

Clyde Marine Region Topic Sheet Series

Economic activities in the Clyde Marine Region



Background

The Clyde Marine Planning Partnership (CMPP) has developed this set of Topic Sheets to help communicate the findings of the Clyde Marine Region Assessment which is available on our website www.clydemarineplan.scot. The Assessment is used to inform and prioritise the development of policies for the Clyde Marine Plan. If you would like to be kept up-to-date about the development of the marine plan please visit the website and sign up to receive our e-newsletter.

What economic activities did the Assessment cover?

The Productive section of the Assessment analysed key economic and spatial data within the Clyde Marine Region (CMR including: sea fisheries; aquaculture; sport, recreation and tourism; defence; and shipping and transport. The Assessment also looks at a range of topics such as historic environment and cultural heritage marine management, education and research and development, for which economic data was not available. Each chapter also considered the pressures and impacts on the environment created by each sector.

How was the data collected?

The economic contribution of the sectors includes employment, turnover and Gross Value Added. The data in the boxes below covers five years, however a longer 10 year period is also included in the Assessment.

The economic summaries should be treated with caution. There are differences in base years and comparison periods and not all figures were specific to the CMR. The two data collection areas are:

- Clyde Marine Region** – coastal communities that are likely to be directly impacted by activity within the Clyde.
- Wider CMR** – data by Council area. For most Councils the entire coastline sits within the CMR, however Argyll and Bute has a coastline which continues outside the CMR. Figures for turnover and GVA will therefore be inflated at the wider CMR level and cannot be directly compared with other data.

Other issues with the data include availability, problems with the ability to disaggregate the data and data suppression to protect confidentiality.

Sea fisheries

Sea fisheries include all commercial fishing activity in the inshore waters of the CMR - trawling, dredging, creeling and diving. The majority (85% of total value) of commercial activity within the Clyde is undertaken by smaller trawl vessels under 15 metres targeting *Nephrops*.

Sea Fisheries

| Indicator | Value 2013/14 | % of Scotland | Change 2010-14 |
|----------------------------------|---------------|---------------|----------------|
| Wider Clyde Marine Region | | | |
| Employment (nos.) | 600 | 16% | +24% |
| Turnover* | £36.2m | 11% | +14% |
| GVA* | £13.2m | 12% | -18% |
| Wider Clyde Marine Region | | | |
| Tonnage | 5,742 | 9% | -12% |
| Value of landings | £14.8m | 10.5% | +12% |
| Effort (kW days) | 23,500 | - | +6% |

*2009 – 2013 and adjusted to 2013 prices

Aquaculture

In the CMR there is a mixture of shellfish and finfish production sites, the majority is focussed on finfish production, mainly around Loch Fyne.

Aquaculture

| Indicator | Value 2013/14 | % of Scotland | Change 2010-14 | |
|----------------------------------|---------------------|----------------|----------------|------|
| Wider Clyde Marine Region | | | | |
| Employment (nos.) | 160 | 8% | -16% | |
| Turnover* | £30.1m | 11% | +21% | |
| GVA* | £11.5m | 10% | +51% | |
| Wider Clyde Marine Region | | | | |
| Tonnage | Mussels | 300 | 4% | 0%# |
| | Oyster and Scallops | 500,000 shells | 13% | -75% |
| | Salmon | 11,000 | 8% | +40% |
| Value-Salmon | £45m | | +44%* | |

* based on combined two year figures due to two year cycles in salmon harvesting. 2009 – 2013 and adjusted to 2013 prices.

using 2005 as a base year, as 2010 was a peak year that skews the assessment.

Processing – Fisheries and aquaculture

This sector is a key supply chain activity that supports fisheries and aquaculture. Primary processors are involved in gutting, filleting, shelling, packing, chilling etc. and secondary processors add value to fisheries products through cooking, canning, deboning or breeding, etc.

Processing – Fisheries and aquaculture

| Indicator | Value 2013/14 | % of Scotland | Change 2010-14 |
|----------------------------------|---------------|---------------|----------------|
| Wider Clyde Marine Region | | | |
| Turnover* | £175.7m | 11% | +46% |
| GVA* | £40.1m | 10% | +48% |
| Wider Clyde Marine Region | | | |
| Employment (nos.) | 440 | 5% | +60% |

*2009 – 2013 and adjusted to 2013 prices



THE MINISTRY OF DEFENCE IS THE LARGEST EMPLOYER IN THE CMR © J E DONNELLY

Defence

Ministry of Defence activities in the CMR are concentrated at Her Majesty's Naval base (HMNB) Faslane, which sits on the eastern shores of Gare Loch. The base is the largest single site employer in Scotland with 4,970 staff on site in 2015, down 9% on the period 2011-2015. There is also a Naval Armaments Depot located nearby at Coulport.

Shipping and Transport

Shipping and transport includes ferries, ships, cruise vessels and commercial freight operations, ship building (commercial and leisure), as well as dredging and dredge spoil. Many coastal towns in the CMR were established on the back of activity at the ports, and there are around 13 'lifeline' ferry services in the Clyde.

Sport, recreation and tourism

A wide range of water sports and activities take place in the region including diving, kayaking, rowing, surfing, sailing and power boating. This sector also includes a wide range of tourism activity including operators of marine facilities, accommodation and food and drink providers. Therefore please note, it is estimated that only between 10% and 50% can be attributed directly or indirectly to marine activity and that 50% of the turnover is attributable to the non-marine Glasgow Area.

Sport, recreation and tourism

| Indicator | Value 2013/14 | % of Scotland | Change 2010-14 |
|----------------------------------|---------------|---------------|----------------|
| Wider Clyde Marine Region | | | |
| Turnover* | £2bn | 30% | -19% |
| GVA* | £1bn | 29% | +0.3% |
| Wider Clyde Marine Region | | | |
| Employment (nos.) | 35,150 | 18% | +7% |

*2009 – 2013 and adjusted to 2013 prices

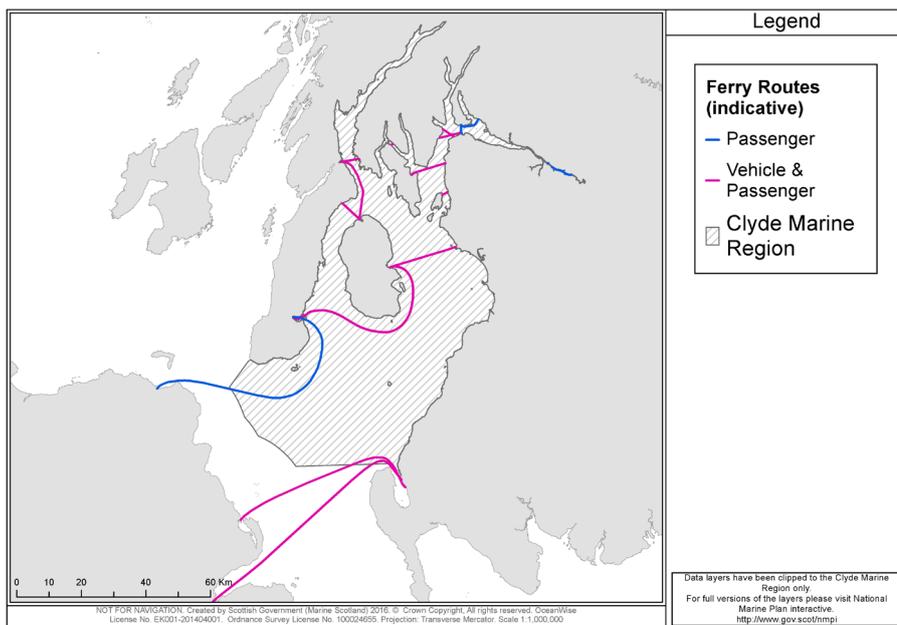
Shipping and transport

| Indicator | Value 2013/14 | % of Scotland | Change 2010-14 |
|---------------------------------------|---------------|---------------|----------------|
| Wider Clyde Marine Region | | | |
| Employment (nos.) | 4,750 | 32% | -10% |
| Turnover* | £1.08bn | 35% | -17% |
| GVA* | £314m | 27% | -23% |
| Wider Clyde Marine Region | | | |
| Freight tonnage | 16,300 | 24% | +23% |
| Freight ship calls | 3,485 | 18% | +41% |
| Cruise ship passengers (2012 to 2015) | 110,000 | 25% | +66% |
| Ferry passengers** | 4.1m | - | -12% |
| Ferry cars** | 1m | - | -11% |

*2009 – 2013 and adjusted to 2013 prices

Decline in passenger numbers driven by significant decline and change of service on subsidised Gourock to Dunoon route

Ferry routes in the Clyde Marine Region



FERRY SERVICES PROVIDE CRUCIAL LINKS ACROSS THE REGION © PETER SANDGROUND

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