



Addendum to Implications of Brexit for Fishing Opportunities in Wales

April 2018

This paper is an addendum to the report 'Implications of Brexit for Fishing Opportunities in Wales'. Since its publication in February 2018, the authors have made further calculations to illustrate where Welsh quota species are caught and landed. Regarding what a fair share of fishing opportunities might look like for Wales alone, Table XC shows figures for Wales, replacing Table G in Appendix A of the main report, which showed figures for Welsh and English gains together.

Where Welsh quota is currently caught and landed

Table XA illustrates that the vast majority of quota fished by Welsh vessels is caught outside Welsh waters, mostly in Irish waters. Table XB shows that these quota species are then landed predominantly in EU ports outside the UK, in Ireland and Spain.

Table XA: Where Welsh quota species are caught, by EEZ

Exclusive economic zone (EEZ)	Tonnes	Landed weight of quota by EEZ	Value (£)	Landed value of quota by EEZ
France	0.72	0%	2,700	0%
Ireland	481.86	70%	1,594,547	74%
Total EU	482.58	71%	1,597,247	75%
England	111.15	16%	347,635	16%
Guernsey	3.33	0%	12,849	1%
Isle of Man	0.06	0%	448	0%
Northern Ireland	0.02	0%	59	0%
Scotland	3.00	0%	25,885	1%
Wales	66.75	10%	137,569	6%
Total UK	184.31	27%	524,444	24%
International waters	16.69	2%	19,168	1%
Total all areas	683.59	100%	2,140,859	100%

Source: Authors' calculations based on MMO 2016 (2017). Tonnage measured in live weight.

Table XB: Where Welsh quota species are landed, by port nationality

Port Nationality	Tonnes	Landed weight of quota by port nationality	Value (£)	Landed value of quota by port nationality
England	46.89	7%	198,686	9%
Scotland	2.99	0%	25,847	1%
Wales	133.82	20%	298,221	14%
Total UK	183.70	27%	522,754	24%
Ireland	420.60	62%	1,395,172	65%
Spain	79.28	12%	222,934	10%
Total EU	499.89	73%	1,618,106	76%
Total all locations	683.59	100%	2,140,859	100%

Source: Authors' calculations based on MMO 2016 (2017). Tonnage measured in live weight.



This pattern of activity suggests that restrictions on access to waters would significantly disrupt current fishing practices, with only 10 per cent of Welsh quota currently caught in Welsh waters and 27 per cent in UK waters. Continued access for Welsh vessels to EU waters may therefore continue to be important.

What might a fair share of fishing opportunities look like for Wales?

Currently both the EU-UK and UK-Wales division of quota are determined through fixed shares, largely based on historical landings. The implication of this system is that any increase in post-Brexit fishing opportunities would accrue to existing UK quota holders, of which there are very few in the Welsh fleet. It has recently been reported that 88 per cent of quota fished by Welsh vessels is in fact owned by Spanish firms, partly explaining the landings of Welsh quota to Spanish and Irish ports.¹

An alternative system of quota division between countries, zonal attachment, would divide quota based on the share of stocks within each country's waters, estimated by landings by exclusive economic zone (EEZ).

As explained in section 3 (p.31-32) of the report, it is estimated that a change in EU-UK quota sharing based on zonal attachment could increase Welsh quota holdings by 170%.

Extending the principle of zonal attachment to the division of UK-Wales quota would further significantly increase fishing opportunities for Wales. Based on the location of landings, using Welsh waters instead of quota holdings to divide EU-UK quota would increase Welsh quota by 1880% (12,848 tonnes).

Table XC: UK and EU quota landings by Welsh EEZ

Rectangle	UK EEZ	EU EEZ	UK Landings	EU Landings	Net difference	EU landings in Welsh EEZ
36E6	99%	0%	37%	63%	91	17
36E5	100%	0%	83%	17%	52	26
36E4	52%	47%	47%	53%	296	58
35E6	100%	0%	98%	2%	0	0
35E5	100%	0%	47%	53%	5	5
35E4	32%	67%	17%	83%	65	65
34E5	100%	0%	7%	93%	10	10
34E4	42%	58%	8%	92%	41	41
33E5	100%	0%	19%	81%	26	26
33E4	62%	37%	4%	96%	135	135
32E6	100%	0%	80%	20%	0	0
32E5	100%	0%	45%	55%	21	21
32E4	98%	1%	15%	85%	671	671
32E3	13%	86%	5%	95%	247	247
31E6	100%	0%	91%	9%	5	2
31E5	100%	0%	84%	16%	66	15
31E4	100%	0%	7%	93%	1,387	902
31E3	68%	32%	1%	99%	10,967	10,967
30E3	100%	0%	15%	85%	1,405	119
30E2	28%	71%	8%	92%	803	3

¹ Leake, J. (2018). Foreigners to net UK fish after Brexit: Overseas firms have already bought much of Britain's quota and will keep it after we quit the EU. The Times, 23 March.



EU quota landings in Welsh EEZ	13,331
Welsh quota landings in EU EEZ	483
Net difference	12,848
Welsh quota landings	684
Percentage change	1880%

Source: Authors' calculations based on STECF 2012-2015 (2017); Marineregions.org (2017).

As noted in section 3 (p.35-37) of the report, using Welsh waters for the division of UK quota to the devolved administrations would increase Welsh quota by a further 257% (1,758 tonnes). These potential gains are significant, and while the percentage changes stand out as large, this is because of the relatively small size of Welsh quota landings at present.

These potential fishing opportunities (based on current UK fishing activity) are separate to the fishing opportunities resulting from the UK receiving quota based on zonal attachment in EU negotiations (based on current EU fishing activity). This means that should these specific conditions occur, 14,606 tonnes of additional quota could be allocated to Welsh vessels (2135% increase).