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Scottish Sea Fisheries Statistics 2021



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Summary

Sea fish and shellfish landings in 2021

There are signs that some parts of the fishing industry are recovering from the impacts of Covid-19, however there hasn't been a return to pre-pandemic levels:

- Scottish vessels landed 437 thousand tonnes of sea fish and shellfish with a gross value of £560 million in 2021. An increase of 15 per cent in the real value and a 10 per cent increase in the tonnage compared to 2020.
- Compared to 2019, whilst there has been an 11 per cent increase in the tonnage landed, the real value of these landings has fallen by nine per cent.
- The long term trend for the value of the fish landed by Scottish vessels has been generally positive since 2016, with 2020 being an exception.
- Scottish vessels landed 170 thousand tonnes of sea fish and shellfish worth £148 million abroad in 2021. Landings abroad make up 39 per cent of tonnage and 26 per cent by value.

Performance of each sector

The 15 per cent increase in real value landed by Scottish vessels between 2020 and 2021 was driven by shellfish and pelagic species. The actual changes were:

- The real terms value of shellfish landings increased by 29 per cent.
- The real terms value of pelagic landings increased by 18 per cent.
- The real terms value of demersal landings decreased by one per cent.

The 10 per cent increase in tonnage landed by Scottish vessels between 2020 and 2021 results from an increase in shellfish and pelagic fish landings:

- Shellfish landings rose 18 per cent by tonnage and pelagic landings rose 14 per cent.
- Demersal landings decreased by 10 per cent.

Key species

- Mackerel remained the most valuable species in 2021 worth £210 million, making up 37 per cent of the total value of Scottish vessels' landings.
- Monkfish became the most valuable demersal species and represented six per cent of the total value of Scottish vessels' landings.
- In 2021, 1,423 tonnes of creel Nephrops were landed by Scottish vessels with a value of £15 million. Twenty-one thousand tonnes of trawled Nephrops were landed worth £55 million.

The Scottish fishing fleet

The number of active Scottish vessels has remained stable at 2,082, increasing by two per cent compared to 2012:

- The Scottish fleet is dominated by vessels that are ten metres and under in length with a total of 1,573 vessels falling into this category in 2021. There are 509 over 10 metre vessels.
- Compared to 2012, the ten metre and under fleet has increased by 10 per cent while the over ten metre fleet has decreased by 15 per cent.
- The over 40 metre Scottish vessels make up just one per cent of the number of vessels but landed 45 per cent of all landings by value.

Employment on Scottish fishing vessels

- In 2021, 4,241 fishers were working on Scottish vessels, down 70 fishers compared to 2020¹.
- Since 2013, employment on Scottish vessels has fallen six per cent.

¹ The methodology used to calculate the number of fishers has changed in 2022, with changes applying to years 2013 through 2021. See the employment information section in the technical manual for more information: [Scottish sea fisheries statistics: technical manual - gov.scot \(www.gov.scot\)](http://www.gov.scot/publications/scottish-sea-fisheries-statistics-technical-manual-2022/pages/employment-information.aspx).

Figure 1. Overview Statistics Infographic of Scottish landings, fleet and employment 2021

Scottish sea fisheries overview statistics 2021

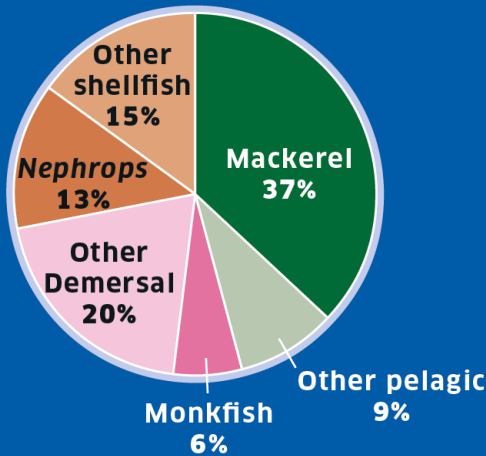
Landings by Scottish registered vessels

437,203 tonnes (↑10% increase) worth £560 Million - (↑15% increase)

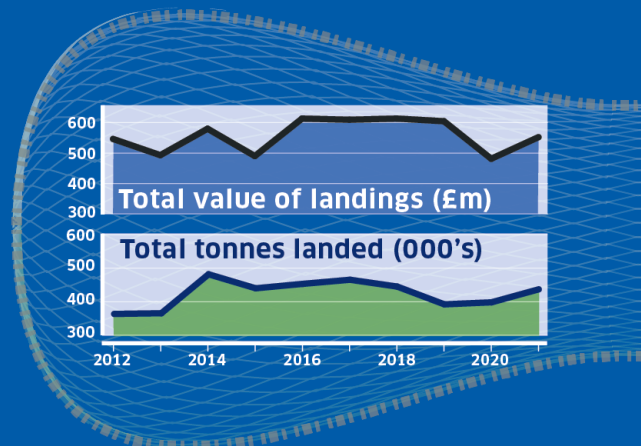


Three most valuable species

% of total value landed



Total values & landings



2,082 Active Scottish registered vessels

509 over 10 metre vessels



1,573 10 metre and under vessels



4,241 Fishers employed



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1 Introduction

Scottish Sea Fisheries Statistics is a National Statistics publication produced by the Marine Analytical Unit (MAU) in Marine Scotland to provide detailed information on the Scottish fishing industry. The statistics presented in this publication include the:

- Tonnage and value of all landings of sea fish and shellfish by Scottish vessels.
- All landings by any nationality of vessel into Scotland and the rest of the UK.
- Landings by UK vessels abroad.
- The size and characteristics of Scottish fishing vessels.
- Employment on Scottish vessels.

All landing tonnages are given in terms of live weight equivalent. Overall financial values in the publication text are provided in real terms (adjusted for inflation to 2021 prices). Most of the financial values in the supplementary tables are provided in nominal terms (not adjusted for inflation). Year on year percentage changes in financial values are calculated at 2021 prices to adjust for inflation.

All tables presented here and in previous publications are available for download from the Scottish Sea Fisheries Statistics publications section of the Scottish Government website².

2 Landings by Scottish vessels

In 2021, Scottish vessels landed 437 thousand tonnes of sea fish and shellfish with a gross value of £560 million (Table 8). Compared to 2020 there was an increase of 15 per cent in the real value of landings and a 10 per cent increase in the tonnage landed.

The increase in real value was driven by shellfish and pelagic species, as demersal species decreased in value.

Shellfish landed by Scottish vessels and included in this publication are crustaceans, molluscs and cephalopods. This includes species such as lobsters and crabs, which are commonly eaten in restaurants. Therefore, hospitality closures due to Covid-19 resulting in a loss of trade and markets particularly affected the shellfish sector in 2020. Markets at home and abroad collapsed as a result of hospitality closures. Despite positive signs, recovery is still ongoing as some restrictions were still in place in 2021, particularly in the hospitality sector.

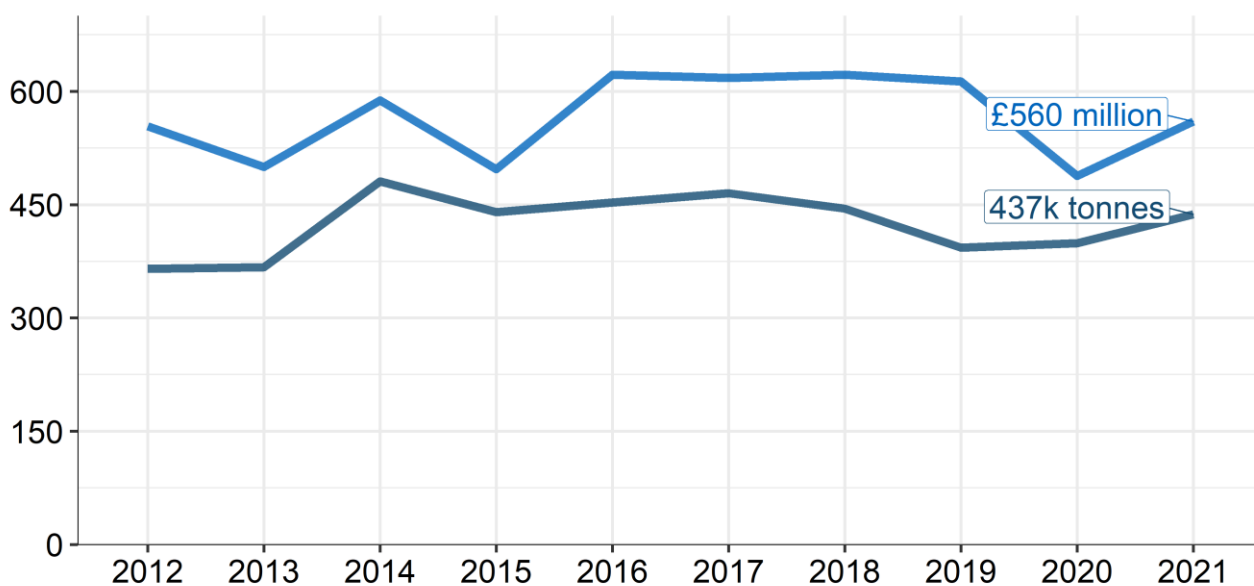
The closure of the restaurant and hospitality sector in the UK and abroad during periods of 2020 and 2021 also impacted the demersal sector. Demersal fish are those which live close to the seabed such as cod, haddock and monkfish. Reduction of quota allocation to Scotland for species such as cod has also negatively impacted the demersal sector.

² Scottish Sea Fisheries Statistics Publications: [Sea fisheries statistics - gov.scot \(www.gov.scot\)](http://www.gov.scot)

The pelagic sector are species found mainly in shoals in midwater or near the surface of the sea such as herring and mackerel. This sector is seasonal and generally operates with larger vessels. It was largely unaffected by the impacts of Covid-19 and increased in tonnage and value in 2020 and again in 2021.

Scotland’s commercial fishing industry comprises a significant proportion of the United Kingdom fishing industry. Landings by Scottish vessels accounted for 61 per cent of the value and 67 per cent of the tonnage of all landings by UK vessels in 2021 (Table 25a).

Chart 1. Total tonnage and value (adjusted to 2021 prices) of all landings by Scottish vessels, 2012 to 2021



Data source: Table 3.

As can be seen in Chart 1, the long term trend for the value of the fish landed by Scottish vessels has been generally stable since 2016, with 2020 being an exception due to the impacts of Covid-19.

2.1 Key species landed

The 15 per cent increase in the real terms value of landings by Scottish vessels, to £560 million between 2020 and 2021, was driven by an increase in the value of shellfish and pelagic species. The real terms value of shellfish landings increased by 29 per cent and pelagic landings increased by 18 per cent compared to 2020, whereas demersal landings decreased by one per cent.

The 10 per cent increase in tonnage landed by Scottish vessels is attributed to an increase in landings of shellfish and pelagic fish. Shellfish landings rose 18 per cent by tonnage and pelagic landings rose 14 per cent. Demersal landings decreased by 10 per cent.

Table 1. Change in total tonnage and value of landings by Scottish vessels between 2020 and 2021^{3,4,5}

Species	Tonnage 2021	Tonnage change from 2020 (percent)	Value 2021 (thousands of pounds)	Value change from 2020 (percent)
Haddock	20,231	-14	28,967	-11
Monkfish	12,612	10	33,747	12
Cod	5,838	-31	20,021	-17
Whiting	10,306	2	14,058	11
Other demersal	28,934	-12	50,655	3
Total demersal	77,920	-10	147,447	-1
Mackerel	185,140	8	209,979	16
Herring	51,438	5	32,711	20
Other pelagic	65,745	46	14,970	39
Total pelagic	302,324	14	257,659	18
Nephrops	22,505	41	70,488	50
Scallops	17,432	20	29,801	10
Edible crabs	8,275	2	18,441	26
Lobsters	1,168	8	17,721	25
Other shellfish	7,580	-10	18,804	5
Total shellfish	56,960	18	155,255	29
Total	437,203	10	560,362	15

Mackerel remained the most valuable species with £210 million landed, accounting for 37 per cent of the total value of Scottish landings. In 2021, the real value of mackerel landings increased by 16 per cent and tonnage increased by eight per cent. This increase is in line with an increase in available quota. Quota is the share of the fish catch allowed to vessels. Scottish vessels' landings accounted for just over four fifths (82 per cent) of UK mackerel landings by tonnage and 86 per cent by value.

Scottish vessels commonly catch a wide variety of demersal species, including more than a dozen species with landings that are worth £1 million or more annually (Table 8). Monkfish became the most valuable demersal species and represented six per cent of the total value of Scottish vessels' landings and 23 per cent of the value of demersal landings in 2021.

Nephrops are the most valuable shellfish stock and the only shellfish species currently subject to quota. Scottish vessels fish for Nephrops by creeling and by trawling. Creeled Nephrops are often caught and exported live. Creeled Nephrops represent a smaller tonnage of landings, but attract an average price per tonne four times that of trawled Nephrops. Some trawled Nephrops are sold whole but the majority are sold as tails for turning into scampi. In 2021, 1,423 tonnes of creeled Nephrops were landed by Scottish vessels with a value of £15 million⁶. Twenty-one thousand tonnes of trawled Nephrops were landed worth £55 million. These data are presented in Table 30c.

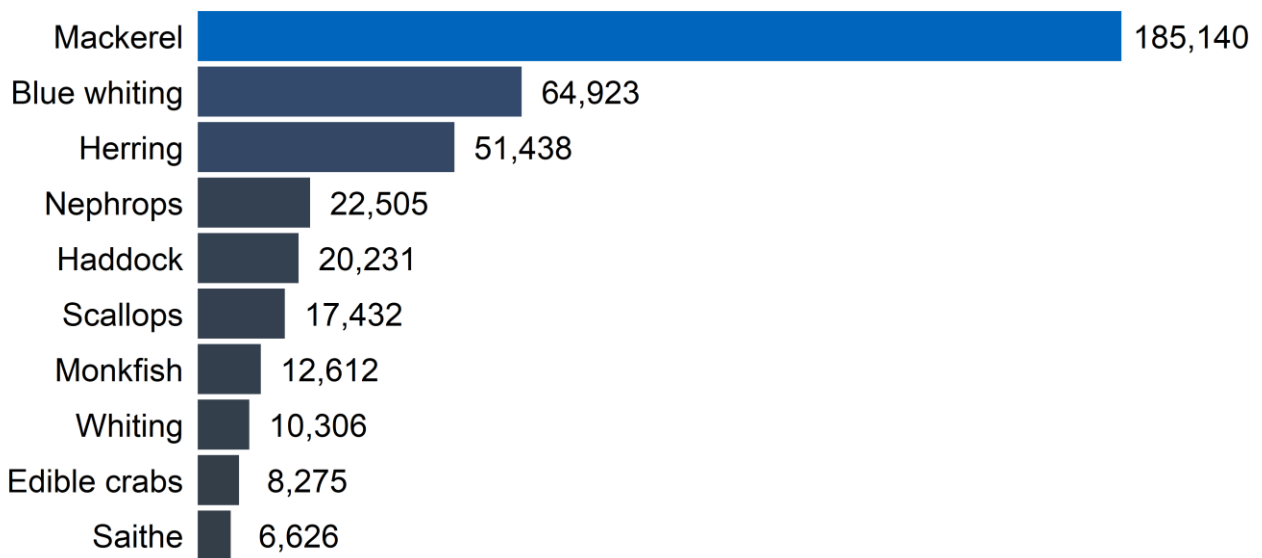
³ Values are based on 2021 prices and percentage changes reflect real changes after adjusting for inflation. The deflator applied can be found here: [GDP deflators at market prices, and money GDP June 2022 \(Quarterly National Accounts\) - GOV.UK \(www.gov.uk\)](#)

⁴ Percentages are based on unrounded data and may differ from calculations using rounded data in tables.

⁵ Values may not sum to their respective totals due to rounding.

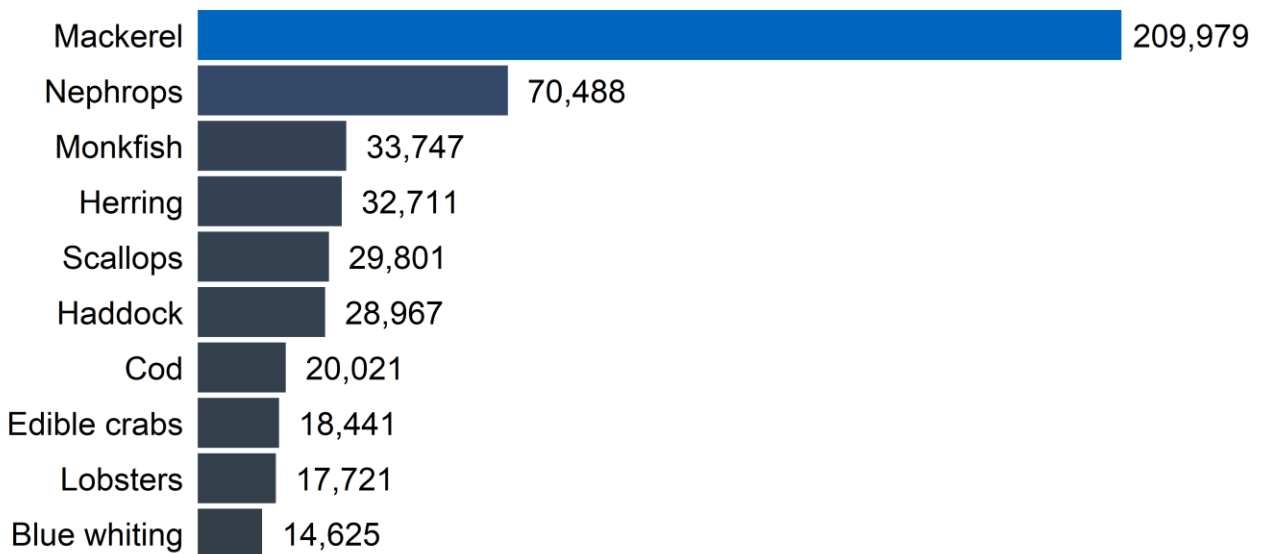
⁶ The values in Table 30c. Scottish vessels' landings by gear type are slightly lower than Table 8, because some Nephrops are also caught by demersal gear types. Other species may also be effected by this.

Chart 2. Scottish vessel's most commonly landed fish species by tonnes landed in the UK and abroad, 2021



Data source: Table 8.

Chart 3. Scottish vessel's highest value landed fish species by thousands of pounds landed in the UK and abroad, 2021



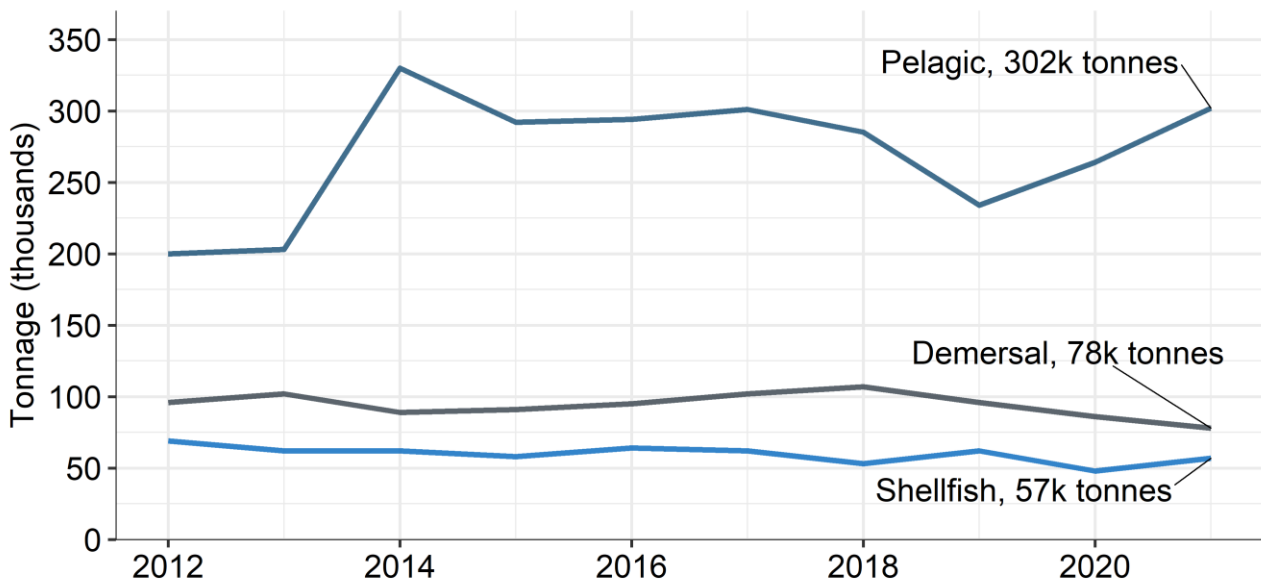
Data Source: Table 8.

Long term sector trends

Over the past ten years 2012-2021, the tonnage of pelagic landings has increased by 51 per cent with real terms value increasing by 31 per cent.

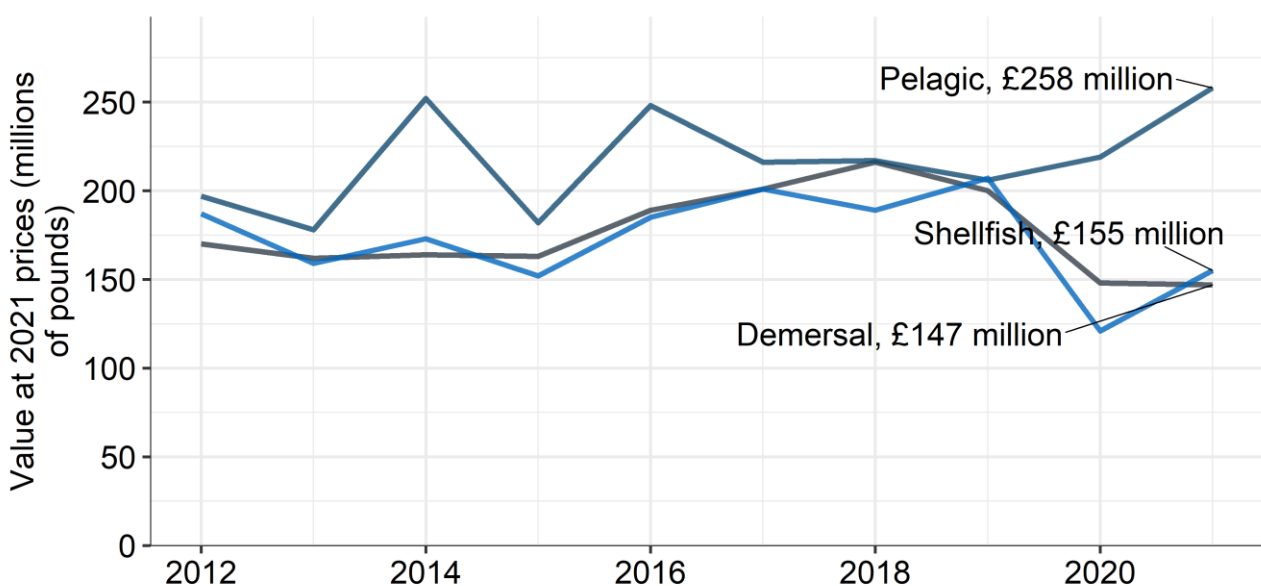
Compared to 2012, the tonnage of demersal landings fell by 19 per cent with real terms value decreasing by 13 per cent. Over the period 2012 to 2021, shellfish landings and real terms value have both fallen by 17 per cent. The decreases for shellfish and demersal are unlikely to be a long-term decrease and more a reflection of the decrease in 2020 and 2021 (compared to 2019) due to the impact of Covid-19.

Chart 4. Tonnage of landings by Scottish vessels by species type, 2012 to 2021



Data source: Table 3.

Chart 5. Value (adjusted to 2021 prices) of landings by Scottish vessels by species type, 2012 to 2021



Data source: Table 3.

Fish prices

Scottish vessels land a vast range of different species throughout the year and they all achieve different prices at auction. The price achieved will vary by species, individual market, supply, demand, seasonality and the condition of the fish. Table 2 shows the average price per tonne for a selection of species landed by Scottish vessels.

Table 2. Change in price per tonne of species landed by Scottish vessels between 2020 and 2021⁷⁸⁹

Species	Price per tonne 2021 (pounds)	Price per tonne 2020 at 2021 prices (pounds)	Price per tonne change from 2020 (percent)
Mackerel	1,134	1,060	7
Nephrops	3,132	2,942	6
Monkfish	2,676	2,623	2
Herring	636	557	14
Scallops	1,710	1,866	-8
Haddock	1,432	1,390	3
Cod	3,429	2,865	20
Edible crabs	2,229	1,797	24
Lobsters	15,171	13,045	16
Blue whiting	225	231	-2

It is clear that there is great variation in the prices achieved across the different species. Mackerel is the highest value species for Scottish vessels yet has a much lower price per tonne than many other species. It is the vast tonnage of mackerel caught that leads to the value being so high.

Lobsters have the highest price per tonne yet a fairly low value compared to other main species. This is due to seasonality, lobster is not in season during several months of the year resulting in a lower tonnage landed throughout the year compared to other species. They are also considered a luxury food and tend to be purchased mainly by the hospitality sector.

Total Allowable Catches quota and uptake

Total Allowable Catches (TAC) are limits set at annual international negotiations for individual fish stocks and represent the maximum of each fish stock that can be caught. Up until 2020, while the UK was still a member of the European Union (EU) the majority of stocks were managed and fished only by EU member states. Member states access to management and fishing of stocks were based on a number of factors, including historic track record. The TACs for these stocks were set by the European Commission through internal negotiations between EU member states with an interest and based on independent scientific advice from ICES. The remaining stocks were managed and shared with other Coastal States: Norway, Iceland, the Faroe Islands, Greenland and Russia, with TACs for these set at separate negotiations. The amounts corresponding to this share,

⁷ Values are based on 2021 prices and percentage changes reflect real changes after adjusting for inflation. The deflator applied can be found here: [GDP deflators at market prices, and money GDP June 2022 \(Quarterly National Accounts\) - GOV.UK \(www.gov.uk\)](#)

⁸ Percentages are based on unrounded data and may differ from calculations using rounded data in tables.

⁹ Values may not sum to their respective totals due to rounding.

known as quotas, are shown at the UK and at the Scottish Producers Organisations' (POs) level in tables 36a to 36d.

Uptake of key commercial quota stocks by all Scottish vessels by tonnage and value landed are presented in table 37. In general, Scottish POs had high quota uptake in 2021 for key demersal and pelagic species. Uptake of mackerel stocks in the North Sea was above 90 per cent and uptake of mackerel stocks in the West of Scotland exceeded quota¹⁰.

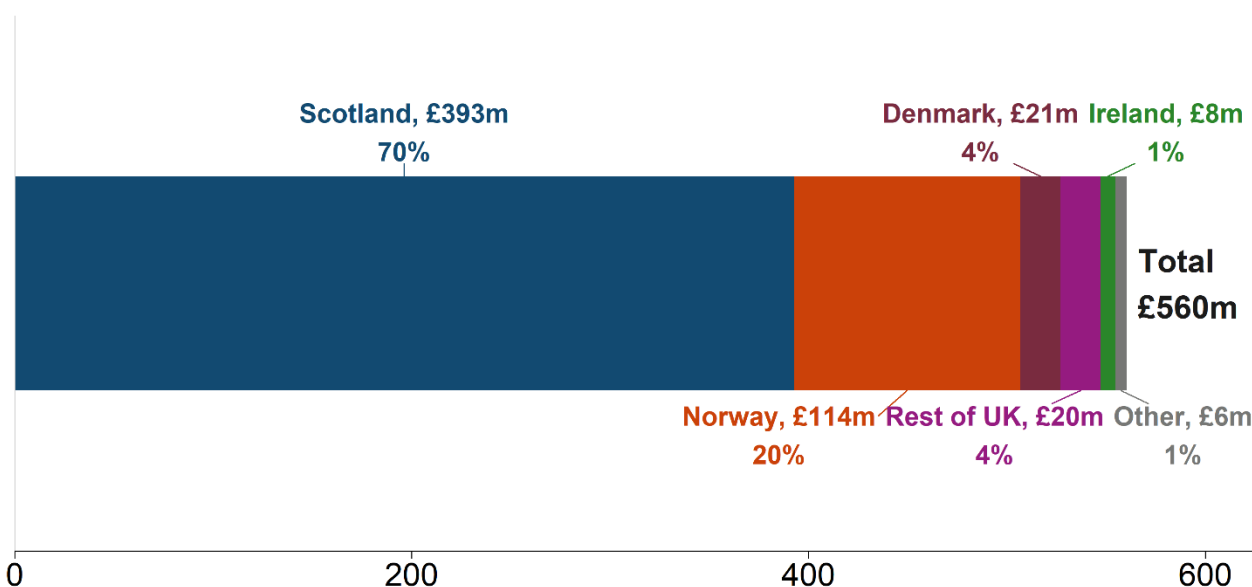
For demersal stocks, uptake in the North Sea was generally high with cod quota uptake at 99 per cent and monkfish at 91 per cent. West of Scotland cod has a nil quota and is managed as a bycatch. The Scottish quota reduction for cod of more than 66 per cent between 2019 and 2021 led to an increased pace of quota uptake, reflecting the importance of this species to the domestic fleet.

The only shellfish species subject to quota is Nephrops. In 2021, Scottish PO quota uptake for North Sea Nephrops was 91 per cent and for West Coast Nephrops it was 65 per cent. This is 30 percentage points up compared to 2020 for the North Sea and 21 percentage points up for the West Coast.

2.2 Where Scottish vessels land their fish

Scottish vessels land their catches into Scotland, the rest of the UK and several countries abroad. In 2021, Scottish vessels landed 170 thousand tonnes of sea fish and shellfish worth £148 million abroad.

Chart 6. Top countries Scottish vessels landed their catch into by value (millions of pounds), in 2021



Data source: Table 4, Table 5, Table 8, Table 28.

¹⁰ Landings can exceed quota if POs or vessels 'carry over' some quota from a previous year into the next year, within agreed limits. There is also an allowance so that a country can exceed up to ten per cent of its quota on a particular stock and the excess is deducted from the following year's quota allocation.

Landings abroad accounted for 39 per cent of all landings by Scottish vessels by tonnage and 26 per cent by value. Of this, 93 per cent of the tonnage landed abroad was pelagic.

The main species landed abroad was mackerel, representing 77 per cent of the total value of fish landed abroad in 2021. There were 100 thousand tonnes of mackerel worth £114 million landed abroad, which is both 54 per cent of the total tonnage and value of mackerel landed by Scottish vessels.

Norway is by far the largest destination for Scottish vessels' landings abroad, accounting for 20 per cent by value of all Scottish vessels' landings and 77 per cent by value of all landings abroad. In 2021, 89 per cent of the value of landings into Norway was for mackerel, amounting to 89 thousand tonnes with a value of £101 million.

Area of capture

Scottish vessels are most active in two main ICES Rectangles¹¹ : the Northern North Sea (ICES Area IVa) and the West Coast of Scotland (ICES Area VIa).

In 2021, 212 thousand tonnes of sea fish and shellfish with a value of £306 million were landed from the Northern North Sea (IVa), representing 48 per cent of the tonnage and 55 per cent of the value of all landings by Scottish vessels (Table 31).

Over one third (34 per cent) of landings by Scottish vessels, by tonnage were caught in the West Coast of Scotland (VIa), providing 31 per cent of the total value of all Scottish landings.

Area VII accounted for nine per cent of the tonnage of all landings and five per cent of value.

3 Landings into Scotland

In 2021, 283 thousand tonnes of sea fish and shellfish with a value of £438 million were landed into Scotland. This represents a one per cent decrease in tonnage and an eight per cent increase in real terms value from 2020.

Pelagic species accounted for 51 per cent of the tonnage landed into Scotland whilst demersal species made up 34 per cent and shellfish species 16 per cent. By value, 40 per cent of landings into Scotland were demersal species, 32 per cent were shellfish and 28 per cent were pelagic species. The differences in shares by tonnage and value reflect the differences in average prices per tonne (for landings by Scottish vessels) across the species types: shellfish sell at relatively higher average prices per tonne, whilst pelagic species receive the lowest average prices per tonne (Table 26).

Figures 1 and 2 show landings by all vessels into the eighteen Scottish port districts. The top three districts in Scotland by total tonnage landed were Peterhead (east coast), Shetland (northern island) and Scrabster (north-east coast). Peterhead is the single largest fishing port in the UK by tonnage and value of landing. Information on landings into all the Scottish districts can be found in table 32.

¹¹ ICES is the International Council for the Exploration of the Sea.

Figure 2. Tonnage landed into Scotland by all vessels by district in 2021

Tonnage landed, by district, during 2021

Scottish Government (2022). Contains information licensed under the Open Government Licence v3.0

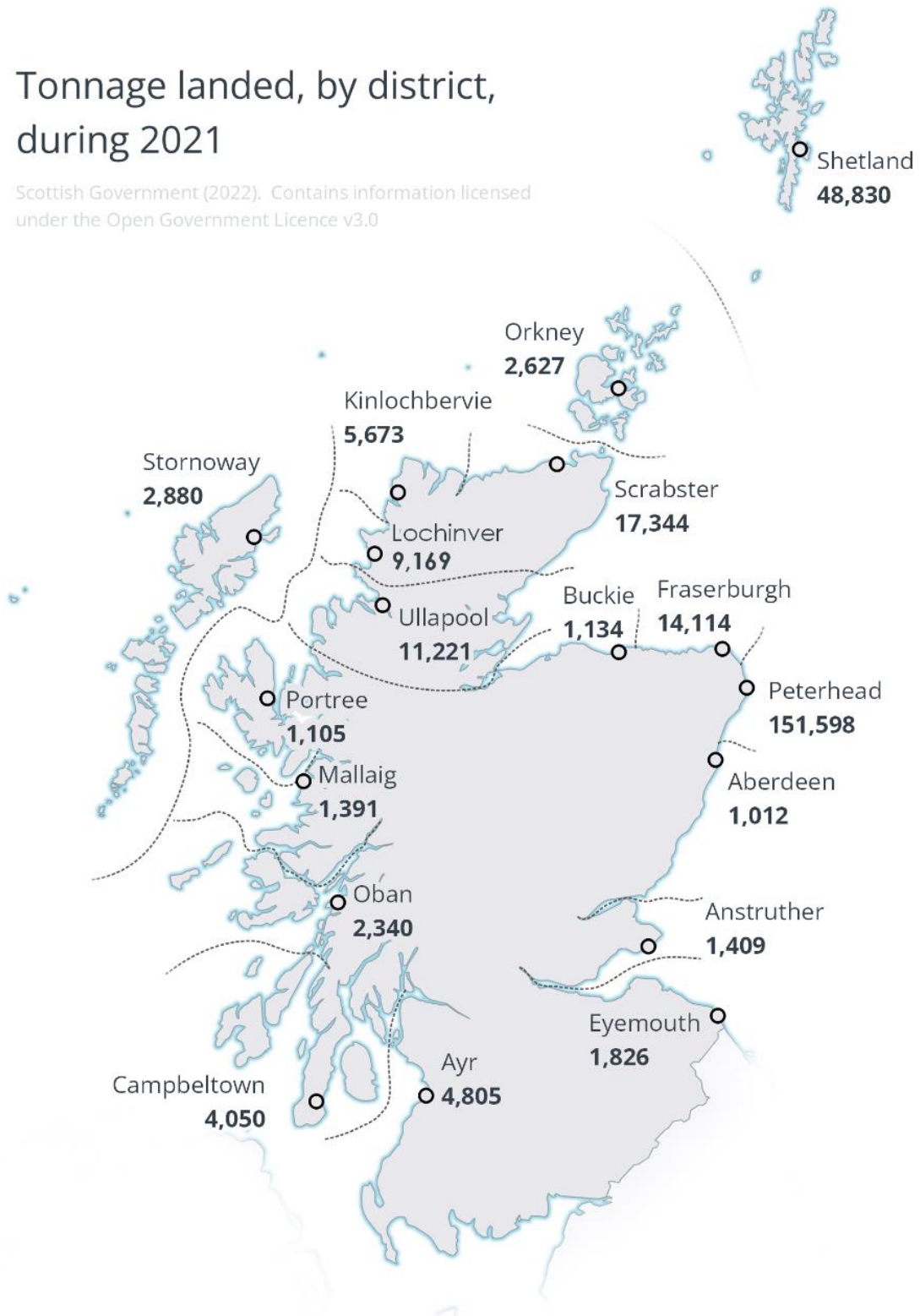
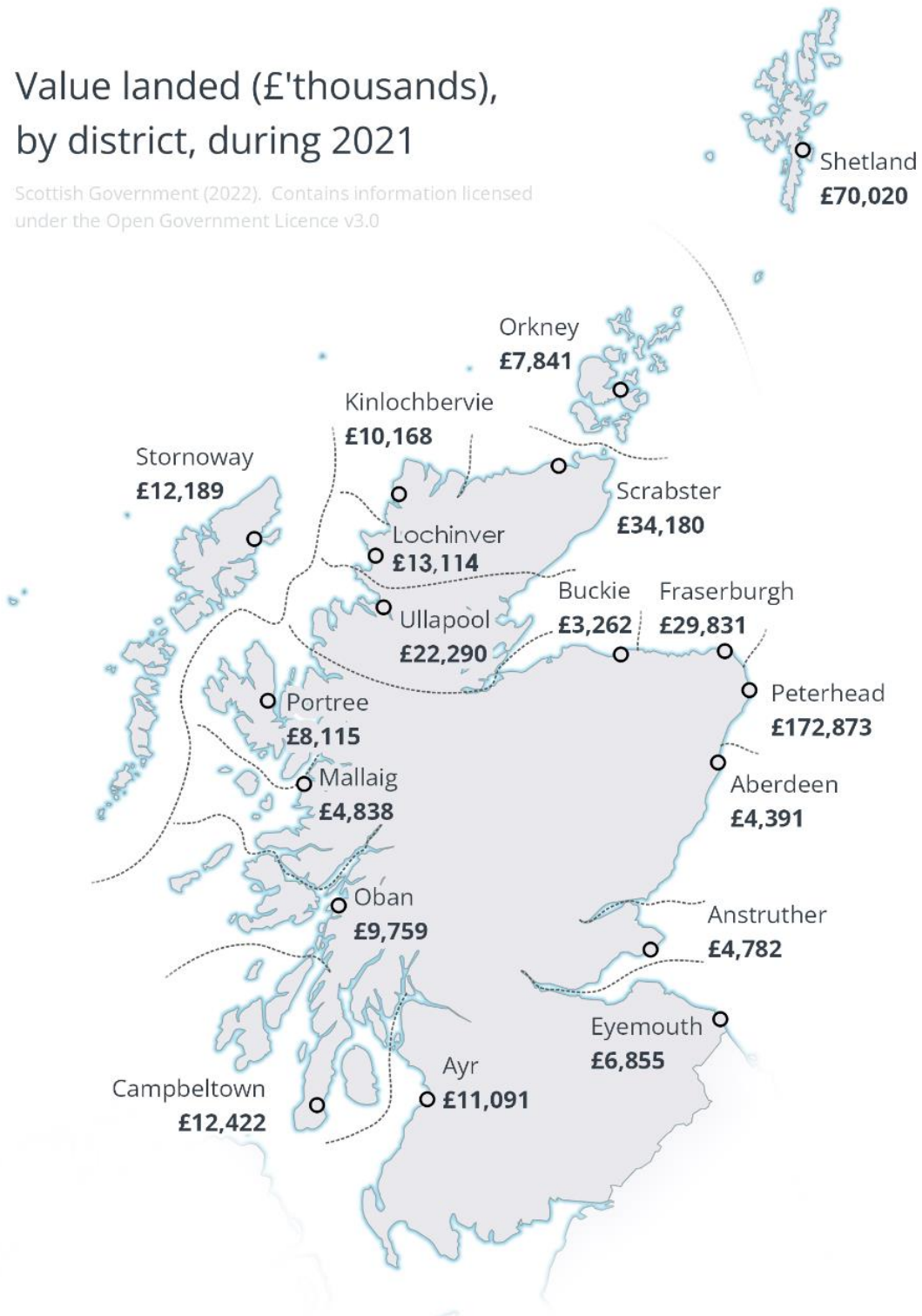


Figure 3. Value (thousands of pounds) landed into Scotland by all vessels by district in 2021

Value landed (£'thousands),
by district, during 2021

Scottish Government (2022). Contains information licensed under the Open Government Licence v3.0



4 The Scottish fishing fleet

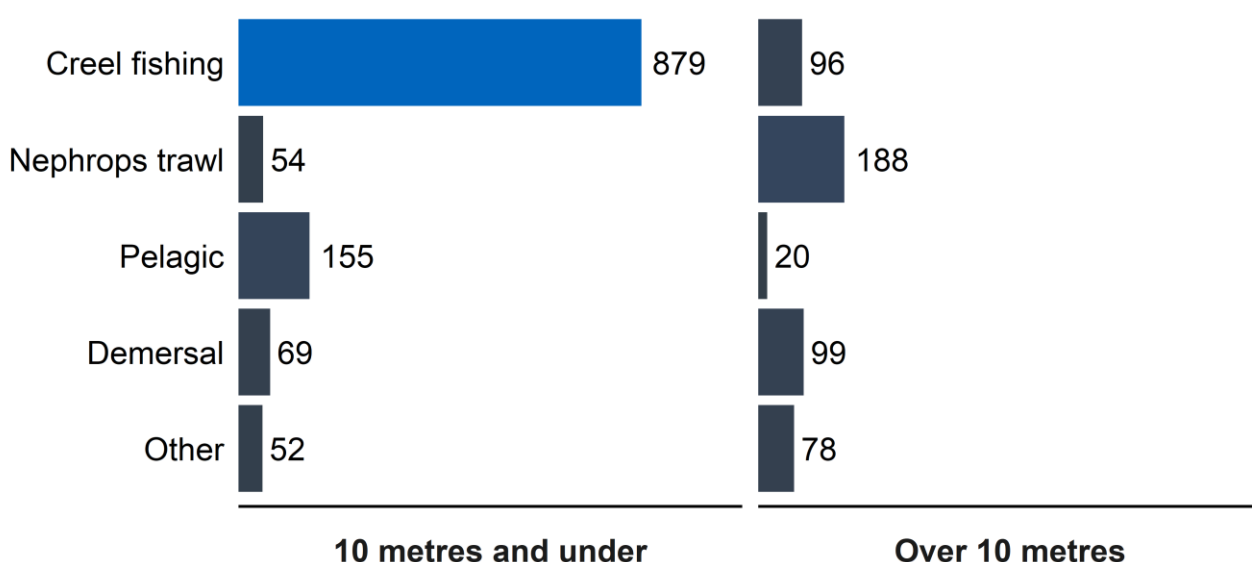
UK fishing vessels are required by law to be registered with the Registry of Shipping and Seamen (RSS), part of the Maritime and Coastguard Agency. Fishing vessels must also have a licence that specifies conditions that must be adhered to. For the purpose of this publication, active vessels are those that are both registered and licensed as at 31st December of that year. Scottish-based vessels are those registered to a port in Scotland licensed and administered by a Scottish district. Each district contains a Marine Scotland Fishery Office which is responsible for administering the vessels and licences within that area. UK fishing vessel licences authorise the sea areas in which a vessel can fish and the species of fish that can be caught.

The capacity of fishing vessels in terms of gross registered tonnage and kilowatt engine power is also controlled through licences. With a finite amount of licence capacity in existence and no plans to make new capacity available, this restricts the total number and capacity of vessels in the UK fishing fleet. In order to licence new vessels, fishers must acquire existing licences from other previously licensed vessels. They also have the option of aggregating or disaggregating licence components to fit the requirements of the vessel in question.

4.1 The size of the Scottish fleet

The number of active Scottish based vessels has decreased to 2,082 vessels in 2021, a reduction of six vessels since 2020. The Scottish fleet is dominated by vessels that are ten metres and under in length with a total of 1,573 vessels falling into this category in 2021, accounting for 76 per cent of the Scottish fleet. There are 509 over 10 metre vessels.

Chart 7. Number of active Scottish vessels by main fishing method and length, 2021



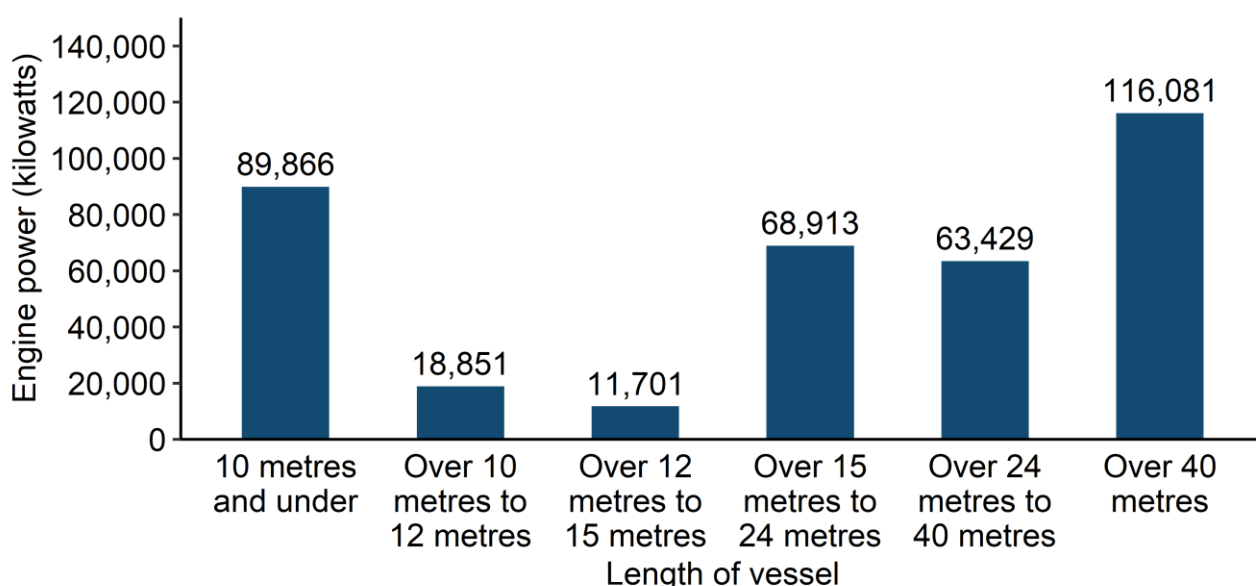
Data source: Table 43.

Chart 7 excludes active Scottish vessels that did not land any fish in 2021, these are recorded as non fishing in the tables. In 2021, there were 392 non fishing vessels, 364 were ten metres and under vessels.

The ten metre and under fleet mostly fish using creels (sometimes called pots), which are traps in the form of cages or baskets, typically baited and used to catch shellfish. Creels catch some shellfish species such as crabs, lobsters and Nephrops, but other species like scallops are predominantly caught through dredging. Nephrops is also caught through trawling. In 2021, 56 per cent of the 1,573 ten metre and under vessels were fishing mainly using creels.

Of the 509 over ten metre vessels, 71 per cent (362 vessels) mainly targeted shellfish, whilst 99 vessels (19 per cent) mainly targeted demersal species. Only 20 vessels mainly targeted pelagic species, with all 20 being trawlers. Creel fishing vessels and Nephrops trawlers form the majority of the over ten metre shellfish group, whilst trawlers dominate the demersal group (Table 41). Compared to 2012, the ten metre and under fleet has increased by 137 vessels (10 per cent) while the over ten metre fleet has decreased by 89 vessels (15 per cent).

Chart 8. Engine power (kilowatts) of Scottish vessels by length category, 2021



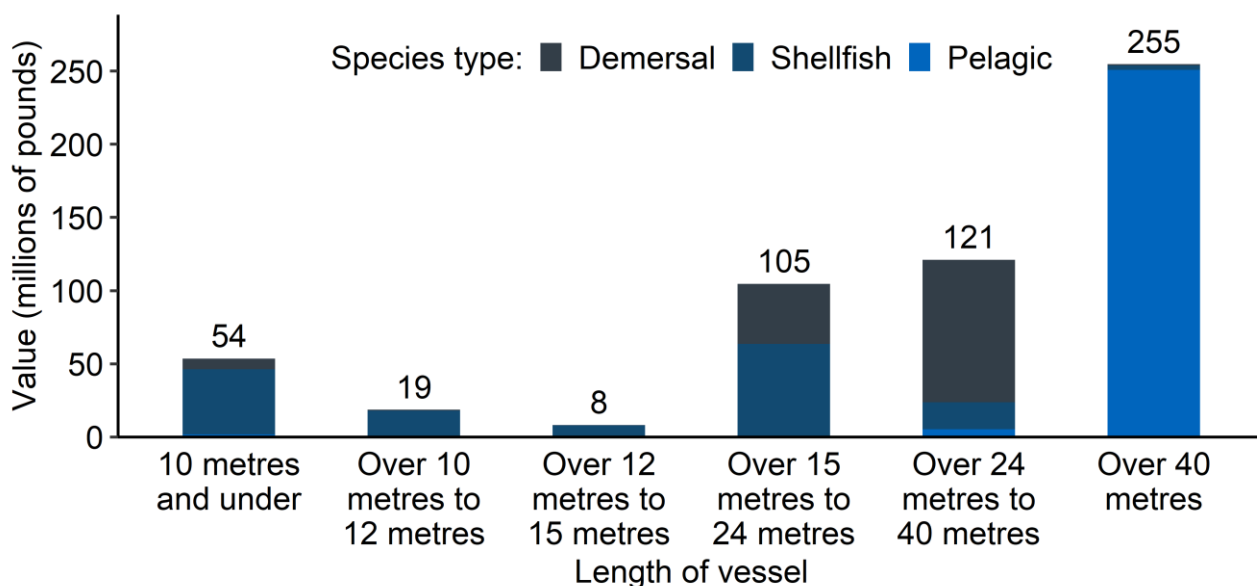
Data source: Table 39c.

The total engine power of the Scottish fleet has remained broadly consistent at 369 thousand kW. The two vessel length categories with the largest total engine power in 2021 were the 10 metres and under vessels and the over 40 metre vessels. The average power for the over 10 metre fleet as a whole was 548 kW per vessel compared to 57 kW per vessel for the 10 metres and under vessels.

4.2 The performance of the Scottish fishing fleet

In 2021, Scottish fishing vessels landed 437 thousand tonnes of sea fish and shellfish with a gross value of £560 million. Chart 9 shows the total value achieved by each length category as well as the split between demersal, pelagic and shellfish species landed.

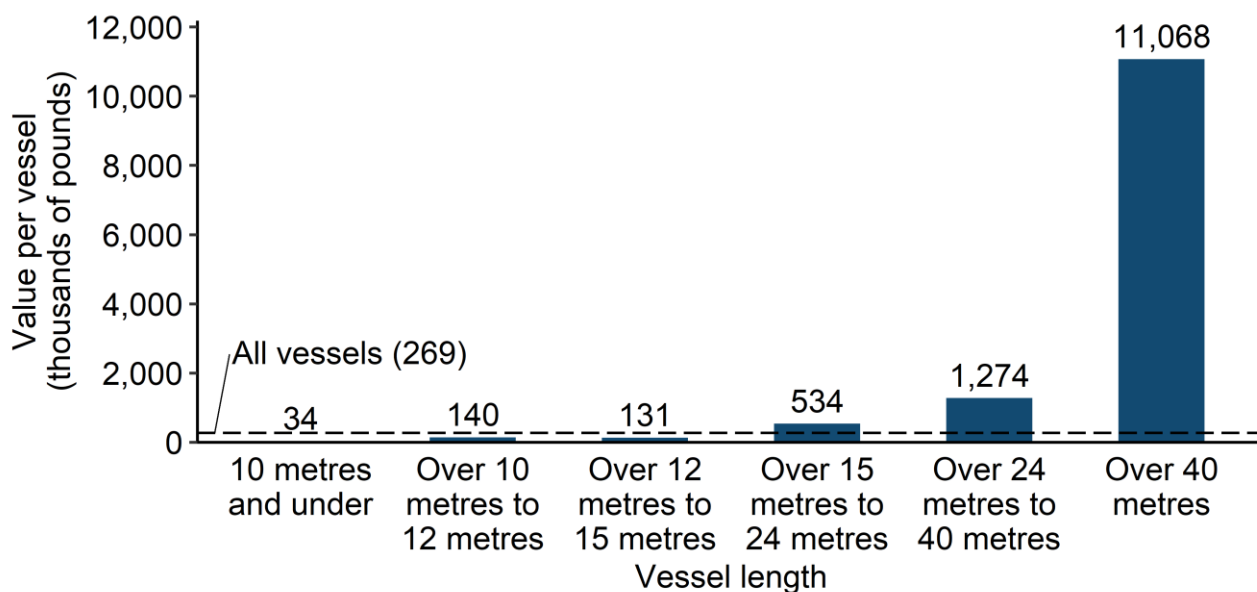
Chart 9. Value of fish and shellfish landed by Scottish vessels by length category, 2021



Data source: Table 29.

The majority of the value of fish is landed by over 40 metre Scottish vessels. These are the large pelagic vessels which land the majority of the mackerel, Scotland’s most valuable species. These vessels landed in total £255 million in 2021 with 98 per cent being pelagic species. The over 15 metre to 40 metre vessels catch a mix of different species whilst the 10 metre and under vessels mostly land shellfish. In 2021, the 10 metre and under Scottish vessels landed £54 million worth of fish and shellfish with 83 per cent being shellfish.

Chart 10. Average value landed per Scottish vessel (in thousands of pounds) by length category, 2021



Data source: Tables 29 and 38a.

As can be seen in Chart 10, the over 40 metre Scottish vessels landed had the highest value of fish and shellfish landed per vessel, landing an average of £11 million per vessel

in 2021. This is well above the average of all vessels which was £269 thousand per vessel.

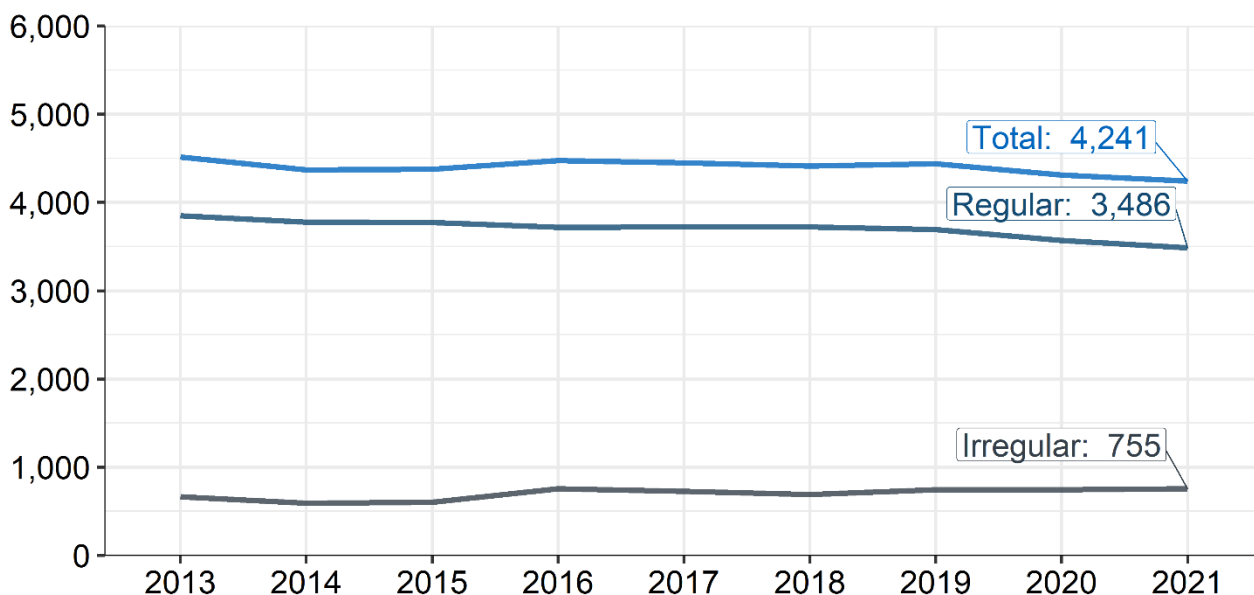
The 10 metres and under vessels landed below average, landing an average of just £34 thousand per vessel despite being the 4th most valuable length category. This is due to the fleet being made up of a large number of vessels which are restricted in the amount they can catch due to their size.

5 Employment

In 2021, 4,241 fishers were working on Scottish vessels, representing 0.2 per cent of the total Scottish labour force¹². The number of fishers working on Scottish vessels fell by two per cent (down 70 fishers) between 2020 and 2021 (Table 44 and Chart 11).

Although employment in the fishing fleet is a small percentage of total employment in Scotland, employment in fishing accounts for a higher percentage of employment in island communities (Shetland four per cent, Orkney three per cent, Na h-Eileanan Siar two per cent) and in Argyll and Bute (one per cent) (Table 46).

Chart 11. Number of fishers working on Scottish vessels, 2013 to 2021



Data source: Table 44.

Since 2013, employment on Scottish-based fishing vessels has fallen by six per cent. There has been a nine per cent decrease in regular employment whilst irregular employment has increased by 14 per cent since 2013.

Fraserburgh is the district with the largest number of fishers (791) accounting for 19 per cent of the total in 2021. It is also the district with the largest number of fishers who work regularly, with 680 regularly employed fishers. Shetland had the most irregular fishers (215), accounting for 28 per cent of the total fishers in this category.

¹² Figures for the Scottish labour force come from the Annual Population Survey 2021 by ONS.

Supplementary Tables

The following supplementary tables are available alongside this publication in Excel format. These can be downloaded here: <https://www.gov.scot/publications/scottish-sea-fisheries-statistics-2021/documents/>

- Table 1: Change in total tonnage and value in real terms of landings by Scottish vessels between 2020 and 2021.
- Table 2: Change in price per tonne in real terms of selected species landed by Scottish vessels between 2020 and 2021.
- Table 3: Landings by Scottish vessels in real terms by species type 2012 to 2021.

- Table 4: Tonnage and value of landings by Scottish vessels into Scotland by main species 2017 to 2021.
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Technical Manual

Information about the data and methodology used to produce the Scottish sea fisheries statistics publication is provided in a stand-alone technical manual. This also includes a glossary of terms. The technical manual can be found here: [Scottish sea fisheries statistics: technical manual - gov.scot \(www.gov.scot\)](https://www.gov.scot/statistics/technical-manual)

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The data collected for this publication:

are available in through <https://www.gov.scot/publications/scottish-sea-fisheries-statistics-2021/documents/>

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