



COMMERCE AND EMPLOYMENT

A STATES OF GUERNSEY GOVERNMENT DEPARTMENT



COMMERCE AND EMPLOYMENT DEPARTMENT

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Sea Fisheries Economic and Statistical Report for 2004

1. Introduction	2
2. Landings	3
3. Analysis of Shellfish Landings	4
4. Focus on Bass	6
5. The Fleet	8
5.1 The Alderney Fleet	9
5.2 The Sark Fleet	9
6. Fishing Effort	10
6.1. Pots in Use	11
6.2. Investment in Pots	12
6.3. Pot Lifts	12
6.4. Effort on Finfish and Molluscs	14

* **Cover Picture**- Local boats congregate over the Boue Blondel, the Bass fishery there attracting much publicity in 2004.

1. Introduction

Statistics presented in this report were compiled using logbook data, which for 2004 was compulsory for all under ten metre (32'9") GU licenced vessels, over ten metre vessels having been required to complete logbooks under EU law for many years. The Bailiwick fleet is dominated by smaller day boats and accurate data regarding the composition and amount of catches and the types and amount of effort employed from these boats is crucial for managing fisheries resources both locally and at a European level. The benefit of the logbook scheme will be fully realised once several years data have been obtained, allowing long term trends in the industry to be recorded. Our compulsory under ten metre logbook is the first of its kind in the UK and it is expected that several other jurisdictions will follow suit in the near future.

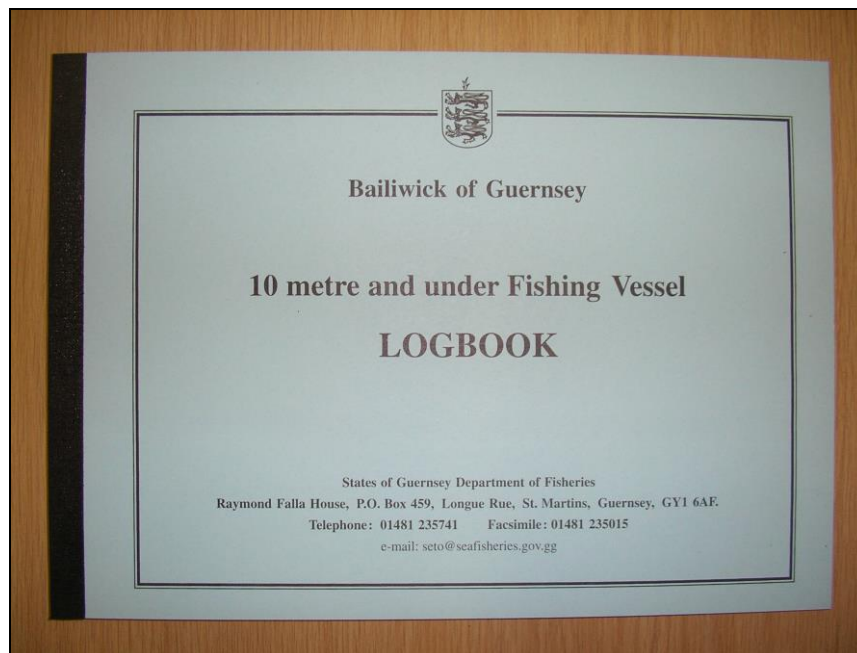


Fig1: The Bailiwick of Guernsey <10 m logbook, data from which has improved the reliability of our fishery statistics.

It is important to note that none of the information presented in this report includes the recreational sector which for angling can represent significant effort and landings for certain species. For example there is good evidence that visiting charter anglers removed as much turbot as that recorded by our licensed fleet in 2004 (7 tonnes) and this still excludes the turbot take by all other recreational angling vessels based in the Bailiwick.

The Boue Blondel Bass fishery was a significant event during the first few months of 2004 attracting much publicity and included in this report is a separate analysis of the catches taken at Boue Blondel in context with total Bailiwick bass landings and the latest Bass stock assessment from the International Council For The Exploration Of The Seas (ICES)

2. Landings

Table 1: Landings and approximate value of major target species taken by GU registered vessels 2002-2004.

Species	Landings 2004 (tonnes)	Approx Value (£000's)	Landings 2003 (tonnes)	Approx Value (£000's)	Landings 2002 (tonnes)	Approx Value (£000,s)
Anglerfish	0.9	3.2	1.9	6.6	7.9	27.7
Bass	127.8	639	49.2	246	43.8	219
Black Bream	49.9	50	131.3	131	28.9	29
Brill	9.8	78.5	9.4	75.2	10.6	84.8
Cod	1.0	2	3.0	6	3.1	6.2
Conger ⁽¹⁾	22.4	10 ⁽³⁾	23.2	2	No data	-
Crayfish	1.2	21.6	1.3	23.4	1.4	25.2
Cuttlefish ⁽²⁾	4.5	1.6	5	3	11.3	10
Dogfish ^{(1) (2)}	12.9	9	45	35	36	28
Edible Crab ⁽⁵⁾	899	1215	885	1194	856	1155
Grey mullet	1	0.5	1.1	0.6	1.9	0.9
Gurnard ⁽²⁾	3.6	1.1	15	11.25	25.2	18.9
John Dory	0.5	3.5	1.1	7.7	2.1	14.7
Lobster	60.5	725.4	49	588	41	492
Ling	1.1	0.7	No data	-	No data	-
Mackerel	5.2	2	No data	-	No data	-
Plaice	2.7	8	1.7	5.1	1.9	5.7
Pollack	35.9	43	21.4	25.7	26.7	32
Pout ⁽²⁾	1.1	0.4	2.3	1	5.0	2.5
Ray	117.4	173.9 ⁽⁴⁾	163	239.3	182.7	268
Red mullet	10.1	50.2	10.3	51.5	11.7	58.5
Sand Sole	1.1	3.2	1	3	0.9	2.7
Sandeel ⁽⁶⁾	43.2	-	37.9	-	39.0	-
Scallop	107.6	376.7	89.2	312.2	77.9	272.7
Smoothound	11.3	22.6	No data	-	No data	-
Sole	6.0	48.1.	4.8	38.4	5.7	45.6
Spider ⁽⁵⁾	99	115	146	171	131	153.2
Squid	0.4	2.0	0.9	4.5	4.2	21
Turbot	7.0	55.7	4.3	34.4	3.5	28
Tope	26	45	No data	-	No data	
Wrasse ⁽¹⁾⁽²⁾	5.5	-	No data	-	No data	-
Total	1675.6	3701.9	1703.3	3215.9	1559.4	3001.3

1. Landings not complete as many are caught and used for bait during potting operations and never come ashore.
 2. Those landed for bait from trawling /lining/netting not recorded.
 3. Conger targeted by several vessels and landed into Cherbourg led to an increase in value for conger landings.
 4. Includes ray back bait value
 5. Value based on landings adjusted for mortality (-10%)
 6. Sandeel landings all sold locally for bait, value not shown.
- * No data where information is absent, unreliable or incomplete.

Table 1 shows the landings of principal finfish and mollusc species by GU registered vessels 2002 – 2004. The large increase in bass landings for 2004 reflects the high abundance of this species in local waters in 2004 with the line fishery at Boue Blondel accounting for around 55 tonnes (see section 4). Bream landings were significantly lower than in 2003 and this was due to the tragic loss of our largest trawler late in that year. This loss also resulted in Ray landings being notably lower in 2004 than in previous years, with two other larger vessels switching to pelagic trawling in the first half of 2004 also contributing to the reduction in Ray landings. This highlights the influence single large vessels have on the species mix and overall amount of fish landed in the Bailiwick. An encouraging development last year was that several vessels targeted Conger, Smoothounds and Tope with longlines, receiving respectable prices on the French market.

3. Analysis Of Shellfish Landings

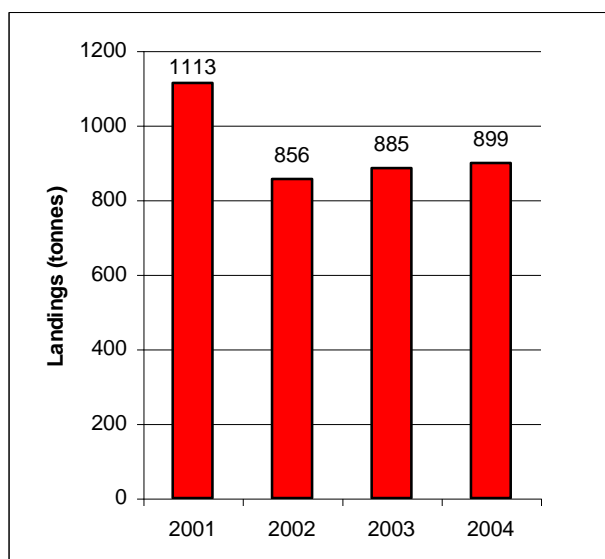


Chart 1: Edible crab landings 2001-2004

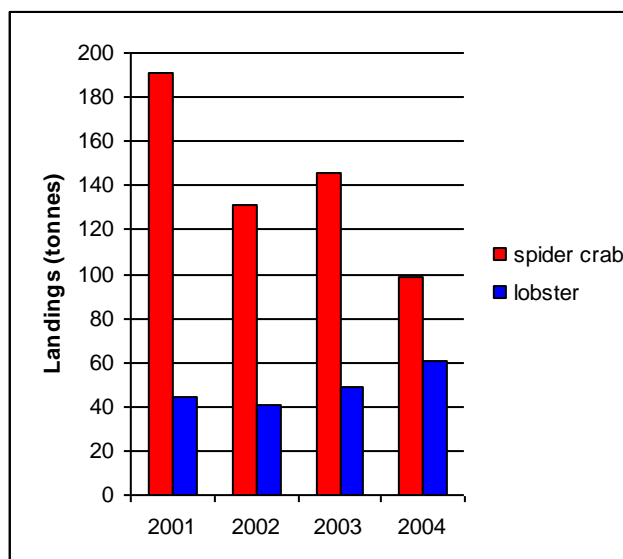


Chart 2: Spider crab and lobster landings 2001-2004

Charts 1 and 2 show the crustacea landings (excluding crayfish) 2001-2004. Edible crab landings have been relatively stable over the last three years with several larger crabbers having left the fleet in 2001. Although it is not possible to identify a reduction in potting effort through the logbook data at present, many skippers have switched to targeting wetfish due to the poor marketing prospects that persist for shellfish. Prices for edible crab show no sign of improving with expanding pot fisheries in Ireland and the East coast of the UK landing catches into the Continent. There has been a decline in spider landings in recent years and this is partly due to a reduction in effort although many skippers regarded 2004 as the poorest spider season for many years with only 99 tonnes landed. Lobster landings last year totalled 60.5 tonnes, although the apparent large increase over previous years is likely to be due to missed data for local sales in earlier years. For lobster, the under ten metre logbook returns have certainly helped to improve the reliability of landings data in 2004.

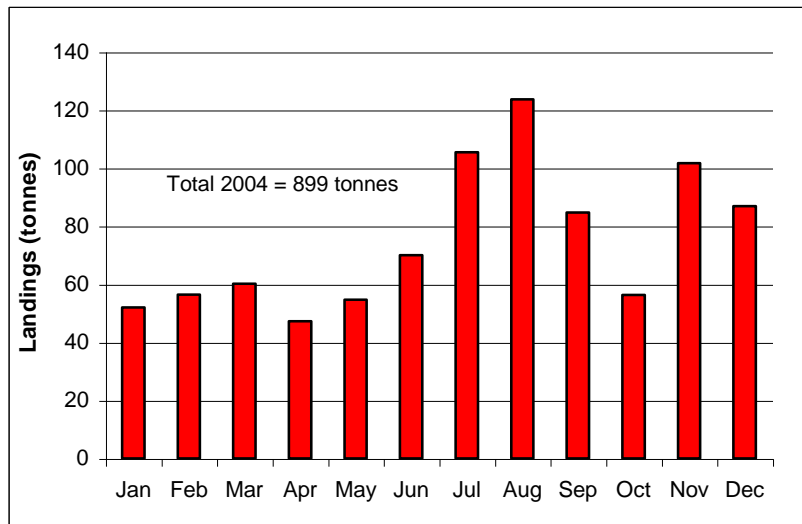


Chart 3: Monthly Edible Crab landings 2004

Chart 3 shows edible crab landings by month. Highest landings are made in the summer months following the spring moulting period when many animals are soft and unmarketable, with November and December showing strong landings as fishermen look to the Christmas market when prices are traditionally higher.

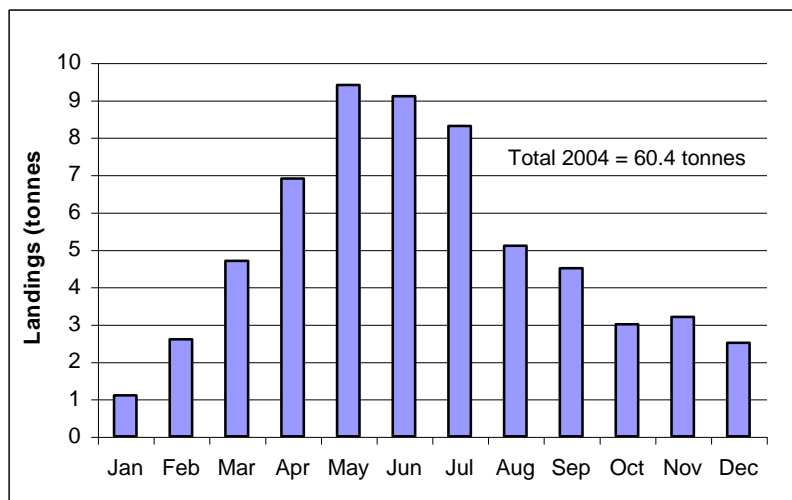


Chart 4: Monthly Lobster landings 2004

Chart 4 shows lobster landings by month. Lobster landings are higher during the spring and early summer and this broadly reflects the higher feeding activity of lobsters as sea temperatures rise. The increase in supply during the Spring often brings a sharp reduction in first sale price. Landings then fall away in the second half of the year, probably due to localised depletion as lobsters are removed from the best holding ground.

Chart 5 shows annual spider landings with peak landings in May as the seasonal inshore migration takes place. Adult spiders leave coastal waters in the Autumn and overwinter in deeper water to the South and West of Guernsey. For reasons not entirely clear, the spring run of spider has declined in Guernsey waters in recent years. At the same time spider crab have expanded their range northward with high numbers now regularly appearing off South Wales.

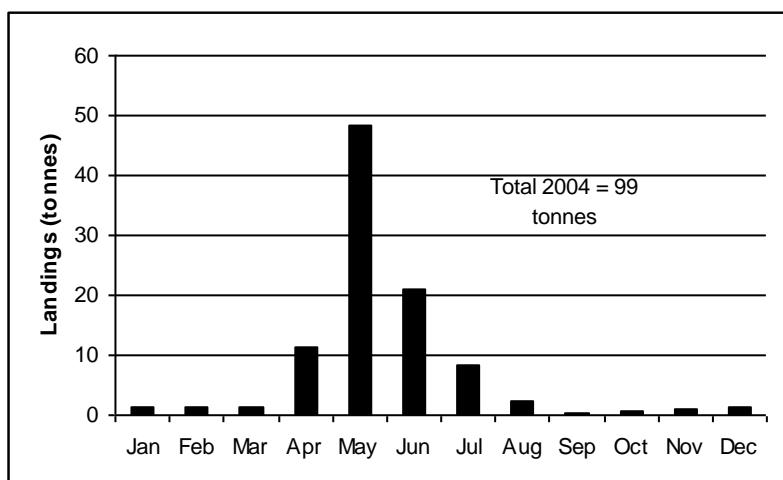


Chart 5: Monthly Spider Crab landings 2004

4. Focus On Bass

Table 2 shows the 2004 Bass landings by fishing method and the number of vessels that contributed to the landings each month. The months involving landings from Boue Blondel are highlighted in green.

Table 2: Bailiwick Bass landings by Fishing Method. Boue Blondel landings highlighted in green.

2004	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals (kg)
Long line	34	273	494	695	2628	2579	2999	2559	1964	950	643	484	16302
Angling	282	3606	15013	33854	2294	3632	2742	2770	2382	520	281	110	67486
Nets	1085	410	425	2725	3	47	12	134	32	250	1121	1021	7265
Trawling	6302	14280	8664	2592	895	48	70	37	72	99	45	3643	36747
Potting		4			2	15	26	14	13	16	7		97
Totals	7703	18573	24596	39866	5822	6321	5849	5514	4463	1835	2097	5258	127897
Boats active	19	28	30	45	47	54	55	56	56	31	26	27	
over 10m	4	5	6	7	3	5	3	4	5	2	4	5	
under 10m	15	23	24	38	44	49	52	52	51	29	22	22	

Angling contributed most to the total with 67.5 tonnes or 53% of the annual landings with trawling responsible for 29%, the remainder taken by netting and longlining. 49.5 tonnes were directly attributable to the Boue Blondel Fishery which represents 39% of the total bass landed by the Bailiwick fleet in 2004. The number of vessels that contributed to bass landings using all methods is also shown, peaking at 56 vessels in August or 46% of the licensed fleet active in that month, highlighting the importance of bass to a large proportion of the fleet.

Boue Blondel, a submerged rock pinnacle 3 miles west of Lihou Island attracted a large amount of publicity which has continued in 2005. The rod and line (and hand line) only fishery at Boue Blondel was discovered in mid February and effort steadily increased with 6 licensed vessels active in February, 14 in March and 30 in April, the fish having moved on by May. Of course many recreational vessels retained fish from Boue Blondel but it is unlikely that recreational vessels retained more than 5 tonnes of Bass in total. Thus a total of 55 tonnes of bass was likely to have been removed from the Boue Blondel rod and line fishery in 2004. Assuming a 2.5kg average this would equate to 22000 Bass.

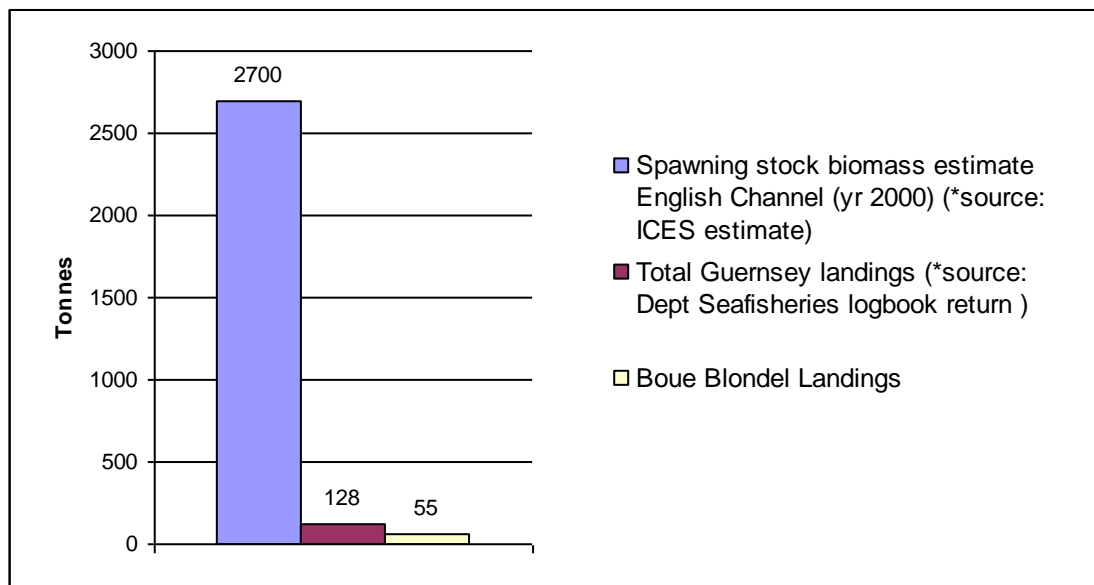


Chart 6: Boue Blondel landings (2004) in relation to spawning stock biomass estimate for the English Channel.

Chart 6 compares the Boue Blondel landings with the ICES estimate of spawning stock for the year 2000 (the latest assessment available). Landings were in the order of 0.2% of this latest population census for adult bass in the English Channel. Thus a closure of the Boue Blondel on its own would unlikely have had a major influence on the sustainability of the bass population. As such the Department had no scientific basis on which to close the fishery, particularly when French trawlers were and still are able to fish the Channel stock unrestricted, taking a much higher overall landing.

*On the 13th January 2005 the Department introduced a netting ban by licence condition extending 0.5 nautical miles around Boue Blondel.

5. The Fleet

Table 3 shows the composition of the Guernsey licenced fleet as at 31st December 2004. Although 84 Guernsey licences were issued to UK registered vessels as part of our reciprocal licensing arrangement with the UK, only a small number of these vessels actually fished in Bailiwick waters in 2004.

Table 3: Structure of the Guernsey licenced fleet.

Vessel Category	Number of vessels
GU registered <10m (32'9")	158
GU registered >10m	16
Jersey registered >10m	9
Jersey Registered <10m	1
UK registered (all vessels)	84
Total	268

Chart 7 shows the development of the GU registered licensed fleet. It can be seen that there was an increase in licensed vessels during the year from 153 in January 2004 to 175 by year end. A clear seasonal trend can be seen in the number of vessels active from a low in January of 57 (37% of the licensed fleet) to a high in August of 123 vessels (72% of the licensed fleet) with more boats being launched and in use over the summer months by part time operators. The 57 vessels active in January is probably a close reflection of the number of full time fishing vessels in the Bailiwick licenced fleet. There were 14 active vessels over ten metres (> 32'9") during 2004, 7 trawlers, 5 crabbers, and 2 multipurpose vessels, the stern trawler Amy Blue (GU116) and potter Nemo (GU99) joining the fleet register during 2004.

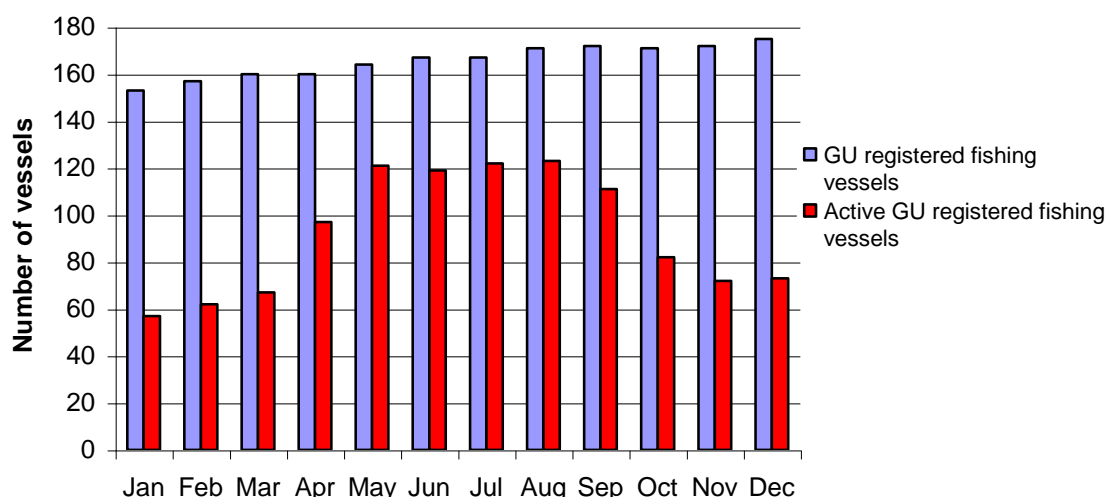


Chart 7. Development of the GU registered and licensed fleet in 2004 and proportion actively fishing. Number of vessels as at month end.

*Vessel recorded as active if logsheet submission showed landings in a particular month.

5.1 The Alderney Fleet

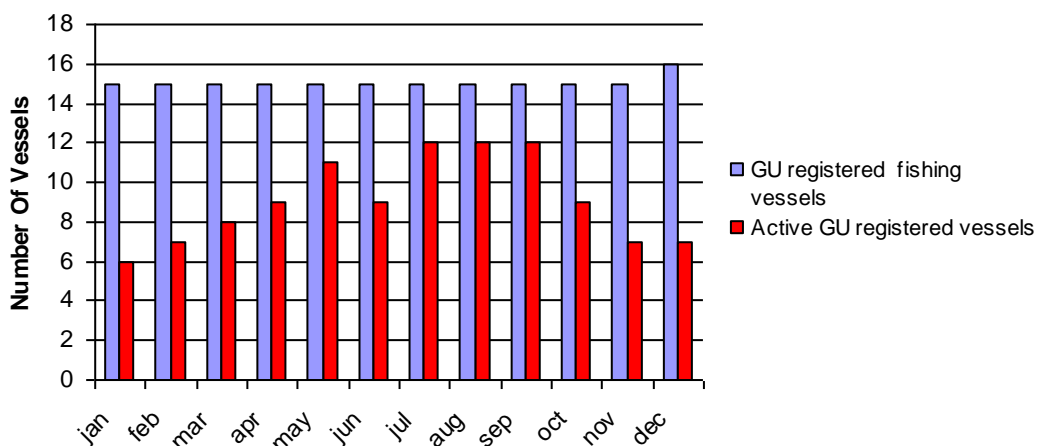


Chart 8. Development of the GU registered fleet based in Alderney in 2004 and proportion actively fishing. Number of vessels as at month end.

Chart 8 shows the development of the licensed fleet based in Alderney. The fleet remained relatively stable at 15 vessels with one addition in December of 2004. A similar seasonal pattern in activity is evident with 6 vessels active in January (40% of the licensed fleet) to 12 active during the summer months (80% of the licensed fleet). Only two over ten metre (> 32'9") GU registered vessels are based in Alderney, the potter Paulanda (GU9) and the charter vessel Alderney Felix (GU77)

5.2 The Sark Fleet

Chart 9 shows the development of the licensed fleet based in Sark. There were 13 licensed vessels at year end, two having been added in August 2004. The Sark winter closed season on potting is clearly evident, only one Sark potter operating outside Sark waters in the winter.

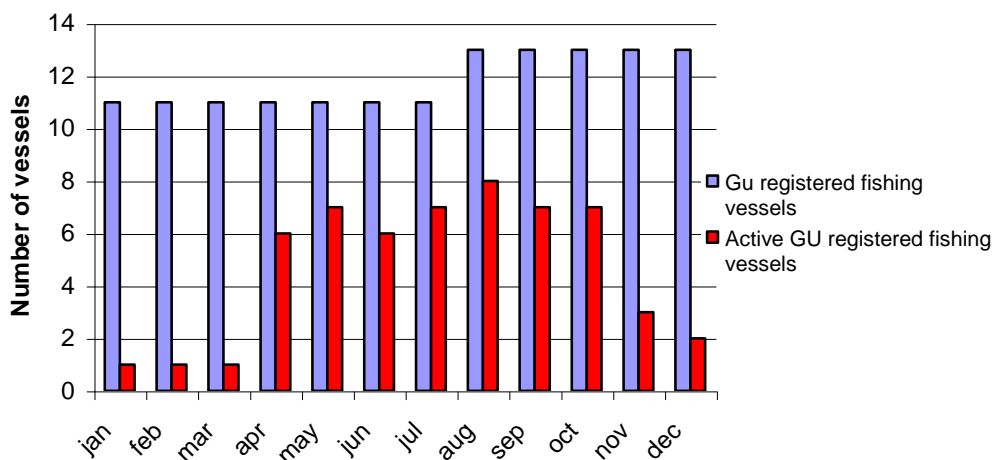


Chart 9. Development of the GU registered licensed fleet based in Sark in 2004 and proportion actively fishing. Number of vessels as at month end.

6. Fishing Effort

Chart 10 shows the combined number of days at sea exerted by the GU registered licensed fleet in 2004. The influence of better summer weather allowing more vessels and more days at sea can be clearly seen by the sharp increase in activity, peaking last year at just over 1300 fleet days at sea in June. October 2004 had a high average wind speed (2004 met office annual report) which contributed to the low number of days at sea recorded for that month.

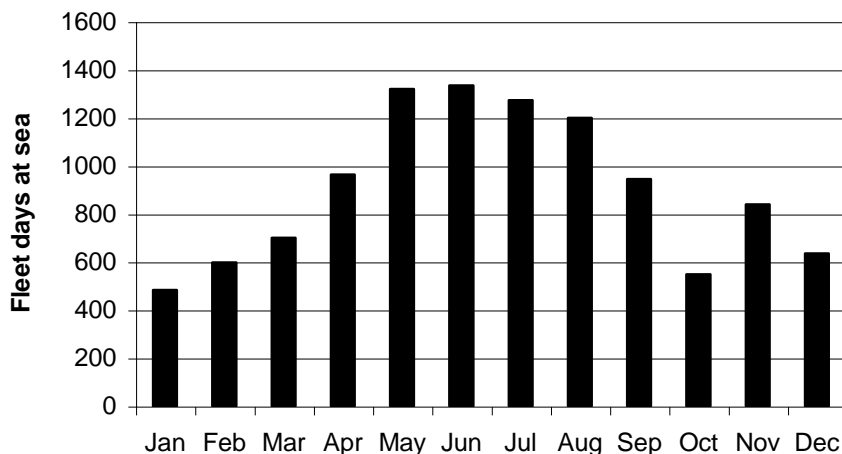


Chart 10. Combined fleet days at sea 2004 (All GU reg vessels).

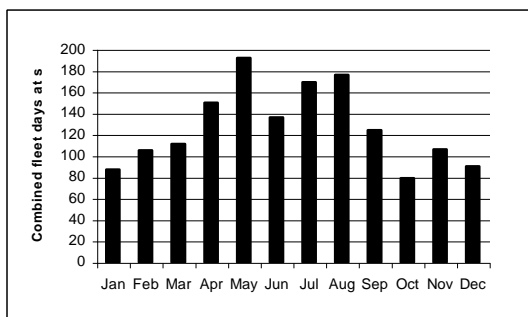


Chart 11: Combined fleet days at sea 2004. (Alderney based vessels).

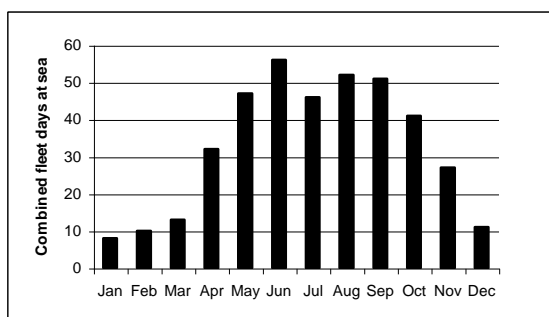


Chart 12: Combined fleet days at sea 2004 (Sark based vessels).

6.1 Pots In Use

Chart 13 shows the total number of pots in use by GU registered vessels during 2004. June was the peak month with 17853 pots in use. The monthly variation is due to the increase in under ten metre vessel activity following the traditional winter lay up period and the seasonal spider fishery from April to July. The deployment of spider gear is evident in Chart 14 which shows the relative proportions of inkwells and parlours deployed by the under ten metre fleet, reaching a peak of 5133 inkwells in use by June 2004.

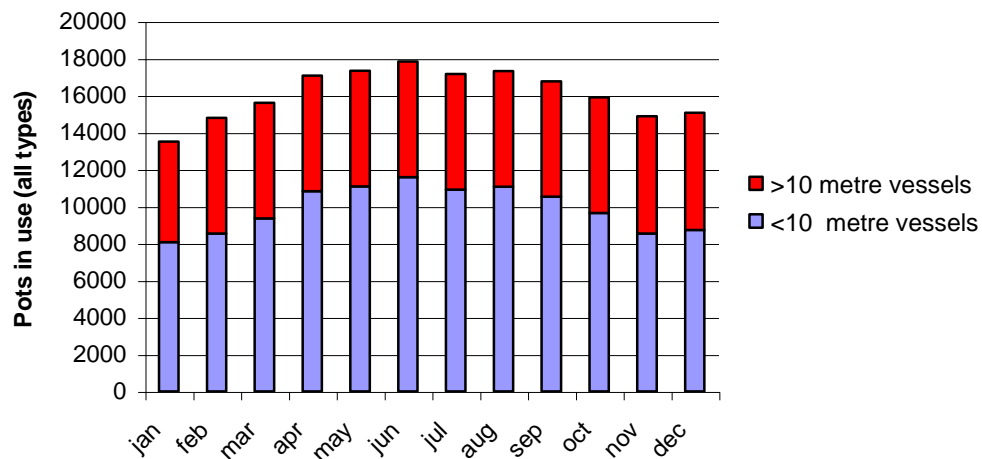


Chart 13: Pots in Use by month 2004

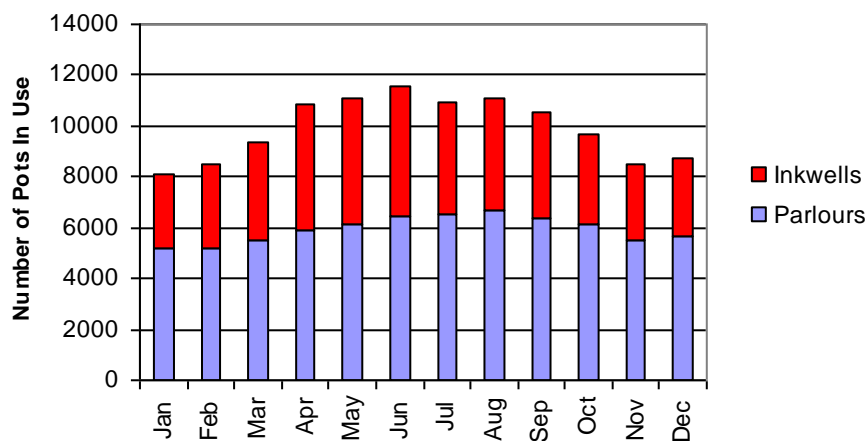


Chart 14: Pots in use by month (2004) <10m vessels

Chart 15 (overleaf) shows the pots in use by the 5 over ten metre (>32,9”) crabbers during 2004. usage was stable over the year as is to be expected for these larger full time boats with 6350 predominately inkwell pots in use by year-end.

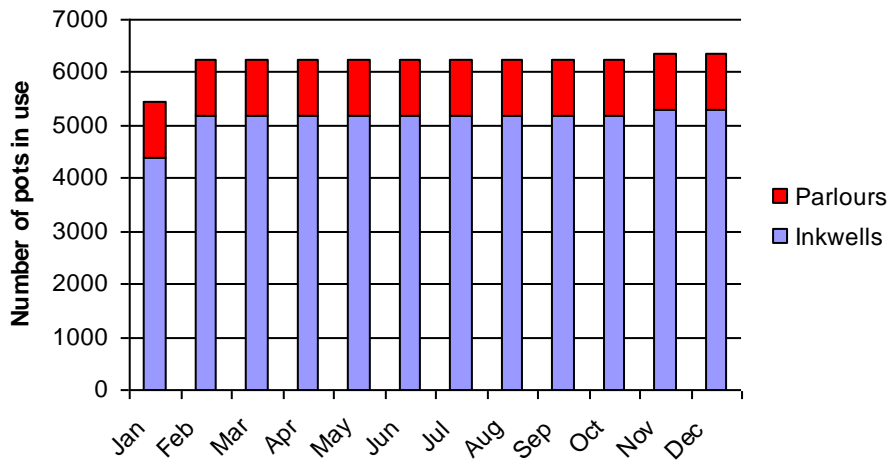


Chart 15: Pots in use by month (2004) >10m vessels.

6.2 Investment In Pots.

Assuming an average cost per pot (rigged in the water) of £50 , the replacement value of pots operated by the GU registered fleet, based on the June 2004 peak month of 17853 pots is £893,000.

6.3 Pot lifts

Chart 16 shows the total number of pots lifted by month for 2004. The variation in pot lifts during the year was largely due to the influence of the under ten metre fleet as better weather and catch rates during the summer allows more access to the gear for the smaller vessels.

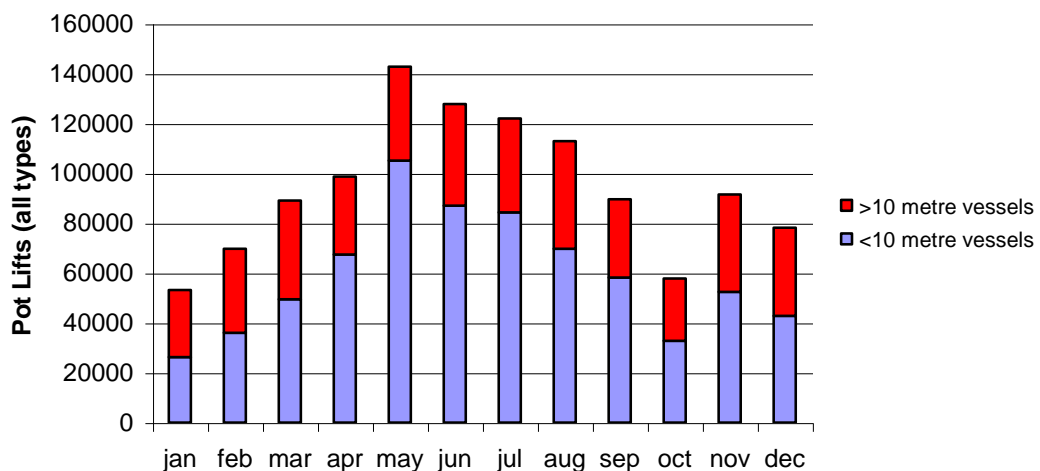


Chart 16: Monthly Pot lifts all vessels

Chart 17 depicts the increase in inkwell lifts in May and the overall increase in potting activity by the under ten metre fleet during the summer months. The annual total potlifts for 2004 was 1.13 million. The notable October lack of activity was due in part to the bad weather that prevailed that month (as mentioned earlier in this report), as well as October being a traditionally slower month for potters with lower catch rates on some grounds coupled with lower prices prior to the Christmas period. Although not evident from the chart the bass fishery at Boue Blondel from mid February to early May 2004 diverted effort resulting in a lower turnover of gear by the many smaller potters that participated in the fishery.

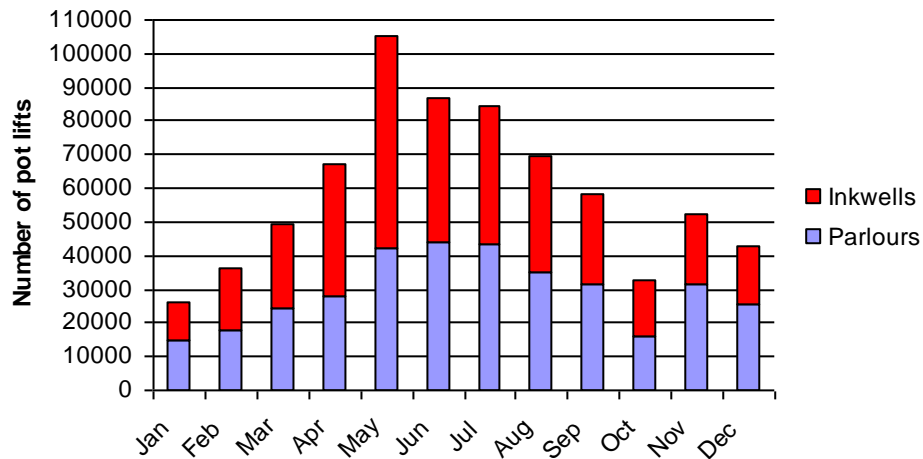


Chart 17: Monthly pot lifts by pot type (<10 metre vessels)

Monthly pot lifts for the 5 over ten metre potters is shown in Chart 18. It was not possible to split the parlour /inkwell lifts although a high proportion were inkwell lifts. Effort peaked in August 2004 with 43270 lifts.

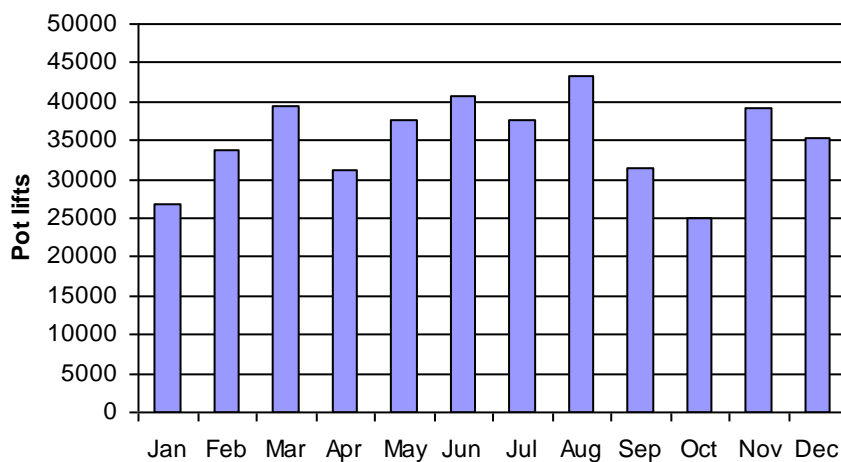


Chart 18: Monthly pot lifts (>10 metre vessels)

6.4 Effort On Finfish and Molluscs

Table 4: Monthly Effort on finfish and scallops by Method 2004.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Nets Set (000's m)	162.7	114	46.6	45.9	42	28.5	47	38.9	35.4	52.9	156.5	101	871.5
Angling (hours)	138	418	1070	1740	1317	1482	1446	1184	820	270	223	173	10281
Longlining (000,s hooks)	0.7	10.3	7.4	18.9	36.8	28.3	22.2	25.4	22.2	13.3	19.6	23.1	228.2
Diving (days) ⁽¹⁾	58	51	49	54	65	71	104	115	75	49	74	45	810
Otter trawl (days) ⁽²⁾	29	19	13	1	14	20	31	41	37	37	45	31	318
Pair trawl (days)		7	7	5	2	6						1	28
Beam trawl (days)	3	2					7	8	6				26
Scallop dredge (days) ⁽³⁾	22	21	29	30	27	35	34	31	22	20	31	31	333

(1) Most diving days relate to scallop fishery where a typical day would average 2 hours bottom time per man. Other dive effort where flatfish were the target species.

(2) Seven >10m and 4 <10m trawlers active during 2004. Tow time varied

(3) Scallop dredge effort from three <10m vessels towing a maximum of 6 dredges each generally fishing daylight hours.