

SEA FISH INDUSTRY AUTHORITY
Seafish Technology

SOME FACTS AND FIGURES ABOUT THE SOUTH WEST FISHERY

Internal Report No. 1409

March 1991
H. McDiarmid

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FIGURE

Figure No. 1 Fishing Ports and Landing Places in the
South West

TABLES

Table No. 1 Landings, Tonnes and Values of Principal
Species 1989

Table No. 2 Landings, Tonnes and Values of Principal
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1. THE GEOGRAPHICAL LIMITS

Two MAFF fishery 'districts' encompass Devon and Cornwall fisheries. These extend from Lyme Regis to Fowey and Fowey to Bude respectively. See Figure No. 1.

2. LANDINGS

The principal landing places in terms of value landed in 1989 were :-

	1989	(1980)
Newlyn	£13.23m	(£4.07m 1980)
Brixham	£12.13m	(£3.49m 1980)
Plymouth	£4.4m	(£4.09m 1980)
TOTAL	£29.76m	

Provision figures for 1990 (MAFF) were Newlyn £18.5m, Brixham £13.1m and Plymouth £4.18m respectively.

Provisionally, therefore, Newlyn was the top port in England and Wales in 1990.

In addition in 1989 some :

£13m value of fish and shellfish were landed at smaller ports throughout the region. The largest landings on the North coasts were at Padstow with a value of £1.4m.

The total value was £43m for the South West region.

The total tonnage landed was of the order of 38,000 tonnes in 1989.

3. THE FLEET

*67 vessels of over 80 ft in length were recorded in 1990.

169 vessels of between 10m (32.8ft) and 24.3m (79.9ft).

In addition, some 700 active vessels under 10m in length operate in this area.

This latter fleet is estimated to have increased by 150% during the 1980's.

4. THE FISHERY

Variety is the keynote of the species landings in the South West. The species landed include the most highly valued demersal species such as hake and sole.

It is estimated that some 80% of fish landed is sold on the Continent.

Most of this fish is exported in unprocessed form.

* MAFF figures include vessels operated from Spain but registered in the S.W.

TABLE 1 - Total Landings and Values of Principal Species 1989

	TONNES	VALUE £
Hake	1,009	2,581,839
Sole	1,206	6,747,692
Megrim	1,128	1,963,230
Crab	3,233	3,628,451
Lobster	85	689,386
Scallops	2,734	3,612,309
Mackerel	7,077	860,020

Source: MAFF

TABLE 2 - Landings, Tonnes and Values of Principal Species 1989

	Hake		Sole		Megrims	
	T	£	T	£	T	£
Newlyn	980	2,530,000	337	1,813,300	1001	1,758,236
Brixham	13	21,330	717	4,102,743	73	99,950
Plymouth	16	30,509	78	443,729	54	105,044
Other Ports	N/A		74	387,920	N/A	
TOTAL	1009	2,581,839	1206	6,747,692	1128	1,963,230

	Crab		Lobster		Scallop	
	T	£	T	£	T	£
Newlyn	12	6,034	1	7,030	181	180,722
Brixham	81	92,252	1	4,544	835	1,142,467
Kingswear	1555	1,807,519	6	53,667	11	16,600
Salcombe	499	492,329	4	34,240	-	-
Plymouth	108	109,540	2	14,993	937	1,212,498
Other Ports	978	1,120,777	71	574,912	770	1,060,022
TOTAL	3233	3,628,451	85	689,386	2734	3,612,309

Mackerel		
Newlyn	9	1,863
Brixham	54	29,212
Plymouth	5,872	579,426
Other Ports	1,142	249,519
	7,077	860,020

Source: MAFF (Provisional)

5. DEVELOPMENT TRENDS IN THE LAST DECADE

Several significant changes in fishing effort have occurred, principally in the demersal and pelagic fisheries.

A large scale development of tangle net and gillnetting for cod and hake has taken place principally out of South West Cornish ports by boats between 8m and 24.3m. Longlining has declined particularly from vessels at the upper end of this range. There is now general concern at the level of tangle net and gillnetting activity especially where there is conflict with vessels using towed gear.

Midwater trawling for mackerel has declined markedly by local vessels but there has been a considerable increase in beam trawling. Larger and more powerful vessels have joined the established Brixham based fleet to make a total of about 50 vessels and Newlyn has built up a fleet of about 20 beam trawlers.

A recent development has been the introduction of mini beamers designed to tow 4m beams and to comply the inshore restrictions on beam trawling activity. The South Devon fleet has invested in several crabbers in the size range 15 to 18m fitted with vivier tanks. These vessels are no longer limited to fishing local stocks and some seasonally work the North and West of Scotland and North Sea grounds mainly in the offshore areas.

Scallop dredging continues to be an important activity as in indicated by Table 2 showing virtually the same level of income for scallops and crabs in the S. W. region.

6. THE MACKEREL BOX

The mackerel box extends from 49° 50'N to 52° 00'N and 3° 00'W to 7° 00'W. This is a zone effectively covering inshore and offshore areas of Devon and Cornwall within which the taking of mackerel other than as a by-catch is prohibited except by static

gear vessels. This is a prime example of local preference and is of extreme importance to several hundred small boats particularly in South Cornwall who depend largely on mackerel hand lining for their livelihood. The purpose of the box, however, is to protect the inshore spawning grounds to which the adult mackerel migrate to in the Spring months each year.

7. THE PILCHARD FISHERY

The traditional pilchard fishery is all but extinct having died with the progressive closure of the local canneries since World War II.

Pilchards are trawled, mainly by Scottish vessels and the fish are mainly utilised for fish paste production or fish meal.

A chronic lack of public cold storage in the South West inhibits development of this fishery. There is, however, privately owned cold storage at Plymouth but at times of peak demand this has proved insufficient to meet needs.

Seafish encouraged the development of a drift net fishery off the south coast of Cornwall in 1988 and 1989 using modern materials. Although a very high quality product resulted there were difficulties in establishing a market for this fishery which gave adequate return to the fishermen.

8. PROCESSING

Approximately 80% of value of fish and shellfish landed in the area is exported to Continental Europe in unprocessed or semi processed. There is very little added value processing in the area at the present time. The main processing centres for white fish are at Newlyn, Plymouth and Brixham. Approximately 70 small and medium firms are engaged in this trade.

9. ICE PRODUCTION

There is a general short fall of ice production in the area particularly for general use by fishermen in the main ports and the cove landing places. Approximate capacities are :-

Newlyn	In excess of 100 tonne/day from various sources.
Brixham	90 tonne/day
Plymouth	18 tonne/day
Looe	approximately 13 tonne/day
Padstow	?

10. FISHING INDUSTRY ORGANISATIONS IN THE SOUTH WEST

Newlyn Fishing Boat Owners Association, affiliated to the National Federation of Fishermens Organisations	Newlyn
Cornish Fish Producers Organisation Limited	Newlyn
South Western Fish Producers Organisation Limited	Plymouth
Devon Sea Fisheries Committee	Newton Abbot
Cornwall Sea Fisheries Committee	Truro
Brixham Fish Merchants Association	
Newlyn Fish Merchants Association	
South West Fish Buyers and Processors Organisation Ltd	Plymouth
Devon and Cornwall Fisheries Training Assoc. (from April 1991)	

The Devon and Cornwall Development Company is a local initiative aimed at assisting all industries in the area including fishing on such issues as planning, land acquisition and political lobbying.

11. PORT DEVELOPMENTS

Major reconstruction of quays and market buildings have taken place at both Newlyn and Brixham since 1985.

New packing facilities and a market have been built at Looe in the period 1987-89.

Planning is at an advanced stage to relocate fish landing and market facilities at Sutton Harbour, Plymouth.

Fishing Ports and Landing Places in the South West

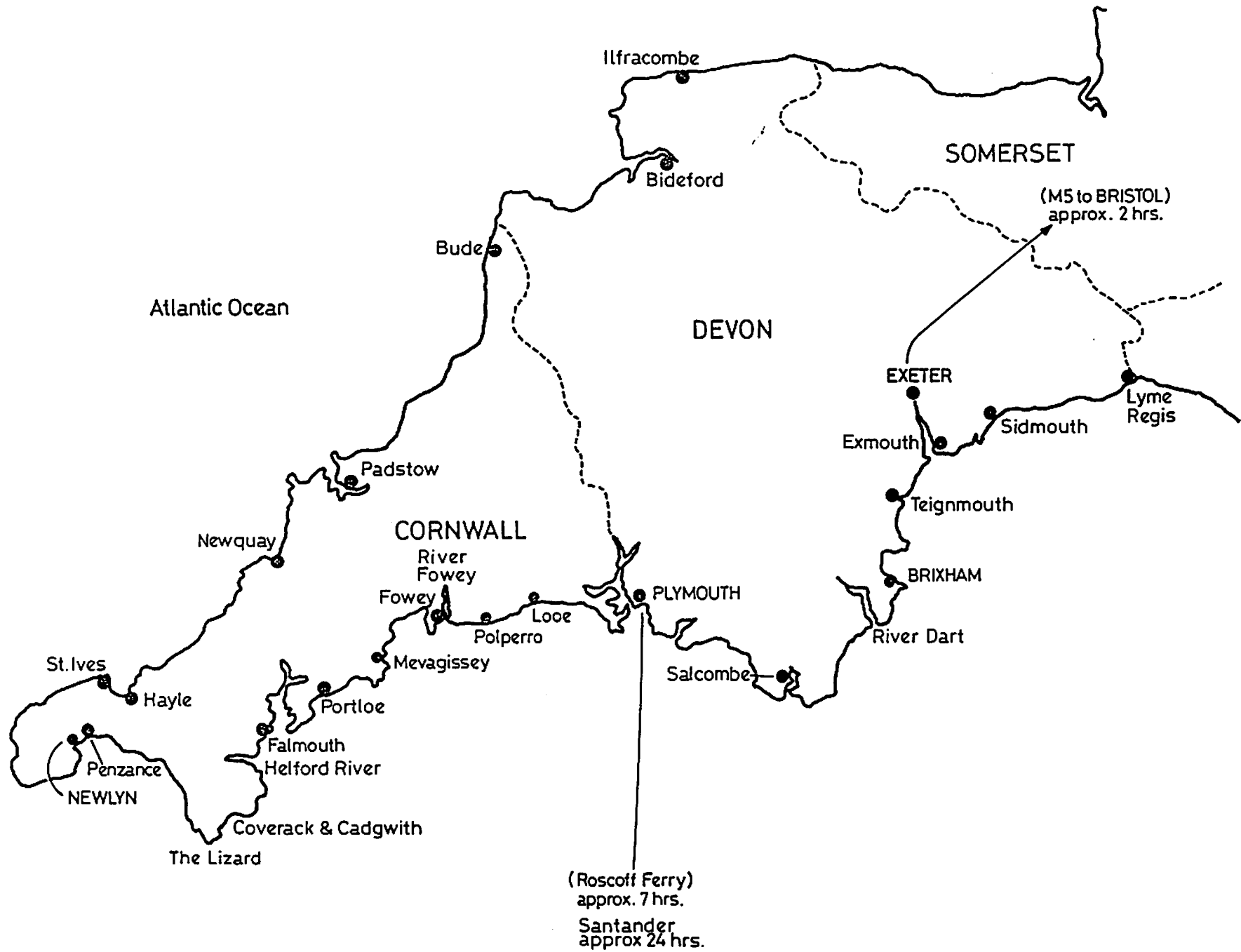


Fig. 1