

The most recent data on the fishing industry for 2009 shows the total volumes of fish landed in the three North East ports of Aberdeen, Fraserburgh and Peterhead have increased in the last year, by 1.6%.

The total volume of demersal (white fish species such as haddock and cod) and shellfish stocks have increased 1.7% from 51,113 to 51,958 tonnes. Overall the total value of fish landed in the North East has remained similar to the previous year.

Data in this bulletin is taken from the Scottish Government's most recent 'Scottish Sea Fisheries Statistics 2009' published in Autumn 2010. Figures relate to landings by UK vessels into Scottish ports in mid 2009. Previous Aberdeenshire Council fisheries bulletins have included the port of Buckie. However, the North East Region now corresponds only to the ports of Aberdeen, Peterhead and Fraserburgh so direct comparisons with previous bulletins should not be made.

## Volume (Weight) of Landings

### Total Landings

In 2009, over 151,000 tonnes of fish were landed into ports in the North East of Scotland. This represents over half of all landings into Scotland and 38% into the UK. Peterhead remains the largest port in the UK and among the largest in Europe, particularly in the landing of white fish and pelagic catches.

In addition, Fraserburgh landed over 13,000 tonnes of shellfish in 2009, making it the largest shellfish port in the UK. Given this, the fishing industry in the North East remains an important sector of the local economy.

Figure 1 - Volume (Tonnes, Live Weight) of Total Fish Landings by UK Vessels, 1997-2009

Landing District	2009	2008	1997	Change '08-'09	Change '97-'09
Aberdeen	3,510	7,598	32,615	-53.8%	-89.2%
Peterhead	111,865	113,397	108,951	-1.4%	2.7%
Fraserburgh	36,311	28,251	39,672	28.5%	-8.5%
NE Scotland	151,686	149,246	181,238	1.6%	-16.3%
Scotland	277,340	283,111	386,400	-2.0%	-28.2%
UK	394,200	408,200	593,200	3.4%	-33.5%
NE as % of Scotland	54.6%	52.7%	46.9%	3.6%	-16.3%
NE as % of UK	38.4%	36.7%	30.5%	4.6%	25.9%

Source: Scottish Government

Figures published by the Scottish Government for 2009 show an overall increase of 1.6% in the volume of fish landed in the North East since 2008 (see Figure 1).

Changes in the total volume of fish landed are closely related to the types of fish that each port lands. Demersal landings fell by 53.7% between 1997 and 2009. However, between 2008 and 2009 there was a 1.7% growth in the North East.

The reduction in landings generally over the period is largely as a result of TAC and quota restrictions that were introduced over the period to prevent over-fishing of vulnerable demersal stocks. This has negatively impacted on the ports of Fraserburgh and Aberdeen where demersal landings are relatively more important.

Pelagic landings have risen 62.8% between 1997 and 2009. This has been reflected in increased landings at Peterhead, where pelagic landings make up 54.9% of all landings into the fishing district.

The year on year comparison between 2008 and 2009 shows an increase of 1.7% in pelagic landings in the North East. Landings of shellfish (such as lobster, prawns and scallops) decreased -4.7 % over the period 1997 to 2009 but rose 4.8% between 2008 and 2009.

### Tonnage by Landing District

**Aberdeen** (includes all recorded landings at Aberdeen, Arbroath, Catterline, Gourdon, Johnshaven, Montrose and Stonehaven) landed over 3,500 tonnes of fish in 2009, a decrease of 53.8% on the previous year.

In terms of volume of fish caught, Aberdeen landed similar numbers of demersal and shellfish catches.

**Peterhead** (includes Peterhead, Boddam and Port Errol) continues to be the top UK pelagic port landing 33% of the UK's total pelagic catch. Peterhead is also still the largest white fish port in Scotland and the UK with 34% and 26% of the respective total demersal catches.

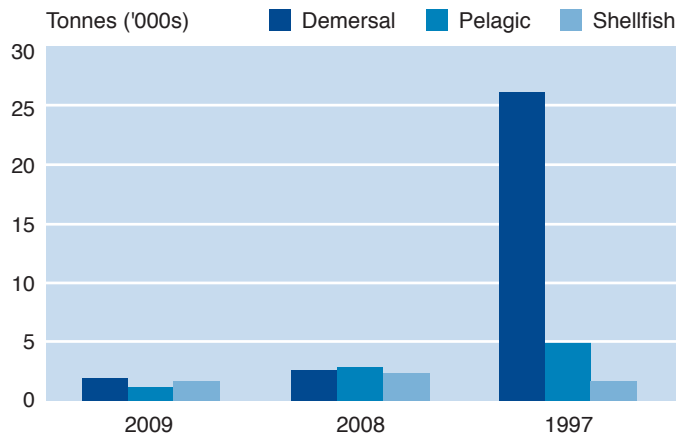
Over 2009, total landings decreased in Peterhead by 1.2%, largely as a result of quota cuts to the pelagic species.

**Fraserburgh** (includes Fraserburgh, Gardenstown, Macduff, Pennan, Portsoy, Rosehearty, Sandhaven and Whitehills) is the largest shellfish port in the UK and lands 21% of Scotland's total shellfish.

In 2009, total landings at Fraserburgh were up 26% the previous year, primarily as a result of the increase in the shellfish landing 9.4%.

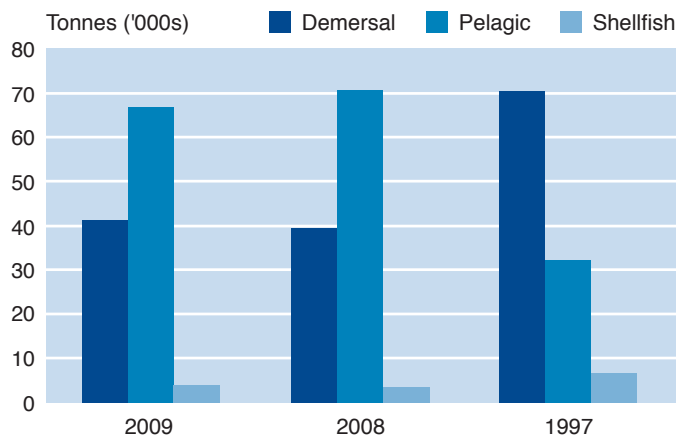
(see Figures 2, 3 and 4 overleaf)

Figure 2 - Volume (Tonnes, Live Weight) of Landings at Aberdeen, 1997-2009



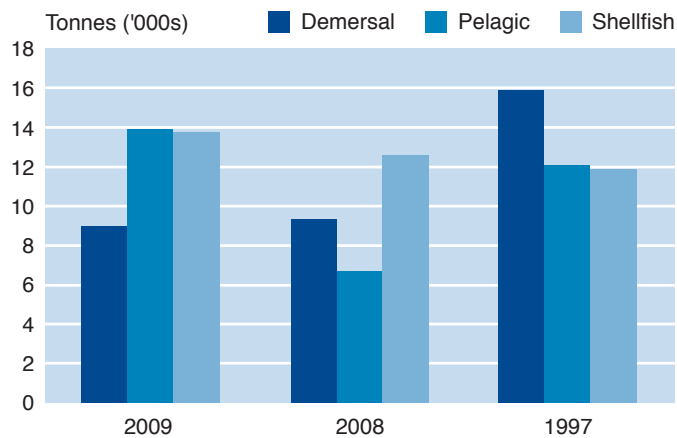
Source: Scottish Government

Figure 3 - Volume (Tonnes, Live Weight) of Landings at Peterhead, 1997-2009



Source: Scottish Government

Figure 4 - Volume (Tonnes, Live Weight) of Landings at Fraserburgh, 1997-2009



Source: Scottish Government

## Value of Landings

### Total Landings

Since 1997, the real value (inflation adjusted) changes in North East fish landings are shown in Figure 5.

There has been a 9% fall in real price from the 1997 figure. The Scotland figure is the same at 9% whilst the UK witnessed a decrease of 3%. By district, Aberdeen has suffered a large decline in value reflecting reduced fish tonnage whilst Peterhead has suffered a slight increase (0.3%). Value per tonne has risen in the North East port of Fraserburgh generally over the period since 1997.

In 2009, Aberdeen and Fraserburgh experienced a decrease in real value, for Aberdeen perhaps a reflection of reduced tonnage landed over the year. However, Peterhead saw a 1% increase in the value of fish, likely to be the result of increased volumes of fish landed there. The port also had significant landings from foreign vessels.

Figure 5 - Value of Total Fish Landings by UK Vessels, 1997-2009 (£'000, Real Prices)

Landing District	2009	2008	1997	Change '08-'09	Change '97-'09
Aberdeen	6,073	9,177	29,231	-33.8%	-79.2%
Peterhead	101,435	100,419	91,641	1.0%	10.7%
Fraserburgh	48,448	52,093	33,672	-7.0%	43.9%
NE Scotland	155,956	161,689	154,635	-3.5%	0.9%
Scotland	351,564	350,720	348,563	0.2%	0.9%
UK	519,600	526,000	482,806	-1.2%	7.6%
NE as % of Scotland	43.2%	46.1%	44.3%	-6.3%	-2.5%
NE as % of UK	29.2%	30.7%	32.0%	-4.9%	-8.8%

Source: Scottish Government

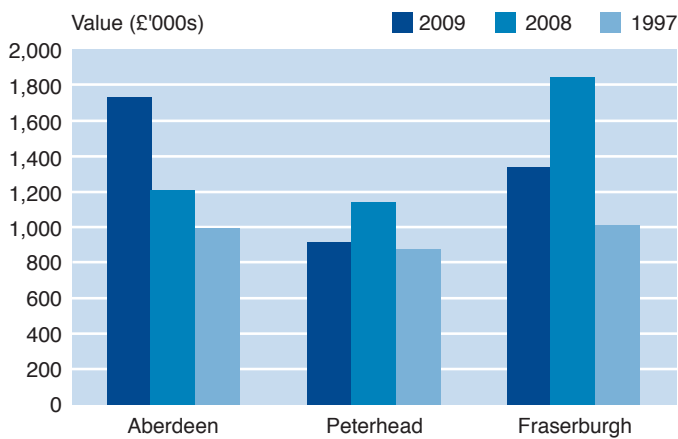
By main species, white fish values in North East Scotland have fallen by 20% in real terms since 1997. By contrast North East pelagic values increased 148% compared with the Scotland increase of 228% and the UK, 142%. This large increase can be attributed to the tonnage increase and increased capacity for processing at pelagic factories in the North East.

Shellfish values in the North East have increased marginally by over 17% since 1997, while the Scottish and UK value has risen by 20.7% and 20.8% respectively.

On the whole; there was an increase of 0.2% in value in the North East ports in 2009, from £350,720 in 2008 to the £351,564 in 2009.

Converting the volume and value statistics to real value per tonne analysis reveals that between 1997 and 2009 the North East price per tonne for all fish species rose by 38% from £2,867 to £3,971.

Figure 6 - Real Value per Tonne of Total Fish Landings by UK Vessels, 1997-2009



Source: Scottish Government

Figure 6 shows that across the North East fishing districts, values per tonne have increased at all ports since 1997.

All North East ports witnessed an increase in value per tonne, Aberdeen by 75.5%, Peterhead by 3.9% and Fraserburgh, 32.5%.

These variations reflect the type of fish caught at each port; Aberdeen and Peterhead are largely pelagic and demersal ports and these species are relatively cheaper to buy than shellfish, which dominates landings at Fraserburgh.

2009 was a good year as value per tonne figures rose in all North East ports. Peterhead remained the top port in the UK for whitefish and pelagic species.

### Volume and Value of Fish Landings 2009 by Main Species, Totals and Landing Districts

SPECIES	ABERDEEN		PETERHEAD		FRASERBURGH		TOTAL	
	Volume (Tonnes)	Value (£'000)	Volume (Tonnes)	Value (£'000)	Volume (Tonnes)	Value (£'000)	Volume (Tonnes)	Value (£'000)
Cod	170	299	5,008	9,070	459	791	5,637	10,160
Haddock	1,251	1,285	18,527	17,996	3,782	2,262	23,560	21,543
Monkfish	n/a	n/a	1,743	5,522	1,287	4,100	3,030	9,622
Saithe	213	152	7,750	5,575	579	382	8,542	6,109
Whiting	84	93	3,556	3,837	1,407	1,009	5,049	4,939
<b>TOTAL DEMERSAL</b>	<b>1,876</b>	<b>2,126</b>	<b>41,193</b>	<b>49,011</b>	<b>8,889</b>	<b>10,865</b>	<b>51,958</b>	<b>62,002</b>
Herring	n/a	n/a	17,934	5,578	2,942	862	20,876	6,440
Mackerel	n/a	n/a	47,725	38,241	10,824	9,226	58,049	47,647
<b>TOTAL PELAGIC</b>	<b>11</b>	<b>10</b>	<b>66,925</b>	<b>44,318</b>	<b>13,766</b>	<b>10,087</b>	<b>80,702</b>	<b>54,415</b>
Norway Lobster (Nephrops)	203	493	2,851	6,562	11,889	23,893	14,943	30,948
<b>TOTAL SHELLFISH</b>	<b>1,623</b>	<b>3,938</b>	<b>3,747</b>	<b>8,106</b>	<b>13,656</b>	<b>27,496</b>	<b>19,026</b>	<b>39,540</b>
<b>TOTAL ALL SPECIES</b>	<b>3,510</b>	<b>6,073</b>	<b>111,865</b>	<b>101,435</b>	<b>36,311</b>	<b>48,448</b>	<b>151,686</b>	<b>155,956</b>

Source: Scottish Government

**Figures relate to the following:**

UK vessels and main species only (other species are incorporated into totals for demersal, pelagic and shellfish). Volume is by live weight.

**Landing districts are defined as follows:**

Aberdeen - includes Aberdeen, Arbroath, Catterline, Gourdon, Johnshaven, Montrose and Stonehaven.

Peterhead - includes Peterhead, Boddam and Port Errol.

Fraserburgh - includes Fraserburgh, Gardenstown, Macduff, Pennan, Portsoy, Rosehearty, Sandhaven and Whitehills.

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