

DOMESTIC FISHERY

The British fishing industry supplies two-thirds of the nation's requirements and is an important source of employment and income in a number of ports in the south west, on the east coast and in Scotland. At the end of 1990 there was a total of 10,313 vessels in the British fishing fleet, 2,366 of which were based in Scotland. The industry has been adversely affected by the extension of territorial waters by other countries and by overfishing. In January 1983 the EC finally agreed to a fisheries policy which would be applicable for at least 20 years. Under these arrangements EC countries are entitled to fish up to the UK's 12 mile limit, with certain countries also entitled to fish within selected areas of the UK's 6-12 mile zone. In addition, agreements were reached over mesh sizes for nets and for catch quotas for member countries. Such an agreement was important to the UK fishing fleet, which had lost fishing rights in distant areas (such as Iceland) following the extension of national economic zones to 200 miles as a result of the *Law of the Sea*.

LANDINGS

Early 1993 domestic landings have produced a glut for certain species (mainly haddock and cod), which has in turn caused a fall in prices. United Kingdom landings for 1992 increased slightly over 1991, from 594,672 tonnes up to 598,991 tonnes valued at £395,267,000. Broken down for 1992, landings were: pelagics (261,078 tonnes valued at £30,773,000); demersals (242,952 tonnes valued at £278,110,000) and, shellfish (94,961 tonnes valued at £86,384,000).

SPECIES

Individual species which were the most dominant within the 1992 domestic U.K. landings are outlined by the following statistics. Pelagic: 1) mackerel 149,838 tonnes; 2) herring 88,668 tonnes; and, 3) other pelagics 22,572 tonnes. Demersal: 1) cod 53,093 tonnes; 2) haddock 46,413 tonnes; 3) whiting 39,059 tonnes; 4) other demersal 35,546; and, 5) plaice 22,480 tonnes. Shellfish: 1) other shellfish 59,598 tonnes; 2) nephrops 24,768 tonnes; and, 3) crab 10,595 tonnes.

EXPORTS

United Kingdom exports of fishery products increased marginally in 1992 to 421,525 tonnes from 413,888 tonnes in 1991. Freshwater fish exports in 1992 were 22,665 tonnes. Exports of fresh and chilled sea fish totalled 7,098 tonnes, frozen sea fish 127,120 tonnes, and cured sea fish exports 3,664 tonnes. Crustacean exports for 1992 were 39,116 tonnes, molluscs 24,748 tonnes, sea fish preparations 21,438 tonnes, and sea fish not previously specified 10,462 tonnes.

PROCESSING SECTOR

About 75% of all UK landings are made in Scotland and a number of processors are based in the area. However, Hull and Grimsby, on the east coast of England, still have significant processing industries. The United Kingdom has a well developed secondary fish processing sector, dating from before the establishment of the 200 mile limit when domestic landings were much higher. This sector largely develops consumer packs and sells to supermarkets and freezer centres. These processors buy some raw material wet from UK ports, but they are heavily dependent on imported frozen product. Some processors buy direct from foreign suppliers while others rely on UK importers. A few companies import frozen product for their own use, as well as acting a buyers for other secondary processing firms. In addition, there are specialist fish trading firms whose primary business is import and export, with exports largely moving to continental Europe.