



## 2018 ICES Advice

ICES published its annual advice for the main pelagic stocks on September 29. This follows the publication of demersal and herring advice in June. The remaining advice, for Dublin Bay prawn and some other stocks, will issue on October 31.

North West herring continues with zero TAC but, as happened in 2016-2017, the EU has sanctioned a scientific quota for the purposes of data collection going towards a re-building plan.

**Mackerel:** ICES advises that when the MSY approach is applied, catches of mackerel should be no more than 550,948 tonnes. There has been a major adjustment to balance the incorrect advice issued last year resulting in a 53 per cent reduction on what is estimated to be caught in 2017. It is a 36 per cent reduction on the revised advice issued in January 2017 and a 42 per cent reduction on the original September advice of last year, which ICES subsequently withdrew.

**Western Horse Mackerel:** ICES advises that when the MSY approach is applied, catches of western horse mackerel should be no more than 117,070t in 2018, an increase on last year's advice. This is based on a new assessment (see Western Horse Mackerel Benchmark article, page three.)

**Atlanto-Scandian Herring:** ICES advises that when the MSY approach is applied, catches of Atlanto-Scandian herring should be no more than 546,472t in 2018. This is based on the long-term management plan. The advice itself is a decline of 32 per cent on what is estimated to be caught in 2017.

**Blue Whiting:** ICES advises that when the long-term management strategy agreed by the EU, Faroe Islands, Iceland and Norway is applied, catches in 2018 should not exceed 1,387,872t. This is an increase of three per cent from last year but the advice for 2018 is lower, by 11 per cent, than the likely catch in 2017.

**Boarfish:** The boarfish advice issued is for the years 2018 and 2019. The same advice is given for each year, being

21,830t, a reduction of 20 per cent. ICES will continue to provide biennial advice for this stock unless it is upgraded to a Category One assessment (currently Category Three), in which case annual advice would be provided.

**North Sea Horse Mackerel:** the advice for North Sea horse mackerel is also biennial and states that catches should be no more than 17,517t in each of the years 2018 and 2019.

**Coastal States Long Term Management Plan:** The Benchmark decided that the best way of approaching the evaluation of performance criteria was to update all the tables concerning the long-term period that were provided by ICES in its response on February 13, 2015 to the "EU, Norway and Faroe Islands request to ICES to evaluate a multi-annual management strategy for mackerel in the North East Atlantic," with and without a constraint in inter-annual TAC variation as indicated in point 4 of the request. The target fishing mortality values evaluated are in the range of 0.10 to 0.35. These were used in combination with  $B_{trigger}$  values in the range of 2–5 million tonnes, including  $MSY B_{trigger} = 2.57$  million tonnes. Two lower  $B_{trigger}$  values, 0.6 million tonnes and  $B_{lim} = 1.94$  million tonnes, were also included in the evaluation. The work in relation to producing the updated tables was done offline after the meeting and the results were forwarded to ADG.

ICES also advised changes to the fishing mortality reference points for mackerel.

## Very Useful Choke Mitigation Tool Developed for the Landing Obligation

The issue of choke species has been highlighted as the biggest single problem in implementing the landing obligation. Extensive work has been carried out by the Member States Regional Groups and the Advisory Councils on the key choke species and the potential solutions to reduce the risk of fisheries being closed as a result of these species.

On the basis of this work, the North Western Waters Advisory Council (NWWAC) has developed a Choke Mitigation tool (CMT) which potentially provides a means for the identification of choke situations for key stocks. Two expert workshops have been convened by the NWWAC and the NWW Member States Regional group in conjunction with the Commission to work through the different stocks in the Celtic Sea, West of Scotland and Irish Sea using the CMT. At the workshops the different stocks have been classified as having: a high risk of choking fisheries, where catches currently exceed the TAC and multiple Member States are impacted; a moderate risk, where overall catches are less than the TAC but some Member States have a significant deficit between catches and quotas; or low/no apparent risk, where there is no perceived risk of choking currently as catches are well below current quotas.

From this analysis many stocks have been found to not present significant issues, or the risk of choking can be reduced by using the existing tools available within the CFP. However, for a number of stocks residual choke issues have been identified that can only be addressed by policy changes or alternative measures over and above the existing tools.

In the Celtic Sea, haddock, skates and rays, whiting, sole and plaice have all been evaluated as being high risk choke species. These species potentially could close multiple fisheries in the Celtic Sea with significant economic impacts for the fishing industry. For Ireland the key ones are haddock, whiting and sole. Other stocks such as anglerfish, cod and hake are also potentially problematic for Ireland although the risk of choking can be

(Continued on page two)

# Underwater Television Survey of Nephrops in Porcupine Bank Yields Data for 2017

(Continued from page one)

reduced using the available tools and also through quota swapping.

In the Irish Sea, whiting is the main problem stock which has the potential to close the *Nephrops* and demersal fisheries in the Irish Sea early in the year. This would impact not only the Irish fleet but also vessels from Northern Ireland and Belgium. Cod, sole, and to a lesser extent haddock, are also seen as high risk choke species in the Irish Sea.

In the West of Scotland, cod is the key species with the highest risk of choking multiple fisheries including *Nephrops*, demersal and even pelagic fisheries. The current measures will not resolve the problem and the potential economic impacts are significant. Whiting is the other species identified as a high risk choke species in this sea basin with the Scottish *Nephrops* and Irish demersal fleets particularly impacted.

The issue of by-catches of demersal stocks in pelagic fisheries and by-catches of pelagic species in demersal species has also been highlighted as a problem not only in the north western waters but also in pelagic fisheries in other sea basins. This has been analysed in more detail by the Pelagic Advisory Council and specific examples of by-catches of demersal species include whiting by-catch in herring fisheries, and hake in the mackerel fishery have been identified as key choke issues. Specific examples of catches of pelagic species in demersal fisheries include horse mackerel/mackerel and boarfish in mixed demersal fisheries in Celtic Sea, North Sea and Bay of Biscay.

There are also a considerable number of stocks for which a particular Member State or a group of Member States have no quota. While Spain is the most impacted by this, the Netherlands, Belgium, France and Ireland, in a limited number of cases, are also affected. There is no immediate solution to these specific problems within the existing tools other than through quota swaps.

The findings of the results from the CMT analysis will be presented and discussed with the Commission, Member States and Advisory Council during a seminar on the landing obligation planned to be held on November 15 in Brussels. It is hoped the Commission will be able to provide the industry with some clarity on how they intend to solve the problems identified.

The prawn -- *Nephrops norvegicus* -- are common around the Irish coast occurring in geographically distinct, sandy/muddy areas where the sediment is suitable for them to construct their burrows. The *Nephrops* fishery in ICES sub-area 7 is extremely valuable, with 2016 landings worth in excess of €107 million at first sale. The *Nephrops* fishery on the Porcupine Bank takes place on a large area approximately 7,100 km<sup>2</sup> of complex muddy habitat at depths of between 330-570m. The fishery typically yields very large individual *Nephrops* that attain very high market prices relative to other fisheries around Ireland.

International landings from the fishery peaked in the early 1980s around 4,000 tonnes but have shown a declining trend since then with some fluctuations (ICES, 2017). Around 2009, the stock and landings declined significantly after a period of poor recruitment. The serious concerns about the sustainability of the fishery led to the introduction of a three-month closed area, as proposed by the fishing industry. Subsequently the European Commission also introduced a quota for the Porcupine Bank in 2010. Since then the stock has recovered and landings have increased. The total estimated landings in 2016 were 2,154t which were likely to be worth an estimated €16.7 million. The Irish vessels were the main participants in the fishery with around 35 vessels active in the fishery.

In 2012, the Marine Institute commenced an UWTV survey programme on the Porcupine Bank. This year, 2017, was the fifth survey in the series (no survey could be carried out in 2015) and took place from June 18-22 on the RV *Celtic Voyager*. The survey was multi-disciplinary in nature collecting UWTV, oceanographic and other ecosystem data. In total, 63 UWTV stations were successfully completed in a randomised grid of stations six nautical miles apart covering the full spatial extent of the stock. At each

station the UWTV sledge is deployed. Once stable on the seabed, the sled is towed at 0.8 knots for ten minutes. The video footage is reviewed independently by two trained scientists. They identify *Nephrops* burrows which have very characteristic shape and size. The average burrow density at each location is used to estimate a total abundance for the whole stock.

The final abundance estimate of 850 million burrows was 11 per cent lower than the 2016 estimate (see Figure One.) The densities were highest in the northern part of the ground. Two of the stations had the highest densities observed since the start of the surveys (Figure Two.) The 2017 survey results together with data on mean size in the catches, derived for landings by grade data provided by the Irish fishing industry, will be used by ICES to provide catch advice for the stock. The catch advice for 2018 is due to be released on October 31.

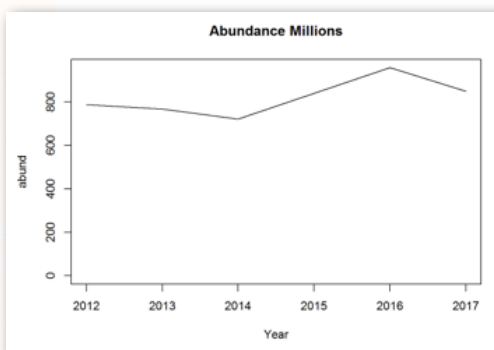


Figure 1 Total abundance of *Nephrops* estimated using underwater television surveys.

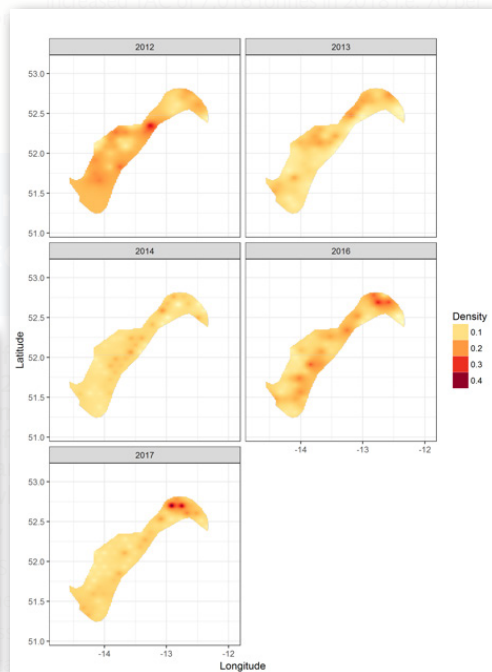


Figure 2 Porcupine Bank UWTV. Heat map of *Nephrops* burrow density observations.



Catch advice for the Western Horse Mackerel stock is based upon an assessment carried out during the annual WG WIDE meeting at ICES. In early 2017, the available data (catch, survey, species biology, stock definition) was reviewed and the assessment method and stock reference points were updated during the WK WIDE benchmark workshop.

Prior to the benchmark exercise the Western Horse Mackerel stock was assessed using a method that was specifically developed for the stock. Such an approach was necessary mainly because of the limited availability of fishery independent data (an index of egg production available only every third year) and the nature of the stock, in particular the occurrence of infrequent but very large year classes. Drawbacks with this approach included difficulty in incorporating alternative data sources (specifically fishery independent data), the need to make assumptions about the nature of the fishery which are unlikely to be appropriate given the dominance of individual year classes, and revisions of the stock size when a new egg survey data point became available.

During the benchmark, an alternative assessment model was proposed and accepted as a replacement for the previous assessment model. The new framework model (known as the Stock Synthesis or SS) is designed to be flexible and is

able to use a diversity of fishery and survey data including both age- and size-based data. SS is thus capable of considering data that the previous model could not easily do. This data includes an index of recruitment derived from groundfish surveys and information from acoustic surveys.

The flexibility of the SS model will allow for future development to consider additional survey data, and more detailed catch sampling information including the possibility of splitting the catch data into separate fleets. This may be appropriate given indications that catches in southern waters differ from those further north in terms of the size structure of the catch.

Meanwhile, the new assessment indicates a historic stock development similar to that from the previous model with current SSB the lowest in the time series. The stock reference points were also revised during the benchmark although their determination remains a significant challenge given the nature of the stock dynamics.

### Positive Outcome of Policy Review on Mackerel Allocations

**After many months of a damaging, negative, and often bitter campaign waged by the Irish South and West Fish Producers Organisation to have a substantial additional share of the national quota for mackerel allocated to the Polyvalent fleet, Minister Michael Creed, TD, finally restored certainty at the end of July.**

In recent years the mackerel quota was allocated among the Refrigerated Sea Water (RSW) Pelagic and Polyvalent sectors on an 87:13 per cent ratio. Going forward this share-out will be maintained when Ireland's mackerel quota, as finalised in the annual TAC and quota Regulation, is 90,000 tonnes or below. But if it should exceed this benchmark figure, then the amount of quota in excess of 90,000t will be taken off first and in full, and allocated on an 80:20 per cent basis. As can be seen from the mackerel advice for 2018 (page one) this scenario is very unlikely to happen any time soon.

The usual deductions, as required by EU Regulations, such as allowance for contingencies, swaps, carryover and the under 15m sector line-caught component, will not be part of establishing the 90,000t threshold, but all calculations following on the basis of the 87:13 per cent allocations will be made on those

adjustments being in place. In addition, a minimum of two per cent of the quota in the TAC and quota Regulation or 1,000 tonnes (whichever is the greater) will be deducted annually for demersal swaps before any share out between segments is undertaken. This amount is based on the level of such swaps in recent years.

The decision taken by Minister Creed is a result of many months of consideration of the issues; considerable input from all sectors of the fishing industry, and a public consultation process which generated 353 written responses. The fishermen affected by this issue, and particularly the RSW Pelagic sector, feel vindicated at the final outcome. While this was a worrying process to go through, they consider the Minister has based his decision on facts rather than fiction.

### New Market Advisory Council Links Fishing Sector with the Markets

**The Market Advisory Council (MAC) commenced in early 2017 but recent September meetings demonstrated the real work of linking the fish catching sector with the markets. The Advisory Councils such as the North-Western Waters Advisory Council (NWWAC) and the Pelagic Advisory Council (PelAC) were a product of the 2002 Common Fisheries Policy. In the new CFP (2014) the number of Advisory Councils (ACs) has been extended to a total of ten with the addition of an Aquaculture AC, an Outermost Regions AC and now, very importantly, the Market AC (MAC).**

The function of the MAC is to provide the European Commission and EU Member States with recommendations on matters relevant for the EU market of fishery and aquaculture products. The structure mirrors other ACs consisting of a General Assembly; an Executive Committee representing the value supply chain, environmental NGOs and

consumers; and three Working Groups, namely WG1 EU Production, WG2 EU Markets and WG3 EU Control, Sanitary Issues and Consumer Rules.

The remit of WG1 EU Production, chaired by Sean O'Donoghue, includes evaluation of first sale trends, impact of recovery plans on markets, implications of new technical measures, discard ban implementation and the promotion and competitiveness of products. At the September meeting WG1 held a session entitled "Production and Marketing Plans: Implementation and Challenges" where DG MARE, the member state representatives and the POs described their positions and difficulties regarding the implementation of PMPs. The outcome of the panel discussion was a proposal that the MAC would develop a Best Practice template for the operations of PMPs going forward. This important topic will be further addressed at the upcoming WG1 EU Production meeting on October 17 next.

In 2016 the Marine Institute instigated a new trawl survey series: the Irish Anglerfish and Megrim Survey and this work continued in 2017 with a trawl survey of the west and southwest continental shelf from February 14 to March 7, followed by a survey of the area north of Ireland and west of Scotland from April 8-17. The main objective of the survey is to obtain biomass estimates for anglerfish and establish an abundance index for megrim in ICES Areas 6a (south of 58°N) and 7 (west of 8°W). Secondary objectives are to collect data on the distribution and biology of anglerfish, megrim and other commercially exploited species.

Last year, Irish-registered vessels landed 4,400 tonnes of monkfish and 3,300 tonnes of megrim. These combined landings were worth more than €20 million at first sale, ranking them as the second and third most valuable demersal species (after *Nephrops*).

ICES provides scientific advice on fish stocks, which is used to set TACs. For many stocks this advice is based on information from commercial catches and surveys, but the catch advice for some monkfish and megrim stocks is based on very limited information and ICES classifies them as 'data-poor stocks'. For example: the advice for black monkfish in Areas 7 and 8 is based solely on the abundance trends in the French bottom trawl survey. That survey only covers part of the stock and the gear is not designed to catch monkfish.

The current Marine Institute survey employs a random stratified sample design based on water depth and commercial catch rates of the target species. Sampling stations were selected at random within each stratum, resulting in a pattern that was approximately evenly distributed. A tow track was then drawn through the randomly selected points. Specific details of the survey are available from Eoghan Kelly or Hans Gerritsen, Marine Institute.

Over the course of this year's survey, a total of 109 valid stations were completed. Density of white monkfish and megrim was highest in Area 6a continental slope area with 68 and 94 individuals per km<sup>2</sup>, while black monkfish was found in greatest numbers in Area 7 continental shelf area.

Preliminary results from 2016 and 2017 surveys suggest a small increase in biomass of white monkfish in Areas 6a and 7, but no sign of strong recruitment in 2017. Black monkfish biomass in Area 7 appears stable and abundance is greater than in Area 6. Recruitment of black monkfish is also better in Area 7 compared to Area 6. Further analysis of survey data is ongoing and the results from the new Irish survey series are expected to improve the assessment and advice for monkfish and megrim once the time-series is long enough to evaluate trends.

# Editorial



by Sean O'Donoghue

CHIEF EXECUTIVE, KFO



A major event in our calendar at this time of year is the release of the ICES advice for pelagic stocks. As usual, this year brings gains and losses but it is very important to remember that this advice is not the final word on fishing opportunities for 2018; nothing is finalised until after the Coastal States negotiations and the Fisheries Council meeting in December. Advice for mackerel has shown a huge drop but it is due to three main factors: (1) the correction needed following the incorrect ICES advice given in January this year; (2) the changes to the assessment due to the benchmark; and (3) the change in the fishing mortality. The increase in Western horse mackerel following the benchmarking exercise and a new assessment model was unexpected and is not in accordance with views in the industry. Other important species such as blue whiting are relatively stable but boarfish, despite the higher acoustic survey results than last year, is still classified as Category 3 and subject to a 20 per cent year-on-year reduction.

The possible fallout from Brexit continues to be a major concern, heightened by the

lack of detail on any progress between the negotiating parties. To ensure the vital interests of European coastal fishing communities are kept to the forefront in these negotiations, the representatives of such communities will issue a joint declaration calling on European decision makers to uphold the principle of reciprocity in trade relationships and make access to EU markets for UK seafood conditional on access to fishing grounds for EU fleets. This significant event will occur on the iconic date of October 23, 2017 in Santiago, Spain, exactly 30 years after the original Santiago de Compostela Declaration of 1987 which reminded all Europeans of their common heritage. We hope it will have the same positive outcome.

The Landings Obligation continues to cause problems and becomes more complicated as it develops. Choke species is the biggest single problem (see page one); the NWWAC and the NWW Member State Regional Group in conjunction with the Commission have put a huge effort into finding solutions to the

inevitable closure of fisheries if the choke species issue cannot be overcome. The development of the Choke Mitigation Tool has been a positive step in this regard and we look forward to the Commission taking a positive lead to resolve the matter as soon as possible.

Finally, after a prolonged, and unnecessary, period of uncertainty following the request from the Irish South and West Fish Producers Organisation to Minister Creed to review the allocation of mackerel quota in favour of the Polyvalent sector, the Minister agreed that the existing status would be maintained, except in those circumstances where the Irish quota exceeded 90,000 tonnes. It was a relief to finally have the issue resolved, and it does underline the legitimate position of the RSW Pelagic fleet, but it created unnecessary friction between groups within the Irish industry and was a waste of time and resources when all our efforts needed to be directed towards Brexit.

Another welcomed development has been the launch of the new Market Advisory Council (MAC). This is a new departure for an Advisory Council as it creates a direct link between the management of fisheries and market conditions.

Brown crab, a truly trans-national fishery in the NWWAC area, has had another successful meeting of its NWWAC Crab Focus Group. Previous meetings had identified lack of data as an obstacle in developing fishery management measures which would address regional and national requirements but not necessarily be a "one-size-fits-all" solution. On this occasion, the Focus Group explored a number of innovative, inexpensive systems which could be used by individual fishermen at all levels of the industry to collect data in an unobtrusive manner which would not impede the fishing operation but provide real-time, widespread data to their national scientific bodies who could, in turn, collaborate at an international level.

I would like to take this opportunity to thank all those who contributed to the information gathering and staging of the play "Shoot the Gear" which was a tribute to the fishing community of Killybegs from the earliest days to the present. I would particularly like to thank Guy Barriscale and his colleagues in An Grianán theatre and Donegal County Council.

## Important Dates October - December 2017

DATE	MEETINGS	VENUE
Oct 3rd	NPWG	The Hague
Oct 4th	PelAC WG1 & WG2	The Hague
Oct 5th	PelAC General Assembly & Executive Committee	The Hague
Oct 9-10th	Fisheries Council	Luxembourg
Oct 9-10th	West European Technologists Association (WEFTA)	Dublin (Aviva)
Oct 10-12th	Coastal States (Mackerel)	London
Oct 11th	EU Fisheries management after Brexit	Brussels EP
Oct 13th	Industry Science Partnership	Galway
Oct 16-18th	Coastal States Blue Whiting	London
Oct 17th	Markets Advisory Council EXCOM & WG1	Brussels
Oct 18th	Markets Advisory Council WG2 & WG3	Brussels
Oct 18-20th	Coastal States Atlanto-Scandia Herring	London
Oct 19-20th	LDAC WG4 & WG1	Brussels
Oct 20th	Industry Meeting Minister Creed	Clonakilty
Oct 23-27th	ICES Benchmark Irish Sea WKIrish4	Dun Láoghaire
Oct 23rd	Declaration by European Fishing Communities on Brexit	Santiago Spain
Nov 1st	Brexit Stakeholders Forum, Iveagh House	Dublin
Nov 6-7th	Fisheries Council	Brussels
Nov 8th	LDAC WG5	Brussels
Nov 13th	LDAC WG2	London
Nov 13-17th	NEAFC AGM	London
Nov 14th	Inter-AC Coordination Meeting	Brussels
Nov 15th	Landing Obligation Workshop	Brussels
Nov 21-22th	EU/Norway Bilateral first round	Norway TBC
Nov 27-Dec 1st	EU/Norway Bilateral second round	EU TBC
Nov 30th	SFPA Consultative Committee	M.I. (Oranmore)
Dec 4th	Foodwise Conference	Dublin (Croke Park)
Dec 5-6th	EU/Faroe negotiations	Faroe Islands
Dec 11-12th	Fisheries Council	Brussels

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