



The fishing industry in Scotland has been hit badly since the early 1990s. This has mainly been due to quota restrictions, which have particularly affected catches of demersal (white fish) species including haddock and cod. As a result of this, employment in the sector has been steadily falling over the past 10 years.

However, from 2005 the North East ports of Aberdeen, Fraserburgh and Peterhead continued to show signs of stabilising and employment levels in the sector levelled off. This trend has continued in 2008.

Data in this bulletin is taken from the Scottish Government's most recent 'Scottish Sea Fisheries Statistics 2008' published in Autumn 2009. Figures relate to landings by UK vessels into Scottish ports in mid 2008. Previous Aberdeenshire Council fisheries bulletins have included the port of Buckie. However, the North East region now corresponds only to the ports of Aberdeen, Fraserburgh and Peterhead so direct comparisons with previous reports should not be made.

## Employment in the Catching Sector

### North East Scotland, Scotland and UK

Figure 1 - Employment in the Catching Sector, 1998-2008

Year	North East Scotland	Scotland	UK	North East as % of Scotland	North East as % of UK
1998	2,567	7,771	17,889	33.0%	14.3%
1999	2,377	7,330	16,896	32.4%	14.1%
2000	2,075	6,902	15,649	30.1%	13.2%
2001	2,016	6,637	14,958	30.4%	13.5%
2002	1,739	5,707	14,205	30.5%	12.2%
2003	1,375	5,276	13,122	26.1%	10.5%
2004	1,299	5,275	13,453	24.6%	9.7%
2005	1,384	5,155	12,831	26.8%	10.8%
2006	1,382	5,205	12,934	26.6%	10.7%
2007	1,472	5,424	12,729	27.1%	11.6%
2008	1,557	5,448	12,761	28.6%	12.2%

Sources: Scottish Government and DEFRA (see Note 1 overleaf)

Figure 1 shows the overall decrease in catching sector employment since 1998 in North East Scotland, Scotland and the UK, but within that, in recent years the downward trend reversed and in 2008 the total number of fishermen rose by 5.8% in North East Scotland and 0.4% in Scotland.

Over the long term, between 1998 and 2008 there has been an employment loss of over 1000 fishermen in North East Scotland, down from 2,567 to 1,557 fishermen.

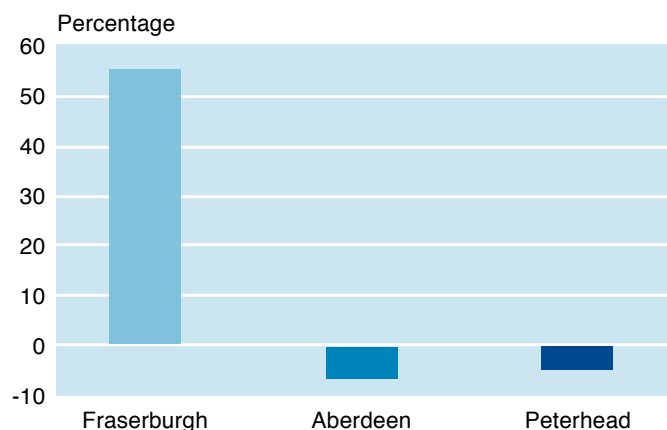
This represents a 39.3% fall. In Scotland the reduction has been smaller at -29.1% over the same timescale. In the UK there was a 28.7% decline in employment between 1998 and 2008, to a total of 12,761. This reflects the relatively higher impact of decommissioning schemes on the North East fleet.

In 2008, the North East landing ports of Aberdeen, Fraserburgh and Peterhead accounted for 27.1% of the total fishermen employed in Scotland and 11.6% of the total fishermen employed in the UK, emphasising the area's importance to the UK fishing industry.

### Employment by Fishing District

The Aberdeenshire fishing districts of Peterhead (including Peterhead, Port Errol and Boddam) and Fraserburgh (including Fraserburgh, Gardenstown, Macduff, Pennan, Portsoy, Rosehearty, Sandhaven and Whitehills) account for the majority of fishing employment in the North East, with Fraserburgh employing 901 fishermen in 2008 (see Figure 2).

Figure 2 - Employment by Fishing District, 2008



Source: Scottish Government and DEFRA (see Note 1 overleaf)

Over 2007 and 2008, the number of fishermen employed in Fraserburgh increased by 6.5%, while the Aberdeen and Peterhead figures show a small decrease in the total number of fishermen. Overall, the North East ports saw an increase in fishermen of 3.1%. However, this doesn't reflect the longer term trend.

Over the period 1998 to 2008 employment levels in the fishing districts of North East Scotland have fluctuated, but have generally increased. Worst hit over the 10 year period has been Aberdeen with a drop of 49.3% (from 201 in 1998 to 102 in 2008). Fraserburgh also experienced a drop (40.1%) while Peterhead (including Peterhead, Boddam and Port Errol) saw a drop of 28.3%. The Aberdeen figures were inflated in 1998 by the inclusion of Arbroath fishermen, but have since declined.

## Fishing Fleet Changes

### Total Vessels

In 2008, 425 vessels were registered in North East Scotland, representing 19.2% and 6.1% respectively of the Scottish and UK fishing fleets (see Figure 3). Since 1998 the North East fleet, in terms of vessel numbers, has contracted by 20.4% (109 vessels). This compares to a 16.2% decline in Scotland and 14% in the UK overall, again reflecting the impact of decommissioning in the North East.

Between 2007 and 2008, the total number of vessels in the North East fell by 15%. This is the largest annual increase since the overall decline in 2003/2004. An increase in vessel numbers over the period 2007 to 2008 was recorded in the Scottish fleet (+24), but across the UK there was an overall decrease in the number of vessels from 6,793 to 6,573 (-220).

Structurally, demersal vessels account for 40% of the North East fleet, while shellfish boats make up 56% of the fleet, up from 50% in 2008. The larger, pelagic fishing vessels still account for a smaller proportion of vessels (3.8%).

Figure 3 - Total Number of Vessels, 1998-2008

Year	North East Scotland	Scotland	UK	North East as % of Scotland	North East as % of UK
1998	534	2,631	7,639	20.3%	7.0%
1999	496	2,563	7,448	19.4%	6.7%
2000	506	2,542	7,242	19.9%	7.0%
2001	518	2,548	7,169	20.3%	7.2%
2002	459	2,443	7,033	18.8%	6.5%
2003	410	2,337	6,735	17.5%	6.1%
2004	407	2,325	6,642	17.5%	6.1%
2005	408	2,286	6,342	17.8%	6.4%
2006	413	2,224	6,372	18.6%	6.5%
2007	410	2,191	6,793	18.7%	6.1%
2008	425	2,205	6,573	19.3%	6.5%

Sources: Scottish Government and DEFRA (see Note 2 below)

### Vessels Over 10 Metres

Larger vessels, which are traditionally associated with demersal and pelagic catches, are relatively more important in North East Scotland than in other areas. 46.4% of vessels in 2008 (197) in the North East were over 10 metres in length, compared to 32.3% in Scotland and 27.8% in the UK.

Vessels in this category have also declined since 1998, and the North East of Scotland has sustained losses of 144 vessels (42.2%) compared to 656 vessels (30.5%) in the UK overall.

The relative share of total vessels in the over 10 metre category in the North East has fallen between 1998 (64.0%) and 2008 (46.4%). The North East of Scotland's dominance, however, is illustrated by its share of the Scottish and UK fleet. By 2008, 27.6% of Scotland's and 13.1% of the UK's vessels over 10 metres were based in the North East (Figure 4).

Figure 4 - Total Number of Vessels Over 10m, 1998-2008

Year	North East Scotland	Scotland	UK	North East as % of Scotland	North East as % of UK
1998	341	1,026	2,152	33.2%	15.8%
1999	317	979	2,039	32.4%	15.5%
2000	312	949	1,969	32.9%	15.8%
2001	315	944	1,942	33.4%	16.2%
2002	256	828	1,746	30.9%	14.7%
2003	210	749	1,622	28.0%	12.9%
2004	206	730	1,550	28.2%	13.3%
2005	207	719	1,508	28.8%	13.7%
2006	200	706	1,476	28.3%	13.6%
2007	193	697	1,628	27.7%	11.9%
2008	197	713	1,496	27.6%	13.1%

Sources: Scottish Government and DEFRA (see Note 2 below)

### Vessels by Fishing District

Fraserburgh fishing district is the registered base to 53.1% of the North East fleet with a total of 226 vessels, Peterhead accounts for 25.2% and Aberdeen represents 21.6%.

Over the ten year period 1998 to 2008, North East fishing districts have experienced declining numbers of total vessels.

The largest reduction has been in Peterhead where there has been a fall in total vessels of 86.2%. The Aberdeen figures are not comparable due to the inclusion of the Arbroath fleet since 1998.

Vessels over 10 metres in length have declined at varying rates across the North East. In Fraserburgh over the past decade there has been a loss of 66 vessels (36%) in this category while Peterhead has experienced a 47.2% decline (58 vessels) in terms of larger boats.

**Note 1:** Peterhead's employment figures for 2005 were under-recorded, but are estimated to be the same as for 2006.

**Note 2:** 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 as active. An exercise was conducted to take this information on board, 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.

The publishers assume no responsibility for errors, omissions or inaccuracies of source statistics.