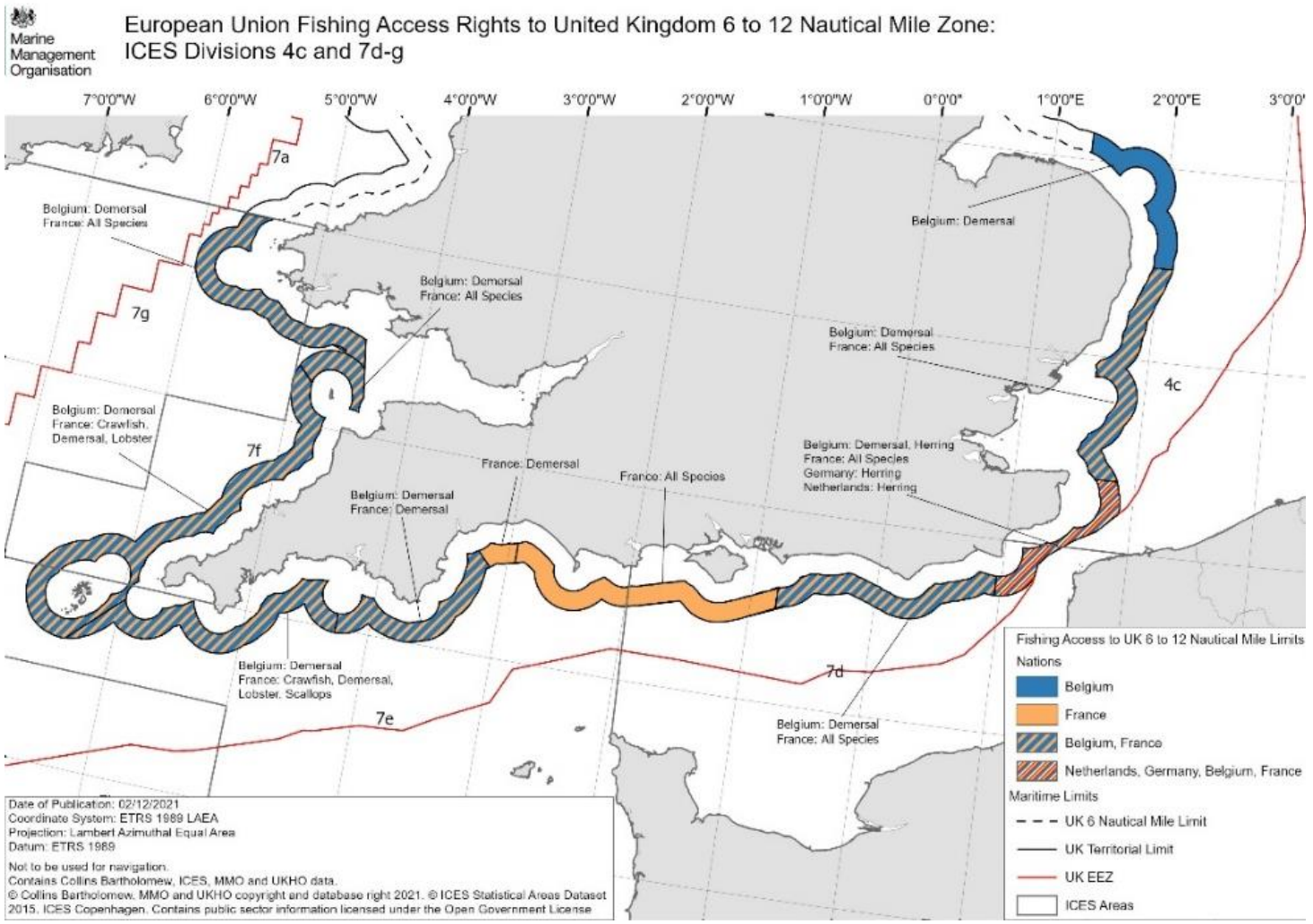
However, UK vessels took 63% of the value of fish captured in UK waters, 2021 and 2022 average



Data excludes Norwegian and Faroese vessels which also fish in UK waters

Data & the 6-12 nautical mile zone

- Currently ~150 EU vessels have access to fish in the UK 6-12
- Rainbow chart (right) shows this
- Access to 6-12 is for the UK to decide
- Data is limited – we estimate what's being caught in the 6-12



~150 EU vessels have licenses for our 6-12, ~110 have used it each year since EU exit, and only 30 – 80 use it in each month.

EU vessels with a valid 6-12nm license

Flag State	Length Group	2021	2022	2023	2024	2025
Belgium	12m and over	20	21	17	17	17
France	12m and over	110	104	109	110	110
France	Under 12m	19	17	23	25	25
EU Total	All	149	142	149	152	152

Licensed EU vessels at assumed fishing speeds with VMS positions in the 6-12

Flag State	Length Group	2021	2022	2023
Belgium	12m and over	14	14	12
France	12m and over	80	83	86
France	Under 12m	6	12	0
EU Total	All	100	109	98

These vessels are registered to Boulogne-sur-Mer (32 vessels, 21-23 average), Saint-Brieuc (21), Dieppe (10), Zeebrugge (9), Caen (6) and others (24).

EU vessels without licenses

- There have been **8 infringements** of EU vessels fishing in the 6-12 between 11/04/2022 and 21/01/2025. These were based on ad hoc at sea inspections.

- Vessel monitoring systems (VMS) have picked up 186 EU vessels each year (21-23 average) with no 6-12 licences at assumed fishing speeds in the 6-12. There is no assurance that fishing occurred, and in most cases it likely didn't.

Figures may underestimate under 12m vessels. They are not obliged to report VMS positions.

What are EU vessels catching in the 6-12?

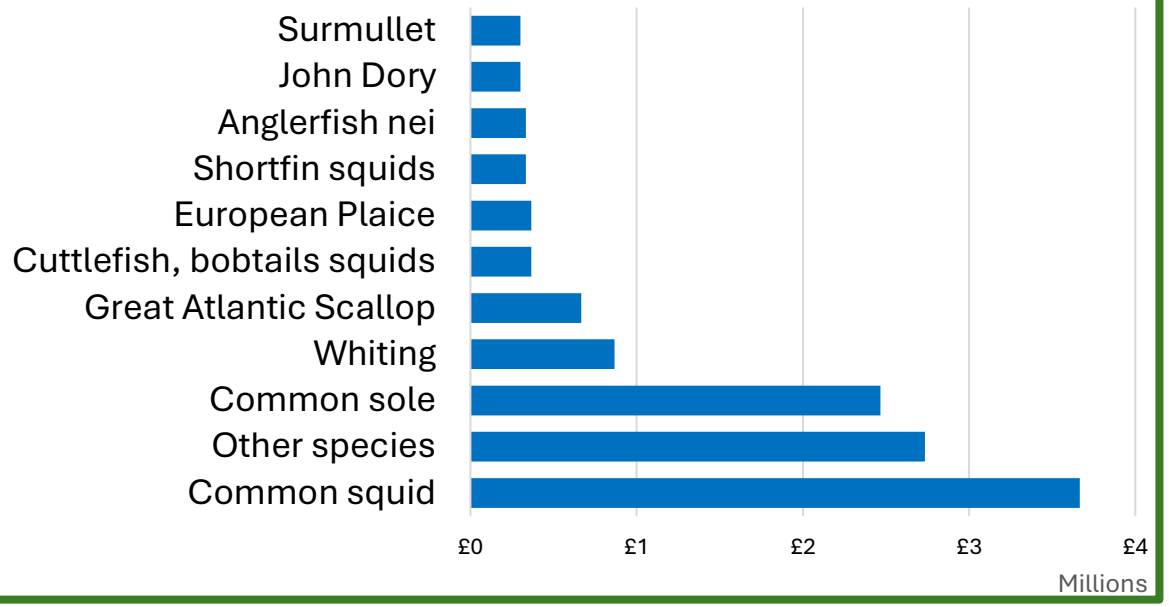
There is no reporting requirement in the 6-12 so we assume that time spent in 6-12 is directly related to volume and value to estimate…

Key findings

- **The EU's catches in the 6-12 are estimated to be around 4,000t, worth £13m each year.**
- This is less than 2.5% of the total value taken from UK waters by EU vessels
- French vessels accounted for most of these landings (74% by volume, 64% by value) with the remainder landed by Belgian vessels.
- Based on EU over 12m vessel activity (VMS), 38% of these catches by weight are from **Eastern English channel (7d)** and 33% **Southern North Sea (4c)**

EU **>12m** landings from UK 6-12nm are **~£12.4m**

Based on VMS apportioning method, top 10 species by landed value (2021-23 average)



EU **<12m** landings from UK 6-12nm are **~£0.4m**

There is less data for under 12m vessels, so this estimate is based on apportioning ICES areas

What happens to the UK if we stop EU access?

	Impact	Explanation
Profit How is the viability of the UK fleet affected?	Neutral/small positive?	This could lead to an initial reduction of effort in the 6-12nm zone. This reduction in competition in the UK's 6-12 may reduce the effort/cost required to catch the fish – this makes fishermen more productive and therefore more profitable.
Supply chain How is the UK fisheries supply chain affected?	Small negative?	May reduce EU landings into UK ports, but maximum possible amount EU land into UK ports from 6-12 is already less than 1% of total landings into UK, by both value and volume
Sustainability How is the abundance of fish affected?	Neutral	Overall amount of fishing remains the same overall, a reduction in pressure on the 6-12 would be offset by a displacement to the 12-200
Non-compliance and conflicts How would vessels respond to restrictions?	Large negative initially, medium positive long term	Reduced UK/EU gear conflicts in the long term. Risks that EU vessels could ignore new restrictions and increased conflict with domestic fleet.
Stakeholders How would UK fishermen react	**Large positive**	Clear deliverable. In line with some industry expectations

More details in annex

Profit 1 of the catching sector

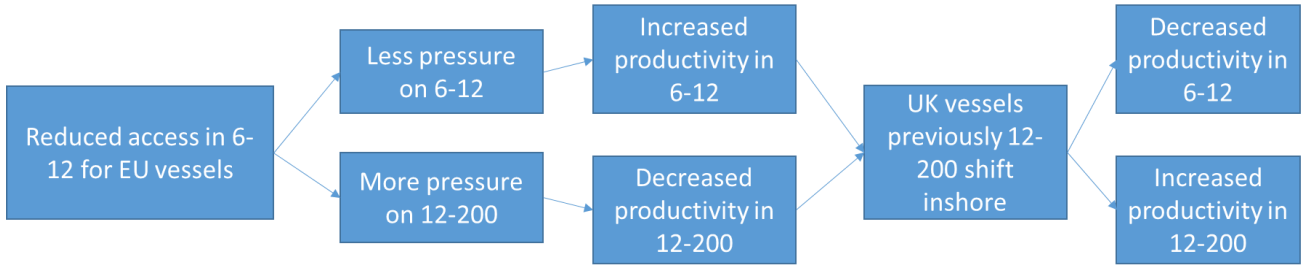
Profit is defined as the difference between revenues and cost, and, as such, any impact on price, sales or cost will affect profit.

Changing access could affect profit through the intensity of activity in the 6-12 and the effect on fish biomass.

The effect on profit for the UK fleet, if any, will depend on:

- Whether EU vessels in 6-12 means more effort for UK vessels
- The impact of EU vessels being displaced to the 12-200
- How close to the 12nm line EU vessels fish when access is revoked
- The impact revoking access on prices

Currently there is no data to describe the above factors.



Profit 2

Option	Potential implications	Profit effects
No access	Reduction of activity in the 6-12.	If UK vessels currently have to exert more effort due to competition from EU vessels, removing EU vessels should: • Reduce the effort required for a given catch • Allow for a greater catch for a given level of effort • Increase profits • But this could be counteracted by reduced profits in the 12-200. If presence of EU vessels is not affecting effort for UK vessels, impact on profit will be negligible.
Reduced competition	Reduction of activity in the 6-12 on a smaller scale.	If 'reduced competition' properly defined, the effect on profits should be as per the 'no access' option. Where you allow the EU access, there should be no competition, so no impact on effort and therefore profit.
Increased access	Increase in activity in the 6-12.	If the increased access creates more competition with UK vessels, this will drive up costs and reduce profits. If the increased access is for stocks where there is no competition, there should be little impact on profits.

Profit 3 - When is reducing access good for profits?

Dependencies for a positive impact on profits:

- UK vessels are currently in direct competition with EU vessels and are forced to use more effort.
- UK fleet doesn’t increase activity in the 6-12 to above current levels.
- The UK fleet operating in the 6-12 has spare quota to utilise the increased fishing opportunities resulting from EU vessels leaving
- The UK fleet in the 12-200, where EU vessels will be displaced to, isn’t at risk from competition from EU vessels.
- It’s more difficult for consumers/producers to switch from UK-landed products to imports (e.g. live/fresh).

Supply chain 1

How could changing access affect local supply chains, such as ports, fish markets and processors.

This depends on how 6-12 access affects total landings into UK ports. As stated in the data limitations, we do not know what was landed in the 6-12. We therefore don't know what was landed into UK ports from the 6-12.

What does the data show about landings into ports?

- EU landings into UK ports for some species is lower than the amount caught in the 6-12 rectangles by these countries → Impossible for all 6-12 rectangle landings to have been landed into UK, so some is landed abroad
- Nations that do not have 6-12 access still landed into UK ports (e.g. Spain, Sweden). So 6-12 access is not essential for willingness to land into UK
- The maximum percentage of landings into the UK from the 6-12 is estimated at 1% by value and volume…

Supply chain 2

The maximum percentage of landings into the UK from the 6-12 is estimated at 5% by value and volume…

Methodology

Uses MMO foreign landings into UK ports data, which is broken down by member state and species.

To work out maximum that could have come from 6-12:

- Filter for catches within the UK EEZ
- For each species, flag whether that country could have landed that species anywhere in the 6-12
- So for France, which has all-species access in the channel, all French landings into the UK are included
- For Belgium, include only their demersal landings
- Total these landings and take as a percentage of the total landed into the UK
- Should be apparent that this is likely to be an overestimate. It includes 12-200.

Supply chain 3

Option	Potential implication	Supply chain impacts
No Access	Landings into the UK may fall. The extent to which will depend on: • The market for the species in the UK • Whether the species will be sold fresh and the tolerance for delays in getting the product to market in the UK • Difference in sale price between UK and mainland Europe. Higher UK price needed to encourage landings into UK.	As above, maximum of 1% fall in landings to UK ports. If UK port landings make up large proportion of market, prices rise. The extent to which this will be passed on to processors, retailers and consumers depends on preferences and availability of alternatives, and amount exported after landing.
Reduced competition	Reduced landings of those species where there is competition with the UK fleet.	As above. We can't say that the impact will be lower, since we don't know which species are being landed in the UK vs abroad from the 6-12.
Increased access	Increased activity in the 6-12. Possible increased landings into UK ports.	Reduced prices at quayside. Reduced costs/prices along value chain.

Sustainability 1

Changing access could mean changing the intensity of fishing in certain areas of the 6-12 and 12-200.

Displacing current fishing activity might elevate pressure on stocks in a certain area, but, increase pressure elsewhere .

Option	Potential implication	Sustainability impacts
No Access	Reduced overall activity in the 6-12. EU vessels fishing in 6-12 increase activity in 12-200.	Reduced pressure on fish stocks in the 6-12. Increase in activity beyond the 12.
Reduced competition	Reduced overall activity in the 6-12 on a smaller scale. EU vessels fishing in 6-12 increase in 12-200.	Reduced pressure on fish stocks in the 6-12 on a smaller scale. Increase in activity beyond the 12 on a smaller scale.
Increased access	Increase activity in 6-12 and potentially 0-6.	Increasing pressure on stocks in the 6-12 especially non-quota.

Sustainability 2

Dependencies for positive impact

- Compliance – both of LFC vessels respecting changed access rights, and of domestic vessels not being deliberately non-compliant due to frustration with the outcome of EU Exit.
- Limited replacement fishing to overall lessen the pressure on stocks
- Any access criteria are based on improving the likelihood of good environmental outcomes (better monitoring and compliance, or more selective gear.
- A slow reduction of access over time (ie. five or ten years) would give the LFC states who currently use the 6-12nm zone time to adapt, and could subdue the frustrations of UK vessels at not regaining the 6-12 all in one go.

Noncompliance and conflicts at sea 1

Changes to access for the 6-12nm zone could have two different types of cost:

- An increase in non-compliance, i.e. from LFC vessels who have previously had access ignoring that they no longer have it. MMO's costs for surveillance vary depending on how much surface surveillance is needed, and therefore an increase in noncompliance represents a cost to them.
- Costs associated with conflicts at sea, in terms of destruction or harm of vessels, or injury to fishing vessel crew.

Option	Potential Implications	Non – compliance impacts
No Access	EU vessels lose access to 6-12.	Risks that EU vessels could ignore new restrictions. Increased conflict with domestic fleet. Increased conflicts on 6-12 limit.
Reduced Competition	EU vessels lose access to certain parts of 6-12.	Some initial risk of conflict by domestic fleet against OMS vessels. Increased risk of flare ups/sustained conflict if OMS vessels found not to be compliant.
Increased MS access	EU vessels gain access to parts of 6-12.	This is likely to result in active action being taken by the domestic fleet to protect 'their' waters and resources.

Non – compliance and conflict at sea 2

Dependencies for a positive impact:

- Generally cordial relationships between UK and EU/LFC fleets.
- Early presence of MMO vessels in hotspot areas, particularly the English Channel to show deterrence.
- Domestic fleet having a tangible benefit for any agreed changes.
- LFC vessels easily able to change their business models and move their fishing into other areas and don’t feel a keen sense of loss.

Stakeholders 1

How might industry react?

- From previous papers on this issue it's clear that industry views are mixed depending on area, but the common message is an expectation of reduced access. This is dependent on what this means for quota and trade restrictions.

- Some views are that:
  - Existing conflicts mean 0-12 access should exclusively be for UK vessels.
  - Reduction over time is reasonable to allow EU vessels to adjust.
  - Some evidence of "economic link" to UK ports should be demonstrated.
  - Access should be up for negotiation annually.
  - Trade with EU is important – reducing access should not jeopardise this.
  - Access should only be given when UK receives higher share of quota.

Stakeholders 2

Option	Potential Implications	Stakeholder impacts
No Access	No EU vessels fishing in UK's 6-12. No additional quota. No incentive to reduce trade frictions.	Clear and tangible deliverable. In line with some industry expectations. Those who trade with EU may perceive the action as reckless/harmful. Those expecting additional quota may be disappointed.
Reduced competition	Some EU vessels continuing to fish in UK's 6-12. Some additional quota. Some incentive to reduce trade frictions.	Some may see this as giving up control of UK's 6-12. Difficult to explain where the benefits will be where access is not restricted. Those receiving additional quota more content.
Increased MS access	EU vessels fish more in the UK's 6-12 than they do now. Some additional quota. Some incentive to reduce trade frictions	Perceived as a weakening of UK position by some parts of the industry.

Stakeholders 3

Dependencies for a positive impact

- You can enforce whatever you agree.
- If you make a concession you can link it to a clear gain which benefits the **fishers in that area**.
- Fishermen will likely give more credit if they *feel* they are better off as a result, which will be a combination of economic, and socio-political factors.
- [REDACTED]

Summary

Looking at the dependencies for each of these types of impacts suggests that you are most likely to have a positive overall impact if:

- UK vessels are able to **take advantage** of the reduced overall effort in the 6-12 nm zone by increasing their effort.
- UK vessels are able to access **additional quota**, particularly the quota stocks that EU are currently fishing in the 6-12 (sole, whiting etc).
- The UK is able to **enforce** any changes to the 6-12 nm zone, ideally with presence and deterrence.
- Any changes happen **gradually** allowing both the UK and EU fleet time to adapt and think about new business models.
- We are able to **communicate** clearly changes that are being made now, or how we expect access to change in the future.
- Any access that is agreed has a **clear, tangible benefit** attached.

What we can and can’t say

Data for the 6-12 is severely limited. Where data is available the range of uncertainty is too large to make decisions with

- ✗ How reliant EU are on the 6-12
- ✗ What the UK is catching in the 6-12
- ✗ How many vessels actually use the 6-12
- ✗ Where any 6-12 catches are landed, so can’t follow the supply chain

- ✓ How many EU vessels can use the 6-12
- ✓ How many vessels, over 12m, travelled at ‘fishing’ speeds in the 6-12
- ✓ Total catches from the UK EEZ
- ✓ Estimate landings from the 6-12