



SOCIAL AND ECONOMIC SUSTAINABILITY

POLICY BRIEF NO. 4 - JUNE 2020

OVERVIEW

- In the UK, fishing is an economically small industry in terms of direct GDP but has a large cultural and community impact.
- Fishing is a unique industry because it relies on a public, uncertain resource.
- Many fishing communities have higher rates of deprivation than other communities.
- Fishers often have little financial resilience and a fluctuating income, and long-term planning can be challenging.
- Seafood processing is more economically significant than fishing but does not have as much public influence.
- Changes to policy, investment and outreach efforts could help improve the industry's socioeconomic standing.

BACKGROUND

The UK fishing fleet comprises over 4,500 vessels, of which the majority are under 10m in length (1). In 2018, landings brought £978 million into the UK economy, although well over half of this was brought in by a relatively low number of vessels over 24m in length (1). How this income translates into supporting fishing communities is a complex matter, addressed in this briefing.

The two main economic drivers for the fishing industry are sales prices and fuel costs, with quota allocation and availability also holding significant influence.

The fishing industry employs around 12,000 people, or about 7,200 in terms of full-time equivalent roles (1). Scotland contains half of these, as Scotland has many larger vessels that spend more time at sea.

This briefing summarises the output from the APPG on Fisheries open Parliamentary seminar, 25 February 2020. The meeting brought together stakeholders from across the sector and across the UK. Seafood industry experts, educators and consultants, and charity and advisory body representatives met to discuss socioeconomic challenges and how to overcome barriers to a socially and economically sustainable industry. This document is a synthesis of the discussions that took place both at the event and online (via #FishingSocioeconomics).

While fishing itself contributes only around 0.03% of GDP (2), because it is a primary industry, it can have a positive knock-on effect on other industries, especially within coastal communities (3). It also has a strong cultural impact, arguably the principal reason it rose to prominence in Brexit negotiations. Fishing communities face a number of unique social and economic challenges.

These can include fluctuating income, unsociable working hours and risks to health and safety. These factors, and others, can be reflected in the welfare of entire coastal communities. A substantial number of fishing communities suffer from socioeconomic deprivation (4, 5).

CHALLENGES

Share fishermen make up the majority of the catch sector. Their income solely depends on the catch landed, and so can fluctuate significantly due to factors beyond their control.

Ports are more than twice as likely to be deprived compared to the average UK community (4). This is true even with ports with significant levels of activity, and deprivation is more apparent in Wales and England than in Scotland. One factor that may disadvantage English and Welsh ports over others is the lack of port infrastructure; for instance, it was suggested that English ports are generally not suitable for vessels with a large berth, meaning these vessels must land catches elsewhere (6).

There is some evidence that fishers face challenges accessing complex financial support (such as formal grant schemes), in part due to lower-than-average levels of literacy among fishing communities (4, 7), as well as the financial restrictions imposed by unpredictable incomes (7). Challenges also include access to mainstream credit or welfare benefits, which means that a

spate of bad weather or high fuel prices, which restrict fishing activity, can be crippling.

As a resource, fish stocks are finite, public, shared, uncertain and increasingly politicised (8). The nature of fish stocks makes fishing a difficult industry to manage and, in turn, changes in management can be challenging for the fishing industry to respond to.

Over several decades, the trade in fishing quota within the UK has resulted in a substantial portion of total quota being owned by relatively few individuals or organisations (8). This raises questions about whether stocks are still a public resource, and whether the revenue earned by the fishing fleet is fairly distributed amongst its members.

Proposed changes to monitoring and surveillance could have positive or negative effects on fishing communities' socioeconomic wellbeing. There are fears that proposed changes such as recording catch weights could lead to a greater administrative load on fishers, leading to them working for longer hours without compensation. However, there are anecdotal reports from some skippers that some monitoring measures, namely CCTV onboard vessels, have been useful and have improved safety (6).



WAYS FORWARD

Direct Assistance

Opportunities designed to ease the financial difficulties of fishermen, such as the recently-ended HMRC Share Fishermen Scheme, were not taken up by much of the industry (5).

It is recommended that future opportunities are communicated more clearly, and are not subject to onerous paperwork, to ensure they fulfil their intended function (4). Supplementary financial assistance, such as loans for vessel purchasing or training support, could lead to an economic boost and help usher in new recruits (7). Investment into making ports more accessible and efficient, such as via the new Maritime and Fisheries Fund, would also be of socioeconomic benefit.

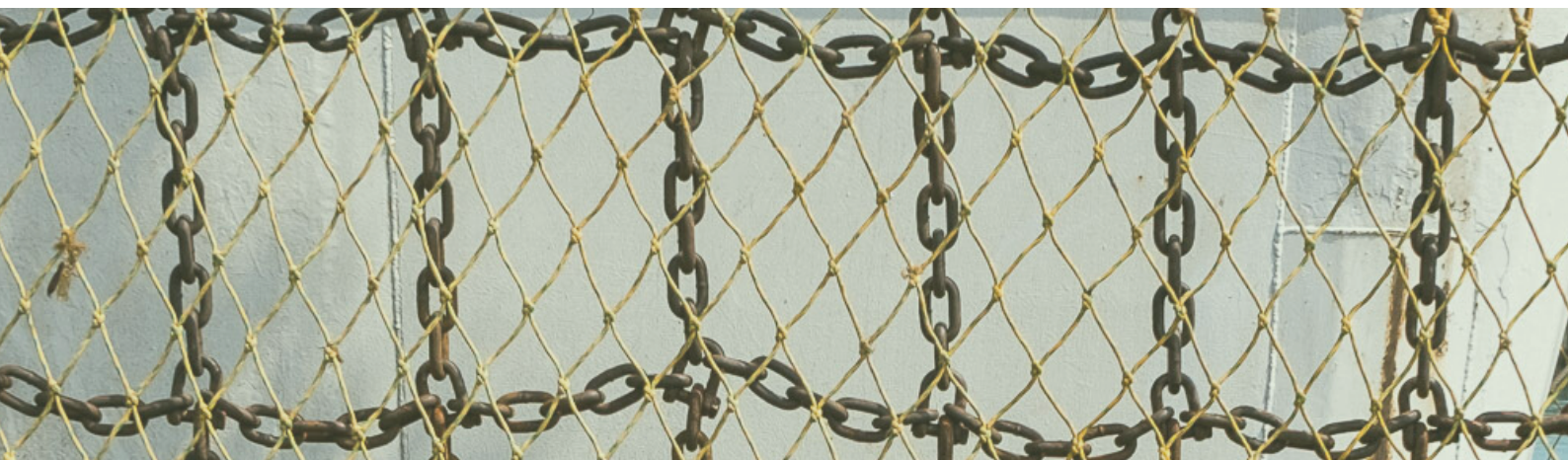
A number of non-governmental organisations support the industry in various ways. One example is the Seafarers Advice and Information Line (SAIL) (4), which can offer specialised advice for debt and other issues such as housing. The Fishermen's Mission can also offer financial support, and the Seafarers' Hospital Society can offer grants to individuals for health and welfare (9). The Fishing Amateur programme fulfils a similar role to SAIL but focuses on business support, connecting fishers with practical assistance in the form of guidance around applying for government grants, for instance (10).

All these organisations become especially pertinent during times of individual or collective financial pressure.

Indirect Assistance

Changes to quota allocation, especially when coupled with potential Total Allowable Catch (TAC) gains post-Brexit, could lead to a greater and more even quota distribution that would potentially support smaller vessels as well as larger ones – but only if done carefully and with scientific advice in mind (11). International agreement will continue to be necessary – the international management tools in place are already aiding fish stocks in many areas (12), and further streamlining efforts can make stocks a more stable financial certainty for fishermen into the future.

Encouraging consumption of UK-caught catch within the UK could also potentially make fishermen's income more stable. As currently the majority of catches are exported (almost 65% in 2018) (13), fishers are reliant on foreign markets, exchange rate fluctuations, and border legislation. Efforts such as the 'Sea For Yourself' campaign are accelerating a transition to greater consumption of UK-caught seafood (14). While changing people's habits tends to be a slow and gradual process, case studies, such as increasing UK consumption of hake caught off the Cornish coast (15), point to changing trends.





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SUMMARY

The fishing industry faces a number of challenges to its socioeconomic wellbeing. These include low and unstable incomes, complex regulations, and uncertain catches. Coupled with a rapidly changing national and global landscape, this means that effective solutions are needed. Tried-and-tested methods, used in conjunction with new innovative ways to aid the fishing industry, can fulfil this. These include direct assistance through financial and welfare support, and indirect assistance via changes to quota allocation and encouraging consumption of UK-caught fish. Joined-up thinking and communication across sectors is necessary to ensure these are utilised in the best possible way.

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