

**Date:** Wednesday 16 May 2001  
**Time:** 2.00pm to 4.50pm  
**Venue:** Committee Room, National Assembly Building

## **FISHERIES - STUDY INTO INLAND AND SEA FISHERIES IN WALES**

### **Purpose**

1. To provide the Agriculture and Rural Development Committee with details of the public consultation exercise on the Nautilus Study into the potential of Inland and Sea Fisheries in Wales and to advise the Committee next steps for implementing the recommendations.

### **Recommendation**

2. That the Committee note the results of the public consultation exercise on the Nautilus Study into the potential of sea and inland fisheries in Wales.

### **Background**

3. In March last year the National Assembly for Wales commissioned a study to identify potential opportunities for the sustainable economic development of sea and inland fisheries in Wales. The intention was that the study would inform the Welsh Objective 1 and non-objective 1 fisheries programmes and would contribute to the co-ordinated socio-economic development of the coastal and rural Welsh economies.

4. The study was undertaken by Nautilus Consultants, following an open competition for the contract and the consultants presented their report to the National Assembly for Wales Agriculture and Rural Development Committee in September. The report's main recommendation was the formation of two spearhead committees to develop initiatives within the fishing industries, Sea Food Wales which would cover the marketing and processing etc of sea fish, Angling/ Fishing Wales which would cover fishing as a leisure/ tourism activity.

5. The Committee suggested that the report should go to public consultation and we distributed over 100 copies to a wide range of interests, seeking their comments. We received 32 responses and these are detailed at Annex B. A summary of the comments received are at Annex A.

### **Outcome**

6. The Nautilus Report secured general support across the whole of the inland and sea fisheries industries. The main criticism was that the Report had a number of factual inaccuracies, but most respondents acknowledged the enormity of the subject area and were generally content that the study correctly identified those areas with the greatest potential.

7. Most respondents also acknowledged that, as this was the first report of its kind undertaken in Wales, it was always going to be difficult to suggest definitive solutions and initiatives on how the industries should be supported. Respondents were therefore particularly supportive of the Report's suggestion for the formation of two committees, Seafood Wales and the Fishing Wales to spearhead future initiatives. I am pleased to report that the vast majority of the Study's recommendations, and other initiatives and recommendations suggested by consultees could be supported under the Objective 1 Single Programme Document.

8. In addition to the two spearhead projects the consultants also made specific comments on the need for Sea Fisheries Committees, Local Authority Committees that manage inshore fisheries, be adequately funded. This was generally supported by the respondents to the consultation exercise. The issue of SFC funding has been a thorny subject for many years. The Association of Sea Fisheries Committees has produced a paper entitled '2001 and Beyond' which amongst other things addresses this issue. The Association is consulting on their paper with the fishing industry and with the European Union and once they have the results of that consultation we have agreed to meet the Association to consider a way forward.

## **Finance**

9. The Nautilus Report proposes investment of about £70m comprising £55m under Objective 1, £5m under non-objective 1, including £10m R&D. The Objective 1 and non-objective 1 investment is made up of FIFG, EAGGF, ERDF and private sector monies and includes a public sector investment of 6% (£4m).

10. As envisaged the study, and the two spearhead committees now being suggested by the consultants, will inform the Objective 1 funded fisheries programmes and the measures proposed could be contained within the budgets as set out in the Single Programme Document. The public sector contribution to the £10m R&D investment could be met under an England and Wales budget held by the Ministry of Agriculture Fisheries and Food for fisheries research

11. We believe that the formation of the two spearhead committees can be contained within existing bids. Financial Planning has seen this advice and is content with the financial aspects.

## **Next Steps**

12. Subject to the views of the Committee, we will continue our discussions with agencies such as Welsh Development Agency, the Welsh Tourist Board and the Environment Agency for the

establishment of the two spearhead committees. We are also discussing with colleagues in the Welsh European Funding Office the possibility of utilising its Monitoring Committee structure, to take forward some of the development work. A report on progress will be made to the Committee in due course.

**Contact : Glyn Perryman  
APD2**

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## **Annex A**

The comments and recommendations from those who responded to the study are summarised below.

### **In supporting the study respondents to the consultation exercise;**

- Generally welcomed what was seen as a comprehensive study of the fishing industry in Wales.
- Applauded the Assembly for commissioning the study, which will facilitate decision making for the development of the coastal and rural economy under the Objective 1 structure funds
- Endorsed the findings of the report that there is potential within the sea and inland fisheries industry for growth.
- Supported the report's findings that angling and recreational fishing can play a major role in bringing tourists to Wales, generating additional revenue for the economy and creating employment.
- Commended recognition given to the importance of environmental awareness and the proposal that Wales should invest in habitat restoration, was welcomed.
- Supported the formation of two committees to spearhead initiatives within the Welsh fishing industries.

### **The principal comments made by the respondents against the findings of the report;**

- The short time scale to which Nautilus had to work have caused a number of factual inaccuracies, these have been acknowledged and fed into the process.
- There was concern that the fisheries sector may fall behind other sectors in determining and implementing its Objective 1 programme. Reassurance needs to be given that no loss will be borne by the sector of the first years Objective 1 funding. There are comments that fisheries development in Wales has lagged behind Ireland and Scotland.
- The impact of the 'black economy' on bona fide fishermen. Non-licenced and non-registered boat owners sell their fish 'cash in hand', which is depressing the price of legitimate fish. It was felt that the report did not effectively draw attention to measures of prevention and enforcement.
- There were conflicting ideas on the importance of the SFC's; some of the consultees felt that they effectively served fisheries in Wales and needed additional funding; others considered that they were no longer value for money and should be disbanded.
- The report has undervalued development potential for aquaculture, as it could surpass its current

contribution to the Welsh economy. Aquaculture should be able to respond to objective 1 funding with maximum effect.

- It was generally felt that improvement on the quality of fishing should be well advanced before fishing is promoted, as it was perceived that there is not enough fish for Welsh anglers. Many consultees pointed out that large stocking programmes should be initiated on many Welsh rivers to boost the income from visiting and local anglers.
- Fishermen were concerned that the report did not recognise the impact of seal predication.

**Annex B**

**COMMENTS RECEIVED ON THE STUDY INTO INLAND AND SEA FISHERIES IN WALES**

No	Name and Address	<u>Comments</u>	Ack Date
O1	O'Reilly Pat RFAC Ffoshelyg Lancych Boncath Pembs SA37 0LJ	<p><b>For</b></p> <p>1. 'Outstanding job, easy to read'. 'General conclusions, I strongly support'.</p> <p>2. The indirect job creation is more optimistic with indirect to direct employment ratio possibly 10:1 for angling in w.Wales and 4:1 in e. Wales.</p> <p>3. The proposal that Wales should invest in habitat restoration work is welcomed and the 'fisheries' justification is presented well.</p> <p>4. The jobs that are created/sustained in other branches of eco-tourism, habitat investment generally improve the environment and adds to the perceived scenic beauty.</p> <p><b>Against</b></p> <p>1. The short time-span given to bring about this report has led to numerical errors and wider consultation may have been beneficial.</p> <p>2. Game Angling economic value is understated and Coarse Angling overstated and uncertainty whether the fishing licences for trout was amalgamated under the Coarse heading.</p>	30/10/00

		<p>3. The target figure for job creation of 169 jobs is low and pessimistic.</p>	
02	<p>David Gardiner Project Leader Fisheries, Pembs County Council, Haverfordwest Pembrokeshire</p>	<p><b>For</b></p> <p>Welcomes the review of fisheries in Wales, and supports the recommendation of the two umbrella projects and strategy group. The report has an underpinning theme of sustainability and the need to ensure resource and the environment are protected. It recognises the high economic and social importance of recreational angling, and hi-lights the problems of low stock levels, unsustainable exploitation and lack of investment. Supports the proposal to establish the Aqua-Innovation Strategy Group. The report reflects the value of the Fishing in Wales Initiative which should continue to develop further.</p> <p><b>Against</b></p> <p>Many of the measures recommended for the commercial fishing sub-sector are either contrary to the provisions of the Objective 1 Programme complement or deal with secondary not primary issues.</p> <p>The report fails to address the following points:</p> <ol style="list-style-type: none"> <li>1. The option that Welsh fishermen could obtain financial assistance to buy quota to enable them to fish for certain species.</li> <li>2. The problem of competition and exploitation by non-regional vessels.</li> <li>3. Impact of "black economy" on bona fide fishermen. Measures of prevention/enforcement.</li> <li>4. Lack of investment in inshore sub-sector.</li> <li>5. Importance of SFC's. Why not single SFC for Wales, administered and funded by National Assembly for Wales, with jurisdiction out to 12 mile limit.</li> <li>6. Major development initiatives that are in discussion phase across Wales and within Pembrokeshire.</li> <li>7. Management of high seas Commercial Salmon Fisheries.</li> </ol>	30/10/00

8. Risk of loss to local economics of locally owned fisheries.
9. Potential in promoting fishing in Wales (tourism)
10. Sources of required match funding to come from angling sub-sector not identified.
11. Potential for creating employment through ghillie/fishing guide network ignored.

Generally it is felt that the report does not adequately highlight the following:

1. Insufficient recognition of resistance of Anglers and fishermen to involvement and change.
2. The amount of money from private sources is over-optimistic.
3. Many questions unanswered- Fisheries sector may fall behind other sectors in determining and implementing its Obj. 1 Prog. Reassurance needs to be given that no loss will be borne by the sector of the first years Obj. 1 funding.
4. Beliefs that the graph in fig 21 is inconsistent with the comments within the report.
5. Concentration on the reduction in fishing capacity forces fishermen out of the industry and fails to recognise that diversification of effort into other non pressure stocks could sustain both the stocks the fishermen and the industry.
6. Indigenous Welsh Fishermen would need substantial financial assistance to re-enter off shore sub-sector.
7. No figures given for quantum of fish sold through electronic auction at Milford Haven.
8. Does not reflect difficulties of catching sector obtaining reasonable first sale price.
9. Does not recognise concern by fishermen about impact of seal

		<p>preditation.</p> <p>10.No specific recommendations of future legislation of inshore sub-sector in Wales.</p> <p>11. Table 7.1 shows aquaculture as one of the highest risk and least important areas for the use of development resources in Wales and the suggestion that there has been no growth is not true. (10% year on year growth in some areas)</p> <p>13.Links between sport angling, agricultural diversification and env. enhancement not adequately highlighted.</p>	
03	<p>Huw P Hughes Secretary Seinot Gwyrfai and Llyfni Anglers Society, Gwynedd</p>	<p><b>For</b></p> <p>1. Approve of the recommendations outlined by the authors.</p> <p>2. The traditional attractions are loosing their appeal and substantial amounts of money is still being provided to them is failing to attract more visitors, so here is an opportunity to reallocate funding to develop an activity that cannot only but succeed.</p> <p><b>Against</b></p> <p>1. Page 41 highlights the value of game fishing to Wales is £8.16 million, he considers that this figure is an under estimation.</p> <p>2.To achieve customer satisfaction; the work to improve the quality of fishing should be well advanced before fishing is promoted, as customers will not return if the quality of fishing is poor.</p>	31/10/00
04	<p>Lyn Hughes Dan y bont Drefach Llanelli SA14 7AD</p>	<p><b>For</b></p> <p>1.APD did well to commission the study; they are to be congratulated.</p> <p>2 .The areas of sea angling, still water trout and coarse angling are getting better and there may be some scope for development.</p> <p><b>Against</b></p> <p>1.The preliminary consultation was inadequate.</p>	8/11/00

		<p>2.The study on the river Teify was questionable</p> <p>3.The E A openly admits that they are unable to maintain improve and develop fisheries for lack of resources.</p> <p>4.Game angling is on the edge of sustainability, development will represent a ‘policy folly’.</p> <p>5.The report is over optimistic, in that the product cannot be developed until it has been maintained and improved to a sustainable level.</p> <p>6.He perceives no point of inviting people to fish in Welsh waters when there is not enough fish for the Welsh anglers.</p> <p>7.Plans to improve facilities and information for game fishing for tourists in Wales are seriously misleading in the present situation.</p> <p>8.Increase grant aid to enable EA to improve and develop the game fishery should be the first step.</p>	
05	<p>Nica Pritchard  Nevern  Angling Ass  Spring Gardens  Parrog Road  Newport  Pembrokeshire</p>	<p>Short letter welcoming the Nautilus Report. Whilst there are areas in the document that are not agreed with, the production of the report is respected bearing in mind the time allocated to it’s presentation. She states the amount expenditure and investment the club has produced and its knock on effect to the rural economy of Wales.</p>	15/11/00
06	<p>Keith Allanson  Chairman  Local Fisheries  Advisory  Group  26 Glyn Aber  Park  Chester CH4  8LF</p>	<p><b>For</b></p> <p>1.The NAW are to be congratulated on the study and it will facilitate decision making for the development of the coastal and rural economy.</p> <p><b>Against</b></p> <p>1.The values in Table 1 (Ex Summary) need further study, it is possible that the small fisheries have been wrongly included in the coarse fishing section.</p> <p>2.Sustainability and permanence are not always differentiated properly. A small business which employ 10 people for 10yrs can</p>	13/11/00

still make a significant contribution to the economy of a rural village. It is important to take risks with investment, governmental as well as private, not demand that all supported developments have a long life span.

3.To boost the income from local and visiting anglers large stocking programmes should be initiated in many Welsh rivers.

4.The building of match platforms for anglers to use on the Western side of Bala lake could significantly contribute to the local B&B industry and if this scenario was set to other Welsh still waters the return of investment in the Welsh coarse fishery would be high and of low risk.

07	Robin Darker Ex Secretary Welsh Federation of Coarse Anglers Penceilogwydd Farm Penclacwydd Llanelli SA14 9SH	<p><b>For</b></p> <p>1.Welcomes the report and strongly recommends that a closer working relationship be established between all those who have an interest in the sport.</p> <p>2.Coarse angling in Wales can play a major role in bringing tourists to Wales generating additional revenue for the economy and generate employment.</p> <p>3.The report clearly identifies that there are too many interested parties to formulate a structured development plan, and should be overcome by forming a ‘Welsh Anglers Council’ involving different angling bodies along with the EA and the Tourist Board. Partnership should be the key word.</p> <p><b>Against</b></p> <p>1.With regard to Section 3.2 Coarse Angling. It should be made clear that there is only one Sporting Governing body for this in Wales and that is the Welsh Federation of Coarse Anglers Ltd. and not the Ass of Welsh Anglers as represented in the report.</p> <p>2.Lack of financial support prevents them from carrying out activities to the level that is expected, but nevertheless the federation has been responsible for the development and promotion of the sport and for setting standards in coaching, youth development and developing National and Regional Centres of Excellence in addition to the development of core club facilities.</p>	17/11/00
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3.The federation has been active in promoting angling and tourism in Wales largely at the expense of the officers and with little or no financial support from other sources.

4.The Sports Council for Wales must recognise the need for additional grant aid to support the governing bodies; activities carried out by the governing body must be funded from the core membership.

5.A small percentage of revenue generated from rod licence sales should be paid to angling governing bodies, this would aid the governing body of each discipline to effectively carry out additional work in developing sport throughout Wales.

08

Pat O Reilly  
Chairman  
Fisheries,  
Ecology and  
Recreation  
Advisory  
committee. E A

**For**

1.The committee welcomes the report in particular the need for twin track investment in Fisheries.

2.The FERAC congratulates the authors on the comprehensive study and supports its key recommendation that the NAW should invest in the aquatic and riparian environment of Wales.

**Against**

1.Several of the fisheries value figures appear to be incorrect, in particular the value of angling tourist visits to Wales, and the expenditure of anglers living in Wales has been overlooked in assessing angler numbers and expenditure, both make a significant contribution to employment.

2.The game angling sector is far greater than quoted in the report.

3.Trout fishing on lakes, reservoirs and rivers are excluded from the sector; this aspect of game angling has potential for further development particularly on stillwater fisheries.

4.The correction of figures referred above will greatly strengthen the case for public investment in the environment

5.The benefits of improving inland fisheries, via habitat restoration,

15/11/00

		<p>will be a key factor influencing inward and commercial investment decisions.</p> <p>6.Improved habitat will be achievable only with a substantial public contribution; the NAW should address this issue with urgency.</p>	
09	<p>Alan Bailey Criccieth &amp; District Angling Ass Pen Y Maes Caernarfon Rd Gwynedd</p>	<p><b>For</b></p> <ol style="list-style-type: none"> <li>1. Agrees with the findings of report and it points the way forward.</li> <li>2. The report suggests that the future is hopeful and correct investment will see an increase in fish stocks and hence an increase in revenue</li> </ol> <p><b>Against</b></p> <ol style="list-style-type: none"> <li>1.In Table 1 the figures for game angling do not compare favorably against coarse fishing.</li> <li>2.Replenishment of stocks should be vital.</li> <li>3.Salmon &amp; sea trout would benefit from higher investment in river management</li> <li>4.Further investment is needed in improving the product.</li> </ol>	27/11/00
10	<p>Richard White South West Angling Federation Blaen Nos Henllan Amgoed Carms</p>	<p><b>For</b></p> <p>Welcomes the emphasis placed on angling as an important factor in the rural economy of Wales.</p> <p><b>Against</b></p> <p>None</p>	27/11/00

11	<p>Gerald Banfield Parkview The Tramway Burry Port</p>	<p><b>For</b></p> <p>1.Surprised and pleased at the depth and understanding the report showed.</p> <p>2.The possibility of grant assistance for legitimate inshore fishermen will be of assistance to legitimate inshore fishermen.</p> <p><b>Against</b></p> <p>1.As a licenced fisherman and registered boat owner, he finds himself fishing against non licenced and non registered boat owners who sell their fish "cash in hand" at the same price as he sells his legitimately.</p> <p>2.This fish is depressing the price of legitimate fish</p> <p>3.He is angered and frustrated at this situation, especially when MAFF and SWSFC do nothing about this situation and he thinks that a bag limit on bass and a clamp down on buyers may help</p>	27/11/00
12	<p>Roger Thomas Environment Agency Wales Rivers House St Mellons</p>	<p>This a very detailed response. These are the main principles the detailed comments are on file</p> <p><b>For</b></p> <p>1.The E A strongly support the dual thrust of the report which urges fishery development and promotion linked to a programme of investment in aquatic and riparian habitats.</p> <p>2.The EA congratulate Nautilus Consultants on clearly emphasising that this dual investment is crucial to the sustainability of fisheries and the jobs that will be created and safeguarded through the proposed initiatives.</p> <p>3.The EA fully support the sustainability principles on which the Nautilus proposals are based and agree with the recommendations.</p> <p>4The EA recognise that with diligent needs, risks, and cost assessment the Objective 1 prog can bring sustainable environmental improvements and are key to long term economic benefits to communities in Wales.</p>	27/11/00

## **Against**

1.The short time-scale to which Nautilus had to work have caused misinterpreted data in some areas; the EA are highlighting these areas to provide their own interpretation and hope they will be of value to the NAW, none of these points will invalidate the main conclusions of the report.

2.Recommendations 189,190,191 have a direct bearing on issues raised and recommendations made in the Nautilus Report, the EA think it would be helpful to the NAW to repeat, here, the EA's response the three recommendations and to provide an update on progress in Wales.

3.The development of a major All-Wales fisheries programme will place high demand on the EA's limited resources and would require additional funding.

4.Page 2 Ex Summary makes ref to 'Salmon netting licences are in the process of being retired by the EA', this is an error and the EA would like to make it clear that the only licences being retired are those covered by 'reducing' net limitation orders.

5.There is need for clear guidance as to the type of scheme that will be funded, time scales involved and level of funding available.

6.The requirement for match funding from private interests and angling clubs in particular who, on a voluntary basis, are already committing their resources for the benefit if Wales and do not have readily available match funding.

13	E I S Rees Carreg Y Gad Anglesey LL61 5JH	<p><b>For</b></p> <p>The Report is welcomed as a perceptive study.</p> <p><b>Against</b></p> <p>1.Owing to the limited time the relevant information is limited and there are a number of factual errors, however these errors do not distort the thrust of the report.</p> <p>2.With regard to median lines Wales would be responsible for about 34% of the Irish Sea and it takes a disproportionately small part of the landings from ICES VIIa.</p> <p>3.With reduced fishing in the Irish Sea stocks of several fin fish could build back up from the present over fished state.</p> <p>4.Owing to the Hague preference arrangements and oceanic features in the Irish Sea, more benefit would accrue to Ireland &amp; N Ireland rather than Wales.</p> <p>5.The consultants were clearly in a quandary as to how to treat quota seeking flag vessels, foreign vessels make a significant contribution to keeping the port infrastructure in place.</p> <p>6.The dry dock facilities in the Welsh and Irish Sea area for med sized vessels are inadequate.</p> <p>7.Scope exists for diversification of bivalve molluscs and money should be made available for this, several species in Welsh waters are marketable on the continent and are at present being taken by Irish fishermen.</p> <p>8.Wales needs a research laboratory or ways need to be found for making better use of the expertise that already exists; the new research vessel entering service next summer could support fisheries science in Wales.</p> <p>9.If Obj 1 money is granted to support lobster hatchery it should be noted that the water quality, only room for one in Wales and consideration of release sites should be weighed up.</p>	30/11
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14	Mr E Lloyd FERAC member 5 Derw Rd Pontardawe Swansea SA8 4AN	<p><b>For</b></p> <p>1.Endorsed the findings of the report.</p> <p>2. Fisheries provide an important amenity to the industrialised valleys, which enhances the quality of life for the inhabitants.</p> <p>3.First class fishing is an important amenity factor which should promote inward investment in the valleys.</p>	12/12
15	Andrew Wilson Deeplock Ltd Bwthyn y mor Llanfaethlu Holyhead LL65 4HD	<p><b>For</b></p> <p>1.This is a comprehensive report.</p> <p>2.Page88 refers to ‘encouraging a focus away from exclusive environmental conservation towards sustainable exploitation’, this needs to be taken on board if the potential for new species are to be developed.</p> <p><b>Against</b></p> <p>1.There is a lack of strategic focus towards the inshore and Aquaculture sectors.</p> <p>2.The SFC MAFF EA CCW are reactive, negative and seen as policing authorities.</p> <p>3.The NAW should follow the Irish example where the BIM is very proactive and the inshore and aquaculture fisheries are progressing in leaps and bounds.</p> <p>4.The cost projections in the report are too high and should be abandoned.</p> <p>5. Facilitation should be taken into consideration rather than grant aid.</p>	12/12

16	David Fletcher Penlon Maes Y Llan Llandwrog Gwynedd	<p><b>Against</b></p> <p>1. Page 67-69 this makes reference to areas where the public should have cause for concern regarding the development of intensive land based aquaculture using recirculation technology, the relevance of these points should be carefully considered.</p> <p>2. Page 70 Section 4.5.2, this statement presents a limited impression of the real situation. Data can be supplied from recirculation operators and research institutes worldwide which demonstrate the economic and technical viability of marine and freshwater systems.</p> <p>3. The suggestion that funds should be targeted at resolving the reproductive techniques of the eel requires careful consideration.</p> <p>4. Mention of the potential for ornamental fish culture in Wales (P94). The area for development should be the production of marine ornamental fish., the market value exceeds that of all other species.</p>	27/11
17	Richard Williams Federation of Clwyd Angling Clubs Treloen Pool Park Ruthin Denbighshire	<p>1. Welcome the report.</p> <p>2. There is a healthy sea trout fishery with the highest average sized fish in UK and their experience on the river Clwyd shows that investment pays dividends.</p> <p>3. They bought out the commercial netting interests on the river resulting in an increase in numbers and size of the fish entering the system.</p> <p>4. The EA calculate the Clwyd fishery is worth £500,000 per annum to the local economy.</p> <p>5. The Clwyd fishery hope that these points will be taken into consideration when decisions are being made regarding funding of Welsh fisheries.</p>	12/12

18	<p>Jon Munro Wales Tourist Board Brunel House 2 Fitzalan Rd Cardiff</p>	<p><b>For</b></p> <p>In the short time the Nautilus consultants have come up with a very comprehensive analysis of the fisheries sector, and the WTB strongly supports the development and promotion of angling and recreational fishing as suggested in the report.</p> <p><b>Against</b></p> <p>This a very detailed response. These are the main principles the detailed comments are on file</p> <p>1.The WTB would like to see some further work that investigates the recreational fishing sector from the tourism perspective, a programme of research needs to identify key market segments and the potential that exists within these markets.</p> <p>2.Development of the tourist sector must be market led and based on the needs and interests of the visitor.</p> <p>3.A programme of research needs to identify key market segments and the potential that exists within these markets; a detailed understanding of the tourism market for recreational fishing will provide a clear well informed strategy that, works at ground level.</p>	13/12
19	<p>Seafish Development Aquaculture Sea fish Ind Auth Marine Farming Unit Ardtoe Acharacle Argyle</p>	<p><b>For</b></p> <p>1.The report serves to identify potential opportunities for the marine cultivation sector within Wales.</p> <p><b>Against</b></p> <p>1.The development potential of the shellfish aquaculture sector has been grossly under-ranked(table7.1), the judgement for ranking for shellfish should be revisited.</p> <p>2.The sentence that finishes with ‘little scope for mariculture development in Wales’(Para 5 on p59 4.1) is quite damning since technical advances occur in any industry and can change the status quo.</p> <p>3.P70 doubts are raised about the economics of finfish aquaculture in</p>	2/1

recirculation systems, there is considerable information from other countries that they can be viable given an appropriate production species.

4. There is likely to be a great deal of potential for increasing cockle production; and the Pacific oyster is grown commercially in Wales, there is scope for other species.

5. SWOT analysis (p66) – the strength for shellfish production in Wales is that it is an EU approved disease free zone; it has good transport links; high quality product; new technology could remove constraint of lack of suitable sites; N Wales mussel culture is limited to seed supply and not by carrying capacity.

6. There is little reference to the potential for lobster stock enhancement/ranching through restocking with hatchery-reared juveniles.

7. As stated in 7.4 funding will be crucial to development, drawing up a list of priorities will not be easy and further discussion should be encouraged to do this.

### **Factual corrections**

1. (P.61), the palourde (*tapes decussatus*) is a native clam; the Japanese abalone (*hailiotis discus*) has not been introduced to England or Wales for experimentation only to southern Ireland.

2. (P69), under chemical discharge it should say that ‘mussel beds are not treated with any chemicals’ to remove any suggestion that chemicals are used.

3. (P74), para 6 should read NorthWestern & North Wales SFC.

20	<p>B C Williams 7 Heol y Fedwen Tonteg Nr Pontypridd</p>	<p><b>Against</b></p> <p>1.He disputes the number of charter boats in Wales shown as 294 (P47) his estimate is that there are no more than 70.</p> <p>2.The private boat angling grossly underestimates the number of persons involved the number of craft and their value.</p> <p>3. The figures quoted in the report for persons involved in private boat angling (P49) are extremely underestimated, and their contribution to the economy is substantial.</p> <p>4.The value of the tackle trade is another substantial contribution to the economy.</p> <p>5.There are a number of boat owners who use nets to catch fish for sale(esp.bass) and are not registered, the current legal system allows for these abuses and is unfair to the honest fishermen; a fish limit may be more easily enforceable.</p> <p>6.The report mentions many times that the lack of proper and adequate funding for the SFC should be catered for. The SWSFC has been struggling since 1996 and no one takes their predicament seriously.</p>	22/12
21	<p>Mark Leathwood Pike Anglers Club 33 Sandfields Frodsham Cheshire WA6 6PT</p>	<p><b>Against</b></p> <p>1.(P.56 Introduction of non indigenous fish species) – The Pike Anglers Club will work to establish an environment in which pike are valued both as a sporting fish and as a necessary part of the management and ecology of fresh waters.</p> <p>2.(P.57 Use of live bait) The retention of the angler’s right to continue to use livebait as a legal method in the pursuit of predatory fish, is a matter on which PAC members feel strongly. The EA has given an undertaking to work with the PAC in encouraging the responsible use of section 30 for moving live baits between waters.</p>	13/12

**For**

1.The Council welcomes the Assembly’s decision to prepare the report.

2.The Council was directly involved with the Assembly and WDA in encouraging the new turbot farm at Penmon, and the NAW’s continuing support for this project is appreciated.

**Against**

1.Fisheries development in Wales has lagged behind Ireland and Scotland.

2.The NAW should recognise: the role of the coastal local Authorities who manage harbours, piers and other facilities; local agencies such as Menter Mon who are involved in promoting freshwater & marine angling and local seafood(via festivals).

3.WDA should be involved in the Seafood Wales initiative, and the Food Directorate involved in actively promoting Welsh seafood/ fisheries produces.

4.Fish processing/value-added activity and employment in Wales is low, NAW & WDA should pursue active encouragement of this.

5.The Univ of Wales School of Ocean Sciences should be encouraged to undertake activities likely to have positive economic spin-offs for the Welsh economy.

6.A lobster hatchery/ranching conservation programme should be given priority as a means of securing a sustainable fishery.

7.The role and funding of the Sea Fisheries Comm should be given careful consideration by the NAW and any specific proposals should be subject to further consultation with those affected eg coastal L A’s

8.The C. C. has been involved with Menter Mon in developing a proposal to fund an Anglesey Fisheries Development project via Obj 1 called Monaqua.This could possibly involve the appointment of a fisheries development officer, as Pembs now has, the strategy should allow for such local initiatives to take place within the overall all-

		Wales framework and objectives.	
23	Dr B Hogson 3 Selkirk Dv Curzon Pk Chester CH4 8AQ	<p><b>For</b></p> <p>1.The report highlights many areas where commercial expertise needs to be enhanced both in freshwater and sea water environment.</p> <p><b>Against</b></p> <p>1.A closer and stronger link between the EA and the SFC's is more desirable.</p> <p>2.Commercial fishermen's views should be taken into consideration with regard to conflicts with conservation.</p> <p>3.The development and exploitation of the shellfisheries around the coast particularly in SSSI's is one such area where improvements could be made if fisheries are promoted with one voice.</p> <p>3.Boundaries of SFC's if they are to be changed at all should retain the estuaries intact.</p> <p>4.The report doesn't mention encouraging closer liaison with angling clubs and organisations such as Environmental Trusts.</p> <p>5.There needs to be increased promotion of the National Angling events that are already being staged by organisations like the Welsh Salmon &amp; Trout Assc; the Institute of Fisheries Management should be involved in education and training of good management practice.</p> <p>6.He is concerned that there maybe too much emphasis on the "Welshness" of the report, Wales needs to benefit from all sources and there should be no perceived barriers or unnecessary parochialism.</p> <p>7.For angling venues there needs to be improvements in information that could attract increased interest in the location.</p> <p>8.Financing of research initiatives into areas that are going to provide an expansion of the fisheries economy should not be ignored.</p> <p>9.There is a need to forge links with businesses for sponsorship and</p>	2/1/00

		other means of financial support, fishing and environmental issues generally have a high public profile which companies usually like to be associated.	
24	Mr D R Hadley Holyhead Fishermans Fund 131 Treseifion Est Holyhead Anglesey	Mr Hadley's interest in the report is that he lost a family member by the way of drowning. He has since set up the ' Holyhead fishermens fund Lifering Location System' with sponsorship from local businesses and other fundraising efforts. He wishes to further this with lifering location systems around the whole of the Welsh coast and has requested funding; his letter has been forwarded to Delyth Davies, WEFO.	
25	Mr W E Thomas Chairman Saunderfoot Fishermans Assc Glen Tor Ragged Staff Stammers Road Saundersfoot Pembs SA69 9HZ	<p><b>For</b></p> <p>1.A comprehensive study of the fishing industry in Wales.</p> <p>2.(P13 unrecorded fishing) He agrees with the report as this is now a serious problem, in particular the Bass fishery, this puts pressure on law abiding tax paying commercial fishermen.</p> <p>3.(P.36 Harbour Development)This is exactly what Saundersfoot is proposing, develop a harbour for everyone, fisheries, anglers, yachts.</p> <p><b>Against</b></p> <p>1.Disappointed to discover that Saunderfoot does not appear and when the study was being researched no members of the association were contacted for information.</p> <p>2.(P.35 Sea Empress oil) He has seen no adverse effects from the Empress oil, the oil was dispersed by the use of detergents and what remained was broken down naturally by the sea.</p> <p>3.(P.35 Competition for food) As stated the greatest point of contention is the seal and is believed to be increasing by 20% annually and eat 10,000 tonnes annually, while fishermen took 1500 tonnes of whitefish last year and are now faced with a total ban on cod fishing, the CCW are now implementing new SAC's to protest the Grey Seal! How about the poor fisherman-who is going to protect him?</p> <p>4.(p.56 Shads and Lamphreys) These will now be protected by the</p>	2/1

		<p>SAC's</p> <p>5.(P77 Sea fisheries committees)It is the opinion of most fishermen that SFC's are no longer value for money and should be disbanded. The South Wales SFC has introduced byelaws which don't work, in particular no.10 the skate/ray, which discriminates against local Welsh fishermen giving advantages to other EU fishermen.</p>	
26	<p>Howard Roberts Welsh Salmon &amp; Trout Angling Assc Bellmullet Rhayader Powys LD6 5BY</p>	<p><b>For</b></p> <p>1.The assc welcome the Nautilus report and appreciate any measures to improve the Welsh fisheries and commend the NAW for its commitment to the angling charter.</p> <p><b>Against</b></p> <p>1.Recreational fisheries needs drive and initiative, these qualities are not forthcoming from the voluntary sector, and it is suggested that the EA could take the lead on this.</p> <p>2.The reinstatement of stock levels on main rivers must have a high priority if angling tourism is to be encouraged.</p> <p>3.The recovery of game fisheries requires a balanced approach and restoration of stock levels should go hand-in-hand with the increase of tourism.</p> <p>4.Improving stock levels draw heavily on the resources of the Agency and also the voluntary sector, which has been under funded for many years.</p> <p>5.The association notes the recommendations regarding aquaculture and would appreciate the potential of club fish rearing units. Such development could increase stock levels at minimum cost by maximising voluntary labour.</p> <p>6.Angling pressure can be reduced by encouraging 'put and take' fisheries or by introducing alternative species, such as grayling.</p> <p>7.The liming of acidified rivers has been proved efficient, and it is suggested that resourses be devoted to further research.</p>	2/2

8.WSTAA is responsible for teams in home, international, commonwealth and world level, this leaves a drain on resources, especially health & safety.

9.The WSTAA are involved in voluntary ventures and would be pleased to be associated with a professional approach.

10.The WSTAA are concerned that any measures to improve fisheries be self sustaining, but they would wish to point out the need for adequate bailiffing or policing.

27 Dr Tony Prater  
RSPB  
Sutherland  
House  
Cowbridge  
Road East  
Cardiff CF11  
9AB

**For**

1.Thanks the NAW for consulting with the RSPB on this report.

2.They found it very interesting and though provoking.

**Against**

1.The report does not treat all sectors the same way in identifying the value of the fishery, particularly the coastal and marine sectors. This is unfortunate in that it could lead to conclusions for targeting help that may be inappropriate.

2.The report has acknowledged that the ‘grey ‘economy exists which is substantial and unmeasured. This has several implications for developing sustainable fisheries where it is possible for an unsustainable practice is taking place alongside it. This should be considered further.

3.They support the principles of the bid identified in the introductory 2 para’s of 8.1, though the way they are interpreted does not always accord with them; in particular it should concentrate on quality not quantity; improve the management of coastal zone; fisheries operate sustainable within the capacities of the natural resources

4.Despite the world importance of seabirds of the welsh coast and their dependence on marine fish populations, the value of this interdependence is not mentioned in the report

5.There is concern that ‘environmentalists’ such as the RSPB are seen as a threat to fisheries.

2/1

6. Mari-culture has caused serious environmental problems in UK and the RSPB believe that this is not an appropriate technique to be developed in Wales.

7. Urgent review should be taken of the present regulatory, monitoring and research commissioning organisations for fisheries in Wales, this is needed before any of the suggested projects are developed.

8. The RSPB is concerned about the present EU funding programmes they are worried that the financial package proposed contains figures which are not substantiated in the supporting text.

28

Artie Jones  
Llandysul  
Angling  
Association  
Glas y Dorlan  
Llyn y fran Rd  
Llandysul

**For**

1. Welcomes the report and strongly supports its main conclusion that sport fisheries in W Wales have the potential to create and sustain many more jobs if there is investment in habitat and as the fisheries improve, high quality investment in marketing and promotion.

2. The Llandysul AA pledges its active support to the obj 1 prog.

**Against**

1. There is an error in the figures quoted for fishery values, game fisheries in particular have a much higher turnover than is stated.

2. The 170 new jobs suggested in the report is not supported by any argument justifying the figure, and he has evidence that over 1000 full-time jobs have been lost over the last 20 years.

3. Llandysul AA – 95% of visitor income goes to supporting local employment; 5% is spent locally; and 0% goes to those who do the voluntary work.

4. Compared to their figures 20yrs ago they are now 150 members short, their ticket sales are down a third, and the effect of this has been a reduction of tourist spending and the loss of at least 5 full time jobs.

5. A 30% increase in angling tourism is not an unrealistic med. term

2/1

		<p>target; Wales has much to lose if the decline of fisheries is not arrested.</p> <p>5.Many full time jobs are supported by angling tourists, sustaining these jobs will depend on the NAW taking decisive action to arrest the environmental decline affecting the performance of fisheries in Wales.</p>	
29	<p>Mr JD Fish North Western &amp; North Wales Sea Fisheries Comm Lancaster University Lancaster LA1 4YY</p>	<p><b>For</b></p> <p>1.It provides a useful overview of the state of the fishing industry in Wales at present.</p> <p>2.It identifies a wide range of measures that could help develop the industry.</p> <p>3.It recognises that a wide range of interests should be working closely together to help manage and develop the Welsh sea fisheries for the future.</p> <p>4.It is suggested that NAW and SFC’s should work more closely together to effectively develop the potential of sea fisheries, they would welcome the opportunity to forge closer links with the NAW to achieve this.</p> <p><b>Against</b></p> <p>1.It makes frequent references to the landings by ‘illegal’, ‘unlicensed’ and ‘unregistered’ vessels. The SFC’s are not responsible for licensing and registration of the vessels. The report does not present evidence to support the alleged illegalities, such references may, regrettably, alienate the industry from the report and it’s proposals.</p> <p>2.It is suggested that the NW&amp;NWSFC have difficulties managing fisheries in Wales because of its interests in England. This is <u>not</u> the case, as they implement a number of fisheries conservation measures that are specifically intended to benefit Welsh fisheries. The SFC boundaries in Wales do not inhibit dialogue between fisherman’s associations, nor do they adversely affect the industry. He states that the NW &amp; NWSFC have effectively served fisheries in Wales.</p>	22/12

30	Michael Wilkins Pembs Fisheries Development Assc Rosewood Tiers Cross Haverfordwest SA62 3EE	Mr Wilkins has written about the PFDA's involvement in shell fishery development work. Their aims have been the identification and development of fisheries for largely un-exploited stocks of burrowing bivalves.  His comments on the report are the same as the comments sent in by David Gardiner, Pembs CC, please see item number 2 on this table.  -	2/1  by email
31	P J Coates South Wales Sea Fisheries Comm Queens Blds Cambrian Place Swansea	<b>For</b>  1.The Committee greatly welcomes the report, which for the first time, provides an overview of the fisheries and their management in Wales, the committee have long suggested the need for such an independent valuation.  2.The are pleased that one of the overriding conclusions is to verify and support the role of the Sea Fisheries Committees as local managers of inshore waters, and protectors of the marine environment.  3.The report is a commendable piece of work in consideration of the finances and timescale.  4. The report identifies a significant contribution of fisheries related industries to the Welsh economy, maximisation of this would be a tremendous challenge and great opportunities exist in the mid to long term.  <b>Against</b>  1.The committee has identified a number of shortcomings and points for further study research and debate.  2.The study underestimates the current economic value of inshore fisheries in Wales, by way of direct benefits and indirect benefits (e. g. to sea angling).  3.The act of providing for coastal waters which are capable of	8/12  22/12

supporting healthy stocks of fish and shellfish and also provide a range of benefits for other users which the whole of the Welsh economy can benefit – It is recommended that further research is undertaken into the estimation of the contribution made to the Welsh economy of all angling activities, and validation of the methods used and assumptions made.

4.The study suggests coastal fisheries and sea angling contribute £37m per annum to the Welsh economy, is an underestimation as their figures suggest £75.6m-£112.3m may be more precise.

5.The contribution to the economy from the fisheries inshore sector (inc aquaculture)can surpass its current contribution if it were to have more effective management.

6.They look forward to the views of the NAW on how a planned rehabilitation/development programme can be implemented on a specific species/area basis. The benefits of such would amount to ‘sustainable development’, which would benefit many far beyond the coast of Wales.

7.Their independent analysis shows that figures for turnover, and thus employment are undervalued. Inshore fishing –50-84%, recreational sea angling –60 – 145%, visiting anglers 90%.

8. There needs to be changes within a number of organisations and development of long term plans; changes to organisational structures and responsibilities together with primary legislation, and changes to the Common fisheries Policy. Sectorial developments should take place in current structures and within the NAW responsibility and secondary legislation.

9.The NAW should be forward thinking and have a strategic approach; it should accept short-term losses for longer-term benefits, which could be supported by structural funds.

10.Aquaculture and fresh water fisheries should be able to respond to obj 1 to maximum effect, however the marine sector may be too complex to be turned around within the Obj 1 timetable.

11They suggest the formation of working groups of interested parties to further studies in research and development, using Obj 1 funds as

appropriate.

32

Dr Malcolm  
Smith  
Senior Director  
CCW  
Plas Penrhos  
Ffordd Penrhos  
Bangor  
Gwynedd  
LL57 2LQ

**For**

1.The report is well structured and relatively easy to find one’s way around.

2.The CCW welcomes the recognition that is given within the report for the importance of high environmental quality and the positive proposals made to secure high quality.

3.Welcome the acknowledgement that gains would be achieved through targeting resources at ‘better management of coastal zone resources(CZN) and more focussed on development of recreational fisheries’, the CCW will work within the NAW to ensure that this is achieved. They recommend that the NAW takes this forward.

4.Welcome the proposed initiative for promotion of environmental awareness education and training.

**Against**

1.CCW consider the report is limited to reviewing the current state and developmental potential of fisheries in Wales, at a time when there will be opportunities for using structural funding to develop fisheries. They recognise the time scale was limited but consider the report needs considerable alteration, and a major overhaul before published (see page 4 CCW comments, for examples)

2.They are concerned that proposals might secure Obj 1 funding before the report is fully appraised, consequently nature conservation could be adversely affected. They wish to see environmental commitment and close involvement with NAW.

3.The E A should not take the lead on the proposed Fishing Wales Project (this point was detailed in the Salmon & Freshwater Fisheries review), where the CCW advised against giving the EA a duty to enhance the social value of fishing as a form of recreation.

4.The ‘Aqua Innovation ’ is a quality project and they hope that the WDA will get sufficient resources for this £70m investment.

5.Environmental issues are given minimal coverage and there are weaknesses in the presentation, which could be misleading.

6.Section 2 should be improved, as it sets a negative tone to the report. The ex summary should cover the relevant point without the need to launch into them at the start of the report.

7. The report needs to convey consideration for environmental sustainability, particularly commercial sea angling.

8.The report encourages unsustainable practices such as competitive fishing. There will be increase of pressure to coastal habitats by improving ease of access.

9.The report does not recognise that many of the proposals it contains (eg diversification, new fisheries, harbour and infrastructure developments), are within SAC's and SPA's.

10.Some of the statements in the report undermine the recognition of the relationship between fisheries and the environment, and suggest a superficial relationship between them.

11.The report implies that fisheries management/development will contribute to environmental gains, this is considered a misleading point.

12.The report places too much emphasis on illegal fishing (unlicenced); the evidence to substantiate this is anecdotal and should not be considered the same as cited evidence. It is wrong to suggest that all environmental problems are caused by the grey market. Fishing licenced or unlicenced can still have adverse effect on the environment.

13.The NAW should investigate and appraise unregulated fishing and its contribution to environmental damage.

14.In some areas of the report management issues are identified as weaknesses and other areas there are references to the adequacy of management, a more consistent line is required as this is confusing.

15.Effective fisheries management and marine environmental protection could benefit from a comprehensive review of the

statutory framework underpinning UK sea fisheries management.

16. CCW encourage the NAW to have an active interest in the management of European Fisheries. The health of off-shore fisheries will have knock on effects inshore, and declining offshore catches will increase pressure on inshore stocks, especially salmonoids.

17. The CCW wish to encourage the adoption of an ecosystem approach to fisheries management.

18. The CCW are concerned that the economic importance of sea fishing is overstated in the report, and it overestimates the importance of fisheries to the economy of Wales. They compare the significance of fisheries to tourism, which also depends on high quality environment.

19. The table in 7.1 needs to include an 'environment' score, and to examine the environmental risks.

20. In the Fishing Wales project, the CCW propose that environmental awareness/training should be linked with acquiring fishing licences to be used by young people.

21. The CCW is responsible for promoting access and enjoyment of the countryside, which covers recreational fishing.

22. The report should investigate in detail the incompatibility between the growing inshore commercial fishery and the growing recreational fishery; this should be completed.

23. The CCW are concerned about the promotion of aquaculture on inland waters, their use for conversion to commercial fisheries may not be sympathetic to the maintenance of their native biodiversity. CCW would like to see a regional strategy developed for the identification of sites that are not subject to intensive fisheries e.g. the introduction of non-native species; and would wish to be consulted on this.

24. CCW are concerned about the development of non-indigenous species culture. Monitoring to minimise escapes is suggested as a collaborative exercise between CEFAS and EA, the NAW's role as licence consenters is crucial.

25. It would have been helpful to have included a list of all consultees.