The Price of Fish?

Supporting the seafood industry for a sustainable, profitable future
The next time you tuck into your fish and chips or pick up a piece of plaice at the supermarket, please spare a thought for the men and women who catch the fish and the families who wait at home for their safe return.

Fishing remains the UK's most dangerous peacetime occupation. In 'Images of Fishermen' author Bui Tyril provides a vivid description of what he calls 'no ordinary job':

"Heaving and rolling at the mercy of the ocean while working under immense pressure, often on wet and slippery decks with gears grinding, winches turning and ropes hauling..."

The threat of death and serious injury is ever present.

At the Royal National Mission to Deep Sea Fishermen (the Fishermen’s Mission) we are only too aware of the price men and women pay to put fish on our plates.

Seafood is one of the world's most valuable natural resources. Today, it has become the most widely traded of all global resources in a world needing more seafood than ever before.

Our ability to feed a hungry world is one of the biggest issues of the new century. The seafood industry recognises the need to deliver a profitable and sustainable future for everyone involved in the seafood chain, from fishermen through to consumers.

The menace to the potential to help feed our fast-growing population, with new developments in aquaculture constituting alongside wild catches.

The UK seafood industry is a world leader in effective fisheries management. We must ensure that the views of every sector of the seafood industry are properly represented in the debate around the Marine Bill, so that the health benefits of seafood and its socio-economic importance are respected alongside a sustainable marine environment.

It is our absolute individual and collective responsibility to provide leadership in the efficient harvesting of those resources on which the seafood industry depends. This responsibility extends to the protection of marine ecosystems and the sustainable use of our marine resources.

And since 1881 we have made it our business to provide emergency and welfare support to fishermen and their families.

It is our privilege to work with these unsung heroes to whom we all owe a debt of gratitude. We should never forget the price that our fishermen and their families pay to put fish on our plates.

The true price of fish

One of the world’s most valuable resources

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Bui Tyril, from ‘Images of Fishermen’
Fishing at sea is probably the most dangerous occupation in the world: an estimated 24,000 deaths occur each year.

This page when fishermen could go to sea in any vessel, fish where and when they wished, and catch as much fish as they could catch have gone forever — the dangers of fishing remain as great today as they have always been.

According to the Marine Accident and Investigation Review, the UK fishing industry experienced 186 fatal accidents between 1992 and 2006. These accidents resulted in the death of 256 fishermen, with nearly a third of these fatalities attributed to fishermen going overboard.

The average rate of 126 deaths per 100,000 fishermen each year is many times higher than that for other areas within the UK workforce.

With over 300 accidents involving fishing vessels reported in 2007, safety and training are vital.

What can be done to make fishing safer?

Training

All fishermen complete basic safety training in sea survival, fire fighting, first aid, health and safety and safety awareness. In addition, skipper, mates and engineers working on larger vessels are required to hold statutory Maritime & Coastguard Agency (MCA) Certificates of Competency.

Risk assessment

Safety awareness training provides fishermen with an understanding of risk fundamentals.

Continued improvements in risk assessment contribute to the reduction in the number of accidents that lead to injuries and fatalities.

Vessel surveys and inspections have now become standard for all fishing vessels.

Life saving appliances

Personal Floatation Devices (PFDs) are still one of the most important forms of lifesaving equipment.

Personal Locator Devices are now readily available to provide fishermen with a means of being found.
UK fishermen are subject to a fatal accident rate 24 times higher than construction workers.
European fisheries are a vital source of food for the country and our trading partners. Our seas provide employment, recreation and economic support for rural communities – and fishermen play a vital role in the stewardship of the marine environment.

Since the 1960s, successive waves of legislation, controls on fishing effort and voluntary codes of conduct by fishermen have provided a framework for the responsible management of our ocean resources. The fishing industry welcomed the advent of the Marine Bill for the further clarity it will bring to the management of our marine environment.

Gear Technology

Most fisheries are based on a mixture of species. Much work has gone into creating gear that targets our most valuable species – ‘target’ or near-quota species of fish that fishermen want to catch – and also reducing the impact of fishing gear on the environment. This country leads the practice of discarding stopped, and has a vested interest in making all marine stocks managed sustainably.

New gear technologies that can target certain species and avoid the capture of others are being introduced. Scientists and policymakers in the early years of the 20th century saw the benefits of creating ‘tasked’ or ‘purse seine’ gear that would target a particular species of fish, while minimizing ‘by-catch’ – species of fish, such as shellfish, that are not wanted. This work is continuing today, but on a larger scale, and also reduces the impact of fishing gear on the marine environment. This country leads the practice of discarding stopped, and has a vested interest in making all marine stocks managed sustainably.

Case Study: The Tresivis Box

The Tresivis Box was created as a result of dialogue between fishermen and policymakers in the early years of this century. It is now a 3,600 square mile area officially closed to fishing. Fishermen from South West England, Ireland, France and Belgium agreed to the closure of the area because they wanted to create a sustainable future for Alaska with as few cod, halibut, whiting and whiting.

Since 2005, the area has been closed every February and March to allow fish to spawn. Fishermen are already reporting increased numbers of cod throughout the year, and scientists from the Centre for Environment, Fisheries and Aquaculture Science (Cefas) have confirmed that the closures are likely to lead to improved fish stocks in the area.

How Fishing is Helping

Measures introduced to reduce fishing impacts include:

• Minimum mesh sizes and minimum landing sizes.

The smaller the mesh on a net, the more fish are caught. Minimum mesh sizes for codfish were reduced, for instance, have increased from 90mm to 120mm in recent years. Similarly, minimum landing sizes in the UK arestringently enforced to ensure that no juvenile fish reach the food chain in this country.

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Case Study: The Wash

By the middle of the 1990s, shellfish stocks in the Wash were at crisis point. Overfishing and low recruitment rates meant that cockles and mussels were in danger of disappearing for good.

In 1996, Cefas recommended a recovery plan – and fishermen took a very positive move by closing their suction dredge fishery and only working shellfish beds by hand to protect juvenile stocks. This was followed by an agreement to reduce discards from the cockle fishery, reduce daily quotas and limit suction dredging to sandy seabed.

In return, the fishermen found that they had gained a willing partner in Natural England, who, in 2006, agreed to support a 1,400 tonnes dredge-based mussel fishery in a previously restricted area of the Wash. This was the first time this area of the seabed had been fished for over a decade.

As a result of these steps taken in partnership, the Wash shellfishery is now ranked as ‘recovering’ – demonstrating that sustainable fishing and conservation can go hand in hand.

The UK has more fisheries certified as sustainable by the MSC, or in the process of certification, than any other nation.

Leadership in sustainability

The Marine Stewardship Council (MSC) is the internationally-recognized standard for certified sustainable seafood. Set up in 1997 to recognize and reward sustainable fishing, the MSC is an independent, market-based fishery certification and eco-labelling programme based on collaboration, credibility and rigour.

The UK fishing industry is sending out a very positive message to consumers on the value of sustainability. For instance, more than half of Scotland’s fisheries (by value) are at some stage in the assessment process and an ever-increasing number achieving certification – and there are more throughout the UK.

These fisheries exemplify the leadership that is transforming this global seafood industry onto a sustainable footing for the future.

SIMON EDWARDS, MARINE STEWARDSHIP COUNCIL
Fisheries are subject to government controls to conserve stocks and prevent overfishing. Controls on these fisheries are based on regular monitoring and assessment of the status of individual stocks, conducted by independent and government-based scientific organisations. In recent years, some seriously depleted stocks have become the subject of emergency measures and recovery plan proposals. On the back of scientific advice, stocks are now managed through output measures such as Total Allowable Catches (TAC) and quotas which limit how much fish can be landed, technical measures (mainly mesh sizes and minimum landing sizes) and limits on the number of days boats can spend at sea, in addition to closed areas and closed seasons. There’s no denying that there are serious problems in some major fisheries around the world but it is important that the broader picture on global fish stocks is viewed correctly. Recent technological developments mean fishermen have become better at catching targeted fish species. Against this background, we should remember that the number of fully exploited fisheries has not increased significantly for ten years. Change doesn’t stop there. There are also changes at the retail end. Whilst the UK seafood market is growing and is now worth £5.4 billion, the increasing diversity of consumer tastes means that the catching sector can continue to fish sustainably for a wide variety of species. Consumers in the UK are increasingly switching to less well known species of seafood such as pollack and sea bass, and they are looking for more local and sustainable sources such as pilchards and sprats in South West England, langoustines in Scotland and mussels in Wales. In short, the combination of further economic benefits and the sustainability of capture fisheries can only be achieved through fisheries management that is able to avoid overexploitation, to maintain (or rebuild) fishery resources, and to improve the commercial viability and generation of wealth from capture fisheries. The UK seafood industry is changing. Fishermen will be at the centre of any fisheries management schemes and will recognise the responsibilities of their stewardship role. The number of over exploited fisheries has not increased for the last ten years. Change doesn’t stop there. There are also changes at the retail end. Whilst the UK seafood market is growing and is now worth £5.4 billion, the increasing diversity of consumer tastes means that the catching sector can continue to fish sustainably for a wide variety of species. Consumers in the UK are increasingly switching to less well known species of seafood such as pollack and sea bass, and they are looking for more local and sustainable sources such as pilchards and sprats in South West England, langoustines in Scotland and mussels in Wales.
the fishing industry has faced many challenges over the last few years and more recently balancing fleet size to the total allowable catch for most species. This process started in the early nineties, when it was clear the fleet was too large for the quota available. When the quota was fixed and shared equally amongst the fleet, they were not sufficient for individual vessels to fish viably or sustainably. so the industry started the process of fleet reduction. there were also fewer fishermen left to purchase the quotas from those leaving the industry.

we are custodians of the sea

This was not an easy time for the industry as the spend on quota reduced the amount we could invest in renewing or modernising vessels. however, we also realised that this was the only course open to us if the industry was to survive. in recent years, we have been working much more closely with the scientists as we know this will achieve the best results both for stock levels and for the industry. we now regularly take scientists to sea to help with data collation.

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this ethos of partnership working has spread throughout the industry with many fishermen also getting involved in the marketing of what we catch to achieve the best price for the fish – both for ourselves and for the customer.

as fishermen, we see ourselves as custodians of the sea. it’s part of our job to look after the marine environment by helping the scientists, taking in the rubbish that we catch in our nets and minimising the impact we have on the ocean. we also realised that if we took responsibility for this, the fishermen who leave the industry would be helped. we are trying to close the gap between our net profit and the public perception.

importantly though, we have a great pioneering spirit within the industry, which binds us together as fishermen and communities. we will continue to work towards a better future for all of us on this island of ours – and are already a long way towards achieving this.

DAVID STEVENS, RESPONSIBLE FISHING SCHEME SKIPPER

Global production from marine fisheries has remained stable during the last decade.

Global production from marine fisheries has remained stable during the last decade and the proportion of overexploited and depleted species has changed little. un statistics indicate annual catches fluctuating between 81 and 87 million metric tonnes since before 2000 and projections suggest future catch levels at similar levels.

in the northeast atlantic, recent annual catches have declined slightly but remain close to 10 million metric tons, and UK landings levels are now close to 550,000 metric tons. catches of many species groups in this region are stable but the condition of some stocks is of concern.

DR BILL KARPI, NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION
World stocks of wild seafood species are under increasing pressure. Globally, the total consumption of fish has increased. For example, in 1973 to 110m tonnes by 2006. Consumption is expected to increase further but will differ by region according to population dynamics and changes in income, affordability of seafood, and changes in diets and tastes.

Aquaculture and capture fisheries currently supply the world with approximately 110 million tonnes of fish, or 16.7kg per capita per year, for human consumption. Overall, fish now provides at least 15% of the animal protein intake for approximately 2.9 billion people.

For the first time aquaculture has the capacity to provide half of all fish consumed worldwide. World population is also expanding and is expected to increase to 7.6 billion by 2020 and 9 billion by 2050. The United Nations forecasts that by 2030, fish food production will need to increase to around 130 million tonnes, making it all the more important to ensure that fish stocks are managed to provide for future demand.

In 2006, an estimated 43.5 million people were directly engaged, part-time or full-time, in primary production of fish either in capture from the wild or in aquaculture. For each person employed in the primary sector, it is estimated there could be four employed in the secondary sector (including fish processing, marketing and service industries), amounting to 170 million in the whole industry. Taking account of dependants, an estimated 520 million people rely on the sector—nearly 8% of the world population.

"Food security" is "a condition when all people, at all times, have physical and economic access to sufficient, safe and nutritious food to meet their dietary needs and food preferences for an active and healthy life."

FAO UN, 1996

Food and Agriculture Organisation of the United Nations

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**World Population from 1950 to 2050 (projected)**

Fisheries can create wealth for local economies and contribute to food security whilst demonstrating sustainable production techniques.

For consumers, purchasing seafood is a complex decision with price, taste, and familiarity being important. In the current economic climate, consumers need to be reassured that the seafood they are buying is good value in comparison with other proteins.

Many consumers have limited knowledge about the industry issues of catching method, stock status and the complex supply chain. For such consumers, there is a need to deal with all of these factors in a straightforward manner. Eco-labels, provenance and product traceability are used to distinguish products and reassure buyers that the marked value of their fish is not compromised by negative images of overfished stocks and environmental degradation.

Between 1974 and 2006, purchases of fish in UK households increased by 38%, with a report from Defra in 2007 estimating UK seafood consumption at £8.8 billion per capita. Salmon, tuna, cod and haddock remain the most popular species with UK consumers.

The seafood industry recognises the need to work with international organisations to establish a workable management system. The future will be challenging, but fisheries can create wealth for local economies and contribute to food security whilst demonstrating sustainable production techniques – as the recent increase in certification schemes demonstrates.

THE PRICE OF FISH: THE FUTURE OF FOOD

For a moment to reflect on the modern world and the way we live. We exercise less, we eat more prepared foods and the population is growing in size. What would be one thing we could do to create some balance in all this? Start to eat more fish than you did before.

Mitch Tonks, Celebrity Chef

Grilled to perfection

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Anyone can cook a great piece of fish in minutes. It is quick, easy and packed with nutrients which benefit our health. I can’t think of another food this good - or enjoyable. Why aren’t there queues at fish counters and fishmongers across the country? It beats me!

Mitch Tonks, Celebrity Chef

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Seafood is a multi-billion pound industry to the UK. In this country, four out of five households consume seafood at least once a month.

Recent surveys and reports have revealed that the overall economic importance of the fishing and seafood processing sectors is much greater than the sales values of each sector:

- The UK fishing industry employs around 13,000 fishermen working on 4,500 active vessels.
- The 2008 Seafish survey of the processing sector found that the UK fish processing industry provides 14,700 full time jobs in 480 units.
- UK vessels landed 610,000 tonnes of sea fish (including shellfish) in 2007, with a value of £645 million.

If the UK fish catching sector were to be removed entirely, the impact on the UK economy would be as follows:

- GDP would decrease by around £700 million.
- Around 28,000 full time jobs could be lost throughout the wider economy.

The price of fish:

Total consumer purchases of seafood in the UK exceeded £5 billion in 2007.
The UK processing sector depends, to a large extent, on supplies of imported fish and has a larger overall value than the catching sector. If the fish processing sector were to be removed entirely, the impact on the UK economy would be:
- GDP would decrease by around £4 billion
- Around 125,000 full-time jobs would be lost throughout the wider economy.

In Scotland, the region in which fishing has the largest presence, the impact of removing all fishing and fish processor sectors would reduce Scottish GDP by around 1%.

Supply: an increasing proportion of raw materials for processing is imported into the UK. This trend has been apparent for a number of years but the rate of increase is slowing.

Sales: 2008 Seafish survey of the UK fish processing industry shows an increasing proportion of processed sales being made to multiple retailers.
- The UK imported 782,000 tonnes of seafood at £2.2 billion in 2008
- 415,000 tonnes of seafood were exported from the UK in 2008 with a value of £1.2 billion
- 137,600 tonnes of frozen seafood were sold in the UK retail sector in 2008 for £274 million, a 6% increase in value and a 3% increase in volume compared to 2007.

**Orkney without fishing?**

All but two of Orkney’s 18 inhabited islands support commercial fishing. The Shetland fleet in particular has a major impact on the local economy. Each year, around 150 vessels land 2,600 tons of brown crabs, 1,060 tons of north sea lobsters and 610 tons of skate. This activity employs around 220 fishermen with another 190 employees on shore-based processing operations –

Orkney is widely recognized as one of the premier smart processing areas in Europe. But the entire benefits to the economy are significant, including the employment of those who support the industry and transport. Orkney without fishing is indefensible to imagine.

STEVEN CROCKETT, ORKNEY FISHERMEN’S SOCIETY

“**Fish is the best recession food**

I’m a fish missionary – some people call me Austin Haddock. I’m also the MP for Grimsby, Britain’s premier seafood producer.

A hungry world wants more and the competition for catches increases. Sadly though, the British share is down.

The answer is to use our brains (and eating fish can help with that too), let’s develop new seafood dishes and market them more vigorously – both through premium retailers and discounters, whose market share is rising.

Fish is the best recession food. It makes you happy and healthy. So eat up – you’re not only enjoying yourself, you’re supporting nearly 13,000 fishing jobs.”

AUSTIN MITCHELL MP, GREAT GRIMSBY
Why do sports stars eat fish?

We’re always wondering how to reduce our weight without the drag of a diet. Plus, we still want flavour, texture and the feeling of being topped up with energy. There is a solution: seafood.

The range of seafood available in the UK is phenomenal and our coastline is the envy of many countries. Also, you’ll never meet a professional sports person who does not use fish as an integral part of their nutritional intake. With so much goodness, it’s a simple recipe for healthy living.

Sports stars eat fish because it tastes great and is good for you. More people should catch on to this.

MATT DAWSON, FORMER ENGLAND RUGBY INTERNATIONAL & WINNER OF CELEBRITY MASTERCHEF 2006

Seafood and Health

Seafood is good for every part of the body – from hair to heart. The UK Committee on Advisory Nutrition has recommended that all adults eat at least two portions of seafood every week, at least one of which should be fish. This is entirely supported by the Royal Society for Public Health, the British Heart Foundation and the British Nutrition Foundation.

Seafood is the best natural source of Omega-3 oils, which are particularly beneficial to heart health. They are also necessary for brain development, joint function and healthy skin. Recent research shows that the range of fish and shellfish containing high concentrations of Omega-3 oils is wider than previously realised. For instance, research has shown that mussels and crab have emerged as key sources – good news for those who are not keen on stronger-tasting fish.

Protein-rich seafood also provides a wide range of vitamins and minerals that have important functions in the body. These include:

- Fat-soluble vitamins can lead to fatigue
- Zinc - bolsters the immune system
- Iron - deficiency can lead to fatigue
- Selenium - supports the immune system and is believed to have anti-cancer properties
- B vitamins - responsible for converting food to energy in cells
- Iodine - good for growth
- Vitamin A - essential for healthy eyes, skin and hair
- Vitamin D - promotes healthy bones and teeth
- Vitamin B12 - promotes healthy bones and teeth

The latest research on the benefits of seafood strongly suggests that seafood can improve mental health, reduce the risk of diabetes, and dramatically cut the risk of repeat events in heart attack and stroke victims.

Seafood – and eat it

It’s not often that health experts encourage us to eat more of something that tastes great. That’s why seafood is such a wonderful exception. Seafood is the ultimate fast food – most dishes are quick to prepare – and it’s amazingly versatile. So why not head for the fish counter more often? Nutritionists recommend we eat two portions of fish a week, one of which should be oil-rich. Whitefish and shellfish contain a wide range of vitamins, proteins and minerals too. Seafood tastes delicious and can be a joy for you. Put a fish on your plate today!

JULIETTE KELLY
NUTRITIONAL ADVISOR

1 “Seafood and Health” conference proceedings, 20th January 2009

THE PRICE OF FISH:

Seafood

Seafood is good for every part of the body – from hair to heart. The UK Committee on

Advice on Nutrition has recommended that all adults eat at least two portions of seafood every week, at least one of which should be fish. This is entirely supported by the Royal Society for Public Health, the British Heart Foundation and the British Nutrition Foundation.

Seafood is the best natural source of Omega-3 oils, which are particularly beneficial to heart health. They are also necessary for brain development, joint function and healthy skin. Recent research shows that the range of fish and shellfish containing high concentrations of Omega-3 oils is wider than previously realised. For instance, research has shown that mussels and crab have emerged as key sources – good news for those who are not keen on stronger-tasting fish.

Protein-rich seafood also provides a wide range of vitamins and minerals that have important functions in the body. These include:

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The 2002 CFP reforms, and in particular the establishment of the Regional Advisory Councils (RACs), began to provide the means for fishermen’s voices to be heard and be taken fully into account. This was an important step forward in participative decision making but we should not delude ourselves that we have arrived at the final destination. RACs may provide stakeholders with a much stronger voice than previously but that voice is still heard within a system prone to prescriptive, one-size-fits-all, micro-management.

The next reform of the CFP is scheduled for 2012. Already it is possible to see the emergence of two separate and in many ways contradictory themes. On the one hand, the strengthening of the prescriptive, micro-management approach, now underpinned by modern technologies such as electronic logbooks and VMS; on the other, an entirely new approach, in which a framework of broad principles and standards for fishing sustainably are laid down, and the fishing industry is given responsibility to determine how those criteria are to be met.

It is this latter approach that offers a real, if not yet perfect, path away from the spiral of policies that repeatedly fail to deliver their promise and towards a framework that allows grass-roots initiatives to thrive within a system of self-regulation. Of course, much remains to be done before the new approach can be implemented. Once the broad principles and standards are laid down (after full consultation with the RACs) the key will be management plans, prepared by industry groupings in conjunction with fisheries scientists. These plans will detail how each group of vessels will operate in conformity with the broad sustainability standards for the next five years or so. The grouping will produce the documentation that will allow the plans to be externally audited.

It is within this framework that the kind of initiatives that have emerged in the UK in recent years could find full fruition. Much, of course, remains to be done. First, the European Commission, the Council of Ministers and possibly the European Parliament, will have to be persuaded to abandon the command and control approach in favour of a framework within which self-regulation can thrive. Ways of co-ordinating micro to macro will have to be developed. I believe the time has come for this approach.

Barrie Deas
Chief Executive
National Federation of Fishermen’s Organisations
Contacts

Centre for Environment, Fisheries and Aquaculture Science (Cefas)
www.cefas.co.uk

Defra for Environment, Food and Rural Affairs (Defra)
www.defra.gov.uk/marine

Fisheries Research Services, Aberdeen
www.marlab.ac.uk

Food and Agriculture Organisation of the United Nations
www.fao.org/fishery/en

Marine Accident Investigation Branch (MAIB)
www.msh.gov.uk/home/index.cfm

Maritime and Coastguard Agency (MCA)
www.mcga.gov.uk/c4mca/mcga07-home

Marine Conservation Society (MCS)
www.mcs.org.uk

Marine Stewardship Council (MSC)
www.msc.org

National Federation of Fishermen’s Organisations (NFFO)
www.nffo.org.uk

National Oceanic and Atmospheric Administration (NOAA)
www.noaa.gov

Orkney Fishermen’s Society
www.orskney.co.uk

Responsible Fishing Scheme (RFS)
http://rfs.seafish.org

Royal National Mission to Deep Sea Fishermen
www.fishermensmission.org.uk

Scottish Fishermen’s Federation (SFF)
http://rfs.seafish.org

The Scottish Government Marine Directorate
www.scotland.gov.uk/topics/Environment/Themes/Seafoods

Seahorse Restaurant
www.seahorserestaurant.co.uk

Seafish
www.seafish.org

Seafood Information Network (SIN)
http://sin.seafish.org

Shellfish Association of Great Britain (SAGB)
www.shellfish.org.uk