

European Commission

Fish / 2006 / 09

Assessment of the status, development and diversification of fisheries-dependent communities

Grimsby Case study report

July 2010



Image (C) Associated British Ports



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Acronyms:

ABP	Association of British Ports
B_{lim}	Biomass limit, at which reproductive capacity of the stock may be impaired
B_{pa}	A precautionary biomass reference point
CEFAS	Centre for Environment, Fisheries and Aquaculture Science
CFP	Common Fisheries Policy
DEFRA	Department for Environment, Food and Rural Affairs
F	Fishing mortality
F_{pa}	A precautionary fishing mortality reference point
DWT	Deadweight tonnage
FIFG	Financial Instrument for Fisheries Guidance
GVA	Gross Value Added
HIS	Humber Seafood Institute
HSE	Humber Seafood Exchange
ICES	International Council for the Exploration of the Seas
MFA	Marine & Fisheries Agency (UK)
MMO	Marine Management Organisation
Mt	Million Tonnes
NELC	North East Lincolnshire Council
NUTS	Nomenclature of Territorial Units for Statistics
RDA	Regional Development Agency
SFC	Sea Fisheries Committee
SSB	Spawning Stock Biomass
TAC	Total Allowable Catch

1. Introduction

1.1 General description

Grimsby, within the North East England region of Humberside, was once recognised as the largest and busiest fishing port in the world. The wealth and population growth of the town was based on the North Sea herring fishery which collapsed in middle of the 20th century, and then on a distant water trawler fleet targeting cod, which declined after the 1970's cod wars with Iceland. Today the town is dominated by the fish processing sector rather than the catching sector. Processors are mainly supplied by over-landed fish from other UK ports and containerised whitefish from Iceland. There was also a general diversification by companies into frozen food processing, with Grimsby now promoted as 'Europe's Food Town'.

1.2 Location

Grimsby (NUTS code of UKE13) lies within Yorkshire and The Humber, an English region located on the East coast (latitude: 53°34'N longitude: 00°05'W). It is administered by North East Lincolnshire Council, which is based in Grimsby. Grimsby is located on the North Sea coast close the line dividing ICES IVa (southern) and IVb (central North Sea).

Figure 1: Grimsby's location in the UK and the Yorkshire & Humber Region (inset)



1.3 Key geographical characteristics of the community

Grimsby is a large town on the northeast shore of the county, on the mouth of the River Humber. It sits 16 miles southeast of Hull and 163 miles north of London.

Grimsby was founded by the Danes in the 9th century AD. It was also well situated for the rich fishing grounds in the North Sea. Once it was the principal centre for fishing in England, but direct landings have greatly diminished in the last half-century.

In 1801 Grimsby was a small town place with a population of just 1,524. In the early 19th century the town grew rapidly. By the end of the 19th century the population of Grimsby was 75,000. The arrival of the railway in 1848 made it far easier to transport goods to and from the port. Coal mined in the South Yorkshire coal fields was brought by rail and exported through Grimsby. The Great Grimsby Haven Company was formed by Act of Parliament in May 1796 (the Grimsby Haven Act) for the purpose of "widening, deepening, enlarging, altering and improving the Haven of the Town and Port of Great Grimsby". Grimsby's port boomed, importing iron, timber, wheat, hemp and flax. New docks were necessary to cope with the expansion. The Grimsby Docks Act of 1845 allowed the necessary building works. The Dock Tower was completed in 1851, followed by the The Royal Dock in 1852. No.1 Fish Dock was completed in 1856, followed by No.2 Fish Dock in 1877. Alexandra Dock and Union Dock followed in 1879. During this period the fishing fleet was greatly expanded targeting the then plentiful shoals of North Sea herring. The population of Grimsby grew from 75,000 in 1901 to 92,000 by 1931 but then remained fairly static for the rest of the 20th century.

After World War II the herring industry declined, until the failure of the seasonal herring shoals marked its end. The trawlers then headed for Northern waters within the Arctic Circle. By the 1930s, British fishermen landed 300,000 tonnes of cod annually (Plate 1), mostly from the Northern waters around Iceland.

Plate 1 Good landings of cod to Grimsby Fish Docks (circa 1930's)



© Roy Sharkey

At its peak in the 1950s, Grimsby was the largest and busiest fishing port in the world due to this trade. However as a result of the 'Cod Wars' with Iceland the industry has been in decline for many years. The first 'Cod war' took place in 1958, when Iceland, extended its coastal fishing limit, from 4 miles, to 12 miles. The Second Cod War started in 1972 when Iceland extended its coastal non-fishing limit to 50 miles. It ended with an agreement between the two countries that limited British fishing to restricted areas, within the 50-mile limit. More detail on what trends have taken place can be found in section 4 of this report.

Plate 2 Derelict Fish Docks at Grimsby, 2006



© Richard Croft

Direct landings into Grimsby have been in decline as a result of the cod wars and with more whitefish quota restrictions in the North Sea, the old fish docks have become derelict. Grimsby is still home to the largest fish market in the UK, a modern building opened in 1996 at a quayside location elsewhere on the dock estate. Most fish is now brought overland from other ports or overseas via containerisation. 70% of the fish sold at the town's market is now imported from outside the United Kingdom, particularly Iceland.

In recent years the frozen food industry has become a large part of Grimsby's economy and new industries such as light engineering, chemicals and plastics have grown. Grimsby held the record at one time for the largest 'Cold Store' in the UK. Birds Eye closed their fish finger factory in 2005, ending a link with the town that stretched back 50 years.

Grimsby is colloquially known as "Europe's Food Town" The food production and seafood heritage links are perpetuated in a UK 2006 Young's Seafood television advertising campaign emphasising Grimsby as the source of its seafood products. Some of the largest employers in the area are pharmaceutical giant Novartis (since 1951 making and employs about 400 people) on "Pyewipe" close to the A180, chemical producer Tioxide Europe (making Titanium dioxide white pigments) on "Moody Lane" and food processor Young's Bluecrest Seafood next to the docks on "Wickham Road".

The altitude of much of the area is below 60 metres. Farming is an important activity in East Anglia and Lincolnshire and it is the chief cereal growing area of the UK, the main crops being barley, wheat and sugar beet. The industrial activities of the area include steel production and fishing. Fishing, which was once a major industry all along the east coast of England, has declined significantly in recent years.

Temperature shows both seasonal and diurnal variations. January and February are the coldest months with mean daily minimum temperatures across the region close to 1 °C.

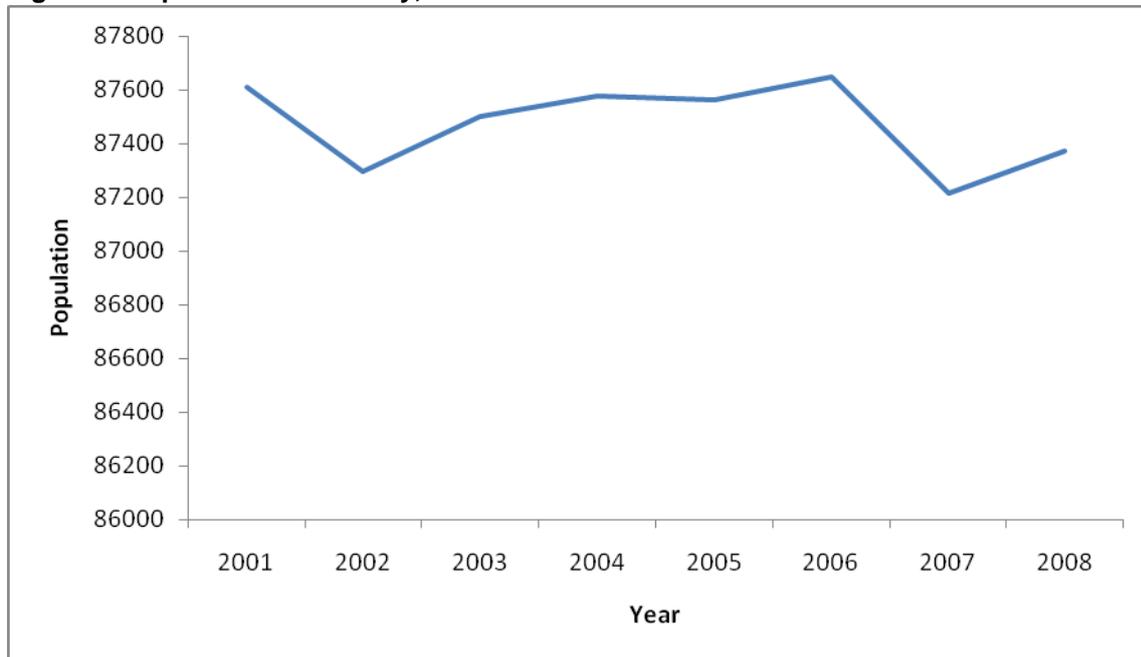
Mean daily maximum temperatures range from just over 5 °C to 8 °C during the winter months and from 19 °C to 22.5 °C in the summer. These are comparable with values found in the summer in the London area which tends to be the warmest part of the UK.

Sea temperatures off the coast of eastern England vary from 5-6 °C in February and early March to 15-16 °C in August. The temperature is governed by the influx of warm water associated with the Gulf Stream. Temperatures tend to be lower in the south than the north in winter but heat up more rapidly and so the sea is warmer in the south during the summer months.

2. Demographic aspects

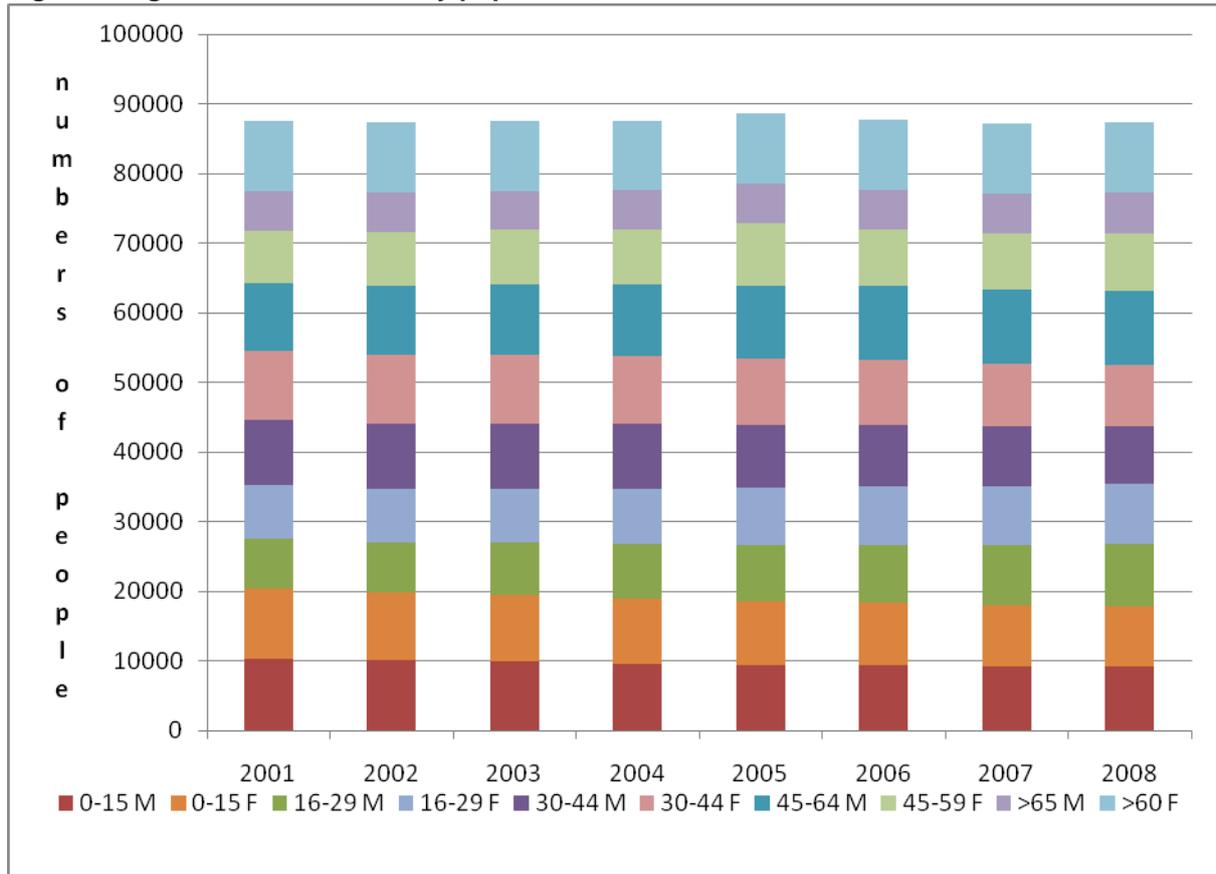
2.1 Population and population age structure

Figure 2: Population of Grimsby, 2001 to 2008



Population changes over the last decade have seen relatively little changes overall. The 2008 population figures are less than 1% below the figures for 2001. There has been some mild fluctuation in overall population numbers in this time, but it has only been in the range of 300 people. The male population in Grimsby has continued to grow since 2001 now 1% higher, whereas conversely the female population has shrunk by about 2% when compared to the 2001 figures. The changes in the age structure of the Grimsby population over this period reveal an interesting pattern, in both the male and female populations, there are decreasing numbers of the younger age bands, 0-15 years, showing ~15% decrease over the 2001-2008 period. The 16-29 years both show dramatic increases, with 23% increase in the male population and 12% for the female population. Both males and females have decreased by ~12% in the 30-44 years group. Onwards, there is an increase in the aging population between 45 and retirement, both sexes showing a 9% increase and those of retirement age and older have maintained a stable population. Compared to the national population, this is a fairly typical pattern, with influences of low fertility from previous decades, especially in the 1970's, account for the lower numbers in the 30-44 age band.

Figure 3: Age-structure of Grimsby population, 2001 to 2008



2.2 Ethnicity and migration

Ethnicity in Grimsby is predominately White, representing 98% of the population, with the other 2% being composed of Mixed, Asian, Black and Chinese groups. The diversity seen at Grimsby is not typical of the country or even of the local region, the Yorkshire and Humber region is 93% predominately white, compared to the national average of 91%.

At 45 people per 10,000 residents, the region had the third highest international migration rate in England after London and the East of England, Grimsby was formally a cluster area for the government's dispersal policy dealing with asylum seekers, and Hull is still a active cluster in this field. It is a combination of asylum seeking migrants and de novo European member state residents looking for better prospects of employment in the UK that contribute to this number. It is a pattern seen over the UK in general, foreign citizens are very willing to fulfil practically any job available, in Grimsby particularly given the intensity of food processing that takes place this type of work would be a big draw, it is not uncommon for them to become new entrants in sectors such as fisheries if they feel there is sufficient benefit from such employment.

3. Economic aspects

The main sectors of the Greater Grimsby economy are food and drink; ports and logistics; renewable energy; chemicals and process industries and digital media. As a fishing port it is recognised as the main centre of the UK fish processing industry. In recent years, this expertise has led to diversification into all forms of frozen and chilled foods. Grimsby is one of the single largest centres of fish processing in Europe. Grimsby and Immingham maintained its position as the UK's busiest port in terms of tonnage in 2009 with 54.7 Mt (down 10.6 Mt on 2008), followed by London with 45.4 Mt (down 7.5 Mt). Ultimately Grimsby is improving through its reputation associated with the food industries, and is consequently seeing lots of money and redevelopment being invested here. In years past, Grimsby was a proud and major fishing port on England's North Sea coast. Until the 1970s, there were 6,000 sea going fishermen and a further 40,000 land based jobs dependent on fishing within the port. Today it has a vast fish market, but most fish comes down from the North and the port currently has a modest fishing fleet to reflect its contemporary status. The decline in fishing has left Grimsby with severe social problems, not dissimilar to those experienced in the coalfields following the decline of mining.

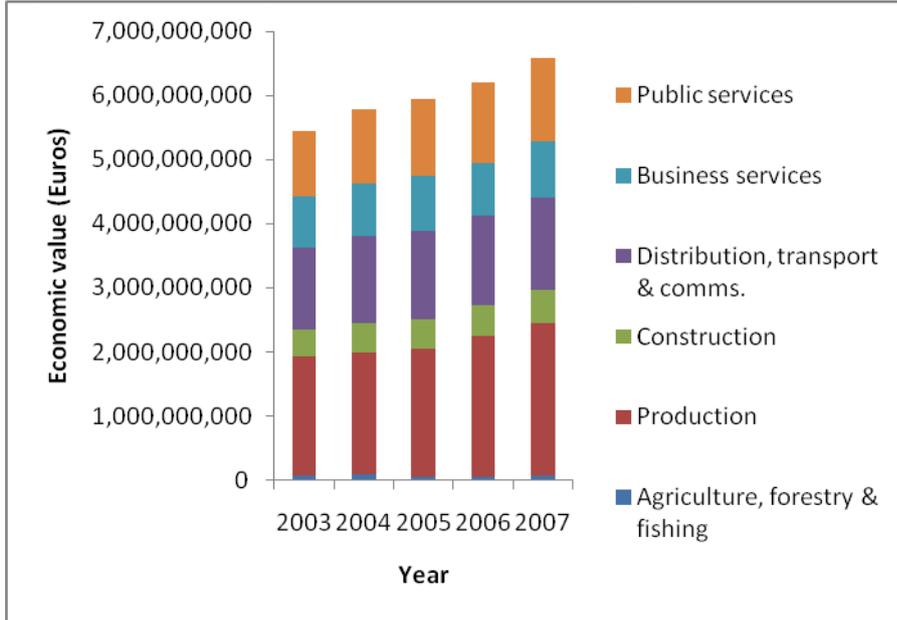
3.1 Importance of economic activities

The key economic sectors (Figure 4) are production, distribution and public services as these have all shown consistent growth over the last 5 years, with total economic output in Grimsby increasing by 20% in this 5 year period. Currently these 3 main sectors account for 78% of Grimsby's economic output, with primary production by the agri/fisheries sector now contributing less than 1% overall. Every sector except the agriculture/fisheries sector has shown growth in this period, for the agri/fisheries sector, the economic output has been unstable, with a reduction of about 1/3rd of its output being reduced in 2005 and 2006, but it has since recovered.

The Grimsby economy is highly reliant upon the food production sector, as tourism opportunities are limited, with nearby coastal towns such as Cleethorpes benefiting from a seasonal tourism trade. Due to Grimsby's dependence upon the processing sector and its production of frozen foods, with fish products being supplied by foreign supplies, the fisheries sector is still struggling to maintain its position.

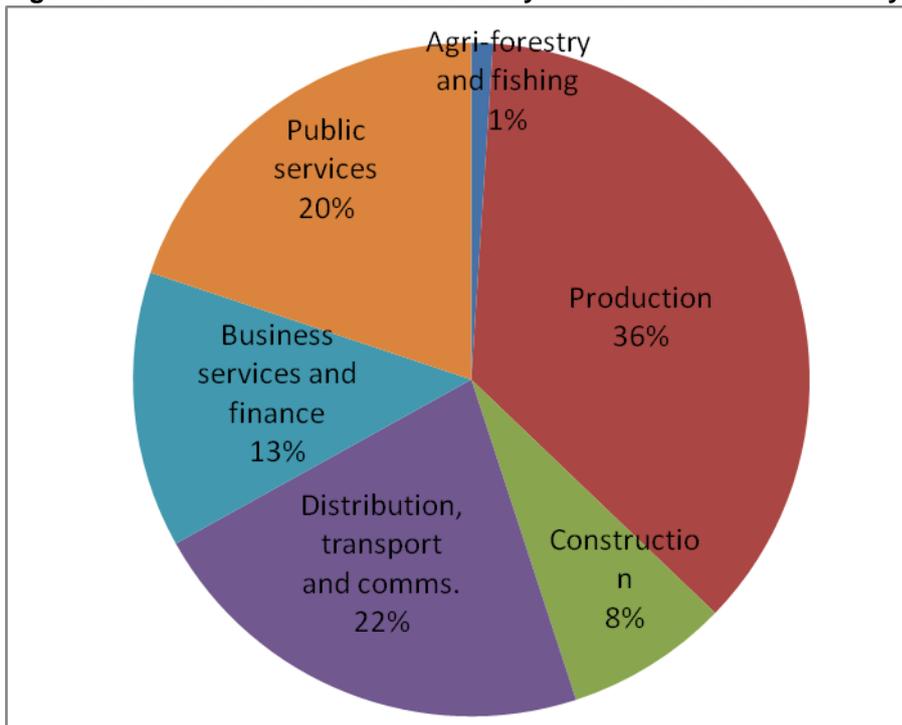
The total economic value of Grimsby's activities was worth €6.5 billion, with the fisheries industry worth €67 million Euros (Figure 5).

Figure 4: Turnover by different sectors in Grimsby, 2003 to 2007



Source: UK Office of National Statistics

Figure 5: Contribution to total turnover by different sectors in Grimsby 2007 (%)



Source: UK Office of National Statistics

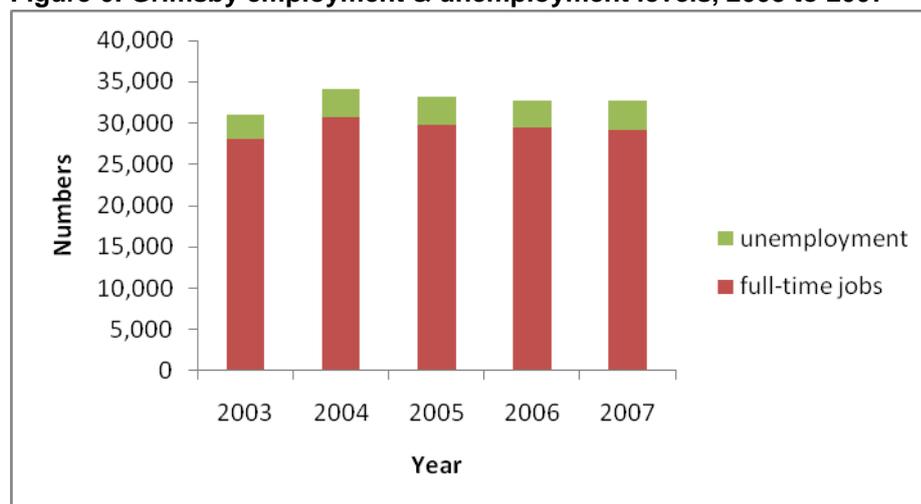
The food industry is of the biggest significance to the Grimsby economy;- Over 500 companies are based in Grimsby with ties to the food industry alone. The development of the Europarc business park, a collaborative effort between both the public (Yorkshire Forward) and private sector (Wykeland Group) has been crucial for the local economy. Opened in 1999 and it has continued to expand and attract huge investment from big names from within and outside of the region. Of the businesses based in the Europarc site, 90% represent interests in the food industry and contributes to maintaining the growth in

Grimsby's economy and its employment capabilities. The other non food industry activities in Grimsby account for about 120 companies involved in activities ranging from petrochemical production through to biotechnology start ups. These non food sector jobs employ upto 15,000 people in Grimsby and from the wider catchment of the Humber region.

3.2 Employment and unemployment

Grimsby's employment pattern follows very closely to the national picture, except there are marginally more part time jobs available 35% of jobs are part time employment positions (compared to the 31.2% at the national level). Unemployment in the area is 13.9% almost double the national average of 7.4%. The local economy of Grimsby is geared very specifically towards the fishing industry and other manufacturing industries, over the last few decades many manufacturing companies have either gone into foreclosure or relocated, which would contribute to a larger than the national average of unemployed people, who are trained for one particular type of industry and are unlikely to find suitable alternative opportunities offered in Grimsby. The fisheries in Grimsby have also suffered job losses and shifts in industry with changes in national and international legislation.

Figure 6: Grimsby employment & unemployment levels, 2003 to 2007

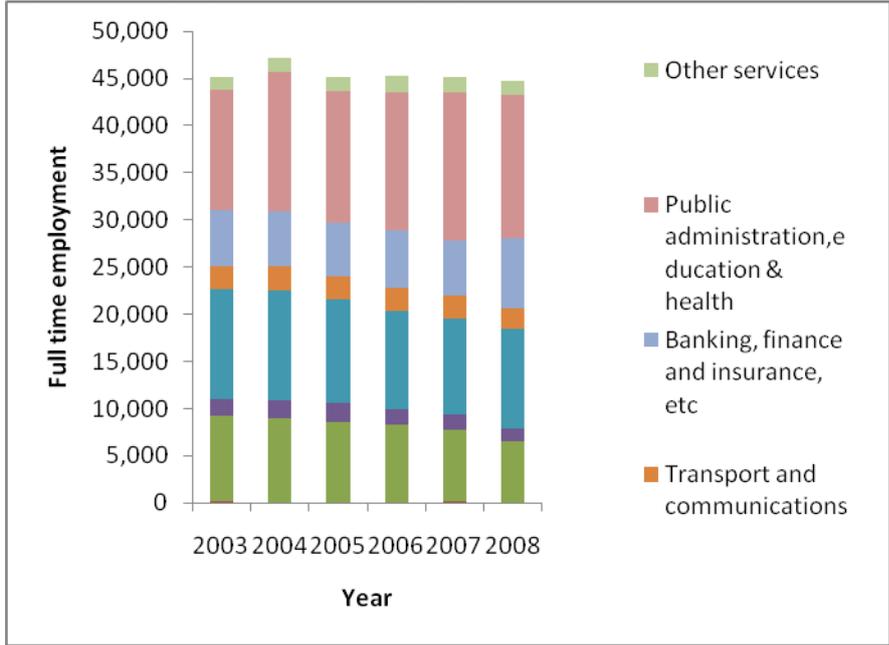


Source: UK Office of National Statistics

Overall there is a decreasing trend of jobs in all sectors, indicating Grimsby's economy is declining however there are key sectors which are showing strong growth despite the overall decline. Grimsby is the chief vehicle-handling centre for the North, handling almost 400,000 vehicles annually for leading car manufacturers. The banking/finance sector has shown fluctuating growth, the public services sector has consistently expanded, while fishing related jobs have been sporadic year on year, which is fairly typical for most UK fishing dependent communities in recent years.

The recent economic crisis has inevitably affected some of Grimsby's key private sectors, namely distribution (particularly) motor vehicle and

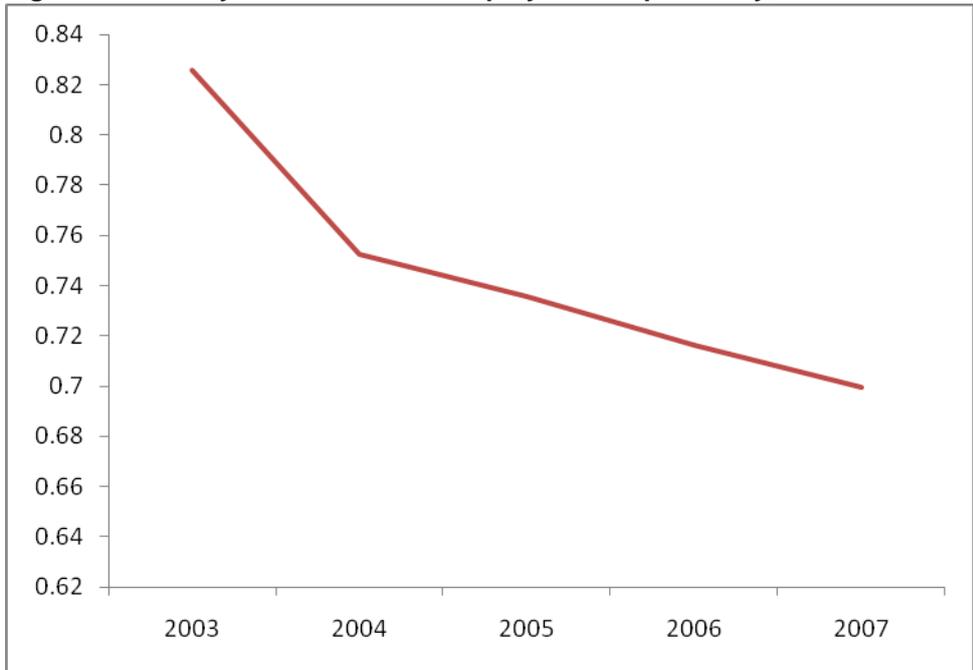
Figure 7: Employment in Grimsby by sector, 2003 to 2008



Source: UK Office of National Statistics

Grimsby has always been a fishing port, but over the last 15 – 20 years there has been a lot of diversification into the wider food production sectors of Grimsby. Grimsby is now marketed as ‘Europe’s food town’. The fisheries and processing sectors are heavily involved and dependent upon maintaining and building upon this reputation. Figure 8 displays what an impact the Grimsby processing sector has had upon Grimsby’s dependence upon fisheries sector jobs. Grimsby has become established as a processing centre, with more and more development and investment being given for that function, coupled with the fact that most of the fish landed in Grimsby are non local UK boats or foreign landings, the local fisheries are becoming even less important to the local economy.

Figure 8: Grimsby fisheries sector employment dependency, 2003 to 2007



Source: UK Office of National Statistics & The Humber Economic Partnership

3.3 Infrastructure

- The nearest motorway to Grimsby is roughly 15 Miles away, the M180, which connects through directly to Grimsby via the A180
- 14 miles (23 km) west of Grimsby is Humberside Airport
- Most notable ports in the area are Hull & Immingham. Immingham port is currently going through an expansion development plan aimed to be completed by 2030.
- Grimsby Town is connected to the main East Coast rail network via Doncaster, with London being 3 hours away.
- Past the age of 16, for A-level education, Grimsby's Franklin College gets excellent results (as does the Toll Bar College). The Grimsby Institute of Further & Higher Education, which is located near to Franklin College, operates mainly to educate vocational students and achieves respectable examination results at all levels of adult education. The Institute has attracted a large number of foreign students from China to business studies courses in recent years following on from a tradition which saw many students from overseas taking courses connected with the fishing industry.
- Nearby further education can be found at the University of Hull, which offers a vast array of courses, the more fishing industry specific courses would be part of the Centre for Environmental and Marine sciences, dealing with conservation of marine environment and techniques suitable for sustainable fishing, as well as the Hull International Fisheries institute, Humber Seafood institute and Grimsby Institute covering a range of topics such as inland fisheries management, policy and planning, institutional development, development of management strategies, stock assessment and fisheries biology, technical and conservation regulations, social and community issues, economic policy and trade development, at various levels of higher education.

3.4 Local development plans

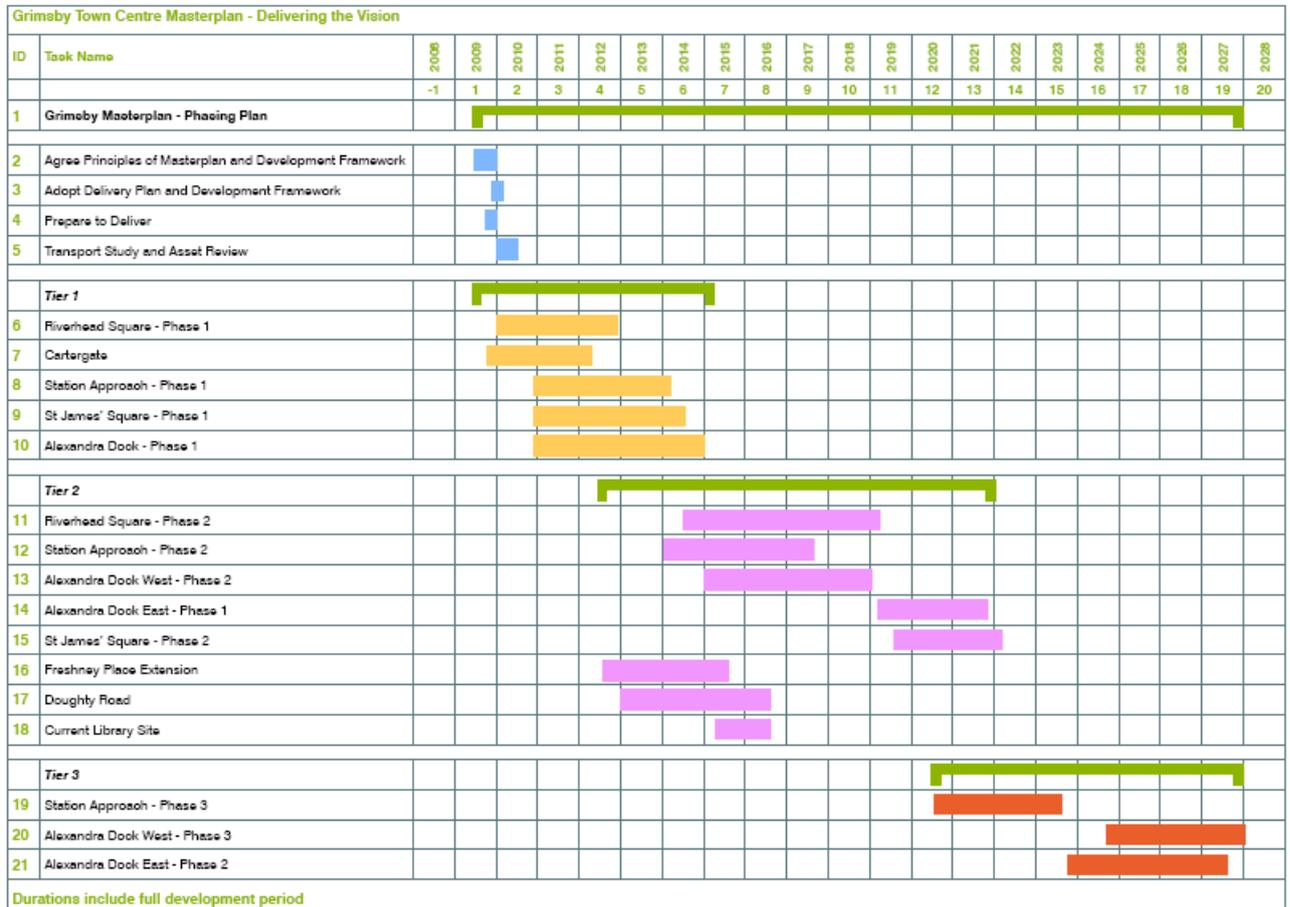
North East Lincolnshire council have begun work on the redevelopment of key areas that are of vital importance to Grimsby, the residents and its economy. The master plan aims to enrich the town centre and its assets, so that it will become a place for people to enjoy and which will attract more business and investment. The master plan is a long term investment into making Grimsby a place that will hold on to its residents, attract migrants to the area, make it a popular tourist destination and help develop it into a thriving business zone. Immediate work is to be carried out over the 3 years of 2009-12, with following work taking place from 2012 onwards, and anticipated completion date of 2027-29.

Over the course of 2009-12 North East Lincolnshire council plans to:

- Improve the quality of the built and natural environment to create an attractive town centre which makes the most of the North Sea location;
- Strengthen the local economy to attract skilled people, visitors and investment which will strengthen the local economy. Attracting higher value businesses in sectors such as renewable energy to diversify the local economy is central to the vision for the town centre;
- Create a safer and more secure area which people will visit to relax and enjoy; and,
- Improve health and wellbeing with more green spaces and trees and will encourage walking and cycling in the town centre.

Grimsby docks are planning to install new vehicle loading bays, fully enclose the market itself and add temperature controlled facilities for use during the warmer weather. Yorkshire forward are the main investors of this project with a fund of £1.5 million set for this work, more information on Yorkshire Forward and the work they do can be found described in section 5.

Figure 9 Timeline for Grimsby Development Masterplan to 2027



Source: "Grimsby Town Centre Masterplan 20th October 2009"

4. Fisheries and aquaculture sub-sector

The fisheries sector of Grimsby is predominately processing based, with no known aquaculture taking place. Fish landed directly into Grimsby for 2009 was worth 5.42 Million Euros.

4.1 Details of the local fishing fleets

The local Grimsby fleet is composed of 39 vessels, 20 being classified as inshore <10m vessels and 19 being of 10-24m (Table 1).

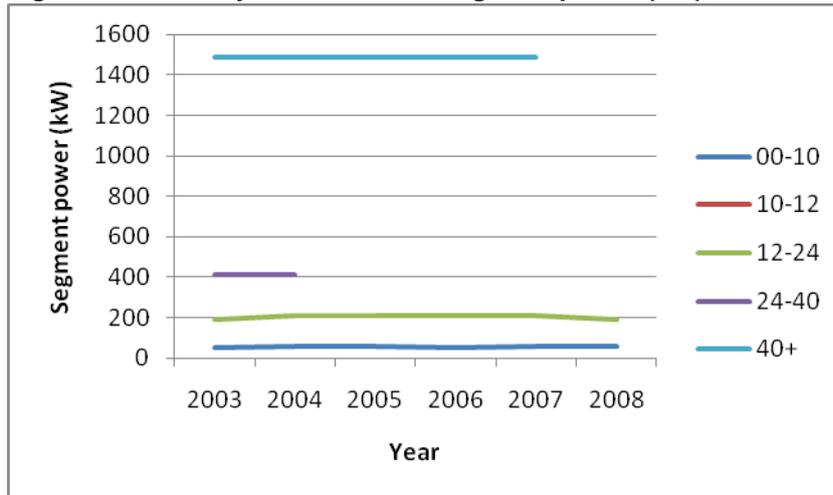
Table 1: Grimsby fleet segments, 2010

Segment (length class)	Number of vessels	main gears used	Number of crew (average)	Main species fished	Main fishing locations (ICES areas)	Trip length (average days)
00-10	20	pots / nets /trawls / lines	1-5	Crabs, lobsters, whelks / sole, brown shrimps, plaice, Cod /	Ivb/c	1
10-12	1	pots / nets /trawls / lines	3	Crabs, lobsters, whelks / sole, brown shrimps, plaice, Cod /	Ivb/c	1
12-24	18	pots / nets /trawls / lines	3+	Crabs, lobsters, whelks, nephrops, / sole, brown shrimps, plaice, Cod /	Iva/b/c/VIId	>1
24-40						
40+						

Source: The MMO (previously Marine & Fisheries Agency)

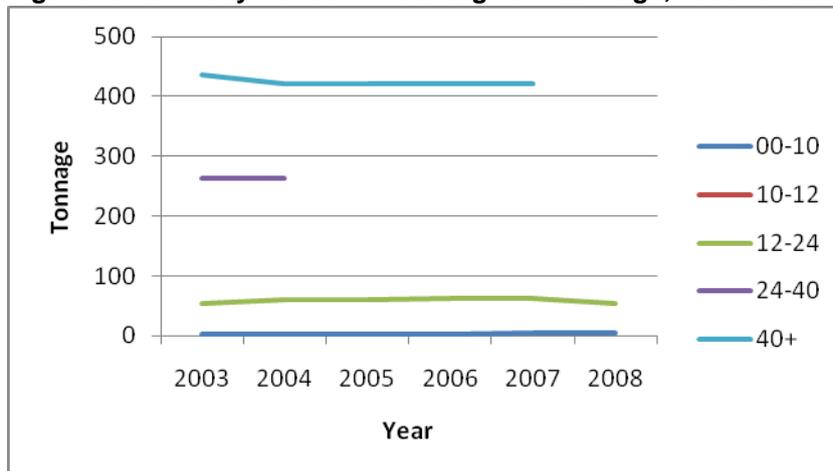
Grimsby is located close to the line dividing North Sea ICES sub-area IVb and sub-area IVc (Figure 10) Fishing activity by the inshore fleet therefore occurs within a 30 mile radius of the port within these sub-areas. The large vessel fleet extend their activities into the Northern North Sea (Iva) and the Eastern Channel (VIId).

Figure 12: Grimsby trends in fleet segment power (kW), 2003 to 2008



Source: The MMO (previously Marine & Fisheries Agency)

Figure 13: Grimsby trends in fleet segment tonnage, 2003 to 2008



Source: The MMO (previously Marine & Fisheries Agency)

The inshore vessels are likely to make only single day steaming to local grounds, and sleep in their own bed the same night. Inshore fishers use a variety of methods to target a variety of local species. It is not uncommon to see multiple gears being used and switching between species as one season declines in favour for another which is booming, an obvious example of this would be swapping gears in winter to target cod, and then using other gears to exploit flatfish like plaice and sole in the warmer months.

The inshore fleet are very adaptive, like elsewhere in the UK and so if some fisheries provide a good return on investment it is not uncommon to see a few opportunistic entrants taking advantage of plentiful supply. Generally these opportunistic fishers are not new blood entrants but are from fishing backgrounds and supplement fishing with other part time/seasonal work.

Unlike the inshore fishers, the larger vessels have the ability to exploit more distant stocks, and so can in essence afford to pick and choose which species it is that they target and how long they will invest into each fishing trip. It is the larger >12m vessels who specifically target

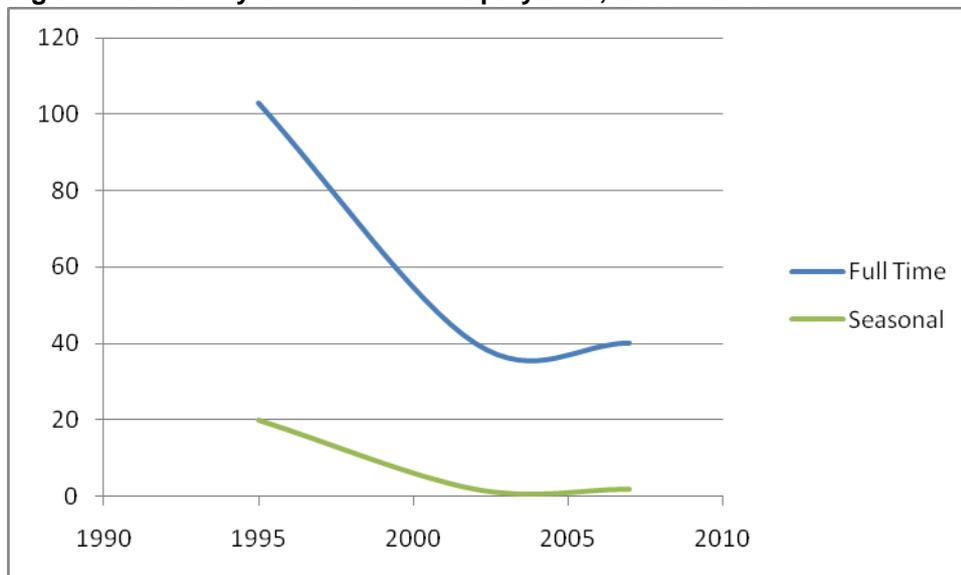
Nephrops, as these are not found in the local waters around Grimsby. Until the mid-1970s, this port supported around 200 offshore fishing vessels plus around 30 inshore boats.

The fleet still principally works offshore and over 50% of the vessels are ex-Danish anchor seiners of 17–24 m, some having been adapted to trawl or use static gear. In addition to the local fleet, up to 19 >10m Dutch ‘flagship’ boats are administered from Grimsby, where they are registered as British owned and fish against the UK quotas, but have mainly non-British crews and land in other EU countries. It has mainly been the result of legislation that there has been a marked decrease in vessel numbers and changes in their capacities over the last 30 years.

Historically there have been larger vessels, 24m+ working out of Grimsby up until as recent as 2007. Factors such as legislative pressure from the home government and from the European Union to reduce effort may have resulted in these larger vessels being decommissioned. There are 3 large vessels in the >24m segments in 2003, by 2008 these have most likely been scrapped under the EU decommissioning scheme and the owners have been helped to buy a smaller vessel (however, controversially more powerful).

Like nearby Hull, the port’s processing industry has become increasingly dependent on fish transported overland from other UK ports and imported from countries such as Iceland and Norway. The local economy in Grimsby has become ever more dependent upon imported fish for its processing sector, which may have increased the difficulties of selling local catch in this part of the county.

Figure 14: Grimsby trends in fleet employment, 2003 to 2008



Source: CEFAS / DEFRA – Coastal Inshore fisheries report

In recent years, skippers have struggled to attract reliable crew. This is a consequence of several factors including the availability of more highly paid and regular employment in other industries. Young locals generally do not want to become fishers, either they have experienced at first hand from a family member the troubles associated with the industry, infrequent catches and ever increasing legislation. A huge obstacle for allowing new entrants into the fishing industry is the cost, it is not cheap by any means to buy the hardware, to sort

out the licences and paper work and then pay for quota rights, as currently many UK fishers must do. It is not uncommon that reliable crews are from a diverse background, Eastern European and new European member state countries.

4.2 Fish stock status

Cod

The most recent spawning stock biomass (SSB) assessment for North Sea Cod was carried out in 2008 and has resulted in the stock being classified as suffering reduced reproductive capacity. Cod abundance remains unchanged, with a historical low in 2006. SSB has shown an increase since then but remains below the biomass limit (B_{lim}). Fishing mortality has shown a decline since 2000 with ICES reporting the cod stock is now being harvested in a sustainable manner, albeit at greatly reduced fishing mortality levels.

The EU–Norway agreement management plan has the main objective of keeping SSB above 70 000 tonnes (B_{lim}), and reducing fishing mortality (F) to 0.4. In addition the EU has adopted a recovery plan for this stock with the aim to increase the SSB by 30% per year to B_{pa} .

Haddock

The most recent assessment of SSB of North Sea Haddock was carried out in 2008 and ICES has classified the stock as having full reproductive capacity. SSB in 2008 is estimated to be above B_{pa} . Fishing mortality in 2007 is estimated to be below F_{pa} , but above the targets specified in the EU–Norway management plan, and being harvested sustainably.

The main elements of the management plan are a target F of 0.3 with a limit of 15% change in TAC provided SSB is maintained above 140 000 t. (If SSB is between 140 000 t and 100 000 t, F is reduced in line with SSB to reach $F = 0.1$ at $SSB=100\ 000$ t. If SSB is at 100 000 t or below, F is 0.1).

Whiting

North Sea whiting stocks are a relatively data poor stock and so the longest time series for this stock exists only back until 1990. The most recent assessment suggests that whiting SSB is the lowest it has been (on record). Fishing mortality has decreased through the time-series, but has increased in recent years. Recruitment has been very low since 2001. There are no management objectives in place for the North Sea Whiting stock. ICES have recommended a total catch of < 11000 tonnes for 2010

Plaice

The ICES assessment for the North Sea plaice stock indicates that the stock is being sustainably harvested and has full reproductive capacity. The plaice SSB is estimated above 230 000 tonnes and fishing mortality for this stock is decreasing. Whilst recruitment of this stock has been generally poor, 2007 recruitment was average. The Management plans for the North Sea plaice stock are aiming at annual reduction of fishing mortality by 10% (in relation to the preceding years) and a maximum change in Total Allowable Catches of 15%.

Saithe

North Sea saithe stock has been recently assessed (2008) and classified by ICES as being harvested sustainably and is at full reproductive capacity. Since 1998 the SSB of the saithe stock has been >200 000 tonnes. The fishing mortality this stock experiences falls well within the intended guidelines. The management objectives for this stock are; to keep the SSB stock above 106 000 tonnes and to ensure that exploitation of the stock is carried out with a appropriate fishing mortality.

Shellfish

The North Sea brown shrimp fisheries are subjected to minimum mesh net sizes and bycatch reduction devices to minimise fishing mortality of juvenile white and flatfish. Around 34,000 tonnes of brown shrimp are landed annually, 30% landed by some 177 German vessels.

Brown crabs landed at a UK port are governed by minimum landing rules.

At present there is little information known about whelk populations, their robustness and there are also no restrictions upon gear and fishing effort.

Table 2: Stocks exploited by Grimsby fleet and their status

Species	ICES Area	Management responsibility	Stock status relative to MSY (above, near, below, unknown)	main management regulations
Cod	Ivb/c	UK / EU	Below	Quotas, Gear & effort restrictions, area closures
Haddock	Ivb/c	UK / EU	Near	Quotas, Gear restrictions,
Plaice	Ivb/c	UK / EU	Near	Quotas, Gear restrictions, area closures
Saithe	Ivb/c	UK / EU	Near	Quotas, Gear restrictions

Whiting	Ivb/c	UK / EU	Below	Quotas, Gear restrictions
Brown Crab	Ivb/c	UK	Unknown	Minimum landing size
Velvet Crab	Ivb/c	UK	Unknown	
Brown Shrimp	Ivb/c	UK	Unknown	N/A
Whelks	Ivb/c	UK	Unknown	

Source: ICES

4.3 Fisheries infrastructure

Located on the South Bank of the country's busiest trading estuary, the Humber, Grimsby caters for all types of cargo and handles vessels of up to 6,000 dwt.

Dock/Quay	Maximum Size of Vessel			
	Length	Beam	Draught	DWT
Commercial Docks	145 m	20.5 m	5.8 m	6,000
Fish Docks	73 m	12.8 m	5.8 m	

Services provided through the Grimsby Fish Dock Enterprises include:

- Slipways
- Marine engineering
- Construction and repairs
- Fuel, water and ice supplies
- Box washing
- Shipwrights

- Painters
- Bunkers, all types available on request
- Power supply and metered water available
- Service and mooring quays

Built over 60 years ago, the slipways at Grimsby remain in full operation, with two slipways, the largest slipway cradle having a capacity of 1200 tons. The slipways are now managed by a separate company, the Great Grimsby Slipway Company, which provides vessel repair and refurbishment services. There is also a separate box washing company, TFA Box Co.

The €22 million Grimsby Fish Market development opened in 1996. An electronic auction system went online in 2001, enabling purchasing from the market by remote buyers. The facilities provide 260m landing quays for fresh or frozen fish and chillers with a total capacity in excess of 1000m². The market is owned by Grimsby Fish Dock Enterprises Ltd., a partnership of the local fishing interests which also manages separate companies providing ancillary services that are located at the fish docks (including landing/grading, slipway and box washing services).

There is a dedicated ice plant on site and chiller facilities too. The port area is also well supplied by several local chandlery companies.

Plate 3 Grimsby fish market and docks (from Dock Tower)



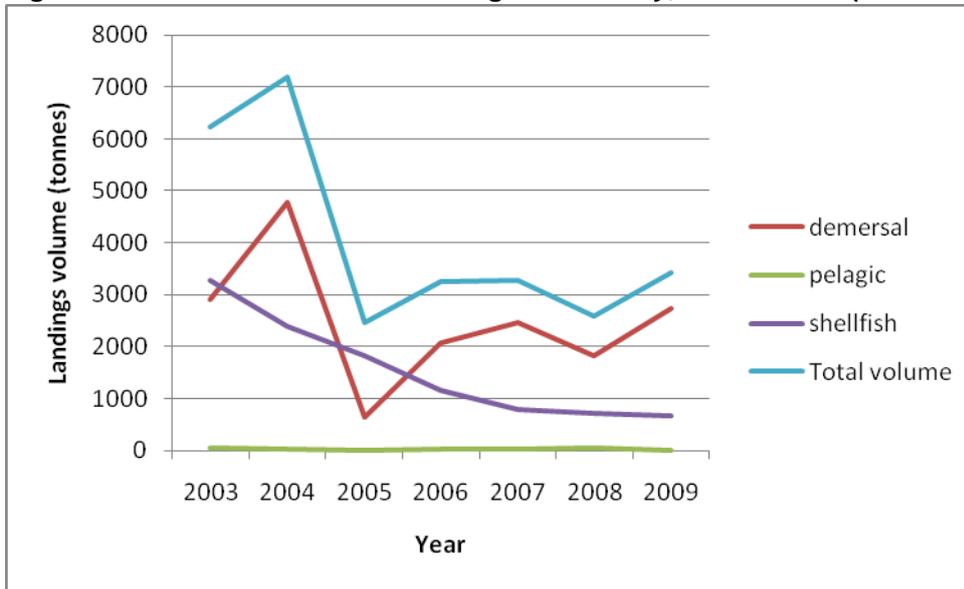
©Roger Damm

4.4 Details of the local catching sub-sector

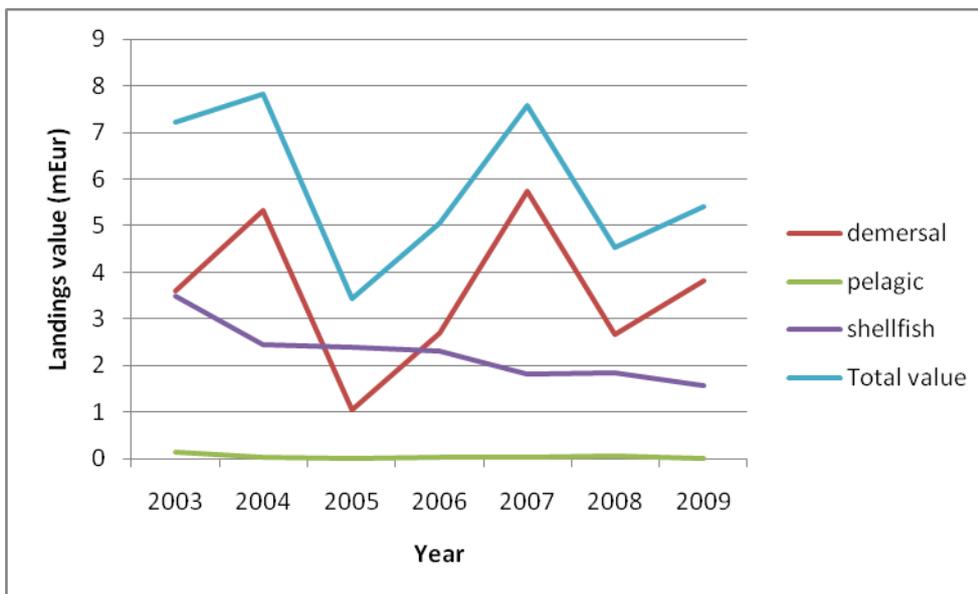
Cod dominates the demersal landings at Grimsby, accounting for 1,833 tonnes worth €2.5m in 2009, recovering from a sharp decline in overall landing volumes in 2005. Other important species are haddock and whiting, whiting replacing the later in terms of volumes landed. Predominately white and flatfish are landed and accounted for 2,740 tonnes worth €3.9 million in 2009, 80% and 70% respectively of the total landings in Grimsby.

Brown crabs are the most important shellfish catch landed, 413 tonnes worth €55,135 (2009), however even though they account for 63% of the landings by volume, they only account for 34% of the shellfish landings value. Since 2003 there has been a marked decline in shellfish landings, especially in the key species of Brown crab, lobster and whelks across all vessels.

Figure 15: Volume and value of landings to Grimsby, 2003 to 2009 (tonnes & €million)



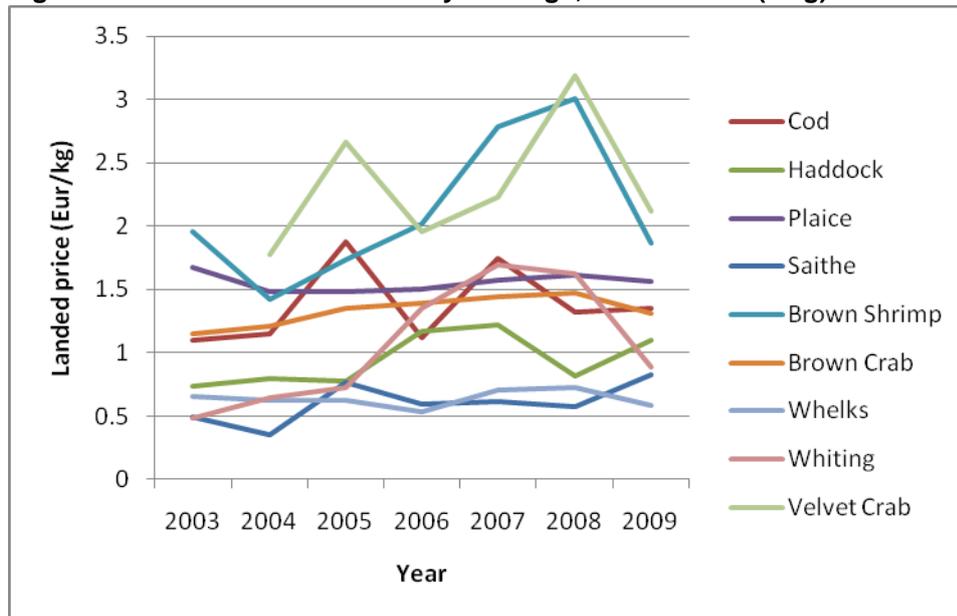
Source: The MMO (previously Marine & Fisheries Agency)



Source: The MMO (previously Marine & Fisheries Agency)

Landed prices at Grimsby have fluctuated for most of the main landed species, and are generally low. Brown shrimp, velvet crabs and whiting have seen huge rises in the landed price over the last 5 years, which have now since dropped back to similar prices in 2003. This trend is a very good indicator of how market forces have impacted upon landings, with Cod and usual whitefish landings falling, alternative species can fetch decent prices and become well sought after. Plaice and brown crabs have remained relatively stable at around €1.5 per kilo landed. Haddock has shown progressive increases in its landed price over the last 5 years.

Figure 16: Price trends for Grimsby landings, 2003 to 2009 (€/kg)



Seasonality plays a major influence on the fisheries, different species are only present at different times of the year. Cod is only present in the colder months (September – February) of the year and most vessels rely on either static nets or lines to fish them. This is a switch to a very selective gear, compared to summer, when most vessels fish with trawled gear.

5 medium sized Grimsby based vessels have worked on oilrig guard duties since the mid 1990's when this proved more profitable than fishing, which frees up quota for others. The nature of alternative vessel work is very seasonal and strongly dictated by market prices and landing trends at the time. This is an ever growing trend present in Grimsby, fishers looking for alternative sources of employment when catches are not feasible. It is not uncommon for fishers to turn to angling tours.

4.5 Details of the local processing sub-sector

The processing sector of Grimsby is very diverse in the types of processing that take place and is dominated by the Young's Seafood Group (owned by Findus), who have their own processing facilities and also own several local companies who specialise in particular fish processing methods, such as smoking, or deal with particular species. The majority of the 100+ registered fish processors in the area are small family businesses, some focusing specifically on traditional methods, others on supplying certain markets and so account for most of the primary processors in the area. When considering the larger processors, it is apparent that their capabilities are much larger and that they are interested in a much wider

range of species, thus accounting for the secondary processing in the area. With such a diverse range of processors there is an equally diverse relationship between catching vessels and the processors themselves. Many of the smaller processors are either run alongside a family owned fishing vessel and therefore process all their own catch, or will have local arrangements with members of the local fleet to ensure that both can guarantee work flow to some degree. Above these relationships, it becomes a case of catches being subjected to the local auction and the processors being dependent upon whatever species are available through this outlet. As has been seen elsewhere in the UK, there is a trend in the decrease of landings taking place and the increase in fish imported. The pattern of landings seen in Grimsby has also been seen across the UK, with falling landings of cod and haddock being made whilst landings of whiting have increased dramatically. The impact on the local processing industry is not yet understood. The processors in Grimsby are all generally equipped to deal with the local North Sea species, with a few being able to process “non” native species. White and flatfish are the main bulk of the processed fish in this area, and given the recent increase in shellfish landings (and shellfish species landed) the shellfish processors are equally as important.

Between 50 and 70 per cent of the UK’s white fish is processed in Grimsby, which amounts to over 750,000 tons a year.

There is so much emphasis and investment in the processing sector that the Grimsby Fish Market and Seafood village have been awarded continual investment, most recently from the European Fisheries Fund to develop the cold store facilities at Grimsby docks, with 20 self contained units, each of 2,000 square feet factory space and an additional 1,500 square feet for office and storage.

Table 3: Processing sub-sector companies in Grimsby – turnover and employment

Company Name	main species	total value sales most recent year (€'000)	number F/T employees most recent year
YOUNG'S SEAFOOD LIMITED	White Fish, Lemon Sole, Mussels, Prawns, Queen Scallops, Plaice, Tuna	381,859	2182
ICELANDIC GROUP UK LIMITED	White Fish, Skates, Shrimps, Redfish, monkfish, Prawns, Scallops,	248,549	1202
NORTHCOAST SEAFOODS LIMITED	white fish, prawns	44,081	10
SEALORD CAISTOR LIMITED	White fish, plaice, flounder, mullet, Sole, Shark, Tuna, Perch, Tilapia, Dory, prawns, lobster, crayfish, pandalus, mackerel, squid, octopus,	40,819	174
THE CROMER CRAB COMPANY LIMITED	Brown, Velvet, Lobster	32,327	224

POLARFROST SEAFOODS LIMITED		19,394	5
	White Fish,		
KIRWIN BROTHERS LTD.		17,247	94
B MIDGLEY SEAFOODS LIMITED		10,164	29
SUPERIOR SEAFOODS LIMITED	White Fish, Salmon, Plaice, Sole, Brill, Mackerel, Mullet, Tuna, Swordfish, Shark, skates/Rays	8,839	64
FLATFISH LIMITED	flatfish, lemon sole, plaice	7,484	48
NECTARBECK LIMITED		1,706	
KEITH GRAHAM LIMITED		1,620	11
GRIMSBY FISH SALES LIMITED		542	
THE SALMON POACHERS LIMITED		121	4
RICK'S FISH LIMITED		103	
KAYS OF GRIMSBY LIMITED		96	
GRIMSBY FISH SERVICE LIMITED		62	
PINEGAIN LIMITED		25	
Total		815,037	4,047

4.6 Details of the local aquaculture sub-sector

There is no aquaculture production in the area. The relatively open and exposed English east coast shows highly dynamic coastal processes with extensive areas of coastal erosion. These characteristics have hindered aquaculture development in the region. In the more immediate area, the Humber is a very busy shipping area surrounded by heavy industry making it unsuitable for aquaculture operations.

4.7 Details of the local ancillary sub-sector

Quayside distribution was formed in 1997 to serve the fish market and processors in the Humber region in recognition of most fish being over-landed by road to the market and with the installation of electronic auctioning in 2001 provided delivery of fish purchased on the auction to remote buyers. It operates a 70-strong freeze/chilled container lorry fleet (2007) based throughout the UK and in 2004 expanded operations to provide European distribution.

In contrast to the centralisation seen with Quayside, the remaining companies involved in the ancillary sector tend to be smaller, family sized businesses. The Grimsby Ship Repairers & Engineers Association, founded in 1944 by Grimsby trawler owners, acts as a go-between for these companies allowing them to collectively deal with work that would be too much for any single company.

As a legacy of the fishing industry, Grimsby has the largest concentration of cold storage in Europe. Much of this is now utilised by the food processing and distribution sector that has grown to fill the gap left by reduced fish landings.

The main ancillary industry in the Humber area is, however, located in Hull and vessels will also dock at Hull for maintenance and repair.

5. Governance

5.1 Key local institutions

The following organisations have all been involved in regenerating Grimsby and assistance in addressing the shrinkage seen in the fishing sector:

North East Lincolnshire Council is the co-ordinator and driving force in securing investment and interest for the redevelopment of Grimsby. The Council are involved with every project that takes place and produced an overarching 25 year development plan that addresses every aspect of Grimsby and its redevelopment.

Yorkshire Forward is a Regional Development Agency (RDA), tasked with improving the economy of Yorkshire and the Humber. It has been involved with much of the development work taking place in Grimsby, with such projects like the Europarc business park, the Grimsby renaissance development project as well as others, several projects linked with improving the Grimsby fish market and the associated docks. It also provided the funds for food sector initiatives, including the Yorkshire and Humber Seafood Group, formed in 2006 to provide an industry support for the regions seafood sector. With the new UK Government proposing a reduction in organisations such as RDAs, the future of Yorkshire Forward is uncertain, with its development role expected to revert to local councils.

Grimsby Renaissance, is a proactive forum that is committed to involving as many members of the community in the redevelopment plans of Grimsby. It aims to ensure representation from stakeholders at all levels so that collectively the changes that take place in Grimsby's development are appropriate and optimise positive outcomes. The Grimsby Town Centre Forum provides a gathering point for people with similar interests in the development of Grimsby, and aims to be an effective instrument in representing the opinions of those members involved.

The Grimsby Fishing Vessel Owners Association, active for over 50 years, provides support for all its members dealing with all aspects of the catching sector, from storage facilities, through to marketing services on a national level.

Grimsby Fish Merchants Association, much like the fishing vessel owners association provides support for all the fish processing members based and involved in the Grimsby food industry, ranging from day to day facility support through to lobbying, representation and involvement with groups who will bring development to this industry. The Association formed in 1911 and currently has approximately 100 members.

5.2 Public intervention

The most significant recent investment in Grimsby was the €22 million construction of the fish market in 1996, which received funding under the 1994-1999 FIG scheme. The fish docks have also received funding assistance with the maintenance of fisheries sector infrastructure.

Table 4 below provides information on the contribution of FIG to fleet and non-fleet investment between 2000 and 2006. Under FIG there were 15 Grimsby-based vessels scrapped at a total cost of over €8million, while only one Grimsby-based vessel received modest modernisation funding of €3,000. The decommissioning of the fleet funded under FIG removed 15 vessels between 17m & 41m in length. Eight of these were stern trawlers, 3 beam trawlers, 3 gillnetters and one longliner.

Over the 2000-2006 FIG programme four Grimsby-based fish processing companies received just under €60,000 in total as part of their investment totalling €400,000. It should be noted that fish processing capacity in the Humber region is not confined to the Grimsby NUTS area and the processing sector in the Humber area received additional investment.

FIG also funded two projects under 'innovative measures' based in Grimsby. One project was developing expanded polystyrene recycling facilities for the seafood sector (a major source of waste with fish primarily being imported into the area rather than from direct landings) and the other was exploring the development of biofuels for fishing vessels.

Table 4: FIG funding in Grimsby area (NUTS code UKE13), 2000 to 2006

Total investment	Public sector investment cost	Objective investment	of	Outcome
Fleet				
€ 15,261	€ 3,052	Vessel modernisation		One 19m vessel (Danish seiner) modernised
€ 8,140,006	€ 8,140,006	Scrapping		15 vessels scrapped
Non-fleet				
€ 398,856	€ 59,829	Increased processing capacity		Expansion in processing capacity for four companies
€ 223,952	€ 111,976	Innovative measures		unknown

Details of the wider investment that has taken place within and the outskirts of Grimsby are detailed in table 5. Focus has been primarily upon those sectors that are already established, with other funding and schemes addressing much more general needs, such as transport facilities.

Table 5 Public sector investment in Grimsby (NUTS code UKE13) 2003-2009

Total Euros Invested	Project Description	Date
16,380,000	Department of Transport investing in new cycling facilities at railway stations, including the creation of "cycle hubs" in London, Grimsby, Hull, Leeds, Liverpool, Scunthorpe, Sheffield and York	Sep-09

1,170,000	Ultimate Packaging acquisition of new machinery	Sep-09
8,190,000	Five Star fish expansion project	Jun-09
1,755,000	Young's Seafood refurbishment of processing factory	May-09
2,340,000	North East Lincolnshire Council has approved plans for the development of a football centre at Bradley playing fields	Mar-09
1,170,000	Acquisition of Pinneys of Scotland by The seafood company of Grimsby	Mar-09
175,500,000	North East Lincolnshire Council has approved plans from the Grimsby Institute for the development of a university centre, which will create 60 new teaching jobs	Nov-08
4,095,000	Haith's seeds relocation to the Europarc site	Jan-08
234,000,000	Total's expansion of Lindsey Oil refinery, securing 535 jobs in Grimsby	Nov-06
140,400,000	Investment in Humber ports by Associated British Ports.	Feb-06
14,040,000	Acordis passes to new management and renamed, Worldwide Fibres, 235 jobs secured	Oct-05
7,020,000	North East Lincolnshire Council approves set up of a training centre in Stallingborough by October 2005, in order to train staff for jobs in the chemical industry in the Immingham and Grimsby areas	Aug-04
3,510,000	Yorkshire Forward is assisting Soy Magic of Israel with plans to build a factory at Europarc in Grimsby to produce soya milk, yoghurts and desserts, with the creation of more than 50 jobs.	Jul-04
166,140,000	Centrica is to acquire the Killingholme gas power station near Grimsby, in order to secure its winter electricity supplies	Jun-04
17,550,000	Youngs invest in its seafood factories in Hull and Grimsby with the creation of 300 jobs	Feb-04
2,340,000	Associated British Ports is to invest in new facilities at Grimsby and Immingham, which will involve Sea-Cargo moving its container service to Immingham and Freshney Cargo Services expanding its operation at Grimsby	Apr-03
2,340,000	SeaChill; expansion at its fish processing business in Grimsby, with the creation of 50 jobs.	Nov-02
14,040,000	North East Lincolnshire Primary Care Trust has announced plans replacing doctors' surgeries with eight new health centres and seven smaller surgeries in Grimsby.	Oct-02

6. Stakeholders

Some key contacts in the Grimsby community are provided in the table below.

Table 6: Stakeholder details and contacts

Name	Organisation	Contact details
Dave Johnson	Jubilee Fishing	enquiries@jubileefishing.co.uk / 01472 341192
Martyn Boyers	Grimsby Fish Dock Enterprises Ltd	01472 350 023
Steve Norton	Grimsby Fish Merchants Association	01472 352221
Nigel Edwards	Seachill	nigeledwards@seachill.co.uk / 01472 502340
Rory Dillon	Grimsby Institute	dillonr@grimsby.ac.uk / 01472 582416
Rachael Markham	North East Lincolnshire Council	Rachael.Markham@nelincs.gov.uk / 01472 324698
Dominic Chapman	Humber Economic Partnership Ltd	DCHAPMAN@HUMBEREP.CO.UK / 01482 596781
Mike Walton	North East Lincolnshire Council	mike.walton@nelincs.gov.uk / 01472 325901
David Custance	Yorkshire Forward	David.custance@yorkshire-forward.com

7. Qualitative interpretation and analysis

7.1 Key events and drivers of change

Demographic aspects

The population of Grimsby has remained stable, there has been no major changes impacting the local population and this is reflected in the steady population numbers. As seen elsewhere in the UK there are remnants of a period of poor fertility in the 1970's, which explains proportionally lower numbers of people in the 30-40 year old age range. The elderly population of Grimsby is also a factor in its stability, as with many western European countries, the general quality of life is improving and allowing greater life expectations. There is a strong migration presence in the Yorkshire & Humber region, some immigration from Eastern European Member States, but with little effect upon the local population of Grimsby, remaining predominately white British citizens. There was strike action in 2009 at the nearby Immingham oil refinery as a result of Italian and Portuguese construction workers being brought in to work on an expansion project. However this was a result of Europe-wide competition for large construction contracts, with this being won by an Italian company that selected its own workforce.

Economic aspects (all sectors)

The change in the businesses based in the town has altered the local labour market significantly. As indicated in the history above, the population increase of the town in the 19th century was supported and accelerated by industrialisation of the fishing sector. Historically Grimsby has relied on the fishing industry, but in the 1960s and 1970s the fishers local to the area began to suffer from declining catches which significantly reduced the role of the fishing industry in the economy. Both the fish port and the commercial port were lacking investment as they were both in state ownership. These factors and the oil and economic crises of the 1970s and early 1980s meant Grimsby suffered a severe economic and employment crisis. A brief but dramatic 'Cod War' between Iceland and the UK in the 1970's, which saw British fishers excluded from Icelandic territorial waters, particularly ripe for Cod and white fish, only served to push Grimsby into further decline. With the local fishers not able to venture out to other suitably grounds or those that could, being excluded from fertile grounds, ultimately all members of the fleet experienced this decline.

With this traditional employer – and educator – now diminished unemployment has risen and remained high. This is a problem reflected in other de-industrialised towns outside of the South East. High unemployment has also driven a brain drain with young graduates and high achieving school leavers seeking tertiary education and professional employment opportunities outside the area. This has exacerbated problems such as low business creation – with potential entrepreneurial and professional skilled labour leaking from the region. Since the early 1990's there has been significant amounts of investment into Grimsby as a whole and into key industries that have allowed it to develop into its current present day status of "European Food town". Central to Grimsby's transition into the food processing industry was its strong transport links, without which it would be impossible for >70% of UK landed fish to pass through this port, and an appropriate opportunity made available to the local workforce, when it needed it most.

Yorkshire Forward has been very active in pushing for large development and investment in Grimsby based projects. It is as a result of their efforts that the Europarc site was opened and continues to be developed.

The Gross Value Added has continued to grow, although it has not been in line with national growth over the period of 1995-2007. Whereas the national GVA has doubled in that time, the North and North East Lincolnshire GVA only increased by about 50%.

In addition to sustaining food processing in the Humber region, Yorkshire Forward is now looking to the growing renewable energy generation sector for future growth. Recently it encouraged the establishment of a turbine manufacturer on the Humber estuary.

Fisheries and aquaculture aspects

The diversification in Grimsby's main industry from fisheries towards a food processing based economy has utilised the infrastructure and workforce that risked being lost if they remained dependent upon fishing alone. The most important driver has been the move from seafood capture to seafood processing as the dominant industry. This trend has been accelerated by a series of events reducing the economic viability of local fleets: the Cod Wars and the assertion of Icelandic fishing rights, the accession to the EU and entry of the UK into the CFP as well as the schemes designed to reduce over fishing capacity. Reduction of access to regional fisheries terminally reduced the competitive advantage for most of the bulk of the Grimsby fleet.

Catching sub-sector

Since the 1970's many key North Sea whitefish fisheries have been in decline, legislation has been getting tougher as calls for accountability and reduction of effort from European and national levels have reduced opportunities for the catching sector. Coupled with the flourishing processing sector in Grimsby offering much more reliable prospects, it is not surprising that the number of people retained in the catching sector has dwindled. The fleet has reduced in size and capacity significantly in recent decades as a result and has only stabilised in the last few years. A recent upturn in landings at Grimsby occurred in 2009 due to Iceland's economic crisis. Cod that was usually frozen and delivered by containerised transport was landed fresh to Grimsby market by Icelandic trawlers, seeking immediate, secure payment from UK buyers rather than dealing with struggling Icelandic buyers. While this upturn was welcomed, it was recognised as a temporary increase in foreign landings. A key factor mitigating increased unemployment due to the loss of the capture industry is the role of the local and national government in spending monies to increase the competitiveness of sectors which employ people in the area. This is explored in section 7.4.

Processing sub-sector

With the economic climate facing Grimsby in the 1960's and 1970's, there was a huge development into the types of industries that would secure a future for Grimsby's economy for many years to come. The processing sector was one of the areas of the economy identified that would provide the main backbone of Grimsby's future development. Investment into the processing sector and the most cutting edge technologies have provided Grimsby with the edge to be competitive and remain thrive. Since then, the presence of big named companies, such as Findus and Young's, in the area are helping to provide security in the local economy and provide incentives for other companies to invest in Grimsby.

Governance aspects

In the mid 1980's with Grimsby's economic situation the worse it had been for decades, the local government decided to make bold plans to target development of the food processing sector. The new leadership that the council brought in has underpinned the massive changes that have taken place in Grimsby since then and are a credit to its reversal of Grimsby's fortunes.

Grimsby falls under the management of the North Eastern Sea Fisheries Committee (SFC), which is one of the first SFC's to seek Marine Stewardship Council certification and undertake a Strategic Environmental Assessment of all inshore fishing operations. This may go some way to explain the retention and even a recent slight increase in inshore vessel numbers in Grimsby as larger vessels are decommissioned.

Grimsby, like many ports around the UK, had a problem of non-compliance with quota rules and the landing of over-quota fish, "blackfish", considered illegal landings. With fewer vessels and more effective enforcement this problem was reduced. The introduction of the Registration of Buyers and Sellers in 2006 effectively put a stop to most "blackfish" landings as a paper trail from the point of landing was established, including for inshore vessels.

7.2 Adaptation

Economic aspects (all sectors)

Given the turbulent history that Grimsby has suffered, the economy has been focused on building its strength from the ground up, looking at what key sectors contribute to the area, facilitating the businesses that will develop in those sectors and most importantly recognising the importance of the associated sectors with these industries and encouraging them to develop as a group in the area. Effectively this has led to the development of a food industry supply chain hub. It is the continued investment into Grimsby's facilities and its technologies that ensure it can remain a key figure in its respective markets, building upon its already solid reputation. The loss of dependence upon the capture industry has led to an increased focus on the importance of the processing sector. With a large proportion of the population now employed within this sector and the town re-branded as Europe's Food Town. The abundance of land and specialised labour has led to a wider focus on food manufacturer with the re-location of non-fish food processing such as the Daniels Group and Northern Foods plants.

Fisheries and aquaculture aspects

Use of Grimsby Fish Docks is now increasingly varied. The most recent dock masterplan indicates that expanded use of docklands will include development of the marina, of wind power and increased processing. Facilities for boats providing operations and maintenance are already in evidence as well as plans for upgraded processing units. The Grimsby Institute of Further and Higher Education has expanded its range of courses to meet demands from local industry for skilled labour and of young people for vocational training. It provides foundation degrees, and now degree and masters degree level qualifications. The provision of degree level training is particularly important for those who cannot afford or find it impractical to move from the area. The private and public sector have adapted to changing circumstances by diversifying away from fish capture. The area is now dominant in seafood processing – 70 % of all value added seafood consumed in the UK passes through one of the town's factories. Industries such logistics and chemicals are also important employers. Fishermen have adapted toward local and premium fisheries and supplement fishing income with non fishing services.

Catching sub-sector

The catching sector has only partly adapted to the reduced catching opportunities. To a great extent it has simply been lost from the town as vessels have been sold to other operators in other ports or decommissioned. A small proportion of those large vessel operators have continued fishing with inshore vessels, some switching from whitefish to shellfish, but most have retired or entered other industries, such as support for rigs and offshore wind turbines.

Historically it would have been common for fishers to be a single species fisher, using species specific gear, advances in technology, changes in legislation and quota restrictions for the smaller non commercial (non sector) vessels have forced fishers to diversify and become generalists and to seize every fishing opportunity possible. Those involved in the catching sector now target multiple species of fish, with multiple types of gears throughout the year, in order to ensure that catching remains viable for them. The fishers are at the mercy of the prices which they receive for their catch and will switch to more profitable species during difficult times for their main/usual catch species.

In many ways the catching sector is now a greater part of tourist and cultural identity of the town rather than a direct contributor to the economy of the town. These benefits, particularly with nearby tourist attractions such as the Deep and the National Fishing Heritage Museum, are very real and have factored in a lot of “redevelopment” plans put forward to secure the economic future of Grimsby.

Processing sub-sector

As technology and standards continually change and are raised higher, it's of vital importance for Grimsby to retain its current position in the food industry to keep up with such changes. Continuous development and investment of the latest facilities and technologies is essential for Grimsby to not only keep its current position but to grow and expand also. Through the work carried out by Yorkshire forward, the European Union and others, it looks like this will be achieved.

However adaptation has not been easy or entirely successful with high unemployment and low graduate retention still very much live problems for Grimsby. There are also lasting psychological or spiritual effects caused by this change in the ‘purpose’ or ‘role’ of the town in the collective imagination. Public perception of the town both internally and externally is still bound up with nostalgia for the boom days of fish capture. The council, industry bodies and consultants have all identified resistance to innovative or new industrial or economic strategies for development in the town. This comes in various forms including cynicism, defeatism or simply consultation fatigue i.e. ‘much discussed, nothing changed’

7.3 The future

Future trends indicate further diversification away from fishing and seafood. The area is well placed to benefit from offshore wind; the government has allocated nearby areas of the North East for wind energy development. Due to its suitable location and the presence of Siemens' Engineering who is crucially involved in the development of wind farm projects in the Grimsby area, there is a huge expectation that there will be significant benefits to the local economy in terms of money generated by these projects and for the local economy as the security of hundreds of jobs would be assured. Firms such as Yorkshire Forward, the

ABP and the Grimsby fish dock enterprises are all crucially involved in the development of these projects too. Estimates of potential employment through turbine and parts manufacturing, if concentrated in the region, are in the tens of thousands. This high absorptive capacity of the industry would impact on the town significantly.

The capture sector is likely to continue to decrease in importance, as calls for greater accountability and conservation of marine resources will bring more restrictions over how capture fisheries can be conducted.

The fish processing sector is expected to maintain or improve its position in the economy as Grimsby continues to attract big investment by firms looking to establish an entire supply side home. There are few such locations which can currently provide all the elements required by many firms involved with the food processing industry, this is one of the biggest strengths for Grimsby and consequently its workforce. The interlinked nature of the different sub sectors of the economy mean that they are diverse enough to survive on their own but close enough to flourish together, as has been seen with the petro-chemical and plastics industries which are now growing up alongside the food processing industries. Initiatives such as the establishment of the Humber Seafood Institute will lock in the competitive advantages experienced by firms in Grimsby by providing nationally recognised research and training tailor made for the sector.

The introduction of a Seafood apprenticeship (currently in development) will provide a route specifically designed for the unemployed to enter an industry which suffers from a lack of new skilled filleters.

Threats to the employment in the town include macroeconomic effects of recession and reduced government spending. The current coalition government's pledge to reduce regional economies reliance on public sector jobs will put local jobs and sources of development funding into jeopardy.

The general consensus in the public domain is that fishing is in the blood of Grimsby and always will be in some form. There is optimism with how the town is developing and anticipation on the continued development of the processing sector and its associated industries. A gripe is that there are not enough jobs for local people and that there seems to be general uncertainty surrounding how this situation will be rectified, in the current climate though this is to be expected and is common throughout the UK.

7.4 The role of public intervention in the past and in the future

The previous government experimented with limited redistribution: investing in public services, relocating civil service away from London and establishing Regional Development Agencies to stimulate economic development in the periphery.

Fisheries management is controlled by the European Union, under the Common Fisheries Policy, which is largely regarded as not fit for purpose within the fishing and seafood community, especially on the issue of discards. There are still many incentives still push to fishermen exiting the market. It is hoped by many that the current CFP reform will redress the discrimination that has existed towards the smaller and typically more inshore vessels, and promote the more sustainable fishing methods that the inshore fishers can offer. Public investment into the fishing fleet has allowed those fishers involved to economise, usually through decommissioning a previous vessel and buying a smaller but arguably equally if not more powerful new vessel. These kind of investments have made little impact upon the fishing sector as a whole, they have enabled local fishers to remain active, which is crucial

for Grimsby given its heritage, however this kind of investment is not sufficient to promote a strong attractiveness of this sector given the town's current economic dependence.

The local government has been criticised in the past for wasteful spending. However, in recent years, with a change of administration, local spending is viewed more favourably. In 2006, the North East Lincolnshire Council set out its economic strategy. This plan of action included several initiatives related to the seafood industry and particularly seafood processing. These included the development of a; Seafood Park for processors; the construction of the Humber Seafood Institute (HSI); the operation of the Humber Seafood Exchange (HSE); establishing a Seafood Academy programme; development of an aquaculture site and an expansion of the Europarc site.

Of these two have already been delivered and two are in the process of being developed. The HSI is now built and the Grimsby Institute and the Seafish authority have relocated into the building. This accessible research institute will strengthen the processing cluster and increase incentives to remain in the area. The HSE concept has become the perishables hub at Humberside airport. The Seafood village have a series of new processing units awaiting planning permission and a Seafood Apprenticeship course is in development. The aquaculture vision has not come to fruition and the Europarc site is yet to be expanded.

With the resources available the council has made a very serious attempt of delivering its regeneration strategy.

7.5 Conclusion

The town still sees itself as linked to fish and fishing, this is a strong link that is unlikely to be forgotten or relinquished in the foreseeable future. The economic situation in Grimsby is improving and gaining strength as the town and region continues to attract large investments. Grimsby can be regarded a success with the adaptation to a changed economic landscape. There are still pieces of Grimsby's activities that need refining, such as catering for younger generations to retain a large and broad skill base work force, but steps are being made to ensure this will happen. The redevelopment of the town centre along with the continued redevelopment of much of fish processing sector will ensure that local population retains its link with fish & fishing heritage, and that the title of "Europe's food town" is well deserved.