Brexit’s potential impact on the marine sector
A note from the NSC Marine Resources Group

Context

In 2014, the fishing industry employed 11,845 fishers in the UK and contributed some £426 million to GDP. Fisheries have on the other hand a much broader cultural, social and historic value. Fisheries are also crucial to the prosperity of many coastal communities across the United Kingdom. Fisheries management is a devolved matter, and the Devolved Administrations manage vastly different industries: the Scottish fishing fleet has fewer but larger vessels and lands the most fish in terms of volume as well as value, whereas England, Wales and Northern Ireland have more fishers and vessels.

UK waters are furthermore highly important for fishermen from other European countries. More than half (58%) of the fish and shellfish landed from the United Kingdom’s Exclusive Economic Zone (EEZ) by European Union fishing boats was caught by non-UK boats. Non-UK European fishing boats landed 650,000 tonnes of fish and shellfish from the United Kingdom’s EEZ, worth £408 million, each year. This included 99,000 tonnes (£179 million) of demersal fish, 424,000 tonnes (£183 million) of pelagic fish, 16,000 tonnes (£34 million) of shellfish, and 111,000 tonnes (£11 million) of industrial fish.

The North Sea region already have experience with agreements with non-members with different connections to the EU. While fisheries is not a part of the EEA-treaty, the EU-Norway relationship is well established in the fishery sector with annual agreements.

The future of the Common Fisheries Policy

The Common Fisheries Policy gives fishers registered in any Member State enjoy equal access to fishing in the 12–200 nautical miles of the EU zone. However, most commercially-fISHED stocks in EU waters are regulated through quotas that determine which quantities of a given fish stock a vessel may catch each year. Withdrawing from the EU will inevitably mean withdrawing from the Common Fisheries Policy. The Common Fisheries is for many in the UK seen as unfit for purpose, and a new managing system post Brexit is therefore seen more as an opportunity than a disadvantage for the fisheries sector. The dynamic nature of fisheries management in Norway and Iceland compared to the EU supports this argument.

The UK has also been allocated €243.1m in subsidies between 2014 and 2020 under the CFP. After Brexit, those subsidies will end. The Government will need to consider whether to continue subsidising the fishing industry. On the other hand, the management system could be different and thus requiring different support.
A number of the stocks in UK water are shared with the EU, Norway or the Faroe Islands. Cooperation regarding a sustainable management of shared stocks will be part of the negotiations.

Non-UK European fishing boats landed 650,000 tonnes of fish and shellfish from the United Kingdom’s EEZ, worth £408 million, each year between 2012 and 2014. UK fishing boats landed 90,000 tonnes of fish and shellfish, worth £103 million, from other areas of the European Union’s EEZ during the same period. Non-UK European fishing boats landed seven times more fish and shellfish (by weight) from the United Kingdom’s EEZ than UK boats did from other areas of the EU’s EEZ, and four times more by value. This underlines the importance for non-UK fishing boats to access UK waters.

For UK, market access is crucial. Putting it simple, the UK sells all fish they catch and import the fish they eat. Continued access to free, or preferential, trade in fish and seafood will therefore be crucial for the seafood industry and UK consumers.

**Maritime law in the North Sea**

The relationship between EU and UK post-Brexit is no longer governed by EU law, including the Common Fisheries Policy (CFP). International law will however still be in place to govern the relationship. The most relevant legal documents for fisheries will be the 1982 United Nations Convention on the Law of the SEA (UNCLOS) and the 1995 Fish Stocks Agreement. The UNCLOS gives the coastal state sovereignty in its own EEZ. Neighbouring states are however required to find solutions to manage shared stocks. Coastal states that cannot fish the entire total allowable catch (TAC) must give other States access to the surplus. As most of the stocks in UK water are shared, some level of shared management is not only desirable but inevitable.

**Next steps**

Despite fisheries’ prominent role in the Brexit campaign, there has been widespread concerns that fisheries will be pushed aside in the negotiations due to this relative economic insignificance. In the June 2017 Queen’s Speech, the Government announced a 'Fisheries Bill' for the upcoming Parliamentary session. Its purpose is to "enable the UK to control access to its waters and set UK fishing quotas once it has left the EU."

Fisheries is more than its economic significance, or lack of in comparison with other sectors. It has strong historical ties and is highly important for marine environment and livelihood in coastal communities. It is regarded the one area where there really could be conflict if it is not in place early after Brexit day 1.
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