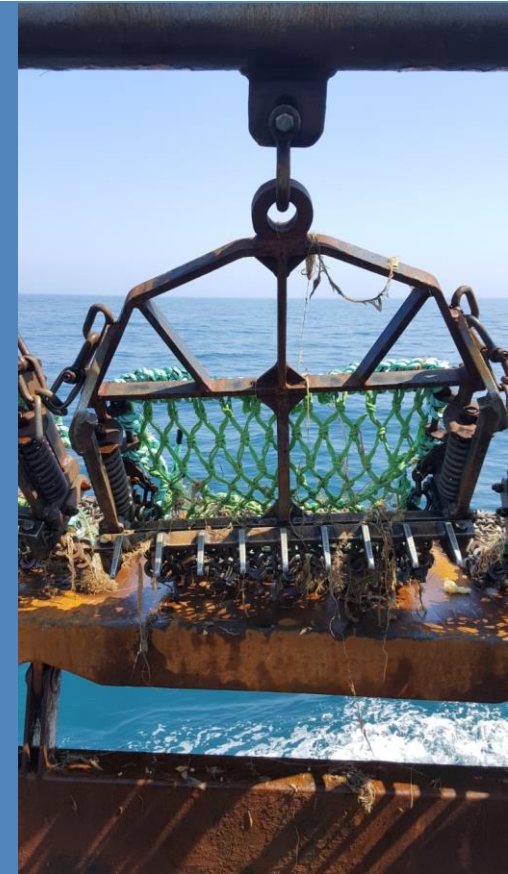




A text-book case study: Economic analysis informing governance and management of scallop fishing in the UK

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IIFET 2018 Seattle



No quotas for scallops in UK & EU waters

Western Waters Management Regime

- Effort restrictions
- Only apply to 10m + vessels
- In practice applied to 15m + vessels

Industry complain to government of falling profits – WWMR at fault – need to change it!

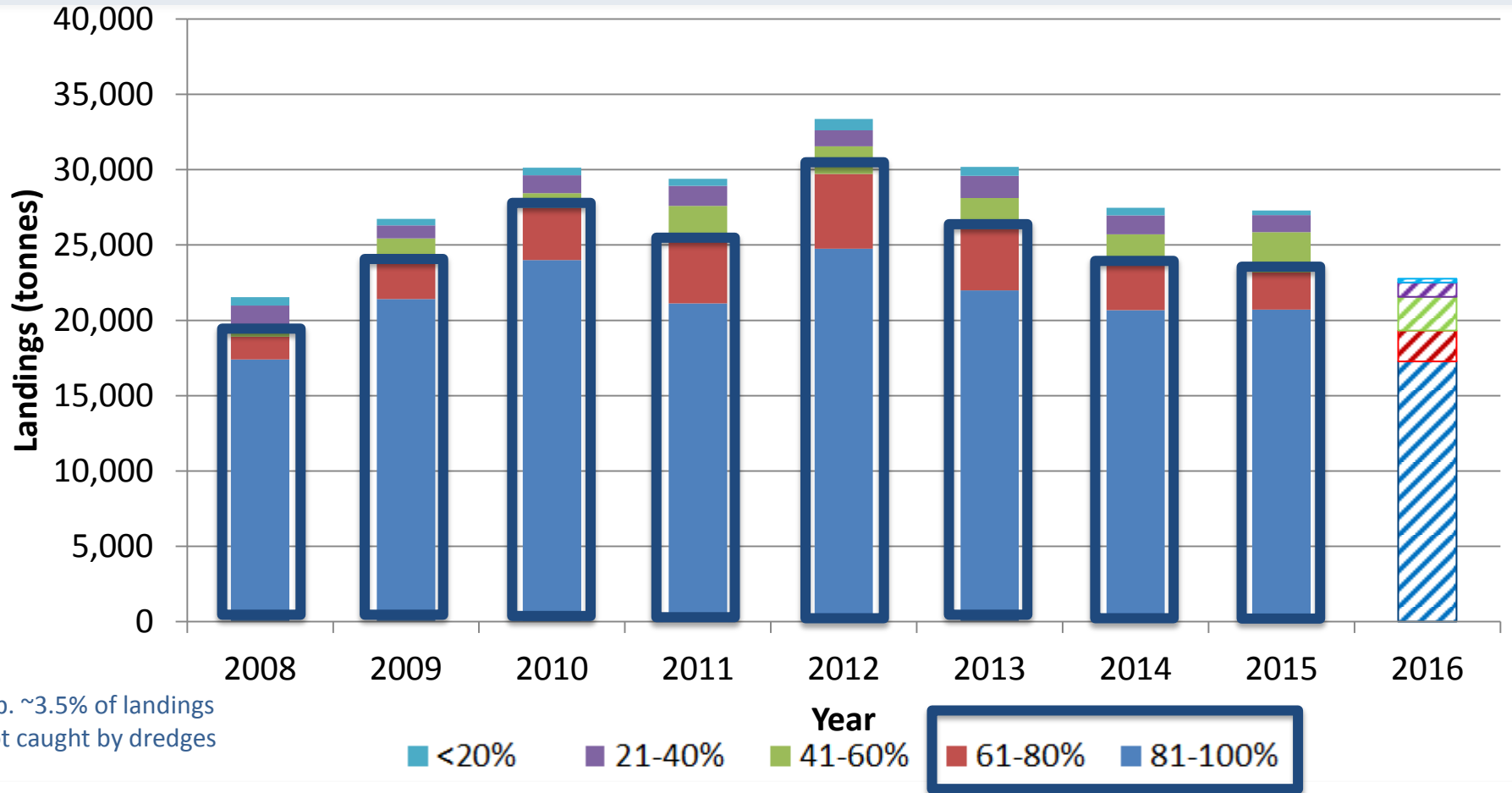
Government: let's see the evidence?

Industry: Let's ask Seafish!

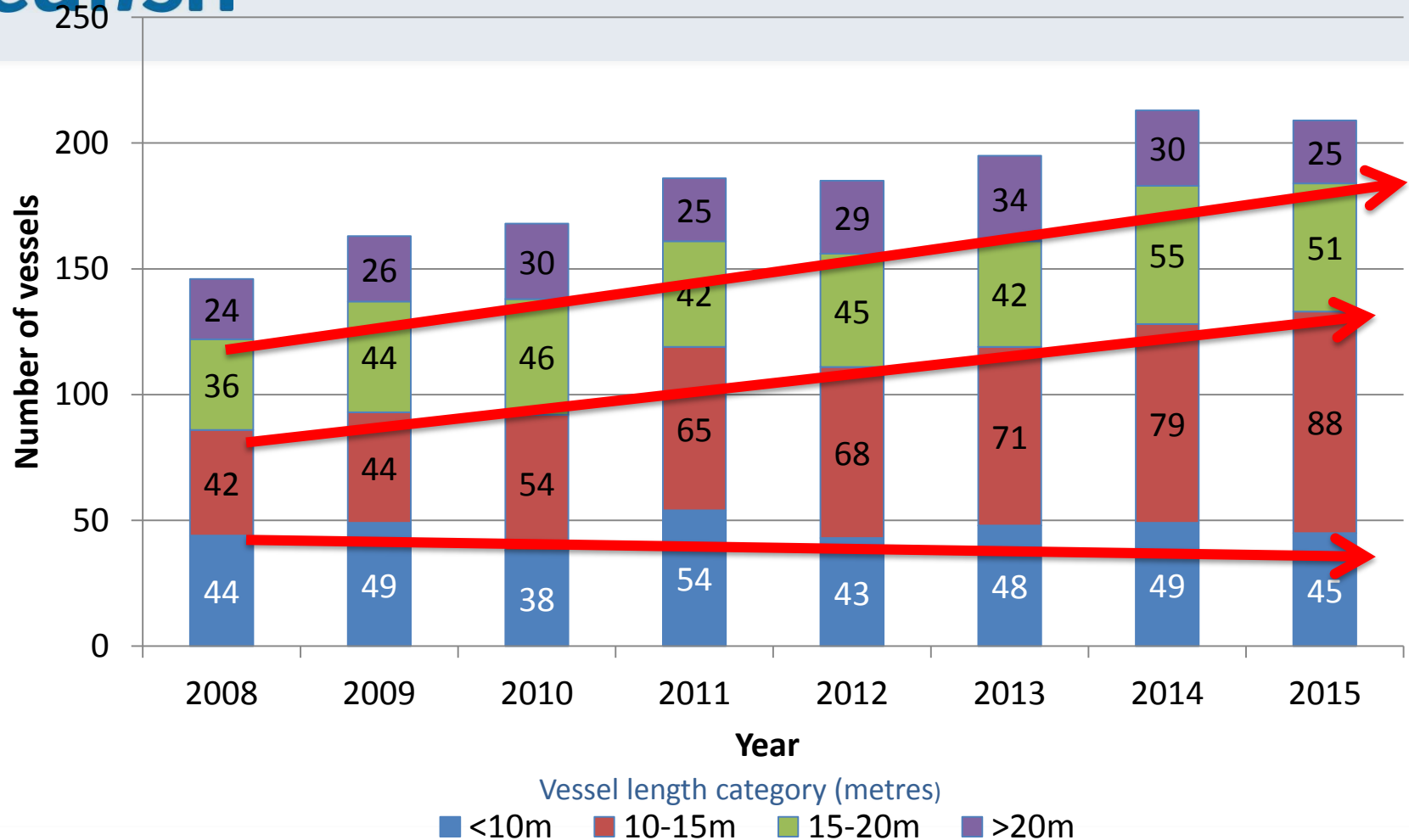
Seafish: data analysed, evidence presented



Landing trends for vessels of different revenue dependence on King scallops

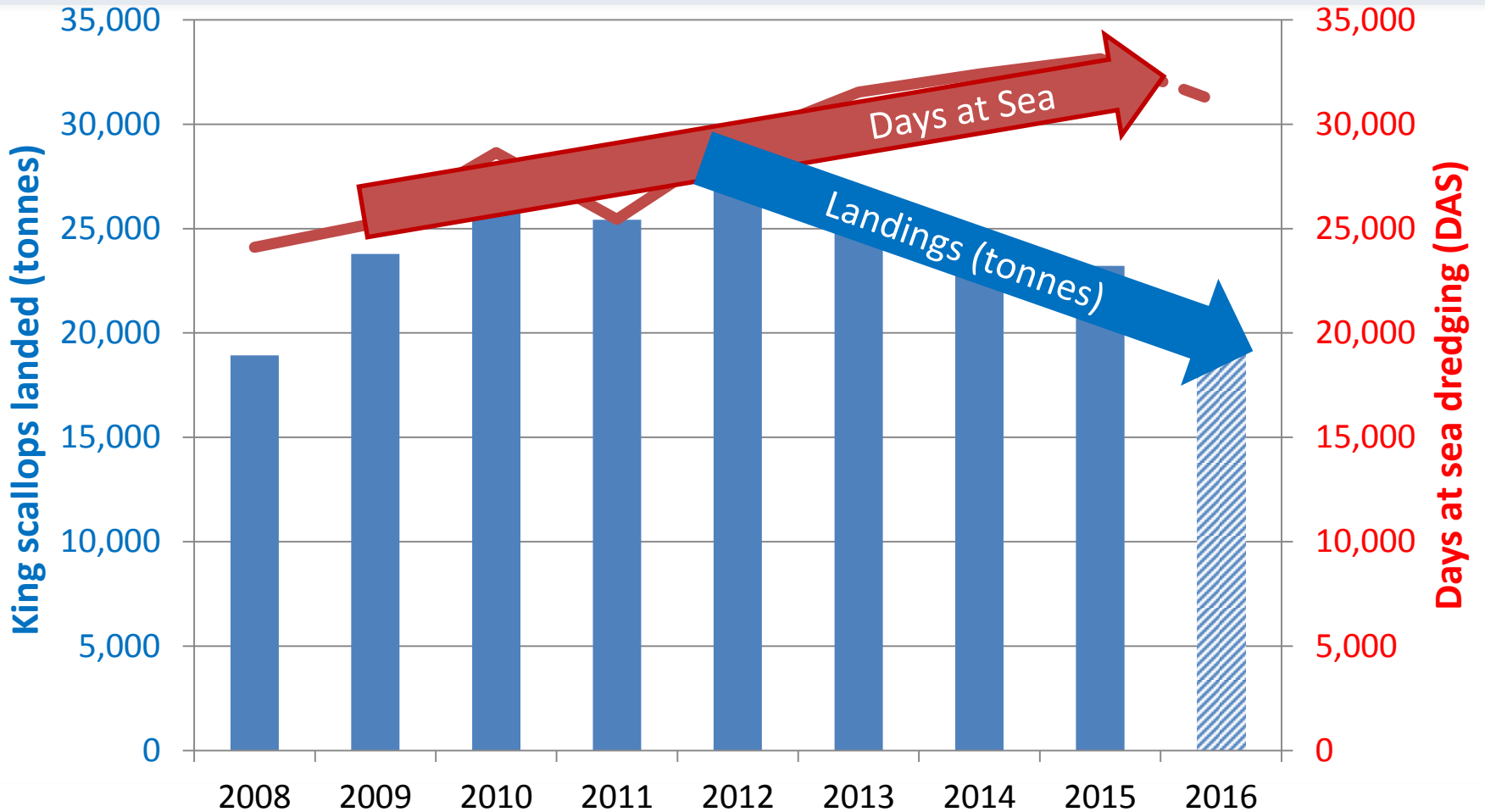


Vessels >60% revenue-dependent on king scallops landed the majority of king scallops in the UK.



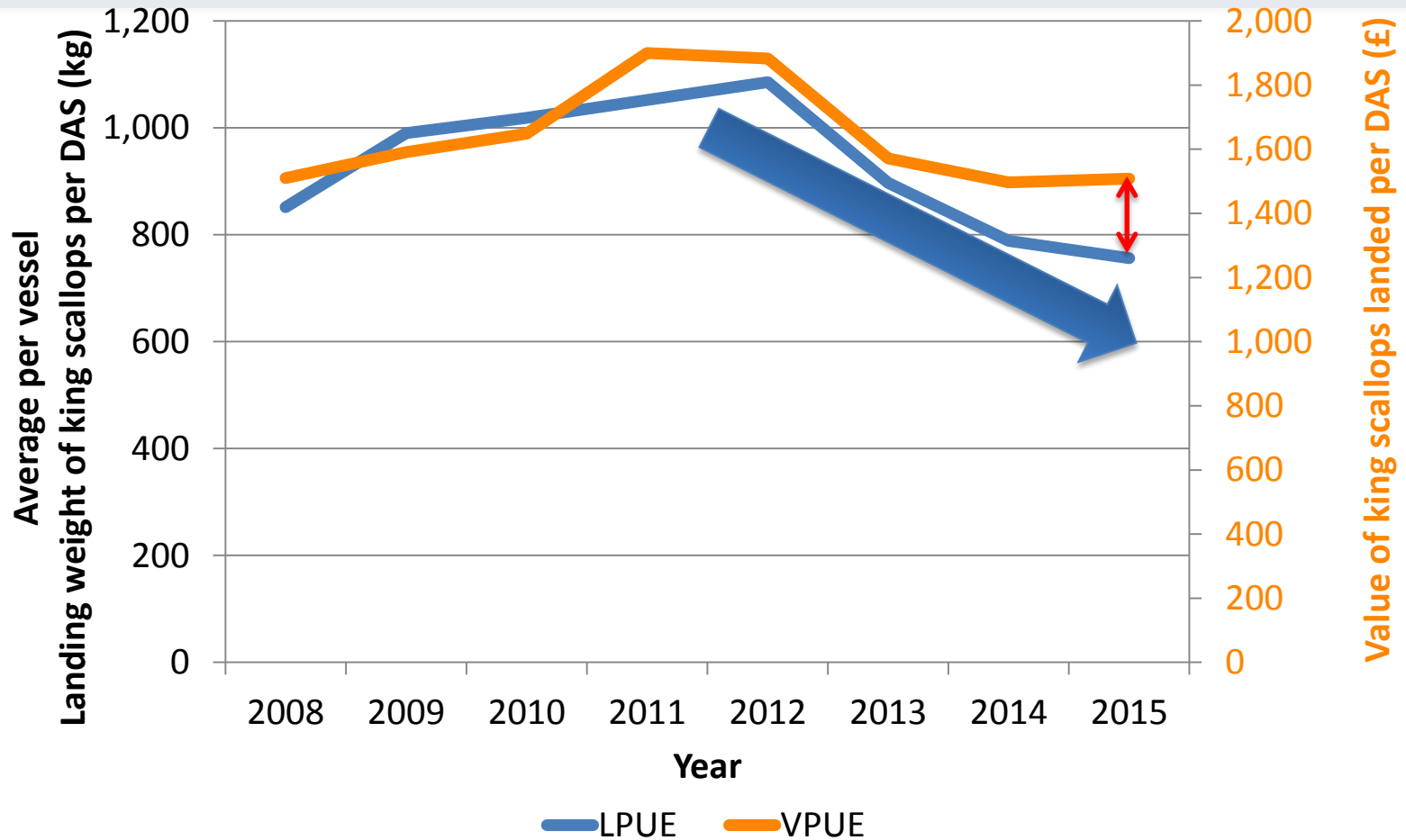
The number of revenue-dependent vessels has been growing

Days at sea and king scallop landings by revenue-dependent vessels



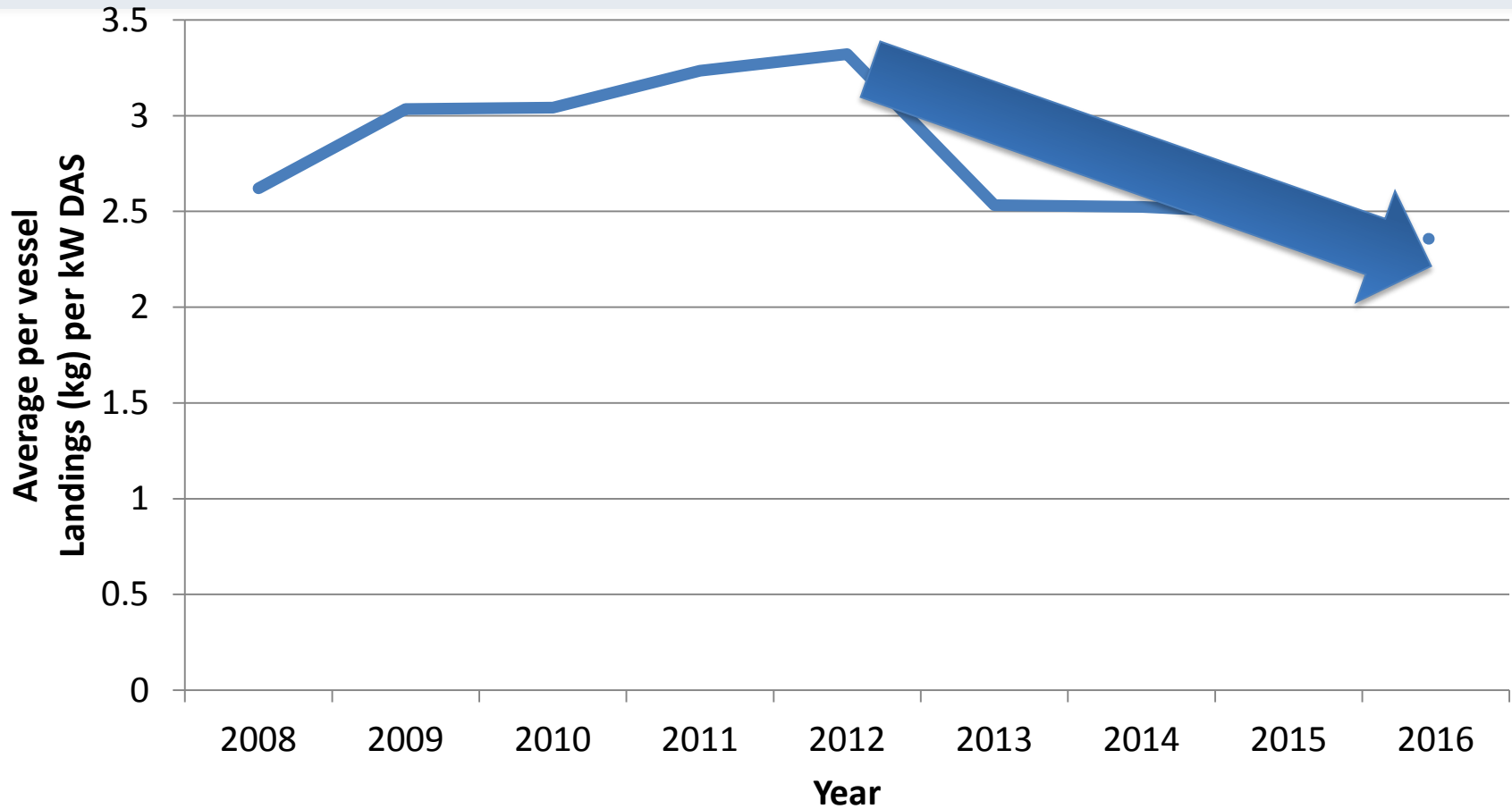
Since 2012, landings of king scallops by revenue-dependent vessels has decreased despite an effort increase.

Average per vessel: Landings per day and Value per day by vessels revenue-dependent on king scallops

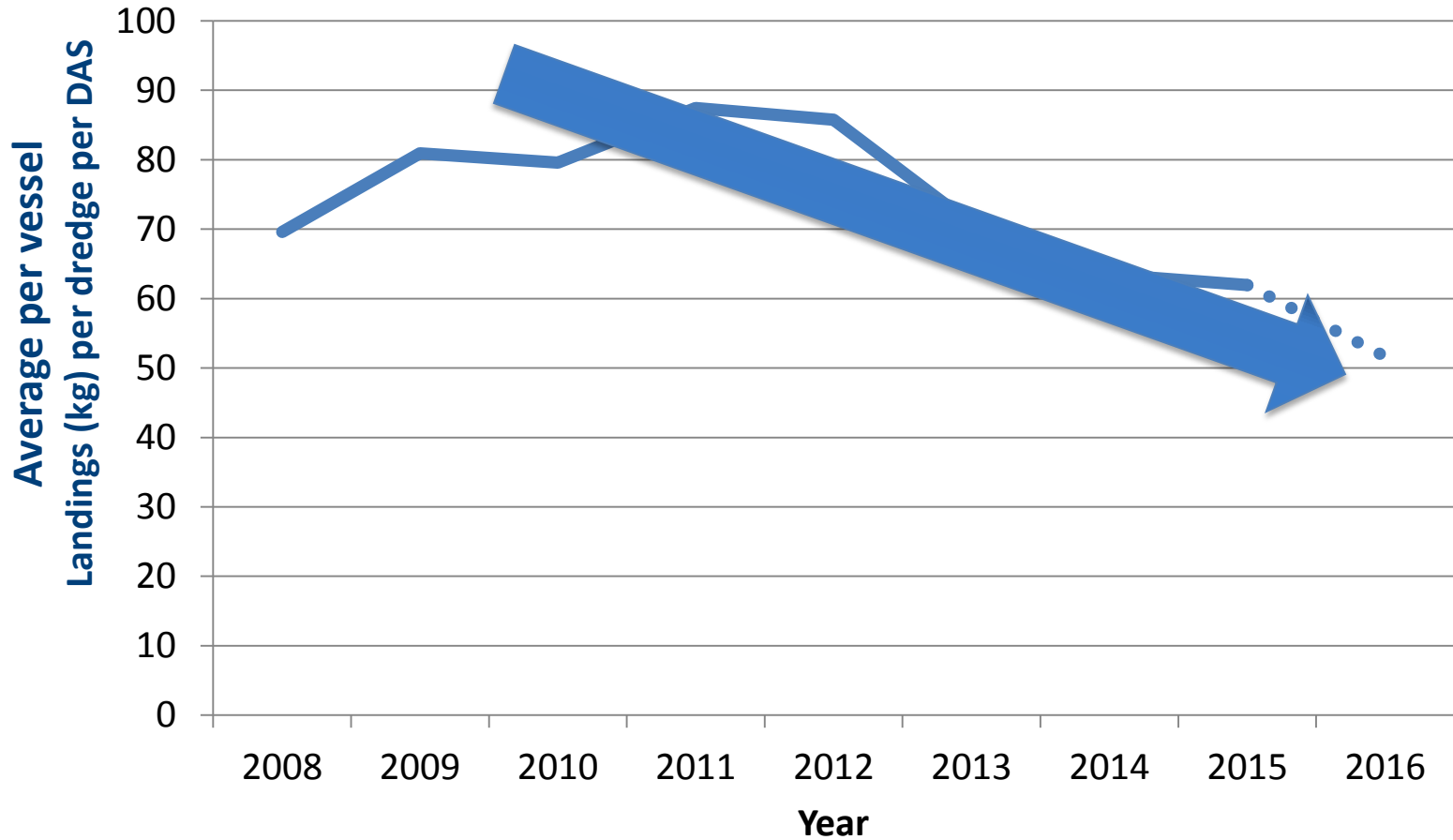


Landings per day and Value per day have declined significantly.

Average per vessel: Landings (kg) per kW day at sea
by vessels revenue-dependent on king scallops

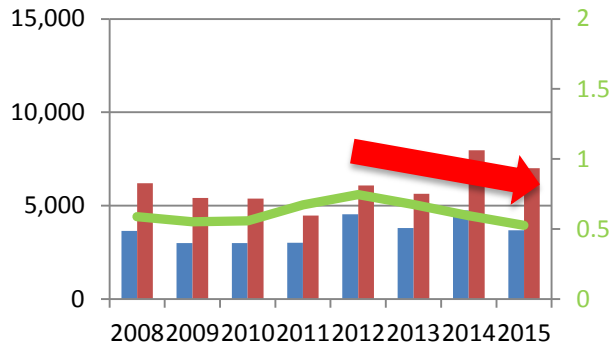


Landings per kW DAS has declined since 2012.

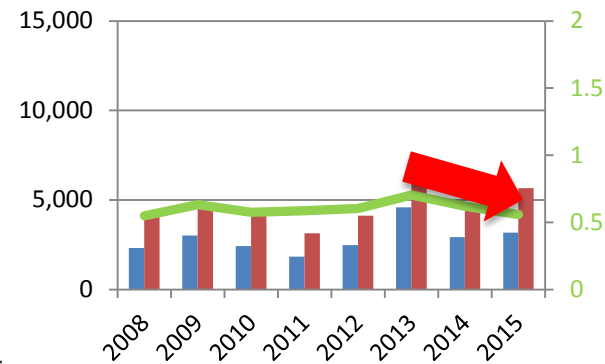


Landings per dredge per DAS has declined since 2011.

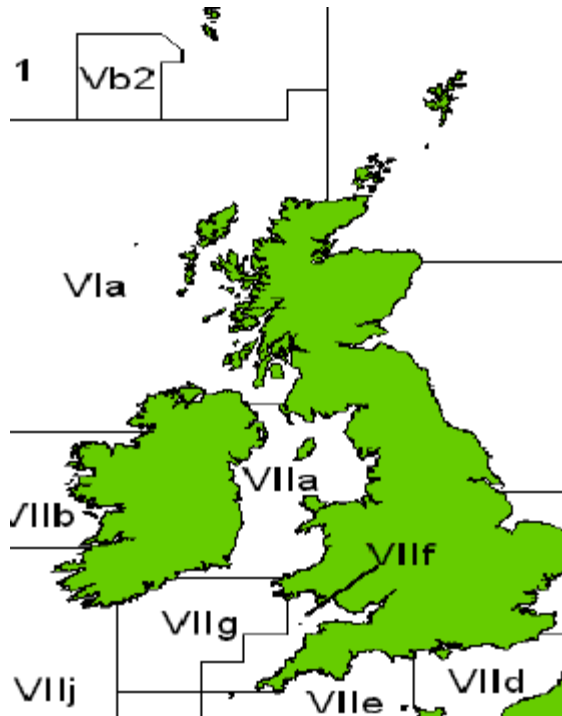
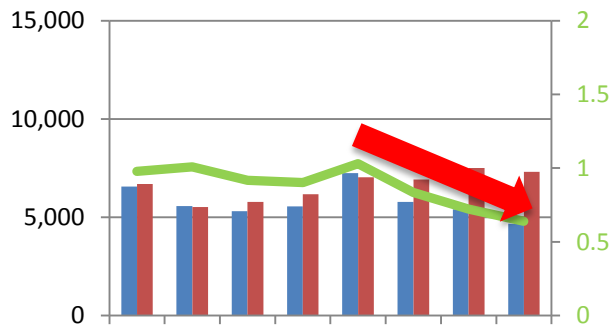
Area 6.a, West Scotland



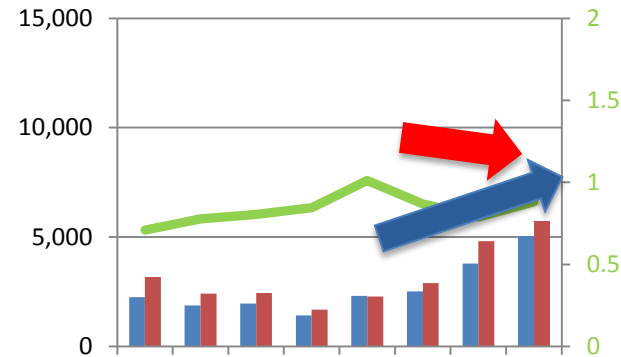
Area 4.a – North, North Sea



Area 7.a,g,f – Irish Sea



Area 4.b,c – North Sea

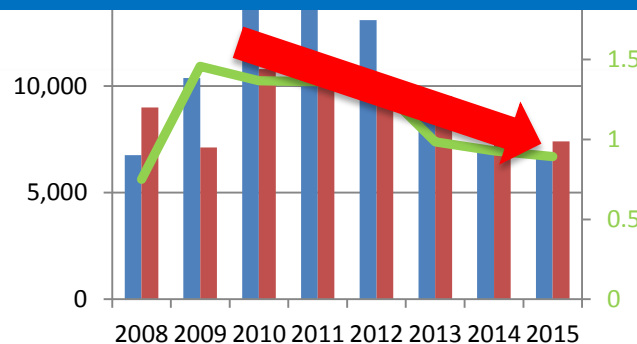


All areas showing declining productivity.

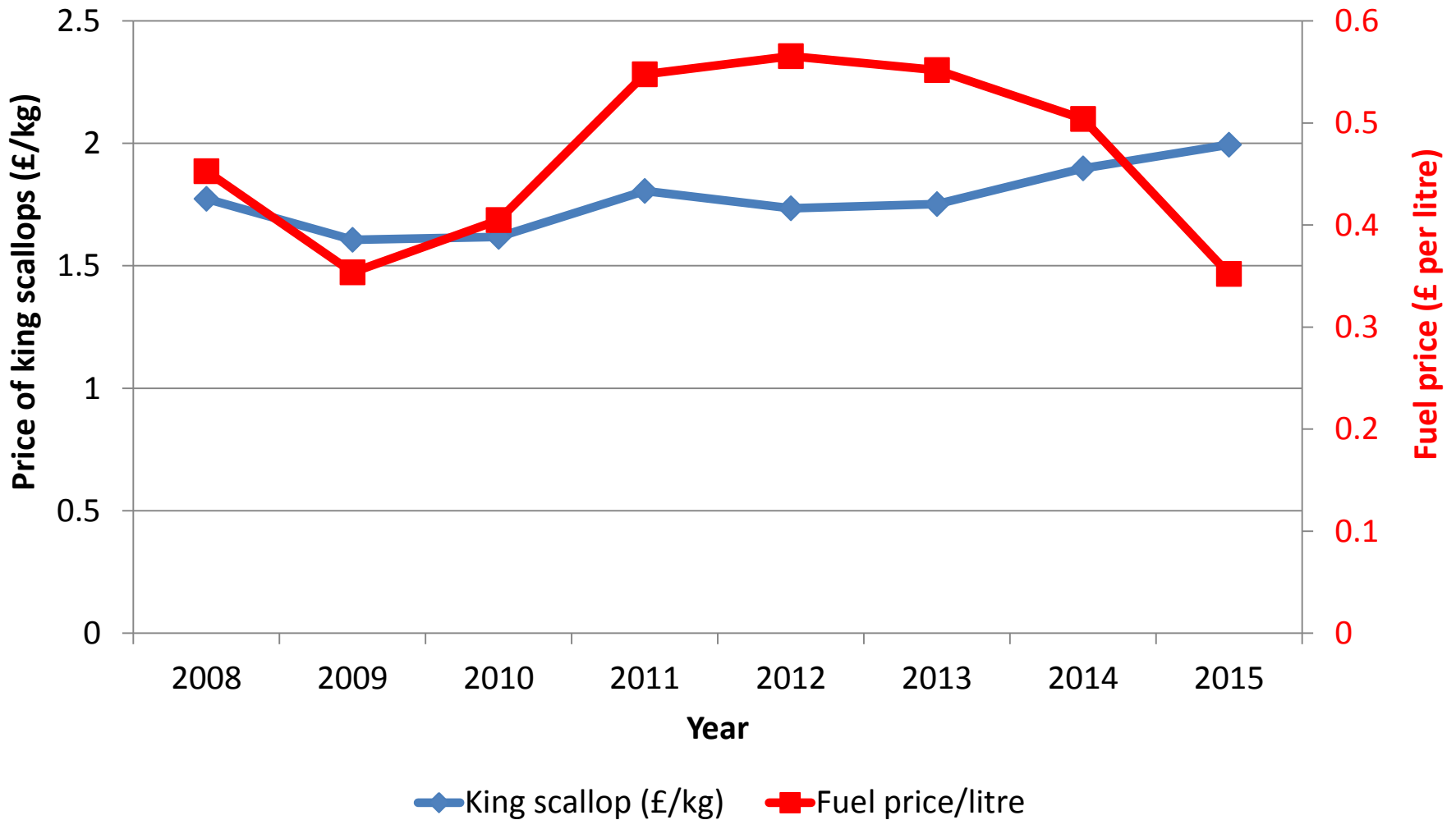
■ Total Landings ■ Total Effort

right axis: Average tonnes/DAS

— LPUE

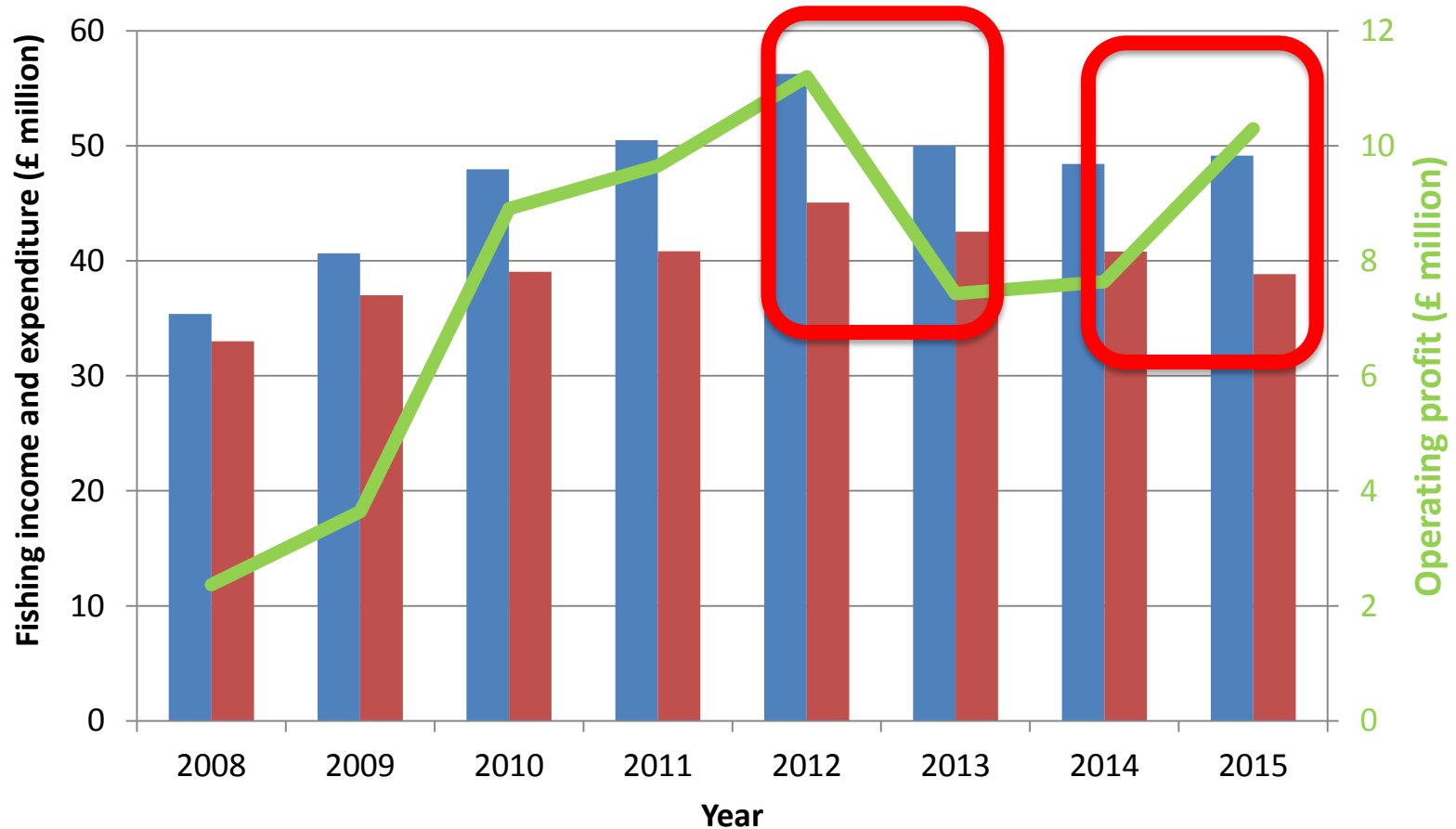


Economics of the fleet (revenue dependent vessels)



Between 2013-2015 fuel price fell significantly and king scallop prices rose.

Economics of the fleet (revenue dependent vessels)



n.b. adjusted for inflation

■ Fishing income ■ Operating costs — Operating profit

2013: big drop in catch rate => fall in operating profit
2013-2015 fuel price fall & king scallop price rise => operating profit increase in 2015.



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