SWFPA

The largest Association in the UK and Europe representing fishermen’s interests.

- Proven track record in responding to major stock issues
- Work with institutions and governments
- Liaise closely with environmental NGOs
- Keen focus on sustainable harvesting and building on market share
- Work hard to ensure industry standards and crew welfare

Representing 200 vessels and 14OO fishers with a combined revenue approaching £250M

Scottish White Fish Producer's Association

Mike Park
CEO

Central hub for SWFPA and also houses Scottish Seafood Centre of Excellence

David Milne
Chairman

Recent honours include the Global Conservation Prize, which WWF awarded to our CEO, Mike Park, for his work in encouraging sustainable fishing practices in Scotland and beyond.

Also won Best Project at The Ocean Awards 2016 for our work on rebuilding North Sea cod stocks, and we were a winner on the Scottish Green List in 2010 for our commitment to sustainability.

SCOTTISH FISHERMEN'S FEDERATION

Scottish Fishermen's Federation

- Formed in 1973
- Federation comprises 8 constituent associations covering the smallest under-10m creel boat to the largest most modern pelagic vessel
- Membership of around 400 vessels *(or businesses)*
- The Scottish Fishermen's Federation constituent associations account for circa 90% of the total Scottish quota
- Over 65% of the UK total
- SFF Executive Committee and Working Groups underpin Policy and workstreams
- Represent and lobby for the fishing industry at national and international level

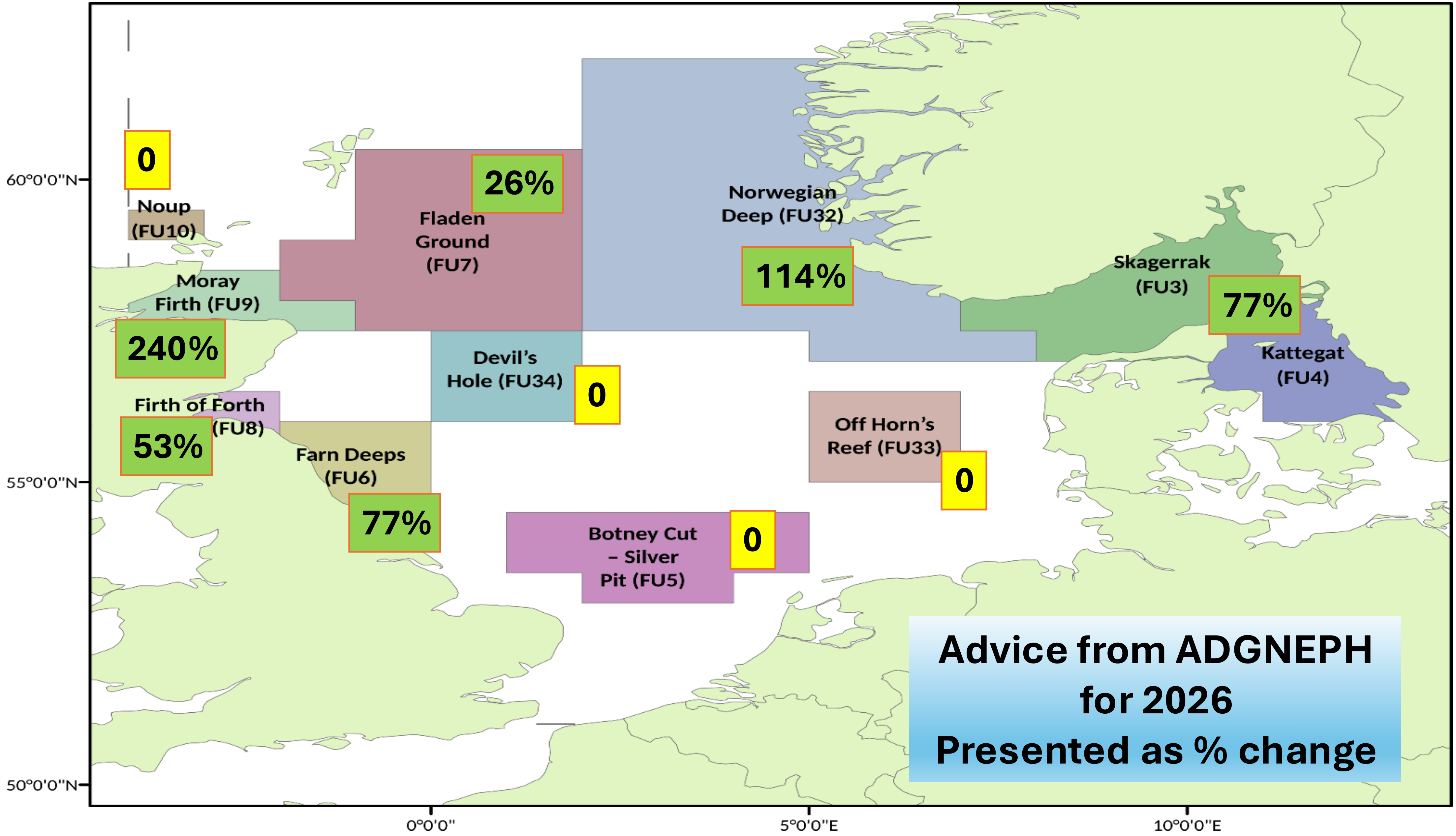
Demersal Fisheries - Current stock status and ICES catch advice

Species	Stock	Advice chamge
Cod	Northern	Zero
Haddock	N Sea, W Scot, Skagerrak	-3.7
Haddock	Rockall	-35
Plaice	N Sea and Skagerrak	-7.2
Saithe	Northern	-24
Whiting	N Sea, East England Channel	+5.6
Megrim	N Sea and West of Scotland	+6.6
Anglerfish	Northern	+4.8
Ling	NE Atlantic	-30
Hake	Northern	+4.7

Pelagic Fisheries -Current stock status and ICES catch advice

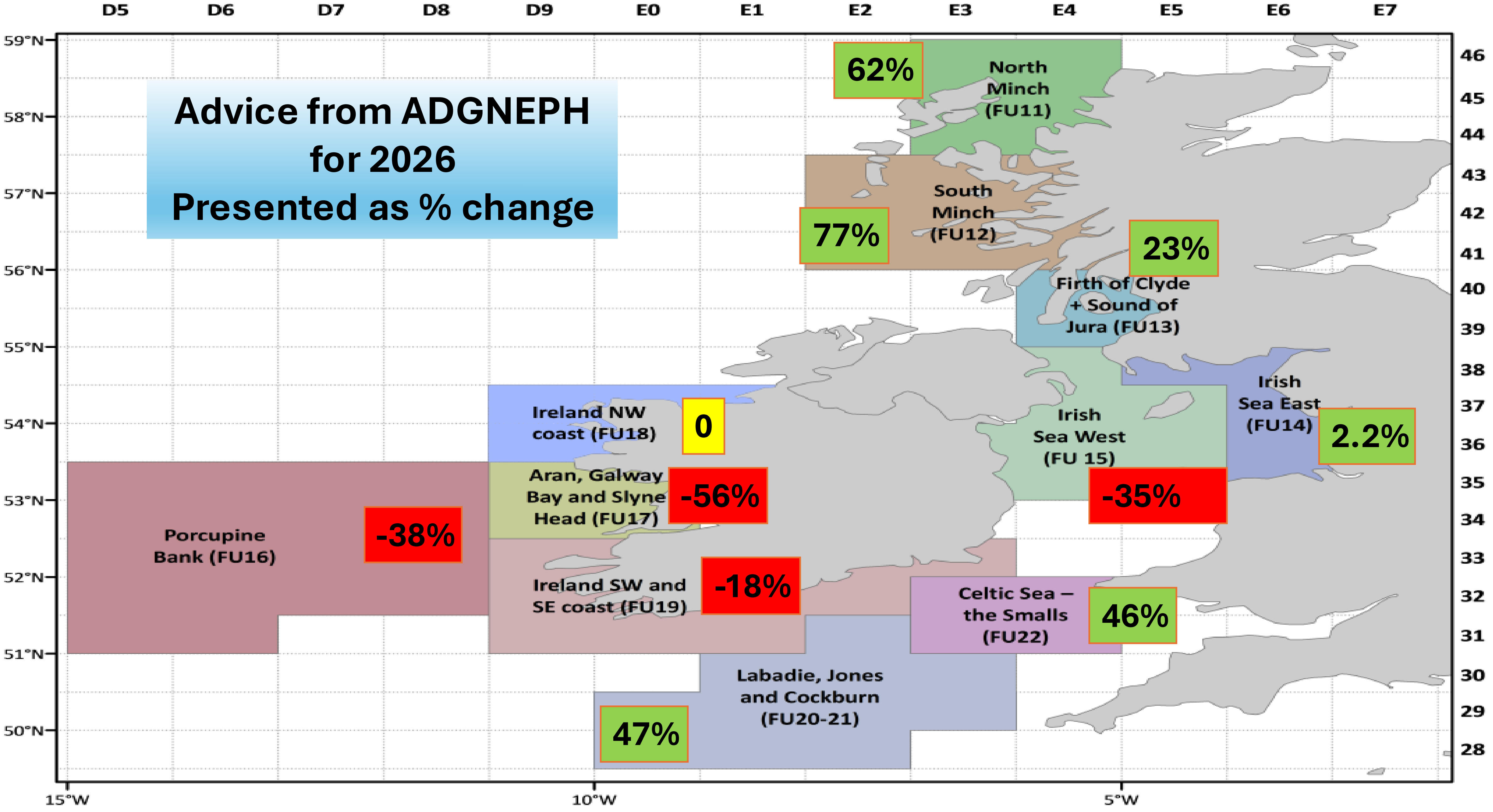
- Marine Stewardship Council calling on governments of North-East Atlantic to establish quota share arrangements in line with scientific advice for important stocks.
- Upcoming annual negotiations will be an opportunity to secure emergency management measures, ensuring a plan for stock recovery.

Species	Stock	Advice chamge
Mackerel	Atlantic	77% reduction
Herring	Atlanto-Scandian	23% increase
Blue Whiting	North East Atlantic	41% reduction
Herrring	North Sea	30% reduction



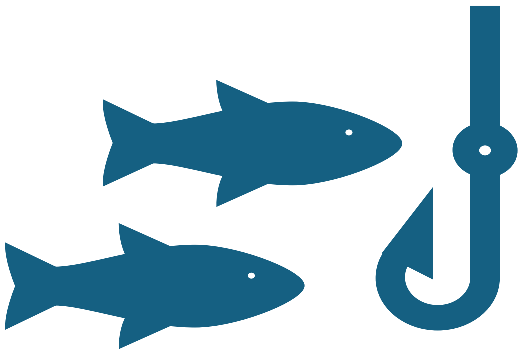
Preliminary Nephrop Advice for 2026 (ADGNEPH). North Sea TAC Area = 40%

Preliminary Nephrop Advice for 2026 (ADGNEPH)



West of Scotland TAC Area +54% **Celtic Sea TAC Area -19%**

Included stocks (38)
anf.27.3a46
aru.27.123a4
aru.27.5b6a
bli.27.5b6712
bll.27.3a47de
boc.27.6-8
cod.27.46a7d20.NW
cod.27.46a7d20.SO
cod.27.46a7d20.VK
dgs.27.nea
ghl.27.561214
had.27.46a20
had.27.6b
her.27.1-24a514a
her.27.3a47d
hke.27.3a46-8abd
hom.27.2a3a4a5b6a7a-ce-k8
hom.27.4bc7d
lez.27.4a6a
lez.27.6b
mac.27.nea
nep.fu.11
nep.fu.12
nep.fu.13
nep.fu.6
nep.fu.7
nep.fu.8
nep.fu.9
ple.27.420
pok.27.3a46
pol.27.67
reg.27.561214
sol.27.4
tur.27.4
whb.27.1-91214
whg.27.47d
whg.27.6a
wit.27.3a47d
52 48 52 48 45 43 46 47 46 46 41 43 39 41 42 40 41 42 41 43 47 50 47 46 45 55 52 56 57 55 62 60 63 62 60 62 60 63 66 70 73
Full mean
F mean
SSB mean
Combined SFI (%)
0
20
40
60
80
100
1990
2000
2010
2020
Year



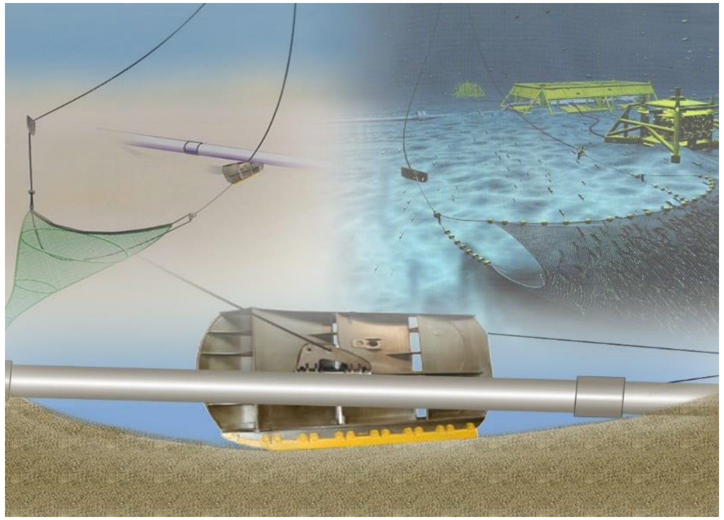
Seafood Accreditation

The Scottish fishing industry has several accreditations, most prominently the **Marine Stewardship Council (MSC)** certification for various wild-capture fisheries, managed through groups like the Scottish Fisheries Sustainable Accreditation Group (SFSAG) and the Scottish Pelagic Sustainability Group (SPSG).

- **Scottish Fishing Industry Relationship with eNGO's**
- Complex relationship with environmental organizations, characterized by both deep-seated conflicts and increasing, though often cautious, collaboration. Disagreements often arise over the environmental impact of fishing practices and the designation of Marine Protected Areas (MPAs), while collaboration occurs on issues like scientific monitoring, marine litter, and sustainability certification.

We are not alone… coexistence is not always easy
(in multiple use context)

Beatrice Windfarm Demonstrator Project adjacent to Beatrice oil platforms



Aquaculture

- Spatial overlap – loss of Nephrops fishing grounds
- Inshore waters but plans to expand into deeper waters

Oil and gas

- Spatial overlap – loss of offshore fishing tows
- Decommissioning – looking less likely of return of fishing opportunities

Nature Conservation

- Resulting in restriction to activity based on risk to features

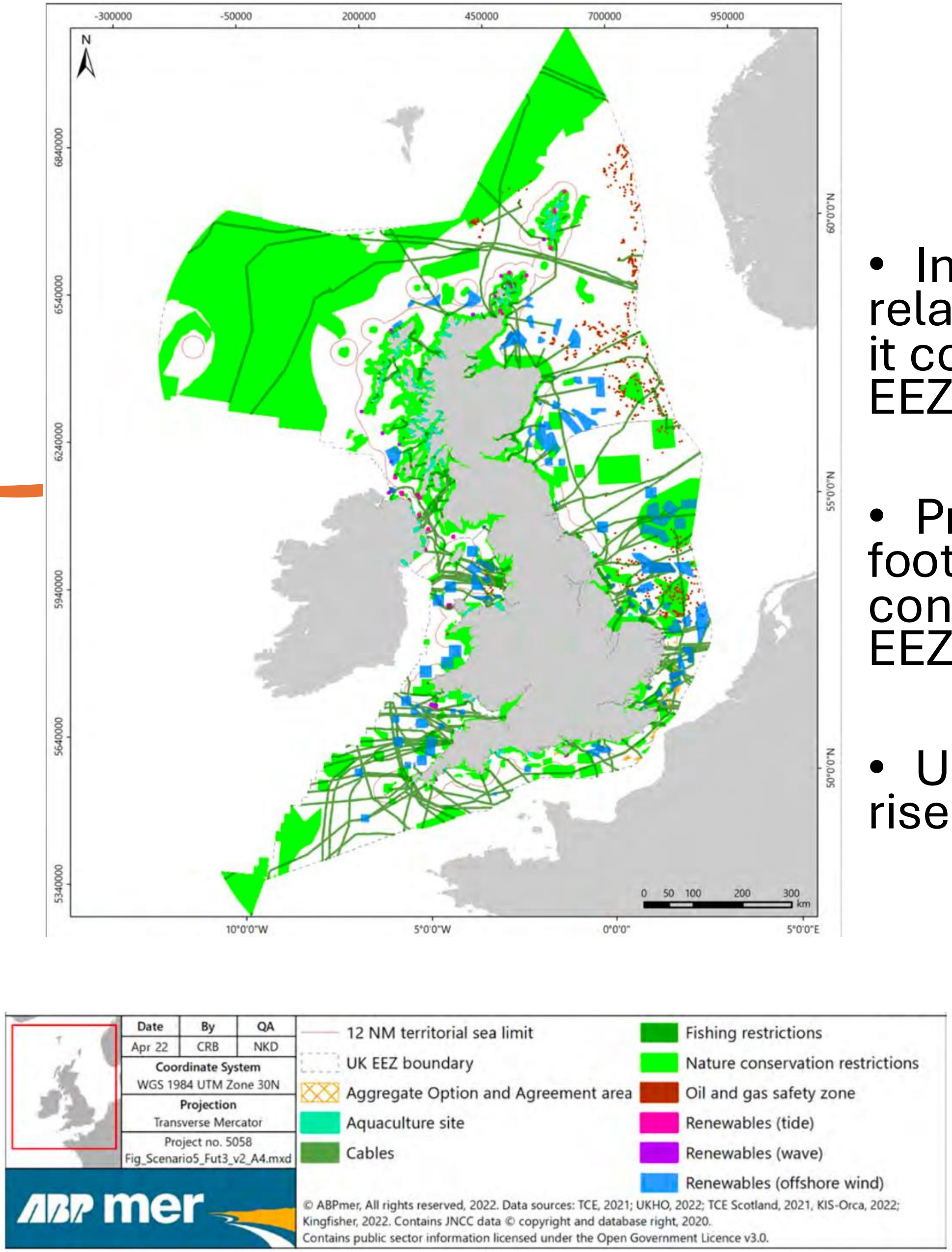
Renewables

- Spatial overlap – loss of inshore fishing opportunities
- Low engagement with fishing industry in the planning process
- Impact on benthic and demersal species not fully assessed

Spatial Squeeze in Fisheries

Final Report

June 2022



Note: Does not include spatial representation of HPMAs in Scotland, or new aquaculture sites

Figure ES2. Future 3 scenario, all sectors

- In the past, fishing was relatively unconstrained in where it could operate across the UK EEZ
- Presently, overall spatial footprint of activities and policies constraining trawling is 23% of UK EEZ.
- Under worst-case scenario this rises to 49% of UK EEZ by 2050.

1999 precautionary principle invoked by European Commission to rebuild stocks

- Cod closures in 2001 leading to strikes and two rounds of decommissioning (2001 & 2003 – Removing 175 vessels over two rounds)

Independent Onboard Observer Scheme

- Initially developed during the Cod Recovery Plan and Conservation Credit Scheme:
  - To provide evidence of practical solutions to reduce cod catches
  - Reward fishers for adopting further conservation measures
  - Selective Gear Trials
  - Data collection from North Sea and West of Scotland whitefish and *Nephrops* fisheries.
  - Now provides around 90% of commercial catch data used in stock assessment by ICES.

- Coalition of experts driving strategic innovation for a prosperous and sustainable UK Seafood industry.

- Since 2014, FIS has leveraged more than £3million in investment into innovation for sustainable UK Seafood.

- **Smart Trawl**

- In-water sorting device (with 3 components) to determine species and size of animals; and a computer-controlled gate to retain valuable fish and release unwanted catch.

- **Vessels of the future**

- Investigating opportunities for alternatively powered fishing vessels in the UK, with the objective of ensuring no sector of the fleet is left out of a truly just transition to low-carbon fishing.

- **Prawn Stunning and Tailing Machine**

- Develop an onboard *nephrops* stunning and tailing machine; the ability to stun and tail *nephrops* at sea will bring significant improvements to the fishery, including to the welfare of *nephrops* landed.

Brexit and Demersal Fisheries

Unmet Expectations Post-Brexit

Many in the UK demersal fisheries sector felt Brexit promises of regained control over fishing rights were not delivered.

Extended EU Access

The EU secured 12 more years of guaranteed access to UK waters, frustrating those wanting rapid industry changes.

Ongoing Industry Uncertainty

Negotiations left many feeling the industry's interests were compromised, resulting in ongoing uncertainty for demersal fishers.

Fishing fleet around the UK

The English fleet is larger in size and spends more days at sea on average but the Scottish fleet has double the catching capacity (vessel tonnage), lands more fish, and generates more fishing income.

- England – **1,833 vessels**
- Scotland – **1,575 vessels**
- Wales – **223 vessels**
- Northern Ireland – **193 vessels**

UK vessels landed 24% of their value abroad

UK vessels and operations in the UK and abroad

Value of landings into the UK

Landings in the UK by species group (value): £786m (-5%)

Top 5 species

1. Mackerel £132m (+16%)
2. Nephrops £111m (-8%)
3. King Scallops £60m (-5%)
4. Cod £45m (-7%)
5. Monks or Anglers £45m (-12%)

Volume of landings into the UK

Landings in the UK[2] by species group (volume): 424,807 tonnes (+8%)

Demersal 28%	Pelagic 45%	Shellfish 27%

Top 5 species

1. Mackerel 106,533 tonnes (+20%)
2. Herring 46,833 tonnes (-4%)
3. Haddock 38,397 tonnes (+17%)
4. Nephrops 27,402 tonnes (-4%)
5. Blue Whiting 26,877 tonnes (+56%)

Our processing sector

No. of processing sites in the UK: 353 (+0.6%)

Full-time equivalent jobs: 17,246 (-4%)

Exports from the UK

In terms of volume, the UK exported nearly 12,000 tonnes less seafood than it did in 2022.
However, the value of our exports increased by £8 million.

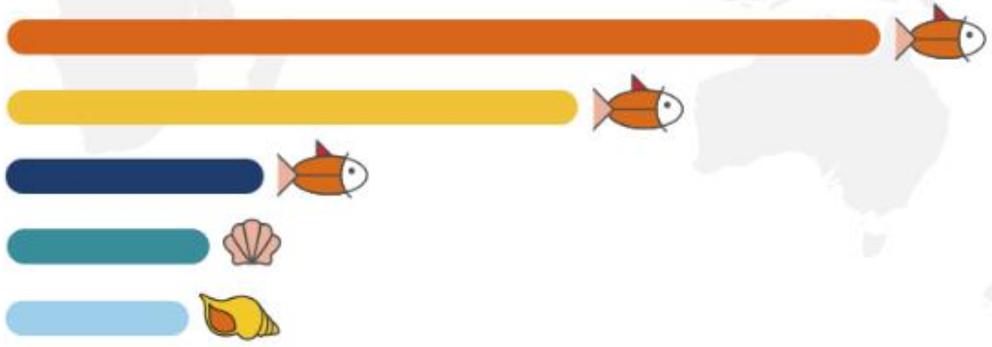
The EU remains the UK's largest export market taking a 70% share of total UK export value.

Top 5 species (value)

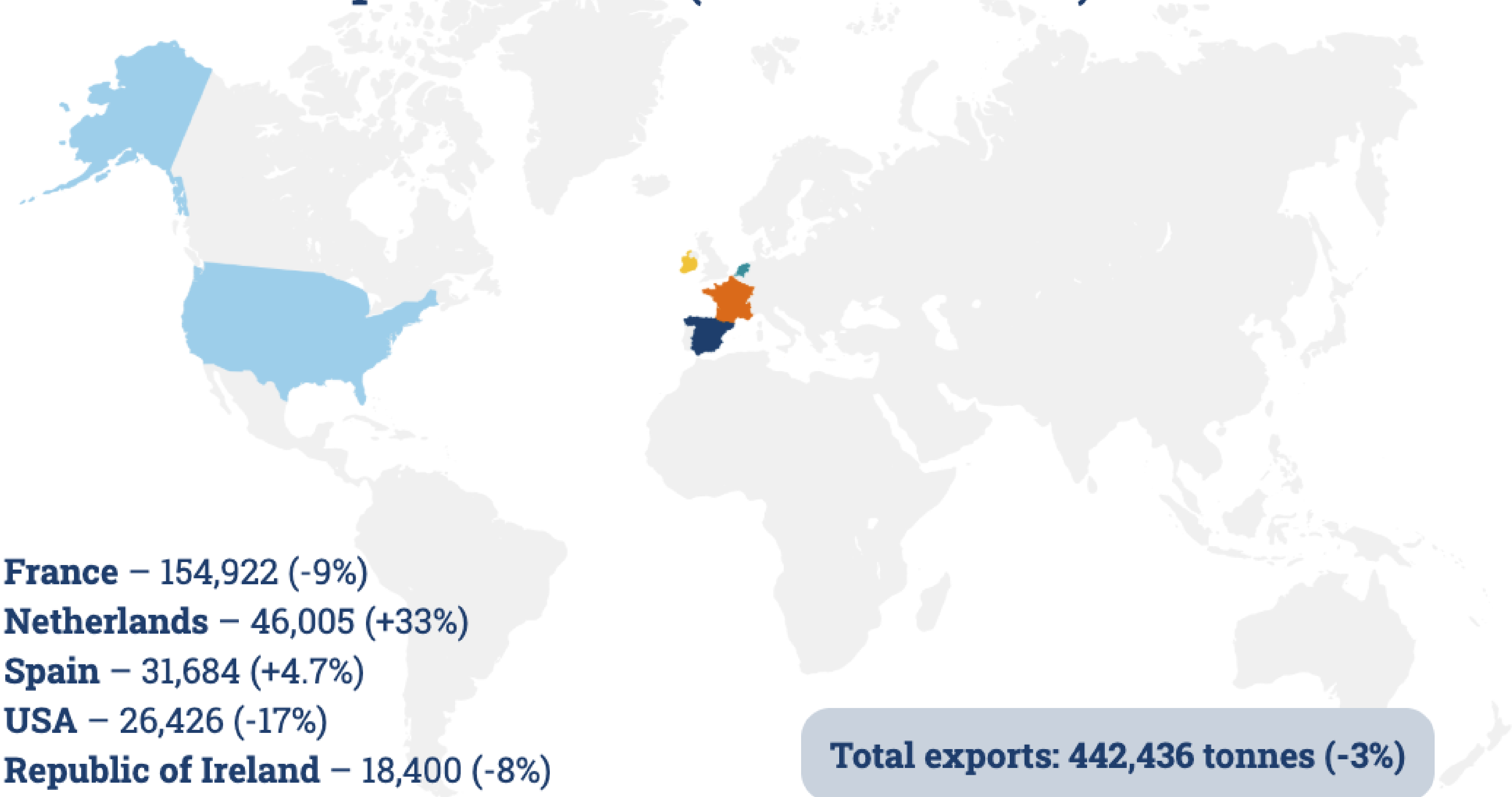
1. Salmon – £667m (-5%)
2. Mackerel – £120m (+20%)
3. Nephrops – £115m (-8%)
4. Trout – £95m (+26%)
5. Scallops – £91m (+1%)

Top 5 species (volume-tonnes)

1. Salmon – 90,752 (-18%)
2. Mackerel – 76,323 (+29%)
3. Herring – 33,125 (+5%)
4. Scallops – 24,686 (-7%)
5. Whelks – 22,516 (+13%)



Top 5 countries (volume-tonnes):

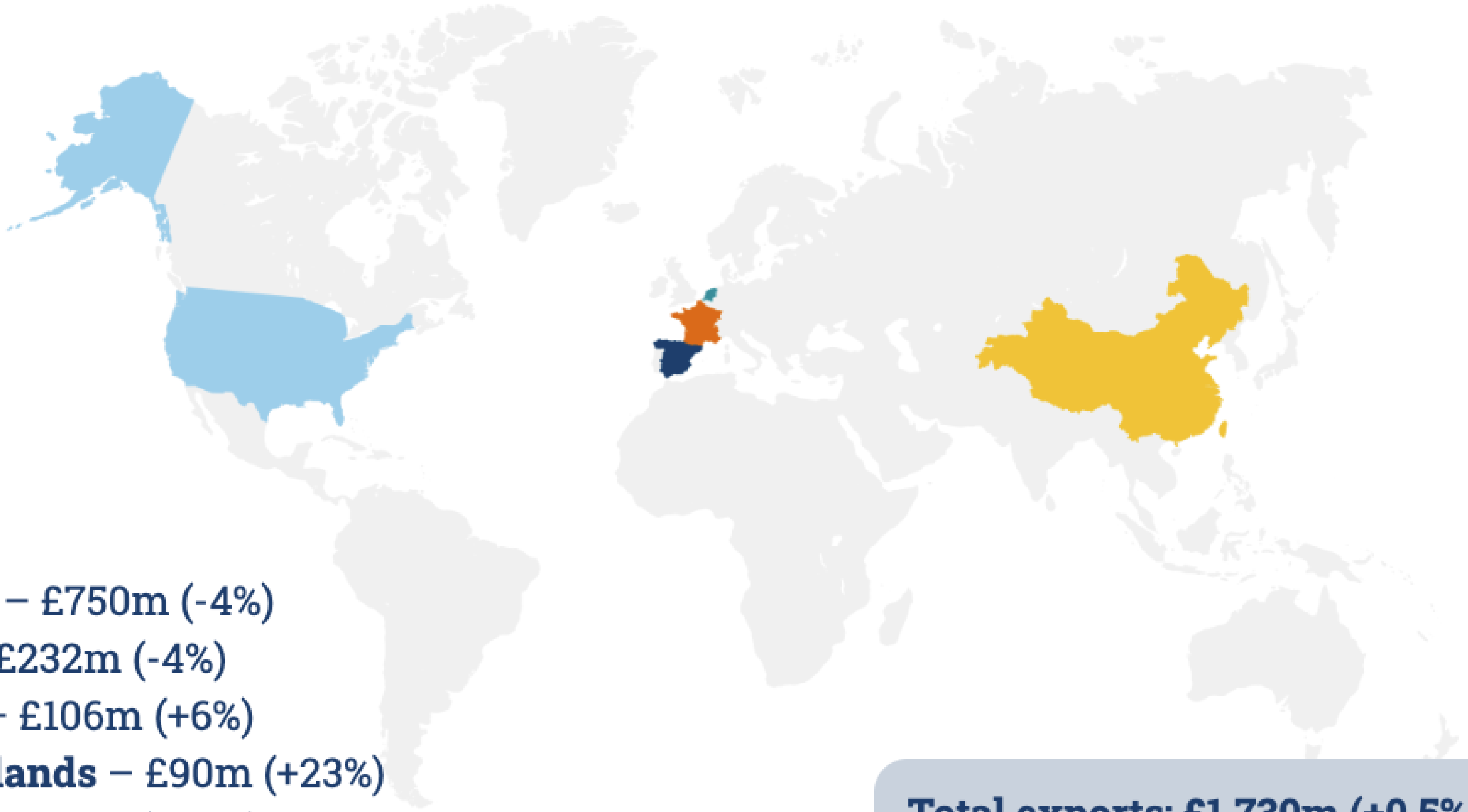


- **France** – 154,922 (-9%)
- **Netherlands** – 46,005 (+33%)
- **Spain** – 31,684 (+4.7%)
- **USA** – 26,426 (-17%)
- **Republic of Ireland** – 18,400 (-8%)

Total exports: 442,436 tonnes (-3%)

Did you know? The UK exported seafood products to 117 countries in 2023

Top 5 countries (value):

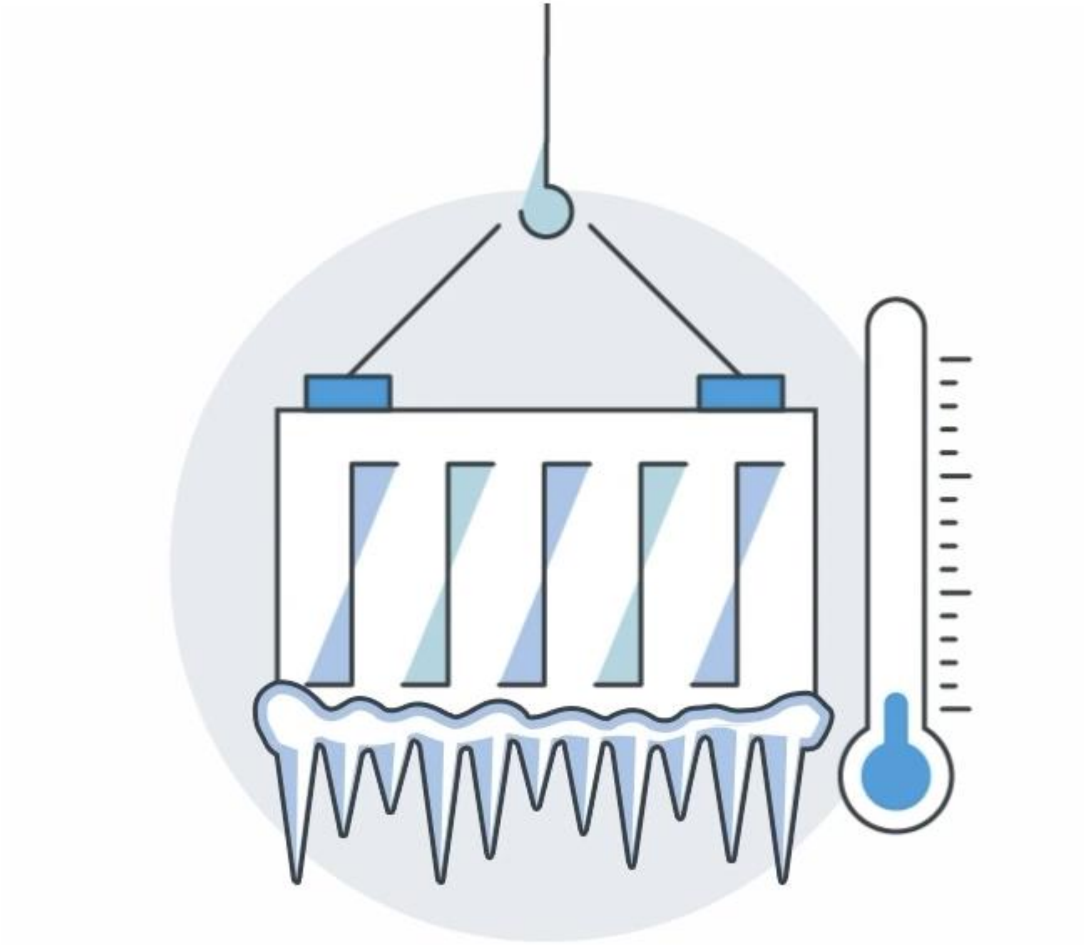


- **France** – £750m (-4%)
- **USA** – £232m (-4%)
- **Spain** – £106m (+6%)
- **Netherlands** – £90m (+23%)
- **China** – £85m (+24%)

Total exports: £1,730m (+0.5%)

Imports into the UK

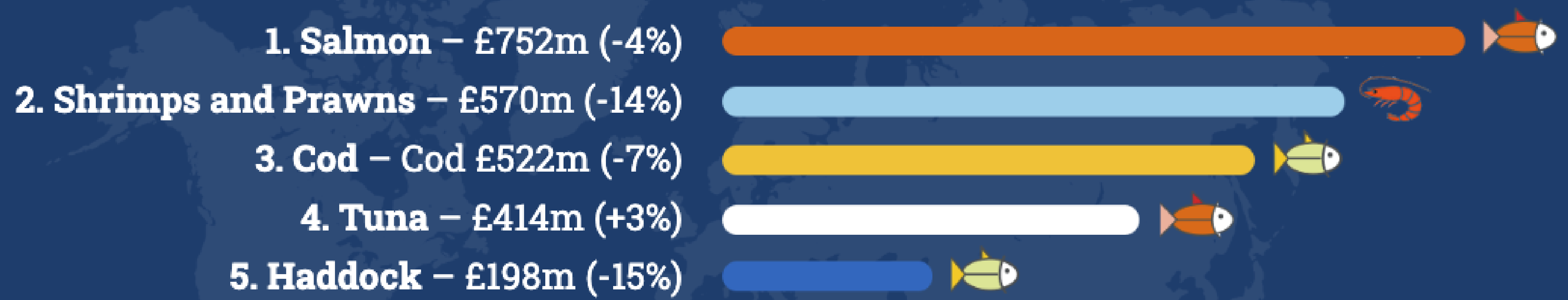
Seafood import prices remained broadly static in 2023, despite higher transport costs. Prices had already hit record highs in 2022 and continued global factors such as rising energy prices, increased regulations and disruptions to maritime traffic in the Red Sea have affected imports.



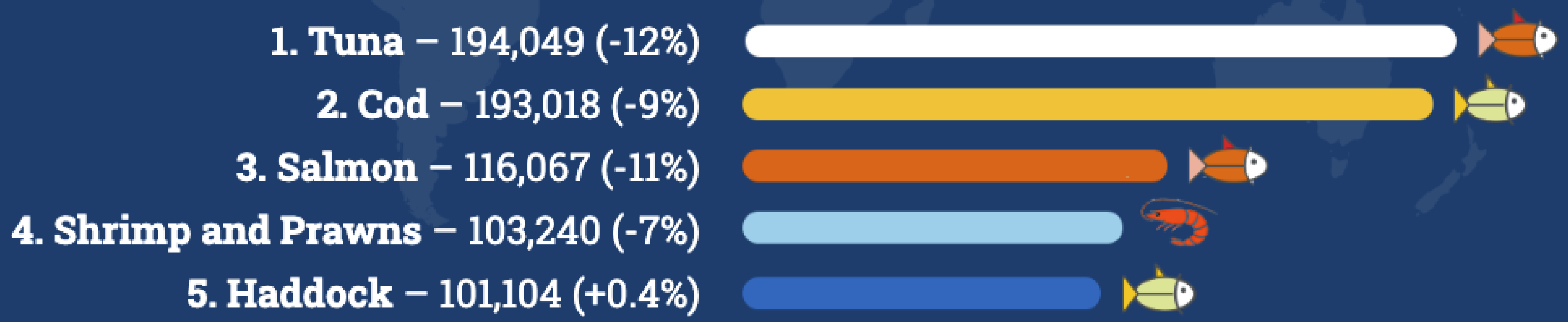
Did you know?

Most of our imported seafood arrives in ‘reefer’ containers capable of temperatures as low as -60°C, to ensure quality is preserved.

Top 5 species (value)



Top 5 species (volume-live weight tonnes)

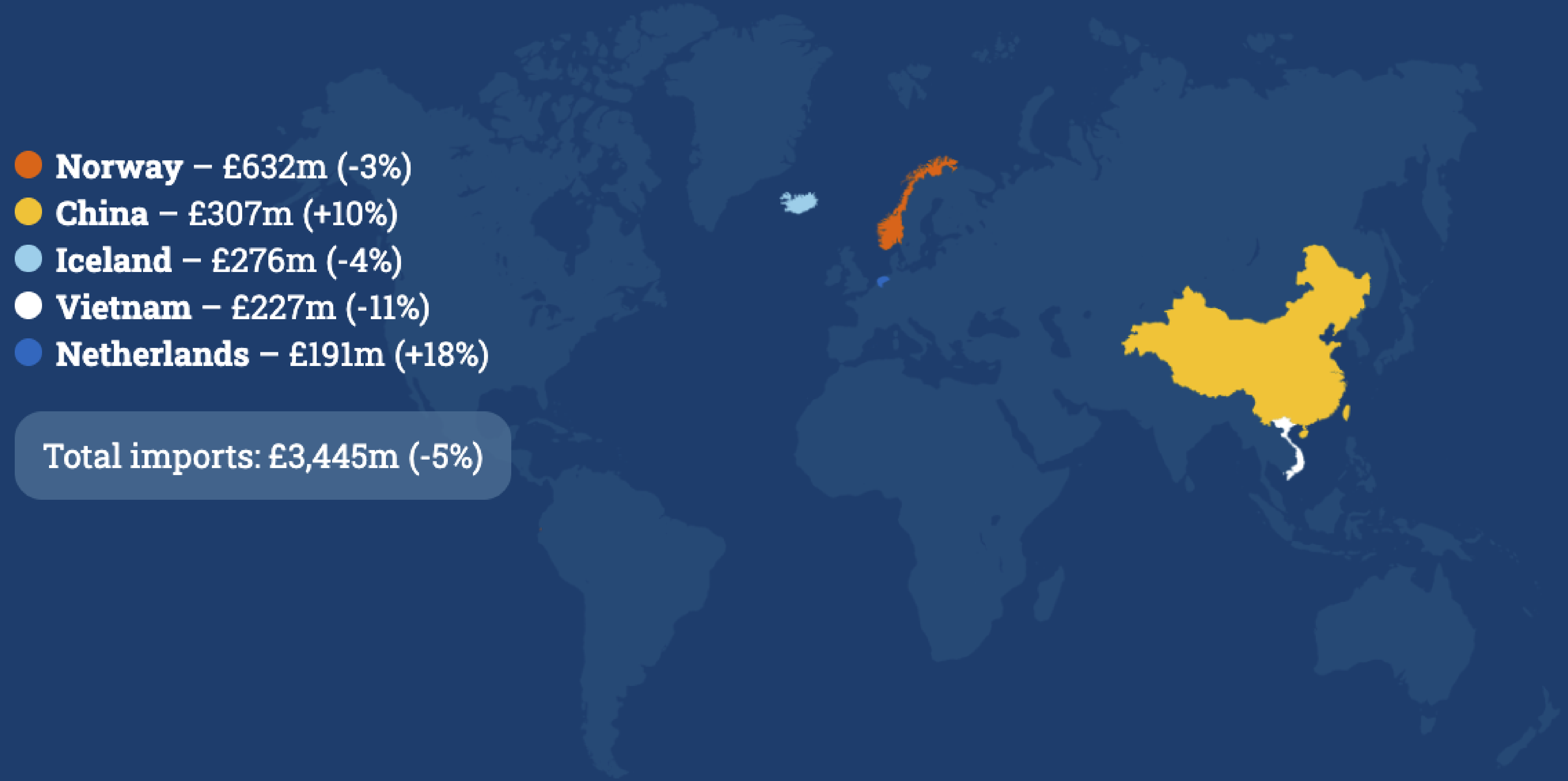


Top 5 countries (volume-live weight tonnes)

- **China** – 171,311 (+12%)
- **Norway** – 137,279 (-9%)
- **Iceland** – 93,239 (+3%)
- **Netherlands** – 85,461 (+22%)
- **Vietnam** – 71,266 (+5%)

Total imports: 1,119,520 tonnes (-6%)

Top 5 countries (value)



The Scottish White Fish Producer's Association

Thank you !

Kenny Coull

Science Policy Officers