Rationale for Change – Decline in Profitability of Pot Fisheries

The B&PSC agreed certain rationales for change, and these were included in the Netting Conditions formal consultation. The Members recognised a reported decline in the profitability in pot fisheries. This was largely in relation to the decline in landings of brown crab across the District.

D&S IFCA does not have access to all the different datasets available to provide information on changes over time in the profitability of the pot fisheries. The required data, to identity changes over many years, would include days at sea, vessel power, fuel usage and costs, vessel operating costs, repair and replacement costs, gear costs, harbour dues, bait prices, depreciation, fishing income, and crew costs. In addition, D&S IFCA does not have the expertise to analyse these performance and economic data. Therefore, the data that can be referred to in this Annex are the landings of brown crab and lobster into D&S IFCA ports and the value of these landings. Officers have analysed the brown crab and lobster landings data from 2008 up to the end of November 2023 (the most up to date provisional figures available from the MMO). The data therefore do not include the Christmas market for crab and lobster in December.

The data provided for the over 10m vessels (and those for all vessels) include the high-capacity vessels with vivier tanks which hold tonnes of crab or lobster, and which work several thousand pots operating over days/weeks at sea before coming into D&S IFCA ports to land. A majority of these boats do not operate in the D&S IFCA District, but their landings are included in the landings data provided by the MMO. To remove the unknown influence of the offshore potting vessels in the data, the under 10 metre vessel data are more representative of the entire inshore fleet whilst recognising that 18 vessels are over 10m (but under 15.24m) out of a total of 184 vessels that are permitted to fish within the District.

In summary of the information below and focussing on the 10m and under fleet, crab landings has declined since 2016 and the value peaked in 2019 and thereafter have been in decline. The trendline included in the figures indicate a declining trend of crab landings since 2008. The trendline for the value of the brown crab fishery for the 10m and under vessels show that since 2008 the value trendline is level at £1 million. The lobster landings into D&S IFCA ports for the under 10m vessels have been steadily rising since 2008 and have appear to have stabilised at peak levels since 2019 and the value of landings been increasing since 2008 and overall have stabilised in the last two years. The trendline for both landings and value for the 10m and under fleet show an increase since 2008.

Brown Crab

Figures 1-3 show the landings and value of brown crab from 2008 to 2023 (up to end of November) into D&S IFCA ports. The landings of brown crab have declined following peak landings between 2013 and 2016, with landings in 2014 reaching 4084.41 tonnes, for all vessels. The over 10m fleet data include landings from the offshore vivier vessels that land into Devon ports. Figures 1 to 3 show that landing have decreased and have not returned to pre-peak figures in 2008. In fact, total landing in 2022 into D&S IFCA ports was 1584 tonnes compared to 2399.38 in 2008. For the under 10m fleet the landings in 2008 were 637.37 tonnes compared to 220.73 tonnes in 2022. However, from 2008 to 2022 the overall value of landings has increased as shown in the trendline. For all vessels, the value has increased from £3.18 million in 2008 to £5.47 million in 2022. For the under 10m fleet the value has reflected the fluctuations in landings and the trendline is horizontal showing a level of £1 million.

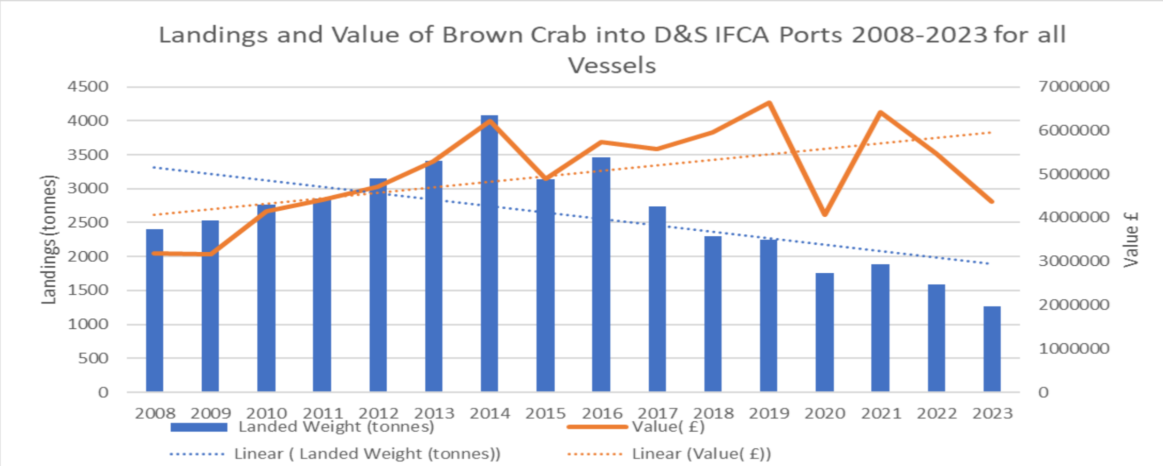

Figure 1 Landings and value of Brown Crab into D&S IFCA Ports 2008-2023

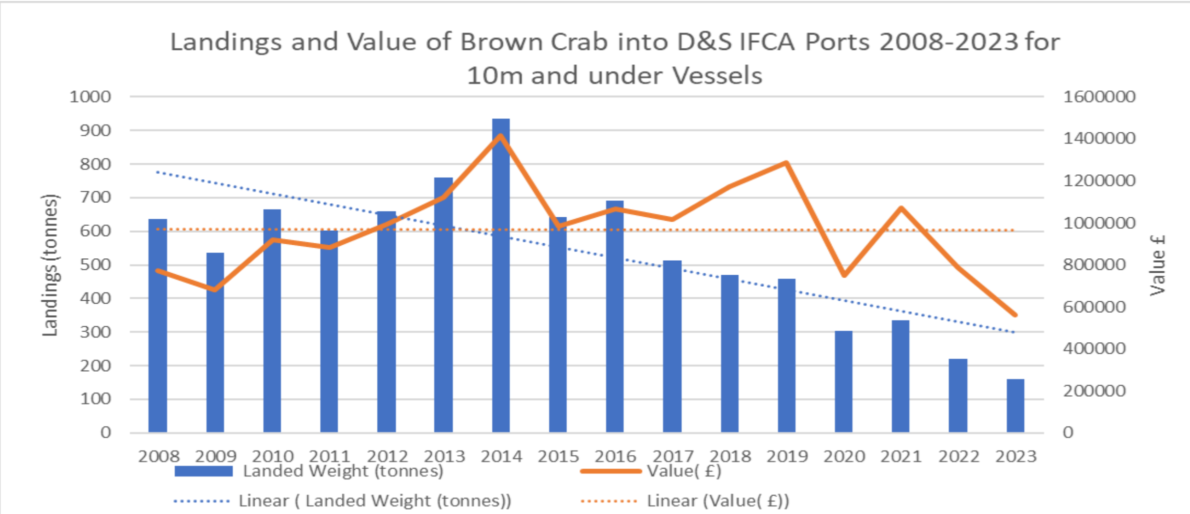

Figure 2 Landings and value of Brown Crab into D&S IFCA Ports for the 10m and under fleet

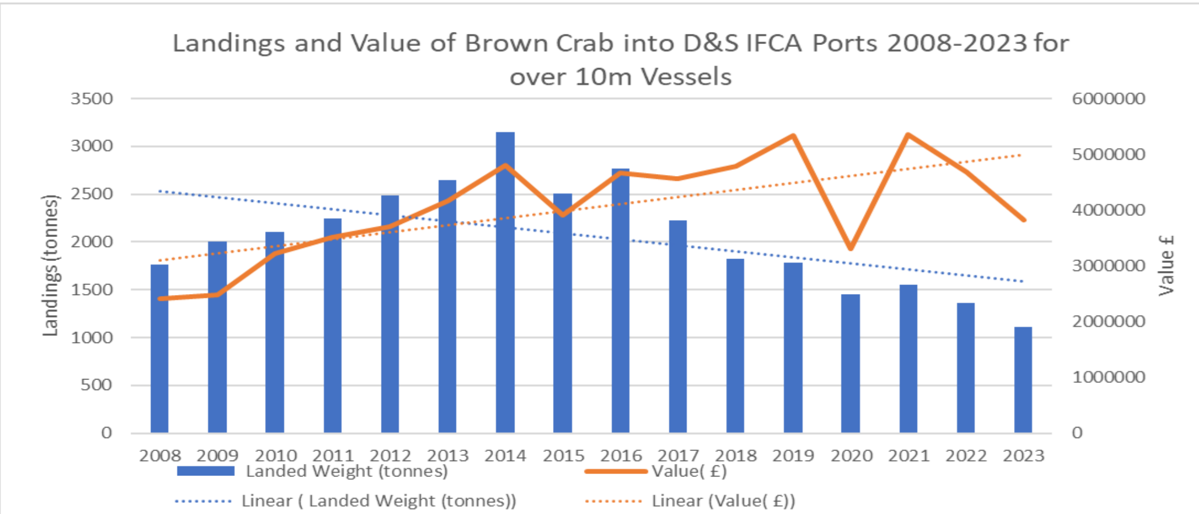

Figure 3 Landings and value of Brown Crab into D&S IFCA Ports for the over 10m fleet.

The decline in crab landings into D&S IFCA's ports is replicated across the South West and nationally. Cornwall IFCA has reported that edible brown crab landings and LPUE have been declining in the pot fishery in Cornwall IFCA District since 2017 as recorded in monthly Shellfish Permit Statistics (CIFCA Summary Statistics Report 2021). Crab landings have been slowly declining in the Isles of

Scilly from 45,365kg in 2019 to 32, 708kg in 2022 (Isles of Scilly IFCA's Stock Status report 2023: Brown Crab (*Cancer pagurus*) (Morcom et al, 2023).

Although the reasons for this are not clear, it is likely due to an increase in pressure from large vivier fishing vessels that have grown in number over the last two decades, in particular since 2015. Other factors may include the increase in the level of overall effort; environmental fluctuations leading to changes in populations of many species, including species such as octopus that predate on crab; poor recruitment into the fishery: potential impacts of capital dredging on the migration of crab from east to west along the English Channel; increase in scallop dredging activity in the Channel from larger vessel impacting crab stocks.

Nationally there has been a decline in landings of crab and the profitability of the crab fisheries. In the evidence statement for the Crab and Lobster Fisheries Management Plan (FMP). Landings and value data for crab and lobster fisheries were analysed for UK vessels operating in English waters. From this analysis there has been an increase in the number of active vessels entering the fishery since 2015 on the back of the increase in landings in 2014, 2015 and 2016 and thereafter a decline in average landings of brown crab. Whilst the figures only went up to 2018 the average crab landings and operating profit to the crab fishery was shown to be in decline since 2017.

Lobster

Figures 10 -12 show the landings of lobster into D&S IFCA ports. The figures for 2023 only go up to the end of November (and therefore are provisional). For all vessels, landings have increased steadily since 2009 as has the value of these landings, with peak landings of 131.74 tonnes in 2022 worth £2.34 million. These data show that whilst the brown crab landings have declined the lobster landings have increased which may indicate that fishers have taken up opportunities to support their income.

The 10m and under fleet landing into all D&S IFCA ports show landings of lobster that have stabilised since 2019 between 52.72 and 55.65 tonnes (not including 2020 where Covid may have had an influence). However, the value of lobster has increased over these years from £622,439 in 2019 to £916,195 in 2022. The trendline for the landings and value of lobster for the 10m and under vessels show that they have been steadily increasing since 2008. When comparing the 10m and under vessels with the over 10m vessels the trend in increase in landings and value is greater for the 10m and under fleet. The over 10m vessels show a much less steep trendline for the landings of lobsters indicating that the landings over the time period are more stable.

Cornwall IFCA reported that landings of lobsters recorded on their shellfish permit returns and figures have fluctuated since 2017 between 150 tonnes and 180 tonnes (CIFCA Summary Statistics Report 2021). Landings per unit effort (LPUE) for lobsters across their District increased from 2016 to 2020 by approximately 45%. In 2021 the total landings and LPUE fell although remained higher than previous years The Isles of Scilly IFCA reported that landings of lobster by Isles of Scilly vessels have shown a steady increase of 9% from 2019 to 2022 (Isles of Scilly IFCA's Stock Status report 2023: European Lobster (*Homarus Gammarus*) (Morcom et al, 2023)). As part of the Crab and Lobster FMP evidence statement it was reported that, for UK vessels operating in English waters, the 10m and under vessels landed more lobsters by volume and value than vessels over 10m. Nationally the lobster landings of the 10m and under vessels fluctuated between 2016 and 2019 between 985 tonnes and 1143 tonnes. A decline was seen in 2020 to 762 tonnes which may have been due to Covid.

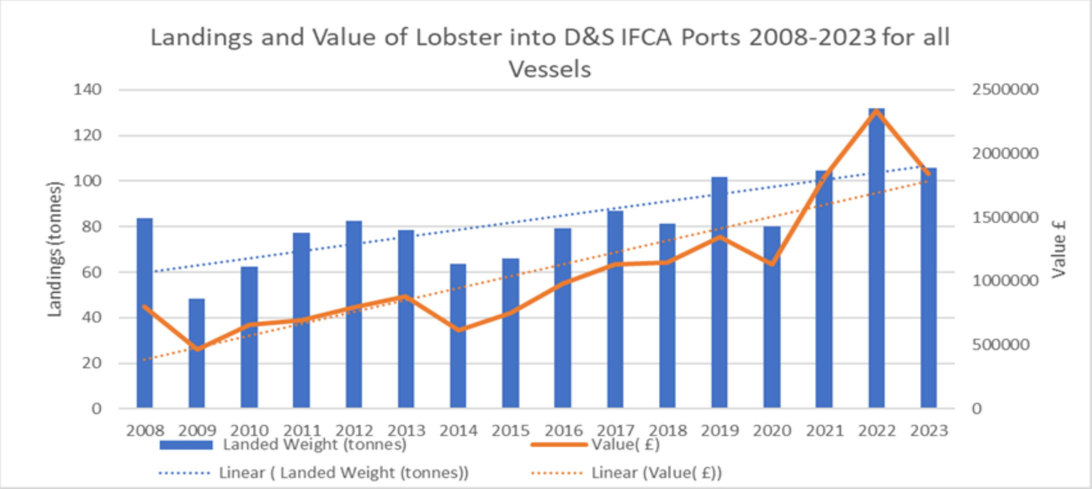

Figure 4 Landings and value of lobsters into all D&S IFCA Ports 2008-2023

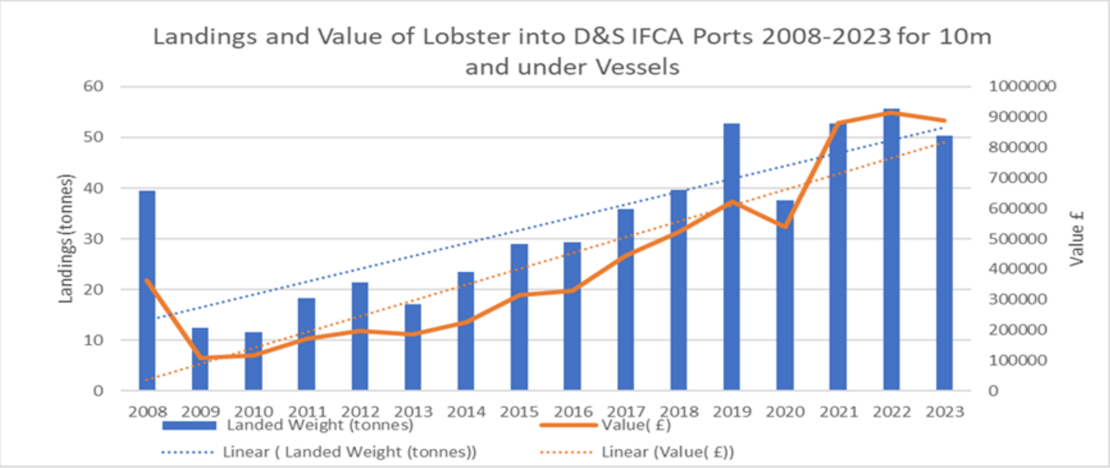

Figure 5 Landings and Value of lobsters for 10m and under Vessels into D&S IFCA Ports 2008-2023

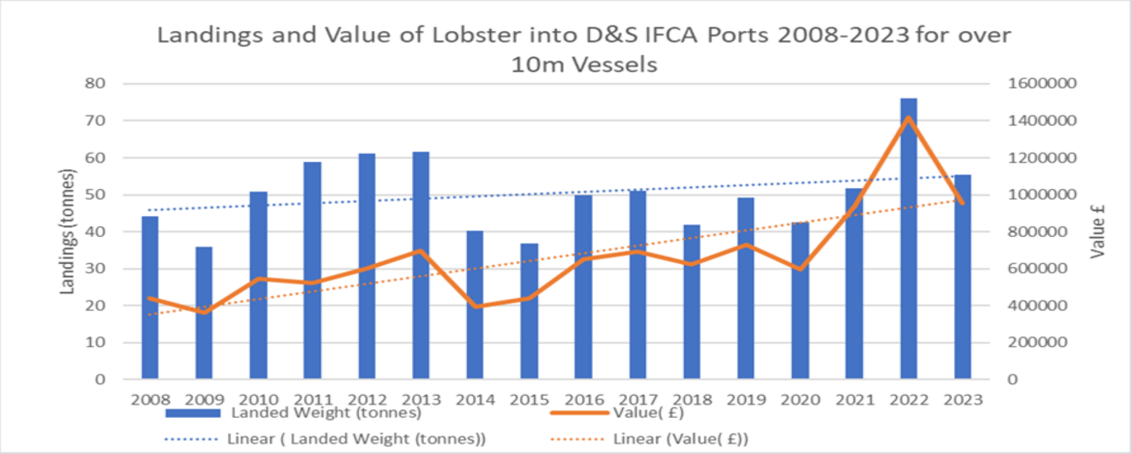

Figure 6 Landings and Value of Lobsters by over 10m Vessels into D&S IFCA Ports 2008-2023

References

[Cornwall IFCA - Monthly Shellfish permit Statistics Analysis – Summary Statistics 2021]

[Isle of Scilly Stock Status Report 2023:Brown Crab] [Isles of Scilly Stock Status Report 2023: Lobster]

Crab and Lobster FMP Consultation - Evidence Statement Annex 1 2023