



The most recent data on the fishing industry for 2008 shows the total volumes of fish landed in the three North East ports of Aberdeen, Fraserburgh and Peterhead have decreased in the last year, by 5.2%.

The total volume of demersal (white fish species such as haddock and cod) and shellfish stocks have dropped by a significant 12.4% from 91,315 to 79,978 tonnes. Overall the total value of fish landed in the North East has remained similar to the previous year (increased by 0.6%).

The volume of demersal fish landed into the North East has decreased, while landings of the relatively more expensive pelagic and shellfish stocks have risen. Overall, the total volume and price per tonne of fish have remained similar to the previous year.

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, Peterhead and Fraserburgh so direct comparisons with previous bulletins should not be made.

Volume (Weight) of Landings

Total Landings

In 2008, over 149,000 tonnes of fish were landed into ports in the North East of Scotland. This represents over half of all landings into Scotland and 36% 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 12,000 tonnes of shellfish in 2008, 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.

Figures published by the Scottish Government for 2008 show an overall decrease of 5.2% in the volume of fish landed in the North East since 2007 (see Figure 1). This also reflects a longer term trend in the volume of fish landed into the North East ports; since 1996 landings have declined at both Aberdeen and Fraserburgh but risen slightly at Peterhead.

Changes in the total volume of fish landed are closely related to the types of fish that each port lands. Demersal landings fell by 54.4% between 1996 and 2008, however between 2007 and 2008 there was a 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 by 45.4% between 1996 and 2008. This has been reflected in increased landings at Peterhead, where pelagic landings make up 62.3% of all landings into the fishing district.

The year on year comparison between 2007 and 2008 shows a fall of 12.4% in pelagic landings in the North East. Landings of shellfish (such as lobster, prawns and scallops) rose over the period 1996 to 2008 by 94.5% and by 5.6% between 2007 and 2008.

Figure 1 - Volume (Tonnes, Live Weight) of Total Fish Landings by UK Vessels, 1996-2008

Landing District	2008	2007	1996	Change '07-'08	Change '96-'08
Aberdeen	7,598	11,318	31,394	-32.9%	-75.8%
Peterhead	113,397	117,408	105,717	-3.5%	7.3%
Fraserburgh	28,251	28,557	39,389	-2.5%	-28.3%
NE Scotland	149,246	157,501	176,500	-5.2%	-15.4%
Scotland	283,111	311,078	373,502	-9.0%	-24.2%
UK	408,200	439,800	635,900	-7.2%	-35.8%
NE as % of Scotland	52.7%	45.2%	47.3%		
NE as % of UK	36.7%	35.8%	27.8%		

Source: Scottish Government

Tonnage by Landing District

Aberdeen (includes all recorded landings at Aberdeen, Arbroath, Catterline, Gourdon, Johnshaven, Montrose and Stonehaven) landed over 7,500 tonnes of fish in 2008, this is down by 32.9% on the previous year.

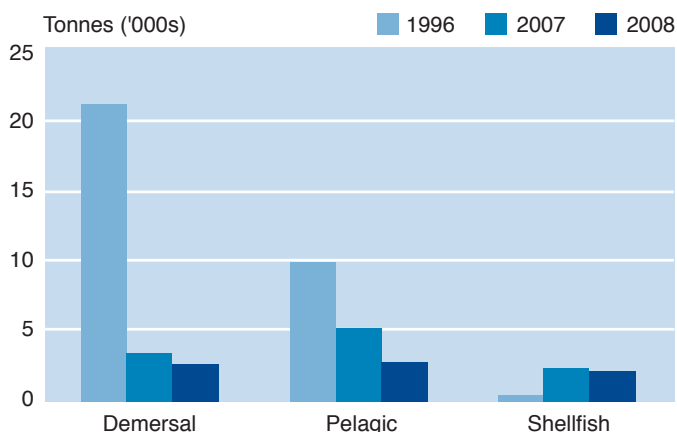
In terms of volume of fish caught, Aberdeen landed similar numbers of demersal, pelagic and shellfish catches.

Peterhead (includes Peterhead, Boddam and Port Errol) continues to be the top UK pelagic port landing 29% of the UK's total pelagic catch. Peterhead is also still the largest white fish port in Scotland and the UK with 22.8% and 44.4% of the respective total demersal catches.

Over 2008, total landings decreased in Peterhead by 3.5%, largely as a result of quota cuts to the pelagic species.

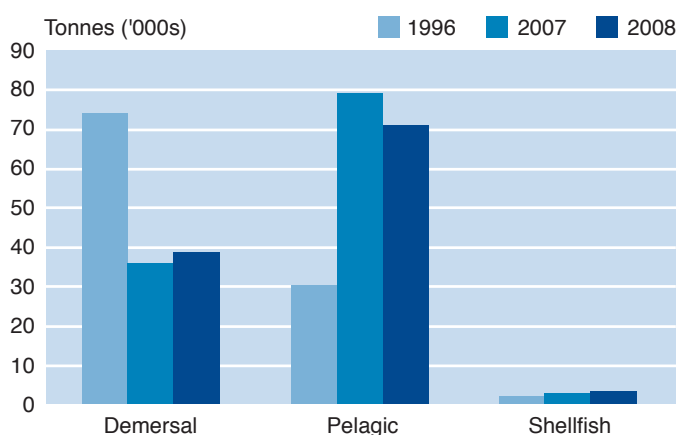
Fraserburgh (includes Fraserburgh, Gardenstown, Macduff, Pennan, Portsoy, Rosehearty, Sandhaven and Whitehills) is the largest shellfish port in the UK and lands 19.6% of Scotland's total shellfish. In 2008, total landings at Fraserburgh were up on the previous year, primarily as a result of the increase in the shellfish landing 8.9%.

Figure 2 - Volume (Tonnes, Live Weight) of Landings at Aberdeen, 1996-2008



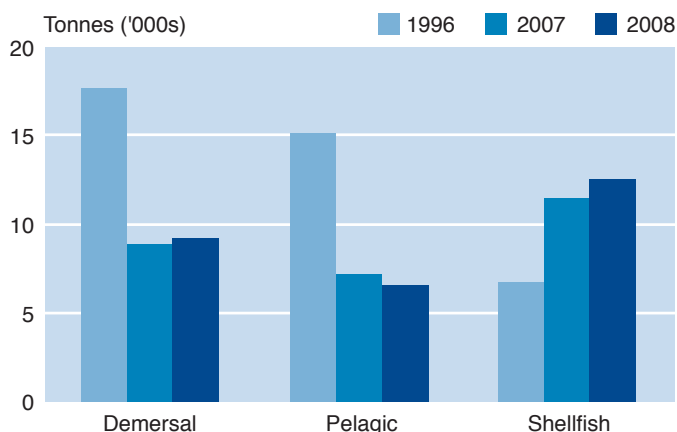
Source: Scottish Government

Figure 3 - Volume (Tonnes, Live Weight) of Landings at Peterhead, 1996-2008



Source: Scottish Government

Figure 4 - Volume (Tonnes, Live Weight) of Landings at Fraserburgh, 1996-2008



Source: Scottish Government

Value of Landings

Total Landings

Since 1996, the real value (inflation adjusted) changes in North East fish landings are shown in Figure 5. There has been a 7% fall in real price from the 1996 figure. This, however, is less of a decrease than the comparative figure for both Scotland and the UK. By district, Aberdeen has suffered a large decline in value reflecting reduced fish tonnage whilst Peterhead has suffered a slight decline (-2.2%). Value per tonne has risen in the North East port of Fraserburgh generally over the period since 1996.

In 2008, 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 6% 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, 1996-2008 (£'000, Real Prices)

Landing District	2008	2007	1996	Change '07-'08	Change '96-'08
Aberdeen	9,177	11,956	29,340	-23.2%	-68.7%
Peterhead	100,419	94,083	102,639	6.8%	-2.2%
Fraserburgh	52,093	54,683	41,916	-4.7%	24.3%
NE Scotland	161,689	160,722	173,895	0.6%	-7.0%
Scotland	350,720	348,252	409,514	0.7%	-14.4%
UK	526,000	535,600	662,580	-1.8%	-20.6%
NE as % of Scotland	46.1%	46.2%	42.5%		
NE as % of UK	30.7%	30.0%	26.2%		

Source: Scottish Government

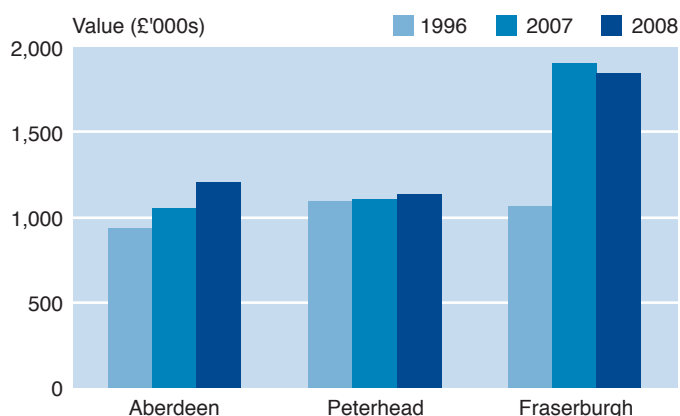
By main species, white fish values in North East Scotland have fallen by 54% in real terms since 1996. By contrast North East pelagic values increased by 45% compared with the Scotland increase of 19.9% and the UK, 18.2%.

Shellfish values in the North East have increased markedly by over 94% since 1996, while the Scottish and UK value has risen by 22.8% and 9.2% respectively. On the whole; there was a 0.6% increase in value in the North East ports in 2008, from £160,722 in 2007 to the £161,689 in 2008.

Converting the volume and value statistics to real value per tonne analysis reveals that between 1996 and 2008 the North East price per tonne for all fish species rose by 36% from £3,083 to £4,190.

Figure 6 (overleaf) shows that across the North East fishing districts, values per tonne have increased at all ports since 1996.

Figure 6 - Real Value per Tonne of Total Fish Landings by UK Vessels, 1996-2008



Source: Scottish Government

Both Aberdeen and Peterhead have witnessed an increase in value per tonne, 29.2% and 4.9% respectively. In Fraserburgh prices per tonne rose by a marked 73.2% over the period, as a result of the higher proportion of shellfish landed.

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.

2008 was a good year as value per tonne figures rose in the North East Ports of Aberdeen and Peterhead. Fraserburgh witnessed a minor decline (-3.0%). Peterhead remained the top port in the UK for whitefish and pelagic species and recorded record levels of fish landings in 2008.

Volume and Value of Fish Landings 2008 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	240	479	4,025	8,597	559	1,011	4,824	10,897
Haddock	1,477	1,669	16,926	19,201	2,947	2,008	21,350	22,878
Monkfish	63	173	1,998	5,423	1,684	4,967	3,745	10,563
Saithe	263	145	7,201	4,299	597	316	8,061	4,760
Whiting	220	206	4,335	4,608	1,788	1,311	6,343	6,125
TOTAL DEMERSAL	2,571	3,234	39,348	50,850	9,194	12,105	51,113	66,189
Herring	0	0	17,440	4,463	2,162	625	19,602	5,088
Mackerel	0	0	46,086	34,209	4,209	2,409	50,295	36,618
TOTAL PELAGIC	2,773	256	70,635	39,338	6,570	3,097	79,978	42,691
Norway Lobster (Nephrops)	219	690	2,801	8,819	11,197	30,015	14,217	39,524
TOTAL SHELLFISH	2,254	5,687	3,414	10,231	12,487	36,891	18,155	52,809
TOTAL ALL SPECIES	7,598	9,177	113,397	100,419	28,251	52,093	149,246	161,689

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.

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