

PLYMOUTH CITY COUNCIL PLAN FOR SUSTAINABLE FISHING

Economic Development



BACKGROUND

This is the Executive Summary of the Plan for Sustainable Fishing 2020 produced by Arcadis, commissioned by Plymouth City Council, which will be launched for a public consultation in March 2020. It was developed through desktop research, interviews and workshops with the sector. We are very grateful for the time and support from partners in developing this report including; the fishing sector, landowners – Sutton Harbour Holdings, the neighbouring National Marine Aquarium and Plymouth Trawler Agents.

Please send comments to invest@plymouth.gov.uk

The brief was to produce a Sustainable Plan for Fishing, which looked at the sector, future trends, and the support needed to help the sector prosper. The report was produced as result of a commitment from the Council to support fishing, which is a key part of the city's heritage, to ensure it remains an important sector in the future.

The full report can be requested from:

Economic Development

Plymouth City Council

Ballard House

Plymouth

PLI 3BJ

PLYMOUTH FISHING QUARTER



INTRODUCTION

Plymouth's fishing industry is strong and resilient. The vision is to “deliver a coastal renaissance for fishing in Plymouth”. This forward-looking document sets out the context, key challenges and suggests possible actions to help the industry to continue to flourish. The report is broken into the following sections;

- The right facilities for the future
- Supporting people with a career in fishing
- Sustainability
- Policy support and lobbying
- The right business support for growth

CONTEXT

The Plymouth Fish Quay is part of Sutton Harbour, Plymouth, which is sheltered in a large natural harbour within 40km of **varied and prolific mixed fishing grounds, with over 80 commercial species landed** in the area. With a long fishing tradition and the wealth of its fishing grounds, the Plymouth fishing industry is strong and resilient. The existing Fish Market, run by Plymouth Trawler Agents (PTA), has gone from strength to strength since its relocation from the Barbican Fish Market and quay site on the West of Sutton Harbour in 1995. PTA have been pivotal in creating a vibrant regional hub for all sectors of the industry and maintaining Plymouth's reputation as a premier fishing port. Currently the local industry **directly employs in excess of**

480 fishers, however, when taking into account the wider supply chainⁱ of the fishing industry, it means that the total employment figures are more likely to be closer to 1920 in total.

About 50-60 per cent (by value) of the fish sold at the market arrives by land from the smaller surrounding towns and villages. **This shows that Plymouth Fish Market is a crucial element of the regional fishing industry and is vital for the sustainability of some of the smaller fishing communities who sent their catch through the Plymouth Fish Market.**

ARIEL IMAGE SHOWING PLYMOUTH'S WIDER FISHING INFRASTRUCTURE

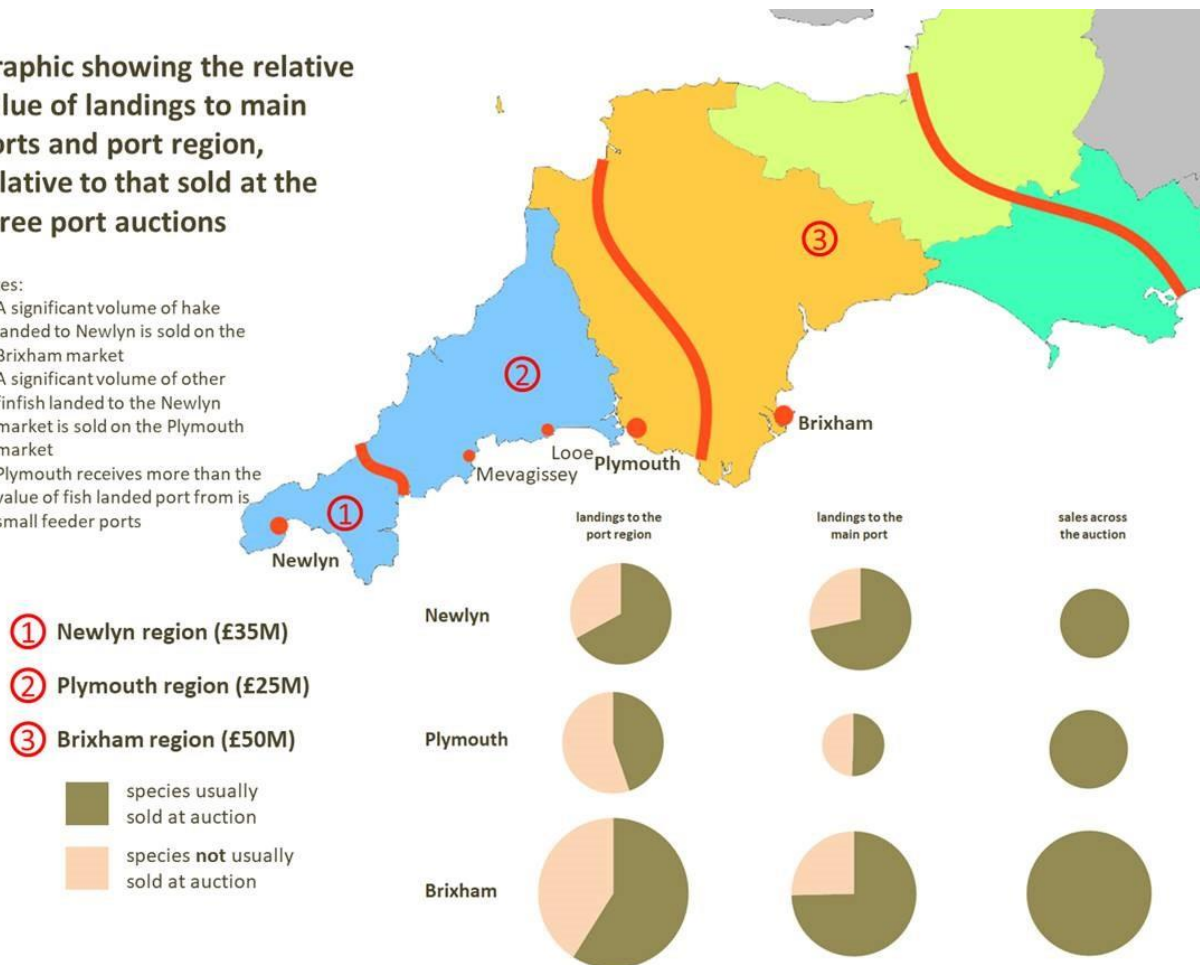


The Fish Market is well connected into the smaller fishing communities, with Plymouth Trawler Agents supporting a critical business eco-system for the fishing industry. The Fish Market also forms a key part of the wider regional network of the fishing and seafood sector, which ranges from Newlyn to Shoreham along the South coast and Northwards to the ports and harbours bordering the Bristol Channel, and even to the ports of South Wales.

Graphic showing the relative value of landings to main ports and port region, relative to that sold at the three port auctions

Notes:

- A significant volume of hake landed to Newlyn is sold on the Brixham market
- A significant volume of other finfish landed to the Newlyn market is sold on the Plymouth market
- Plymouth receives more than the value of fish landed port from its small feeder ports



Plymouth has better connectivity to major transport links, than other areas (e.g. Newlyn), which enables timely movement of fish to the customer. Speed of delivery has a direct impact on the price that the customer will pay: the faster the delivery, the fresher the fish and the higher the price.

Plymouth has access to prolific and profitable fishing grounds with large range of species.

Scientists have been reporting that over the last 15 to 20 years the health of the fish stocks in the north east Atlantic has steadily improved. The customer base is international. Fish landed in Plymouth is bought from as far afield as China. Closer to home in mainland Europe, the cross-channel ferry to France and Spain provides an important link to market.



The adoption of the Plymouth and South West Devon Joint Local Planⁱⁱ by the Council in March 2019, included specific policies on the development of Sutton Harbour and the Fish Quay (PLY26ⁱⁱⁱ). The Joint Local Plan confirms that the primary function of the Sutton Harbour Fish Quay is to support the fishing industry; any use that results in an adverse impact on the Fish Quay will not be supported.

The draft South West Inshore and Offshore Marine Plans, which have been recently launched by the MMO, strengthen the policies relating to fishing. They include policies to support the enhancement of access for fishing activities, as well as proposals to enhance fish habitat and policies to protect landside development that support marine activities including fishing.

The UK's departure from the European Union offers both an opportunity and a threat. Having gained control over the UK's fishing waters, there may be an opportunity to introduce a management systems better suited to the UK's fisheries and increase the amounts of fish caught. On the other hand, Michael Gove, Chancellor of the Duchy of Lancaster, has warned, "The UK will be outside the single market and outside the Customs Union, so we will have to be ready for the customs procedures and regulatory checks that will inevitably follow." Tariffs, regulatory checks and border controls would add complexity to the export process and could affect the value of the catch by increasing travelling times. It is therefore important to increase the efficiency

of the Fish Market and Fish Quay to support our fishers and other related businesses in this changing environment.



When, as seems likely, new customs procedures and regulatory checks are put in place, Plymouth Fish Market is likely to fare better than its regional competitors. The Fish Market's throughput incorporates a substantial proportion of day-boat fish and PTA sell to a wide range of national buyers whereas other major fish ports and markets are much more dependent on the export trade.

There are other policy developments that could advantage Plymouth's Fish Market. The Government has indicated its intention to possibly rebalance quota allocations between the under 10m fleet and larger vessels to the benefit of inshore vessels, and is exploring giving greater priority to low impact practices. Both could increase the volume of fish available to PTA. There is broad consensus across all stakeholders – industry, conservation NGOs, fisheries scientists, the UK Government, adjoining coastal states, the European Commission, and the European Parliament – about the need to maintain the effort build and maintain fish stocks at sustainable levels.

Yet despite these opportunities, the Fish Quay and Fish Market are facing challenges; they are already operating at and beyond their designed capacity and are unable to accommodate any further growth. Unless the Fish Market and Fish Quay can meet essential modern standards and increase capacity, there is significant risk of failure. Such a failure would irreversibly destroy a regionally important pillar of the fishing industry with consequences for the wider region.

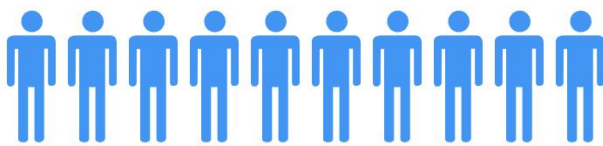
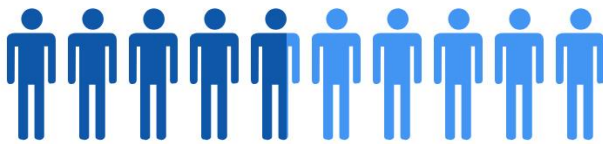
The Fish Market was once the pioneer of new technology. It was the first in the UK to adopt an innovative electronic auction in 1999. Now, the facility is aging and lagging behind more modern, wholly refrigerated facilities, which are better set out and use technology to ease and speed up process as well as to improve the working environment.

There is a clear and pressing need to regenerate the Fish Market and the Fish Quay.

Here lies the significant opportunity: to reinvigorate the industry by integrating a new Fish Market and Fish Quay facilities into a broader and more attractive offering, integrating the rich science and research community.

Forming a key element of UK's first National Marine Park (a non-designated landscape), collocated with the National Marine Aquarium, the Plymouth Fish Quay, centred in Sutton Harbour, should celebrate Plymouth's rich maritime and fishing culture (past, present and future) and promote and demonstrate the vision of a sustainable, vibrant, living, exciting, thriving and optimistic fishing industry. Reimagining the Fish Market and Fish Quay would not only benefit from but also contribute to the tourism offering for Britain's Ocean City. Further, new facilities, which integrate newer technology to improve working conditions, efficiency and safety, could play a part in attracting new workers into the industry.

Number of people employed in Fishing (x100)



480 directly
employed

1540 indirectly
employed

Average age

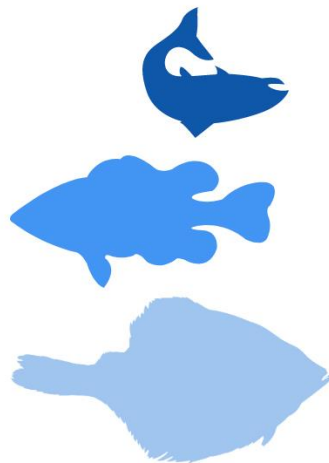
Skipper

54

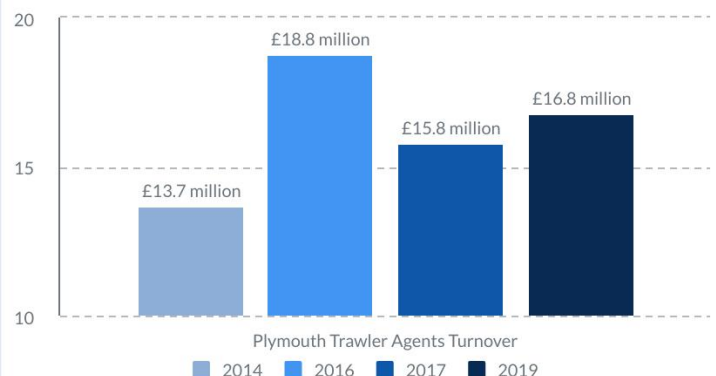
Crew

38

80+
different
species
landed in
Plymouth



Plymouth Trawler Agents Turnover







THE RIGHT FACILITIES FOR THE FUTURE

Sutton Harbour Holdings, who have invested in some new facilities, which has been welcomed, own the key infrastructure. While conducting the research underlying this report, it has been widely recognised that the future development of the sector in Plymouth is being held back by the current infrastructure. Limitations include aging infrastructure, poor facilities on the Fish Quay, failure to increase the capacity of the Fish Market to match throughput and future demand, coupled with increasing congestion in the Fish Quay, both on land and sea. Beyond the Quay, the Fish Market is disconnected from its locality and the city and is uninviting to visitors and tourists.

The Plymouth Visitor Plan¹ offers an exceptional vision for the future of the city, outlined in the bold and aspirational vision statement:

“Plymouth is Britain’s Ocean City, famous for its Waterfront. We will be one of Europe’s finest waterfront cities, celebrated for our unique and diverse marine life, culture and experiences. We will continue to be recognised as unique among UK cities for our natural drama and 500-year history as a place of embarkation and exploration.”

Improving the design would improve the visual appearance of the site and the overall sense of place in the wider Sutton Harbour area.

¹ <http://democracy.plymouth.gov.uk/mgConvert2PDF.aspx?ID=94808>

The challenge is to increase capacity at Fish Market. The Fish Market is poorly laid out and is frequently called upon to operate beyond acceptable capacity, further reducing efficiency. Therefore, it is recommended to:

- **Feasibility Study – Quick Win:** Do a detailed in-depth feasibility study into a hub & spoke model and a redesign of Fish Market/Quay buildings to increase capacity.
 - This should include the option of a refrigerated processing area, to remain competitive with peers.
 - Explore Victoria Wharf as an option to increase capacity for landing more and larger vessels.
- **Grading Machine:** Purchase an additional fish-grading machine, however this is dependent on additional space being identified.
- **Ice Machine – Quick Win:** Review ice machines and add/replace existing provision to provide the volume and quality of ice required by the industry.



Upgrade the facilities and operations at the quay and moorings, and improve security. There is additional capacity within the fishers' area of Sutton Harbour for small and medium sized vessels:

- **Layout of moorings –:** The layout of moorings could be redesigned to take account of turning circles, to reduce congestion and to increase the capacity for mooring.
- **Power & Water – Quick Win:** Add power and water at the moorings.
- **De-clutter the Fish Quay – Quick Win:** Remove obstacles from around the Fish Quay, such as netting, boxes, boat parts, create better storage facilities etc. and improve parking regulations to dramatically improve the space efficiency.

- **Investigate Charges-:** Other local ports charge less for services including fuel and mooring fees. Adjust charges to a more competitive level in line with other local ports.
- **Improve access to all ancillary services:** Fuel, Ice & Water:
 - **Fuel.** Investigate additional fuelling facilities within the wider port.
 - **Ice.** Improve access the fresh ice to fishing vessels.
- **Process Improvements.** Seek to reduce handling and waiting times for produce from boat to lorry,
- **Futureproofing:** Consideration should be given to adding facilities for charging electric boats in future, such as laying ducting during any renovation or rebuilding works.

Sense of Pride in Place

Branding – Quick Win: To enhance its sense of place, the Fish Quay should look to improve its physical approach, by placing eye-catching photographic images on scrim over the surrounding fencing and installing improved signage. In addition, information boards could be placed around the fishing quarter, that depict scenes from the past, the present fleet of boats, and the main species landed. This would help develop public interest and understanding and increase a sense of place.

The Box – Quick Win Plymouth's new cultural destination, should outline Plymouth's rich fishing industry heritage. The National Marine Aquarium (NMA) should follow suit; the collocation of the NMA with the Fish Quay should be developed into a symbiotic relationship, with visitors to one, signposted on to the other.

In the future, the national marine park will be an important opportunity, creating a brand covering the high quality marine environment and the quality of the fish and the fishing heritage. The Plan for Sustainable Fishing will be factored into the larger feasibility study on the National Marine Park to contribute to a holistic vision for Britain's Ocean City. A fishing quarter/national marine park heritage trail/touch points could be developed to help direct attention and visitors to the Sutton Harbour Fish Quay so that the public can reclaim the industry as their own.

Link Plymouth Fish Quay to Plymouth Seafood Festival – Quick Win: The Plymouth Seafood Festival^{iv} is incredibly successful and should be used to further the link to the Fishing Market and Quay. Other events could be used to build upon, e.g. by adding a fishing boat procession or a display of light linking to Illuminate or Christmas events.





SUPPORTING PEOPLE WITH A CAREER IN FISHING

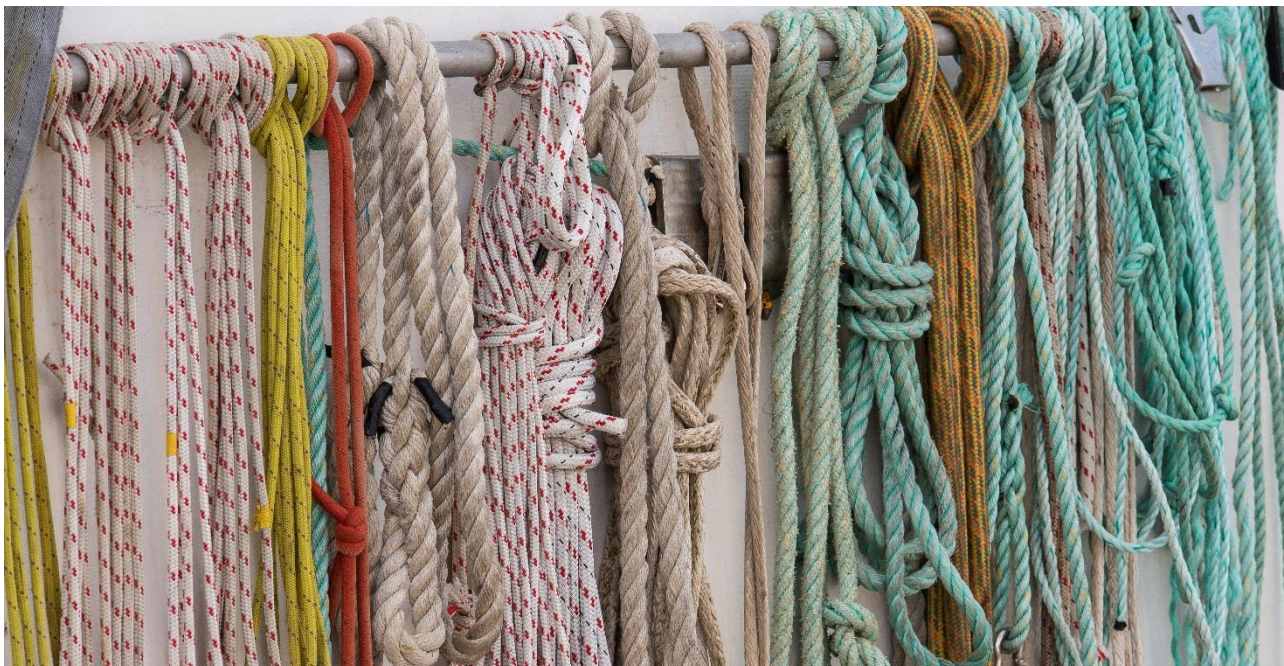
The number of fishers entering the industry has dramatically declined over the past 10 years, causing boats to have difficulty in attracting crew. Other significant issues are an aging workforce, difficulties in attracting new recruits and a perception of fishing being a low paid, dangerous and hard job. The sector has specific health and welfare issues, which can diminish the attractiveness of the sector.

- **National lobby:** Lobby at a national level for support to make a career in the seafood industry more appealing.
- **Women in fishing:** many fishing businesses are family businesses; traditionally women have a pivotal role in the shore-based financial management. In supporting the sector, it is important to engage with both the shore based and sea based workforce. In encouraging new entrants into the sector, it is important to reach out to women and other under-represented groups.
- **On-the-job training:** Lobby to change the apprenticeship rules to create a fishing apprentice or easy to access diploma. This could build on good practice in Scotland and Whitby Fishing Industry Training School. Encourage skippers and boat owners to give recruits time at sea to develop hands on experience. If new entrants were allowed to be classed as apprentices, the skippers could be given an allowance to train them. Support local training companies to deliver locally.
- **Service leavers – Quick Win:** Seek to recruit former military personnel through specialist recruitment companies such as Drake Recruitment, or by attending service leaving courses and recruitment fairs. Military leavers are eligible for training grants. Many service leavers are unaware of how to enter the fishing sector. A trial should be run to target them in their final six months, to gather evidence if the fishing industry as a sector that would potentially appeal to them.
- **School leavers:** Target school leavers at STEM conferences and career fairs to highlight career opportunities, including highlighting opportunities that are shore based or within the aquaculture sector.
- **Career advancement and succession:** Nationally, the average age of a boat skipper or owner is now 54 and the average age of crew is 38. Given the physical nature of the job, this is neither a viable nor a sustainable option for the long term. Succession planning alongside growth and attracting a younger workforce is key to the long-term viability of the sector.
- **Living Wage:** Encourage where possible employers to increase salaries from the minimum wage to a living wage. This will also assist in employee retention.
- **Automation:** Reduce job tedium from repetitive and manually intensive seafood processing procedures, by investing in automatic handling, grading and filleting equipment.

Health and well-being: Due to the uncertain nature of the job it is very difficult for fishers to make, and keep, health appointments. There is also a concern that the mental health of fishers, particularly skippers, is strained due to the demands of management, understanding legislation and new rules.

Fishermen's Mission: Increase the presence of the Fishermen's Mission.

- Educate and promote the benefits of the Fishermen's Mission to fishers and their families. The mission offers support to families of current fishers and those that have retired or been lost at sea.
- Services include financial and well-being advice, as well as financial support.



Fishers' Choir – Quick Win: Organize a fishers' choir. It is well known that singing not only creates a feeling of well-being but keeps alive the history of the sea through shanties and storytelling.

- **Regular Health and Wellbeing Clinics:** Encourage Seafit to organise regular health and well-being clinics. Previous clinics organised by the charity Seafit, providing health and dental checks, as well as physiotherapy and health advice, have been well received.
- **Pension & Retirement Advice:** Provide advice on pension and retirement. Many fishers have no private pension schemes in place and rely on selling their vessels to fund their retirement. Educating and encouraging the fishing community to plan for their future will allay some of their fears. It may also encourage earlier retirement, as many believe they cannot afford to stop working until they are no longer able to go to sea.
- **Sea Safety Refresher Courses:** Encourage fishers take advantage of the free sea safety refresher courses available through Seafish.

Pride: Celebrate and promote the culture and heritage of the fishing community that has existed for the better part of a millennium. Fishing is regarded as one of Plymouth's cornerstones, it can be argued that without the fishing industry the city would not be the thriving community it now is. The fishers that risk their lives daily on the sea are held in awe by many, but to encourage that tradition continues and is celebrated well into the future, we must encourage that the following are put into place:

- **Create a promotional video – Quick Win:** Create an informative video that shows the changes through history, of the fishing industry in Plymouth. Feature the colourful characters from the Fish Quay. Show the video as part of the Ocean Festival film screening.
- **Guided Tours – Quick Win:** Re-establish the guided tours of the Fish Market, culminating in a meal at one of the local seafood restaurants; this was previously run by the harbour master.
- **Use VR technology** to create a virtual fishing experience, this could utilise facilities at Devonport Market hall, installing a sense of pride in the skills needed to be a fisher.





SUSTAINABILITY

- Plymouth would look to pilot and be a test facility for cleaner propulsion systems in the fishing fleet e.g. electric and hydrogen
- Any regeneration of the Fish Market and Fish Quay should incorporate high quality sustainable standards. This should include solar panels, high standards of insulation and waste management.
- Working in conjunction with the national marine park, to ensure that the fishing industry recognise that the already regulated, designated areas represent an opportunity to add value by creating nursery areas that help promote sustainable fishing.

POLICY SUPPORT AND LOBBYING

Lobby to **make Plymouth the administrative capital of UK fishing**. Future capabilities could include, the **main location for Fisheries licencing** – (under the future fisheries bill the UK will have one single lead agency responsible for issuing licences to non UK vessels. The city already has a significant critical mass of expertise and resources. The existing resources include;

1. MMO are located in Plymouth, Plymouth is a significant lead for future fisheries development (Remote Electronic Monitoring - CCTV on vessels)
2. MMO/DEFRA operate regional quota management groups with Southwest inshore fishermen quarterly from Plymouth
3. **Fisheries Science:** CEFAS are located in Plymouth, CEFAS operate a number of Fisheries Science Partnerships and other innovative projects from Plymouth across the Southwest. Maritime and Coastguard Agency (Survey and Inspection office are located in Plymouth)

Lobby to **ensure the best deal for Plymouth fisheries in the trade deal negotiation with the EU** to ensure our mixed fleet grows and prospers.

Support the Devon and Severn Inshore Fisheries and Conservation Authority to deliver their work, in a way which secures the right balance between social, environmental and economic benefits to ensure healthy seas, sustainable fisheries and a viable industry



THE RIGHT BUSINESS SUPPORT FOR GROWTH

There is a body of research, which shows that businesses which take and act on external advice are more likely to prosper. The fishing sector has specific business challenges particularly around access to finance, developing new markets and innovating to remain competitive

Raising Finance: The fishing sector has particular issues regarding raising finance to support growth and help new entrants into the sector. Short leases and uncertainty around future policy regarding the negotiations regarding exiting the Common Fisheries Policy are specific challenges for the sector. The Council should investigate access to finance and investor readiness support. This could be done in conjunction with the Growth Hub.

Investigate developing a Plymouth Fisheries Co-operative or special purpose vehicle:

Fishing co-operatives have been used successfully in other areas, to market local produce, access grants, provide business support and help with safety equipment. The Marine and Fisheries Fund, which was launched in 2019, will be an important source of finance. Unlike its predecessor, this fund cannot be accessed by Local Authorities. The fund could provide a mechanism to develop the sector, access grants and to facilitate recommendations in this report. In addition, the Council has a Co-operatives and Mutual Fund that is able to provide investment into Co-operatives.

Consideration should be given to establishing a cooperative for the fishers of Plymouth. Fishing co-operatives can play an important role in fisheries management. Through co-operation, fishers can negotiate systems of management and control between themselves. Co-operative structures enable the fisher to share risk, make savings through creating economies of scale, facilitate sharing best practice and possibly to access new markets. In doing so, fishers can secure a viable future for fisheries and the industry itself.

Funding to buy boats and access fishing opportunities: Explore different financing options to allow young skippers to buy their own vessels, including rent to buy and community funding.

Vessels sold with licenses: Work with producer organisations and fishing cooperatives to encourage that owners' vessels are sold with their licences, rather than having them sold as separate entities, thus keeping boats in the local fleet.

Developing local markets for local seafood products: Activities that generate and build local markets will help add value to local fish and diminish food miles. **Trademark:** Create a fishing trademark that can be used locally by vendors selling Plymouth fish. **Buy Local:** Encourage local restaurants and fish & chip shops to buy and promote local fish.

Export Market: Plymouth's connection to EU markets is important. With France and Spain being the first and third export countries by value for UK seafood exports⁹, the port infrastructure and the ability to export fish from Millbay (ABP) is crucial. To protect the industry, there is a need to lobby to maintain the ability to export and to create the infrastructure needed to maintain these lucrative markets in future



Quick Win: Promote dedicated funding available for innovation which will bring benefits to Plymouth's fishing industry

Innovation: Plymouth benefits from world leading marine research institutions (Plymouth Marine Laboratories, Marine Biological Association and University of Plymouth). There is an opportunity to connect these institutions and the fishing sector, to drive innovation, particularly around clean growth. Plymouth should look to position itself as a test area for new technology. It has considerable advantages such as: a large and diverse fleet and fishing grounds; proximity to research institutions and a more mature marine innovation ecosystem around marine business technology centre and autonomy.

There are already pilots being developed, for example:

SAFEGEAR: A pilot by the Blue Marine Foundation which makes fishing gear visible and trackable whatever the weather through the use of AIS – automatic identification system using beacons attached to nets. Looking forward the project team are trying to establish a cohort trial in Plymouth. In total 280 beacons are being produced for trialling across varying gear types.

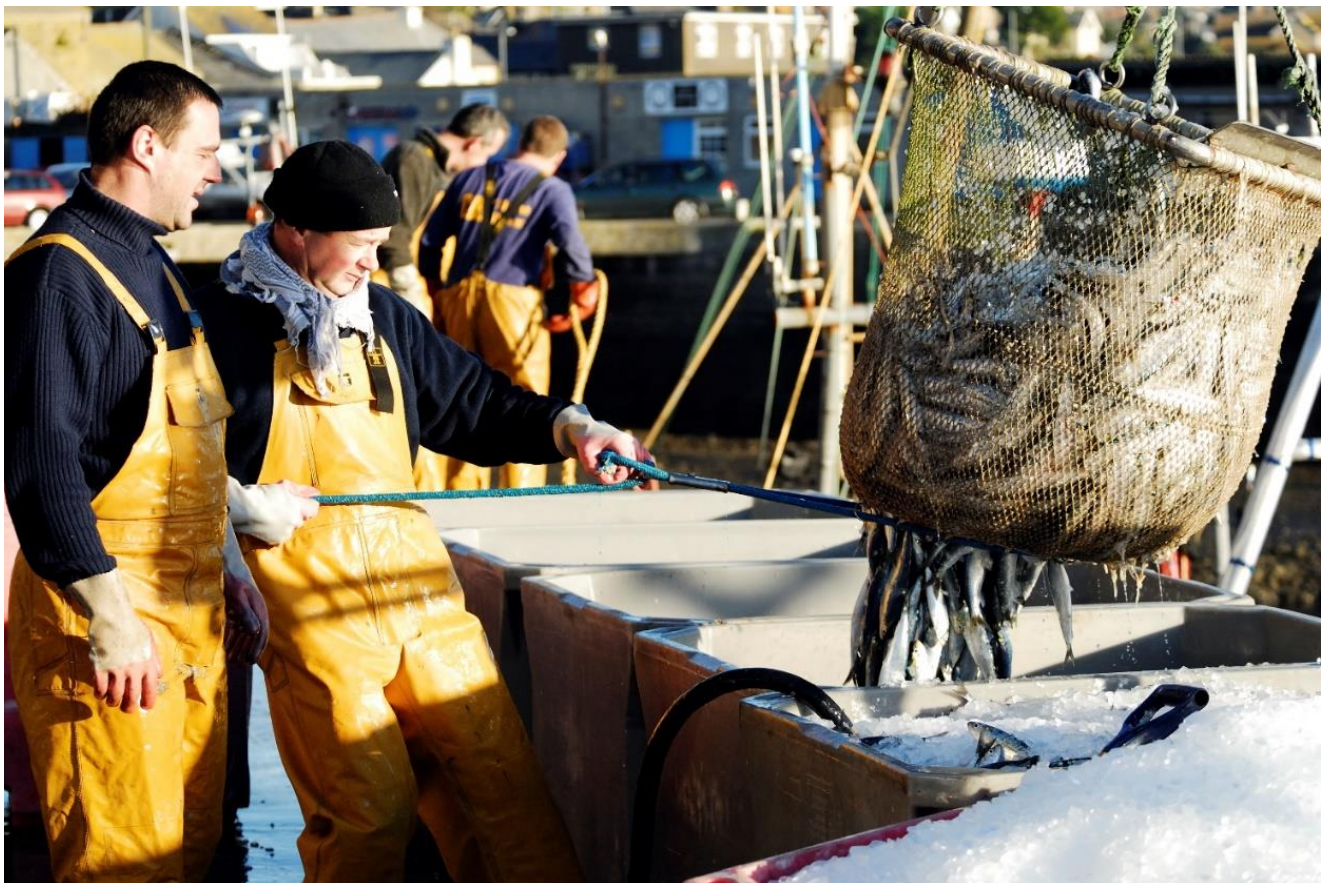


Other areas which could be explored include alternative propulsion systems, to move away from high carbon emissions; working with the sector to develop ways in which the industry can assist in ensuring a healthy and productive marine environment; the use of technology to improve safety at sea, particularly around boat stability; and the use of technology to improve vessel monitoring, deliver efficiencies in the fishing and seafood industry and improve marketing.

Promote Plymouth as a regional hub: Plymouth Trawler Agents have an excellent website packed with information about the port www.plymouthtrawleragents.com. This gives an excellent platform to encourage more boats to sell through Plymouth. There is an opportunity to drive traffic through social media, this should be through multiple channels. Raising the profile and awareness of Plymouth as a regional hub will be part of a package of measures to generate further growth and will help raise the profile of the Fish Market. Investigate grant funding available to establish a presence at trade shows, e.g. the London Seafood Expo.

Recreational Sea Angling. The South West is regarded as the mecca of sea angling amongst Britain's 884,000 recreational sea anglers. The combined expenditure on fishing tackle, charter trips, bait, boats, clothing, travel and accommodation exceeds £165m. Plymouth once held pride of place, as being the premier angling port on the South Coast, this has been gradually eroded by ports such as Dartmouth and Weymouth. We have a unique opportunity use the National Marine Park to once again bring Plymouth to the forefront of recreational sea angling:

- **Fishing Competitions:** Well-sponsored fishing competitions could draw international competitors. This would create additional tourist revenue as well as promoting the amazing fishing the area has to offer.
- **Easy Access:** Angling is a sport that should be accessible to almost every person and participation should be encouraged. Studies show that there are major health benefits to angling. We should ensure that access to angling areas is made available to young people and anglers with disabilities. Other ports have specialist charter boats that cater for anglers with disabilities; these boats are typically booked a year in advance.



CONCLUSION

The report highlights the many challenges and recommendations that could help Plymouth become the centre for fishing in England. We are entering a time of change, both through the opportunities, of becoming an independent coastal nation and the creation of the UK's first National Marine Park. It would be remiss to not take advantage of this once in a lifetime opportunity. With the cooperation of the partners that are central to the fishing community and acceptance of the recommendations, we will be well placed to ensure that fishing in Plymouth not only survives, but thrives.

ⁱ https://www.seafish.org/media/Publications/2006_I-O_Key_Features_Final_090108.pdf

ⁱⁱ https://plymswdevonplan.co.uk/assets/images/user_content/files/Plymouth-and-South-West-Devon-Joint-Local-Plan.pdf

ⁱⁱⁱ <https://plymswdevonplan.co.uk/policy/so3/ply26>

^{iv} <https://www.visitplymouth.co.uk/whats-on/top-events/plymouth-seafood-festival>

^v https://www.seafish.org/media/publications/SIF7_FS_March_2017.pdf