

A National Statistics Publication for Scotland



**Scottish Sea
Fisheries
Statistics
2008**



**natural
scotland**
SCOTTISH GOVERNMENT

Scottish Sea Fisheries Statistics, 2008

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1. Overview of the Scottish Fishing Fleet

1.1 The regulation of the UK Fleet

The structure and capacity of the UK and Scottish fishing fleets has, since 1983, been dictated primarily by the EU Common Fisheries Policy (CFP). Between 1997 and 2002, fleet structure was managed within the CFP through the fourth Multi Annual Guidance Programme (MAGP) designed to tailor fleet capacity to available fish stocks across the EU. Under this programme, the UK fishing fleet was divided into eight segments, defined primarily by broad fishing method¹, and capacity limits or effort reduction targets set for each segment. MAGP IV has now ended and has been replaced by global effort ceilings at member state level controlled through a system of entry/exit controls. In simple terms, a vessel can only enter the fleet when equivalent capacity has exited the fleet.

At a UK level to date, restrictive licensing has been the main Government instrument to bring the activities of the UK fishing fleet into line with MAGP and UK aims on fleet and catch management. Aside from a few limited exceptions, all vessels engaged in commercial sea fishing are required to hold a licence issued by UK Fisheries Departments. There are a finite number of licences in existence and no new licences are made available. This places a ceiling on the total number of vessels in the UK fishing fleet. In order to licence new vessels, fishermen must acquire one or more existing licences from other previously licensed vessels. Capacity penalties are applied when licences are transferred, or aggregated to form a larger licence unit, and these, together with the restricted number of licences on issue, form a mechanism resulting in reductions in the capacity of the UK fleet.

The UK restrictive licensing controls, in combination with successive decommissioning schemes (1994-1997; 2001-2002 and 2003-2004) designed to conserve vulnerable whitefish stocks, particularly cod, explain many of the fleet trends in recent years. Two successive decommissioning schemes in 2001-2002 and 2003-04, removed 165 vessels from the fleet.

1.2 Fleet size

There were 2,205 active fishing vessels based in Scotland at the end of 2008, a net increase of 14 (1 per cent) since 2007 (Table 1). There were increases in the number of active vessels in 9 out of 18 districts (Table I below), with gains mainly in districts on the east coast.

¹ Pelagic Gears; Beam trawl; Demersal seines and nephrops; Lines & Nets; Shellfish-Mobile; Shellfish-Fixed; Distant Water; and vessels under 10 metres.

Table 1: Changes in numbers of active Scottish based vessels 2007-08, by district.

District	Number of active vessels		Change
	2007	2008	
Eyemouth	100	95	-5
Pittenweem	108	120	12
Aberdeen	92	92	0
Peterhead	104	107	3
Fraserburgh	214	226	12
Buckie	78	87	9
Wick	128	129	1
Orkney	155	150	-5
Shetland	177	182	5
Stornoway	281	267	-14
Lochinver	15	15	0
Kinlochbervie	25	23	-2
Ullapool	69	85	16
Mallaig	69	65	-4
Oban	129	123	-6
Campbeltown	155	137	-18
Ayr	153	157	4
Portree	139	145	6
Total	2,191	2,205	14

Source: Table 6 and equivalent 2007 figures.

From 1998 to 2004, the number of vessels in the Scottish under 10m fleet remained fairly steady at around 1,600. From 2004 to 2008, the number decreased by 103 to 1,492. The over 10 metres fleet is now 25 per cent smaller than in 2000, before the decommissioning schemes in 2001-02 and 2003-04. This segment grew by 16 vessels (2 per cent) between 2007 and 2008 to 713, due to the increase in the number of shellfish boats from 381 to 397.

1.3 Vessel Capacity

1.3.1 Engine Power

Engine power statistics in earlier years have been underestimated to an unknown degree, due to the inclusion of vessels with engines operating at a higher power than permitted on their licences. In November 1999, in response to this problem, Fisheries Departments introduced special (concessionary) licensing arrangements and a timetable for compliance with engine power controls. Under the compliance timetable licence holders who have admitted to under declaration, had until the end of 2004 to ensure that either: (i) their true engine power is registered and to have acquired enough licence entitlement to cover this, or (ii) to have derated their engine to the figure on their licence. In practice, most have chosen to acquire extra licences to cover their operational engine power. Consequently, it needs to be borne in mind that, after 1999, the trends in average engine power shown in Table 1 are complicated by the effect of an increasing number of owners declaring their true, higher, engine power. Nevertheless, while this bias makes the actual rate of change unclear, it is clear that Scottish based vessels are now fishing with greater engine power on average than in the past.

The total registered engine power of the over 10m Scottish fleet was 342 thousand kilowatts in 2008 (Table 1), 6 per cent higher than in 2007 but 9 per cent lower than in 1998. Average engine power per vessel, at 480 kW, has increased by 4 percent in 2008 and by 31 per cent since 1998. The opposing trends of decreasing total fleet engine capacity and increasing average engine power can be explained by a combination of factors: (i) the 31 per cent reduction in the number of vessels in the over 10 m fleet since 1998 (Table 4); (ii) the “natural wastage” of licensed engine power that often accompanies the aggregation of several licences onto a single vessel² and; (iii) since 1999, the progressive correction of under declared engine power, in line with the concessionary licensing arrangements noted above.

1.3.2 Effort by the Scottish fleet

In the years before 2009, EU regulations set limits on the numbers of days at sea in the cod recovery zone for fishing vessels of 10 metres and over, when using certain types of regulated gear. Fisheries administrations monitor effort uptake by vessels using regulated fishing gears in and around the cod recovery zone.

² Occurs when the sum of the engine power capacities attached to the licences used in an aggregation, exceeds the maximum engine power of the vessel on which the aggregate licence is used. The excess engine power entitlement is then effectively lost from the fleet total.

Effort in the cod recovery zone by the Scottish over 10 metre fleet using whitefish gear dropped substantially between 2000 to 2004 (Table 10), reflecting the reduction in fleet capacity resulting from the decommissioning schemes in 2001-02 and 2003-04. Over this period, whitefish effort dropped by 62 per cent in the North Sea and by 40 per cent in the West of Scotland. From 2004 to 2007, effort continued to decline, albeit less rapidly. In 2008, whitefish effort by the Scottish over 10 metre fleet stood at 12.2 million kWdays in the North Sea, an increase of 1.2 million kWdays (10 per cent) compared to 2007, and stood at 2.0 million kWdays in the West of Scotland, at around the same level as the 2007 effort.

Effort in the cod recovery zone by the Scottish over 10 metre fleet using *Nephrops* gear stood at 9.2 million kWdays in the North Sea and 4.8 million kWdays in the West of Scotland in 2008. This is an increase of 0.3 million kWdays (3 per cent) in the North Sea and an increase of 0.1 million kWdays (2 per cent) in the West of Scotland compared to 2007. Looking at the longer term trends, *Nephrops* effort in the North Sea more than doubled between 2000 and 2003, increasing by 5.1 million kWdays (106 per cent) but has remained roughly stable afterwards. In the West of Scotland, *Nephrops* effort has been roughly stable since 2000.

Effort in 2008 by the Scottish over 10 metre fleet in the North Sea and West of Scotland areas of the cod recovery zone is dominated by whitefish (46 per cent) and *Nephrops* (46 per cent) gears. In 2000, whitefish gears accounted for 73 per cent of total effort and *Nephrops* gears accounted for 17 per cent. This reflects the long term trend of decreasing whitefish effort; and increasing and then stabilising *Nephrops* effort.

1.4 Employment

The 2005 employment figures were revised in the 2006 bulletin because they were affected by an understatement in the figures recorded by Peterhead Fisheries Office. The 2005 figures for Peterhead have been estimated as being the same as the 2006 figures.

Total employment in the catching sector increased from 5,424 to 5,448 in 2008 (Table 11), an increase of under 1 per cent compared with 2007. The number of fishermen regularly employed on Scottish based vessels in 2008, at 4,585, was 4 per cent higher than in 2007 (Table 13). The number of irregularly employed fishermen decreased in 2008 by 15 per cent to 807.

At a district level, the largest increases in the recorded numbers in employment occurred at Fraserburgh (+55 jobs) and Oban (+45 jobs), while the largest decreases in the recorded numbers in employment occurred at Orkney (-60 jobs) and Shetland (-53 jobs). Fraserburgh has the most fishermen in regular and total employment.

Table 1. Active⁽¹⁾ Scottish based vessels and power, by overall length group, 31st December 1998 to 2008

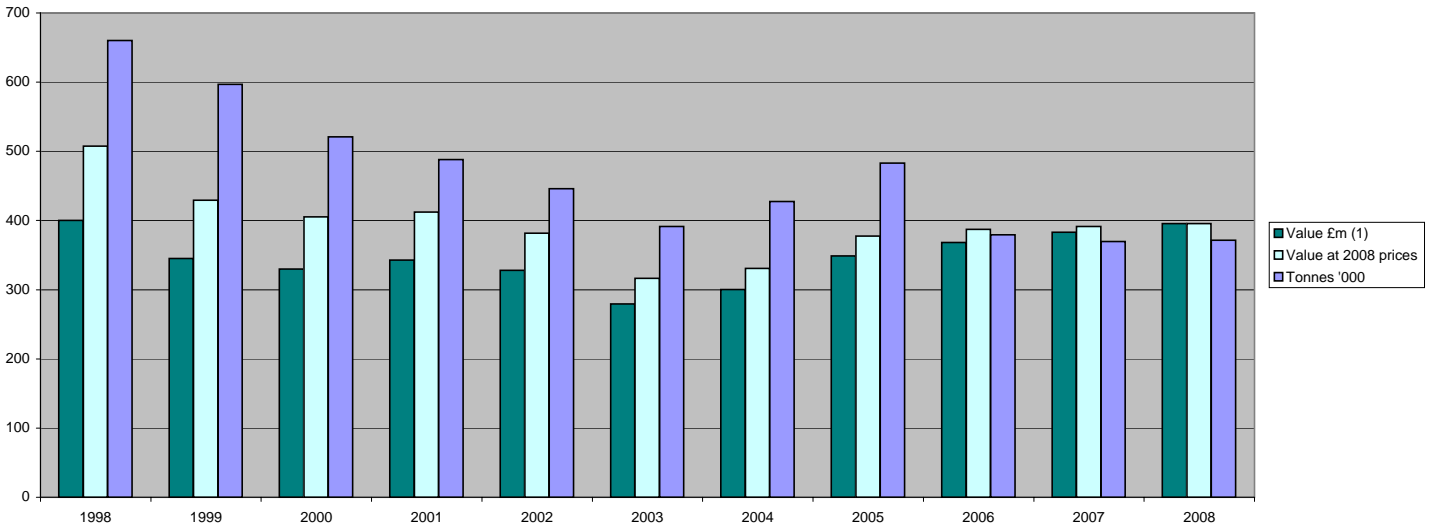
		10 metres	>10 <15	15<20	20<25	25<30	30<35	35 metres	Total	Over 10 metres	
		& under	metres	metres	metres	metres	metres	& over		Number	Average ⁽²⁾
Number	1998 (r)	1,605	315	274	226	130	17	64	2,631	1,026	20.17
	1999 (r)	1,584	297	263	208	128	19	64	2,563	979	20.33
	2000 (r)	1,593	286	253	199	125	22	64	2,542	949	20.50
	2001 (r)	1,604	280	259	202	118	23	62	2,548	944	20.52
	2002 (r)	1,615	274	235	148	91	18	62	2,443	828	20.18
	2003 (r)	1,588	270	223	117	66	16	57	2,337	749	19.90
	2004 (r)	1,595	269	212	113	64	17	55	2,325	730	19.92
	2005 (r)	1,567	270	204	112	61	15	57	2,286	719	19.92
	2006 (r)	1,518	273	193	110	61	16	53	2,224	706	19.73
	2007	1,494	273	187	109	59	15	54	2,191	697	19.74
	2008	1,492	266	191	111	66	19	60	2,205	713	20.20
										Power	Average
Total power (kW)	1998 (r)	70,085	37,815	63,640	90,502	69,356	12,781	100,966	445,146	375,061	365.56
	1999 (r)	71,120	35,734	61,524	83,593	69,632	15,002	102,209	438,814	367,694	375.58
	2000 (r)	76,082	34,878	60,289	82,024	69,701	17,601	106,798	447,373	371,291	391.24
	2001 (r)	79,189	35,055	64,844	85,258	66,966	19,362	120,971	471,644	392,455	415.74
	2002 (r)	80,489	35,146	60,512	65,161	53,578	14,093	128,010	436,989	356,499	430.55
	2003 (r)	80,652	35,976	58,113	52,524	38,883	13,215	141,665	421,028	340,376	454.44
	2004 (r)	81,562	36,811	55,675	50,857	37,618	13,886	147,841	424,250	342,688	469.44
	2005 (r)	82,073	37,413	54,694	50,324	35,466	11,854	148,895	420,718	338,645	470.99
	2006	80,131	38,201	51,802	49,751	35,440	13,174	135,966	404,464	324,334	459.40
	2007	78,753	38,698	51,316	49,296	34,431	11,719	137,190	401,402	322,650	462.91
	2008	78,692	38,422	53,320	50,510	38,044	13,203	148,558	420,749	342,057	479.74

Scottish based vessels are those licensed at a Scottish port; Scottish registered vessels are those registered at a Scottish port on the Register of Shipping and Seamen. From the beginning of 1993 there was a requirement that all 10 metres and under vessels should be licensed.

⁽¹⁾ During 2006, it was discovered that the UK Core Vessel file, the official source of information on UK vessels, had been notified of Scottish vessels becoming inactive while they were still recorded on FIN as active. An exercise was conducted to take this information on board into FIN, leading to an appreciable drop in the number of active vessels recorded. Because this issue affected the figures for earlier years, figures have been revised.

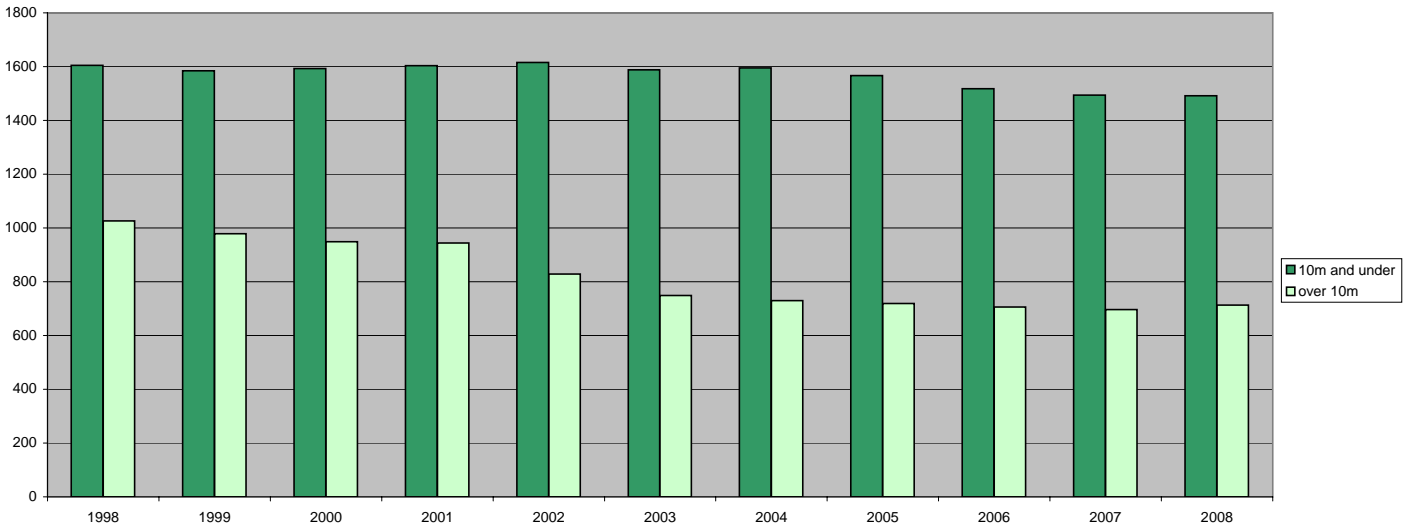
⁽²⁾ Vessel average length figures have been re-calculated retrospectively.

Chart 1. Landings by Scottish based vessels, 1998 to 2008



(1) When the Register of Buyers and Sellers (RBS) was introduced in September 2005, Sales Notes were not initially required for sales of shellfish and information on the value of such landings is consequently missing. The value has therefore been estimated for a number of landings, mostly shellfish, relating to voyages starting on or after 1 September 2005.

Chart 2. Active⁽¹⁾ Scottish based vessels, 1998 to 2008



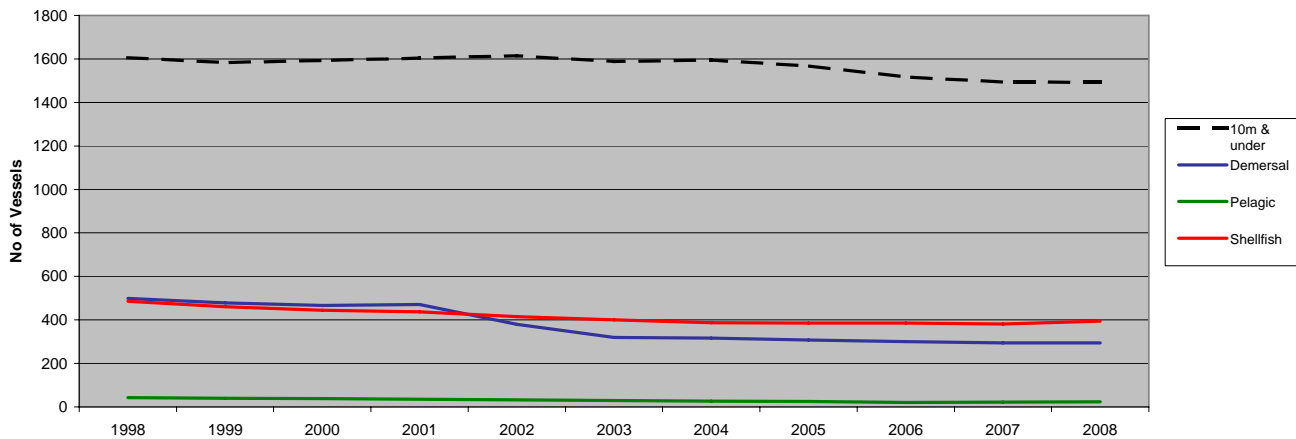
⁽¹⁾ See footnote to Table 1

Table 2. Active Scottish based vessels, tonnage and power by overall length group and age group, 31st December 2008

	10 metres & under	>10 <15 metres	15<20 metres	20<25 metres	25<30 metres	30<35 metres	35 metres & over	Total	Over 10 metres
Number									
Under 10 years	226	25	31	17	8	2	21	330	104
10<15	97	15	9	14	9	2	8	154	57
15<20	236	47	11	13	10	2	4	323	87
20<25	206	48	22	33	18	1	5	333	127
25<30	190	41	21	13	6	2	3	276	86
30<35	118	21	27	11	6	2	6	191	73
35 years & over	171	53	68	9	8	6	8	323	152
Not known	248	16	2	1	1	2	5	275	27
Total	1,492	266	191	111	66	19	60	2,205	713
Average age (years)	22.6	25.0	27.3	21.4	21.9	27.4	19.0	23.2	24.3
Total tonnage									
Under 10 years	981	564	4,546	3,901	2,898	929	37,225	51,044	50,063
10<15	388	267	1,004	2,846	3,127	1,060	8,712	17,404	17,016
15<20	850	745	998	2,319	2,465	587	2,155	10,119	9,269
20<25	701	824	2,466	5,598	4,194	375	2,356	16,515	15,813
25<30	739	643	1,818	1,880	1,118	466	1,196	7,859	7,121
30<35	467	281	1,677	1,412	1,020	569	2,101	7,527	7,060
35 years & over	627	822	3,302	963	1,223	1,293	2,641	10,870	10,244
Not known	662	224	324	158	209	460	2,748	4,785	4,123
Total	5,414	4,370	16,136	19,077	16,253	5,739	59,134	126,124	120,709
Average tonnage	4	16	84	172	246	302	986	57	169
Total power (kW)									
Under 10 years	17,843	6,186	12,768	10,113	6,494	2,070	94,752	150,225	132,383
10<15	7,878	2,782	2,723	8,141	6,189	1,873	21,746	51,332	43,454
15<20	13,523	7,489	3,532	5,862	5,277	1,631	5,992	43,306	29,783
20<25	9,679	6,848	6,737	13,512	9,708	855	6,169	53,507	43,828
25<30	9,091	4,947	6,446	5,452	3,025	1,252	4,752	34,966	25,874
30<35	5,492	2,214	6,307	4,092	3,145	1,287	4,945	27,480	21,989
35 years & over	5,506	5,639	13,880	2,937	3,758	3,192	5,058	39,971	34,465
Not known	9,680	2,317	927	402	448	1,043	5,144	19,961	10,282
Total	78,692	38,422	53,320	50,510	38,044	13,203	148,558	420,749	342,057
Average power	53	144	279	455	576	695	2,476	191	480

Year on year tonnage comparisons should be made with caution, since these figures take no account of the phased replacement of GRT with GT during the period 1996-2003.

Chart 3. Scottish based vessels by type, 1998 to 2008



From the beginning of 1993 there was a requirement that all 10 metres and under vessels should be licensed.

Table 3. Active Scottish based vessels: number, tonnage and power by overall length group, 31st December 2008

Length	Tonnes	Vessels	Total tonnes
10m & under	<40	1,492	5,414
>10 <15	<40	260	4,110
	40<60	6	261
	Total	266	4,370
15<20	<40	20	717
	40<60	56	2,690
	60<80	30	2,067
	80<100	20	1,787
	100<150	45	5,457
	150<200	20	3,418
	Total	191	16,136
20<25	40<60	1	57
	60<80	1	72
	80<100	5	447
	100<150	33	4,419
	150<200	47	8,199
	200<300	20	4,617
	300<500	4	1,266
	Total	111	19,077
25<30	100<150	5	643
	150<200	14	2,407
	200<300	30	7,066
	300<500	17	6,138
	Total	66	16,253
30<35	150<200	3	555
	200<300	9	2,135
	300<500	4	1,385
	Over 500	3	1,664
		Total	19
35 & over	200<300	5	1,426
	300<500	25	9,670
	Over 500	30	48,038
	Total	60	59,134
Total	Under 40	1,772	10,241
	40<60	63	3,008
	60<80	31	2,139
	80<100	25	2,234
	100<150	83	10,518
	150<200	84	14,579
	200<300	64	15,244
	300<500	50	18,459
	Over 500	33	49,702
		Total	2,205

Length	kW	Vessels	Total power	
10m & under	<40	796	14,679	
	40<75	326	18,156	
	75<150	287	29,417	
	150<225	66	11,999	
	225<375	17	4,441	
	Total	1,492	78,692	
>10<15	<40	1	36	
	40<75	25	1,580	
	75<150	147	16,000	
	150<225	60	11,244	
	225<375	29	7,738	
	375<550	4	1,825	
	Total	266	38,422	
15<20	75<150	15	1,940	
	150<225	55	10,553	
	225<375	88	26,199	
	375<550	32	14,009	
	550<750	1	620	
	Total	191	53,320	
20<25	150<225	1	221	
	225<375	34	11,555	
	375<550	56	25,443	
	550<750	19	12,429	
	Over 750	1	862	
	Total	111	50,510	
25<30	150<225	2	442	
	225<375	3	967	
	375<550	25	11,979	
	550<750	33	21,419	
	Over 750	3	3,237	
	Total	66	38,044	
30<35	375<550	6	2,838	
	550<750	8	5,355	
	Over 750	5	5,010	
		Total	19	13,203
35 & over	375<550	4	2,006	
	550<750	15	10,026	
	Over 750	41	136,526	
	Total	60	148,558	
Total	Under 40	797	14,714	
	40<75	351	19,736	
	75<150	449	47,357	
	150<225	184	34,458	
	225<375	171	50,900	
	375<550	127	58,100	
	550<750	76	49,849	
	Over 750	50	145,635	
		Total	2,205	420,749

Year on year tonnage comparisons should be made with caution, since these figures take no account of the phased replacement of GRT with GT during the period 1996-2003.

Table 4. Active⁽¹⁾ Scottish based vessels by main fishing method, 31st December 1998 to 2008

	10m & under				Over 10m										Total	Total		
	Nephrops trawl	Creel fishing	Other	Total	Pelagic				Demersal				Shellfish					
					Purse seine	Pelagic trawl	Other	Total	Trawl	Seine	Lines	Other	Total	Nephrops trawl			Other	Total
1998 (r)	66	1,417	122	1,605	25	17	-	42	384	96	5	14	499	249	236	485	1,026	2,631
1999 (r)	73	1,391	120	1,584	21	19	-	40	374	87	4	14	479	237	223	460	979	2,563
2000 (r)	88	1,383	122	1,593	18	20	-	38	366	85	4	11	466	223	222	445	949	2,542
2001 (r)	94	1,390	120	1,604	10	26	-	36	378	79	5	9	471	221	216	437	944	2,548
2002 (r)	94	1,399	122	1,615	9	24	-	33	319	44	6	11	380	204	211	415	828	2,443
2003 (r)	99	1,371	118	1,588	8	21	-	29	272	33	4	11	320	193	207	400	749	2,337
2004 (r)	103	1,371	121	1,595	6	20	-	26	265	33	9	10	317	181	206	387	730	2,325
2005 (r)	100	1,347	120	1,567	6	19	-	25	255	34	9	10	308	177	209	386	719	2,286
2006	98	1,299	121	1,518	5	16	-	21	247	33	10	10	300	171	214	385	706	2,224
2007	95	1,292	107	1,494	5	17	-	22	241	35	9	9	294	172	209	381	697	2,191
2008	86	1,296	110	1,492	4	20	-	24	234	35	14	12	295	188	206	394	713	2,205

From the beginning of 1993 there was a requirement that all 10 metres and under vessels should be licensed.

⁽¹⁾ See footnote to Table 1

Table 5. Active Scottish based vessels, by main fishing method and overall length group, 31st December 2008

	10 metres & Under	>10 <15 metres	15<18 metres	18<25 metres	25<35 metres	35<50 metres	50 metres & over	Total
Demersal single trawl	19	17	25	90	34	14	-	199
Demersal pair trawl	-	-	3	12	8	1	-	24
Seine net	-	-	2	22	10	1	-	35
Lines	31	-	-	-	10	4	-	45
Demersal gill nets	8	2	-	-	3	4	-	17
Demersal twir/mult trawl	1	-	1	9	6	1	-	18
Beam trawl	1	1	-	1	3	8	-	14
Other demersal	-	-	-	1	-	2	-	3
Demersal total	60	20	31	135	74	35	-	355
Purse seine	-	-	-	-	-	1	3	4
Pelagic trawl	-	-	-	-	-	-	20	20
Other pelagic	-	-	-	-	-	-	-	-
Pelagic total	0	0	0	0	-	1	23	24
Creel fishing	1,296	113	6	3	-	-	-	1,418
Nephrops trawl	86	102	54	30	2	-	-	274
Mechanical dredging	13	25	23	20	9	1	-	91
Suction dredging	1	2	-	-	-	-	-	3
Shell fishing by hand	36	4	-	-	-	-	-	40
Shellfish total	1,432	246	83	53	11	1	-	1,826
Total	1,492	266	114	188	85	37	23	2,205

Table 6. Active Scottish based vessels by base district and overall length group, 31st December 2008

	10 metres & Under	>10 <15 metres	15<18 metres	18<25 metres	25<35 metres	35<50 metres	50 metres & over	Total
Eyemouth	68	16	3	7	1	-	-	95
Pittenweem	100	16	2	2	-	-	-	120
Aberdeen	75	9	-	5	2	1	-	92
Peterhead	47	-	1	27	18	11	3	107
Fraserburgh	106	12	13	61	21	1	12	226
Buckie	48	5	3	24	5	2	-	87
Scrabster	110	12	2	3	2	-	-	129
Total east coast	554	70	24	129	49	15	15	856
Orkney	109	30	4	1	5	1	-	150
Shetland	134	17	2	17	5	-	7	182
Stornoway	209	33	20	4	-	-	1	267
Total Islands	452	80	26	22	10	1	8	599
Lochinver	12	1	-	2	-	-	-	15
Kinlochbervie	19	1	-	3	-	-	-	23
Ullapool	48	15	7	1	6	8	-	85
Mallaig	36	6	14	8	1	-	-	65
Oban	85	21	10	7	-	-	-	123
Campbeltown	86	32	16	3	-	-	-	137
Ayr	76	21	15	13	19	13	-	157
Portree	124	19	2	-	-	-	-	145
Total west coast	486	116	64	37	26	21	-	750
Total	1,492	266	114	188	85	37	23	2,205

A district is a geographical area within which there are a number of creeks or ports.

Table 7. Changes to the Scottish based, over 10 metres fleet, 31st December 2007 to 2008

	>10 <15 metres	15<20 metres	20<25 metres	25<30 metres	30<35 metres	35 metres & over
Active Scottish vessels, 31st December 2007	273	187	109	59	15	54
Continued to be based in Scotland	258	181	107	57	14	49
Transferred to another UK port	7	4	1	-	-	-
Became inactive	8	2	1	2	1	5
Transferred from another UK port	5	5	2	4	3	8
Became active	1	-	2	2	2	-
Newly built vessels	2	5	1	2	-	3
Change of vessel length category	-	-	-1	1	-	-
Active Scottish vessels, 31st December 2008	266	191	111	66	19	60

Table 8a. Scottish based sea fishing licences by category, 31st December 2006 to 2008

	Vessel licences				Entitlements				Total			
	Category A	Category B	Category C	<=10m	Category A	Category B	Category C	<=10m	Category A	Category B	Category C	<=10m
2006	559	85	62	1,518	47	1	7	117	606	86	69	1,635
2007	552	81	64	1,494	54	4	7	100	606	85	71	1,594
2008	566	80	67	1,492	47	2	5	73	613	67	72	1,565

In 2008, includes 24 pelagic licences (category A) on vessels.

Category A licences allow full access to all stocks available to UK vessels.

Category B licences allow only restricted access to some UK available stocks.

Category C licences further restrict the range of stocks that can be fished.

Table 8b. Scottish based sea fishing licences: vessel capacity units by type of licence, 31st December 2008

	On vessels				Entitlements				Total			
	Category A	Category B	Category C	<=10m	Category A	Category B	Category C	<=10m	Category A	Category B	Category C	<=10m
Pelagic licences	70,944	-	-	-	7,807	-	-	-	78,751	-	-	-
Other licences	166,072	9,081	10,618	66,964	10,957	120	434	1,355	177,029	9,081	11,052	68,319

Table 9. Scottish based, over 10 metres sea fishing licences, by category, 31st December 2007 to 2008

	On vessels			Entitlements		
	Category A	Category B	Category C	Category A	Category B	Category C
Scottish based licences, 31st December 2007	552	81	64	54	4	7
Remained on Scottish based vessels	526	78	62	27	2	4
Became Scottish entitlements	12	2	1	20	-	1
Transferred/aggregated to UK vessels	12	1	1	6	2	2
Other losses	2	-	-	1	-	-
Placed on vessel from Scottish entitlements	25	-	4	20	-	1
Transferred/aggregated from other UK ports	15	2	1	-	-	-
Scottish based licences, 31st December 2008	566	80	67	47	2	5

Table 10 : Effort of regulated gears in the Cod Recovery Zone in kwDays ('000) by Scottish based over 10 metre vessels by area and gear type, 2000 to 2008

	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Sea									
Whitefish gear	33,747	30,655	24,341	16,080	12,684	12,158	11,661	11,023	12,176
Nephrops gear	4,866	5,352	8,538	10,011	9,486	9,108	8,678	8,887	9,191
Industrial Trawl	-	4	-	6	5	2	-	12	-
Beam Trawl with mesh >= 120 mm	-	-	972	867	695	731	603	350	69
Beam Trawl with mesh >= 80 and < 120 mm	5,345	6,049	4,584	3,766	4,610	4,185	3,110	2,801	1,355
Gill Nets	32	63	47	197	197	166	294	321	417
Trammel Nets	-	-	-	-	-	-	-	-	-
Long Lines	78	89	104	57	4	-	8	1	277
West of Scotland									
Whitefish gear	7,453	8,523	7,566	5,723	4,502	2,635	2,100	1,986	1,990
Nephrops gear	5,065	4,903	4,797	5,761	5,335	4,586	4,381	4,692	4,804
Industrial Trawl	20	4	2	30	7	41	-	-	-
Beam Trawl with mesh >= 120 mm	5	-	-	60	151	120	81	2	-
Beam Trawl with mesh >= 80 and < 120 mm	98	85	104	-	-	-	-	-	-
Gill Nets	13	14	7	47	67	39	1	1	6
Trammel Nets	2	1	-	1	-	-	-	-	-
Long Lines	74	88	182	125	148	307	371	519	379
Irish Sea									
Whitefish gear	111	119	84	93	32	4	3	-	-
Nephrops gear	64	34	18	45	94	34	7	17	22
Industrial Trawl	-	-	-	-	-	-	-	-	-
Beam Trawl with mesh >= 120 mm	-	-	-	-	-	-	-	-	-
Beam Trawl with mesh >= 80 and < 120 mm	-	-	-	-	-	-	-	1	1
Gill Nets	-	-	-	-	-	1	-	-	-
Trammel Nets	-	-	-	-	-	-	-	-	-
Long Lines	-	13	-	3	-	-	-	-	-

Chart 4. Effort of selected regulated gears in the Cod Recovery Zone in kwDays ('000) by Scottish based over 10 metre vessels by area and gear type, 2000 to 2008

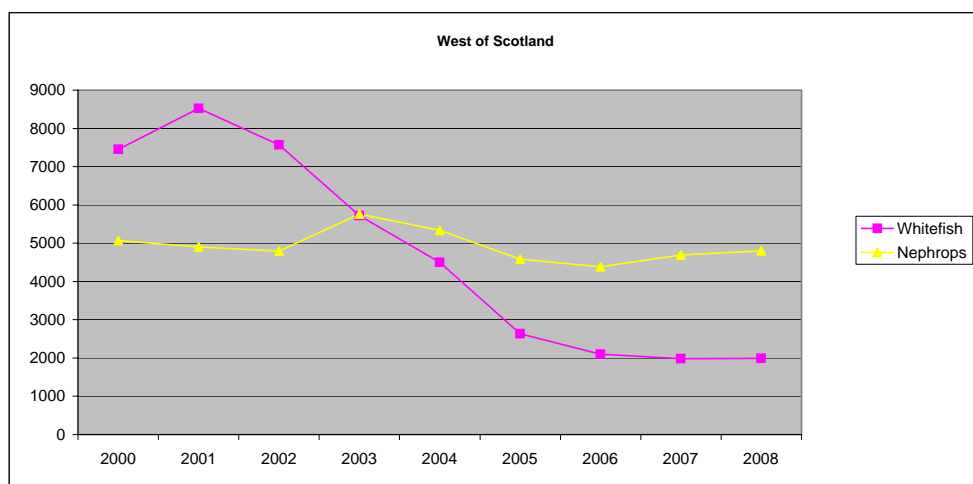
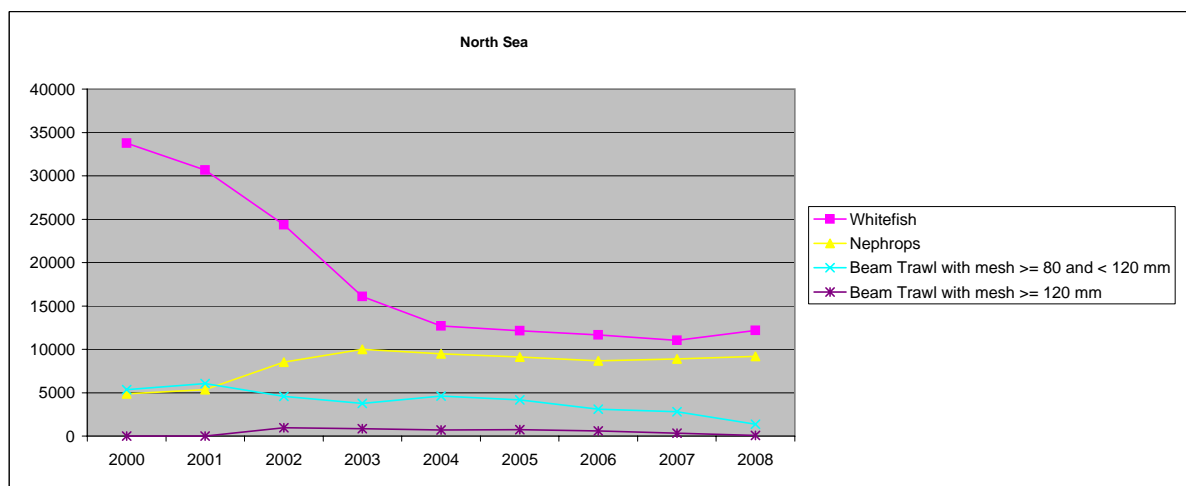


Table 11. Employment in sea fishing and Scottish labour force, 2001 to 2008

	2001	2002	2003	2004	2005 (r)	2006	2007	2008
Total employed in the catching sector	6,637	5,707	5,276	5,275	5,155	5,205	5,424	5,448
Total labour force ('000)	2,339	2,358	2,380	2,429	2,451	2,498	2,521	2,529
Employment in fishing as % of labour force	0.3	0.2	0.2	0.2	0.2	0.2	0.2	0.2

Source : Total Labour Force data - 2004-2008: Annual Population Survey (Jan-Dec); 2000-2003: Annual Labour Force Survey (Mar-Feb); Marine Scotland Compliance

In 2005 Peterhead's employment figures were under-recorded. Their figures for 2005 have now been estimated as being the same as in 2006.

Table 12. Value of sea fish landings into Scotland by Scottish based vessels; fishermen employed, by selected region, 2008

Region	Landings (1)	Labour	Fishermen	As %
	2008	force (2)	employed	labour force
Eilean Siar, Orkney & Shetland	75.7	36	1,340	3.72
Aberdeenshire	143.2	128	1,411	1.10
Angus	1.2	54	61	0.11
Argyll & Bute	20.1	44	513	1.17
City of Aberdeen	6.3	113	45	0.04
City of Edinburgh	0.1	251	5	0.00
Dumfries and Galloway	4.6	70	171	0.24
East Lothian	1.9	46	62	0.13
Fife	4.3	177	164	0.09
Highland	62.9	112	794	0.71
Moray	2.5	45	270	0.60
North Ayrshire	0.6	61	29	0.05
Scottish Borders	2.9	55	79	0.14
South Ayrshire	3.9	52	504	0.97
Total	330	1,244	5,448	0.44

(1) £ million (2) thousands, Office for National Statistics

Table 13. Number of fishermen employed on Scottish based vessels, 2004 to 2008

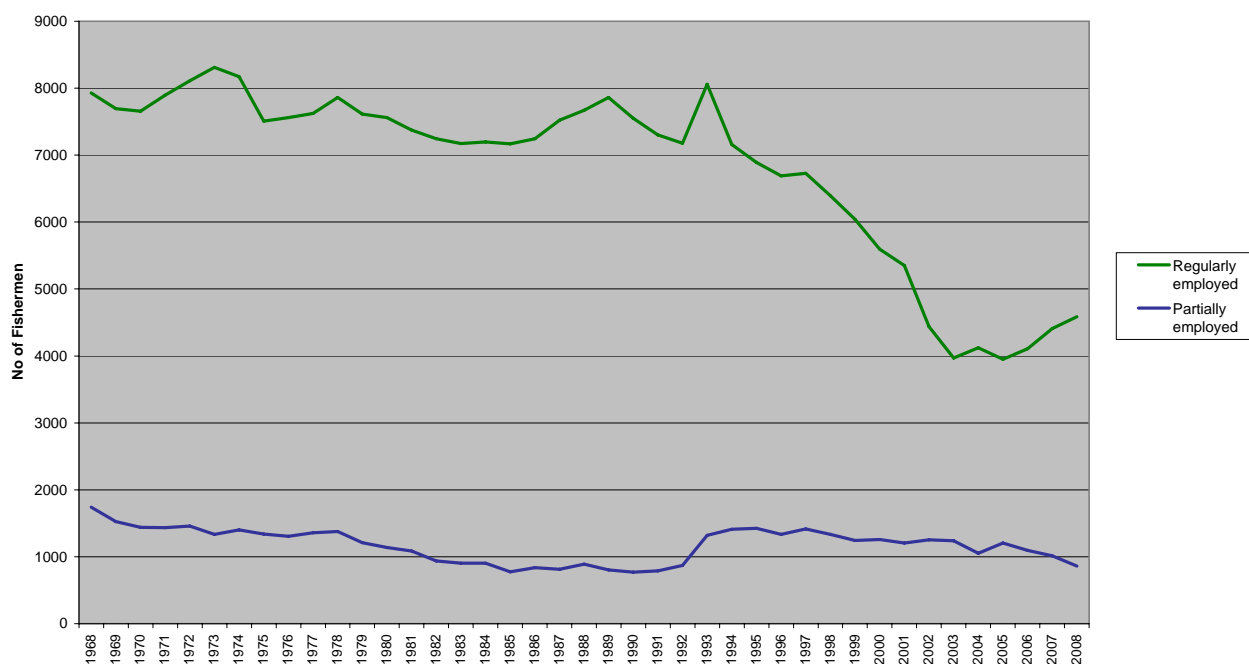
	2004	2005	2006	2007	2008
Regularly employed	4,124	3,952	4,109	4,408	4,585
Irregularly employed	1,052	1,110	999	951	807
Crofters	99	93	97	65	56
Total	5,275	5,155	5,205	5,424	5,448

Figures are limited to those employed on vessels which submit landing declarations to Scottish Fisheries Protection Agency port offices. They exclude, for example, those employed in cockle picking.

Table 14. Number of fishermen employed by district and employment status, 2008

	Regularly employed	Irregularly employed	Crofters	Total
Eyemouth	133	13	-	146
Pittenweem	117	47	-	164
Aberdeen	102	49	-	151
Peterhead	434	31	-	465
Fraserburgh	901	0	-	901
Buckie	220	50	-	270
Scrabster	191	0	-	191
Orkney	287	43	-	330
Shetland	257	216	-	473
Stornoway	414	105	18	537
Lochinver	22	3	2	27
Kinlochbervie	40	1	-	41
Ullapool	88	13	-	101
Mallaig	149	9	2	160
Oban	239	29	-	268
Campbeltown	239	32	-	271
Ayr	605	96	-	701
Portree	147	70	34	251
All districts	4,585	807	56	5,448

Chart 5 Number of fishermen employed on Scottish based vessels, 1968 to 2008



2. Overview of Catches and Landings

2.1 Landings by Scottish based vessels

Scottish based vessels made 79 thousand voyages in 2008, a 5 per cent decrease on the number in 2007 (Table 18). The value of landings increased by under 1 per cent in real terms to £396 million and the live weight landed increased by 2 thousand tonnes (1 per cent) to 371,000 tonnes.

The value of shellfish landings decreased by 7 per cent in real terms to £155 million in 2008 and the volume of landings decreased by 3 per cent to 65 thousand tonnes. This primarily reflects the drop in average price per tonne (at 2008 prices) of *Nephrops* landings by Scottish vessels, which in 2008 was 8 per cent lower than in 2007 (see table below). The average price per tonne of scallops and edible crabs landings also decreased by 8 per cent compared to 2007. Shellfish landings formed 17 per cent of the total by weight but 39 per cent by value (Chart I), meaning shellfish remains the most valuable sector to the Scottish fleet.

Change in prices obtained by Scottish vessels for main species – at 2008 prices

Species	2007 (at 2008 prices) (£ per tonne live weight)	2008 (£ per tonne live weight)	Change (%)
Cod	2,124	2,120	0
Haddock	1,304	1,117	-14
Hake	1,514	1,699	+12
Megrims	2,397	2,646	+10
Monkfish	2,565	2,726	+6
Saithe	500	572	+14
All demersal species	1,487	1,398	-6
Mackerel	667	793	+19
All pelagic species	434	490	+13
Edible crabs	1,218	1,125	-8
Nephrops	3,228	2,992	-7
Scallops	2,115	1,958	-7
All shellfish	2,486	2,385	-4

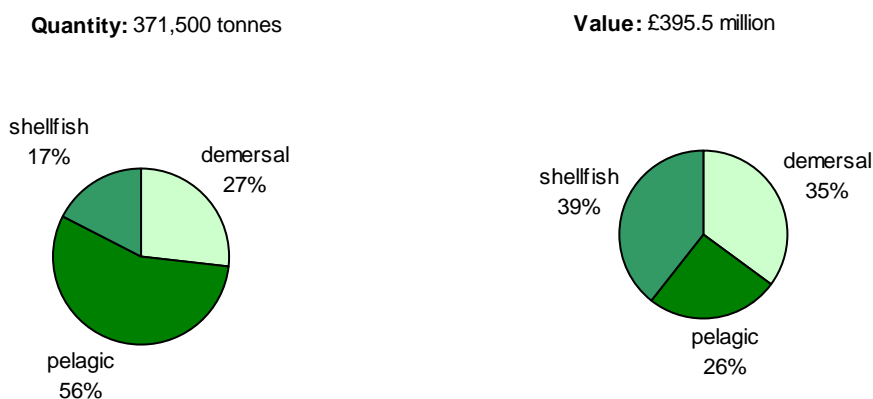
Source: Table 27

The volume of demersal landings increased by 12 per cent to 100 thousand tonnes. However, the value increased by only 5 per cent in real terms to £139 million. This reflects a combination of factors: the drop in average price per tonne of haddock, which is the most valuable demersal species landed by the Scottish fleet (down 15 per cent in real terms compared to 2007), which was not fully offset by the increase in average price for other demersal species such as hake (up by 11 per cent on the previous year), saithe (up by 14 per cent), monkfish (up by 6 per cent) and megrims (up by 10 per cent). Demersal landings formed 27 per cent of the total landings by weight and 35 per cent by value.

The volume of pelagic species landed decreased by 3 per cent to 207 thousand tonnes. However, prices per tonne increased and the value of pelagic landings increased by 9 per cent in real terms to £101 million. This was primarily due to the increased price of mackerel landings, up by 18 per cent since 2007. This rise reflected both increased prices received for mackerel landed abroad, up by 61 per cent in real terms on 2007 prices, and a 9 per cent increase in the average price for landings into the UK. The volume of mackerel landed abroad increased by 50 per cent to 27 thousand tonnes. Pelagic landings made up 56 per cent of the total volume and 26 per cent of the total value.

The proportion of the value of the annual catch of the Scottish based fleet landed into Scotland decreased to 83 per cent (Table 18) compared to 86 per cent in 2007.

Chart 1: Total landings by Scottish based vessels by species type, 2008



Looking at the longer term trends, the value of demersal landings decreased steeply between 1998 and 2003 but stabilised between 2003 and 2004 and has generally increased slightly thereafter. The 2008 figure of £139 million is 14 per cent higher in real terms compared with 2004. The value of pelagic landings (at 2008 prices) has varied around £100 million since 2000 and was £101 million in 2008. The value of shellfish landings was roughly stable until 2003 and has increased by 48 per cent in real terms since then to reach £155 million.

2.2 Total landings into Scotland

The quantity and value of all landings into each Scottish Fishery Office district are shown in Figures 1 and 2, respectively.

In 2008, the total value of fish landed into Scottish ports by vessels of all nationalities was £412 million, which is equal to the value of landings in 2007, at 2008 prices. The increase in value compared with 2004 (at 2008 prices) is 19 per cent. In 2008, the total quantity landed into Scottish ports by vessels of all nationalities was 396 thousand tonnes, 1 per cent lower than in 2007 and 4 per cent lower than in 2004 (Table 17). There has been a reduction in the contribution of the demersal sector to overall landings by volume since 2004, declining from 31 per cent to 28 per cent of landed volume. Pelagic species represented 56 per cent of landed volume in 2008, equal to the proportion in 2004, while shellfish landings contributed 16 per cent of the total volume landed, up from 13 per cent in 2004.

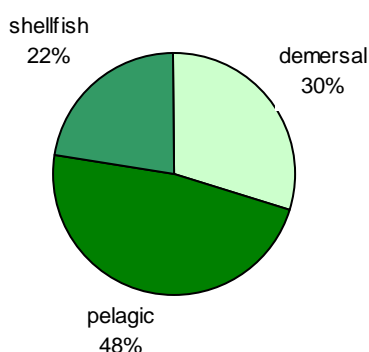
2.3 Landings by UK vessels into Scotland by area and district

In 2008, UK vessels landed 283 thousand tonnes of all species, at a value of £351 million, into Scottish ports. These landings represent a decrease of 1 per cent in value from 2007 (at 2008 prices) and a decrease of 9 per cent in quantity (Table 17). This decrease in quantity landed is due to the 18 per cent decrease in the volume of pelagic landings since 2007. The value of all landings by UK vessels into Scotland at 2008 prices has increased by 23 per cent in real terms since 2004.

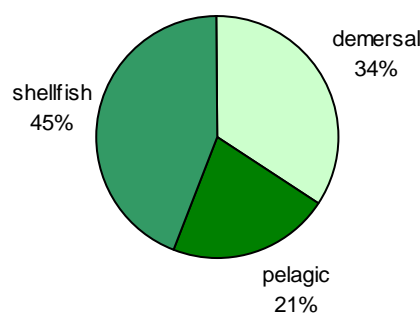
The species type composition of these landings was reasonably similar to that of landings by Scottish based vessels (Chart I), although pelagic vessels formed a smaller proportion of the UK landings into Scotland total (Chart II) as Scottish vessels landed 76 thousand pelagic tonnes abroad (Table 17).

Chart II: Landings by UK vessels into Scotland, 2008

Quantity: total 283,100 tonnes



Value: total £350.7 million

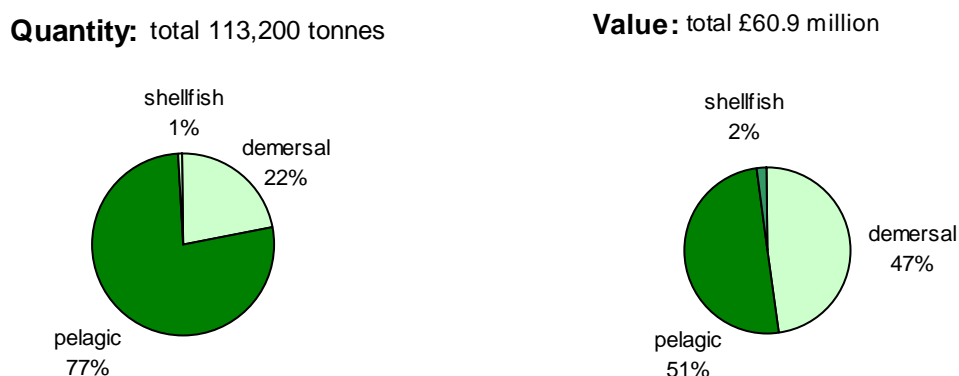


2.4 Landings by foreign vessels into Scotland

Foreign vessels landed 113 thousand tonnes of fish worth £61 million into Scottish ports in 2008, an increase of 23 thousand tonnes and £5 million since 2007. The difference is mostly due to increased pelagic landings, up by 24 thousand tonnes and £7 million compared to 2007 (Table 17).

In 2008, the composition of species types landed by foreign vessels was similar to 2007, with a slight increase in the proportion of the landings into Scotland of pelagic species, up from 70 per cent to 77 per cent (Chart III). Most of the remainder comprised demersal species, with just 900 tonnes of shellfish landed.

Chart III: Foreign landings into Scotland by species type, 2008



2.5 UK quota

Since 2004, the UK quota for key demersal² stocks has increased by 5 per cent and the quota for key pelagic³ stocks has decreased by 31 per cent.

Table II: Combined UK quota ('000 tonnes) for key demersal and pelagic stocks 2004-2008 (based on Table 15)

Quota ('000 tonnes)	2004	2005	2006	2007	2008	Change 2004 - 2008
Combined key demersal stocks	141	142	149	153	148	+7 (+5%)
Combined key pelagic stocks	277	251	206	216	191	-85 (-31%)

² Key demersal stocks are considered to be North Sea & West of Scotland stocks of Cod, Haddock, Monkfish, Whiting, Saithe, Plaice and Norway Lobster.

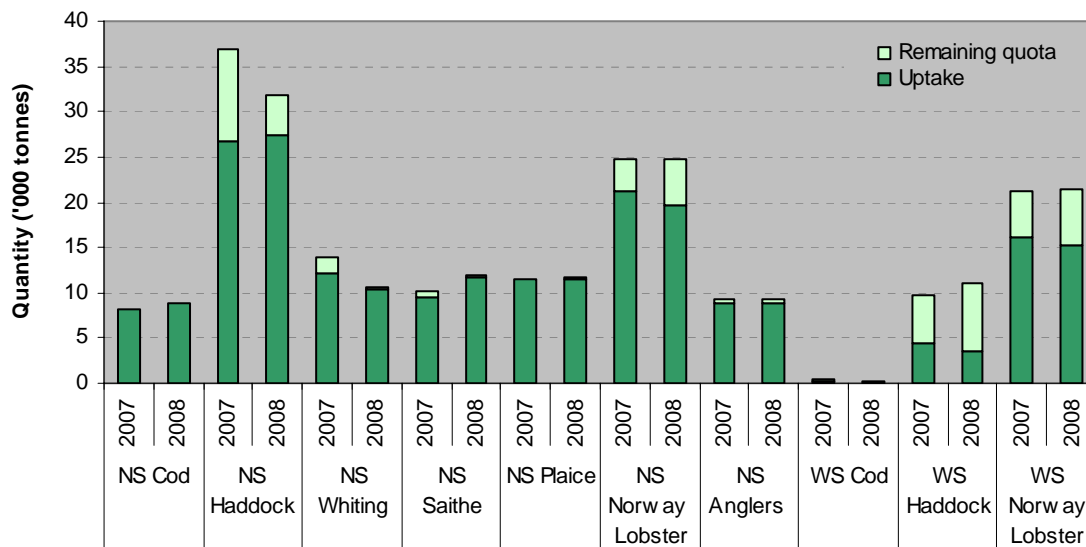
³ Key pelagic stocks are considered to be North Sea & West of Scotland stocks of Mackerel, Herring and Horse Mackerel.

2.5.1 Demersal stocks

Quota uptake reached 100 per cent for West of Scotland Cod and was close to 100 per cent for five of the other key demersal stocks (NS Cod, NS Saithe, NS Whiting, NS Plaice, and WS Anglers; Chart IV, Table 15). Uptake of NS Anglers was 95 per cent. Uptake of demersal stocks in 2008 was similar to that in 2007, with the following examples of differences evident:

- Uptake of WS Cod increased from 84 to 100 per cent, as quota decreased by 23 per cent, forcing landings to decrease by 8 per cent.
- Uptake of WS Saithe increased from 36 to 77 per cent, as quota decreased by 6 per cent and landings doubled.
- Uptake of WS Anglers increased from 86 to 98 per cent, as quota decreased by 13 per cent while landings remained steady.
- Uptake of NS Whiting increased from 87 to 98 per cent, as quota decreased by 24 per cent, forcing landings to decrease by 14 per cent.
- Uptake of WS Haddock decreased from 45 per cent to 32 per cent as quota increased by 14 per cent while landings decreased by 20 per cent.

Chart IV: Quota uptake of main North Sea (NS) and West of Scotland (WS) demersal stocks by UK vessels in 2007 and 2008



2.5.2 Pelagic stocks

Quota uptake for the four most important pelagic stocks continued to be high in 2008, approaching 100 per cent for NS Herring, WS Herring and WS Mackerel and approaching 90 per cent for NS Mackerel. Some notable changes in quota occurred over the last year for these stocks:

- NS Herring quota decreased by 47 per cent; landings correspondingly decreased by 48 per cent.
- WS Herring quota and landings decreased by 20 per cent.
- WS Mackerel quota and landings decreased by 6 per cent.
- WS Horse Mackerel quota almost doubled, but landings decreased by 14 percent, leading to quota uptake dropping from 86 to 38 per cent.
- NS Horse Mackerel quota decreased by 19 percent but landings decreased even more, by 58 percent, leading to quota uptake dropping from 100 per cent to 52 per cent.

Chart V: Quota uptake of main North Sea (NS) and West of Scotland (WS) pelagic stocks by UK vessels in 2007 and 2008.

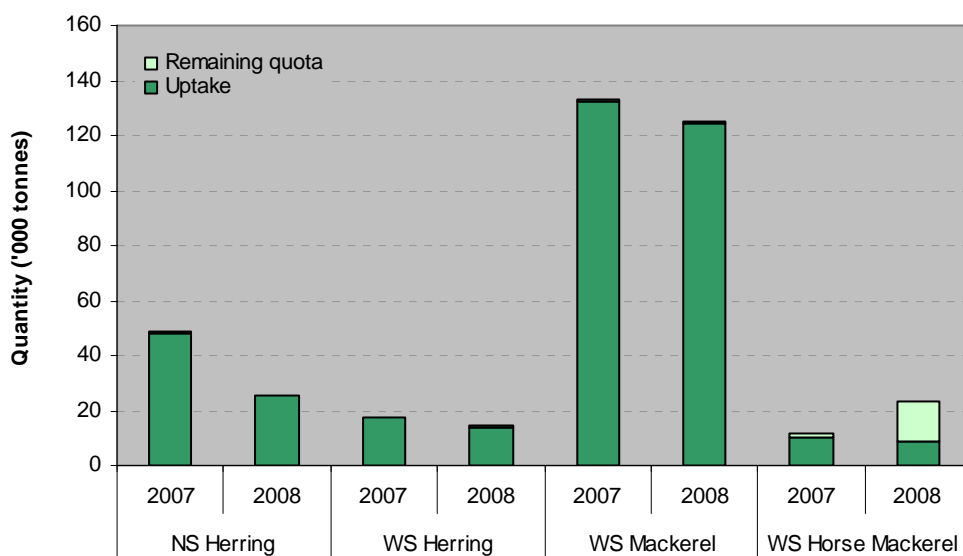


Figure 1: Live weight (tonnes) landed by district, 2008

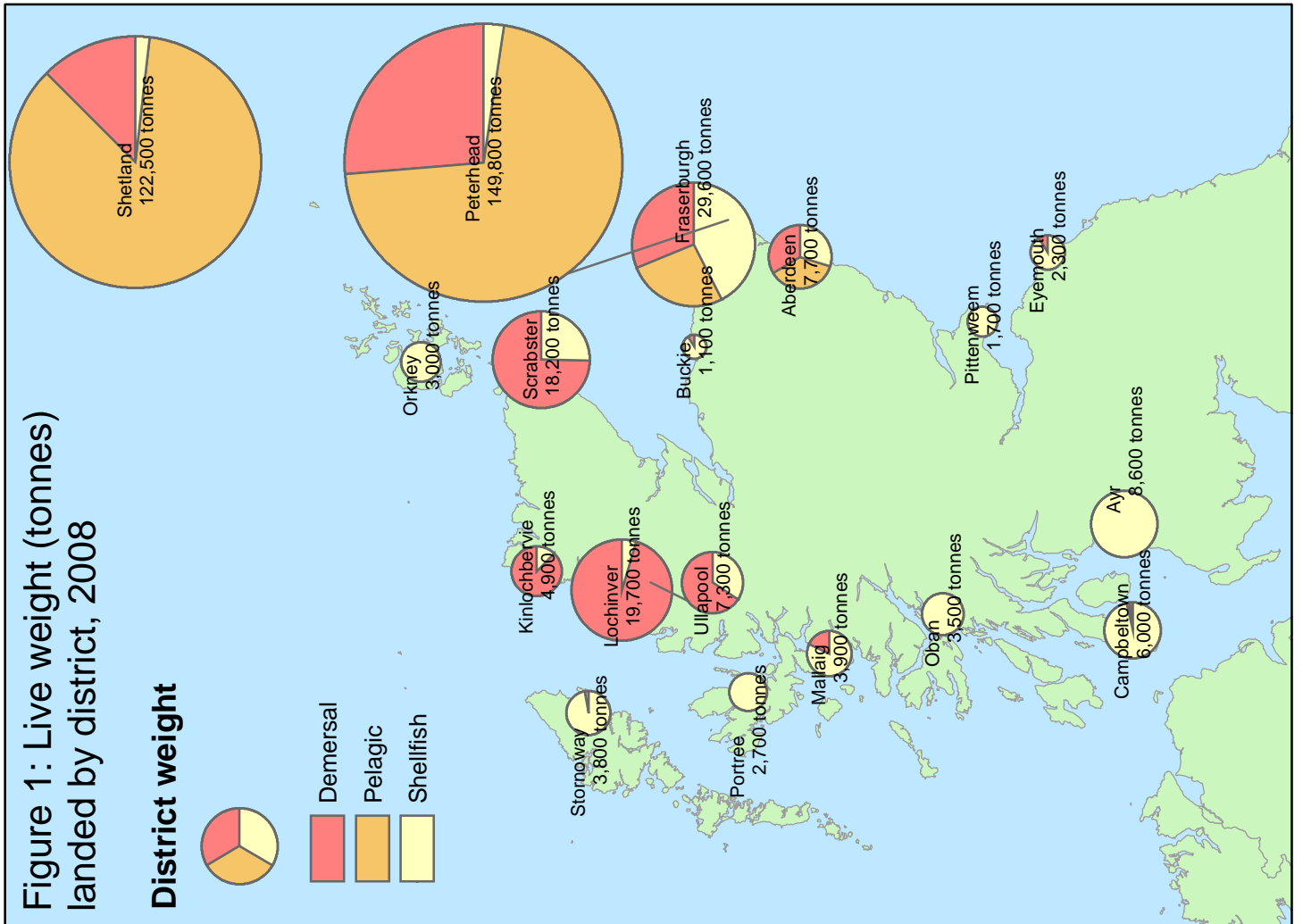


Figure 2: Value (£) landed by district, 2008

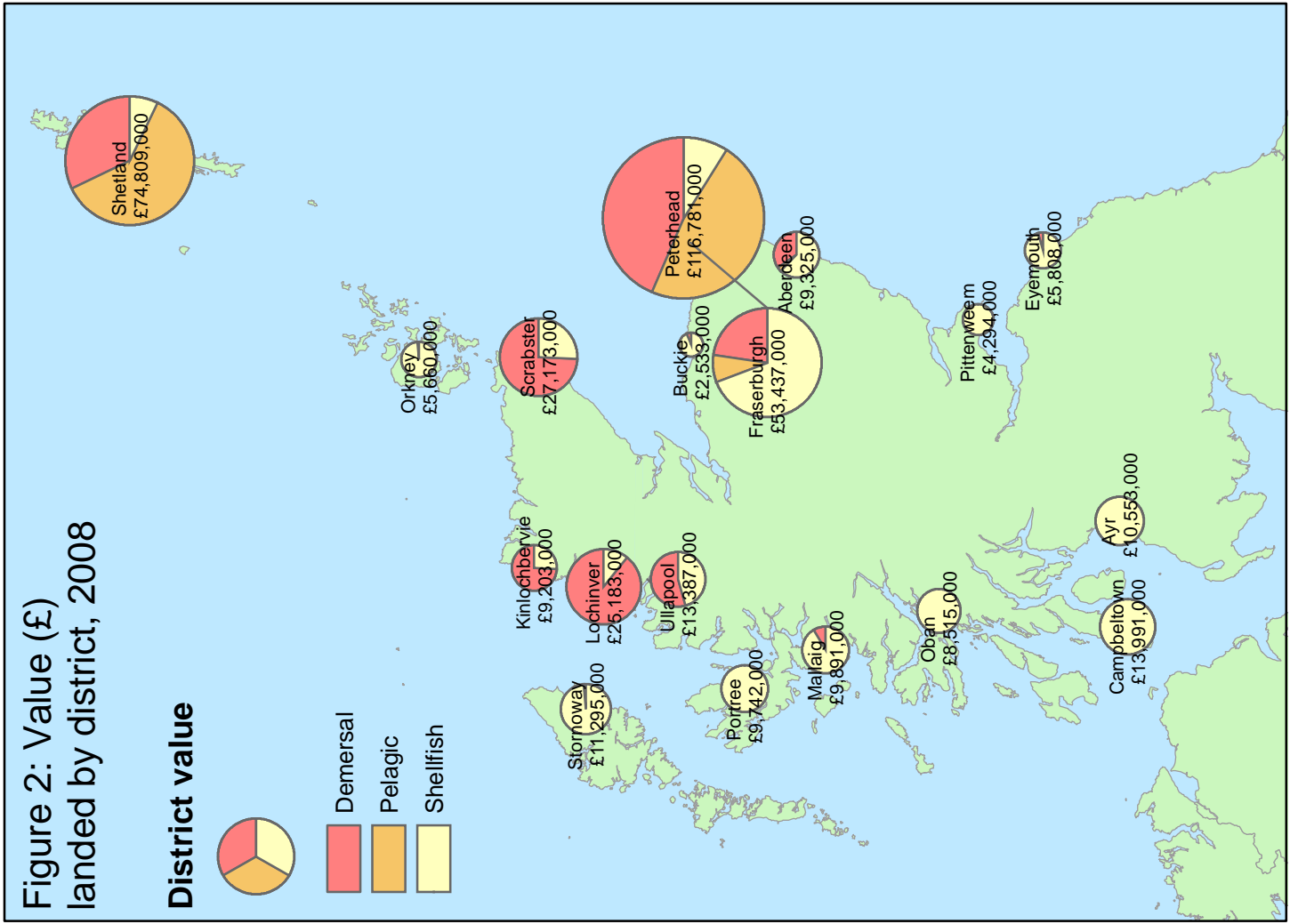


Table 15. continued

Area	Species	Sea area	Year	EU total		UK quota		UK uptake	
				allowable catch	exchanges	After	% of TAC	Tonnes	% of quota
Faroes	Cod/haddock	Vb (Faroes)	2004	500	465	93.0	437	94.0	
			2005	500	480	96.0	447	93.1	
			2006	500	480	96.0	385	80.2	
			2007	500	480	96.0	460	95.8	
			2008	500	480	96.0	469	97.6	
	Saithe	Vb (Faroes)	2004	2,500	863	34.5	816	94.6	
			2005	2,500	1,069	42.8	1,010	94.5	
			2006	2,800	1,216	43.4	1,099	90.4	
			2007	2,700	1,016	37.6	408	40.2	
			2008	2,425	807	33.3	358	44.3	
	Redfish	Vb (Faroes)	2004	6,300	1,867	29.6	140	7.5	
			2005	4,000	854	21.4	106	12.4	
			2006	3,000	232	7.7	66	28.4	
			2007	2,265	44	1.9	9	20.5	
			2008	1,600	67	4.2	6	9.0	
	Ling/blue ling	Vb (Faroes)	2004	3,240	444	13.7	284	64.0	
			2005	3,240	334	10.3	302	90.4	
			2006	3,065	245	8.0	151	61.6	
			2007	3,065	224	7.3	165	73.7	
			2008	3,065	275	9.0	121	44.1	
	Flatfish	Vb (Faroes)	2004	1,000	680	68.0	111	16.3	
			2005	600	408	68.0	93	22.8	
			2006	450	294	65.3	66	22.4	
			2007	300	201	67.0	21	10.4	
2008			300	204	68.0	21	10.4		
Other species	Vb (Faroes)	2004	760	221	29.1	224	101.4		
		2005	760	319	42.0	301	94.4		
		2006	760	345	45.4	315	91.3		
		2007	760	200	26.3	159	79.5		
		2008	760	180	23.7	98	54.4		
Blue whiting	Vb (Faroes)	2004	16,000	4,040	25.3	807	20.0		
		2005	16,000	2,806	17.5	2,805	100.0		
		2006	16,000	2,564	16.0	2,564	100.0		
		2007	18,000	4,396	24.4	2,813	64.0		
		2008	12,240	4,385	35.8	3,042	69.4		

Source : EU Commission

UK figures are as reported to the EC Commission in 2006. This data, however, is still provisional and does not take into account flexibility arrangements, or small adjustments required to UK landings abroad by other member states.

Area	Species	Sea area	Year	EU total		UK quota		UK uptake	
				allowable catch	exchanges	After	% of TAC	Tonnes	% of quota
Greenland	Redfish	V, XIV (Greenland)	2004	25,500	338	1.3	338	100.0	
			2005	15,938	284	1.8	108	38.0	
			2006	13,229	66	0.5	-	-	
			2007	6,049	42	0.7	8	19.0	
	2008	-	-	-	-	-			
	Greenland halibut	V, XIV (Greenland)	2004	4,800	1,615	33.6	1,572	97.3	
			2005	6,300	271	4.3	272	100.4	
			2006	6,300	1	0.0	-	-	
2007			7,071	516	7.3	515	99.9		
Iceland	Redfish	Va (Iceland)	2004	3,000	1,710	57.0	972	56.8	
			2005	3,000	1,625	54.2	1,125	69.2	
			2006	1,160	1,160	100.0	400	34.5	
			2007	3,000	1,160	38.7	297	25.6	
			2008	-	-	-	-	-	

Chart 6. UK percentage uptake of main quota stocks, 2008

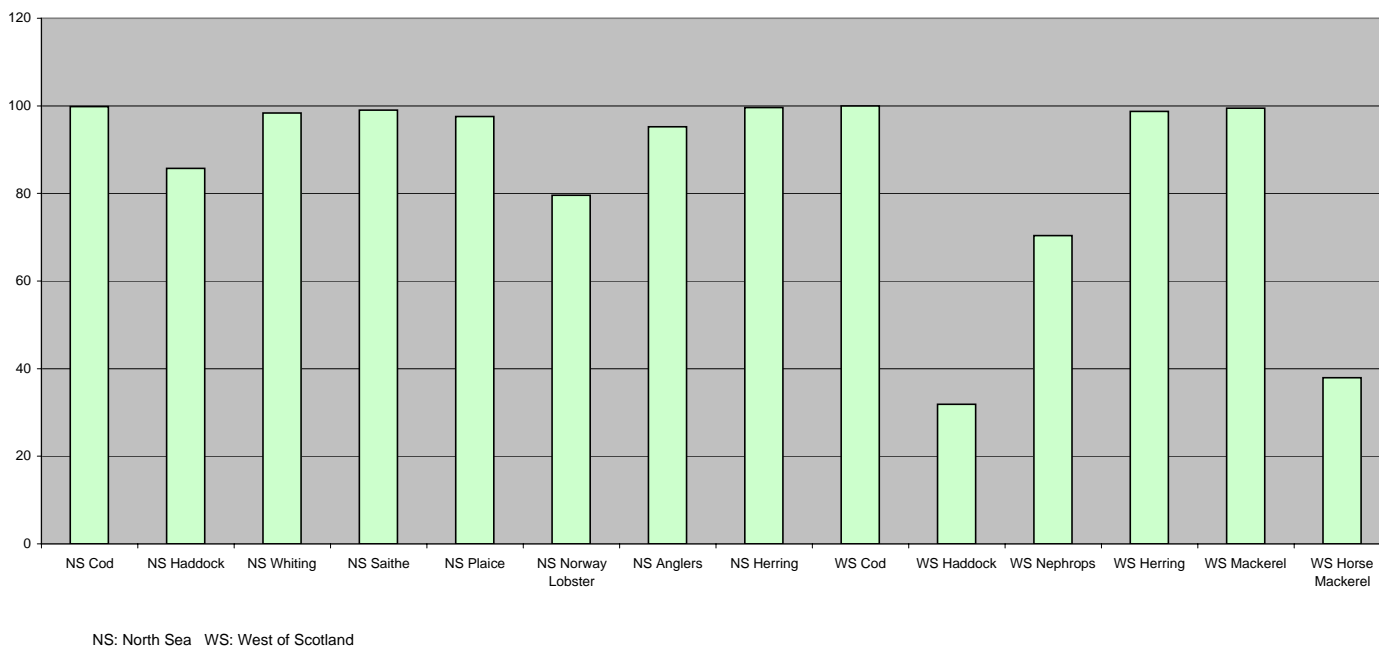


Table 16. Fixed quota units (thousands), by sea area and country, 1st January 2009

	North Sea (1)			West of Scotland (2)			Area VII		
	Scottish vessels	Other UK vessels	Held in PO (3) pools	Scottish vessels	Other UK vessels	Held in PO (3) pools	Scottish vessels	Other UK vessels	Held in PO (3) pools
Demersal	1,194	479	808	2,602	987	214	179	80	143
Pelagic	199	54	230	79	33	62	6	54	27
Shellfish	212	27	22	105	24	3	93	7	85
Total	1,606	560	1,060	2,786	1,044	279	277	141	254

(1) includes southern North Sea herring (2) includes western hake (3) Producer Organisations

Table 23. continued

	Kinlochbervie	
	Tonnes	£'000
Blue ling	127	163
Cod	234	489
Dogfish portugese	34	26
Dogfish spur	23	38
Forkbeard	66	49
Haddock	1,141	1,369
Hake	96	125
Ling	190	248
Megrims	312	772
Monks	933	2,719
Plaice	20	13
Redfish	61	54
Saithe	731	388
Scabbardfish	23	21
Skates & rays	72	61
Tusk	46	39
Whiting	79	79
Other demersal	82	178
Total demersal	4,269	6,831
Total pelagic	0	0
Edible crabs	122	143
Lobsters	112	1,142
Nephrops	151	453
Scallops	34	59
Squid	199	551
Other shellfish	10	24
Total shellfish	629	2,371
Total landings	4,898	9,203

	Ullapool	
	Tonnes	£'000
Cod	57	123
Haddock	758	1,021
Hake	124	461
Ling	123	183
Megrims	42	88
Monks	503	1,442
Saithe	361	239
Whiting	28	33
Witches	81	104
Other demersal	94	115
Total demersal	2,170	3,809
Total pelagic	0	0
Edible crabs	846	1,010
Nephrops	783	3,186
Scallops	204	351
Squid	314	1,044
Other shellfish	11	92
Total shellfish	2,158	5,681
Total landings	4,328	9,490

	Mallaig	
	Tonnes	£'000
Haddock	151	129
Hake	132	109
Megrims	40	68
Monks	81	214
Skates & rays	80	64
Whiting	122	102
Witches	50	44
Other demersal	75	102
Total demersal	729	833
Edible crabs	55	56
Nephrops	2,688	7,771
Razor fish	20	61
Scallops	295	816
Squid	23	62
Velvet crabs	54	118
Other shellfish	16	175
Total shellfish	3,151	9,059
Total landings	3,880	9,891

	Oban	
	Tonnes	£'000
Total demersal	28	27
Total pelagic	0	0
Edible crabs	828	883
Lobsters	70	735
Nephrops	1,149	4,037
Razor fish	35	103
Scallops	1,062	2,043
Velvet crabs	275	644
Other shellfish	9	43
Total shellfish	3,429	8,488
Total landings	3,457	8,515

	Campbeltown	
	Tonnes	£'000
Haddock	55	46
Other demersal	32	34
Total demersal	86	80
Herring	54	10
Other pelagic	0	0
Total pelagic	54	10
Edible crabs	467	512
Green crabs	20	11
Lobsters	51	574
Nephrops	3,351	8,693
Razor fish	281	851
Scallops	1,310	2,396
Velvet crabs	377	826
Other shellfish	22	38
Total shellfish	5,879	13,900
Total landings	6,019	13,991

	Ayr	
	Tonnes	£'000
Haddock	36	42
Other demersal	7	15
Total demersal	43	58
Total pelagic	2	2
Edible crabs	37	40
Lobsters	58	627
Nephrops	2,307	5,159
Queen scallops	4,552	1,685
Razor fish	65	178
Scallops	1,385	2,703
Whelks	94	69
Other shellfish	9	31
Total shellfish	8,508	10,493
Total landings	8,553	10,553

	Portree	
	Tonnes	£'000
Total demersal	4	5
Total pelagic	5	1
Edible crabs	315	366
Nephrops	1,385	7,344
Scallops	931	1,761
Velvet crabs	32	73
Other shellfish	16	192
Total shellfish	2,679	9,736
Total landings	2,687	9,742

	All ports	
	Tonnes	£'000
Blue ling	222	290
Bream - rays	42	40
Catfish	206	330
Cod	7,645	16,054
Dogfish portugese	37	29
Dogfish spur	163	209
Forkbeard	124	108
Greenland halibut	144	233
Gurnards - red	65	19
Haddock	29,488	32,679
Hake	3,487	6,214
Halibut	278	1,428
John dory	47	240
Lemon sole	933	2,321
Ling	2,571	3,161
Megrims	2,528	6,855
Monks	10,086	28,021
Other flatfish	28	49
Plaice	832	658
Pollack	973	1,821
Redfish	174	178
Red mullet	21	27
Roes	43	113
Saithe	12,783	7,334
Scabbardfish	26	28
Skates & rays	626	527
Turbot	46	340
Tusk	167	146
Whiting	9,226	9,277
Witches	872	1,063
Other demersal	253	215
Total demersal	84,134	120,011
Blue whiting	15,345	1,449
Herring	32,367	8,272
Horse mackerel	633	149
Mackerel	86,619	64,634
Pilchards	164	14
Sprats	192	39
Other pelagic	56	3
Total pelagic	135,376	74,562
Edible crabs	8,831	10,126
Green crabs	207	114
Lobsters	1,026	10,949
Mussels	923	257
Nephrops	32,765	95,475
Periwinkles	58	73
Queen scallops	4,562	1,700
Razor fish	526	1,496
Scallops	10,086	25,094
Squid	1,515	4,384
Surf clams	101	142
Velvet crabs	2,711	5,832
Whelks	255	162
Other shellfish	35	343
Total shellfish	63,601	156,147
Total landings	283,111	350,720

(1) liveweight landings of 20 tonnes or more.

Chart 8. Liveweight landings into Scotland by UK vessels, by species type, 1968 to 2008

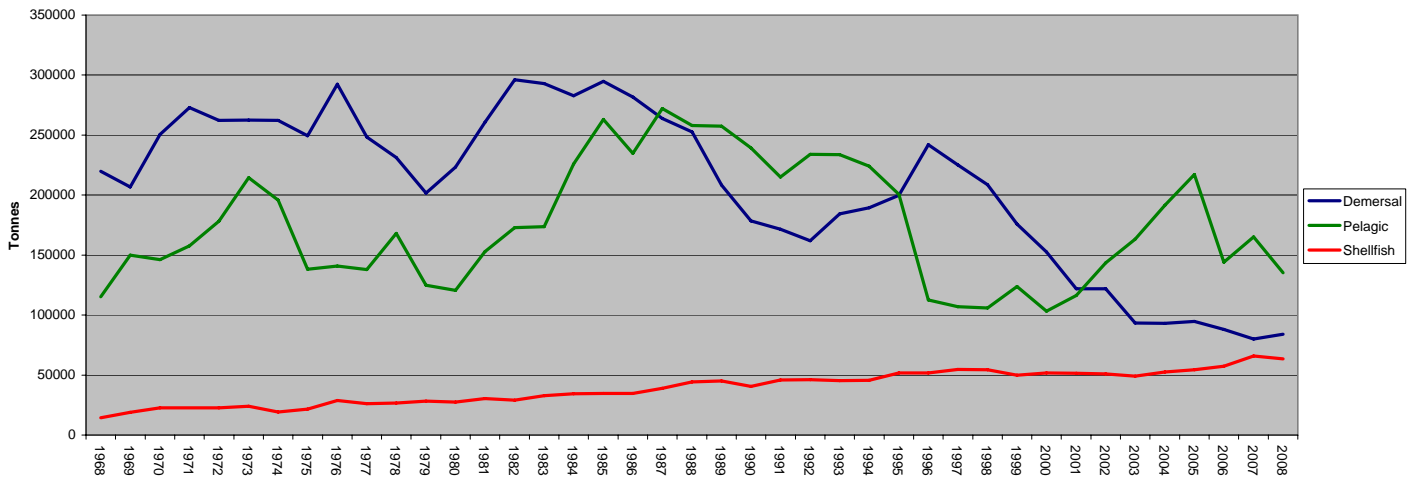


Chart 9. Average prices of landings into Scotland, by species type and month, 2008

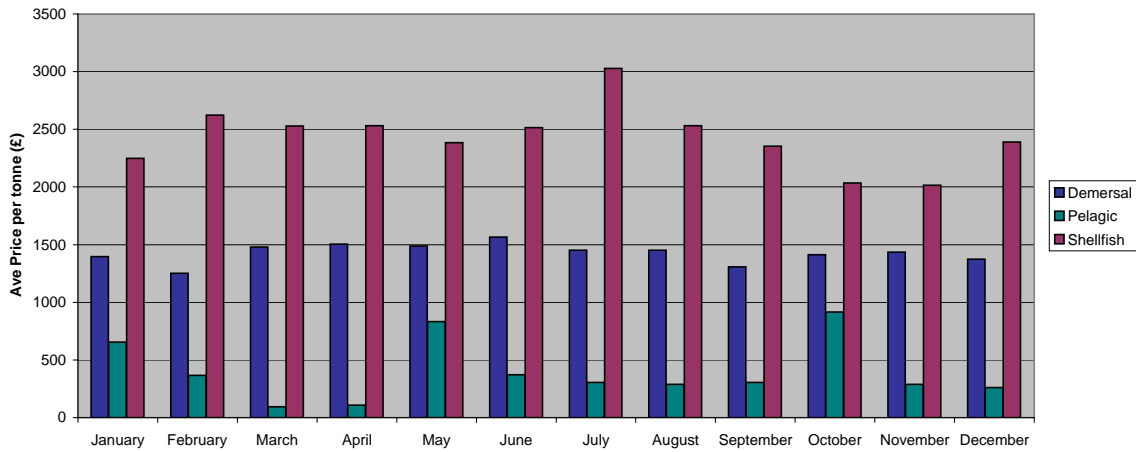


Table 24. Liveweight and value of landings into Scotland by foreign vessels, by main (1) species, 2004 to 2008

	Tonnes					Value (£'000) (1)				
	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008
Blue ling	4,161	3,641	3,534	3,534	2,517	5,573	4,915	5,102	3,961	2,453
Cod	4,099	1,937	713	602	507	5,638	3,376	1,445	1,298	1,074
Hake	1,013	2,250	1,876	2,066	4,186	4,756	9,763	8,115	3,338	6,894
Ling	765	780	667	839	1,409	734	872	743	1,193	1,677
Monks	1,079	1,227	1,214	1,572	1,829	2,451	2,999	3,358	4,027	4,464
Roundnose grenadier	6,464	3,966	3,184	2,837	2,204	7,547	4,710	4,022	1,152	1,751
Saithe	7,796	7,823	8,137	8,208	5,406	3,910	4,525	4,181	3,934	2,297
Black scabbardfish	2,387	2,403	2,172	2,499	3,139	5,128	4,682	4,685	3,815	3,822
Other demersal	8,525	5,958	4,444	4,429	3,959	9,074	6,451	5,233	6,495	4,344
Total demersal	36,289	29,984	25,942	26,588	25,156	44,811	42,292	36,882	29,215	28,776
Argentines (Silver smelt)	101	-	3	-	2,256	16	-	2	-	1,150
Blue whiting	19,902	14,270	17,820	19,971	43,949	1,212	727	2,488	3,409	5,715
Herring	5,351	15,338	26,331	19,571	19,263	844	4,163	6,632	4,119	5,036
Mackerel	13,201	13,742	22,963	23,102	20,253	6,985	13,568	18,595	15,476	18,560
Other pelagic	72	850	1,982	712	1,423	1	172	394	148	388
Total pelagic	38,627	44,200	69,100	63,357	87,144	9,059	18,630	28,111	23,153	30,848
Total shellfish	326	526	693	764	929	482	648	1,949	2,365	1,232
Total	75,241	74,711	95,735	90,709	113,229	54,352	61,569	66,943	54,732	60,856

(1) landings of £1.0 million or more in 2008

Table 25 Liveweight and value of landings into Scotland by foreign vessels, by country of origin, 2004 to 2008

	Tonnes					Value (£'000) (1)				
	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008
Denmark	4,571	8,675	14,731	12,139	6,835	555	1,486	5,604	5,237	5,776
Eire	18,089	16,337	18,989	15,753	10,727	7,531	9,833	10,248	8,839	7,179
Faroe	19,365	18,939	18,780	19,919	26,392	15,240	17,450	13,109	12,613	11,701
France	17,243	14,888	15,467	16,519	15,895	24,364	21,124	19,254	17,074	15,636
Germany	1,174	1,486	354	967	2,008	625	656	866	1,013	1,392
Iceland	1,513	1,454	1,768	-	1,605	178	71	156	-	144
Netherlands	-	-	16	124	82	-	-	30	248	152
Norway	11,370	9,404	20,782	21,611	46,157	782	1,740	9,289	6,094	12,551
Poland	34	359	2,665	979	-	12	160	1,207	617	-
Russia	43	-	-	-	-	31	-	-	-	-
Spain	1,579	2,674	2,183	1,779	3,164	5,000	8,866	7,181	2,677	5,922
Sweden	262	495	-	919	363	34	183	-	320	401
Total	75,241	74,711	95,735	90,709	113,229	54,352	61,569	66,943	54,732	60,856

Table 26. Liveweight and value of landings into Scotland by foreign vessels, by landing district, 2004 to 2008

	Tonnes					Value (£'000) (1)				
	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008
North east ports (2)	14,507	21,797	33,213	31,387	37,787	6,392	11,929	17,325	15,269	17,855
Other east coast	-	-	-	-	-	-	-	-	-	-
North mainland ports (3)	14,635	9,942	6,389	6,114	5,535	11,678	8,662	7,660	6,548	6,368
Orkney/Shetland	24,649	22,825	35,955	32,652	49,847	3,159	7,099	10,990	10,118	13,727
North west/WI ports (4)	21,372	20,146	20,145	20,556	20,059	32,974	33,879	30,925	22,797	22,906
South west ports (5)	77	-	34	-	-	149	-	42	-	-
Total	75,241	74,711	95,735	90,709	113,229	54,352	61,569	66,943	54,732	60,856

(1) When the Register of Buyers and Sellers (RBS) was introduced in September 2005, Sales Notes were not initially required for sales of shellfish and information on the value of such landings is consequently missing. The value has therefore been estimated for a number of landings, mostly shellfish, relating to voyages starting on or after 1 September 2005

(2) Aberdeen to Buckie port districts; (3) Scrabster to Kinlochbervie; (4) Lochinver to Oban; (5) Campbeltown to Ayr

Table 30. Liveweight and value of landings by Scottish based vessels, by main (1) species and overall vessel length group (metres), 2008

	Liveweight (tonnes)											Total	Value (£'000)											Total
	Overall vessel length group												Overall vessel length group											
	<8	8-10	>10-12	>12-15	>15-18	>18-24	>24-30	>30-40	>40-50	over 50	<8		8-10	>10-12	>12-15	>15-18	>18-24	>24-30	>30-40	>40-50	over 50			
Cod	1	4	10	47	185	2,261	4,038	593	172	295	7,606	1	8	20	88	363	4,632	8,686	1,329	427	569	16,123		
Dover sole	0	0	0	0	1	3	2	25	222	0	253	0	1	0	0	4	14	14	194	1,673	0	1,900		
Haddock	0	5	8	303	481	9,072	14,547	3,700	8	752	28,876	0	4	10	191	353	8,837	16,708	5,198	10	937	32,247		
Hake	0	1	0	17	37	740	2,225	1,690	23	219	4,951	0	1	0	9	29	894	4,003	3,043	26	408	8,413		
Halibut	-	0	0	5	13	128	104	20	2	3	277	-	1	1	27	72	668	518	109	9	19	1,425		
Lemon Sole	-	1	1	9	32	463	333	134	65	11	1,048	-	2	1	18	60	1,083	900	392	227	32	2,714		
Ling	0	4	0	14	33	513	1,475	510	1	120	2,669	0	4	0	15	40	620	1,815	608	1	155	3,258		
Megrim	-	1	1	47	193	1,438	765	500	0	42	2,987	-	3	1	122	497	3,987	2,071	1,130	1	91	7,903		
Monks	-	1	4	178	389	4,114	4,330	2,454	39	257	11,767	-	3	10	466	1,029	11,433	12,185	6,150	99	698	32,072		
Plaice	-	2	2	19	46	380	345	1,199	3,091	9	5,093	0	2	1	11	32	291	288	1,542	4,485	10	6,662		
Pollack	2	7	0	1	0	86	437	190	5	27	756	3	13	1	1	1	177	884	348	11	52	1,492		
Red mullet	-	0	0	2	4	15	1	202	84	-	307	-	0	0	1	3	19	3	923	335	-	1,285		
Saithe	1	18	-	16	77	1,868	6,590	2,067	1	1,316	11,952	1	8	-	7	45	1,028	3,758	1,238	1	752	6,836		
Turbot	-	0	0	1	5	18	21	32	99	1	177	-	1	1	5	32	126	157	232	738	3	1,296		
Whiting	1	3	3	108	338	4,119	4,205	285	13	61	9,136	0	3	2	68	258	3,898	4,582	325	10	64	9,209		
Witches	-	0	0	23	109	489	142	249	0	2	1,016	-	0	0	24	114	590	202	285	0	3	1,220		
Other demersal	2	7	6	30	126	534	1,310	1,553	737	6,528	10,834	7	5	7	28	120	655	1,607	1,683	561	690	5,362		
Total demersal	7	55	37	819	2,069	26,238	40,872	15,402	4,562	9,643	99,705	13	58	55	1,083	3,051	38,951	58,382	24,728	8,615	4,481	139,416		
Blue whiting	-	-	-	-	-	-	-	-	-	24,004	24,004	-	-	-	-	-	-	-	-	-	-	2,559	2,559	
Herring	0	-	-	-	58	0	0	1	1,962	43,547	45,569	0	-	-	-	11	0	0	0	565	9,662	10,239		
Mackerel	258	122	-	0	0	0	1	6	1,786	106,748	108,922	182	103	-	0	0	0	1	6	1,118	84,956	86,366		
Other pelagic	-	0	-	-	-	0	16	439	785	27,138	28,378	0	0	-	-	0	0	0	465	342	1,317	2,124		
Total pelagic	258	122	-	0	58	1	16	446	4,534	201,437	206,873	182	103	-	0	11	0	1	470	2,026	98,495	101,289		
Edible crabs	552	2,625	1,423	510	1,630	816	0	9	40	128	7,734	595	2,926	1,536	557	1,918	1,009	0	8	22	127	8,698		
Lobsters	421	357	159	53	18	2	-	0	0	18	1,029	4,365	3,865	1,718	582	211	20	-	0	2	197	10,961		
Nephrops	298	2,603	2,245	3,885	7,432	12,062	1,724	63	7	192	30,511	2,134	12,112	8,652	9,528	18,538	33,969	5,161	373	20	800	91,287		
Queen scallops	0	2	4	0	173	4,255	-	-	-	3	4,437	1	3	9	0	59	1,580	-	-	-	-	1,653		
Razor clam	0	254	108	39	125	-	-	-	-	-	526	0	720	272	116	388	-	-	-	-	-	1,496		
Scallops	806	343	635	687	2,451	3,823	2,099	3,081	0	623	14,548	1,535	2,055	1,181	1,191	5,098	7,348	3,947	4,998	0	1,132	28,485		
Squid	-	139	17	85	92	271	664	231	31	107	1,638	-	342	38	234	302	668	2,037	757	122	313	4,812		
Velvet crabs	1,141	953	533	38	9	0	-	-	-	40	2,714	2,322	2,118	1,189	94	21	1	-	-	-	-	87	5,832	
Other shellfish	233	318	58	1,000	2	4	1	137	21	5	1,778	257	404	81	357	1	102	1	366	11	6	1,587		
Total shellfish	3,451	7,595	5,182	6,297	11,932	21,233	4,488	3,521	100	1,117	64,915	11,210	24,543	14,676	12,661	26,536	44,697	11,146	6,503	177	2,663	154,813		
Total landings	3,716	7,772	5,219	7,116	14,060	47,473	45,376	19,369	9,196	212,197	371,493	11,405	24,704	14,731	13,744	29,598	83,649	69,529	31,701	10,818	105,639	395,517		

(1) Total value over £1.0m

Chart 11. Value of landings at 2008 prices by Scottish based vessels by species type, 1999 to 2008

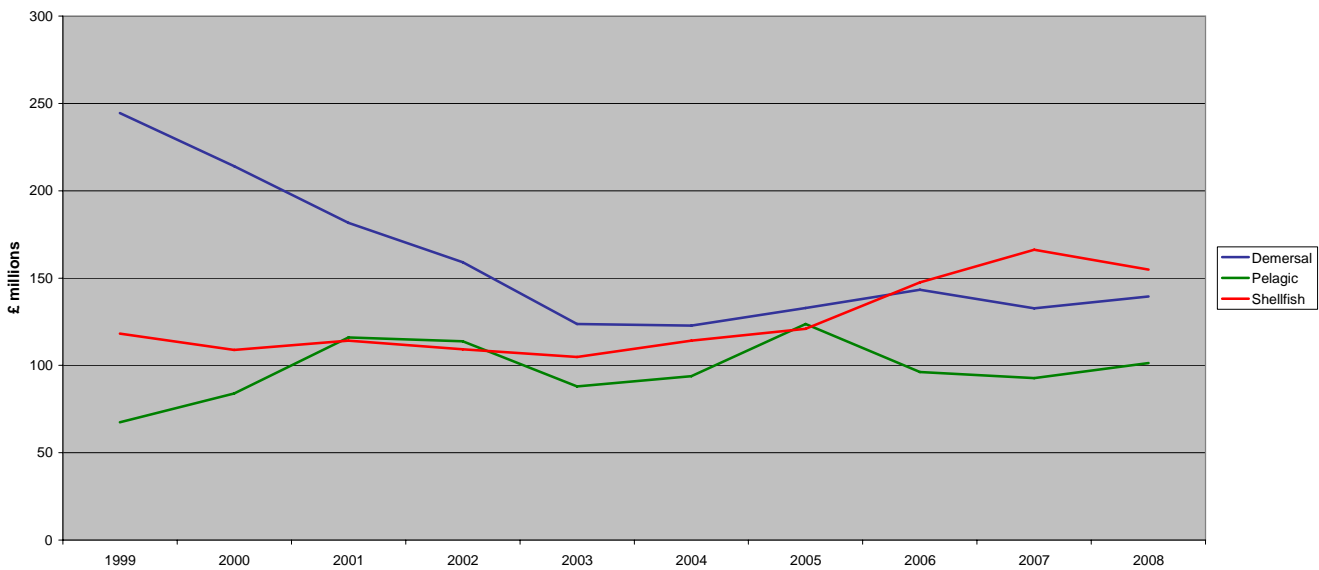


Table 31. Liveweight and value of landings by Scottish based vessels, by main (1) species and gear 2008

	Liveweight (tonnes)								Value (£'000)							
	Demersal trawl (2)	Demersal seine	Demersal twin trawl	Lines	Gill nets	Beam trawl	Other demersal	Demersal total	Demersal trawl (2)	Demersal seine	Demersal twin trawl	Lines	Gill nets	Beam trawl	Other demersal	Demersal total
Cod	5,789	1,016	735	7	5	39	3	7,594	12,328	2,084	1,583	14	9	78	7	16,102
Dover sole	5	0	6	-	0	231	-	242	35	0	41	-	0	1,733	-	1,809
Haddock	22,733	4,776	1,346	1	-	0	-	28,857	26,501	4,480	1,253	2	-	0	-	32,236
Hake	2,026	342	97	2,462	23	1	-	4,950	2,804	454	93	5,033	27	0	-	8,412
Halibut	221	15	39	0	2	0	-	276	1,131	81	196	-	10	1	-	1,419
Lemon Sole	814	75	106	0	0	51	-	1,046	2,109	175	257	-	0	171	-	2,712
Ling	1,737	33	309	516	72	0	-	2,668	2,151	38	372	629	67	0	-	3,257
Megrim	2,233	322	429	0	3	0	-	2,987	5,785	1,010	1,100	0	8	0	-	7,903
Monks	7,583	191	1,940	0	2,023	2	-	11,739	21,066	508	5,479	0	4,950	5	-	32,010
Plaice	1,550	137	791	0	0	2,603	-	5,081	1,746	116	1,267	0	0	3,521	-	6,650
Pollack	704	9	34	7	0	-	0	754	1,382	18	75	14	0	-	0	1,489
Red Mullet	22	280	5	-	-	0	-	307	43	1,234	7	-	-	0	-	1,285
Saithe	10,806	206	917	20	0	0	-	11,949	6,217	112	494	11	0	0	-	6,834
Skates & Rays	484	71	96	33	28	12	-	723	416	71	70	24	23	13	-	617
Turbot	61	3	27	0	0	76	-	168	438	22	193	2	2	579	-	1,235
Whiting	6,424	1,928	747	1	0	1	-	9,102	6,430	2,172	584	1	0	1	-	9,189
Witches	814	30	171	-	-	0	-	1,015	982	42	195	-	-	0	-	1,219
Other demersal	7,913	353	187	1,223	82	286	-	10,045	2,558	638	223	770	101	329	-	4,619
Total demersal	71,918	9,787	7,979	4,271	2,239	3,304	4	99,503	94,123	13,257	13,481	6,500	5,197	6,432	8	138,998
Other species	11,789	138	5,593	1,559	24	64	10	19,176	8,502	485	14,478	1,101	72	70	28	24,737

	Liveweight (tonnes)			Value (£'000)		
	Pelagic purse seine	Pelagic trawl	Pelagic total	Pelagic purse seine	Pelagic trawl	Pelagic total
Blue whiting	-	24,004	24,004	-	2,559	2,559
Herring	-	39,789	39,789	-	9,156	9,156
Mackerel	575	104,273	104,848	546	82,628	83,175
Pilchards	9,956	14,501	24,456	286	432	718
Other pelagic	64	1,565	1,628	5	325	330
Total pelagic	10,595	184,131	194,726	837	95,100	95,938
Other species	-	58	58	-	96	96

	Liveweight (tonnes)						Value (£'000)					
	Creel fishing	Nephrop trawl (2)	Dredging	Hand shellfishing	Other methods	Shellfish total	Creel fishing	Nephrop trawl (2)	Dredging	Hand shellfishing	Other methods	Shellfish total
Edible crabs	7,663	0	6	2	-	7,671	8,645	0	6	3	-	8,654
Velvet crabs	2,706	-	0	3	-	2,709	5,815	-	1	7	-	5,822
Lobsters	1,023	0	1	0	-	1,024	10,896	0	11	2	-	10,909
Nephrops	1,743	23,719	1	0	-	25,463	14,217	62,948	2	0	-	77,168
Queen Scallops	0	-	4,262	-	-	4,262	1	-	1,591	-	-	1,592
Razor Clam	4	-	161	360	-	524	9	-	404	1,079	-	1,493
Scallops	19	-	14,173	344	-	14,537	50	-	27,521	878	-	28,449
Squid	3	1	0	-	-	4	7	3	0	0	-	10
Other shellfish	615	-	998	60	0	1,673	915	-	324	76	0	1,315
Total shellfish	13,775	23,720	19,602	770	0	57,867	40,555	62,951	29,861	2,045	0	135,412
Other species	25	87	50	1	-	163	23	86	227	1	-	338

(1) Total value over £0.5m

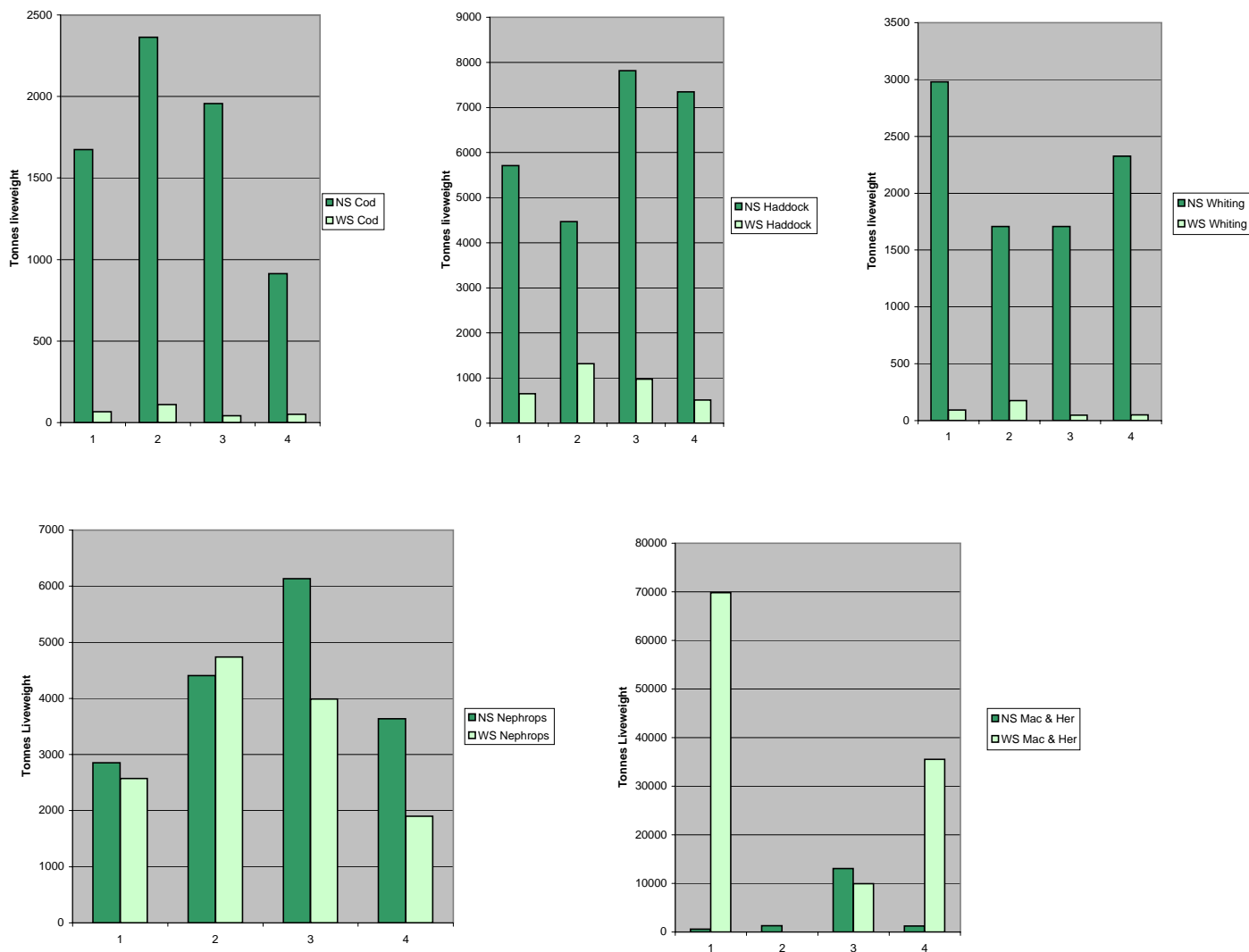
(2) Bottom trawl gears catching demersal species have been included as demersal trawl; those catching nephrops have been included as nephrop trawl.

Table 32. Key commercial quota stocks landed by Scottish vessels 2004 to 2008

	Tonnes					Value (£'000) (1)				
	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008
Atlanto Scandian Herring	6,960	-	11,973	13,244	19,737	1,261	-	5,217	5,730	2,838
North Sea cod	6,590	6,625	6,723	6,512	6,909	11,283	11,675	12,833	13,567	14,729
North Sea haddock	39,104	41,315	31,547	24,919	25,346	27,466	33,255	36,790	31,699	27,913
North Sea herring	45,331	74,510	47,920	32,624	15,690	5,927	15,417	11,318	6,202	4,550
North Sea monkfish	5,456	7,569	7,257	8,238	8,601	11,097	18,666	19,130	20,314	23,429
North Sea nephrops	13,184	15,344	16,894	17,923	17,034	28,950	38,641	49,845	55,908	46,912
West of Scotland cod	440	329	334	286	270	751	606	646	560	553
West of Scotland haddock	3,242	3,119	5,339	4,222	3,458	2,668	2,841	6,441	5,466	4,241
West of Scotland herring	13,996	14,830	13,148	12,027	10,141	1,772	2,958	3,087	2,256	2,852
West of Scotland mackerel	141,001	131,382	78,219	107,066	105,186	71,138	88,552	63,620	69,996	82,433
West of Scotland monkfish	1,031	1,493	1,397	1,547	1,707	2,281	4,396	4,086	4,183	4,803
West of Scotland nephrops	9,412	9,493	12,504	14,139	13,201	27,971	28,492	38,982	44,924	43,278
Edible crabs	5,977	6,581	8,469	10,089	7,734	6,182	7,031	10,280	12,022	8,698
Velvet crabs	2,299	1,802	2,594	2,944	2,714	3,118	2,994	4,758	5,845	5,832
Scallops	14,113	12,458	10,970	12,371	14,548	22,108	20,172	20,888	25,606	28,485

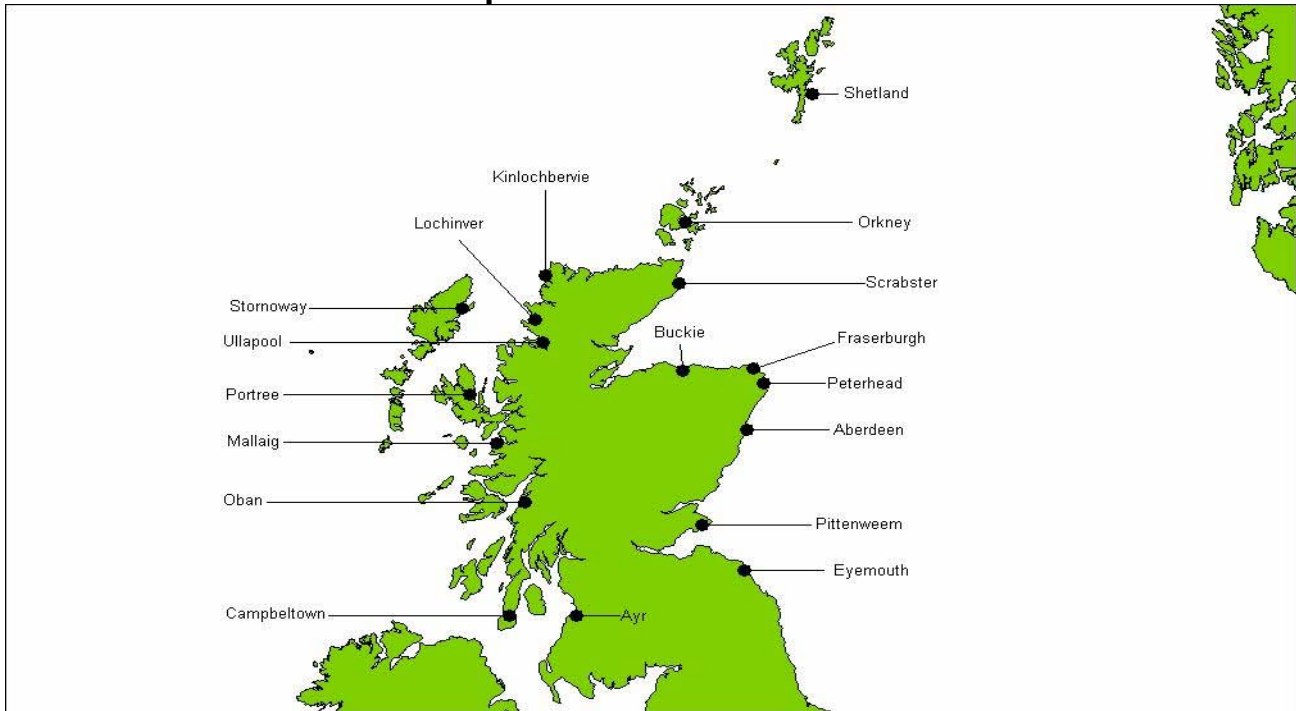
(1) When the Register of Buyers and Sellers (RBS) was introduced in September 2005, Sales Notes were not initially required for sales of shellfish and information on the value of such landings is consequently missing. The value has therefore been estimated for a number of landings, mostly shellfish, relating to voyages starting on or after 1 September 2005.

Chart 12. Liveweight landings by Scottish based vessels, by quarter, 2008



NS:North Sea WS:West of Scotland

Annex 1 - Port districts and ports in Scotland



Aberdeen

Aberdeen
Arbroath
Catterline
Gourdoun
Johnshaven
Montrose
Stonehaven

Ayr

Annan
Ayr
Ballantrae
Cumbraes
Drummore
Dunure
Girvan
Kirkcudbright
Largs & Greenock
Maidens
Portpatrick
Stranraer
Troon & Saltcoats
Whithorn

Buckie

Buckie
Burghead
Findochty
Hopeman
Lossiemouth
Portknockie

Campbeltown

Ardrishaig
Arran
Bruichladdich
Bute
Campbeltown
Carradale
Colonsay
Crinan
Gigha
Islay
Jura
Port Askaig
Port Ellen
Tarbert
Tayinloan
Tayvallich
West Loch Tarbert

Eyemouth

Burnmouth
Cove
Dunbar
Eyemouth
Granton
North Berwick
Port Seton
St Abbs

Fraserburgh

Fraserburgh
Gardenstown
Macduff
Pennan
Portsoy
Rosehearty
Sandhaven & Pitullie
Whitehills

Kinlochbervie

Eriboll
Kinlochbervie
Scourie

Lochinver

Culkein/Drumbeg
Kylesku
Lochinver

Mallaig

Ardnamurchan
Arisaig
Corpach
Glenuig
Mallaig
Salen

Oban

Coll
Fort William
Loch Buie (Mull)
Loch Scridain (Mull)
Luig
Oban
Tiree
Tobermory (Mull)

Orkney

Hoy
Kirkwall
Rousay
S Ronaldsay
Sanday
Stromness
Stronsay
Tingwall
Westray

Peterhead

Boddam
Peterhead
Port Errol

Pittenweem

Anstruther
Burntisland
Crail
Methil & Leven
Pittenweem
St Andrews
St Monans

Portree

Bracadale
Broadford
Dunvegan
Kyle
Portree
Sleat
Snizort
Strathaird
Torridon

Shetland

Central Mainland
Lerwick
Northmavine
S Mainland & Fair Isle
Scalloway
Skerries
West Mainland
Whalsay
Yell, Fetlar & Unst

Stornoway

Barra
Benbecula
Bernera (Lewis)
Bernera (N Uist)
Grimsay
Lochs
North Harris
North Uist
Portnaguran & Ness
Scalpay
South Harris
South Uist & Eriskay
Stornoway

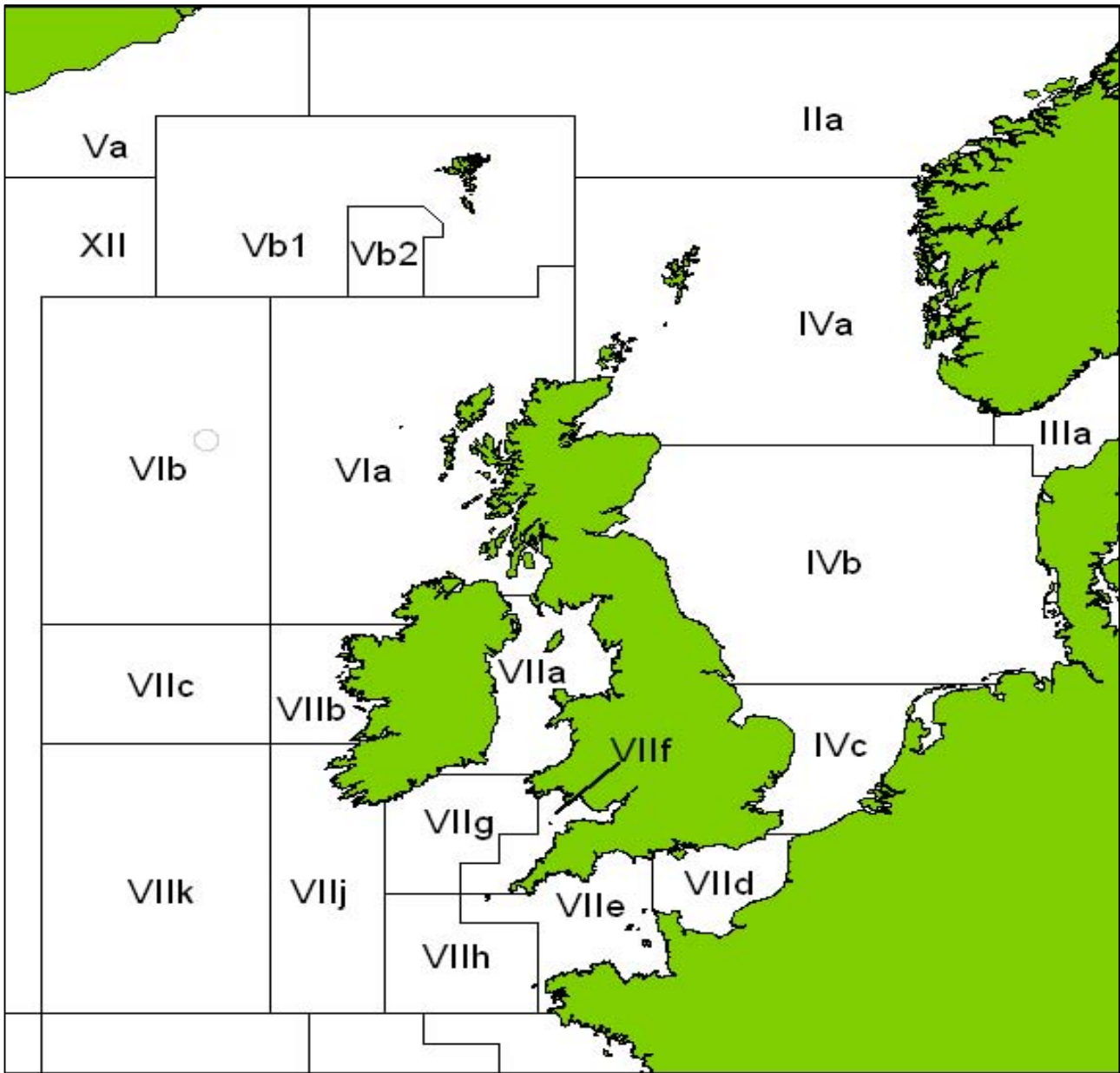
Ullapool

Achiltibuie
Aultbea
Gairloch
Ullapool

Scrabster

Avoch
Brora
Dunbeath
Helmsdale
Invergordon
Inverness
John O'Groats
Keiss
Lybster
Portmahomack
Portskerra
Scrabster
Wick

Annex 2 - ICES Fishing Areas around the UK Coastline



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