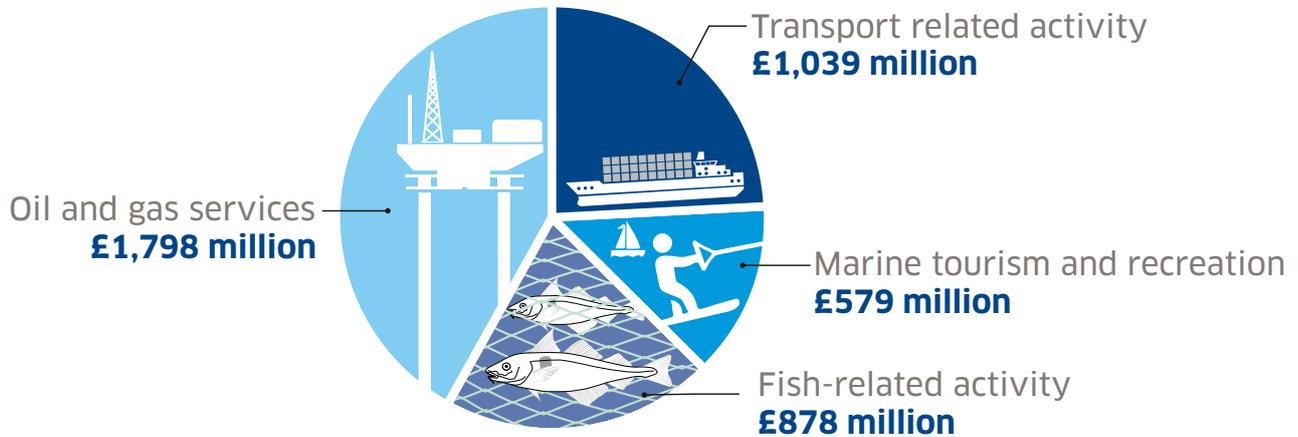


## Scotland's marine economy



GVA of Scotland's marine economy by activity group

### Background

Scotland's marine economy – defined as sectors depending on the marine environment for their output – provides an important source of income and employment across Scotland. In 2018, Scotland's marine economy (excluding oil and gas extraction) generated **£4.3 bn in GVA** and employed **74,200 people**, accounting for **3.0% of total Scottish GVA** and **2.8% of total Scottish employment**.

Scotland's marine economy can be split into four broad activity groups:

- Fish-related activities
- Transport-related activities
- Marine recreation and tourism
- Oil and gas services

Sectors such as marine renewable energy and research and development (R&D) also contribute to the Scottish economy, although comprehensive data covering these are currently limited.



### Fish-related activity

Fishing, aquaculture and fish processing together generated **£0.9 billion in GVA** and employed around **14,700 people** in 2018. This accounted for **0.6% of total Scottish GVA** and **0.6% of total employment**. The fish catching, farming and processing sector helps to support jobs in fragile coastal and rural parts of Scotland.

	Fishing	Aquaculture	Fish Processing
GVA (£m)	301	238	338
Employment (000's)	4.9	2.2	7.6
GVA per Worker (£)	62,002	106,551	44,487

Gross Value Added (GVA) is a measure of the economic value generated by an industry or business. It is defined as the difference between output produced and the cost of producing that output (excluding labour costs).

## Transport activity

	Ship Building, and Maintenance	Construction & Water Transport Service (inc. rent/ lease equipment)	Passenger Water Transport	Freight Water Transport
GVA (£m)	289	573	83	94
Employment (000's)	7.1	4.2	1.5	0.4
GVA per Worker (£)	40,676	136,405	55,467	235,000

Marine transport activities generated **£1.0 billion in GVA and employed around 13,200 people in 2018**. This activity group includes the construction of water projects such as waterways and marinas, water transport service activities including the operation of ports, and the leasing of water transport equipment. Not only do marine transport activities make an important direct contribution to the Scottish economy, they provide the infrastructure that supports other sectors indirectly.

## Marine tourism

Marine tourism and recreation contributed **£579 million in GVA to the Scottish economy and employed 29,700 people in 2018**. Marine and

	Marine Tourism
GVA (£m)	579
Employment (000's)	29.7
GVA per Worker (£)	19,498

## Notes

1. Marine Scotland, Seafish and Data Collection Framework data is used for fishing and aquaculture sectors. All other sectoral data presented are derived from the Scottish Annual Business Statistics publication.
2. Employment figures are head-counts, and not expressed as full-time equivalent (FTEs).
3. Some sector level figures will not reconcile precisely with estimates from other sources. These slight discrepancies are a result of differing methodological approaches.
4. Marine tourism and recreation here covers all tourism businesses located in postcodes within 100 metres of the coastline. Further details are provided in the supporting methodology notes in Scotland's Marine Economic Statistics. <https://www.gov.scot/ISBN/978-1-80004-145-5>
5. Oil and gas extraction is also a key component of the Scottish economy, although estimates are not presented here to remain consistent with UK extra regio (offshore) activity in National Accounts Statistics.

coastal tourism is an important growth sector for Scotland, accounting for around 14% of the total GVA of all tourism. Tourism is an important employer in Scotland's rural areas.

## Oil and gas support services

Oil and gas support services, including exploration services and test drilling, generated **£1.8 bn in GVA and employed 16,600 people in 2018**.

	Oil & Gas Support Services
GVA (£m)	1,798
Employment (000's)	16.6
GVA per Worker (£)	108,295

This topic sheet is a summary snapshot of the [Scottish marine economy in 2018](#). Time series of GVA, turnover and employment for each sector are available on the Scottish Government website:

<https://www.gov.scot/ISBN/978-1-80004-145-5>