

Fishing in an ever-busier blue economy – the ‘spatial squeeze’

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CEO, Scottish Fishermen's Federation

SFF Member Associations

The Scottish Fishermen's Federation (SFF) was formed in 1973 to preserve and promote the collective interests of Scotland's fishermen's associations.



Fishing Industry Facts

- Number of people working on Scottish fishing vessels: **4,737**
 - For every job at sea, there are **5 jobs ashore**
- Number of active Scottish registered fishing vessels (2020): **2,088**
 - Under 10 (1556) vs over 10 (532)
- **399,000 tonnes** of fish/shellfish landed by Scottish vessels (2020)
 - Gross value of **£488 million**
 - By value, mackerel the most valuable, then *Nephrops*, haddock 3rd
- Biggest ports in the UK for...
 - Shellfish: Fraserburgh
 - Whitefish: Peterhead
 - Pelagic: Peterhead, Lerwick

All shapes and sizes....



4 METRES



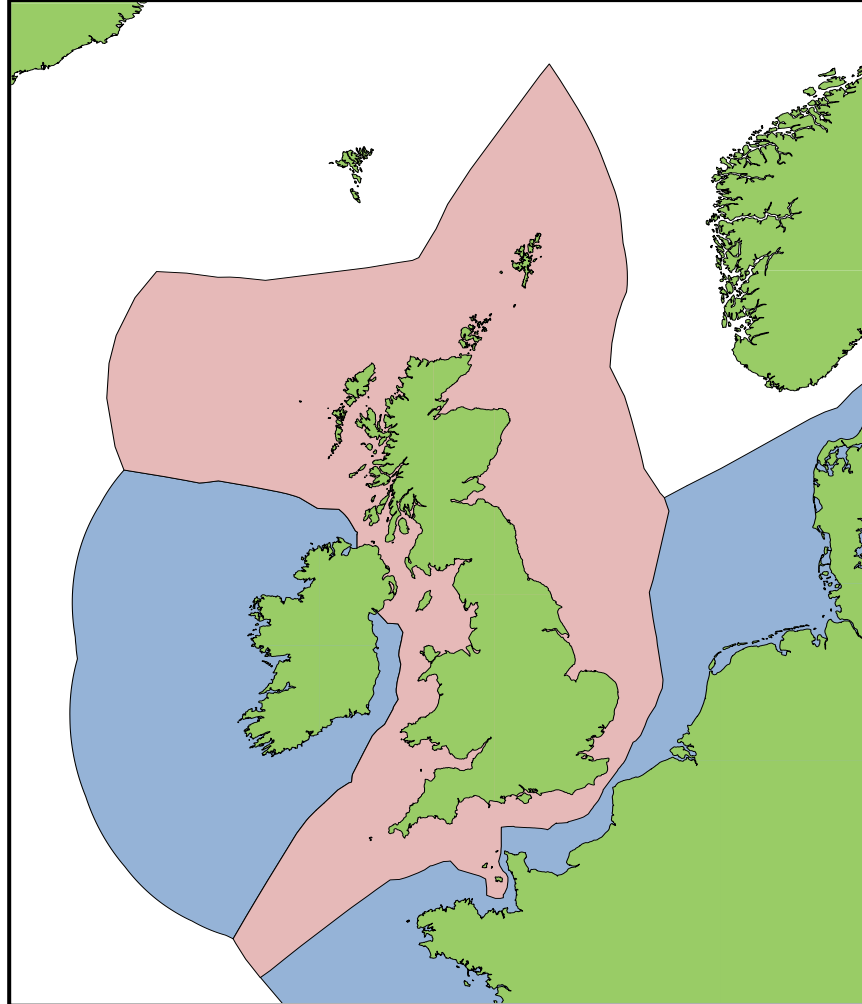
80+ METRES

.... and there's many ways of doing it

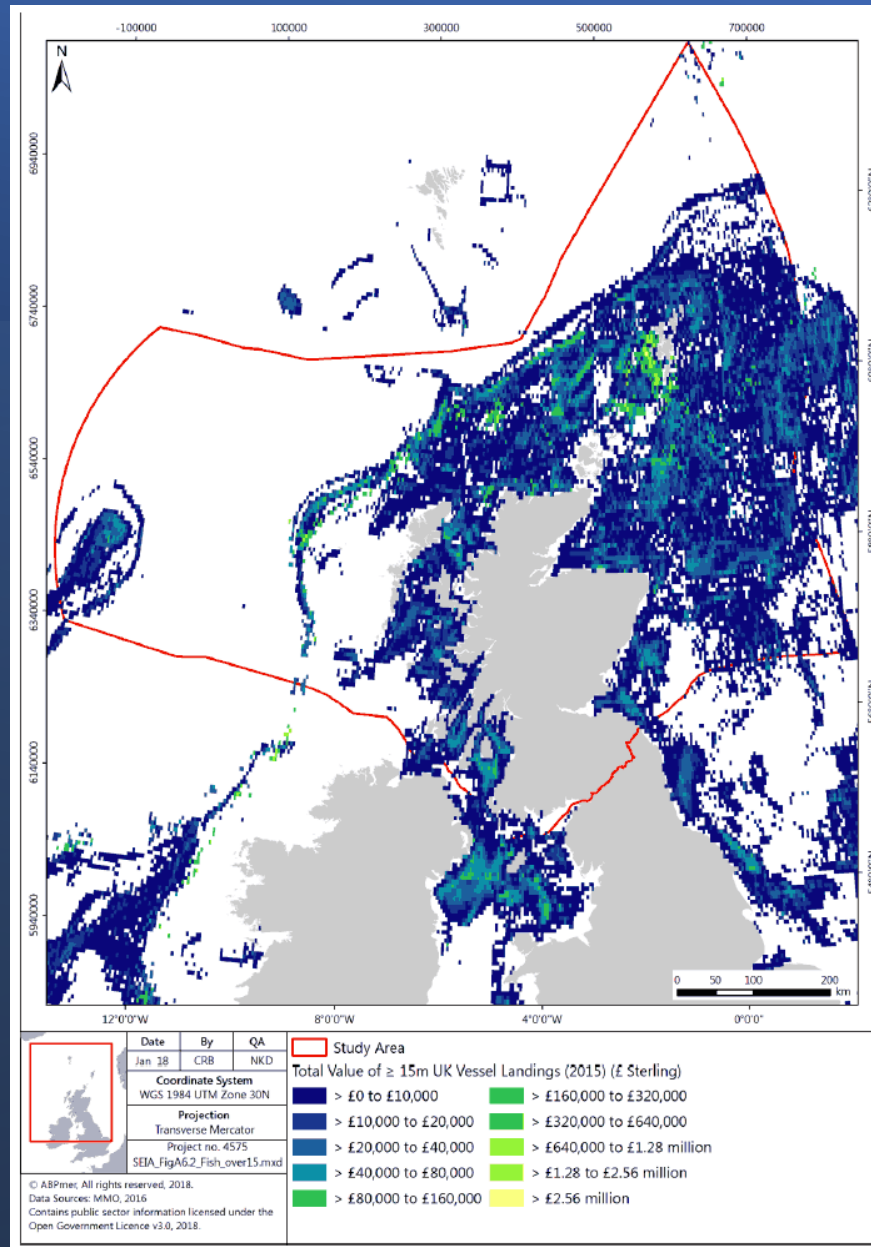
- Static gear
- Seine netting
- Single trawlers
- Pair trawlers
- Twin trawlers
- Dredgers
- Pelagic

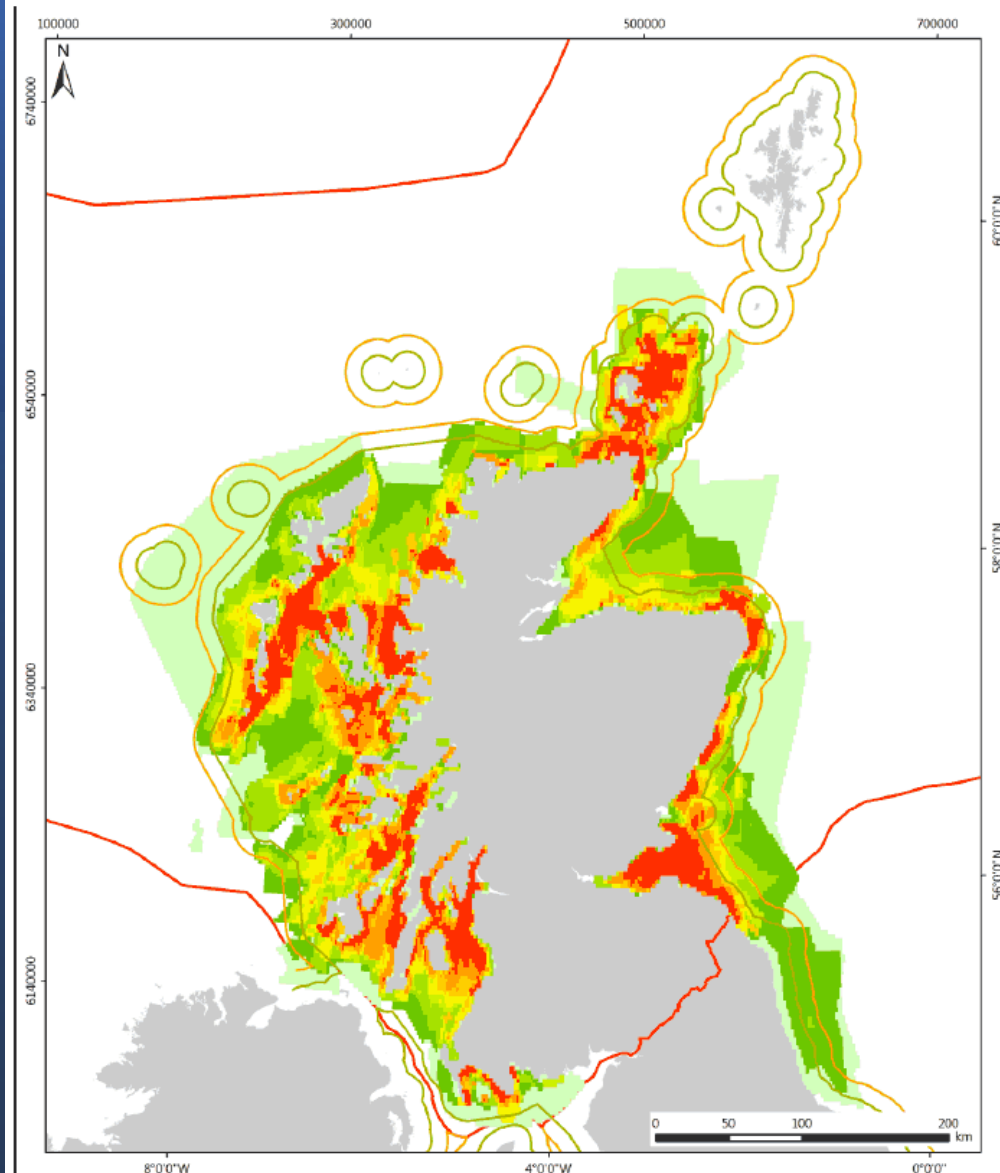



The UK's EEZ











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Date	By	QA
Jan 18	CRB	NKD

Coordinate System
WGS 1984 UTM Zone 30N

Projection
Transverse Mercator

Project no. 4575
SEIA_FigA6.3_Fish_under15.mxd

Study Area

6 nm Limit

12 nm Territorial Sea Limit

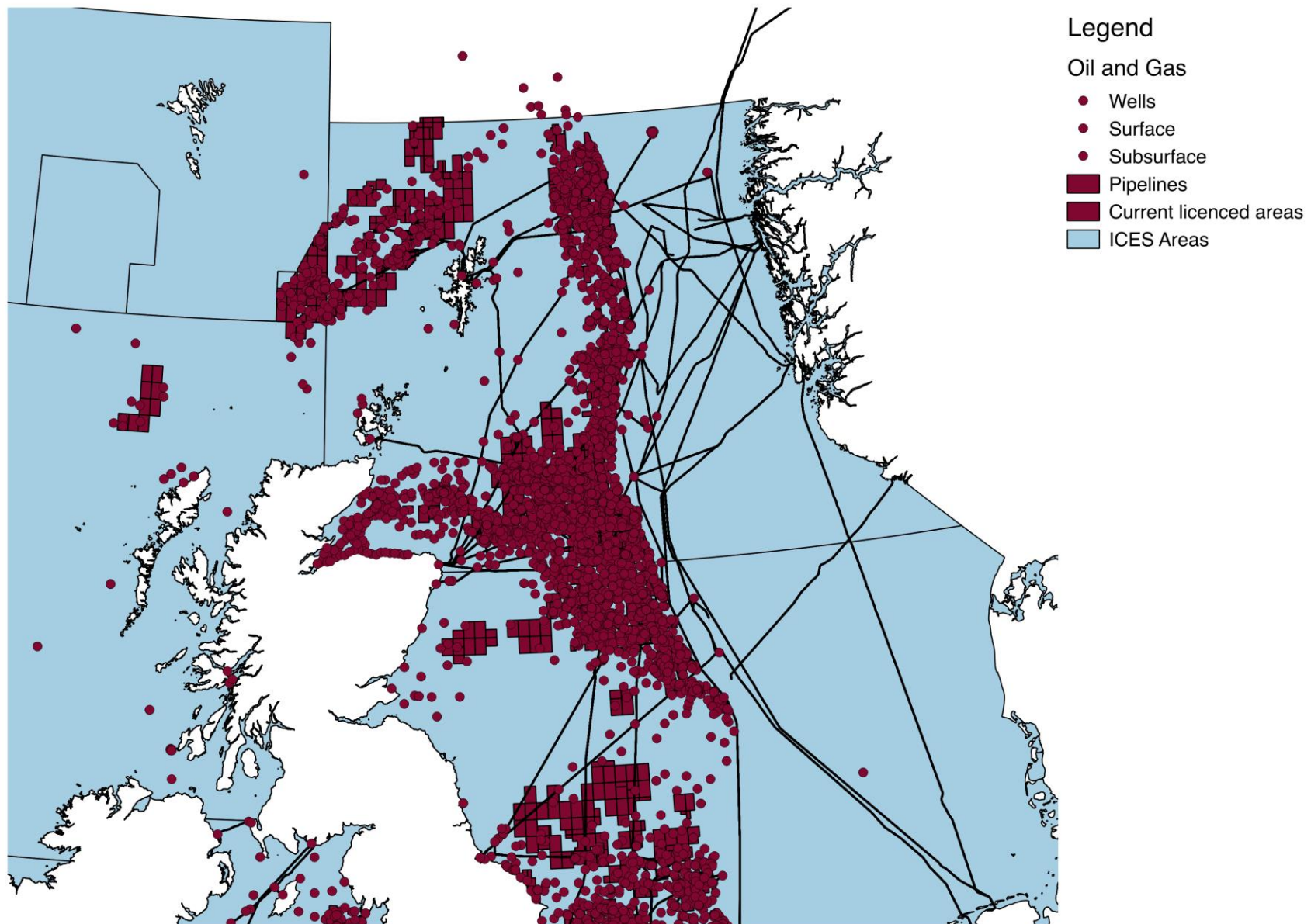
Inshore Fishing (Scotmap) Average Annual Monetary Value (£) 2007-2011

 < 1	 664 to 884	 2,211 to 2,873	 5,306 to 6,631
 1 to 221	 885 to 1,326	 2,874 to 3,536	 6,632 to 8,841
 222 to 442	 1,327 to 1,768	 3,537 to 4,420	 8,842 to 12,377
 443 to 663	 1,769 to 2,210	 4,421 to 5,305	 12,378 to 56,364

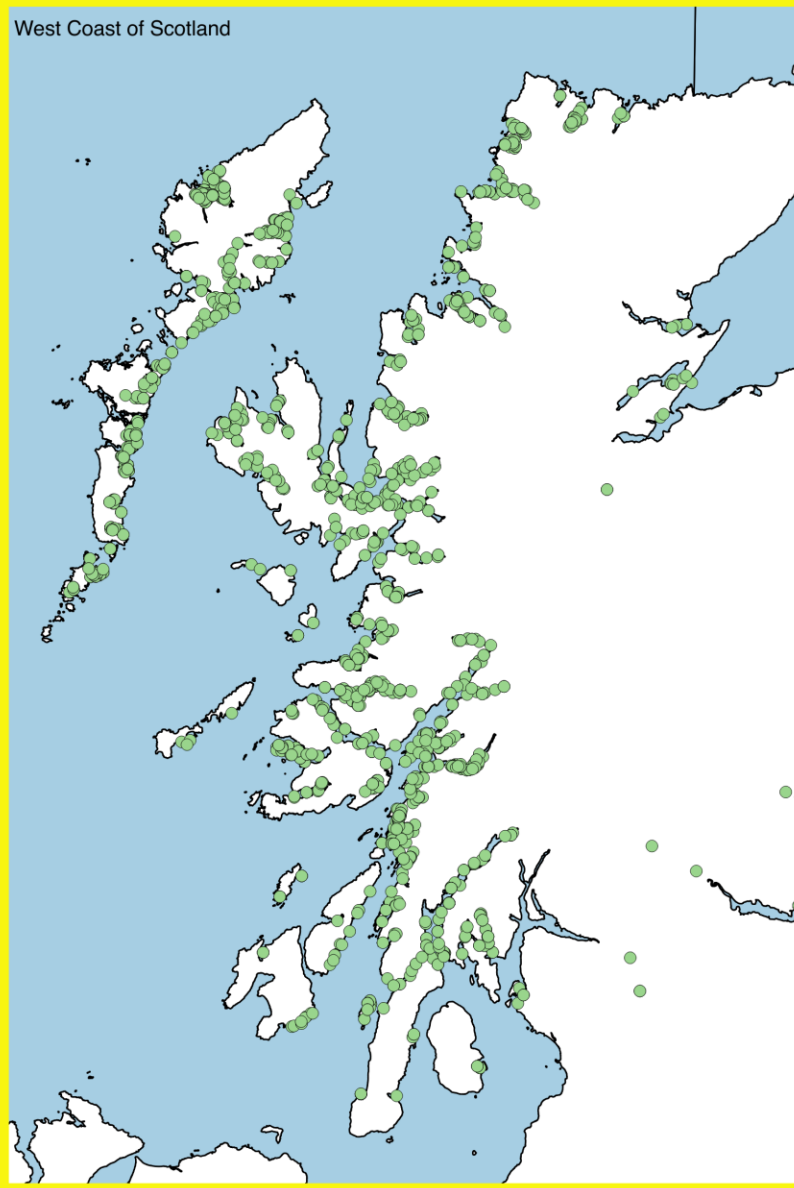
But we're not the only fish in the sea.....

- Oil and gas – exploration, production, decommissioning
- Marine renewables
- Subsea cables
- Conservation sites – marine protected areas, HPMAs
- Aquaculture – fish, shellfish, *seaweed*
- Marine tourism and recreation
- Other maritime traffic
- Dredging and mineral extraction

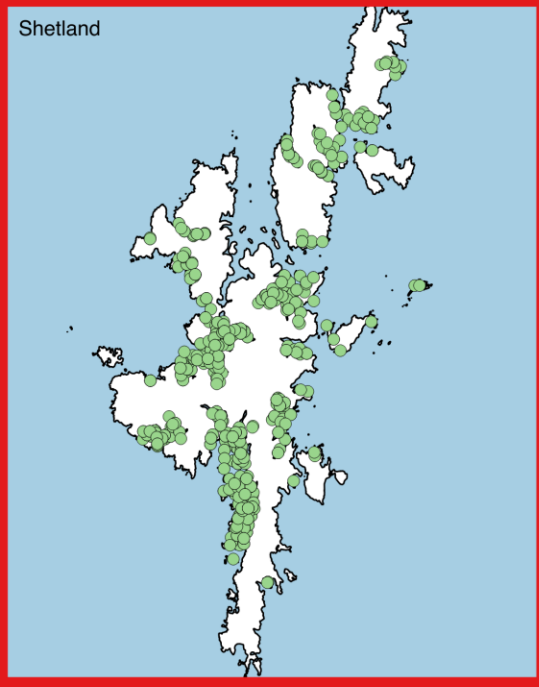
So how can we co-exist?



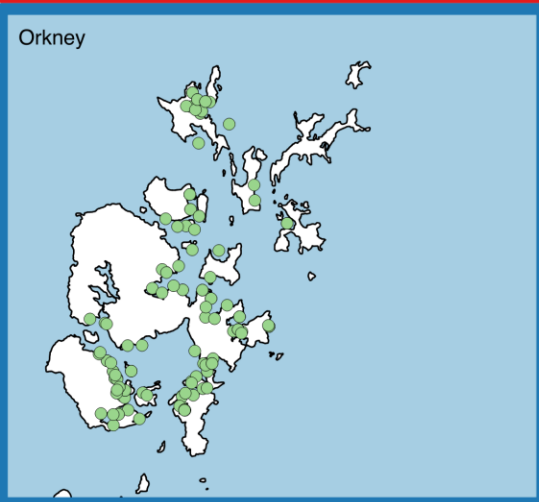
West Coast of Scotland



Shetland

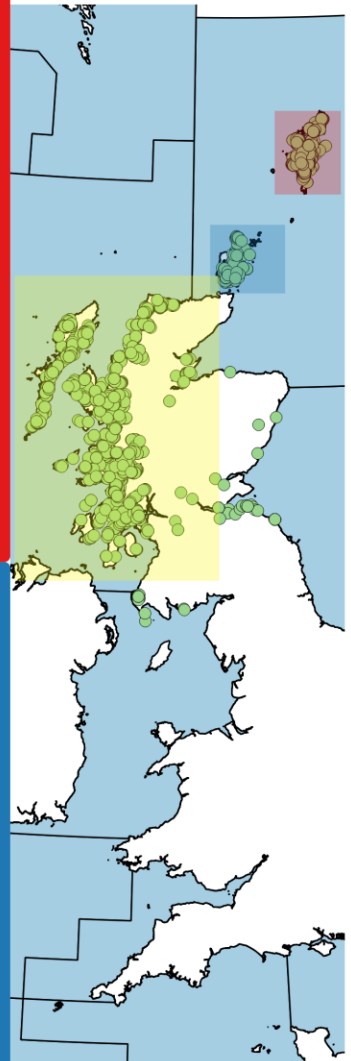


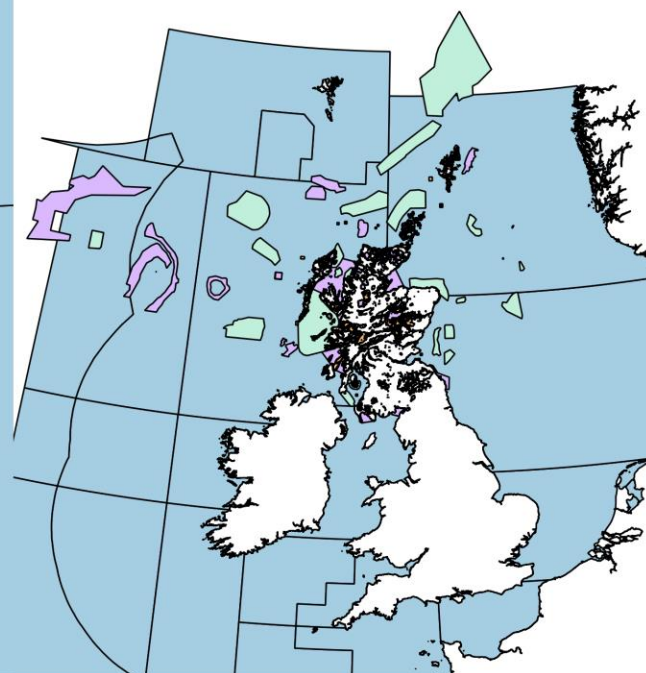
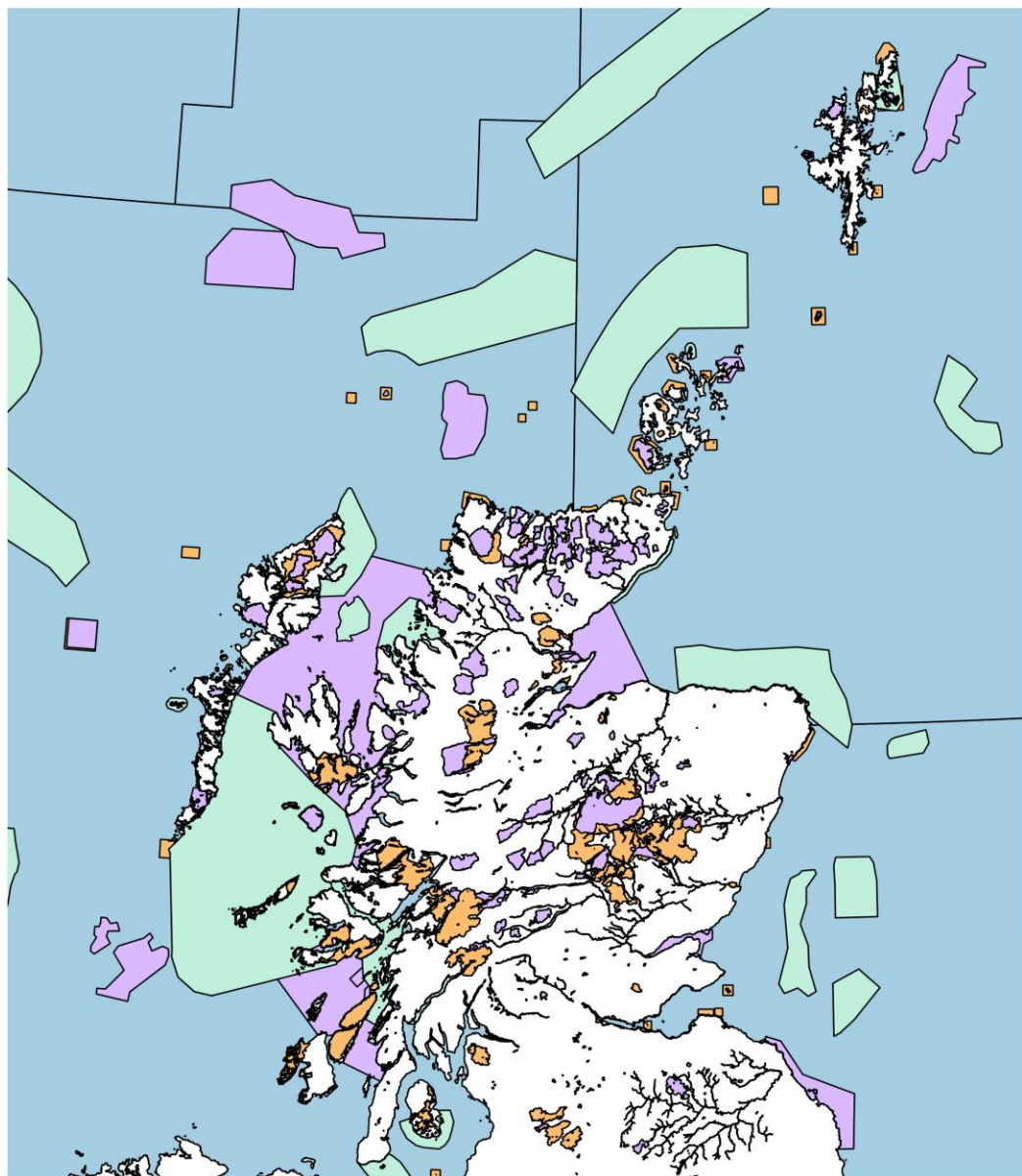
Orkney



Legend

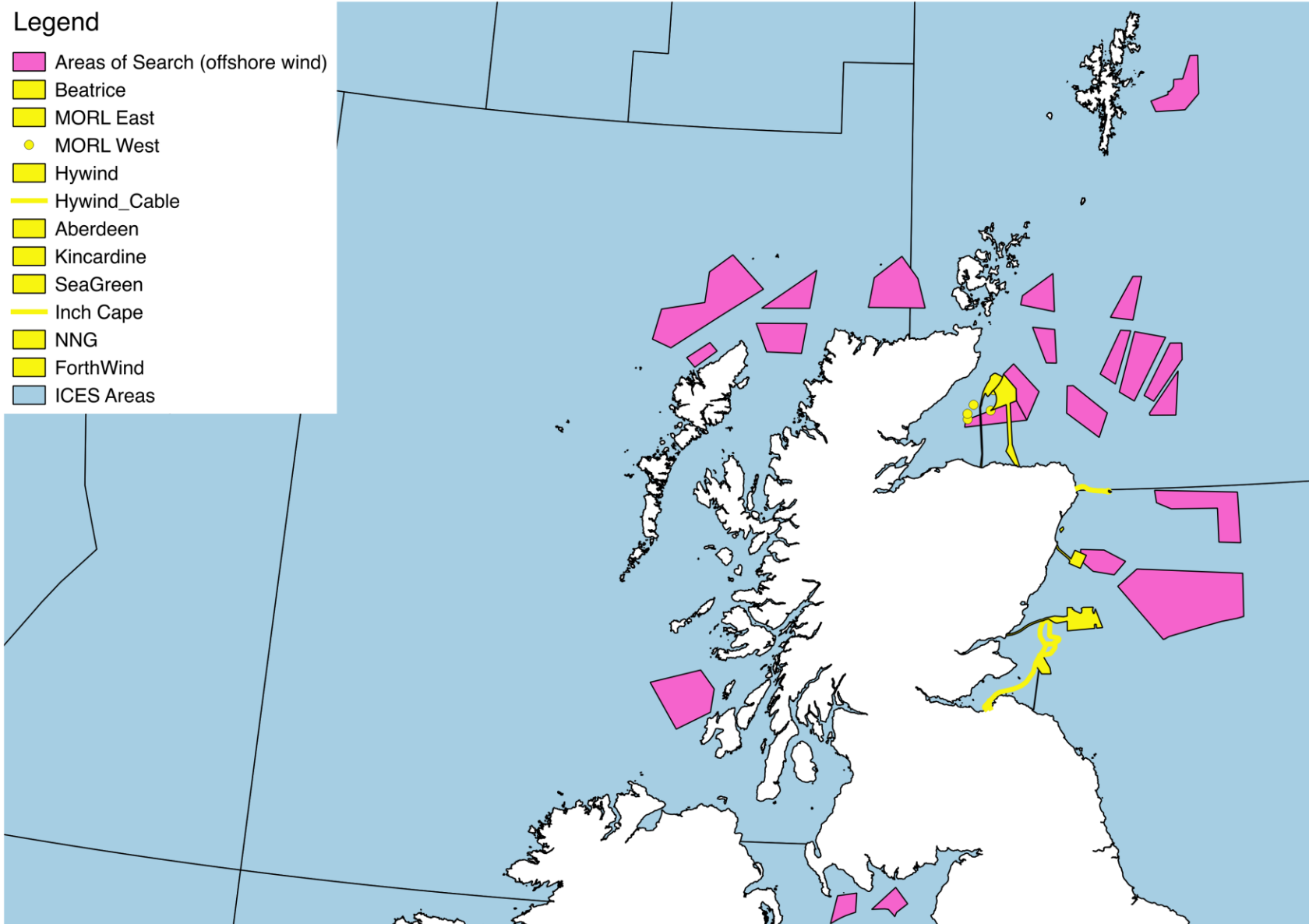
- Active aquaculture sites
- ICES Areas

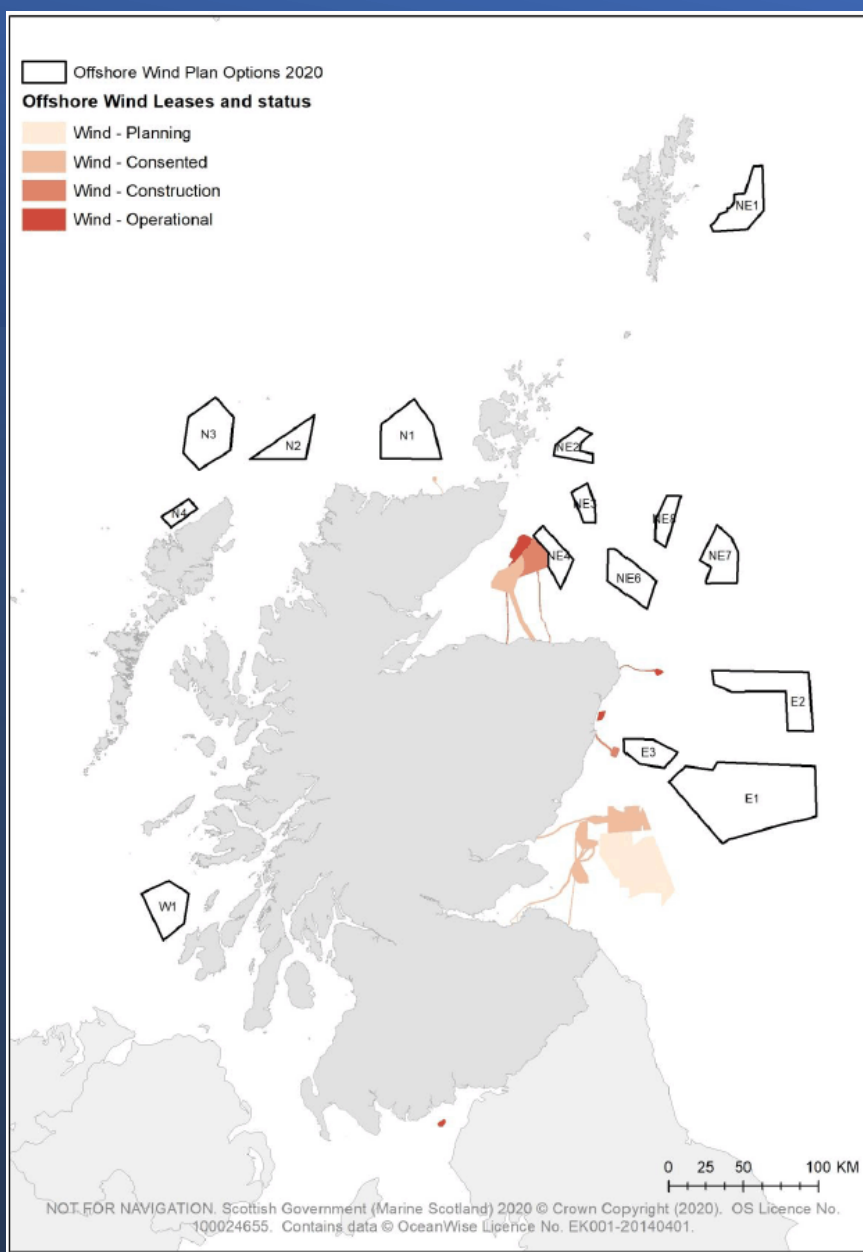


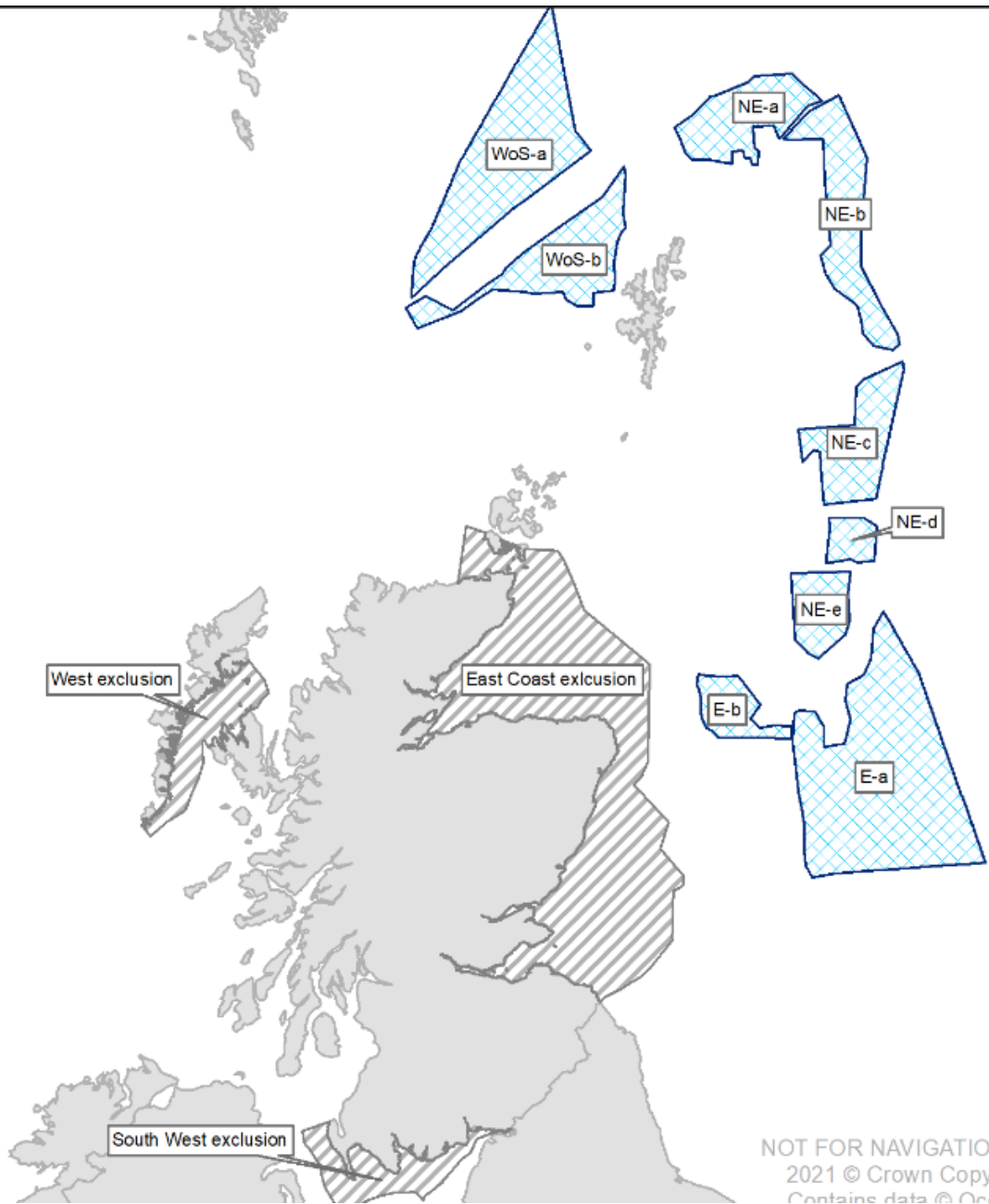


Legend

- Areas of Search (offshore wind)
- Beatrice
- MORL East
- MORL West
- Hywind
- Hywind_Cable
- Aberdeen
- Kincardine
- SeaGreen
- Inch Cape
- NNG
- ForthWind
- ICES Areas







- ScotWIND - INTOG
 - Sectoral Marine Plan for Offshore Wind for **Innovation and Targeted Oil and Gas Decarbonisation**.
 - Offshore wind areas to electrify of oil and gas infrastructure in Scottish waters (out to 200 NM).
 - Also examine potential options for smaller (<100 MW) innovation or test and demonstration projects.

Next steps (expected)

Early 2022: ScotWIND leases given to developers

2022 – 2026: developers working on their developments. EIAs, turbine layout, cable routes, etc.

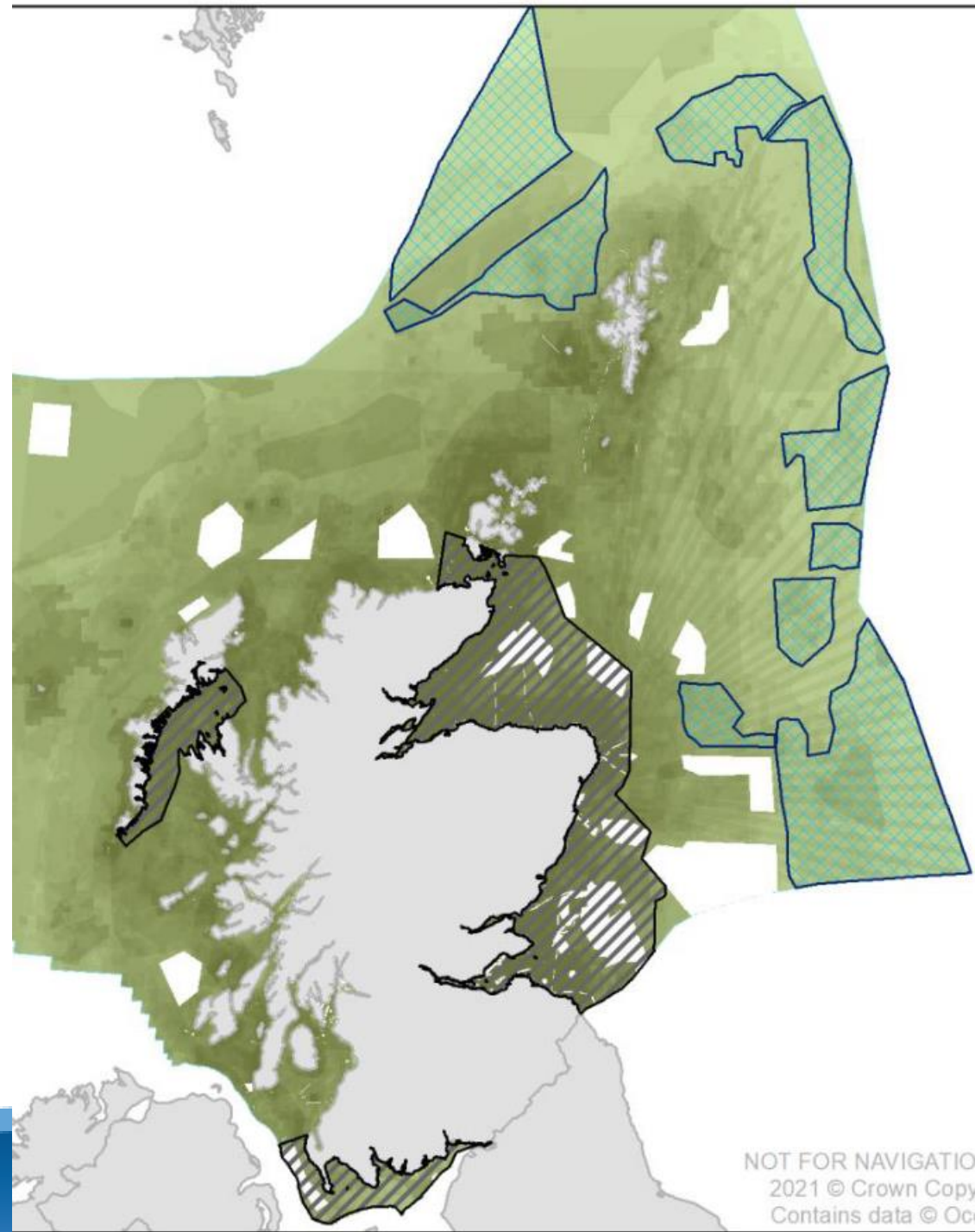
2026 : first offshore construction.

2030 – 2080: operational

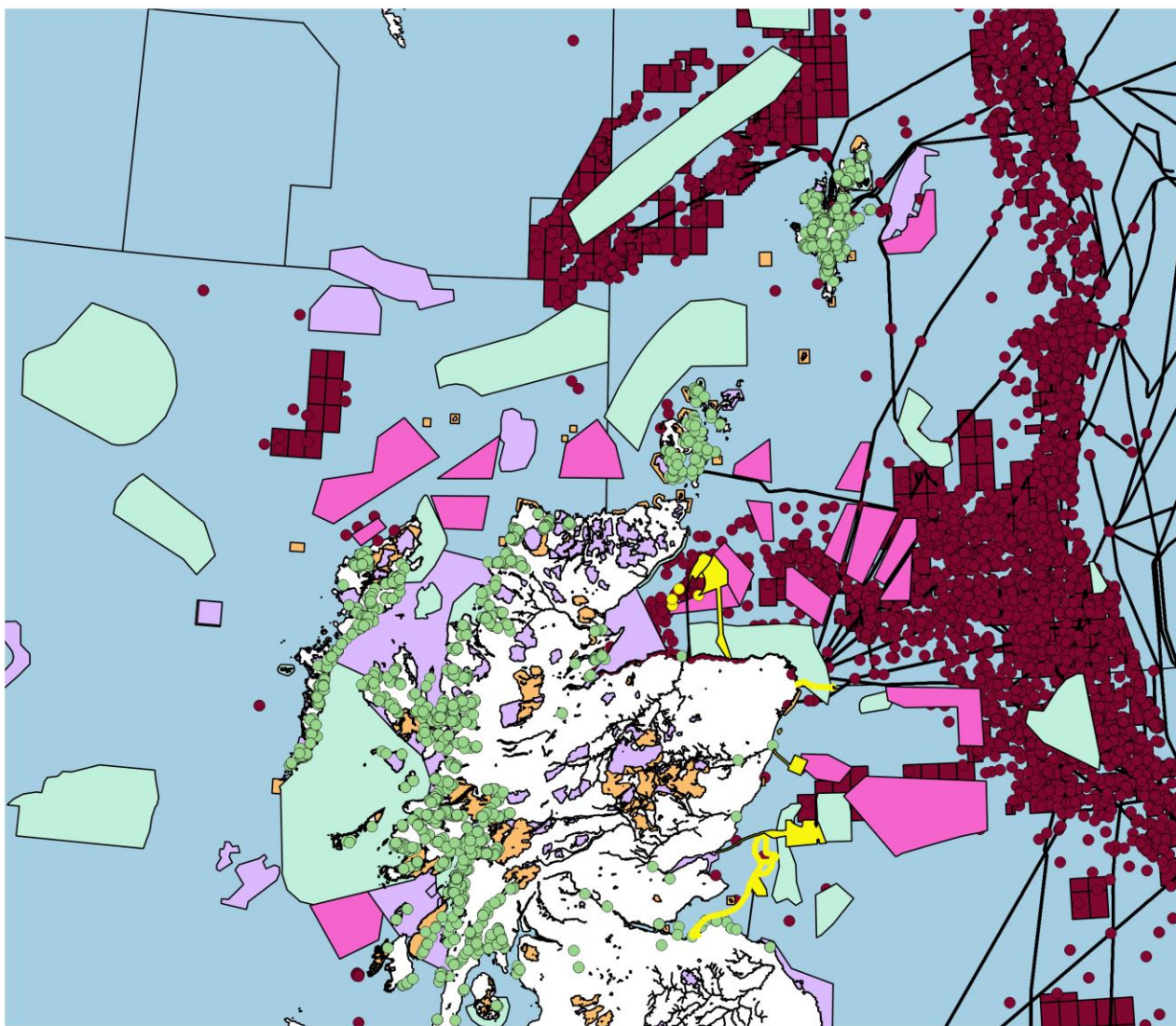
ScotWIND target goal: 10 GW

UK target goal: 75 GW

New round every 2 years



NOT FOR NAVIGATION
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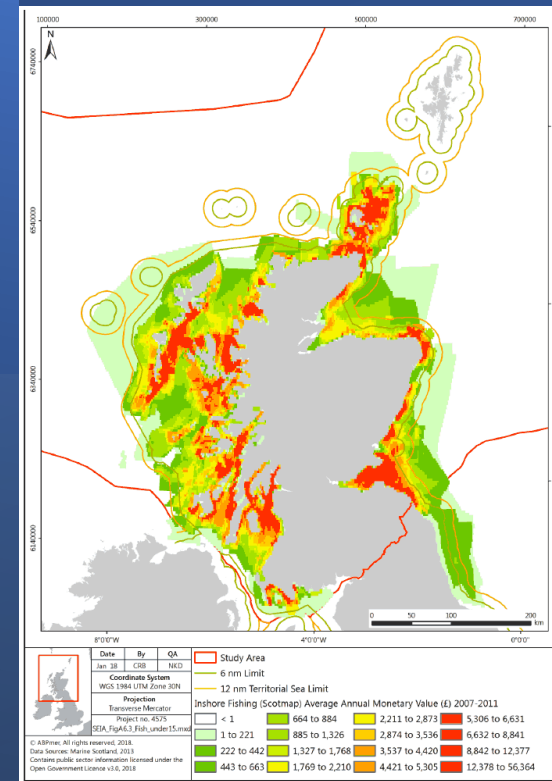
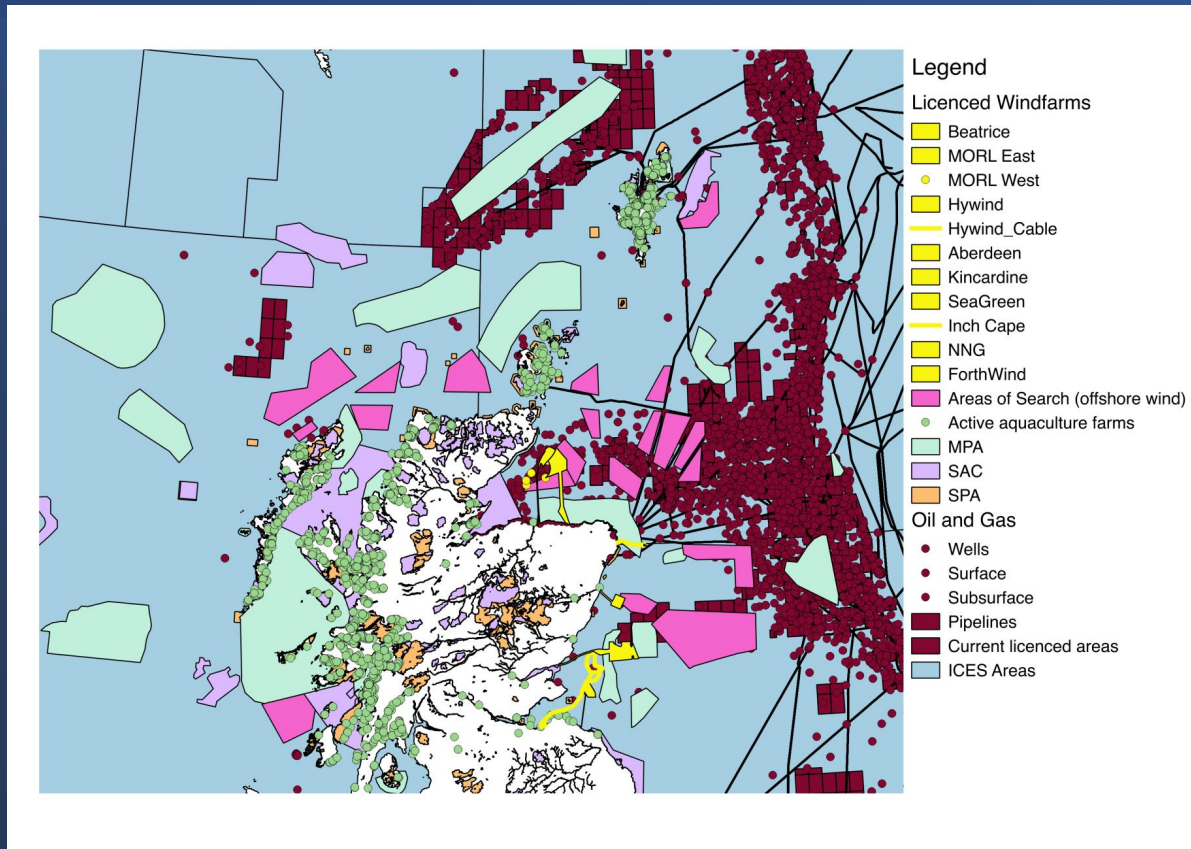
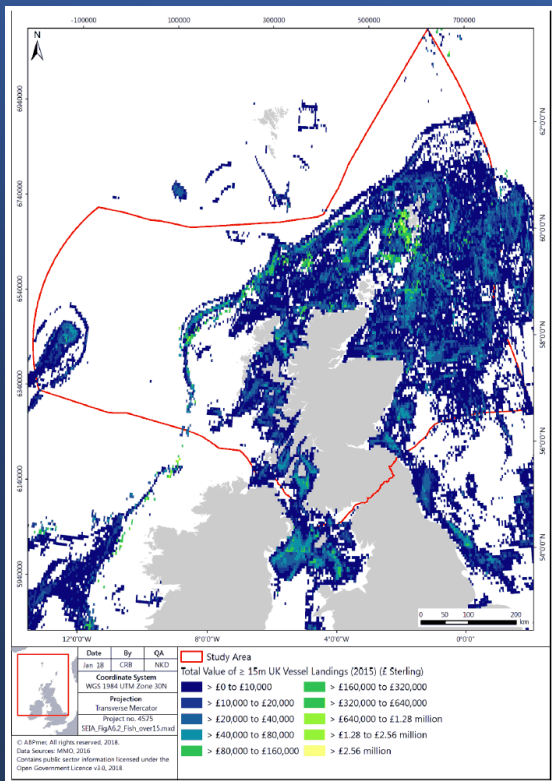
Legend

Licenced Windfarms

- Beatrice
- MORL East
- MORL West
- Hywind
- Hywind_Cable
- Aberdeen
- Kincardine
- SeaGreen
- Inch Cape
- NNG
- ForthWind
- Areas of Search (offshore wind)
- Active aquaculture farms
- MPA
- SAC
- SPA

Oil and Gas

- Wells
- Surface
- Subsurface
- Pipelines
- Current licenced areas
- ICES Areas



Decarbonising Scotland

“By 2030, 50% of all Scotland’s energy needs will come from renewables”

Current offshore wind situation

915 MW built

4.1 GW consented

10 GW ScotWIND target goal

UK target goal: 75 GW

Of which probably >75% in Scottish waters (≈55 GW)

Marine renewables necessary for net-zero – but presents real spatial challenges for fishing

CLIMATE CHANGE PLAN

Third Report on Proposals and Policies 2018-2032
Summary Document



Impact of offshore windfarms on different types of fishing

Static gear – least affected, but not unaffected

Seine netting – **almost impossible** within a windfarm

Single trawlers – **difficult** within a windfarm

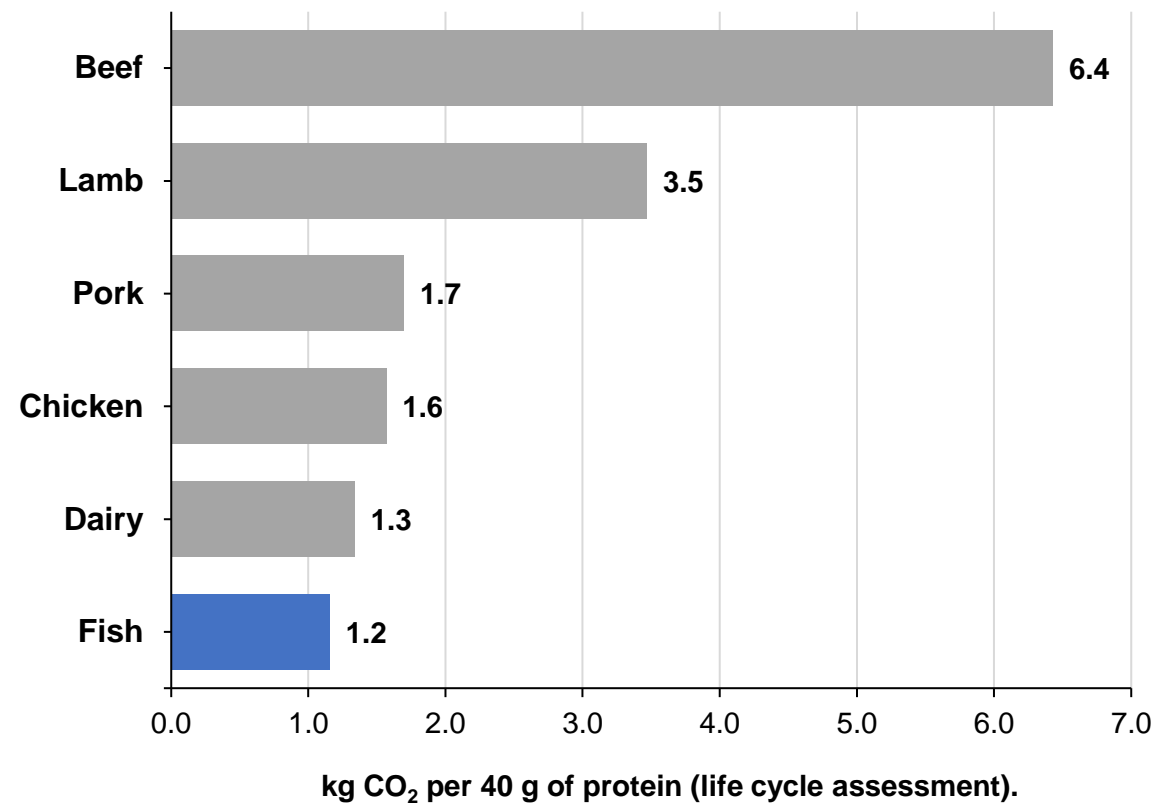
Pair trawlers – **almost impossible** within a windfarm

Twin trawlers – **difficult** within a windfarm

Dredgers – **difficult** within a windfarm

Pelagic – **impossible** within a windfarm

Fishing – also part of reaching net zero



Summing Up:

- The spatial squeeze is already happening – and is going to get much tighter
- No one sector has any more ‘right’ to Scotland’s marine space than another
- But we do need *fair and equitable* marine planning for co-existence
- Co-existence must allow sectors to remain viable – ‘fishing on a postage stamp’ is not viable
- Fishing produces low carbon, high protein healthy food – we are also part of the routemap to net zero!