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Review of the Trial Mackerel Inshore Fishery 2014-2017

Consultation

November 2017

marinescotland

Introduction

In 2014, the Scottish Government launched a trial of expanded mackerel fisheries in Scotland's inshore waters. Its intention was; to provide more opportunities for inshore fishermen to expand and diversify; to encourage new entrants; to examine the potential for more low impact fisheries and; to widen the benefits from quota to local communities around the coast. The four year (2014-2017) trial is almost complete and the Scottish Government is considering the impacts of the trial and seeking views on the future of the inshore mackerel fishery. Consultation questions are contained within the document and listed in Annex 1. Information about how to respond to the consultation is contained in Annex 2.

In each of the past four years 10 metre and under (10mu) vessels in the non-sector have had access to approximately 1,000 tonnes of North Sea mackerel and 300 tonnes of West of Scotland mackerel, for which Scottish Government has managed access and monitored uptake of the stocks. Key features of the arrangement have been open access to the fisheries for all 10mu non-sector licences and the return of unutilised quota to the Scottish sector via Producer Organisations.

A decision on the future of this fishery will be taken early in 2018 following the close of the consultation.

Background

In 2000, 300 tonnes of North Sea mackerel was ring-fenced from the UK allocation for fishing by Scottish 10mu vessels in the northern North Sea (sea area IVa), north of the latitude on which Peterhead sits, and including the waters around Orkney and Shetland.

In 2007, in response to growing participation in the fishery, 2 distinct 'pools' of quota were created; dividing the 300 tonnes between the 'Moray Firth' and 'Shetland'. In 2008, further measures were introduced to ensure that the summer mackerel season was not closed early, as had occurred in 2006 and 2007. Following consultation with those with an interest, Handline Mackerel Entitlements were created for 223 licences for fishing in area IVa. Only holders of entitlements were thereafter permitted access to the area IVa fishery.

In 2012, area IVb Handline Mackerel Entitlements were created for 103 licences and 'dual' IVab entitlements for created for 35 other licences, where they had a track record of fishing in both sea areas.
Access to the western mackerel fishery has never been restricted.

Quota to cover fishing in IVb was acquired through swaps with Producer Organisations rather than through allocations. Simultaneously, a small number of unused mackerel entitlements were extinguished where the owner had not landed mackerel in any of the preceding three years.

In 2013, there was a consultation on the amount of mackerel quota that could be allocated for inshore fishing. This consultation also considered whether the mackerel entitlements should be abolished so as to provide open access to the fishery.

As a result of the consultation, in 2014 the allocation for the NS stock was increased up to a maximum of 1,000 tonnes (of which 300 tonnes could be accessed in IVb). The allocation for the western mackerel stocks was increased by 300 tonnes.
NS mackerel is currently allocated to four management pools as follows: Moray Firth, IVb, Orkney and Shetland.
At the same time, the handline mackerel entitlements in area IV were made defunct and access was opened to all holders of Scottish, non-sector, 10mu licences.

Review of trial fishery

Over the past four years, the Scottish Government has managed the fishery to facilitate economic benefits from the fishery for local communities and ensure that it is open for 12 weeks or longer over the summer months.

Anticipated benefits and issues

A wide range of stakeholders responded to the 2013 consultation about the expanded inshore mackerel fishery. In general the expanded inshore mackerel fishery was considered to offer potential opportunities to increase existing fishing activities and establish the fishery in new areas, increase employment in fishing and related onshore activities, provide access to the fishery for new entrants and provide wider economic benefits to coastal communities. Some stakeholders had concerns about potential negative impacts of the fishery such as markets being flooded by the additional fish resulting in lower prices for the mackerel.

Diversification, increased employment and participation

Stakeholders considered that the expanded mackerel fishery could offer diversification opportunities for small scale fishermen who otherwise fish for non-quota species such as crab and lobster. It was felt that an increased opportunity for mackerel could have the potential to take pressure off these non-quota species and provide an additional source of revenue. In Orkney, for example, there were expectations that much greater numbers of fishermen could participate in the fishery.

Expansion of opportunities and markets

Improved marketing opportunities and better prices due to the higher volumes of fish were predicted by some stakeholders who felt that the higher volumes would help to establish markets. In the areas where there was no established fishery such as the West of Scotland, it was hoped that the increased opportunities would support the development of a high-value, small scale fishery and the development of onshore processing activity and employment opportunities. Whilst in in Shetland it was considered that an increase in fish would improve markets and prices for line caught mackerel.

New entrants

It was acknowledged that the trial fishery, at least in the short run, would be continue to pursued by existing fishermen. It was felt nonetheless that unrestricted access to the fishery (and the additional quota) would help to reduce barriers to entry and encourage new entrants as it is a relatively low cost way into the fishery for new skippers.

Constraints and opposition

Some notes of caution were sounded about the availability of markets for the fish, remoteness from major fishing ports, onshore facilities and processing factories, and the high cost of specialised transport making it unviable to send fish to processing factories in the north east or elsewhere.

In addition, the availability of fish in particular locations fluctuates from year to year as areas of Scotland have more natural abundance than others.

Some were concerned that the expansion of the fishery, through new vessels, might lead to overcapacity in the inshore fleet and damage the markets and prices, with fears that the market could collapse due to oversupply. It was considered that inshore fishermen may then have to accept lower prices for the fish due to the increase in quota.

Reputational damage to Scottish mackerel was considered to be a risk due to poorly handled fish and lack of vessel and onshore facilities such as on-board chilling equipment.

Evaluation of trial period

Impact of trial

The impacts of the trial fishery have been evaluated with reference to the landings, mackerel prices, number of vessels participating, annual reviews of the fishery, and on-going feedback from fishermen, Fishermen's Associations and Fishery Offices. Data from the trial period was compared with 2013, the year before the trial. 2017 data has not been included in the analysis as this is not available at this time. As well as data from the whole of Scotland, individual quota allocation areas were examined. Annex 3 contains data on landings, numbers of vessels participating, value of landings and prices.

Variations in the data reflect geographic variation in stock abundance from year to year and the duration and timing of the mackerel season which may influence vessel participation. Landings and vessel participation varies from area to area due to local circumstances such as availability of buyers, markets, processors and transport and infrastructure, etc.

Overall, the Scottish Government considers that the trial fishery has been a success. The additional quota has provided economic benefits to coastal fishing communities across Scotland and in many areas increased participation in the fishery. In light of this, the Scottish Government proposes to continue access to the fishery for under 10 metre vessels in the non-sector for the foreseeable future.

1. Do you agree that the mackerel allocations for 10mu non-sector pool fishery should continue?

Landings and uptake

Between 2013 and 2017 there was a substantial increase in landings in the Moray Firth, Orkney and Shetland. In the West of Scotland there was a small increase in landings between 2013 and 2016 but the uptake remains low at around 5-6%. IVb landings between 2013 and 2016 fluctuated over the period ending up lower in 2016 than 2013.

There has been effective utilisation of the quota allocation in the North Sea fishery whilst in the West of Scotland it has been somewhat different. The uptake of quota is low with no sign that this situation will change. For this reason the Scottish Government proposes that the additional quota allocation to the West of Scotland is reduced to 50 tonnes.

2. Do you agree that the current allocation (1000 tonnes) for the North Sea stock is the right amount?

3. Do you agree that the additional allocation (300 tonnes) for the western stock should be reduced to 50 tonnes?

Economic benefits

In general the increased allocation of mackerel has benefited most areas involved in the fishery; through increased numbers of vessels participating in the fishery, or through economic benefits, particularly in areas of high quota uptake in the communities of North East Scotland, Orkney and Shetland.

Even in areas such as the West of Scotland where there has been relatively low uptake and vessel participation, there have been economic benefits. The value of landings there in 2016 was over double what it was in 2013.

The North Sea area, in particular saw considerable economic benefits. In Shetland, for example, the annual value of landings rose from £94,368 in 2013 before the trial to £247,884 in 2016. Similarly Orkney saw a rise from £4,462 to £21,739 in the same period and in the Moray Firth area the value of landings rose from £229,667 to £431,496.

4. Do you agree with the arrangements for the current quota allocation pools for the NS mackerel stock? i.e. managing pots of quota discreetly by ports of administration?

5. Do you think that the allocation shares between these pools should change?

Vessel participation and new entrants

Vessel participation fluctuates in all areas with numbers of vessels at a peak in 2015 in IVb, Moray Firth and Orkney and at a peak in Shetland and West of Scotland in 2014. The Moray Firth, Orkney and Shetland show an overall increase in participating vessels between 2013 and 2016.

We are aware that physical and natural constraints have an impact on participation. These range from simply the tides and weather, to accessible processing facilities, markets and the cost of the transport of the landed fish. In the West of Scotland it was anticipated that some fishermen might diversity from shellfish but there has been no significant evidence of this happening. There has been some evidence from skippers that the mackerel doesn’t come as close to shore any longer and therefore it’s tougher to target.

Prices paid for handline mackerel

Average prices have fluctuated between 2013 and 2016. In the North Sea, prices are higher for mackerel (both handline and trawl) than in the West of Scotland.
A premium of up to 20% was paid for line caught mackerel over the price of trawled mackerel.

Markets and processing

Shetland and Peterhead, in particular, have been able to make good use of the additional quota due to well established onshore and transport infrastructure and the natural abundance of mackerel in the area.

Unutilised quota

A key feature of the management of the fishery has been an arrangement whereby quota which is unutilised by the inshore non-sector to vessels is transferred to pelagic sector. In total, 984 tonnes of NS mackerel has been reallocated to the pelagic sector since the trial began. This amount has reduced in each year of the trial.

Mackerel entitlements

The increased allocation for the four-year period of the fishery has provided open access for all 10mu, non-sector licence holders. However, there are 320 or so handline mackerel entitlements for the North Sea fishery, which are currently defunct but still associated with licences. In line with the Government's proposals to continue the mackerel allocation, it is also proposed that all handline mackerel entitlements are extinguished and removed from licences.

The success of the trial means that the mackerel entitlements are no longer relevant to the management of the fishery. This is further emphasised by the current pelagic landings obligation which makes restrictive licensing redundant too.

6. Do you agree with the Scottish Government's proposal to establish handline mackerel as a fishery open to all 10mu licences and therefore remove all handline mackerel entitlements from licences?

Over 10m non sector access to the fishery

The Scottish Government considers that the inshore mackerel fishery should continue to provide opportunities to small vessels in the under 10 metre non sector only. However, some have suggested that access should be broadened to over 10 metre vessels in the non-sector. Therefore the Government would be interested to hear in more detail about the potential for widening access to the fishery.

7. Should all non sector vessels (under and over 10m in length) have access to the inshore mackerel fishery?

8. Do you have any other comments or suggestions about the future management of the fishery?

Responding to this Consultation

We are inviting responses to this consultation by **13 December 2017.** Please respond to this consultation using the Scottish Government's consultation platform, Citizen Space. You can view and respond to this consultation online at https://consult.scotland.gov.uk/marine-scotland/inshore-mackerel-fishery-trial You can save and return to your responses while the consultation is still open. Please ensure that your consultation response is submitted before the closing date of **13 December 2017.**

If you are unable to respond online, please complete the Respondent Information Form (see below) and send it with your response to:

Ross Parker
Access to Sea Fisheries Team
Marine Scotland
Area 1B – South
Victoria Quay
Edinburgh
EH6 6QQ

Handling your response

If you respond using Citizen Space https://consult.scotland.gov.uk/marine-scotland/inshore-mackerel-fishery-trial you will be directed to the Respondent Information Form. Please indicate how you wish your response to be handled and, in particular, whether you are happy for your response to published.

If you are unable to respond via Citizen Space, please complete and return the Respondent Information Form in Annex 1of this document. If you ask for your response not to be published, we will regard it as confidential, and we will treat it accordingly. All respondents should be aware that the Scottish Government is subject to the provisions of the Freedom of Information (Scotland) Act 2002 and would therefore have to consider any request made to it under the Act for information relating to responses made to this consultation exercise.

Next steps in the process

Where respondents have given permission for their response to be made public, and after we have checked that they contain no potentially defamatory material, responses will be made available to the public at https://consult.scotland.gov.uk. If you use Citizen Space to respond, you will receive a copy of your response via email. Following the closing date, all responses will be analysed and considered along with any other available evidence to help us. Responses will be published where we have been given permission to do so.

Comments and complaints

If you have any comments about how this consultation exercise has been conducted, please send them to Ross.Parker@gov.scot.

Scottish Government consultation process

Consultation is an essential part of the policy-making process. It gives us the opportunity to consider your opinion and expertise on a proposed area of work. You can find all our consultations online at https://consult.scotland.gov.uk. Each consultation details the issues under consideration, as well as a way for you to give us your views, either online, by email or by post.

Consultations may involve seeking views in a number of different ways, such as public meetings, focus groups, or other online methods such as Dialogue. (https://www.ideas.gov.scot)
Responses will be analysed and used as part of the decision making process, along with a range of other available information and evidence. We will publish a report of this analysis for every consultation. Depending on the nature of the consultation exercise the responses received may:

- indicate the need for policy development or review
- inform the development of a particular policy
- help decisions to be made between alternative policy proposals
- be used to finalise legislation before it is implemented

While details of particular circumstances described in a response to a consultation exercise may usefully inform the policy process, consultation exercises cannot address individual concerns and comments, which should be directed to the relevant public body.

Annex 1 Consultation questions

1. Do you agree that the mackerel allocation for 10mu non-sector pool fishery should continue?

2. Do you agree that the current allocation for the North Sea stock is the right amount?

3. Do you agree that the additional allocation for the western stock should be reduced to 50 tonnes?

4. Do you agree with the arrangements for the current quota allocation pools for the NS mackerel stock? i.e. managing pots of quota discreetly by ports of administration?

5. Do you think that the allocation between these pools should change?

6. Do you agree with the Scottish Government's proposal to establish handline mackerel as a fishery open to all licences and therefore remove all handline mackerel entitlements from licences?

7. Should all non sector vessels have access to the inshore mackerel fishery?

8. Do you have any other comments or suggestions about the future management of the fishery?

Annex 2 Respondent information form

Please Note this form **must** be completed and returned with your response.

Are you responding as an individual or an organisation?

☐ Individual
☐ Organisation

Full name or organisation's name

Phone number

Address

Postcode

Email

Information for organisations:

The option 'Publish response only (without name)' is available for individual respondents only. If this option is selected, the organisation name will still be published.

If you choose the option 'Do not publish response', your organisation name may still be listed as having responded to the consultation in, for example, the analysis report.

The Scottish Government would like your permission to publish your consultation response. Please indicate your publishing preference:

☐ Publish response with name
☐ Publish response only (without name)
☐ Do not publish response

We will share your response internally with other Scottish Government policy teams who may be addressing the issues you discuss. They may wish to contact you again in the future, but we require your permission to do so. Are you content for the Scottish Government to contact you again in relation to this consultation exercise?

☐ Yes
☐ No

Annex 3 Background data

North Sea	2013	2014	2015	2016
Number of Vessels	264	329	363	329
Landings (tonnes)	459	399	733	765
Landings value	£431,140	£457,506	£649,899	£808,589
£ per tonne under 10m	£939	£1,146	£887	£1,057
£ per tonne Scottish pelagic trawl	£1,006	£653	£630	£1,055

West Coast	2013	2014	2015	2016
Number of vessels	11	24	12	8
Landings (tonnes)	6	18	25	15
Landings value	£4,582	£17,566	£19,014	£11,442
£ per tonne	£764	£952	£761	£789
£ per tonne Scottish pelagic trawl	£889	£999	£683	£744

Area	Landings (tonnes)			
	2013	**2014**	**2015**	**2016**
IVb	120	101	146	115
Moray Firth	222	63	450	350
Orkney	7	41	37	36
Shetland	110	194	117	264
WS	6	18	15	15
Grand Total	**465**	**418**	**765**	**779**

Area	Number of vessels			
	2013	**2014**	**2015**	**2016**
IVb	72	95	101	65
Moray Firth	161	141	186	191
Orkney	12	31	33	27
Shetland	49	72	68	76
WS	11	25	12	8
Grand Total	**305**	**364**	**400**	**367**

Area	Landings Value			
	2013	**2014**	**2015**	**2016**
IVb	£102,642	£151,232	£107,632	£107,470
Moray Firth	£229,667	£84,057	£438,309	£431,496
Orkney	£4,462	£25,353	£17,259	£21,739
Shetland	£94,368	£196,864	£86,699	£247,884
WS	£4,582	£17,566	£9,014	£11,442
Grand Total	**£435,721**	**£475,072**	**£658,913**	**£820,031**

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