



**Isle of Man
Government**
Reillys Ellan Vannin

FUTURE FISHERIES

Department of Environment Food and Agriculture



A **five-year strategy** for the sustainable development of the Isle of Man's sea fisheries and marine environment

2016 - 2021

**FOOD
MATTERS**

OUR VISION:

“ A sustainable, thriving and well-managed fishing industry providing high-quality seafood products, supported by respect for the marine environment. ”



Fishing and seafood have been an integral part of our Island culture for centuries. Manx seafood is worth around £13m per year to our economy and this traditional industry provides us with a valuable source of renewable, high-quality food; diverse, island-wide jobs; and maintains links with our neighbours and maritime heritage.

Over time, the species we catch have changed - shellfish, such as scallop and lobster, are now more important than fish. Alongside this, the way that fishing is undertaken has also changed. Sustainable fishing (matching the catch with the amount replacing it) is now the primary goal of fisheries managers and industry, but this is complex and requires a scientific approach, regulation and resourcing.

We also recognise the difficulties faced by industry in recent years, including poor weather, an increasing number of boats fishing the Irish Sea and the decline of some stocks, notably queen scallops.

In response, my Department has undertaken to manage these situations and, in the case of queen scallops, we are now in the second year of a long-term stock rebuilding strategy:

one that aims to regain our Marine Stewardship Council certification, thereby demonstrating our commitment to sustainable fisheries. In recognising that all stakeholders are critical to fisheries and marine management, this strategy has been developed with significant input from industry and conservation organisations. Ongoing stakeholder involvement in collecting data, conducting surveys and developing a longer-term stewardship role will remain vitally important to our future fisheries.

I recently launched the 'Food Matters' strategy aimed at increasing the profile and value of our distinctive local food and drink. This initiative contains much that will assist the seafood industry to adapt and grow, finding ways to identify new products, increase their value, diversify and remain competitive in an international market. Our aim is to maximise the return on public and private sector investments.

Our seas contain some of the best scallops, lobsters, crabs and whelks in the world and we have the capability to manage them successfully. The Isle of Man is a world-leader in scallop fisheries science, and we have introduced innovative management solutions and exciting projects with the potential to deliver security and increased value for local

fishermen, for example, the Ramsey Bay scallop fishery and Baie ny Carrickey lobsters.

This sea fisheries strategy will build on such initiatives, providing opportunities for collaboration and business development as well as training, development and support schemes. I believe strongly that seafood can make an increasing contribution to our economy with the potential to grow through value-adding, improved marketing and diversification of products.

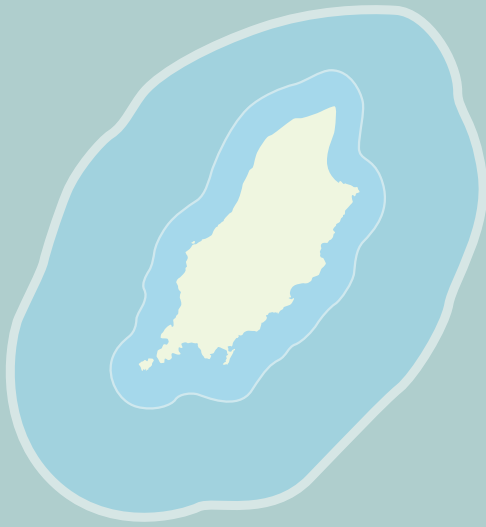
The development of truly sustainable fisheries will put us in a position to compete strongly and help realise their full potential, and I will be calling on everyone involved in the fishing industry and marine environment to play their part in delivering this strategy.

Richard Ronan

Hon. Richard Ronan MHK,

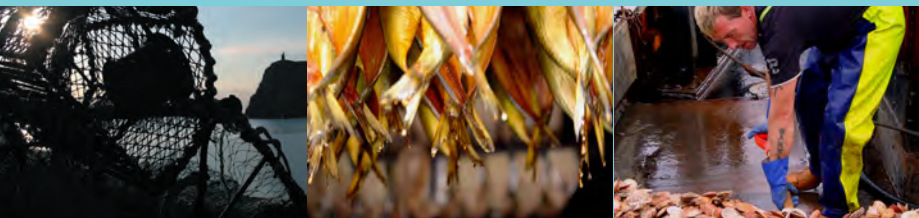
Department of Environment, Food and Agriculture

The Manx territorial sea makes up 87% of Manx territory



Our vision will deliver

- High-quality, protected marine environment
- Increased customer and market focus
- Sustainable and diversified fisheries
- Fishing effort matched to stock size and based on quality data
- Value added fisheries with sustainable economic value
- Increased involvement in management for marine stakeholders



Isle of Man sea fisheries

- At a value of £13m GDP, seafood is an integral part of the Island's distinctive food and drink sector, highlighted in the Food Matters Strategy published in 2014 by DEFA.
- However, fish stocks are limited, and most countries recognise that today's fishing activities should reflect the need to conserve stocks for the future. This requires good scientific data, effective management and, importantly, resources for implementation.
- The Isle of Man Government manages fisheries inside the territorial sea – and has recognised the need to strategically support a sustainable marine environment.
- Industry consultation has identified numerous marine and fisheries management objectives to be incorporated into a 5-year Sea Fisheries Strategy.

Government, industry, scientists and other stakeholders must work together to protect the marine environment, seafood production and fishing and processing jobs; helping to deliver a greater contribution to the Manx economy and our distinctive local food and drink sector.

Fisheries management challenges:

- Safeguarding and growing 300 industry jobs on Island
- Implementing an effective science-based fisheries management programme
- Maintaining relationships with a diverse range of on and off-island stakeholders
- Targeting finite Government resources to best support industry

SEA FISHERIES AT A GLANCE

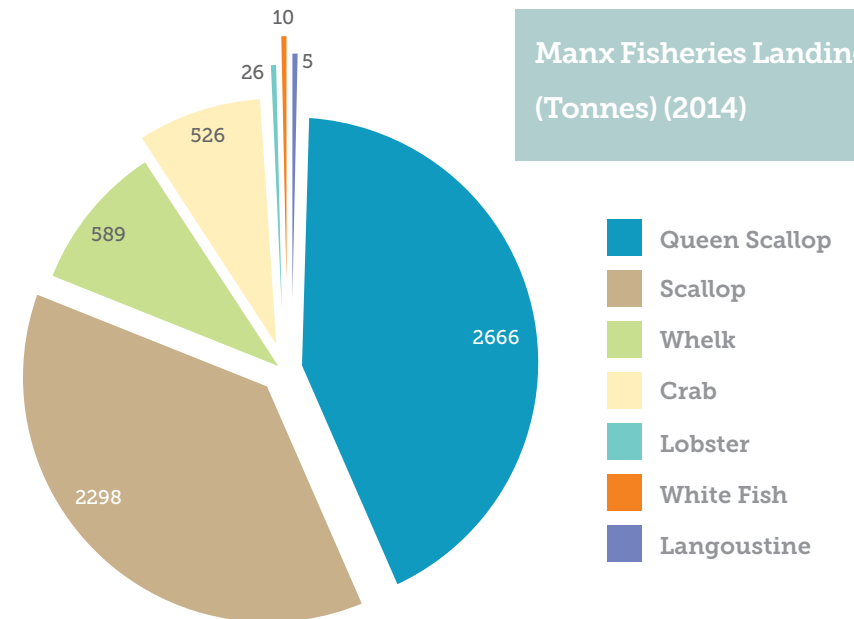
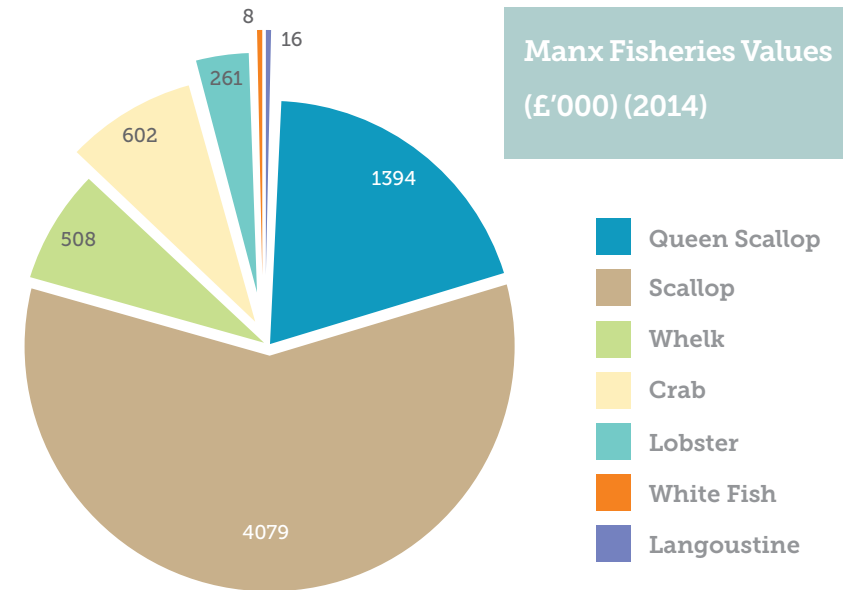
Local seafood

- Our sea fisheries generate five major products; king scallop, queen scallop, lobster, brown crab and whelk. Small quantities of fish and prawns are also produced.
- Most of this (96%) is exported, to the UK, France, Spain, Italy and Korea.
- Scallop and queenie processing is a major Manx industry (see right).
- Smoking of imported herring adds value to produce Manx kippers, another famous local seafood.



Local value

Our fishing and seafood industry is worth £7m per year at first landing, and £13m overall to our economy. The industry directly employs around 300 people across the Island's towns. Indirect benefits from the industry, estimated at £44m, are seen island-wide throughout the hospitality and retail sectors.



STRATEGY PRIORITY THEMES

RESOURCES

The Sea Fisheries Strategy has been developed in consultation with key local stakeholders and identifies priority action areas within 5 key themes:

MANAGING SEA FISHERIES	SAFEGUARDING THE MARINE ENVIRONMENT	DEVELOPING OUR SEA FISHERIES	MANAGING RESOURCES	WORKING WITH OUR CUSTOMERS
Appropriate level of fishing effort	An ecosystem approach	Increase economic value of sea fisheries	Integration with Food Matters Strategy	Industry specific training and education programmes
Science data for all stocks	Marine spatial management	Increase product quality, value & innovation	Restructure and promote existing funds	Greater involvement in decision making
Achieve sustainable stocks	Integrated marine monitoring programme	Diversified mix of species and seafood businesses	Use whole-of-Government resources for business development	Co-management projects
Regionally-relevant management	Improve stakeholder involvement	Improve marketing programmes	Investigate alternative external funding sources	Greater responsibility for stewardship
Licencing: good value and a management tool	Marine development and exploitation in harmony with environment	Strategic business/market development		Work with regional partners on common issues
Effective local enforcement				
				

DEFA is committed to prioritisation of existing resources and identifying new funding options:

Financial support:

- Existing schemes can be restructured & promoted
- New funding is available via the Food Matters Strategy

Advice and training:

- Fisheries management
- Business planning
- Economic analysis

Specialist services:

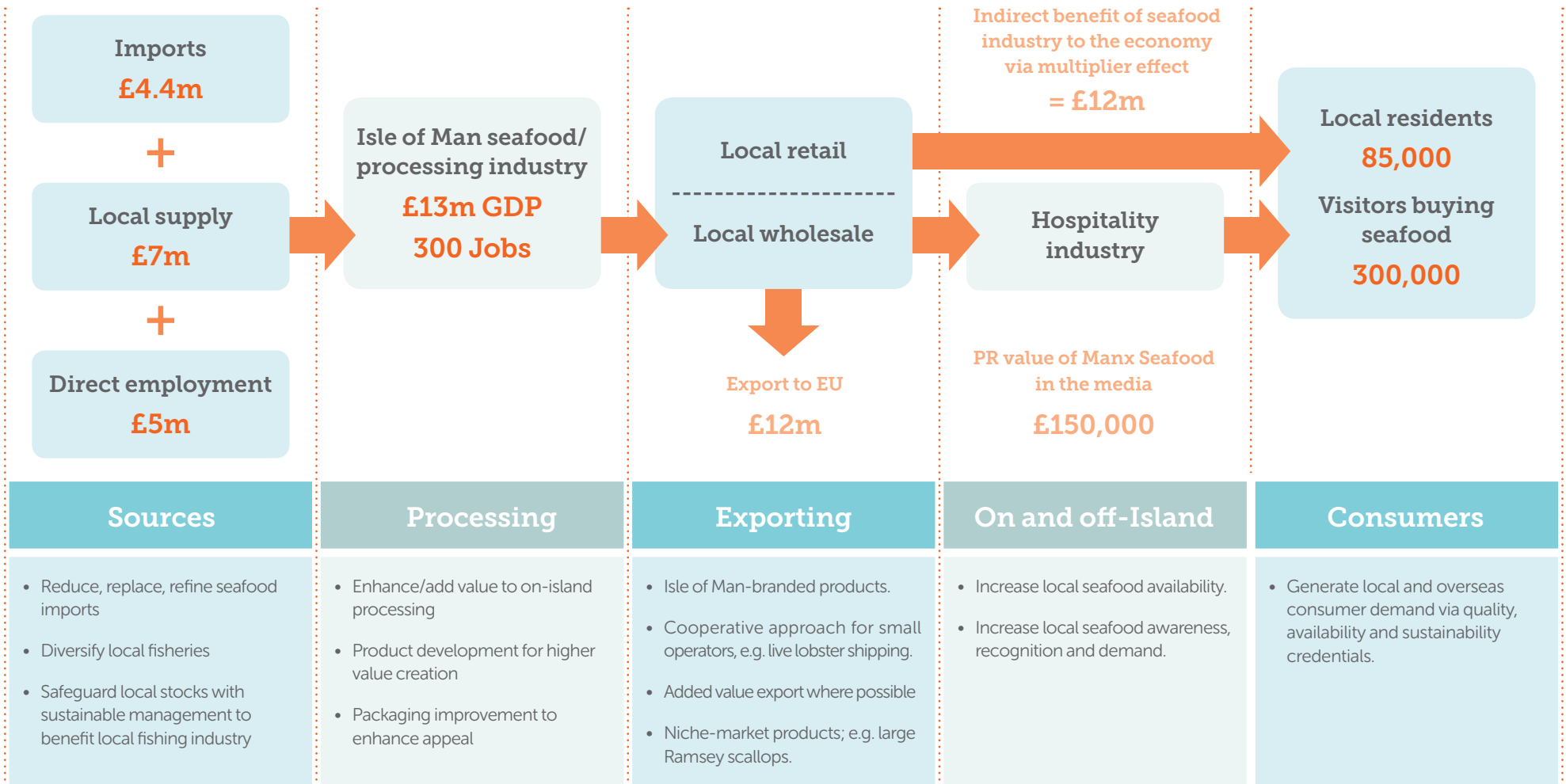
- Marketing
- Business development
- Investment

ADDING VALUE IN THE SUPPLY CHAIN

£1 = £1.83

Through the multiplier effect, £1 spent on local food on island can contribute £1.83 to our economy. Local restaurants serving local product also improve our quality of life, visitor experience and our Manx food and drink culture.

Estimated minimum value from marine resources, recreation, tourism and ecosystem services = £100m





Ramsey Bay Scallops: Making the most of a quality product

- Closed in 2009 due to low stocks, Ramsey Bay is now a marine nature reserve that includes a fisheries management zone.
- After 4 years without fishing scallops are 20% larger than outside.
- The fisheries area is co-managed by the Manx Fish Producers' Organisation and Manx Government, generating low-cost catches of very large scallops.
- In future, value-adding could generate a premium product valued at £11.50 per kg compared to £2.50 per kg for ordinary scallops.



OPPORTUNITIES: DID YOU KNOW?

- A live in-shell scallop can be worth 4 times more than shucked scallop meat. The value of a queen scallop in the half shell can be increased by 230% by packaging, and by 350% by adding herbs and butter.
- We currently have 6 inshore marine closed areas and 4 offshore for developing and protecting the future of our valuable seafood stocks.
- *Baie ny Carrickey* lobsters have a larger minimum landing size compared to everywhere else. Bigger lobsters produce more eggs for the future and are worth more money!
- We have very low bycatch in our fisheries but still discard 59t of 'waste' fish at sea every year. How can these fish be used or marketed in the future?
- Live Manx prawn (langoustine) caught in a creel is worth 3 times more than trawl caught. Creels also reduce the bycatch of juvenile fish!

NEXT STEPS

- Convene stakeholder working groups for implementation.
- Prioritise sea fisheries strategy aims and refine measures for success.
- Develop a detailed implementation plan to support the sea fisheries strategy key themes.
- Restructure and promote 'new' sea fisheries development funding opportunities.
- Consolidate seafood's role within the Food Matters Strategy aims.
- Engage industry with whole-of-Government to promote sea fisheries awareness and identify development opportunities.

Safeguard local stocks



www.wheretheyoucan.com/fooddrink



Identify new markets



Increase local and overseas demand



Diversify local fisheries

Value-add on-island with new products and packaging



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