



# VALUE OF SEAFOOD TO CORNWALL & THE ISLES OF SCILLY

Report Prepared For  
Cornish Fish  
Producers Organisation

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# 1.0 EXECUTIVE SUMMARY

## - KEY FINDINGS ON VALUE OF SEAFOOD

The Cornwall and Isles of Scilly (CloS) seafood industry is comprehensive, covering all stages of the supply chain, including businesses supplying and involved in primary production, via fishing and aquaculture, processing, wholesale and distribution, retail, and foodservice via restaurants, cafés and other outlets.

Across the entire local seafood sector and upstream supply chain, there were around 7,800 jobs in 2021.

The seafood sector is around four times more important to CloS, than seafood is to the UK as a whole. This is true for most key economic indicators, including jobs. 2.9% of jobs in CloS depend on seafood, compared to around 0.7% of UK jobs.

The key driver behind this significant over-representation in seafood locally is the presence of the marine fishing sector, which in turn relies on sustainably-managed fish and shellfish stocks. For every job in the CloS catching sector, there are 15 more jobs across Cornwall and Isles of Scilly in other seafood sub-sectors. Fishing contributes relatively higher added value per worker than other sub-sectors within the overall CloS seafood industry.

There is a mutually beneficial relationship between tourism and seafood in CloS. Five of the additional 15 jobs located across CloS in other seafood sub-sectors rely on tourism as well as on seafood.

**“If you don’t have fishing,  
you don’t have communities”**

The seafood sector in Cornwall also contributes substantially to the overall wellbeing and sense of identity of people involved in and related to the seafood sector.

Processors, wholesalers, retail and foodservice outlets handle local seafood and also import prepared seafood from the rest of the UK and from overseas, especially of species not produced or not available in quantity in CloS. Catchers, wholesalers and processors export Cornish seafood to the rest of the UK and overseas.

The catching sector in CloS is the mainstay of the industry overall, providing raw material that creates opportunities to add value in CloS and beyond, and continuing a centuries-old tradition that is part of the identity of CloS. Fishing businesses range in size from single, small vessels to multiple, larger vessels. In 2021, the value of landings into CloS, by all vessels, was £44.1 million.

The processing and wholesale sector CloS consists of around 60 businesses, mostly small to medium sized, and supplies businesses throughout CloS, UK and overseas. CloS processing contributed 22% of CloS GVA from only 10% of workforce jobs and 4% of businesses in the CloS seafood sector.

Restaurants, cafés and other foodservice outlets in CloS rely on local seafood and seafood in general to a much larger degree than restaurants in the UK as a whole, reflecting the presence and proximity of the CloS catching sector and the prominence in Cornish culture of the fishing industry. There are an estimated 2,500 foodservice outlets in CloS, of which 820 specialise in or feature seafood. Seafood specialist restaurants, featuring local seafood, are much more prevalent in CloS than elsewhere in UK and benefit from the presence and visibility of a thriving catching sector as well as on tourism and visitors.

Crew members on larger vessels are increasingly from overseas, while smaller boats are still mostly operated by local crew. In processing, there are fewer workers from Eastern European countries than before the EU Exit referendum, and most employees are British.

The foodservice sector dominates seafood-dependent employment in CloS, with an estimated 5,850 jobs (in 2023) in foodservice outlets featuring or specialising in seafood and in the wider economy dependent on foodservice sector wages.

Table 01 shows the values of the economic indicators for the whole seafood sector and shows separately the direct impact for each measure and the upstream and induced impact for each measure. The CloS seafood sector is regionally important, with around a quarter of the South West England seafood sector.

**“Fishing is 100% intertwined with  
the rest of the economy here”**



**Table 01 — Sum of economic indicators for the whole seafood sector in CloS in 2021**

Metric Category	Description	Value	% Of CloS All Industry	Reference Area Whole Seafood Sector Contribution
Gross Value Added	Direct Impact (100% In CloS)	£130m	1.1%	24% of SW 3% of England 2% of GB
	Total Impact Including Direct, Supply Chain And Induced Impacts (Over 90% In CloS)	£174m	1.5%	24% Of SW 3% of England 2% Of GB
Workforce Jobs	Direct Impact (100% In CloS)	6,610	2.5%	27% Of SW 5% of England 4% Of GB
	Total Impact Including Direct, Supply Chain And Induced Impacts (Over 90% In CloS)	7,780	2.9%	27% Of SW 4% of England 3% Of GB
Workforce Job Ftes	Direct Impact (100% In CloS)	4,860	2.3%	27% Of SW 5% of England 4% Of GB
	Total Impact Including Direct, Supply Chain And Induced Impacts (Over 90% In CloS)	N/A	N/A	N/A
Wages	Direct Impact (100% In CloS)	£92m	1.4%	23% Of SW 3% of England 2% Of GB
	Total Impact Including Direct, Supply Chain And Induced Impacts (Over 90% In CloS)	£115m	1.8%	23% Of SW 3% of England 2% Of GB
Businesses	CloS-Based Businesses Involved In The Production Of Seafood For Final Consumption Within Or Outside Of Cornwall	1,630	5.6%	18% Of SW 2% of England 2% Of GB

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# 2.0 INTRODUCTION & BACKGROUND

## 2.1 Project Origin & Purpose

Cornish Fish Producers' Organisation (CFPO) released a new fishing and seafood strategy for Cornwall in 2021, supported by the Cornwall and Isles of Scilly Local Enterprise Partnership. The seafood strategy aims for a sustainable, thriving seafood sector contributing to society and the economy in Cornwall and beyond. The plan includes several strategic actions and projects, including a need to estimate and understand the full value of Cornish seafood, beyond first sale value. The most recent relevant report on the local seafood industry that CFPO and others had to rely on was published in 2003.

## 2.2 Project sponsorship & research

The research project was led by CFPO, with expert input from an Advisory Group with members from Cornwall Council, Seafish and Defra. The work was conducted by consultants Hazel Curtis, seafood industry consultant and former chief economist at Seafish, and Jim Plunkett-Cole, economist.

The research was to generate a report containing an assessment of value, but specifically, no recommendations or further interpretation of how the findings could be applied to decision making. This was because there are multiple audiences, decision-makers and potential investors among those who would be interested and recommending actions is a separate task to collecting and analysing data.

Data were contributed by businesses of all types with connection to seafood in CloS.

## 2.3 Audiences and uses of this report

This up-to-date knowledge of the full value and local importance of Cornish seafood will help CFPO and others to prioritise a series of actions and projects over the next decade.

The values estimated will form a baseline against which to assess the effect of implementing CFPO strategic plans, and will inform public and private investment decisions, relating to infrastructure and business investment.

CFPO board members will use findings from this study to inform their consideration of priorities for specific actions to deliver progress under their strategic pillars for sector development:

**Sustainability:** ensure fish stocks

**Access to the resource:** physical and fishing rights

**Marketing:** maximise value of seafood caught and landed

**People:** ensure attractive jobs to recruit and retain workers across the supply chain

## 2.4 Value & Drivers of Value – Interpreting These Figures

Standard approaches used to describe or estimate the value of industry sectors include direct, indirect and induced effects, and in this report, we consider the fishing sector as the primary industry sector. Supply chain or upstream businesses are those that supply goods and services to the catching sector and downstream businesses and activities are those that rely on the seafood brought into the economy by the catching sector.

In this report, value is described by contribution to gross value added, employment, wages and number of businesses. Overall welfare, well-being and non-monetisable benefits are also considered.

Drivers of value are described as the factors influencing the value created and what types of businesses or activities are key to the value generated.

In this report, we estimate economic indicators for businesses that relied wholly or partly on seafood in 2021, the most recent year for which data are available.

All assumptions used in calculating the estimates included in this report fall on the side of modest rather than optimistic. These figures could not reasonably be described as over-estimates.

## 2.5 Other Outputs from this Study

In addition to this report and presentations of findings given in Cornwall and remotely, this study has produced and supplied to CFPO an economic model which can be updated with new data in future years. This means that the value delivered from this research includes the ability to show a time series of data in coming years at less expense than would be incurred by starting from scratch every time. The model comes with instructions on how to update with new annual data.

## 2.6 Structure of this Report

This report is organised to give an overview of the entire value of the entire seafood sector in CloS, followed by chapters for each sector of the seafood industry. Each sector chapter is organised in the same order with an overview table presenting GVA, employment, wages and number of businesses. Value generated by upstream activities is also presented.

As the origin sector, characteristics and performance of the CloS marine fishing sector is covered in more depth in an additional chapter, Chapter 10.

Fishing dependency is considered separately, followed by a short indication of views from research interviews on the value of seafood to CloS.

Toward the end of the report are sections on methods, further tables of relevant data, further output tables, and references.





# 3.0 TOTAL VALUE OF SEAFOOD TO CORNWALL & ISLES OF SCILLY

## 3.1 The Cornwall & Isles of Scilly seafood sector overall

For this report the CloS seafood sector is defined as comprising all economic activity involved in the production of seafood for final consumption within or outside of Cornwall and Isles of Scilly. There are six main seafood sector sub-components in the downstream seafood sector supply chain:

1. Marine fishing
2. Marine aquaculture
3. Seafood processing
4. Seafood wholesale
5. Seafood retail
6. Seafood foodservice

**Table 3.1** shows the value of the Cornwall & Isles of Scilly seafood sector in summary. It does this through estimates of the key value metrics of:

- Gross Value Added Output (GVA)
- Employment or Workforce Jobs (Jobs and Full-Time Equivalents – FTEs)
- Wages
- Businesses

All indicators in the table include imports of seafood into Cornwall & Isles of Scilly as well as seafood landed, processed and/or sold or served in CloS.

Each indicator, with the exception of number of businesses, represents the sum total of the three main elements of economic impact:

### The 'Direct Impact'

The on-site workplace impact (including sea-based activity) taking place within each seafood sector sub-component in CloS.

### The 'Indirect Impact'

Also referred to as the upwards supply chain impact. This impact relates to activity derived from the purchase of 'non-fish' goods and services by each sub-component. Fish have been excluded from the upwards supply chain for each sub-component in order to avoid double-counting. Estimates have been made for the percentage of supply chain purchases from CloS-based businesses and the percentage for businesses outside of CloS.

### The 'Induced Impact'

The impact that occurs from all direct and indirect-related workers spending their wages on final goods and services. Again, estimates have been made for the percentage of induced activity taking place in CloS (i.e., from CloS-based businesses) and the percentage for businesses outside of CloS.

## 6.2 Overview of individual value indicators

The sums of the economic indicators for each sector of the seafood industry in CloS are presented in **table 3.1** opposite.

### 3.3 GVA

One of the key measures of 'value' of an industry is "Gross Value Added Output", most commonly known as GVA.

GVA represents the additional value added by the businesses in a particular industry in the production of a good, or provision of a service. At its simplest, and at the aggregate industry level, GVA is approximated by sales or turnover of the industry less the cost of sales of that industry (excluding salaries / wages). Alternatively, it can be thought of as profit plus cost of wages. For the most part, the cost of sales of a particular industry is the value of supplier goods and services purchased by that industry in the production process (or in the delivery of its services).

Analysis undertaken for this report suggests that in 2021, the Cornwall and Isles of Scilly seafood sector had direct GVA of approximately £130 million and total GVA, when supply chain and induced effects are considered, of around £174 million. These represented 1.1% and 1.5% of the overall CloS GVA of £11.6 billion.

In terms of the CloS seafood industry GVA contribution to the GVA of the regional and national seafood industries, estimates suggest that the CloS industry represented:

- Around one quarter (24%) of the South West's seafood industry
- 3% of England's seafood industry
- 2% of Great Britain's seafood industry

### 3.4 Employment

In 2021 the CloS seafood industry was responsible for around 6,600 direct CloS workforce jobs (4,900 FTEs) and 7,800 total CloS workforce jobs when supply chain and induced impacts are included. CloS seafood direct jobs accounted for 2.5% of total CloS jobs, and total seafood jobs including supply chain and induced jobs accounted for 2.9% of all CloS jobs.

The CloS seafood industry represented around 27% of South West regional employment in seafood and around 3% to 4% of national seafood industry employment in 2021.

### 3.5 Wages

The CloS seafood sector had direct wages of approximately £92 million and total wages of around £115 million when supply chain and induced effects are included, in 2021. These represented 1.4% and 1.8% of the overall CloS wages of £6.5 billion.

The CloS seafood industry represented around 23% of South West regional seafood wages and around 2% to 3% of the England or GB national seafood industry total wages bill in 2021.



**Table 3.1** The Value Of The Cornwall & Isles Of Scilly Seafood Sector In Summary

Metric Category	Description	Value	% Of CloS All Industry	Reference Area Whole Seafood Sector Contribution
Gross Value Added	Direct Impact (100% In CloS)	£130m	1.1%	24% of SW 3% of England 2% of GB
	Total Impact Including Direct, Supply Chain And Induced Impacts (Over 90% In CloS)	£174m	1.5%	24% of SW 3% of England 2% of GB
Workforce Jobs	Direct Impact (100% In CloS)	6,610	2.5%	27% of SW 5% of England 4% of GB
	Total Impact Including Direct, Supply Chain And Induced Impacts (Over 90% In CloS)	7,780	2.9%	27% of SW 4% of England 3% of GB
Workforce Job Ftes	Direct Impact (100% In CloS)	4,860	2.3%	27% of SW 5% of England 4% of GB
	Total Impact Including Direct, Supply Chain And Induced Impacts (Over 90% In CloS)	N/A	N/A	N/A
Wages	Direct Impact (100% In CloS)	£92m	1.4%	23% of SW 3% of England 2% of GB
	Total Impact Including Direct, Supply Chain And Induced Impacts (Over 90% In CloS)	£115m	1.8%	23% of SW 3% of England 2% of GB
Businesses	CloS-Based Businesses Involved In Seafood Production For Final Consumption Anywhere	1,630	5.6%	18% of SW 2% of England 2% of GB

Source: Economic modelling undertaken by Smart Growth Analytics for this project, based on data from ONS (BRES, UK Business Count, Annual Business Inquiry, Regional GVA, Workforce Jobs), Seafish (estimated contribution of seafood to UK retail), TripAdvisor foodservice data.

3.6 Number of businesses

The CloS seafood industry had approximately 1,600 businesses involved in it directly in 2021, equivalent to around 5.6% of all CloS businesses.

The main reason why CloS seafood industry businesses are a much higher proportion of total CloS businesses, than the equivalent indicators for GVA, jobs and wages, is that there are many businesses in retail and foodservice which are involved, at least in part, in the CloS seafood industry.

The CloS seafood industry represented around 18% of South West regional seafood businesses and around 2% of national seafood industry businesses in 2021.

3.7 Regional and national comparisons

Perhaps the best approach to understand the relative importance of the seafood industry in CloS to the seafood industry across the rest of the UK is through comparisons of the relative structural contribution of the industry across the various key seafood industry reference areas we are interested in:

- Great Britain / UK
- England
- South West
- Cornwall
- Isles of Scilly
- Cornwall and Isles of Scilly (CloS)
- Plymouth
- Cornwall and Isles of Scilly and Plymouth (CloS + Plymouth)

Table 3.2 (opposite) shows two indicators which illustrate the value of the seafood industry in CloS compared to reference areas. The first part of the table shows, for each key economic indicator, the seafood industry value for each area as a percentage of all industry in that area.

The second part of the table shows the various “location quotients” (LQs) for each indicator in each area, when benchmarked against the respective Great Britain representation for the seafood industry. An LQ of 1 means that an area has the same representation as Great Britain as a whole. An LQ of 2 means an area has exactly twice the Great Britain representation and an LQ of 0.5 means an area has just one half (50%) of the national representation for that indicator.

3.8 Analysis of geographical context

Our findings suggest that, in general terms at least, the CloS seafood industry is around four times more important to the CloS economy than seafood is to the regional and national economies:

- The CloS seafood sector contributes almost 4 times higher proportion of GVA to the CloS economy than the seafood industry contributes to national (GB) GVA.
- The CloS seafood sector contributes more than 4 times higher proportion of jobs to the CloS economy than the seafood industry contributes to national (GB) jobs.
- The CloS seafood sector contributes exactly 4 times higher proportion of wages to the CloS economy than the seafood industry contributes to national (GB) wages.
- The CloS seafood sector contributes almost 2 times higher proportion of direct businesses to the CloS economy than the seafood industry contributes to national (GB) businesses.

3.9 Explaining why seafood is more important to CloS

There are two key related and mutually supportive factors which drive the higher relative contribution of the seafood sector to CloS: the presence of the CloS marine fishing sector, and Cornwall’s status as one of the UK’s top destinations for tourism (both domestic tourism and international tourism).

Whilst these two driving factors may seem obvious, slightly less obvious is that, without its tourism industry, a much higher proportion of the seafood landed locally would instead be exported outside of Cornwall and processed, sold, and consumed across the rest of the UK and abroad.

The importance of this is especially relevant in the food service sector. Without Cornwall’s very significant over-representation in restaurants, cafés, pubs and seafood takeaways which support and depend on Cornwall’s tourism industry, a much higher proportion of fish landed in CloS would be exported for consumption outside of CloS. This is important because, as we show later in this report, Cornwall’s higher proportion of value from seafood relative to the UK as a whole, depends on the contribution of seafood to the CloS food service sector.

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Table 3.2 The value of the seafood industry in Cornwall and Isles of Scilly and key reference areas

Area	Seafood sector as % of All Industry Within Area				Location Quotient (Area Vs. GB)			
	Total GVA	Workforce Jobs	Total Wages	Direct Businesses	Total GVA	Workforce Jobs	Total Wages	Direct Businesses
Great Britain	0.4%	0.7%	0.4%	3.0%	1	1	1	1
England	0.3%	0.6%	0.3%	2.8%	0.8	0.9	0.8	1
South West	0.5%	1.0%	0.6%	3.3%	1.3	1.5	1.3	1.1
Cornwall	1.5%	2.8%	1.8%	5.5%	3.9	4.3	4	1.9
Isles of Scilly	5.1%	12.0%	6.8%	19.6%	13.4	18.2	15.3	6.6
CloS	1.5%	2.9%	1.8%	5.6%	3.9	4.4	4	1.9
Plymouth	0.8%	1.2%	0.9%	2.0%	2	1.9	1.9	0.7
CloS+Plymouth	1.2%	2.3%	1.5%	4.9%	3.3	3.6	3.3	1.6

Source: Economic modelling undertaken by Smart Growth Analytics for this project, based on data from ONS (BRES, UK Business Count, Annual Business Inquiry, Regional GVA, Workforce Jobs), Seafish (estimated contribution of seafood to UK retail), TripAdvisor foodservice data







# 3.10 SEAFOOD SECTOR RELIANCE ON MARINE FISHING SECTOR & TOURISM

We estimated how much of Cornwall's higher proportion of value from its seafood industry is a direct result of the presence of its marine fishing sector by using Cornwall's seafood industry employment. In 2021, CloS had a total of 269,000 workforce jobs. **Tables 3.1 and 3.3** show that 7,780 of these (3.5% of total workforce jobs) are part of the CloS seafood industry. If CloS had 0.8% of its total workforce jobs in the seafood industry, as found nationally, then CloS would have just 1,800 jobs in its seafood sector, a difference of some 6,000 jobs.

We then consider Cornwall's over-representation in food service as a result of its tourism sector, which means that we would expect CloS to have much higher representation in all foodservice, including seafood foodservice. We do this by looking at CloS over-representation in tourism.

Data from the ONS Business Register & Employment Survey (BRES) shows that CloS has around twice as high a proportion of jobs in tourism as GB on average. Because the CloS number of seafood jobs would be 1,800 if it had the same proportion as GB, this double proportion for CloS suggests that, more or less, there are an absolute maximum of 1,800 more jobs in seafood in CloS directly as a result of its tourism industry. These 1,800 jobs are then deducted from the 6,000 jobs in the CloS seafood industry that are additional compared to national rates, and therefore we estimate that CloS has an additional 4,200 jobs in its overall seafood industry directly as a result of its marine fishing industry.

CloS has around 380 workforce jobs employed directly in the marine fishing industry. If we divide 4,200 by 380 we get a 'multiplier' of around 11. This means that, for every job in its catching sector, CloS has another 10 jobs in other seafood industry sub-sectors directly as a result of the presence of its catching sector (excluding the impact of additional tourism). When Cornwall's additional tourism impact is considered (i.e. we divide 6,000 by 380) then this multiplier approaches 16 (i.e., 15 more jobs in CloS for every job in its marine fishing industry, including the influence of tourism in CloS).

This analysis also suggests that CloS has around 5 more jobs in seafood (for every marine fishing job) directly as a result of its tourism industry. In other words, around two thirds of the CloS seafood industry value is a direct result of the presence of its marine fishing sector and one third is a direct result of its tourism sector.

This analysis also shows that, if the CloS marine fishing industry were to be completely removed, its seafood sector would reduce from 7,800 jobs to around 3,600 jobs.

In summary, the findings clearly show:

- Seafood is proportionally much more important to the CloS economy than it is to the UK economy
- the functional and strategic importance of the CloS catching sector in driving value throughout the CloS seafood industry
- the functional importance of tourism in driving value throughout the CloS seafood industry, including its marine fishing or catching sector.

## 3.11 The value structure of the Cornwall and Isles of Scilly seafood sector

**Table 3.3** shows a summary of the relative contributions of the six seafood industry sub-sectors within the overall CloS seafood industry. The table shows exactly which sub-sectors are responsible for contributing value across each of the four main indicators of value:

- GVA
- Jobs and FTEs
- Wages
- Businesses

The table is divided into two sections: the first section shows the actual value contributions for each indicator and the second section shows the respective percentage contributions of these values towards the overall value total for that indicator of the CloS seafood industry.

All internal seafood industry supply chain impacts between the individual sub-sectors have been removed, so as to remove double-counting; all values are mutually exclusive of one another.

Whilst the table is an excellent source of reference for the absolute seafood sub-sector value contributions to the overall CloS seafood industry, its data is perhaps best illustrated graphically, as in **Figure 3.1** (next spread).



**Table 3.3** The value of the seafood industry in Cornwall and Isles of Scilly and key reference areas

	Direct Values					Total Values (Direct, Indirect, Induced)		
	GVA (£m)	Workforce Jobs	Workforce Job FTEs	Wages (£m)	Businesses	GVA (£m)	Workforce Jobs	Wages (£m)
Marine fishing	22	380	340	10	290	30	460	15
Marine aquaculture	3	30	30	1	10	5	70	2
Seafood processing & wholesale	29	670	610	17	60	42	990	23
Seafood retail	8	330	200	5	470	8	410	5
Seafood food service	69	5,200	3,680	59	820	89	5,850	70
All seafood	130	6,610	4,860	92	1,630	174	7,780	115
	% of Seafood Industry Direct Value Total					% of Seafood Industry Total Value (Direct, Indirect, Induced)		
	GVA (£m)	Workforce Jobs	Workforce Job FTEs	Wages (£m)	Businesses	GVA (£m)	Workforce Jobs	Wages (£m)
Marine fishing	17%	6%	7%	11%	17%	17%	6%	13%
Marine aquaculture	2%	0%	1%	1%	0%	3%	1%	2%
Seafood processing & wholesale	22%	10%	12%	18%	4%	24%	13%	20%
Seafood retail	6%	5%	4%	5%	28%	5%	5%	5%
Seafood foodservice	53%	79%	76%	65%	50%	51%	75%	61%
All seafood	100%	100%	100%	100%	100%	100%	100%	100%

# 3.12 SEAFOOD INDUSTRY VALUE - INDICATOR STRUCTURE BY SUB-SECTOR

Figure 3.1 shows the percentage contribution of each sub-sector of the direct CloS seafood industry to the industry total value for each economic measure. For example, of the sum of the GVA generated by all the sub-sectors of the seafood industry in CloS, 53% of that GVA was generated by seafood foodservice, and 17% by marine fishing.

Overall, the seafood foodservice sub-sector generates the majority of the value, but the value generated depends on the presence and success of the marine fishing sector.

Other key points concerning the value structure of the CloS seafood industry by sub-sector include:

- Foodservice of seafood dominates jobs and wages in the overall CloS seafood industry; seafood foodservice accounts for 79% of all CloS seafood industry jobs and 65% of all CloS seafood industry wages.
- Foodservice of seafood also accounts for around one half of all CloS seafood industry GVA (53%) and businesses (50%).
- Outside of foodservice, the value of the CloS seafood industry is driven by its seafood processing and wholesale sub-sector followed closely by its marine fishing sub-sector – each generally contributes 10% to 20% of value for each indicator, with the exception of number of businesses.
- The seafood retail sub-sector generally contributes about 5% of value for each indicator with the exception of businesses.
- The CloS aquaculture sub-sector makes a very low proportion of contribution, by these measures, to the overall CloS seafood sector.

## 3.13 Seafood industry sub-sector structure by value component

Figure 3.2 shows the contribution made by each sub-sector to the total value of each indicator, for the direct CloS seafood industry.

The CloS marine fishing sub-sector contributed 17% of CloS seafood industry GVA with 6% of its jobs, 11% of its wages and 17% of its businesses, in 2021.

Since marine fishing's GVA contribution is distinctly higher than its jobs contribution we can conclude that the sub-sector contributes relatively higher added value per worker within the overall CloS seafood industry.

A similar situation exists with the CloS seafood processing and wholesale sub-sector; the CloS seafood processing and wholesale sub-sector contributed some 22% of CloS seafood industry total GVA with just 10% of its jobs in 2021. However, the opposite is true of CloS seafood foodservice which generates 53% of CloS seafood GVA with 79% of CloS seafood industry jobs. This is because jobs in the seafood foodservice sub-sector are, on average, far lower value added – due to the lower average wages in this sector – than the overall GVA per worker of the CloS seafood industry overall.

The CloS seafood retail sub-sector has almost average GVA per job; the CloS seafood retail sub-sector contributed 6% of CloS seafood industry GVA with 5% of its jobs.

Finally, the CloS aquaculture industry, small as it is, does appear to be a relatively higher added value per job contributor within the CloS seafood industry overall.

## 3.14 Social inclusion and Community benefits

Interviews for this study revealed a strong sense of the reliance of community integrity and strength on the fishing sector. This could be expected from people working in the seafood sector and would be interesting to test among people living in the area who are not directly involved in the seafood sector. However, there was strong evidence from interviews that the people involved in seafood recognise and acknowledge that fishing is the linchpin of the community.



Figure 3.1 Proportions of value metrics contributed by sub-sectors of the CloS seafood industry.

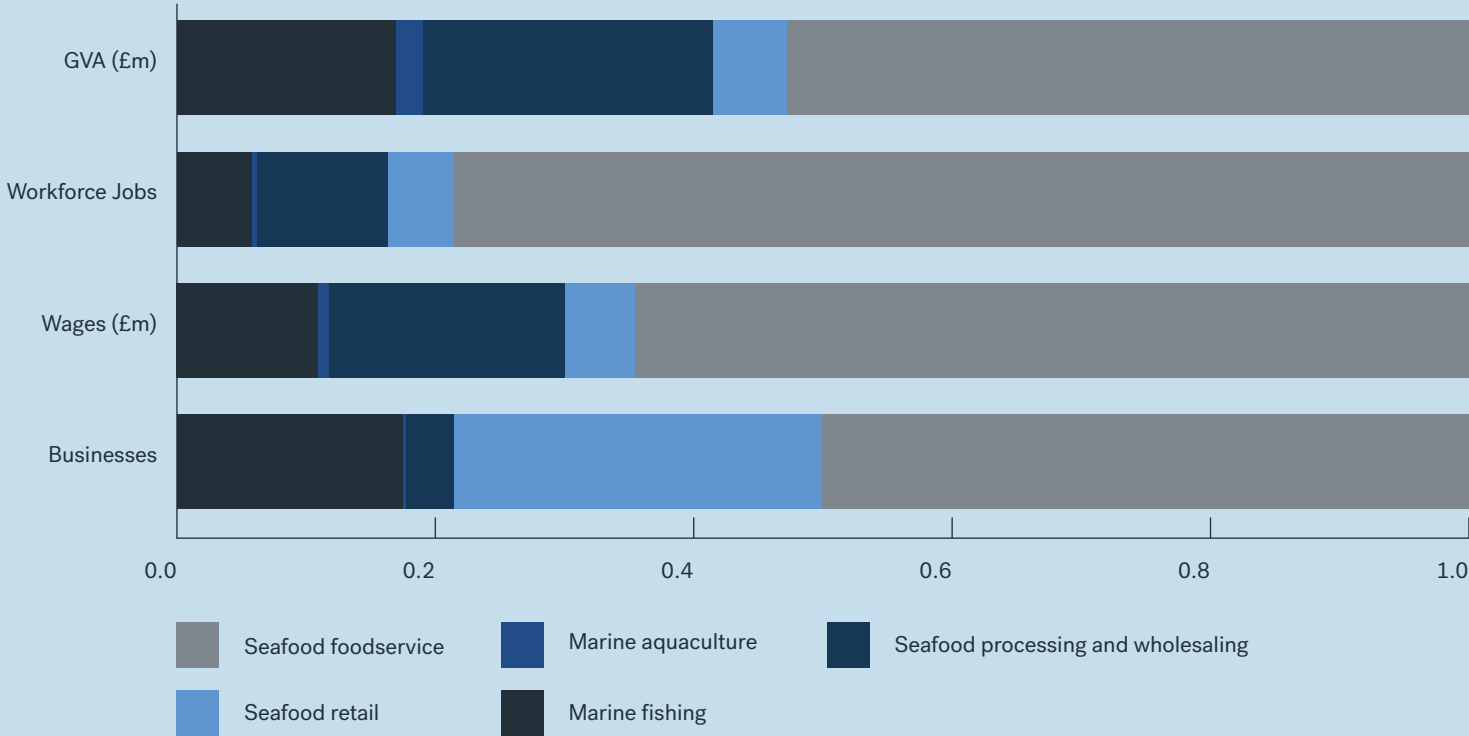
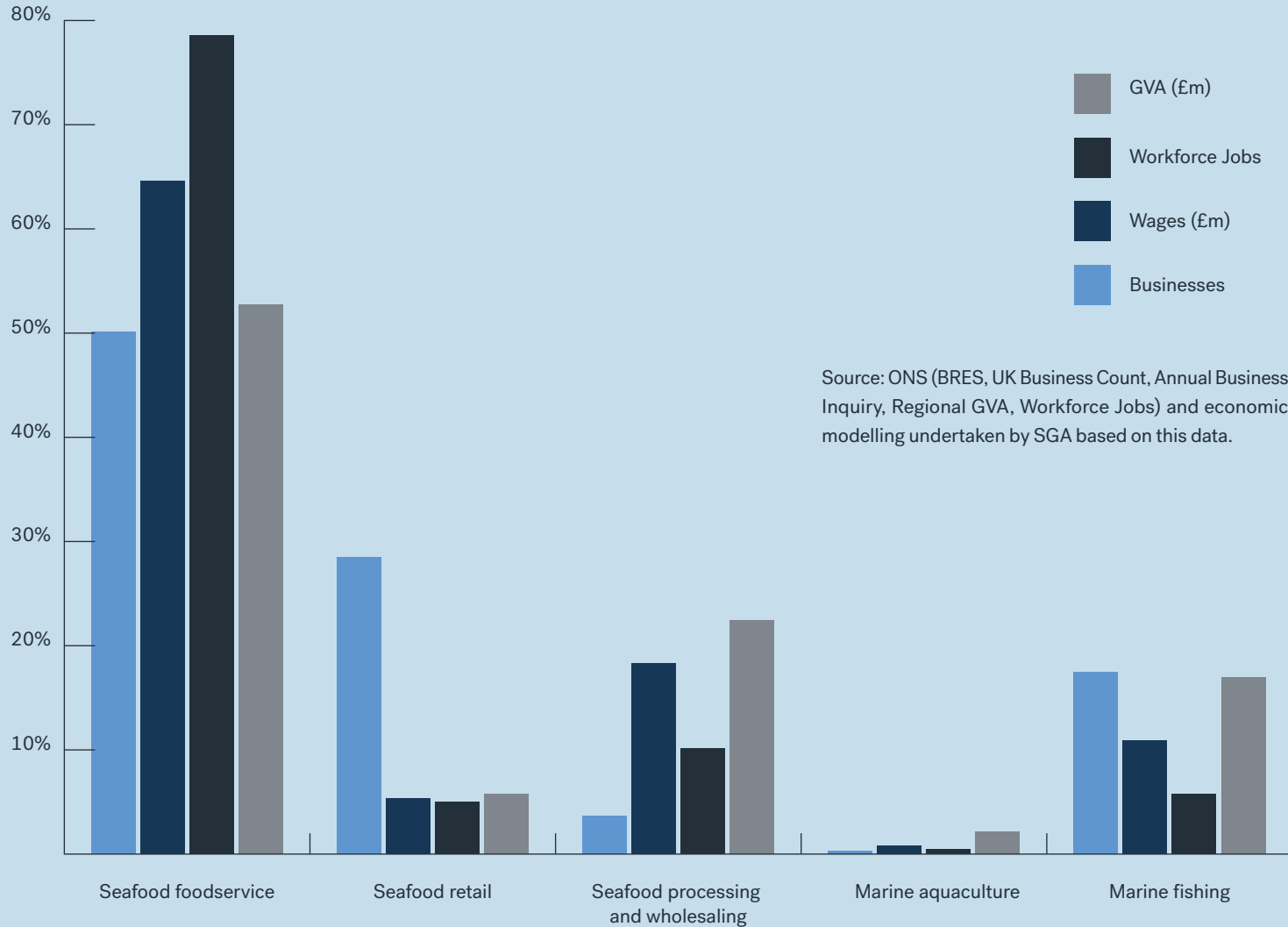


Figure 3.2 Contribution by each sub-sector of CloS seafood industry to the total value of each economic measure.



Source: ONS (BRES, UK Business Count, Annual Business Inquiry, Regional GVA, Workforce Jobs) and economic modelling undertaken by SGA based on this data.







# 4.0 VALUE OF MARINE FISHING IN CORNWALL & ISLES OF SCILLY

Marine fishing is the origin sector of the value generated by seafood in CloS. One fisherman pointed out to the researchers that the Coat of Arms for Cornwall includes a fisherman and a miner, representing the two historically key industries in Cornwall.

The main sources of data presented in this section are business-based economic data sourced from the UK Office for National Statistics (the ONS) based on such datasets as: the UK Annual Business Inquiry (survey), the Business Register & Employment Survey (BRES), UK Business Count, Annual Population Survey, Annual Survey of Hours & Earnings, 2021 Census of Population.

**Table 4.1** shows a combination of official statistics and modelled estimates which illustrate the economic value of the marine fishing sub-sector in CloS.

An in-depth review of the characteristics and performance of the marine fishing sector is presented in Chapter 10.

## 4.1 Overview of the CloS marine fishing sector

The catching sector in CloS includes a small number of multi-vessel businesses and hundreds of single vessel businesses. Vessels based in or mostly landing in CloS range from very small vessels, used only a few days per year, to a small number of larger vessels. Vessels based elsewhere in the UK and foreign-registered vessels also land in CloS, and these businesses also contribute to the overall value of seafood in the county.

## 4.2 GVA

The direct impact of the CloS marine fishing sector is estimated at £22 million in 2021, or £30 million when supply chain (upstream) and induced effects are included. This represented 0.2% of CloS total GVA across all industry (0.3% with supply chain and induced impacts).

CloS fishing accounted for 36% of the South West regional marine fishing sector, 16% of England's fishing sector and 4% of the Great Britain fishing sector in 2021.

## 4.3 Employment

CloS marine fishing accounted directly and indirectly for 380 workforce jobs (340 FTEs) in 2021, or 460 workforce jobs when supply chain (upstream) and induced effects are included. This represented around 0.1% to 0.2% of all CloS jobs across all industries.

Marine fishing jobs in CloS represented 36% of South West regional fishing jobs and 16% and 4% of fishing jobs, respectively, in England and Great Britain in 2021.

## 4.4 Wages

Wages generated in CloS marine fishing were estimated at £10 million for 2021, which was 0.2% of wages for all CloS industry. Including upstream and induced wages, the estimate is £15 million in 2021.

CloS fishing accounted for 31% of the South West regional marine fishing sector, 14% of England's fishing industry and 3% of the Great Britain fishing sector in 2021.

## 4.5 Number of businesses

The CloS marine fishing sector comprised 285 registered businesses in 2021, equivalent to 1.0% of all CloS businesses. CloS fishing businesses accounted for almost half (48%) of the South West region's fishing businesses, 22% of England's and 8% of Great Britain fishing businesses.

The CloS fishing sector accounts for 4% of Great Britain's marine fishing jobs, but it accounts for 8% of GB fishing businesses. This finding suggests that CloS fishing businesses are, on average, half the employment size of their national (GB) counterparts. Similarly, CloS fishing businesses are approximately three-quarters the employment size of both England's fishing businesses and the South West region's fishing businesses.

The number of businesses is lower than the number of active registered vessels, in part because some businesses own more than one vessel and in part because not all registered vessels are owned by registered businesses. Some are operated on a sole trader basis and would not be reflected in official data on number of businesses.



**Table 4.1** The value of the Cornwall & Isles of Scilly catching sector in summary

Metric Category	Description	Value	% of CloS All Industry	Reference Area Marine Fishing Contribution
Gross Value Added	Direct impact (100% in CloS)	£22m	0.2%	36% of South West 16% of England 4% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£30m	0.3%	36% of South West 16% of England 4% of Great Britain
Workforce Jobs	Direct impact (100% in CloS)	380	0.1%	36% of South West 16% of England 4% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	460	0.2%	36% of South West 16% of England 4% of Great Britain
Workforce Job FTEs	Direct impact (100% in CloS)	340	0.2%	35% of South West 16% of England 4% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	N/A	N/A	N/A
Wages	Direct impact (100% in CloS)	£10m	0.2%	31% of South West 14% of England 3% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£15m	0.2%	31% of South West 14% of England 3% of Great Britain
Businesses	CloS-based businesses involved in seafood production for final consumption anywhere	285	1.0%	48% of South West 22% of England 8% of Great Britain

# 5.0 VALUE OF MARINE AQUACULTURE IN CLOS

Marine aquaculture is by far the smallest sub-sector within the CloS seafood industry overall, with only five recognised businesses, therefore we did not prioritise collecting data directly from operators of aquaculture businesses.

## 5.1 Overview of the CloS marine aquaculture sector

**Table 5.1** shows a combination of official statistics and modelled estimates which illustrate the economic value of the marine aquaculture sub-sector in Cornwall and Isles of Scilly.

## 5.2 GVA

The direct impact of the CloS aquaculture industry is estimated at £3 million in 2021, or £5 million when supply chain (upstream) and induced effects are also considered. This represented 0.0% (rounded) of CloS total GVA across all industry in 2021.

CloS aquaculture accounted for 18% of the South West regional aquaculture, 5% of England's aquaculture and 1% of Great Britain aquaculture sector in 2021.

## 5.3 Employment

The CloS aquaculture sector accounted for 30 workforce jobs (30 FTEs), or 70 workforce jobs when supply chain (upstream) and induced effects are also included. This represented 0% of all CloS jobs across all industries in 2021.

Aquaculture jobs in CloS represented 18% of South West regional aquaculture jobs, 5% of England aquaculture jobs and 1% of Great Britain aquaculture jobs in 2021.

## 5.4 Wages

CloS aquaculture generated an estimated £1 million in wages for its workers, or £2 million when supply chain (upstream) and induced wages are also considered. These represent 0.0% of total CloS wages across all industries in 2021.

CloS aquaculture accounted for 16% of South West regional aquaculture wages, 4% of England's aquaculture wages and 1% of Great Britain aquaculture sector wages in 2021.

## 5.5 Number of businesses

Official data recognised five aquaculture businesses in CloS in 2021, equivalent to 0.0% of all CloS businesses. This means less than 0.05%, therefore rounded to 0.0%.

CloS aquaculture businesses accounted for 14% of the South West region's aquaculture businesses, 4% of England's aquaculture businesses and 1% of Great Britain aquaculture businesses in 2021.

## 5.6 Drivers of value in CloS marine aquaculture

This small sector relies almost entirely on shellfish in CloS, given the characteristics of the coastal environment.

We found evidence of restaurants featuring locally grown mussels, and concluded therefore the availability of locally sourced farmed shellfish for those restaurants making a feature of local seafood is noteworthy to some businesses.



**Table 5.1** The value of Cornwall & Isles of Scilly marine aquaculture in summary

Metric Category	Description	Value	% of CloS All Industry	Reference Area Aquaculture Contribution
Gross Value Added	Direct impact (100% in CloS)	£3m	0.0%	18% of South West 5% of England 1% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£5m	0.0%	18% of South West 5% of England 1% of Great Britain
Workforce Jobs	Direct impact (100% in CloS)	30	0.0%	18% of South West 5% of England 1% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	70	0.0%	18% of South West 5% of England 1% of Great Britain
Workforce Job FTEs	Direct impact (100% in CloS)	30	0.0%	22% of South West 6% of England 1% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	N/A	N/A	N/A
Wages	Direct impact (100% in CloS)	£1m	0.0%	16% of South West 4% of England 1% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£2m	0.0%	16% of South West 4% of England 1% of Great Britain
Businesses	CloS-based businesses involved in seafood production for final consumption anywhere	5	0.0%	14% of South West 4% of England 1% of Great Britain

# 6.0 VALUE OF SEAFOOD PROCESSING AND WHOLESALE IN CLOS

In addition to official Office for National Statistics and Annual Business Survey data for this sector, we have considered data provided by Seafish from their seafood processing sector survey and made reference to data collected from processing businesses for this research. Despite different data collection techniques and definitions, there is strong consistency between the three data sources, giving a high level of confidence in the estimates presented.

The definition that Seafish uses to categorise a processing business requires the processing of marine seafood species to account for at least 50% of revenue in the reference year. Individual businesses may change their activities from year to year therefore some firms might fall into the category in some years but not in others.

Official ONS data uses SIC classification, which does not tend to vary annually and may lead to a slightly different population of businesses from year to year.

For this study, we identified companies involved in processing and wholesale of seafood based on existing knowledge of the industry, triangulation and standard research interviews, and internet searches for all feasible terms, including fish processing, fish processor, seafood processing and seafood processor.

## 6.1 Overview of the CloS seafood processing and wholesale sector

Several of the businesses involved in processing and wholesale of seafood in CloS, as in much of the UK, carry out both activities. Though these sectors are sometimes assessed and considered separately, the researchers felt there was no benefit to attempting to group a fairly small number of CloS businesses into two distinct categories when most of them carry out both activities.

**Table 6.1** shows a combination of official statistics and modelled estimates illustrating the economic value of the combined CloS seafood processing and wholesale sector in 2021.

## 6.2 GVA

The direct impact of the CloS seafood processing and wholesale industry is estimated at £29 million in 2021, or £42 million when supply chain (upstream) and induced effects are also considered. This represented 0.3% to 0.4% of CloS total GVA across all industry.

CloS seafood processing and wholesale accounted for 22% to 24% of South West regional seafood processing and wholesale, 3% of England's seafood processing and wholesale and 2% of Great Britain seafood processing and wholesale sector in 2021.

## 6.3 Employment

The CloS seafood processing and wholesale industry accounted for 670 workforce jobs (610 FTEs) in 2021, or 1,000 workforce jobs when supply chain and induced effects are included. This represented 0.2% of all CloS jobs across all industries for direct jobs and 0.4% for jobs including supply chain and induced impacts.

Seafood processing and wholesale jobs in CloS represented 24% to 25% of South West seafood processing and wholesale jobs, 3% of England seafood processing and wholesale jobs, and 2% of Great Britain seafood processing and wholesale jobs in 2021.

## 6.4 Wages

CloS seafood processing and wholesale generated an estimated £17 million in wages for its workers in 2021, and £23 million when supply chain and induced wages are included. These represented 0.3% to 0.4% of total CloS wages across all industries in 2021.

CloS seafood processing and wholesale accounted for 21% to 22% of South West regional seafood processing and wholesale wages and 2% of both England's and Great Britain's seafood processing and wholesale industry wages in 2021.

## 6.5 Number of businesses

The number of businesses falling into the official data categories for seafood processing and wholesale was 60 in 2021, equivalent to 0.2% of all CloS businesses.

CloS seafood processing and wholesale businesses accounted for 29% of the South West region's seafood processing and wholesale businesses, 4% of England's seafood processing and wholesale businesses and 3% of Great Britain seafood processing and wholesale businesses in 2021.

The number of businesses in the official data for processing and wholesale of seafood is higher than the number identified by Seafish, which was for processors only.

Seafish estimates show the number of seafood processing sites (which may include businesses with more than one site) in CloS is 21 in 2022 (data for 2021 were not available). Research for this study identified 23 businesses.



The additional businesses in the official data set, relative to Seafish figures and research for this project, include those that are wholesalers only and may include some non-seafood wholesalers included in the category. Overall, we are not concerned about differences in estimates, given the differences in definitions and inclusion.

#### 6.6 Drivers of value in CloS seafood processing and wholesale

CloS has more smaller businesses and fewer larger businesses in seafood processing. Seafish provided analysis of number of business by seafood type and by size of business as determined by number of FTE jobs, see **table 6.3**.

<b>Table 6.2</b> Number of sites in CloS by business type in 2022.	
Business Type 2022	Number of sites
Seafood Majority processor	21
Seafood Minority processor	7
Seafood Non-processor	2

Source: Seafish response to enquiry.

<b>Table 6.3</b> Number of majority seafood processing sites by size band & species type in 2022.			
	Species Type		
Size band	Mixed	Shellfish	Total
FTE 1-10	8	5	13
FTE 11-25	1	1	2
FTE 26-50	2	2	4
FTE 50+	2		2
Total	13	8	21

Source: Seafish response to enquiry.

<b>Table 6.4</b> Number of majority seafood processing sites and FTE jobs by size band in 2022.		
Over 80% of jobs were in the smaller number of larger firms.		
Size band of site	Number of sites	No. of FTE jobs
<25 FTEs	15	101
>25 FTEs	6	421
Total	21	522

Source: Seafish response to enquiry.

**Table 6.1** The value of the Cornwall & Isles of Scilly seafood processing and wholesale sector in summary in 2021.

Metric Category	Description	Value	% of CloS All Industry	Reference Area Processing & Wholesale Contribution
Gross Value Added	Direct impact (100% in CloS)	£29m	0.3%	24% of South West 3% of England 2% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£42m	0.4%	22% of South West 2% of England 2% of Great Britain
Workforce Jobs	Direct impact (100% in CloS)	670	0.2%	24% of South West 3% of England 2% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	1,000	0.4%	25% of South West 3% of England 2% of Great Britain
Workforce Job FTEs	Direct impact (100% in CloS)	610	0.3%	25% of South West 3% of England 2% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	N/A	N/A	N/A
Wages	Direct impact (100% in CloS)	£17m	0.3%	21% of South West 2% of England 2% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£23m	0.4%	22% of South West 2% of England 2% of Great Britain
Businesses	CloS-based businesses involved in seafood production for final consumption anywhere	60	0.2%	29% of South West 4% of England 3% of Great Britain





# 7.0 VALUE OF SEAFOOD RETAIL IN CLOS

The retail sector selling seafood in CloS includes specialist fishmongers, convenience stores and supermarkets.

## 7.1 Overview of the CloS seafood retail sector

**Table 7.1** shows a combination of official statistics and modelled estimates which illustrate the economic value of the combined retail sector in CloS.

## 7.2 GVA

The direct impact of the CloS fish retail industry is estimated at £8 million of GVA in 2021, or £9 million when supply chain (upstream) and induced effects are included. This represented 0.1% of CloS total GVA across all industry.

CloS seafood retail accounted for 11% to 12% of South West regional fish retail and 1% of both England's and Great Britain's fish retail sectors in 2021.

## 7.3 Employment

Seafood retail in CloS accounted for 330 workforce jobs (200 FTEs) in 2021, or 410 workforce jobs when supply chain (upstream) and induced effects are included. This represented 0.1 to 0.2% of all CloS jobs across all industries in 2021.

Seafood retail jobs in CloS represented 13% of South West seafood retail jobs, 2% of England seafood retail jobs, and 1% of Great Britain seafood retail jobs in 2021.

## 7.4 Wages

CloS seafood retail generated an estimated £5 million in wages for its workers in 2021, both directly and when supply chain and induced wages are also considered. These represented 0.1% of total CloS wages across all industries.

Seafood retail in CloS accounted for 11% of South West regional seafood retail wages and 1% of both England's seafood retail wages and Great Britain's seafood retail wages in 2021.

## 7.5 Number of businesses

The CloS seafood retail industry comprised 465 registered businesses in 2021, equivalent to 1.6% of all CloS businesses.

CloS seafood retail businesses accounted for 12% of the South West region's seafood retail businesses and 1% of both England's seafood retail businesses and Great Britain's seafood retail businesses in 2021. This is due to rounding and the relative size of the economy of England to the economy of GB.

## 7.6 Drivers of value in CloS seafood retail

The proximity and visibility of the catching sector in Cornwall gives a strong cultural backdrop to seafood retail. Seafood specialist retailers in Cornwall cater to tourists and visitors as well as to locals and form an important connection point between visitors, locals and the seafood industry as a whole. Research interviews suggested that visitors feel differently about purchasing seafood from a specialist fishmonger within sight of a harbour of fishing boats, and the purchase forms part of their tourist experience in CloS.

**Table 7.1** The value of the Cornwall & Isles of Scilly seafood retail sector in summary

Metric Category	Description	Value	% of CloS All Industry	Reference Area Seafood Retail Contribution
Gross Value Added	Direct impact (100% in CloS)	£8m	0.1%	11% of South West 1% of England 1% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£9m	0.1%	12% of South West 1% of England 1% of Great Britain
Workforce Jobs	Direct impact (100% in CloS)	330	0.1%	13% of South West 2% of England 1% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	410	0.2%	13% of South West 2% of England 1% of Great Britain
Workforce Job FTEs	Direct impact (100% in CloS)	200	0.1%	13% of South West 2% of England 1% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	N/A	N/A	N/A
Wages	Direct impact (100% in CloS)	£5m	0.1%	11% of South West 1% of England 1% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£5m	0.1%	11% of South West 1% of England 1% of Great Britain
Businesses	CloS-based businesses involved in seafood production for final consumption anywhere	465	1.6%	12% of South West 1% of England 1% of Great Britain

# 8.0 VALUE OF SEAFOOD FOODSERVICE IN CLOS

Restaurants, cafés and other foodservice businesses in CloS have a stronger focus on seafood than these businesses do typically across the UK. Seafood consumption through the foodservice sector is more important to CloS than it is to the UK on the whole. The researchers attribute this to the presence and proximity of a catching sector distributed widely and visibly throughout CloS, together with the popularity of the region as a tourist destination and the higher incidence of eating out of home in tourist areas.

Nationally, the proportion of seafood consumed out of home is around 36%<sup>1</sup> but in CloS, based on our analysis of restaurants specialising in or serving seafood, and on the population of CloS, we estimate that a substantially higher proportion of seafood consumed in CloS is purchased from the foodservice sector. This difference is intrinsically linked to the tourism sector.

Data specific to foodservice outlets is not available from the ONS UK Business Count data series or the ONS BRES dataset. In order to overcome this data gap the authors of this report researched and analysed TripAdvisor data by area (<https://www.tripadvisor.co.uk/>). This analysis also involved a detailed comparison, and alignment, between official ONS data and TripAdvisor data.

## 8.1 Overview of the CloS seafood foodservice sector

For the most part, the seafood foodservice sector comprises the sale of seafood in:

- Specialised seafood table service restaurants
- Table service restaurants, pubs and cafés featuring and serving seafood but not classified as a specialised seafood restaurant
- Fish & Chip and other seafood takeaways

**Table 8.1** shows a combination of official statistics and modelled estimates which illustrate the economic value of the combined seafood foodservice sector in CloS

## 8.2 GVA

The direct impact of seafood foodservice in CloS is estimated at £69 million in 2021, or £89 million when supply chain and induced effects are included. This represented 0.6% to 0.8% of CloS total GVA across all industry in 2021.

Seafood foodservice in CloS accounted for 25% of South West regional seafood foodservice sector, 4% of England's seafood foodservice and 3% of the Great Britain seafood foodservice in 2021.

## 8.3 Employment

Seafood foodservice in CloS accounted for 5,200 workforce jobs (3,680 FTEs) in 2021, or 5,850 workforce jobs when supply chain and induced effects are included. This represented 1.7% to 1.9% of all CloS jobs across all industries for direct jobs and 2.2% for CloS jobs including supply chain (upstream) and induced impacts.

Seafood foodservice jobs in CloS represented 29% of South West seafood foodservice jobs and 5% of both England and Great Britain seafood foodservice jobs.

## 8.4 Wages

CloS seafood foodservice generated an estimated £59 million in wages for its workers, or £70 million when supply chain (upstream) and induced wages are included. These represented 0.9% to 1.1% of total CloS foodservice wages across all industries.

CloS seafood foodservice accounts for 25% of South West regional seafood foodservice industry wages, 4% of England's seafood foodservice industry wages and 3% of Great Britain's seafood foodservice industry wages.

## 8.5 Number of businesses

The CloS seafood foodservice industry comprises 820 registered businesses, equivalent to 2.8% of all CloS businesses.

CloS seafood foodservice businesses (specialising in or featuring seafood) account for 18% of the South West region's seafood foodservice businesses and 2% of both England's seafood foodservice businesses and Great Britain's seafood foodservice businesses

## 8.6 Drivers of value in CloS seafood foodservice

Seafood foodservice, heavily dependent on tourism, is spread throughout CloS, including inland areas, to an extent that catching and aquaculture are not, thus bringing the benefits of the overall sector throughout the area.

## 8.7 Geographical context for seafood foodservice

The research for seafood foodservice revealed that in CloS there were over 950 food takeaway businesses, of which 154 or 16% were fish and chip shops. In the south west of England around 9% of takeaways are fish and chip shops and in the UK, around 7% of takeaways are fish and chip shops. Fish and chip shops form a higher proportion of food takeaways in CloS than in SW England and in the UK.

Among the 820 seafood foodservice businesses counted in CloS were 157 seafood cuisine table service restaurants, 16% of table service restaurants in CloS. In south west England seafood restaurants are around 6% and in UK seafood restaurants are around 4% of all table service restaurants.

The 157 CloS seafood cuisine restaurants represent over 10% of the UK total of around 1,100 seafood restaurants.

We conclude that this over-representation of seafood among foodservice businesses in CloS is as a result of the inter-dependence of fishing, tourism and foodservice.

<sup>1</sup> Seafood Consumption (2022 Update). R. Watson. Seafish.



**Table 8.1** The value of the CloS seafood foodservice sector in summary

Metric Category	Description	Value	% of CloS All Industry	Reference Area Seafood Foodservice Contribution
Gross Value Added	Direct impact (100% in CloS)	£69m	0.6%	25% of South West 4% of England 3% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£89m	0.8%	25% of South West 4% of England 3% of Great Britain
Workforce Jobs	Direct impact (100% in CloS)	5,200	1.9%	29% of South West 5% of England 5% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	5,850	2.2%	29% of South West 5% of England 5% of Great Britain
Workforce Job FTEs	Direct impact (100% in CloS)	3,680	1.7%	29% of South West 5% of England 5% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	N/A	N/A	N/A
Wages	Direct impact (100% in CloS)	£59m	0.9%	25% of South West 4% of England 3% of Great Britain
	Total impact including direct, supply chain and induced impacts (over 90% in CloS)	£70m	1.1%	25% of South West 4% of England 3% of Great Britain
Businesses	CloS-based businesses involved in seafood production for final consumption anywhere	820	2.8%	18% of South West 2% of England 2% of Great Britain

# 9.0 VALUE OF UPSTREAM BUSINESSES

## 9.1 Introduction and methodology

Businesses within each of the seafood industry sub-sectors analysed in this report rely on a combination of suppliers of goods and services in order to add their own value (their GVA as measured in this report). For the sake of analysis, these suppliers can be based: locally (in CloS); regionally (outside of CloS across the rest of the South West); nationally in the UK (but outside of the South West); internationally (and imported).

Upstream businesses identified in CloS included chandlers, fuel retailers, food retailers, boat yards, maintenance service providers, e.g. engineers, and suppliers of business services, such as marketing, accountants, legal services, banking, harbour services, quota management, etc.

Outside of marine fishing, each of the seafood industry sub-sectors is heavily reliant on supplies of whole, head-on gutted, or processed fish. In order to estimate the value of upstream business in the CloS seafood industry it is necessary to remove all traces of supplies of locally landed seafood (or reared seafood in the case of aquaculture). To not remove local seafood supplies between seafood industry sub-sectors would lead to significant double-counting.

Removing locally sourced seafood from CloS seafood industry supply chain calculations is not straightforward, as some fish is imported into CloS from outside of the area (i.e. from the South West, rest of UK or outside of the UK), and estimating it requires detailed supply chain information from each sub-sector as to the quantity and exact source of their fish.

Without such detailed information we have estimated seafood in the CloS supply chain by attempting to remove all seafood from the local seafood industry supply chain. The result of this assumption, whilst simplifying matters, means that the CloS seafood supply chain and seafood-related supply chain induced impacts that occur outside of CloS in the South West or rest of UK, are not considered. However, as this study is focused primarily on the impact of seafood within CloS, this is not necessarily an issue, and this particular section only considers supply chain and induced impacts of the seafood industry within CloS.

The approach taken to calculate supply chain and induced impacts was to source proxy industry Input/Output data and Type I (supply chain) multipliers and Type II (induced) multipliers from the Scottish Government<sup>2</sup> for the following sectors:

- Fishing
- Aquaculture
- Fish & fruit processing
- Wholesale - excluding vehicles
- Retail - excluding vehicles
- Food & beverage services

Each of these multipliers was adjusted to remove seafood supplies, or seafood and food supplies, as appropriate. (Fish and food supplies have to be removed as most of the Scottish Government multipliers are generic and do not specifically cover fish processing, fish wholesale, fish retail, fish foodservice.)

Fish and food impacts were removed from multipliers by calculating the proportion of fish (and food) in their upstream supply chain from the Input/Output tables which underpin the multipliers.

The application of multipliers and input/output information from the Scottish Government assumes that the CloS seafood sub-sectors supplies – not including supplies of fish and seafood – are structured in a similar way to their Scottish (proxy) counterpart sectors in terms of their composition, and that similar proportions of their supplies are sourced from within CloS as they are in Scotland.

On the first of these assumptions, we suggest that CloS industry (industry in general, not the seafood industry) has, on the whole, similar purchasing behaviour to general industry in Scotland. Whilst CloS is far smaller than Scotland both areas are peripheral, and largely rural and coastal. Because of these common characteristics it seems that CloS industry purchasing patterns are broadly similar to those in Scotland, and that this proxy is useful to apply.

On the second assumption, concerning similarities in the geographic source of supplies, the extraction of fish and food from the proxy sectors means that the only supply chain impacts considered in our analysis are non-fish and non-food goods and services. These are, first, likely to be fairly minimal, and, second, likely to have a high proportion of suppliers based in CloS (as outside of fish and food the main suppliers are likely to be local services). The possible exception to this latter issue is larger grocery retailers, such as supermarkets, which use services in accounting and marketing etc based outside CloS. However, the supply chain impacts of retail, outside of food and fish, are quite minimal.

Since supply chain impacts outside of fish and food are quite minimal, this also means that the supply chain-related induced impacts will be minimal (most of the induced impact of a sub-sector will be driven by its direct workers in CloS).

For all the above reasons, we suggest that the use of adjusted proxy multipliers from Scotland enables us to derive some fairly robust 'ball-park' estimates of supply chain and induced impacts of the CloS seafood industry.

<sup>2</sup> Equivalent figures were not available for any other part of the UK

**Table 9.1** Direct impacts on each key indicator and supply chain (upstream) plus induced impacts.**Workforce Jobs**

Area	Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs
Marine Fishing	380	40	40	460
Marine Aquaculture	30	30	10	70
Seafood Processing & Wholesale	670	210	110	990
Seafood Retail	330	40	40	410
Seafood Foodservice	5,200	310	340	5,850
All Seafood	6,610	630	540	7,780
All Industry	N/A	N/A	N/A	268,820

**GVA (£ million)**

Area	Direct GVA	Supply Chain + Induced GVA	Total GVA
Marine Fishing	22	7.6	29.6
Marine Aquaculture	2.8	2.6	5.4
Seafood Processing & Wholesale	29.2	12.8	41.9
Seafood Retail	7.5	0.9	8.5
Seafood Foodservice	68.7	20	88.8
All Seafood	130.2	43.9	174.2
All Industry	N/A	N/A	11,661

**Wages (£ million)**

Area	Direct Wages	Supply Chain + Induced Wages	Total Wages
Marine Fishing	10	4.7	14.8
Marine Aquaculture	0.8	1.3	2
Seafood Processing & Wholesale	16.8	6.2	23
Seafood Retail	5	0.4	5.4
Seafood Foodservice	59.4	10.8	70.2
All Seafood	92	23.3	115.3
All Industry	N/A	N/A	6,491



## 9.2 Overview of upstream businesses

**Table 9.1** shows the direct impacts on each key indicator (jobs, GVA, wages) alongside the supply chain and induced impacts and the total sub-sector impact for each indicator. The data for each CloS seafood industry sub-sector, and the overall CloS seafood industry, are shown in the table. A summary of findings for each sub-sector and the overall seafood industry can be found below the table.

### 9.3 Marine fishing

While many of the major fixed asset purchases made by the catching sector of fishing businesses based in CloS are made in other regions of the UK or imported from outside of the UK, there is still much local expenditure on services, parts and build of smaller vessels.

Larger, multi-vessel catching sector businesses may employ staff within the company to carry out activities that smaller firms would purchase from other suppliers. Most vessels in CloS do not operate as part of a large business with these services provided in-house, and instead purchase them from other businesses, in CloS and further afield.

Smaller boat yards, manufacturing and repairing smaller boats, are a key and important element of the upstream sector in CloS. It was not possible as part of this research to estimate the value of these boat yards, but given that the reliance on landings by smaller boats is greater than the national average, we conclude that services and supplies to smaller boats is clearly an essential part of the industry in CloS.

Official data source (BRES) shows that there are 175 employee jobs in boatbuilding in CloS, and it seems reasonable to assume that a good portion of these will be related to marine fishing. The table above shows that there are an estimated 40 jobs in the CloS supply chain in marine fishing, and we suggest that a good proportion of these 40 jobs will be located in the boatbuilding industry.

The people holding the 40 supply chain related jobs and the 380 direct jobs in marine fishing in CloS, spend their incomes on final goods and services in the local economy. It is estimated that this induced impact is also around 40 additional jobs.

Combined, the direct, indirect and induced jobs impact of marine fishing in CloS is an estimated 460 total workforce jobs. The direct GVA impact of around £22.0 million compares to around £29.6 million when supply chain and induced impacts are included along with the direct impact of marine fishing. Similarly, the £10.0 million of direct wages in marine fishing compares to a total impact of around £14.8 million when further impacts are included alongside the direct wages impact of marine fishing.

### 9.4 Marine aquaculture

Combined, the direct, indirect and induced jobs impact in CloS marine aquaculture is an estimated 70 total workforce jobs (compared to 30 direct jobs). The direct GVA impact of around £2.8 million compares to around £5.4 million when supply chain and induced impacts are included along with the direct impact of aquaculture. The £0.8 million of direct wages in aquaculture compares to a total impact of around £2.0 million when further impacts are considered alongside the direct wages impact of marine aquaculture.

### 9.5 Seafood processing & wholesale

Combined, the direct, indirect and induced jobs impact in CloS seafood processing and wholesale is an estimated 990 total workforce jobs (compared to 670 direct jobs). The direct GVA impact of around £29.2 million compares to around £41.9 million when supply chain and induced impacts are included along with the direct impact of seafood processing and wholesale. The £16.8 million of direct wages in aquaculture compares to a total impact of around £23.0 million when further impacts are included alongside the direct wages impact of seafood processing and wholesale.

### 9.6 Seafood retail

Combined, the direct, indirect and induced jobs impact in CloS seafood retail is an estimated 410 total workforce jobs (compared to 330 direct jobs). The direct GVA impact of around £7.5 million compares to around £8.5 million when supply chain and induced impacts are included along with the direct impact of seafood retail. The £5.0 million of direct wages in seafood retail compares to a total impact of around £5.4 million when further impacts are included alongside the direct wages impact of seafood retail.

### 9.7 Seafood foodservice

Combined, the direct, indirect and induced jobs impact in CloS seafood foodservice is an estimated 5,850 total workforce jobs (compared to 5,200 direct jobs). The direct GVA impact of around £68.7 million compares to around £88.8 million when supply chain and induced impacts are included along with the direct impact of seafood foodservice. The £59.4 million of direct wages in seafood retail compares to a total impact of around £70.2 million when further impacts are included alongside the direct wages impact of seafood foodservice.

### 9.8 All seafood

Combined, the direct, indirect and induced jobs impact in the CloS seafood industry is an estimated 7,780 total workforce jobs (compared to 6,610 direct jobs). The direct GVA impact of around £130.2 million compares to around £174.2 million when supply chain and induced impacts are included along with the direct impact of seafood foodservice. The £92.0 million of direct wages in seafood retail compares to a total impact of around £115.3 million when further impacts are included alongside the direct wages impact of seafood foodservice.





# 10.0 DRIVERS OF VALUE IN CLOS MARINE FISHING

Marine fishing is the origin sector of the overall seafood sector for CloS therefore in this chapter we present a more detailed analysis of the sub-sector than for other sub-sectors.

This chapter includes a detailed analysis of the economic value of the CloS marine fishing sector (often also referred to as the catching sector). There are two main sources of data presented:

1. Vessel-based economic data sourced from Seafish, mainly via the Seafish Fleet Enquiry Tool and also from responses to enquiries to Seafish Economics. CloS data are final estimates for 2021; UK, England, SW figures are provisional estimates for 2021, the most up to date available at the date of this report.
2. Landings and operational data from the Marine Management Organisation, analysed by the researchers for this report.

## 10.1 Fleet definition

Some UK fishing vessels are registered in and operated from a single port, but many operate from and land in more than one port during each year. For this analysis, we have used data provided by Seafish which includes vessels that had the largest single share of landings from ports in CloS in 2021. We refer to these as vessels with top port CloS. The vessels that fall within this group include those that only landed in CloS, those that sometimes landed outside of CloS and those that landed less than 50% of their value in CloS, but for which CloS was the most valuable single place of landing. For instance, there might be a scallop vessel that fished and landed around the UK in several places, but the single most valuable place of landing was in Cornwall. However, most of the vessels included made the majority or all of their landings value in CloS in 2021.

## 10.2 Overview of estimates derived from Seafish vessel data

This section relies substantially on data from Seafish and MMO as well as data collected by interviews and analysed for this project.

Estimates of GVA, FTEs, wages etc by Seafish differ from those obtained from ONS data for several reasons, particularly that many smaller businesses are not included in the ONS data set and that the larger businesses tend to have in-house staff doing tasks and activities that are more typically contracted out by smaller businesses. For instance, a large, multi-vessel company may employ administrative and engineering staff, increasing the wages earned by the catching sector business compared to a situation in which e.g. 10 separate catching businesses which purchase administrative and engineering services from other firms, in which case this work would be deemed to be done by suppliers to the catching sector, rather than by the sector itself.

The Seafish Fleet Enquiry Tool<sup>3</sup> is a rich resource and there are two key things to note about figures for selected regions. Users can select a NUTS1 (e.g. South West England) or NUTS2 (e.g. CLOS) area, and the figures presented are for vessels with top port of landing in the selected area. If a UK home nation area (e.g. Wales) is selected, the figures presented are for vessels registered in that home nation.

## 10.3 Economic overview of the UK, SW and CloS marine fishing sectors

The value of landings by vessels with top port in Cornwall accounted for 5% of the value of UK fleet landings in 2021, and for 15% of landings by vessels registered in England<sup>4</sup>.

UK fishing vessels registered in England, Scotland, Northern Ireland and Wales landed £913 million<sup>5</sup> first sale value of seafood in 2021. There were 4,269 active vessels<sup>6</sup>. Vessels registered in the Channel Islands and Isle of Man landed seafood worth an additional £7.7 million in 2021.

The value of UK landings into all ports and foreign vessel landings into UK ports was £942 million in 2021. Vessels registered in England landed £285 million of seafood.

There were 1,000 active vessels with top port in the South West of England which together landed £108 million of seafood in 2021<sup>7</sup>.

## 10.4 GVA

While our estimate of GVA based on official data and modelling is £22 million for the CloS marine fishing sector, Seafish estimates GVA based on business performance analysis of each vessel with top port of landing in CloS, and their estimate for 2021 is £20.5 million<sup>8</sup>. These two estimates being so close, despite different business data collection methods, gives substantial reassurance in the accuracy of the estimates.

## 10.5 Number of vessels and fishing businesses

Throughout the UK most catching businesses in the fishing industry are single vessel businesses, with a minority of businesses operating more than one vessel.

Seafish provides time series data on the number of vessels with the Top Port Cornwall, showing a 19% decline in numbers from 2011 to 2021. This compares to a reduction of 11% for UK vessel numbers over the same period<sup>9</sup>.

<sup>3</sup> <https://public.tableau.com/app/profile/seafish/viz/FleetEnquiryTool/1Overview>

<sup>4</sup> MMO data UK landings into all ports & foreign landings into UK ports 2021

<sup>5</sup> MMO data UK landings into all ports & foreign landings into UK ports 2021

<sup>6</sup> Seafish Fleet Enquiry Tool, provisional figures for 2021

<sup>7</sup> Seafish Fleet Enquiry Tool, provisional figures for 2021

<sup>8</sup> Seafish response to enquiry, vessels with top port CloS 2021, final figures for 2021

<sup>9</sup> Seafish data provided in response to enquiry



**Table 10.1** Value of landings by vessels registered in UK home nations, England, SW and CloS in 2021.

	2021 landings £M	No. of vessels	% UK landings value	% UK vessels	% England landings value	% England vessels
UK (E, S, NI, W)	913	4,269				
England	285	2,017	31%	47%		
SW	108	1,000	12%	23%	38%	50%
CIOs	41	451	4%	11%	14%	22%

Sources: Seafish Fleet Enquiry Tool and MMO data.

**Table 10.2** Total income, Gross Value Added and Operating Profit of UK vessels, England vessels and vessels with top port of landing CloS in 2021.

	All UK home nation registered vessels	Vessels registered in England	Vessels with top port CloS
Total income (fishing and non-fishing)	£923 m	£289 m	£44.2 m
Gross Value Added	£483 m	£132 m	£20.5 m
Operating profit	£240 m	£51 m	£7.2 m

Source: Seafish Fleet Enquiry Tool provision figures for 2021 for UK and England, final figures for 2021 CloS.

**Table 10.3** Vessels with admin port Cornwall

Total fishing income 2021 - £ million					
Vessel length category	24m+	18m-24m	10m-18m	<10m	Total
Number of vessels	13	14	45	376	448
Value of landings (£m)	10.3	10.5	13.3	9.1	43.2

Source: Seafish data

## 10.6 Employment, jobs and size of businesses

Seafish data shows the number of FTE workers in the UK fleet as 6,835 in 2021<sup>10</sup>, a decline of 25% since 2011. For vessels with top port CloS, there were an estimated 410 FTE jobs in 2021, a less steep decline of 18% since 2011.

CloS had on average 0.9 FTE jobs per boat in 2021, while UK had 1.6 FTE jobs per boat and England had on average 1.3 FTEs per boat<sup>11</sup>. This difference is because there is a higher proportion of lower activity and smaller vessels in CloS than in the UK as a whole or in England as a whole, meaning in essence, more part-time boats and workers.

## 10.7 Wages

In marine fishing, payment for labour is made in a number of ways. Traditionally, a crew member (e.g. deckhand, engineer, skipper) would receive a crew share per trip, which depended on the gross earnings and fishing costs for each trip. This method serves to reward success on a trip by trip basis and also shares risk between the vessel owners and the crew. This method is still in operation.

For businesses using smaller vessels, many of which are run on a part-time basis, operated as a sole trader business or as a limited company, the payment for labour and the return on investment to the owner are, in many cases, not separated, where the owner is the main or only worker on the vessel. The owner-operator does not distinguish between payment for their own labour and return on their financial investment.

In Cornwall, there are now a number of overseas contract workers on fishing vessels that work beyond 12 nautical miles from the coast. These workers are paid either wholly or partly via an employment agency in their home country. Some of these workers also receive additional payments from vessel owners, and interviews indicated a desire to reduce the difference in wages between local crew and overseas contract workers.

## 10.8 Business performance, revenues, costs, profit

Seafish fleet economic data for vessels with top port CloS, includes detailed operational and financial performance data for the whole group of vessels, and in the Annex there are tables showing the performance of these vessels split by length group.

The number of vessels and number of FTE jobs both decreased by around 18-19% over the decade to 2021.

Average per vessel fishing income, for all active vessels with top port CloS, increased to £96,500 and average total income increased to £98,700 over the decade to 2021, with an expected blip for 2020, due to covid lockdowns. Total vessel costs have not increased to the same extent over the period, meaning that average operating profit per vessel has increased. The vessels included in the group are not fixed over the time period, there are fewer vessels in total, but there may have been some additions or vessels moving in and out of the category over this time period.

Detailed tables produced by Seafish, showing business and operational performance metrics over the 10 year period for CloS vessels, for four length categories of vessels, are provided in **Annex 1** toward the end of this report.

## 10.9 Effort and operational efficiency

Operational efficiency appears to have improved over the period 2011 to 2021, with average landings per kW day at sea increasing by 23% from 3.5kg to 4.3kg. The percentage increase is slightly higher than for the whole UK fleet, which increased from 6.6kg to 8.0kg per kW day at sea over the same period. This increase could reflect increases to technical catching efficiency and/or stock density.

Average operating profit per FTE job has also increased over the period, in real terms, from £10,600 to £15,700 in 2021.

## 10.10 Over 10 metre fleet

A total of 448 vessels with top port Cornwall landed £43.3 million worth of seafood in 2021, and 79% of the total value (£34.1 million) was landed by the over 10m fleet, around 16% of the number of vessels<sup>12</sup>.

## 10.11 Under 10 metre fleet

CloS has a higher proportion of smaller vessels and part-time workers in its fleet than the UK overall. Of the 356 licenced 10m and under vessels with admin port Newlyn (the only admin port in Cornwall) that operated during 2021, two-thirds (238 vessels) were used to land less than £20,000 each during the year, fishing an average of 26 days at sea in 2021.

<sup>10</sup> ONS estimate of FTE jobs in UK marine fishing sector for 2019 (most recent available) is 7,000

<sup>11</sup> Seafish Fleet Enquiry Tool, provisional figures for UK 2021

<sup>12</sup> Seafish data based on vessels with top port CloS.

**Table 10.4** Under 10m vessels with admin port Newlyn, 2021, grouped by 2021 total fishing income category. FTEs estimated based on survey data, vessel size and days at sea per year, assuming 220 days is a FTE job.

Under 10m vessels with admin port Newlyn				
2021 Fishing income category	<£20k	£20-49.9k	£50k+	Total
No. active vessels	238	59	59	356
Average vessel length (m)	6	7.2	8.7	
Full Time Equivalent jobs	25	23	43	93
Total 2021 fishing income (£M)	1.43	1.97	6.34	9.74
Average fishing income per vessel (£)	6,000	33,400	107,500	
Fishing income per FTE (£)	56,700	78,800	1,478,000	
Average price per tonne (£)	3,567	3,938	3,359	
Average days at sea in 2021	26	66	78	
Operating profit per FTE (£)	8,900	27,000	50,200	

Source: Seafish data





### 10.12 Landings by vessel nationality

Vessel nationality is based on nation of vessel registration, and not on nationality of the owner of the vessel. This means that vessels that are, for example, Dutch owned or Spanish owned, but which are included in the UK vessel register and are required to fulfil economic link obligations, are counted as UK vessels.

Most landings into CloS in 2021 were by vessels registered in England and by vessels whose top port of landing in 2021 was in CloS.

Total 2021 value of landings into CloS by UK vessels was £44,055,794<sup>13</sup>. Including 2021 landings by foreign vessels the total value landed was £44,121,783.

The value at first sale of all 2021 landings, in any port, by vessels with administration port CloS was £40,062,000<sup>14</sup>.

The value at first sale of all 2021 landings, in any port, by vessels with top port CloS was £43,230,000<sup>15</sup>.

Compared to the total value of landings by vessels registered in UK home nations, the value landed by vessels with top port CloS is a small proportion, around 5%. Vessels with top port CloS in 2021 landed around 15% of the value landed by all vessels registered in England.

In 2021, as in the previous few years, almost all landings into CloS were by UK vessels, with Ireland the only other nationality of vessel registration, landing around £66,000, around 0.1% of the total of £44.1 million. Landings by foreign-registered vessels were all into Newlyn, making up around 0.2% of the value of landings into Newlyn. This is a lower percentage of landed value into Newlyn than in previous years, see **table 4.7**,

<b>Table 10.5 2021 Landings into CloS by vessels of home nation and foreign registration.</b>	
<b>Landings into CLOS in 2021</b>	
Vessels registered in UK home nations:	Value £
GB England	43,052,582
GB Northern Ireland	571,036
GB Scotland	377,177
GB Wales	54,896
UK home nations vessels total	44,055,794
<b>Vessels registered overseas:</b>	
IRL – Republic of Ireland	65,990
Grand Total	44,121,783

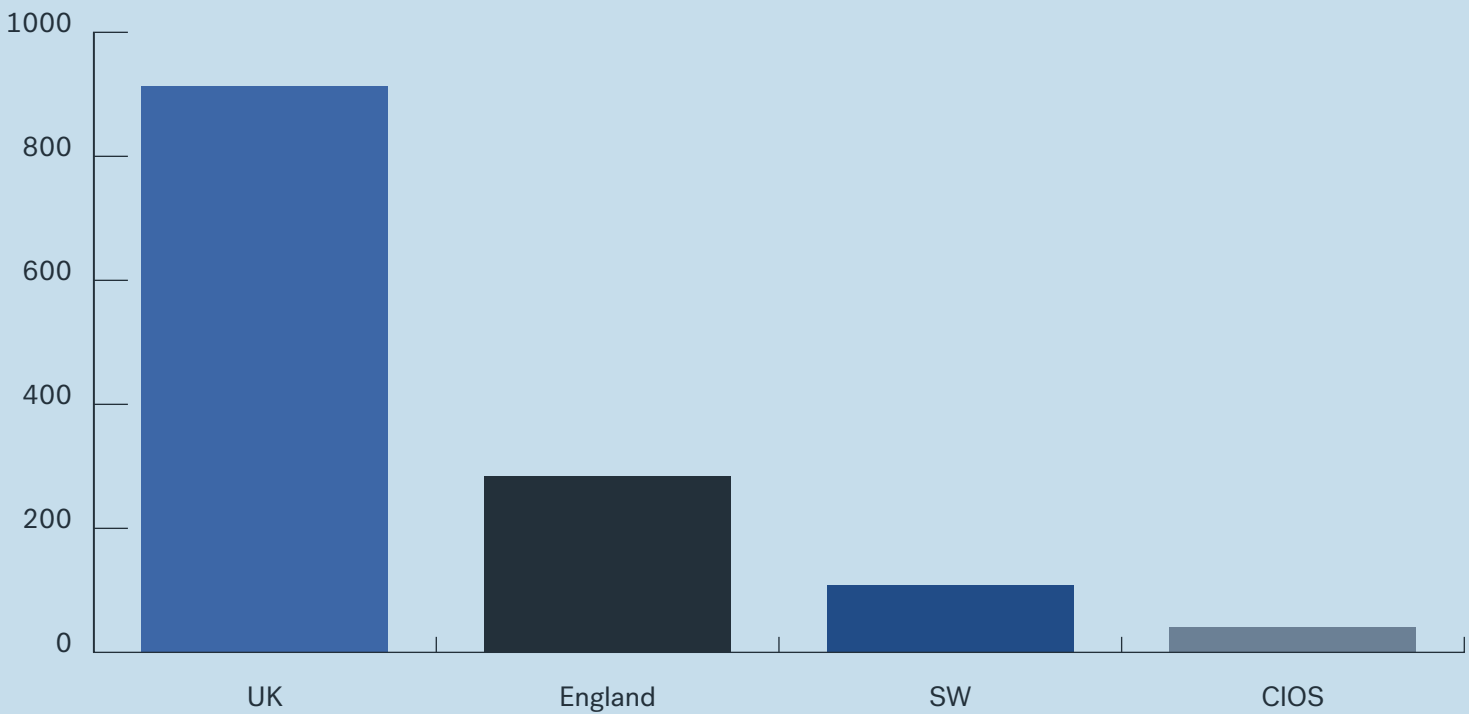
Source: MMO data.

<sup>13</sup> MMO fisheries statistics data

<sup>14</sup> Seafish data

<sup>15</sup> Seafish data

**Figure 10.2** Value of landings by vessels registered in UK, England, SW England and with administrative port CloS, 2021.



Source: analysis of MMO data.

Table 10.6 Annual value of landings into Newlyn by UK home nation and Foreign vessels (foreign vessels includes landings by vessels registered in Isle of Man and Guernsey) from 2015 to 2019.					
Vessel registration	2015	2016	2017	2018	2019
UK home nations	£22.1M	£27.7M	30	30.2	31.1
Foreign	£0.56M	£1.2M	£0.27M	£0.44M	£0.99M
Total	£22.7M	£28.9M	£30.2M	£30.6M	£32.1M
% foreign vessels	2.40%	4.20%	0.90%	1.40%	3.10%

Source: MMO annual data. Nb. UK registered vessels may be foreign-owned and operated.

perhaps due to the combined effects of covid and EU Exit.

10.13 Landings by vessel length

CloS had a higher proportion of landings made by smaller vessels in 2021 than was true for the UK fleet as a whole.

10.14 Landings by species and species group

The highest proportion of landings value into Cornwall in 2021 came from demersal fish, at 62%, with shellfish contributing around a third of the total value and pelagic fish contributing the smallest proportion at 7%.

The top 10 species landed in CloS in 2021 made up 78% of all landings value (see Table 4.10), and the top 20 species made up 94% of value landed in 2021. A further 72 other species

<sup>16</sup> MMO data set for Cornwall and Isles of Scilly

Table 10.7 Landings by length category, vessels with top port Cornwall.					
Total fishing income £m 2021 Vessels with top port Cornwall					
Vessel length category:	24m+	18m-24m	10m-18m	Under 10m	Total
Value of landings £m	10.3	10.5	13.3	9.1	43.2
Percent of total	24%	24%	31%	21%	100%
Percentages for UK fleet length groups 2021	56%	15%	15%	13%	

Source: CloS data from Seafish. UK fleet data, MMO data set for 2021

Table 10.8 Value of landings by species group into CloS and Newlyn.				
Species Group	Total Value (£) and percentage of all landings			
	Value of landings into CloS (£)	Percent of total	Value of landings into Newlyn (£)	Percent of total
Demersal	27,263,445	62%	22,354,882	71%
Pelagic	2,873,630	7%	6,672,704	21%
Shellfish	13,984,708	32%	2,286,732	7%
Total	44,121,783	100%	31,314,319	100%

Source: MMO data, all landings into CloS in 2021.





**Table 10.9** Value of landings of top 10 species by value landed in CloS.

Species name	Value (£)
Crabs (C.P.Mixed Sexes)	6,125,787
Sole	5,869,087
Monks or Anglers	5,633,182
Hake	4,664,241
Lobsters	4,523,875
Pilchards	1,924,697
Pollack	1,611,332
Turbot	1,596,649
Total of top 10 species	34,432,898
Percent of total value landed	78%

Source: analysis of MMO landings data for 2021

made up just under 6% of landings by value<sup>16</sup>.

10.15 Landings by port

CloS is rich in many smaller fishing ports, together with the main port of Newlyn. Newlyn dominates Cornish ports for value of landings, with landings of £31.3 million by all vessels in 2021. Cornwall ports with the next highest values of landing in 2021 were Padstow, with £2.4 million of landings and Mevagissey, with £1.7 million of landings in 2021<sup>17</sup>.

The top ten ports in CloS by value represented 96% of the total value landed in 2021.

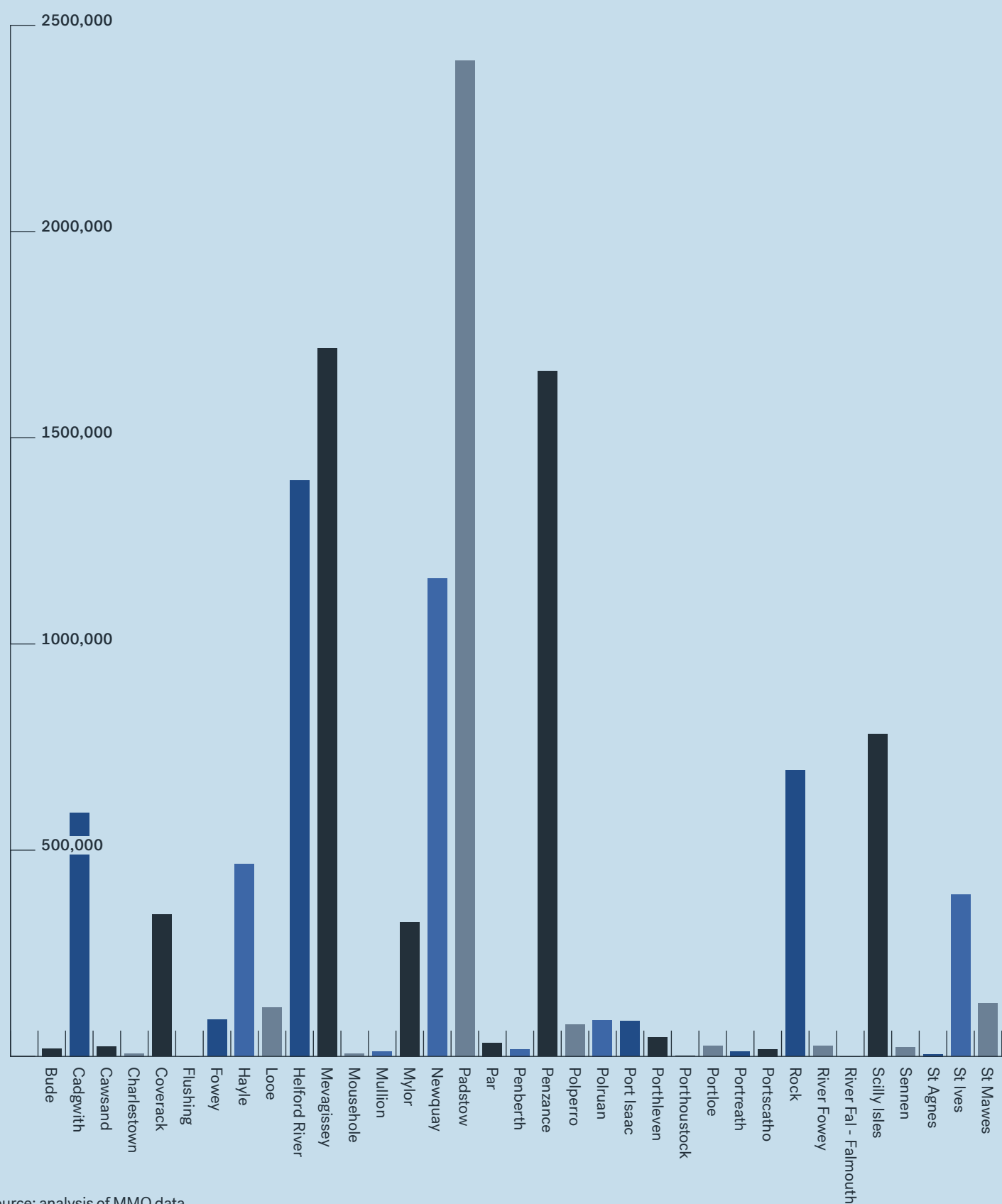
In 2021, Newlyn was ranked fifth port in the UK for value of landings, behind Peterhead (£174 million), Lerwick (£50.7 million), Brixham (£35.5 million) and Scrabster (£33.4 million). Plymouth had landings of £10.9 million and was ranked 14th in the UK in 2021<sup>18</sup>.

Table 10.10 Value of landings into top 10 CloS ports 2021.		
Port in CloS	2021 Value of landings £	% of all landings into CloS
Newlyn	31,314,319	71%
Padstow	2,413,838	5%
Mevagissey	1,717,592	4%
Penzance	1,661,957	4%
Looe	1,396,770	3%
Newquay	1,158,734	3%
Scilly Isles	781,960	2%
River Fal - Falmouth	693,416	2%
Cadgwith	591,210	1%
Hayle	466,039	1%
Total of top ten	42,195,836	96

Source: analysis of MMO landings data for 2021, vessels of all nationalities, all landings into CloS.

<sup>17 18</sup> MMO data for UK fleet and foreign landings into UK, 2021.

Figure 10.3 Value of landings (£) into CloS ports, not including Newlyn (Newlyn value £31.3 million) in 2021.



Source: analysis of MMO data.



### 10.16 Fish prices

Analysing characteristics of vessels or ports with different average prices can be interesting, but doesn't really tell us why the prices might be different. This relies on local knowledge and understanding of fishing practices. Nevertheless, we present analyses here of prices for important species at key ports, compared to UK average prices.

Average prices for lobsters were 8% higher for CloS than for the UK as a whole in 2021, perhaps a reflection of the easy access to a large demand for fresh shellfish in local restaurants in CloS. Hake and crabs also attracted higher than UK average prices, while sole and monkfish sold in CloS in 2021 had lower than UK average prices for the year.

### 10.17 Seasonality

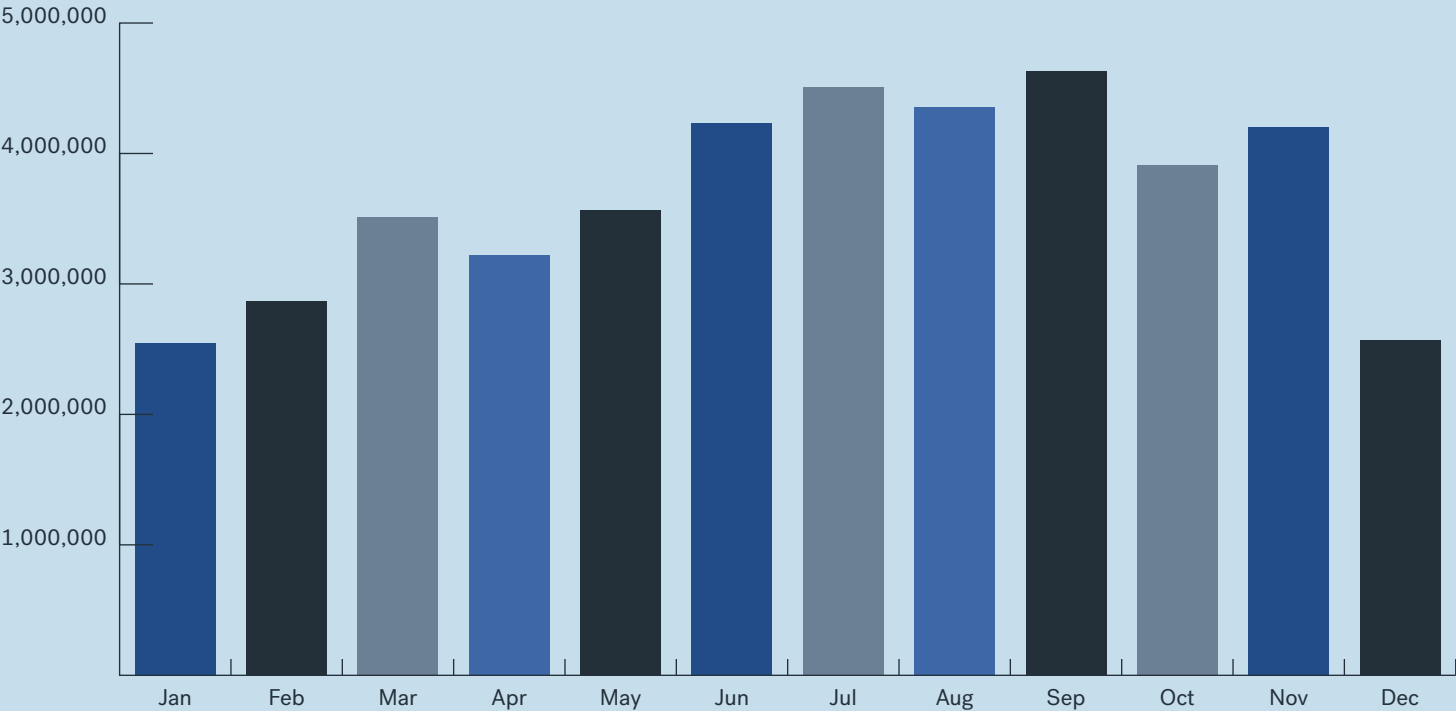
There is a peak in monthly landings value during the summer months. This is understandable given the higher proportion of small and very small boats in CloS which can be used more easily in good weather. There is also the influence of the tourist trade, which increases demand for locally caught seafood during the summer months. Vessel businesses that supply restaurants direct may operate only in the summer or operate more in the summer, and their direct sales to restaurants may only occur in the summer months. Lobsters, for instance, show a peak of landings value in July.

**Table 10.11** Landings by all vessels into CloS in 2021, filtered to show top 6 species by value for the whole of CloS, as landed into the top 10 ports. This includes £27.5 million landings of a total of £44.1 million.

Port	Crabs (C.P.Mixed Sexes)	Hake	Lobsters	Monks or Anglers	Pilchards	Sole	Total
Newlyn	3,090,536	4,629,846	1,631,856	4,656,267	1,768,708	4,790,360	20,567,572
Padstow	1,277,367	2,147	680,479	15,131		156,703	2,131,827
Penzance	16,018	19,904	7,887	359,065		628,512	1,031,385
Newquay	451,046	4,475	544,578	1,724		273	1,002,097
Scilly Isles	301,839		326,500				628,339
Mevagissey	67,429	3,230	38,432	130,019	142,368	168,095	549,572
Cadgwith	308,295		185,842	723	6		494,866
Looe	22,624	3,978	75,205	297,312		71,827	470,946
Hayle	70,657		288,097				358,754
Coverack	191,415		77,882	60		24	269,380
Totals for top 10 ports	5,797,225	4,663,579	3,856,759	5,460,301	1,911,082	5,815,794	27,504,739
Totals for all CloS	6,125,787	4,664,241	4,523,875	5,633,182	1,924,697	5,869,087	28,740,870

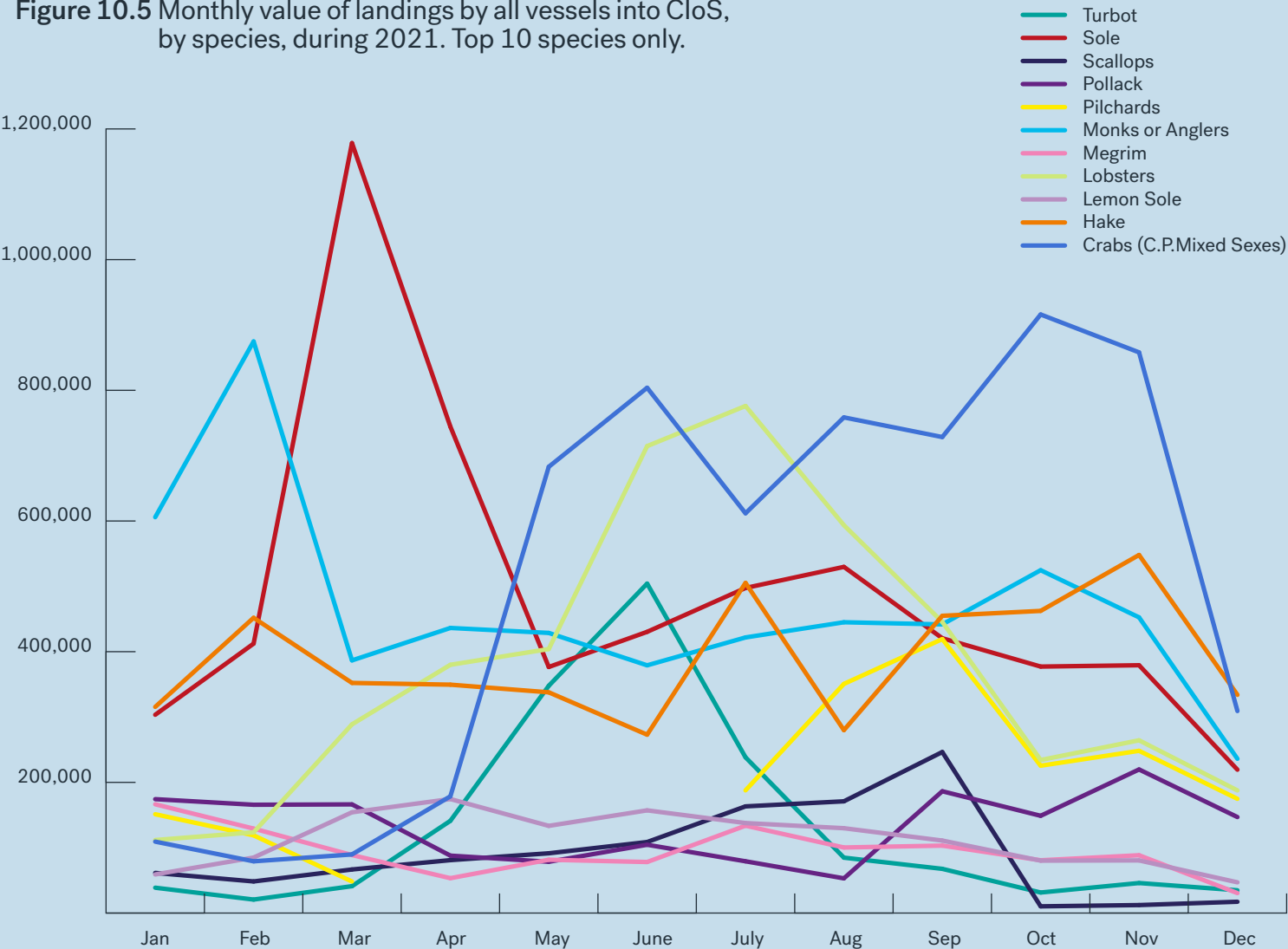
Source: analysis of MMO data.

Figure 10.4 Monthly value of landings into CloS, all vessels, 2021.



Source: MMO.

Figure 10.5 Monthly value of landings by all vessels into CloS, by species, during 2021. Top 10 species only.



Source: MMO.

# 11.0 PORT DEPENDENCY

This report focuses on demonstrating the extent to which the overall Cornwall & Isles of Scilly economy relies upon its fishing and seafood industries from an economic perspective, with comparisons to regional and national reference area economies (such as the South West and UK/GB). These findings show how the overall CloS economy, and all of its residents and communities, are dependent upon its 36 fishing ports.

In this section of the report we indicate the extent to which port dependency, and associated economic, social and community benefits, vary across CloS. We do this by showing how the local CloS seafood industry, which relies upon the local ports, pervades all parts of Cornwall & Isles of Scilly.

## 11.1 Measuring the fishing dependency of ports and areas of CloS

In this chapter we present a series of five maps covering a number of measures of the seafood industry in CloS.

All five maps show CloS's 2011 Mid-Layer Super Output Area boundaries (MSOA 2011<sup>19</sup>). Cornwall is divided into 73 MSOAs and Isles of Scilly is represented by one single MSOA.

**The five measures and associated maps are as follows:**

1. The distribution of the 635 resident workers across CloS MSOAs who stated in the last Census (2021) that they were currently working in 'fishing or aquaculture' as a percentage of all resident workers in the MSOA.
2. The distribution of the 960 BRES 2021 employment jobs across CloS MSOAs that are located in either marine fishing or aquaculture, fish processing & wholesale, and fishmongers as a percentage of all BRES employment jobs in the MSOA
3. The distribution of the 14,500 resident workers across CloS MSOAs who stated in the last Census (2021) that they were currently working in 'food & drink service' as a percentage of all resident workers in the MSOA

4. A composite average of three indicators representing the seafood production and wholesale and fishmongers portion of the overall CloS seafood industry:

- a. Census fishing and aquaculture resident workers in an area as a percentage of all resident workers in the area (i.e. measure 1 above)
- b. BRES 2021 workplace employment jobs in an area that are located in either marine fishing or aquaculture, fish processing & wholesale, fishmongers as a percentage of all workplace employment jobs in the area (i.e. measure 2 above)
- c. UK Business Count 2021 local business units in an area that are engaged in marine fishing or aquaculture, fish processing & wholesale, or fishmongers as a percentage of all local business units in the area

5. A composite average of:

- a. BRES 2021 employment jobs in an area that are located in the seafood industry (marine fishing or aquaculture, fish processing & wholesale, fishmongers, grocery store retail, foodservice) as a percentage of all employment in the area
- b. UK Business Count 2021 local business units in an area that are located in seafood industry (marine fishing or aquaculture, fish processing & wholesale, fishmongers, grocery store retail, foodservice) as a percentage of all businesses in the area
- c. Census food & drink service resident workers as a percentage of all resident workers in the MSOA (i.e. measure 4 above)

<sup>19</sup> MSOAs are a geographic area hierarchy designed to improve the reporting of small area statistics in England and Wales. Middle Layer Super Output Areas are built from groups of contiguous Lower Layer Super Output Areas, which themselves are constructed from Output Areas.







11.2 Key findings on CloS port dependency

The measures and associated maps tell a highly compelling visual ‘story’ with respect to port dependency in CloS. We sum these up as follows:

Map 1 – Resident workers in fishing and aquaculture

- The 655 CloS marine fishing and aquaculture resident workers are concentrated, as would be expected, in the large rural / coastal MSOAs of CloS surrounding its 36 ports (West Cornwall, Newlyn, Mousehole, The Lizard, Looe).
- These rural / coastal MSOAs have their population, and workers, spread across a relatively large geographic area (compared to CloS urban MSOAs) and are generally characterised by relatively low numbers of workplace employment opportunities.
- With low workplace employment opportunities, jobs in fishing in these areas make an essential contribution to local economic, social and community wellbeing.

Map 2 – Workplace jobs in fishing and aquaculture, processing and wholesale, fishmongers

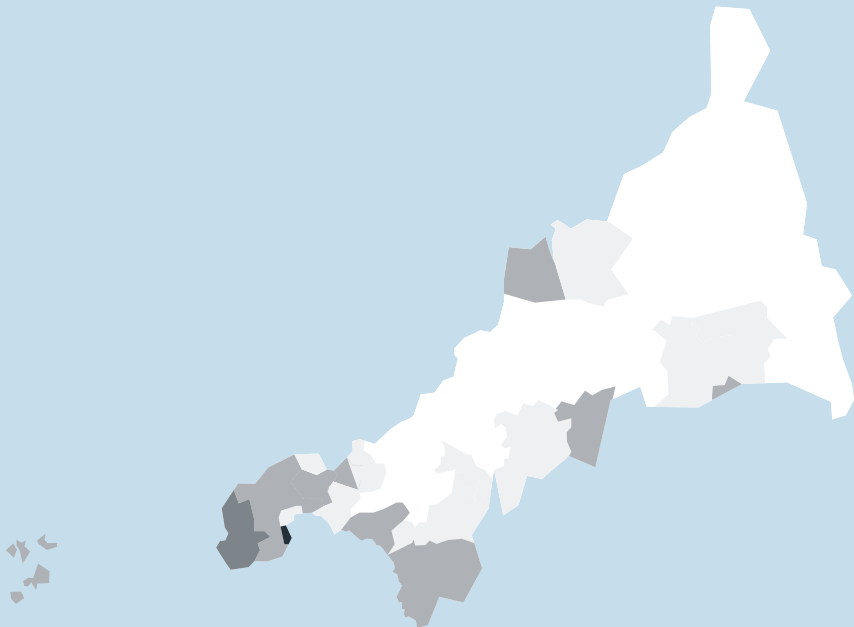
- Workplace economic activity (PAYE employment jobs) in the downstream seafood sectors of fish processing & wholesale and fishmongers can form a narrow definition of the seafood industry akin to the seafood production portion of the industry (comprising 960 jobs)
- Under this measure we see how CloS seafood jobs extend inland away from coastal areas (such as into Redruth, St Columb Major, St Dennis, Launceston, Camelford).

Map 3 – Resident workers in food service

- The 14,500 CloS food service resident workers are located in just about every part of Cornwall, both coastal and inland and urban
- Particular concentrations are along the north coast (from Newquay up to Bude through Padstow and Wadebridge), across West Cornwall, in Falmouth and in Truro, and in the South Cornwall Coast from St Austell through to Bude through Fowey
- All these areas are important tourism and visitor destinations, demonstrating the importance of foodservice (and seafood foodservice) in supporting the tourism industry in these areas across CloS, and the dependence of these tourism areas on CloS ports.
- The main part of CloS where there are lowest concentrations of foodservice workers are in parts of Cornwall furthest from the coast.

Figure 11.1 Areas of concentration where workers in fishing and aquaculture reside.

Map data refers to spread of 655 CloS resident workers in fishing or aquaculture across small areas (MSOAs) in CloS as a % of all resident workers in the area. Darkest area is Newlyn where 2.4% of all resident workers are working in fishing or aquaculture as their main job. White areas have a nil or negligible % of workers in fishing or aquaculture. Average CloS MSOA has 0.3% of all resident workers in fishing or aquaculture.



Map 1. Residential areas for CloS workers currently working in fishing and aquaculture as a percentage of all workers in the area. Source: Census 2021, ONS

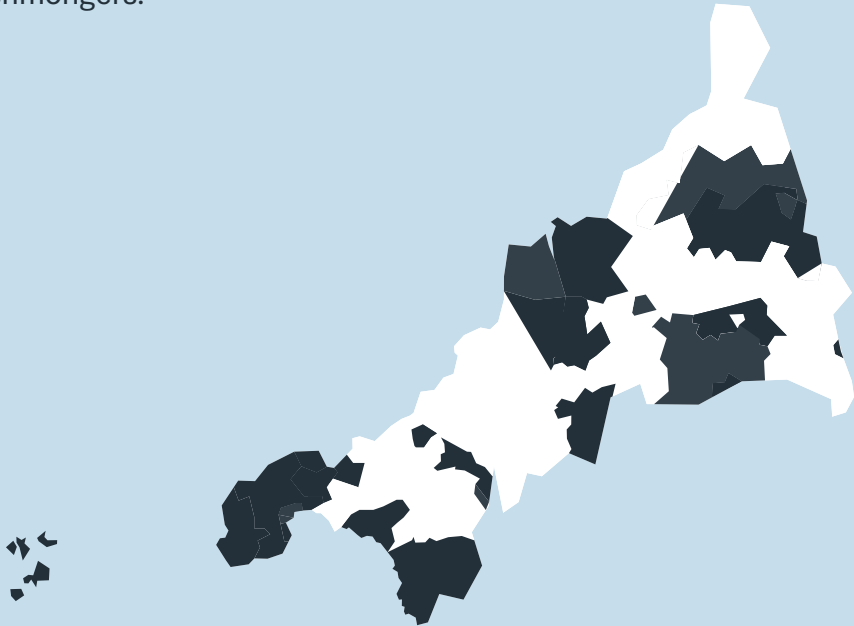
**Figure 11.2** Areas of concentration of jobs in fishing, aquaculture, processing, wholesale and fishmongers.

Map data refers to spread of 960 CloS resident workplace PAYE jobs in fishing or aquaculture or fish processing or fish wholesale or fish mongering across small areas (MSOAs) in CloS as a % of all jobs in the area.

Highest (Darkest) area is Newlyn with 10.0% of all jobs in these industries.

White areas have a nil or negligible % of workers in these industries.

Average CloS MSOA has 0.41% of all PAYE jobs in these industries.



**Map 2.** Areas for CloS workplace jobs in fishing, aquaculture, fish processing, fish wholesale, fish mongering as a percentage of all workplace workers in the area. Source: BRES 2021, ONS

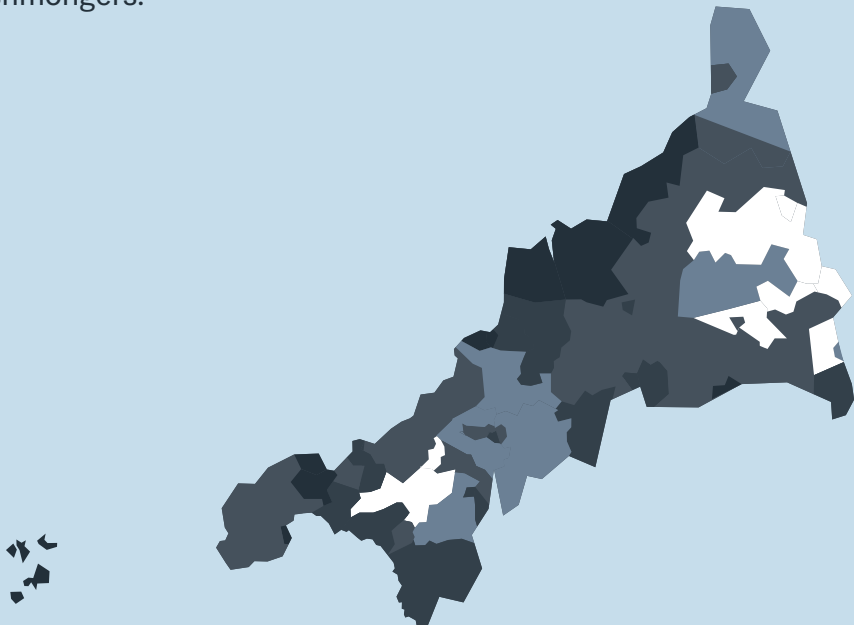
**Figure 11.3** Areas of concentration of jobs in fishing, aquaculture, processing, wholesale and fishmongers.

Map data refers to spread of 14,500 CloS resident workers in food or drink service across small areas (MSOAs) in CloS as a % of all resident workers in the area.

Highest (dark blue) area is St Ives where 11.9% of all resident workers are working in food or drink service as their main job.

White areas have lowest % of workers in food or drink service (lowest is the rural area around Saltash with 3.0%).

Average CloS MSOA has 5.7% of all resident workers in food or drink service.



**Map 3.** Residential areas for CloS workers working in foodservice as a percentage of all workers in the area. Source: Census 2021



#### Map 4 – Businesses, resident and workplace workers in fishing and aquaculture, workplace jobs in processing, wholesale, fishmongers

- Economic activity across CloS in the seafood production and wholesale sectors (including fishmongers) is very similar to the distribution of resident foodservice workers, as described under Map 3 above (i.e. West Cornwall, the North Cornwall and South Cornwall coastlines)
- However, there are some differences, mostly inland - including concentrations in such areas as Launceston, Bodmin, Redruth - which don't feature so strongly in terms of foodservice.

#### Map 5 – Businesses and workplace workers in seafood, resident workers in foodservice

- Considering the whole CloS seafood industry (including retail of seafood in grocery stores and supermarkets not included previously and combining seafood production and foodservice), shows that seafood-related work pervades just about every part of CloS
- The only exceptions, as with foodservice, are those large rural parts of Cornwall furthest away from the coast such as north east Cornwall and Roche / St Dennis / St Stephen in mid Cornwall, and also some parts of South West Cornwall in the large rural areas around Falmouth.

#### 11.3 Port dependency in CloS in summary

Where there are concentrations of businesses, jobs and workers located within any industry, and in any part of the UK, there are economic, social and community benefits associated with that industry in that area.

This is the case for the seafood industry in Cornwall and Isles of Scilly which, with few exceptions, pervades the whole of the Cornwall Peninsula and the Isles of Scilly.

Earlier in this report we illustrated how the CloS seafood industry overall is largely dependent upon its marine fishing sector, which, in turn, is wholly dependent upon the infrastructure of the ports, harbours and fishing villages and fishing communities.

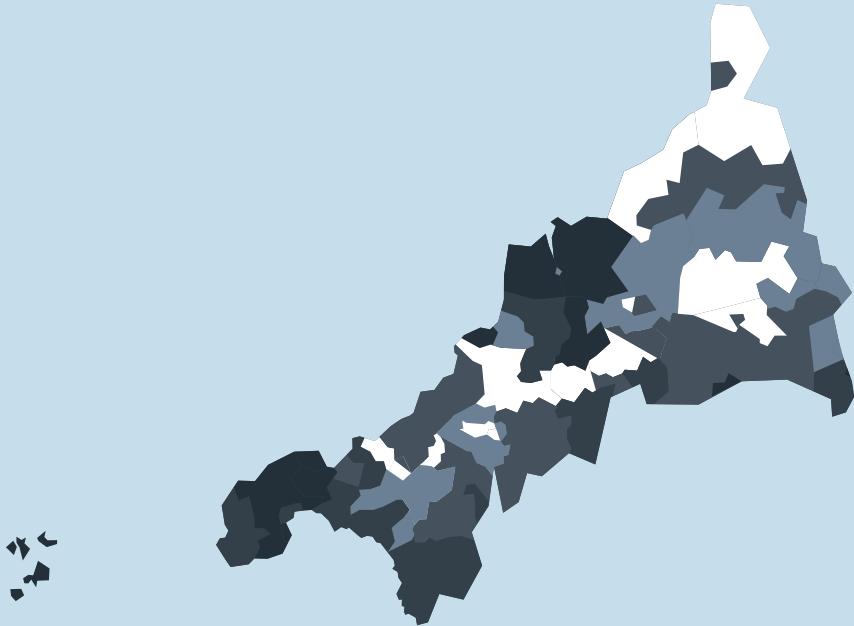
If we combine this finding with the findings shown here, concerning the distribution of the seafood industry and its sub-components across CloS, then just about every part of Cornwall and Isles of Scilly is highly dependent upon its ports, harbours and fishing villages and fishing communities being able to support fish catching and local landings.





**Figure 11.4** Areas of concentration of business, jobs and workers in the seafood sector.

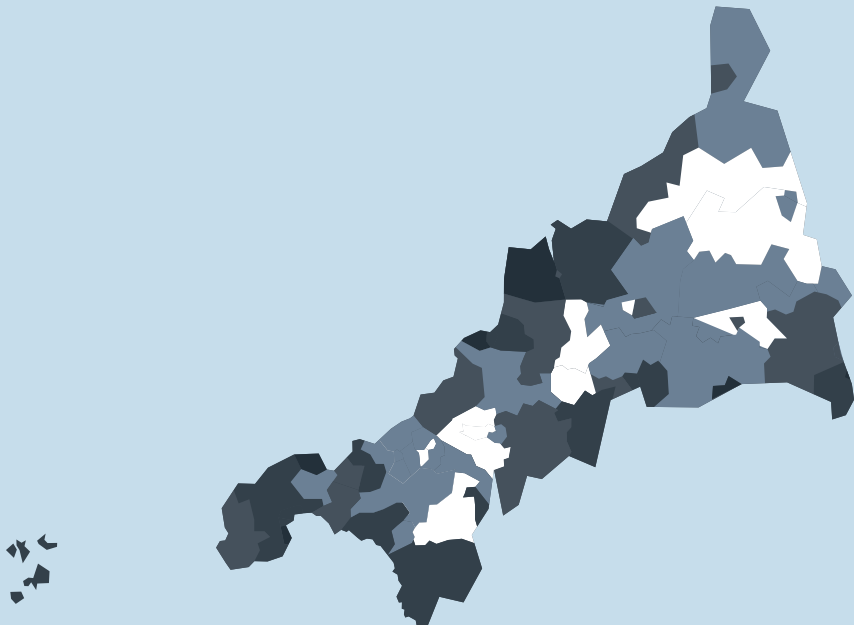
Map data refers to average of each area's percentages of businesses and PAYE jobs as % all businesses / jobs and fishing workers as % all workers. Highest concentration (dark red) area is Newlyn with an average of 8.7% across the 3 indicators. White areas have a nil or negligible average % across the 3 indicators. Average CloS MSOA has 0.7% average across the 3 indicators.



**Map 4.** CloS areas with higher (or lower) concentrations of businesses and jobs and workers in fishing, aquaculture, fish processing, fish wholesale, fishmongers. Source: BRES 2021 and Census 2021, ONS

**Figure 11.5** Areas of concentration of seafood industry businesses, jobs and workers.

Map data refers to average of each area's percentages of businesses and PAYE jobs as % all businesses / jobs and foodservice workers as % all resident workers. Highest (dark red) area is Newlyn with an average of 24.0% across the 3 indicators. White areas have lowest average % across the 3 indicators (lowest is Threemilestone/ Highertown/ Kenwyn area with 4.3% average). Average CloS MSOA has 11.5% average across the 3 indicators.



**Map 5.** CloS areas average percentages of seafood businesses and jobs and resident foodservice workers as percent of local denominators. Source: BRES 2021 and Census 2021, ONS

# 12.0 VIEWS ON VALUE OF SEAFOOD TO CORNWALL

At the end of interviews conducted with business people for this research, interviewees were asked if they wanted to share any thoughts about the value of seafood to Cornwall, in any respect. The researcher encouraged interviewees to answer in any way that they felt was important to them, or not to answer at all if they did not want to.

Analysis of answers revealed that overwhelmingly, people interviewed for this study felt that the value of seafood to Cornwall included the jobs and economic benefits of fishing, which spread throughout the supply chain, and in the creation and strength of communities that rely on fishing and upstream and downstream businesses. Overall well-being of being involved in fishing and seafood was strongly appreciated and mentioned as a key value of the fishing industry in Cornwall.

Tourism was mentioned frequently as supporting the value achievable via fishing and seafood and benefiting from the presence of the fishing industry and the ability to enjoy working fishing harbours and local seafood as part of the visitor experience.

## 12.1 Key themes from fishermen on value of seafood to Cornwall

From vessel owners, the key themes mentioned were around lifestyle, tradition, community, the large number of people involved using small boats, pleasure from fishing, related business sectors and indirect benefits, importance of fishing to tourism, restaurants, popularity of fresh local seafood for visitors, recognition of the importance of fishing from tourist industry businesses, and a future way of life. These themes on the value of seafood and fishing can be further grouped as follows:

- Employment benefits
- Community benefits
- Mutual reliance between fishing and tourism

Fishermen interviewed appreciated the history and tradition of their industry and perceived the importance of their work and its products to the whole community. In particular, some of the fishermen understood the mutual benefit and reliance between fishing and tourism, particularly experienced by them in terms of seeing tourists enjoying being around fishing harbours and watching the boats and activities around harbours. Others had direct experience of supplying seafood to restaurants that feature their provision of fresh, locally caught seafood and highlighted their relationship with individual fishermen and suppliers as a key part of their offering to visitors, helping visitors to feel connected to the origin of their food and the people involved in providing it. Interview answers revealed an understanding that restaurants were creating an attractive and enticing view of the fishing community for tourists.

Overall there was a mix of recognition of the importance of fishing to other businesses in the economy, to the economy overall, and to the well-being of those involved and in the wider community.

## 12.2 Key themes from processors on value of seafood to Cornwall

Among processors, there was equal recognition of economic value and of community value. A sense of community identity was mentioned frequently and appeared to be highly valued. One person commented that the richness of community life among the fishing sector was far more valuable than might be generated by other industry sectors that are more financially significant to the UK, but less culturally and socially important. This comment was reflected by another, acknowledging that in financial terms the industry might be small, but in community, family, tradition and cultural terms, the benefits were incalculable. There is a crucial importance to small coves, where maybe seven or eight families make a living from fishing, and create a viable community together.

Key themes from processors' answers on the value of seafood and fishing can be further grouped as follows:

- Economic benefits, spreading throughout the economy
- Community identity and cultural benefits
- Importance of infrastructure supporting vessel businesses
- Importance of the connection and reliance on tourism

Representative quotes from interviewees include the following:

***"The humble crab supports a lot of jobs and everyone in the chain."***

***"It's the fabric of the community."***

***"If you don't have fishing you don't have communities."***

***"Fishing is 100% intertwined with the rest of the economy here."***

***"Without fishermen, we haven't got a job"***

Among the answers from people in processing and wholesale there was further mention of the strength of mutual reliance between fishing and seafood and tourism. There was recognition of the popularity of Cornwall with artists and the link there to tourism and spending by visitors. There was an observation that both artists and visitors enjoyed the fishing industry as a subject of art, with the natural drama and romance attached to fishing featuring in people's perceptions.





# 13.0 STUDY APPROACH AND METHODS

## 13.1 Study methods

This study included collecting primary data and gathering secondary data, mainly from Office for National Statistics, Marine Management Organisation and Seafish.

The researchers aimed to gather data, primary and secondary, that could be analysed to characterise the fishing and aquaculture sectors in CloS and the upstream and downstream sectors supplying and relying on fishing, aquaculture and seafood imported to CloS. Researchers aimed to gather enough information to estimate a range of measures of value, settling on the GVA, employment, wages and number of businesses dependent on seafood in CloS.

A further research aim was to characterise the importance of seafood to CloS in a more rounded and comprehensive way than using only economic and financial measures, whilst remaining aware of the limited resources available for primary research in this project.

## 13.2 Reference year

Initial collection of secondary data led researchers to conclude that 2021 would be the most recent complete year for which reliable data would be available. The time lag in publishing annual data is caused in part by the time it takes businesses to produce and publish their annual accounts and in part by the time taken to process officially collected data, such as by the ONS, MMO and Seafish.

This study also included trends over recent years and responses by business operators to major changes, both in secondary data analysed and presented in this report, and in primary data collection interviews with business owners.

Data from the Seafish Fleet Enquiry Tool for the rest of the UK was classed as provisional for 2021 but for CloS vessels, we had final estimates from Seafish.

Data on businesses in the foodservice sector was collected in 2023 using Trip Advisor as a data source in a novel method created for this study, and therefore in part relates to 2023.

## 13.3 Definitions of the fishing industry

For estimates of the value of seafood to CloS from the marine fishing sector, official data sources use business classification codes and address of business to identify fishing businesses based in CloS.

For the deeper examination of business performance and characteristics, we relied on a combination of MMO and Seafish data and considered landings into CloS by different groups of vessels, and how to define a vessel as being “based” in CloS.

Some fishing vessels are owned and operated entirely in CloS, and are crewed by local people. But many Cornish vessels also landed outside of CloS during 2021 and vessels from elsewhere in the UK landed in CloS. Some vessels may be registered at an admin port in CloS but land much of their catch elsewhere.

Having reviewed possible definitions of the CloS fishing sector for this study, researchers opted for “vessels with top port of landing (by value) in CloS” in 2021. This definition was chosen by Seafish for their Fleet Enquiry Tool and meant that detailed financial and operational data would be readily available to this study.

When MMO landings data are presented, we have specified the group of vessels involved, e.g. all vessels landing into CloS or e.g. vessels registered in UK home nations (excluding Isle of Man and Channel Islands).

## 13.4 Definitions of seafood processing and wholesale

Companies that transform the nature of seafood are considered to be processors. This may include filleting, cutting, shucking, freezing, preserving, etc. These companies buy seafood in one condition and sell it with value added. They may sell to wholesalers, retail and foodservice outlets, in the UK and / or overseas.

Companies that purchase seafood or seafood products and simply repackage and sell in smaller quantities are considered to be wholesalers.

In CloS, we found companies that conducted both of these activities in the same premises and considered it not possible or useful to attempt to analyse these types of companies separately. We therefore grouped businesses together as a processing and wholesale sector.

Companies that process seafood only for their own sales direct to the public, e.g. fishmongers shops, are considered to be retailers.

## 13.5 Literature review

The starting point for the research for this project was a 20-year-old report titled Socio-Economic Baseline Study of the South West Fishing Industry, which was commissioned by PESCA and the South West Regional Development Agency and produced by EKOS Consulting and Nautilus Consultants. One of the researchers for this project was a member of the steering group for the project that delivered that report.

This report formed the starting point for CFPO expectations but unfortunately, although CFPO and the researchers had copies of the report, we cannot find where it is published and therefore cannot provide a link to the report.

The extensive publications by Seafish economics provided much of the data for the fishing and processing sectors used in this report, as did the data sets produced by the Marine Management Organisation.

ONS and Annual Business Survey data sets were used to estimate economic indicators based on official data. Port dependency analysis relied on census data, specifically declared job roles.



### 13.6 Data collection

The main purpose of primary data collection was to obtain information and quantitative data about the origin of purchases and the destination of sales by seafood businesses in CloS, together with information on workers, wages and profits. This was particularly important for the processing and wholesale sector for which there was only limited data available from Seafish. The data collected informed the economic model on outputs and multipliers

A purposive, stratified sampling method for industry interviews was applied for primary data collection in this study to ensure coverage of the various sub-sectors of industry and because interviews are a fairly big commitment by participants and entirely voluntary. A random sampling approach would not be valid or useful under these circumstances.

### 13.7 Establishing populations of businesses

Details of companies in the processing and wholesale sector were obtained via existing connections and knowledge, and internet searches for all related terms, such as fish processing, fish processor, seafood manufacturing, etc in CloS. Existing and local knowledge, combined with the number of such businesses in CloS identified in the last Seafish processing sector survey and in ONS data, were used to cross reference and ensure that researchers had a reliable list of qualifying businesses.

### 13.8 Interviews with business representatives

To provide credentials for the researcher conducting interviews, CFPO published an overview of the project on their website, so that the website link could be provided to businesses approached for interview.

A provisional list of data to be collected was shared with the project advisory group and comments and suggestions were reflected in the preparation of the final set of interview questions.

Interview questions were set out and formed the basis for conducting semi-structured interviews, with use of follow-up, probing questions as required to ascertain target information and any other general information about seafood industry practices in CloS.

Trial interviews with well-connected individuals in the catching sector and wider seafood sector were conducted by video to test the questions and also to gather general knowledge about business practices among the seafood sector in CloS, routes to market, and key people and businesses to include in lists for interview samples. Data from trial interviews were included in data sets analysed for this study.

Initial interviews were recorded but this practice was found to be unnecessary in collecting the required business data and was not continued after the first few interviews.

Interviewees were sent an overview of the survey explaining the purpose, how their data would be treated and who was involved. This form was reviewed at the start of each interview, to ensure that the interviewee's consent to participate was fully informed<sup>20</sup>.

As well as interviews with business owners and managers, triangulation interviews were conducted with people in key positions related to the seafood industry in CloS to validate, clarify or build on knowledge gained during business interviews. Purposive selection was used to invite candidates for triangulation interviews, to maximise the chances of obtaining the desired specific information.

### 13.9 Analysis of interview responses to question on importance of seafood

At the end of each interview, when the main questions had been completed, the researcher asked interviewees if they had views they would like to share on the importance of seafood to CloS, in any sense at all.

This question was asked to reflect the intention to assess value in broader terms than simply traditional economic measures. It was a good opportunity to capture an indication of the ways in which people involved in seafood value the industry and the value that they feel it contributes to CloS. Most interviewees seemed pleased to share their views and that their views would contribute to the report that would be prepared.

Responses to the question were written down verbatim and assigned a case, categorised by the type of business that the interviewee represented, e.g. processor, under 10m vessel owner.

Qualitative thematic analysis techniques were used to analyse the interview answers, highlighting key phrases and concepts. Key themes were then further grouped into categories.

<sup>20</sup> Signed consent forms were not collected because the identity of those interviewed was not going to be shared with anyone and there would be no-one to review such forms. If any interviewee decided after interview that they did not want their data to be included in analysis, researchers would have respected their wishes. However, no interviewee withdrew consent after contributing data.



# ANNEX 1.0 FURTHER DATA ON LANDINGS & VESSEL PERFORMANCE.

**Table 14.1** Landings by port in Cornwall by UK and foreign vessels, 2021.

Ports in CIOS	Value of Landings £	Percent of total	Proportion Demersal	Proportion Pelagic	Proportion Shellfish
Bude	19,178	0.04%	16%	0%	84%
Cadgwith	591,210	1.34%	7%	1%	92%
Cawsand	23,149	0.05%	4%	1%	95%
Charlestown	7,145	0.02%	0%	0%	100%
Coverack	343,847	0.78%	7%	4%	89%
Flushing	77	0.00%	100%	0%	0%
Fowey	88,825	0.20%	1%	0%	99%
Hayle	466,039	1.06%	5%	1%	94%
Helford River	118,830	0.27%	52%	13%	35%
Looe	1,396,770	3.17%	79%	1%	20%
Mevagissey	1,717,592	3.89%	63%	23%	14%
Mousehole	6,120	0.01%	0%	0%	100%
Mullion	11,879	0.03%	6%	0%	94%
Mylor	325,759	0.74%	18%	1%	80%
Newlyn	31,314,319	70.97%	71%	7%	21%
Newquay	1,158,734	2.63%	6%	0%	94%
Padstow	2,413,838	5.47%	19%	0%	81%
Par	33,241	0.08%	57%	8%	35%
Penberth	17,388	0.04%	0%	0%	100%
Penzance	1,661,957	3.77%	93%	0%	7%
Polperro	77,765	0.18%	67%	16%	17%
Polruan	88,083	0.20%	0%	13%	87%
Port Isaac	85,527	0.19%	1%	0%	99%
Porthleven	46,817	0.11%	22%	3%	75%
Porthoustock	1,338	0.00%	100%	0%	0%
Portloe	25,582	0.06%	1%	1%	98%
Portreath	12,575	0.03%	23%	0%	77%
Portscatho	17,936	0.04%	20%	14%	66%
River Fal - Falmouth	693,416	1.57%	34%	6%	60%
River Fowey	25,311	0.06%	10%	0%	89%
Rock	128	0.00%	100%	0%	0%
Scilly Isles	781,960	1.77%	1%	0%	99%
Sennen	22,263	0.05%	0%	0%	100%
St Agnes	5,303	0.01%	81%	0%	18%
St Ives	392,066	0.89%	5%	16%	80%
St Mawes	129,815	0.29%	61%	0%	39%
Total	44,121,783		62%	7%	32%

Source: Total landings value: MMO data for UK and foreign vessels landing into Cornwall. Proportions by species group: MMO provisional data.







**Table 14.2** Fleet financial and operation performance data for vessels under 10m, with top port of landing in CloS

**Top port CIOs vessels under 10m**

Variable		Trend 2012-2022	2012	2013	2014	2015
Segment totals	Active vessels (#)		471	446	428	446
	Power (kW)		20,671	20,355	19,614	20,200
	Registered Tonnage (GT)		1,348	1,340	1,271	1,270
	VCU (unit)		17,426	17,097	16,479	17,000
	Landings (tonnes)		5,333	4,248	4,455	3,960
	Fishing Income (£ million)		11.5	10.1	10.1	9.1
	Days at Sea (days)		19,990	18,634	19,214	17,900
	FTEs (#)		153	138	144	141
Vessel characteristics (Average per vessel)	Length (m)		6.6	6.7	6.6	6.6
	Power (kW)		44	46	46	45
	Registered Tonnage (GT)		3	3	3	3
	VCU (unit)		37	38	39	38
	Landings (tonnes)		11.3	9.5	10.4	8.9
	Fishing Income (£'000)		24.5	22.6	23.6	20.4
	Days at Sea (days)		42	42	45	40
	Vessel Age (year)		23	24	24	25
	Landings per day at sea (tonnes)		0.27	0.23	0.23	0.22
	Average price per tonne landed (£)		2,165	2,372	2,268	2,290
Performance indicators	Landings per kW day at sea (kg)		4.46	3.65	3.76	3.37
	Fishing Income per kW day at sea (£)		9.66	8.66	8.54	7.76
	Total operating cost per kW day at sea (£)		7.46	6.80	6.61	6.20
	Operating profit per kW day at sea (£)		2.81	2.39	2.55	1.75
	Fishing Income per FTE (£'000)		75.4	73.1	70.1	64.7
	Operating profit per FTE (£'000)		21.93	20.19	20.94	14.6
Income, costs and profit (Average per vessel)	Fishing Income (£'000)		24.5	22.6	23.6	20.4
	Non Fishing Income (£'000)		1.5	1.4	1.7	0.5
	<b>Total Income (£'000)</b>		<b>26.1</b>	<b>24.0</b>	<b>25.3</b>	<b>21.0</b>
	Fuel (£'000)		2.7	2.6	2.6	1.7
	Crew share (£'000)		6.6	5.5	6.4	6.0
	Other Fishing Costs (£'000)		4.4	4.5	3.8	3.6
	<b>Total Fishing Costs (£'000)</b>		<b>13.7</b>	<b>12.6</b>	<b>12.8</b>	<b>11.3</b>
	<b>Total Vessel Costs (£'000)</b>		<b>5.2</b>	<b>5.1</b>	<b>5.5</b>	<b>5.0</b>
	<b>Total Operating Costs (£'000)</b>		<b>18.9</b>	<b>17.7</b>	<b>18.3</b>	<b>16.3</b>
	<b>Gross Value Added (£'000)</b>		<b>13.8</b>	<b>11.7</b>	<b>13.5</b>	<b>10.6</b>
	<b>Operating Profit (£'000)</b>		<b>7.1</b>	<b>6.2</b>	<b>7.1</b>	<b>4.6</b>
	Depreciation (£'000)		1.9	1.8	1.6	1.4
	Interest (£'000)		0.2	0.3	0.3	0.2
	Other Finance Costs (£'000)		0.4	0.2	0.2	0.2
	<b>Net Profit (£'000)</b>		<b>4.6</b>	<b>4.0</b>	<b>5.0</b>	<b>2.8</b>

Source: Seafish response to enquiry.



in each year for period 2012 to 2022. 2022 data is provisional.

									Adjusted values (£)
5	2016	2017	2018	2019	2020	2021	2022	%Δ 2012-2022	%Δ 2018-2022
	436	444	415	408	398	376	381	-19%	-8%
210	20,190	20,068	19,259	17,723	17,965	15,642	16,591	-20%	-14%
73	1,286	1,274	1,222	1,153	1,166	1,032	1,083	-20%	-11%
13	16,970	16,991	16,174	15,192	15,330	13,669	14,262	-18%	-12%
63	4,823	4,381	3,854	3,199	2,579	2,493	2,235	-58%	-42%
	11.1	12.0	12.1	10.9	7.6	9.1	10.0	-14%	-17%
80	20,380	19,908	18,770	17,727	13,503	15,443	14,781	-26%	-21%
	155	151	136	106	76	93	88	-42%	-35%
	6.7	6.6	6.7	6.6	6.7	6.6	6.6	-1%	-1%
	46	45	46	43	45	42	44	-1%	-6%
	3	3	3	3	3	3	3	-1%	-3%
	39	38	39	37	39	36	37	1%	-4%
	11.1	9.9	9.3	7.8	6.5	6.6	5.9	-48%	-37%
4	25.4	26.9	29.1	26.6	19.1	24.3	26.2	7%	-10%
	47	45	45	43	34	41	39	-9%	-14%
	26	26	26	28	27	28	29	27%	9%
2	0.24	0.22	0.21	0.18	0.19	0.16	0.15	-43%	-26%
99	2,299	2,730	3,134	3,394	2,952	3,662	4,469	106%	43%
7	3.68	3.61	3.13	3.03	3.31	3.19	2.74	-39%	-12%
6	8.47	9.84	9.80	10.29	9.78	11.69	12.26	27%	25%
0	6.15	6.96	7.33	8.11	8.08	8.98	9.52	28%	30%
5	2.70	3.29	2.70	2.88	3.91	3.62	3.37	20%	25%
7	71.5	79.1	89.0	102.2	99.6	97.7	112.8	50%	27%
63	22.83	26.43	24.48	28.58	39.81	30.29	30.98	41%	27%
4	25.4	26.9	29.1	26.6	19.1	24.3	26.2	7%	-10%
	1.2	1.1	0.7	1.8	4.3	1.9	1.3	-13%	99%
0	<b>26.6</b>	<b>28.1</b>	<b>29.8</b>	<b>28.4</b>	<b>23.4</b>	<b>26.2</b>	<b>27.6</b>	<b>6%</b>	<b>-7%</b>
	1.9	2.0	2.6	2.2	1.1	1.7	2.8	3%	7%
	7.4	7.3	9.0	8.5	6.4	7.9	7.8	17%	-13%
	4.0	4.3	4.1	4.0	3.0	3.5	3.7	-16%	-10%
3	13.3	13.7	15.7	14.7	10.5	13.0	14.2	4%	-9%
	5.1	5.3	6.1	6.3	5.3	5.6	6.1	17%	0%
8	18.5	19.1	21.8	21.0	15.8	18.7	20.4	8%	-6%
6	<b>15.5</b>	<b>16.3</b>	<b>17.0</b>	<b>15.9</b>	<b>14.1</b>	<b>15.4</b>	<b>15.0</b>	<b>9%</b>	<b>-12%</b>
	<b>8.1</b>	<b>9.0</b>	<b>8.0</b>	<b>7.4</b>	<b>7.6</b>	<b>7.5</b>	<b>7.2</b>	<b>1%</b>	<b>-10%</b>
	1.7	1.8	1.9	2.4	2.3	2.4			
	0.2	0.2	0.2	0.2	0.1	0.2			
	0.1	0.1	0.2	0.2	0.1	0.1			
	<b>6.1</b>	<b>6.9</b>	<b>5.6</b>	<b>4.7</b>	<b>5.1</b>	<b>4.8</b>	<b>7.2</b>	<b>55%</b>	<b>28%</b>

**Table 14.3** Fleet financial and operation performance data for vessels 10m – 18m, with top port of landing in CloS

**Top port CIOS vessels 10-18m**

Variable		Trend 2012-2022	2012	2013	2014	2015
Segment totals	Active vessels (#)		54	57	58	55
	Power (kW)		9,945	10,058	10,474	9,870
	Registered Tonnage (GT)		1,700	1,719	1,862	1,520
	VCU (unit)		7,759	7,922	8,376	7,670
	Landings (tonnes)		8,235	8,176	8,680	7,780
	Fishing Income (£ million)		14.3	14.8	15.1	13.1
	Days at Sea (days)		7,734	7,644	8,066	7,480
	FTEs (#)		169	122	189	166
Vessel characteristics (Average per vessel)	Length (m)		12.5	12.4	12.7	12.4
	Power (kW)		184	176	181	180
	Registered Tonnage (GT)		31	30	32	28
	VCU (unit)		144	139	144	140
	Landings (tonnes)		152.5	143.4	149.7	141
	Fishing Income (£'000)		264.6	259.5	260.3	238
	Days at Sea (days)		143	134	139	136
	Vessel Age (year)		25	26	24	25
	Landings per day at sea (tonnes)		1.06	1.07	1.08	1.04
	Average price per tonne landed (£)		1,735	1,809	1,739	1,680
Performance indicators	Landings per kW day at sea (kg)		5.59	5.90	5.87	5.65
	Fishing Income per kW day at sea (£)		9.69	10.67	10.21	9.52
	Total operating cost per kW day at sea (£)		7.95	9.22	8.17	7.76
	Operating profit per kW day at sea (£)		2.11	1.62	2.34	2.48
	Fishing Income per FTE (£'000)		84.7	121.7	80.0	78.8
	Operating profit per FTE (£'000)		18.46	18.54	18.34	20.5
Income, costs and profit (Average per vessel)	Fishing Income (£'000)		264.6	259.5	260.3	238
	Non Fishing Income (£'000)		10.1	4.3	7.5	18.0
	<b>Total Income (£'000)</b>		<b>274.6</b>	<b>263.7</b>	<b>267.8</b>	<b>256</b>
	Fuel (£'000)		41.2	36.7	36.3	24.7
	Crew share (£'000)		71.8	76.5	68.5	64.3
	Other Fishing Costs (£'000)		37.5	46.5	44.5	48.4
	<b>Total Fishing Costs (£'000)</b>		<b>150.5</b>	<b>159.6</b>	<b>149.2</b>	<b>137</b>
	<b>Total Vessel Costs (£'000)</b>		<b>66.5</b>	<b>64.6</b>	<b>58.9</b>	<b>56.9</b>
	<b>Total Operating Costs (£'000)</b>		<b>217.0</b>	<b>224.2</b>	<b>208.1</b>	<b>194</b>
	<b>Gross Value Added (£'000)</b>		<b>129.4</b>	<b>116.0</b>	<b>128.1</b>	<b>126</b>
	<b>Operating Profit (£'000)</b>		<b>57.7</b>	<b>39.5</b>	<b>59.6</b>	<b>62.1</b>
	Depreciation (£'000)		10.9	16.5	12.8	12.3
	Interest (£'000)		1.7	1.4	2.3	1.4
	Other Finance Costs (£'000)		0.5	0.6	1.0	0.8
	<b>Net Profit (£'000)</b>		<b>44.5</b>	<b>21.0</b>	<b>43.5</b>	<b>47.5</b>

Source: Seafish response to enquiry.

in each year for period 2012 to 2022. 2022 data is provisional.

									Adjusted values (£)
	2016	2017	2018	2019	2020	2021	2022	%Δ 2012-2022	%Δ 2018-2022
5	56	56	56	56	50	48	45	-17%	-20%
73	10,265	10,164	10,294	10,367	9,347	8,879	8,423	-15%	-18%
29	1,609	1,641	1,605	1,661	1,512	1,497	1,588	-7%	-1%
8	7,948	8,047	8,095	8,179	7,427	7,140	6,864	-12%	-15%
32	10,275	9,844	10,772	10,113	11,401	9,528	10,871	32%	1%
L	15.2	16.5	15.7	15.7	11.3	13.8	13.3	-7%	-15%
36	8,000	7,419	7,580	7,853	5,923	6,106	5,466	-29%	-28%
	204	143	177	156	149	135	124	-27%	-30%
4	12.4	12.6	12.6	12.7	12.7	12.8	13.0	4%	3%
	183	182	184	185	187	185	187	2%	2%
	29	29	29	30	30	31	35	12%	23%
	142	144	145	146	149	149	153	6%	6%
5	183.5	175.8	192.4	180.6	228.0	198.5	241.6	58%	26%
4	271.7	294.9	281.0	280.1	226.7	287.9	295.6	12%	5%
	143	132	135	140	118	127	121	-15%	-10%
	26	26	26	27	26	26	26	4%	-2%
4	1.28	1.33	1.42	1.29	1.92	1.56	1.99	87%	40%
35	1,481	1,677	1,461	1,551	994	1,450	1,223	-29%	-16%
5	6.89	7.10	7.48	6.67	9.88	8.23	10.50	88%	40%
2	10.20	11.92	10.92	10.34	9.82	11.94	12.85	33%	18%
6	8.17	9.59	9.03	8.56	8.61	9.81	11.04	39%	22%
3	2.49	2.90	2.21	2.06	1.97	2.32	2.01	-5%	-9%
3	74.7	115.7	89.1	100.6	76.1	102.0	107.6	27%	21%
51	18.26	28.14	18.05	20.04	15.28	19.82	16.81	-9%	-7%
4	271.7	294.9	281.0	280.1	226.7	287.9	295.6	12%	5%
0	12.4	14.2	8.2	7.5	17.6	4.5	4.4	-56%	-46%
4	<b>284.1</b>	<b>309.1</b>	<b>289.2</b>	<b>287.7</b>	<b>244.3</b>	<b>292.3</b>	<b>300.0</b>	<b>9%</b>	<b>4%</b>
7	24.6	29.5	36.9	36.5	21.9	30.4	51.0	24%	38%
3	76.1	83.0	88.0	87.0	81.9	99.6	93.6	30%	6%
4	61.2	47.2	43.7	41.0	38.3	43.3	44.2	18%	1%
5	161.9	159.7	168.6	164.5	142.2	173.3	188.8	25%	12%
9	55.8	77.7	63.7	67.4	56.6	63.1	65.1	-2%	2%
4	217.7	237.4	232.3	231.9	198.7	236.4	253.9	17%	9%
4	<b>142.5</b>	<b>154.7</b>	<b>144.9</b>	<b>142.8</b>	<b>127.5</b>	<b>155.5</b>	<b>139.8</b>	<b>8%</b>	<b>-4%</b>
1	<b>66.4</b>	<b>71.7</b>	<b>56.9</b>	<b>55.8</b>	<b>45.5</b>	<b>55.9</b>	<b>46.2</b>	<b>-20%</b>	<b>-19%</b>
3	13.5	15.1	16.0	15.9	17.7	16.3			
	1.7	2.4	2.3	2.4	1.9	1.2			
	0.7	1.5	1.0	1.0	0.8	2.0			
5	<b>50.6</b>	<b>52.8</b>	<b>37.6</b>	<b>36.5</b>	<b>25.1</b>	<b>36.4</b>	<b>46.2</b>	<b>4%</b>	<b>23%</b>



**Table 14.4** Fleet financial and operation performance data for vessels 18m – 24m, with top port of landing in CloS

**Top port CIOs vessels 18-24m**

Variable		Trend 2012-2022	2012	2013	2014	2015
Segment totals	Active vessels (#)		9	8	10	12
	Power (kW)		2,772	2,485	3,320	4,260
	Registered Tonnage (GT)		1,253	1,140	1,417	1,800
	VCU (unit)		2,518	2,275	2,846	3,640
	Landings (tonnes)		2,774	2,269	2,525	3,340
	Fishing Income (£ million)		8.1	6.8	6.3	9.5
	Days at Sea (days)		2,137	1,861	1,879	2,650
	FTEs (#)		85	59	78	106
Vessel characteristics (Average per vessel)	Length (m)		21.4	21.8	20.5	21.5
	Power (kW)		308	311	332	356
	Registered Tonnage (GT)		139	143	142	151
	VCU (unit)		280	284	285	304
	Landings (tonnes)		308.2	283.6	252.5	278
	Fishing Income (£'000)		895.0	850.5	629.1	793
	Days at Sea (days)		237	233	188	221
	Vessel Age (year)		25	27	27	26
	Landings per day at sea (tonnes)		1.30	1.22	1.34	1.26
	Average price per tonne landed (£)		2,904	2,998	2,491	2,840
Performance indicators	Landings per kW day at sea (kg)		4.22	3.88	4.10	3.61
	Fishing Income per kW day at sea (£)		12.26	11.64	10.21	10.2
	Total operating cost per kW day at sea (£)		10.07	10.01	8.29	8.36
	Operating profit per kW day at sea (£)		2.57	1.70	2.22	2.58
	Fishing Income per FTE (£'000)		94.8	116.0	81.1	90.1
	Operating profit per FTE (£'000)		19.89	16.95	17.60	22.5
Income, costs and profit (Average per vessel)w	Fishing Income (£'000)		895.0	850.5	629.1	793
	Non Fishing Income (£'000)		27.8	5.2	17.7	50.4
	<b>Total Income (£'000)</b>		<b>922.9</b>	<b>855.7</b>	<b>646.8</b>	<b>843</b>
	Fuel (£'000)		143.2	128.4	85.9	82.5
	Crew share (£'000)		228.9	230.4	154.0	219
	Other Fishing Costs (£'000)		147.1	193.9	147.3	161
	<b>Total Fishing Costs (£'000)</b>		<b>519.2</b>	<b>552.6</b>	<b>387.1</b>	<b>464</b>
	<b>Total Vessel Costs (£'000)</b>		<b>215.8</b>	<b>179.0</b>	<b>123.3</b>	<b>180</b>
	<b>Total Operating Costs (£'000)</b>		<b>735.1</b>	<b>731.5</b>	<b>510.4</b>	<b>644</b>
	<b>Gross Value Added (£'000)</b>		<b>416.7</b>	<b>354.6</b>	<b>290.4</b>	<b>418</b>
	<b>Operating Profit (£'000)</b>		<b>187.8</b>	<b>124.2</b>	<b>136.5</b>	<b>198</b>
	Depreciation (£'000)		26.2	36.7	23.0	38.1
	Interest (£'000)		7.5	6.3	6.2	5.0
	Other Finance Costs (£'000)		2.4	1.6	2.4	1.2
	<b>Net Profit (£'000)</b>		<b>151.8</b>	<b>79.7</b>	<b>105.0</b>	<b>154</b>



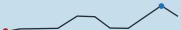
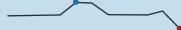

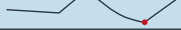
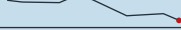




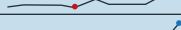

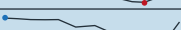



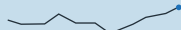


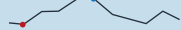















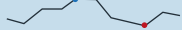


Source: Seafish response to enquiry.

in each year for period 2012 to 2022. 2022 data is provisional.

									Adjusted values (£)
	2016	2017	2018	2019	2020	2021	2022	%Δ 2012-2022	%Δ 2018-2022
5	13	13	14	13	13	14	16	78%	14%
66	4,220	4,433	4,674	4,226	3,961	4,321	5,037	82%	8%
9	1,817	1,915	2,044	1,832	1,806	1,979	2,346	87%	15%
44	3,687	3,803	4,034	3,671	3,576	3,895	4,512	79%	12%
43	3,642	3,518	3,845	3,450	2,613	2,774	3,502	26%	-9%
	11.4	11.7	12.5	11.6	8.4	10.5	14.4	79%	16%
57	2,989	2,909	3,151	2,702	2,478	2,832	3,280	53%	4%
	124	91	128	95	80	95	112	32%	-12%
5	20.8	20.8	20.7	20.4	20.9	20.8	20.7	-3%	0%
	325	341	334	325	305	309	315	2%	-6%
	140	147	146	141	139	141	147	5%	0%
	284	293	288	282	275	278	282	1%	-2%
6	280.2	270.6	274.6	265.4	201.0	198.1	218.9	-29%	-20%
2	879.5	903.2	889.4	890.1	646.7	749.3	900.2	1%	1%
	230	224	225	208	191	202	205	-14%	-9%
	25	24	25	27	29	28	26	8%	8%
6	1.22	1.21	1.22	1.28	1.05	0.98	1.07	-18%	-13%
47	3,139	3,338	3,239	3,354	3,218	3,782	4,113	42%	27%
L	3.68	3.48	3.63	3.85	3.57	3.26	3.40	-19%	-6%
28	11.56	11.61	11.75	12.92	11.50	12.33	13.99	14%	19%
6	8.88	9.62	9.96	10.75	10.09	10.63	12.42	23%	25%
3	2.72	2.08	1.95	2.28	1.60	1.78	1.69	-34%	-13%
L	92.4	129.0	97.4	121.7	104.7	110.6	128.4	36%	32%
57	21.75	23.16	16.16	21.48	14.56	16.00	15.54	-22%	-4%
2	879.5	903.2	889.4	890.1	646.7	749.3	900.2	1%	1%
4	3.0	7.8	11.9	7.3	10.5	5.1	7.7	-72%	-35%
6	<b>882.5</b>	<b>911.0</b>	<b>901.3</b>	<b>897.4</b>	<b>657.2</b>	<b>754.4</b>	<b>907.9</b>	<b>-2%</b>	<b>1%</b>
5	72.2	101.1	110.3	84.0	64.0	81.3	135.0	-6%	22%
9	257.4	224.7	260.9	282.5	212.6	246.5	280.6	23%	8%
7	162.8	184.0	179.6	161.6	138.2	143.2	168.7	15%	-6%
1	492.5	509.8	550.8	528.2	414.9	471.0	584.3	13%	6%
7	182.8	239.0	202.9	212.2	152.4	175.0	214.7	-1%	6%
8	675.4	748.8	753.7	740.3	567.3	646.1	799.0	9%	6%
7	<b>464.5</b>	<b>387.0</b>	<b>408.5</b>	<b>439.6</b>	<b>302.6</b>	<b>354.9</b>	<b>389.4</b>	<b>-7%</b>	<b>-5%</b>
8	<b>207.1</b>	<b>162.2</b>	<b>147.6</b>	<b>157.1</b>	<b>89.9</b>	<b>108.4</b>	<b>108.9</b>	<b>-42%</b>	<b>-26%</b>
L	48.2	30.5	39.9	35.1	29.4	24.9			
	2.6	3.5	3.8	2.1	0.1	0.0			
	1.0	0.8	0.5	0.4	0.1	0.1			
5	<b>155.4</b>	<b>127.4</b>	<b>103.3</b>	<b>119.5</b>	<b>60.4</b>	<b>83.4</b>	<b>108.9</b>	<b>-28%</b>	<b>5%</b>

**Table 14.5** Fleet financial and operation performance data for vessels 24m +, with top port of landing in CloS in ea

**Top port CLOS vessels 24m+**

Variable		Trend	2012	2013	2014	2015
Segment totals	Active vessels (#)		13	13	13	13
	Power (kW)		7,513	7,688	7,688	7,63
	Registered Tonnage (GT)		1,902	2,006	2,006	2,00
	VCU (unit)		5,863	5,994	5,994	5,99
	Landings (tonnes)		3,231	3,143	3,116	3,31
	Fishing Income (£ million)		10.4	10.1	9.9	9.9
	Days at Sea (days)		2,652	2,612	2,644	2,61
	FTEs (#)		107	92	74	76
Vessel characteristics (Average per vessel)	Length (m)		28.4	28.5	28.5	28.5
	Power (kW)		578	591	591	587
	Registered Tonnage (GT)		146	154	154	154
	VCU (unit)		451	461	461	461
	Landings (tonnes)		248.5	241.8	239.7	254
	Fishing Income (£'000)		803.5	778.0	765.1	765
	Days at Sea (days)		204	201	203	201
	Vessel Age (year)		43	42	43	44
	Landings per day at sea (tonnes)		1.22	1.20	1.18	1.27
	Average price per tonne landed (£)		3,233	3,218	3,192	3,00
Performance indicators	Landings per kW day at sea (kg)		2.07	1.94	1.95	2.15
	Fishing Income per kW day at sea (£)		6.68	6.23	6.21	6.46
	Total operating cost per kW day at sea (£)		6.66	6.18	6.13	7.52
	Operating profit per kW day at sea (£)		0.24	0.07	0.57	0.60
	Fishing Income per FTE (£'000)		98.0	110.1	133.6	130
	Operating profit per FTE (£'000)		3.59	1.32	12.32	12.0
Income, costs and profit (Average per vessel)	Fishing Income (£'000)		803.5	778.0	765.1	765
	Non Fishing Income (£'000)		27.3	2.7	61.5	196
	<b>Total Income (£'000)</b>		<b>830.8</b>	<b>780.7</b>	<b>826.6</b>	<b>961</b>
	Fuel (£'000)		353.7	338.4	307.0	210
	Crew share (£'000)		201.9	191.6	191.4	240
	Other Fishing Costs (£'000)		59.3	82.9	87.2	63.7
	<b>Total Fishing Costs (£'000)</b>		<b>614.9</b>	<b>612.8</b>	<b>585.6</b>	<b>515</b>
	<b>Total Vessel Costs (£'000)</b>		<b>186.5</b>	<b>158.6</b>	<b>170.4</b>	<b>375</b>
	<b>Total Operating Costs (£'000)</b>		<b>801.4</b>	<b>771.4</b>	<b>756.0</b>	<b>890</b>
	<b>Gross Value Added (£'000)</b>		<b>231.3</b>	<b>200.9</b>	<b>262.0</b>	<b>311</b>
	<b>Operating Profit (£'000)</b>		<b>29.4</b>	<b>9.3</b>	<b>70.6</b>	<b>70.5</b>
	Depreciation (£'000)		6.9	6.7	5.3	9.7
	Interest (£'000)		3.0	2.9	2.5	3.3
	Other Finance Costs (£'000)		0.9	1.7	0.4	2.1
	<b>Net Profit (£'000)</b>		<b>18.6</b>	<b>-1.9</b>	<b>62.3</b>	<b>55.5</b>

Source: Seafish response to enquiry.



Each year for period 2012 to 2022. 2022 data is provisional.

									Adjusted values (£)
	2016	2017	2018	2019	2020	2021	2022	%Δ 2012-2022	%Δ 2018-2022
	15	14	13	13	13	13	10	-23%	-23%
34	8,497	8,496	7,634	7,634	7,482	7,589	6,190	-18%	-19%
06	2,396	2,322	2,013	2,013	2,298	2,732	2,324	22%	15%
94	6,745	6,585	5,994	5,994	5,959	6,235	5,139	-12%	-14%
2	3,298	3,198	2,514	2,448	2,712	2,808	2,828	-12%	12%
	12.0	12.3	10.3	9.1	8.4	10.3	12.1	16%	18%
1	2,872	2,699	2,387	2,171	2,246	2,221	1,984	-25%	-17%
	93	80	48	59	69	98	90	-16%	86%
5	28.2	28.3	28.5	28.5	28.3	29.6	31.1	10%	9%
	566	607	587	587	576	584	619	7%	5%
	160	166	155	155	177	210	232	59%	50%
	450	470	461	461	458	480	514	14%	11%
8	219.9	228.4	193.4	188.3	208.7	216.0	282.8	14%	46%
1	799.8	875.1	791.3	702.2	642.9	793.0	1,209.5	51%	53%
	191	193	184	167	173	171	198	-3%	8%
	44	44	47	48	42	39	39	-11%	-18%
7	1.15	1.18	1.05	1.13	1.21	1.26	1.43	17%	35%
03	3,637	3,831	4,092	3,729	3,081	3,672	4,277	32%	5%
5	1.97	1.98	1.75	1.89	2.09	2.16	2.32	12%	33%
6	7.18	7.57	7.15	7.04	6.45	7.92	9.94	49%	39%
2	6.13	6.49	6.60	6.71	6.37	7.31	9.68	45%	47%
0	1.06	1.10	0.55	0.34	0.13	0.63	0.27	11%	-51%
3	129.7	153.7	213.1	154.7	121.8	105.4	134.5	37%	-37%
01	19.24	22.30	16.40	7.42	2.48	8.35	3.67	2%	-78%
1	799.8	875.1	791.3	702.2	642.9	793.0	1,209.5	51%	53%
0	1.3	2.2	0.2	0.0	5.1	1.4	1.9	-93%	975%
1	<b>801.1</b>	<b>877.4</b>	<b>791.5</b>	<b>702.2</b>	<b>648.0</b>	<b>794.4</b>	<b>1,211.5</b>	<b>46%</b>	<b>53%</b>
8	184.0	225.9	259.3	224.1	154.6	197.9	434.2	23%	67%
7	234.1	245.2	211.3	181.3	160.3	198.9	246.4	22%	17%
7	80.2	122.3	107.5	129.4	173.8	188.7	278.6	370%	159%
2	498.3	593.4	578.1	534.7	488.7	585.6	959.2	56%	66%
4	184.2	157.0	152.4	133.8	146.3	146.0	219.3	18%	44%
6	682.5	750.4	730.5	668.5	634.9	731.6	1,178.5	47%	61%
3	<b>352.7</b>	<b>372.1</b>	<b>272.3</b>	<b>214.9</b>	<b>173.4</b>	<b>261.8</b>	<b>279.4</b>	<b>21%</b>	<b>3%</b>
5	<b>118.6</b>	<b>127.0</b>	<b>60.9</b>	<b>33.7</b>	<b>13.1</b>	<b>62.8</b>	<b>33.0</b>	<b>12%</b>	<b>-46%</b>
	16.8	25.6	35.9	28.4	28.2	19.0			
	2.1	1.9	1.3	0.9	0.0	0.0			
	0.3	0.5	0.3	0.1	0.2	0.0			
5	<b>99.4</b>	<b>99.0</b>	<b>23.5</b>	<b>4.3</b>	<b>-15.3</b>	<b>43.8</b>	<b>33.0</b>	<b>78%</b>	<b>41%</b>

# ANNEX 2.0 KEY OUTPUT TABLES

**Table 15.3** Output table for seafood processing for CloS and contextual geographical areas, 2021.

Seafood Processing										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	15,200	17,310	4,090	1,290	22,690	806.1	1,088.80	518.9	641.3	340
England	7,080	8,640	2,040	640	11,320	402.1	543.1	258.8	319.9	180
South West	1,220	1,400	330	100	1,840	56.8	76.7	36.5	45.2	35
Cornwall	190	230	50	20	300	8	10.8	5.2	6.4	15
Isles of Scilly	-	-	-	-	-	-	-	-	-	0
Cornwall and Isles of Scilly	190	230	50	20	300	8	10.8	5.2	6.4	15
Plymouth	270	320	80	20	420	11.4	15.4	7.3	9.1	0
CloS & Plymouth	470	550	130	40	720	19.4	26.2	12.5	15.4	15

**Table 15.4** Output table for seafood wholesale for CloS and contextual geographical areas, 2021.

Seafood Wholesale										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	14,930	16,110	5,820	3,430	25,360	1,037.30	1,524.80	571.2	813.1	1,770
England	12,720	12,900	4,670	2,750	20,320	831.1	1,221.70	457.6	651.4	1,470
South West	1,180	1,360	490	290	2,140	76.1	111.9	41.9	59.7	170
Cornwall	410	440	160	90	690	21.2	31.1	11.7	16.6	45
Isles of Scilly	-	-	-	-	-	-	-	-	-	0
Cornwall and Isles of Scilly	410	440	160	90	690	21.2	31.1	11.7	16.6	45
Plymouth	40	40	20	10	70	2.2	3.2	1.2	1.7	10
CloS+Plymouth	450	480	180	100	760	23.3	34.3	12.9	18.3	55

**Table 15.5** Output table for combined sector of seafood processing & wholesale for CloS & contextual geographical areas, 2021.

Combined Seafood Processing & Wholesale										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	30,130	33,420	9,920	4,720	48,050	1,843.40	2,613.60	1,090.00	1,454.40	2,110
England	19,810	21,540	6,710	3,390	31,640	1,233.20	1,764.80	716.4	971.3	1,650
South West	2,400	2,760	820	390	3,980	132.9	188.6	78.5	104.8	205
Cornwall	610	670	210	110	990	29.2	41.9	16.8	23	60
Isles of Scilly	-	-	-	-	-	-	-	-	-	0
Cornwall and Isles of Scilly	610	670	210	110	990	29.2	41.9	16.8	23	60
Plymouth	310	360	90	30	490	13.5	18.6	8.5	10.8	10
CloS+Plymouth	920	1,030	310	140	1,480	42.7	60.5	25.3	33.7	70

**Table 15.6** Output table for fishmongers / specialist seafood retailers, for CloS and contextual geographical areas, 2021.

Fishmongers										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	2,410	3,210	360	370	3,940	170.5	240.2	63.4	82.8	1,205
England	1,870	2,670	300	310	3,280	141.9	199.9	52.8	68.9	960
South West	70	80	10	10	100	3.8	5.4	1.4	1.9	115
Cornwall	10	20	-	-	20	0.7	0.9	0.2	0.3	25
Isles of Scilly	-	-	-	-	-	-	-	-	-	0
Cornwall and Isles of Scilly	10	20	-	-	20	0.7	0.9	0.2	0.3	25
Plymouth	-	-	-	-	-	-	-	-	-	5
CloS+Plymouth	10	20	-	-	20	0.7	0.9	0.2	0.3	30

**Table 15.7** Output table for seafood retail in supermarkets, for CloS and contextual geographical areas, 2021.

Seafood Retail in Supermarkets and Grocery Stores										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	12,600	20,300	2,290	2,360	24,950	586.7	644.4	401.6	431.1	48,115
England	10,340	17,040	1,920	1,980	20,940	492.5	541	337.1	361.8	41,180
South West	1,530	2,470	280	290	3,040	62.1	68.2	42.5	45.6	3,690
Cornwall	190	320	40	40	390	6.9	7.5	4.7	5	435
Isles of Scilly	-	-	-	-	-	0	0	0	0	5
Cornwall and Isles of Scilly	190	320	40	40	390	6.9	7.6	4.7	5.1	440
Plymouth	80	130	10	10	160	2.8	3.1	2	2.1	10
CloS+Plymouth	270	440	50	50	550	9.7	10.7	6.7	7.1	450

**Table 15.8** Output table for seafood retail in fishmongers and supermarkets, for CloS and contextual geographical areas, 2021.

Combined Seafood Retail										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	15,010	23,510	2,650	2,730	28,890	757.2	884.6	465	513.8	49,320
England	12,210	19,710	2,220	2,290	24,220	634.3	740.8	389.9	430.7	42,140
South West	1,600	2,550	290	300	3,140	65.9	73.5	43.9	47.4	3,805
Cornwall	200	330	40	40	410	7.5	8.5	4.9	5.4	460
Isles of Scilly	-	-	-	-	-	0	0	0	0	5
Cornwall and Isles of Scilly	200	330	40	40	410	7.5	8.5	5	5.4	465
Plymouth	80	130	10	10	160	2.8	3.1	2	2.1	15
CloS+Plymouth	290	460	50	50	570	10.4	11.6	6.9	7.5	480



# ANNEX 2.0 KEY OUTPUT TABLES

**Table 15.9** Output table for seafood foodservice in seafood specialist outlets, for CloS and contextual geographical areas, 2021.

Food Service of Fish, Crustaceans and Molluscs in Specialised Food Service Businesses										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	28,230	40,320	2,390	2,650	45,360	713.6	921.7	616.9	728.6	5,486
England	25,460	36,200	2,150	2,380	40,730	640.8	827.7	554	654.3	4,980
South West	5,070	7,150	420	470	8,050	110	142.1	95.1	112.3	727
Cornwall	1,910	2,690	160	180	3,030	35.6	46	30.8	36.4	227
Isles of Scilly	40	60	-	-	60	0.7	0.9	0.6	0.7	9
Cornwall and Isles of Scilly	1,950	2,750	160	180	3,090	36.3	46.9	31.4	37.1	236
Plymouth	220	330	20	20	370	4.5	5.8	3.9	4.6	29
CloS+Plymouth	2,150	3,080	180	200	3,470	40.8	52.7	35.3	41.7	265

**Table 15.10** Output table for seafood foodservice in non-specialist outlets, for CloS and contextual geographical areas, 2021.

Food Service of Fish, Crustaceans and Molluscs in Non-Specialised Food Service Businesses										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	51,840	74,030	4,390	4,870	83,290	1,310.30	1,692.40	1,132.80	1,337.90	32,199
England	46,520	66,160	3,920	4,350	74,440	1,171.10	1,512.60	1,012.40	1,195.80	28,577
South West	7,610	10,730	640	710	12,080	165.1	213.2	142.7	168.6	3,811
Cornwall	1,670	2,360	140	160	2,660	31.2	40.3	27	31.9	557
Isles of Scilly	70	90	10	10	100	1.2	1.5	1	1.2	25
Cornwall and Isles of Scilly	1,740	2,450	150	160	2,760	32.4	41.8	28	33.1	582
Plymouth	270	410	20	30	460	5.5	7.1	4.7	5.6	79
CloS+Plymouth	1,990	2,860	170	190	3,210	37.9	48.9	32.7	38.7	661

**Table 15.10** Output table for seafood foodservice in all outlets, for CloS and contextual geographical areas, 2021.

Combined Seafood Service										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	80,070	114,350	6,780	7,530	128,650	2,023.90	2,614.20	1,749.70	2,066.60	37,685
England	71,980	102,370	6,070	6,740	115,170	1,811.80	2,340.30	1,566.40	1,850.00	33,557
South West	12,680	17,890	1,060	1,180	20,120	275.1	355.3	237.8	280.9	4,538
Cornwall	3,580	5,050	300	330	5,690	66.8	86.3	57.8	68.2	784
Isles of Scilly	110	140	10	10	160	1.9	2.5	1.6	1.9	34
Cornwall and Isles of Scilly	3,680	5,200	310	340	5,850	68.7	88.8	59.4	70.2	818
Plymouth	490	740	40	50	830	10	12.9	8.6	10.2	108
CloS+Plymouth	4,140	5,940	350	390	6,680	78.7	101.7	68	80.4	926

**Table 15.10** Output table for combined seafood industry businesses, for CloS and contextual geographical areas, 2021.

Seafood Industry										
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Supply Chain Workforce Jobs	Induced Workforce Jobs	Total Workforce Jobs	Direct GVA (£m)	Total GVA (£m)	Direct Wages (£m)	Total Wages (£m)	Direct Businesses
Great Britain	137,630	184,500	24,720	17,190	226,420	5,542.90	7,582.00	3,770.20	4,894.40	92,840
England	106,690	146,540	15,870	12,830	175,240	3,869.60	5,134.10	2,764.70	3,411.60	78,787
South West	17,780	24,410	2,460	2,020	28,900	549.7	728.6	397.2	493.5	9,178
Cornwall	4,750	6,460	620	530	7,610	127.9	171.2	90.2	113.1	1,589
Isles of Scilly	110	150	10	10	170	2.3	3	1.8	2.2	44
Cornwall and Isles of Scilly	4,860	6,610	630	540	7,780	130.2	174.2	92	115.3	1,633
Plymouth	980	1,350	160	110	1,620	33.3	43.8	22.3	27.8	163
CloS+Plymouth	5,810	7,960	800	650	9,400	163.5	218	114.3	143.1	1,796

**Table 15.11** Output table for all industry businesses, for CloS and contextual geographical areas, 2021.

All Industry					
Area	All Direct Workforce Job FTEs	All Direct Workforce Jobs	Direct GVA (£m)	Direct Wages (£m)	Direct Businesses
Great Britain	28,760,070	34,383,760	1,996,498.30	1,111,409.30	3,130,105
England	25,241,080	30,133,620	1,749,713.10	985,680.80	2,779,740
South West	2,432,610	2,968,930	149,783.00	83,381.10	277,805
Cornwall	214,360	267,460	11,602.00	6,458.60	28,785
Isles of Scilly	1,040	1,360	59	32.9	225
Cornwall and Isles of Scilly	215,400	268,820	11,661.00	6,491.40	29,010
Plymouth	107,560	131,310	5,831.00	3,246.00	7,970
CloS+Plymouth	322,950	400,130	17,492.00	9,737.40	36,980

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<https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/nominalandrealregional-grossvalueaddedbalancedbyindustry>

ONS BRES, ONS UK Business Count, ONS Census of Population, ONS Workforce Jobs:

<https://www.nomisweb.co.uk/>



# AUTHORS

## Hazel Curtis

Hazel is an independent fisheries economics and management consultant with over 20 years of experience as Chief Economist for the public body Seafish. There, Hazel led the development of regular economic data collection from businesses in the seafood industry and a programme of providing analysis, evidence and expert advice to inform business and government policy decisions.

Hazel was a member of the European Commission's Scientific, Technical and Economic Committee for Fisheries (STECF), providing official advice to the Commission, and was President of the European Association of Fisheries Economists (EAFE). Hazel is a previously elected member of the Executive Committee of the International Institute of Fisheries Economics and Trade (IIEFT), the global professional association for fisheries economists. In 2016, Hazel was invited to be the independent chair of the Project Steering Board of the English Waters Scallop Stock Assessment Project. In 2018, Hazel was appointed as co-chair of a new economics expert working group at the International Council for the Exploration of the Seas (ICES), which provides science and advice on fisheries to member nations and the EU. Hazel is also a Board Trustee and Executive Committee member of Fishing into the Future, a charity led by fishermen working to improve fisheries management by improving communication and understanding among fishermen, scientists and managers.

## Jim Plunkett-Cole

Jim is a professional economist and analyst with 25 years of experience in local economic development, securing the highest levels of sustainable economic growth and competitiveness by informing economic development decision-making with cutting-edge evidence-based intelligence.

He has worked at all levels for public and private sector clients across the UK, including HM Treasury. Jim's experience covers every aspect of economic activity and competitiveness, but he specialises in the development of bespoke sustainable economic development models and analytical frameworks. He is a 'Future of Work Pioneer' and the UK's leading economic expert in issues surrounding contemporary working patterns and their implications for local economic development and planning. Jim has an excellent understanding of the increasingly important relationships which exist between economic development and social and environmental support and development (i.e., sustainable development). His work has covered the widest variety of sectors/issues, including Defence, Biotechnology, Information & Communication, Digital, Tech, Professional business services, Agriculture, Creative, Co-working, Homeworking, Floating off-shore wind (FLOW), Construction, Crisis recovery, Lithium recovery, Retrofit, Fishing & Seafood.

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## Cornish Fish Producers Organisation

CFPO was established in 1975 by local fishermen in Cornwall. Today, they are proud to represent fishermen from all over Cornwall and beyond who make up one of the most sustainable and diverse fishing fleets in Europe. It's a member-led organisation made up of over 175 vessels.

## Seafood Cornwall

Seafood Cornwall is led by the Cornish Fish Producers Organisation. It's the marketing arm that celebrates the seafood sector, the fishing community and healthy and delicious food. It's an initiative for every boat and fisherman in Cornwall, and for the many businesses that depend on Cornish fish and seafood.

