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2009 Economic Survey of the UK Fishing Fleet


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2009 Economic Survey of the UK Fishing Fleet

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Contents

Using figures in this report

When reading the figures in the fleet segment chapters of this report, you may find it useful to understand more about where the figures originated and how they are calculated.

The following information is true for all segment chapters.

Fishing income figures are available to us based on the declared landings of every vessel in the UK fleet. This data comes from the MMO. In each segment report, the total income for the segment presented in Table 1 is the sum of the declared fishing income of every vessel in that segment for calendar year 2009. The average fishing income per vessel is simply the sum of fishing income divided by the number of vessels in the segment. You can check this using the figures in Table 1.

Days at sea figures and vessel characteristics figures are also based on official government data supplied to us by the MMO for every vessel in the UK fleet.

In Tables 2 and 3, we show some average ratio figures, such as average income per day at sea or average fuel use per day at sea. These figures are the average of all vessels' ratios. So, we find the income per day at sea for each vessel in the segment, then total those figures and divide by the number of vessels to find the average of income per day at sea. This figure is not the same as the segment total income divided by the segment total days at sea. For this reason, if you try to multiply figures from Tables 2 or 3 to match with segment total or average figures in Table 1, you will find that they do not match.

If you want to estimate segment total ratios, you can calculate them from the figures in Table 1.

Crew numbers are based on our interviews with skippers and vessel owners.

In Table 4, the fishing income figures are also based on the declared landings figures of every vessel in the segment. The costs profile is based on the sample of vessel accounts that vessel owners contributed during our survey and what we know about the other vessels in the segment for which we did not receive vessel accounts. Fuel cost is estimated for every vessel in the segment based on the vessel's days at sea per year, engine size and the average price of fuel for the calendar year 2009.

Introduction

The *2009 Economic Survey of the UK Fishing Fleet* provides a detailed insight into the financial and operational performance of the UK fishing fleet during 2009. This is the fifth edition of this annual report and it reflects an updated fleet segmentation.

The information presented in this publication is a comprehensive and accurate reflection of the financial performance of the UK fishing fleet and is used by a wide range of people across industry, government and academia. We hope that availability of accurate economic data and expert analysis of fleet performance will be used to enhance fisheries management and benefit the UK fleet and seafood processors in the long-run. Production of this report is only possible with the goodwill of all vessel owners (and their accountants) who participated in the survey.

Each year we try to improve the quality and usefulness of the economic data on the UK fleet. The 2009 report has a slightly altered segmentation which makes it easier to tell which segment any individual vessel should be allocated to and, makes it easier for us accurately to allocate vessels to segments based on the official data we receive from the MMO. Appendix 3 at the back of the report shows criteria for including vessels in the various fleet segments. We have continued with the useful low activity and miscellaneous vessels segments.

We recommend that readers refer to the Methods section of this report as it is important in interpreting some of the information presented in the segment chapters.

The data set for this report is also used to produce individual vessel business benchmark reports for vessel owners who requested them.

Seafish fleet profit forecasts and fleet economic impact assessments of management measures also rely on the data set which is the foundation of all the economic analysis produced by Seafish Economics.

If you have any comments on this report, would like to suggest improvements to be made in future reports or would like more detailed information, please contact:

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Section 1: UK fleet analysis

Fleet Segmentation

There is a very wide range of vessel types, gear types and activity levels in the UK fishing fleet. Vessels range from large pelagic vessels, earning (and costing) £millions, to low-activity under 10m boats, with annual earnings of less than £10,000.

Seafish has developed a fleet segmentation which groups together vessels of comparable characteristics so that it is easier to make sense of the fleet overall. Each segment of vessels has criteria that define which vessels are included. The criteria are based on the physical characteristics of vessels, activity level, the gear used, species targeted and areas fished. By grouping vessels this way we can provide useful information on the operational and financial performance of groups of comparable vessels.

For 2009 we again defined 33 Seafish segments to categorise the UK fleet although there are some changes to segment definitions, such as changes in length categories for Area VII trawlers. The segments are shown in Table 1. Some segments have many vessels, such as the under 10m pots and traps segment which in 2009 had 991 vessels while others have very few, such as the Area VIIb-k 24-40m trawlers, with just 13 vessels. Segments contain at least nine vessels so that reliable data can be collected, robust estimates of costs and profits can be produced, and confidentiality can be assured.

For the 2009 fleet report we again have two 'low activity' segments for under 10m and 10m and over vessels. Vessels are allocated into these two segments if they had fishing income below £10,000 for 2009 and / or spent less than 20% of the average days at sea of the segment that they would otherwise be allocated to. Vessels of any type can be included in these two groups. The removal of these vessels from other segments prevents the average income being skewed by vessels which are not fully commercially active during the year in question.

Individual vessels may change from one segment to another depending on their activity and gear use in any given year.

Fishing Income

In 2009, the total income of UK vessels from recorded fish landings at home and abroad was £673million, a 6% increase compared to 2008 (Figure 1). Fishing income figures presented in this report are based on official landings data collected by the Marine Management Organisation (MMO), and refer to the fishing activity of every active vessel registered in the UK fleet in 2009. Fishing income not included in these figures would include landings of small amounts of seafood for personal consumption by under 10m vessels.

Average fishing income per vessel in each Seafish segment is shown in Table 1. Average fishing income per vessel for 2009 varied significantly across different segments, ranging from £30,877 for vessels Under 10m using hooks to £6.3million for pelagic vessels 40m and over.

Segment	No. of Vessels	Average Fishing Income £	Average Days at Sea
Area VII scallop dredge	54	434,402	177
Area VIIa demersal trawl	9	63,519	78
Area VIIa nephrops >250kW	36	183,512	173
Area VIIa nephrops <250kW	63	89,226	131
Area VIIb-k trawlers 10-24m	58	156,049	174
Area VIIb-k trawlers 24-40m	13	1,026,974	268
Gill netters	41	339,879	149
Longliners	29	529,818	189
Low activity 10m and over	69	3,995	19
Low activity <10m	1,829	3,144	25
Miscellaneous	54	771,016	150
N.Sea beam trawl >300kW	9	1,174,906	230
N.Sea beam trawl <300kW	27	61,294	104
N.Sea nephrops >300kW	83	439,389	195
N.Sea nephrops <300kW	84	178,039	149
NSWoS demersal >24m	46	1,267,702	230
NSWoS demersal pairs	41	657,719	186
NSWoS demersal seiners	23	605,447	160
NSWoS demersal <24m >300kW	47	610,429	190
NSWoS demersal <24m <300kW	34	171,661	128
NSWoS scallop dredge	62	265,767	160
Pelagic 40m and over	28	6,272,673	57
Pots and traps 10-12m	177	93,707	167
Pots and traps 12m and over	83	248,017	179
S.West beam trawl <250kW	21	366,066	219
S.West beam trawl >250kW	12	602,189	225
<10m demersal trawl/seine	216	57,275	100
<10m drift / fixed nets	238	42,330	94
<10m mobile other	94	51,658	71
<10m pots and traps	991	44,280	113
<10m using hooks	105	30,877	75
WoS nephrops >250kW	32	221,283	187
WoS nephrops <250kW	119	120,229	163
Total UK fleet (active vessels)	4,827		

Table 1: Fishing income and days at sea by Seafish segment (Source: MMO and Seafish)

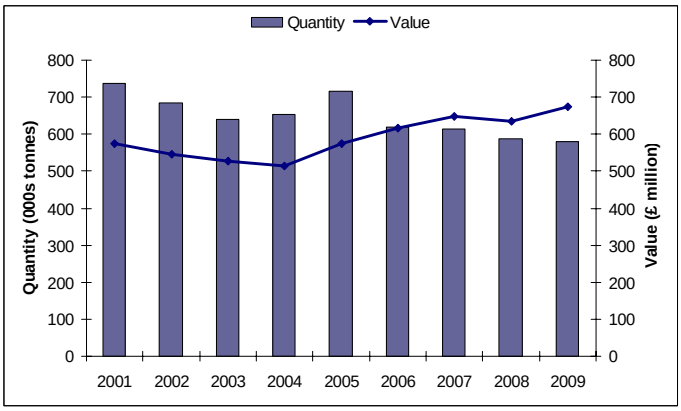

Figure1: Fish landings by UK vessels (Source: MMO)

Total quantity (or volume) of fish landings by UK vessels fell by around 1% in 2009 compared to 2008, however the total value of landings increased by about 6%, indicating an overall increase in average prices in 2009, see Figure 1.

Figure 2 shows that the 2009 average prices per tonne of demersal fish and shellfish remained stable since 2008. Average prices for pelagic species rose by 40% to £664 per tonne from 2008 to 2009, due largely to increases in average prices for herring and mackerel.

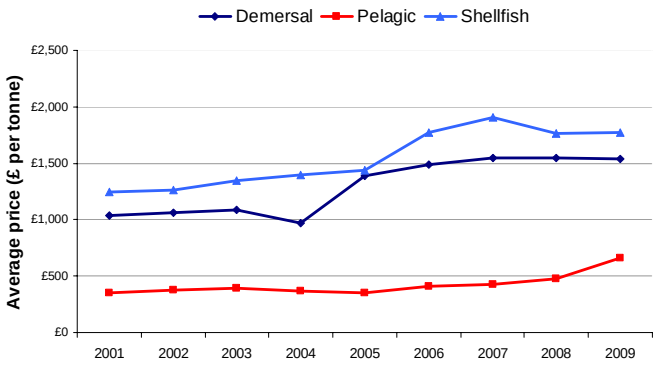

Figure 2: Average value of species groups (Source: MMO)

Fishing income is driven by the amount (volume) of fish that vessels catch per day and the price obtained for the fish landed. Table 2 shows the tonnes landed per day at sea, the average price per tonne landed for all species combined and the average fishing income per day at sea for each fleet segment. There is significant variation across segments in volume landed per day, price per tonne and fishing income per day. For example demersal vessels 24m and over landed 3.6 tonnes per day and had an average fishing income per day at sea of £5,287, while vessels under 10m using pots and traps landed 0.2 tonnes per day and had an average fishing income per day of £474. The small pots and traps vessels had a much higher price per tonne however.

Segment	Average per vessel		
	Landings per day (tonnes)	Price per tonne (£)	Income per day (£)
Area VII scallop dredge	1.47	1,508	2,078
Area VIIa demersal trawl	1.31	1,090	905
Area VIIa nephrops >250kW	0.71	1,502	1,048
Area VIIa nephrops <250kW	0.46	1,455	655
Area VIIb-k trawlers 10-24m	0.43	2,087	834
Area VIIb-k trawlers 24-40m	1.48	2,495	3,692
Gill netters	0.98	2,831	2,011
Longliners	1.13	2,780	2,484
N.Sea beam trawl >300kW	3.73	1,387	5,232
N.Sea beam trawl <300kW	0.72	1,673	667
N.Sea nephrops >300kW	1.20	1,813	2,168
N.Sea nephrops <300kW	0.61	1,856	1,077
NSWoS demersal >24m	3.63	1,556	5,287
NSWoS demersal pairs	3.00	1,173	3,447
NSWoS demersal seiners	3.16	1,212	3,619
NSWoS demersal <24m >300kW	1.78	1,772	3,027
NSWoS demersal <24m <300kW	0.76	2,346	1,174
NSWoS scallop dredge	0.88	1,847	1,535
Pelagic 40m and over	190	704	139,340
Pots and traps 10-12m	0.29	3,735	602
Pots and traps 12m and over	0.95	1,790	1,252
S.West beam trawl <250kW	0.59	2,799	1,634
S.West beam trawl >250kW	1.12	2,319	2,534
<10m demersal trawl/seine	0.27	2,466	569
<10m drift / fixed nets	0.23	3,070	477
<10m mobile other	0.69	2,741	1,038
<10m pots and traps	0.19	4,362	474
<10m using hooks	0.18	3,341	473
WoS nephrops >250kW	0.63	1,962	1,170
WoS nephrops <250kW	0.35	2,238	722

Table 2: Average vessel landings per day and average prices, by Seafish segment (Source: MMO and Seafish)

Operating Costs

Fishing vessels incur a range of operating costs which are often split into two groups: fishing costs and vessel costs. Fishing costs include fuel and oil, boxes, ice, food and stores, sales commission, harbour dues, subscriptions and levies, shore labour, travel costs, quota leasing, days at sea purchase and crew share (wages). Fishing costs vary depending on the amount of vessel activity and the value and volume of landings. Vessel costs comprise gear and vessel repairs, insurance, administration, and the purchase, hire and maintenance of electronic equipment. Many vessel costs are fixed, regardless of level of vessel activity during the year.

Average vessel operating costs for each segment are shown in Table 3. Seafish estimates show that average operating costs ranged from 59% of average income for vessels under 10m using hooks to 97% of average income for West of Scotland nephrops trawlers 250kW and over.

Operating costs were affected by reductions in activity in 2009. Activity levels of larger whitefish and nephrops vessels operating in the cod recovery zone were effectively restricted in 2009 due to limits imposed as part of the EU's cod recovery plan. In previous years, vessel owners who wanted to operate their vessels for more than the allocated days at sea could purchase days from other vessel owners. In 2009 however, the overall supply of days at sea and the proportion that could be traded was more restrictive.

In Table 3 the column showing average per vessel operating costs as % of income, is the average operating cost per vessel divided by the average income per vessel, rather than the average of all vessels' ratios of operating costs as percent of income. This is also true for the segment chapters.

Segment	Average per vessel		
	Annual operating costs (£)	Operating costs as % of income	Fuel cost as % of income
Area VII scallop dredge	349,133	79%	13%
Area VIIa demersal trawl	53,571	77%	25%
Area VIIa nephrops >250kW	151,906	83%	24%
Area VIIa nephrops <250kW	74,200	78%	16%
Area VIIb-k trawlers 10-24m	127,210	76%	16%
Gill netters	269,616	79%	7%
N.Sea beam trawl <300kW	60,229	95%	57%
N.Sea nephrops >300kW	403,543	84%	22%
N.Sea nephrops <300kW	171,142	88%	22%
NSWoS demersal >24m	1,188,546	92%	25%
NSWoS demersal pairs	631,155	92%	14%
NSWoS demersal seiners	566,256	85%	11%
NSWoS demersal <24m >300kW	559,663	88%	20%
NSWoS demersal <24m <300kW	158,140	90%	16%
NSWoS scallop dredge	219,102	79%	16%
Pots and traps 10-12m	60,819	64%	9%
Pots and traps 12m and over	222,009	77%	14%
S.West beam trawl <250kW	301,979	82%	22%
S.West beam trawl >250kW	532,114	88%	29%
<10m demersal trawl/seine	40,806	68%	12%
<10m drift / fixed nets	28,179	67%	9%
<10m pots and traps	28,566	61%	12%
<10m using hooks	20,010	59%	6%
WoS nephrops >250kW	219,953	97%	22%
WoS nephrops <250kW	99,134	77%	17%

Table 3: Average vessel costs by Seafish segment (Source: Seafish)

Fuel

In 2009, there was a welcome relief from the spike in oil prices that had a major impact on the UK fishing fleet in 2008. However, prices climbed throughout the year from a low at the start of the year. There was also a new trend of quayside prices being higher in relation to international oil prices than they had been previously (see Figure 3.)

As shown in Table 3, the amount of fuel consumed varies significantly between segments, with total annual spend on fuel ranged from 6% of income for under 10m vessels using hooks to 57% of income for North Sea beam trawlers under 300kW. For most segments the cost of fuel continued to represent a significant percentage of earnings and was in most cases the largest or second largest element of costs.

Table 4 shows the average vessel fuel consumption per segment. The average fuel consumption in litres per day at sea ranged from 82 litres for Under 10m vessels using hooks to 2,200 litres per day for the South West beam trawlers 250kW and over.

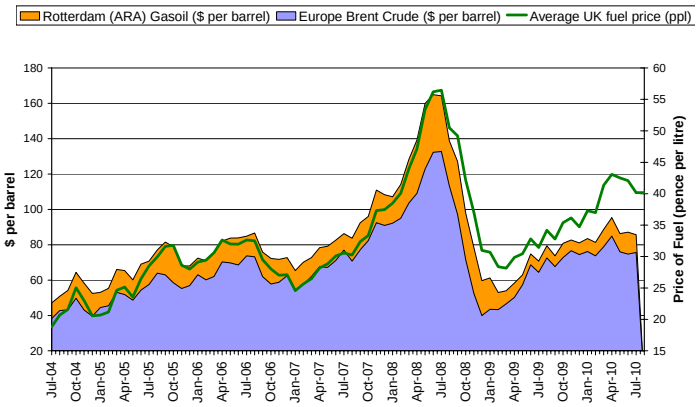

Figure 3: Oil price and marine fuel price (Source: Seafish)

Segment	Average per vessel		
	Annual fuel Cost (£)	Fuel cost per day (£)	Litres per day
Area VII scallop dredge	58,568	295	833
Area VIIa demersal trawl	17,484	226	639
Area VIIa nephrops >250kW	44,541	258	729
Area VIIa nephrops <250kW	14,949	112	316
Area VIIb-k trawlers 10-24m	27,247	153	433
Area VIIb-k trawlers 24-40m	244,678	911	2,577
Gill netters	23,410	141	400
Longliners	93,040	457	1,293
N.Sea beam trawl >300kW	447,174	1,951	5,517
N.Sea beam trawl <300kW	36,224	347	981
N.Sea nephrops >300kW	105,311	536	1,514
N.Sea nephrops <300kW	42,293	257	727
NSWoS demersal >24m	326,555	1,397	3,951
NSWoS demersal pairs	93,992	501	1,417
NSWoS demersal seiners	76,393	464	1,311
NSWoS demersal <24m >300kW	129,849	676	1,913
NSWoS demersal <24m <300kW	28,529	214	604
NSWoS scallop dredge	44,373	258	728
Pots and traps 10-12m	8,172	48	136
Pots and traps 12m and over	39,577	215	607
S.West beam trawl <250kW	81,543	365	1,033
S.West beam trawl >250kW	174,967	778	2,200
<10m demersal trawl/seine	7,012	69	196
<10m drift / fixed nets	3,622	36	101
<10m pots and traps	5,528	48	135
<10m using hooks	2,084	29	82
WoS nephrops >250kW	51,013	272	769
WoS nephrops <250kW	22,565	135	382

Table 4: Fuel consumption and cost by Seafish segment (Source: Seafish)

Profit

Operating profit is calculated as total income less operating costs. Seafish estimated that the total operating profit of the UK fleet in 2009 was £178million, equivalent to 25% of total fleet earnings. This estimate includes estimates of operating profit for all segments, including those not shown in detail in this report. This is a higher figure than 2008 in part because of lower fuel costs and in part because of higher prices for some key species.

Seafish estimates that all but one of the 33 Seafish fleet segments made an operating profit in 2009. Average operating profit/loss as a percentage of earnings ranged from 41% for Under 10m vessels using hooks to 3% for the West of Scotland nephrops over 250kW segment.

Net profit is operating profit less other finance costs, depreciation and interest. Seafish estimates that total net profit of the UK fleet in 2009, was £76million, equivalent to 11% of income. Net profit/loss as a percentage of earnings ranged from 31% for Under 10m vessels using hooks to -22% for the North Sea beam trawl under 300kW segment.

Segment	Average per vessel		
	Operating profit (£)	Operating profit margin	Net profit margin
Area VII scallop dredge	95,271	21%	15%
Area VIIa demersal trawl	15,659	23%	15%
Area VIIa nephrops >250kW	31,605	17%	3%
Area VIIa nephrops <250kW	20,723	22%	11%
Area VIIb-k trawlers 10-24m	40,901	24%	19%
Gill netters	70,262	21%	16%
N.Sea beam trawl <300kW	2,857	5%	-22%
N.Sea nephrops >300kW	74,984	16%	5%
N.Sea nephrops <300kW	23,440	12%	1%
NSWoS demersal >24m	106,834	8%	-1%
NSWoS demersal pairs	57,839	8%	1%
NSWoS demersal seiners	99,756	15%	1%
NSWoS demersal <24m >300kW	74,544	12%	0%
NSWoS demersal <24m <300kW	17,671	10%	5%
NSWoS scallop dredge	58,997	21%	15%
Pots and traps 10-12m	34,225	36%	24%
Pots and traps 12m and over	68,049	23%	19%
S.West beam trawl <250kW	64,773	18%	13%
S.West beam trawl >250kW	70,075	12%	8%
<10m demersal trawl/seine	18,920	32%	16%
<10m drift / fixed nets	14,151	33%	25%
<10m pots and traps	18,297	39%	28%
<10m using hooks	14,191	41%	31%
WoS nephrops >250kW	7,336	3%	-5%
WoS nephrops <250kW	30,435	23%	14%

Table 5: Average profit and profit margin by Seafish segment (Source: Seafish)

2.1 Area VII scallop dredge

- The segment comprised 54 vessels with an average length of 19m
- In total the segment landed 16,453 tonnes of seafood worth £23.5million in 2009
- On average, these vessels landed 305 tonnes, worth £434,402
- Scallops was the key species for this segment
- On average vessels made an operating profit of £95,271 in 2009

2009	Segment Total	Average per vessel
Active Vessels	54	-
Length (m)	-	19
Power (kW)	18,486	349
Registered Tonnage (GT)	4,943	93
VCU	14,542	274
Landings (Tonnes)	16,453	305
Fishing Income (£)	23,457,724	434,402
Days at Sea	9,562	177
Vessel Age	-	25
Crew	217	4

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Area VII scallop dredge vessels are based at a number of ports along the west and south coasts of the UK including Brixham, Kirkcudbright and Exmouth. In 2009 more vessels were active in the segment and on average the additional vessels were smaller than the 2008 average size.

Vessels in this segment spent on average 177 days at sea in 2009 targeting mostly scallops and queen scallops. On average vessels had 4 crew members and the segment employed 217 fishermen in total.

Income

The segment landed 16,453 tonnes of seafood worth £23.5million in 2009. Therefore on average, active vessels landed 305 tonnes, worth £434,402.

Scallops was the most important species to this segment in terms of both value and volume. Queen scallops accounted for 5% of the volume of landings but just 1% of value. The segment's average price for scallops was just below the UK fleet average price for scallops, see Figure 3.

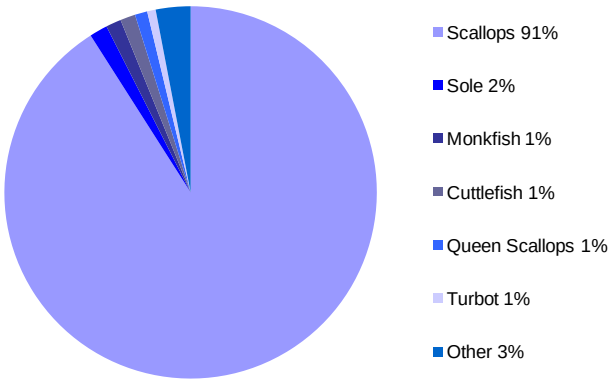

Figure 1. Value catch composition (Source: MMO, Seafish)

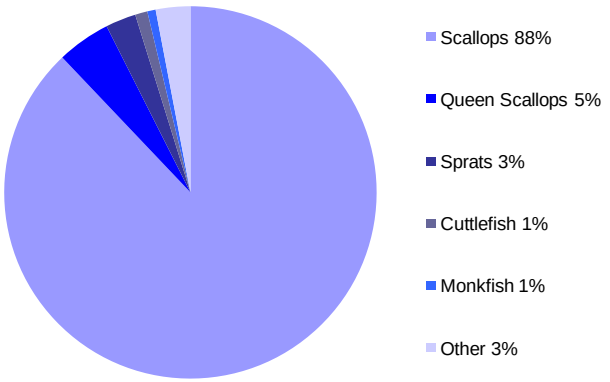

Figure 2. Volume catch composition (Source: MMO, Seafish)

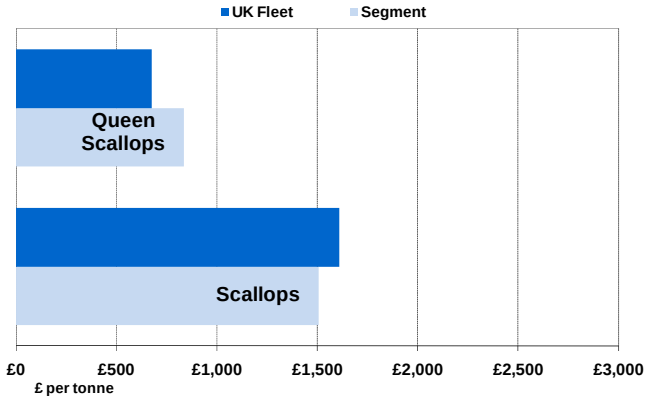

Figure 3. Average prices of key species (Source: MMO, Seafish)

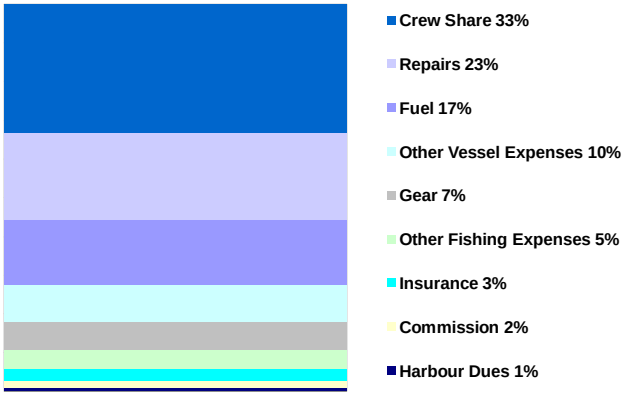

Figure 4. Operating costs breakdown (Source: Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 1.47 tonnes per day, obtained £1,508 per tonne and therefore earned £2,078 per day at sea. There was some variation between prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 2.07 compared to a segment average of 1.47 and 0.61 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	681,972	434,402	107,780
Tonnes / day	2.07	1.47	0.61
£ per tonne	1,768	1,508	1,417
£ per day	3,199	2,078	722
Days at Sea	185	177	139

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £349,133 or 79% of total income. There was variation between quartiles, with total operating costs for the most profitable quartile equating to 74% of income compared to 93% in the least profitable quartile. Crew share and repairs were the largest fishing costs, on average accounting for 33% and 23% of total operating costs respectively.

Fuel

On average, vessels consumed 833 litres per day at sea costing £295 per day. Fuel consumption per day ranged from an average of 600 litres for vessels in the bottom quartile to an average of 815 litres for vessel in the top quartile.

On average, vessels consumed 767 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 440 litres and 1,269 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	60,904	58,568	30,478
Annual Litres	172,238	165,635	86,193
Cost per day at sea	288	295	212
Litres per day at sea	815	833	600
Litres per tonne landed	440	767	1,269

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £95,271 and after deducting depreciation and interest, vessels made on average a net profit of £68,575. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £180,611 (26% of total income) compared to the bottom quartile average operating profit of £7,691 (7% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

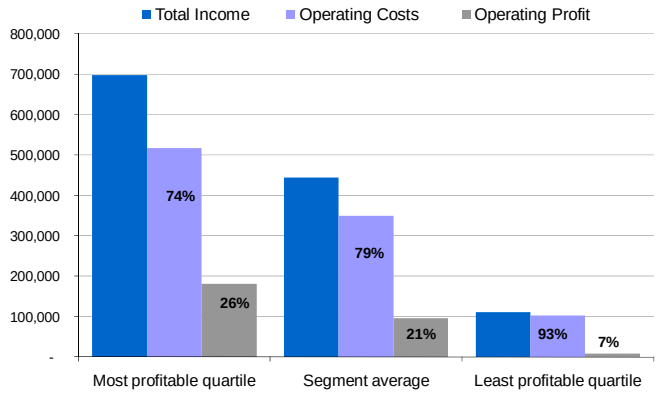

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	434,402	98%
Non-fishing Income	10,002	2%
Total Income	444,404	100%
Fuel costs	58,568	13%
Crew share	115,428	26%
Other Fishing Costs	27,000	6%
Total Fishing Costs	200,997	45%
Total Vessel Costs	148,136	33%
Total Operating Costs	349,133	79%
Operating Profit	95,271	21%
Depreciation	20,903	5%
Interest	5,792	1%
Other finance costs		0%
Net Profit	68,575	15%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.2 Area VIIA demersal trawl

- The segment comprised 9 vessels with an average length of 15m
- In total the segment landed 597 tonnes of seafood worth £0.6million in 2009
- On average, these vessels landed 66 tonnes, worth £63,519
- Scallops, nephrops, queen scallops and crabs were the key species for this segment
- On average vessels made a small operating profit of £15,659 in 2009

2009	Segment Total	Average per vessel
Active Vessels	9	-
Length (m)	-	15
Power (kW)	1,404	175
Registered Tonnage (GT)	286	36
VCU	1,232	154
Landings (Tonnes)	597	66
Fishing Income (£)	571,671	63,519
Days at Sea	703	78
Vessel Age	-	31
Crew	45	5

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Area VIIA demersal trawlers over 10m vessels are based at a number of ports along the west and south coasts of the UK including Brixham, Kirkcudbright and Exmouth. In 2009 there were fewer vessels active in this segment than in 2008 and their average size was much smaller than in 2008.

Vessels in this segment spent on average 78 days at sea in 2009 targeting mostly scallops, nephrops and queen scallops. On average vessels had 5 crew members and the segment employed 45 fishermen in total.

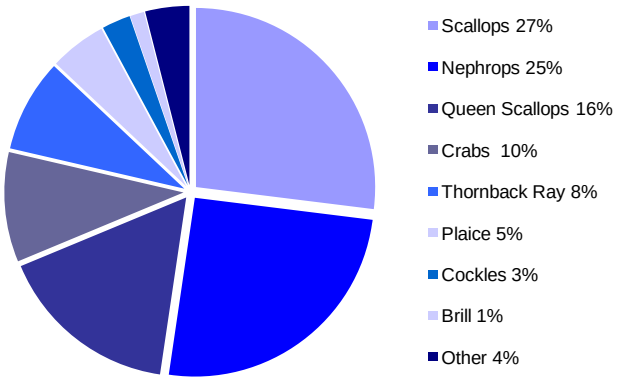

Figure 1. Value catch composition (Source: MMO, Seafish)

Income

The segment landed 597 tonnes of seafood worth £0.6million in 2009. Therefore on average, active vessels landed 66 tonnes, worth £63,519.

Queen scallops was the most important species to this segment in terms of volume with scallops most important in terms of value. Queen scallops accounted for 38% of the volume of landings but only 16% of value with scallops accounting for 15% and 27% respectively. The segment's average price for scallops was above the UK fleet average price for scallops, see Figure 3.

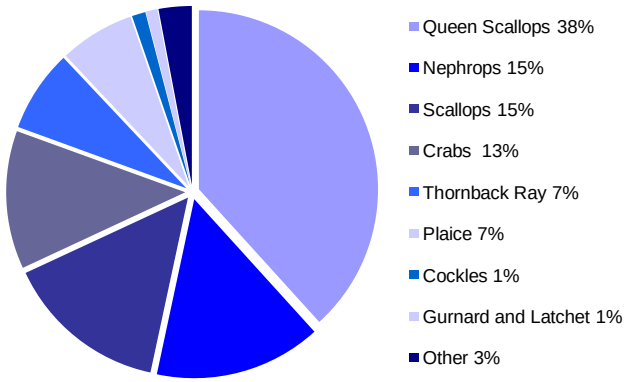

Figure 2. Volume catch composition (Source: MMO, Seafish)

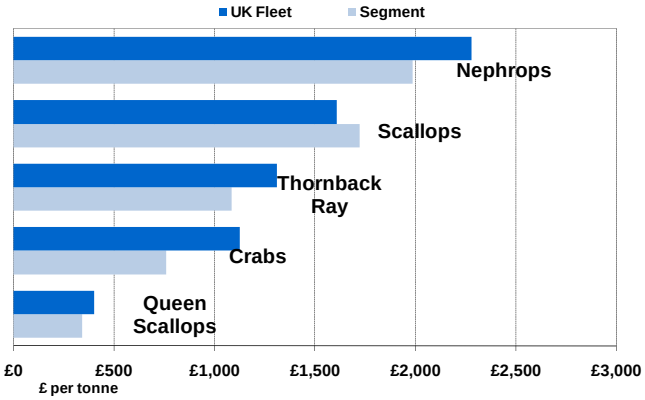

Figure 3. Average prices of key species (Source: MMO, Seafish)

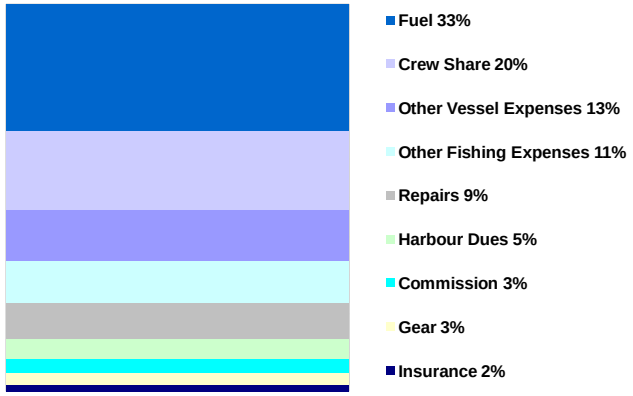

Figure 4. Operating costs breakdown (Source: Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 1.31 tonnes per day, obtained £1,090 per tonne and therefore earned £905 per day at sea. There was some variation between prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 3.06 compared to a segment average of 1.31 and 0.33 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	80,148	63,519	25,810
Tonnes / day	3.06	1.31	0.33
£ per tonne	744	1,090	1,229
£ per day	1,511	905	388
Days at Sea	84	78	69

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £53,571 or 77% of total income. There was a significant variation between quartiles, with total operating costs for the most profitable quartile equating to 69% of income compared to 99% in the least profitable quartile. Fuel and crew share were the largest fishing costs, on average accounting for 33% and 20% of total operating costs respectively.

Fuel

On average, vessels consumed 639 litres per day at sea costing £226 per day. Fuel consumption per day ranged from an average of 583 litres for vessels in the bottom quartile to an average of 500 litres for vessel in the top quartile.

On average, vessels consumed 1,086 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 368 litres and 1,808 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	14,763	17,484	13,083
Annual Litres	41,750	49,444	37,000
Cost per day at sea	177	226	206
Litres per day at sea	500	639	583
Litres per tonne landed	368	1,086	1,808

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £15,659 and after deducting depreciation and interest, vessels made on average a net profit of £10,578. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £27,057 (31% of total income) compared to the bottom quartile average operating profit of £384 (1% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

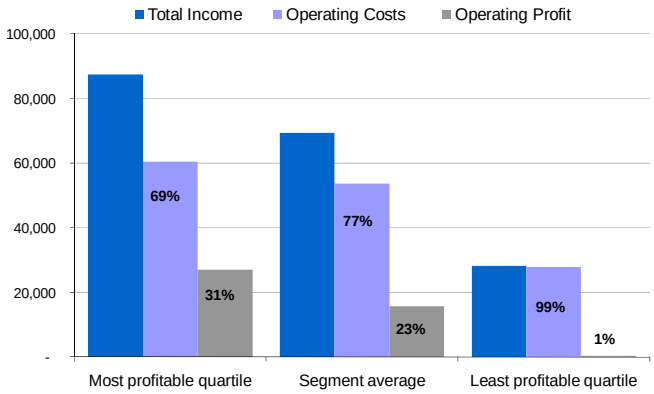

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	63,519	92%
Non-fishing Income	5,711	8%
Total Income	69,230	100%
Fuel costs	17,484	25%
Crew share	10,887	16%
Other Fishing Costs	10,371	15%
Total Fishing Costs	38,742	56%
Total Vessel Costs	14,830	21%
Total Operating Costs	53,571	77%
Operating Profit	15,659	23%
Depreciation	5,081	7%
Interest		0%
Other finance costs		0%
Net Profit	10,578	15%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.3 Area VIIA nephrops 250kW and over

- The segment comprised 36 vessels with an average length of 20m
- In total the segment landed 4,475 tonnes of seafood worth £6.6million in 2009
- On average, these vessels landed 124 tonnes, worth £183,512
- Nephrops were the key species for this segment
- On average vessels made an operating profit of £31,605 in 2009

2009	Segment Total	Average per vessel
Active Vessels	36	-
Length (m)	-	20
Power (kW)	12,201	339
Registered Tonnage (GT)	3,544	98
VCU	10,020	278
Landings (Tonnes)	4,475	124
Fishing Income (£)	6,606,420	183,512
Days at Sea	6,229	173
Vessel Age	-	33
Crew	191	5

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Area VIIa nephrops vessels over 250kW are based at a number of ports along the west and south coasts of the UK including Brixham, Kirkcudbright and Exmouth. All vessels in this newly defined segment are 10m or over. The power of the main engine has been used to make a clearer segment definition than .

Vessels in this segment spent on average 173 days at sea in 2009 targeting mostly nephrops. On average vessels had 5 crew members and the segment employed 191 fishermen in total.

Income

The segment landed 4,475 tonnes of seafood worth £6.6million in 2009. Therefore on average, active vessels landed 124 tonnes, worth £183,512.

Nephrops was the most important species to this segment in terms of both value and volume. The segment's average price for nephrops was well below the UK fleet average price for nephrops, see Figure 3.

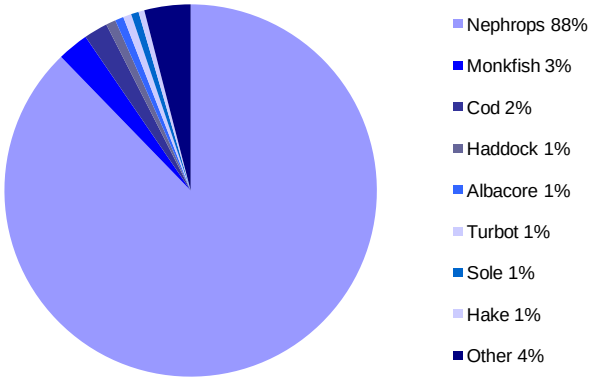

Figure 1. Value catch composition (Source: MMO, Seafish)

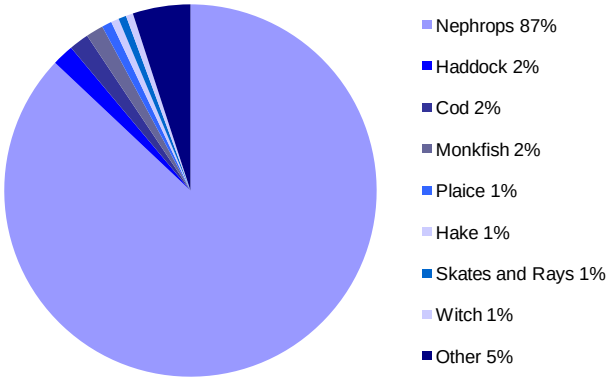

Figure 2. Volume catch composition (Source: MMO, Seafish)

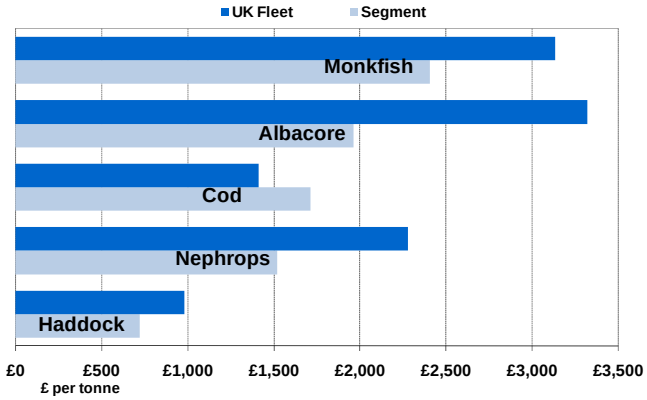

Figure 3. Average prices of key species (Source: MMO, Seafish)

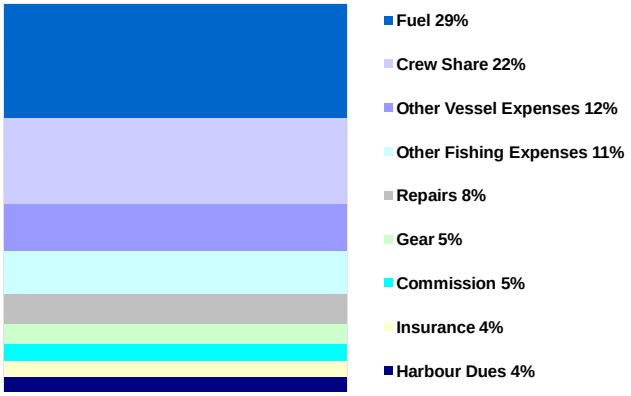

Figure 4. Operating costs breakdown (Source: Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.71 tonnes per day, obtained £1,502 per tonne and therefore earned £1,048 per day at sea. There was little variation in prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 0.83 compared to a segment average of 0.71 and 0.45 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	234,451	183,512	111,315
Tonnes / day	0.83	0.71	0.45
£ per tonne	1,451	1,502	1,533
£ per day	1,220	1,048	682
Days at Sea	189	173	162

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £151,906 or 83% of total income. There was some variation between quartiles, with total operating costs for the most profitable quartile equating to 77% of income compared to 94% in the least profitable quartile. Fuel and crew share were the largest fishing costs, on average accounting for 29% and 22% of total operating costs respectively.

Fuel

On average, vessels consumed 729 litres per day at sea costing £258 per day. Fuel consumption per day ranged from an average of 683 litres for vessels in the bottom quartile to an average of 629 litres for vessel in the top quartile.

On average, vessels consumed 1,107 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 734 litres and 1,544 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	42,745	44,541	39,489
Annual Litres	120,886	125,964	111,678
Cost per day at sea	222	258	242
Litres per day at sea	629	729	683
Litres per tonne landed	734	1,107	1,544

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £31,605 and after deducting depreciation and interest, vessels made on average a net profit of £5,557. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £54,538 (23% of total income) compared to the bottom quartile average operating profit of £6,700 (6% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

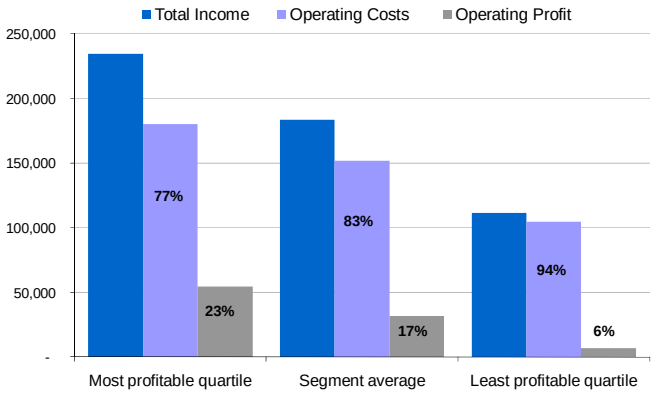

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	183,512	100%
Non-fishing Income	-	0%
Total Income	183,512	100%
Fuel costs	44,541	24%
Crew share	33,664	18%
Other Fishing Costs	29,793	16%
Total Fishing Costs	107,997	59%
Total Vessel Costs	43,909	24%
Total Operating Costs	151,906	83%
Operating Profit	31,605	17%
Depreciation	14,796	8%
Interest	3,638	2%
Other finance costs	7,614	4%
Net Profit	5,557	3%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.4 Area VIIA nephrops under 250kW

- The segment comprised 63 vessels with an average length of 15m
- In total the segment landed 3,937 tonnes of seafood worth £5.6million in 2009
- On average, these vessels landed 62 tonnes, worth £89,226
- Nephrops was the key species for this segment
- On average vessels made an operating profit of £20,723 in 2009

2009	Segment Total	Average per vessel
Active Vessels	63	-
Length (m)	-	15
Power (kW)	10,394	165
Registered Tonnage (GT)	2,602	41
VCU	9,719	154
Landings (Tonnes)	3,937	62
Fishing Income (£)	5,621,250	89,226
Days at Sea	8,227	131
Vessel Age	-	36
Crew	238	4

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Area VIIa nephrops vessels of 250kW and under are based at a number of ports along the west and south coasts of the UK including Brixham, Kirkcudbright and Exmouth.

Vessels in this newly defined segment spent on average 131 days at sea in 2009 targeting mostly nephrops. On average vessels had 4 crew members and the segment employed 238 fishermen in total.

Income

The segment landed 3,937 tonnes of seafood worth £5.6million in 2009. Therefore on average, active vessels landed 62 tonnes, worth £89,226.

Nephrops was the most important species to this segment in terms of both value and volume. The segment's average price for nephrops was well below the UK fleet average price for nephrops, see Figure 3.

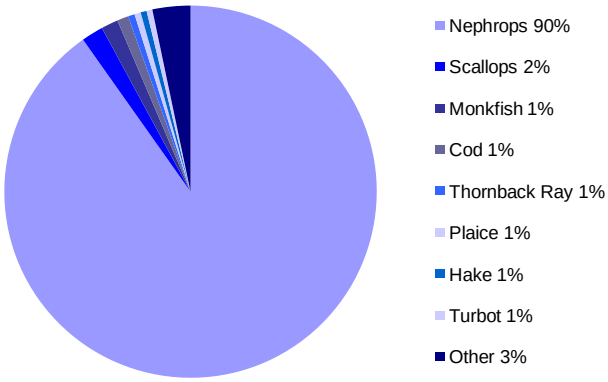

Figure 1. Value catch composition (Source: MMO, Seafish)

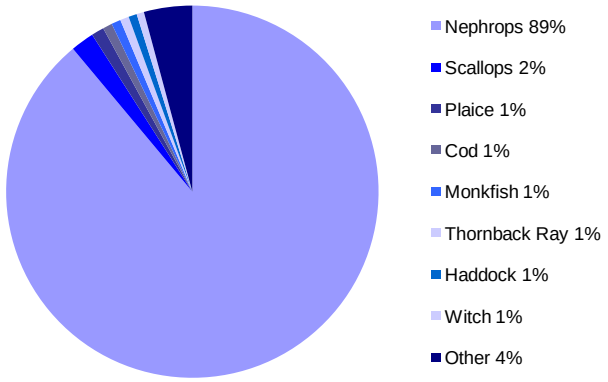

Figure 2. Volume catch composition (Source: MMO, Seafish)

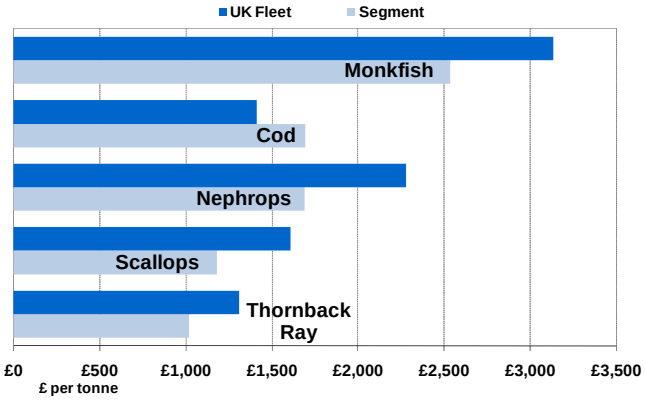

Figure 3. Average prices of key species (Source: MMO, Seafish)

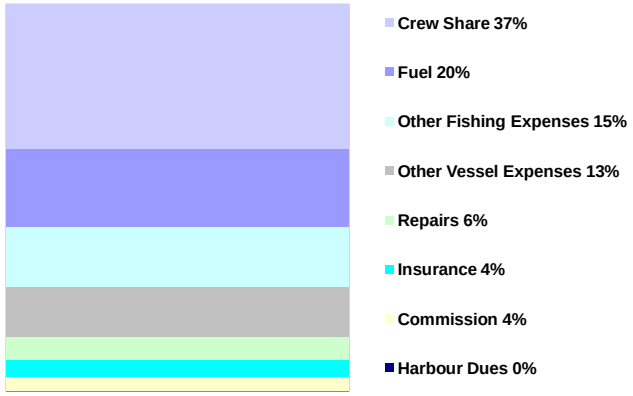

Figure 4. Operating costs breakdown (Source: Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.46 tonnes per day, obtained £1,455 per tonne and therefore earned £655 per day at sea. There was little variation in prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 0.53 to a segment average of 0.46 and 0.36 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	100,080	89,226	62,150
Tonnes / day	0.53	0.46	0.36
£ per tonne	1,491	1,455	1,446
£ per day	775	655	495
Days at Sea	128	131	117

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £74,200 or 78% of total income. There was a slight variation between quartiles, with total operating costs for the most profitable quartile equating to 71% of income compared to 86% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 37% and 20% of total operating costs respectively.

Fuel

On average, vessels consumed 316 litres per day at sea costing £112 per day. Fuel consumption per day ranged from an average of 359 litres for vessels in the bottom quartile to an average of 210 litres for vessel in the top quartile.

On average, vessels consumed 767 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 414 litres and 1,137 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	9,532	14,949	15,640
Annual Litres	26,956	42,277	44,229
Cost per day at sea	74	112	127
Litres per day at sea	210	316	359
Litres per tonne landed	414	767	1,137

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £20,723 and after deducting depreciation and interest, vessels made on average a net profit of £10,827. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £30,480 (29% of total income) compared to the bottom quartile average operating profit of £9,208 (14% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

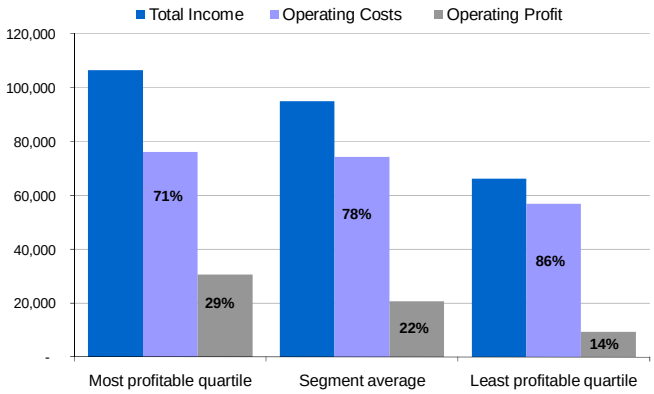

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	89,226	94%
Non-fishing Income	5,697	6%
Total Income	94,923	100%
Fuel costs	14,949	16%
Crew share	27,673	29%
Other Fishing Costs	14,363	15%
Total Fishing Costs	56,985	60%
Total Vessel Costs	17,215	18%
Total Operating Costs	74,200	78%
Operating Profit	20,723	22%
Depreciation	4,807	5%
Interest	3,520	4%
Other finance costs	1,569	2%
Net Profit	10,827	11%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.5 Area VIIB-K trawlers 10m - 24m

- The segment comprised 58 vessels with an average length of 13m
- In total the segment landed 4,728 tonnes of seafood worth £9million in 2009
- On average, these vessels landed 82 tonnes, worth £156,049
- A very wide spectrum of species was landed by this segment
- On average vessels made an operating profit of £40,901 in 2009

2009	Segment Total	Average per vessel
Active Vessels	58	-
Length (m)	-	13
Power (kW)	10,993	190
Registered Tonnage (GT)	1,944	34
VCU	8,764	151
Landings (Tonnes)	4,728	82
Fishing Income (£)	9,050,826	156,049
Days at Sea	10,077	174
Vessel Age	-	22
Crew	183	3

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Area VIIB-K trawlers 10m-24m are based at a number of ports along the west and south coasts of the UK including Brixham, Kirkcudbright and Exmouth. Vessels in this newly defined segment are 10m and over, upto 23.99m

Vessels in this segment spent on average 174 days at sea in 2009 targeting a mix of white fish and other species. On average vessels had 3 crew members and the segment employed 183 fishermen in total.

Income

The segment landed 4,728 tonnes of seafood worth £9million in 2009. Therefore on average, active vessels landed 82 tonnes, worth £156,049.

Lemon sole was the single most important species to this segment in terms of both value and volume. Lemon sole accounted for 14% of the volume of landings and 21% of value although a wide variety of other species accounted for the majority of this segment's value and volume. The segment's average price for lemon sole was marginally more the UK fleet average price for lemon sole, see Figure 3.

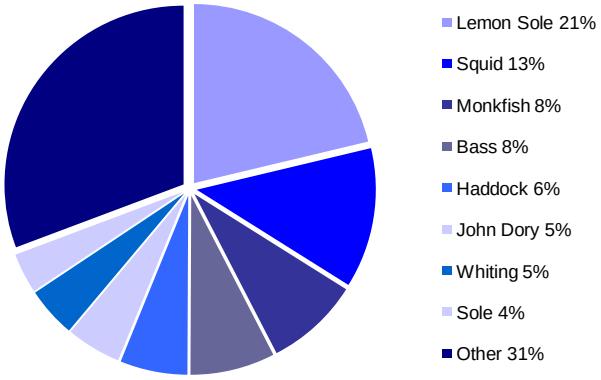

Figure 1. Value catch composition (Source: MMO, Seafish)

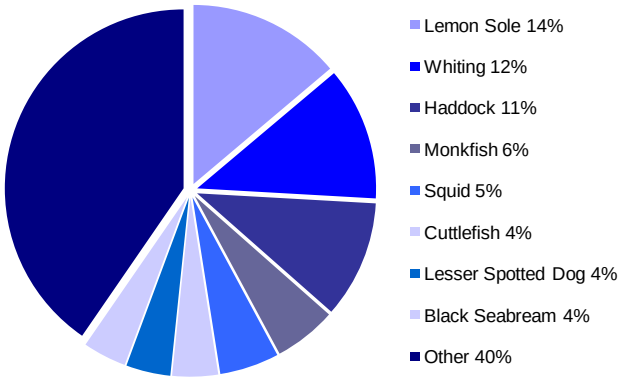

Figure 2. Volume catch composition (Source: MMO, Seafish)

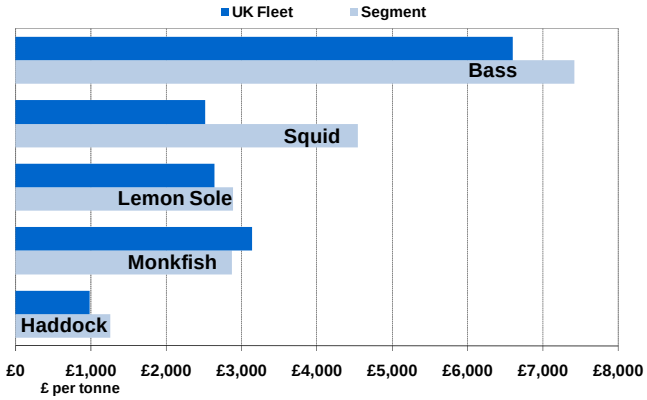

Figure 3. Average prices of key species (Source: MMO, Seafish)

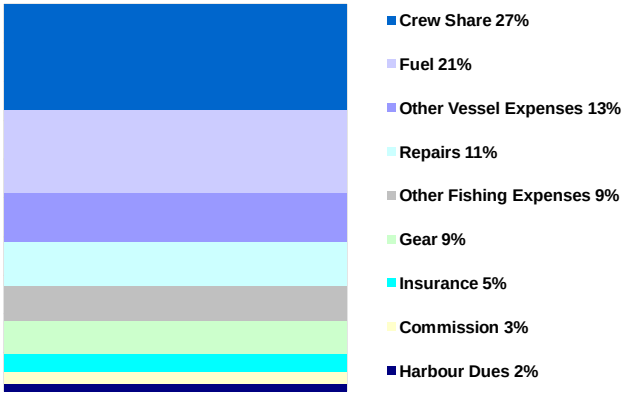

Figure 4. Operating costs breakdown (Source: Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.43 tonnes per day, obtained £2,087 per tonne and therefore earned £834 per day at sea. There was some variation in prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 0.81compared to a segment average of 0.43 and 0.22 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	298,796	156,049	64,461
Tonnes / day	0.81	0.43	0.22
£ per tonne	1,851	2,087	2,214
£ per day	1,411	834	466
Days at Sea	206	174	136

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £127,210 or 76% of total income. There was a significant variation between quartiles, with total operating costs for the most profitable quartile equating to 71% of income compared to 89% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 27% and 21% of total operating costs respectively.

Fuel

On average, vessels consumed 433 litres per day at sea costing £153 per day. Fuel consumption per day ranged from an average of 413 litres for vessels in the bottom quartile to an average of 485 litres for vessel in the top quartile.

On average, vessels consumed 1,287 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 671 litres and 2,013 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	35,548	27,247	20,415
Annual Litres	100,531	77,055	57,733
Cost per day at sea	171	153	146
Litres per day at sea	485	433	413
Litres per tonne landed	671	1,287	2,013

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £40,901 and after deducting depreciation and interest, vessels made on average a net profit of £31,501. There was a range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £94,939 (29% of total income) compared to the bottom quartile average operating profit of £7,736 (11% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

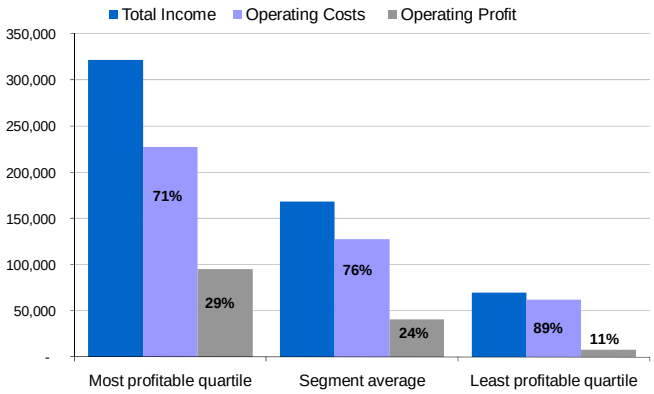

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	156,049	93%
Non-fishing Income	12,062	7%
Total Income	168,111	100%
Fuel costs	27,247	16%
Crew share	34,745	21%
Other Fishing Costs	18,073	11%
Total Fishing Costs	80,065	48%
Total Vessel Costs	47,145	28%
Total Operating Costs	127,210	76%
Operating Profit	40,901	24%
Depreciation	3,426	2%
Interest	4,556	3%
Other finance costs	1,419	1%
Net Profit	31,501	19%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.6 Area VIIB-K trawlers 24m - 40m

- The segment comprised 13 vessels with an average length of 34m
- In total the segment landed 5,329 tonnes of seafood worth £13million in 2009
- On average, these vessels landed 410 tonnes, worth £1million
- Monkfish and megrim were the key species for this segment

2009	Segment Total	Average per vessel
Active Vessels	13	-
Length (m)	-	34
Power (kW)	9,163	705
Registered Tonnage (GT)	4,162	320
VCU	7,754	596
Landings (Tonnes)	5,329	410
Fishing Income (£)	13,350,657	1,026,974
Days at Sea	3,490	268
Vessel Age	-	19
Crew	137	11

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Area VIIB-K trawlers 24m - 40m are based primarily at ports around South West England, Wales and North West England and several are Spanish-owned vessels.

Vessels in this segment spent on average 137 days at sea in 2009 targeting mainly monkfish and megrim. On average vessels had 11 crew members and the segment employed 137 fishermen in total.

Income

The segment landed 5,329 tonnes of seafood worth £13.4million in 2009. Therefore on average, active vessels landed 410 tonnes, worth £1million.

Monkfish and megrim were the two most important species to this segment in terms of value with megrim being most important in volume. Monkfish accounted for 24% of the volume of landings but 31% of value. The segment's average prices for monkfish was identical to the UK fleet average price for monkfish and their price for megrim was slightly below the UK average, see Figure 3.

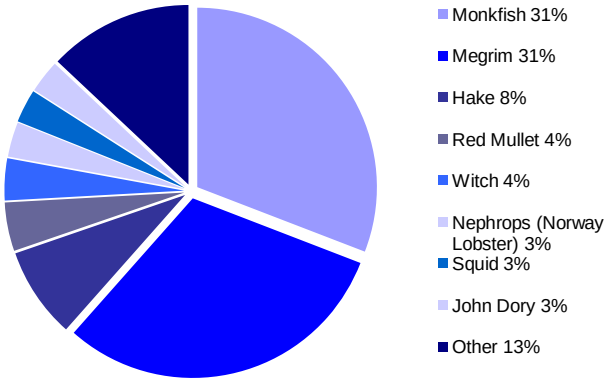

Figure 1. Value catch composition (Source: MMO, Seafish)

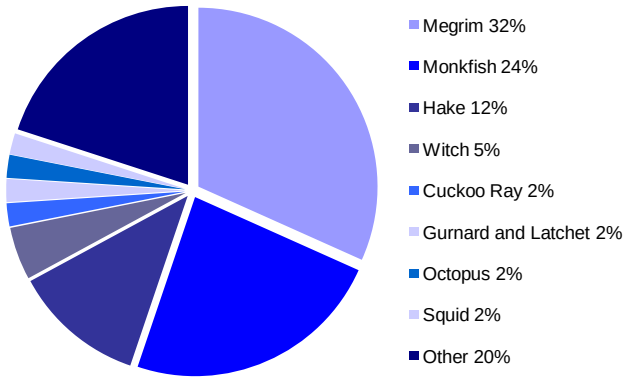

Figure 2. Volume catch composition (Source: MMO, Seafish)

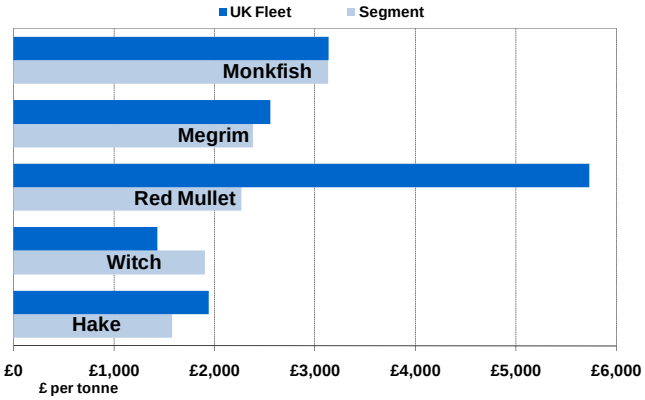

Figure 3. Average prices of key species (Source: MMO, Seafish)

Table 2 shows that on average vessels in this segment landed 1.48 tonnes per day, obtained £2,495 per tonne and therefore earned £3,692 per day at sea.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)		1,026,974	
Tonnes / day		1.48	
£ per tonne		2,495	
£ per day		3,692	
Days at Sea		268	

Table 2. Landings per day at sea (Source: Seafish, MMO)

Fuel

On average, vessels consumed 2,577 litres per day at sea costing £911 per day.

On average, vessels consumed 2,061 litres of fuel per tonne of seafood landed.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost		244,678	
Annual Litres		691,962	
Cost per day at sea		911	
Litres per day at sea		2,577	
Litres per tonne landed		2,061	

Table 3. Fuel cost and consumption (Source: Seafish)

2.7 Gill netters

- The segment comprised 41 vessels with an average length of 18m
- In total the segment landed 6,001 tonnes of seafood worth £14million in 2009
- On average, these vessels landed 146 tonnes, worth £339,879
- Monkfish was the key species for this segment
- On average vessels made an operating profit of £70,262 in 2009

2009	Segment Total	Average per vessel
Active Vessels	41	-
Length (m)	-	18
Power (kW)	10,639	259
Registered Tonnage (GT)	3,951	96
VCU	8,983	225
Landings (Tonnes)	6,001	146
Fishing Income (£)	13,935,024	339,879
Days at Sea	6,107	149
Vessel Age	-	28
Crew	194	5

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Gill netters are based at ports around the UK from the Shetland Isles to Cornwall.

Vessels in this segment spent on average 149 days at sea in 2009 targeting mostly monkfish. On average vessels had 5 crew members and the segment employed 194 fishermen in total.

Income

The segment landed 6,001 tonnes of seafood worth £14million in 2009. Therefore on average, active vessels landed 146 tonnes, worth £339,878.

Monkfish was the most important species to this segment in terms of both value and volume. The segment's average price for monkfish was slightly more than the UK fleet average price for monkfish, see Figure 3.

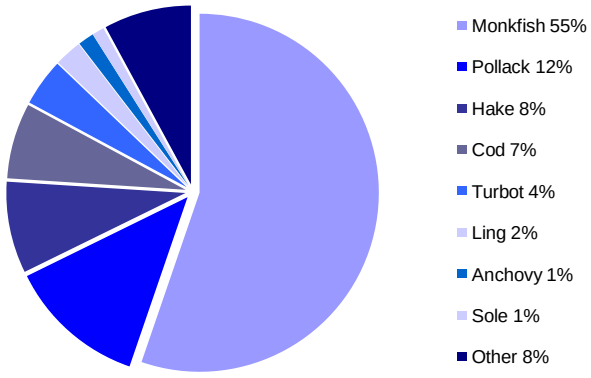

Figure 1. Value catch composition (Source: MMO, Seafish)

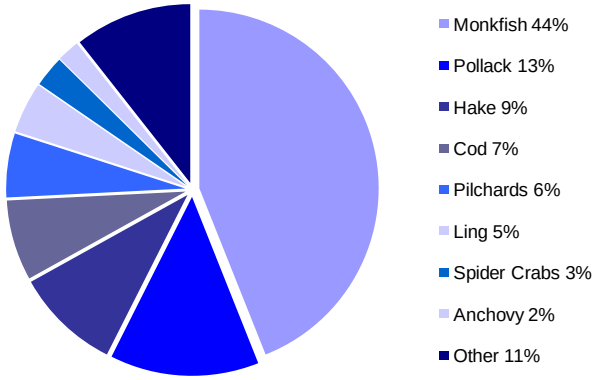

Figure 2. Volume catch composition (Source: MMO, Seafish)

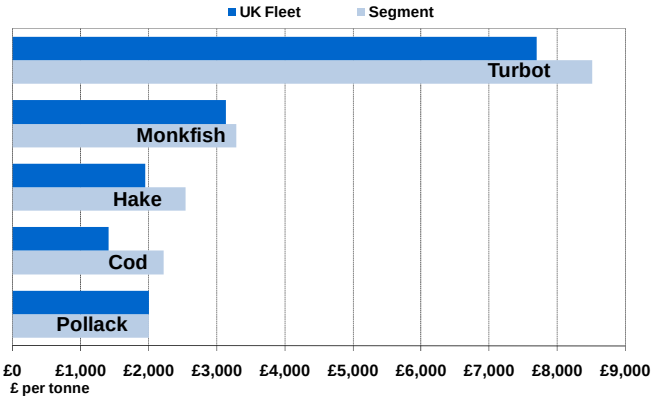

Figure 3. Average prices of key species (Source: MMO, Seafish)

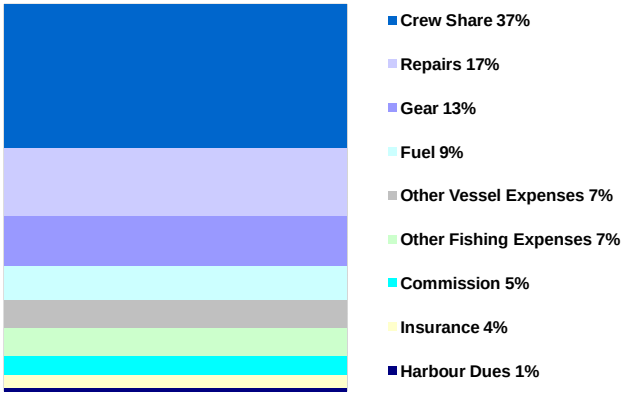

Figure 4. Operating costs breakdown (Source: Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.98 tonnes per day, obtained £2,831 per tonne and therefore earned £2,011 per day at sea. There was some variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 1.33 compared to a segment average of 0.98 and 0.34 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	781,605	339,879	91,428
Tonnes /day	1.33	0.98	0.34
£ per tonne	3,109	2,831	3,390
£ per day	4,240	2,011	730
Days at Sea	183	149	119

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £269,616 or 79% of total income. There was some variation between quartiles, with total operating costs for the most profitable quartile equating to 77% of income compared to 88% in the least profitable quartile. Crew share and repairs were the largest fishing costs, on average accounting for 37% and 17% of total operating costs respectively.

Fuel

On average, vessels consumed 400 litres per day at sea costing £141 per day. Fuel consumption per day ranged from an average of 327 litres for vessels in the bottom quartile to an average of 500 litres for vessel in the top quartile.

On average, vessels consumed 1,068 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 373 litres and 2,552 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	34,140	23,410	14,408
Annual Litres	96,550	66,205	40,745
Cost per day at sea	177	141	116
Litres per day at sea	500	400	327
Litres per tonne landed	373	1,068	2,552

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £70,262 and after deducting depreciation and interest, vessels made on average a net profit of £55,377. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £181,275 (23% of total income) compared to the bottom quartile average operating profit of £10,790 (12% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

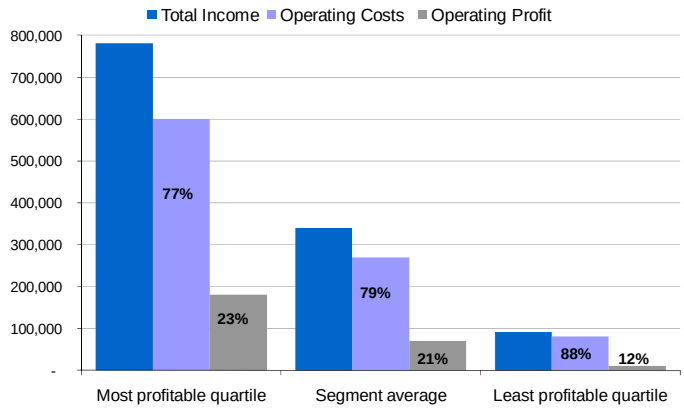

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	339,879	100%
Non-fishing Income	-	0%
Total Income	339,879	100%
Fuel costs	23,410	7%
Crew share	100,307	30%
Other Fishing Costs	34,662	10%
Total Fishing Costs	158,379	47%
Total Vessel Costs	111,237	33%
Total Operating Costs	269,616	79%
Operating Profit	70,262	21%
Depreciation	7,454	2%
Interest	2,370	1%
Other finance costs	5,062	1%
Net Profit	55,377	16%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.8 Longliners

- The segment comprised 29 vessels with an average length of 25m
- In total the segment landed 7,676 tonnes of seafood worth £15.3million in 2009
- On average, these vessels landed 265 tonnes, worth £529,818
- Hake was the key species for this segment

2009	Segment Total	Average per vessel
Active Vessels	29	-
Length (m)	-	25
Power (kW)	11,219	387
Registered Tonnage (GT)	4,634	160
VCU	10,028	346
Landings (Tonnes)	7,676	265
Fishing Income (£)	15,364,721	529,818
Days at Sea	5,471	189
Vessel Age	-	33
Crew	186	6

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Vessels over 10m mainly using long lines are based primarily at ports around Scotland although a few are registered in England. Some also fish from Spanish ports. There was a significant increase in vessels falling within this segment in 2009 compared to 2008. The segment contains some vessels over 30m in length and some not much over 10m.

Vessels in this segment spent on average 189 days at sea in 2009 targeting mostly hake. On average vessels had 6 crew members and the segment employed 186 fishermen in total.

Income

The segment landed 7,676 tonnes of seafood worth £15.4million in 2009. Therefore on average, active vessels landed 265 tonnes, worth £529,818.

Hake was the most important species to this segment in terms of both value and volume. The segment's average price for hake was well above the UK fleet average price for hake, see Figure 3.

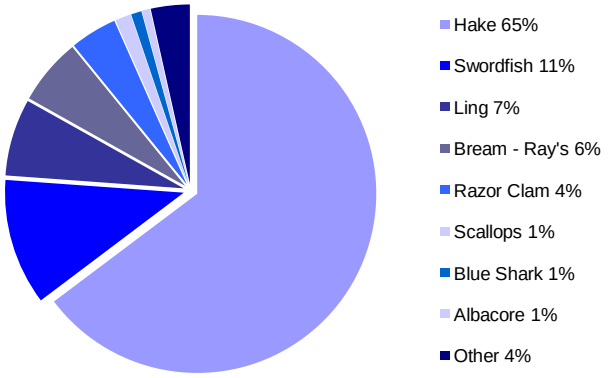

Figure 1. Value catch composition (Source: MMO, Seafish)

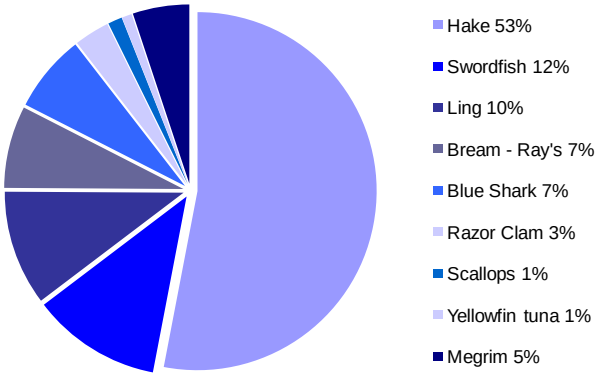

Figure 2. Volume catch composition (Source: MMO, Seafish)

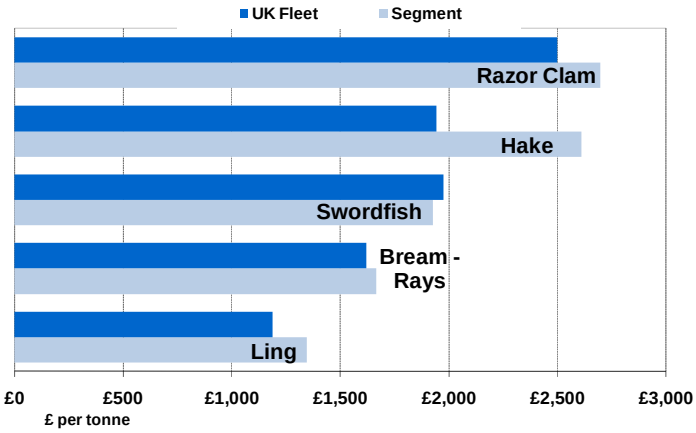

Figure 3. Average prices of key species (Source: MMO, Seafish)

Table 2 shows that on average vessels in this segment landed 1.13 tonnes per day, obtained £2,780 per tonne and therefore earned £2,484 per day at sea.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)		529,818	
Tonnes / day		1.13	
£ per tonne		2,780	
£ per day		2,484	
Days at Sea		189	

Table 2. Landings per day at sea (Source: Seafish, MMO)

Fuel

On average, vessels consumed 1,293 litres per day at sea costing £457 per day.

On average, vessels consumed 981 litres of fuel per tonne of seafood landed.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost		93,040	
Annual Litres		263,122	
Cost per day at sea		457	
Litres per day at sea		1,293	
Litres per tonne landed		981	

Table 3. Fuel cost and consumption (Source: Seafish)

2.9 Low activity vessels 10m and over

- The segment comprised 69 vessels with an average length of 12m
- In total this group of vessels landed 1,549 tonnes of seafood worth £275,635 in 2009
- On average, these vessels landed 22 tonnes, worth £3,995

2009	Segment Total	Average per vessel
Active Vessels	69	-
Length (m)	-	12
Power (kW)	9,431	141
Registered Tonnage (GT)	1,872	28
VCU	7,788	115
Landings (Tonnes)	1,549	22
Fishing Income (£)	275,635	3,995
Days at Sea	1,315	19
Vessel Age	-	28
Crew	184	3

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Low activity vessels 10m and over consists of vessels earning less than £10,000 in fishing income during 2009 or fishing less than 20% of the average days of sea for the segment in which they would otherwise have been included. These vessels are not considered to be commercially active and have been excluded from the analysis of the main over 10m segments to prevent the averages for the other segments being skewed by these vessels.

Vessel activity

Vessels in this segment are based throughout the UK. Total landings of these 69 vessels in 2009 were 1,549 tonnes worth £275,635 in 2009. On average vessels spent 19 days at sea and landed 22 tonnes worth £3,995.

2.10 Low activity vessels under 10m

- The segment comprised 1,829 vessels with an average length of 6.6m
- In total the segment landed 2,757 tonnes of seafood worth £5.8million in 2009
- On average, these vessels landed 1.5 tonnes, worth £3,144

2009	Segment Total	Average per vessel
Active Vessels	1,829	-
Length (m)	-	6.6
Power (kW)	72,543	40
Registered Tonnage (GT)	4,692	3
VCU	64,808	35
Landings (Tonnes)	2,757	1.5
Fishing Income (£)	5,751,177	3,144
Days at Sea	45,220	25
Vessel Age	-	22
Crew	2,376	1

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Low activity vessels under 10m consists of vessels earning less than £10,000 in fishing income during 2009 or fishing less than 20% of the average days of sea for the segment in which they would otherwise have been included. These vessels are not considered to be commercial active and have been excluded from the analysis of the main under 10m segments to prevent the averages for the other segments being skewed by these non-commercial vessels.

Vessel activity

The vessels in this segment are based throughout the UK. Vessels in this segment are small; average length 6.6m and average power 40kW. Total landings of the segment in 2009 were 2,757 tonnes worth £5.8 million in 2009. On average vessels spent 22 days at sea and landed 1.5 tonnes worth £3,144.

2.11 Miscellaneous vessels

- The segment comprised 54 vessels with an average length of 24m
- In total the segment landed 53,612 tonnes of seafood worth £41.6million in 2009
- On average, these vessels landed 993 tonnes, worth £771,016

2009	Segment Total	Average per vessel
Active Vessels	54	-
Length (m)	-	24
Power (kW)	28,221	523
Registered Tonnage (GT)	10,415	193
VCU	23,763	440
Landings (Tonnes)	53,612	993
Fishing Income (£)	41,634,882	771,016
Days at Sea	8,075	150
Vessel Age	-	25
Crew	244	5

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

The Miscellaneous segment consists of vessels that could not be assigned to any other segment based on the segment criteria or because there were fewer than nine vessels in a segment.

Vessel activity

The vessels in this segment are based throughout the UK. Total landings of the segment in 2009 were 53,612 tonnes worth £41.6 million in 2009. On average vessels spent 150 days at sea and landed 993 tonnes worth £771,016.

2.12 North Sea beam trawl 300kW and over

- The segment comprised 9 vessels with an average length of 39m
- In total the segment landed 7,643 tonnes of seafood worth £10.5million in 2009
- On average, these vessels landed 849 tonnes, worth £1.1million
- Plaice, sole and turbot were the key species for this segment

2009	Segment Total	Average per vessel
Active Vessels	9	-
Length (m)	-	39
Power (kW)	12,687	1,410
Registered Tonnage (GT)	3,922	436
VCU	7,114	790
Landings (Tonnes)	7,643	849
Fishing Income (£)	10,574,152	1,174,906
Days at Sea	2,066	230
Vessel Age	-	21
Crew	99	11

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

North Sea beam trawl vessels 300kW and over are based at a number of ports along the east and south coasts of the UK and also in the Netherlands.

Vessels in this segment spent on average 230 days at sea in 2009 targeting mostly plaice, sole and turbot. On average vessels had 11 crew members and the segment employed 99 fishermen in total.

Income

The segment landed 7,643 tonnes of seafood worth £10.5million in 2009. Therefore on average, active vessels landed 849 tonnes, worth £1.1million.

Plaice was the most important species to this segment in terms of both value and volume. Sole accounted for 25% of the value of landings but just 5% of volume. The segment's average price for plaice was identical to the UK fleet average price for plaice, but their price for sole was well above UK average, see Figure 3.

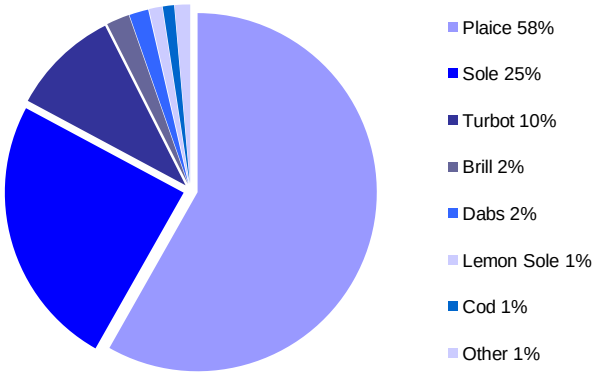

Figure 1. Value catch composition (Source: MMO, Seafish)

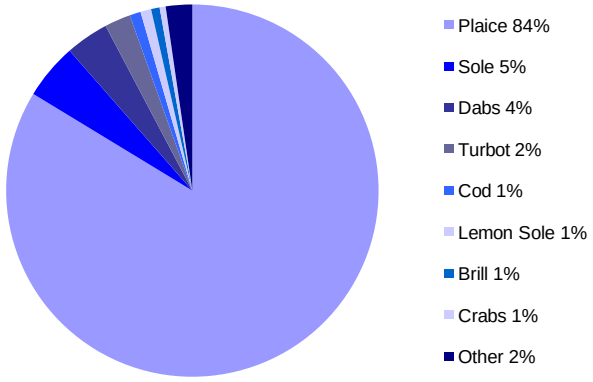

Figure 2. Volume catch composition (Source: MMO, Seafish)

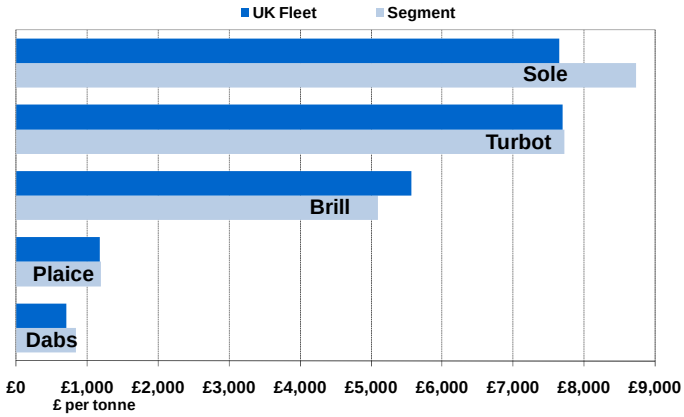

Figure 3. Average prices of key species (Source: MMO, Seafish)

Table 2 shows that on average vessels in this segment landed 3.73 tonnes per day, obtained £1,387 per tonne and therefore earned £5,232 per day at sea.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)		1,174,906	
Tonnes / day		3.73	
£ per tonne		1,387	
£ per day		5,232	
Days at Sea		230	

Table 2. Landings per day at sea (Source: Seafish, MMO)

Fuel

On average, vessels consumed 5,517 litres per day at sea costing £1,951 per day.

On average, vessels consumed 1,641 litres of fuel per tonne of seafood landed.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost		447,174	
Annual Litres		1,264,633	
Cost per day at sea		1,951	
Litres per day at sea		5,517	
Litres per tonne landed		1,641	

Table 3. Fuel cost and consumption (Source: Seafish)

2.13 North Sea beam trawl under 300kW

- The segment comprised 27 vessels with an average length of 14m
- In total the segment landed 1,156 tonnes of seafood worth £1.7million in 2009
- On average, these vessels landed 43 tonnes, worth £61,294
- Brown shrimp was the key species for this segment
- On average vessels made a small operating profit of £2,857 in 2009

2009	Segment Total	Average per vessel
Active Vessels	27	-
Length (m)	-	14
Power (kW)	5,033	186
Registered Tonnage (GT)	761	28
VCU	4,268	158
Landings (Tonnes)	1,156	43
Fishing Income (£)	1,654,925	61,294
Days at Sea	2,797	104
Vessel Age	-	19
Crew	83	3

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

North Sea beam trawl vessels under 300kW are based at a number of ports along the east and south coasts of the UK.

Vessels in this segment spent on average 104 days at sea in 2009 targeting mostly brown shrimps. On average vessels had 3 crew members and the segment employed 83 fishermen in total.

Income

The segment landed 1,156 tonnes of seafood worth £1.7million in 2009. Therefore on average, active vessels landed 43 tonnes, worth £61,294.

Brown shrimps was the most important species to this segment in terms of both value and volume. Mussels accounted for 21% of the volume of landings but just 1% of value. The segment's average price for brown shrimps was slightly below the UK fleet average price for brown shrimps, see Figure 3.

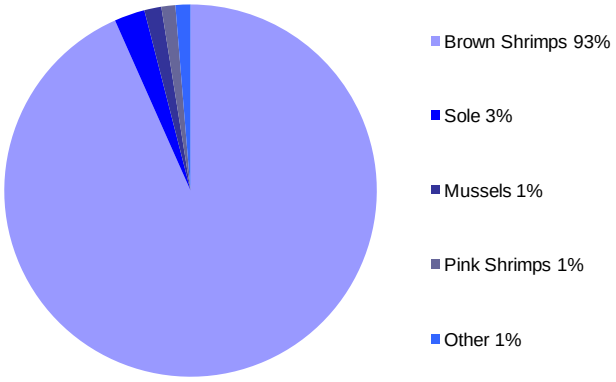

Figure 1. Value catch composition (Source: MMO, Seafish)

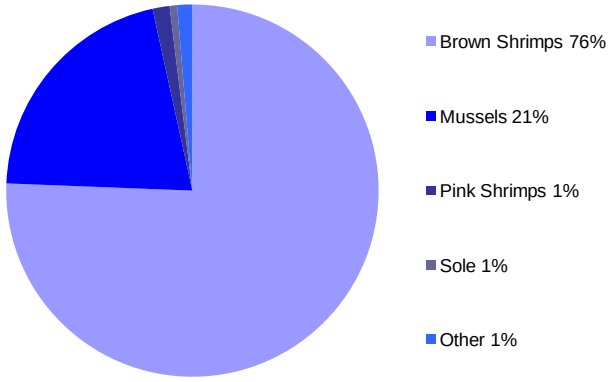

Figure 2. Volume catch composition (Source: MMO, Seafish)

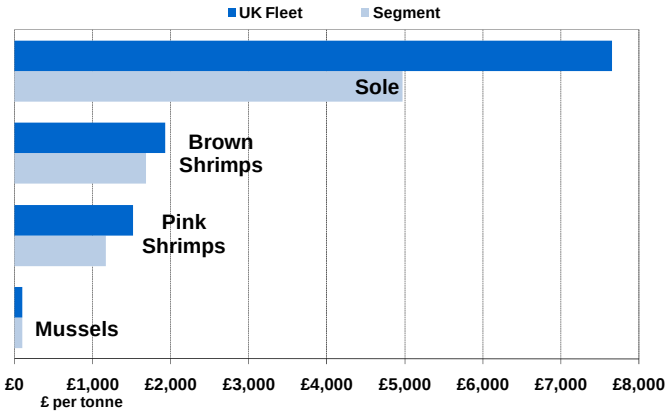

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.72 tonnes per day, obtained £1,673 per tonne and therefore earned £667 per day at sea. There was little variation in prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 2.18 compared to a segment average of 0.72 and 0.24 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	62,893	61,294	39,413
Tonnes / day	2.18	0.72	0.24
£ per tonne	1,261	1,673	1,556
£ per day	1,113	667	372
Days at Sea	74	104	101

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £60,229 or 95% of total income. There was a significant variation between quartiles, with total operating costs for the most profitable quartile equating to 76% of income compared to 124% in the least profitable quartile. Fuel and crew share were the largest fishing costs, on average accounting for 60% and 24% of total operating costs respectively.

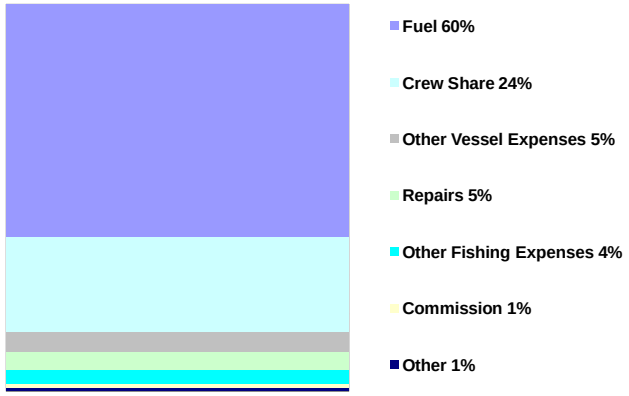

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 981 litres per day at sea costing £347 per day. Fuel consumption per day ranged from an average of 969 litres for vessels in the bottom quartile to an average of 875 litres for vessel in the top quartile.

On average, vessels consumed 3,077 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 1,369 litres and 4,230 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	24,531	36,224	34,907
Annual Litres	69,375	102,444	98,719
Cost per day at sea	309	347	343
Litres per day at sea	875	981	969
Litres per tonne landed	1,369	3,077	4,230

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £2,857 and after deducting depreciation and interest, vessels made on average a net loss of £13,606. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £15,571 (24% of total income) compared to the bottom quartile average operating loss of £9,777 (-24% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit/loss for the top and bottom quartiles and the segment average.

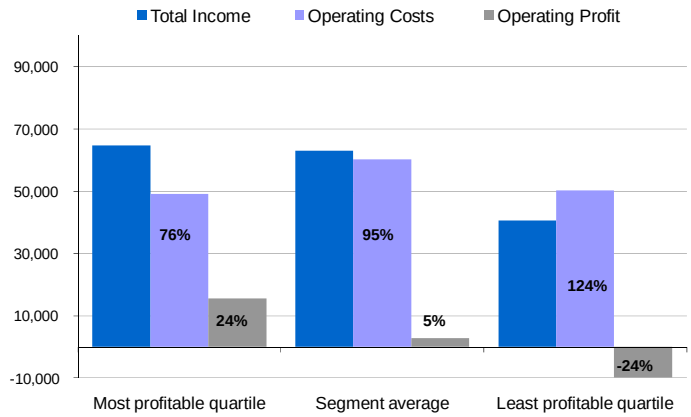

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	61,294	97%
Non-fishing Income	1,793	3%
Total Income	63,086	100%
Fuel costs	36,224	57%
Crew share	14,748	23%
Other Fishing Costs	3,172	5%
Total Fishing Costs	54,145	86%
Total Vessel Costs	6,084	10%
Total Operating Costs	60,229	95%
Operating Profit	2,857	5%
Depreciation	13,405	21%
Interest	2,919	5%
Other finance costs	139	0%
Net Profit	-13,606	-22%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.14 North Sea nephrops 300kW and over

- The segment comprised 83 vessels with an average length of 21m
- In total the segment landed 19,968 tonnes of seafood worth £36.5million in 2009
- On average, these vessels landed 241 tonnes, worth £439,389
- Nephrops was the key species for this segment
- On average vessels made an operating profit of £74,984 in 2009

2009	Segment Total	Average per vessel
Active Vessels	83	-
Length (m)	-	21
Power (kW)	34,671	423
Registered Tonnage (GT)	12,459	152
VCU	27,894	336
Landings (Tonnes)	19,968	241
Fishing Income (£)	36,469,252	439,389
Days at Sea	16,206	195
Vessel Age	-	21
Crew	506	6

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

North Sea nephrops trawl vessels 300kW and over are based at a number of ports along the north east coast of England and the east coast of Scotland. This newly defined segment replaces the previous NS nephrops twin rig trawl segment with a large degree of overlap in membership. This segment therefore may contain some larger single rig vessels.

Vessels in this segment spent on average 195 days at sea in 2009 targeting mostly nephrops. On average vessels had 6 crew members and the segment employed 506 fishermen in total.

Income

The segment landed 19,968 tonnes of seafood worth £36.5million in 2009. Therefore on average, active vessels landed 241 tonnes, worth £439,389.

Nephrops was the most important species to this segment in terms of both value and volume. Haddock accounted for 13% of the volume of landings but just 4% of value. The segment's average price for nephrops was the same as the UK fleet average price for nephrops, see Figure 3.

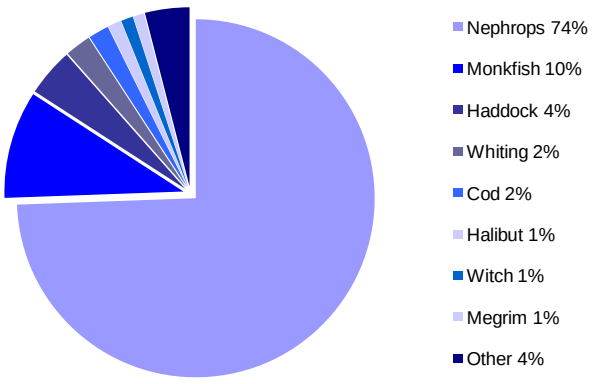

Figure 1. Value catch composition (Source: MMO, Seafish)

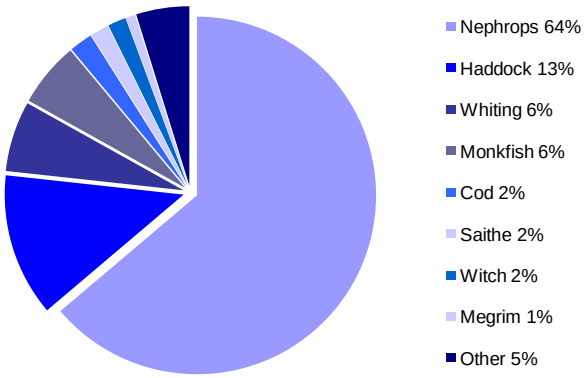

Figure 2. Volume catch composition (Source: MMO, Seafish)

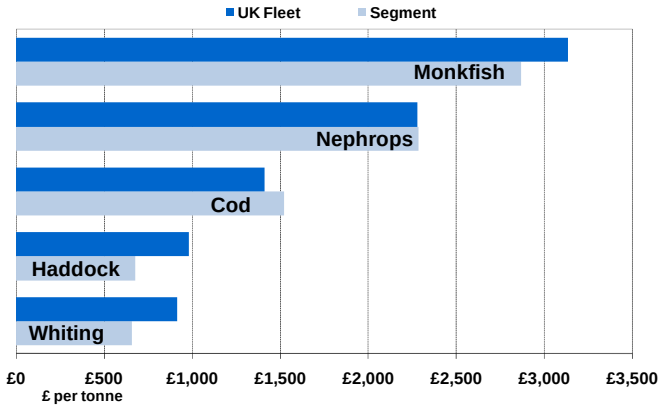

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 1.20 tonnes per day, obtained £1,813 per tonne and therefore earned £2,168 per day at sea. There was some variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 1.44 compared to a segment average of 1.20 and 0.93 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	610,107	439,389	276,858
Tonnes / day	1.44	1.20	0.93
£ per tonne	1,948	1,813	1,772
£ per day	2,762	2,168	1,630
Days at Sea	216	195	169

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £403,543 or 84% of total income. There was a variation between quartiles, with total operating costs for the most profitable quartile equating to 77% of income compared to 97% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 38% and 20% of total operating costs respectively.

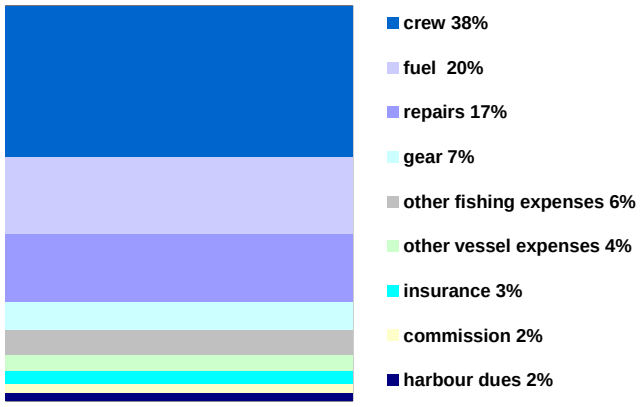

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 1,514 litres per day at sea costing £536 per day. Fuel consumption per day ranged from an average of 1,719 litres for vessels in the bottom quartile to an average of 1,279 litres for vessel in the top quartile.

On average, vessels consumed 1,344 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 905 litres and 1,921 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	99,434	105,311	103,186
Annual Litres	281,205	297,824	291,814
Cost per day at sea	452	536	608
Litres per day at sea	1,279	1,514	1,719
Litres per tonne landed	905	1,344	1,921

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £74,984 and after deducting depreciation and interest, vessels made on average a net profit of £21,607. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £150,912 (23% of total income) compared to the bottom quartile average operating profit of £10,418 (3% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

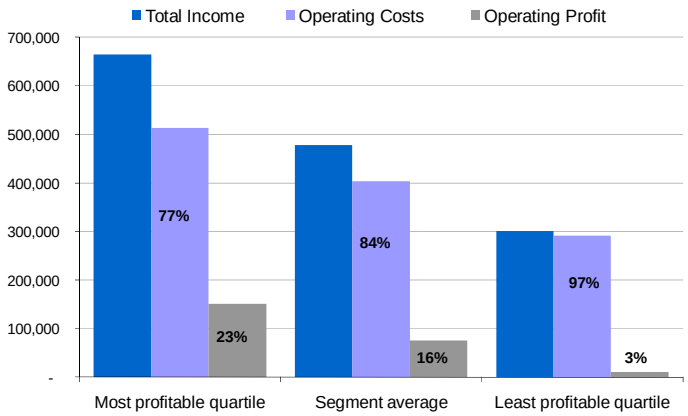

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	439,389	92%
Non-fishing Income	39,138	8%
Total Income	478,527	100%
Fuel costs	105,311	22%
Crew share	111,689	23%
Other Fishing Costs	71,930	15%
Total Fishing Costs	288,930	60%
Total Vessel Costs	114,613	24%
Total Operating Costs	403,543	84%
Operating Profit	74,984	16%
Depreciation	33,030	7%
Interest	12,377	3%
Other finance costs	7,969	2%
Net Profit	21,607	5%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.15 North Sea nephrops under 300kW

- The segment comprised 84 vessels with an average length of 14m
- In total the segment landed 8,538 tonnes of seafood worth £15million in 2009
- On average, these vessels landed 102 tonnes, worth £178,039
- Nephrops was the key species for this segment
- On average vessels made an operating profit of £23,440 in 2009

2009	Segment Total	Average per vessel
Active Vessels	84	-
Length (m)	1,209	14
Power (kW)	15,755	188
Registered Tonnage (GT)	3,978	47
VCU	13,559	161
Landings (Tonnes)	8,538	102
Fishing Income (£)	14,955,303	178,039
Days at Sea	12,528	149
Vessel Age	-	28
Crew	296	4

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

North Sea nephrops trawl vessels under 300kW are based at a number of ports along the north east coast of England and the east coast of Scotland. This newly defined segment replaces the previous NS nephrops single rig trawl segment with a large degree of overlap in membership. This segment therefore may contain some smaller twin rig vessels.

Vessels in this segment spent on average 149 days at sea in 2009 targeting mostly nephrops. On average vessels had 4 crew members and the segment employed 296 fishermen in total.

Income

The segment landed 8,538 tonnes of seafood worth £15million in 2009. Therefore on average, active vessels landed 102 tonnes, worth £178,039.

Nephrops was the most important species to this segment in terms of both value and volume. Haddock accounted for 12% of the volume of landings and 5% of value. The segment's average price for nephrops was slightly below the UK fleet average price for nephrops, see Figure 3.

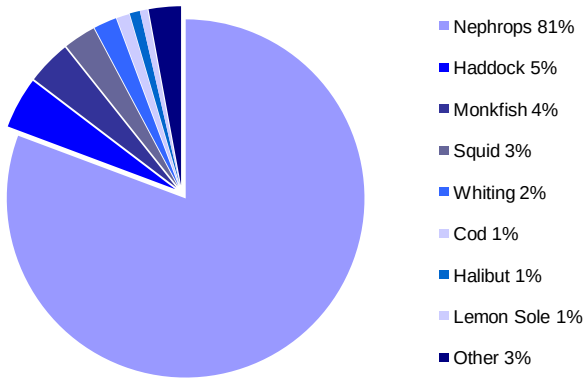

Figure 1. Value catch composition (Source: MMO, Seafish)

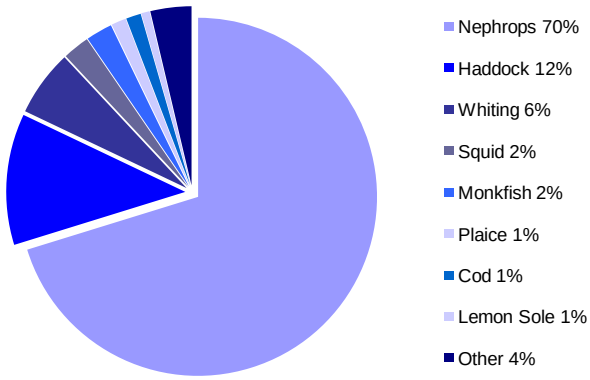

Figure 2. Volume catch composition (Source: MMO, Seafish)

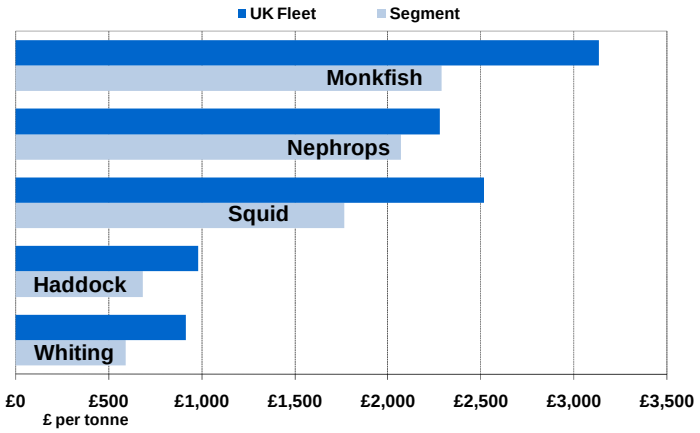

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.61tonnes per day, obtained £1,856 per tonne and therefore earned £1,077 per day at sea. There was some variation in prices per tonne achieved between quartiles and vessels in the top quartile landed slightly more tonnes per day at 0.69 compared to a segment average of 0.61and 0.48 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	216,252	178,039	126,029
Tonnes / day	0.69	0.61	0.48
£ per tonne	1,996	1,856	1,690
£ per day	1,375	1,077	778
Days at Sea	143	149	150

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £171,142 or 88% of total income. There was a significant variation between quartiles, with total operating costs for the most profitable quartile equating to 79% of income compared to 104% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 25% each of total operating costs.

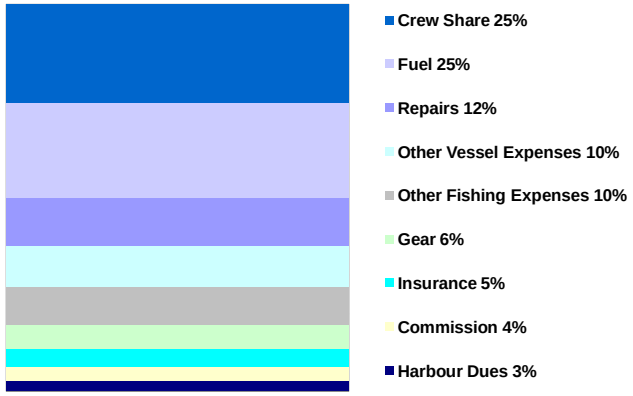

Figure 4. Operating cost breakdown (Source: Seafish)

Fuel

On average, vessels consumed 727 litres per day at sea costing £257 per day. Fuel consumption per day ranged from an average of 918 litres for vessels in the bottom quartile to an average of 544 litres for vessel in the top quartile.

On average, vessels consumed 1,380 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 823 litres and 2,183 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	30,168	42,293	51,394
Annual Litres	85,318	119,608	145,344
Cost per day at sea	192	257	325
Litres per day at sea	544	727	918
Litres per tonne landed	823	1,380	2,183

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £23,440 and after deducting depreciation and interest, vessels made on average a net profit of £1,898. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £49,673 (21% of total income) compared to the bottom quartile average operating loss of £4,863 (-4% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit/loss for the top and bottom quartiles and the segment average.

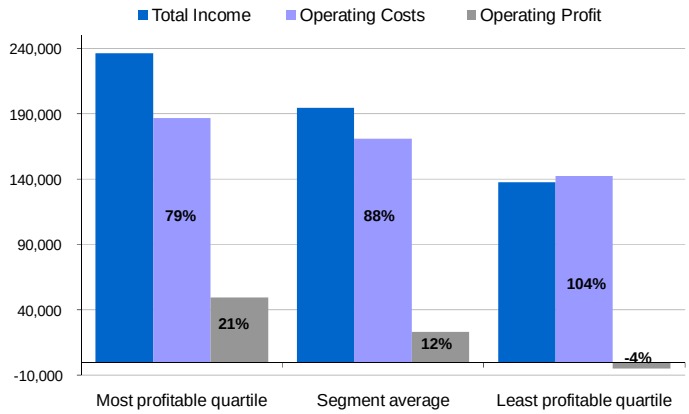

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	178,039	91%
Non-fishing Income	16,542	9%
Total Income	194,582	100%
Fuel costs	42,293	22%
Crew share	43,277	22%
Other Fishing Costs	28,098	14%
Total Fishing Costs	113,669	58%
Total Vessel Costs	57,473	30%
Total Operating Costs	171,142	88%
Operating Profit	23,440	12%
Depreciation	10,040	5%
Interest	4,995	3%
Other finance costs	6,507	3%
Net Profit	1,898	1%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.16 NSWoS demersal trawl 24m and over

- The segment comprised 46 vessels with an average length of 29m
- In total the segment landed 40,069 tonnes of seafood worth £58.3million in 2009
- On average, these vessels landed 871 tonnes, worth £1.3million
- Monkfish, haddock, saithe and cod were the key species for this segment
- On average vessels made an operating profit of £106,834 in 2009

2009	Segment Total	Average per vessel
Active Vessels	46	-
Length (m)	-	29
Power (kW)	40,286	876
Registered Tonnage (GT)	16,437	357
VCU	28,625	622
Landings (Tonnes)	40,069	871
Fishing Income (£)	58,314,281	1,267,702
Days at Sea	10,574	230
Vessel Age	-	16
Crew	406	9

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Trawlers in the North Sea and West of Scotland 24m and over segment are based mainly in the north east of Scotland and the northern isles, fishing from Peterhead, Fraserburgh, Kirkwall and Lerwick. This newly defined segment now includes both single rig and twin rig vessels.

Vessels in this segment spent on average 230 days at sea in 2009 targeting mostly monkfish, saithe and haddock. On average vessels had 9 crew members and the segment employed 406 fishermen in total.

Income

The segment landed 40,069 tonnes of seafood worth £58.3million in 2009. Therefore on average, active vessels landed 871 tonnes, worth £1.3million.

Monkfish was the most important species to this segment in terms of value. Saithe accounted for 26% of the volume of landings but only 13% of value. The segment's average price for monkfish was slightly more the UK fleet average price for monkfish, see Figure 3.7

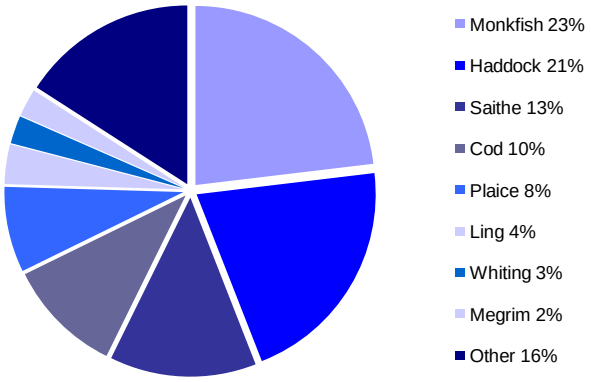

Figure 1. Value catch composition (Source: MMO, Seafish)

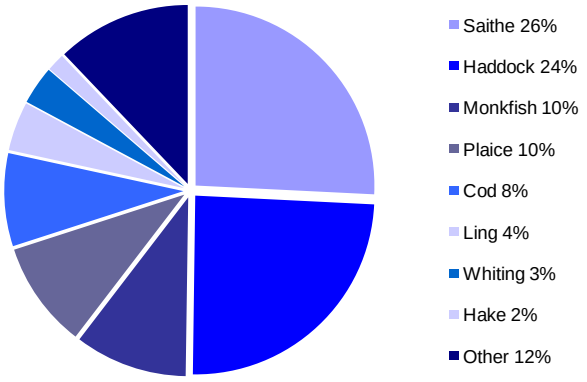

Figure 2. Volume catch composition (Source: MMO, Seafish)

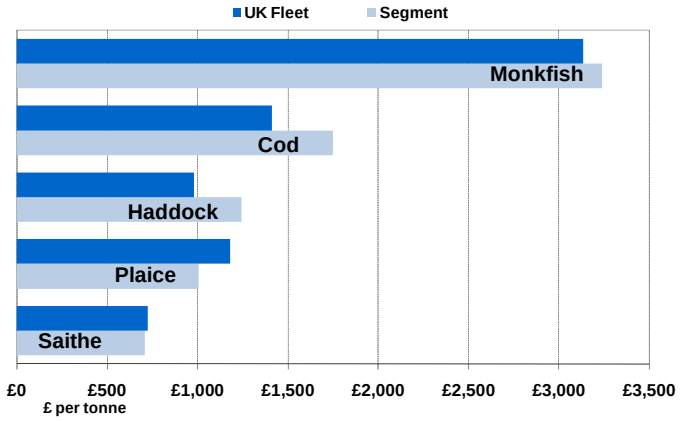

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 3.63 tonnes per day, obtained £1,556 per tonne and therefore earned £5,287 per day at sea. There was some variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 5.10 compared to a segment average of 3.63 and 2.12 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	1,631,729	1,267,702	691,424
Tonnes / day	5.10	3.63	2.12
£ per tonne	1,406	1,556	1,684
£ per day	6,767	5,287	3,377
Days at Sea	229	230	198

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £1,188,546 or 92% of total income. There was a variation between quartiles, with total operating costs for the most profitable quartile equating to 85% of income compared to 105% in the least profitable quartile. Fuel and crew share were the largest fishing costs, on average accounting for 27% and 25% of total operating costs respectively.

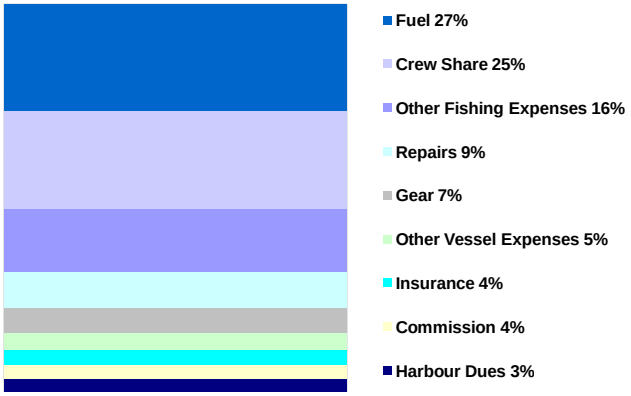

Figure 4. Operating cost breakdown (Source: Seafish)

Fuel

On average, vessels consumed 3,951 litres per day at sea costing £1,397 per day. Fuel consumption per day ranged from an average of 3,850 litres for vessels in the bottom quartile to an average of 3,715 litres for vessel in the top quartile.

On average, vessels consumed 1,287 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 779 litres and 2,004 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	315,422	326,555	268,449
Annual Litres	892,030	923,515	759,188
Cost per day at sea	1,314	1,397	1,361
Litres per day at sea	3,715	3,951	3,850
Litres per tonne landed	779	1,287	2,004

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £106,834 and after deducting depreciation and interest, vessels made on average a net loss of £13,550. There was a small range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £242,417 (15% of total income) compared to the bottom quartile average operating loss of £32,072 (-5% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit/loss for the top and bottom quartiles and the segment average.

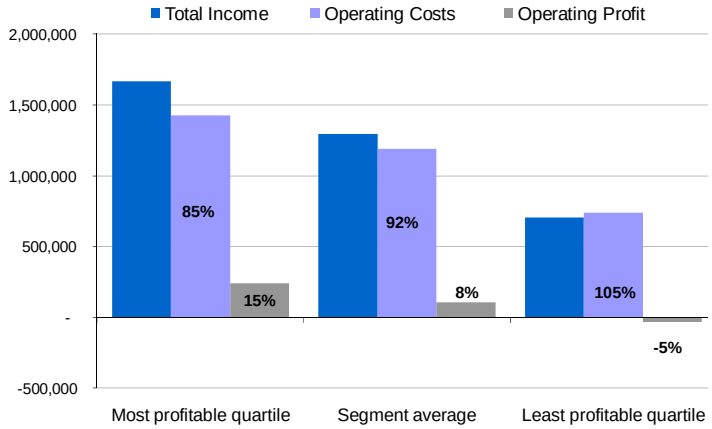

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	1,267,702	98%
Non-fishing Income	27,678	2%
Total Income	1,295,380	100%
Fuel costs	326,555	25%
Crew share	299,067	23%
Other Fishing Costs	276,478	21%
Total Fishing Costs	902,101	70%
Total Vessel Costs	286,445	22%
Total Operating Costs	1,188,546	92%
Operating Profit	106,834	8%
Depreciation	89,428	7%
Interest	30,956	2%
Other finance costs		0%
Net Profit	-13,550	-1%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.17 NSWoS demersal pair trawl / seine

- The segment comprised 41 vessels with an average length of 24m
- In total the segment landed 23,020 tonnes of seafood worth £30million in 2009
- On average, these vessels landed 561 tonnes, worth £657,719
- Haddock and cod were the key species for this segment
- On average vessels made an operating profit of £57,839 in 2009

2009	Segment Total	Average per vessel
Active Vessels	41	-
Length (m)	-	24
Power (kW)	19,919	486
Registered Tonnage (GT)	7,930	193
VCU	16,029	391
Landings (Tonnes)	23,020	561
Fishing Income (£)	26,966,484	657,719
Days at Sea	7,644	186
Vessel Age	-	22
Crew	236	6

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

North Sea and West of Scotland demersal pair vessels use a mix of pair trawl and pair seine, and are based mostly at ports on the east coast of the UK including Peterhead, Fraserburgh, Scarborough and Whitby. There was little change in the membership of this segment from 2008 to 2009.

Vessels in this segment spent on average 186 days at sea in 2009 targeting mostly haddock and cod. On average vessels had 6 crew members and the segment employed 236 fishermen in total.

Income

The segment landed 23,020 tonnes of seafood worth £30million in 2009. Therefore on average, active vessels landed 561 tonnes, worth £657,719.

Haddock was the most important species to this segment in terms of both value and volume. Saithe accounted for 16% of the volume of landings but just 9% of value. The segment's average price for haddock was marginally above the UK fleet average price for haddock, see Figure 3.

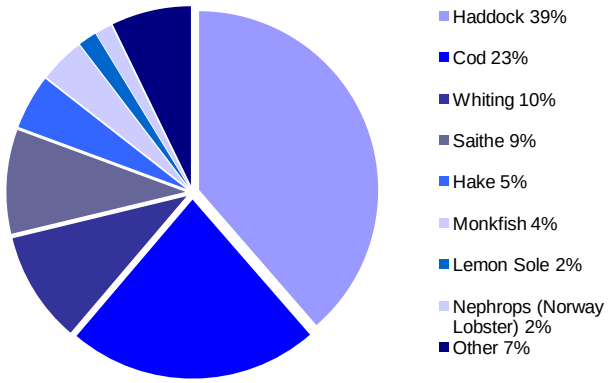

Figure 1. Value catch composition (Source: MMO, Seafish)

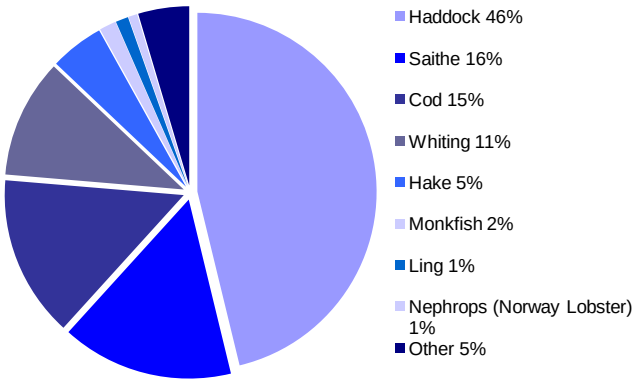

Figure 2. Volume catch composition (Source: MMO, Seafish)

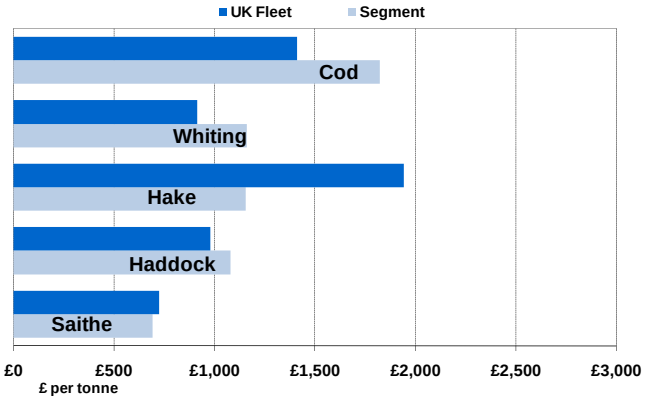

Figure 3. Average prices of key species (Source: MMO, Seafish)

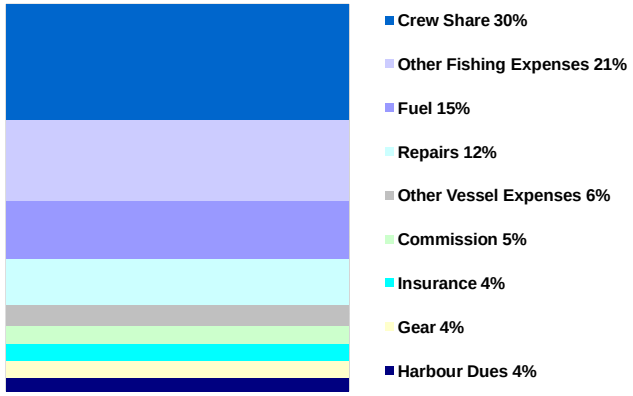

Figure 4. Operating cost breakdown (Source: Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 3.00 tonnes per day, obtained £1,173 per tonne and therefore earned £3,447 per day at sea. There was little variation in prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 3.60 compared to a segment average of 3.00 and 2.34 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	941,474	657,719	489,118
Tonnes per day	3.60	3.00	2.34
£ per tonne	1,262	1,173	1,160
£ per day	4,497	3,447	2,624
Days at Sea	210	186	180

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £631,155 or 92% of total income. There was a little variation between quartiles, with total operating costs for the most profitable quartile equating to 88% of income compared to 96% in the least profitable quartile. Crew share and other costs were the largest fishing costs, on average accounting for 30% and 21% of total operating costs respectively.

Fuel

On average, vessels consumed 1,417 litres per day at sea costing £501 per day. Fuel consumption per day ranged from an average of 1,447 litres for vessels in the bottom quartile to an average of 1,290 litres for vessel in the top quartile.

On average, vessels consumed 550 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 363 litres and 758 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	96,543	93,992	93,638
Annual Litres	273,030	265,813	264,813
Cost per day at sea	456	501	512
Litres per day at sea	1,290	1,417	1,447
Litres per tonne landed	363	550	758

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £57,839 and after deducting depreciation and interest, vessels made on average a net profit of £5,506. There was a small range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £120,790 (12% of total income) compared to the bottom quartile average operating profit of £19,272 (4% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

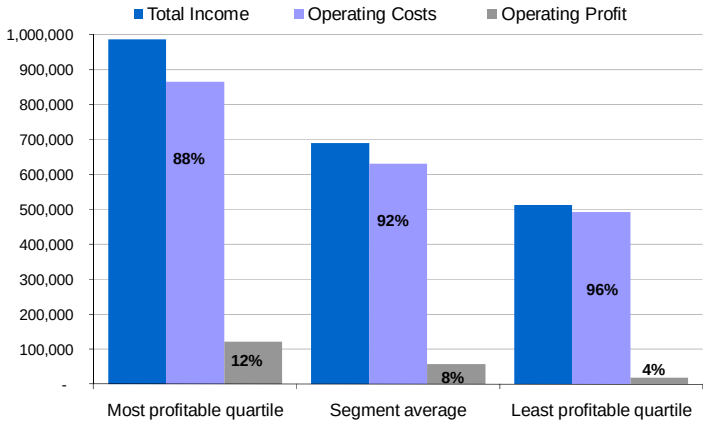

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	657,719	95%
Non-fishing Income	31,275	5%
Total Income	688,994	100%
Fuel costs	93,992	14%
Crew share	188,864	27%
Other Fishing Costs	182,250	26%
Total Fishing Costs	465,106	68%
Total Vessel Costs	166,049	24%
Total Operating Costs	631,155	92%
Operating Profit	57,839	8%
Depreciation	38,170	6%
Interest	11,904	2%
Other finance costs	2,260	0%
Net Profit	5,506	1%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.18 NSWoS demersal seiners

- The segment comprised 23 vessels with an average length of 23m
- In total the segment landed 12,051 tonnes of seafood worth £14million in 2009
- On average, these vessels landed 524 tonnes, worth £605,447
- Haddock, cod, whiting and plaice were the key species for this segment
- On average vessels made an operating profit of £99,756 in 2009

2009	Segment Total	Average per vessel
Active Vessels	23	-
Length (m)	-	23
Power (kW)	11,349	493
Registered Tonnage (GT)	4,463	194
VCU	8,765	381
Landings (Tonnes)	12,051	524
Fishing Income (£)	13,925,290	605,447
Days at Sea	3,676	160
Vessel Age	-	24
Crew	142	6

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

North Sea and West of Scotland demersal seiners are mostly based in the ports of Fraserburgh and Peterhead.

Vessels in this segment spent on average 160 days at sea in 2009 targeting mostly haddock and cod. On average vessels had 6 crew members and the segment employed 142 fishermen in total.

Income

The segment landed 12,051 tonnes of seafood worth £14million in 2009. Therefore on average, active vessels landed 524 tonnes, worth £605,447.

Haddock was the most important species to this segment in terms of both value and volume. Cod accounted for only 10% of the volume of landings but 15% of value. The segment's average price for haddock was marginally less than the UK fleet average price for haddock, see Figure 3.

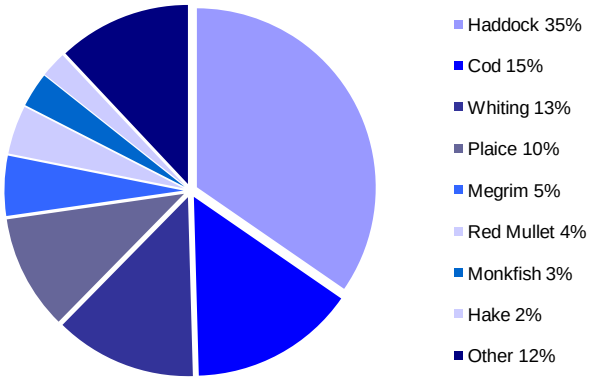

Figure 1. Value catch composition (Source: MMO, Seafish)

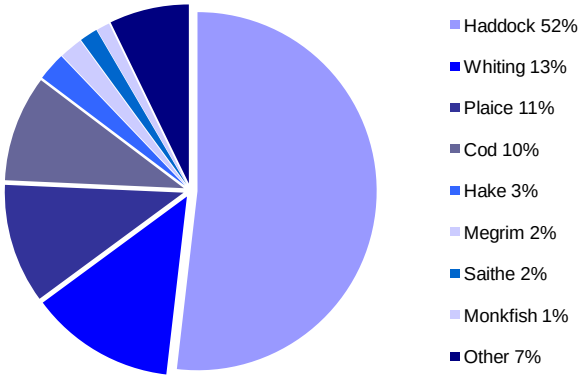

Figure 2. Volume catch composition (Source: MMO, Seafish)

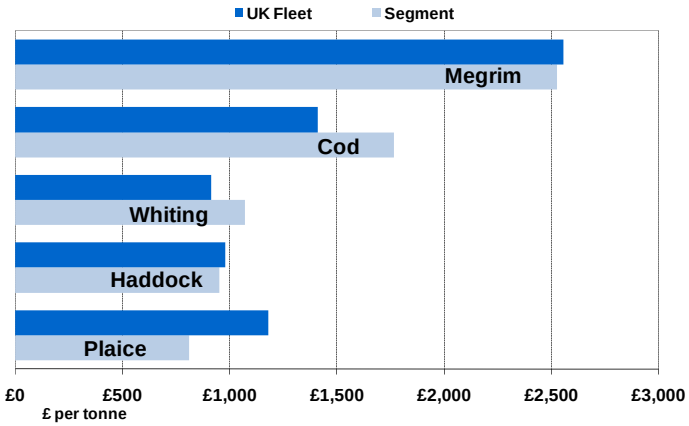

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 3.16 tonnes per day, obtained £1,212 per tonne and therefore earned £3,619 per day at sea. There was a lot of variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 3.24 compared to a segment average of 3.16 and 2.29 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	892,948	605,447	359,738
Tonnes /day	3.24	3.16	2.29
£ per tonne	1,505	1,212	1,152
£ per day	4,805	3,619	2,481
Days at Sea	179	160	137

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £566,256 or 85% of total income. There was a slight variation between quartiles, with total operating costs for the most profitable quartile equating to 82% of income compared to 90% in the least profitable quartile. Crew share and other costs and were the largest fishing costs, on average accounting for 30% and 23% of total operating costs respectively.

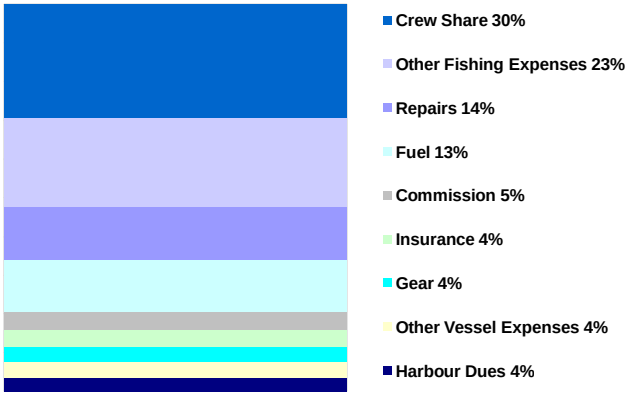

Figure 4. Operating cost breakdown (Source: Seafish)

Fuel

On average, vessels consumed 1,311 litres per day at sea costing £464 per day. Fuel consumption per day ranged from an average of 1,283 litres for vessels in the bottom quartile to an average of 1,183 litres for vessel in the top quartile.

On average, vessels consumed 465 litres of fuel per tonne of seafood landed. This varied slightly between most and least profitable quartiles at 367 litres and 600 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	78,629	76,393	65,852
Annual Litres	222,367	216,043	186,233
Cost per day at sea	418	464	454
Litres per day at sea	1,183	1,311	1,283
Litres per tonne landed	367	465	600

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £99,756 and after deducting depreciation and interest, vessels made on average a net profit of £3,616. There was a small range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £181,166 (18% of total income) compared to the bottom quartile average operating profit of £38,810 (10% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

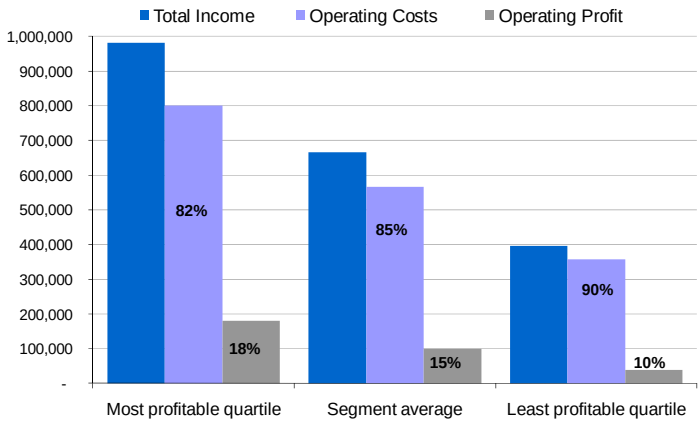

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	605,447	91%
Non-fishing Income	60,564	9%
Total Income	666,012	100%
Fuel costs	76,393	11%
Crew share	167,059	25%
Other Fishing Costs	176,491	26%
Total Fishing Costs	419,943	63%
Total Vessel Costs	146,313	22%
Total Operating Costs	566,256	85%
Operating Profit	99,756	15%
Depreciation	50,247	8%
Interest	38,526	6%
Other finance costs	7,367	1%
Net Profit	3,616	1%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.19 NSWoS demersal trawl under 24m, 300kW and over

- The segment comprised 47 vessels with an average length of 21m
- In total the segment landed 16,610 tonnes of seafood worth £28.7million in 2009
- On average, these vessels landed 353 tonnes, worth £610,429
- Monkfish, cod, nephrops, megrim and haddock were the key species for this segment
- On average vessels made an operating profit of £74,544 in 2009

2009	Segment Total	Average per vessel
Active Vessels	47	-
Length (m)	-	21
Power (kW)	20,795	442
Registered Tonnage (GT)	7,595	162
VCU	17,318	368
Landings (Tonnes)	16,610	353
Fishing Income (£)	28,690,149	610,429
Days at Sea	8,945	190
Vessel Age	-	16
Crew	271	5

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

North Sea and West of Scotland demersal trawl under 24m, 300kW and over vessels are based in the main North Sea ports in England and Scotland including Grimsby, Scarborough, Peterhead, Fraserburgh and Lerwick. There were a lot more vessels active in this segment in 2009 than in 2008, several of which may previously have been included in the former segment for twin rig vessels.

Vessels in this segment spent on average 190 days at sea in 2009 targeting mostly monkfish. On average vessels had 5 crew members and the segment employed 271 fishermen in total.

Income

The segment landed 16,610 tonnes of seafood worth £28.7million in 2009. Therefore on average, active vessels landed 353 tonnes, worth £610,429.

Monkfish was the most important species to this segment in terms of value and accounted for 17% of the volume. Haddock accounted for 19% of the volume of landings but but only 11% of value. The segment's average price for monkfish was slightly better the UK fleet average price for monkfish, see Figure 3.

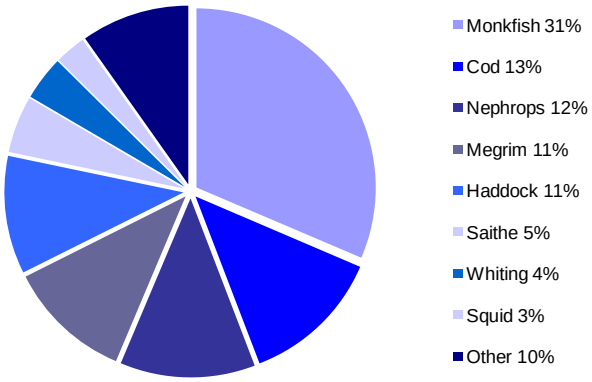

Figure 1. Value catch composition (Source: MMO, Seafish)

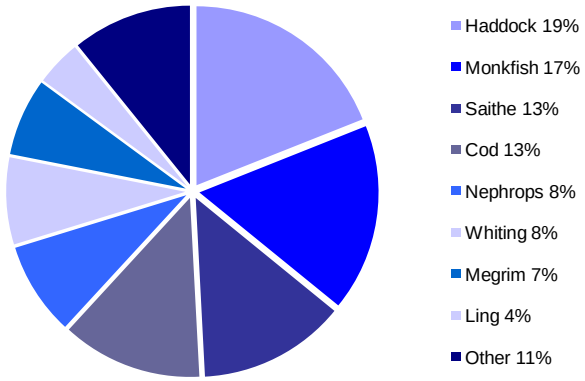

Figure 2. Volume catch composition (Source: MMO, Seafish)

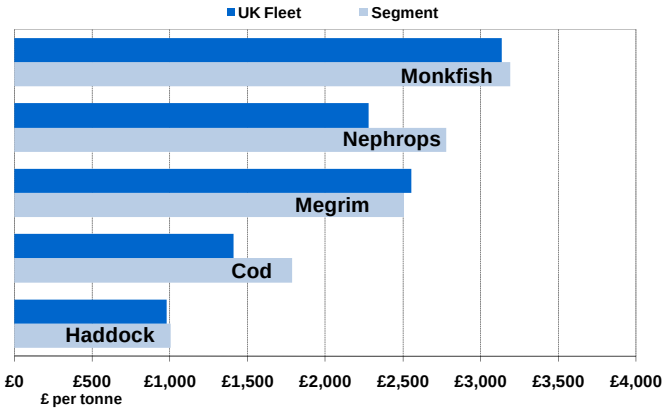

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 1.78 tonnes per day, obtained £1,772 per tonne and therefore earned £3,027 per day at sea. There was some variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 2.37 compared to a segment average of 1.78 and 1.47 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	977,442	610,429	388,261
Tonnes /day	2.37	1.78	1.47
£ per tonne	1,919	1,772	1,652
£ per day	4,108	3,027	2,390
Days at Sea	227	190	155

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £559,663 or 88% of total income. There was a substantial variation between quartiles, with total operating costs for the most profitable quartile equating to 81% of income compared to 98% in the least profitable quartile. Crew share and fuel were the largest fishing costs, accounting for 25% and 23% of total operating costs respectively.

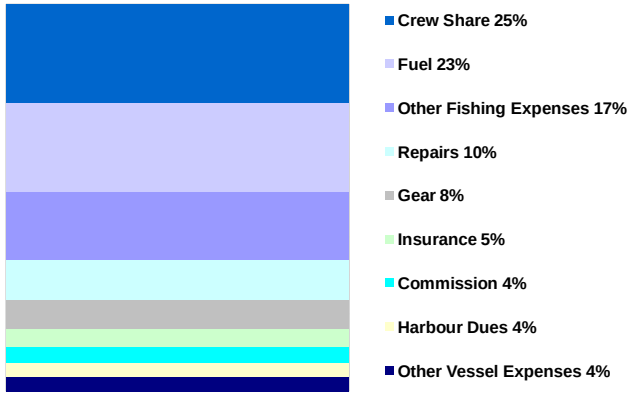

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 1,913 litres per day at sea costing £676 per day. Fuel consumption per day ranged from an average of 2,208 litres for vessels in the bottom quartile to an average of 1,640 litres for vessel in the top quartile.

On average, vessels consumed 1,181 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 760 litres and 1,565 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	139,272	129,849	123,428
Annual Litres	393,870	367,219	349,062
Cost per day at sea	580	676	781
Litres per day at sea	1,640	1,913	2,208
Litres per tonne landed	760	1,181	1,565

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £74,544 and after deducting depreciation and interest, vessels made on average a net profit of only £341. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £188,008 (19% of total income) compared to the bottom quartile average operating profit of £6,575 (2% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

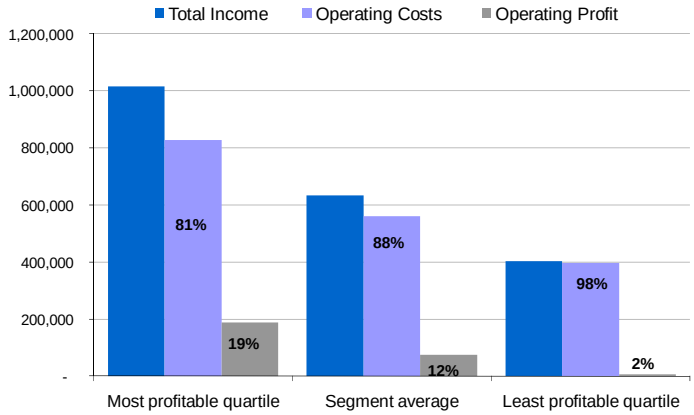

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	610,429	96%
Non-fishing Income	23,778	4%
Total Income	634,206	100%
Fuel costs	129,849	20%
Crew share	141,632	22%
Other Fishing Costs	141,051	22%
Total Fishing Costs	412,531	65%
Total Vessel Costs	147,131	23%
Total Operating Costs	559,663	88%
Operating Profit	74,544	12%
Depreciation	45,064	7%
Interest	17,885	3%
Other finance costs	11,254	2%
Net Profit	341	0%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.20 NSWoS demersal trawl under 24m under 300kW

- The segment comprised 34 vessels with an average length of 16m
- In total the segment landed 3,809 tonnes of seafood worth £5.8million in 2009
- On average, these vessels landed 112 tonnes, worth £171,661
- Nephrops, plaice, sole and megrim were the key species for this segment
- On average vessels made an operating profit of £17,671 in 2009

2009	Segment Total	Average per vessel
Active Vessels	34	-
Length (m)	-	16
Power (kW)	6,343	187
Registered Tonnage (GT)	1,628	48
VCU	6,009	177
Landings (Tonnes)	3,809	112
Fishing Income (£)	5,836,490	171,661
Days at Sea	4,354	128
Vessel Age	-	29
Crew	120	4

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

North Sea and West of Scotland demersal trawl under 24m, under 300kW vessels are based in the main North Sea ports in England and Scotland including Grimsby, Scarborough, Peterhead, Fraserburgh and Lerwick. There was not much change in membership of this segment in 2009 compared to 2008.

Vessels in this segment spent on average 128 days at sea in 2009 targeting a mix of white fish, scallops and nephrops. On average vessels had 4 crew members and the segment employed 120 fishermen in total.

Income

The segment landed 3,809 tonnes of seafood worth £5.8million in 2009. Therefore on average, active vessels landed 112 tonnes, worth £171,661.

Nephrops was the most important species to this segment in terms of value but only accounted for 10% of volume. The segment's average price for nephrops was slightly below the UK fleet average price for nephrops, see Figure 3.

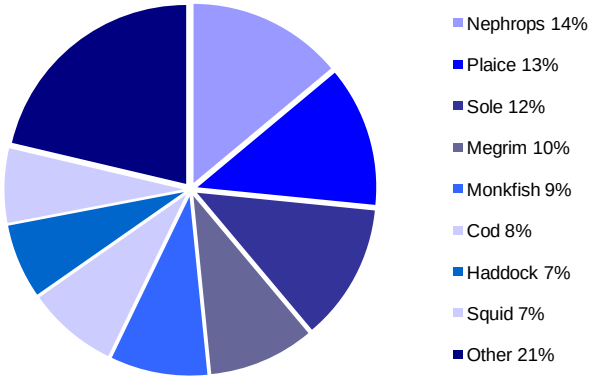

Figure 1. Value catch composition (Source: MMO, Seafish)

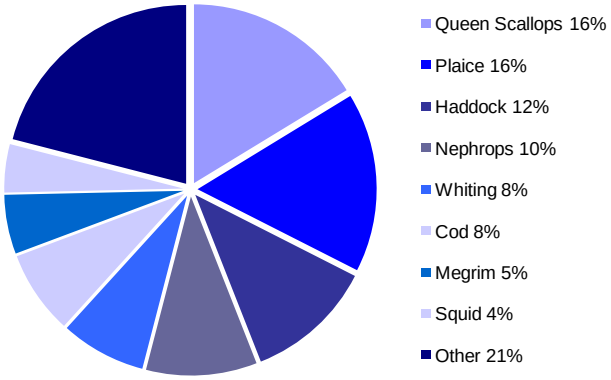

Figure 2. Volume catch composition (Source: MMO, Seafish)

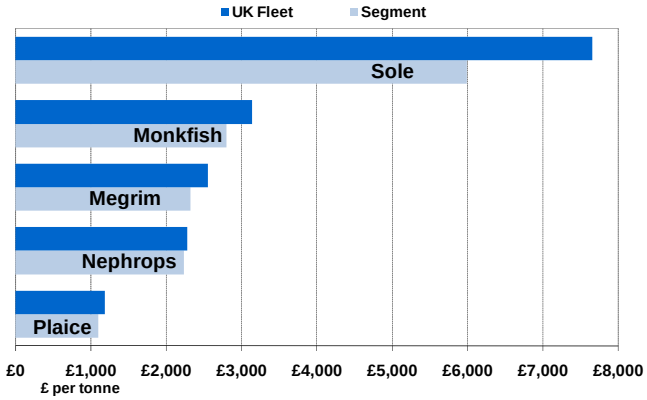

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.76 tonnes per day, obtained £2,346 per tonne and therefore earned £1,174 per day at sea. There was some variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 1.34 compared to a segment average of 0.76 and 0.32 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	394,963	171,661	37,796
Tonnes / day	1.34	0.76	0.32
£ per tonne	2,256	2,346	2,933
£ per day	2,265	1,174	463
Days at Sea	179	128	79

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £158,140 or 90% of total income. There was a significant variation between quartiles, with total operating costs for the most profitable quartile equating to 85% of income compared to 112% in the least profitable quartile. Crew share and fuel costs were the largest fishing costs, on average accounting for 32% and 18% of total operating costs respectively.

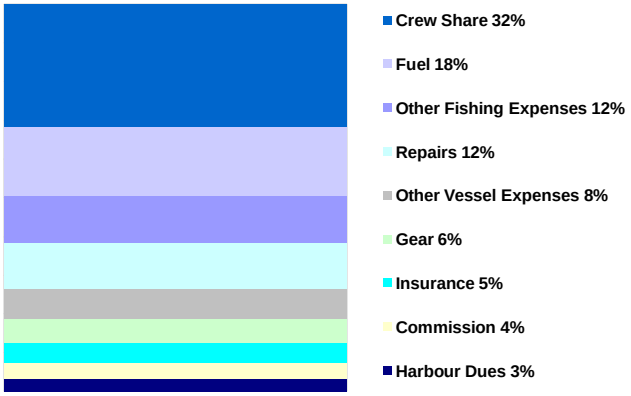

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 604 litres per day at sea costing £214 per day. Fuel consumption per day ranged from an average of 522 litres for vessels in the bottom quartile to an average of 714 litres for vessel in the top quartile.

On average, vessels consumed 966 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 760 litres and 1,584 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	44,696	28,529	14,655
Annual Litres	126,403	80,681	41,444
Cost per day at sea	253	214	185
Litres per day at sea	714	604	522
Litres per tonne landed	760	966	1,584

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £17,671 and after deducting depreciation and interest, vessels made on average a net profit of £8,096. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £61,602 (15% of total income) compared to the bottom quartile average operating loss of £4,483 (-12% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit/loss for the top and bottom quartiles and the segment average.

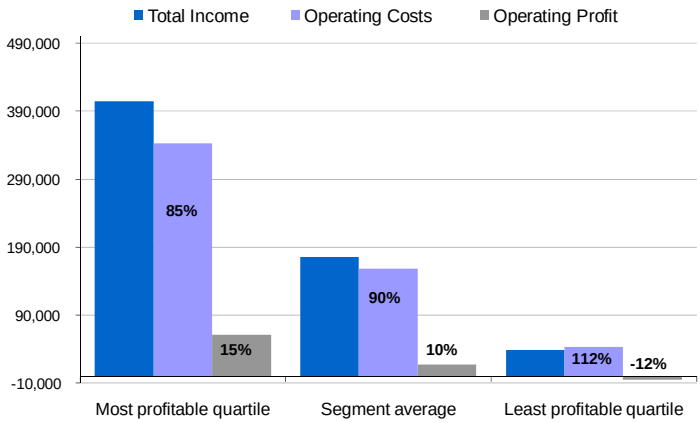

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	171,661	98%
Non-fishing Income	4,149	2%
Total Income	175,810	100%
Fuel costs	28,529	16%
Crew share	49,864	28%
Other Fishing Costs	30,590	17%
Total Fishing Costs	108,983	62%
Total Vessel Costs	49,156	28%
Total Operating Costs	158,140	90%
Operating Profit	17,671	10%
Depreciation	5,496	3%
Interest	4,078	2%
Other finance costs		0%
Net Profit	8,096	5%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.21 NSWoS scallop dredge

- The segment comprised 62 vessels with an average length of 16m
- In total the segment landed 9,507 tonnes of seafood worth £16.5million in 2009
- On average, these vessels landed 153 tonnes, worth £265,767
- Scallops were the key species for this segment
- On average vessels made an operating profit of £58,997 in 2009

2009	Segment Total	Average per vessel
Active Vessels	62	-
Length (m)	-	16
Power (kW)	15,796	255
Registered Tonnage (GT)	3,626	58
VCU	12,459	204
Landings (Tonnes)	9,507	153
Fishing Income (£)	16,477,577	265,767
Days at Sea	9,928	160
Vessel Age	-	30
Crew	226	4

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

North Sea and West of Scotland scallop dredge vessels are based at a number of ports throughout the UK. There was very little change in membership of this segment from 2008 to 2009.

Vessels in this segment spent on average 160 days at sea in 2009 targeting mostly scallops. On average vessels had 4 crew members and the segment employed 226 fishermen in total.

Income

The segment landed 9,507 tonnes of seafood worth £16.5million in 2009. Therefore on average, active vessels landed 153 tonnes, worth £265,767, lower than in 2008.

Scallops was the most important species to this segment in terms of both value and volume. The segment's average price for scallops was higher than the UK fleet average price for scallops, see Figure 3.

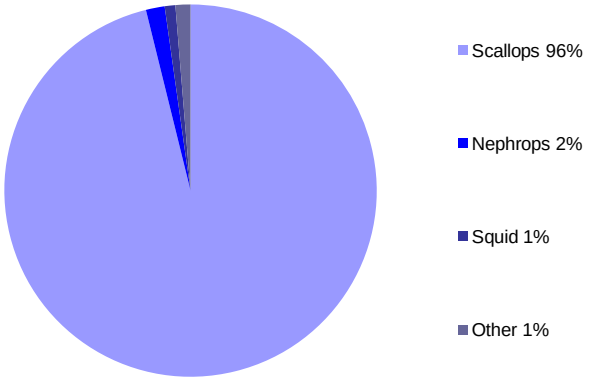

Figure 1. Value catch composition (Source: MMO, Seafish)

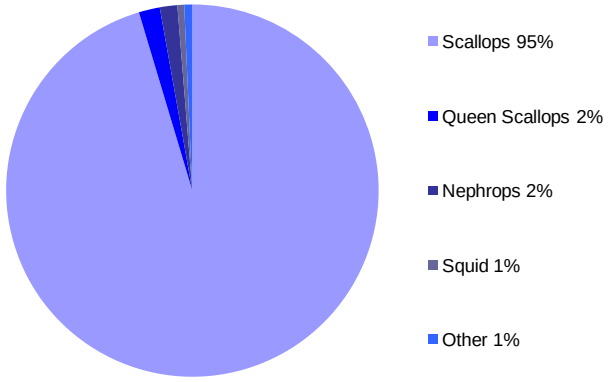

Figure 2. Volume catch composition (Source: MMO, Seafish)

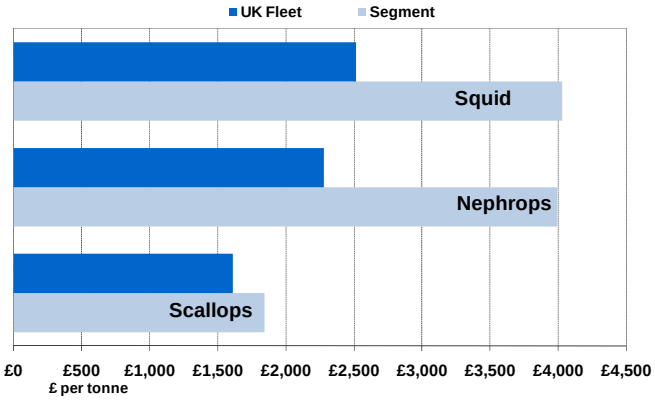

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.88 tonnes per day, obtained £1,847 per tonne and therefore earned £1,535 per day at sea. There was a large variation in prices per tonne achieved between quartiles and vessels in the top quartile landed fewer tonnes per day at 0.69 compared to a segment average of 0.88 and 0.65 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	242,916	265,767	172,696
Tonnes / day	0.69	0.88	0.65
£ per tonne	2,332	1,847	1,635
£ per day	1,506	1,535	1,037
Days at Sea	146	160	159

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £219,102 or 79% of total income. There was some variation between quartiles, with total operating costs for the most profitable quartile equating to 71% of income compared to 89% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 29% and 20% of total operating costs respectively.

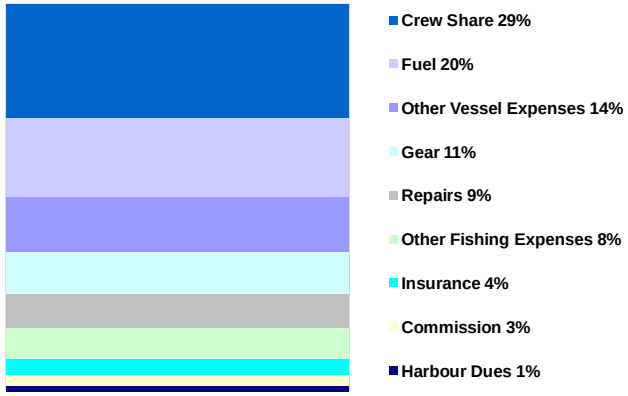

Figure 4. Operating cost breakdown (Source: Seafish)

Fuel

On average, vessels consumed 728 litres per day at sea costing £258 per day. Fuel consumption per day ranged from an average of 797 litres for vessels in the bottom quartile to an average of 364 litres for vessel in the top quartile.

On average, vessels consumed 910 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 554 litres and 1,317 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	21,693	44,373	46,628
Annual Litres	61,350	125,489	131,866
Cost per day at sea	129	258	282
Litres per day at sea	364	728	797
Litres per tonne landed	554	910	1,317

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £58,997 and after deducting depreciation and interest, vessels made on average a net profit of £40,893. There was a range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £72,789 (29% of total income) compared to the bottom quartile average operating profit of £20,542 (11% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

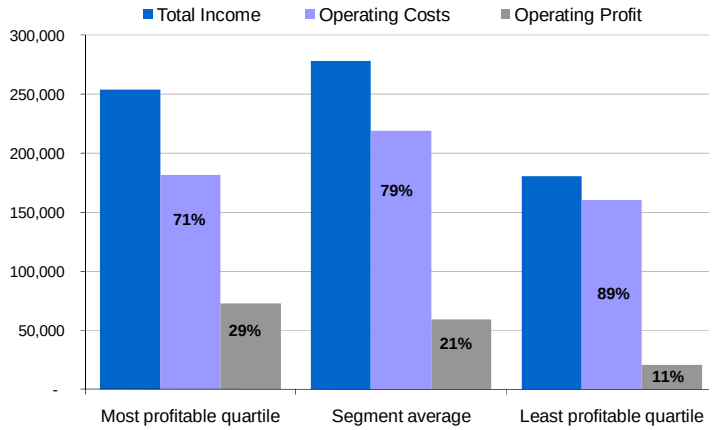

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	265,767	96%
Non-fishing Income	12,332	4%
Total Income	278,099	100%
Fuel costs	44,373	16%
Crew share	64,593	23%
Other Fishing Costs	26,816	10%
Total Fishing Costs	135,782	49%
Total Vessel Costs	83,320	30%
Total Operating Costs	219,102	79%
Operating Profit	58,997	21%
Depreciation	15,916	6%
Interest	1,500	1%
Other financial costs	688	0%
Net Profit	40,893	15%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.22 Pelagic 40m and over

- The segment comprised 28 vessels with an average length of 67m
- In total the segment landed 255,895 tonnes of seafood worth £176million in 2009
- On average, these vessels landed 9,139 tonnes, worth £6.3million
- Mackerel and herring were the key species for this segment

2009	Segment Total	Average per vessel
Active Vessels	28	-
Length (m)	-	67
Power (kW)	121,947	4,355
Registered Tonnage (GT)	48,516	1,733
VCU	80,975	2,892
Landings (Tonnes)	255,895	9,139
Fishing Income (£)	175,634,855	6,272,673
Days at Sea	1,603	57
Vessel Age	-	10
Crew	468	17

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Over 40m pelagic vessels are based in the north east of Scotland and the Shetland Isles, and operate from Peterhead, Fraserburgh and Lerwick. These vessels land in Scotland and also in Norway. There were slightly fewer vessels active in the segment in 2009 than in 2008.

Vessels in this segment spent on average 57 days at sea in 2009 targeting mostly mackerel and herring. This was a drop in activity levels compared to 2008. On average vessels had 17 crew members and the segment employed 468 fishermen in total.

Income

The segment landed 255,895 tonnes of seafood worth £176million in 2009. Therefore on average, active vessels landed 9,139 tonnes, worth £6.2 million. Average value of landings per vessel was substantially higher in 2009 than in 2008.

Mackerel was the most important species to this segment in terms of both value and volume. Mackerel accounted for 65% of the volume of landings but 84% of value. The segment's average price for mackerel was nearly identical to the UK fleet average price for mackerel, which would be expected as this segment landed the vast majority of UK landed mackerel, see Figure 3. Prices were higher on average during 2009 than in 2008.

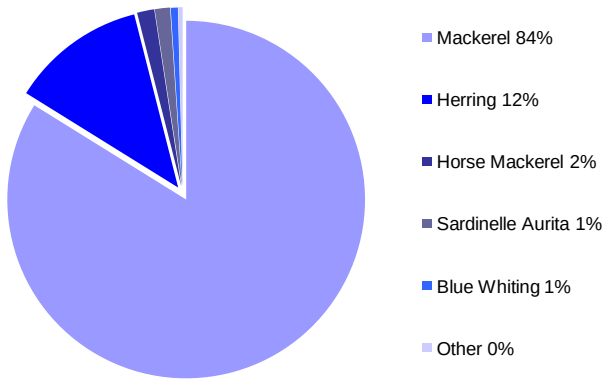

Figure 1. Value catch composition (Source: MMO, Seafish)

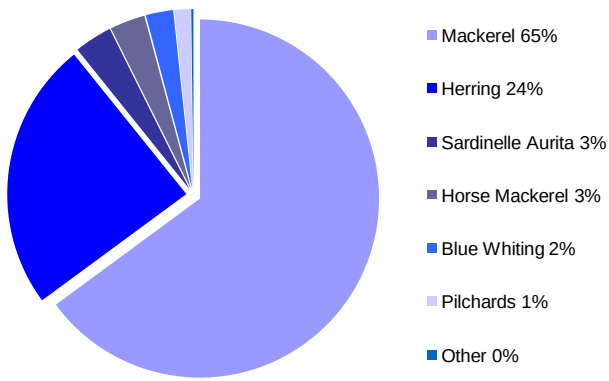

Figure 2. Volume catch composition (Source: MMO, Seafish)

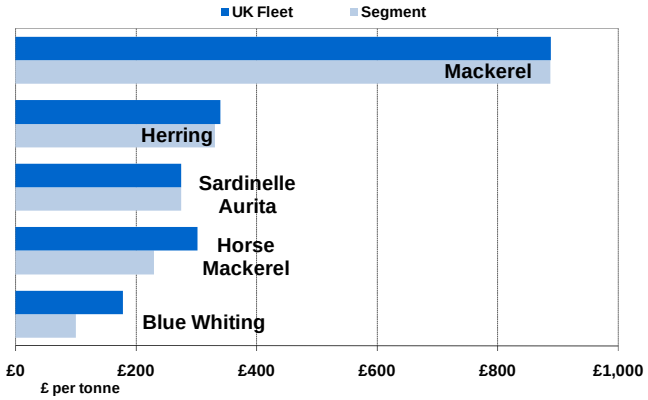

Figure 3. Average prices of key species (Source: MMO, Seafish)

Table 2 shows that on average vessels in this segment landed 190 tonnes per day, obtained £704 per tonne (all species) and therefore earned £139,340 per day at sea. There was a substantial increase in average catch volume per day at sea and average price per tonne, all species, from 2008 to 2009. Therefore, value of catch per day at sea was substantially higher in 2009 than in 2008.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)		6,272,673	
Tonnes / day		190	
£ per tonne		704	
£ per day		139,340	
Days at Sea		57	

Table 2. Landings per day at sea (Source: Seafish, MMO)

2.23 Pots and traps 10m - 12m

- The segment comprised 177 vessels with an average length of 11m
- In total the segment landed 8,080 tonnes of seafood worth £16.6million in 2009
- On average, these vessels landed 46 tonnes, worth £93,707
- Nephrops, lobster and crab were the key species for this segment
- On average vessels made an operating profit of £34,225 in 2009

2009	Segment Total	Average per vessel
Active Vessels	177	-
Length (m)	-	11
Power (kW)	22,824	129
Registered Tonnage (GT)	2,325	13
VCU	18,174	103
Landings (Tonnes)	8,080	46
Fishing Income (£)	16,586,075	93,707
Days at Sea	29,549	167
Vessel Age	-	25
Crew	513	3

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Vessels 10m – 12m using pots and traps are based at a number of ports throughout the UK.

Vessels in this segment spent on average 167 days at sea in 2009 targeting mostly nephrops, lobster and crab. On average vessels had 3 crew members and the segment employed 513 fishermen in total.

Income

The segment landed 8,080 tonnes of seafood worth £16.6million in 2009. Therefore on average, active vessels landed 46 tonnes, worth £93,707.

Nephrops was the most important species to this segment in terms of value although only accounted for 7% of volume of landings. Crabs accounted for 42% of the volume of landings and 24% of value. The segment's average price for nephrops was significantly greater than the UK fleet average price for nephrops, as would be expected, compared to the majority of nephrops which are trawl caught, see Figure 3.

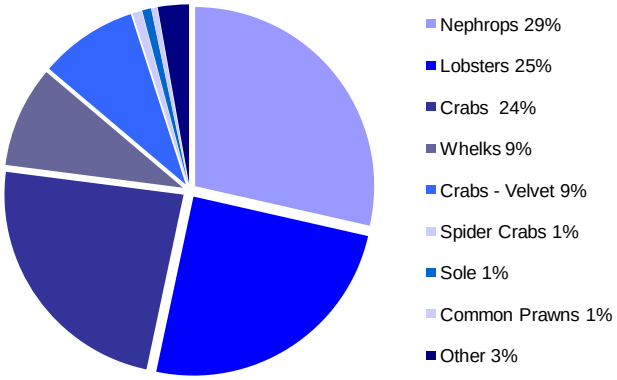

Figure 1. Value catch composition (Source: MMO, Seafish)

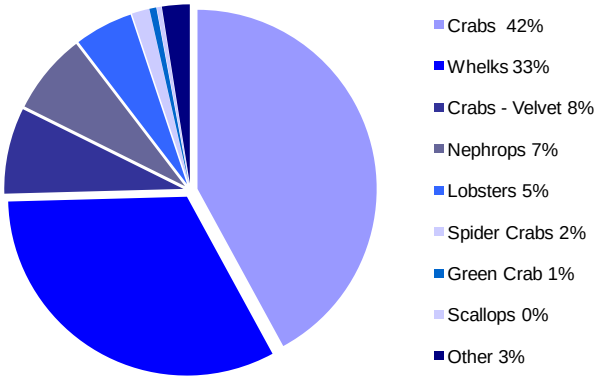

Figure 2. Volume catch composition (Source: MMO, Seafish)

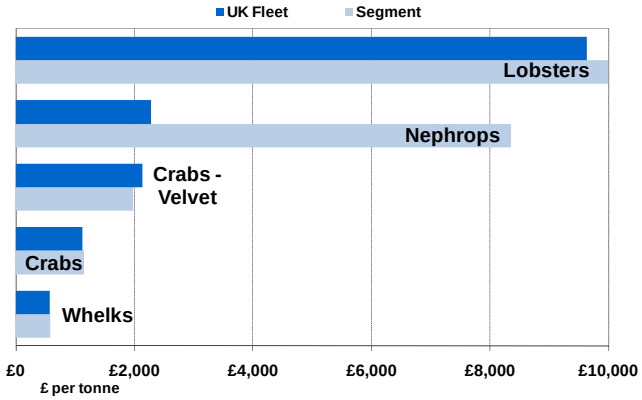

Figure 3. Average prices of key species (Source: MMO, Seafish)

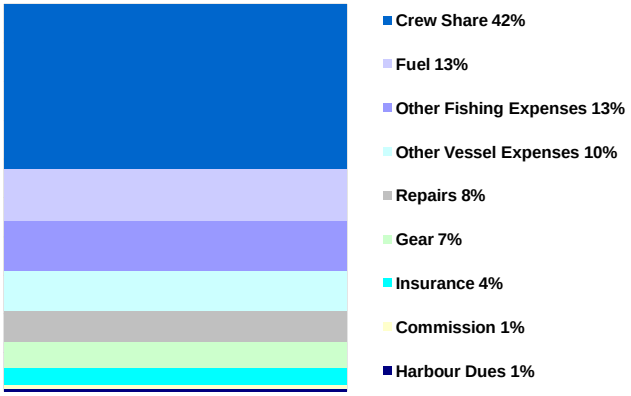

Figure 4. Operating cost breakdown (Source: Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.29 tonnes per day, obtained £3,735 per tonne and therefore earned £602 per day at sea. There was a variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 0.48 compared to a segment average of 0.29 and 0.17 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	136,417	93,706	55,544
Tonnes / day	0.48	0.29	0.17
£ per tonne	4,050	3,735	3,241
£ per day	1,085	602	308
Days at Sea	136	167	176

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £60,819 or 64% of total income. There was a variation between quartiles, with total operating costs for the most profitable quartile equating to 59% of income compared to 73% in the least profitable quartile. Crew share was the single largest fishing cost, on average accounting for 42% of total operating costs.

Fuel

On average, vessels consumed 136 litres per day at sea costing £48 per day. Fuel consumption per day ranged from an average of 155 litres for vessels in the bottom quartile to an average of 114 litres for vessel in the top quartile.

On average, vessels consumed 1,133 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 436 litres and 1,999 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	5,598	8,172	9,862
Annual Litres	15,830	23,110	27,892
Cost per day at sea	40	48	55
Litres per day at sea	114	136	155
Litres per tonne landed	436	1,133	1,999

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £34,225 and after deducting depreciation and interest, vessels made on average a net profit of £22,412. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £56,124 (41% of total income) compared to the bottom quartile average operating profit of £15,268 (27% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

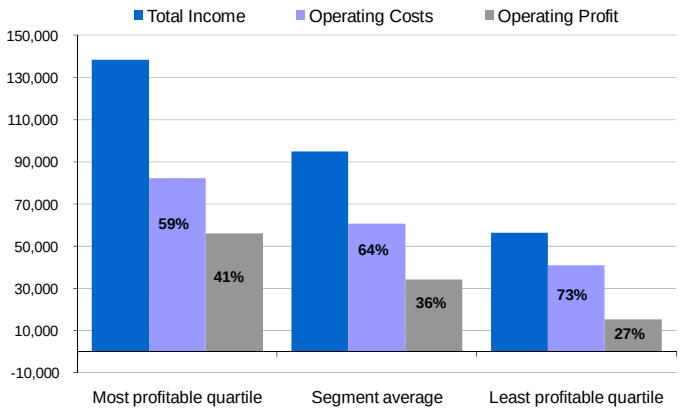

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	93,707	99%
Non-fishing Income	1,337	1%
Total Income	95,044	100%
Fuel costs	8,172	9%
Crew share	25,830	27%
Other Fishing Costs	8,922	9%
Total Fishing Costs	42,924	45%
Total Vessel Costs	17,895	19%
Total Operating Costs	60,819	64%
Operating Profit	34,225	36%
Depreciation	5,816	6%
Interest	1,907	2%
Other finance costs	4,090	4%
Net Profit	22,412	24%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.24 Pots and traps 12m and over

- The segment comprised 83 vessels with an average length of 15m
- In total the segment landed 16,112 tonnes of seafood worth £20.6million in 2009
- On average, these vessels landed 194 tonnes, worth £248,017
- Crabs and lobster were the key species for this segment
- On average vessels made an operating profit of £68,049 in 2009

2009	Segment Total	Average per vessel
Active Vessels	83	-
Length (m)	-	15
Power (kW)	25,114	303
Registered Tonnage (GT)	10,174	123
VCU	15,449	188
Landings (Tonnes)	16,112	194
Fishing Income (£)	20,585,383	248,017
Days at Sea	14,831	179
Vessel Age	-	25
Crew	376	5

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Vessels over 12m using pots and traps are based at a number of ports throughout the UK.

Vessels in this segment spent on average 179 days at sea in 2009 targeting mostly crabs and lobster. On average vessels had 5 crew members and the segment employed 376 fishermen in total.

Income

The segment landed 16,112 tonnes of seafood worth £20.6million in 2009. Therefore on average, active vessels landed 194 tonnes, worth £248,017.

Crab was the most important species to this segment in terms of both value and volume. Whelks accounted for 24% of the volume of landings but just 11% of value. The segment's average price for crabs was marginally more than the UK fleet average price for crabs, see Figure 3.

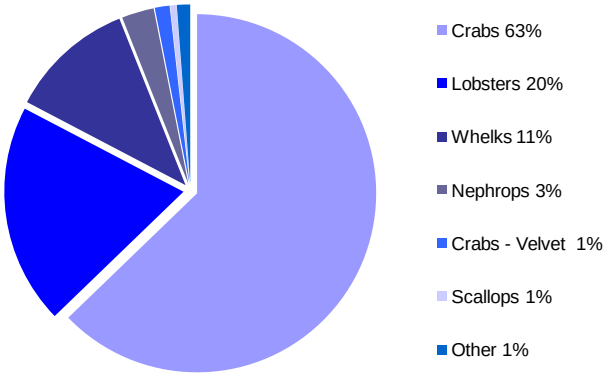

Figure 1. Value catch composition (Source: MMO, Seafish)

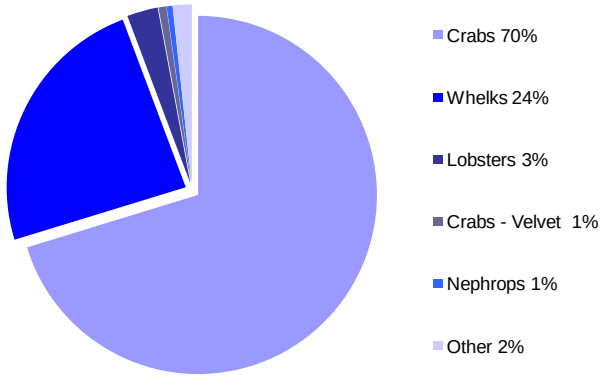

Figure 2. Volume catch composition (Source: MMO, Seafish)

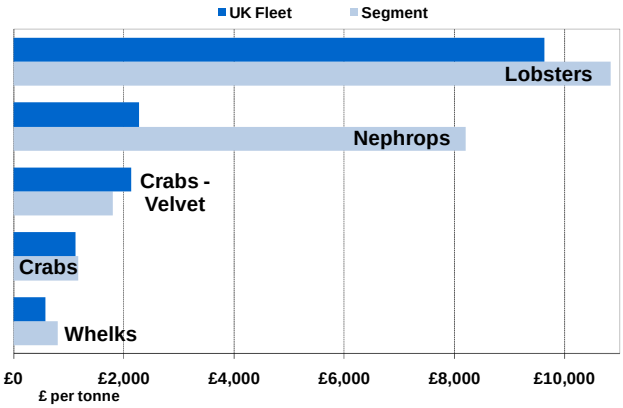

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.95 tonnes per day, obtained £1,790 per tonne and therefore earned £1,252 per day at sea. There was a variation between prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 1.74 compared to a segment average of 0.95 and 0.41 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	516,624	248,017	72,956
Tonnes / day	1.74	0.95	0.41
£ per tonne	1,435	1,790	2,287
£ per day	2,241	1,252	532
Days at Sea	224	179	135

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £222,009 or 77% of total income. There was a variation between quartiles, with total operating costs for the most profitable quartile equating to 72% of income compared to 96% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 35% and 18% of total operating costs respectively.

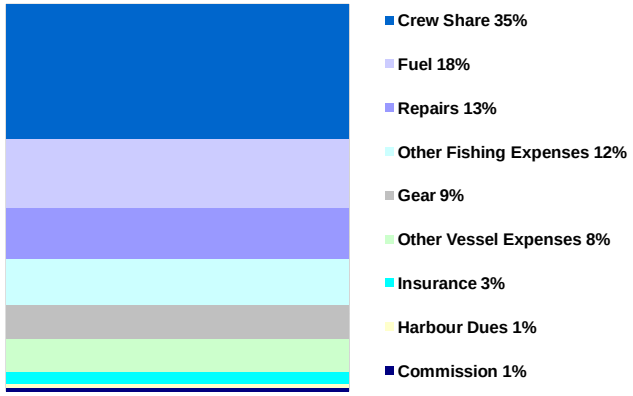

Figure 4. Operating cost breakdown (Source: Seafish)

Fuel

On average, vessels consumed 607 litres per day at sea costing £215 per day. Fuel consumption per day ranged from an average of 600 litres for vessels in the bottom quartile to an average of 638 litres for vessel in the top quartile.

On average, vessels consumed 1,274 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 427 litres and 2,823 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	53,143	39,577	28,654
Annual Litres	150,293	111,926	81,036
Cost per day at sea	225	215	212
Litres per day at sea	638	607	600
Litres per tonne landed	427	1,274	2,823

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £68,049 and after deducting depreciation and interest, vessels made on average a net profit of £54,901. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £171,044 (28% of total income) compared to the bottom quartile average operating profit of £3,005 (4% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

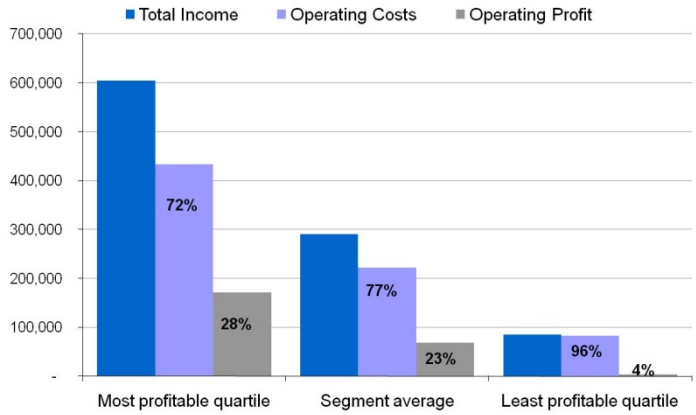

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	248,017	86%
Non-fishing Income	42,042	14%
Total Income	290,058	100%
Fuel costs	39,577	14%
Crew share	76,978	27%
Other Fishing Costs	31,403	11%
Total Fishing Costs	147,959	51%
Total Vessel Costs	74,051	26%
Total Operating Costs	222,009	77%
Operating Profit	68,049	23%
Depreciation	10,722	4%
Interest	2,425	1%
Other finance costs		0%
Net Profit	54,901	19%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.25 South West beam trawl under 250kW

- The segment comprised 21 vessels with an average length of 20m
- In total the segment landed 2,834 tonnes of seafood worth £7.7million in 2009
- On average, these vessels landed 135 tonnes, worth £366,066
- Sole was the key species for this segment
- On average vessels made an operating profit of £64,773 in 2009

2009	Segment Total	Average per vessel
Active Vessels	21	-
Length (m)	-	20
Power (kW)	4,421	211
Registered Tonnage (GT)	1,771	84
VCU	4,489	214
Landings (Tonnes)	2,834	135
Fishing Income (£)	7,687,379	366,066
Days at Sea	4,608	219
Vessel Age	-	21
Crew	96	5

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Vessels in the south west and English Channel beam trawl under 250kW segment are based at a number of ports on the south coast of England, including Brixham, Plymouth and Newlyn. The engine size threshold of this segment has been redefined (previously was 221kW) but that has had little impact on the membership of the segment between 2008 and 2009.

Vessels in this segment spent on average 219 days at sea in 2009 targeting mostly sole. On average vessels had 5 crew members and the segment employed 96 fishermen in total.

Income

The segment landed 2,834 tonnes of seafood worth £7.7million in 2009. Therefore on average, active vessels landed 135 tonnes, worth £366,066.

Sole was the most important species to this segment in terms of value. Plaice accounted for 17% of the volume of landings but just 9% of value. The segment's average price for sole was marginally greater than the UK fleet average price for sole, see Figure 3.

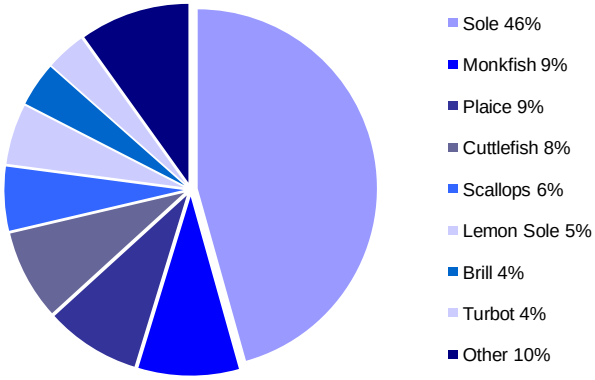

Figure 1. Value catch composition (Source: MMO, Seafish)

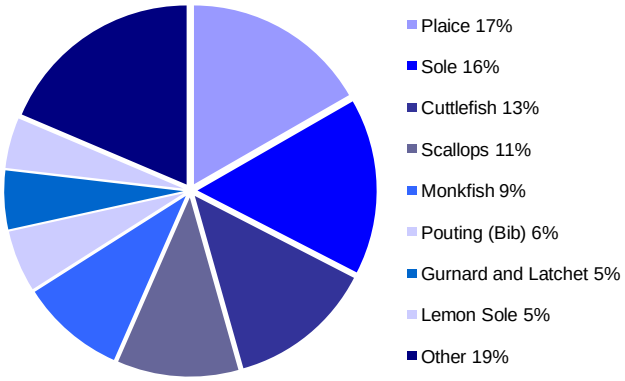

Figure 2. Volume catch composition (Source: MMO, Seafish)

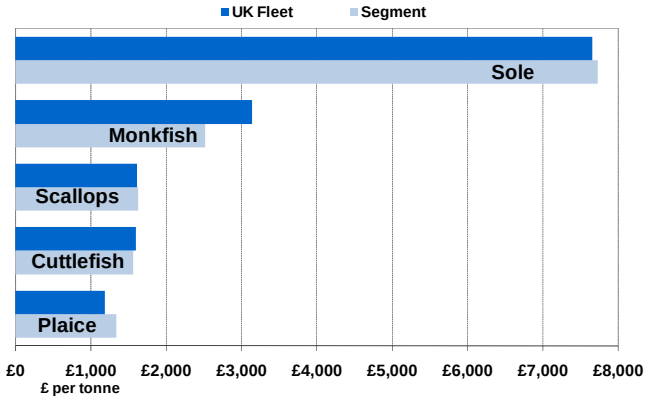

Figure 3. Average prices of key species (Source: MMO, Seafish)

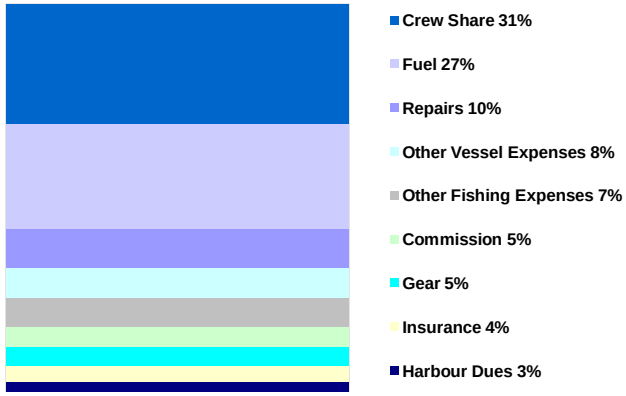

Figure 4. Operating costs breakdown (Source: Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.59 tonnes per day, obtained £2,799 per tonne and therefore earned £1,634 per day at sea. There was little variation in prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 0.75 compared to a segment average of 0.59 and 0.40 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	475,981	366,066	210,432
Tonnes / day	0.75	0.59	0.40
£ per tonne	2,610	2,799	2,740
£ per day	1,909	1,634	1,088
Days at Sea	244	219	191

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £301,979 or 82% of total income. There was little variation between quartiles, with total operating costs for the most profitable quartile equating to 79% of income compared to 87% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 31% and 27% of total operating costs respectively.

Fuel

On average, vessels consumed 1,033 litres per day at sea costing £365 per day. Fuel consumption per day ranged from an average of 829 litres for vessels in the bottom quartile to an average of 1,000 litres for vessel in the top quartile.

On average, vessels consumed 1,826 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 1,384 litres and 2,083 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	89,242	81,543	56,301
Annual Litres	252,380	230,607	159,221
Cost per day at sea	354	365	293
Litres per day at sea	1,000	1,033	829
Litres per tonne landed	1,384	1,826	2,083

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £64,773 and after deducting depreciation and interest, vessels made on average a net profit of £48,099. There was a range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £101,007 (21% of total income) compared to the bottom quartile average operating profit of £27,808 (13% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

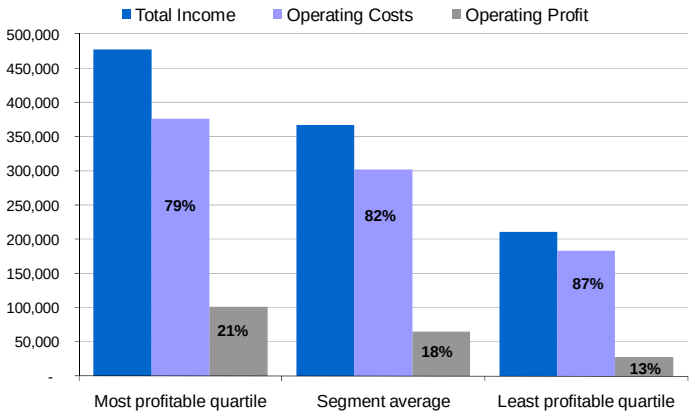

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	366,066	100%
Non-fishing Income	686	0%
Total Income	366,752	100%
Fuel costs	81,543	22%
Crew share	93,326	25%
Other Fishing Costs	46,132	13%
Total Fishing Costs	221,001	60%
Total Vessel Costs	80,978	22%
Total Operating Costs	301,979	82%
Operating Profit	64,773	18%
Depreciation	4,699	1%
Interest	9,286	3%
Other finance costs	2,689	1%
Net Profit	48,099	13%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.26 South West beam trawl 250kW and over

- The segment comprised 12 vessels with an average length of 27m
- In total the segment landed 3,245 tonnes of seafood worth £7.2million in 2009
- On average, these vessels landed 270 tonnes, worth £602,189
- Sole, monkfish and cuttlefish were the key species for this segment
- On average vessels made an operating profit of £70,075 in 2009

2009	Segment Total	Average per vessel
Active Vessels	12	-
Length (m)	-	27
Power (kW)	6,421	584
Registered Tonnage (GT)	1,711	156
VCU	4,729	473
Landings (Tonnes)	3,245	270
Fishing Income (£)	7,226,271	602,189
Days at Sea	2,699	225
Vessel Age	-	29
Crew	84	7

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Vessels in the south west and English Channel beam trawl 250kW and over segment are based at a number of ports on the south coast of England, including Brixham, Plymouth and Newlyn. The engine size threshold of this segment has been redefined (previously was 221kW). There were substantially fewer vessels active in this segment in 2009 than in 2008 although that is not due to the change in segment definition.

Vessels in this segment spent on average 225 days at sea in 2009 targeting mostly sole and monkfish. On average vessels had 7 crew members and the segment employed 84 fishermen in total.

Income

The segment landed 3,245 tonnes of seafood worth £7.2million in 2009. Therefore on average, active vessels landed 270 tonnes, worth £602,189.

Sole was the most important species to this segment in terms of value. Cuttlefish accounted for 21% of the volume of landings but just 16% of value. The segment's average price for sole was greater than the UK fleet average price for sole, see Figure 3.

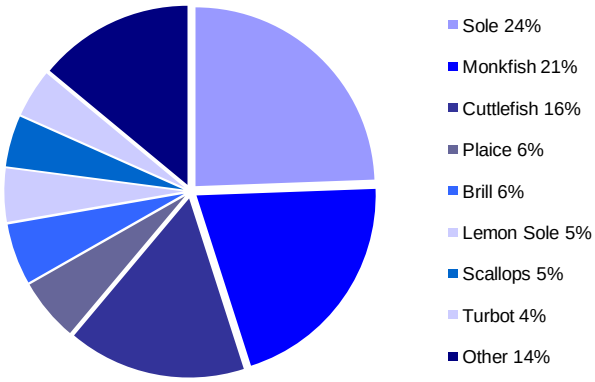

Figure 1. Value catch composition (Source: MMO, Seafish)

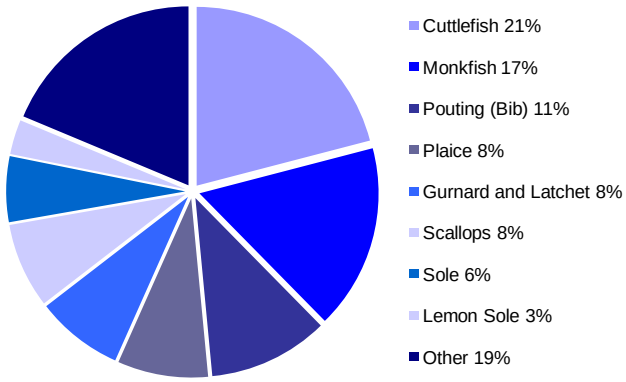

Figure 2. Volume catch composition (Source: MMO, Seafish)

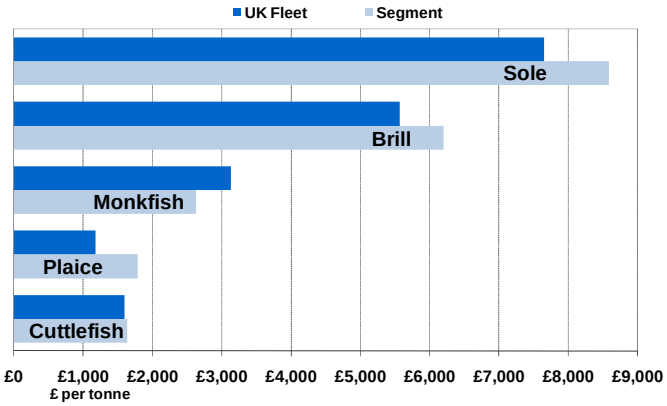

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 1.12 tonnes per day, obtained £2,319 per tonne and therefore earned £2,534 per day at sea. There was variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 1.51 compared to a segment average of 1.12 and 0.72 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	947,402	602,189	185,455
Tonnes / day	1.51	1.12	0.72
£ per tonne	2,233	2,319	2,588
£ per day	3,313	2,534	1,873
Days at Sea	286	225	99

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £532,114 or 88% of total income. There was a significant variation between quartiles, with total operating costs for the most profitable quartile equating to 83% of income compared to 101% in the least profitable quartile. Fuel and crew share were the largest fishing costs, on average accounting for 33% and 31% of total operating costs respectively.

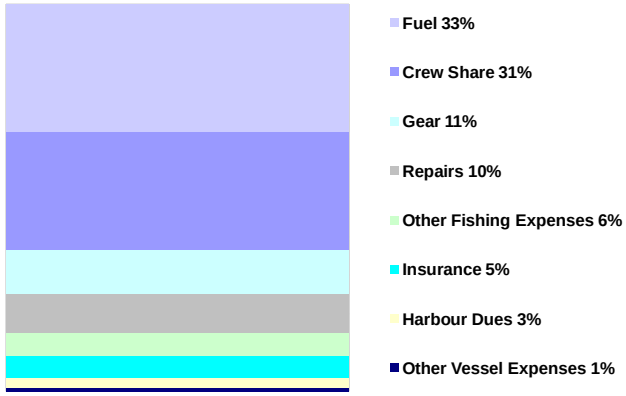

Figure 4. Operating cost breakdown (Source: Seafish)

Fuel

On average, vessels consumed 2,200 litres per day at sea costing £778 per day.

On average, vessels consumed 3,040 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 2,116 litres and 1,484 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	174,967	77,014	222,226
Annual Litres	494,817	217,800	628,467
Cost per day at sea	-	778	-
Litres per day at sea	-	2,200	-
Litres per tonne landed	2,116	3,040	1,484

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £70,075 and after deducting depreciation and interest, vessels made on average a net profit of £45,769. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £163,290 (17% of total income) compared to the bottom quartile average operating loss of £1,549 (-1% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit/loss for the top and bottom quartiles and the segment average.

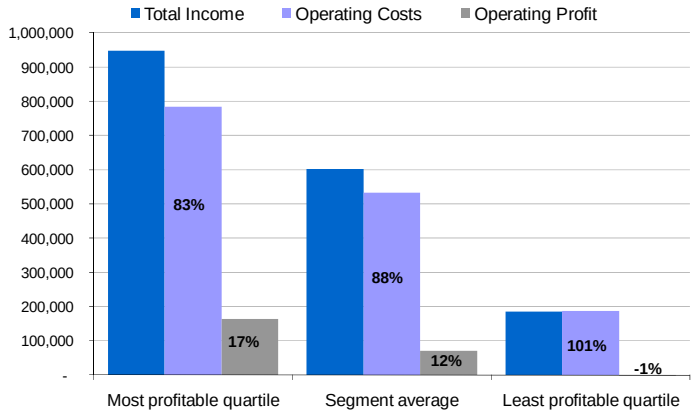

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	602,189	100%
Non-fishing Income		0%
Total Income	602,189	100%
Fuel costs	174,967	29%
Crew share	162,574	27%
Other Fishing Costs	47,605	8%
Total Fishing Costs	385,146	64%
Total Vessel Costs	146,968	24%
Total Operating Costs	532,114	88%
Operating Profit	70,075	12%
Depreciation	24,306	4%
Interest		0%
Other finance costs		0%
Net Profit	45,769	8%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.27 Under 10m demersal trawl / seine

- The segment comprised 216 vessels with an average length of 9.7m
- In total the segment landed 5,977 tonnes of seafood worth £12.4million in 2009
- On average, these vessels landed 28 tonnes, worth £57,275
- Nephrops was the key species for this segment
- On average vessels made an operating profit of £18,920 in 2009

2009	Segment Total	Average per vessel
Active Vessels	216	-
Length (m)	-	9.7
Power (kW)	24,374	114
Registered Tonnage (GT)	2,277	11
VCU	19,631	91
Landings (Tonnes)	5,977	28
Fishing Income (£)	12,371,487	57,275
Days at Sea	21,678	100
Vessel Age	-	17
Crew	648	3

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Vessels in the under 10m trawl and seine segment are based in ports throughout the UK. Many vessels which otherwise would have been in this segment are included in the low activity under 10m segment due to their low levels of days at sea or value of landings.

Vessels in this segment spent on average 100 days at sea in 2009 targeting mostly nephrops. On average vessels had 2 crew members and the segment employed 506 fishermen in total.

Income

The segment landed 5,977 tonnes of seafood worth £12.4million in 2009. Therefore on average, active vessels landed 28 tonnes, worth £57,275.

Nephrops was the most important species to this segment in terms of both value and volume. The segment's average price for nephrops was slightly more than the UK fleet average price for nephrops, see Figure 3.

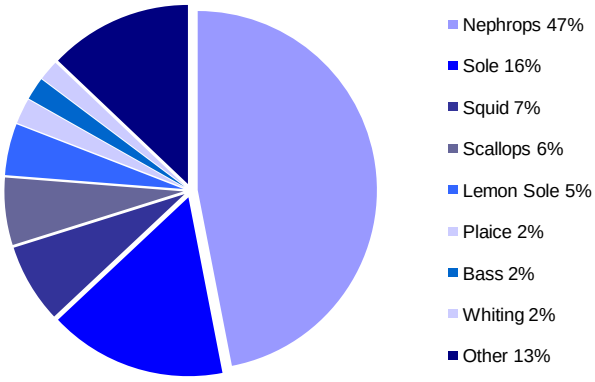

Figure 1. Value catch composition (Source: MMO, Seafish)

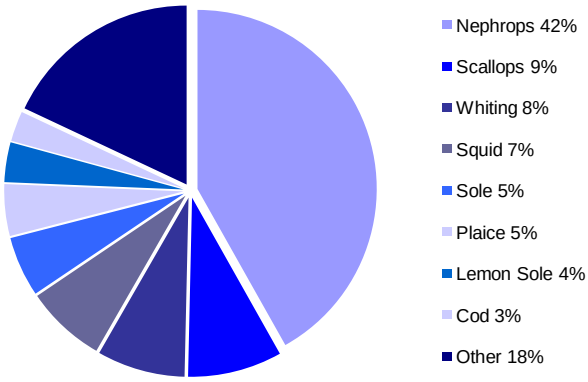

Figure 2. Volume catch composition (Source: MMO, Seafish)

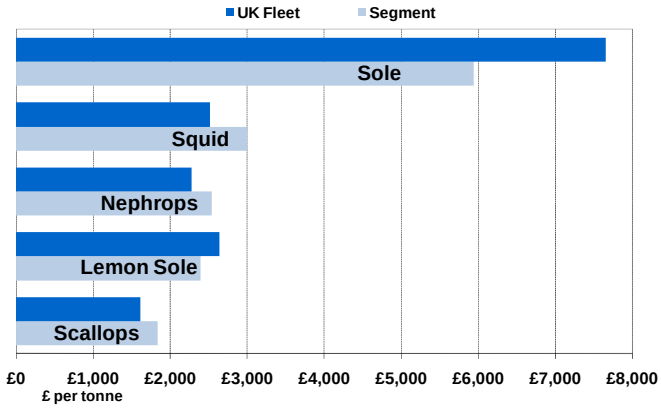

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.27 tonnes per day, obtained £2,466 per tonne and therefore earned £569 per day at sea. There was some variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 0.42 compared to a segment average of 0.27 and 0.16 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	106,164	57,275	28,241
Tonnes / day	0.42	0.27	0.16
£ per tonne	2,826	2,466	2,129
£ per day	1,041	569	281
Days at Sea	101	100	100

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £40,806 or 68% of total income. There was a variation between quartiles, with total operating costs for the most profitable quartile equating to 63% of income compared to 80% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 36% and 17% of total operating costs respectively.

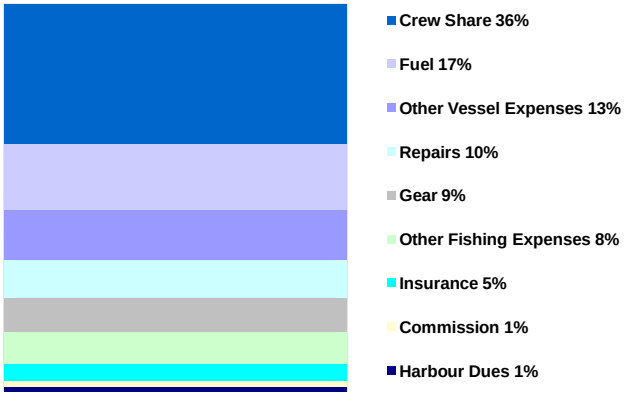

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 196 litres per day at sea costing £69 per day. Fuel consumption per day ranged from an average of 194 litres for vessels in the bottom quartile to an average of 202 litres for vessel in the top quartile.

On average, vessels consumed 997 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 546 litres and 1,519 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	7,307	7,012	6,891
Annual Litres	20,665	19,829	19,488
Cost per day at sea	71	69	69
Litres per day at sea	202	196	194
Litres per tonne landed	546	997	1,519

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £18,920 and after deducting depreciation and interest, vessels made on average a net profit of £9,464. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £40,758 (37% of total income) compared to the bottom quartile average operating profit of £5,895 (20% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

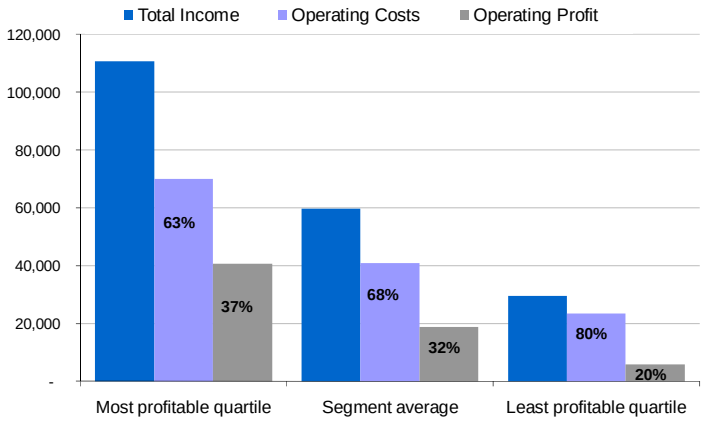

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	57,275	96%
Non-fishing Income	2,450	4%
Total Income	59,726	100%
Fuel costs	7,012	12%
Crew share	14,677	25%
Other Fishing Costs	4,427	7%
Total Fishing Costs	26,116	44%
Total Vessel Costs	14,691	25%
Total Operating Costs	40,806	68%
Operating Profit	18,920	32%
Depreciation	6,828	11%
Interest	2,267	4%
Other finance costs	360	1%
Net Profit	9,464	16%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.28 Under 10m drift and / or fixed nets

- The segment comprised 238 vessels with an average length of 8m
- In total the segment landed 5,188 tonnes of seafood worth £10.1million in 2009
- On average, these vessels landed 22 tonnes, worth £42,330
- Sole and bass were the key species for this segment
- On average vessels made an operating profit of £14,151in 2009

2009	Segment Total	Average per vessel
Active Vessels	238	-
Length (m)	-	8.0
Power (kW)	19,026	80
Registered Tonnage (GT)	1,242	5
VCU	15,489	65
Landings (Tonnes)	5,188	22
Fishing Income (£)	10,074,504	42,330
Days at Sea	22,387	94
Vessel Age	-	19
Crew	438	2

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Vessels in this newly defined segment use drift nets and fixed nets and are based in ports around the UK. Previously these vessels would have been included in the under 10m passive other gears segment.

Vessels in this segment spent on average 94 days at sea in 2009 targeting a broad mix of species. On average vessels had 2 crew members and the segment employed 438 fishermen in total.

Income

The segment landed 5,188 tonnes of seafood worth £10.1million in 2009. Therefore on average, active vessels landed 22 tonnes, worth £42,330.

Sole was the most important species to this segment in terms of value but only accounted for 10% of volume of landings. Pilchards accounted for 19% of the volume of landings and, along with a variety of other species accounted for 28% of value. The segment's average price for sole was slightly lower than the UK fleet average price for sole, see Figure 3.

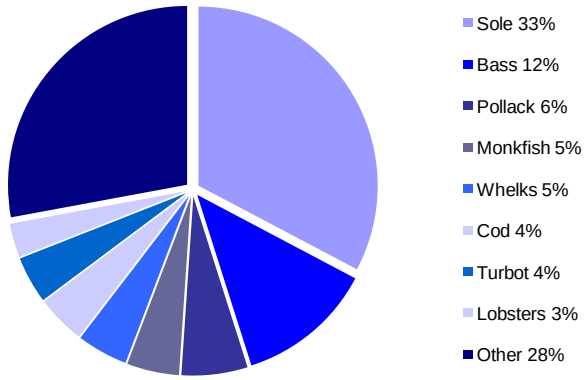

Figure 1. Value catch composition (Source: MMO, Seafish)

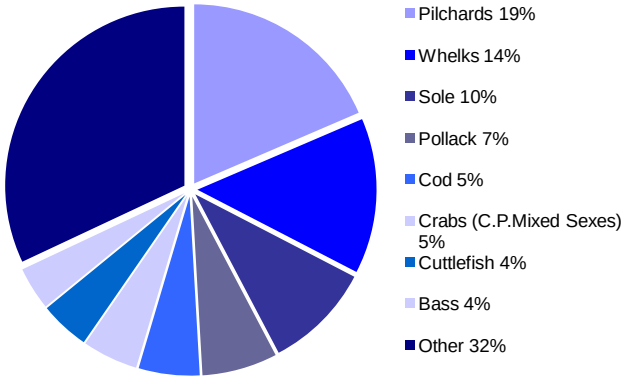

Figure 2. Volume catch composition (Source: MMO, Seafish)

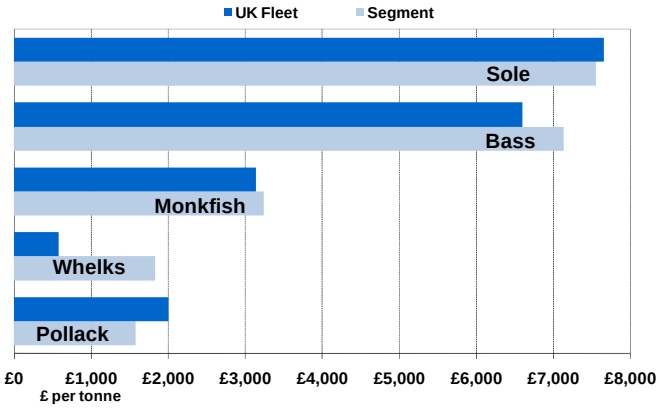

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.23 tonnes per day, obtained £3,070 per tonne and therefore earned £477 per day at sea. There was some variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 0.44 compared to a segment average of 0.23 and 0.13 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	54,829	42,330	32,102
Tonnes / day	0.44	0.23	0.13
£ per tonne	3,713	3,070	2,646
£ per day	859	477	253
Days at Sea	62	94	117

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £28,179 or 67% of total income. There was a slight variation between quartiles, with total operating costs for the most profitable quartile equating to 61% of income compared to 73% in the least profitable quartile. Crew share was the single largest fishing costs, on average accounting for 46% of total operating costs.

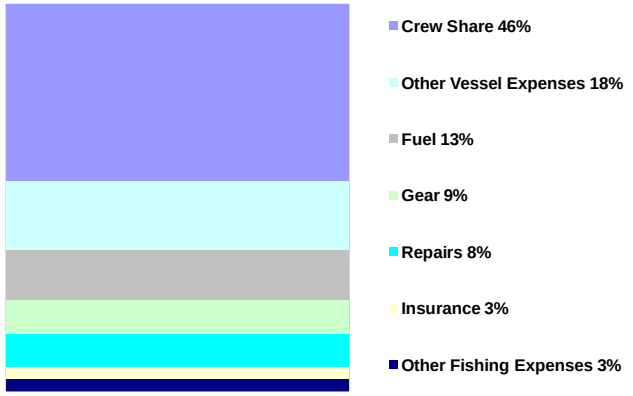

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 101 litres per day at sea costing £36 per day. Fuel consumption per day ranged from an average of 112 litres for vessels in the bottom quartile to an average of 81 litres for vessel in the top quartile.

On average, vessels consumed 785 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 407 litres and 1,216 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	1,886	3,622	4,858
Annual Litres	5,335	10,242	13,738
Cost per day at sea	29	36	40
Litres per day at sea	81	101	112
Litres per tonne landed	407	785	1,216

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £14,151 and after deducting depreciation and interest, vessels made on average a net profit of £10,764. There was a range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £21,134 (39% of total income) compared to the bottom quartile average operating profit of £8,620 (27% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

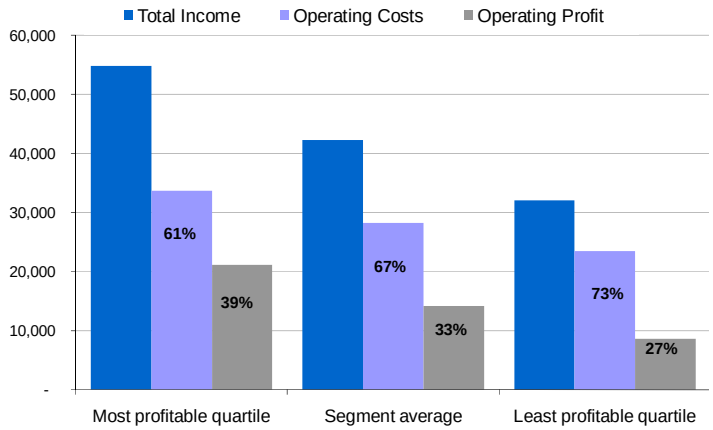

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	42,330	100%
Non-fishing Income		0%
Total Income	42,330	100%
Fuel costs	3,622	9%
Crew share	12,918	31%
Other Fishing Costs	857	2%
Total Fishing Costs	17,396	41%
Total Vessel Costs	10,783	25%
Total Operating Costs	28,179	67%
Operating Profit	14,151	33%
Depreciation	2,165	5%
Interest	768	2%
Other financial costs	454	1%
Net Profit	10,764	25%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.29 Under 10m mobile other gears

- The segment comprised 94 vessels with an average length of 8.4m
- In total the segment landed 2,463 tonnes of seafood worth £4.9million in 2009
- On average, these vessels landed 26 tonnes, worth £51,658
- Scallops and clams were the key species for this segment

2009	Segment Total	Average per vessel
Active Vessels	94	-
Length (m)	-	8.4
Power (kW)	7,521	80
Registered Tonnage (GT)	657	7
VCU	6,469	69
Landings (Tonnes)	2,463	26
Fishing Income (£)	4,855,809	51,658
Days at Sea	6,693	71
Vessel Age	-	16
Crew	180	2

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Vessels in the under 10m mobile other gears segment are based at ports throughout the UK. Due to their low number of days at sea or low value of landings in 2009, many vessels which otherwise would have been in this segment were reallocated to the low activity under 10m segment.

Vessels in this segment spent on average 71 days at sea in 2009 targeting mostly scallops and clams. On average vessels had 2 crew members and the segment employed 180 fishermen in total.

Income

The segment landed 2,463 tonnes of seafood worth £4.9million in 2009. Therefore on average, active vessels landed 26 tonnes, worth £51,658.

Scallops was the most important species to this segment in terms of both value and volume. The segment's average price for scallops was well above the UK fleet average price for scallops, see Figure 3.

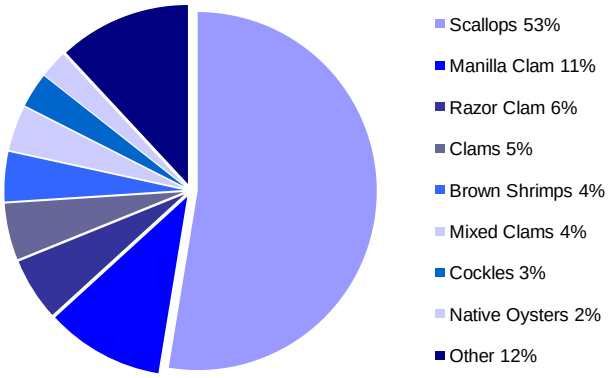

Figure 14. Value catch composition (Source: MMO, Seafish)

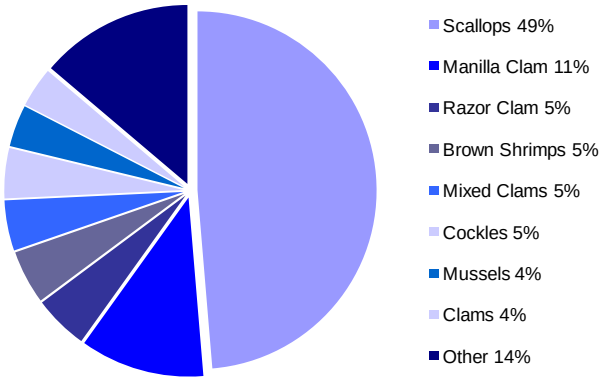

Figure 2. Volume catch composition (Source: MMO, Seafish)

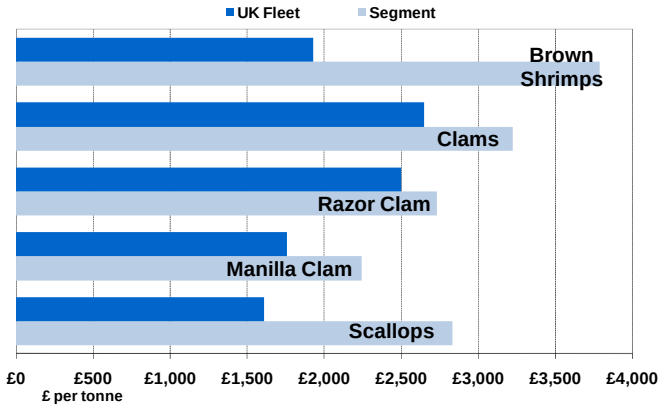

Figure 3. Average prices of key species (Source: MMO, Seafish)

Table 2 shows that on average vessels in this segment landed 0.69 tonnes per day, obtained £2,741 per tonne and therefore earned £1,038 per day at sea.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)		51,658	
Tonnes / day		0.69	
£ per tonne		2,741	
£ per day		1,038	
Days at Sea		71	

Table 2. Landings per day at sea (Source: Seafish, MMO)

2.30 Under 10m pots and traps

- The segment comprised 991 vessels with an average length of 8.1m
- In total the segment landed 18,836 tonnes of seafood worth £43.9million in 2009
- On average, these vessels landed 19 tonnes, worth £44,280
- Lobsters, nephrops and crabs were the key species for this segment
- On average vessels made an operating profit of £18,297 in 2009

2009	Segment Total	Average per vessel
Active Vessels	991	-
Length (m)	-	8.1
Power (kW)	76,289	77
Registered Tonnage (GT)	4,517	5
VCU	60,429	61
Landings (Tonnes)	18,836	19
Fishing Income (£)	43,881,250	44,280
Days at Sea	112,150	113
Vessel Age	-	19
Crew	1,635	2

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

Under 10m vessels using pots and traps are based at ports around the UK.

Vessels in this segment spent on average 113 days at sea in 2009 targeting mostly lobsters, nephrops and crabs. On average vessels had 2 crew members and the segment employed 1,635 fishermen in total.

Income

The segment landed 18,836 tonnes of seafood worth £43.9million in 2009. Therefore on average, active vessels landed 19 tonnes, worth £44,280.

Lobsters was the most important species to this segment in terms of value. Crabs accounted for 35% of the volume of landings and 17% of value. The segment's average price for lobsters was slightly more than the UK fleet average price for lobsters, see Figure 3. The average price for nephrops was substantially higher than average as much of the landings from pots and traps can be sold as live animals.

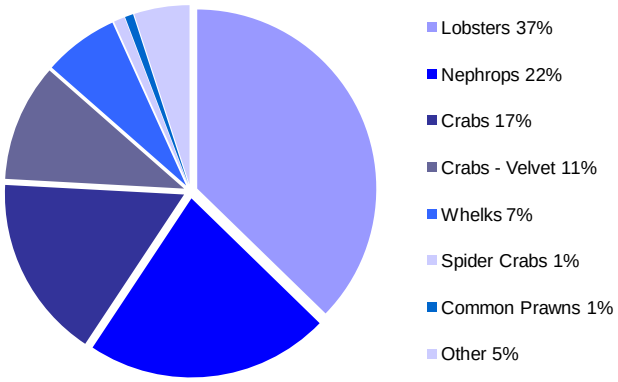

Figure 1. Value catch composition (Source: MMO, Seafish)

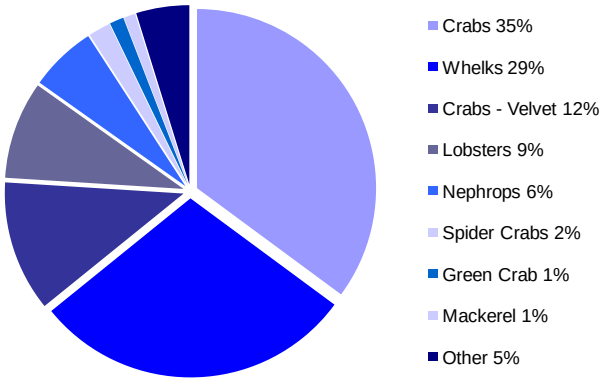

Figure 2. Volume catch composition (Source: MMO, Seafish)

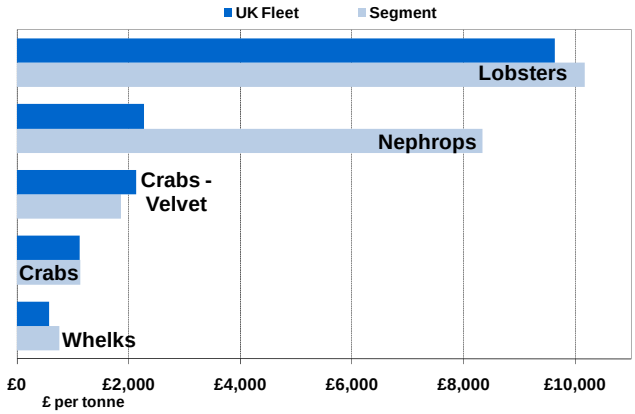

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.19 tonnes per day, obtained £4,362 per tonne and therefore earned £474 per day at sea. There was quite a variation in prices per tonne achieved between quartiles and vessels in the top quartile landed more tonnes per day at 0.36 compared to 0.09 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	58,838	44,280	26,447
Tonnes / day	0.36	0.19	0.09
£ per tonne	4,942	4,362	3,679
£ per day	1,029	474	180
Days at Sea	60	113	149

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £28,566 or 61% of total income. There was some variation between quartiles, with total operating costs for the most profitable quartile equating to 54% of income compared to 75% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 40% and 19% of total operating costs respectively.

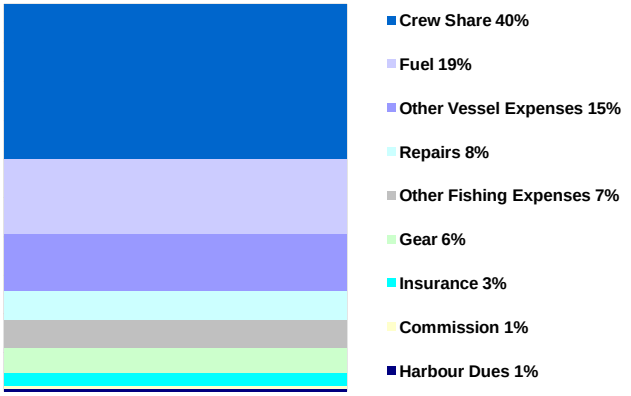

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 135 litres per day at sea costing £48 per day.

On average, vessels consumed 1,748 litres of fuel per tonne of seafood landed. This varied between most and least profitable quartiles at 60 litres and 149 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	2,859	5,528	7,138
Annual Litres	8,086	15,633	20,186
Cost per day at sea		48	
Litres per day at sea		135	
Litres per tonne landed	672	1,748	2,927

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £18,297 and after deducting depreciation and interest, vessels made on average a net profit of £12,946. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £28,799 (46% of total income) compared to the bottom quartile average operating profit of £7,092 (25% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

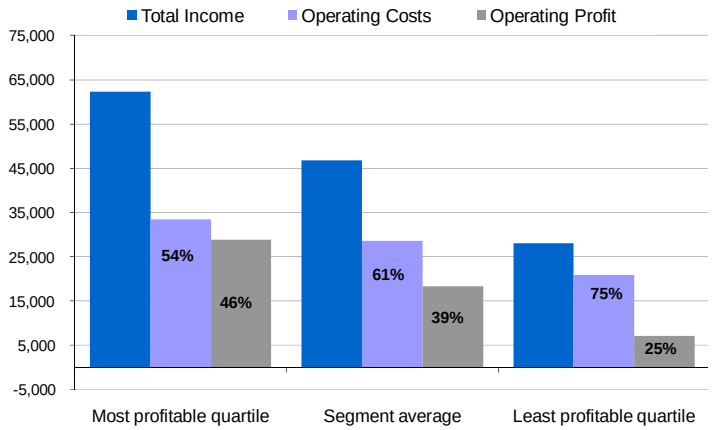

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	44,280	94%
Non-fishing Income	2,584	6%
Total Income	46,864	100%
Fuel costs	5,528	12%
Crew share	11,422	24%
Other Fishing Costs	2,533	5%
Total Fishing Costs	19,483	42%
Total Vessel Costs	9,084	19%
Total Operating Costs	28,566	61%
Operating Profit	18,297	39%
Depreciation	4,331	9%
Interest	835	2%
Other financial costs	186	0%
Net Profit	12,946	28%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.31 Under 10m using hooks

- The segment comprised 105 vessels with an average length of 7.1m
- In total the segment landed 1,320 tonnes of seafood worth £3.2million in 2009
- On average, these vessels landed 13 tonnes, worth £30,877
- Scallops, bass, razor clam and mackerel were the key species for this segment
- On average vessels made an operating profit of £14,191 in 2009

2009	Segment Total	Average per vessel
Active Vessels	105	-
Length (m)	-	7.1
Power (kW)	8,115	77
Registered Tonnage (GT)	325	3
VCU	5,916	56
Landings (Tonnes)	1,320	13
Fishing Income (£)	3,242,127	30,877
Days at Sea	7,830	75
Vessel Age	-	19
Crew	178	2

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

This is a newly defined segment for 2009. Vessels under 10m mainly using hooks are based at ports around the UK. The species landed reveal however that other gears are also used for some of the year, and this is confirmed in the official data set that is used for fleet segmentation.

Vessels in this segment spent on average 75 days at sea in 2009 targeting mostly scallops and mackerel. On average vessels had 2 crew members and the segment employed 178 fishermen in total.

Income

The segment landed 1,320 tonnes of seafood worth £3.2million in 2009. Therefore on average, active vessels landed 13 tonnes, worth £30,877.

Mackerel accounted for 31% of the volume of landings but just 13% of value. Scallops was the most important species to this segment in terms of value with bass in second place. The segment's average price for scallops was greater than the UK fleet average price for scallops, see Figure 3.

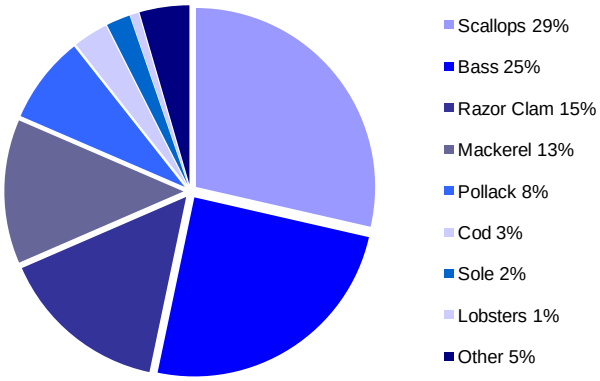

Figure 1. Value catch composition (Source: MMO, Seafish)

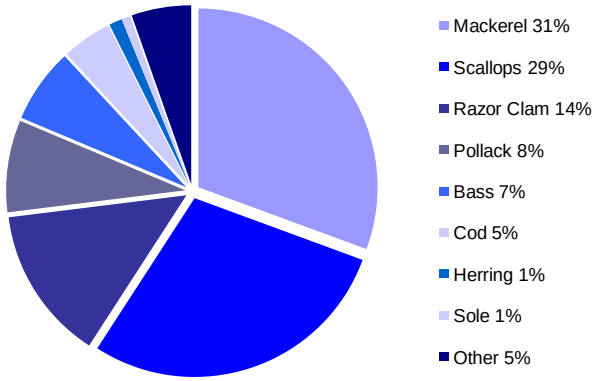

Figure 2. Volume catch composition (Source: MMO, Seafish)

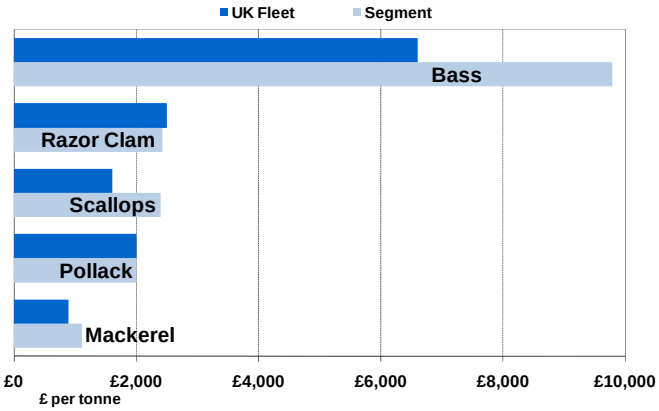

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.18 tonnes per day, obtained £3,341 per tonne and therefore earned £473 per day at sea. There was not much variation in prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 0.21 compared to a segment average of 0.18 and 0.14 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	35,697	30,877	24,953
Tonnes / day	0.21	0.18	0.14
£ per tonne	3,621	3,341	3,849
£ per day	532	473	379
Days at Sea	72	75	72

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £20,010 or 59% of total income. There was a significant variation between quartiles, with total operating costs for the most profitable quartile equating to 37% of income compared to 67% in the least profitable quartile. Crew share was the single largest fishing costs, on average accounting for 45% of total operating costs.

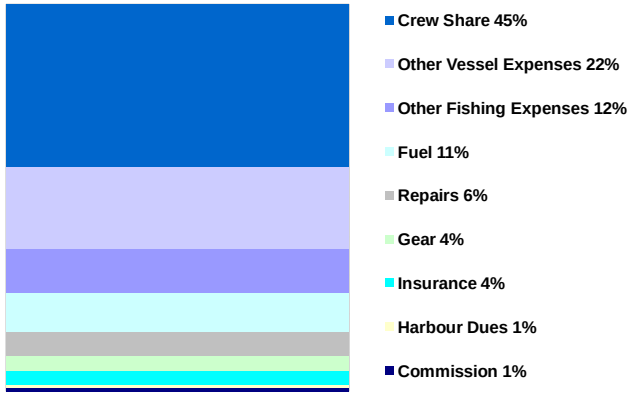

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 82 litres per day at sea costing £29 per day. Fuel consumption per day ranged from an average of 152 litres for vessels in the bottom quartile to an average of 8 litres for vessel in the top quartile.

On average, vessels consumed 698 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 45 litres and 1,671 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	413	2,084	3,540
Annual Litres	481	5,331	10,011
Cost per day at sea	3	29	54
Litres per day at sea	8	82	152
Litres per tonne landed	45	698	1,671

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £14,191 and after deducting depreciation and interest, vessels made on average a net profit of £10,734. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £24,969 (63% of total income) compared to the bottom quartile average operating profit of £9,231 (33% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

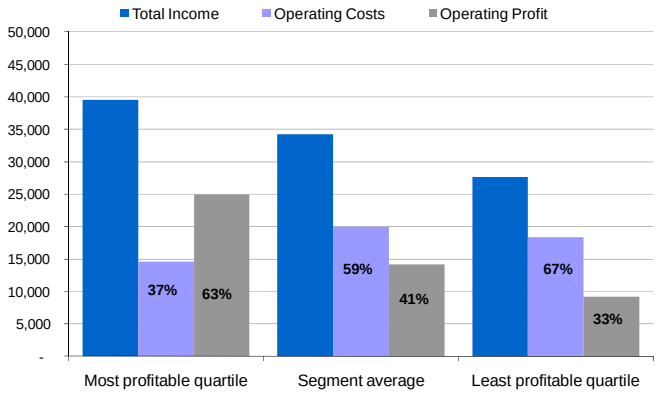

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	30,877	90%
Non-fishing Income	3,324	10%
Total Income	34,201	100%
Fuel costs	2,084	6%
Crew share	8,569	25%
Other Fishing Costs	2,318	7%
Total Fishing Costs	12,971	38%
Total Vessel Costs	7,039	21%
Total Operating Costs	20,010	59%
Operating Profit	14,191	41%
Depreciation	2,400	7%
Interest	451	1%
Other financial costs	605	2%
Net Profit	10,734	31%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.32 WoS nephrops 250kW and over

- The segment comprised 32 vessels with an average length of 18m
- In total the segment landed 3,809 tonnes of seafood worth £7.1million in 2009
- On average, these vessels landed 119 tonnes, worth £221,283
- Nephrops was the key species for this segment
- On average vessels made an operating profit of £7,336 in 2009

2009	Segment Total	Average per vessel
Active Vessels	32	-
Length (m)	-	18
Power (kW)	9,809	307
Registered Tonnage (GT)	2,635	82
VCU	7,862	246
Landings (Tonnes)	3,809	119
Fishing Income (£)	7,081,044	221,283
Days at Sea	5,994	187
Vessel Age	-	31
Crew	139	4

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

West of Scotland nephrops trawlers 250kW and over are based at ports along the west coast of Scotland, including Oban, Ullapool, Gairloch and Kinlochbervie. This segment is newly defined and replaces the former WoS nephrops twin-rig trawl segment. There are some larger single rig vessels in this new segment as the segment criteria no longer include the distinction between single and twin rig trawl.

Vessels in this segment spent on average 187 days at sea in 2009 targeting mostly nephrops. On average vessels had 4 crew members and the segment employed 139 fishermen in total.

Income

The segment landed 3,809 tonnes of seafood worth £7.1million in 2009. Therefore on average, active vessels landed 119 tonnes, worth £221,283.

Nephrops was the most important species to this segment in terms of both value and volume. The segment's average price for nephrops was just lower than the UK fleet average price for nephrops, see Figure 3.

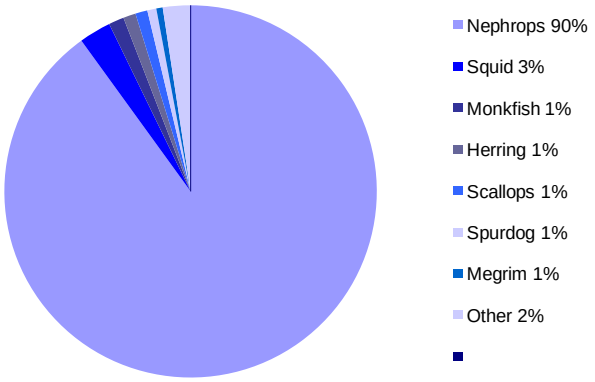

Figure 1. Value catch composition (Source: MMO, Seafish)

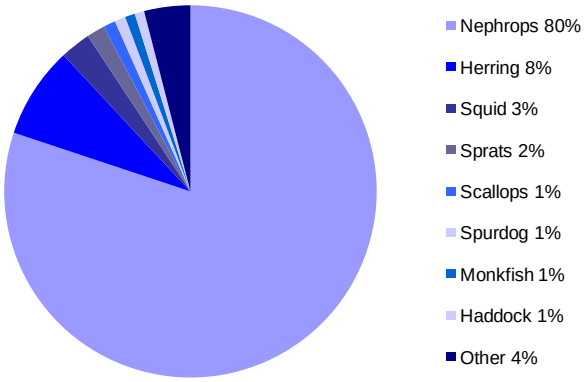

Figure 2. Volume catch composition (Source: MMO, Seafish)

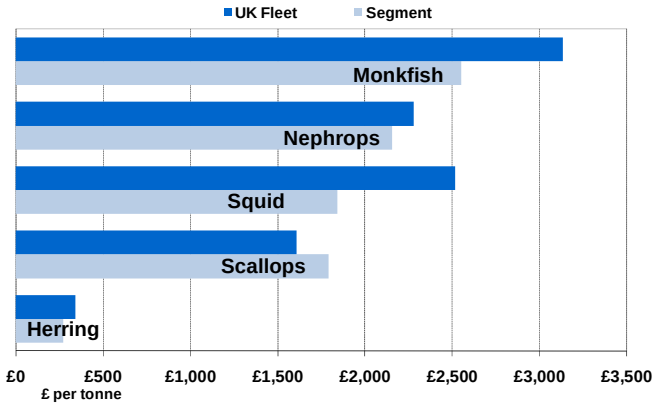

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.63 tonnes per day, obtained £1,962 per tonne and therefore earned £1,170 per day at sea. There was little variation in prices per tonne achieved between quartiles but vessels in the top quartile landed more tonnes per day at 0.92 compared to a segment average of 0.63 and 0.51 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	308,137	221,283	150,577
Tonnes / day	0.92	0.63	0.51
£ per tonne	1,912	1,962	1,819
£ per day	1,535	1,170	876
Days at Sea	201	187	172

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £219,953 or 97% of total income. There was a small variation between quartiles, with total operating costs for the most profitable quartile equating to 91% of income compared to 105% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 26% and 23% of total operating costs respectively.

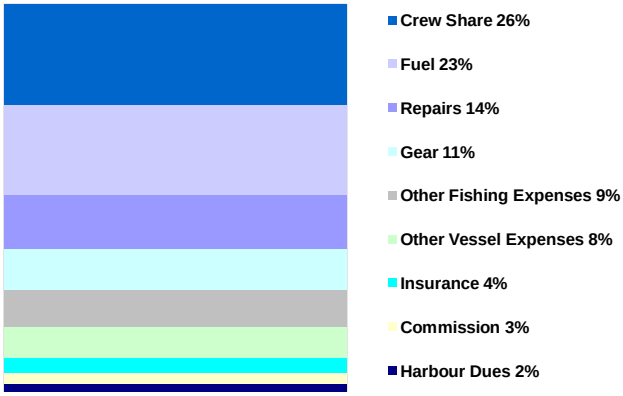

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 769 litres per day at sea costing £272 per day. Fuel consumption per day ranged from an average of 764 litres for vessels in the bottom quartile to an average of 743 litres for vessel in the top quartile.

On average, vessels consumed 1,362 litres of fuel per tonne of seafood landed. This varied substantially between most and least profitable quartiles at 944 litres and 1,626 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	53,060	51,013	46,772
Annual Litres	150,057	144,269	132,273
Cost per day at sea	263	272	270
Litres per day at sea	743	769	764
Litres per tonne landed	944	1,362	1,626

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £7,336 and after deducting depreciation and interest, vessels made on average a net loss of £11,727. There was a small range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £28,191 (9% of total income) compared to the bottom quartile average operating loss of £7,066 (-5% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit/loss for the top and bottom quartiles and the segment average.

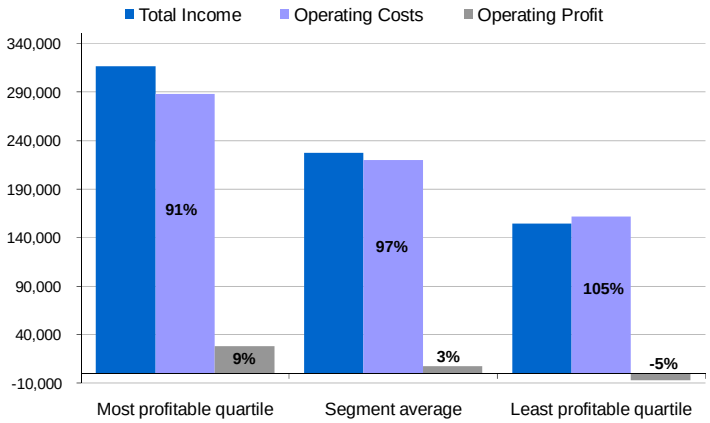

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	221,283	97%
Non-fishing Income	6,006	3%
Total Income	227,289	100%
Fuel costs	51,013	22%
Crew share	56,851	25%
Other Fishing Costs	30,961	14%
Total Fishing Costs	138,825	61%
Total Vessel Costs	81,128	36%
Total Operating Costs	219,953	97%
Operating Profit	7,336	3%
Depreciation	16,394	7%
Interest	1,811	1%
Other financial costs	858	0%
Net Profit	-11,727	-5%

Table 4. Income, costs, profit (Source: Seafish, MMO)

2.33 WoS nephrops under 250kW

- The segment comprised 119 vessels with an average length of 15m
- In total the segment landed 7,040 tonnes of seafood worth £14.3million in 2009
- On average, these vessels landed 59 tonnes, worth £120,229
- Nephrops was the key species for this segment
- On average vessels made an operating profit of £30,435 in 2009

2009	Segment Total	Average per vessel
Active Vessels	119	-
Length (m)	-	15
Power (kW)	18,742	157
Registered Tonnage (GT)	4,328	36
VCU	17,500	147
Landings (Tonnes)	7,040	59
Fishing Income (£)	14,307,208	120,229
Days at Sea	19,351	163
Vessel Age	-	32
Crew	376	3

Table 1. Segment characteristics (Source: MMO, Seafish)

Introduction

West of Scotland nephrops trawlers under 250kW are based at ports along the west coast of Scotland, including Oban, Ullapool, Gairloch and Troon. This segment is newly defined and replaces the former WoS nephrops single-rig trawl segment. There are some smaller twin- rig vessels in this new segment as the segment criteria no longer include the distinction between single and twin rig trawl.

Vessels in this segment spent on average 163 days at sea in 2009 targeting mostly nephrops. On average vessels had 3 crew members and the segment employed 376 fishermen in total.

Income

The segment landed 7,040 tonnes of seafood worth £14.3million in 2009. Therefore on average, active vessels landed 59 tonnes, worth £120,229.

Nephrops was the most important species to this segment in terms of both value and volume. The segment's average price for nephrops was slightly less than the UK fleet average price for nephrops, see Figure 3.

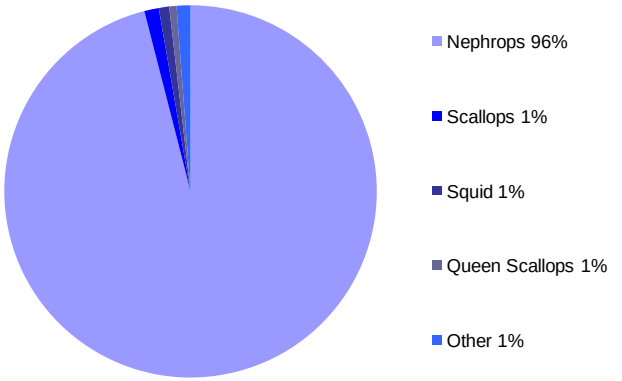

Figure 1. Value catch composition (Source: MMO, Seafish)

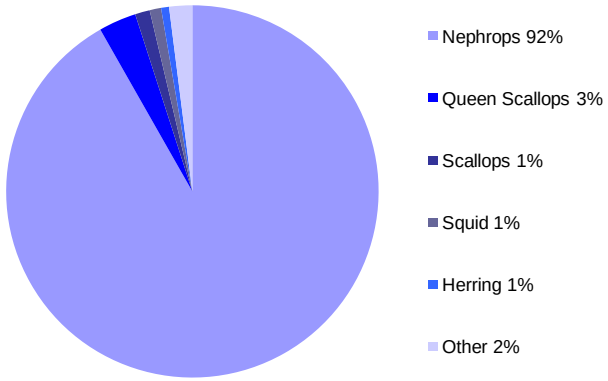

Figure 2. Volume catch composition (Source: MMO, Seafish)

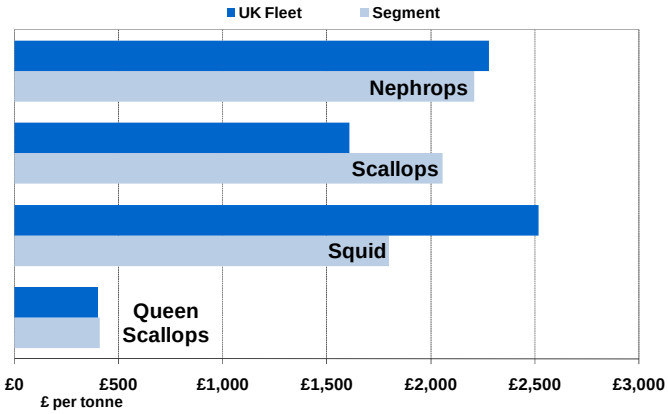

Figure 3. Average prices of key species (Source: MMO, Seafish)

Vessels in the segment were ranked in order of operating profit margin (operating profit / income) and split into quartiles. Table 2 shows that on average vessels in this segment landed 0.35 tonnes per day, obtained £2,238 per tonne and therefore earned £722 per day at sea. There was some variation in prices per tonne achieved between quartiles. Vessels in the top quartile landed slightly less tonnes per day at 0.32 compared to a segment average of 0.35 but slightly more than 0.30 in the bottom quartile.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Fishing Income (£)	126,008	120,229	94,841
Tonnes / day	0.32	0.35	0.30
£ per tonne	2,729	2,238	2,065
£ per day	788	722	557
Days at Sea	151	163	167

Table 2. Landings per day at sea (Source: Seafish, MMO)

Costs

Average total operating costs for vessels in the segment were £99,134 or 77% of total income. There was a variation between quartiles, with total operating costs for the most profitable quartile equating to 70% of income compared to 85% in the least profitable quartile. Crew share and fuel were the largest fishing costs, on average accounting for 28% and 23% of total operating costs respectively.

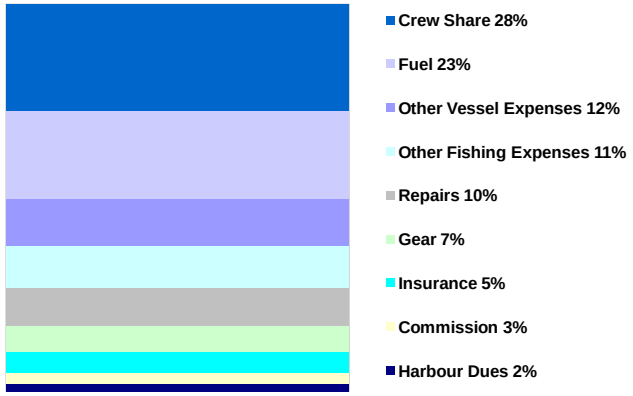

Figure 4. Operating costs breakdown (Source: Seafish)

Fuel

On average, vessels consumed 382 litres per day at sea costing £135 per day. Fuel consumption per day ranged from an average of 442 litres for vessels in the bottom quartile to an average of 266 litres for vessel in the top quartile.

On average, vessels consumed 1,204 litres of fuel per tonne of seafood landed. This varied between most and least profitable quartiles at 902 litres and 1,687 litres respectively.

	Average per vessel		
	Most profitable quartile	Segment average	Least profitable quartile
Annual Cost	15,230	22,565	26,309
Annual Litres	43,071	63,815	74,404
Cost per day at sea	94	135	156
Litres per day at sea	266	382	442
Litres per tonne landed	902	1,204	1,687

Table 3. Fuel cost and consumption (Source: Seafish)

Profit

The average operating profit for active vessels in the segment was £30,435 and after deducting depreciation and interest, vessels made on average a net profit of £18,664. There was a broad range of profit levels and margins within the segment. Average operating profit in the top quartile of vessels was £40,317 (30% of total income) compared to the bottom quartile average operating profit of £15,499 (15% of total income). Table 4 shows a break down of costs. Figure 5 shows total income, operating costs, and operating profit for the top and bottom quartiles and the segment average.

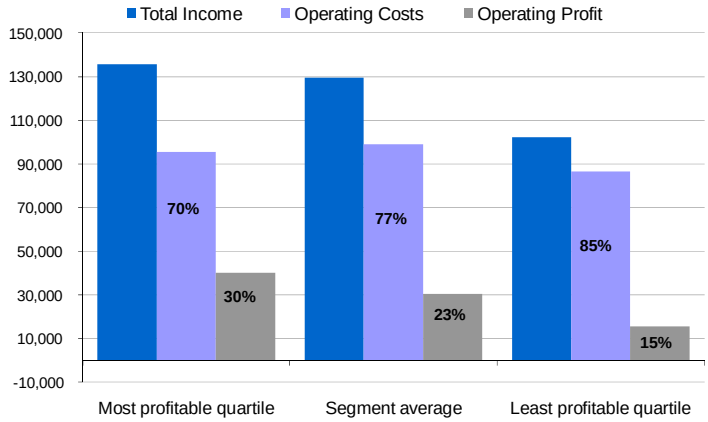

Figure 5. Total income, operating costs and operating profit; operating costs and operating profit as percent of total income (Source: Seafish, MMO)

	Segment Average	
	£	% of total income
Fishing Income	120,229	93%
Non-fishing Income	9,340	7%
Total Income	129,568	100%
Fuel costs	22,565	17%
Crew share	27,299	21%
Other Fishing Costs	15,849	12%
Total Fishing Costs	65,712	51%
Total Vessel Costs	33,421	26%
Total Operating Costs	99,134	77%
Operating Profit	30,435	23%
Depreciation	7,117	5%
Interest	3,645	3%
Other financial costs	1,009	1%
Net Profit	18,664	14%

Table 4. Income, costs, profit (Source: Seafish, MMO)

Appendix 1 - Methods

An overview of the processes and techniques used to produce earnings, costs and profit data for the UK fleet is outlined in the figure below. In brief, the research method involves collecting primary data on vessel costs from vessel owners' financial accounts, combining this with landings and vessel characteristics data from the Marine Management Organisation (MMO) to produce estimates of costs and profit for the key UK fleet segments.

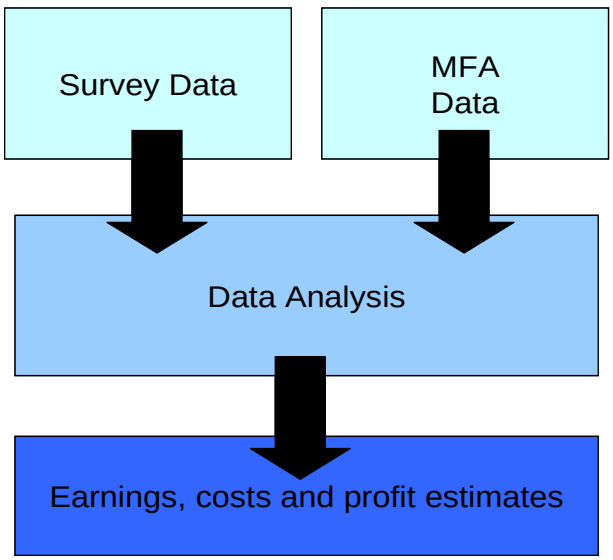

Figure A1.1 Earnings, costs and profit estimation method

Survey Data

In order to collect data on vessel costs, Seafish staff conducted face-to-face interviews with vessel owners across the UK and asked them to supply a copy of their financial accounts. There is no legal requirement in the UK for owners of fishing vessels to submit financial accounts to the government or to Seafish. In order to generate and disseminate economic information and analysis relating to the UK fishing fleet, we must persuade vessel owners to contribute their financial information voluntarily.

To collect such sensitive financial data, Seafish guarantees confidentiality of individual returns and Seafish staff must establish excellent relations and a high degree of trust with vessel owners and industry representatives at all levels.

Seafish has undertaken this task on behalf of the industry since the 1970s and vessel owners have given wide support to the production of analyses and forecasts based on their data. This report and any other Seafish report relating to fleet economics could not be produced without the faith and confidence placed in us by the vessel owners who contribute their vessel accounts voluntarily.

Seafish used a variety of techniques in undertaking the survey, including the following:

- Systematic surveying of regions across the UK to ensure comprehensive coverage of the UK fleet;

- Owners of more than one vessel were approached separately to maximise the likelihood that their vessels would be included in the survey;

- Seafish employed temporary research assistants to contribute to interviewing fishermen, using help from local contacts wherever possible;

- Seafish staff liaised with vessel accountants and agents to obtain information – some provided anonymous data for groups of vessels (financial information plus fleet segment);

- Seafish staff attended fishermen's workshops, exhibitions and meetings to build support for the project and interview fishermen.

At the end of the primary data collection phase, our dataset contained a mixture of quantitative and qualitative information taken from the completed survey forms and financial accounts. We obtained financial accounts on 380 vessels, representing an 8% sample rate of the active UK fleet. The sample rate for the large active fleet segments was much higher than the average for the active UK fleet.

MMO Data

The MMO provides Seafish with data on the value and volume of landings for every active vessel in the UK and this information is a key input to our analysis. In addition, the MMO provides information on the characteristics of each vessel and on other variables such as gear types and days at sea.

Data Analysis

After completing the data collection phase, the various strands of data were quality checked for accuracy, before proceeding to the next stage of producing accurate costs and profit estimates.

Given the wide variation in type and activity of fishing vessel in the UK fleet, accurate and appropriate segmentation of the fleet is vital. Since 2002, Seafish has developed a fleet segmentation based on the physical characteristics of vessels, their activity levels, the gear used, species targeted and areas fished. The aim is to provide insightful information on the financial performance of similar or comparable groups of vessels.

For the 2008 fleet report two new 'low activity' segments were created for under 10m and 10m and over vessels. Vessels in these two segments earned less than £10,000 fishing income per year and/or spent less than 20% of the average days at sea of the related segment. The removal of these vessels from other segments prevents the averages being skewed by lower activity vessels.

Segmentation for some key gear types is checked with industry experts to ensure that vessels are correctly allocated to a segment, for example, twin-rig or single-rig nephrops trawl segments.

Earnings, costs and profit estimates

Once the survey data relating to 2009 was quality checked it was then used to estimate costs and profit for each of the Seafish fleet segments. The methods used to derive final estimates from sample data for the key variables are outlined below.

Fishing income data was supplied to Seafish for every active vessel in the UK fleet by the MMO.

Non-fishing income is estimated based on survey sample data. Non-fishing income relates to income earned from source other than fishing and includes undertaking guard duties to cable companies, towage activities and selling quota and days at sea.

The estimated costs for the entire UK fleet based were based on the sample data collected from vessels financial accounts. Fuel cost and crew cost are the two key costs for a vessel. Therefore, our estimation method gave these costs priority over other costs.

Fuel cost – A new method was adopted for estimating fuel cost based on estimated fuel consumption for each vessel.

Fuel cost = (average fuel price per litre) * (DAS) * (assumed daily consumption of fuel in litres, by fuel category)

Vessels in each segment were split into three size categories (small, medium and large) determined by their VCUs. For each of these size categories, a corresponding daily consumption of fuel in litres was applied. The daily consumption figures are based on evidence from sample data fuel costs from vessel accounts. Daily consumption for each vessel was then multiplied by each vessel's annual days at sea to give annual consumption in litres. Annual fuel use (litres) is then multiplied by the average fuel price in 2009 (excluding duty).

Crew share – estimated crew share was calculated based on the segments average percentage share of crew share costs as a percentage of income. Crew share is a well defined expense in most vessel accounts and therefore this is an accurate method for estimation of this key cost.

Other Fishing Costs - Given that sample sizes vary for remaining fishing costs (shore labour, ice, boxes etc) for each sample vessel within a segment, we adopted a top down approach to calculating fishing costs which constrained the total value of fishing costs to the average from the segment and adjusted for each vessels individual fuel cost and crew share estimate as outlined above. The constrained total cost value was then split among key fishing costs (commissions, harbour dues, subsidies and levies, shore labour, boxes, ice, crew travel, food stores, quota leasing, days purchased, other fishing costs) using adjusted shares of each cost over total costs.

Vessel costs - (Insurance, repairs, gear cost, hire and maintenance, other vessel costs, total vessel owner costs) were estimated based on sample data and the average costs structure as a proportion of earnings for the sample vessels in each segments was applied to non-sample vessels.

Operating profit is calculated by total income less total operating costs (fuel, crew share, other fishing costs and vessel costs).

Depreciation – estimated based on sample data and the average costs structure as a proportion of earnings for the sample vessels in each segments was applied to non-sample vessels.

Interest – estimated based on sample data and the average costs structure as a proportion of earnings for the sample vessels in each segments was applied to non-sample vessels.

Other Financial Costs – some sets of vessel accounts showed additional costs, such as bank charges, relating to obtaining finance via commercial providers.

Net Profit – is calculated by operating profit less depreciation and interest.

Crew employment - The estimation of employment is based on survey data collected from vessel owners around the UK ports. This provides details on the number of engaged crew both full-time and part-time. This sample information is then used to estimate total engaged crew based on the physical characteristics of the individual vessel and the vessels level of activity.

Time period

The aim of the study is to produce financial information relating to the calendar year 2009. The earnings data and activity data comes from the MMO and is based on the calendar year. Costs information is based on annual financial accounts collected during our survey. The timeframe for accounts varies by individual vessel and does not always cover the calendar year. We use accounts which have a majority of months falling into 2009.

Further details relating to survey and data analysis methods can be obtained from the authors.

Appendix 2 – Survey Questionnaire

Name of interviewer

Fishing Vessel Accounts Permission Form

Industry organisations, RACs and fisheries departments need to have accurate information on fleet economics to contribute to better fisheries management and be able to assess the impact of closed areas or management measures on the fishing fleet.

To provide this essential information, Seafish conducts surveys to report on the financial performance of all major segments of the UK fishing fleet.

So that we get enough accurate information, it would help if you supply your year-end accounts. In return, we can offer a personal benchmark report for your vessel.

Your information will be used **anonymously**, for Seafish reports and in contribution to fisheries economics working groups in Europe and the UK.

No individual vessel will be identified in any report.

*I hereby give permission for Seafish to obtain from my accountant my complete financial accounts for **2009**/2010 and the next three financial years (until 2012/2013).*

(Signature) _____

OR

*I hereby give permission for Seafish to obtain from my accountant my complete financial accounts for **2009**/2010.*

(Signature) _____

Vessel Name: _____ **Vessel PLN:** _____ **Vessel Length:** _____

Vessel owner name (print): _____ **Date:** _____

Phone no. of vessel owner: _____

Accountancy firm: _____ **Contact name:** _____

Accountant Address: **Accountant Phone:**

Please tick this box if you would like a personal benchmark report for your vessel ☐

If you would like to receive a copy of Seafish reports relevant to your fleet segment please write your contact address here:

All information obtained will be treated in strict confidence in line with Seafish policy

Thank you!

FUEL CONSUMPTION – we want to estimate litres of fuel per day at sea for your vessel

1. How many trips (*trip counted as one landing*) did your vessel make in 2009? _____

2. How many days at sea is your average trip? _____

3. How many litres of fuel did your vessel use per trip in 2009? _____Litres *and/or* 3.a) £_____

CREW – we want to estimate the number of full time equivalent jobs on board your vessel

4. How many onboard jobs, including skipper, did your vessel support in 2009 ? _____

- **4a)** Full Time (over 37 hours per week) _____
- **4b)** Part time (under 37 hours per week) _____
- **4c)** Foreign Crew (outside EEA) _____

5. How many workers, including skipper, were on board per trip? _____

6. Do you rotate crew? ___Yes / No. **6.a)** If yes, what is the rotation?_____

7. Do you employ seasonal crew? ____Yes / No. **7.a)** If yes, what pattern? _____

8. On average, how many hours per day did each crew member work? _____

VESSEL – we want to estimate the capital value of the UK fleet, starting with your vessel

9. What year did you purchase this vessel? _____

10. How much did you pay for the vessel? _£_____

11. Was the vessel new or second hand? _____New / Second hand_____

12. What is the value of the vessel on your balance sheet? __£_____

13. Did you make any investment in your vessel in 2009? Yes/No

13a. What did you buy? _____ **13b.** How much did you spend? _____

QUOTA & FISHING RIGHTS – we want to estimate the value of fishing rights in the UK fleet

14. Please estimate the value of your quota units at the end of 2009 £_____

15. Please estimate the value of your vessel Licence (inc. entitlements) £_____

16. Did you buy or sell or lease in/out any quota units in 2009 (species, quantity in units or tonnes, value)?

	BUY	SELL	LEASE IN	LEASE OUT
Species (incl Area)	a.	b.	c.	d.
Quantity	e.	f.	g.	h.
Value	i.	j.	k.	l.

17. Number of Days at sea: **17.a)** bought in 2009 _____ **17.b)** total cost **£**_____

17.c) sold in 2009 _____ **17.d)** total income **£**_____

GENERAL – we want to know what concerned you most last year, and what about this year?

18. What were the major factors affecting your financial performance in 2009?

19. What do you think will be the key issues facing the fishing industry over the next five years? What do you think can be done to address these issues?

Appendix 3 - Seafish Segmentation Criteria

Qualifying criteria for Seafish segments								
	Seafish Segments	**Main Area**	**Main DAS Gear**	**Main Species by value**	**Main Gear Type**	**Power Main Engine**	**Vessel Length**	**Value of landings**
1	Area VII scallop dredge	VIIA, VIIDE, VIIFG, VII other		Scallops			>= 10m	
2	Area VIIA demersal trawl	VIIA	Demersal Trawl and Demersal Seiner				>= 10m	
3	Area VIIA nephrops 250kW & over	VIIA	Demersal Trawl and Demersal Seiner	Nephrops		>= 250 kW	>= 10m	
4	Area VIIA nephrops under 250kW	VIIA	Demersal Trawl and Demersal Seiner	Nephrops		<250 kW	>= 10m	
5	Area VIIB-K trawlers 10-24m	VIIDE, VIIFG, VII other	Demersal Trawl and Demersal Seiner	Not Nephrops			>= 10m & <24m	
6	Area VIIB-K 24-40m	VIIDE, VIIFG, VII other	Demersal Trawl and Demersal Seiner	Not Nephrops			>= 24m & <40m	
7	Gill netters		Drift Nets and Fixed Nets	Not Nephrops			>= 10m	
8	Longliners		Gears using hooks	Not Nephrops			>= 10m	
9	Low activity 10m and over						>= 10m	< £10,000
10	Low activity under 10m						< 10m	< £10,000
11	Miscellaneous vessels						>= 10m	
12	North Sea beam trawl 300kW & over	NS	Beam Trawl	Not Nephrops		>= 300 kW	>= 10m	
13	North Sea beam trawl under 300kW	NS	Beam Trawl	Not Nephrops		< 300 kW	>= 10m	
14	North Sea nephrops 300kW & over	NS	Demersal Trawl and Demersal Seiner	Nephrops		>= 300 kW	>= 10m	
15	North Sea nephrops under 300kW	NS	Demersal Trawl and Demersal Seiner	Nephrops		< 300 kW	>= 10m	
16	NSWoS demersal trawl 24m & over	NS, WoS		Not Nephrops			>= 24m	
17	NSWoS demersal pair trawl / seine	NS, WoS	Demersal Trawl and Demersal Seiner	Not Nephrops	Paired Trawl		>= 10m	
18	NSWoS demersal seiners	NS, WoS	Demersal Trawl and Demersal Seiner	Not Nephrops	Scottish Seiner		>= 10m	
19	NSWoS demersal under 24m, 300kW & over	NS, WoS	Demersal Trawl and Demersal Seiner	Not Nephrops		>= 300 kW	>= 10m & <24m	
20	NSWoS demersal under 24m under 300kW	NS, WoS	Demersal Trawl and Demersal Seiner	Not Nephrops		< 300 kW	>= 10m & <24m	
21	NSWoS scallop dredge	NS, WoS	Dredges	Scallops			>= 10m	
22	Pelagic 40m & over		Pelagic: Trawl, Seiner / Purse Seiner	Mackerel			>= 40m	
23	Pots and traps 10m - 12m		Pots and Traps				>= 10m & <12m	
24	Pots and traps 12m & over		Pots and Traps				>= 12m	
25	South West beam trawl under 250kW	VIIDE, VIIFG	Beam Trawl			< 250 kW	>= 10m	
26	South West beam trawl 250kW & over	VIIDE, VIIFG	Beam Trawl			>= 250 kW	>= 10m	
27	Under 10m demersal trawl / seine		Demersal Trawl and Demersal Seiner				< 10m	
28	Under 10m drift and/or fixed nets		Drift Nets and Fixed Nets				< 10m	
29	Under 10m mobile other				Beam Trawl, Dredges		< 10m	
30	Under 10m pots and traps		Pots and Traps				< 10m	
31	Under 10m using hooks		Gears using hooks				< 10m	
32	WoS nephrops 250kW & over	WoS	Demersal Trawl and Demersal Seiner	Nephrops		>= 250 kW	>= 10m	
33	WoS nephrops under 250kW	WoS	Demersal Trawl and Demersal Seiner	Nephrops		< 250 kW	>= 10m	

Appendix 4 – UK Fleet Summary Tables

Table A4.1: 2009 Segment totals for income, costs and profit (£)

Segment	Active Vessels	Fishing Income	Non-fishing Income	Total Income	Fuel cost	Crew Share cost	Other Fishing costs
Area VII scallop dredge	54	23,457,724	540,083	23,997,807	3,162,696	6,233,132	1,457,997
Area VIIa demersal trawl	9	571,671	51,403	623,074	157,352	97,984	93,338
Area VIIa nephrops >250kW	36	6,606,420	-	6,606,420	1,603,470	1,211,888	1,072,540
Area VIIa nephrops <250kW	63	5,621,250	358,917	5,980,167	941,799	1,743,415	904,865
Area VIIb-k trawlers 10-24m	58	9,050,826	n/a	n/a	1,580,309	n/a	n/a
Area VIIb-k trawlers 24-40m	13	13,350,657	29,151	13,379,809	3,180,809	2,440,185	3,450,836
Gill netters	41	13,935,024	-	13,935,024	959,812	4,112,580	1,421,158
Longliners	29	15,364,721	n/a	n/a	2,698,163	n/a	n/a
Low activity 10m and over	69	275,635	n/a	n/a	n/a	n/a	n/a
Low activity <10m	1,829	5,751,177	n/a	n/a	n/a	n/a	n/a
Miscellaneous	54	41,634,882	n/a	n/a	n/a	n/a	n/a
N.Sea beam trawl >300kW	9	10,574,152	n/a	n/a	4,024,569	n/a	n/a
N.Sea beam trawl <300kW	27	1,654,925	48,403	1,703,328	978,058	398,199	85,656
N.Sea nephrops >300kW	83	36,469,252	3,248,487	39,717,741	8,740,780	9,270,214	5,970,223
N.Sea nephrops <300kW	84	14,955,303	1,389,557	16,344,860	3,552,647	3,635,308	2,360,234
NSWoS demersal >24m	46	58,314,281	1,273,182	59,587,467	15,021,529	13,757,101	12,717,996
NSWoS demersal pairs	41	26,966,484	1,282,275	28,248,759	3,853,657	7,743,430	7,472,266
NSWoS demersal seiners	23	13,925,290	1,392,980	15,318,270	1,757,038	3,842,352	4,059,301
NSWoS demersal <24m >300kW	47	28,690,149	1,117,554	29,807,705	6,102,888	6,656,706	6,629,381
NSWoS demersal <24m <300kW	34	5,836,490	141,066	5,977,556	969,985	1,695,378	1,040,069
NSWoS scallop dredge	62	16,477,577	764,572	17,242,148	2,751,114	4,004,756	1,662,598
Pelagic 40m and over	28	175,634,855	n/a	n/a	n/a	n/a	n/a
Pots and traps 10-12m	177	16,586,075	236,735	16,822,810	1,446,383	4,571,947	1,579,135
Pots and traps 12m and over	83	20,585,383	3,489,452	24,074,835	3,284,895	6,389,208	2,606,488
S.West beam trawl <250kW	21	7,687,379	14,416	7,701,795	1,712,396	1,959,853	968,770
S.West beam trawl >250kW	12	7,226,271	-	7,226,271	2,099,606	1,950,884	571,265
<10m demersal trawl/seine	216	12,371,487	529,289	12,900,776	1,514,488	3,170,252	956,264
<10m drift / fixed nets	238	10,074,504	-	10,074,504	861,946	3,074,378	204,019
<10m mobile other	94	4,855,809	n/a	n/a	n/a	n/a	n/a
<10m pots and traps	991	43,881,250	2,560,687	46,441,937	5,478,063	11,318,944	2,510,360
<10m using hooks	105	3,242,127	348,968	3,591,095	218,785	899,793	243,372
WoS nephrops >250kW	32	7,081,044	192,204	7,273,248	1,632,430	1,819,231	990,751
WoS nephrops <250kW	119	14,307,208	1,111,439	15,418,647	2,685,235	3,248,528	1,885,989
Total UK Fleet *	4,827	673,017,280	25,585,373	698,602,662	104,762,602	168,519,297	89,698,283

* Figures for the total UK fleet include estimates for fleet segments shown as n/a in this table.

Total Fishing Costs	Total Vessel Costs	Total Operating Costs	Operating Profit	Depreciation	Interest	Net Profit	Segment
10,853,825	7,999,339	18,853,163	5,144,644	1,128,779	312,792	3,703,073	Area VII scallop dredge
348,674	133,467	482,140	140,934	45,732		95,202	Area VIIa demersal trawl
3,887,898	1,580,725	5,468,623	1,137,797	532,655	130,978	200,064	Area VIIa nephrops >250kW
3,590,079	1,084,541	4,674,620	1,305,546	302,845	221,751	682,090	Area VIIa nephrops <250kW
4,643,771	2,734,399	7,378,169	2,372,270	198,696	264,224	1,827,065	Area VIIb-k trawlers 10-24m
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Area VIIb-k trawlers 24-40m
6,493,549	4,560,719	11,054,268	2,880,757	305,604	97,151	2,270,468	Gill netters
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Longliners
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Low activity 10m and over
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Low activity <10m
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Miscellaneous
n/a	n/a	n/a	n/a	n/a	n/a	n/a	N.Sea beam trawl >300kW
1,461,913	164,262	1,626,175	77,152	361,930	78,820	- 367,362	N.Sea beam trawl <300kW
23,981,217	9,512,858	33,494,075	6,223,665	2,741,491	1,027,297	1,793,421	N.Sea nephrops >300kW
9,548,189	4,827,714	14,375,902	1,968,958	843,370	419,568	159,459	N.Sea nephrops <300kW
41,496,627	13,176,479	54,673,106	4,914,359	4,113,683	1,423,995	- 623,319	NSWoS demersal >24m
19,069,353	6,808,022	25,877,375	2,371,383	1,564,954	488,047	225,738	NSWoS demersal pairs
9,658,692	3,365,188	13,023,880	2,294,390	1,155,686	886,105	83,167	NSWoS demersal seiners
19,388,976	6,915,178	26,304,154	3,503,550	2,118,007	840,593	16,031	NSWoS demersal <24m >300kW
3,705,432	1,671,315	5,376,746	600,810	186,879	138,658	275,274	NSWoS demersal <24m <300kW
8,418,467	5,165,849	13,584,316	3,657,832	986,786	93,002	2,535,371	NSWoS scallop dredge
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Pelagic 40m and over
7,597,465	3,167,446	10,764,912	6,057,898	1,029,495	337,476	3,967,012	Pots and traps 10-12m
12,280,591	6,146,192	18,426,783	5,648,051	889,955	201,288	4,556,809	Pots and traps 12m and over
4,641,019	1,700,546	6,341,565	1,360,230	98,679	195,003	1,010,072	S.West beam trawl <250kW
4,621,755	1,763,615	6,385,370	840,901	291,674	-	549,226	S.West beam trawl >250kW
5,641,004	3,173,155	8,814,159	4,086,617	1,474,880	489,749	2,044,236	<10m demersal trawl/seine
4,140,343	2,566,264	6,706,607	3,367,897	515,300	182,846	2,561,786	<10m drift / fixed nets
n/a	n/a	n/a	n/a	n/a	n/a	n/a	<10m mobile other
19,307,367	9,001,944	28,309,310	18,132,626	4,291,818	827,302	12,829,328	<10m pots and traps
1,361,950	739,060	2,101,010	1,490,085	252,040	47,401	1,127,051	<10m using hooks
4,442,412	2,596,091	7,038,503	234,746	524,600	57,963	- 375,270	WoS nephrops >250kW
7,819,752	3,977,151	11,796,903	3,621,744	846,894	433,748	2,220,986	WoS nephrops <250kW
363,007,630	157,745,361	520,752,545	177,911,598	66,137,954	31,404,749	75,731,938	Total UK Fleet*

Table A4.2: 2009 Segment averages per vessel income, costs and profit (£)

Segment	Active Vessels	Fishing Income	Non-fishing Income	Total Income	Fuel cost	Crew Share cost	Other Fishing costs
Area VII scallop dredge	54	434,402	10,002	444,404	58,568	115,428	27,000
Area VIIa demersal trawl	9	63,519	5,711	69,230	17,484	10,887	10,371
Area VIIa nephrops >250kW	36	183,512	-	183,512	44,541	33,664	29,793
Area VIIa nephrops <250kW	63	89,226	5,697	94,923	14,949	27,673	14,363
Area VIIb-k trawlers 10-24m	58	156,049	12,062	168,111	27,247	34,745	18,073
Area VIIb-k trawlers 24-40m	13	1,026,974	n/a	n/a	244,678	n/a	n/a
Gill netters	41	339,879	-	339,879	23,410	100,307	34,662
Longliners	29	529,818	n/a	n/a	93,040	n/a	n/a
Low activity 10m and over	69	3,995	n/a	n/a	n/a	n/a	n/a
Low activity <10m	1,829	3,144	n/a	n/a	n/a	n/a	n/a
Miscellaneous	54	771,016	n/a	n/a	n/a	n/a	n/a
N.Sea beam trawl >300kW	9	1,174,906	n/a	n/a	447,174	n/a	n/a
N.Sea beam trawl <300kW	27	61,294	1,793	63,086	36,224	14,748	3,172
N.Sea nephrops >300kW	83	439,389	39,138	478,527	105,311	111,689	71,930
N.Sea nephrops <300kW	84	178,039	16,542	194,582	42,293	43,277	28,098
NSWoS demersal >24m	46	1,267,702	27,678	1,295,380	326,555	299,067	276,478
NSWoS demersal pairs	41	657,719	31,275	688,994	93,992	188,864	182,250
NSWoS demersal seiners	23	605,447	60,564	666,012	76,393	167,059	176,491
NSWoS demersal <24m >300kW	47	610,429	23,778	634,206	129,849	141,632	141,051
NSWoS demersal <24m <300kW	34	171,661	4,149	175,810	28,529	49,864	30,590
NSWoS scallop dredge	62	265,767	12,332	278,099	44,373	64,593	26,816
Pelagic 40m and over	28	6,272,673	n/a	n/a	n/a	n/a	n/a
Pots and traps 10-12m	177	93,707	1,337	95,044	8,172	25,830	8,922
Pots and traps 12m and over	83	248,017	42,042	290,058	39,577	76,978	31,403
S.West beam trawl <250kW	21	366,066	686	366,752	81,543	93,326	46,132
S.West beam trawl >250kW	12	602,189	-	602,189	174,967	162,574	47,605
<10m demersal trawl/seine	216	57,275	2,450	59,726	7,012	14,677	4,427
<10m drift / fixed nets	238	42,330	-	42,330	3,622	12,918	857
<10m mobile other	94	51,658	n/a	n/a	n/a	n/a	n/a
<10m pots and traps	991	44,280	2,584	46,864	5,528	11,422	2,533
<10m using hooks	105	30,877	3,323	34,201	2,084	8,569	2,318
WoS nephrops >250kW	32	221,283	6,006	227,289	51,013	56,851	30,961
WoS nephrops <250kW	119	120,229	9,340	129,568	22,565	27,299	15,849

Total Fishing Costs	Total Vessel Costs	Total Operating Costs	Operating Profit	Depreciation	Interest	Net Profit	Segment
200,997	148,136	349,133	95,271	20,903	5,792	68,575	Area VII scallop dredge
38,742	14,830	53,571	15,659	5,081		10,578	Area VIIa demersal trawl
107,997	43,909	151,906	31,605	14,796	3,638	5,557	Area VIIa nephrops >250kW
56,985	17,215	74,200	20,723	4,807	3,520	10,827	Area VIIa nephrops <250kW
80,065	47,145	127,210	40,901	3,426	4,556	31,501	Area VIIb-k trawlers 10-24m
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Area VIIb-k trawlers 24-40m
158,379	111,237	269,616	70,262	7,454	2,370	55,377	Gill netters
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Longliners
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Low activity 10m and over
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Low activity <10m
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Miscellaneous
n/a	n/a	n/a	n/a	n/a	n/a	n/a	N.Sea beam trawl >300kW
54,145	6,084	60,229	2,857	13,405	2,919	- 13,606	N.Sea beam trawl <300kW
288,930	114,613	403,543	74,984	33,030	12,377	21,607	N.Sea nephrops >300kW
113,669	57,473	171,142	23,440	10,040	4,995	1,898	N.Sea nephrops <300kW
902,101	286,445	1,188,546	106,834	89,428	30,956	- 13,550	NSWoS demersal >24m
465,106	166,049	631,155	57,839	38,170	11,904	5,506	NSWoS demersal pairs
419,943	146,313	566,256	99,756	50,247	38,526	3,616	NSWoS demersal seiners
412,531	147,131	559,663	74,544	45,064	17,885	341	NSWoS demersal <24m >300kW
108,983	49,156	158,140	17,671	5,496	4,078	8,096	NSWoS demersal <24m <300kW
135,782	83,320	219,102	58,997	15,916	1,500	40,893	NSWoS scallop dredge
n/a	n/a	n/a	n/a	n/a	n/a	n/a	Pelagic 40m and over
42,924	17,895	60,819	34,225	5,816	1,907	22,412	Pots and traps 10-12m
147,959	74,051	222,009	68,049	10,722	2,425	54,901	Pots and traps 12m and over
221,001	80,978	301,979	64,773	4,699	9,286	48,099	S.West beam trawl <250kW
385,146	146,968	532,114	70,075	24,306	-	45,769	S.West beam trawl >250kW
26,116	14,691	40,806	18,920	6,828	2,267	9,464	<10m demersal trawl/seine
17,396	10,783	28,179	14,151	2,165	768	10,764	<10m drift / fixed nets
n/a	n/a	n/a	n/a	n/a	n/a	n/a	<10m mobile other
19,483	9,084	28,566	18,297	4,331	835	12,946	<10m pots and traps
12,971	7,039	20,010	14,191	2,400	451	10,734	<10m using hooks
138,825	81,128	219,953	7,336	16,394	1,811	- 11,727	WoS nephrops >250kW
65,712	33,421	99,134	30,435	7,117	3,645	18,664	WoS nephrops <250kW

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