

SEAFISH

Overview of the Welsh sea bass fishing fleet: 2016 update

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Sea Fish Industry Authority

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1. Executive Summary

- Here the ‘Welsh sea bass fleet’ is defined as Welsh-registered commercial fishing vessels that derive the largest proportion of their fishing income in the given year from sea bass. In 2016 the Welsh sea bass fleet comprised of 96 vessels, an increase of 11 vessels from 2015.
- The Welsh sea bass fleet is characterised by an average vessel length of 5.7m and engine power of 49kW (2008 to 2016). These small vessels are restricted to fishing inshore waters in good weather conditions.
- The primary gear types used by the Welsh sea bass fleet to target sea bass are low impact rod and line and nets, including drift and fixed nets.
- Following the sharp drop in overall effort and rod and line fishing effort in 2015, both increased dramatically in 2016, while drift and gill net fishing effort decreased slightly in 2016.
- Between 2008 and 2015 Wales contributed an average of 2% to total European sea bass landings.
- Sea bass landings by the core Welsh fleet increased 4% in 2016 and the contribution of the Welsh fleet to overall UK sea bass landings increased 3% for a total of 12% in 2016.
- The Welsh sea bass fishery is highly seasonal. Between 2008 and 2016 nearly half of all sea bass was landed between July and September (Quarter 3) and a further 35% was landed between April and June (Quarter 2), on average.
- From 2015 to 2016 the nominal value of all sea bass landings by Welsh vessels increased by over £67,000.
- On average the Welsh sea bass fleet is 71% reliant on sea bass as a primary target species in terms of total catch weight, and 90% reliant on this species in terms of its contribution to total fishing income.
- Between 2015 and 2016 total fishing income, total operating costs and GVA increased for the core Welsh sea bass fleet, resulting in a slight overall decrease in operating profits.
- The socio-economic contribution of the Welsh sea bass fishery to coastal communities ranges from direct income and employment, the supply of high quality product to local retail and hospitality businesses, to an indirect contribution in operational costs.

2. Fleet size, structure and activity

Table 1. Number of vessels in the Welsh sea bass fishing fleet and the main gear types utilised, 2008 to 2016. The total number of vessels has been split into ‘active’ and ‘less active’ vessels. Active vessels are defined as vessels that earned over £10,000 revenues from value of landed fish in a given calendar year, whereas less active vessels are vessels that earned less than £10,000 of revenues from fish landings in a given calendar year.

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Active Vessels	<5	11	5	12	13	15	20	16	14
Less active vessels	58	58	60	71	66	64	61	69	82
Total	62	69	65	83	79	79	81	85	96
Active vessels									
Drift and/or fixed nets	<5	10	<5	10	13	12	11	11	14
Rod and Line	<5	10	<5	7	11	9	14	11	12
Less active vessels									
Drift and/or fixed nets	30	32	34	50	48	33	32	44	50
Rod and Line	42	47	49	51	45	45	38	42	61

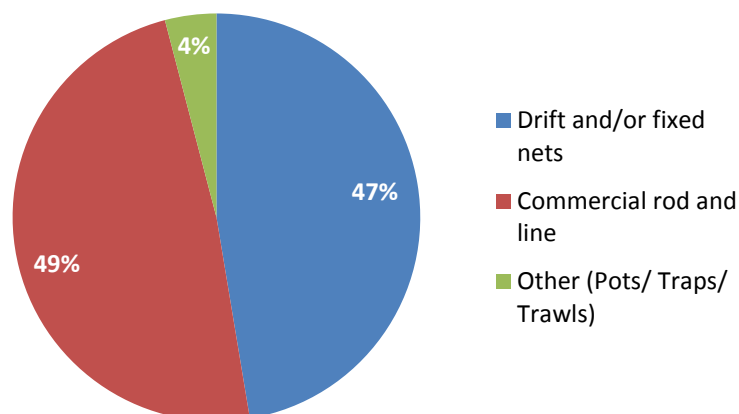


Figure 1. Share of fishing effort (days at sea) by the Welsh sea bass fishing fleet by gear type (including active and less active vessels), 2008 to 2016. Please note that ‘Other’ gear types such as posts and traps and trawling are used by this fleet segment to target other species, such as crab and lobster.

Table 2. Average vessel length (m) and engine power (kW) of the Welsh sea bass fishing fleet, 2008 to 2016.

	2008	2009	2010	2011	2012	2013	2014	2015	2016	Average
Vessel Length (m)	5.6	5.6	5.6	5.7	5.6	5.7	5.8	5.7	5.7	5.7
Power (kW)	50.0	48.6	45.3	47.6	47.0	51.8	50.1	49.8	49.7	48.9

3. Sea bass landings

Table 3. Sea bass landings (tonnes) by the Welsh sea bass fleet, other Welsh vessels (for which sea bass is a secondary target or bycatch species), all Welsh vessels, and the percentage contribution of these landings to UK and EU total landings, 2008 to 2016 (sourced from Seafish, MMO and ICES data, 2017).

Year	Wales – sea bass landings by the core Welsh sea bass fleet (tonnes)	Wales - sea bass landings by other Welsh vessels (tonnes)	Wales – total bass landings by all Welsh vessels (tonnes)	% of UK weight of sea bass landings	% of total EU weight of sea bass landings
2008	57	16	73	9	3
2009	47	11	58	8	1
2010	36	10	46	6	1
2011	45	7	53	7	1
2012	52	13	65	7	2
2013	72	6	78	10	2
2014	82	9	91	9	3
2015	54	7	61	9	3
2016	58	6	64	12	-
Average	56	9	65	9	2

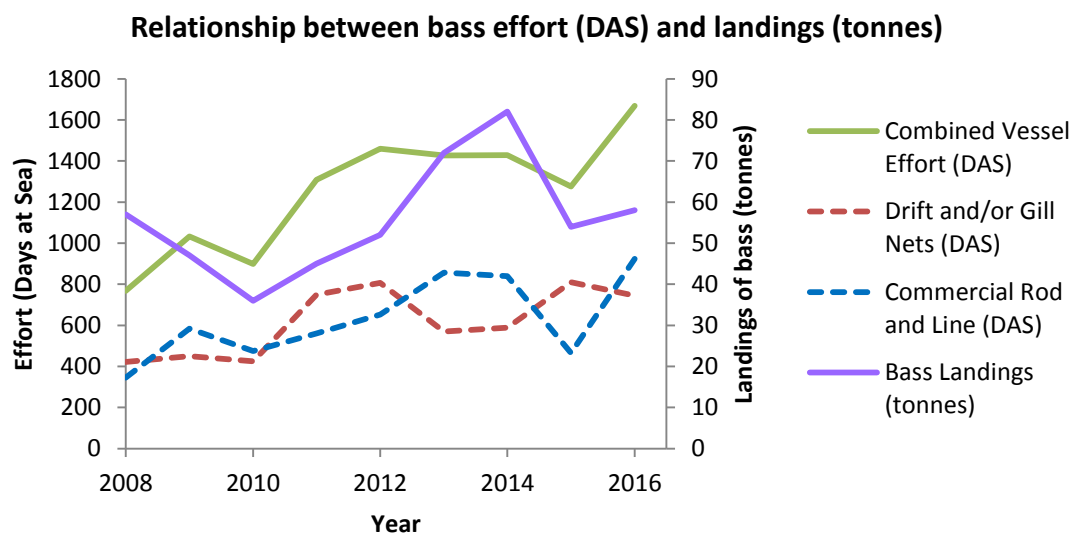


Figure 2. The relationship between effort (days at sea) and bass landings (tonnes) 2008 to 2016 for the Welsh sea bass fleet. ‘Combined vessel effort’ represents commercial rod and line and drift and/or fixed net days at sea, as these are the primary gear types used by the fleet.

Welsh sea bass fleet landings by species

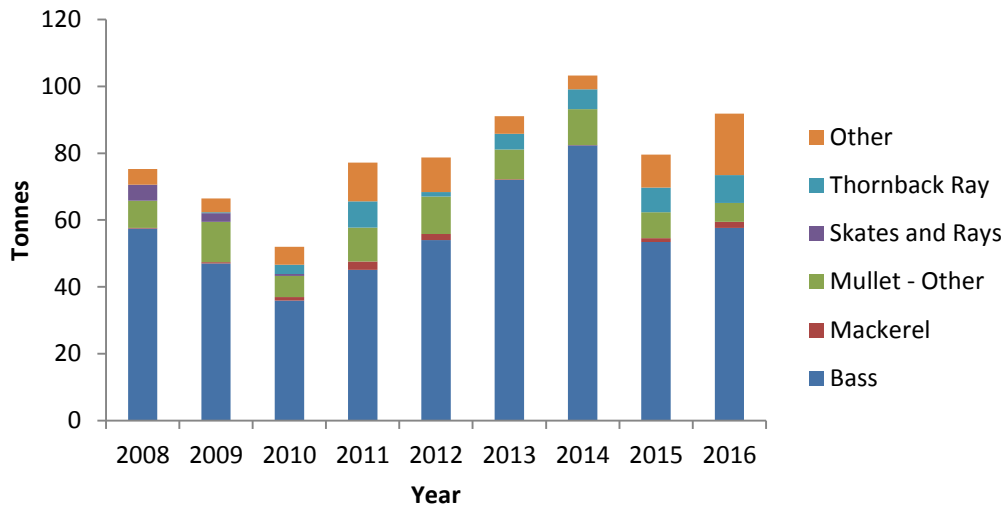


Figure 3. Catch or species composition of total landings (weight) made by the Welsh sea bass fishing fleet, 2008 to 2016.

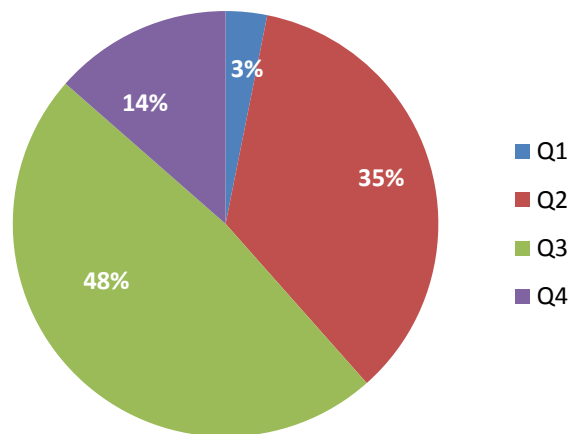


Figure 4. The seasonality of the sea bass fishery in Wales demonstrated by the average percentage of total annual landings per quarter, 2008 to 2016.

Table 4. The value of sea bass landings (£) made by all Welsh vessels, the core Welsh sea bass fleet, other Welsh vessels (for which sea bass is a secondary target or bycatch species), 2008 to 2016.

Value of sea bass landed (£)*			
	All Welsh vessels	Welsh sea bass fleet	Other Welsh vessels
2008	278,256	188,571	89,686
2009	341,745	274,169	67,575
2010	288,908	223,641	65,267
2011	382,518	334,045	48,473
2012	426,369	350,494	75,876
2013	521,142	477,585	43,557
2014	612,521	554,792	57,729
2015	459,083	407,153	51,930
2016	526,436	471,018	55,418

* Nominal value (unadjusted for inflation)

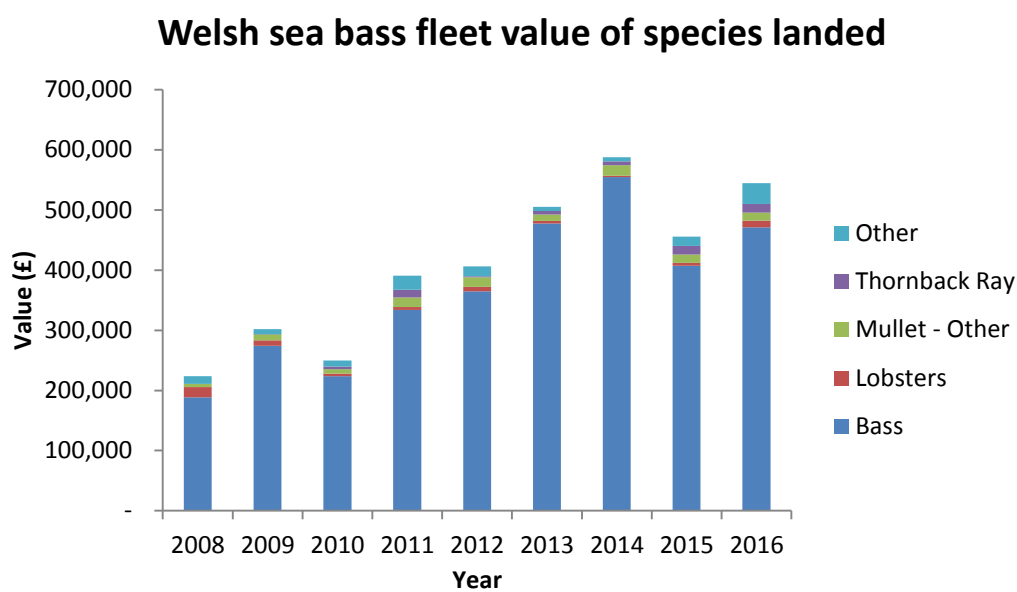


Figure 5. The value of landings, by species, made by the Welsh sea bass fleet, 2008 to 2016.

4. Fleet economic value and performance

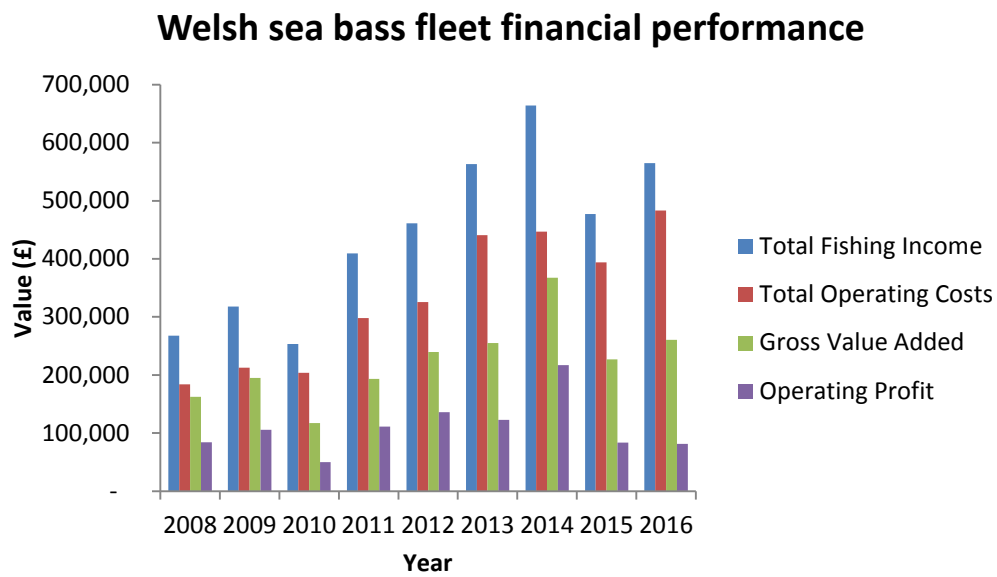


Figure 6. Average per vessel total operational costs, total income, GVA and operating profit for the Welsh sea bass fleet, 2008 to 2016.

5. References

ICES Advice on fishing opportunities, catch, and effort Celtic Seas and Greater North Sea eco regions, Published 30 June (2016) Version 2: 11 July 2016

MMO UK sea fisheries annual statistics report 2016, Published 28 September (2017)