North West Regional Study

Seafish Report No.440

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Sea Fish Industry Authority

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Summary

The fisheries of the North West of England, though centred historically on Fleetwood include numerous landing places between the Scottish and Welsh borders. The disappearance of the Icelandic fishery for cod, haddock and plaice has shifted the emphasis from deep sea trawling to a range of fishing methods prosecuted within the Irish Sea.

This fishery is predominately by an ageing fleet of trawlers below 18m (60 feet) in length. These vessels are significantly affected by weather and in recent years by drastically reduced fishing opportunities through reduced quota allocations. Too many vessels have been chasing a diminishing stock in the North Irish Sea.

Many Fleetwood based boats land regularly at Holyhead. Meanwhile a large fleet of Belgian trawlers lands regularly at Liverpool for transhipment to Continental markets. Fleetwood's infrastructure suffers from a lack of investment allied to greatly reduced dock income. Despite these problems there is still a strong market for fish there with 90% of the demand from merchants met from other places.

The small scale molluscan shellfish and shrimp fisheries sustain considerable local employment in Morecambe Bay and the Dee Estuary in particular. Their present problems are related to meeting EC fish hygiene regulations whilst remaining viable.

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1. Introduction

The latest in a series of regional studies of the fish business covers the catching, landing and sales of fish as well as coastal processing in the area from the Scottish border in the Solway Firth to the English shore of the Dee Estuary (Hoylake), *(see Fig. 1)*.

The fishery is a multi species one and diverse in terms of methods employed. Although the Irish Sea is virtually an inland sea in international terms it is not an exclusive UK fishery as are the Minches. The North Irish Sea fishery is shared with Irish, French and Belgian fleets some of whom have traditional rights to fish up to six miles from the shoreline *(see Fig. 2)*.

The result of the considerable effort concentrated in a relatively small area has been overfishing and consequent drastic reduction in TACs and quotas.

The middle water fleet formerly based in Fleetwood has virtually disappeared and effort by local and visiting fleets is effectively limited to the North Irish Sea.

In addition to the cod, plaice, whiting and sole fisheries there is a considerable nephrops fishery mainly based in Northern Ireland and a seasonal herring fishery. The latter is of little interest to boats based within the NW region however.

Local processing of white fish is concentrated in Fleetwood with shellfish processing there and in Whitehaven. The main base of local boats is Fleetwood where the major services are available.

2. The Fleet

Major change took place during the 1970's and into the 80's in the composition of the fleet.

The closure of the Icelandic fishery meant the disappearance of the company fleets of deep sea trawlers based in Fleetwood. There was some local investment in large coastal fishery vessels by former deep sea skippers but owning to lack of capital with one exception this was limited to a few second-hand boats in the 60 to 80 foot ranges. The exception was the conversion of a former middle water trawler into a purse seiner/trawler. However, the vessel, though based in Fleetwood rarely visits the port mainly operating out of the North of Scotland.

There has been some investment in the 10 to 12 metre length class of small trawlers and latterly in mini beamers. Several larger beam trawlers are based in Fleetwood but only occasionally land there.

The other vessels in the regional fleet consist mainly of older 50 to 60 foot nephrops and white fish trawlers based in Fleetwood, Whitehaven and Maryport. The nephrops boats mainly operate out of Whitehaven, a port with close business connections with Kilkeel in Ulster and formerly a seasonal landing place for the Isle of Man herring fishery now dominated by Northern Ireland boats. Another major fishery in the area is that for scallops, both king and queen scallops. The main centre for landings is, however, Kirkcudbright on the Scottish coast though a firm in Fleetwood does buy considerable quantities.

Gillnetting and anchor seining are other fishing methods employed out of Fleetwood, Whitehaven and Maryport.

The Solway brown shrimp fishery attracts half a dozen boats to work out of Silloth the most northerly port and the Morecambe Bay fishery for shrimp is an important local cottage industry. Various gears, some involving tractors rather than boats operate as far south as Lytham.

Cockle fisheries are prosecuted in the Solway, Morecambe Bay and the Dee Estuary.

Cumbria Sea Fisheries Committee records a fleet of 54 "full time" boats. Thirteen of these are under 10m length. In addition there are 59 boats working part time, all under 10m length. 120 men work the full time boats and 73 with the part timers.

This fleet represents the Northern part of the study area, from the Scottish border to Haverigg Point which lies West of Barrow and the Duddon Estuary.

The fleet from Haverigg Point to the Welsh border is dominated by boats based on Fleetwood with the remainder being small inshore shellfish boats mainly of less than 10m length *(Table 11)*.

A feature of the North West fleet is the high number of old boats, 90% are more than 20 years old. Though a high average age is typical of a predominantly nephrops fleet, the prospects for the long term are problematical when replacement costs are taken into consideration.

3. Fish Stocks Landing and Quotas

The North Irish Sea offers good seasonal stocks of plaice, sole, whiting and cod. Nephrops although of small average size are found predominantly West and South of the Isle of Man as well as close to South Cumbria.

Until the 1980's Fleetwood fishermen regularly sailed past these stocks on their way to the prolific Icelandic fishery. Scots and Irish fished the herring and the cod seasonally utilising mainly Whitehaven. Local inshore fishers exploited the shrimp stocks.

Seasonally the Dutch and Belgians descended on the Liverpool Bay to Morecambe Bay area to take plaice and sole, thus establishing a useful "track record". The port of Fleetwood if not the local fishermen or merchants, benefited from income derived from dues levied on these beam trawlers.

North Irish Sea demersal stocks have come under increasing pressure from increasingly efficient Irish boats fishing for cod and boats from the Low Countries fishing sole and plaice. UK quotas for NW vessels for West of Scotland and Rockall have been shared between the Fleetwood PO and the Grimsby based FPO. There has been a reduction in landings at Fleetwood by Marr's vessels and these boats now land on the East coast or the Continent, Fleetwood now receives very little fish from area VI. This is apparent from a reference to *Figures 3 to 8.*

UK cod and plaice quotas for Area VIIA the Irish Sea, have decreased from 6500 tonnes to 2710 tonnes and from 3050 tonnes to 1395 tonnes respectively during the period 1989 to 1994. Whiting quotas are down by 65%. The recommended TAC for nephrops reduced by 23% during that four year period *(see Tables 12 and 13).* The sole quota has fluctuated after a 60% drop to 1993. It has been increased by 47% this year.

The Cumbrian Sea Fisheries Committee were recently told that the value of 1993 fish and nephrops quotas within the Irish Sea was sufficient to allow some 100 boats to make a modest profit. There are more than 100 boats in the port of Kilkeel alone. After a 1982 report, Seafish were severely criticised by Northern Ireland fishermen's organisations for suggesting that the local fleet there might be some 40% over capacity.

A study of comparative quota allocations for the most recent years 1993 and 1994 for the Irish Sea shows a further big reduction of 34% for cod. In Area VI, West of Scotland there were some improved quotas in 1993 over 1992. Haddock was up by 42% and whiting 16% although anglers were down by 11%. However 1994 quotas show haddock down by 11%, whiting by 21% and cod by 8%. Anglers are increased by 11%.

4. The Infrastructure

4.1 Fleetwood

As mentioned previously Fleetwood has historically been the centre of the regional fishing industry. However, the present situation is very different from that pertaining in Fleetwood's heyday.

Provisional figures for 1992 landings estimate a total tonnage of about 3000 tonnes valued at about £3m. *(Tables 9 and 10 and Figure Nos. 3 to 8).*

Supplies of cod and haddock from Iceland no longer arrive and indeed those from the West of Scotland have virtually dried up. Beam trawling, formerly the exclusive preserve of Dutch and Belgian fishermen has now been developed on a large scale by UK fishermen particularly from Newlyn, Brixham and Lowestoft. Meanwhile the second generation of Dutch and Belgian beamers, highly efficient vessels of up to 3000 shp each have arrived on the scene. The predominant North Irish Sea fishery is now for plaice and some sole. The dominant market is in Holland and Belgium with a smaller market in Brixham. Lowestoft is almost exclusively supplied from the North Sea. The vessels prosecuting this fishery in the Irish Sea move as quotas are fished out, to the Channel and to the North Sea seasonally. Their markets are distant in most cases from their landing places and their harbour requirements for transhipment are mainly relatively conveniently situated deepwater berthage with easy tidal access and close to the motorway system. The Mersey and to a lesser extent Holyhead can provide these facilities at the expense of Fleetwood.

Some 80 different vessels mainly large beam trawlers used the Canada Dock in Liverpool during 1992. Official landing figures for Liverpool for 1992/1993 season show about 700 tonnes landed valued at about £3m, which was predominately sole. The majority of landings are from Belgian vessels but include some UK beam trawler landings. Holyhead has developed with improved berthage and services but is not so popular as a lay-by port for larger vessels because of the considerable tidal range, experienced alongside. It is however used by Fleetwood vessels for overlanding to Fleetwood markets. Liverpool's Canada Dock is accessible via the lock system around the clock. Ice is trucked to Liverpool as required although many of these vessels have their own ice making facilities.

The drastic decline in landings of white fish at Fleetwood and hence harbour revenues after 1980 caused Associated British Ports, the landlords to drastically curtail expenditure thereafter. Although the market halls were then relatively new, virtually no expenditure was made on these thereafter.

Services geared to handling considerable demand for ice boxes, repairs etc gradually shrunk and in many cases went out of business.

The Fleetwood infrastructure rapidly became quite inappropriate to the requirements of an inshore fleet. To compound the difficulties the main management companies, Bostons and Marrs pulled out. The situation became very difficult in 1986 with the industry backed fish landing company in financial difficulty so much so that Lancashire Enterprises Limited, a Council financed development company stepped in to purchase a controlling interest. Some efforts to restore a bulk supply of fish, mainly haddock, to Fleetwood from West of Scotland and Rockall grounds provided some temporary improvement but latterly Rockall was heavily fished by boats denied catches in the North Sea and quotas were slashed. In any case amounts from the few local boats able to go to Rockall were relatively small and irregular. There were landings by the occasional larger Marr owned trawlers during the 1980's but again never on a regular basis.

Attempts were made to bring in Icelandic ships, while these were supported by local merchant interests, local fishermen were often deliberately obstructive, seeing these landings as direct competition to their own market. Lancashire Enterprises pulled out of the fish dock company in 1988 selling their shares to fishing and private interests.

Fleetwood meanwhile has been developing to meet the leisure market with the completion of a marina in the outer dock basin and work continues on associated residential and shopping development on the dock estate. The fishing industry is now concentrated around the inner dock basin. Facilities are rundown. The market hall quayside doors have been out of use for years, the slipways currently under repair are inefficient and, probably as a consequence, relatively expensive. Fishermen complain of the inability to readily access freshwater supplies. The single modern facility and a key to perhaps Fleetwood's continuity in line with its processing capacity, is a new ice plant set up by Fylde Ice to replace their ageing block ice plant in 1990.

Associated British Ports adopt a strictly commercial approach and towards the present fishery related income situation are unwilling to invest. They are managing a fund set up to accept a levy paid by fish merchants to pay for upgrading part of the South market to meet EC fish hygiene rules. ABP's derogation expired on the 31st December 1993, and they are awaiting MAFF grant approval at the time of writing. The works will consist of closing a section of the South Market by the erection of brick walls across the existing market hall and the fitting of new doors in some existing quayside doorways with the bricking up of some others. Various complaints have been raised by fishermen about the silting up of the Wyre dock approach channel. ABP admit that there is inadequate depth for vessels generally in excess of 80 feet (x 25m), but state that they are unwilling to spend an estimated £150,000 without a guarantee of a return in terms of extra revenue. It is known that engineering work particularly involving use of the slipway has been lost due to the uncertain access to the dock. A related problem is the rundown of the vessel service industry locally which again militates against increased use of the fish dock.

The fish dock activities of market management and auction sales are now carried out by a private company Wyre Fish Dock Management (WFDM) on behalf of ABP. There is no doubt that this company has improved the collection of dues, wharfage etc over the previous industry controlled arrangements but the industry are unhappy in having only a 19% shareholding in the company. 19% is held by Wyre Borough Council who set up the company originally and 62% by the Chief Executive. Mr Davies.

There is still some £200,000 lying in an account which is the property of the old industry led landing company which is presently moribund. Fishermen would like their

25% share released to fund purchase of further shares in WFDM but other shareholders want the total money to be released for "mutual benefit".

Clearly, with declining local catches, attributed locally to the activities of beam trawlers, limited investment and the probability that at least 25% of the fleet would request a decommissioning arrangement, the local scene can only be seen as a holding operation on behalf of a smaller locally based fleet. Nevertheless a recent report highlighted the surprisingly large quantity of fish handled by local processors estimated at about 30, 000 tonnes only 10% of which is landed over the quayside. It does, however, indicate the importance of the fish market though it may be perhaps better regarded as a regional wholesale operation rather than a coastal fish market. The question must also be asked as whether some of the fish landed at Liverpool could not be trucked to Fleetwood to be sold on that auction.

4.2 Whitehaven

The tidal harbour of Whitehaven about 80 miles by road North West of Fleetwood has been developed as a fish landing mainly because of it proximity to the Isle of Man herring fishery. In recent years this activity has been superseded by the development of the local nephrops fishery. For this reason there is no fish market at Whitehaven and white fish catches are generally trucked to Fleetwood for auctioning. Like Maryport, Whitehaven was originally developed for the commercial trade associated with local mining and steel making. Captain Cook sailed from Whitehaven on his epic circumnavigation of the globe.

The demise of the herring trade is amply illustrated by provisional MAFF 1991 figures which identify one tonne of herring landed out of a total landed value of about £1.1m of which some £400,000 can be attributed to nephrops and about £200,000 to queens. Local St. Bees Head grounds are particularly rich in nephrops.

There is an ice plant and there are three vessel agencies. Kilkeel fishselling is of course like Donnans part of an Ulster based operation.

West Cumbria is a development area with its own development corporation and there are plans for a major re-development of Whitehaven harbour. Part of this scheme involves impounding the water by the construction of locks. There is also a proposal to build a fishmarket. Whitehaven's value landed is about £1m annually as opposed to Fleetwood's £3m. However, most of Whitehaven's value is from shellfish which is not normally sold by auction. The argument for an auction must be based on attracting white-fish boats both English and Northern Irish to land at Whitehaven for auction rather than into Ulster. There are obvious practical and logistic attractions viz easier and less expensive access to UK mainland and European markets although it could be argued that fish landed in Whitehaven could easily be trucked to Fleetwood or Humberside's established auctions. Fishermen, however, traditionally prefer to see their catches sold and this could support moves to have a quayside market particularly during the spring cod fishery. Any such development would require the support of buyers.

4.3 Maryport

Another commercial port which now supports a small trawling fleet. A major tourism related development in the eighties created a marina and associated facilities but still accommodated berthage for the local fishing fleet. Unfortunately the local fishermen's company Maryport and Solway Fishermen's Cooperative failed to develop the site allocated to them within the development and were threatened with eviction early in 1993. The intervention of the local district council has averted that action at least temporarily as the fishermen have been allocated another site within the development. The Co-op are required however to develop this site and negotiation continues.

Total landings in 1992 were of about £¼m. The bulk of this was a mixed demersal fish catch.

There is no fish market. At one time much of the catch was trucked to a parent company in Eyemouth. This association is no longer in existence and the Co-op seeks outlets to a variety of markets. Much of the catch goes to Fleetwood and on a regular basis to Holland.

4.4 Silloth

A small commercial harbour owned by Associated British Ports is the base of about half a dozen shrimp boats. In 1993 a Dutch owned company established a shrimp holding operation at Silloth thus encouraging additional boats to land there.

Value of total landings reported in 1992 was about £22,000 virtually all of which was from sales of shrimp.

Silloth is situated in the upper reaches of the Solway and is approached by a difficult channel with numerous sand bars. It is unlikely to be attractive as a landing place for fishing vessels other than those fishing the local shallows despite the fact that Silloth has a substantial impounded dock area.

5. Small Ports and Landing Places

5.1 Hoylake

Situated at the mouth of the Dee Estuary on the Wirral shore Hoylake is the designated landing place for cockle collection on the huge intertidal area between the River Dee and Liverpool Bay. About £¼m value of cockles are recorded as being landed in the Dee Estuary in 1991. The official figures are notoriously underestimated. As is the case in the Burry Inlet area of South Wales there has been conflict between established pickers and newcomers, many of whom are redundant steelworkers. The Sea Fishery Committee have put in motion the preparation of legislation to control overexploitation. Hoylake lands the highest percentage 24% of all Morecambe Bay/Liverpool Bay shrimp.

5.2 Workington

Two or three small fishing vessels use the commercial docks at Workington. There was concern that a specially designated area would have to be prepared for landing catches in line with EC hygiene directives. Subsequent relaxation in the UK's interpretation of these rules has obviated the need for any further facilities provided the catch is removed by suitable transport when it is landed. Much of the catch is believed to be sold direct to the public.

5.3 Flookburgh

Is second only to Hoylake in terms of shrimp landings and is also significant for cockle gathering. Shrimp are potted at Flookburgh and cockles are cold stored at Fleetwood. Flookburgh fishermen tow shrimp sets with tractors and process ashore. There is also a whitebait fishery.

5.4 Morecambe

Is the well known centre for the Bay shrimp fishery with the catch being boiled on board prior to landing. At the time of writing the problems of compliance with European fishery hygiene regulations are being addressed, particularly as they refer to the quality of water used to rapidly cool the shrimp.

Shrimps are potted ashore and typically up to 50 persons may be employed seasonally. There is a local fleet of about 16 half deck boats.

Mussels taken in the Bay are purified at a local plant.

5.5 Blackpool to Lytham including Southport

Blackpool to Lytham including Southport. Fishermen trawl for shrimp along this coast mainly utilising either amphibious craft or converted four wheel drive ex military (Bedford) trucks. The catch may be riddled and sorted on these vehicles (craft) but further processing is carried out ashore.

Table 15 illustrates the distribution of effort in terms of tractor and boat harvesting of shellfish in the North Wales and North West Sea Fishery Committee area. (Courtesy of NW & NWSFC).

The main problems faced by these inshore fishermen/gatherers relate to the marketing and disposal of their product particularly in view of the great fluctuations in availability from season to season and indeed in demand. Availability is very dependant upon spat fall of mollusc larvae and of the arrival of shrimp larvae. Little is known of the factors affecting the latter but the settlement of young molluscs is often adversely affected by gales and rough seas during the settlement period.

The market for these products is dominated by producers on the Continent (Holland\Germany) and in the Wash area and fluctuations in production in these areas can produce troughs and peaks of demand. The nature and particularly the perishability of the product allied to new EC regulations as to hygiene standards within production and processing are added problem areas. NW & NWSFC are presently discussing with Seafish the possibility of setting up a Morecambe Bay Management Group along the lines of that successfully deployed in the Wash area. Official landings statistics are appended but clearly underestimate shellfish landings. Processors estimate that six or seven thousand tonnes of mussels were exported in 1992 as compared with recorded landings of 1250 tonnes.

6. Fish Processing and Marketing

Fleetwood is the centre of the local industry. A recent report compiled by Seafish for Lancashire Enterprises (Lawtech) identified 51 businesses employing some 600 people in the town.

Significantly it was estimated that some 30,000 tonnes of fish is moved through Fleetwood annually. Fish landings in recent years have equated to about 3,000 tonnes or 10% of all fish handled. Fish has for many years been brought into Fleetwood to augment local landings.The main source of supply has been the West coast of Scotland and the Grampian region. To some extent the pattern has changed with some merchants buying in fillets rather than whole fish. This will inevitably weaken Fleetwood 's attraction as a market as the availability of filleting skills tends to dry up.

Nevertheless the geographical location of the port adjacent to a large density of population and its still strong merchanting interests ensure that local demand, if only for distribution services is very strong.

The Lawtech report recommends investment in marketing, recognising the changing patterns in consumer demand and indeed in the type of outlets through which fish is now retailed. For example, one major supermarket group is moving away from centralised distribution and is looking towards regional sources for local supplies. Much of the fish trade tends to operate in a reactive mode rather than proactive in terms of seeking purchasers. Many of the businesses are small and staff are fully occupied looking after the day to day demands of satisfying established customers without embarking on marketing as well. It is therefore probably appropriate to seek external marketing supported through the local merchants association. The range of fish species available from local boats has of course changed significantly since the demise of the trawler companies. Large volumes of cod and haddock are the exception rather than the rule nowadays but regular, though small landings of flatfish are a feature.

The only other processing industry of any size has been located in Whitehaven. However, Dawnfresh, part of the Salvesen Group closed down recently. This firm which specialises in processing scampi decided to relocate both the operation in Whitehaven and an operation in Ipswich to a site in Central Scotland.

Meanwhile, S & J Donnan mackerel processors, closed down as a result of a financial upheaval within the Donnan Group which encompassed fishselling and vessel owning as well as processing in both Cumbria and Northern Ireland. At the time of writing a reorganisation has taken place and certainly the fishselling operation is again active. The factory has also been reactivated, under new ownership, processing nephrops and mackerel.

Molluscan shellfish are handled by processors in Morecambe and Flookburgh, the latter on a small scale.

There are indications that the local mussel trade could be expanded and could support a further exploitation of local stocks particularly of mussels.

There is a major fish distribution service located at Preston, another important link in the trade in the North West.

7. Conclusions and Recommendations

The fishing industry in North West England has suffered from major upheaval in the past 15 years, due to two principal factors:-

1. The loss of the UK fishing in Icelandic waters and;

2. The imposition of quota reductions in the Irish Sea

The Fleetwood based infrastructure has proved quite inappropriate to the new regime where skipper owned relatively small vessels predominate. These boats mainly fish short trips in the North Irish Sea.

The policy of Associated British Ports acting as a straightforward commercial organisation militates against major investment in Fleetwood for the fishing industry in view of the greatly reduced income opportunities available to the port landlords. This policy of course precludes investment which could attract the large foreign fleet of beamers back to the port, but which will not be attracted because of its present shortcomings.

Meanwhile two major vessel agencies have recently gone into liquidation at the port further weakening the financial base of the catching sector and more or less regating any opportunity of that group taking a major and hence influential role in the port.

The fleet is of predominately old vessels with all the financial implications that pertain.

The fleets operating out of Whitehaven and Maryport whilst again being predominately old vessels are much less inhibited by infrastructural problems and indeed are presently likely to receive considerable assistance as offshoots of Cumbrian development area projects. They are of course constrained by local white fish quotas as are the Fleetwood boats though in the case of Whitehaven the nephrops fishery offers a less restricted alternative. The trust format of the management at these ports is also more able to address the needs of the small fisherman. Whitehaven also benefits from strong links through agencies with Kilkeel in Ulster.

The Fleetwood industry had an opportunity to improve the working relationship with the dock landlords when Wyre Borough Council invited Wyre Fish Dock Management to manage the fish dock on behalf of Associated British Ports. Although improvements have taken place in management of the market and the selling area is to be upgarded, fishermen are unhappy that they do not have a greater stake in the management company. This situation together with the problems of the agencies has unfortunately led to another stand off between dock management and users.

About £3m value of fish is landed into Liverpool's commercial docks annually. Most of this fish is simply trucked to the Continent or to South West England. These docks are easily accessed across the tide and only nominal dues are levied.

The strength of Fleetwood is its fish processing base which still handles substantial tonnages of fish, 90% of which is trucked in from other parts of the UK. It is clearly in the interest of this sector that viable quayside market sales are continued. It is suggested that if some of the fish presently landed into Liverpool and trucked to Brixham or the Low Countries was diverted to Fleetwood market, it would benefit not only local buyers but also the boats who would incur very much lower transport costs. Any move would require the support of NW buyers and almost an act of faith by Fleetwood fishermen who have always resisted consignments of fish as likely to undermine prices. There have recently been precedents however when Wyre Fish Dock Management have brought in containers of Norwegian fish.

It is just possible that if this development created more demand and income for ABP then that body might be convinced that efforts to attract some of these foreign trawlers into Fleetwood would be worthwhile and that the necessary expenditure on deepening the approach channel, the shallowness of which is the main deterent to larger vessels, might be considered.

Clearly the improved market sales area will be an attraction and of course the ice supply is already available. Slipway facilities are also available at Fleetwood. It has to be said that unless improved sales are achieved allied to some investment in attracting larger boats then it is difficult to forecast any real improvement in the situation and indeed the fish dock's very existence will remain at the mercy of ABP's financial advisers.

A recent Seafish report recommended the instigation of market research by Fleetwood merchants. Clearly there could be links between this work and increased throughput suggested for the quayside market.

Whitehaven has a history of links with Irish fishers and dock improvements there could revive some of this trade particularly if larger boats could easily access the berths. This trade would not necessarilly compete with Fleetwood as the latter would largely be with beam trawlers landing plaice and sole with Whitehaven landing roundfish and nephrops. Local fish processors can take pelagic fish and nephrops. The question of a market sale at Whitehaven is problematical. It would have to attract buyers from other more accessible (by road) ports. However there would be a case for the provision of chilled storage for holding fish and "prawns" for onward transport. This building could be used as a sales hall if the demand arose providing it ws designed appropriately in the first place. Workington has in fact been used by several large vessels in recent times purely because of the depth available. It is however a bulk cargo port and as such not really suitable for discharging unpackaged fish.

Maryport provides berthage and a transhipment point for boats working the Isle of Man to the Solway Firth grounds and a lot of prime flatfish is landed. At the time of writing the local District Council are endeavouring to support the fishermens' co-operative in the provision of fish holding and packing premises.

The shrimp fisheries particularly on the Lancashire coast are presently in question owing to the anticipated effect of EC legislation on their working practices. The seaborne trawling and cooking system requires a supply of "potable quality" water for the rapid cooling of cooked shrimp. This is presently not available but attempts are being made to develop a system to cleanse seawater to the required standard. The maintenance of this fishery has major social implications for a number of small communities and it is to be hoped that a sensible solution can be found. Mussel fisheries are developing but they also are subject to strict purification codes. Fortunately these involve post harvest land based facilities and these are being upgraded now. It is a similar story with cockle fishers and the Sea Fishery Committees both Cumbria and North Wales and North West do a sterling job looking after the long term interests of this "fishery" in particular but also the interests of all the inshore fisheries. With their jurisdiction now extended to 6 miles this can only be of long term benefit to all who make their living from these coastal waters.

Table 1
British Landings of Main Species at Small North West Ports 1991

Port of Landing	Cod		Dogfish		Haddock		Hake		Plaice	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	0	0	0	0	0	0	0	0	0	390
Mersey Est	17	23352	16	7357	1	1035	1	1002	57	67223
Southport	0	0	0	0	0	0	0	0	0	0
Lytham St Annes	2	2179	0	16	0	0	0	0	2	1749
Lune Estuary	5	8177	10	10696	0	0	0	0	8	9641
Morecambe	0	415	0	0	0	0	0	0	4	3431
Morecambe Bay	0	320	0	0	0	0	0	0	0	0
Barrow	0	179	0	4	0	0	0	0	1	729
Whitehaven	91	111243	82	79339	2	3391	3	4403	168	150227
Workington	1	613	0	48	0	0	0	0	7	5744
Maryport	20	24119	2	1244	0	6	0	73	76	69452
Silloth	0	0	0	0	0	0	0	0	0	0

Table1 (continued)
British Landings of Main Species at Small North West Ports 1991

Port of Landing	Skate-Rays		Soles		Saithe		Whiting		Total Demersal	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	10	11623	0	34	0	0	0	0	11	13182
Mersey Est	16	13326	108	391628	0	48	9	5711	258	578032
Southport	0	0	0	0	0	0	0	0	0	0
Lytham St Annes	0	136	2	6929	0	0	2	660	10	12152
Lune Estuary	6	4717	12	47453	0	0	1	921	45	87500
Morecambe	3	2325	4	13210	0	0	1	494	13	22743
Morecambe Bay	0	0	0	0	0	0	0	0	10	4836
Barrow	0	207	0	265	0	0	0	63	1	1645
Whitehaven	13	8029	20	61979	6	3708	223	93540	633	554424
Workington	1	344	0	964	0	0	2	569	11	9358
Maryport	16	10573	6	20355	0	45	33	11023	161	153975
Silloth	0	0	0	0	0	0	0	0	0	0

Source: MAFF, Provisional

Table 2
British Landings of Main Species at Small North West Ports 1991

Port of Landing	Herring		Mackerel		Sprats		Whitebait		Total Pelagic	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	0	0	0	0	0	0	0	0	0	0
Mersey Est	0	0	0	0	0	0	0	0	0	0
Southport	0	0	0	0	0	0	0	0	0	0
Lytham St Annes	0	0	0	0	0	0	0	0	0	0
Lune Estuary	0	0	0	0	0	110	0	154	0	264
Morecambe	0	0	0	0	0	0	0	0	0	0
Morecambe Bay	0	0	0	0	0	0	0	154	0	154
Barrow	0	0	0	0	0	0	0	0	0	0
Whitehaven	1	103	17	2190	0	0	0	0	18	2293
Workington	920	138000	418	50160	0	0	0	0	1338	188160
Maryport	0	0	0	82	0	0	0	0	0	82
Silloth	0	0	0	0	0	0	0	0	0	0

Source: MAFF, Provisional

Table 3
British Landings of Main Species at Small North West Ports 1991

Port of Landing	Crabs		Cockles		Lobsters		Mussels		Queens	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	0	0	1884	229048	0	26	0	0	0	0
Mersey Est	0	0	0	0	0	0	0	0	1	358
Southport	0	0	506	62824	0	0	0	0	0	0
Lytham St Annes	0	0	203	26600	0	0	0	0	0	0
Lune Estuary	0	0	224	26430	0	0	0	0	0	0
Morecambe	0	0	76	10400	0	0	498	72480	0	0
Morecambe Bay	0	0	82	10338	0	0	6	960	0	0
Barrow	0	0	0	0	0	0	5	720	0	0
Whitehaven	0	0	0	0	0	0	55	7440	1076	384098
Workington	0	0	0	0	0	0	0	0	0	0
Maryport	0	0	13	1548	0	0	25	3325	0	114
Silloth	0	0	614	73704	0	0	0	0	0	0

Table 3 (continued)
British Landings of Main Species at Small North West Ports 1991

Port of Landing	Scallops		Shrimps/Prawns		Squid		Whelks		Total Shellfish	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	0	0	3	2880	0	0	0	0	1887	231954
Mersey Est	1	1226	0	0	0	697	0	0	2	2364
Southport	0	0	4	4000	0	0	0	0	509	66824
Lytham St Annes	0	0	2	1760	0	0	0	0	205	28360
Lune Estuary	0	192	2	2240	0	0	0	0	226	28862
Morecambe	0	0	13	20650	0	0	0	0	587	103530
Morecambe Bay	0	0	36	43148	0	0	0	0	124	54446
Barrow	0	0	0	0	0	0	0	0	5	720
Whitehaven	6	11731	0	0	2	2212	0	0	1856	1587470
Workington	0	0	0	0	0	0	0	0	0	346
Maryport	0	0	0	0	1	732	0	0	68	51805
Silloth	0	0	16	12500	0	0	0	0	630	86204

Source: MAFF, Provisional

Table 4
British Landings of Main Species at Small North West Ports 1991

Port of Landing	Total All Fish	
	Tonnes	Value
Hoylake	1898	245136
Mersey Est	260	580396
Southport	509	66824
Lytham St Annes	215	40512
Lune Estuary	271	116626
Morecambe	599	126273
Morecambe Bay	135	59436
Barrow	6	2365
Whitehaven	2507	2144187
Workington	1349	197864
Maryport	229	205862
Silloth	630	86204

Source: MAFF, Provisional

Table 5
British Landings of Main Species at Small North West Ports 1992

Port of Landing	Cod		Dogfish		Haddock		Hake		Plaice	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	0	0	0	0	0	0	0	0	0	58
Mersey Est	0	0	0	0	0	0	0	0	1	718
Southport	0	89	0	0	0	0	0	0	0	8
Lytham St Annes	0	500	0	1	0	0	0	0	1	419
Lune Estuary	3	5054	31	26036	0	56	0	275	6	4975
Morecambe	0	344	0	0	0	0	0	2	3	2302
Morecambe Bay	0	0	0	0	0	0	0	0	0	0
Barrow	0	300	0	3	0	0	0	0	1	564
Whitehaven	63	81858	48	35195	2	1897	3	4915	164	101921
Workington	2	1782	0	47	0	0	0	0	9	5301
Maryport	25	30590	5	2987	0	31	0	377	103	67186
Silloth	0	0	0	0	0	0	0	0	0	0
Glasson Dock	0	0	0	0	0	0	0	0	0	0

Table 5 (continued)
British Landings of Main Species at Small North West Ports 1992

Port of Landing	Skate-Rays		Soles		Saithe		Whiting		Total Demersal	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	8	3080	0	0	0	0	0	15	7	9098
Mersey Est	2	1502	0	1400	0	0	0	31	6	4602
Southport	0	0	0	0	0	0	0	9	0	106
Lytham St Annes	0	204	1	4801	0	0	1	470	4	6529
Lune Estuary	4	2190	10	43431	0	0	1	375	60	89767
Morecambe	3	3948	4	14702	0	0	1	560	12	23853
Morecambe Bay	0	0	0	0	0	0	0	0	7	2960
Barrow	0	72	0	18	0	0	0	61	1	1089
Whitehaven	12	8638	15	49401	2	1130	236	92359	567	410787
Workington	0	208	1	3201	0	6	1	318	14	12650
Maryport	28	20303	13	45477	0	108	29	9465	218	207151
Silloth	0	0	0	0	0	0	0	0	0	0
Glasson Dock	0	20	0	0	0	0	0	0	0	20

Source: MAFF, Provisional

Table 6
British Landings of Main Species at Small North West Ports 1992

Port of Landing	Herring		Mackerel		Sprats		Whitebait		Total Pelagic	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	0	0	0	0	0	0	0	0	0	0
Mersey Est	0	0	0	0	0	0	0	0	0	0
Southport	0	0	0	0	0	0	0	0	0	0
Lytham St Annes	0	0	0	0	0	0	0	0	0	0
Lune Estuary	0	0	0	0	0	0	0	0	0	0
Morecambe	0	0	0	0	0	0	0	0	0	0
Morecambe Bay	0	0	0	0	0	0	0	0	0	0
Barrow	0	0	0	0	0	0	0	0	0	0
Whitehaven	1	184	0	10	0	0	0	0	1	194
Workington	0	0	1646	221878	0	0	0	0	1646	221878
Maryport	0	0	0	67	0	0	0	0	0	67
Silloth	0	0	0	0	0	0	0	0	0	0
Glasson Dock	0	0	0	0	0	0	0	0	0	20

Source: MAFF, Provisional

Table 7
British Landings of Main Species at Small North West Ports 1992

Port of Landing	Crabs		Cockles		Lobsters		Mussels		Queens	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	0	0	1372	148500	0	3	0	0	0	0
Mersey Est	0	0	0	0	0	0	0	0	0	0
Southport	0	0	0	0	0	0	0	0	0	0
Lytham St Annes	0	0	0	0	0	0	0	0	0	0
Lune Estuary	0	0	43	6800	0	0	0	0	0	36
Morecambe	0	0	109	17200	0	0	1044	163080	0	0
Morecambe Bay	0	0	61	9130	0	0	206	32400	0	0
Barrow	0	0	0	0	0	0	0	0	0	0
Whitehaven	0	0	0	0	0	8	28	3680	596	20865 1
Workington	0	0	0	0	0	0	0	0	0	0
Maryport	0	0	0	0	0	0	0	0	59	22537
Silloth	0	0	0	0	0	0	0	0	0	0
Glasson Dock	0	0	0	0	0	0	0	0	0	0

Table 7 (continued)
British Landings of Main Species at Small North West Ports 1992

Port of Landing	Scallops		Shrimps-Prawns		Squid		Whelks		Total Shellfish	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Hoylake	0	0	4	2800	0	0	0	0	1376	151303
Mersey Est	0	0	0	93	0	0	0	6	0	99
Southport	0	0	5	3268	0	0	0	0	5	3268
Lytham St Annes	0	0	2	1120	0	0	0	0	2	1120
Lune Estuary	0	448	0	240	0	139	0	0	44	7663
Morecambe	0	0	9	10260	0	0	0	0	1162	190595
Morecambe Bay	0	0	24	28740	0	0	0	0	291	70270
Barrow	0	0	0	0	0	0	0	0	0	0
Whitehaven	3	6952	0	0	15	7869	0	0	1025	687666
Workington	0	0	0	0	0	49	0	0	0	131
Maryport	4	6843	0	0	2	2190	0	12	76	46728
Silloth	0	0	18	21860	0	0	0	0	18	21860
Glasson Dock	0	0	0	0	0	0	0	0	0	0

Source: MAFF, Provisional

Table 8
British Landings of Main Species at Small North West Ports 1992

Port of Landing	Total All Fish	
	Tonnes	Value
Hoylake	1384	160401
Mersey Est	6	4701
Southport	5	3374
Lytham St Annes	5	7649
Lune Estuary	103	97430
Morecambe	1174	214448
Morecambe Bay	298	73230
Barrow	1	1089
Whitehaven	1593	1098647
Workington	1659	234659
Maryport	294	253946
Silloth	18	21860
Glasson Dock	0	20

Source: MAFF, Provisional

Table 9
British Landings by Port: Jan-Dec 91
Fleetwood

Species	Tonnes	Value
Bass	0	1800
Blue Ling	0	0
Bream	0	0
Brill	23	68596
Catfish	0	382
Cod	846	1174605
Conger Eel	22	11421
Dabs	65	19370
Dogfish	99	83965
Flounders	84	13602
Gurnard	117	26944
Haddock	35	43972
Hake	37	106449
Halibut	0	1023
Halibut, Mock	0	0
Lemon Sole	11	14611
Ling	13	10813
Megrims	3	1304
Anglerfish	30	69593
Mullet	1	1521
Plaice	712	763466
Pollack	40	54093
Redfish	0	0
Saithe	45	32058
Sandeels	0	0
Sharks	0	181
Skate/Rays	350	307505
Sole	235	845277
Torsk	0	227
Turbot	8	40297
Whiting	674	351276
Blue Whiting	0	0
Whiting, Pout	33	14437
Witches	1	406

Species	Tonnes	Value
Roes	8	4635
Other Demersal	7	4292
Total Demersal	3500	4068121
Herring	1	160
Horse Mackerel	0	17
Mackerel	3	1424
Pilchards	0	0
Sprats	0	0
Other Pelagic	0	0
Total Pelagic	4	1601
Clams	0	0
Cockles	0	0
Crabs	0	0
Lobster	0	0
Mussels	0	0
Nephrops	43	109341
Oysters	0	0
Winkles	0	0
Queens	78	28956
Scallops	17	36995
Shrimps/Prawns	1	1038
Squid	17	27485
Whelks	0	0
Other Shellfish	0	5
Total Shellfish	156	203820
Total Allfish	3660	4273542

Table 10
British Landings by Port: Jan-Dec 1992
Fleetwood

Species	Tonnes	Value
Bass	0	971
Blue Ling	0	0
Bream	0	0
Brill	23	68958
Catfish	0	0
Cod	534	773267
Conger Eel	19	9256
Dabs	38	8027
Dogfish	91	69412
Flounders	83	12152
Gurnard	81	18856
Haddock	8	7979
Hake	28	72984
Halibut	0	25
Halibut, Mock	0	0
Lemon Sole	10	10584
Ling	10	8815
Megrims	0	7
Anglerfish	27	53296
Mullet	0	501
Plaice	600	457483
Pollack	18	25490
Redfish	0	0
Saithe	24	12459
Sandeels	0	0
Sharks	0	0
Skate/Rays	270	249728
Sole	149	572958
Torsk	0	3
Turbot	6	28066
Whiting	527	224267
Blue Whiting	0	0
Whiting, Pout	21	8967

Species	Tonnes	Value
Witches	0	117
Roes	2	2436
Other Demersal	7	4985
Total Demersal	2578	2702049
Herring	0	13
Horse Mackerel	0	49
Mackerel	3	1026
Pilchards	0	0
Sprats	0	0
Other Pelagic	0	0
Total Pelagic	3	1088
Clams	0	0
Cockles	0	0
Crabs	0	9
Lobster	0	59
Mussels	0	0
Nephrops	44	124852
Oysters	0	0
Winkles	0	0
Queens	42	14152
Scallops	16	32410
Shrimps/Prawns	2	1942
Squid	38	51450
Whelks	0	11
Other Shellfish	0	31
Total Shellfish	142	224916
Total Allfish	2723	2928053

Table 11
South Cumbria to the Wirral

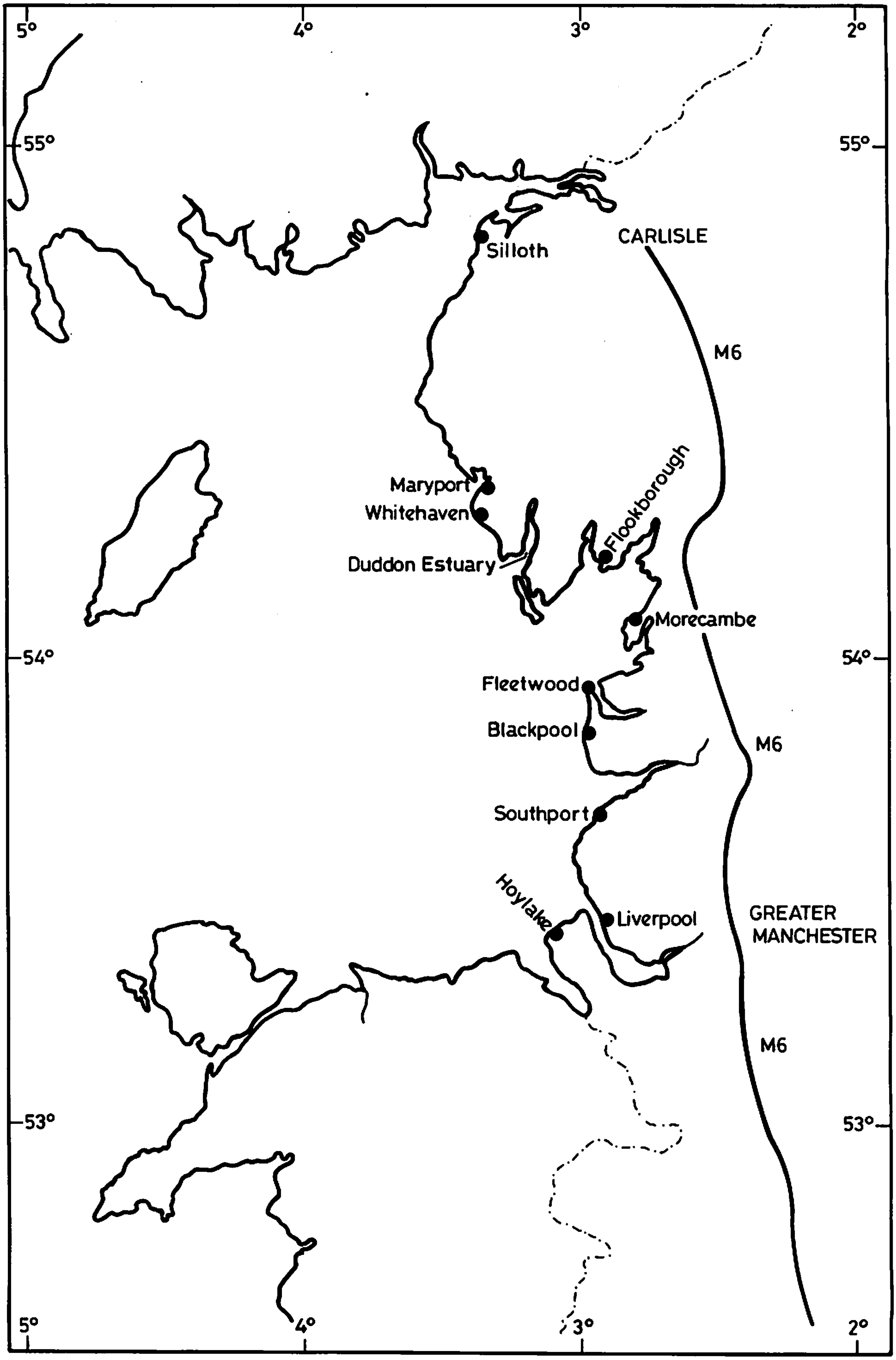
Quarter	Area	Fishing Effort			Fishing Methods
		Units	Full Time	Part Time	
July/September 1993	Northern	Men Boats Vehicles	84 18 20	85 26 23	Shrimping, Cockling, Musseling, Netting
	Central	Men Boats Vehicles	165 71 20	35 18 4	Trawling, Cockling, Shrimping, Netting, Angling
April/June 1993	Northern	Men Boats Vehicles	81 19 19	85 23 23	Shrimping, Cockling, Musseling, Netting
	Central	Men Boats Vehicles	219 83 15	22 16 0	Trawling, Cockling, Shrimping, Netting, Angling
January/March 1993	Northern	Men Boats Vehicles	121 12 18	69 19 9	Shrimping, Cockling, Musseling, Netting
	Central	Men Boats Vehicles	158 64 10	21 12 3	Trawling, Cockling, Shrimping, Netting, Angling
October/December 1992	Northern	Men Boats Vehicles	55 15 17	55 18 10	Shrimping, Cockling, Musseling, Netting
	Central	Men Boats Vehicles	227 77 22	47 16 -	Trawling, Cockling, Shrimping, Netting, Angling

Table No. 12
UK Quotas for Area Vb and Vi (West of Scotland) for Principal Commercial Species

Species	Area	1992 Quota Tonnes	1993 Quota Tonnes	1994 Quota Tonnes	1994 Quota Change %
Cod	Vb & VI	6915	7210	6640	-8%
Haddock	Vb & VI	9985	14100	12595	-11%
Whiting	Vb & VI	4535	5610	4385	-21%
Hake	Vb VI (& VII)	7140	7220	5990	-20%
Plaice	Vb & VI	1460	1460	1460	Nil
Anglerfish	Vb & VI	2950	2650	2950	+11%
Nephrops	Vb & VI	11720	12300	12300	Nil

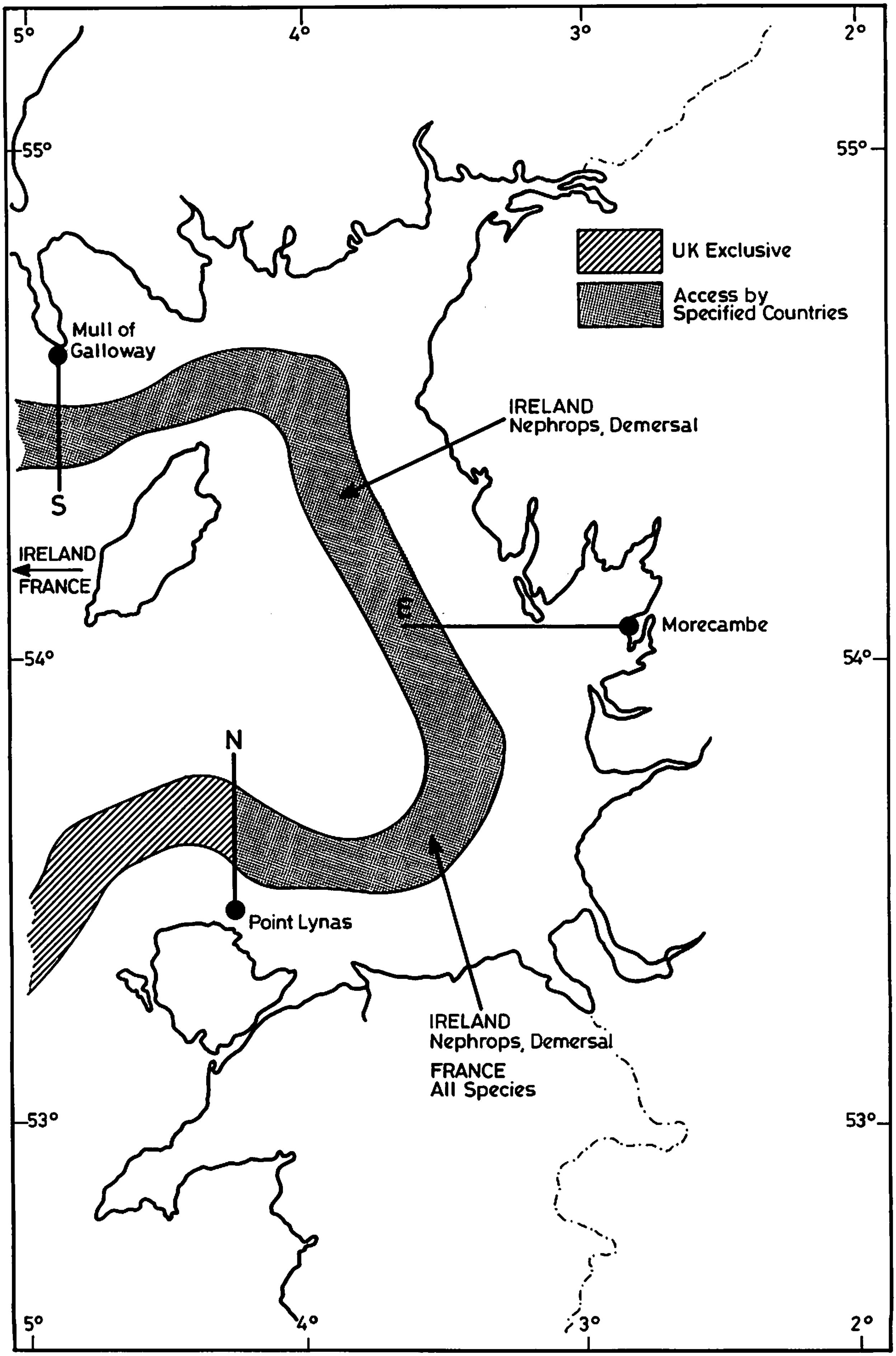
Table 13
Table 1 - Quotas and Uptake for Area VIIA for Principal Commercial Species

Species	Area	1992 Quota (Tonnes)	1992 Uptake (Tonnes)	% Uptake 1992	1993 Quota (Tonnes)	1993 Uptake (Tonnes)	% Uptake 1993	1994 Quota (Tonnes)	94 Quota as % of '93
Cod	VIIA	3815	3879	102	4125	3696	90	2710	-34
Whiting	VIIA	4695	4334	92	4390	4176	95	4380	-0.2
Plaice	VIIA	1895	1441	76	1190	1191	100	1395	+17
Sole	VIIA	505	502	99	365	366	100	535	+47
Nephrops	VII	6565	5797	88	6565	6183	94	6565	No Change



North West England

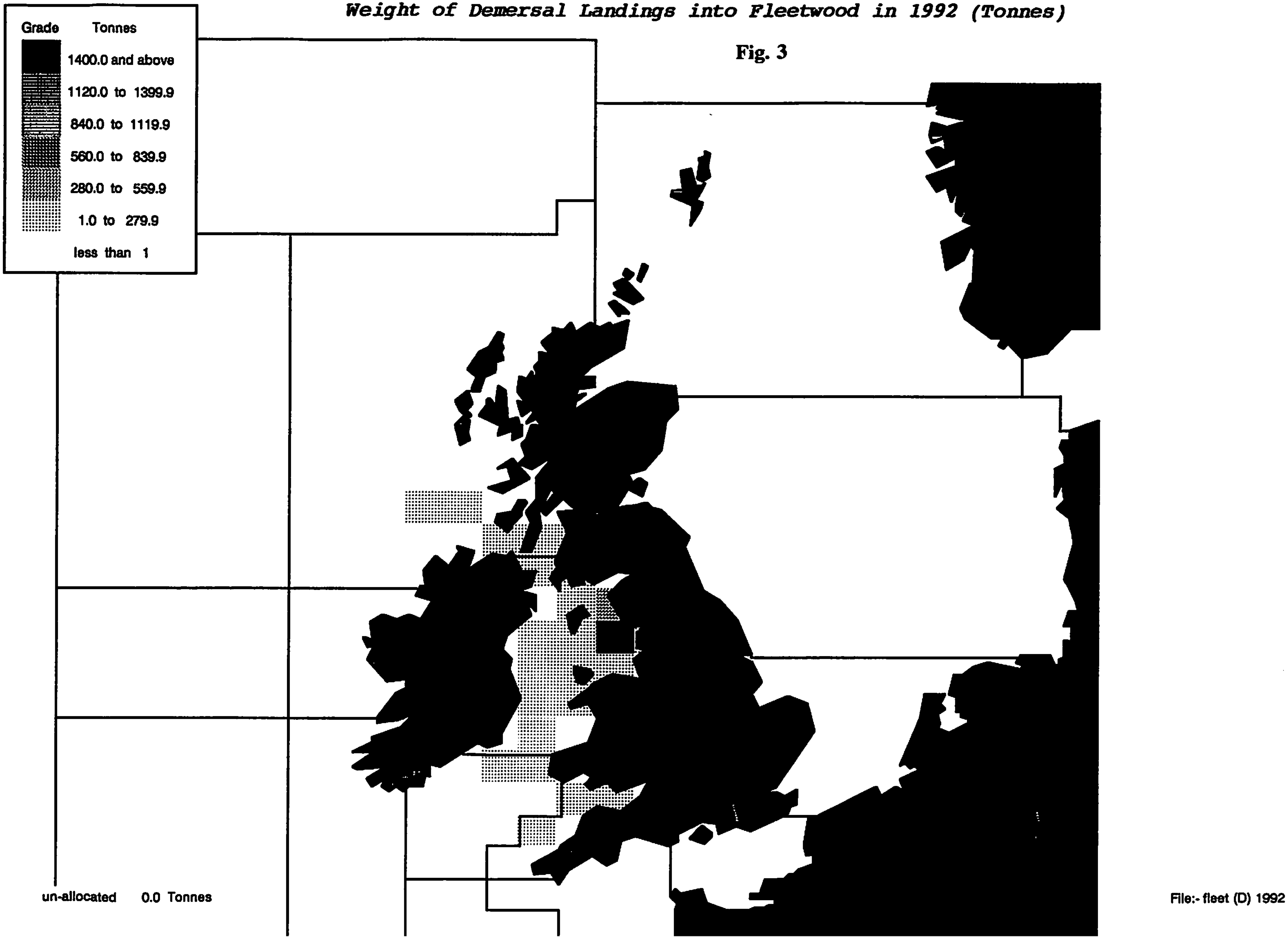
Fig.1



E.C. Vessel Traditional Rights, 6–12 miles   Fig.2

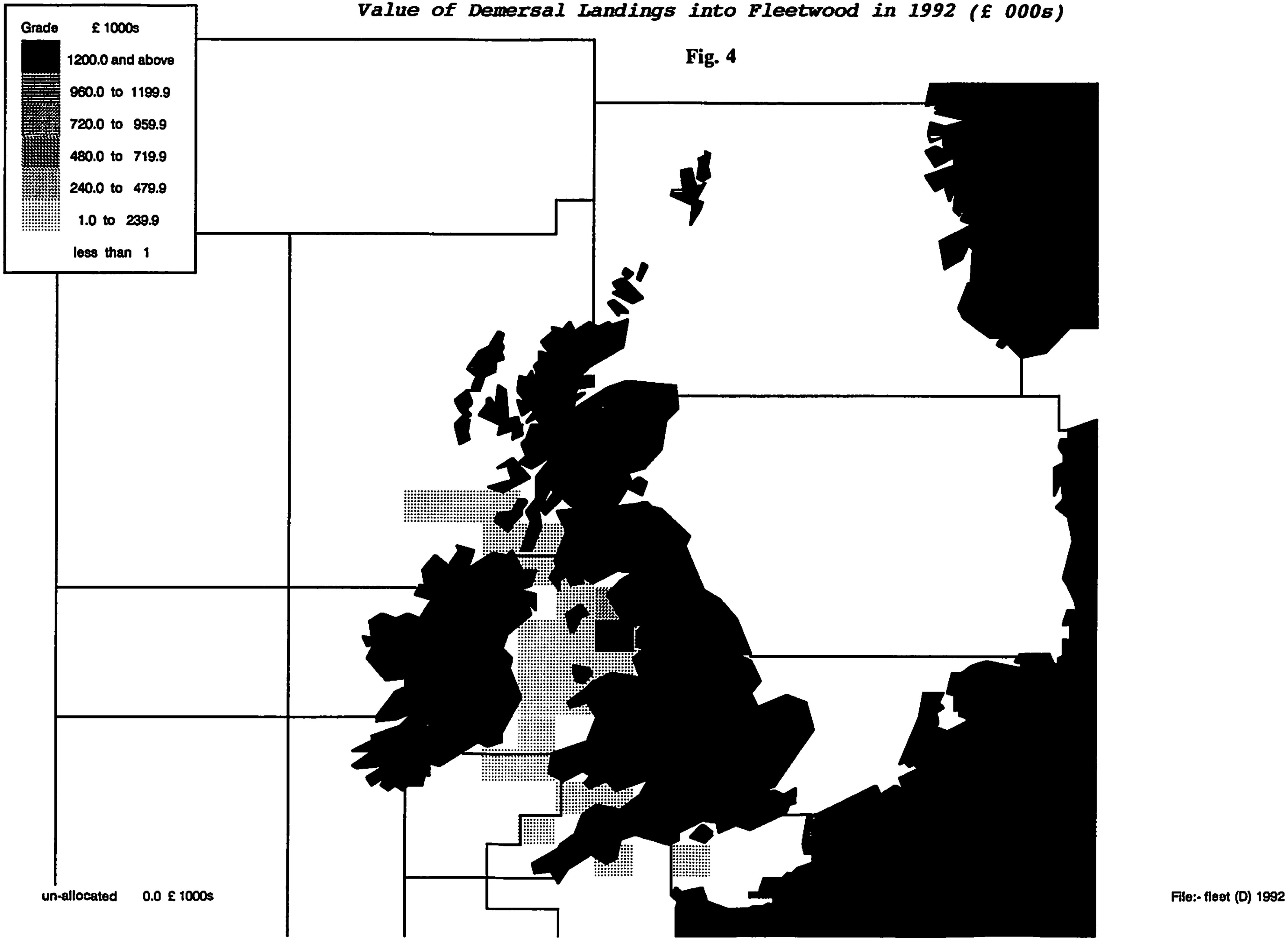
Weight of Demersal Landings into Fleetwood in 1992 (Tonnes)

Fig. 3



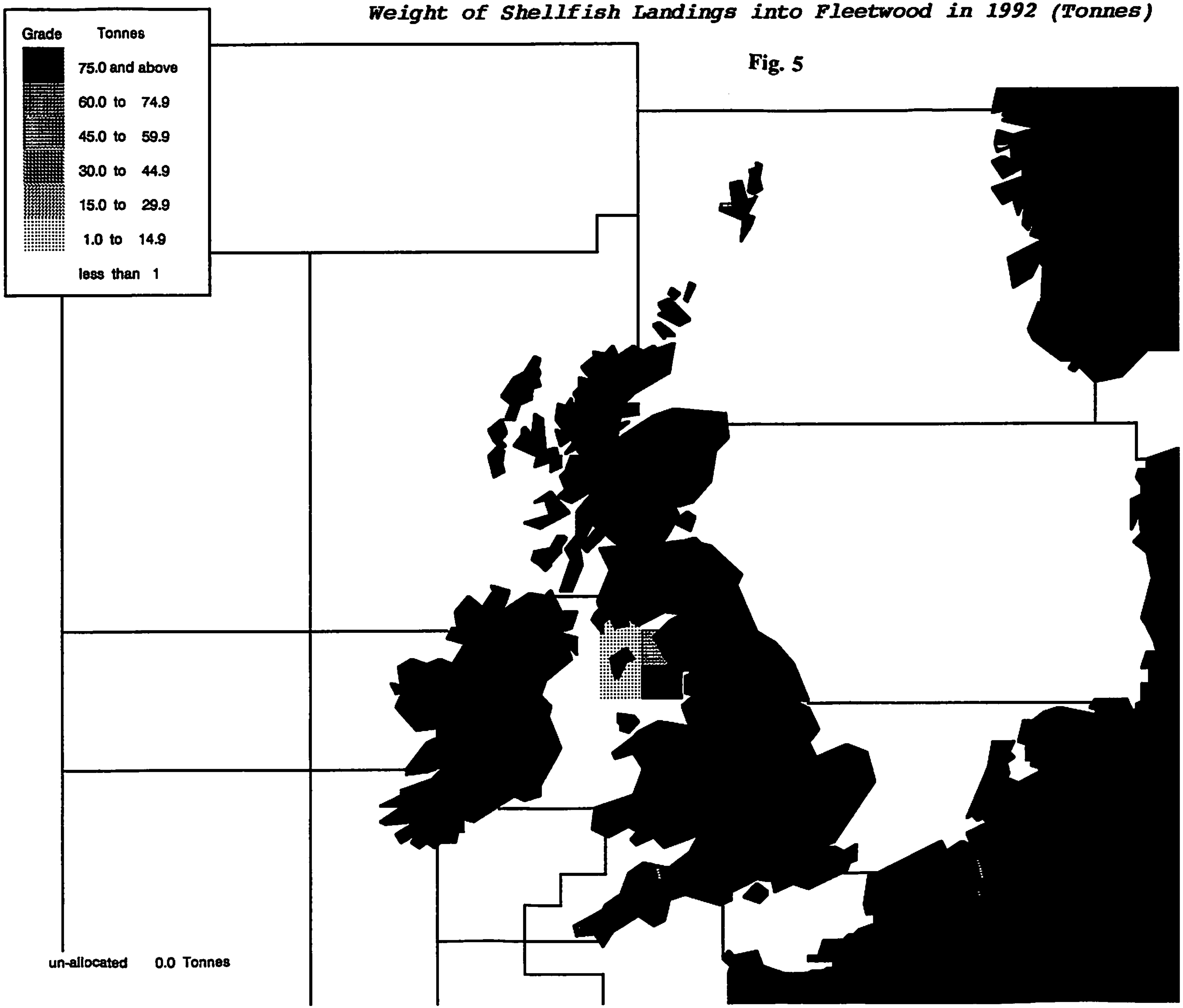
Value of Demersal Landings into Fleetwood in 1992 (£ 000s)

Fig. 4



Weight of Shellfish Landings into Fleetwood in 1992 (Tonnes)

Fig. 5



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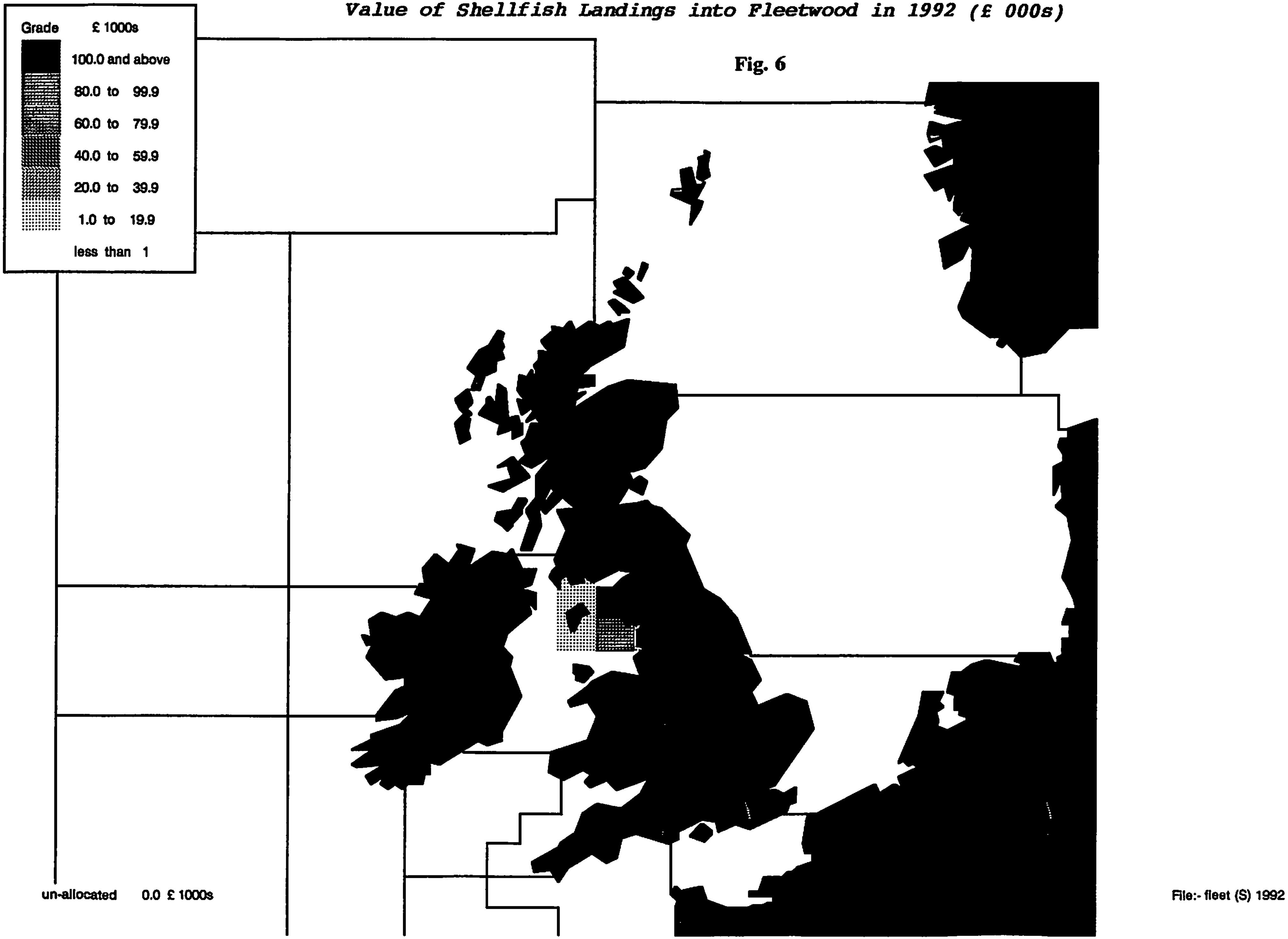
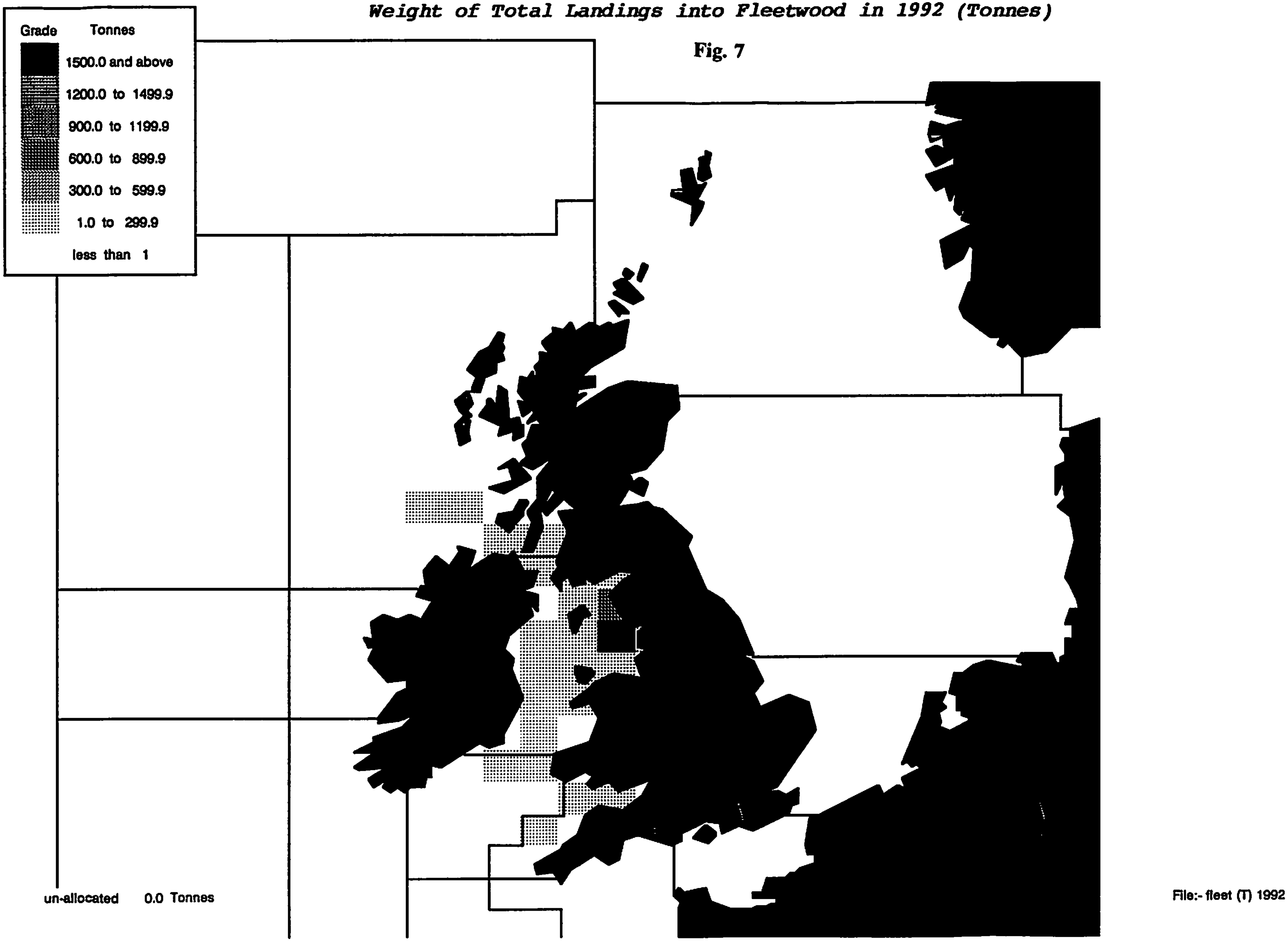
Value of Shellfish Landings into Fleetwood in 1992 (£ 000s)

Fig. 6



Weight of Total Landings into Fleetwood in 1992 (Tonnes)

Fig. 7



Value of Total Landings into Fleetwood in 1992 (£ 000s)

Fig. 8