

Fishing Opportunities for 2010

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Following the (delayed) completion of the EU-Norway fisheries negotiations, this note summarises the fishing opportunities that will be available to the Shetland fishing fleet in 2010. Despite a headline increase in cod quota, the Shetland whitefish fleet will experience cuts in other quotas and have fewer days at sea in 2010, and face rising costs and uncertain markets. The pelagic fleet is also facing small cuts in quotas but the impact of these will hopefully be limited.

Introduction

Quotas and other management arrangements for fish stocks in the North Sea are normally agreed annually for the year ahead through a two-stage process: Management arrangements for fish stocks jointly managed with Norway (cod, haddock, whiting, saithe, plaice, mackerel and herring) are agreed through negotiations between the EU and Norway. These arrangements are then ratified, and management arrangements for other fish stocks in European waters agreed, at the 'end-of-year' meeting of the European Fisheries Council in December.

In 2009, the EU-Norway negotiations broke down over the issue of Norwegian access to mackerel stocks in EU waters, as a result of which it was not possible to reach an agreement before the end of the year. These negotiations were resumed in January 2010, and an agreement was eventually concluded on 27th January.

This note summarises the principle outcomes relevant to the Shetland fishing fleet of the EU-Norway agreement and the 'end-of year' European Fisheries Council.

Whitefish Species

In 2008 (the last year for which data are available) landings of whitefish by the Shetland whitefish fleet were worth £18 million, with a further £8 million worth landed in Shetland by non-Shetland vessels. The table below shows the main whitefish species landed by the Shetland fishing fleet and the agreed quota changes for each.

	Proportion of Landings by Shetland Fleet in 2008 (% of landings by value)	Change in Quota from 2009 to 2010 (North Sea)
Monks	30%	0%
Haddock	19%	- 15%
Cod	16%	+ 16%
Whiting	9%	- 15%
Megrims	6%	+ 10%
Saithe	4%	- 15%
Ling	4%	- 15%
Nephrops ('prawns')	3%	- <1%
Other species	10%	----

NOTE: there may be some further minor changes to these figures as a result of quota swaps, etc.

As may be seen, quotas for cod and megrims have been increased but those for the other main species caught by the Shetland whitefish fleet either remain unchanged (monks, nephrops) or have been cut (haddock, whiting, saithe, ling). The cut in whiting quota will actually be slightly less than indicated due to the transfer of 500 tonnes of additional quota (about 4% of the total quota) from Norway to the EU.

Agreement was also reached between the EU and Norway to make some additional cod quota available to fishermen who agree not to discard any cod, and to have their fishing activities (including discarding) monitored by CCTV cameras and other means onboard their vessels. Although this scheme is being championed by the Scottish Government many of the details of how it would operate remain unclear and the scheme has received little support from Scottish (or Shetland) fishermen.

Cod Recovery Plan

Although the quota for cod is being increased by 16%, whitefish vessels remain subject to the Cod Recovery Plan that was implemented in 2009. Under this plan cod mortality (i.e. the proportion of the cod stock that is killed) has to be reduced by a further 10% in 2010, on top of the 25% that was to have been achieved in 2009.

Measures to achieve this reduction in 2010 are still being developed by the Scottish Government, under its 'Conservation Credits' scheme, but are certain to include further reductions in fishing effort - the number of days that vessels are allowed to fish (in addition to the limits imposed in 2009). Unfortunately, there are indications that the UK may have exceeded the target level of fishing effort in 2009. If this is the case then any shortfall may be carried forward to 2010 (i.e. the cut in effort in 2010 may be larger than expected).

The Cod Recovery Plan will require a further 10% cut in cod mortality in 2011, unless the cod stock has by then returned to a 'safe' level.

Assessment of Impact

Superficially, the agreed changes in quotas would - on their own - probably have only a small net impact on the earnings of the Shetland whitefish fleet; the cuts in some species being largely offset by increases in cod and megrims.

However, the following factors also need to be taken into account:

- ◆ increased landings of cod may cause a drop in market prices (as happened in 2009), reducing fishermen's income from this species.
- ◆ under the Cod Recovery Plan fishermen face a further cut of at least 10% in the amount of time they can spend fishing in 2010. This will further limit some fishermen's ability to catch their full quota entitlements (due to lack of time).
- ◆ tighter restrictions on the trade in days at sea are likely to limit their availability in 2010, resulting in higher costs. The costs of leasing additional quota are also rising. (Some boats have had to purchase or lease additional days and/or quota to boost their incomes.)
- ◆ fuel and other costs are also likely to rise.

Pelagic Species

In 2008 (the last year for which data are available) landings of pelagic fish by the Shetland whitefish fleet were worth £32 million, with a further £34 million worth landed in Shetland by non-Shetland vessels. The table below shows the main pelagic species landed by the Shetland fishing fleet and the agreed quota changes for each.

	Proportion of Landings by Shetland Fleet in 2008 (% of landings by value)	Change in UK Quota from 2009 to 2010 (North Sea)
Mackerel	87%	- 5%
Herring	10%	- 4%
Other species	3%	----

As may be seen, there have been small cuts in the quotas of both mackerel and herring in 2010.

The EU-Norway agreement allows access for EU vessels to catch their quota share within Norwegian waters (and *vice versa*). Start dates for the mackerel fishery have also been harmonised between the EU and Norway.

These, and other measures, form part of a new 10-year management plan that should provide for greater stability in the future management of the shared mackerel stock. Amongst other things, it will avoid the need to reach annual agreements on issues such as quotas and access.

Assessment of Impact

The pelagic fleet is facing small cuts in quotas of the main species it catches, but the impact of these will hopefully be limited.

Other Measures Agreed

In addition to the measures already mentioned, the EU and Norway have agreed to pursue the development of long-term management plans for all other jointly managed fish stocks (cod, haddock, whiting, saithe, plaice and herring). As with mackerel the intention of these plans is that they will remove the need to negotiate quotas, etc., each year (the plans will specify how quotas will change in response to changes in the stock).

Further Information

If you have any queries, or require any further information, please contact me at the NAFC Marine Centre.

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