

**Fish Landings in Shetland
and by the Shetland Fleet
in
2009**

Ian R. Napier
November 2010

Introduction

This review summarises the results of an analyses of the official statistics^{*} for the weight[†] and value of fish landed in Shetland, and of fish landed by Shetland fishing vessels, in 2009 (the last year for which detailed data are available).

These data provide a more comprehensive picture of 'Shetland landings' than the published *Scottish Fisheries Statistics*, 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@nafc.uhi.ac.uk

^{*} These statistics were supplied by the Sea Fisheries Division of the Scottish Government's Marine Directorate (now part of Marine Scotland).

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

Overall

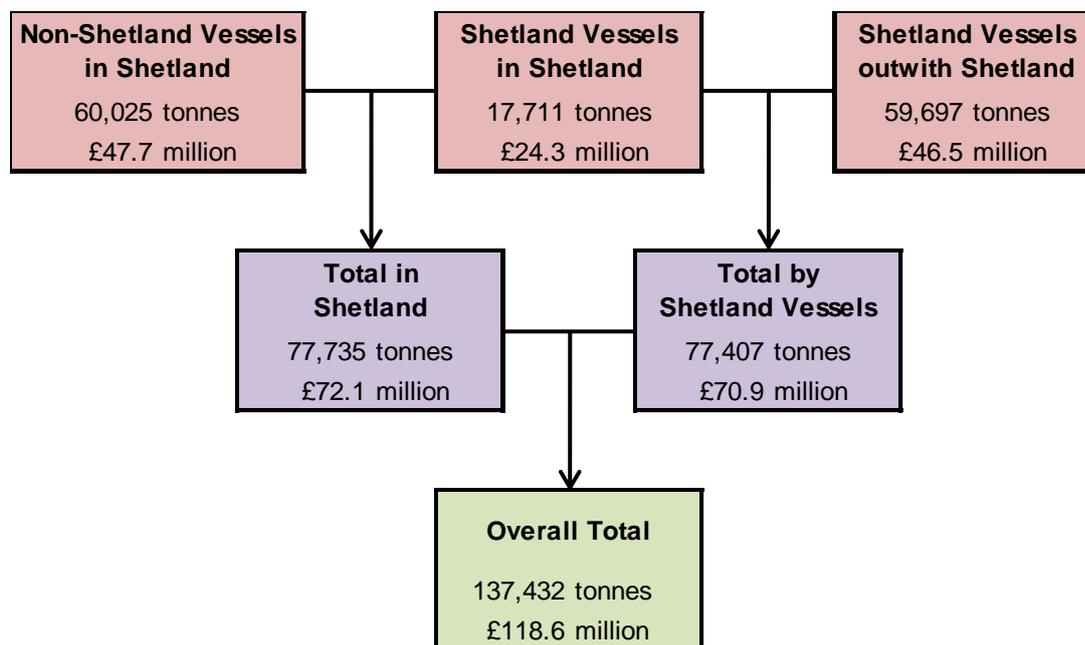


Figure 1 Summary breakdown of the weight and value of all fish landed in Shetland and by Shetland vessels in 2009.

A total of almost 78,000 tonnes of fish worth £72 million were landed in Shetland in 2008 (Figure 1). Of these landings, Shetland fishing vessels accounted for almost 18,000 tonnes (23% of the total weight) worth £24 million (34% of the total value).

The weight of fish landed in Shetland in 2009 was substantially less than in 2008 (down 37%), but the value was only slightly (4%) less (Figure 2). This fall in landings reverses a general upwards trend seen over the last decade or so. Most of the decline was in landings of pelagic fish, and is discussed below (p. 9).

Pelagic species (mackerel, herring, etc.) accounted for the vast majority of the fish landed in Shetland (78% by weight, 61% by value), but had the smallest unit-value (Table 1). Whitefish (haddock, monks, etc.) accounted for only 20% of the weight of landings but more than one third (35%) of their value. Shellfish (crabs, scallops, etc.) accounted for the smallest proportion of landings (2% by weight, 4% by value) but had the highest unit-value.

Shetland fishing vessels landed an additional 60,000 tonnes of fish worth over £46 million, most of it pelagic, outside Shetland. This brings the notional total of 'Shetland' fish landings to 137,000 tonnes and £119 million (i.e. landings in Shetland plus landings elsewhere by Shetland vessels).

Fishing Landings in Shetland and by the Shetland Fleet - **2009**

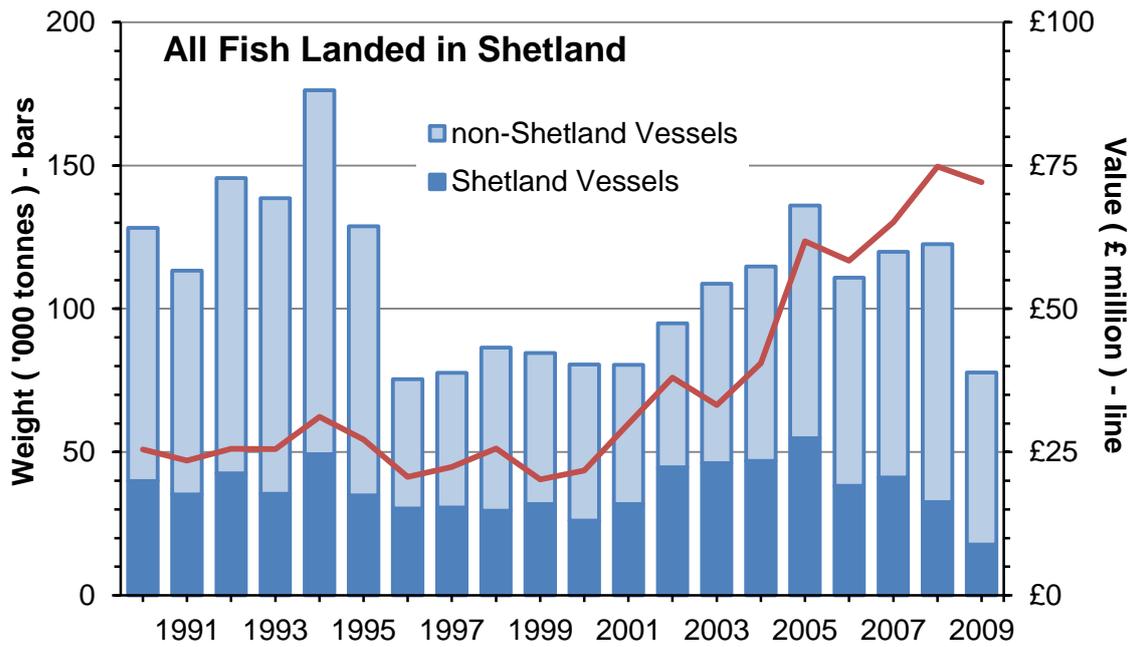


Figure 2 The weight (bars) and value (line) of all fish landed in Shetland from 1990 to 2009.

Table 1 Total weights and values of fish landed in Shetland in 2009 by species group.

	Weight		Value		Unit Value
	tonnes	%	£ m	%	£ / kg
Pelagic Fish	60,636	78%	£43.68	61%	£0.72
Whitefish	15,704	20%	£25.58	35%	£1.63
Shellfish	1,395	2%	£2.81	4%	£2.01
Total	77,735		£72.07		£0.93

Whitefish

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

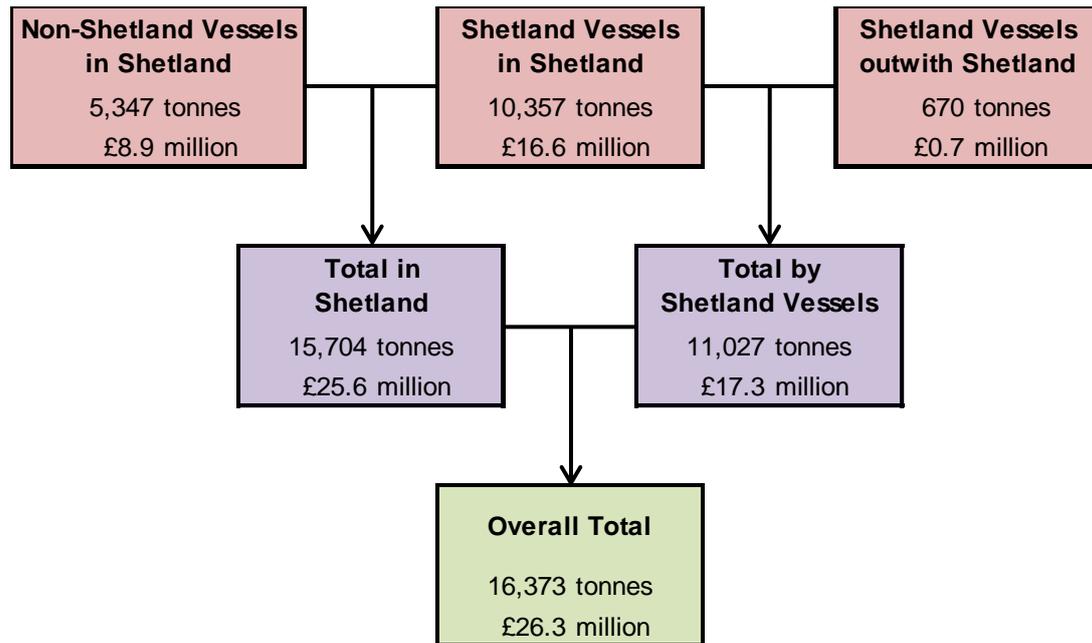


Figure 3 Summary breakdown of the weight and value of whitefish landed in Shetland and by Shetland vessels in 2009.

A total of 15,700 tonnes of whitefish worth about £26 million were landed in Shetland in 2009, two thirds (66%) of it by local fishing vessels (Figure 3). Shetland fishing vessels landed a total of 11,000 tonnes of whitefish worth just over £17 million, most of it (94%) in Shetland.

Whitefish landings in Shetland in 2009 were slightly less than in 2008 (down by 1% in weight and 2% in value), interrupting the upward trend of the previous few years (Figure 4). This decline was mainly in landings by Shetland vessels (down 5%); landings of whitefish by non-Shetland vessels were actually up slightly (by about 6%) in 2009, although this was again much less than the increase seen in recent years.

Fishing Landings in Shetland and by the Shetland Fleet - 2009

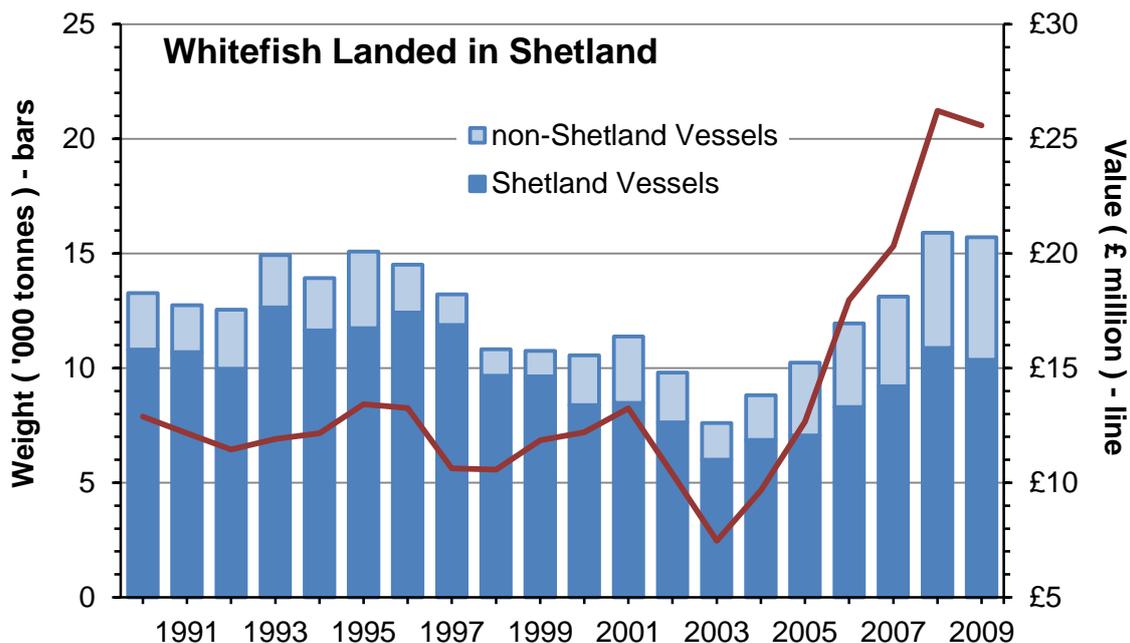


Figure 4 The weight (bars) and value (line) of whitefish landed in Shetland from 1990 to 2009.

Landings by Scottish (i.e. non-Shetland) vessels were slightly greater in 2009 than in 2008 (about 4% in weight, 1% in value), and accounted for about one third of whitefish landings in Shetland; a proportion that has continued to increase slowly in recent years. Although they continue to account for a very small proportion of the total, landings of whitefish by foreign vessels were substantially greater in 2009 (double the weight and more than triple the value).

The overall decline in whitefish landings in Shetland, especially by local vessels, was almost certainly a result of tighter fisheries regulations in 2009, including reductions in quotas (e.g. for haddock, whiting and saithe) and restrictions on fishing effort (days at sea) under the cod recovery plan

It is estimated that 82% (by weight) of the whitefish landed in Shetland is sold through the local fish markets by Shetland Seafood Auctions Ltd. The remainder is shipped directly south, either for sale at Mainland fish markets or straight to processors.

Composition of Landings

Monkfish was the single most important whitefish species landed in Shetland in 2009, accounting for almost one third of the value of all whitefish landings (Table 2). The next two species (cod and haddock) accounted for almost another third.

Table 2 The top-10 whitefish species (by value) landed in Shetland in 2009.

	Weight	Value
Monks	16%	31%
Cod	16%	17%
Haddock	20%	14%
Whiting	14%	9%
Megrim	4%	8%
Saithe	14%	5%
Prawns (Nephrops)	2%	4%
Ling	5%	3%
Squid	1%	1%
Lythe (Pollack)	1%	1%
Others	6%	6%
TOTAL	15,704 t.	£25.6 m

Places of Landing

About two-thirds (65%) of the whitefish landed in Shetland in 2009 were landed in Lerwick, 20% in Scalloway, 14% in the North Isles (probably all in Cullivoe), and only 1% elsewhere in Shetland (Figure 5).

The majority of landings of whitefish by non-Shetland vessels were made in Lerwick (85%), with the balance in Scalloway (12%) and Cullivoe (3%). Non-Shetland vessels accounted for 44% of whitefish landings in Lerwick, 20% of landings in Scalloway and only 8% in Cullivoe.

Fishing Landings in Shetland and by the Shetland Fleet - 2009

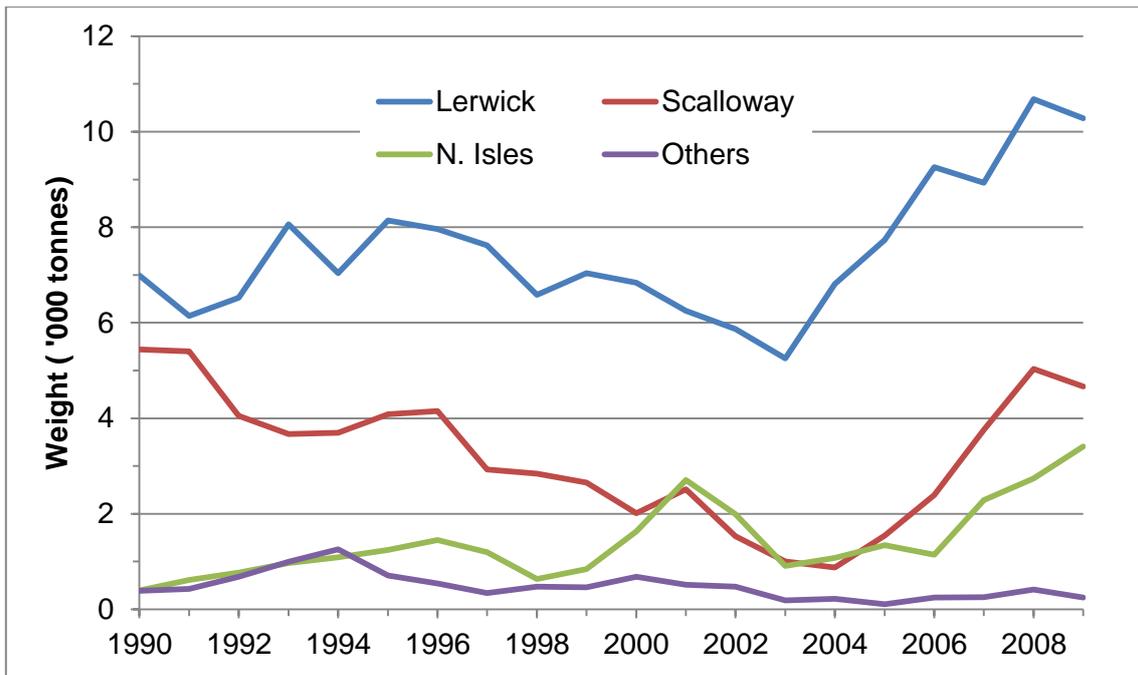


Figure 5 The weight of whitefish landed in Lerwick, Scalloway, the North Isles (primarily Cullivoe) and other Shetland ports in 2009.

Pelagic Fish

Pelagic fish include mackerel, herring, blue whiting and similar species. Pelagic landings include both landings for human consumption and for reduction to fish meal.

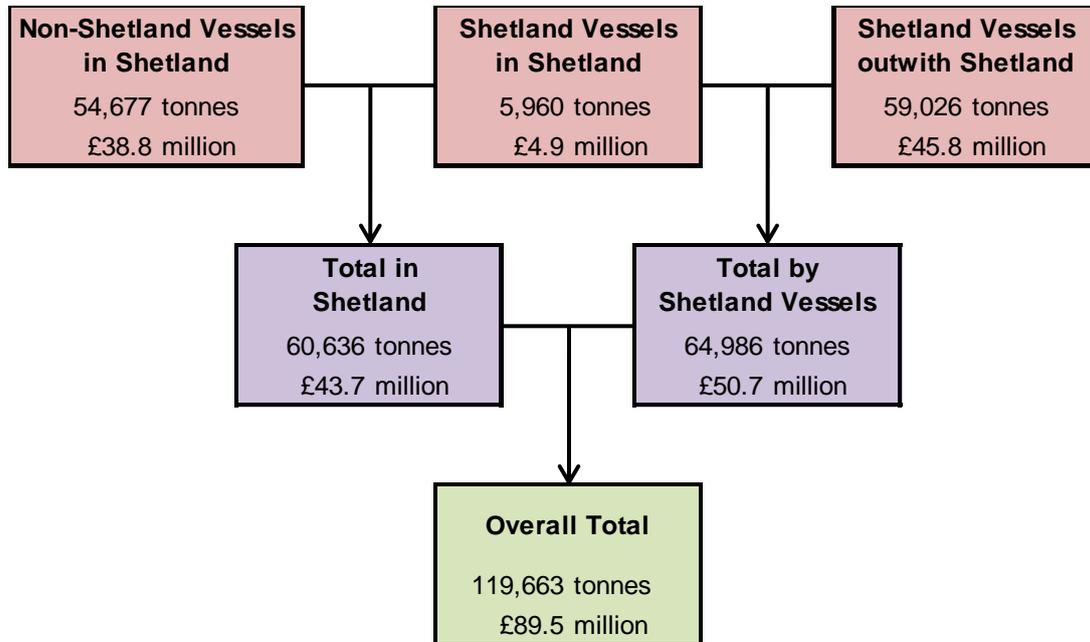


Figure 6 Summary breakdown of the weight and value of pelagic fish landed in Shetland and by Shetland vessels in 2009.

A total of just over 60,000 tonnes of pelagic fish, worth about £44 million were landed in Shetland in 2009, 10% of it by local fishing vessels (Figure 6). Shetland fishing vessels landed a total of almost 65,000 tonnes of pelagic fish worth £51 million, about 90% of it outside Shetland. With the exception of a small quantity of hand-line caught mackerel, all pelagic fish were landed in Lerwick.

The weight of pelagic fish landed in Shetland in 2009 was substantially less than in 2008 (a reduction of 42%; Figure 7) although the value was only down by a small amount (4%). This was due to reductions in landings of herring (down 84%) and blue whiting (down 71%) (**Error! Reference source not found.**). The fall in landings of herring was partly due to reductions in quotas but mainly to reduced market demand for this species. Landings of blue whiting fell because the Shetland Fish Products fish meal factory on Bressay largely stopped taking landings of this and other industrial fish species, concentrating instead on processing offal (from salmon and pelagic fish processing).

Fishing Landings in Shetland and by the Shetland Fleet - 2009

Landings of mackerel were slightly higher in 2009 and accounted for three quarters of the weight and more than 90% of the value of all pelagic fish landed in Shetland.

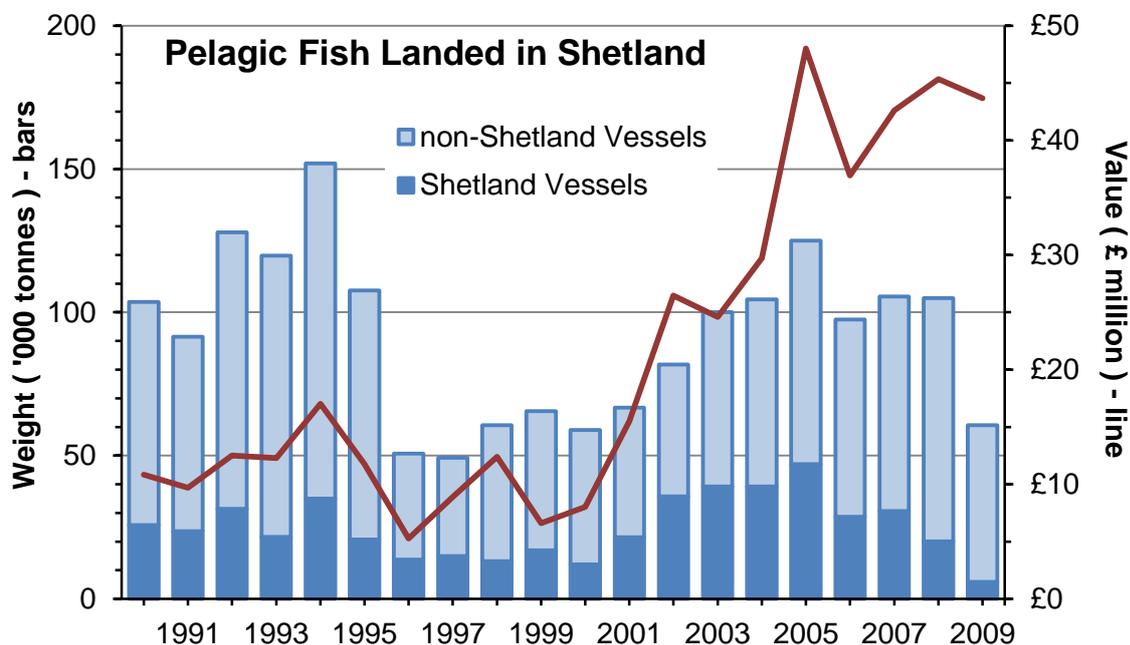


Figure 7 The weight (bars) and value (line) of pelagic fish landed in Shetland from 1990 to 2009.

Of the pelagic fish landed in Shetland by non-Shetland fishing vessels in 2009, most was landed by other Scottish (56%) or Norwegian (17%) vessels. Smaller quantities landed by Swedish (8%), Irish (6%, including Northern Ireland) and Danish (3%) vessels.

Of the pelagic fish landed by Shetland vessels outside Shetland most was landed in Norway (74%) or elsewhere in Scotland (20%).

Shellfish

Shellfish includes lobsters, crabs (brown, green and velvet), scallops and buckies (whelks). Squid and nephrops, although technically shellfish, are included with the whitefish, above. As many of the landings are of small quantities and scattered around many rural and island piers the official statistics for shellfish landings may be somewhat less accurate than for other species.

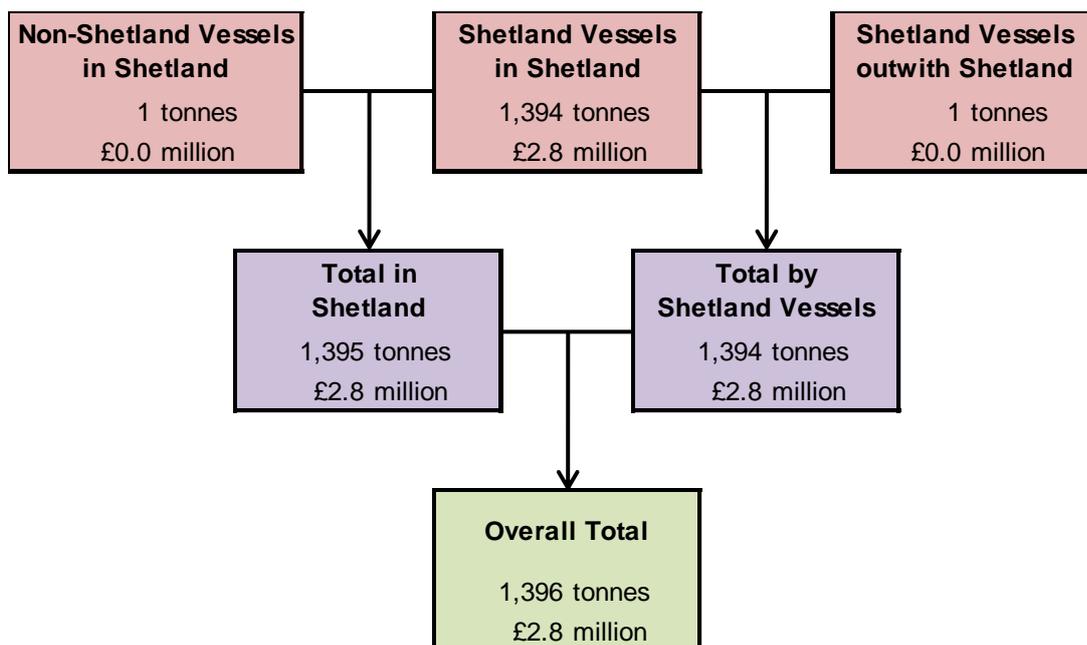


Figure 8 Summary breakdown of the weight and value of shellfish landed in Shetland and by Shetland vessels in 2009.

According to official statistics, a total of 1,400 tonnes of shellfish worth almost £3 million were landed in Shetland in 2009, virtually all of it by local vessels (Figure 8). No shellfish were landed outside Shetland by local vessels.

Shellfish landings in Shetland in 2009 were less than in 2008 (down by 16% in weight and 13% in value), although they remained about the average level of the last few years (**Error! Reference source not found.**).

About one quarter of shellfish landings in 2009 were recorded in Lerwick (24%) or Scalloway (3%); the majority being widely distributed around Shetland including the Central Mainland (34%; Toft, Voe, Sellaness, Vidlin, etc.), the North Isles, West Mainland and Northmavine (10%).

Fishing Landings in Shetland and by the Shetland Fleet - **2009**

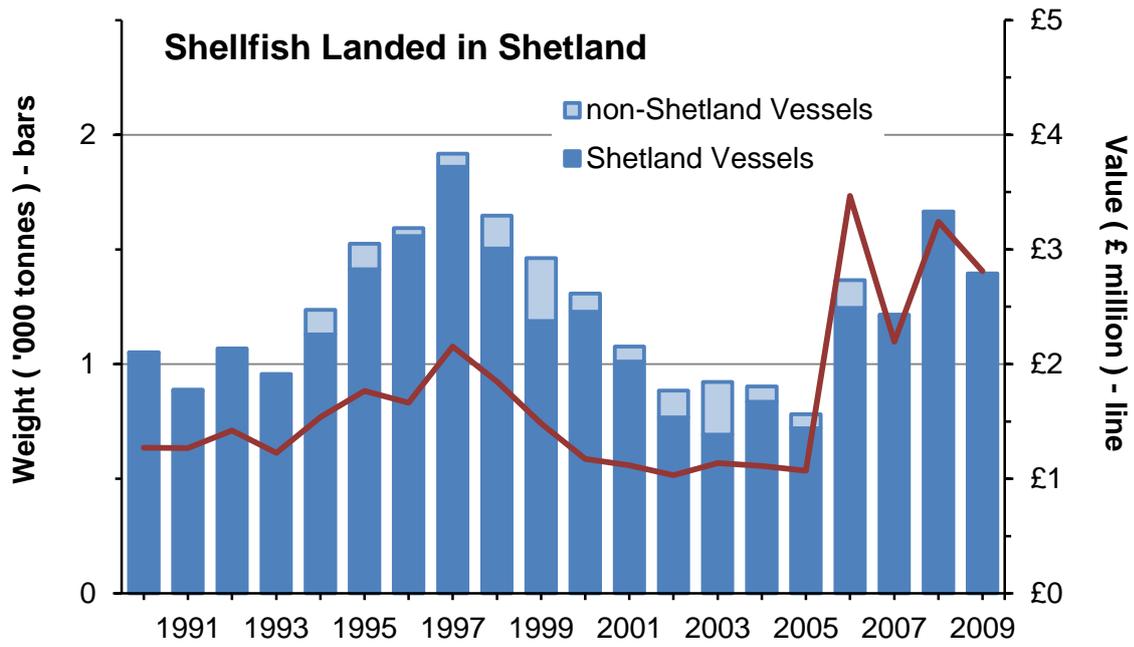


Figure 9 The weight (bars) and value (line) of shellfish landed in Shetland from 1990 to 2009.

Catches in the Waters Around Shetland

Figure 10 summarises the weight and value of landings in 2009 of fish caught in the waters around Shetland. The most valuable individual areas are to the west and north of Shetland. A total of some 59,000 tonnes of fish, worth £61 million were landed from the smaller, inner area (with the darker shading), while landings from the larger outer area totalled almost 120,000 tonnes and £135 million. These figures are overall total for all species, all nationalities of vessel, and landings everywhere (i.e. not just in Shetland).

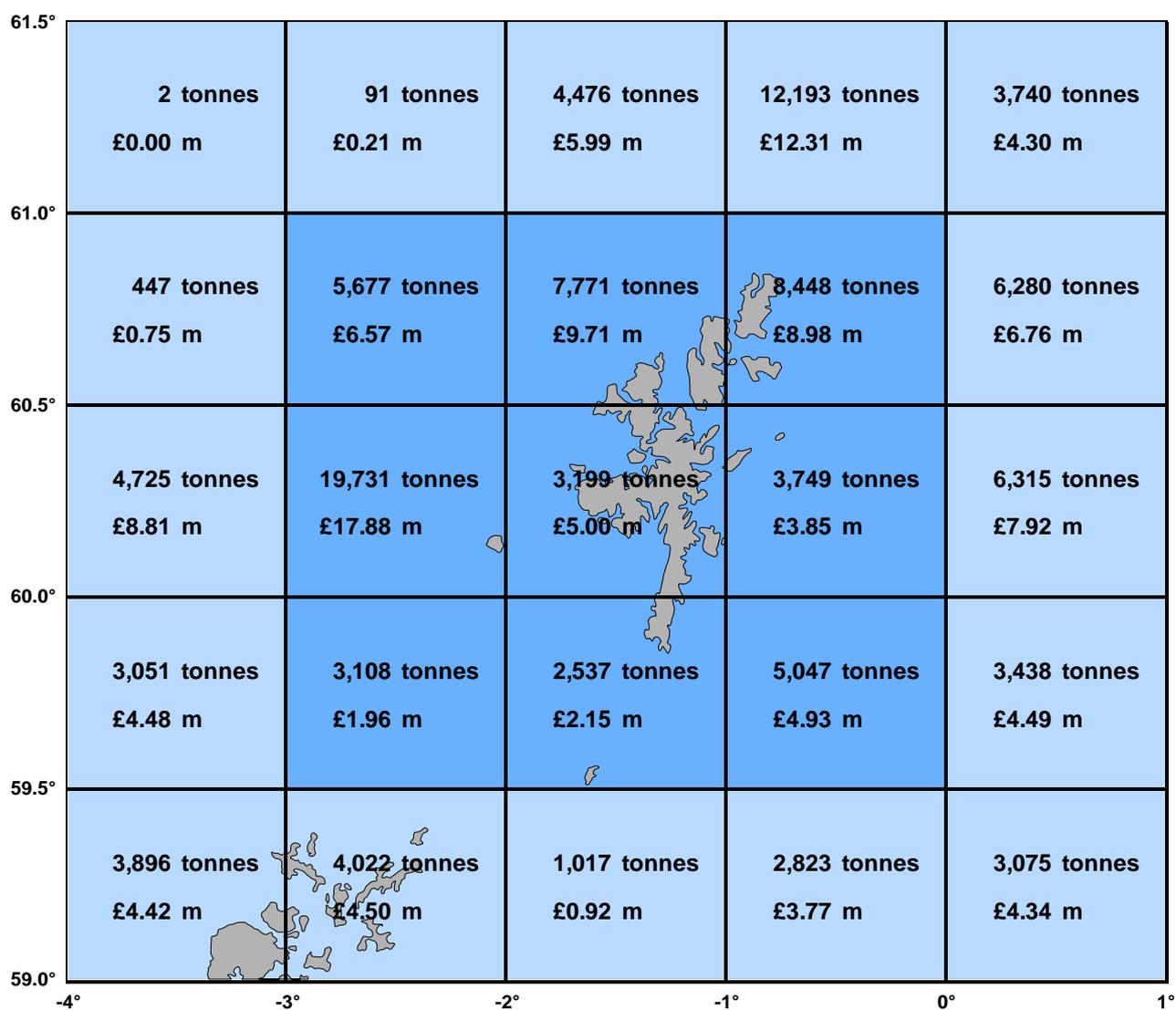


Figure 10 The weight and value of landings in 2009 of fish caught in the waters around Shetland (including landings everywhere of all species, and all vessels). Individual rectangles are approximately 30 nautical miles on a side.

Outlook for 2010

Official figures for landings of fish in Shetland in 2010 will not be available until the latter part of 2011.

However, figures from the Shetland Seafood Auction Co. indicate that the weight of whitefish sold through the auction in the first 10 months of 2010 (Jan. - Oct.) was about 10% lower than in the same period of 2009, while the value was down by about 5%. While this does not include all whitefish landed in Shetland and there may be an upturn before the end of the year, it does suggest that a further decline in whitefish landings in Shetland is likely in 2010. Given the further restrictions on quotas and fishing effort in 2010 that is as might be expected.

On the other hand it appears likely that 2010 will see higher landings of pelagic fish. Figures from the Lerwick Port Authority show that pelagic landings in the first nine months of 2010 (Jan. - Sept.) were up by 22% in weight and 11% in value, compared to the same period in 2009. The total weight and value of pelagic fish landed in Lerwick in the first nine months of 2010 were greater than those in the whole of 2009.