

WHITEHAVEN PLAICE LANDING & PROCESSING FEASIBILITY STUDY

(Executive Summary)



Report commissioned by:



West of Morecambe Fisheries Ltd

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***Tegen Mor Fisheries Consultants Ltd (in collaboration with
Forte Finance Ltd, Project Link Ltd & Red Dragon Associates Ltd)***

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Background

The West of Morecambe Fisheries Ltd is a not-for-profit UK company established in 2013, funded by the owners of the several UK offshore wind farms.

The company manages funding donated by offshore wind farm owners, provided for the purpose of supporting and developing commercial fishing activities. The donations can finance, set up and support 'community projects' that are of direct benefit to the fishing industry that operates in the same areas as the wind farms. The fund works closely with relevant sectors of the fishing industry to identify suitable fishing community projects.

At Whitehaven in NW England, key local fisheries stakeholders (Whitehaven Fishermen's Co-operatives, Whitehaven Harbour Commissioners and Sea Source / Anglo North Irish Fish Producers Organisation) identified a community project to examine the feasibility of developing the market for Irish Sea Plaice landed at Whitehaven, through processing at Whitehaven or elsewhere.

The long-term objectives of the study were to identify the potential to:

- i. Increase income to North West England fishermen and Northern Irish fishermen.
- ii. Increase use of the landing facilities at Whitehaven Harbour.
- iii. Provide a sustainable use of under-utilised space in Whitehaven Fish Hall.



Whitehaven fish market hall

Executive summary:

Under the auspices of the West of Morecambe Fisheries Ltd Company, fisheries stakeholders at Whitehaven on the NW Cumbrian coast identified a community project to examine the feasibility of processing plaice. The project sought to identify: a) how the first sale price of plaice landed locally could be increased; and, b) sustainable uses for the under-utilised fish market facility at Whitehaven.

A multi-discipline consultant team¹ led by Tegen Mor Fisheries Consultants Ltd was appointed to undertake a detailed financial, technical, and practical supply-chain appraisal of a range of scenarios.

The local fleet consists of fifteen vessels, with most using mobile gears to target seasonal *Nephrops* and scallops (*Pecten maximus*) fisheries. Most plaice landed are taken as by-catch by vessels trawling for *Nephrops*. In 2015 26.9t tonnes (worth £19.9k) of plaice were landed, accounting for 1.2% of local landings by weight and less than 1% by value. Plaice landings were highly seasonal, with over 90% of annual landings being made between the months of June and October. The sizes of plaice landed were mostly on or slightly above the Minimum Conservation Reference Size (MCRS) of 27cm. These fish would be an EU size grade 4 and equate to a weight of between 170-220grams.

Demand for plaice (whole or filleted) from UK retail, foodservice and wholesale markets were low due to the small size of fish, low volumes available and concerns over sustainability ratings. The majority of plaice landed by UK vessels was exported (or landed directly) to specialist plaice processors in Holland. The Dutch are both the biggest importers and exporters of plaice in Europe with the main end market demand being from Italy.

FAO guidelines report the skinless yield of plaice (fillet weight as a percentage of whole gutted weight) to be 30-35%.

A range of plaice processing scenarios was developed, ranging from relatively low technology to a state of the art automated plaice filleting line. The business case for plaice processing in Whitehaven was weak in all cases due to the small size (and therefore yield) of fish, poor market demand and interrupted availability of raw materials. Other scenarios to directly retail fish (through a Community Supported Fishery (CSF)) or partnering with an existing processor were also explored. The business case for retailing fish was weak but there appeared to be scope to increase the value of first sale landings by 33% (vs 2016 prices) through development of a commercial relationship with one of two processors. Other broader scenarios, looking at Whitehaven's landings as a whole, were developed and these could provide a sustainable long-term use of the fish market.

The fish market building in Whitehaven and services provided by the Whitehaven Fishermen's Co-operative (i.e. ice, water, cold storage) were strategically important to the local fleet and to the considerable number of larger visiting vessels that use the port at different times of the year. The fish market building was found to be in good overall order although would benefit from investment to improve cold storage refrigeration. The prime harbour-side location of the building also provided for some potential diversification into non-fishing activities and it is recommended that this area be investigated further.

¹ Consisting of: N de Rozarieux (Tegen Mor Fisheries Consultants Ltd), S Cadwallader (Red Dragon Associates Ltd), A Knott (Forte Finance Ltd) and D Williams (Project Link Ltd).