

European Maritime and Fisheries Fund (EMFF)

United Kingdom

United Kingdom – overview

Coast, lakes and ports

- Coastline of 18 000 km, representing 10 % of the total EU-23 coastline.
- The top three British ports, by volume, are Peterhead, Shetland and Fraserburg.

Potential

The United Kingdom is the third fisheries producer in the EU, in volume and value. The total volume landed by the British fleet in 2013 was 618 000 tonnes of seafood, with a landed value of EUR 882 million. In the same year, the British fleet generated the highest net profit margin, with 23 % of revenue retained.

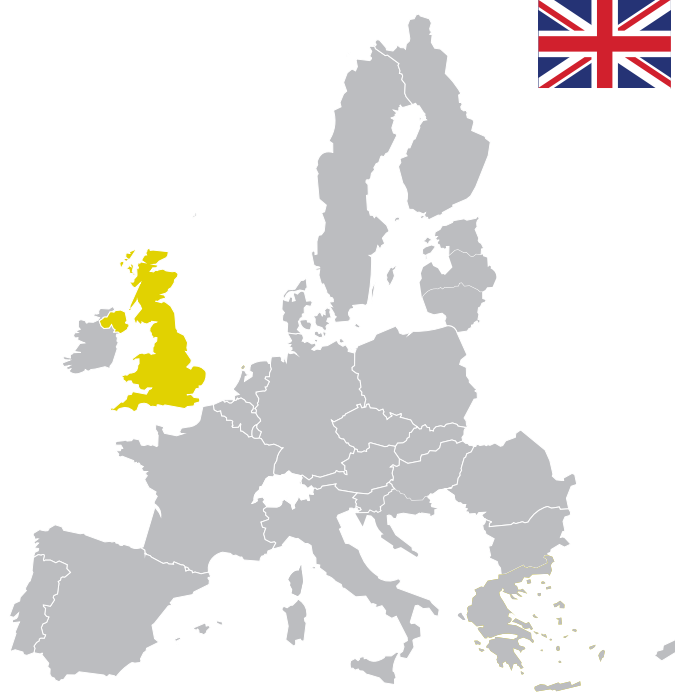
The British fleet is diversified, with a broad range of vessel types targeting different species, predominantly in the International Council for the Exploration of the Sea (ICES) areas II (Bering Sea), IV (North Sea), V and VI (West of Scotland) and VII (English Channel and Western Approaches).

The United Kingdom is the third largest aquaculture producer in the EU-28, with 14 % of the overall production by weight. In 2011, British aquaculture production accounted for over 199 000 tonnes, valued at EUR 740 million (AER2013). Salmon, trout and mussels total over 90 % by either volume or value. Salmon is the predominant production.

The British fish processing industry generates the highest income in the EU. There is a continued dominance of processing activity in the Humberside and North East Scotland (Grampian) areas, and rather modest levels of processing activity in more rural outlying areas such as Northern Ireland, Highlands and Islands and South West England.

Economic performance and employment

- The total amount of income generated by the British national fleet in 2013 was EUR 917 million: EUR 882 million in landings value and EUR 35 million in non-fishing income. In terms of economic performance, the total amounts of gross value added (GVA), gross profit and net profit generated by the British national fleet in 2013 were EUR 486 million, EUR 271 million and EUR 209 million, respectively. GVA, gross profit and net profit increased between 2012 and 2013, mainly driven by the performance of large pelagic vessels over 4 m. In 2013, the number of fishing enterprises in the British fleet totalled 5 501. Total employment in 2013 was estimated at 12 022 jobs, corresponding to 7 333 FTEs. Employment decreased



between 2008 and 2012, with the total number of employed persons falling by just 2 % and the number of FTEs by 14 %. The major factors causing the employment drop relate to the declining number of fishing vessels and a continued substitution of labour capital.

- Regarding the aquaculture sector, total income equalled EUR 992 million, with a GVA of EUR 485.1 million and net profit of EUR 64.8 million. There is an estimated number of 3 249 enterprises (mostly small and medium-sized enterprises (SMEs)). Total employment in the same year was estimated at 18 640 jobs or 10 581 FTEs, with an average wage of EUR 23 700.
- The combined turnover of the 375 processing companies was approximately EUR 5 billion in 2012, down 1 % (in nominal terms) compared to 2011, but 23 % higher than in 2008 (there was a peak in 2010). The GVA of the industry stood at around EUR 1.7 billion in 2012. Processing companies in the United Kingdom employed a total of 17.9 thousand FTEs in the same year, while the mean nominal wage in the industry was EUR 34 200.

United Kingdom's Operational Programme









Budget

Total (EU + national):
€309 993 982

EU contribution:
€243 139 437
(co-funding of 78.43 %)

The Operational Programme (OP) covers the six 'Union Priorities' defined in the EMFF, namely:

1.  promoting environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based **fisheries**;
2.  fostering environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based **aquaculture**;
3.  implementation of the **Common Fisheries Policy (CFP)**;
4.  increasing **employment and territorial cohesion**;
5.  fostering **marketing and processing**;
6.  implementation of the **Integrated Maritime Policy (IMP)**.



1. Fisheries

What?

Marine fisheries in the United Kingdom face some challenges in terms of sustainability, at both biological and economic level. Some segments like pelagic, scallop and creelers are profitable, while others, such as beam trawlers, have a low economic performance value. CFP reform and improved management approaches will help to stabilise stocks and enhance sustainability. There is a need to ensure a balance is maintained between fishing capacity and available opportunities. The United Kingdom's Fleet Action Plan for 2014 sets out a range of measures, such as gear selectivity, total allowable catch (TAC) and quotas, which will be focused on those segments of the fleet where the Fleet Capacity Report has identified a potential disparity between catching capacity and available stocks.

Main species landed

The top species landed in 2013 were:

- mackerel, which generated the highest landed value (EUR 184 million),
- Norway lobster (EUR 103 million),
- scallops (EUR 62 million),
- cod (EUR 53 million),
- haddock (EUR 53 million),
- monkfish/angler (EUR 48 million).

In 2013, the British fishing fleet consisted of 6 428 registered vessels, with a combined gross tonnage of 201 000 GT, a total engine power of 806 MW and an average age of 27 years. The size of the British fishing fleet decreased between 2008 and 2013, with the number of vessels falling by 6 %, and gross tonnage and kilowatts decreasing 5 % and 6 %, respectively.

The British fleet is diversified, with a broad range of vessel types (29 fleet segments) targeting different species predominantly in ICES areas II (Bering Sea), IV (North Sea), V and VI (West of Scotland) and VII (English Channel and Western Approaches).

OP aim

The focus of the Union Priority (UP) 1 is to support adaptation to CFP reform. The United Kingdom aims to reduce unwanted catches by 12 %. This will be achieved by supporting innovative approaches to conservation measures via pilot projects to limit bycatch, cooperation to support multiannual plans and Marine Protected Areas via network building and cooperatives, funding of innovative and highly selective gear and supporting investments in landing sites and ports to deal with the discard ban.

The United Kingdom attaches great importance to environmental aspects, and will support the restoration of the environment through waste and marine litter remediation projects. There will also be a focus on management and implementation of the protected sites introduced to support the aims of the Habitats Directive (92/43/EEC). Projects will enhance the protection of freshwater and migratory fish, increasing stock levels and compliance with the Water Framework Directive (2000/60/EC), Habitats Directive and Eels Regulation (EC) No 1100/2007).

The United Kingdom anticipates a EUR 893 000 increase in net profit by helping boost the business potential and competitiveness of SMEs, including offering advice on access to credit, and building resilience or reducing barriers for new entrants through funding a vessel that is part of a balanced fleet segment.

The United Kingdom aims to increase energy efficiency of fish capture through funding for fishermen to purchase more energy-efficient equipment.

Some 280 jobs will be maintained by offering training opportunities and supporting the preservation of key skills during transitional phases. Training opportunities and networking, in particular, will target adaption to the requirements of the landing obligation.

Key result

A sustainable and innovative fishing sector.

Budget

€67 487 315

2. Aquaculture



What?

The United Kingdom holds a good position on the market (it is the third largest EU producer), with Scotland holding a dominating position within the United Kingdom. Salmon farming, already being very advanced, can afford to finance further development, whereas the shellfish sector faces more challenges. Scotland has an innovative and well established shellfish sector however other parts of the United Kingdom are lagging behind. Clear growth targets for 2020, have been established for the mussel production industry in Wales. However, smaller companies have a lack of investment capacity, especially for loan capital. Aquaculture is currently limited to remaining near shore sites, while aquaculture in more exposed sea areas is not yet proven, still requiring further research and development and investment capacity.

Scotland is currently the largest producer of farmed Atlantic salmon in the EU and the third largest globally — in 2011, 158 018 tonnes were produced with an estimated value of GBP 584.7 million at farm gate prices. Salmon production in Scotland is governed by five large companies, which are serviced by many smaller entities. It is based in remote, rural communities providing valuable jobs and income in areas which have few other employment opportunities.

Regional aquaculture production by weight is as follows: Scotland (81 %), England (6 %), Wales (6 %) and Northern Ireland (6 %).

In 2010 in England, there were 67 authorised areas for shellfish farming and 278 for finfish farming. The main species with growth potential are rainbow trout and mussels, as well as Pacific oysters.

In Northern Ireland in 2010, total aquaculture production was 12 236 tonnes with a value of EUR 12.383 million. The largest sector is the bottom grown mussels sector, which accounts for 88 % of volume produced and 50 % of the value.

No data are available for Wales.

The multiannual national strategic plan for aquaculture in the United Kingdom (2015) defines the main issues/challenges for aquaculture for the United Kingdom in the coming years.

- Administrative and regulatory compliance presents a challenge to aquaculture growth, particularly in respect of SMEs.
- Marine planning is needed to help open up commercially viable new productive areas for aquaculture: the United Kingdom is actively incorporating aquaculture production areas within national marine plans, with the aim of recognising aquaculture sites. Due to the nature of devolution in the United Kingdom, marine plans in each administration are at various stages of development.
- There is a need to increasing competitiveness and foster innovation.

OP aim

The strategy for the UP2 is focused on supporting innovation to help expand production (e.g. via research into co-location with other marine use sites such as wind farms) while improving the environmental impact of the sector (e.g. research into alternative feedstuffs/managing sea lice). Funding will also support greater profitability in the sector through improvements in predator control, the potential of new species being cultured, opening up of new aquaculture locations and diversification in income through complementary activities. The United Kingdom expects an increase in both value and volume of production in aquaculture by 2020 (7 900 000 target for value and 3 100 000 target for production).

Key objective

To expand the aquaculture sector across the United Kingdom and foster its sustainable growth.

Budget
€19 327 305



3. Common Fisheries Policy (CFP)



What?

There is a strong tradition of delivering high-quality fisheries science and data collection in the United Kingdom. Data collection will be adapted to respond to the new requirements of the reformed CFP. It remains necessary to ensure full implementation and enforcement of the Control Regulation and other control measures.

OP aim

The United Kingdom will address the weaknesses identified by:

- Developing IT tools and technologies to support control and enforcement. Existing IT systems must be upgraded and/or replaced to ensure that all required data may be collected, processed, stored and transmitted in an accurate and timely manner.
- Implementing the Remote Electronic Monitoring (REM) of fishing operations in support of the Landing Obligation. This is intended to provide good coverage of the main high-risk fleet sectors and provide assurance of compliance by the British fleet.
- Improving traceability of fisheries products, particularly in relation to the small-scale fleet, will require development, rollout and training in the use of technological solutions.
- Training and development of inspection staff.
- Implementing specific control and inspection programmes (SCIPs) and operations conducted under Article 15 of Regulation 768/2005.

British data collection will be directed towards meeting obligations set out in the existing Data Collection Framework, including collection of biological data on fish stocks, data on fishing activity (capacity, effort, catches and landings) and social and economic data for marine fisheries, aquaculture and the processing industries.

Key result

EMFF funding will support the implementation of the control, inspection and enforcement system as required by the CFP, as well as the collection, management and use of data required by the CFP.

Budget
€97 633 875



4. Community-led local development strategies



What?

British fisheries areas are important in terms of infrastructure, support services and the workforce for the (sustainable) catching sector. The 2014-to-2020 budget allocated by the United Kingdom for this priority is relatively low (6 % of the total) and the Fisheries Local Action Groups (FLAGs) will have to seek funding from other sources. FLAGs will be encouraged to work closely with the LEADER Groups under the European Agricultural Fund for Rural Development (EAFRD) as well as the delivery bodies responsible for the European Regional Development Fund (ERDF) and the European Social Fund (ESF).

OP aim

To support investment in training, maintaining and developing skills, capacity building, improved local marketing and supply chain logistics, diversification and improved access to match funding. Funding will be provided to FLAGs that support projects addressing the needs of coastal communities. Support will also be available to FLAGs wishing to take forward interterritorial or transboundary projects.

EMFF funding will help increase employment and territorial cohesion in fisheries-dependent areas. By 2023, The United Kingdom foresees 55 jobs and 22 new businesses being created.

Key result

Help the growth of fisheries and aquaculture-dependent communities to diversify their economies and bring added value to their fishing activities.

Budget
€13 583 840

5. Marketing and processing



What?

It is estimated that in 2012 there were 375 British companies with most of their income from fish processing, with a marked variety in processor size, range of activities and other business characteristics such as location and processed species. The number of processors in 2012 decreased by 5 % compared to 2011 (down by 20 from 395), and by 28 % compared to 2008 (down by 144 from 519).

OP aim

The Producer Organisations (POs) will be supported in playing a greater role in production and marketing. Support will be made available for Production and Marketing Plans (PMPs) that seek to contain measures related to unwanted catches, certification schemes, traceability projects, etc. EMFF funding will also be available to improve marketing expertise focused on market research to identify opportunities for new products and enhancement of product presentation and packaging. It will also support the creation of POs within the aquaculture and inshore sectors, to help resolve its fragmented nature.

Funding will also be dedicated to projects that reduce energy consumption and for technical innovation in environmental footprint reduction, which will benefit the efficiency of the business and its environmental impact. Technical innovations in processing technology would also meet the need for creating opportunities to utilise unwanted catches (by-catch and unfamiliar species), that will be landed under the landing obligation, so they can be placed on the appropriate market.

Key result

The processing sector will be modernised, and its economic performance and sustainability will be supported through investments in the development of new or improved products.

Budget

€27 243 978

6. Integrated Maritime Policy (IMP)



What?

The United Kingdom is one of leading countries in implementation of the Marine Strategy Framework Directive (MSFD) (2008/56/EC), and is developing its policy of marine spatial planning. Knowledge gaps remain in our understanding of the marine environment and marine ecosystem processes. There is also a lack of monitoring for some key elements of the marine environment.

OP aim

For UP6, British funding will help improve our understanding of the marine environment, and develop plans that have sufficient local specificity and data. Funding will also support increased research, monitoring and evidence gathering, to address knowledge gaps in marine planning. Funding will support the MSFD, and will be used to establish baselines and monitoring so as to tackle more complex issues such as cumulative impacts and future analysis, and filling knowledge gaps such as community composition of phytoplankton and zooplankton and sensitivity to climate variability.

Key results

Putting in place effective MSFD measures and an effective, open and transparent and inclusive marine planning process to ensure sustainable development of the marine environment.

Budget

€5 334 672

(The rest of €12 528 452 has been allocated under 'Technical Assistance of the OP')

Success stories

Getting young people into commercial sea fishing. FLAG: Cornwall and Isles of Scilly, Newlyn, Cornwall

Training courses from Cornwall show how FLAGs can support skills acquisition and restore the attractiveness of the sector to young professionals. Subsequently, 19 young unemployed people have found work in fishing and fishing-related sectors.

[More information](#)

Mussel and oyster production/processing/multi trophic aquaculture site funded by the EFF and the FIGF

EFF funded project to develop an innovative, reliable and coordinated approach to sustainable best practice aquaculture. Various species are farmed alongside one another to create a balanced ecosystem that benefits each species and the wider environment.

[More information](#)

Plymouth Fisheries showcased its ice production facility, completed as part of a GBP 1.2 million project to support the region's vital fishing industry, to some of the organisations which helped to secure funding for the scheme.

[More information](#)

More information

• [European Commission Fisheries](#)

• [European Maritime and Fisheries Fund](#)

• [Marine Management Organisation](#)

• [Aquaculture multiannual national plan](#)