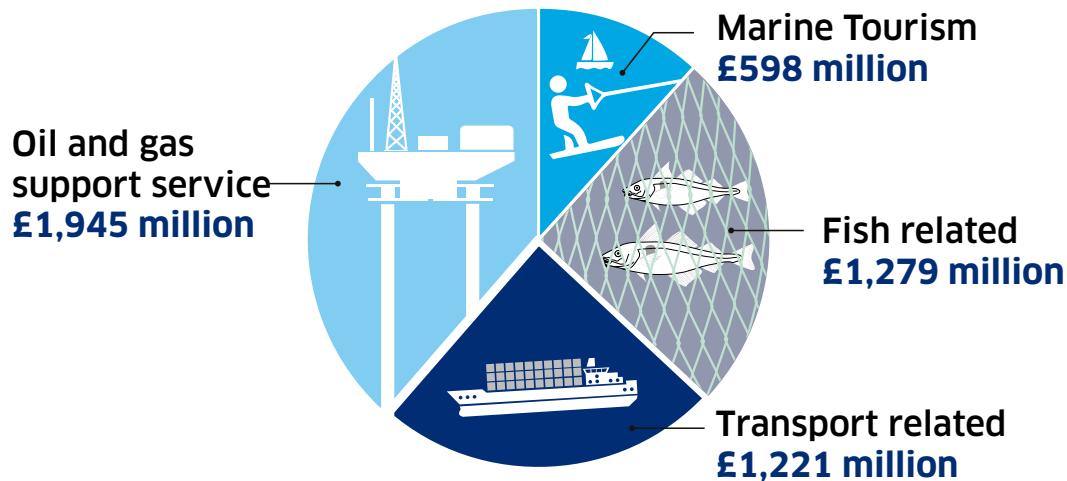


Scotland's marine economy



GVA of Scotland's Marine Economy by Activity Group 2019

Background

Scotland's marine economy - defined as sectors depending on the marine environment for their output - provides an important source of income and employment across Scotland. In 2019, Scotland's marine economy (excluding oil and gas extraction) generated £5 bn in GVA and employed 75,500 people, accounting for 3.4% of total Scottish GVA and 2.8% of total Scottish employment.

Gross Value Added (GVA) is a measure of the economic value generated by an industry or business. It is defined as the difference between output produced and the cost of producing that output (excluding labour costs).

Scotland's marine economy can be split into four broad activity groups:

- Fish-related activities
- Transport-related activities
- Marine recreation and tourism
- Oil and gas services

Sectors such as marine renewable energy and research and development (R&D) also contribute to the Scottish economy, although comprehensive data covering these are currently limited.



Fish-related activity

Fishing, aquaculture and fish processing together generated **£1.3 billion in GVA** and **employed around 14,100 people in 2019**. This accounted for **0.9% of total Scottish GVA** and **0.5% of total employment**. The fish catching, farming and processing sector helps to support jobs in fragile coastal and rural parts of Scotland.

	Fishing	Aquaculture	Fish Processing
GVA (£m)	329	560	390
Employment (000's)	4.9	2.4	6.8
GVA per Worker (£)	67,257	232,842	57,368

	Ship building and maintenance	Construction & water transport services (inc rent/lease equip)	Passenger water transport	Freight water transport
GVA (£m)	408	450	133	229
Employment (000's)	6.3	4.50	1.4	0.4
GVA per Worker (£)	64,825	100,044	95,071	572,250

Transport activity

Marine transport activities generated **£1.2 billion in GVA** and **employed around 12,600 people in 2019**. This activity group includes the construction of water projects such as waterways and marinas, water transport service activities including the operation of ports, and the leasing of water transport equipment. Not only do marine transport activities make an important direct contribution to the Scottish economy, they provide the infrastructure that supports other sectors indirectly.

Marine tourism

Marine tourism and recreation contributed **£598 million in GVA** to the Scottish economy and **employed 33,100 people in 2019**. Marine and coastal tourism is an important growth sector for Scotland, accounting for around **13% of the total GVA of all tourism**. Tourism is an important employer in Scotland's rural areas.

	Marine Tourism
GVA (£m)	598
Employment (000's)	33.1
GVA per worker (£)	18,076

Oil and gas support services

Oil and gas support services, including exploration services and test drilling, generated £1.9 bn in GVA and employed 15,700 people in 2019.

Oil & Gas Services

GVA (£m)	1,945
Employment (000's)	15.7
GVA per Worker (£)	123,885

For more information on Scotland's marine economy and marine environment see **National Marine Plan interactive (NMPi)**.

 www.gov.scot/nmpi

Notes

- Marine Scotland, Seafish and the aquaculture economic survey (previously data collection framework survey) data is used for fishing and aquaculture sectors. All other sectoral data presented are derived from the Scottish Annual Business Statistics publication.
- Employment figures are head-counts, and not expressed as full-time equivalent (FTEs).
- Some sector level figures will not reconcile precisely with estimates from other sources. These slight discrepancies are a result of differing methodological approaches.
- Marine tourism and recreation here covers all tourism businesses located in postcodes within 100 metres of the coastline. Further details are provided in the supporting methodology notes in Scotland's Marine Economic Statistics 2019. <https://www.gov.scot/collections/marine-economic-statistics/>
- Oil and gas extraction is also a key component of the Scottish economy, although estimates are not presented here to remain consistent with UK extra regio (offshore) activity in National Accounts Statistics.