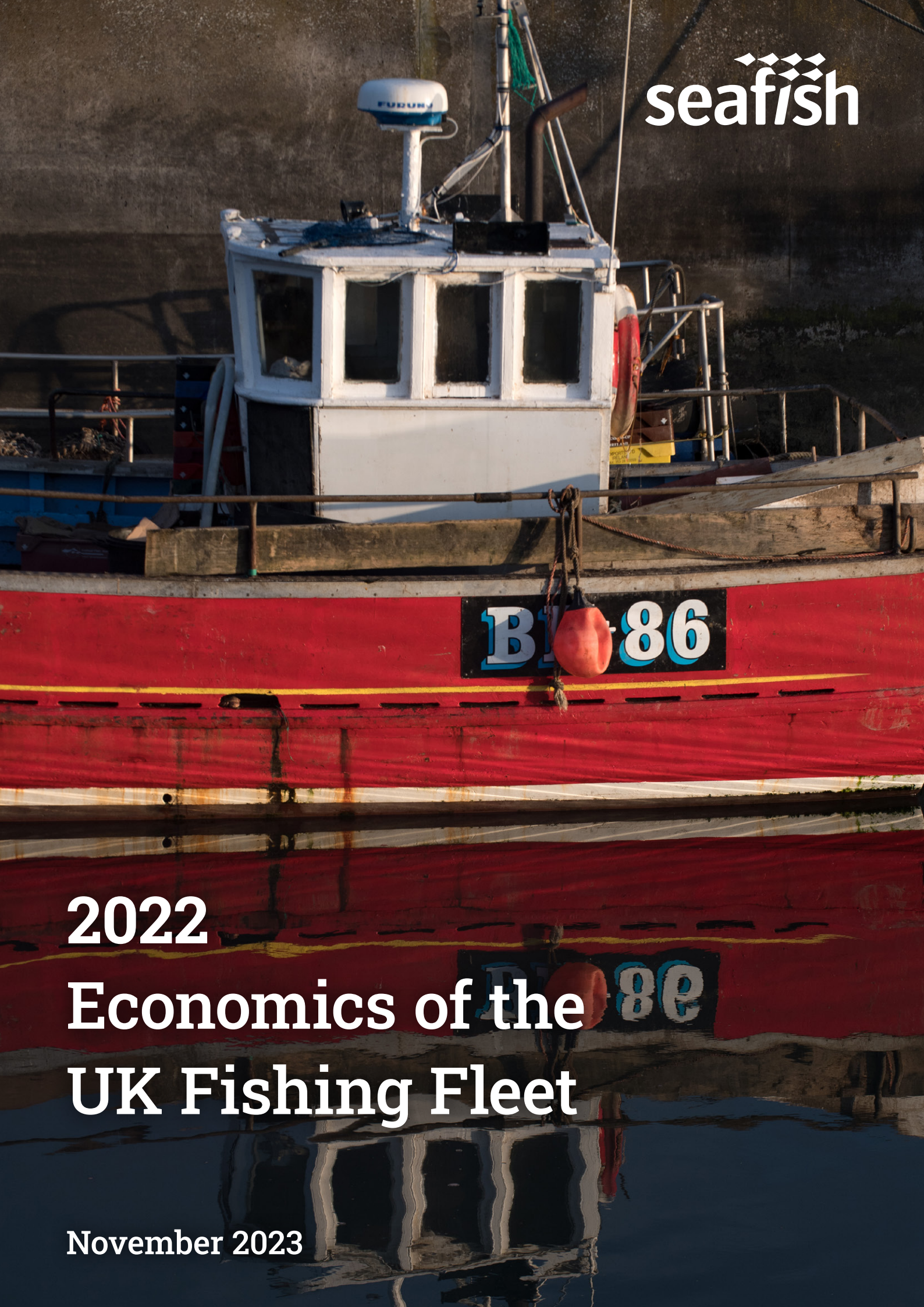

seafish

2022 Economics of the UK Fishing Fleet

November 2023

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Executive summary

- The years 2021 and 2022 were extremely challenging for the UK fishing fleet. The lingering effects of Covid-19 and associated lockdown measures continued to be felt into 2021, combined with the new trade requirements after the EU exit. There were indications of recovery by the second half of 2021 but in 2022 the start of the Ukraine war, and its consequences on the energy and oil markets, created a new shock for the fleet.
- The fleet began to recover from the economic shock of Covid-19 in 2021, with higher levels of fishing activity and higher prices once markets reopened and demand began to grow. Total fishing income and operating profit increased this year compared to 2020, although they were still 8% and 4% below 2019 figures, respectively.
- The key development that impacted the fleet performance in 2022 was fuel price. The increase in oil prices following the Ukraine war saw the average price of marine fuel in the UK reach £1 per litre, a record high never seen before. The fleet's total expenditure on fuel in 2022 reached £195 million, a 75% increase from 2021 and the highest figure since Seafish began reporting on the financial performance of the fleet.
- The impacts of high fuel prices were partially offset by higher average prices for the catch. Total fishing income of the fleet in 2022 was nearly £1 billion, 11% higher than in 2021 and a figure similar to that of 2018. Higher average prices were driven by key species for the UK fleet such as Nephrops, cod and brown crab.
- Total operating costs of the UK fleet were £802 million in 2022, a 19% increase from 2021 and 7% higher than in 2019, pre-pandemic. These are preliminary estimates: the impact of increased fuel costs on crew expenditure and other costs items will be confirmed once 2022 financial data becomes available in early 2024.
- Higher landing prices could not completely compensate for the high fuel bill. The forecasted total operating profit of the fleet was £222 million in 2022, a 13% decrease from 2021 figures. For comparison, in 2019 the total operating profit of the fleet was £267 million.
- The total weight landed in 2022 was 619 thousand tonnes, which was similar to 2019, 2020 and 2021 figures. Landings of pelagic species represented nearly 60% of all landings (by volume) in 2021 and 2022, up from 50% in 2019.
- The active fleet has decreased in size at an average annual rate of 3% since 2019, to a size of just below 4,080 vessels in 2022.

Introduction

This is the sixteenth edition of this annual report providing insights into the financial and operational performance of the UK fishing fleet in 2021 and 2022. Accurate fleet economic data and analyses help inform decisions and enhance fisheries management.

The report presents economic estimates at UK, home nation and fleet segment level. The estimates are calculated based on samples of fishing costs and earnings gathered by Seafish as part of the 2022 Annual Fleet Economic Survey. The data does not include or reveal any individual vessel data, only totals and averages.

Estimates for 2021 are based on same year costs and earnings samples, official statistics on landings, capacity and effort, and fuel price. Figures for 2022 are based on 2021 cost and earning samples (as 2022 financial accounts will not be available until early 2023) and 2022 landings, effort, and fuel price data. Therefore, 2022 figures should be considered preliminary estimates based on the available administrative data sources and forecasting methodology. Seafish will revise those estimates when 2022 cost and earnings data become available.

The dataset presented in this report is downloadable from the Seafish Website[1]. The website also offers access to our full suite of publications covering the economic performance of the UK seafood catching and processing sectors. Bespoke analyses are available upon request, dependent on sufficient data being available to ensure business anonymity.

If you have any comments about this report, would like to suggest improvements or would like more detailed information, please contact us at:

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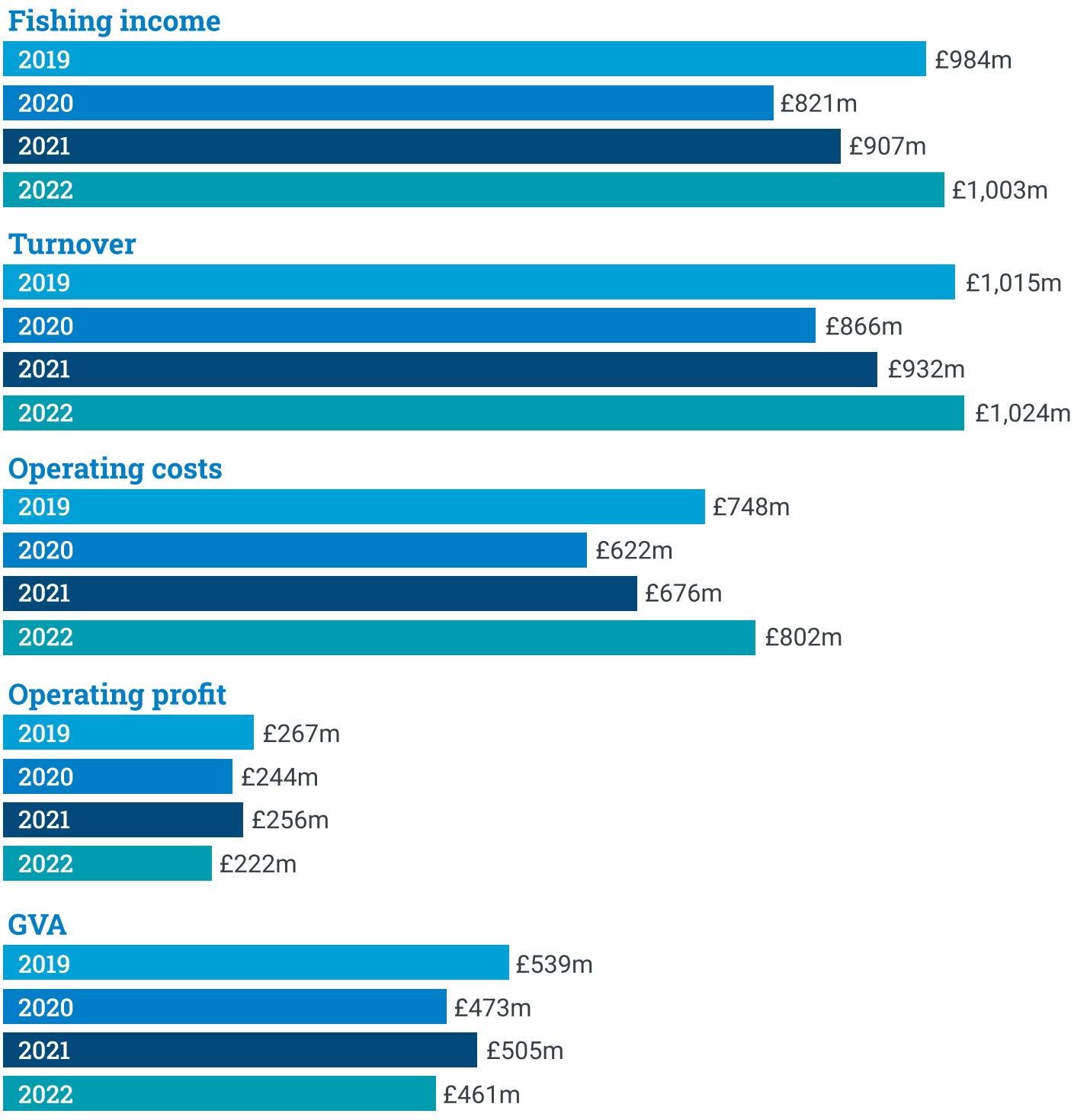
NOTE: all financial figures in this report are nominal (i.e., not adjusted for inflation).

1 https://www.seafish.org/insight-and-research/fishing-data-and-insight

UK Overview

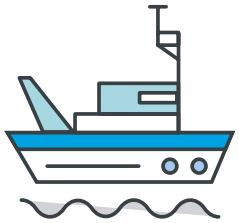
The UK Fishing Fleet

FIGURE 1: The UK fishing fleet 2019 to 2022



Fleet Size

FIGURE 2: Number of vessels in 2022



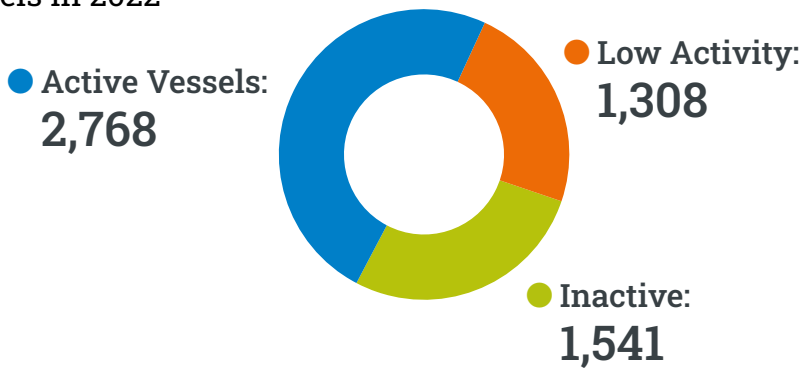
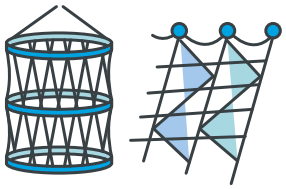


FIGURE 3: Number of active vessels in 2022 by main gear use



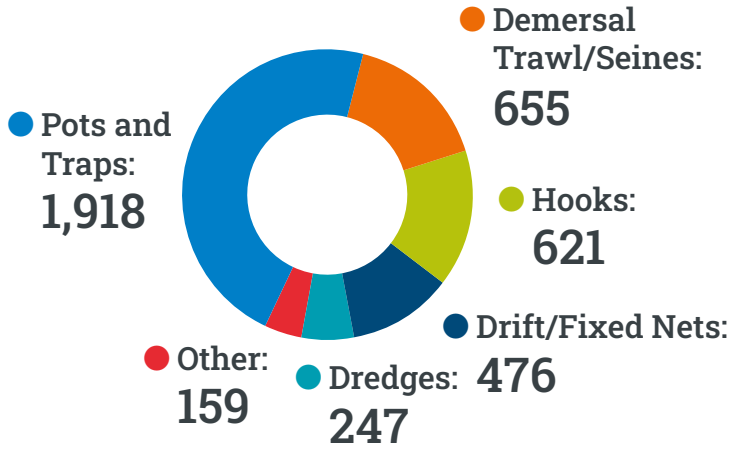
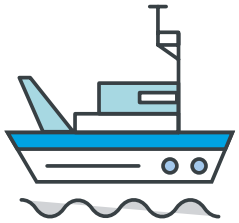
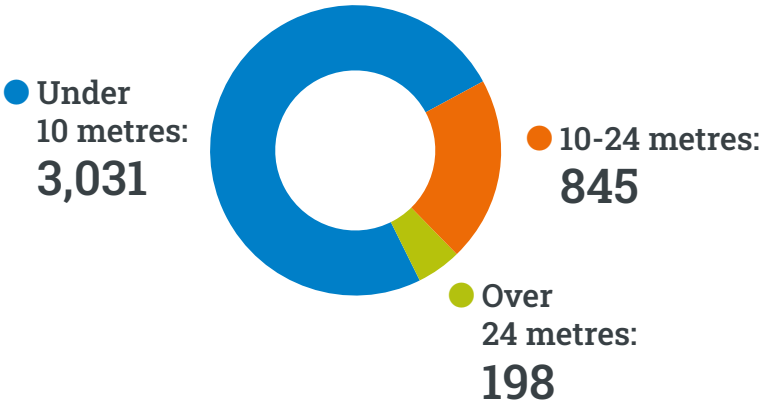


FIGURE 4: Numbers of active vessels in 2022 by size





Landings

The UK fishing fleet landed 619 thousand tonnes of fish and shellfish in 2022.
The majority of landings were into UK ports, mainly Peterhead, Lerwick and Newlyn.
Landings abroad took place mainly in the Netherlands, Ireland and Norway.

FIGURE 5: UK weight landings by port 2022 (tonnes)

FIGURE 6: Landings by port 2022

By Weight (tonnes)

By Value (£)

Top 5 Species

Total weight of landings
619,000 tonnes in 2022,
which is a -3% change from 2021.

Total value of landings
£1,003m in 2022,
which is a 11% increase from 2021.

FIGURE 7: Top 5 species landed by weight (2022)

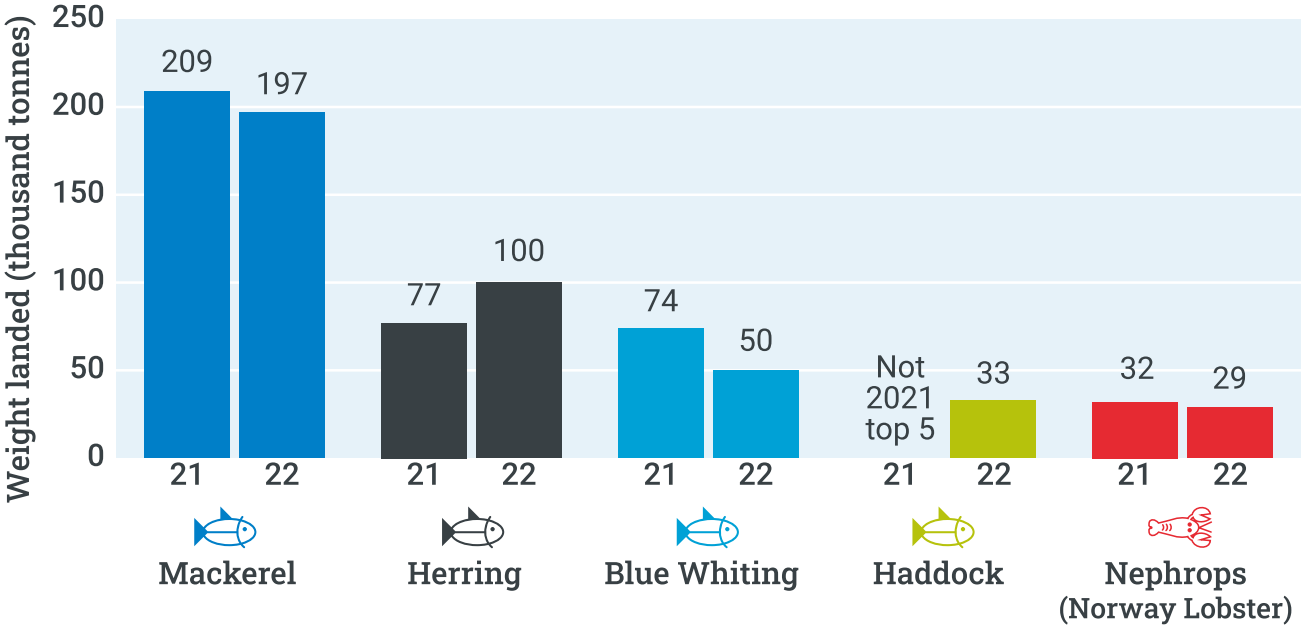
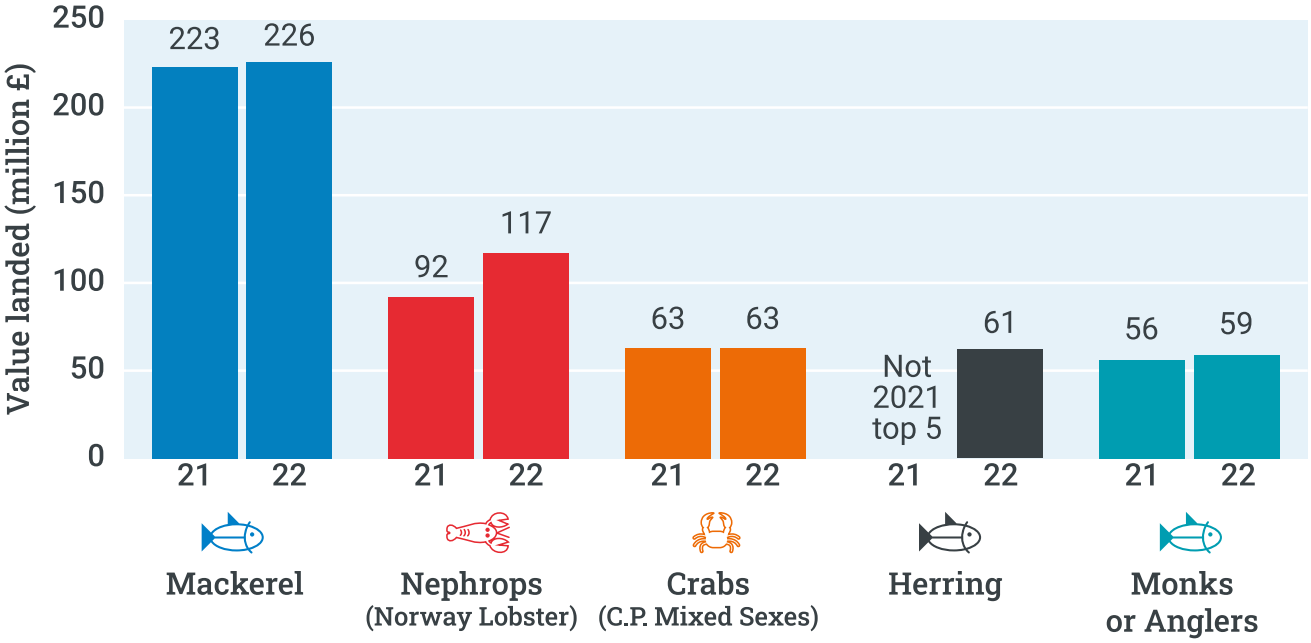


FIGURE 8: Top 5 species landed by value (2022)



Employment

UK Overall (including Islands)

6,557 FTEs

(6,955 in 2021)

Scotland

3,325 FTEs

(3,506 in 2021)

England

2,441 FTEs

(2,613 in 2021)

Northern Ireland

578 FTEs

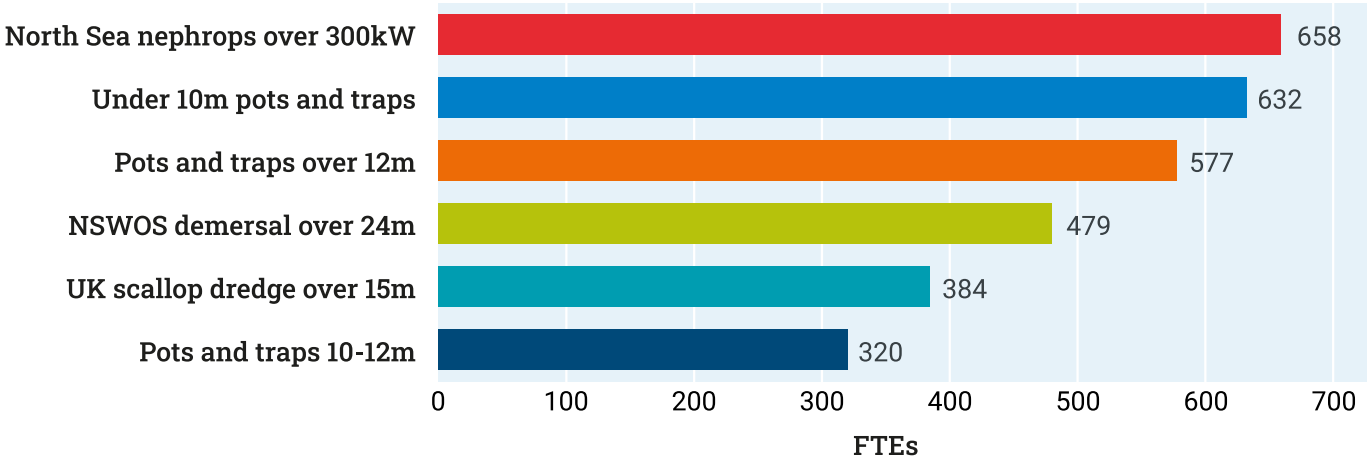
(617 in 2021)

Wales

95 FTEs

(102 in 2021)

FIGURE 9: Employment by sector



The wider context: 2021 and 2022 in perspective

After the shock of the Covid-19 pandemic, challenges continued to mount for the UK fishing fleet. Covid-19 and the post-Brexit regulatory environment were key factors in 2021, while the consequences of the Russian invasion of Ukraine and the cost-of-living crisis added to the picture in 2022.

Lockdowns and rules to contain the spread of Covid-19 continued into the first quarter of 2021 and were gradually lifted on par with the vaccine roll-out. They included restrictions on domestic and international travel, gatherings of people and on capacity in hospitality venues; all of which impacted labour availability, out of home dining opportunities, seafood demand, prices and trade.

The EU-UK Trade and Cooperation Agreement (TCA) was agreed in December 2020 and new rules came into force from 1 January 2021. The main implications of the TCA for the seafood sector included:

- Additional quota for UK fishing vessels over a five-year transition period, with annually negotiated TACs during the adjustment period. International quota swaps to be negotiated annually.
- Tariff-free trade between the UK and the EU but with increased bureaucracy.
- Implementation of the Northern Ireland Protocol regulating trade between Northern Ireland, the rest of UK and the EU.

In addition, free movement of people between the UK and the EU stopped at the beginning of 2021.

The combination of lockdowns and new trade rules sent shock ripples that reached all the way to the fishing fleet in early 2021. The closure of the hospitality sector in the UK and abroad meant a lower demand for seafood in the first half of 2021, while the TCA resulted in significant disruptions to UK/EU seafood trade as businesses learnt to navigate the new rules and faced increased costs. Reduced demand and trade negatively impacted prices in early 2021 and in turn, the fleet that supplied this seafood.

In the first half of 2021 the UK, Norway and the EU agreed Total Allowable Catches (TACs) on six shared stocks, with reductions for North Sea cod, plaice, saithe and herring, and increases in haddock and whiting compared with 2020. The UK and the EU reached a bilateral fisheries agreement in

June 2021 for 75 stocks. However, there was no agreement with Norway and Faroe meaning that UK vessels did not have access to Norwegian and Faroese waters in 2021. The UK whitefish fleet worried that reduced quotas and lack of access to these waters would reduce their fishing opportunities in 2021 and put further pressure on UK waters.

Labour was another pressing concern for the fleet in 2021. Many people changed industries during lockdown, or even countries, as many EU people returned to their home countries. As Covid-19 restrictions were lifted and businesses reopened, the UK faced a staff shortage. Affected sectors included fishing, seafood processing, hospitality and logistics (lorry drivers). The UK introduced the Skilled Worker Visa in 2021, which permits recruitment of foreign workers in certain key sectors of the UK economy, including fishing. Historically, vessel owners could hire European/EEA nationals via the freedom of movement between EU and UK, or non-EEA/UK nationals through the transit visa route.

As Covid-19 restrictions lifted, a reduced supply and increased demand generally helped increase prices of seafood in the second half of 2021, but not all species or areas benefited from an increase. For example, staff shortages in the demersal processing sector drove prices for smaller fish sizes down, as businesses did not want to buy fish that is more labour intensive to process.

As 2021 progressed, economic activity recovered, and with it, demand for fuel. Subsequently fuel price began to increase, causing concern among some vessel owners and skippers. In February 2022 the Russian invasion of Ukraine began. The reduced supply of oil that followed resulted in prices of marine fuel reaching record highs, the increase further exacerbated by the weakening of the pound against the dollar. Furthermore, prices of some materials (e.g. sunflower oil and grain) also increased as the war disrupted international trade and economic prospects became bleak: the Bank of England predicted the biggest cost of living squeeze in 30 years for UK households and increased the interest rates to limit inflation. This was bad news for seafood, as consumption typically falls when people's personal finances are stretched. The combination of high fuel prices, inflation, high interest rates and labour shortages resulted in a worrying picture for the UK fleet in 2022, particularly for small scale businesses.

High fuel prices negatively impacted profitability and crew wages, and some vessel owners worried their crew may leave for better paid jobs. All over the UK there were reports of vessels reducing their activity or tying up to try to reduce costs. Prices of other materials such as fishing gear and boxes also increased. For some sectors, higher landings prices helped businesses to cope with the fuel bills, such as those targeting whitefish, which saw an increase in demand for non-Russian caught whitefish. However, not all species or areas of the UK benefitted from higher landing prices in 2022, such as smaller haddock caught by the Scottish whitefish fleet due to a lack of market for this product.

Legislative changes by the Home Office in the first half of 2023 meant that the transit visa route will be only available for vessels operating exclusively outside 12nm. Many workers previously on a transit visa will have to either switch to a Skilled Worker Visa or leave the UK.

In terms of fishing opportunities, the 2022 UK/EU/Norway agreement provided increased TACs for haddock, whiting and herring, and decreases for plaice and saithe, while the cod TAC remained unchanged compared to 2021. Access to Norwegian and Faroese waters and quota swaps were restored in 2022. However, this agreement was seen as insufficient by some representatives of the whitefish industry, who reported it left them with lower quotas than they had pre-Brexit.

Other developments were of interest for owners and operators of UK fishing vessels during the period 2021-2022:

- The Maritime and Coastguard Agency (MCA) introduced the new Code of Practice for the Safety of Small Fishing Vessels in 2021, requiring these vessels to be inspected in and out of the water every five years.
- Concerns about spatial squeeze increased as pilots for Highly Protected Marine Areas (HPMAs) were announced in 2021 in England and Scotland, as well as 17 new offshore wind farms in Scotland.
- The Catch app for recording of catches by under 10m vessels in England and Wales was fully enforced in 2022. In the same year Vessel Monitoring System (VMS) was introduced for under 12m vessels in Wales and England. At the time of writing this report, the roll-out plan for these devices is still ongoing.

- The Animal Welfare (Sentience) Bill that classifies decapod crustaceans and cephalopod molluscs, among other species, as sentient beings was approved by Parliament in April 2022.
- Fishers working in southeast England and the Thames reported poor fishing during the summer of 2022, citing issues with spider crabs in static gear fisheries, a poor cockle fishery in the Thames and sedimentation issues around the Isle of Wight adversely impacting fish stocks. Starting in late 2021, several episodes of mass mortality of crabs and lobsters occurred in northeast England. A panel of researchers pointed to a novel pathogen as the most likely cause of the mortality.
- The Joint Fisheries Statement (JFS), which sets out the policies for achieving the objectives in the Fisheries Act 2020, was published in November 2022. Following the release of the JFS, preparation of individual Fisheries Management Plans is underway and the first plans are expected to be published in late 2023.

Home nations analysis

Fleet size and activity

Overall, the size of the UK fishing fleet continued the decreasing trend that has been taking place for the last decade. The decline is particularly noticeable among the Northern Irish and Welsh under 10m fleets (17% and 8% decrease in 2022 respectively, compared to 2021). Anecdotal reports from fishing industry members and representatives from these nations mention an ageing workforce, low number of new entrants due to high entry costs and increasing regulation as some of the factors behind the decrease in the size of their small-scale fleets.

Fishing activity (days at sea), which recovered partially in 2021 after the disruption caused by Covid-19 in 2020, decreased slightly in 2022 by an average of 4% across all nations, possibly in an attempt to reduce fuel costs. Average days at sea in 2022 were generally lower than they had been in 2019 in all nations and length groups, except for the Northern Irish over 24m fleet. Days at sea by these vessels were 70% higher in 2022 than in 2019, as mackerel quota (their main target species) increased after 2019.

Income and costs

Thanks to higher prices of fish, average fishing income per vessel increased across all nations and length groups in 2021 and 2022 (with the exception of Northern Irish over 24m vessels, which had a similar average income in 2021 and 2022). Average income per vessel in 2022 was even higher than it had been in 2019 in all nations and length groups, except in Scottish 10-24m vessels, whose average income was slightly lower in 2022 compared to 2019.

Fishing costs, which dropped noticeably in 2020 due to lower levels of activity and fuel prices, increased in 2021 by an average 13% as activity and the price of fuel increased again, although for most nations and length groups average costs were still lower than in 2019. The fuel price shock of 2022 led to a considerable increase in average costs per vessel in 2022: between 7% and 42% depending on the nation and length group, with the lowest increase belonging to the Welsh small-scale fleet.

Profits and GVA

Average profits increased in 2021 for the Scottish and Welsh fleets, in some cases reaching profits similar to 2019. Average profits decreased for the Northern Irish fleet in 2021, and trends were mixed for the English fleet.

In 2022, despite the higher average income, the increase in operating costs led to a general reduction in average profits across all nations and length groups, particularly among the English over 24m fleet. The exceptions were the Scottish over 24m sector, which had similar profits over the last four years, and the Northern Irish under 10m fleet, which saw average profits increase in 2022, although they were still lower than pre-Covid-19.

Trends in average Gross Value Added (GVA) per vessel were largely similar to those in average profits in 2020, 2021 and 2022, with reduced GVA in 2022 in most nations and length groups.

TABLE 1: Main economic indicators by home nation and vessel length group

Nation and length group	Number of vessels		Average days at sea		Average fishing income (£'000)		Average operating costs (£'000)		Average operating profit (£'000)	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
England	**2,016** →	**1,930** →								
Under 10m	1,593 →	1,515 →	46 ↑	44 ↓	35 ↑	37 ↑	27 ↑	30 ↑	9 →	8 ↓
10-24m	350 →	346 →	131 ↑	128 →	313 ↑	350 ↑	258 ↑	306 ↑	62 ↑	51 ↓
Over 24m	73 →	69 ↓	223 →	218 →	1,693 →	1,891 ↓	1,417 →	1,802 ↑	296 ↓	108 ↓
Scotland	**1,719** →	**1,643** →								
Under 10m	1,210 →	1,160 →	55 ↑	54 →	43 ↑	48 ↑	33 ↑	38 ↑	13 ↑	13 →
10-24m	388 ↓	363 ↓	153 ↑	144 ↓	324 ↑	370 ↑	291 ↑	352 ↑	47 ↑	34 ↓
Over 24m	121 →	120 →	176 →	184 →	3,051 ↑	3,538 ↑	1,922 ↑	2,396 ↑	1,185 ↑	1,182 →
Wales	**250** →	**232** ↓								
Under 10m	228 →	209 ↓	26 ↑	23 ↓	24 ↑	25 ↑	18 ↑	20 ↑	8 ↑	7 ↓
10-24m	20 ↓	21 ↑	103 →	98 ↓	193 ↑	197 ↑	148 ↑	157 ↑	51 ↑	46 ↓
Over 24m	2 ↓	2 →	214 →	215 →	* *	* *	* *	* *	* *	* *
Northern Ireland	**230** →	**201** ↓								
Under 10m	130 →	108 →	77 ↑	73 ↓	28 ↑	39 ↑	26 ↑	36 ↑	4 ↓	5 ↑
10-24m	94 →	86 ↓	141 ↑	140 →	256 ↑	331 ↑	224 ↑	313 ↑	46 ↓	27 ↓
Over 24m	6 ↑	7 ↑	149 ↑	135 ↓	4,167 ↓	4,096 ↓	2,362 ↓	2,688 ↑	1,860 ↓	1,410 ↓

* Data not shown for confidentiality purposes

↑ Increase of >5% compared to previous year
→ Change in the range of -/+5% compared to previous year
↓ Decrease of >5% compared to previous year

TABLE 1: Main economic indicators by home nation and vessel length group (continued)

Nation and length group	Average GVA (£'000) 2021		2022		2022 Main stock/species by value	Stock/ species status	% of fleet segment revenues	% of stock/ species landings caught by this fleet
England								
Under 10m	20	↑	19	↓	Lobsters		28%	30%
10-24m	158	↑	146	↓	Crabs (C.P. Mixed Sexes)		23%	43%
Over 24m	761	↓	556	↓	Cod 1-2	■	11%	100%
Scotland								
Under 10m	26	↑	27	→	Lobsters		26%	28%
10-24m	142	↑	125	↓	Nephrops 4A, FU7	■	17%	68%
Over 24m	1,936	↑	1,930	→	Mackerel 1-8, 9A and 14	■	46%	79%
Wales								
Under 10m	16	↑	15	↓	Whelks		36%	11%
10-24m	107	↑	98	↓	Whelks		53%	13%
Over 24m	*	*	*	*	Monks or Anglers		68%	7%
Northern Ireland								
Under 10m	13	↓	16	↑	Nephrops 7A, FU15	■	30%	8%
10-24m	133	↑	125	↓	Nephrops 7A, FU15	■	46%	91%
Over 24m	2,811	↓	2,195	↓	Mackerel 1-8, 9A and 14	■	60%	9%

* Data not shown for confidentiality purposes

↑ Increase of >5% compared to previous year
→ Change in the range of -/+5% compared to previous year
↓ Decrease of >5% compared to previous year

Fleet segment analysis

Fleet size and activity

The UK fishing fleet has been decreasing in size since 2017 at an average rate of 2% each year. 2022 was no exception, with most segments showing slight decreases in size. The biggest decrease took part in the under 10m pots and traps segment, which lost around 100 vessels in 2022.

The make-up by segment of the UK fishing fleet has been largely stable for the last 4 years, with the exception of a temporary switch of some North Sea Nephrops vessels to demersal trawling in 2020. Under 10m vessels (particularly pots and traps) form the largest group of vessels, followed by Nephrops and demersal trawlers.

After the reduction in fishing activity in 2020 due to Covid-19, days at sea recovered in 2021, although they were generally still slightly lower than in 2019. Most segments reduced or kept similar levels of activity in 2022 compared to 2021, but there were marked decreases in average days at sea in some segments, particularly trawlers, perhaps trying to reduce their fuel bill. For example, during our 2022 survey some owners of Area 7A demersal trawlers reported that high costs and uncertainty about prices of small fish sizes were some of the factors behind their business decisions.

Thanks to higher prices once markets reopened, average fishing income per vessel increased for most segments in 2021, although they were still below 2019 figures in most cases. This increasing trend continued into 2022, when average fishing income grew between 7% and 84% depending on the segment. The highest increase corresponded to NSWoS demersal seiners, many of which are Dutch-owned vessels landing squid into the Netherlands. Their catches of squid increased noticeably in 2022 compared to 2021, as well as getting a higher price for their catch.

For most segments average fishing income in 2022 was in line with 2019 figures or higher. Only four segments experienced decreasing fishing income in 2022 (Area 7A demersal trawlers, NS beam trawlers under 300kW, NSWoS demersal trawlers under 24m over 300kW and pots and traps over 12m), as their days at sea and in some cases their landings per day at sea decreased in 2022.

TABLE 2: Fleet size and activity 2021-22

Segment	Number of vessels		Average days at sea		Average fishing income (£'000)	
	2021	2022	2021	2022	2021	2022
Area VIIA demersal trawl	7 →	7 →	178 ↑	110 ↓	287 ↑	227 ↓
Area VIIA nephrops over 250kW	29 ↑	24 ↓	155 ↑	161 →	320 ↑	465 ↑
Area VIIA nephrops under 250kW	30 →	27 ↓	119 ↑	124 →	141 ↑	214 ↑
Area VIIBCDEFGHK 24-40m	12 ↓	14 ↑	280 ↑	239 ↓	1,413 ↑	1,515 ↑
Area VIIBCDEFGHK trawlers 10-24m	44 ↓	45 →	140 ↑	141 →	179 ↑	246 ↑
North Sea beam trawl over 300kW	5 ↓	6 ↑	245 →	165 ↓	495 ↓	845 ↑
North Sea beam trawl under 300kW	17 ↓	16 ↓	77 →	62 ↓	61 ↓	56 ↓
North Sea nephrops over 300kW	70 ↑	76 ↑	193 ↑	181 ↓	659 ↑	743 ↑
North Sea nephrops under 300kW	62 ↓	57 ↓	101 →	106 ↑	120 ↑	162 ↑
NSWOS demersal over 24m	41 →	39 →	207 ↑	213 →	1,682 ↑	2,275 ↑
NSWOS demersal pair trawl seine	26 →	22 ↓	162 ↓	208 ↑	1,284 ↓	1,812 ↑
NSWOS demersal seiners	21 →	19 ↓	201 ↑	211 ↑	1,004 ↓	1,842 ↑
NSWOS demersal under 24m over 300kW	24 ↓	22 ↓	203 ↑	176 ↓	1,022 ↑	967 ↓
NSWOS demersal under 24m under 300kW	10 ↓	8 ↓	94 ↓	82 ↓	199 ↓	207 →
South West beamers over 250kW	23 →	22 →	214 →	221 →	1,080 ↑	1,431 ↑
South West beamers under 250kW	20 ↓	22 ↑	216 ↑	218 →	671 ↑	807 ↑
UK scallop dredge over 15m	63 ↓	64 →	173 ↑	168 →	559 ↑	623 ↑
UK scallop dredge under 15m	174 ↑	165 ↓	89 →	92 →	167 ↑	208 ↑
Under 10m demersal trawl/seine	173 →	175 →	71 →	74 →	62 ↑	86 ↑
Under 10m drift and/or fixed nets	197 ↑	201 →	62 →	55 ↓	39 →	42 ↑
Under 10m pots and traps	1,167 ↑	1,066 ↓	79 →	76 →	68 ↑	73 ↑
Under 10m using hooks	228 ↑	228 →	55 ↑	54 →	39 ↑	43 ↑
WOS nephrops over 250kW	29 ↑	29 →	159 ↑	157 →	259 ↑	345 ↑
WOS nephrops under 250kW	55 →	51 ↓	149 ↑	129 ↓	163 ↑	196 ↑
Gill netters	26 →	29 ↑	157 →	165 ↑	583 ↑	650 ↑
Longliners	26 →	26 →	158 →	165 →	350 ↑	465 ↑
Pots and traps 10-12m	172 →	162 ↓	145 ↑	135 ↓	178 ↑	184 →
Pots and traps over 12m	104 →	101 →	184 →	171 ↓	551 ↑	533 →

↑ Increase of >5% compared to previous year

→ Change in the range of -/+5% compared to previous year

↓ Decrease of >5% compared to previous year

TABLE 2: Fleet size and activity 2021-22 (continued)

Segment	Main stock/species landed by value	Stock status	Stock/species dependency % of fleet segment revenues	Fleet significance % of stock/species landings that is caught by this fleet
Area VIIA demersal trawl	Haddock 7A	■	39%	85%
Area VIIA nephrops over 250kW	Nephrops 7A, FU15	■	74%	57%
Area VIIA nephrops under 250kW	Nephrops 7A, FU15	■	65%	27%
Area VIIBCDEFGHK 24-40m	Monks or anglers		41%	42%
Area VIIBCDEFGHK trawlers 10-24m	Cuttlefish 2A, 3A, 4-9		21%	15%
North Sea beam trawl over 300kW	Plaice 4 and 20	■	47%	26%
North Sea beam trawl under 300kW	Brown shrimp		90%	80%
North Sea nephrops over 300kW	Nephrops 4A, FU7	■	49%	85%
North Sea nephrops under 300kW	Nephrops 4B, FU8	■	45%	70%
NSWOS demersal over 24m	Anglerfish 3A, 4 and 6	■	19%	43%
NSWOS demersal pair trawl seine	Haddock 4, 6A and 20	■	27%	38%
NSWOS demersal seiners	Common squid 2A, 3A, 4-9		18%	32%
NSWOS demersal under 24m over 300kW	Anglerfish 3A, 4 and 6	■	29%	17%
NSWOS demersal under 24m under 300kW	Anglerfish 4, 6 and 3A	■	29%	1%
South West beamers over 250kW	Sole 7E	■	22%	42%
South West beamers under 250kW	Sole 7E	■	26%	30%
UK scallop dredge over 15m	Scallops		93%	65%
UK scallop dredge under 15m	Scallops		47%	26%
Under 10m demersal trawl/seine	Nephrops 4B, FU6	■	12%	24%
Under 10m drift and/or fixed nets	Sole 7D	■	17%	44%
Under 10m pots and traps	Lobsters		39%	59%
Under 10m using hooks	Razor clam		29%	41%
WOS nephrops over 250kW	Nephrops 6A, FU13	■	30%	30%
WOS nephrops under 250kW	Nephrops 6A, FU13	■	38%	34%
Gill netters	Hake 3A, 4, 6, 7, 3A, 8AB and 8D	■	34%	23%
Longliners	Hake 3A, 4, 6, 7, 3A, 8AB and 8D	■	57%	38%
Pots and traps 10-12m	Lobsters		31%	18%
Pots and traps over 12m	Crabs (C.P. Mixed sexes)		72%	58%

Stock status (ICES advice):

■ Unknown ■ Above MSY Btrigger

■ Below MSY Btrigger ■ Mixture of above and below MSY Btrigger

TABLE 2: Fleet size and activity 2021-22 (continued)

Segment	2nd Main stock/species landed by value	Stock status	Stock/species dependency % of fleet segment revenues	Fleet significance % of stock/species landings that is caught by this fleet
Area VIIA demersal trawl	Hake 3A, 4, 6, 7, 3A, 8AB and 8D	■	16%	2%
Area VIIA nephrops over 250kW	Nephrops 6A, FU13	■	12%	13%
Area VIIA nephrops under 250kW	Nephrops 6A, FU13	■	12%	7%
Area VIIBCDEFGHK 24-40m	Megrim		19%	80%
Area VIIBCDEFGHK trawlers 10-24m	Common squid 2A, 3A, 4-9		12%	6%
North Sea beam trawl over 300kW	Sole 4	■	25%	44%
North Sea beam trawl under 300kW	Pandalus		10%	67%
North Sea nephrops over 300kW	Anglerfish 3A, 4 and 6	■	14%	20%
North Sea nephrops under 300kW	Nephrops 4B, FU6	■	31%	35%
NSWOS demersal over 24m	Haddock 4, 6A and 20	■	15%	31%
NSWOS demersal pair trawl seine	Cod 4, 7D and 20	■	24%	35%
NSWOS demersal seiners	Plaice 4 and 20	■	13%	43%
NSWOS demersal under 24m over 300kW	Cod 4, 7D and 20	■	13%	11%
NSWOS demersal under 24m under 300kW	Common squid 2A, 3A, 4-9		19%	2%
South West beamers over 250kW	Cuttlefish 2A, 3A, 4-9		21%	45%
South West beamers under 250kW	Cuttlefish 2A, 3A, 4-9		19%	23%
UK scallop dredge over 15m	Queen scallops		4%	76%
UK scallop dredge under 15m	Cockles		36%	97%
Under 10m demersal trawl/seine	Sole 7E	■	9%	9%
Under 10m drift and/or fixed nets	Seabass 4B-C, 7A and 7D-H	■	13%	20%
Under 10m pots and traps	Crabs (C.P. Mixed sexes)		20%	25%
Under 10m using hooks	Seabass 4B-C, 7A and 7D-H	■	27%	40%
WOS nephrops over 250kW	Nephrops 6A, FU12	■	28%	31%
WOS nephrops under 250kW	Nephrops 6A, FU11	■	35%	41%
Gill netters	Anglerfish 3A, 4 and 6	■	18%	12%
Longliners	Razor clam		20%	38%
Pots and traps 10-12m	Crabs (C.P. Mixed sexes)		30%	15%
Pots and traps over 12m	Lobsters		18%	18%

Stock status (ICES advice):

■ Unknown ■ Above MSY Btrigger

■ Below MSY Btrigger ■ Mixture of above and below MSY Btrigger

Landings

The total volume of landings by UK vessels has been largely stable during the period 2019-2022 at between 620 and 636 thousand tonnes per year. This is approximately 10% lower than in 2017 and 2018.

Although the total volume of landings remained stable from 2019 to 2022, its make-up by species group changed slightly: landings of demersal species decreased, and landings of pelagic species increased. Demersal species represented 26% of all landings (by volume) in 2019, but this percentage fell to 22% by 2022. This trend has been primarily driven by lower landings of cod and haddock due to reductions in quota in 2020-21 and the lack of an agreement with Norway, which resulted in UK vessels not being able to catch cod in those waters in 2021. There was a slight recovery in 2022 with a 4% increase in the weight of demersal species landed, as access to Norwegian waters was restored and demand for whitefish grew, but this still meant lower demersal catches than in 2020 and earlier years.

Landings of pelagic species went from 50% of all landings in 2019 to 59% in 2021 and 2022 (by volume), due to higher landings of mackerel and blue whiting (the main pelagic species targeted by the UK fleet along with herring).

Landings of shellfish have also decreased in volume since 2019, from 24% of the total volume landed to 19% in 2022. Shellfish landings in 2022 were around 120 thousand tonnes, 23% lower than in 2019, mainly due to lower landings of Nephrops, brown crab and whelks.

The total fishing income of the UK fleet decreased from £984 million in 2019 to £821 million in 2020, due to lower landings of more lucrative demersal and shellfish species and lower average prices in 2020. In 2021 total fishing income of the fleet partially recovered up to £907 million, and in 2022 reached £1 billion, a figure similar to 2018. The increase in value in 2021 was mainly due to higher average prices and a higher value of shellfish landings, whereas in 2022 it was demersal and shellfish species that drove total value up, as demand and prices for some shellfish and non-Russian whitefish increased.

FIGURE 10: Value of landings by the UK fishing fleet in the UK and abroad by species group, 2018-2022

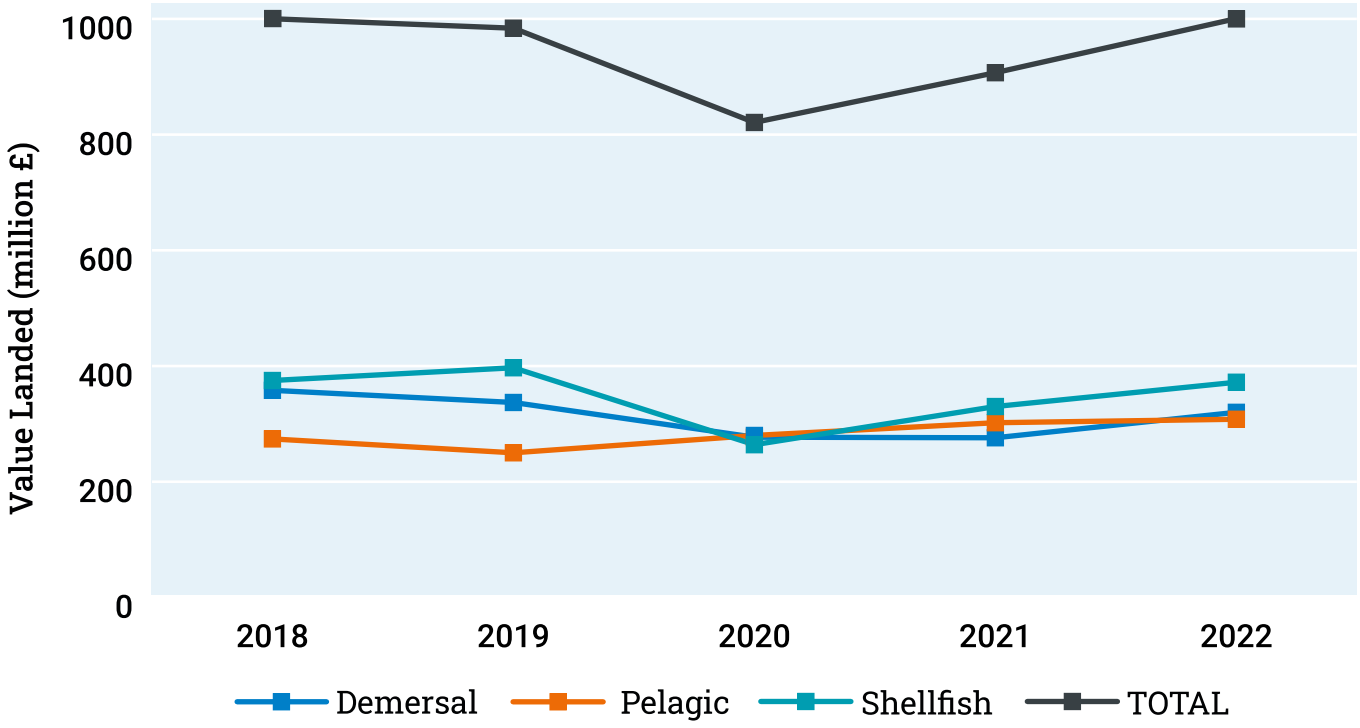
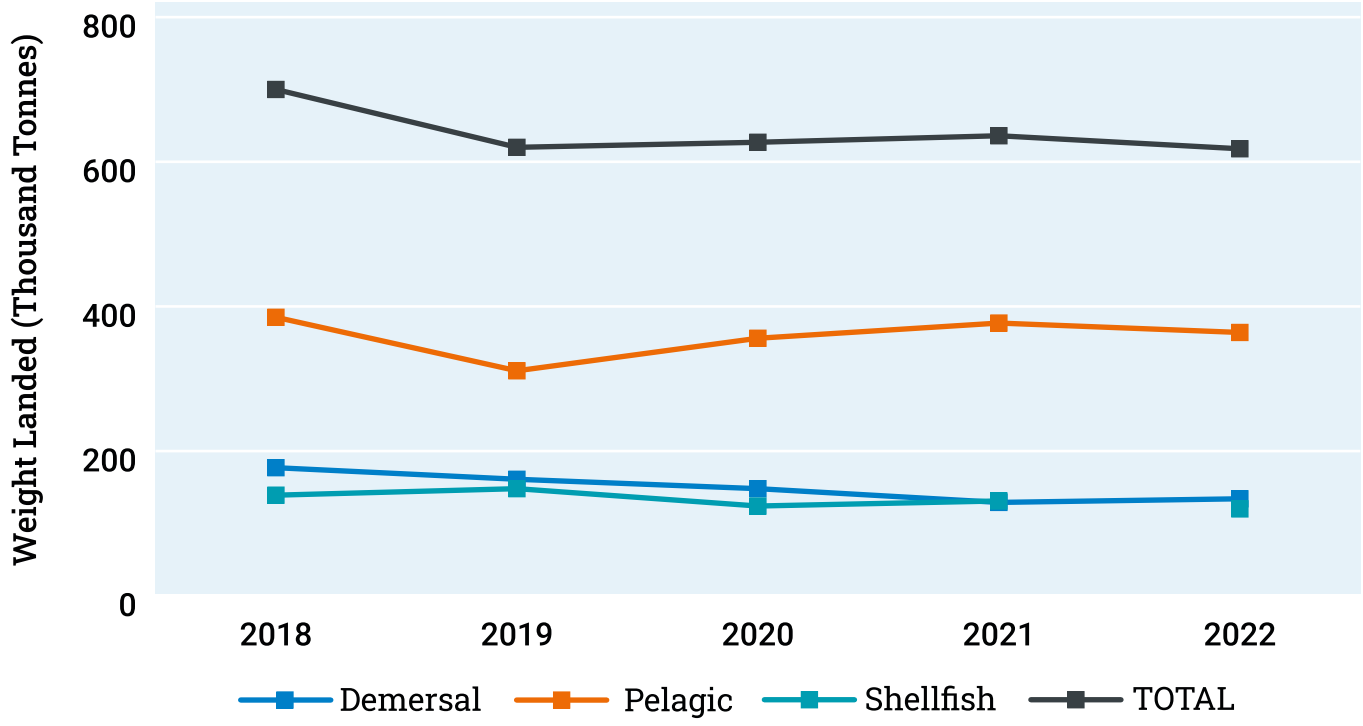


FIGURE 11: Weight of landings by the UK fishing fleet in the UK and abroad by species group, 2018-2022



Fish price

Average prices of most demersal and shellfish species decreased in 2020 as Covid-19 lockdown measures resulted in market closures and reduced demand for seafood. As restrictions relaxed and markets reopened, prices generally recovered in 2021 (although not for all species or to the same degree). Prices increased again in 2022 for important species such as mackerel, Nephrops, brown crab, scallops or monkfish. In some cases (Nephrops or brown crab), these species reached average prices higher than in 2019 (before Covid-19 and EU exit), while for species like scallops, mackerel or monkfish average prices reached similar figures to those pre-pandemic.

The price of cod increased noticeably in 2021 due to reduced supply and stayed high in 2022 at around £3 per kg. Average prices of haddock, whiting or whelk decreased between 4% and 12% in 2022.

FIGURE 12: Average prices of landings of top species by UK registered vessels in the UK and abroad, by species type, 2018-2022

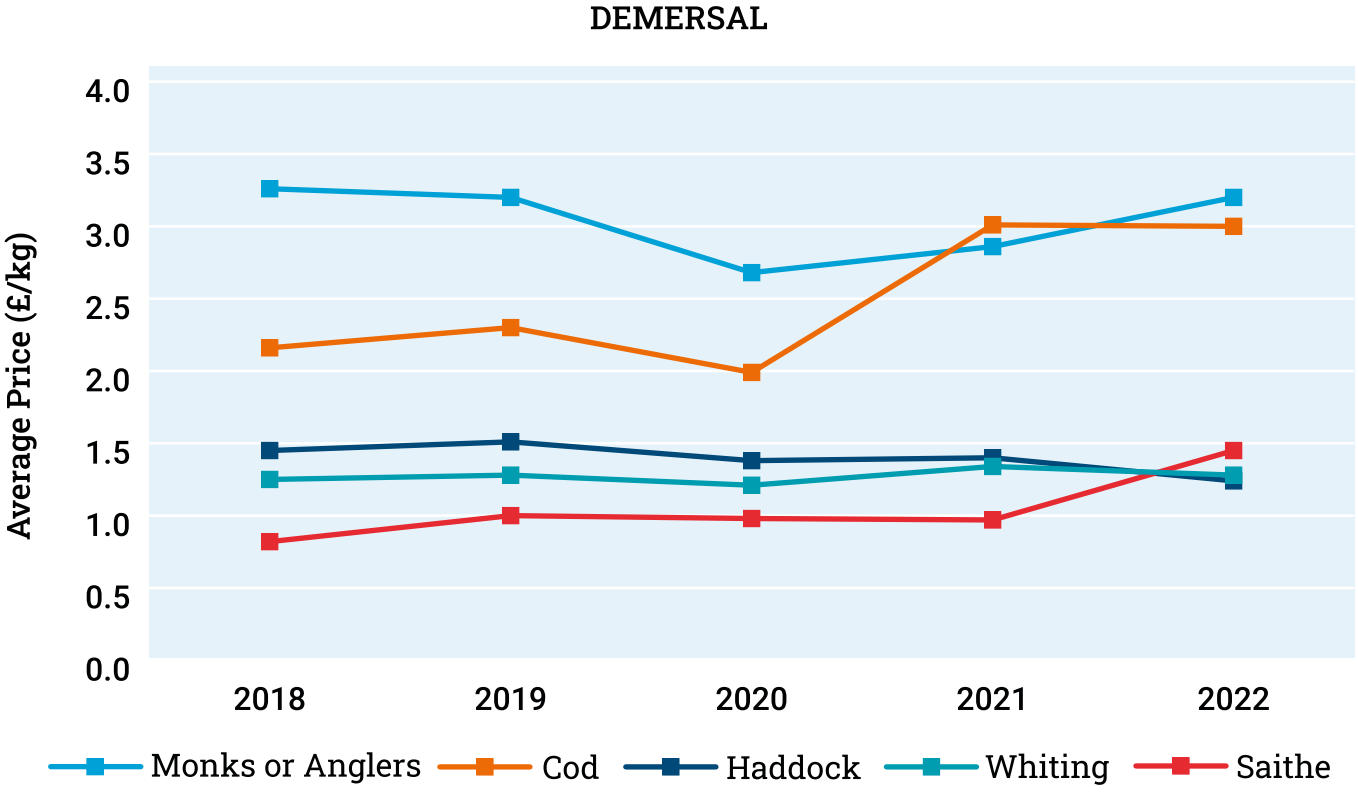
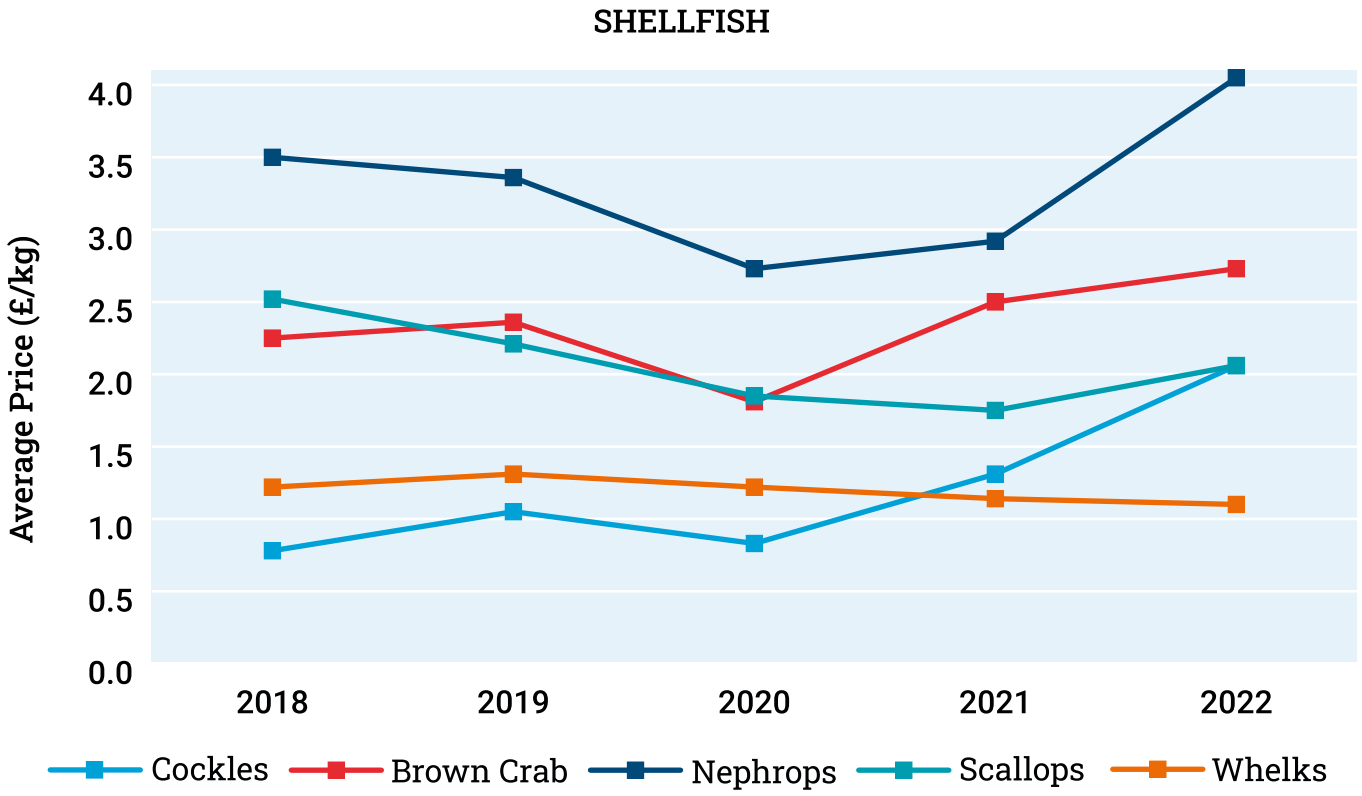
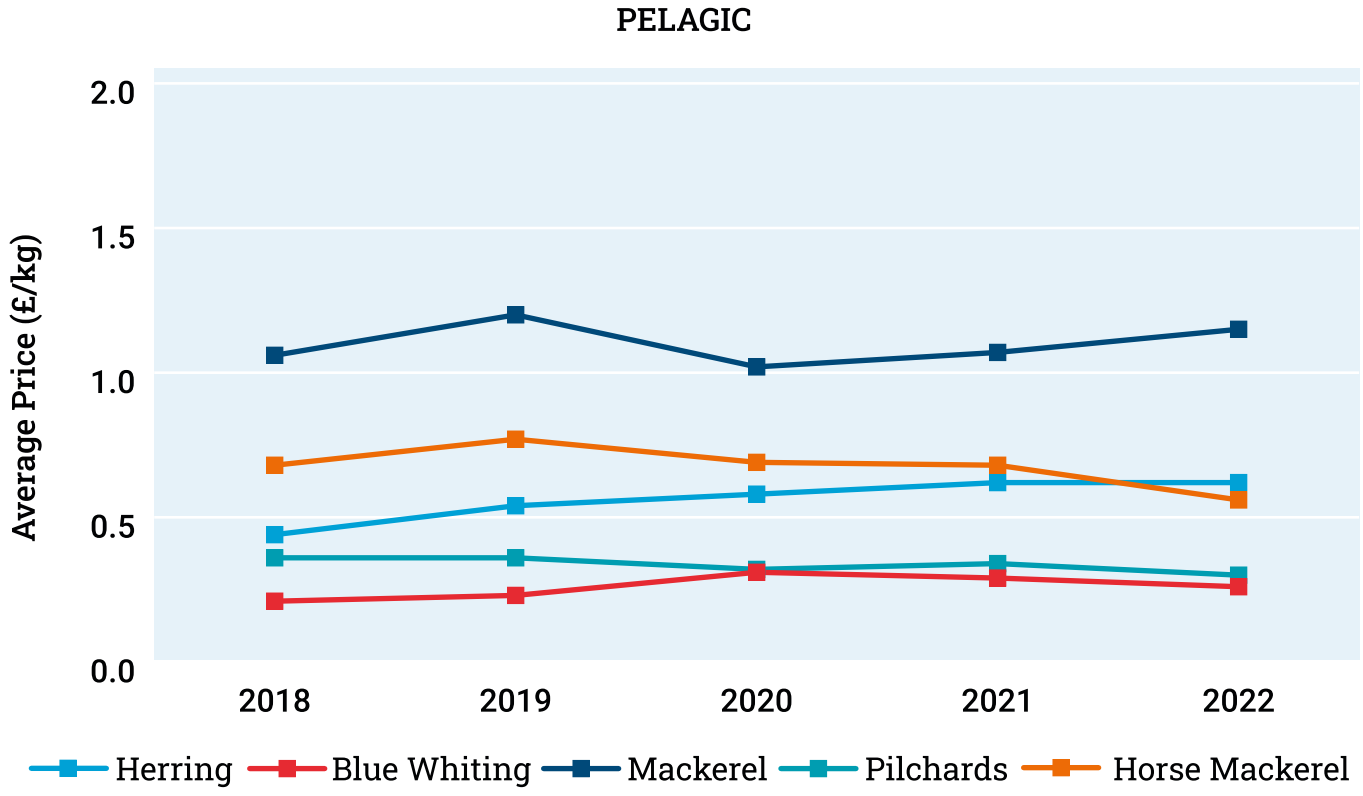


FIGURE 12: Average prices of landings of top species by UK registered vessels in the UK and abroad, by species type, 2018-2022 (continued)





Vessel owners' views on their 2021-22 business performance

In the summer of 2022, our researchers visited fishing ports around the UK, speaking to a total of 531 skippers and vessel owners about their recent economic performance and aspirations for the future.

Despite the difficult economic environment of 2022, the percentage of respondents that rated their recent performance as 'above average' rose to 23%, compared to 8% in our previous survey. The most mentioned factors related to performance were, as in previous surveys, stock status and prices for catch. The third most discussed factor was – unsurprisingly, given the fuel crisis of 2022 – operating costs, which in previous surveys had never featured in the top five list of concerns. Stock status and prices were mostly seen as positive influences, sometimes saving the year despite difficulties in other areas, while every vessel owner that spoke of operating costs did so in a negative manner.

Nearly half (45%) of survey respondents discussed stock abundance, with two thirds of those responses stating stock abundance in the last 12 months had been good for their business (up from nearly half of responses in the previous survey). Owners of under 10m vessels, particularly potters targeting lobsters, represented the majority of the respondents pleased with the status of stocks; whereas owners of under 10m potters targeting crabs were the majority of those unhappy with stock abundance, some citing concerns about overexploitation. There were reports of abundant spider crabs, however respondents were unhappy that they damaged nets and there is no market in the UK for them.

Price of catch was discussed by a third of respondents, with nearly 60% of them reporting being happy with the prices they received. This is a change from the two previous surveys, when most owners who discussed prices had a negative perspective. Again, most of the respondents that were happy with prices were owners of under 10m vessels.

Of all operating costs involved in fishing, fuel was the most widely discussed: of the third of respondents who said operating costs had negatively impacted them, 81% mentioned fuel. Some discussed changing fishing patterns to save fuel. The increasing costs of bait, gear or electricity for chillers were also mentioned.

Rules/regulations and weather were less frequently mentioned by vessel owners (14% and 10% of respondents, respectively). When they were brought up in discussion, it was mostly in a negative manner. Although rules and regulations were discussed generically (i.e., "too many restrictions"), one factor that was mentioned explicitly was the new MCA code for small vessels. Around 8% of respondents said access to labour had affected their recent performance, mostly negatively. This is closely related to rules and regulations, as many of those who mentioned labour reported losing crew on transit visas or being concerned they would no longer be able to recruit them.

When asked about their outlook for the future, respondents were evenly split among perceiving the future as 'very bad/bad' (30%), 'neutral/unsure' (33%) or 'good/very good' (35%). Rules and regulations, stock abundance and operating costs were the most discussed factors (between 18% and 22% of respondents). Regulations and operating costs were seeing by most owners as having a negative influence on the future, particularly as fuel prices continue to cause concern. Stock abundance on the other hand was mostly perceived as looking positive for the future.

FIGURE 13: Vessel owners' views on their recent performance and future outlook

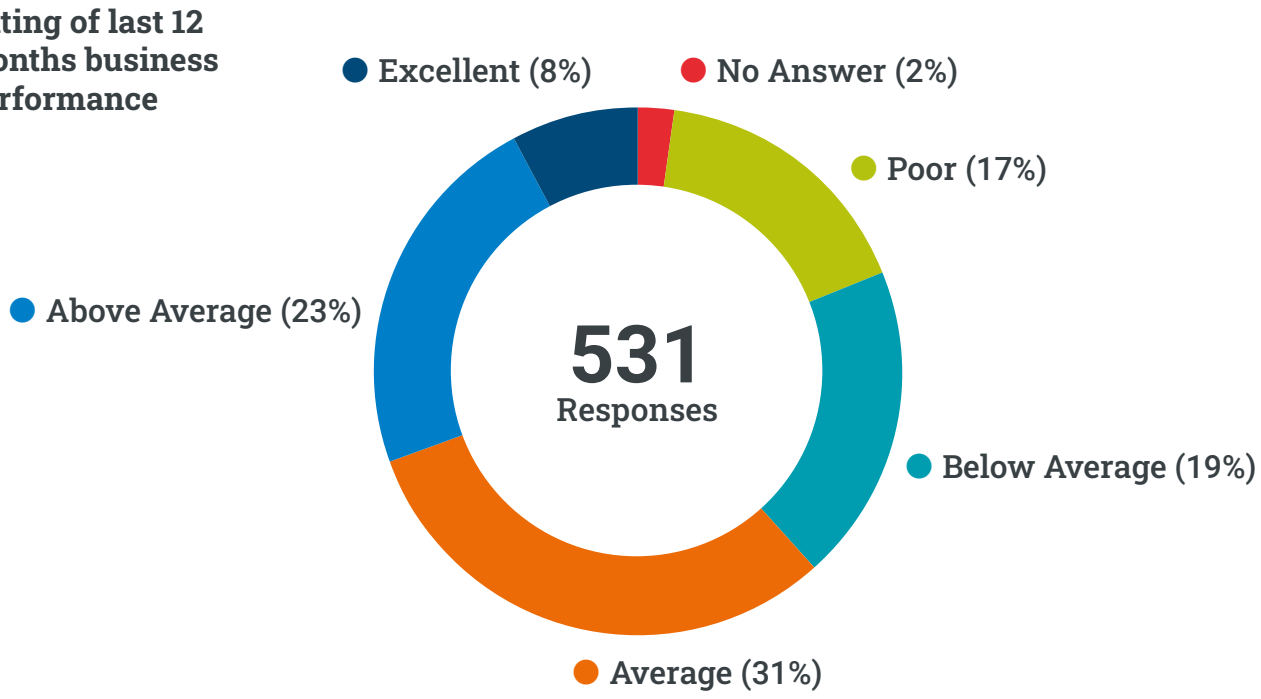
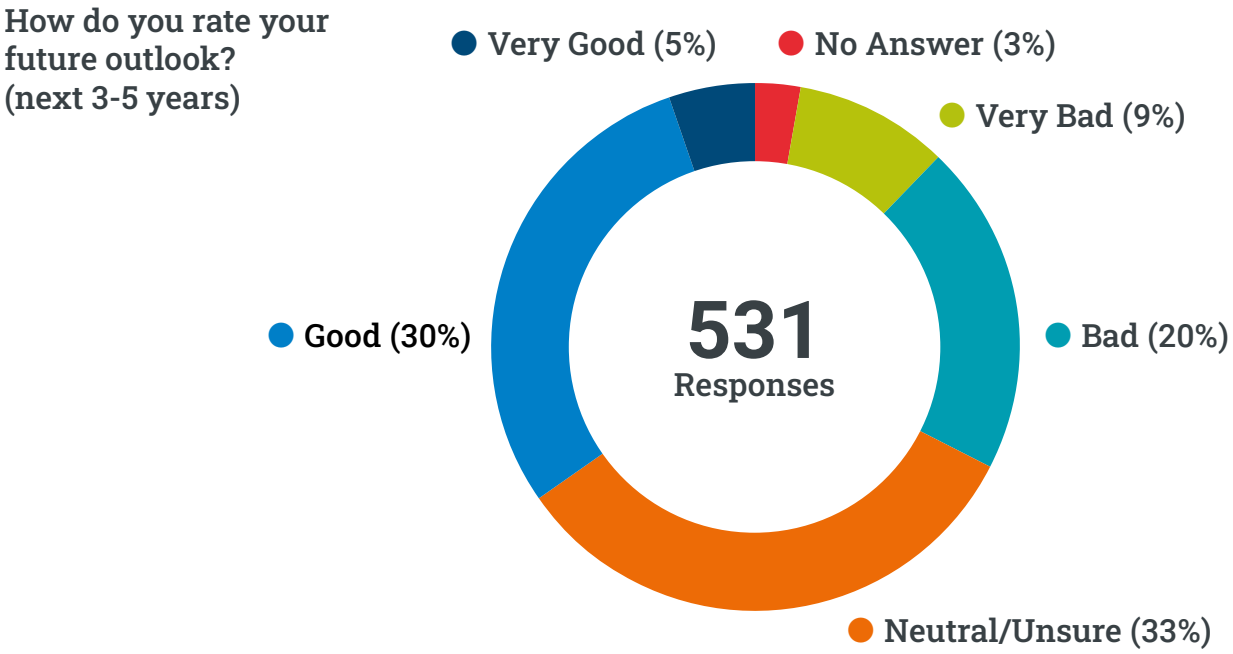


FIGURE 13: Vessel owners' views on their recent performance and future outlook (continued)



Fishing efficiency

Fishing efficiency refers to the weight and value of landings relative to fishing costs and fishing effort (day at sea).

Trends in weight of landings per day at sea are typically mixed across fleet segments and from one year to the next as they are reliant on factors such as stock status, level of activity or length of fishing trips, which can vary greatly. However, clearer trends can be observed in the data in some cases. Weight landed per day at sea has increased for four years in a row for scallop dredgers over 15m, whereas they have decreased for pots and traps vessels over 12m. The latter target mostly brown crab and during our 2022 survey, several owners of these vessels reported poor catches, although prices were good.

Fishing income per day at sea is determined by the volume of catches but also by the price of the catch. The economic recovery and increased demand after early 2021 meant higher average prices for some species and fishing income per day at sea increased for most segments that year, particularly those targeting shellfish. In 2022, all segments had higher fishing income per day at sea than in 2021, as prices of some key whitefish and shellfish species continued to increase.

However, the same trend occurred for fishing costs per day at sea. The higher price of fuel was responsible for this increase in costs, which affected all fleet segments, particularly those using more fuel intensive gears such as trawls or dredges.

TABLE 3: Landings, fishing income and expenditure per day at sea, 2021-22

Segment	Landings per day		Fishing income per day (£)		Fishing expenditure per day (£)	
	2021	2022	2021	2022	2021	2022
Area VIIA demersal trawl	1.11 ↑	1.50 ↑	1,611 →	2,057 ↑	1,111 ↓	1,518 ↑
Area VIIA nephrops over 250kW	1.13 →	1.15 →	2,061 →	2,889 ↑	1,330 →	2,021 ↑
Area VIIA nephrops under 250kW	0.66 ↓	0.68 →	1,191 →	1,720 ↑	693 ↓	1,048 ↑
Area VIIBCDEFGHK 24-40m	1.89 →	2.05 ↑	5,046 ↑	6,330 ↑	3,885 ↑	5,213 ↑
Area VIIBCDEFGHK trawlers 10-24m	0.54 ↓	0.55 →	1,285 →	1,740 ↑	664 →	964 ↑
North Sea beam trawl over 300kW	1.66 ↓	1.67 →	2,021 ↓	5,127 ↑	3,973 →	7,876 ↑
North Sea beam trawl under 300kW	0.31 ↓	0.24 ↓	793 ↓	903 ↑	624 ↓	1,168 ↑
North Sea nephrops over 300kW	1.44 ↑	1.37 →	3,410 ↑	4,110 ↑	2,498 ↑	3,267 ↑
North Sea nephrops under 300kW	0.54 ↑	0.56 →	1,192 ↑	1,534 ↑	900 ↑	1,245 ↑
NSWOS demersal over 24m	4.42 →	4.73 ↑	8,113 →	10,667 ↑	5,691 →	7,935 ↑
NSWOS demersal pair trawl seine	4.59 ↓	5.12 ↑	7,923 →	8,718 ↑	5,504 →	6,357 ↑
NSWOS demersal seiners	3.22 ↓	3.64 ↑	4,988 ↓	8,715 ↑	3,417 →	6,006 ↑
NSWOS demersal under 24m over 300kW	2.22 →	2.11 →	5,038 ↑	5,482 ↑	3,374 ↑	4,040 ↑
NSWOS demersal under 24m under 300kW	0.95 →	0.82 ↓	2,128 →	2,510 ↑	1,477 ↑	1,771 ↑
WOS nephrops over 250kW	0.76 ↑	0.72 →	1,634 ↑	2,201 ↑	1,051 ↑	1,516 ↑
WOS nephrops under 250kW	0.48 ↑	0.47 →	1,100 ↑	1,514 ↑	722 ↑	1,031 ↑
South West beamers over 250kW	1.34 →	1.44 ↑	5,037 ↑	6,469 ↑	3,600 ↑	5,024 ↑
South West beamers under 250kW	0.83 →	0.85 →	3,102 ↑	3,705 ↑	1,969 ↑	2,535 ↑
UK scallop dredge over 15m	1.97 ↑	2.03 →	3,234 ↑	3,716 ↑	1,806 ↑	2,272 ↑
UK scallop dredge under 15m	1.11 ↓	1.04 ↓	1,874 ↑	2,248 ↑	877 ↑	1,160 ↑
Under 10m demersal trawl/seine	0.36 ↑	0.36 →	874 ↑	1,165 ↑	500 ↑	695 ↑
Under 10m drift and/or fixed nets	0.20 ↓	0.18 ↓	633 →	757 ↑	294 ↓	370 ↑
Under 10m pots and traps	0.24 ↓	0.23 →	866 ↑	956 ↑	459 ↑	537 ↑
Under 10m using hooks	0.18 ↓	0.17 →	712 →	790 ↑	308 →	356 ↑
Gill netters	1.77 ↓	1.84 →	3,707 ↑	3,933 ↑	2,293 ↑	2,526 ↑
Longliners	1.00 →	1.12 ↑	2,212 ↑	2,811 ↑	1,394 →	1,971 ↑
Pots and traps 10-12m	0.35 →	0.41 ↑	1,223 ↑	1,365 ↑	589 ↑	692 ↑
Pots and traps over 12m	1.18 →	1.04 ↓	2,991 ↑	3,118 →	1,845 ↑	2,047 ↑

↑ Increase of >5% compared to previous year

→ Change in the range of -/+5% compared to previous year

↓ Decrease of >5% compared to previous year

Operating costs

Definitions

Fishing vessels incur a range of operating costs which are split into two groups: fishing costs and vessel costs.

Fishing costs vary depending on the amount of vessel activity and the value and weight of landings (i.e. variable costs). Fishing costs cover several elements, of which crew share (wages), and fuel and oil are the most substantial. Other items grouped under fishing costs include boxes, ice, food and stores, sales commissions, harbour dues, subscriptions and levies, shore labour, travel costs and quota leasing.

Vessel costs are independent of, or not directly related to, the level of vessel activity during the year (i.e. fixed costs). These costs include gear and vessel repairs, insurance, administration and the purchase, hire and maintenance of electronic equipment.

Total operating costs

Following a drop in operating costs in 2020 due to lower levels of activity and fuel prices, total operating costs increased again in 2021, although they were still below 2019 figures for most segments. In 2022, driven by high fuel prices, operating costs increased for all segments but two: Area 7A demersal trawl and NSWoS demersal trawlers under 24m under 300kW, which had reduced levels of activity in 2022.

Total operating costs, which on average had stayed at 85% of income in 2019 and 2020, increased to nearly 90% of income in 2021 and 2022, again largely driven by a higher expenditure on fuel, both in total terms and as a percentage of fishing income.

TABLE 4: Average annual operating costs, 2021-22

Segment	Average annual operating costs (£)		Operating costs as % of income		Fuel costs as % of income	
	2021	2022	2021	2022	2021	2022
Area VIIA demersal trawl	270,601 ↑	224,522 ↓	88% →	99% ↑	22% ↑	33% ↑
Area VIIA nephrops over 250kW	285,347 ↑	445,885 ↑	85% ↑	93% ↑	17% →	24% ↑
Area VIIA nephrops under 250kW	113,175 ↑	176,986 ↑	77% ↑	83% ↑	13% →	18% ↑
Area VIIBCDEFGHK 24-40m	1,387,541 ↑	1,569,015 ↑	98% →	103% ↑	21% →	31% ↑
Area VIIBCDEFGHK trawlers 10-24m	143,461 ↑	205,618 ↑	80% →	84% →	16% →	21% ↑
North Sea beam trawl over 300kW	1,057,357 →	1,441,603 ↑	207% ↑	166% ↓	142% ↑	100% ↓
North Sea beam trawl under 300kW	62,833 ↓	85,595 ↑	103% ↑	153% ↑	47% ↑	76% ↑
North Sea nephrops over 300kW	629,200 ↑	755,691 ↑	91% →	97% ↑	22% →	35% ↑
North Sea nephrops under 300kW	107,623 →	155,133 ↑	85% →	90% ↑	28% ↑	40% ↑
NSWOS demersal over 24m	1,553,793 ↑	2,197,569 ↑	90% →	94% →	22% →	29% ↑
NSWOS demersal pair trawl seine	1,156,262 ↓	1,694,333 ↑	87% →	91% →	9% →	15% ↑
NSWOS demersal seiners	957,463 →	1,764,554 ↑	93% ↑	93% →	14% →	15% →
NSWOS demersal under 24m over 300kW	907,689 ↑	924,427 →	83% →	90% ↑	18% →	28% ↑
NSWOS demersal under 24m under 300kW	221,431 ↓	208,031 ↓	105% ↑	99% ↓	15% →	22% ↑
WOS nephrops over 250kW	260,944 ↑	362,626 ↑	93% →	99% ↑	20% →	28% ↑
WOS nephrops under 250kW	165,870 ↑	203,585 ↑	97% ↑	101% →	17% →	22% ↑
South West beamers over 250kW	948,325 ↑	1,344,912 ↑	88% ↓	94% ↑	26% →	37% ↑
South West beamers under 250kW	545,966 ↑	696,326 ↑	81% →	86% ↑	17% →	25% ↑
UK scallop dredge over 15m	470,141 ↑	557,142 ↑	83% →	89% ↑	16% →	25% ↑
UK scallop dredge under 15m	151,901 ↑	199,102 ↑	89% ↑	94% →	12% →	19% ↑
Under 10m demersal trawl/seine	54,705 ↑	77,144 ↑	84% ↑	87% →	10% →	14% →
Under 10m drift and/or fixed nets	26,879 ↓	29,799 ↑	67% ↑	70% →	7% →	11% →
Under 10m pots and traps	49,215 →	54,979 ↑	69% →	72% →	7% →	12% ↑
Under 10m using hooks	24,197 ↓	27,220 ↑	61% ↓	63% →	5% →	8% →
Gill netters	516,964 ↑	591,411 ↑	88% →	90% →	7% →	11% →
Longliners	286,148 ↓	413,319 ↑	80% ↓	87% ↑	26% →	39% ↑
Pots and traps 10-12m	125,366 ↑	134,192 ↑	68% →	70% →	5% →	9% →
Pots and traps over 12m	448,987 ↑	455,963 →	80% →	84% →	10% →	17% ↑

↑ Increase of >5% compared to previous year

→ Change in the range of -/+5% compared to previous year

↓ Decrease of >5% compared to previous year

Fuel

The price of marine fuel closely follows trends in oil price. After the shock of the Covid-19 pandemic, which resulted in low oil prices (37p per litre on average over the year) due to the sharp fall in demand, oil prices increased in 2021 to around 50p per litre by the end of the year, as demand rose on par with the recovery of economic activity.

This trend continued into early 2022, but in February the picture changed dramatically. The Russian invasion of Ukraine led many Western countries to impose sanctions on Russian oil exports, and Russia to restrict energy supplies to Europe, all of which drove oil prices up. While the UK is not dependent on Russian oil and gas, it is vulnerable to the high prices that these achieved in international markets, particularly more so as the pound weakened against the US dollar in 2022. As a result, the average price of marine fuel in the UK increased by 30% between February and March 2022, followed by a further 28% increase between March and July, when it reached nearly £1 per litre. Average prices began to decrease in the second half of 2022 but were still higher than at any time in the previous five-year period.

The fuel costs of the UK fishing fleet reflect changes in fuel price. Overall fuel costs increased in 2021 for all segments but one (NSWoS demersal trawlers under 24m under 300kW, which had lower levels of activity in 2021), but were lower than in 2019, as 2021 fuel prices were lower than in 2019 for most of the year. The picture changed dramatically in 2022 and fuel expenditure increased for all segments regardless of the number of days spent at sea and their fuel consumption. On average fuel expenditure in 2022 was double of what it was in 2019.

FIGURE 14: Oil price and marine fuel price
(Source: Seafish, U.S. Energy Information Administration)

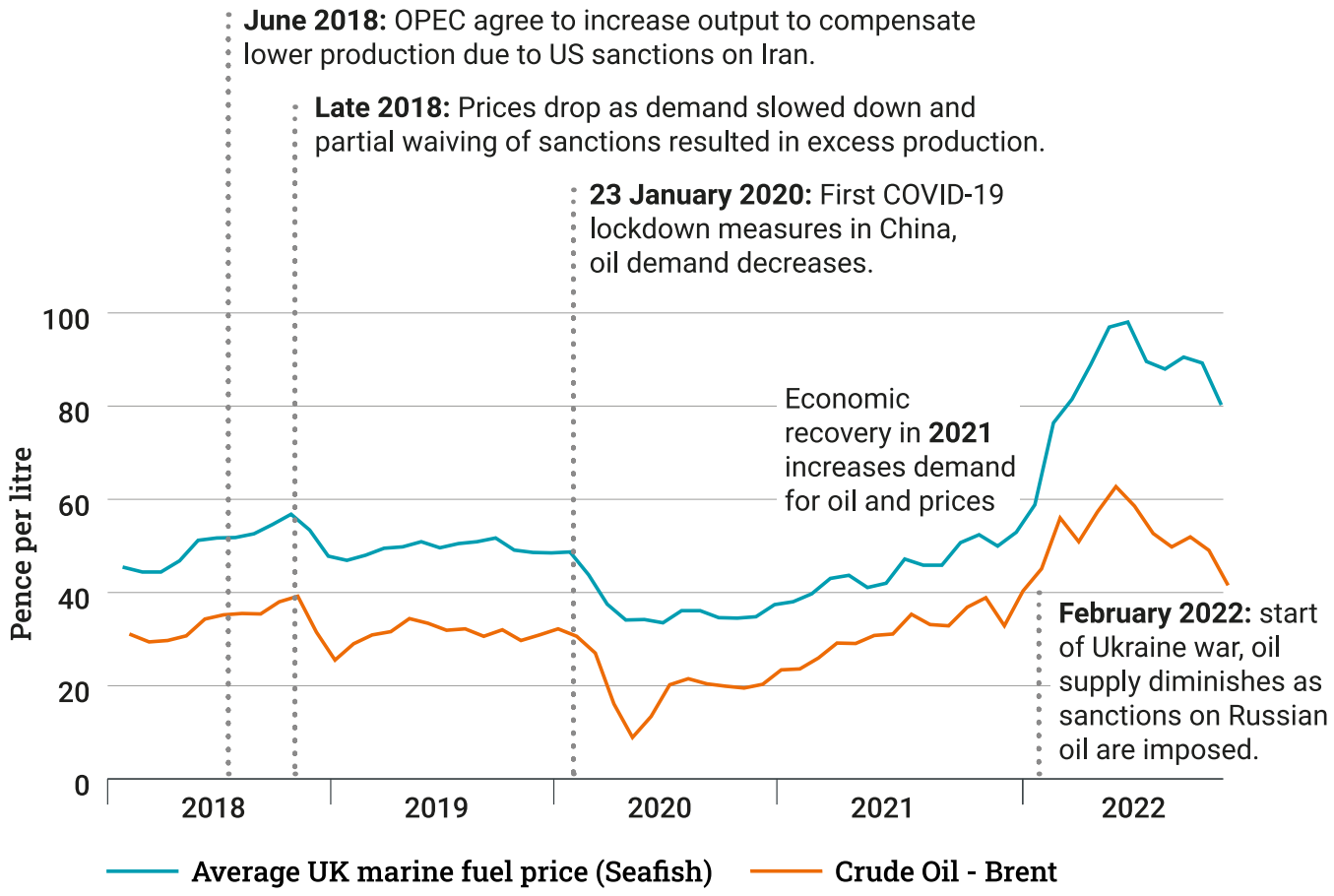


TABLE 5: Average annual and daily fuel costs per vessel, 2021-22

Segment	Fuel costs (£)		Fuel costs per day (£)		Litres per day	
	2021	2022	2021	2022	2021	2022
Area VIIA demersal trawl	66,582 ↑	73,929 ↑	373 ↑	670 ↑	825 ↓	805 →
Area VIIA nephrops over 250kW	56,903 ↑	112,443 ↑	366 ↑	699 ↑	829 →	821 →
Area VIIA nephrops under 250kW	18,944 ↑	39,384 ↑	160 ↑	317 ↑	359 →	371 →
Area VIIBCDEFGHK 24-40m	291,747 ↑	466,933 ↑	1,042 ↑	1,951 ↑	2,303 →	2,378 →
Area VIIBCDEFGHK trawlers 10-24m	28,290 ↑	52,279 ↑	203 ↑	370 ↑	446 →	450 →
North Sea beam trawl over 300kW	723,337 ↑	871,477 ↑	2,952 ↑	5,287 ↑	6,500 →	6,500 →
North Sea beam trawl under 300kW	28,716 ↑	42,726 ↑	371 ↑	690 ↑	821 →	885 ↑
North Sea nephrops over 300kW	154,778 ↑	273,131 ↑	801 ↑	1,510 ↑	1,776 ↑	1,806 →
North Sea nephrops under 300kW	35,338 ↑	69,595 ↑	352 ↑	657 ↑	775 →	793 →
NSWOS demersal over 24m	370,965 ↑	681,434 ↑	1,789 ↑	3,195 ↑	3,953 ↑	3,893 →
NSWOS demersal pair trawl seine	116,434 ↑	278,172 ↑	719 ↑	1,339 ↑	1,579 →	1,594 →
NSWOS demersal seiners	149,430 ↑	287,591 ↑	743 ↑	1,361 ↑	1,638 →	1,635 →
NSWOS demersal under 24m over 300kW	191,988 ↑	291,656 ↑	947 ↑	1,653 ↑	2,094 ↑	2,013 →
NSWOS demersal under 24m under 300kW	31,783 ↓	46,758 ↑	340 ↑	568 ↑	751 →	674 ↓
WOS nephrops over 250kW	56,021 ↑	101,938 ↑	353 ↑	651 ↑	782 →	779 →
WOS nephrops under 250kW	28,696 ↑	44,385 ↑	193 ↑	343 ↑	428 →	414 →
South West beamers over 250kW	276,908 ↑	531,210 ↑	1,291 ↑	2,401 ↑	2,850 ↑	2,914 →
South West beamers under 250kW	111,979 ↑	203,490 ↑	518 ↑	935 ↑	1,142 →	1,130 →
UK scallop dredge over 15m	89,360 ↑	155,027 ↑	517 ↑	925 ↑	1,147 →	1,112 →
UK scallop dredge under 15m	21,342 ↑	40,452 ↑	240 ↑	437 ↑	529 →	521 →
Under 10m demersal trawl/seine	6,564 ↑	12,509 ↑	92 ↑	170 ↑	201 →	202 →
Under 10m drift and/or fixed nets	2,760 ↑	4,567 ↑	45 ↑	83 ↑	98 →	98 →
Under 10m pots and traps	5,083 ↑	9,389 ↑	65 ↑	123 ↑	142 →	144 →
Under 10m using hooks	1,933 ↑	3,347 ↑	35 ↑	61 ↑	76 →	71 ↓
Gill netters	38,472 ↑	73,202 ↑	245 ↑	443 ↑	538 →	535 →
Longliners	92,624 ↑	183,056 ↑	585 ↑	1,107 ↑	1,282 ↓	1,343 ↑
Pots and traps 10-12m	10,119 ↑	17,635 ↑	70 ↑	131 ↑	153 →	155 →
Pots and traps over 12m	54,296 ↑	93,895 ↑	295 ↑	549 ↑	648 →	652 →

↑ Increase of >5% compared to previous year

→ Change in the range of -/+5% compared to previous year

↓ Decrease of >5% compared to previous year

Crew costs

The total number of full-time equivalent employees (FTEs) in the fleet decreased by 6% in 2022 compared to 2021 (from 6,955 to 6,557), reflecting lower levels of activity. This decrease may not necessarily mean that jobs were lost: it may also reflect that crews worked fewer hours or fewer trips in an attempt to lower the fuel bill, as some owners reported during the 2022 survey.

Crew share is strongly linked with fishing income and costs. Many fishermen are paid a share of the vessel earnings, usually after deducting some direct costs such as fuel. Crew costs (i.e., total expenditure in crew, including crew shares, salaries and agency payments) across segments therefore reflect the variability in vessel earnings.

The average crew cost per vessel decreased noticeably for most segments in 2020 as fishing income in those segments decreased; but increased again in 2021 for most segments as days at sea and fishing income increased post-Covid. However, crew expenditure in 2021 was still 12% lower than in 2019, on average.

It is too early to assess the impacts of high fuel prices of 2022 on crew shares as 2022 financial accounts are not available yet. Preliminary estimates indicate that crew costs in 2022 increased for most fleet segments due to higher fishing income, but these estimates will need to be revised once accounts are available. Several vessel owners interviewed during the 2022 survey reported that it was a struggle to find crew and that high fuel costs were driving crew shares down.

TABLE 6: Average annual crew costs and FTEs, 2021-22

Segment	Average crew costs per vessel (£)		FTE (Total)		Crew costs per FTE	
	2021	2022	2021	2022	2021	2022
Area VIIA demersal trawl	84,528 ↑	56,298 ↓	43 ↑	29 ↓	13,901 ↓	13,782 →
Area VIIA nephrops over 250kW	98,520 ↑	138,394 ↑	236 ↑	202 ↓	12,109 ↓	16,430 ↑
Area VIIA nephrops under 250kW	49,353 ↓	69,740 ↑	100 →	95 →	14,783 ↓	19,784 ↑
Area VIIBCDEFGHK 24-40m	290,491 ↑	238,719 ↓	218 ↑	216 →	15,990 ↓	15,491 →
Area VIIBCDEFGHK trawlers 10-24m	41,137 ↑	51,969 ↑	80 ↓	91 ↑	22,635 ↑	25,695 ↑
North Sea beam trawl over 300kW	108,182 ↓	184,652 ↑	124 ↓	95 ↓	4,355 ↓	11,641 ↑
North Sea beam trawl under 300kW	19,579 ↓	17,860 ↓	32 →	25 ↓	10,483 ↓	11,434 ↑
North Sea nephrops over 300kW	199,022 ↑	172,074 ↓	650 ↑	658 →	21,447 ↑	19,883 ↓
North Sea nephrops under 300kW	39,798 ↑	41,485 →	131 ↓	129 →	18,771 ↑	18,303 →
NSWOS demersal over 24m	432,778 →	501,954 ↑	504 ↓	479 →	35,217 ↑	40,901 ↑
NSWOS demersal pair trawl seine	321,070 ↓	401,832 ↑	241 ↓	269 ↑	34,623 ↓	32,881 →
NSWOS demersal seiners	255,025 ↓	462,068 ↑	192 ↑	181 ↓	27,914 ↓	48,585 ↑
NSWOS demersal under 24m over 300kW	233,000 ↑	175,726 ↓	154 ↓	118 ↓	36,212 →	32,642 ↓
NSWOS demersal under 24m under 300kW	46,763 ↓	41,580 ↓	36 ↓	25 ↓	12,878 ↓	13,512 ↑
WOS nephrops over 250kW	69,578 ↑	80,734 ↑	155 ↑	154 →	13,019 ↓	15,218 ↑
WOS nephrops under 250kW	57,614 ↑	63,925 ↑	313 ↑	244 ↓	10,129 ↓	13,371 ↑
South West beamers over 250kW	263,298 ↑	273,055 →	224 ↑	227 →	27,043 ↓	26,463 →
South West beamers under 250kW	177,285 ↑	184,230 →	150 ↑	164 ↑	23,641 ↓	24,702 →
UK scallop dredge over 15m	166,702 ↑	163,481 →	394 ↑	384 →	26,677 ↓	27,250 →
UK scallop dredge under 15m	35,433 ↑	40,174 ↑	224 ↑	220 →	27,476 ↑	30,133 ↑
Under 10m demersal trawl/seine	18,310 ↑	23,701 ↑	148 ↑	155 ↑	21,450 →	26,758 ↑
Under 10m drift and/or fixed nets	11,434 ↓	11,662 →	81 ↑	74 ↓	27,646 ↓	31,489 ↑
Under 10m pots and traps	21,315 ↑	21,201 →	707 ↑	632 ↓	35,163 ↑	35,770 →
Under 10m using hooks	11,773 ↑	12,423 ↑	87 →	84 →	30,948 ↑	33,812 ↑
Gill netters	215,418 ↑	225,094 →	148 ↓	176 ↑	37,798 ↑	37,057 →
Longliners	104,693 →	112,253 ↑	153 →	169 ↑	17,775 →	17,290 →
Pots and traps 10-12m	49,670 ↑	48,804 →	361 →	320 ↓	23,695 ↑	24,681 →
Pots and traps over 12m	200,612 ↑	174,128 ↓	661 ↓	577 ↓	31,585 →	30,480 →

↑ Increase of >5% compared to previous year

→ Change in the range of -/+5% compared to previous year

↓ Decrease of >5% compared to previous year

Economic Performance

The economic performance of the UK fishing fleet is measured here in terms of operating profit, net profit and Gross Value Added (GVA).

Profit

The reduction in fishing activity, income and market prices in 2020 had a largely negative impact on fleet profits. Trends in 2021 were mixed: approximately half of the segments saw their average operating profits increase compared to 2020, while the rest continued to decrease, particularly for demersal and Nephrops vessels as prices of these species did not recover fully from the 2020 shock.

Operating profit margins in 2021 decreased for most segments, even for those that had seen their operating profit increase. Static gear segments were among those that sustained or increased their operating profit margins in 2021.

Preliminary estimates of operating profit in 2022 show that average profit per vessel and operating profit margins decreased in 2022 for most segments, as operating costs increased in a greater proportion than income.

Net profit margins fell for most segments in 2020, to an overall average of 7% although with great variation among segments. Not all segments recovered in 2021, and for approximately half of them net profit margins continued to fall. Segments using static gears experienced a recovery in 2021 and saw their net profit margins increase by an average of 11 percentage points, resulting in higher margins than in 2019 for most of them.

TABLE 7: Average operating profit per vessel and net profit margin, 2021-22

Segment	Operating profit (£)		Operating profit margin		Net profit margin
	2021	2022	2021	2022	2021
Area VIIA demersal trawl	37,477 ↑	2,881 ↓	12% →	1% ↓	8% ↑
Area VIIA nephrops over 250kW	51,450 ↓	32,808 ↓	15% ↓	7% ↓	1% ↓
Area VIIA nephrops under 250kW	33,623 ↓	37,038 ↑	23% ↓	17% ↓	12% ↓
Area VIIBCDEFGHK 24-40m	29,767 ↓	-49,523 ↓	2% ↓	-3% ↓	2% ↓
Area VIIBCDEFGHK trawlers 10-24m	35,908 →	39,980 ↑	20% ↓	16% ↓	15% ↓
North Sea beam trawl over 300kW	-547,140 ↓	-570,732 →	-107% ↓	-66% ↑	-107% ↓
North Sea beam trawl under 300kW	-1,513 ↓	-29,660 ↓	-3% ↓	-53% ↓	-44% ↓
North Sea nephrops over 300kW	61,339 ↑	22,821 ↓	9% ↑	3% ↓	-7% ↓
North Sea nephrops under 300kW	19,571 →	17,339 ↓	15% ↓	10% ↓	12% ↑
NSWOS demersal over 24m	172,783 ↓	137,020 ↓	10% ↓	6% ↓	1% ↓
NSWOS demersal pair trawl seine	167,767 ↓	174,167 →	13% ↓	9% ↓	0% ↓
NSWOS demersal seiners	77,987 ↓	135,735 ↑	8% ↓	7% ↓	-5% ↓
NSWOS demersal under 24m over 300kW	183,757 ↑	109,007 ↓	17% ↑	11% ↓	10% ↑
NSWOS demersal under 24m under 300kW	-11,131 ↓	2,212 ↑	-5% ↓	1% ↑	-9% ↓
WOS nephrops over 250kW	18,491 ↓	5,033 ↓	7% ↓	1% ↓	-2% ↓
WOS nephrops under 250kW	4,708 ↓	-1,055 ↓	3% ↓	-1% ↓	-6% ↓
South West beamers over 250kW	133,599 ↑	86,166 ↓	12% ↑	6% ↓	10% ↑
South West beamers under 250kW	128,470 ↑	110,431 ↓	19% ↓	14% ↓	16% ↓
UK scallop dredge over 15m	94,862 ↑	72,632 ↓	17% ↑	12% ↓	9% ↑
UK scallop dredge under 15m	19,609 ↓	13,939 ↓	11% ↓	7% ↓	1% ↓
Under 10m demersal trawl/seine	10,149 ↓	11,294 ↑	16% ↓	13% ↓	9% ↓
Under 10m drift and/or fixed nets	13,369 ↓	12,847 →	33% ↓	30% ↓	25% ↓
Under 10m pots and traps	22,292 ↑	21,279 →	31% ↑	28% ↓	19% ↑
Under 10m using hooks	15,744 ↑	16,177 →	39% ↑	37% ↓	36% ↑
Gill netters	72,827 ↑	65,730 ↓	12% ↑	10% ↓	9% ↑
Longliners	70,307 ↑	60,218 ↓	20% ↑	13% ↓	20% ↑
Pots and traps 10-12m	60,449 ↑	57,516 →	33% →	30% ↓	24% ↑
Pots and traps over 12m	115,768 ↑	88,806 ↓	21% ↑	16% ↓	14% ↑

↑ Increase of >5% compared to previous year

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↓ Decrease of >5% compared to previous year

Gross Value Added (GVA)

GVA is a measure of the value of goods and services produced by an industry. In this report we calculate GVA as the sum of operating profit and crew share.

Average GVA per vessel decreased in most segments in 2020 compared to 2019 because of lower fishing revenues and crew shares. In 2021 most segments experienced an increase in average GVA per vessel ranging between 5% and 71% as crew shares and in some cases, operating profits, increased. The greatest increase occurred for NS Nephrops vessels over 300kW, which recovered to a figure similar to that of 2019 after experiencing a noticeable decrease in operating profit in 2020 when landings and prices of Nephrops fell.

Trends in GVA per vessel in 2022 were mixed, as operating profits fell in most segments, but preliminary estimates of crew shares show an increase thanks to a higher fishing income. In some segments, such as Area 7A Nephrops over 250kW or NSWoS demersal trawlers over 24m, average GVA per vessel increased despite lower operating profits in 2022, compensated by the increase in crew shares. However, these figures will need to be revised once 2022 costs structures, specifically crew shares, are available.

TABLE 8: Average annual GVA per vessel and GVA per FTE, 2021-22

Segment	Gross value added (£)		GVA as % of total income		GVA per FTE (£ per FTE)	
	2021	2022	2021	2022	2021	2022
Area VIIA demersal trawl	122,005	59,180	40%	26%	20,064	14,487
Area VIIA nephrops over 250kW	149,970	171,202	45%	36%	18,432	20,325
Area VIIA nephrops under 250kW	82,976	106,778	57%	50%	24,854	30,292
Area VIIBCDEFGHK 24-40m	320,258	189,196	23%	13%	17,628	12,277
Area VIIBCDEFGHK trawlers 10-24m	77,045	91,950	43%	37%	42,393	45,462
North Sea beam trawl over 300kW	-438,957	-386,080	-86%	-44%	-17,670	-24,339
North Sea beam trawl under 300kW	18,066	-12,807	30%	-23%	9,672	-8,199
North Sea nephrops over 300kW	260,361	194,896	38%	25%	28,057	22,520
North Sea nephrops under 300kW	59,369	58,824	47%	34%	28,001	25,953
NSWOS demersal over 24m	605,560	638,974	35%	27%	49,277	52,065
NSWOS demersal pair trawl seine	488,836	575,999	37%	31%	52,715	47,133
NSWOS demersal seiners	333,013	597,802	32%	32%	36,450	62,857
NSWOS demersal under 24m over 300kW	416,758	284,733	38%	28%	64,770	52,890
NSWOS demersal under 24m under 300kW	35,631	43,792	17%	21%	9,813	14,230
WOS nephrops over 250kW	88,069	85,767	32%	23%	16,479	16,166
WOS nephrops under 250kW	62,322	62,869	37%	31%	10,957	13,150
South West beamers over 250kW	396,897	359,221	37%	25%	40,764	34,813
South West beamers under 250kW	305,756	294,661	45%	37%	40,773	39,509
UK scallop dredge over 15m	261,564	236,113	46%	38%	41,857	39,357
UK scallop dredge under 15m	55,042	54,113	32%	25%	42,681	40,588
Under 10m demersal trawl/seine	28,459	34,994	44%	40%	33,339	39,509
Under 10m drift and/or fixed nets	24,803	24,509	62%	58%	59,972	66,178
Under 10m pots and traps	43,607	42,479	61%	56%	71,938	71,672
Under 10m using hooks	27,518	28,601	69%	66%	72,334	77,842
Gill netters	288,244	290,823	49%	44%	50,577	47,878
Longliners	175,000	172,471	49%	36%	29,713	26,566
Pots and traps 10-12m	110,119	106,320	59%	56%	52,532	53,769
Pots and traps over 12m	316,380	262,933	56%	48%	49,812	46,024

↑ Increase of >5% compared to previous year

→ Change in the range of -/+5% compared to previous year

↓ Decrease of >5% compared to previous year

Methods

The collection of economic data on the UK fishing fleet is a staged process involving government administrations, vessel owners, accountancy firms and Seafish.

Government administrations data collection

Government administrations gather data on vessel numbers and characteristics, catch, landings, sales, gear type and fishing effort (days at sea). This information is transmitted to a central UK database which retains logbook, sales notes and fleet register data.

Seafish data collection

Seafish gathers a sample of vessels financial data via our Annual Survey of the UK Fishing Fleet. To ensure an adequate sample size we use a self-selecting stratified sampling approach, i.e., we survey enough vessel owners from each segment who choose to participate in the survey.

The questionnaire allows vessel owners to share information about the current picture of their fishing businesses, such as employment, fuel use or capital value indicators. The questionnaire also allows owners to grant Seafish permission to access their full financial data for the previous year (as accounts for the current year are not finalised at the time of survey). In 2022 Seafish collected 303 sets of 2021 financial accounts (7% of the active UK fleet).

Fleet segmentation

The Seafish economic database includes all vessels recorded in the UK fishing fleet register that are active during the year considered. This includes all vessel types, gear types and activity levels. We define groups or fleet segments of relatively similar vessels so we can provide information on the operational and financial performance of groups of comparable vessels.

Each fleet segment has a set of mutually exclusive criteria that define which vessels are included in it for each year. Every single active vessel will fit into only one segment each year. Criteria are based on the physical

characteristics of the vessels, activity level, the gear used, species targeted and areas fished. For this report we have defined 32 Seafish segments to categorise the UK fleet as shown in the Segmentation Criteria table. Individual vessels may be included in different segments in different years depending on their activity and gear use. Segments must contain at least five vessels so that reliable data can be collected, robust estimates of costs and profits can be produced, and confidentiality is protected. If fewer than five vessels fall into one segment in a given year, they are instead included within the 'Miscellaneous' fleet segment.

Costs and earnings estimation

Declared fishing income is available from the government data set for every active vessel in the fleet. Hence fishing income is the most reliable financial figure we produce.

We allocate costs structure and non-fishing income data from the sampled vessel accounts to particular fleet segments. We then extrapolate costs and non-fishing income to all vessels in the segment using official statistics on effort and fishing income covering every vessel.

Within each fleet segment we add individual cost items from the collected vessel financial accounts (the segment sample) to create a 'combined segment sample cost structure'.

We then calculate, for all vessels in a segment, the sum of each cost item in the 'combined segment sample cost structure' as a proportion of the sum of fishing income. For example:

a) The sum of gear costs is 10% of the sum of fishing income for this group of vessels;

b) The sum of sales commission is 3% of the sum of fishing income, etc.

Fuel costs and crew share costs are calculated differently from other costs. To calculate fuel costs, we use the vessel capacity (VCUs) and days at sea for the year to estimate the vessel's fuel consumption. This figure is then multiplied by the average annual red diesel price (excluding duty) to estimate total annual fuel costs. To calculate crew share costs we use a system resembling how crew share is estimated in practice. Fishing costs are deducted from fishing income and the remainder is split between

the crew and the vessel. We allocate a minimum of £100 per day where the actual observed amount within the 'combined segment sample cost structure' is lower to reflect the market value of the labour.

We then apply the proportions from all other costs within the 'combined segment sample cost structure' to the official declared fishing income for each vessel. This enables us to calculate Gross Value Added, operating profit and net profit for all vessels in each fleet segment.

Employment data

Employment estimates are based on the data collected from vessel owners during the fleet survey combined with MMO employment data. This process provides details of the number of engaged crew, both full-time and part-time.

With this sample information we estimate total engaged crew based on the physical characteristics of each individual vessel and the vessel's level of activity. Once the total engaged crew is estimated for all vessels in the UK fleet, we estimate Full Time Equivalent (FTE) jobs based on hours worked by crew as reported by skippers. One full time job is assumed to be 2,000 hours worked a year.

2022 estimates

Figures presented for the year 2021 are estimates based on Government data and data collected by Seafish. Figures for 2022 are preliminary estimates using provisional official statistics on landings, numbers of vessels and effort, along with actual annual average 2022 fuel prices and previous years' cost structures. Seafish will revise these estimates when final government data and 2022 vessel accounts are available.

TABLE 8: Segmentation criteria table

Segment	Main area	Main DAS gear
Area VIIA demersal trawl over 10m	VIIA	Demersal trawls and seines
Area VIIA nephrops over 250kW	VIIA	Demersal trawls and seines
Area VIIA nephrops under 250kW	VIIA	Demersal trawls and seines
Area VIIB-K trawlers 10-24m	VIIDE, VIIFG, VII other	Demersal trawls and seines
Area VIIB-K trawlers 24-40m	VIIDE, VIIFG, VII other	Demersal trawls and seines
UK gill netters over 10m		Drift nets and fixed nets
UK longliners over 10m		Gear using hooks
Low activity vessels over 10m		
Low activity vessels under 10m		
Miscellaneous vessels over 10m		
North Sea beam trawl over 300kW	NS	Beam Trawl
North Sea beam trawl under 300kW	NS	Beam Trawl
North Sea nephrops trawl over 300kW	NS	Demersal trawls and seines
North Sea nephrops trawl under 300kW	NS	Demersal trawls and seines
NS & WOS demersal trawl over 24m	NS, WOS	Demersal trawls and seines
NSWOS demersal pair trawls and Seines	NS, WOS	Demersal trawls and seines
NSWOS demersal seiners	NS, WOS	Demersal trawls and seines
NSWOS demersal trawl under 24m, over 300kW	NS, WOS	Demersal trawls and seines
NSWOS demersal trawl under 24m, under 300kW	NS, WOS	Demersal trawls and seines
UK pelagic trawl over 40m		Pelagic: trawl, seiner/purse seiner
UK pots and traps 10m-12m		Pots and traps
UK pots and traps over 12m		Pots and traps
South West beam trawl under 250kW	VIIDE, VIIFG, VII other	Beam trawl
South West beam trawl over 250kW	VIIDE, VIIFG, VII other	Beam trawl
UK demersal trawls and seines under 10m		Demersal trawls and seines
UK drift and fixed nets under 10m		Drift nets and fixed nets
UK pots and traps under 10m		Pots and traps
UK hooks under 10m		Gear using hooks
WOS nephrops trawl over 250kW	WOS	Demersal trawls and seines
WOS nephrops trawl under 250kW	WOS	Demersal trawls and seines
UK scallop dredge over 15m		Dredges
UK scallop dredge under 15m		Dredges

TABLE 8: Segmentation criteria table (continued)

Segment	Main species by value	Main gear type	Power main engine	Vessel length	Value of landings
Area VIIA demersal trawl over 10m				>=10m	
Area VIIA nephrops over 250kW	Nephrops		>=250kW	>=10m	
Area VIIA nephrops under 250kW	Nephrops		<250kW	>=10m	
Area VIIB-K trawlers 10-24m	Not Nephrops			>= 10m & <24m	
Area VIIB-K trawlers 24-40m	Not Nephrops			>=24m & < 40m	
UK gill netters over 10m	Not Nephrops			>=10m	
UK longliners over 10m	Not Nephrops			>=10m	
Low activity vessels over 10m				>= 10m	<£10,000
Low activity vessels under 10m				<10m	<£10,000
Miscellaneous vessels over 10m				>=10m	
North Sea beam trawl over 300kW	Not Nephrops		>=300kW	>=10m	
North Sea beam trawl under 300kW	Not Nephrops		<300kW	>=10m	
North Sea nephrops trawl over 300kW	Nephrops		>=300kW	>=10m	
North Sea nephrops trawl under 300kW	Nephrops		<300kW	>=10m	
NS & WOS demersal trawl over 24m	Not Nephrops			>=24m	
NSWOS demersal pair trawls and Seines	Not Nephrops	Paired Trawl		>=10m	
NSWOS demersal seiners	Not Nephrops	Scottish Seiner		>=10m	
NSWOS demersal trawl under 24m, over 300kW	Not Nephrops		>=300kW	>=10m & <24m	
NSWOS demersal trawl under 24m, under 300kW	Not Nephrops		<300kW	>=10m & < 24m	
UK pelagic trawl over 40m	Mackerel			>=40m	
UK pots and traps 10m-12m				>=10m & <12m	
UK pots and traps over 12m				>=12m	
South West beam trawl under 250kW			<250kW	>=10m	
South West beam trawl over 250kW			>=250kW	>=10m	
UK demersal trawls and seines under 10m				<10m	
UK drift and fixed nets under 10m				<10m	
UK pots and traps under 10m				<10m	
UK hooks under 10m				<10m	
WOS nephrops trawl over 250kW	Nephrops		>=250kW	>=10m	
WOS nephrops trawl under 250kW	Nephrops		<250kW	>=10m	
UK scallop dredge over 15m	Scallops, Queen Scallops, Cockles			>=15m	
UK scallop dredge under 15m	Scallops, Queen Scallops, Cockles			<15m	

Glossary

Active vessel Any UK registered fishing vessel that recorded any amount of landings in the year considered.

Fishing costs Costs incurred by vessel owners because of their fishing activity. Fishing costs include fuel costs, crew shares, ice and boxes, sales commissions, harbour dues, subscriptions and levies, quota leasing, days at sea purchases, food and stores, travel costs and shore labour.

Fleet segment A group comprising vessels of similar characteristics in terms of level of activity, main gear used and/or area of operation.

FTE (Full-Time Equivalent) A standardised measure of employment, based on an employee working 37 hours per week, 52 weeks a year.

GDP (Gross Domestic Product) An indicator of the economic performance of a country.

GVA (Gross Value Added) A measure of the value of goods and services produced by an industry. In this report, GVA is calculated as the sum of operating profit and crew share.

Low activity vessel Any vessel that recorded a total value of landings under £10,000 in the year considered.

MSY Btrigger A biomass reference point that triggers a cautious response within the ICES MSY framework.

Net profit The result of subtracting finance costs, depreciation and interest costs from operating profit.

Operating costs Costs incurred by vessel owners. Operating costs comprise fishing costs, which are dependent on the level of fishing activity; and vessel costs, which tend to be fixed regardless of the level of activity.

Operating profit The difference between total income and operating costs.

Vessel costs Costs incurred by vessel owners regardless of the level of fishing activity. Vessel costs include gear and vessel repairs, insurance, electronic equipment and administration costs.

Acronyms

FTE Full-Time Equivalent

GDP Gross Domestic Product

GVA Gross Value Added

ICES International Council for the Exploration of the Sea

MMO Marine Management Organisation

MSY Maximum Sustainable Yield

NS North Sea

NSWoS North Sea and West of Scotland

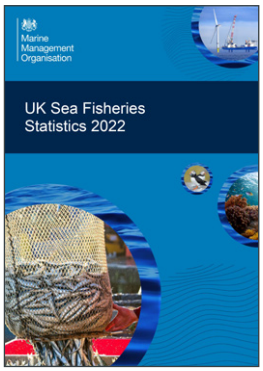
TAC Total Allowable Catch

VCU Vessel Capacity Unit

WC Western Channel

WoS West of Scotland

Further Reading

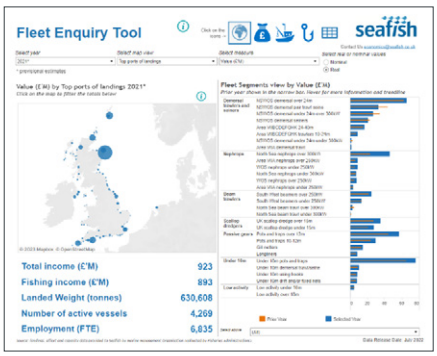


Marine Management Organisation: UK Sea Fisheries Statistics 2022

The Sea Fisheries Statistics include data on the structure, activity and landings of the UK fleet, overseas trade and the world's fishing industry. This report uses the same underlying dataset as the Sea Fisheries Statistics.

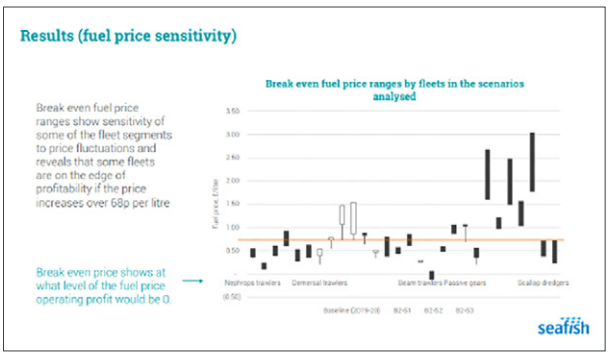
Marine Scotland: Scottish Sea Fisheries Statistics 2022

A detailed overview of landings of sea fish, the Scottish fishing fleet and the number of fishers employed in 2022.



Seafish Fleet Enquiry Tool

This online tool allows users to filter and subset bespoke groups of vessels and extract their size, structure and economic performance data. The tool is available via: https://public.tableau.com/app/profile/seafish/viz/FleetEnquiryTool/1Overview



Modelling impacts of the rising price of fuel

This analysis produced by Seafish in the first half of 2022, applied economic modelling and scenario analysis to assess the impact of increasing fuel prices across the UK fishing fleet. The report is available via: https://www.seafish.org/about-us/news-blogs/modelling-impacts-of-the-rising-price-of-fuel/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