

NE SCOTLAND FISHERIES DEVELOPMENT PARTNERSHIP: 11 NOVEMBER 2022

BULLETIN: TONY MACKAY REPORT: FRASERBURGH FISH LANDINGS

1 Reason for report

1.1 To inform NESFDP members

2 Recommendation

2.1 It is recommended that members note this bulletin

3 Discussion

3.1 On 4 October 2022, the prominent economist Tony Mackay emailed Aberdeenshire Council Elected Members and the Economic Development service to share a detailed report he had helpfully prepared on fish landings at Fraserburgh Harbour. Mr Mackay’s covering message advised that he had undertaken the analysis following the recent publication by Marine Scotland of their annual report on Scottish Fisheries Statistics for 2021 which gives detailed statistics on the landings of fish in every port in the country, including Fraserburgh. Mr Mackay went on to suggest that his report was shared with NESFDP members.

3.2 Fraserburgh Harbour was contacted and kindly agreed that the report could be tabled at NESFDP. Mr Mackay’s report is attached as **Appendix 1**. Economic Development is grateful to Mr Mackay for making his helpful analysis available.

4 Council Priorities, Implications and Risk

4.1 This report is relevant to all of the following Council priorities:

| Pillar | Priority |
|-----------------|--|
| Our People | Education Health & Wellbeing |
| Our Environment | Infrastructure Resilient Communities |
| Our Economy | Economy & Enterprise Estate Modernisation |

4.2 The table below shows whether risks and implications apply if the recommendations are agreed.

| Subject | Yes | No | N/A |
|--|------------|-----------|------------|
| Financial | | | X |
| Staffing | | | X |
| Equalities and Fairer Duty Scotland | | | X |
| Children and Young People's Rights and Wellbeing | | | X |
| Climate Change and Sustainability | | | X |
| Health and Wellbeing | | | X |
| Town Centre First | | | X |

5 Scheme of Governance

- 5.1 NE Scotland Fisheries Development Partnership is able to consider this item in terms of its remit to provide a NE Scotland focus to enable issues and concerns across the fisheries and related sectors to be addressed. This includes strengthening economic development links between fisheries science, catching and processing sectors and the wider seafood industry, contributing to regional and local priorities for the fisheries sector, improving links between marine environment and biodiversity and contributing to policy development and consultations.

Alan Wood, Director of Environment & Infrastructure Services

Report prepared by Derek McDonald, Industry Support Executive (Rural & Maritime)

1 November 2022

Appendix 1

A note by Tony Mackay, Economist: Fraserburgh fish landings value up +20%

Marine Scotland have just published their annual report on Scottish Fisheries Statistics 2021, which gives detailed statistics on the landings of fish in every port in the country, including Fraserburgh. The numbers are disaggregated by species, tonnage and value. The value of fish landings at Fraserburgh increased by a massive +20.0% to £29.8 million last year, but the tonnage fell by -1.7% to 14,114. In Scotland as a whole the value of landings in 2020 was up +8.4% but the tonnage down -1.5%. Fraserburgh therefore did much better than the national average by value but a little worse by weight. The value was 6.7% of the Scottish total and the tonnage 5.0%.

Fraserburgh is the 4th biggest fishing port in Scotland, after Peterhead, Shetland and Scrabster. The tables at the end of this note give the statistics for each of the 18 fishing ports/districts in the country. In terms of the 2021 value changes Fraserburgh ranked 11th of the 18. The tonnage ranking was 12th. The value of shellfish landings was just over £20 million, which was 67% of the total and up +44% on 2020. The white fish/demersal value was £8.4 million (28% of the total but down -18%) and the pelagic value £1.4 million (5% of the total and up +93%). The most valuable species landed were nephrops (51% of the total), monkfish (13%) and scallops (7%).

The Marine Scotland statistics show that Fraserburgh landings peaked at £48.2 million in 2018. There was then a massive -46% fall in 2020. The 2021 total is still only 62% of the 2018 peak. The statistics also show a huge decline in the value and weight of mackerel (pelagic) landings. They peaked at £8.9 million in 2017 but fell to just £382,000 in 2020. The 2021 mackerel total of £1.4 million was still only 16% of the 2017 peak. In terms of tonnage, the shellfish total was 7,615 tonnes (54% of the 2021 total and +33% higher); demersal/white fish 5,114 tonnes (36% and down -33%); and pelagic 1,386 (10% and up +45%). The biggest landings by weight were of nephrops (40% of the total).

The Marine Scotland report shows that there were 224 registered fishing vessels at Fraserburgh at 31 December 2021, which was 11% of the Scottish total of 2082 and the second highest number after Shetland (247). Peterhead had only 95 registered vessels. There were 791 registered fishers, who were 19% of the national total. That was by far the highest number in the country and more than double the 370 in Peterhead. The obvious conclusion is that locally registered vessels are landing many of their catches elsewhere, notably in Peterhead. 2021 was obviously a better year for the Fraserburgh fishing industry but the value of landings was still only 62% of the 2018 peak.

The annual report gives statistics on landings by Scottish vessels in Scotland and abroad. The former accounted for 74% of the value of landings by the Scottish fleet in 2021 and 61% of the weight; landings abroad accounted for 26% by value and 39% by weight. The tables on the attached two pages give the landing statistics for each of the 18 fishery districts/ports in Scotland.

The fishery district/port statistics disaggregate the landings by Scottish and non-Scottish vessels, including vessels from abroad and elsewhere in the UK. My comments relate to the total landings in each district/port and not just those by Scottish vessels. The Summary of the Marine Scotland report states that "There are signs that some parts of the fishing industry are recovering from the impacts of Covid-19, however there hasn't been a return to pre-pandemic levels:

- Compared to 2019, whilst there has been an 11 per cent increase in the tonnage landed, the real value of these landings has fallen by nine per cent.
- The long term trend for the value of the fish landed by Scottish vessels has been generally positive since 2016, with 2020 being an exception.
- The 15 per cent increase in real value landed by Scottish vessels between 2020 and 2021 was driven by shellfish and pelagic species.
- The 10 per cent increase in tonnage landed by Scottish vessels between 2020 and 2021 results from an increase in shellfish and pelagic fish landings; Shellfish landings rose 18 per cent by tonnage and pelagic landings rose 14 per cent; Demersal landings decreased by 10 per cent.
- Key species: Mackerel remained the most valuable species in 2021 worth £210 million, making up 37 per cent of the total value of Scottish vessels' landings; Monkfish became the most valuable demersal species and represented six per cent of the total value of Scottish vessels' landings."

Scottish vessels accounted for 90% of the value of total landings in 2021, vessels from elsewhere in the UK (RUK) 7% and foreign vessels 3%. The foreign vessels' share fell from 7% in 2020. Scottish vessels also accounted for 90% of the tonnage landed in 2021, RUK 6% and foreign 4%. Scotland accounted for 62% of the total value of fish landings in the UK in 2021 and 68% of the tonnage.

The report also shows that Scottish vessels landed £393 (70%) of their fish in Scotland in 2021. The other landings were in Norway £114 million (20%), Denmark £21 million (4%), Rest of UK £20 million (4%), Ireland £8 million (1%) and in other countries £6 million (1%). "The number of active Scottish vessels has remained stable at 2,082, increasing by two per cent compared to 2012. The Scottish fleet is dominated by vessels that are ten metres and under in length with a total of 1,573 vessels falling into this category in 2021. There are 509 over 10 metre vessels. In 2021, 4,241 fishers were working on Scottish vessels, down 70 fishers compared to 2020. Since 2013, employment on Scottish vessels has fallen six per cent."

Tony Mackay, 5 October 2022

tony@tonymackay.co.uk

Scottish fish landings statistics 2021

Rankings by value

| Rank | District | £ million | % of Scottish total |
|------|---------------|-----------|---------------------|
| 1. | Peterhead | 172.9 | 39.5 |
| 2. | Shetland | 70.0 | 16.0 |
| 3. | Scrabster | 34.2 | 7.8 |
| 4. | Fraserburgh | 29.8 | 6.7 |
| 5. | Ullapool | 22.3 | 5.1 |
| 6. | Lochinver | 13.1 | 3.0 |
| 7. | Campbeltown | 12.4 | 2.8 |
| 8. | Ayr | 11.1 | 2.5 |
| 9. | Stornoway | 10.9 | 2.5 |
| 10. | Kinlochbervie | 10.2 | 2.3 |
| 11. | Oban | 9.7 | 2.2 |
| 12. | Portree | 8.1 | 1.9 |
| 13. | Orkney | 7.8 | 1.8 |
| 14. | Eyemouth | 6.9 | 1.6 |
| 15. | Mallaig | 4.8 | 1.1 |
| 16. | Anstruther | 4.8 | 1.1 |
| 17. | Aberdeen | 4.4 | 1.0 |
| 18. | Buckie | 3.3 | 0.7 |

Scotland total **£438 million**

Value changes 2020-21

| District | % change |
|-----------------------------|-------------|
| 1. Mallaig | +37.7 |
| 2. Campbeltown | +35.9 |
| 3. Portree | +28.7 |
| 4. Stornoway | +28.5 |
| 5. Scrabster | +25.9 |
| 6. Ullapool | +25.3 |
| 7. Ayr | +24.1 |
| 8. Anstruther | +22.7 |
| 9. Oban | +22.1 |
| 10. Eyemouth | +20.2 |
| 11. Fraserburgh | +20.0 |
| 12. Aberdeen | +18.3 |
| 13. Orkney | +9.3 |
| 14. Peterhead | +6.7 |
| 15. Shetland | -3.4 |
| 16. Buckie | -14.5 |
| 17. Kinlochbervie | -17.4 |
| 18. Lochinver | -25.1 |
| Scotland total value | +8.4 |

Scottish fish landings statistics 2021

Rankings by tonnage

| Rank | District | tonnes | % of Scottish total |
|------|---------------|--------|---------------------|
| 1. | Peterhead | 151.6 | 53.7 |
| 2. | Shetland | 48.8 | 17.3 |
| 3. | Scrabster | 17.3 | 6.1 |
| 4. | Fraserburgh | 14.1 | 5.0 |
| 5. | Ullapool | 11.2 | 4.0 |
| 6. | Lochinver | 9.2 | 3.2 |
| 7. | Kinlochbervie | 5.7 | 2.0 |
| 8. | Ayr | 4.8 | 1.7 |
| 9. | Campbeltown | 4.1 | 1.4 |
| 10. | Stornoway | 2.9 | 1.0 |
| 11. | Orkney | 2.6 | 0.9 |
| 12. | Oban | 2.3 | 0.8 |
| 13. | Eyemouth | 1.8 | 0.6 |
| 14. | Anstruther | 1.4 | 0.5 |
| 15. | Mallaig | 1.4 | 0.5 |
| 16. | Buckie | 1.1 | 0.4 |
| 17. | Portree | 1.1 | 0.4 |
| 18. | Aberdeen | 1.0 | 0.4 |

Scotland total 283,000 tonnes

Tonnage changes 2020-21

| District | % change |
|-------------------|----------|
| 1. Ayr | +29.8 |
| 2. Campbeltown | +23.7 |
| 3. Aberdeen | +19.5 |
| 4. Scrabster | +13.6 |
| 5. Eyemouth | +13.6 |
| 6. Ullapool | +13.3 |
| 7. Stornoway | +13.0 |
| 8. Oban | +12.2 |
| 9. Anstruther | +10.7 |
| 10. Portree | +10.5 |
| 11. Orkney | +2.6 |
| 12. Fraserburgh | -1.7 |
| 13. Peterhead | -1.7 |
| 14. Mallaig | -5.7 |
| 15. Shetland | -9.3 |
| 16. Lochinver | -14.6 |
| 17. Kinlochbervie | -15.0 |
| 18. Buckie | -20.1 |

Scotland total tonnage -1.5%