2008 Economic Survey of the UK Fishing Fleet

Short Report

2008 Economic Survey of the UK Fishing Fleet

Short Report

Authors:
Hazel Curtis
Colin Brodie
Enrico Longoni

July 2010

Seafish Economics
Seafish
18 Logie Mill
Logie Green Road
Edinburgh EH7 4HS

The authors would like to thank all the members of the fishing industry who contributed to this study.

We are especially grateful to:

The vessel owners and skippers who contributed their time to complete questionnaires and participate in interviews.

The national fishermen's organisations for supporting this project from the outset.

The producer organisations, vessel agents and fishermen's associations throughout the UK who assisted by making membership lists available, encouraging members to participate and by facilitating interviews.

The UK government fisheries departments, and Marine Management Organisation, particularly Kevin Williamson and Katy Barratt.

Johnson Carmichael and all the other accountants who supplied accounts on behalf of vessel owners.

The authors would particularly like to thank Seafish colleagues who managed and carried out the extensive field research and helped to create the raw data set for this report, especially Mark Edmonds who managed the data collection phase of the project and Mike Montgomery, Mike Humphrey and Gus Caslake who contributed to interviewing fishermen.

We would also like to thank temporary research assistant Robin Johnson and the summer research team of Ash Roberts, Jennifer Kirby, Estelle Jones and Ian Marr.

To download a copy of the full 2008 report, go to:

www.seafish.org/resources/publications

Contents

Introduction

This short report presents the key fleet-wide findings of the *2008 Economic Survey of the UK Fishing Fleet.* The full report provides a detailed insight into the financial and operational performance of the UK fishing fleet during 2008. The full report is the fourth edition of this annual report and it reflects our efforts at Seafish to build up a valuable time series of fleet financial data.

The information presented in this report is a comprehensive and accurate reflection of the financial performance of the UK fishing fleet and is used by a wide range of people across industry, governments and academia. We hope that availability of accurate economic data and expert analysis of fleet performance will be used to enhance fisheries management and will be of benefit to the UK fleet in the long-run. Production of this report is only possible with the goodwill of all the vessel owners and their accountants who contributed to the survey.

We continually try to improve the quality and usefulness of the economic data on the UK fleet. Following feedback from industry on the usefulness of data on some of the under 10m segments used in previous reports, the 2008 report includes new segments to separate less active vessels from commercial vessels. We believe that this new segmentation provides a more useful analysis of vessel activity particularly among the under 10m fleet.

We recommend that readers refer to the Method section of the full report for further information on interpreting some of the information presented in this short report.

If you have any comments on this report or the full report, would like to suggest improvements to be made in future reports or would like more detailed information, please contact:

Seafish Economics
Seafish
18 Logie Mill
Logie Green Road
Edinburgh
EH7 4HS

Telephone: 0131 524 8660
E-mail: economics@seafish.co.uk

UK fleet analysis

Fleet Segmentation

The UK fishing fleet is made up of a very wide range of vessel types, gear types and activity levels. These range from high-activity whitefish vessels, some of which are at sea for over 300 days per year with earnings well over £1million, to low-activity under 10m boats, with annual earnings of less than £10,000.

Since 2002, Seafish has developed a fleet segmentation based on the physical characteristics of vessels, activity level, the gear used, species targeted and areas fished. The aim is to provide useful information on the financial performance of groups of comparable or similar vessels.

For the 2008 analysis we defined 33 Seafish segments to categorise the UK fleet and these are shown in Table 1. Some segments have many vessels, such as the under 10m pots and traps segment which has 1,032 vessels, while others have very few, such as the Area VIIdefg 15-40m trawlers, with just 14 vessels. Segments contain at least ten vessels so that reliable data can be collected, robust estimates of costs and profits can be produced, and confidentiality can be assured.

For the 2008 fleet report two new 'low activity' segments were created for under 10m and 10m and over vessels. Vessels in these two segments earned less than £10,000 per year and / or spent less than 20% of the average days at sea for the related segment. The removal of these vessels from other segments prevents the turnover averages being skewed by vessels which are not fully commercially active.

A new Miscellaneous vessels segment includes the activity of vessels which could not be included in any other segment.

Fishing Income

In 2008, the total volume of recorded fish landings by UK vessels at home and abroad was 588,000 tonnes, with a value of £646million, a 4% fall from 2007 in volume and 3% fall in value (Figure 1). Fishing income figures presented in this report are based on official landings data collected by the Marine Management Organisation (MMO), and refer to the fishing activity of every active vessel registered in the UK fleet in 2008.

Average fishing income per vessel in each Seafish segment is shown in Table 1. The average level of fishing income for 2008 varies significantly across different segments, ranging from £47,580 for vessels in the Under 10m passive other segment to £4.4million for vessels in the Pelagic over 40m segment.

Segment	No. of Vessels	Average Fishing Income £	Average Days at Sea
Area VIIa demersal trawl	14	187,470	149
Area VIIa nephrops single rig	64	137,087	145
Area VIIa nephrops twin rig	27	259,900	169
Area VII scallopers	41	537,303	187
Area VIIdefg trawlers 10-15m	55	122,588	156
Area VIIdefg trawlers 15-40m	14	655,513	247
Gill netters	33	330,030	169
Long liners	16	397,900	236
North Sea beam trawl over 300kw	15	1,302,173	205
North Sea beam trawl under 300kw	18	97,000	93
North Sea nephrops single rig	49	131,337	124
North Sea nephrops twin rig	114	467,741	199
NSWOS demersal single-rig trawl over 24m	41	1,140,906	214
NSWOS demersal pair seine / trawl	41	633,671	172
NSWOS demersal seine netters	22	553,467	150
NSWOS demersal twin rig trawl	20	892,396	198
NSWOS demersal under 24m over 300kw	28	682,554	204
NSWOS demersal under 24m under 300kw	32	167,954	135
NSWOS scallopers	65	298,979	158
Pelagic over 40m	31	4,398,089	74
Pots and traps 10-12m	167	94,665	167
Pots and traps over 12m	86	243,653	175
South West beam trawl 221kw and under	21	346,023	220
South West beam trawl over 221kw	27	524,982	207
Under 10m demersal trawl/seine	195	63,294	108
Under 10m mobile other	65	47,955	94
Under 10m passive other	344	47,580	100
Under 10m pots and traps	1,032	50,169	119
WOS nephrops single rig	146	144,538	158
WOS nephrops twin rig	43	236,916	185
Miscellaneous	53	500,033	119
Low activity 10m and over	114	19,222	24
Low activity under 10m	1,856	3,620	29

Table 1: Fishing income and days at sea by segment
(Source: MMO and Seafish)

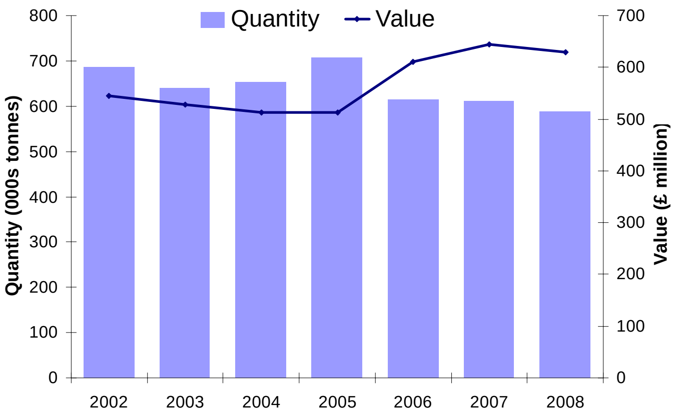

Figure1: Fish landings by UK vessels (Source: MMO)

Total quantity and value of fish landings by UK vessels fell in 2008 compared to 2007, see Figure 1.

Figure 2 shows that the 2008 average price per tonne of demersal fish increased compared to 2007 by 8% to £1,250, while the average price per tonne of shellfish fell by 8% to £1,774 in 2008. Prices for pelagic species rose by 2% to £500 per tonne from 2007 to 2008.

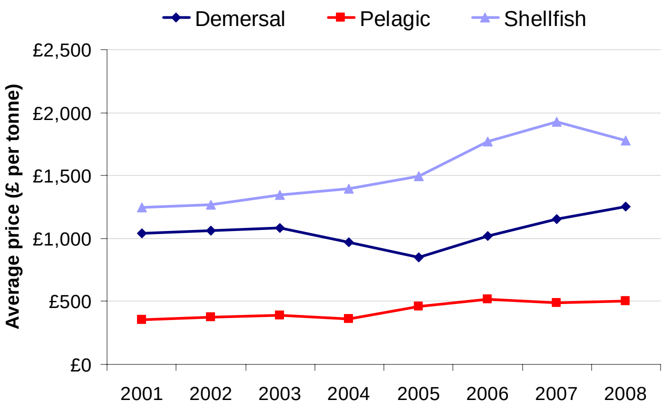

Figure 2: Average value of species groups (Source: MMO)

Fishing income is driven by the amount (volume) of fish that vessels catch per day and the price obtained for the fish landed. Table 2 shows the tonnes landed per day, the average price per tonne landed for all species combined and the average fishing income per day for each fleet segment. There is significant variation across segments in volume landed per day, price per tonne and fishing income per day. For example the Pelagic over 40m segment landed 170 tonnes per day and had an average fishing income per day at sea of £87,610, while vessels in the Under 10m pots and traps segment landed 0.19 tonnes per day and had an average fishing income per day of £489.

Segment	Average per vessel		
	Landings per day (tonnes)	Price per tonne (£)	Income per day (£)
Area VII scallopers	1.76	1,806	2,592
Area VIIa demersal trawl	0.60	1,795	1,103
Area VIIa nephrops single rig	0.52	1,796	914
Area VIIa nephrops twin rig	0.83	1,851	1,536
Area VIIdefg trawlers 15-40m	1.12	2,278	2,518
Area VIIdefg trawlers 10-15m	0.38	2,184	778
Gill netters	0.78	2,944	1,714
Long liners	1.17	1,610	1,876
North Sea beam trawl over 300kw	3.05	1,921	6,115
North Sea beam trawl under 300kw	0.39	3,122	1,181
North Sea nephrops single rig trawl	0.46	2,126	942
North Sea nephrops twin rig trawl	1.07	2,153	2,285
NSWOS demersal single-rig trawl over 24m	3.45	1,600	5,058
NSWOS demersal pair seine / trawl	2.74	1,295	3,500
NSWOS demersal seine netters	2.61	1,358	3,410
NSWOS demersal twin rig trawl	2.34	1,827	3,962
NSWOS demersal under 24m over 300kw	1.76	1,883	3,203
NSWOS demersal under 24m under 300kw	0.68	2,095	1,154
NSWOS scallopers	1.24	1,931	1,837
Pelagic over 40m	170.09	477	87,610
Pots and traps 10-12m	0.30	3,557	590
Pots and traps over 12m	0.94	1,830	1,311
South West beam trawl 221kw and under	0.61	2,777	1,573
South West beam trawl over 221kw	0.95	2,643	2,416
Under 10m demersal trawl/seine	0.24	2,557	560
Under 10m mobile other	0.28	2,822	567
Under 10m passive other	0.24	2,930	482
Under 10m pots and traps	0.19	4,773	489
WOS nephrops single rig	0.37	2,680	884
WOS nephrops twin rig	0.57	2,454	1,279

Table 2: Average vessel landings per day and average prices, by segment (Source: MMO and Seafish)

Operating Costs

Fishing vessels incur a range of operating costs which can be split into fishing costs and vessel costs. Fishing costs include fuel and oil, boxes, ice, food and stores, sales commission, harbour dues, subscriptions and levies, shore labour, travel costs, quota leasing, days at sea purchase and crew share (wages). Fishing costs vary depending on the amount of vessel activity. Vessel costs comprise gear and vessel repairs, insurance, administration, and the purchase, hire and maintenance of electronic equipment. Many vessel costs are fixed, regardless of level of vessel activity during the year.

Average vessel operating costs for each segment are shown in Table 3. Seafish estimates show that operating costs ranged from 58% of income for the Under 10m pots and traps segment to 123% of income for the North Sea beam trawl under 300kw segment.

Segment	Average per vessel		
	Annual operating costs (£)	Operating costs as % of income	Fuel cost as % of income
Area VIIa demersal trawl	181,716	96%	42%
Area VIIa nephrops single rig	102,170	75%	20%
Area VIIa nephrops twin rig	195,938	75%	22%
Area VII scallopers	404,882	75%	15%
Area VIIdefg trawlers 10-15m	90,606	73%	24%
Area VIIdefg trawlers 15-40m	518,970	75%	19%
Gill netters	282,839	86%	9%
Long liners	315,017	75%	19%
North Sea beam trawl over 300kw	1,030,930	75%	19%
North Sea beam trawl under 300kw	119,034	123%	23%
North Sea nephrops single rig trawl	125,517	90%	24%
North Sea nephrops twin rig trawl	428,265	87%	24%
NSWOS demersal single-rig trawl over 24m	1,139,117	94%	32%
NSWOS demersal pair seine / trawl	607,439	94%	18%
NSWOS demersal seine netters	489,950	86%	14%
NSWOS demersal twin rig trawl	885,708	92%	33%
NSWOS demersal under 24m over 300kw	651,387	87%	23%
NSWOS demersal under 24m under 300kw	144,267	84%	15%
NSWOS scallopers	247,855	80%	20%
Pots and traps 10-12m	66,680	69%	11%
Pots and traps over 12m	237,097	89%	27%
South West beam trawl 221kw and under	321,722	93%	32%
South West beam trawl over 221kw	454,769	85%	26%
Under 10m demersal trawl/seine	58,214	87%	15%
Under 10m mobile other	43,493	86%	18%
Under 10m passive other	32,108	66%	13%
Under 10m pots and traps	31,884	58%	11%
WOS nephrops single rig	126,317	84%	22%
WOS nephrops twin rig	205,790	81%	21%

Table 3: Average vessel costs by segment (Source: MMO and Seafish)

Fuel

In 2008, the spike in oil prices had a major impact on the UK fishing fleet, raising costs and lowering profit. Some segments using very fuel-intensive fishing methods, such as the demersal trawl, nephrops trawl and beam trawl segments, were more affected by the high prices of oil compared to segments using less fuel-intensive methods, such as seine netting and passive gears.

During the summer, when prices peaked, some vessels were tied up or operated only part time because they could not make an acceptable operating profit with fuel at those prices.

As shown in Table 3, the amount of fuel consumed varies significantly between segments, with total annual spend on fuel ranged from 9% of income for the Gill netters segment to 42% of income for Area VIIa demersal trawlers. Table 3 shows that for most segments the cost of fuel represents a significant percentage of earnings.

Table 4 shows the average vessel fuel consumption for each segment. The average fuel consumption in litres per day ranged from 106 litres for the Under 10m passive other segment to 3,400 litres per day for the NSWOS demersal twin rig segment.

.

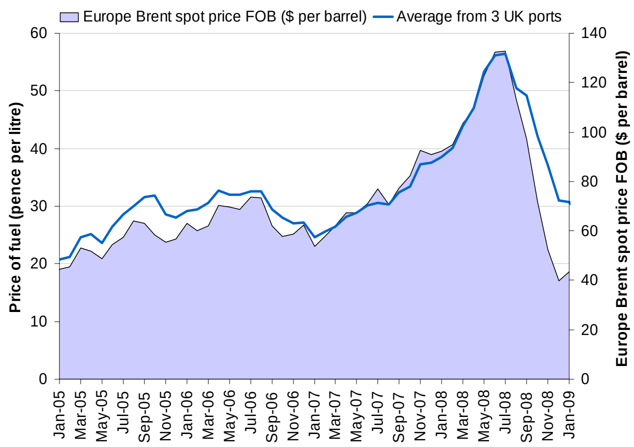

Figure 3: Oil price and marine fuel price (Source: Seafish)

Segment	Average per vessel		
	Annual fuel Cost (£)	Fuel cost per day (£)	Litres per day
Area VIIa demersal trawl	78,883	474	1,046
Area VIIa nephrops single rig	27,427	183	403
Area VIIa nephrops twin rig	55,962	324	717
Area VII scallopers	79,069	384	849
Area VIIdefg trawlers 10-15m	30,414	189	418
Area VIIdefg trawlers 15-40m	131,758	506	1,118
Gill netters	29,508	175	386
Long liners	79,978	340	749
North Sea beam trawl over 300kw	261,737	1,229	2,715
North Sea beam trawl under 300kw	22,079	226	500
North Sea nephrops single rig trawl	32,927	244	538
North Sea nephrops twin rig	119,681	595	1,314
NSWOS demersal single-rig trawl over 24m	383,562	1,796	3,968
NSWOS demersal pair seine / trawl	116,105	670	1,479
NSWOS demersal seine netters	79,216	476	1,052
NSWOS demersal twin rig trawl	320,076	1,539	3,400
NSWOS demersal under 24m over 300kw	174,104	847	1,871
NSWOS demersal under 24m under 300kw	26,333	196	432
NSWOS scallopers	61,022	366	808
Pots and traps 10-12m	10,614	63	138
Pots and traps over 12m	70,981	393	867
South West beam trawl 221kw and under	112,071	521	1,150
South West beam trawl over 221kw	140,865	679	1,500
Under 10m demersal trawl/seine	9,714	89	198
Under 10m mobile other	9,212	98	215
Under 10m passive other	6,465	62	137
Under 10m pots and traps	5,894	48	106
WOS nephrops single rig	33,556	200	442
WOS nephrops twin rig	52,490	283	624

Table 4: Fuel consumption and cost by segment
(Source: MMO and Seafish)

Profit

Operating profit is calculated as total income less operating costs. Seafish estimated that the total operating profit of the UK fleet in 2008 was £156million, equivalent to 24% of total fleet earnings. This estimate includes estimates of operating profit for all segments, including those not shown in detail in this report.

All but two of the 31 Seafish fleet segments made an operating profit in 2008. Average operating profit/loss as a percentage of earnings ranged from 42% for the Under 10m pots and traps segment to -23% for the North Sea beam trawl under 300kw segment.

Net profit is operating profit less depreciation and interest. Seafish estimated that total net profit of the UK fleet in 2008, was £78million, equivalent to 12% of income. Net profit/loss as a percentage of earnings ranged from 26% for the Under 10m pots and traps segment to -34% for the North Sea beam trawl under 300kw segment.

.

Segment	Average per vessel		
	Operating profit (£)	Operating profit margin	Net profit margin
Area VIIa demersal trawl	7,905	4%	- 6%
Area VIIa nephrops single rig	34,916	25%	24%
Area VIIa nephrops twin rig	63,979	25%	16%
Area VII scallopers	132,690	25%	15%
Area VIIdefg trawlers 10-15m	33,591	27%	19%
Area VIIdefg trawlers 15-40m	177,120	25%	12%
Gill netters	47,191	14%	11%
Long liners	107,513	25%	12%
North Sea beam trawl over 300kw	351,847	25%	12%
North Sea beam trawl under 300kw	- 22,034	- 23%	- 34%
North Sea nephrops single rig trawl	13,848	10%	7%
North Sea nephrops twin rig trawl	64,337	13%	2%
NSWOS demersal single-rig trawl over 24m	77,262	6%	- 2%
NSWOS demersal pair seine / trawl	36,094	6%	- 4%
NSWOS demersal seine netters	79,952	14%	8%
NSWOS demersal twin rig trawl	80,854	8%	- 1%
NSWOS demersal under 24m over 300kw	96,877	13%	4%
NSWOS demersal under 24m under 300kw	27,585	16%	7%
NSWOS scallopers	63,334	20%	12%
Pots and traps 10-12m	30,482	31%	21%
Pots and traps over 12m	30,538	11%	2%
South West beam trawl 221kw and under	24,521	7%	0%
South West beam trawl over 221kw	82,813	15%	9%
Under 10m demersal trawl/seine	8,335	13%	- 9%
Under 10m mobile other	7,331	14%	1%
Under 10m passive other	16,350	34%	12%
Under 10m pots and traps	23,342	42%	26%
WOS nephrops single rig	24,666	16%	10%
WOS nephrops twin rig	48,697	19%	13%

Table 5: Average profit and profit margin by segment
(Source: MMO and Seafish)

UK Fleet Summary Tables

Table 6: 2008 segment total income, costs and profit (£)

Segment	Active Vessels	Fishing Income	Non-fishing Income	Total Income	Fuel cost	Crew Share cost	Other Fishing costs
Area VIIa demersal trawl	14	2,624,583	30,115	2,654,697	1,104,362	557,518	259,797
Area VIIa nephrops single rig	64	8,773,540	0	8,773,540	1,755,353	2,675,161	1,040,149
Area VIIa nephrops twin rig	27	7,017,312	440	7,017,752	1,510,977	1,601,251	1,197,781
Area VII scallopers	41	22,029,414	11,020	22,040,432	3,241,830	6,329,713	1,734,751
Area VIIdefg trawlers 10-15m	55	6,742,327	88,504	6,830,831	1,672,772	1,150,021	631,355
Area VIIdefg trawlers 15-40m	14	9,177,188	568,068	9,745,256	1,844,615	2,481,511	648,827
Gill netters	33	10,890,982	0	10,890,982	973,757	3,396,302	1,344,517
Long liners	16	6,366,396	394,080	6,760,476	1,279,645	1,721,473	450,104
North Sea beam trawl over 300kw	15	19,532,596	1,209,068	20,741,664	3,926,052	5,281,614	1,380,955
North Sea beam trawl under 300kw	18	1,746,002	0	1,746,002	397,414	873,181	64,312
North Sea nephrops single rig	49	6,435,504	393,346	6,828,851	1,613,423	1,837,059	846,867
North Sea nephrops twin rig	114	53,322,528	2,834,075	56,156,603	13,643,653	13,797,936	8,456,275
NSWOS demersal single-rig trawl over 24m	41	46,777,165	3,094,365	49,871,530	15,726,029	10,956,712	9,620,157
NSWOS demersal pair seine / trawl	41	25,980,516	404,331	26,384,846	4,760,321	7,463,627	6,245,709
NSWOS demersal seine netters	22	12,176,285	361,557	12,537,842	1,742,759	3,493,837	2,433,505
NSWOS demersal twin rig trawl	20	17,847,929	1,483,322	19,331,249	6,401,517	4,256,610	3,553,099
NSWOS demersal under 24m over 300kw	28	19,111,524	1,839,870	20,951,394	4,874,900	5,021,613	3,751,838
NSWOS demersal under 24m under 300kw	32	5,374,539	124,727	5,499,267	842,665	1,356,351	1,036,732
NSWOS scallopers	65	19,433,639	793,650	20,227,285	3,966,430	3,890,705	2,056,600
Pots and traps 10-12m	167	15,809,035	417,057	16,226,091	1,772,486	4,089,291	1,685,900
Pots and traps over 12m	86	20,954,165	2,062,430	23,016,594	6,104,355	5,651,939	3,066,783
South West beam trawl 221kw and under	21	7,266,487	4,608	7,271,095	2,353,483	1,826,474	922,613
South West beam trawl over 221kw	27	14,174,501	340,215	14,514,717	3,803,359	3,826,816	1,573,374
Under 10m demersal trawl/seine	195	12,342,291	634,802	12,977,094	1,894,224	3,311,507	1,278,533
Under 10m mobile other	65	3,117,049	186,483	3,303,532	598,809	1,061,715	92,877
Under 10m passive other	344	16,367,646	302,027	16,669,673	2,223,966	3,922,007	1,169,701
Under 10m pots and traps	1,032	51,774,408	5,218,824	56,993,232	6,082,608	14,922,720	109,392
WOS nephrops single rig	146	21,102,590	940,864	22,043,453	4,899,146	5,500,722	2,078,157
WOS nephrops twin rig	43	10,187,396	755,567	10,942,963	2,257,072	2,380,782	1,672,131
Pelagic over 40m	31	136,340,753	-	-	-	-	-
Miscellaneous	53	26,501,736	-	-	-	-	-
Low activity 10m and over	114	2,191,343	-	-	-	-	-
Low activity under 10m	1,856	6,717,903	-	-	-	-	-
Total UK Fleet*	4,889	646,256,612	27,152,288	673,359,553	134,702,974	164,997,257	77,714,181

* Figures for the total UK fleet include estimates (not shown) for the four fleet segments at the bottom of this table.

Total Fishing Costs	Total Vessel Costs	Total Operating Costs	Operating Profit	Depreciation	Interest	Net Profit	Segment
1,921,677	622,346	2,544,023	110,674	224,358	35,806	-149,490	Area VIIa demersal trawl
5,470,663	1,068,249	6,538,912	2,234,628	105,328	58,522	2,070,779	Area VIIa nephrops single rig
4,310,009	980,315	5,290,324	1,727,428	306,383	278,496	1,142,549	Area VIIa nephrops twin rig
11,306,294	5,293,854	16,600,147	5,440,287	1,440,471	760,794	3,239,021	Area VII scallopers
3,454,147	1,529,193	4,983,341	1,847,491	161,395	399,761	1,286,335	Area VIIdefg trawlers 10-15m
4,974,953	2,290,626	7,265,579	2,479,676	899,364	454,271	1,126,959	Area VIIdefg trawlers 15-40m
5,714,576	3,619,104	9,333,680	1,557,303	252,835	75,281	1,229,187	Gill netters
3,451,223	1,589,052	5,040,276	1,720,200	623,907	315,137	781,793	Long liners
10,588,621	4,875,336	15,463,957	5,277,708	1,914,194	966,863	2,398,603	North Sea beam trawl over 300kw
1,334,907	807,705	2,142,613	-396,610	194,798	n/a	-591,408	North Sea beam trawl under 300kw
4,297,349	1,852,974	6,150,323	678,528	122,121	79,999	476,407	North Sea nephrops single rig
35,897,864	12,924,336	48,822,200	7,334,403	3,859,640	2,465,225	1,009,538	North Sea nephrops twin rig
36,302,898	10,400,903	46,703,801	3,167,728	2,835,195	1,385,886	-1,053,353	NSWOS demersal single-rig trawl over 24m
18,469,658	6,435,342	24,905,000	1,479,845	1,415,864	1,228,376	-1,164,395	NSWOS demersal pair seine / trawl
7,670,101	3,108,799	10,778,900	1,758,942	650,274	127,925	980,743	NSWOS demersal seine netters
14,211,227	3,502,931	17,714,158	1,617,091	926,903	933,036	-242,848	NSWOS demersal twin rig trawl
13,648,351	4,590,477	18,238,828	2,712,566	1,224,256	622,834	865,476	NSWOS demersal under 24m over 300kw
3,235,747	1,380,797	4,616,544	882,722	231,158	271,920	379,644	NSWOS demersal under 24m under 300kw
9,913,735	6,196,840	16,110,575	4,116,710	1,101,815	590,460	2,424,435	NSWOS scallopers
7,547,676	3,587,871	11,135,548	5,090,544	1,198,251	511,829	3,380,463	Pots and traps 10-12m
14,823,077	5,567,284	20,390,361	2,626,233	1,438,566	711,156	476,511	Pots and traps over 12m
5,102,570	1,653,592	6,756,162	514,933	129,822	409,100	-23,989	South West beam trawl 221kw and under
9,203,548	3,075,205	12,278,753	2,235,964	246,782	742,901	1,246,281	South West beam trawl over 221kw
6,484,263	4,867,414	11,351,677	1,625,417	1,570,869	1,171,115	-1,116,568	Under 10m demersal trawl/seine
1,753,401	1,073,616	2,827,017	476,515	296,764	132,089	47,662	Under 10m mobile other
7,315,674	3,729,605	11,045,279	5,624,394	2,364,189	1,240,968	2,019,238	Under 10m passive other
21,113,688	11,789,568	32,904,288	24,088,944	6,530,496	2,540,784	15,018,696	Under 10m pots and traps
12,478,026	5,964,250	18,442,276	3,601,177	562,082	795,839	2,243,257	WOS nephrops single rig
6,309,985	2,539,000	8,848,985	2,093,977	451,637	182,330	1,460,010	WOS nephrops twin rig
-	-	-	-	-	-	-	Pelagic over 40m
-	-	-	-	-	-	-	Miscellaneous
-	-	-	-	-	-	-	Low activity 10m and over
-	-	-	-	-	-	-	Low activity under 10m
377,413,379	139,708,318	517,122,731	156,236,830	51,065,280	26,829,194	78,349,763	Total UK Fleet*

* Figures for the total UK fleet include estimates (not shown) for the four fleet segments at the bottom of this table.

Table 7: 2008 segment average per vessel income, costs and profit (£)

Segment	Active Vessels	Fishing Income	Non-fishing Income	Total Income	Fuel cost	Crew Share cost	Other Fishing costs
Area VIIa demersal trawl	14	187,470	2,151	189,621	78,883	39,823	18,557
Area VIIa nephrops single rig	64	137,087	0	137,087	27,427	41,799	16,252
Area VIIa nephrops twin rig	27	259,900	16	259,917	55,962	59,306	44,362
Area VII scallopers	41	537,303	269	537,572	79,069	154,383	42,311
Area VIIdefg trawlers 10-15m	55	122,588	1,609	124,197	30,414	20,909	11,479
Area VIIdefg trawlers 15-40m	14	655,513	40,576	696,090	131,758	177,251	46,345
Gill netters	33	330,030	0	330,030	29,508	102,918	40,743
Long liners	16	397,900	24,630	422,530	79,978	107,592	28,132
North Sea beam trawl over 300kw	15	1,302,173	80,605	1,382,778	261,737	352,108	92,064
North Sea beam trawl under 300kw	18	97,000	0	97,000	22,079	48,510	3,573
North Sea nephrops single rig	49	131,337	8,027	139,364	32,927	37,491	17,283
North Sea nephrops twin rig	114	467,741	24,860	492,602	119,681	121,035	74,178
NSWOS demersal single-rig trawl over 24m	41	1,140,906	75,472	1,216,379	383,562	267,237	234,638
NSWOS demersal pair seine / trawl	41	633,671	9,862	643,533	116,105	182,040	152,334
NSWOS demersal seine netters	22	553,467	16,434	569,902	79,216	158,811	110,614
NSWOS demersal twin rig trawl	20	892,396	74,166	966,562	320,076	212,831	177,655
NSWOS demersal under 24m over 300kw	28	682,554	65,710	748,264	174,104	179,343	133,994
NSWOS demersal under 24m under 300kw	32	167,954	3,898	171,852	26,333	42,386	32,398
NSWOS scallopers	65	298,979	12,210	311,189	61,022	59,857	31,640
Pots and traps 10-12m	167	94,665	2,497	97,162	10,614	24,487	10,095
Pots and traps over 12m	86	243,653	23,982	267,635	70,981	65,720	35,660
South West beam trawl 221kw and under	21	346,023	219	346,243	112,071	86,975	43,934
South West beam trawl over 221kw	27	524,982	12,601	537,582	140,865	141,734	58,273
Under 10m demersal trawl/seine	195	63,294	3,255	66,549	9,714	16,982	6,557
Under 10m mobile other	65	47,955	2,869	50,824	9,212	16,334	1,429
Under 10m passive other	344	47,580	878	48,458	6,465	11,401	3,400
Under 10m pots and traps	1,032	50,169	5,057	55,226	5,894	14,460	106
WOS nephrops single rig	146	144,538	6,444	150,983	33,556	37,676	14,234
WOS nephrops twin rig	43	236,916	17,571	254,488	52,490	55,367	38,887
Pelagic over 40m	31	4,398,089	-	-	-	-	-
Miscellaneous	53	500,033	-	-	-	-	-
Low activity 10m and over	114	19,222	-	-	-	-	-
Low activity under 10m	1,856	3,620	-	-	-	-	-

Total Fishing Costs	Total Vessel Costs	Total Operating Costs	Operating Profit	Depreciation	Interest	Net Profit	Segment
137,263	44,453	181,716	7,905	16,026	2,558	-10,678	Area VIIa demersal trawl
85,478	16,691	102,171	34,916	1,646	914	32,356	Area VIIa nephrops single rig
159,630	36,308	195,938	63,979	11,348	10,315	42,317	Area VIIa nephrops twin rig
275,763	129,118	404,882	132,690	35,133	18,556	79,001	Area VII scallopers
62,802	27,804	90,606	33,591	2,934	7,268	23,388	Area VIIdefg trawlers 10-15m
355,354	163,616	518,970	177,120	64,240	32,448	80,497	Area VIIdefg trawlers 15-40m
173,169	109,670	282,839	47,191	7,662	2,281	37,248	Gill netters
215,701	99,316	315,017	107,513	38,994	19,696	48,862	Long liners
705,909	325,022	1,030,930	351,847	127,613	64,458	159,907	North Sea beam trawl over 300kw
74,162	44,873	119,034	-22,034	10,822	n/a	-32,856	North Sea beam trawl under 300kw
87,701	37,816	125,517	13,848	2,492	1,633	9,723	North Sea nephrops single rig
314,894	113,371	428,265	64,337	33,856	21,625	8,856	North Sea nephrops twin rig
885,437	253,681	1,139,117	77,262	69,151	33,802	-25,692	NSWOS demersal single-rig trawl over 24m
450,479	156,960	607,439	36,094	34,533	29,960	-28,400	NSWOS demersal pair seine / trawl
348,641	141,309	489,950	79,952	29,558	5,815	44,579	NSWOS demersal seine netters
710,562	175,147	885,708	80,855	46,345	46,652	-12,142	NSWOS demersal twin rig trawl
487,441	163,946	651,387	96,877	43,723	22,244	30,910	NSWOS demersal under 24m over 300kw
101,117	43,150	144,267	27,585	7,224	8,498	11,864	NSWOS demersal under 24m under 300kw
152,519	95,336	247,855	63,334	16,951	9,084	37,299	NSWOS scallopers
45,196	21,484	66,680	30,482	7,175	3,065	20,242	Pots and traps 10-12m
172,361	64,736	237,097	30,538	16,728	8,269	5,541	Pots and traps over 12m
242,980	78,742	321,722	24,521	6,182	19,481	-1,142	South West beam trawl 221kw and under
340,872	113,897	454,769	82,813	9,140	27,515	46,159	South West beam trawl over 221kw
33,253	24,961	58,214	8,335	8,056	6,006	-5,726	Under 10m demersal trawl/seine
26,975	16,517	43,493	7,331	4,566	2,032	733	Under 10m mobile other
21,266	10,842	32,108	16,350	6,873	3,607	5,870	Under 10m passive other
20,459	11,424	31,884	23,342	6,328	2,462	14,553	Under 10m pots and traps
85,466	40,851	126,317	24,666	3,850	5,451	15,365	WOS nephrops single rig
146,744	59,047	205,790	48,697	10,503	4,240	33,954	WOS nephrops twin rig
-	-	-	-	-	-	-	Pelagic over 40m
-	-	-	-	-	-	-	Miscellaneous
-	-	-	-	-	-	-	Low activity 10m and over
-	-	-	-	-	-	-	Low activity under 10m

Seafish Segmentation Criteria

		Qualifying criteria per segment				
	Segment Name	Vessel Length LOA m	Max days at sea by gear type	kW of main engine	catch composition	highest proportion landings by weight from Sea Area
2.1	Area VIIa demersal trawl over 10m	10+	otter trawl	none	50%+ by value whitefish	Area VIIa
2.2	Area VIIa nephrops single-rig trawl over 10m	10+	neph single trawl	none	50%+ by value nephrops	Area VIIa
2.3	Area VIIa nephrops twin-rig trawl over 10m	10+	neph twin trawl	none	50%+ by value nephrops	Area VIIa
2.4	Area VII scallop dredge over 10m	10+	scallop dredge	none	50%+ scallops	Area VII
2.5	Area VIIdefg trawlers 10-15m	10-14.99	otter trawl	none	none	Area VIIdefg
2.6	Area VIIdefg trawlers 15-40m	15-39.99	otter trawl	none	none	Area VIIdefg
2.7	Gill net vessels over 10m	10+	gill nets	none	none	none
2.8	Long line vessels over 10m	10+	long line	none	none	none
2.9	North Sea beam trawl over 300kW	10+	beam trawl	300+	none	Area IV
2.10	North Sea beam trawl under 300kW	10+	beam trawl	<300	none	Area IV
2.11	North Sea nephrops single-rig trawl over 10m	10+	single rig otter trawl	none	50%+ by value nephrops	Area IV
2.12	North Sea nephrops twin-rig trawl over 10m	10+	twin rig otter trawl	none	50%+ by value nephrops	Area IV
2.13	NSWOS demersal single-rig trawl over 24m	24+	single rig otter trawl	none	50%+ by value whitefish	Area IV and VI
2.14	NSWOS demersal pair seine/trawl over 10m	10+	pair seine or trawl	none	50%+ by value whitefish	Area IV and VI
2.15	NSWOS demersal seine netters over 10m	10+	seine	none	50%+ by value whitefish	Area IV and VI
2.16	NSWOS demersal twin-rig trawl over 10m	10+	twin rig otter trawl	none	50%+ by value whitefish	Area IV and VI
2.17	NSWOS demersal single-rig trawl under 24m, over 300kW	<24	single rig otter trawl	300+	50%+ by value whitefish	Area IV and VI
2.18	NSWOS demersal single-rig trawl under 24m, under 300kW	<24	single rig otter trawl	<300	50%+ by value whitefish	Area IV and VI
2.19	NSWOS scallop dredge over 10m	10+	scallop dredge	none	none	Area IV and VI
2.20	Pots and traps 10-12m	10-11.99	pots & traps	none	none	none
2.21	Pots and traps over 12m	12+	pots & traps	none	none	none
2.22	SW and English Channel beam trawl 221kW and under	10+	beam trawl	<221	none	Area VIIedfg
2.23	SW and English Channel beam trawl over 221kW	10+	beam trawl	221+	none	Area VIIedfg
2.24	Under 10m demersal trawl/seine	<10	otter traw/ seine	none	none	none
2.25	Under 10m mobile other	<10	beam trawl/long line	none	none	none
2.26	Under 10 passive other	<10	passive nets	none	none	none
2.27	Under 10m pots and traps	<10	pots & traps	none	none	none
2.28	West of Scotland nephrops single-rig trawl over 10m	10+	single rig otter trawl	none	50%+ by value nephrops	Area VIa
2.29	West of Scotland nephrops twin-rig trawl over 10m	10+	twin rig otter trawl	none	50%+ by value nephrops	Area VIa
2.30	Pelagic over 40m	40+	pelagic trawl	none	50%+ by value pelagic	none
2.31	Miscellaneous	none	none	none	none	none
2.32	Low activity over 10m	10+	none	none	none	none
2.33	Low activity under 10m	<10	none	none	none	none

Seafish
18 Logie Mill
Logie Green Road
Edinburgh
EH7 4HS

T: +44 (0)131 558 3331
www.seafish.org

SEAFISH
the authority on seafood