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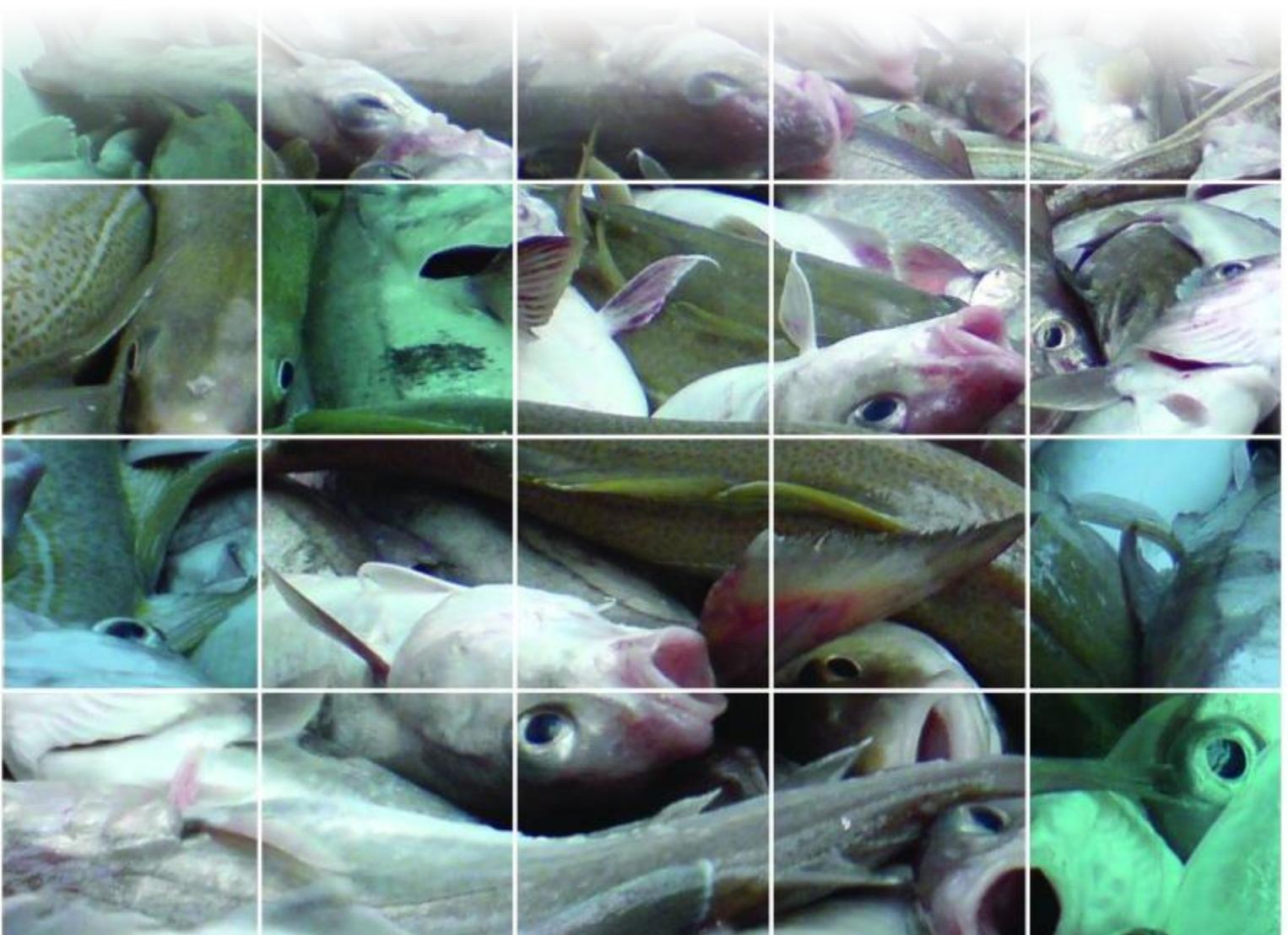
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Fish Landings in Shetland and by the Shetland Fleet in 2012

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Introduction

This review summarises the results of an analyses of the official Scottish Government statistics[†] for the weight[†] and value of fish landed in Shetland, and of fish landed by Shetland fishing vessels, in 2012 (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

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Copies of this and previous NAFC reports and Policy Notes are available at:

<http://www.nafc.ac.uk/Fisheries-Policy-Notes.aspx>

* These statistics 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

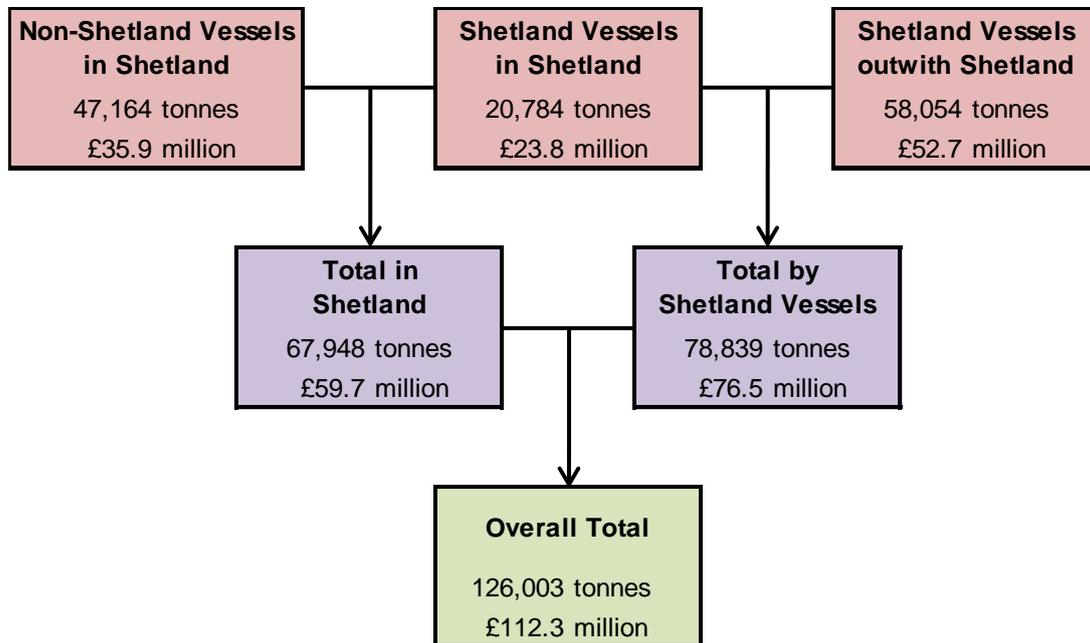


Figure 1 Summary breakdown of the weight and value of all fish landed in Shetland and by Shetland vessels in 2012.

The Scottish Government data show that a total of just under 68,000 tonnes of fish, worth some £60 million, were landed in Shetland in 2012 (Figure 1). Of these landings, Shetland fishing vessels accounted for almost 21,000 tonnes (31% of the total) worth £24 million (40%).

An additional 58,000 tonnes of fish - most of it pelagic - worth almost £53 million were landed outside Shetland by local vessels. This brings the notional total of 'Shetland' fish landings to 126,000 tonnes and £112 million (landings in Shetland plus landings elsewhere by Shetland vessels).

The weight of fish landed in Shetland in 2012 was 5% less than in 2011 (Figure 2) while their value was 35% less. These declines were primarily in landings of pelagic fish (specifically mackerel) and are discussed below (p. 10).

In contrast, the total weight of fish landed by Shetland fishing vessels in 2012 was 8% greater than in 2011 (Figure 3). Their value also declined, but by a much smaller amount (8%) than was the case for landings in Shetland.

Overall the total weight of 'Shetland' fish landings in 2012 was 3% lower than in 2011, while their value was 19% lower.

Fishing Landings in Shetland and by the Shetland Fleet – 2012

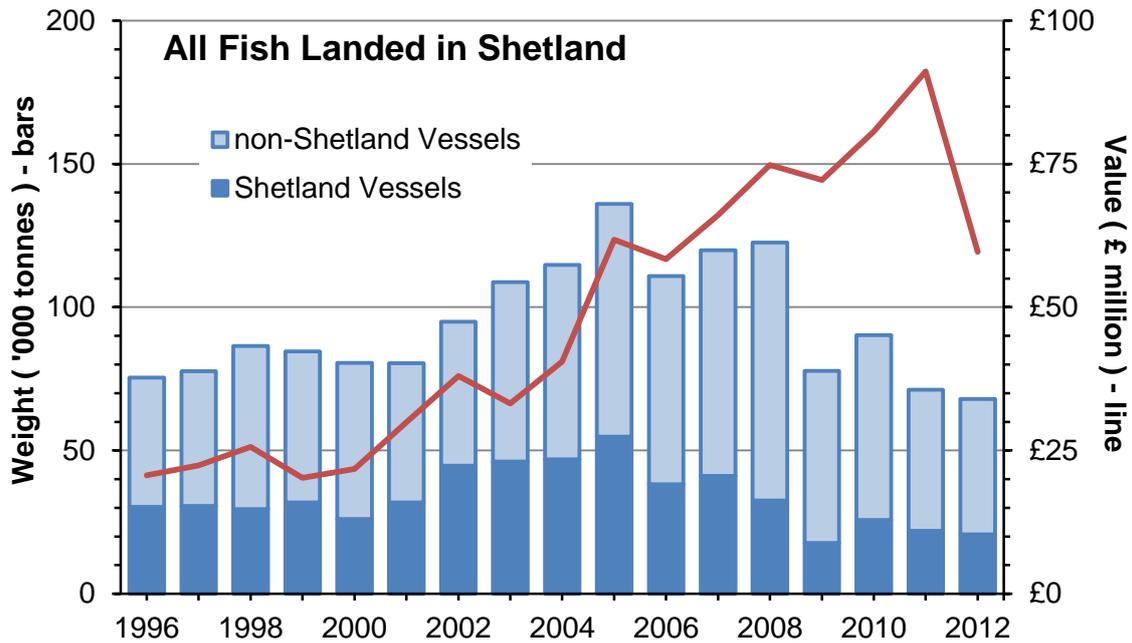


Figure 2 The weight (bars) and value (line) of all fish landed in Shetland from 1996 to 2012.

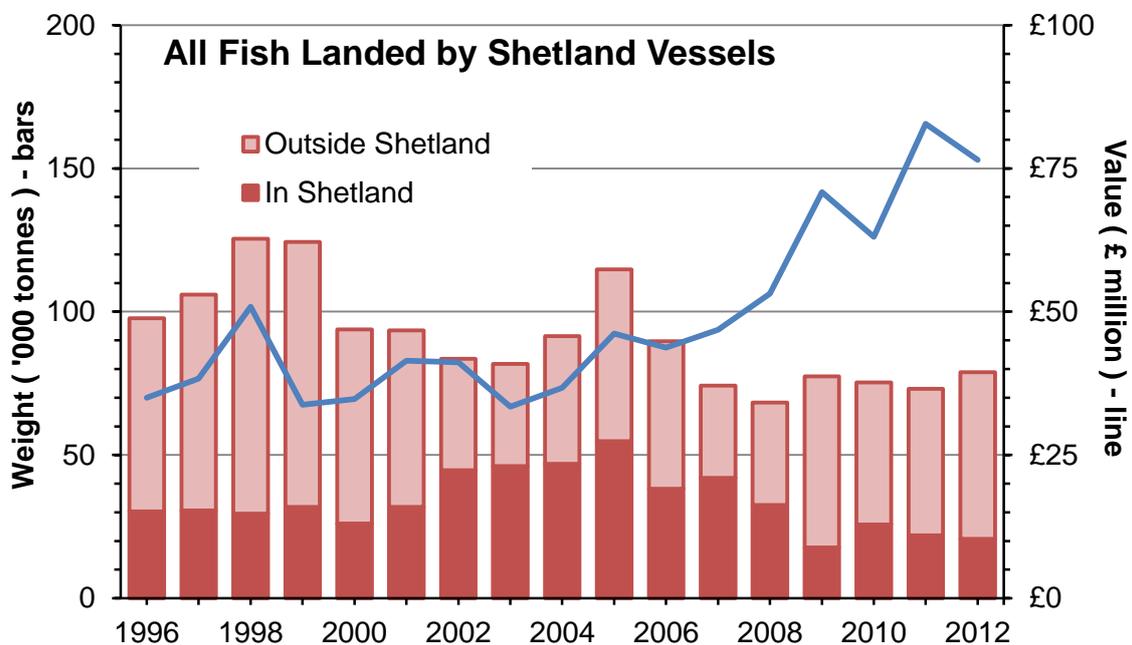


Figure 3 The weight (bars) and value (line) of all fish landed in Shetland from 1996 to 2012.

Fishing Landings in Shetland and by the Shetland Fleet – 2012

Pelagic species (mackerel, herring, etc.) accounted for most of the fish landed in Shetland (77% by weight, 57% by value), but had the smallest unit-value (Table 1). Whitefish (cod, haddock, monks, etc.) accounted for 21% of the weight of landings but 37% of their value. Shellfish (crabs, scallops, etc.) accounted for the smallest proportion of landings (3% by weight, 6% by value) but had the highest unit-value.

Table 1 The total weights and values of fish landed in Shetland in 2011 by species group.

	Weight		Value		Unit Value
	tonnes	%	£ m	%	£ / kg
Pelagic Fish	52,054	77%	£34.1	57%	£0.66
Whitefish	14,051	21%	£22.0	37%	£1.57
Shellfish	1,843	3%	£3.5	6%	£1.90
Total	67,948		£59.7		£0.88

National Context

In a national context, one quarter (24%) of all fish* landed in Scotland in 2012 and one fifth (19%) of all fish landed in the UK were landed in Shetland.

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

More fish* was landed in Shetland in 2012 than in all of England and Wales.

Shetland fishing vessels accounted for one quarter (26%) of all fish* landed by Scottish fishing vessels in 2012, and 17% of all landings by UK vessels.

* Excluding shellfish.

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 fishing vessels.

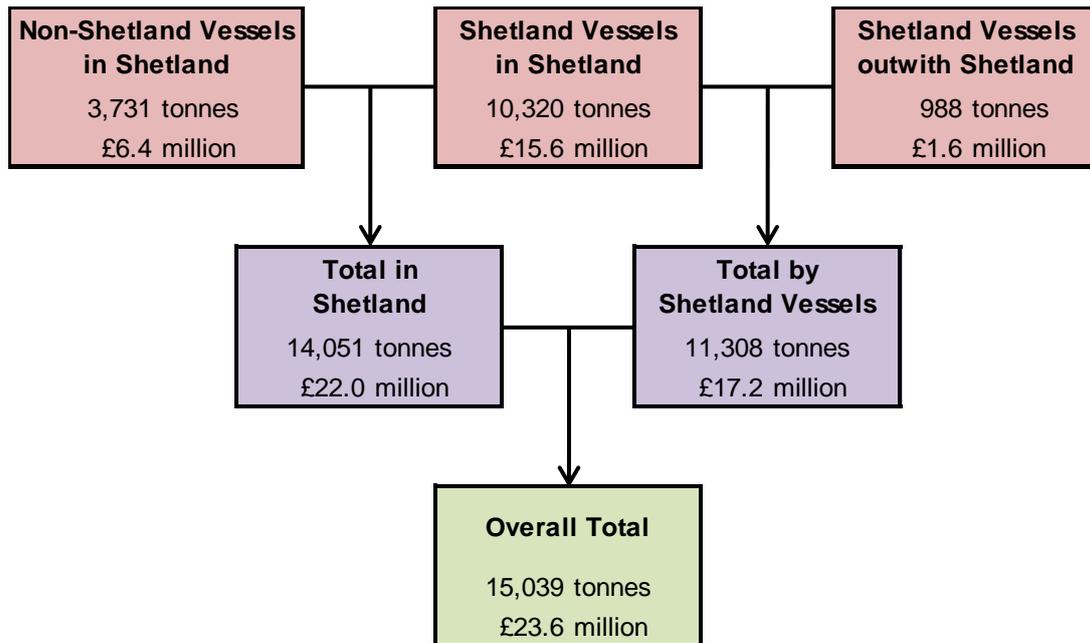


Figure 4 Summary breakdown of the weight and value of whitefish landed in Shetland and by Shetland vessels in 2012.

The Scottish Government data show that a total of just over 14,000 tonnes of whitefish worth about £22 million were landed in Shetland in 2012, three-quarters of this (73% by weight) by local fishing vessels (Figure 4). Shetland fishing vessels landed a total of just over 11,000 tonnes of whitefish almost £17 million, most of it (91% by weight) in Shetland.

The weight of whitefish landed in Shetland in 2012 was slightly (2%) greater than in 2011, although the value fell by 16% (Figure 5). This increase in the weight of landings follows several years of decline, it is believed as a result of tighter fisheries regulations (for example on 'days at sea').

The weight of landings in Shetland by Shetland vessels increased by 10% in 2012, while that by non-Shetland vessels fell by 16%.

Fishing Landings in Shetland and by the Shetland Fleet – 2012

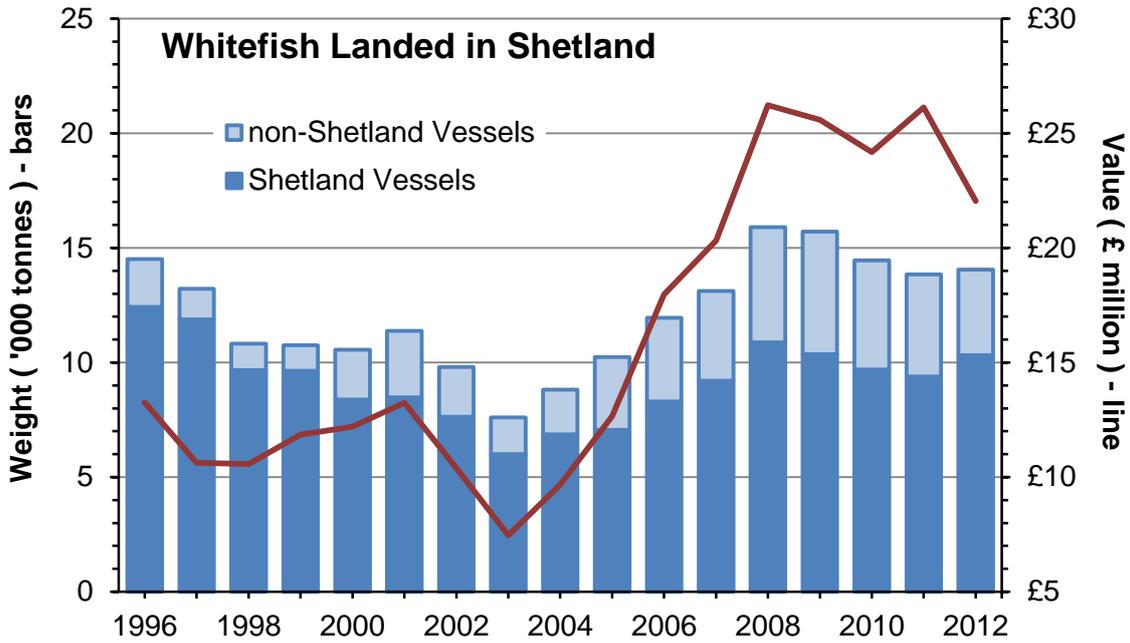


Figure 5 The weight (bars) and value (line) of whitefish landed in Shetland from 1996 to 2012.

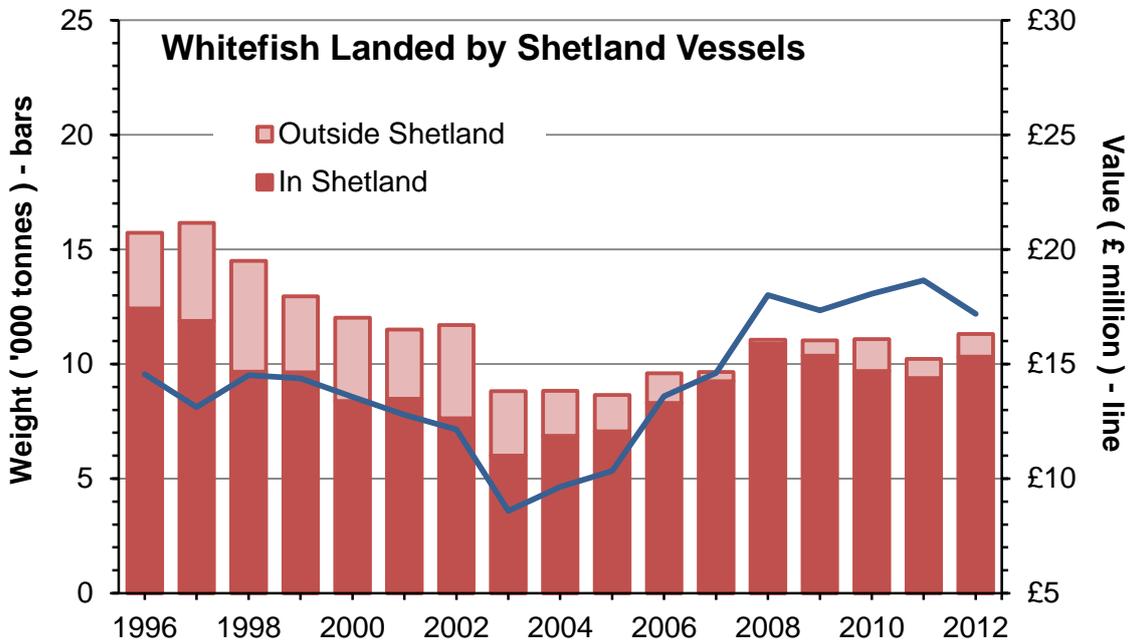


Figure 6 The weight (bars) and value (line) of whitefish landed by Shetland fishing vessels from 1996 to 2012.

Overall, the total weight of whitefish landed by Shetland fishing vessels increased by 11% in 2012 (Figure 6), although their value was 8% lower. The biggest increase (18%) was in landings outside Shetland. In recent years these 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.

It is estimated that sales through the local fish markets accounted for about 89% (by weight) of the whitefish landed in Shetland in 2012. 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 2012 are summarised in Table 2. Figure 7 and Figure 8 show the trends in the weights and value of landings in Shetland of the main whitefish species over the last decade.

Cod was the most valuable whitefish species landed in Shetland in 2012, accounting for 21% of the value of landings, although haddock was only just behind (at 20%). Monks – formally the most valuable whitefish species landed in Shetland - fell to third place (18% of the total value). The weight and value of monks landed in Shetland in 2012 were less than half those in 2009.

Table 2 The top-10 whitefish species (ranked by value) landed in Shetland in 2012.

	Weight (tonnes)	Value (£ m)
Cod	2,405	£4.62
Haddock	3,959	£4.42
Monks	1,245	£3.93
Whiting	2,157	£2.30
Megrim	698	£2.04
Saithe	1,584	£1.56
Ling	794	£1.05
Lemon Sole	102	£0.35
Hake	223	£0.31
Lythe (Pollack)	121	£0.26
Others	764	£1.21
Total	14,051	£22.04

Fishing Landings in Shetland and by the Shetland Fleet – 2012

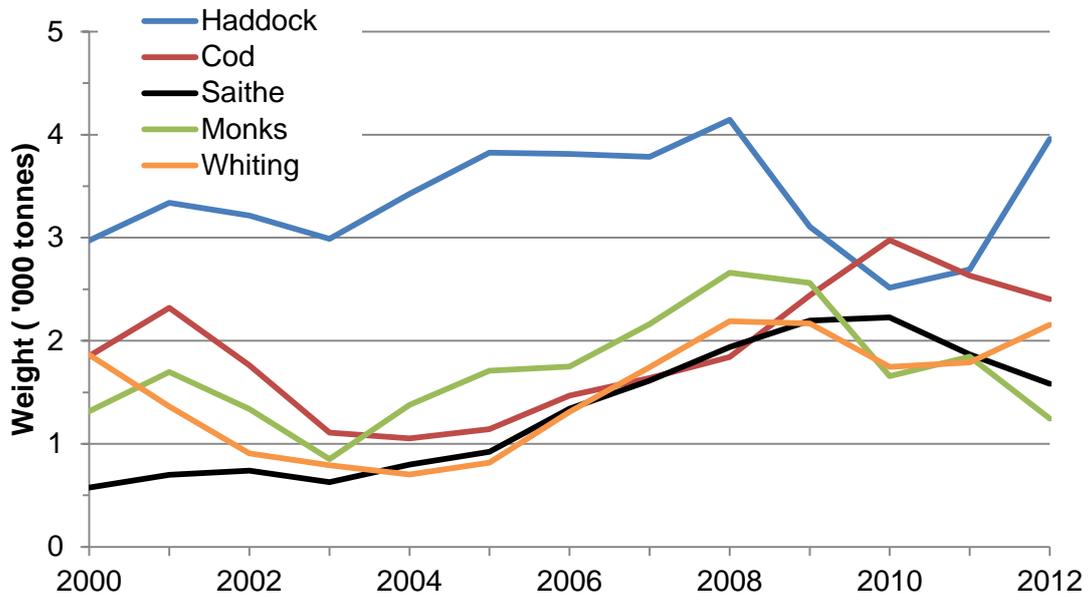


Figure 7 The weights of the principal whitefish species landed in Shetland from 2000 to 2012.

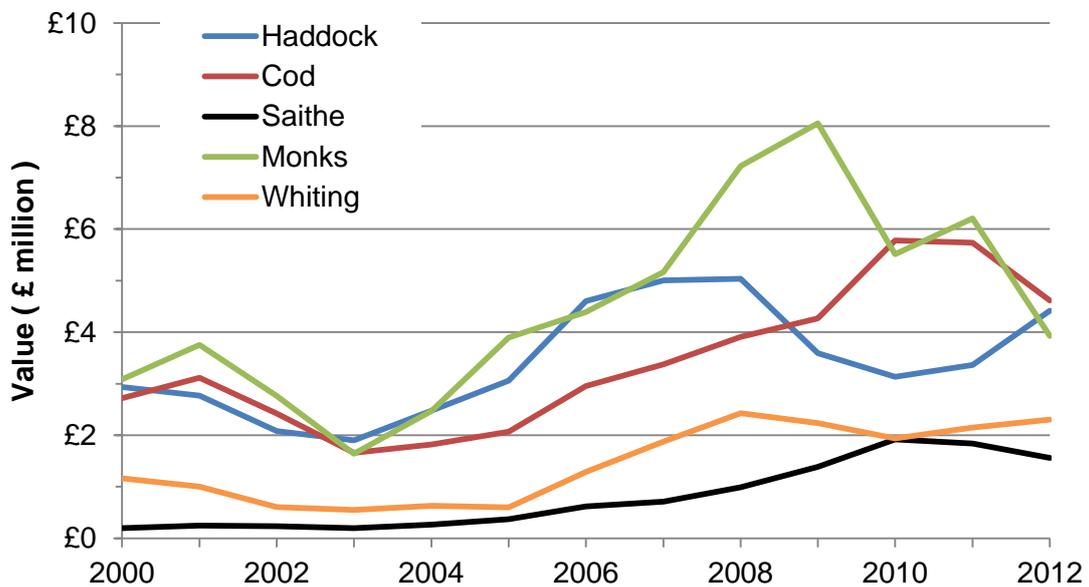


Figure 8 The values of the principal whitefish species landed in Shetland from 2000 to 2012.

Places of Whitefish Landing

The Scottish Government data indicate that two-thirds (68%) of the whitefish landed in Shetland in 2012 were landed in Lerwick, 21% in Scalloway, 9% in the North Isles (probably all in Cullivoe), and 2% elsewhere in Shetland (Figure 9). Landings increased in Lerwick (by 6%) and Scalloway (by 11%), but were down in the North Isles (by 20%).

The majority of landings of whitefish by non-Shetland vessels were made in Lerwick (80%), with the balance in Scalloway (14%) and Cullivoe (1%). Non-Shetland vessels accounted for 31% of whitefish landings in Lerwick, 18% of landings in Scalloway and only 4% in Cullivoe.

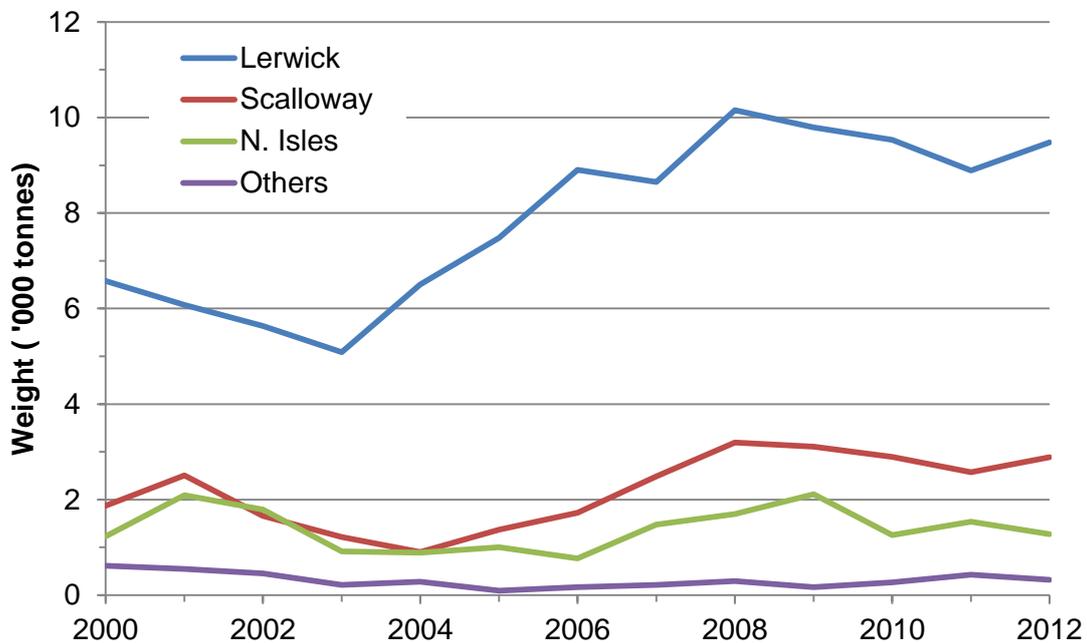


Figure 9 The weight of whitefish landed in Lerwick, Scalloway, the North Isles (primarily Cullivoe) and other Shetland ports from 2000 to 2012.

National Context

In a national context, 13% (by weight) of all the whitefish landed in the UK by UK fishing vessels in 2012 was landed in Shetland. More whitefish was landed in Lerwick than in any other port in the UK except Peterhead. Scalloway ranked 8th and Cullivoe 15th.

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.

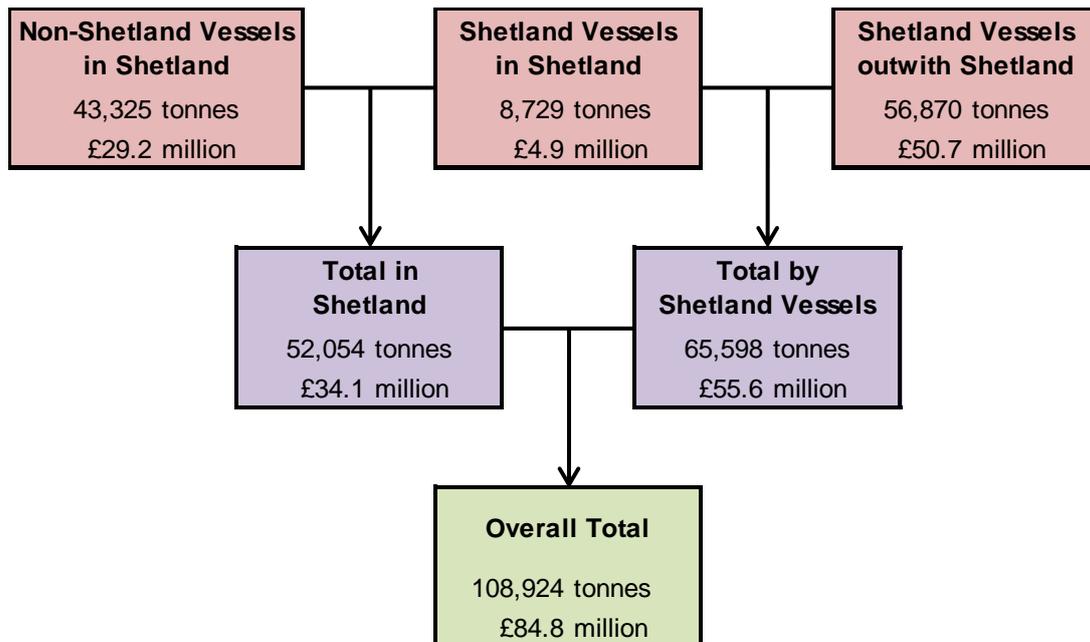


Figure 10 Summary breakdown of the weight and value of pelagic fish landed in Shetland and by Shetland vessels in 2012.

The Scottish Government data show that a total of about 52,000 tonnes of pelagic fish, worth about £34 million were landed in Shetland in 2012, 17% by local fishing vessels (Figure 10). 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 57,000 tonnes of pelagic fish worth £51 million, outside Shetland. Of this, the majority (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 75% of their weight and 86% of their value (£48 million). In addition to the main landings of mackerel at the Shetland Catch factory in Lerwick about 57 tonnes of handline caught mackerel, worth almost £1 million, was sold through the Shetland Seafood Auction in 2012.

Fishing Landings in Shetland and by the Shetland Fleet – 2012

The weight of pelagic fish landed in Shetland in 2012 was slightly (7%) lower than in 2011 (Figure 11), but the value was substantially (45%) lower. This decrease was primarily a result of a fall in the weight – and especially the value – of landings of mackerel (landings of herring increased by about 72%). This decline reflected global market conditions for mackerel in 2012 and was to some extent a reaction to the relatively high prices seen in 2010 and – especially – 2011.

Of the pelagic fish landed in Shetland by non-Shetland fishing vessels in 2012, just under half (48%) were landed by other Scottish vessels (Figure 12) and 19% by Norwegian vessels. Swedish, Danish and Northern Irish vessels accounted for smaller proportions.

Landings of pelagic fish by Shetland fishing vessels were slightly (7%) greater than in 2011 (Figure 13), although their value was somewhat lower (by 9%). Again this primarily reflected the changed global market conditions for mackerel.

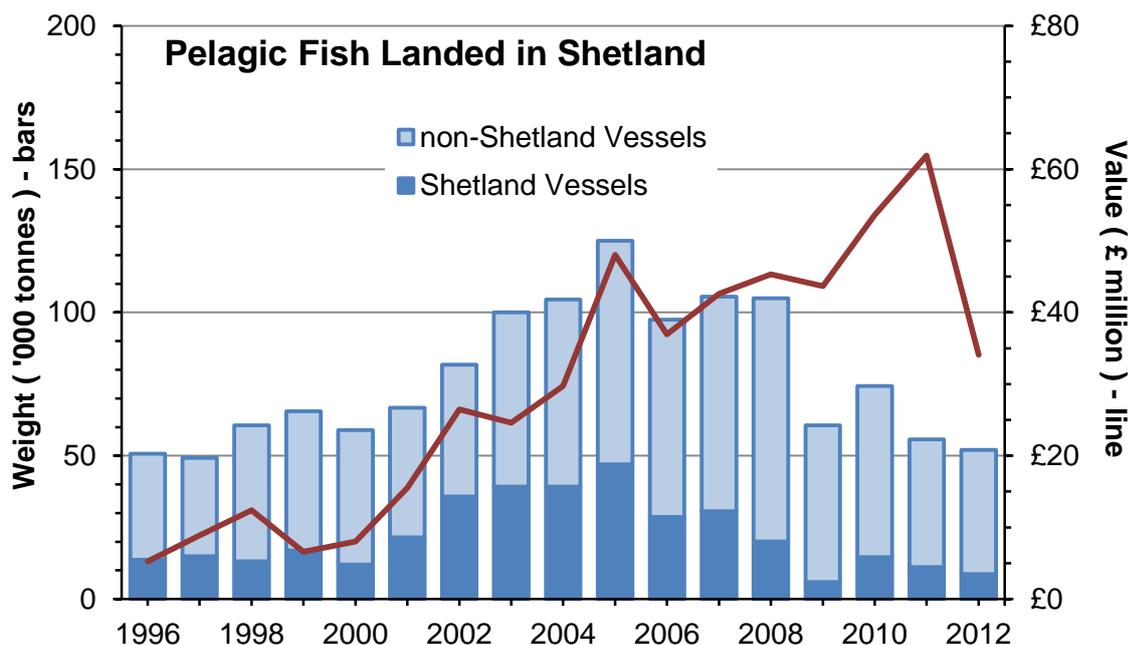


Figure 11 The weight (bars) and value (line) of pelagic fish landed in Shetland from 1996 to 2009.

Fishing Landings in Shetland and by the Shetland Fleet – 2012

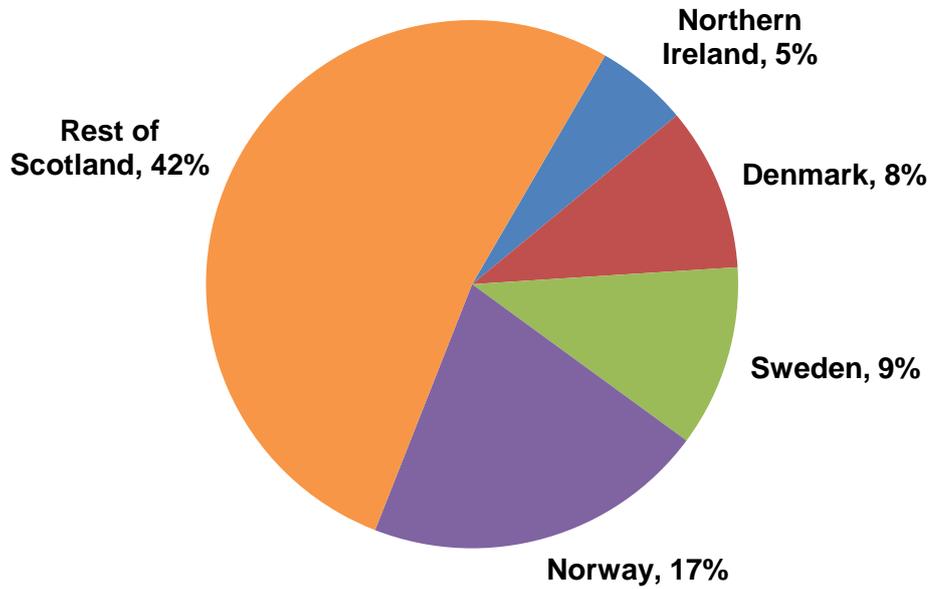


Figure 12 Breakdown of landings of pelagic fish in Shetland in 2012 by non-Shetland vessels.

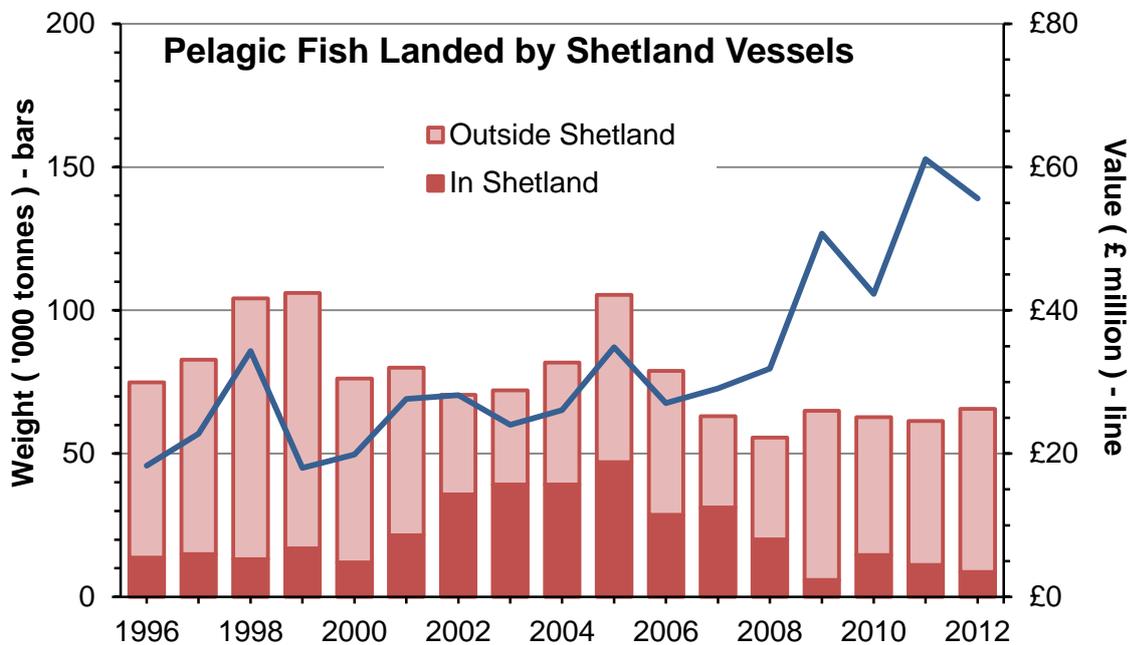


Figure 13 The weight (bars) and value (line) of pelagic fish landed by Shetland vessels from 1996 to 2009.

Shellfish

Shellfish includes lobsters, crabs (brown, green and velvet), scallops and buckies (whelks). Squid and nephrops, although technically shellfish, are included with whitefish (above) rather than the other shellfish. As many of the landings of shellfish 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.

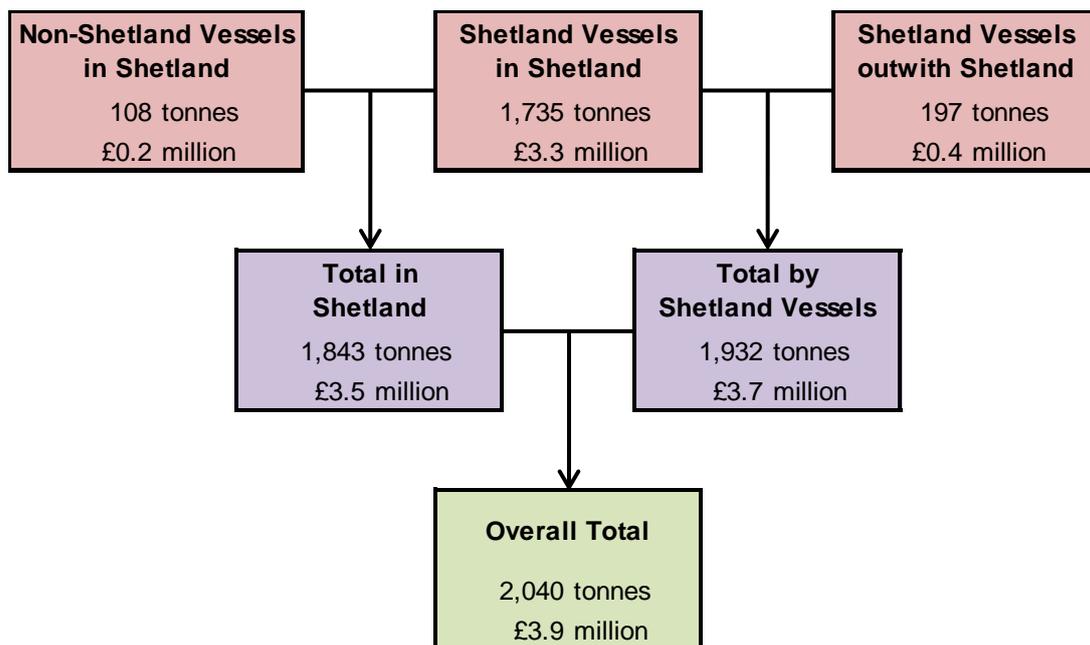


Figure 14 Summary breakdown of the weight and value of shellfish landed in Shetland and by Shetland vessels in 2012.

The Scottish Government show that a total of just over 1,800 tonnes of shellfish worth £3.5 million were landed in Shetland in 2012, most of it (94%) by Shetland registered fishing vessels (Figure 14). (Much of the balance may have been landed by vessels based in Shetland but not registered here). Only a very small quantity of shellfish were landed outside Shetland by local vessels.

The weight and value of shellfish landings in Shetland in 2012 were both higher than in 2011 (by 18% and 12% respectively) (Figure 15).

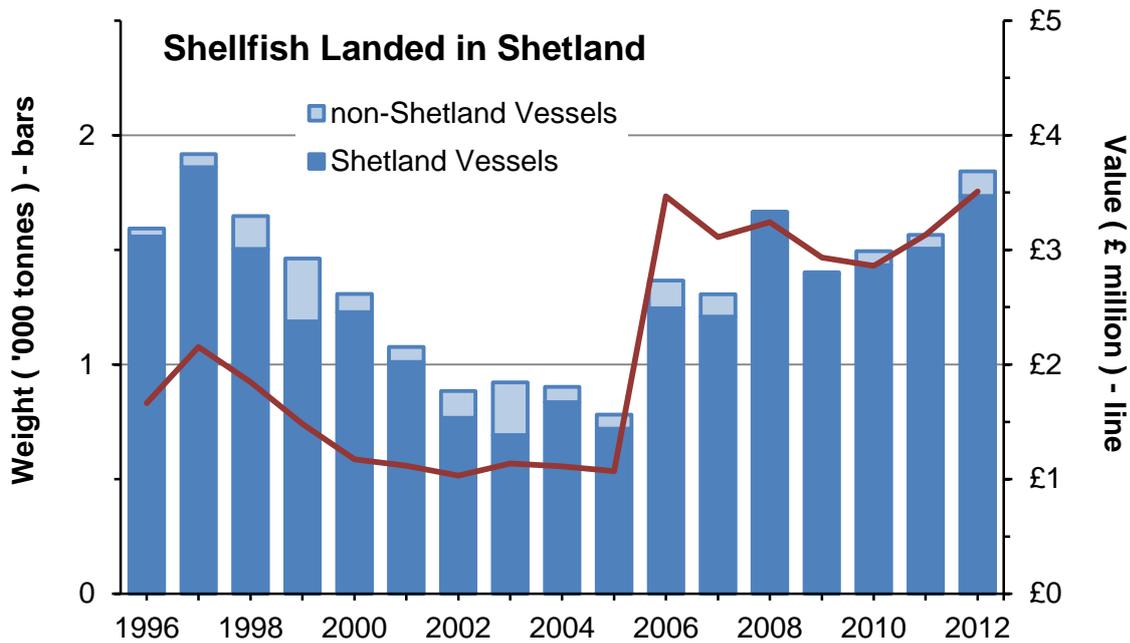


Figure 15 The weight (bars) and value (line) of shellfish landed in Shetland from 1996 to 2012.

Landings of shellfish were much more widely distributed around Shetland than was the case for landings of whitefish or pelagic fish. Less than one-third (29%) of the shellfish landings were recorded in Lerwick, and only 7% in Scalloway. One-fifth (20%) of landings were made in the Central Mainland (Toft, Voe, Sellaness, Vidlin, etc.) and 13% in the West Mainland (Walls, Aith, etc.). The North Isles accounted for only 7%.

Catches in the Waters Around Shetland

Figure 16 summarises the weight and value of landings of all fish caught in the waters around Shetland in 2012. These data are based on fishermen’s logsheets 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 16 totalled 168,000 tonnes in 2012, worth £149 million. A total of some 112,000 tonnes of fish, worth £91 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 16 The weight and value of landings in 2012 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 – 2012

On a per-area basis, the value of landings from the whole area shown in Figure 16 averaged about £6,600 per square nautical mile (NM) (£1,930 / km²), while for the smaller 'inner' area the average was about £11,200 / NM² (£3,300 / km²). However, there is substantial variation between areas, and within the squares shown in Figure 16, with some areas having much higher averages.

The weight of fish landed from the waters around Shetland increased by 14% from 2011 to 2012 (Figure 17), but their value fell substantially (by 30%). The weight of fish landed from the 'inner' area was 17% greater in 2012, but the value was 35% less.

These declines in value largely reflect the decline in the global market price of mackerel. The value of landings of all other species from the waters around Shetland in 2012 was only 2% less than in 2011, while the value of landings from the 'inner' area was 6% greater.

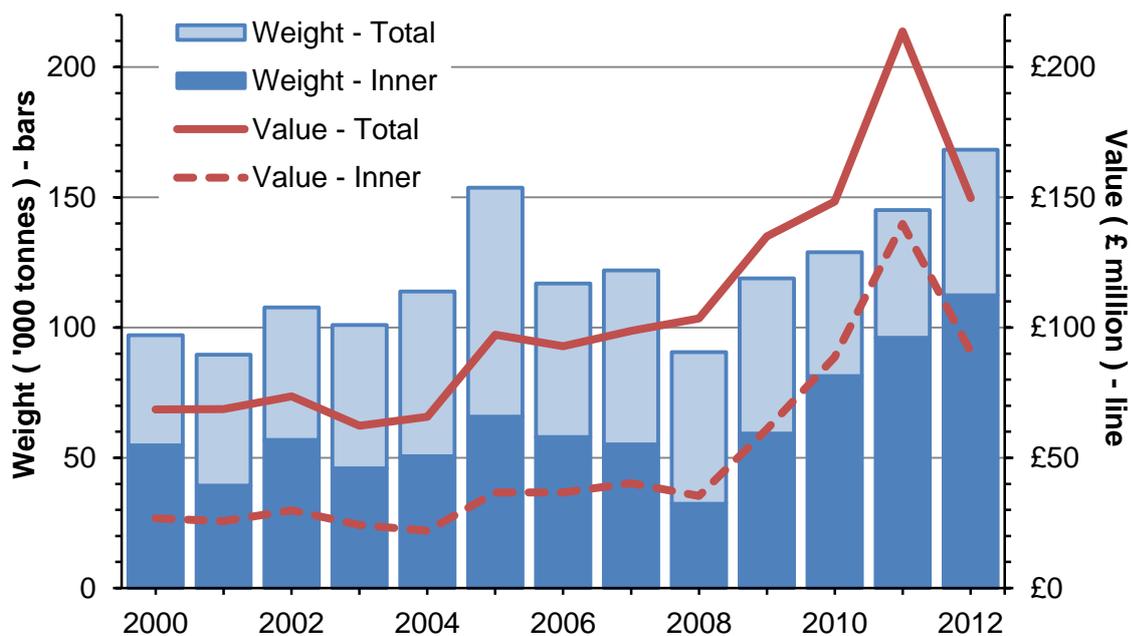


Figure 17 The weights (bars) and values (lines) of all fish landed from the area around Shetland shown in Figure 16, and from the smaller 'inner' area.

Outlook for 2013

Official figures for landings of fish in Shetland in 2012 will not be available until the latter part of 2013.

However, figures from the Shetland Seafood Auction Co. show that for the first 11 months of 2013 (Jan – Nov) the weight of whitefish sold through the local fish markets was 13% greater than in 2012, while the value was up by 17%. (It is estimated that about 89% of whitefish landed in Shetland is sold through the Shetland Seafood Auction.) The number of boxes of whitefish sold through the auction system in 2013 was by mid-November already greater than in any year since 2003 (the year the electronic auction was established).

Information from Shetland Catch Ltd. suggests that total landings of pelagic species are likely to have been higher in 2013 than in 2012, though not to the levels seen in 2011. Although landings of herring are expected to be lower this is likely to be outweighed by larger landings of mackerel.

Data on shellfish landings in 2013 are not available at this time.