

Respondents' Comments

The following are comments made by respondents on their questionnaires. These have been roughly sorted into general categories, but there is some overlap.

Stock Status, Discards and Quota

- ◆ Almost all species are caught easily, concerning the quota's some changes could be made.
- ◆ It is difficult for fishermen to have to discard so much cod, as the quota for cod is too small in comparison to the catches. Again biologists and policy officers are mistaken!
- ◆ What is happening with the sea bass stock??
- ◆ Whiting: no quota, need to discard everything.
- ◆ The EU is the main cause of the existence of discards (not of too small fish, but too large) of cod, whiting and skate. They should put their energy in adjusting the policy! The government should have their research vessel do more stock research of cod.
- ◆ I have been wondering for years how they collect their data. The fishermen need to discard way too much fish due to the quota problems.
- ◆ Cod catches are great, yet the quota is not sufficient. At the end of 2008 there was a lot of cod. We had to discard due to lack of quota. Sole catches are good, same picture as in 2008. A lot of small whiting, also at the end of 2008.
- ◆ They can say what they want, but the plaice stock gets better every time and the cod stock has also greatly improved.
- ◆ A lot of hake on grounds during summer months especially, resulting in massive discards
- ◆ Been a fisherman since 1987, but I have never seen so much fish (plaice) since starting at our fishing grounds. on the other hand, very poor fish prices.
- ◆ Generally more fish further north as fish in central north sea now seems very poor and has not recovered to what it was previously. Otherwise, there appears to be a lot of sandeels on the grounds providing feeding. The ban on EU sandeel boats in Norwegian waters has been a factor.
- ◆ Increasing amount of large halibut being seen.
- ◆ No real specific change in our area. there has been a slight increase in juvenile sole which is encouraging. on a negative note, though, we are seeing a reduced amount of cod.
- ◆ Quotas for cod, saithe and whiting do not match the abundance of fish on the grounds
- ◆ Sole fishery looks good for years to come. Lack of quota stops us targeting plaice. Levels of bass of all sizes in the fishery, there are so many they could eat us out of house and home. Stocks of Thornback ray are also increasing. The stock levels are not registered in the quotas. Possibly the most I have seen in 30 years, all sizes. Large shoals of mackerel in summer remain untouched due to lack of quota. Shoals of anchovies in the Thames. Most fishermen agree that the future looks very good, if we can stay the course.

Respondents' Comments

- ◆ Whiting, like usual on our local grounds but got to dump it due to not enough quota. Started dumping this year in January and still doing it today.
- ◆ We are fishing our quota in 5 days instead of 10 days
- ◆ Why is there not any megrim on this paper? we need massive increase in them next year, we dump more megs than cod!

Fishing Method

- ◆ The discard of plaice in the area where we fish plaice is almost non-existent, also because we fish with large mesh sizes of about 12 / 13 cm
- ◆ Sole: difficult to measure, we fish very spread out.
- ◆ We would like to fish with 10 cm but are forced to use 8cm. With respect to bycatch of cod; 30% cod. 12cm however is too wide to catch mullet. We get less with 12 cm. We have less days even though we have a cod and whiting document.
- ◆ If we don't take care, the flyshoot [seine net] will become the death of the fishers and fisheries.
- ◆ We find more fish; Beam trawl is not so bad. Adaptations on fish gear would be necessary to increase costs.
- ◆ I put don't know in abundance section, because I work 120 mm cod ends and they don't keep in small fish, very well.
- ◆ Working 120 mm cod-ends all the time so maybe don't get a true picture on discards.

Competition

- ◆ Cod can be caught easily, yet the price is low due to enormous illegal catches (e.g. of sport fishermen). Sea bass is difficult to catch this winter due to pair trawlers. Whole stocks are caught away in the Channel, and in springtime mostly by vessels from Arnhemuiden and Vlissingen.
- ◆ Cod: An awful amount is discarded, sport fishing should stop immediately.

Economic Situation

Including fuel prices, fish prices and in some cases catches

- ◆ Plaice catches are great, yet the value is low and does not weigh up to the costs (including the rent for the quota)
- ◆ Plaice: a lot of catch, yet the price has declined with 0.65.
- ◆ In 2008 the oil price was too high. In 2009 the fish price is too low.
- ◆ The catches are quite good. Yet the price does not look good.
- ◆ Foreign fish pushes Dutch fish off the market
- ◆ All vessels, large and small (300-2000HP) Monday morning 8 sale, Thursday afternoon 16 in the harbour without quota will be good for crew and stocks.
- ◆ Last year the oil was expensive, now the oil price is low but the prices for fish are very low. The plaice prices resemble those of before WWII. The traders make misuse of the situation, the consumers pay huge prices for fish, the consumers don't notice the low prices for fish.

Respondents' Comments

- ◆ The results of the plaice and sole stocks, following the practical knowledge of the fishermen, comes too late. On top of that, the systematic quota cuts have resulted in the situation that the product is priced out of the market by changing to alternatives.
- ◆ The economical circumstances become worse due to too expensive oil and too low prices for fish. The sea is full of fish, yet we have been cheated for years by the biologists with lies and tricks. Why don't you make use of the 600 million for a quick...
- ◆ I have been a fisher since 1987, but have never caught so much fish (plaice) as this year. Yet also the fish prices are extremely bad.
- ◆ The catches are not bad (very good in fact) but the fleet comes into trouble due to declining prices for fish. This is because the traders import cheap foreign low quality ('rotten trash') from china and Vietnam, puts it on the market and mixes it.
- ◆ Catches of plaice are extremely good, prices very bad. Foreign imports should be reduced, they kill the fleet.
- ◆ Catches of plaice are very good. The price level however is half of last years, so economically it is difficult. The cause: tilapia for better prices on the EU market.
- ◆ Taking the price for fish (low) and the price for oil (high) in consideration, I am very pessimistic for the future.
- ◆ Stocks are good. The problem is the unpractical bureaucracy, fuel prices and fish prices.
- ◆ A lot of fish, quota and fish prices are making the management nearly impossible
- ◆ having to hire in fish is killing the white fish boats and crews. plenty fish about as you see with the real-time closures. but this should include all boats fish in our sector not just Scottish boats
- ◆ I had to sell my old trawler because things were going the wrong way after two of the worst years I have experienced in 28 years. Very poor prawn fishing, poor salmon season and having to dump cod and whiting which were abundant at times. I've bought a coble now and am lobster and crab fishing and salmon netting and we will work a few gillnets in the winter.
- ◆ Nephrops fleet is in overcapacity. Prices are 35% lower than last year. The federations are doing nothing to help. The fleet is in financial meltdown and nobody cares
- ◆ Only fish plaice with 125 - 130 mm gear from Easter to September. More fish of all sizes (plaice) on grounds. have more operating costs, have more grossing due to landing more plaice but similar profits due to much poorer prices and higher costs.
- ◆ Prices are much too low. Fish traders are making between them agreements for prices
- ◆ We have invested very much to have a multi-purpose vessel, but we are anxious for the future.

Knowledge

- ◆ Trust the fishermen and do not trust the customers and traders. People on land don't understand nothing.

Management

- ◆ Fisheries Policy has failed. Better minimum size for all the fish and shellfish.

Respondents' Comments

- ◆ Sort out the problem of joint stocks of IV and VI (cod-monks)
- ◆ The 5 year plan has changed to 15. This is not good.
- ◆ Total mismanagement of inshore prawn grounds by allowing large multi-rig vessels to damage seabed and decimate fishery.

General

- ◆ Time has come for subsidies to end up at the right places, instead of disappearing to bureaucrats.
- ◆ There is an increasing amount of labels, and a decrease of prices. Innovation in fact means cheating in a 'respectable manner'.
- ◆ Less people should interfere with our business. All those clubs, foundations, committees and 'talk – groups' and ties...
- ◆ If this continues, there will be no fleet in 10 years time. Go to court and try to get rid of the fish consumer guide, all north sea stocks improve, so how can they still be in red? And try to do something about those imports.
- ◆ Have a seal cull. I have experience of this creature, the seal has spat at me, taken fish out of my nets, growled at me. Until I got seal nets from Norway and used them as outer walls in trammels. I would have folded.
- ◆ Taxes for imported fish! Fish abundance is better

General Remarks

This report presents the results of an analysis of the data collected through the Fishers' North Sea Stock Survey in 2009. Given the non-quantitative and subjective nature of this survey these results need to be interpreted and used with caution. Furthermore, given the constraints of time and resources it has not been possible to fully analyse or explore all of the possible permutations of fish species, areas, fishing gear, vessel sizes and nationalities.

One disadvantage of this form of survey is that it only provides information on perceived changes; it does not tell us anything about absolute levels. For example, it can tell us whether fishermen think their costs were higher or lower than last year, but not how high those costs actually are. For this reason, further caution is necessary in interpreting the results; a decline in the proportion of fishermen reporting high costs might look like a positive result, but if their costs remain very high those fishermen may still face economic difficulties.

Overall, the number of questionnaires returned in 2009 was significantly lower than in 2008. This decline was not equally distributed across all the participating countries, but particularly affected returns from Denmark, the Netherlands (exc. flag ships) and, especially, Scotland. The reasons for this decline are not known; in particular whether it is caused by declining faith in the value of the survey itself, or by some other factor. In the case of Scottish fishermen, it has been suggested that the poor rate of response reflects a more general (and increasing) disillusionment with the whole fisheries management process.

One effect of this uneven decline in the numbers of responses from different countries will have been to shift the balance of responses, certainly between areas and possibly between target species, fishing gears and vessel sizes. In particular, it has probably resulted in a greater proportion of responses from southern areas of the North Sea, and a smaller proportion from northern areas. A more detailed analysis of the data collected over the last few years would be necessary to investigate this point.

Overall, even taking into account the caveats mentioned above, the results of the survey in 2009 appear to be fairly positive. For all fish species the majority - and in most cases an increasing proportion - of fishermen reported higher abundances. Similarly, most fishermen reported catching all sizes of fish, and moderate or high levels of recruitment, for all species.

A high proportion of respondents also reported more discarding, with marked increases in the proportions reporting more discarding for some species. Although

General Remarks

the survey does not distinguish between discards of marketable and under-sized fish, these results appear to reflect a wider perception of a mismatch between quotas and the availability of fish, i.e. it is suspected that much of the reported discarding is of over-quota marketable fish, rather than of under-sized fish.

The fishermen's perceptions of economic circumstances in 2009 were more mixed, possibly reflecting differences between areas, fishing gears or vessel sizes. There were some indications that perceptions of economic circumstances tended to be least positive for larger vessels using towed gear in more northern areas.

Overall, the difficulty of getting or retaining crew does not appear to have got any worse, and costs have probably stayed the same or fallen. The latter may be partly explained by an easing of fuel costs after their peak in 2008 (as mentioned earlier, however, a disadvantage of the survey is that it does not indicate how high costs actually are). On the other hand, the majority of fishermen reported less profits in 2009, and less or the same level of optimism for the future. There is evidence that as well as continuing relatively high costs profits are being adversely affected by declines in market prices for many species.

One noticeable trend throughout the survey is that the results from the Kattegat (area 9), and to a lesser extent the Skagerrak (area 8), often differ markedly from the rest of the North Sea. The reasons for this difference are not known, but it may reflect differences in the types of fishing gear or fishing vessels used in these areas. Alternatively, it may reflect the fact that these areas lie in a zone of transition between the North Sea and the Baltic, and in particular the influence of the latter.

Appendix 1

Appendix 1

Sample Questionnaire Used in 2009

Appendix 1

2009 Survey of North Sea Stocks

The purpose of this questionnaire is to ensure that fishermen's knowledge of the state of fish stocks is considered during the development of TACs.

The questionnaire should be completed by **comparing conditions in January - June this year with conditions in January - June last year.**

All information will remain strictly confidential. Data will be pooled before presentation to the Advisory Committee on Fisheries Management. To ensure complete confidentiality please *do not* write your name, or the name of your vessel, on this questionnaire.

Instructions

1. The questionnaire refers to the **North Sea only**.
2. The questionnaire is in four sections that will help us use the data
 1. Vessel size and gear type
 2. Information on the eight main species
 3. Your financial status compared to last year
 4. Any other information you may wish us to know
3. Questions should be answered by putting a tick in the appropriate box (see example below).

| EXAMPLE | | |
|------------|----------|-------------------------------------|
| Question 1 | Answer 1 | <input checked="" type="checkbox"/> |
| | Answer 2 | <input type="checkbox"/> |
| | Answer 3 | <input type="checkbox"/> |

4. Please return your completed questionnaire to **[national coordinator]** by Friday 17th July 2009

Appendix 1

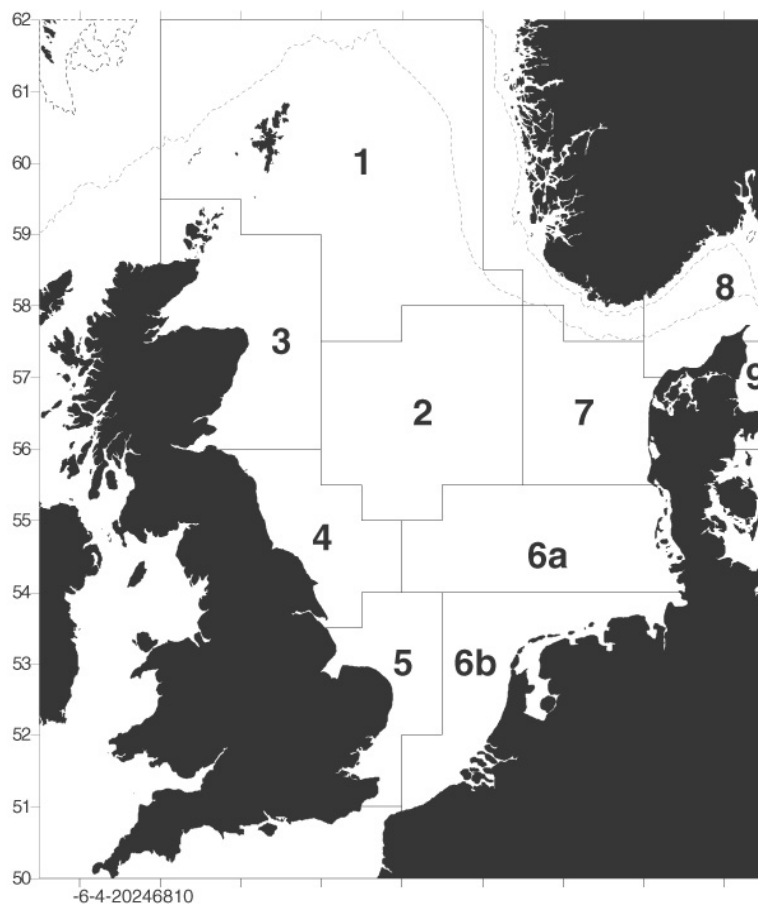
SECTION 1

| VESSEL & GEAR | | | | | | | | | |
|--------------------------------------|------------------------|--|----------------|--------|------------|--|----------|--|-------|
| Size | Under 15m | | | 15-24m | | | Over 24m | | |
| Main fishing method <i>last year</i> | Trawl | | Nephrops Trawl | | Beam Trawl | | Gill Net | | Seine |
| | Other (please specify) | | | | | | | | |
| Main fishing method <i>this year</i> | Trawl | | Nephrops Trawl | | Beam Trawl | | Gill Net | | Seine |
| | Other (please specify) | | | | | | | | |

SECTION 2

When completing the question on fishing area in this section, reference should be made to the numbered boxes on the map below.

Information on abundance should be provided on the basis of **catch** not landings



Appendix 1

| | | | | | | | | | |
|-----------------------------------|----|--|----|--|---|--|---|--|---|
| COD | | | | | | | | | |
| Area of fishing (refer to map) | 1 | | 2 | | 3 | | 4 | | 5 |
| | 6a | | 6b | | 7 | | 8 | | 9 |

Has the abundance of cod changed since last year? No Yes

If yes:

| | | | | | | | | |
|---------------------|-----------|--|------|--|------|--|-----------|--|
| Change in Abundance | Much less | | Less | | More | | Much more | |
|---------------------|-----------|--|------|--|------|--|-----------|--|

Has your level of cod discarding changed since last year? No Yes

If yes:

| | | | | | | | | |
|--------------------|-----------|--|------|--|------|--|-----------|--|
| Change in Discards | Much less | | Less | | More | | Much more | |
|--------------------|-----------|--|------|--|------|--|-----------|--|

For this year:

| | | | | | | | | | | |
|--|--------------|--|----------|--|-----------|--|------------|--|--------------|--|
| Size range | Mostly small | | | | All sizes | | | | Mostly large | |
| Abundance of young fish about to enter fishery | Low | | Moderate | | High | | Don't know | | | |

| | | | | | | | | | |
|-----------------------------------|----|--|----|--|---|--|---|--|---|
| HADDOCK | | | | | | | | | |
| Area of fishing (refer to map) | 1 | | 2 | | 3 | | 4 | | 5 |
| | 6a | | 6b | | 7 | | 8 | | 9 |

Has the abundance of haddock changed since last year? No Yes

If yes:

| | | | | | | | | |
|---------------------|-----------|--|------|--|------|--|-----------|--|
| Change in Abundance | Much less | | Less | | More | | Much more | |
|---------------------|-----------|--|------|--|------|--|-----------|--|

Has your level of haddock discarding changed since last year? No Yes

If yes:

| | | | | | | | | |
|--------------------|-----------|--|------|--|------|--|-----------|--|
| Change in Discards | Much less | | Less | | More | | Much more | |
|--------------------|-----------|--|------|--|------|--|-----------|--|

For this year:

| | | | | | | | | | | |
|--|--------------|--|----------|--|-----------|--|------------|--|--------------|--|
| Size range | Mostly small | | | | All sizes | | | | Mostly large | |
| Abundance of young fish about to enter fishery | Low | | Moderate | | High | | Don't know | | | |

Appendix 1

| | | | | | | | | | |
|---------------------------------------|----|--|----|--|---|--|---|--|---|
| WHITING | | | | | | | | | |
| <i>Area of fishing (refer to map)</i> | 1 | | 2 | | 3 | | 4 | | 5 |
| | 6a | | 6b | | 7 | | 8 | | 9 |

Has the abundance of whiting changed since last year? No Yes

If yes:

| | | | | | | | | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Abundance</i> | Much less | | Less | | More | | Much more | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|

Has your level of whiting discarding changed since last year? No Yes

If yes:

| | | | | | | | | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Discards</i> | Much less | | Less | | More | | Much more | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|

For this year:

| | | | | | | | | | | |
|---|--------------|--|--|----------|-----------|--|------|--|--------------|--|
| <i>Size range</i> | Mostly small | | | | All sizes | | | | Mostly large | |
| <i>Abundance of young fish about to enter fishery</i> | Low | | | Moderate | | | High | | Don't know | |

| | | | | | | | | | |
|---------------------------------------|----|--|----|--|---|--|---|--|---|
| SAITHE | | | | | | | | | |
| <i>Area of fishing (refer to map)</i> | 1 | | 2 | | 3 | | 4 | | 5 |
| | 6a | | 6b | | 7 | | 8 | | 9 |

Has the abundance of saithe changed since last year? No Yes

If yes:

| | | | | | | | | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Abundance</i> | Much less | | Less | | More | | Much more | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|

Has your level of saithe discarding changed since last year? No Yes

If yes:

| | | | | | | | | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Discards</i> | Much less | | Less | | More | | Much more | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|

For this year:

| | | | | | | | | | | |
|---|--------------|--|--|----------|-----------|--|------|--|--------------|--|
| <i>Size range</i> | Mostly small | | | | All sizes | | | | Mostly large | |
| <i>Abundance of young fish about to enter fishery</i> | Low | | | Moderate | | | High | | Don't know | |

Appendix 1

| | | | | | | | | | | |
|---------------------------------------|----|--|----|--|---|--|---|--|---|--|
| MONKFISH | | | | | | | | | | |
| <i>Area of fishing (refer to map)</i> | 1 | | 2 | | 3 | | 4 | | 5 | |
| | 6a | | 6b | | 7 | | 8 | | 9 | |

Has the abundance of monkfish changed since last year? No Yes

If yes:

| | | | | | | | | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Abundance</i> | Much less | | Less | | More | | Much more | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|

Has your level of monkfish discarding changed since last year? No Yes

If yes:

| | | | | | | | | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Discards</i> | Much less | | Less | | More | | Much more | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|

For this year:

| | | | | | | | | | | |
|---|--------------|--|----------|--|-----------|--|------------|--|--------------|--|
| <i>Size range</i> | Mostly small | | | | All sizes | | | | Mostly large | |
| <i>Abundance of young fish about to enter fishery</i> | Low | | Moderate | | High | | Don't know | | | |

| | | | | | | | | | | |
|---------------------------------------|----|--|----|--|---|--|---|--|---|--|
| NEPHROPS | | | | | | | | | | |
| <i>Area of fishing (refer to map)</i> | 1 | | 2 | | 3 | | 4 | | 5 | |
| | 6a | | 6b | | 7 | | 8 | | 9 | |

Has the abundance of Nephrops changed since last year? No Yes

If yes:

| | | | | | | | | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Abundance</i> | Much less | | Less | | More | | Much more | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|

Has your level of Nephrops discarding changed since last year? No Yes

If yes:

| | | | | | | | | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Discards</i> | Much less | | Less | | More | | Much more | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|

For this year:

| | | | | | | | | | | |
|---|--------------|--|----------|--|-----------|--|------------|--|--------------|--|
| <i>Size range</i> | Mostly small | | | | All sizes | | | | Mostly large | |
| <i>Abundance of young fish about to enter fishery</i> | Low | | Moderate | | High | | Don't know | | | |

Appendix 1

| COMMON (DOVER) SOLE | | | | | | | | | | |
|---------------------------------------|----|--|----|--|---|--|---|--|---|--|
| <i>Area of fishing (refer to map)</i> | 1 | | 2 | | 3 | | 4 | | 5 | |
| | 6a | | 6b | | 7 | | 8 | | 9 | |

Has the abundance of sole changed since last year? No Yes

If yes:

| | | | | | | | | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Abundance</i> | Much less | | Less | | More | | Much more | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|

Has your level of sole discarding changed since last year? No Yes

If yes:

| | | | | | | | | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Discards</i> | Much less | | Less | | More | | Much more | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|

For this year:

| | | | | | | | | | | |
|---|--------------|--|----------|--|-----------|--|------------|--|--------------|--|
| <i>Size range</i> | Mostly small | | | | All sizes | | | | Mostly large | |
| <i>Abundance of young fish about to enter fishery</i> | Low | | Moderate | | High | | Don't know | | | |

| PLAICE | | | | | | | | | | |
|---------------------------------------|----|--|----|--|---|--|---|--|---|--|
| <i>Area of fishing (refer to map)</i> | 1 | | 2 | | 3 | | 4 | | 5 | |
| | 6a | | 6b | | 7 | | 8 | | 9 | |

Has the abundance of plaice changed since last year? No Yes

If yes:

| | | | | | | | | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Abundance</i> | Much less | | Less | | More | | Much more | |
|----------------------------|-----------|--|------|--|------|--|-----------|--|

Has your level of plaice discarding changed since last year? No Yes

If yes:

| | | | | | | | | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|
| <i>Change in Discards</i> | Much less | | Less | | More | | Much more | |
|---------------------------|-----------|--|------|--|------|--|-----------|--|

For this year:

| | | | | | | | | | | |
|---|--------------|--|----------|--|-----------|--|------------|--|--------------|--|
| <i>Size range</i> | Mostly small | | | | All sizes | | | | Mostly large | |
| <i>Abundance of young fish about to enter fishery</i> | Low | | Moderate | | High | | Don't know | | | |

Appendix 1

SECTION 3

ECONOMIC CIRCUMSTANCES

Have your economic circumstances changed since last year?

| | | | | | | | | | | |
|--|-----------|--|------|--|------|--|------|--|-----------|--|
| <i>Difficulties in obtaining or retaining crew</i> | Much less | | Less | | Same | | More | | Much more | |
|--|-----------|--|------|--|------|--|------|--|-----------|--|

| | | | | | | | | | | |
|------------------------|-----------|--|------|--|------|--|------|--|-----------|--|
| <i>Operating costs</i> | Much less | | Less | | Same | | More | | Much more | |
|------------------------|-----------|--|------|--|------|--|------|--|-----------|--|

| | | | | | | | | | | |
|----------------|-----------|--|------|--|------|--|------|--|-----------|--|
| <i>Profits</i> | Much less | | Less | | Same | | More | | Much more | |
|----------------|-----------|--|------|--|------|--|------|--|-----------|--|

| | | | | | | | | | | |
|--|-----------|--|------|--|------|--|------|--|-----------|--|
| <i>Are you more or less optimistic about the future?</i> | Much less | | Less | | Same | | More | | Much more | |
|--|-----------|--|------|--|------|--|------|--|-----------|--|

SECTION 4

Have you any additional information on the fisheries?

Thank you for your contribution.

