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Napier, Ian

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Citation for published version (APA):
Napier, I. (2014). *Fish Landings in Shetland and by the Shetland Fleet in 2013*. NAFC Marine Centre.

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NAFC Marine Centre
University of the
Highlands and Islands

Port Arthur, Scalloway, Shetland ZE1 0UN, Scotland. Tel: 01595 772000 Email: nainfo@uhi.ac.uk WWW: www.nafc.ac.uk

Fish Landings in Shetland and by the Shetland Fleet in 2013

Ian R. Napier

(ian.napier@uhi.ac.uk)

November 2014



Introduction

This review summarises the results of an analyses of official Scottish Government data* for the weight† and value of fish landed in Shetland, and of fish landed by Shetland fishing vessels, in 2013 (the last year for which these data are available).

These data provide a more comprehensive picture of ‘Shetland landings’ than the published *Scottish Fisheries Statistics* (summarised in a previous *NAFC Information Note*), including landings in Shetland by non-Shetland vessels and landings by Shetland vessels (both in and outside Shetland).

Further Information

For further information, or any queries, please contact:

Ian R. Napier, Tel. 01595 772308, Email: ian.napier@uhi.ac.uk

Copies of this and previous NAFC reports and Policy Notes are available on the NAFC Marine Centre website at : <http://www.nafc.ac.uk>

* These data were supplied by the Marine Analytical Unit of Marine Scotland Science, part of the Scottish Government’s Marine Scotland department.

† All weights are ‘Live Weight Equivalent’, i.e. the estimated weight of the fish in their live (ungutted) state.

Overall

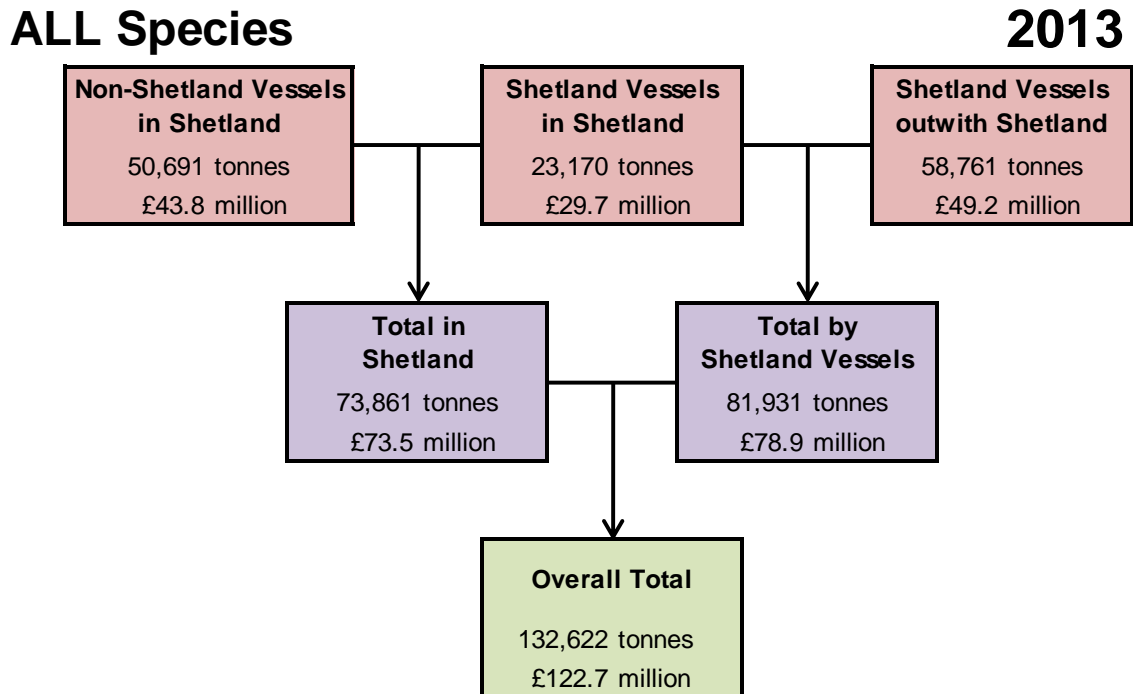


Figure 1 Summary breakdown of the weight and value of all fish landed in Shetland and by Shetland vessels in 2013.

The data from the Scottish Government show that a total of just under 74,000 tonnes of fish, worth some £74 million, were landed in Shetland in 2013 (Figure 1). Of these landings, Shetland fishing vessels accounted for just over 23,000 tonnes (31% of the total) worth £30 million (40%).

An additional 59,000 tonnes of fish - most of it pelagic - worth £49 million were landed outside Shetland by local vessels. This brings the notional total of 'Shetland' fish landings to almost 133,000 tonnes and £123 million (landings in Shetland plus landings elsewhere by Shetland vessels).

The total weight of fish landed in Shetland in 2013 was 9% greater than in 2012 (Figure 2), while their value was 23% greater. There were increases in the landings of both demersal and pelagic fish (see below for more details).

The total weight of fish landed by Shetland fishing vessels in 2013 (everywhere) was 4% greater than in 2012 (Figure 3), while their value was 3% greater.

Overall the total weight of 'Shetland' fish landings in 2013 was 5% greater than in 2012, while their value was 9% greater.

Fishing Landings in Shetland and by the Shetland Fleet – 2013

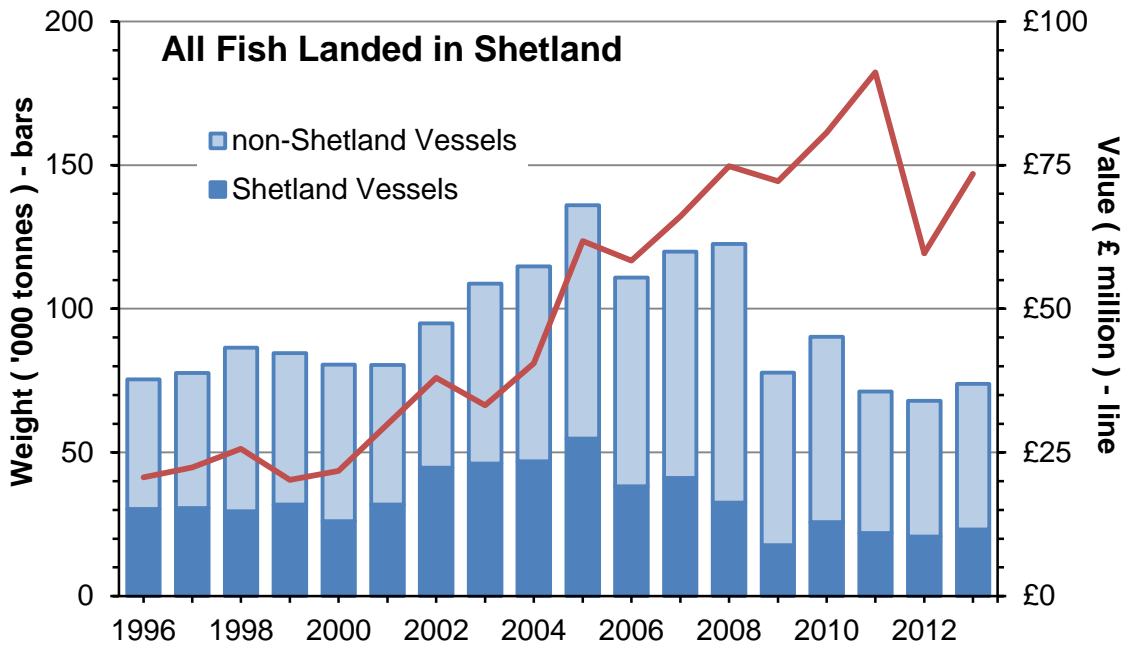


Figure 2 The weight (bars) and value (line) of all fish landed in Shetland from 1996 to 2013.

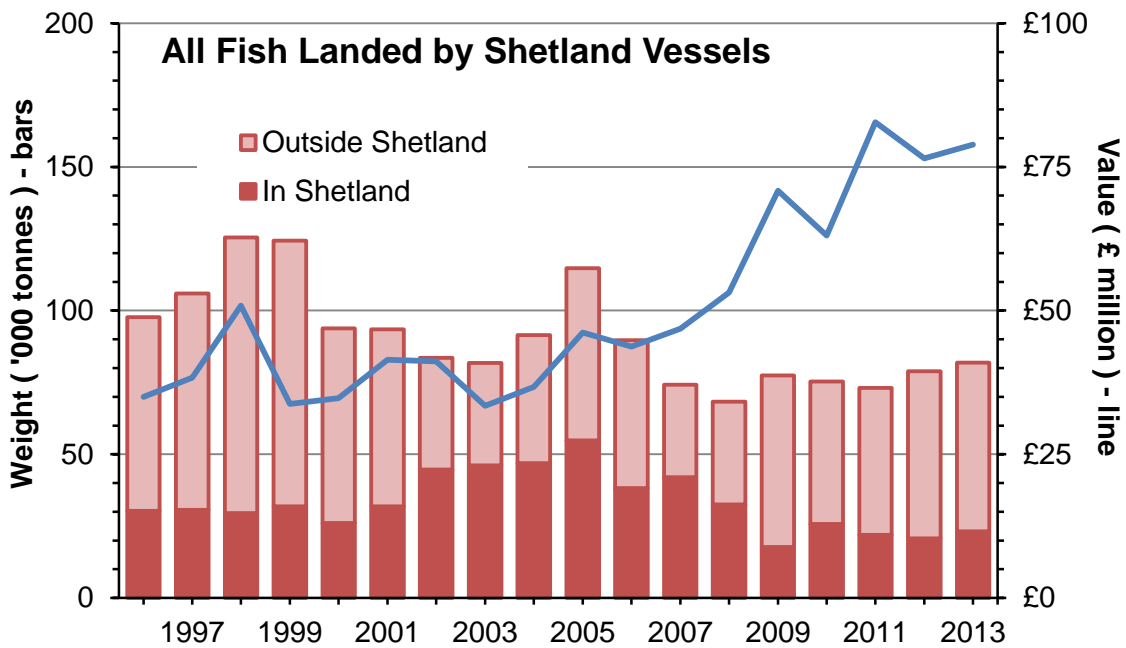


Figure 3 The weight (bars) and value (line) of all fish landed by Shetland fishing vessels from 1996 to 2013.

Fishing Landings in Shetland and by the Shetland Fleet – **2013**

Pelagic species (mackerel, herring, etc.) accounted for most of the fish landed in Shetland (75% by weight, 60% by value), but had the smallest unit-value (Table 1). Whitefish (cod, haddock, monks, etc.) accounted for 23% of the weight of landings but 35% of their value. Shellfish (crabs, scallops, etc.) accounted for the smallest proportion of landings (3% by weight, 5% by value) but had the highest unit-value.

Table 1 The total weights and values of fish landed in Shetland in 2013 by species group.

	Weight		Value		Unit Value
	tonnes	%	£ m	%	£ / kg
Pelagic Fish	55,229	75%	£44.4	60%	£0.80
Whitefish	16,727	23%	£25.6	35%	£1.53
Shellfish	1,905	3%	£3.5	5%	£1.84
Total	73,861		£73.5		£1.00

Place of Landing

Table 2 shows the landings in Shetland in 2013 broken down by place of landing. Landings outside of Lerwick, Scalloway and Cullivoe were predominantly of shellfish.

Table 2 The total weights and values of fish landed in Shetland in 2013 by place of landing.

	Weight (tonnes)	Value (£ 000s)
Baltasound	14	£38
Cullivoe	1,728	£2,686
Mid Yell	136	£287
Burravoe	22	£33
Yell and Fetlar	53	£100
North Isles Total	1,953	£3,143
Collafirth	54	£119
Eshaness	51	£65
Northmavine	1	£2
Northmavine Total	106	£185
Sullom / Toft	167	£246
Vidlin	65	£106
Voe	23	£29
Other Central Mainland	63	£84
Central Mainland Total	318	£465
Whalsay	223	£465
Skerries	73	£128
Whalsay / Skerries Total	295	£594
Aith	11	£21
Skeld	223	£420
West Burrafirth	107	£142
Other West Mainland	13	£23
West Mainland Total	354	£607
Burra (Hamnavoe)	1	£4
Sandwick	2	£4
Dunrossness and Fair Isle	8	£11
South Mainland Total	11	£19
Lerwick	66,942	£63,009
Scalloway	3,881	£5,484
OVERALL TOTAL	73,861	£73,506

National Context

In a national context, more than one quarter (28%) of all the finfish* landed in Scotland in 2013 and just under one quarter (23%) of all the finfish landed in the UK were landed in Shetland (by weight). With the exception of a dip in 2012 these percentages have remained relatively constant over the last four years (Figure 4).

More fish and shellfish was landed in Shetland in 2013 than in any other port in the UK, except Peterhead.

More finfish* was landed in Shetland in 2013 than in all of England, Wales and Northern Ireland (Figure 5).

Shetland fishing vessels accounted for one quarter (26%) of all the finfish* landed by Scottish fishing vessels in 2013, and 17% of all landings by UK vessels.

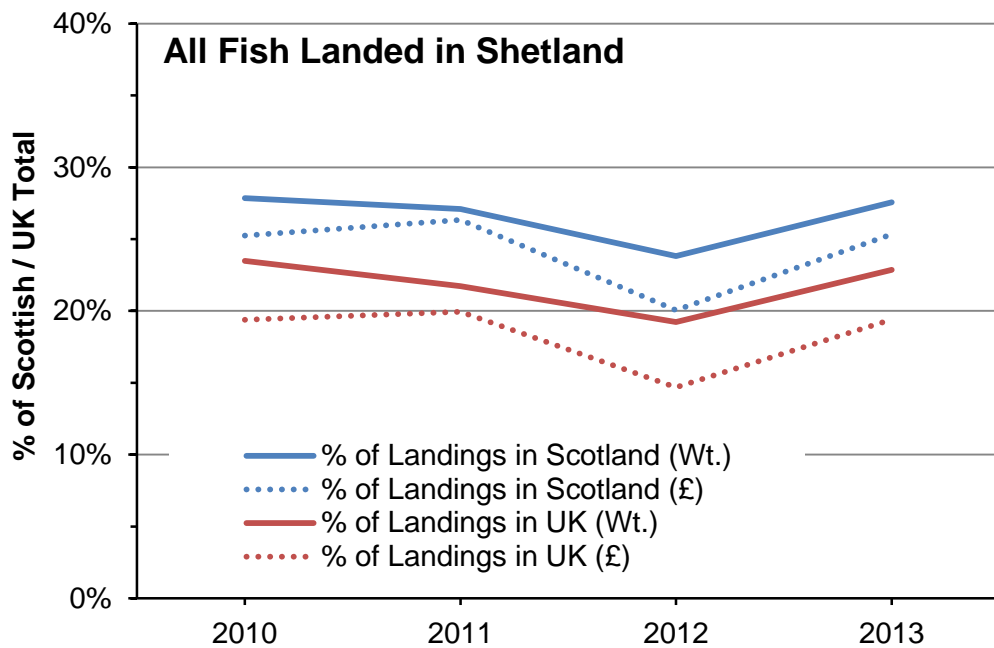


Figure 4 The weight of finfish landed in Shetland as a percentage of the totals landed in Scotland and the UK from 2010 to 2013. (Excluding shellfish.)

* Excluding shellfish.

Fishing Landings in Shetland and by the Shetland Fleet – **2013**

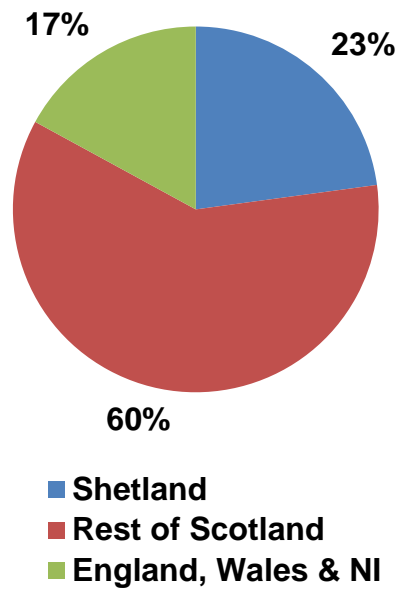


Figure 5 Breakdown of landings of finfish in the UK in 2013 (proportions of total weight landed in Shetland, in the rest of Scotland, and in England, Wales & Northern Ireland). (Excluding shellfish.)

Whitefish

'Whitefish' includes cod, haddock, whiting, monkfish, flatfish and similar species. Squid, nephrops (aka. 'prawns', scampi, langoustine, etc.) and cuttlefish are also included here - although they are technically shellfish - as they are primarily caught by whitefish fishing vessels.

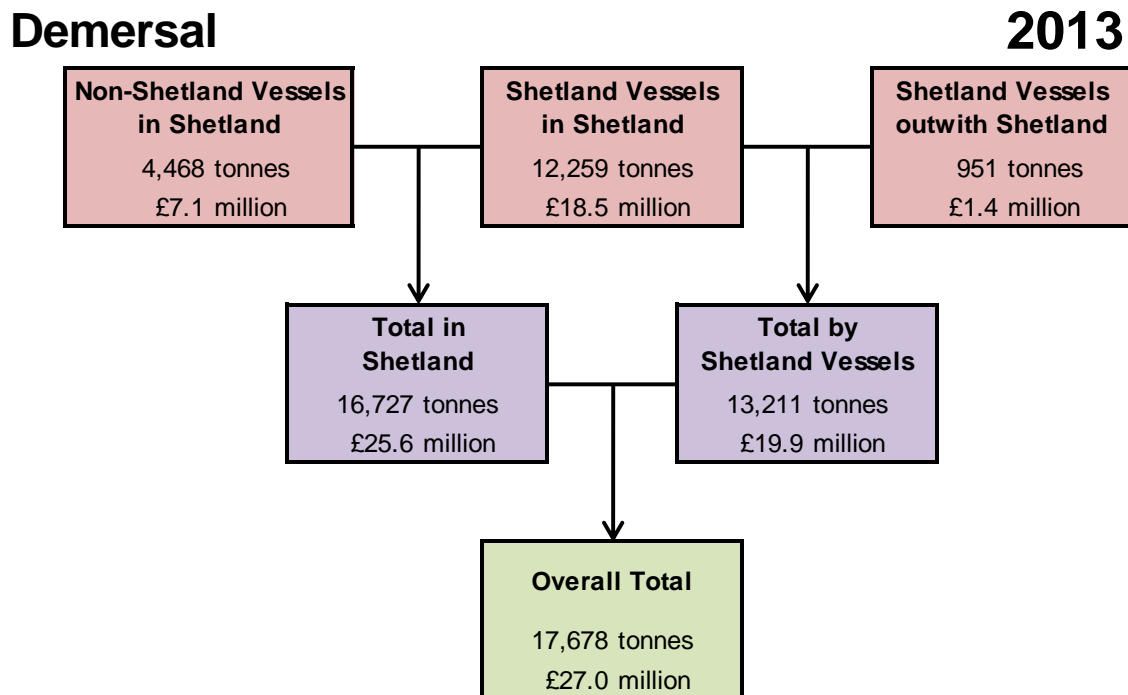


Figure 6 Summary breakdown of the weight and value of whitefish landed in Shetland and by Shetland vessels in 2013.

A total of almost 17,000 tonnes of whitefish worth about £26 million were landed in Shetland in 2013 (Figure 6). Three-quarters of this (73% by weight) was landed by local fishing vessels.

In total, Shetland fishing vessels landed just over 13,200 tonnes of whitefish almost £20 million in 2013, most of it (93% by weight) in Shetland.

The weight and value of whitefish landed in Shetland in 2013 were substantially greater than in 2012 (by 19% and 16% respectively) (Figure 7). Landings of whitefish by Shetland and non-Shetland fishing vessels increased by similar amounts (19% and 20%, respectively, by weight).

Fishing Landings in Shetland and by the Shetland Fleet – 2013

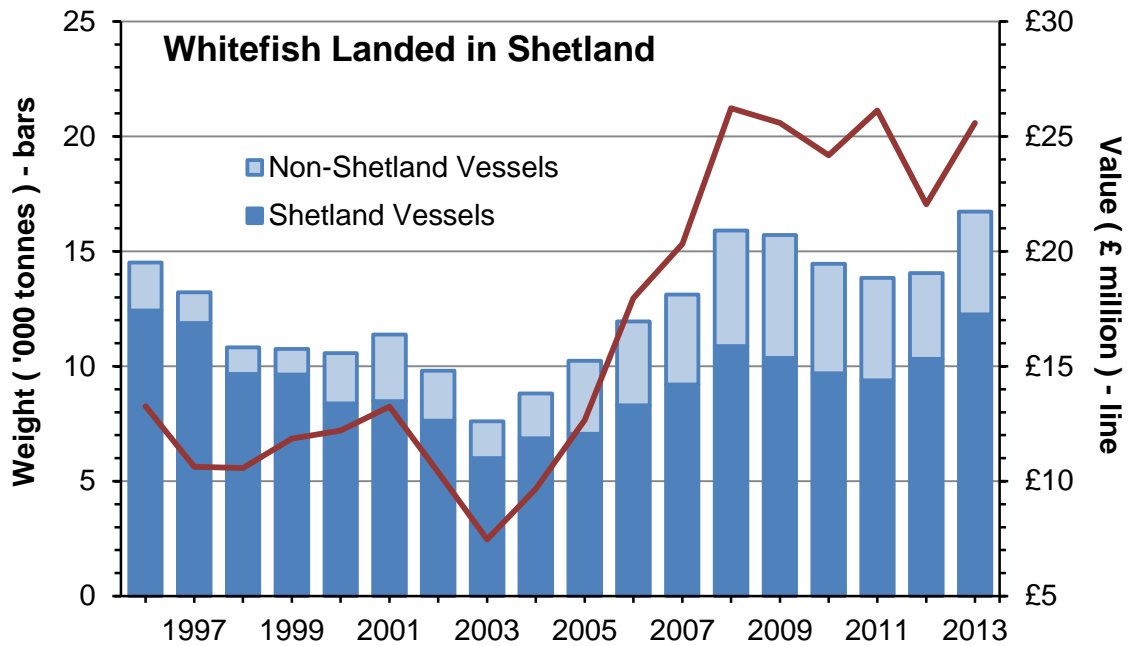


Figure 7 The weight (bars) and value (line) of whitefish landed in Shetland from 1996 to 2013.

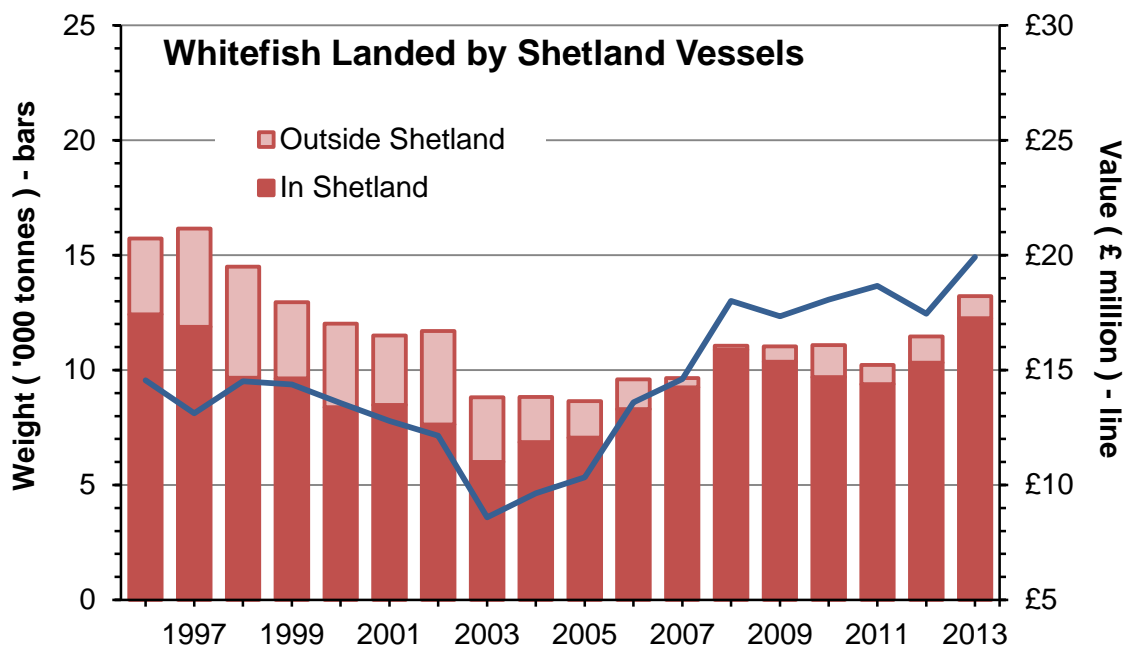


Figure 8 The weight (bars) and value (line) of whitefish landed by Shetland fishing vessels from 1996 to 2013.

Overall, the total weight of whitefish landed by Shetland fishing vessels increased by 15% in 2013 (Figure 8), while their value increased by 14%. Landings of whitefish by Shetland vessels outside Shetland decreased by 17% in 2013, while their landings in Shetland increased by 19%. (In recent years whitefish landings outside have resulted from vessels travelling further afield to find alternative fishing opportunities, for example off North-East Scotland and North-East England, and as far afield as the English Channel. The former practice of 'tripping' to mainland markets no longer occurs.)

It is estimated that sales through the local fish markets accounted for about 83% (by weight) of the whitefish landed in Shetland in 2013. The remainder is shipped directly south, either for sale at Mainland fish markets or directly to processors.

Composition of Whitefish Landings

The weight and value of landings of the principal whitefish species in Shetland in 2013 are summarised in Table 3. Figure 9 and Figure 10 show the trends in the weights and value of landings in Shetland of the main whitefish species over the last decade and Figure 11 shows the changes in the weight and value of landings of the top-10 species (by value) from 2012 to 2013.

Haddock was the most valuable whitefish species landed in Shetland in 2013, accounting for 26% of the value of landings, with cod 2nd (at 20%) and monks 3rd (at 14%). The weight and value of monks landed in Shetland in 2013 were less than half those in 2009 (mainly due to changes in fishing practices as a result of limits on fishing effort - 'days-at-sea').

The biggest increases in whitefish landings in Shetland 2013 were in haddock, lemon sole and plaice (Figure 11).

Fishing Landings in Shetland and by the Shetland Fleet – 2013

Table 3 The top-10 whitefish species (ranked by value) landed in Shetland in 2013.

	Weight (tonnes)	Value (£ m)
Haddock	5,121	£6.71
Cod	2,592	£5.09
Monks	1,101	£3.48
Whiting	2,453	£2.50
Megrims	843	£2.22
Saithe	1,983	£1.56
Ling	916	£1.20
Lemon Sole	187	£0.65
Hake	278	£0.44
Plaice	480	£0.34
Others	772	£1.39
Total	16,727	£25.68

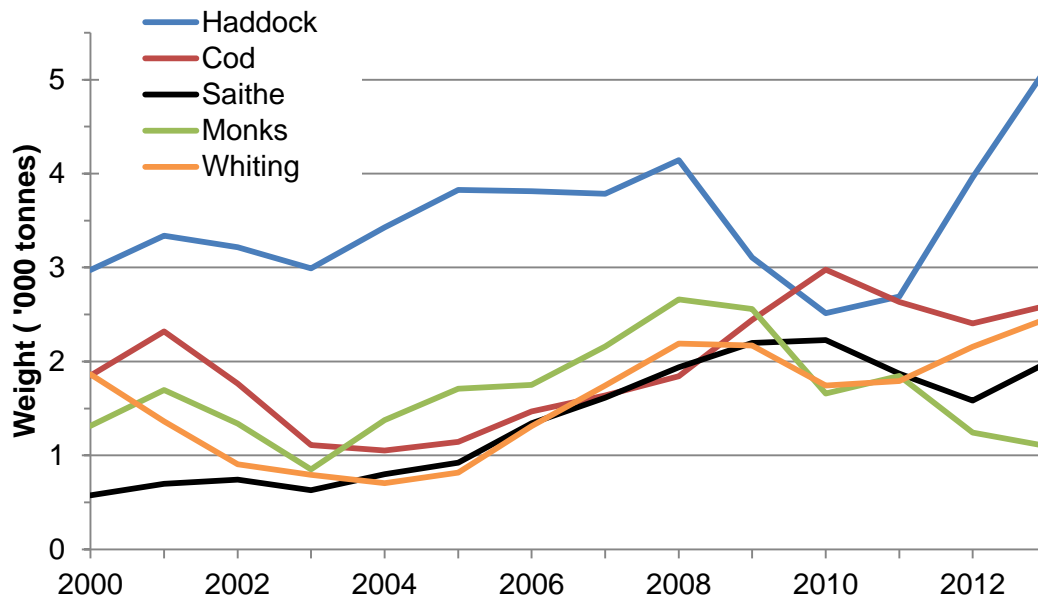


Figure 9 The weights of the principal whitefish species landed in Shetland from 2000 to 2013.

Fishing Landings in Shetland and by the Shetland Fleet – 2013

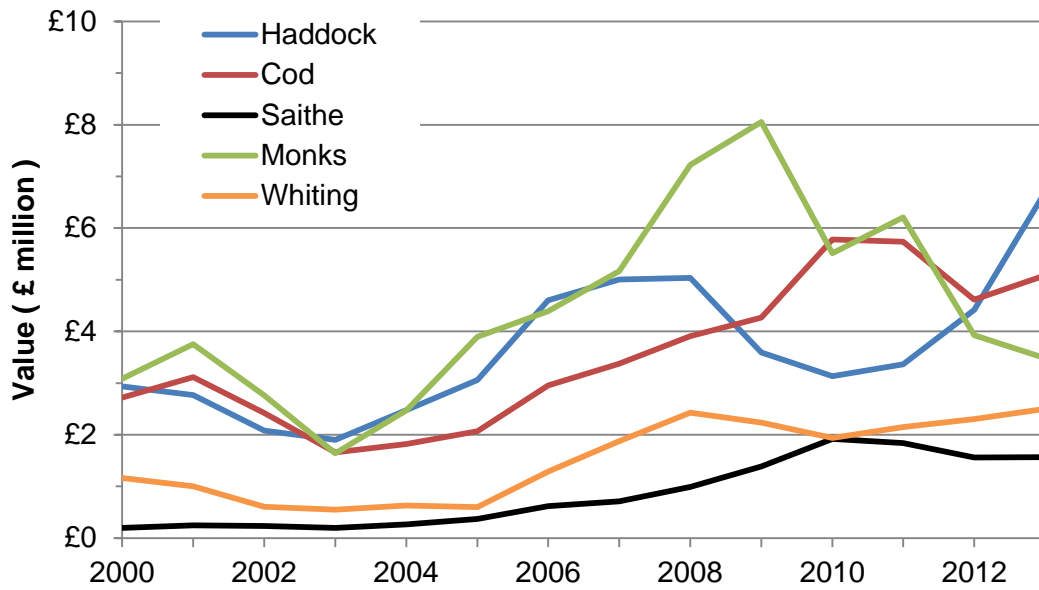


Figure 10 The values of the principal whitefish species landed in Shetland from 2000 to 2013.

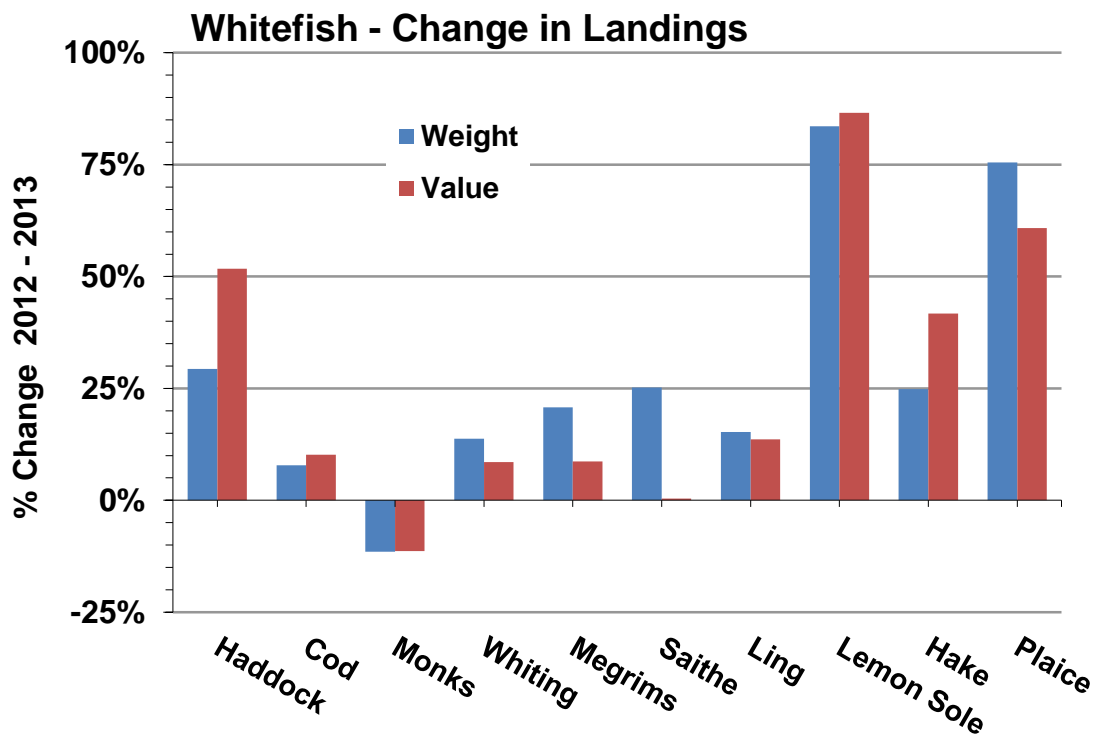


Figure 11 Percentage changes in the weight and value of landings of the top-10 whitefish species (by value) in Shetland from 2012 to 2013.

Places of Whitefish Landing

Two-thirds (67%) of the whitefish landed in Shetland in 2013 were landed in Lerwick, 22% in Scalloway, 10% in Cullivoe, and 1% elsewhere in Shetland (Figure 12). Landings increased in Lerwick (by 18%), Scalloway (by 28%), and Cullivoe (by 32%).

The majority of landings of whitefish by non-Shetland vessels were made in Lerwick (83%), with the balance in Scalloway (16%) and Cullivoe (1%). Non-Shetland vessels accounted for 33% of whitefish landings in Lerwick, 19% of landings in Scalloway and only 3% in Cullivoe.

Over the decade from 2004 to 2013 the weight of whitefish landed in Lerwick increased by 70%, that in Scalloway tripled (+306%), and that in Cullivoe almost doubled (+87%).

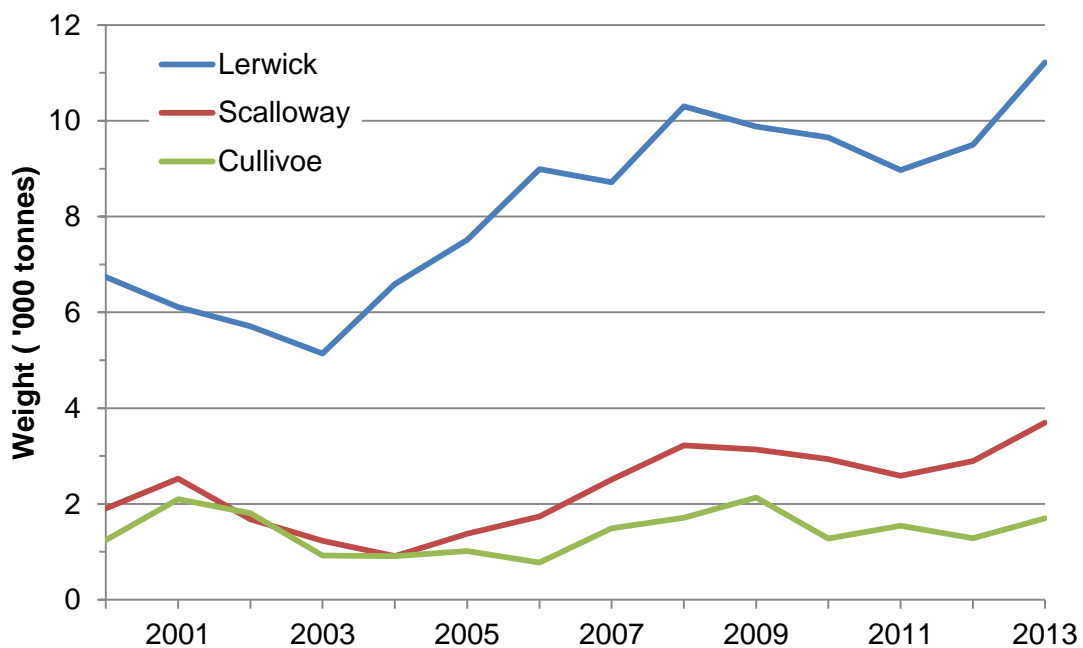


Figure 12 The weight of whitefish landed in Lerwick, Scalloway and Cullivoe from 2000 to 2013.

National Context

In a national context, 14% (by weight) of all the whitefish landed in Scotland in 2013, and 11% of all the whitefish landed in the UK, were landed in Shetland. More whitefish was landed in Lerwick than in any other port in the UK except Peterhead. For landings of whitefish by UK vessels Scalloway ranked 9th and Cullivoe 12th in the UK.

Pelagic Fish

Pelagic fish include mackerel, herring, blue whiting and similar species. Past pelagic landings have included both landings for human consumption and for reduction to fish meal, although they are now almost entirely for human consumption.

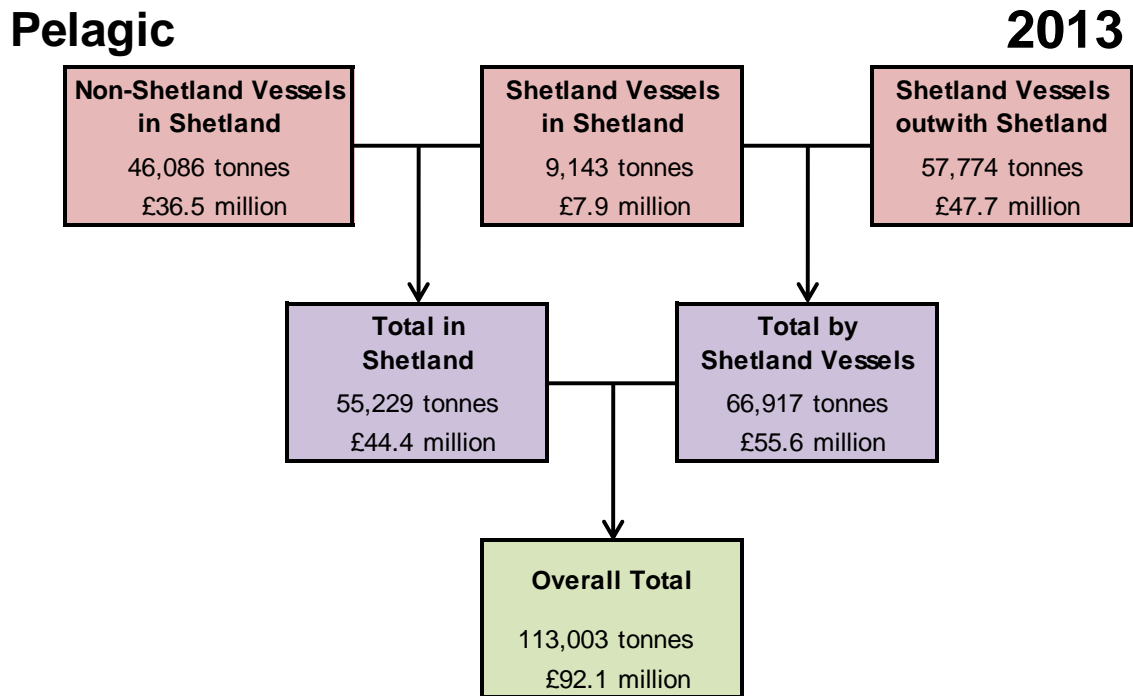


Figure 13 Summary breakdown of the weight and value of pelagic fish landed in Shetland and by Shetland vessels in 2013.

A total of about 55,000 tonnes of pelagic fish, worth about £44 million were landed in Shetland in 2013 (Figure 13), 17% by local fishing vessels. With the exception of a very small quantity of hand-line caught mackerel, all pelagic fish were landed in Lerwick. Shetland fishing vessels landed a further 58,000 tonnes of pelagic fish worth £48 million, outside Shetland. Of this, about two-thirds (72%) was landed in Norway, with most of the balance in either Scotland or Denmark.

Pelagic landings in Shetland were dominated by mackerel, which accounted for 79% of their weight and 90% of their value (£40 million). In addition to the main landings of mackerel at the Shetland Catch factory in Lerwick about 39 tonnes of hand-line caught mackerel, worth about £100,000, was sold through the Shetland Seafood Auction in 2013.

Fishing Landings in Shetland and by the Shetland Fleet – 2013

The weight of pelagic fish landed in Shetland in 2013 was slightly (6%) higher than in 2012 (Figure 14), but broadly similar to the last few years. The value of pelagic landings was 17% higher than in 2012, but remained below the levels seen in the few years leading up to 2011.

Of the pelagic fish landed in Shetland by non-Shetland fishing vessels in 2012, more than half (59%) was landed by other Scottish vessels (Figure 15) and 18% by Danish vessels. Norwegian, Swedish, and Irish vessels accounted for the balance.

The weight and value of pelagic fish landed by Shetland fishing vessels in 2013 were very similar to those in 2012 (Figure 16).

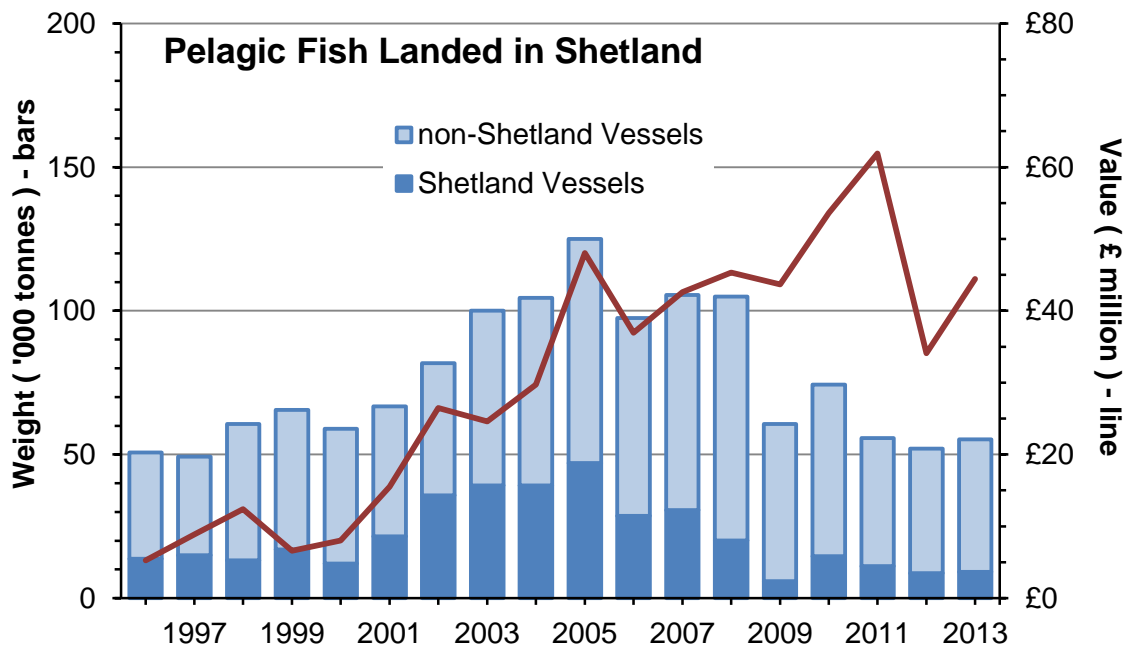


Figure 14 The weight (bars) and value (line) of pelagic fish landed in Shetland from 1996 to 2013.

Fishing Landings in Shetland and by the Shetland Fleet – 2013

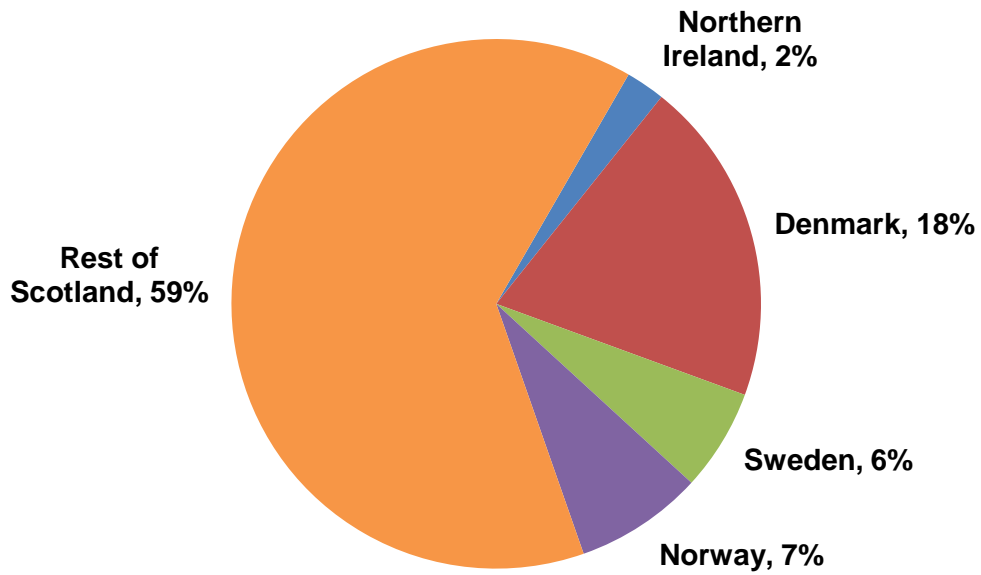


Figure 15 Breakdown by nationality of landings of pelagic fish in Shetland in 2013 by non-Shetland vessels.

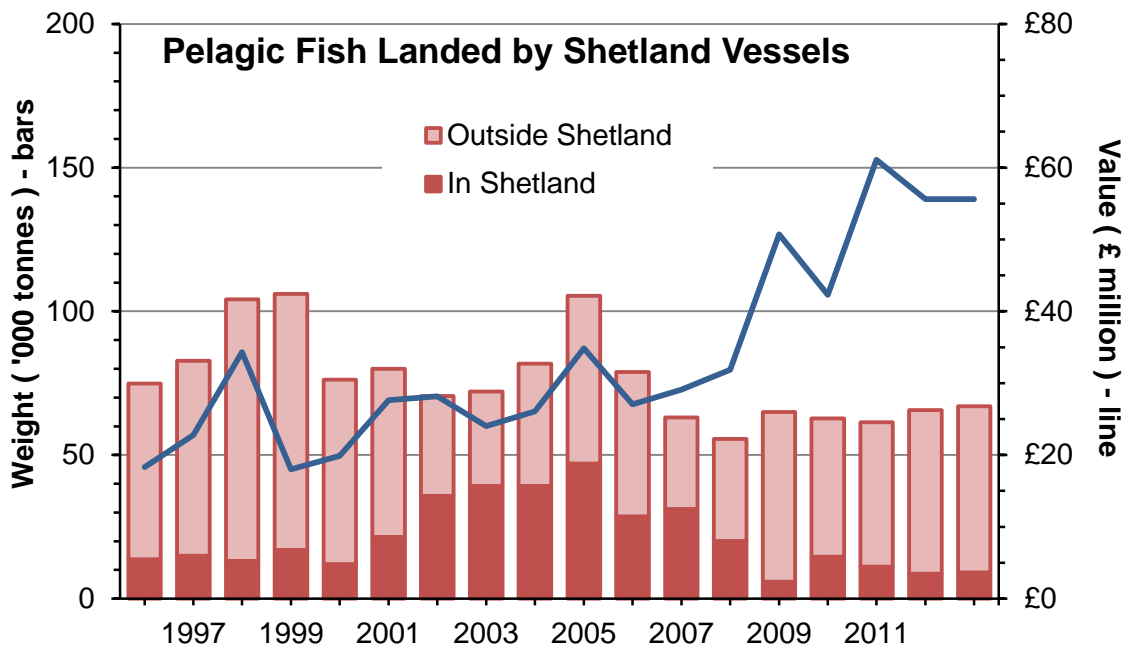


Figure 16 The weight (bars) and value (line) of pelagic fish landed by Shetland vessels from 1996 to 2013.

Shellfish

Shellfish includes lobsters, crabs (brown, green and velvet), scallops and buckies (whelks). Squid, nephrops and cuttlefish, although technically shellfish, are included with whitefish (above) as they are mainly caught by whitefish vessels.

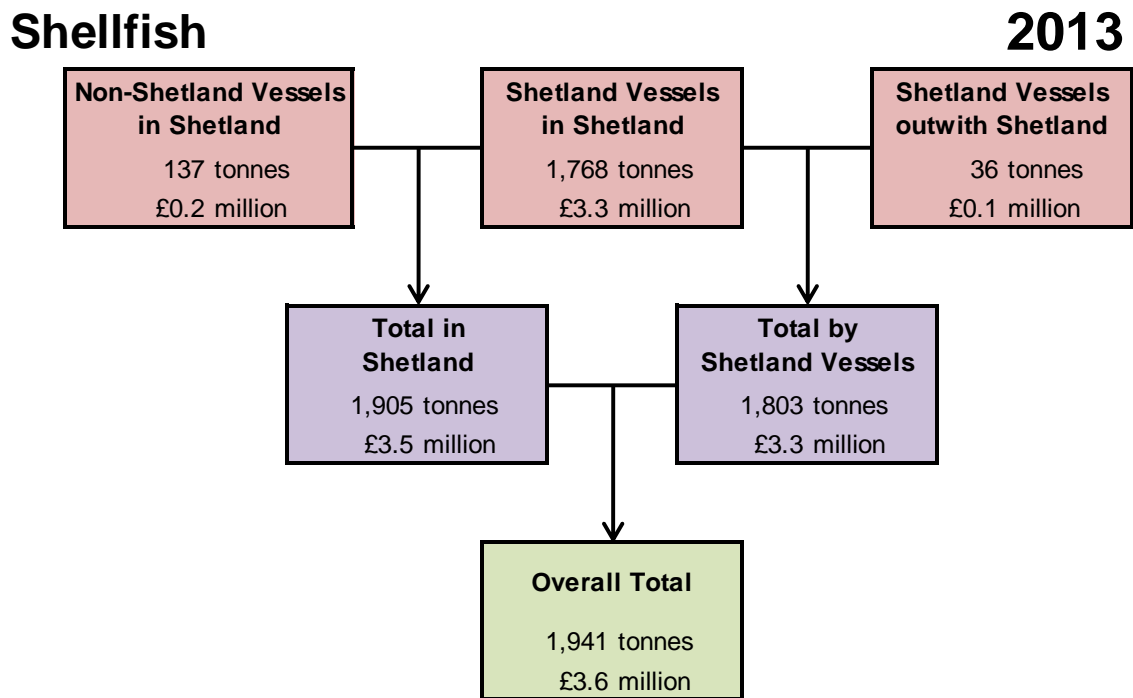


Figure 17 Summary breakdown of the weight and value of shellfish landed in Shetland and by Shetland vessels in 2013.

About 1,900 tonnes of shellfish worth £3.5 million were landed in Shetland in 2013, most of it (93%) by Shetland registered fishing vessels (Figure 17). (Much of the balance may have been landed by vessels based in Shetland but not registered here.) Only a very small quantity of shellfish was landed outside Shetland by local vessels.

The weight and value of shellfish landed in Shetland in 2013 was slightly (3%) higher than in 2012, while the weight was almost unchanged (Figure 18).

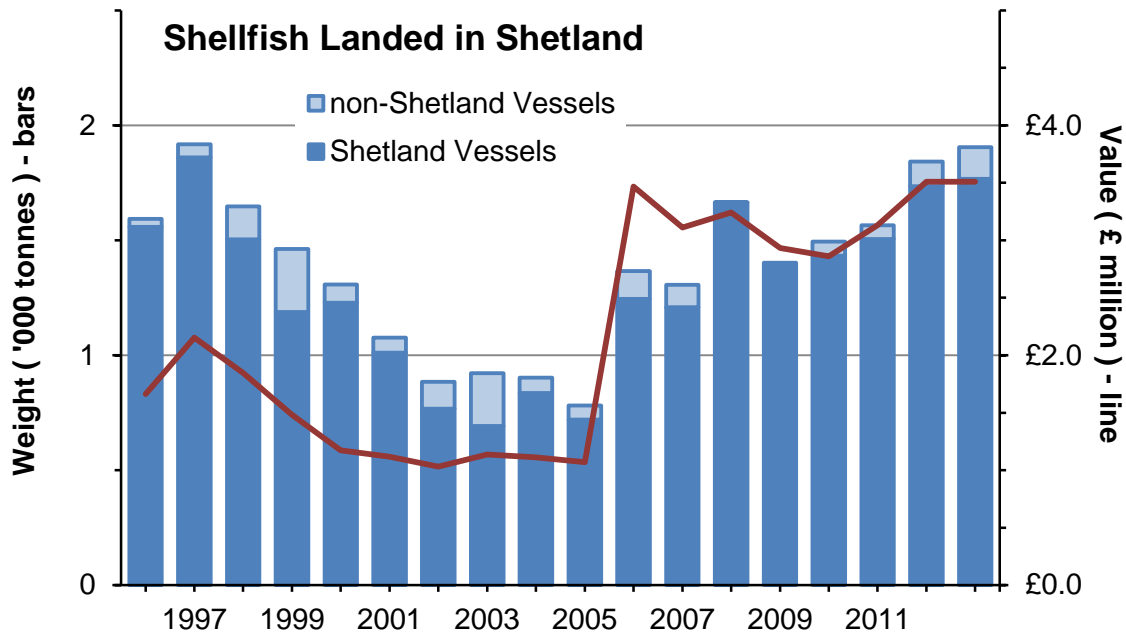


Figure 18 The weight (bars) and value (line) of shellfish landed in Shetland from 1996 to 2013. (The jump in landings from 2005 to 2006 probably reflects the improvement in data collection arising from the registration of buyers and sellers.)

Landings of shellfish were much more widely distributed around Shetland than was the case for landings of whitefish or pelagic fish. Just over one-quarter of shellfish landings were made in Lerwick (28%), while Scalloway accounted for only 8% of shellfish landings (Figure 20). Other principal landings places for shellfish included Skeld, Sullom Voe / Toft, Mid Yell, Whalsay, West Burrafirth, Skerries and Vidlin.

Fishing Landings in Shetland and by the Shetland Fleet – 2013

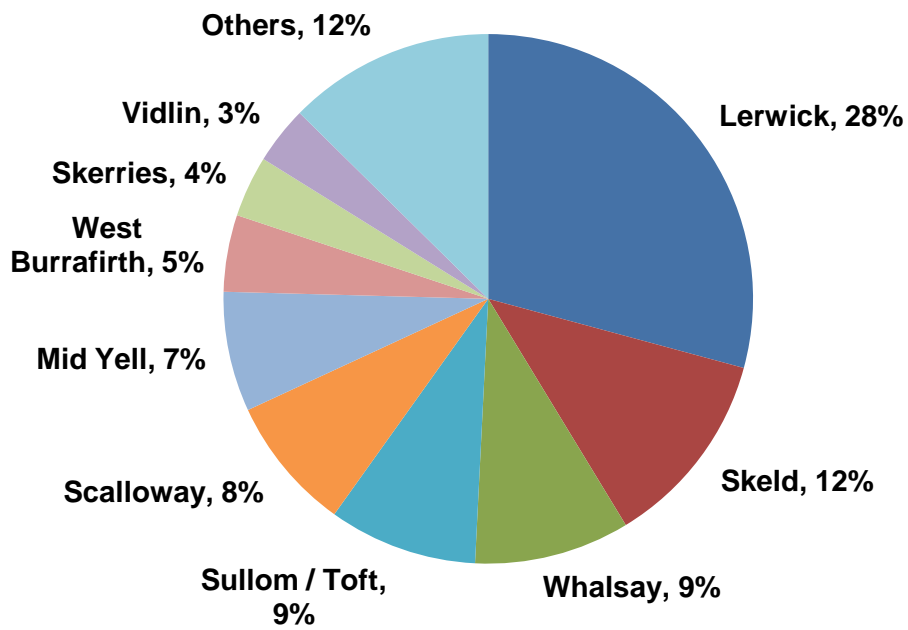


Figure 19 Breakdown of landings of shellfish in Shetland in 2013 by place of landing.

Catches in the Waters Around Shetland

Figure 20 summarises the weight and value of landings of all fish caught in the waters around Shetland in 2013. These data are based on fishermen’s log-sheets that record the locations of catches and are overall totals for all species, all nationalities of vessel, and landings everywhere (not just in Shetland).

Landings from the whole area shown in Figure 20 totalled 164,000 tonnes in 2013, worth £162 million. A total of some 106,000 tonnes of fish, worth £100 million, were landed from the smaller, inner area (with the darker shading). The most valuable individual areas are to the west and north of Shetland.



Figure 20 The weight and value of landings in 2013 of fish caught in the waters around Shetland (including landings everywhere by all vessels of all species). Individual rectangles are approximately 30 nautical miles on a side. The smaller ‘inner’ area referred to in the text is more darkly shaded.

Fishing Landings in Shetland and by the Shetland Fleet – 2013

On a per-area basis, the value of landings from the whole area shown in Figure 20 averaged about £7,100 per square nautical mile (NM) (£2,100 / km²), while for the smaller 'inner' area the average was about £12,400 / NM² (£3,600 / km²). However, there was substantial variation between areas, and within the squares shown in Figure 20, with some areas having much higher averages. The highest average value per area was in the central square of Figure 20, which includes the Burra Haaf fishing ground, at £23,800 / NM² (£6,900 / km²)

The weight of fish landed from the waters around Shetland decreased slightly (by 2%) from 2012 to 2013 (Figure 21), but their value increased (by 8%). The weight of fish landed from the 'inner' area also fell (by 6%) while their value also increased (by 11%).

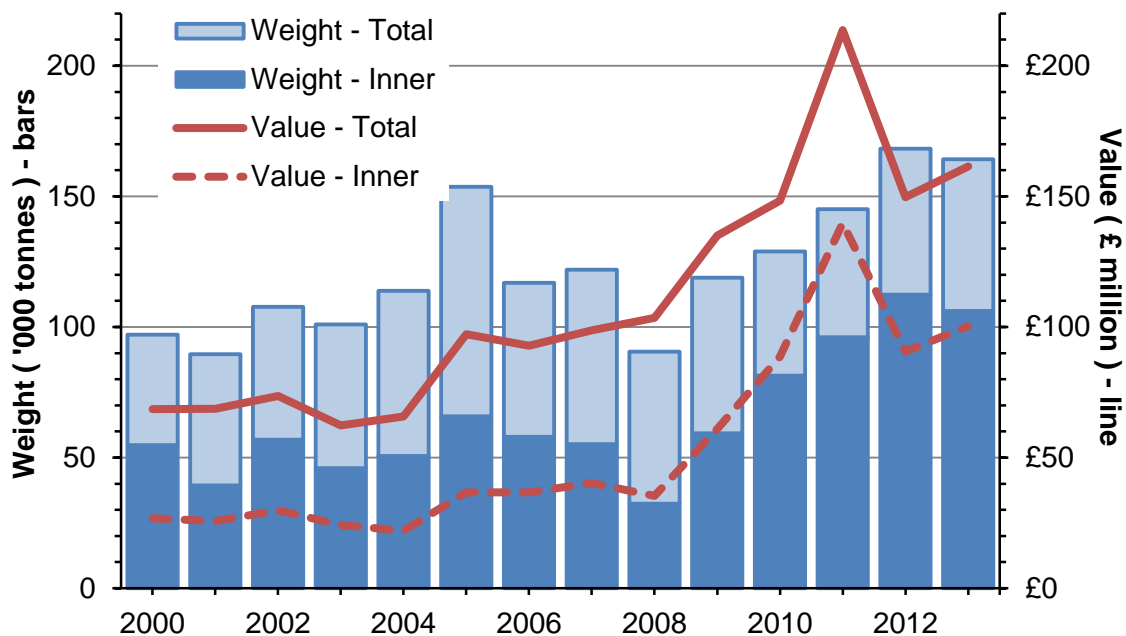


Figure 21 The weights (bars) and values (lines) of all fish landed from the area around Shetland shown in Figure 20, and from the smaller 'inner' area.

Outlook for 2014

Official figures for landings of fish in Shetland in 2014 will not be available until the latter part of 2015.

However, figures from the Shetland Seafood Auction Co. show that for the first 10 months of 2014 (Jan – Oct) the weight of whitefish sold through the local fish markets was slightly (2%) greater than in the same period of 2013, while the value was up by 19%. (It is estimated that about 83% of whitefish landed in Shetland is sold through the Shetland Seafood Auction). If these trends continue until the end of the year it suggests that 2014 may see whitefish landings as least as good as those in 2013.

Information from Shetland Catch Ltd. suggests that landings of pelagic species in 2014 are likely to be similar to those in 2013. Although landings of herring are expected to be lower this is likely to be outweighed by larger landings of mackerel.

Information on shellfish landings in 2014 are not available at this time.