



SEAFISH INSHORE FISHERIES PROJECT

WP5. Improving market intelligence and fishery production co-ordination in Scottish Inshore Fisheries – a pilot study

Name of contractor: Nautilus Consultants (in association with Hambrey Consulting)

Start date of project: 30th June 2014

End date of project: 15th July 2015



Aims and objectives:

This study describes how the activities and income of inshore fishermen are subject to market related constraints, and explores means of addressing and/or removing such constraints through:

- **Product opportunities:** Summarising information on current inshore catch and landings while assessing the potential for landing other species or changes in species mix;
- **Market demand:** Development of a better understanding of actual and potential demand for inshore fishery products, primarily in local, but also wider markets;
- **Improved information exchange:** Piloting and facilitating improved exchange of production and market information, at both local and national levels, including identification of innovative trade cooperation models and wider utilisation of information technologies, to the benefit of both producers and traders/consumers.

Case study work was focused on the Isle of Skye and Lochalsh, and by extension on product transiting from the Western Isles onto Skye and the Wester-Ross area (Ullapool). Field studies also included Moray (E. coast), from Burghead to Gardenstown.

Approaches:

The study focused on the west coast and islands due to their economic and geographic 'peripherality' (e.g. their distance from major trunk roads and infrastructure) which places them at a disadvantage in the market place. The east coast study area was included to obtain a balanced view, and provide a comparison to the west.

The researchers worked closely with two to three fishing communities in each area, taking forward issues informed by their experience and needs, and supported by quantitative and qualitative data.

The project was undertaken in four stages:

1. The value of inshore landings around Scotland, vessel numbers, location of major 'seafood hubs' and key distribution routes were assessed using available statistics
2. Local meetings were held with fishermen and industry representatives to identify their main supply-chain issues (e.g. linkage between producers, distribution logistics and consumers)
3. Case study areas were identified to explore supply-chain issues in greater detail, facilitated through one-to-one and focus-group meetings with fishermen and industry
4. Solutions were then proposed for the various issues identified



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Contact details

All general enquiries about the project should be directed to the MASTS Project Manager – Dr John Thompson at: jb5@st-andrews.ac.uk

More detailed inquiries with respect to individual work packages should be directed to the Project Facilitators:

Dr Kyla K. Orr

T 01599 – 544 739
M 07502 – 329 058
E kylaorr@gmail.com

Ali McKnight (MCIEEM)

T 01540 – 662 083
M 07713 – 333 166
E alimcknight@agroecosystems.co.uk

Freephone
0800 043 3474

Weblink

www.seafish.org/research-economics/evidence-gathering-in-support-of-sustainable-scottish-inshore-fisheries

Funders and partners



Results / key conclusions and recommendation:

Value of Scottish 'Inshore' Fisheries (operating within 6nm):

£91M of Scottish landings were caught within the IFG areas (excluding Shetland) in 2013 – amounting to 28% of total landings in Scotland. Of which:

- The >10m fleet landed two-thirds (£55M), and the <10m fleet landed one-third (£33M)
- 54% was from Nephrops, 14% from scallop, 10% from lobster, and 8% from edible crab
- 57% of landed value was from mobile gear, and 43% from static gear

Key issues:

Inshore landings are over-dependent on shellfish, the majority of which is distributed to elsewhere in the UK or exported to Europe, and the inshore sector lacks sufficient quota to diversify catch to fish species. Overall fishermen get a fair price for their product, but they could do better by exploiting local markets. In addition, trading in live shellfish to the overseas market is high risk, and most businesses have suffered at least one significant payment default. Much more local seafood could be sold to visitors and tourists, however, it is currently difficult for visitors to source local catch, and caterers are not well informed of local availability of shellfish or how best to prepare and present it. Although selling more catch locally could increase the resilience of inshore fishermen and add value to their product, it is not always the easy option because of the mismatch between local demand and supply of shellfish; insufficient (small-scale) holding/storage facilities; the short tourist season, and; the extra time and entrepreneurial skills required by individual fishermen.

Solutions:

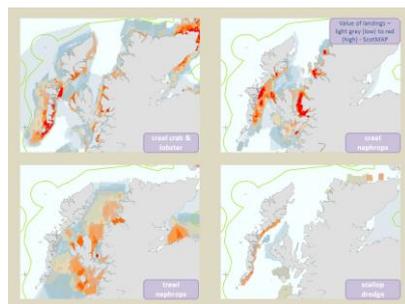
The following could help fishermen add value to their catch and increase their resilience:

- Wider use of shore-based live shellfish holding facilities (e.g. recirculation systems),
- More space for fishermen to store gear and other equipment,
- Better information to caterers and visitors on how and where to source local seafood, and on how to improve their menu design and delivery,
- Encouraging establishment of more fish smokehouses, and mobile catering units, which offer great local branding opportunities and respond to needs of local caterers and tourists,
- Having the right (managed risk) business model when supplying live product to overseas markets (Spain, Portugal, France),
- Training for fishermen in business planning and entrepreneurial skills, thereby empowering them to participate as investors / owners of businesses downstream from fishing.

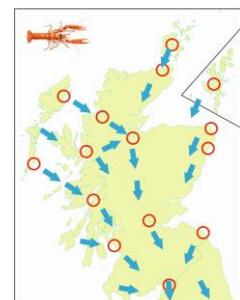
Improving value of catch (success stories)

Almost all the successes seen have occurred where fishermen or others have added value to their core business through various entrepreneurial endeavors, such as:

- a skipper / owner selling his and others' product,
- a skipper / owner's partner running a café / retail outlet using at least some own product;
- a skipper / owner also running a mobile catering unit selling at least some own product,
- a local buyer selling retail as well as wholesale,
- a local buyer also processing / smoking,
- a skipper / owner increasing the scale of their business by buying a second or third boat and/or investing in live holding facilities



Value of landings - light grey (low) to red (high)
ScotMAP



The majority of inshore landings (shellfish) are distributed to elsewhere in the UK and Europe