#FSF2020

#ScotlandsPopulations

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The Scottish Seafood Industry & Migration Policy

Rannvá Danielsen

February 5, 2020

Fire Starter Festival
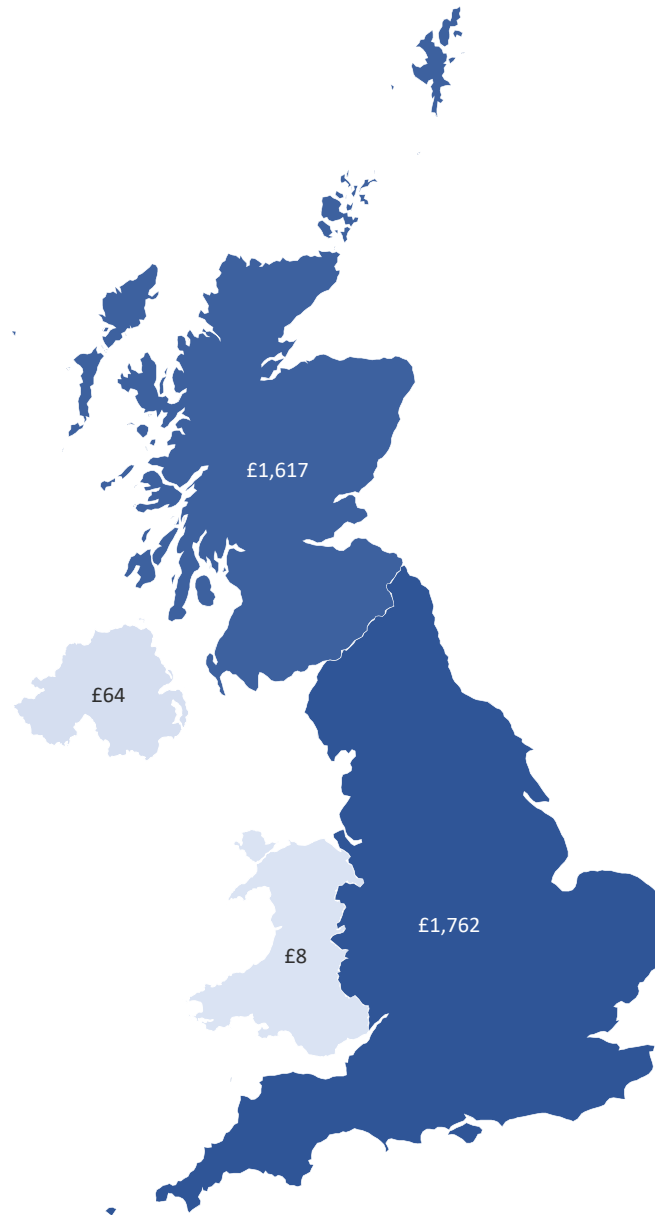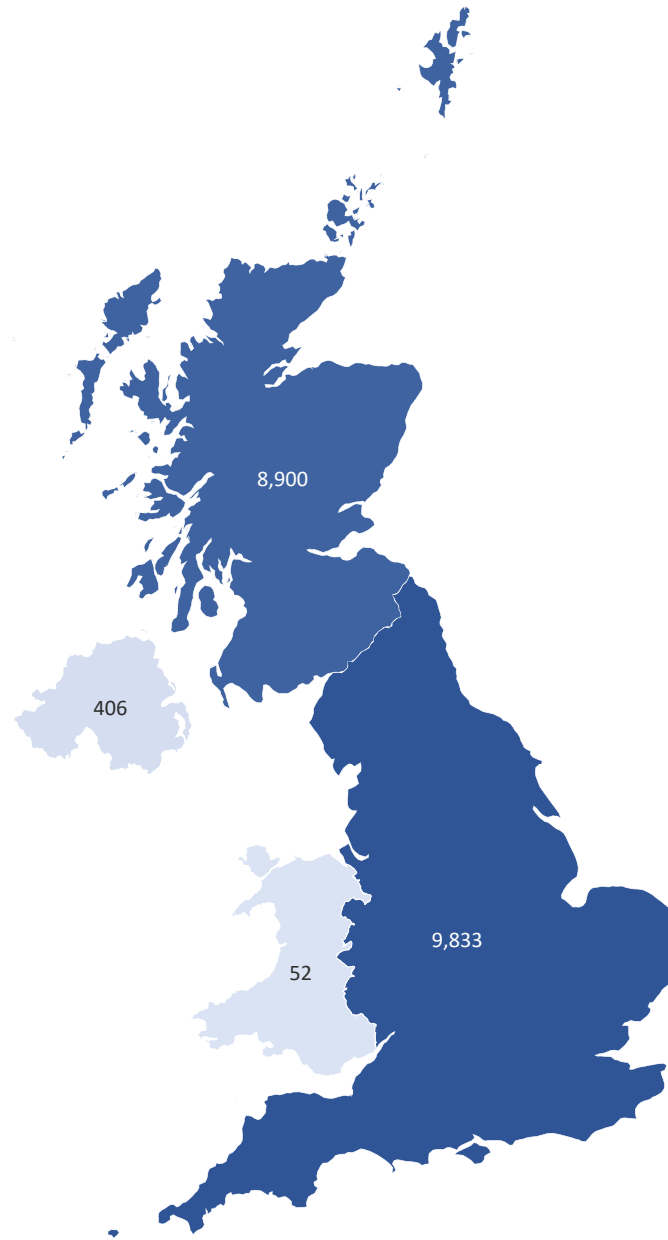
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Processing sector
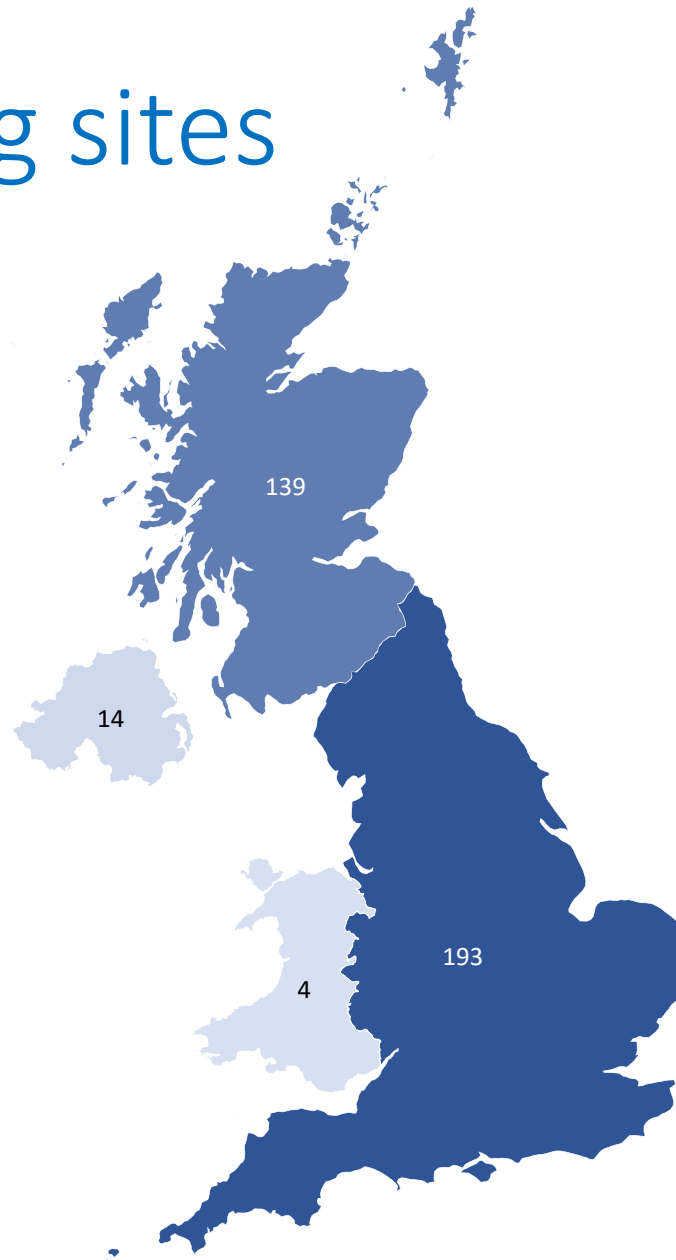
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Turnover

Total turnover
£3.4bn

£1,617

£64

£8

£1,762

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Jobs

Almost 19,200 jobs in total

8,900

406

52

9,833

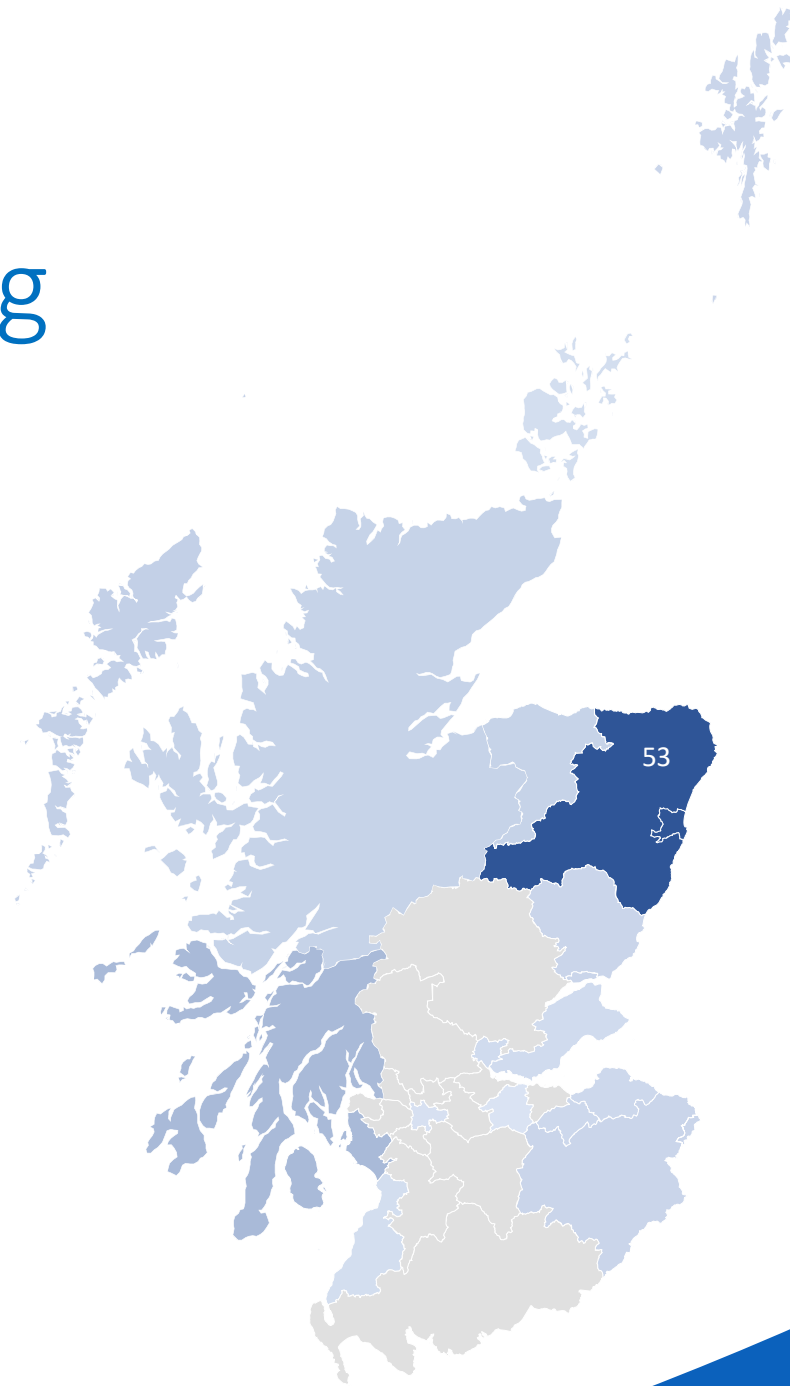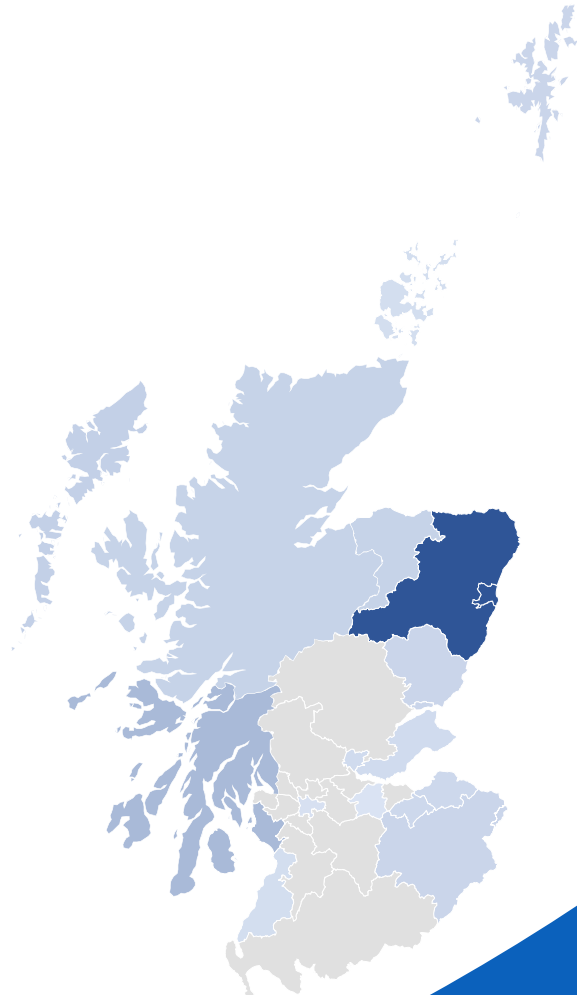seafish

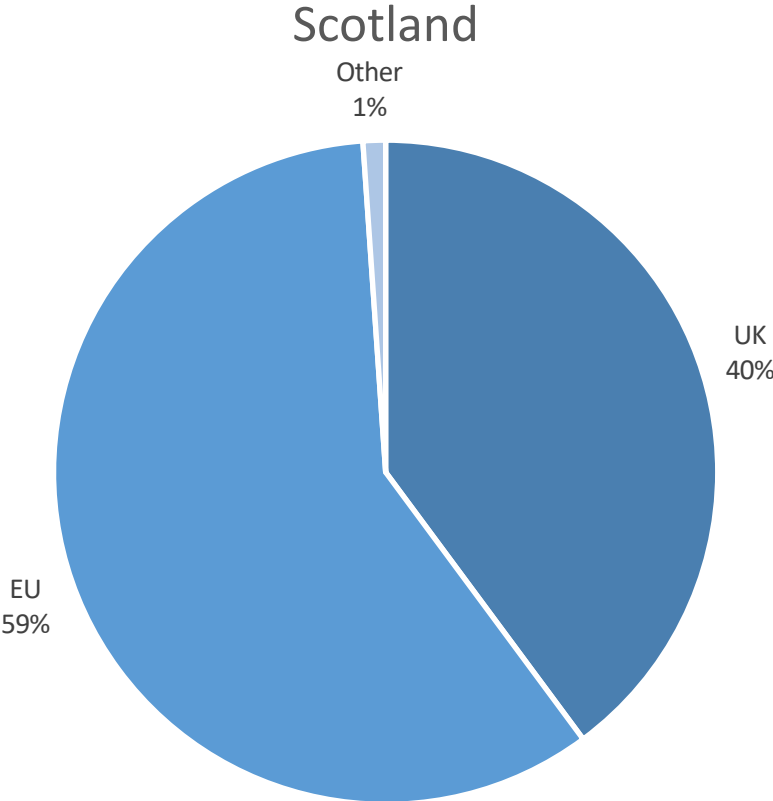# Processing sites

353
sites in UK

139

14

4

193

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Scottish processing sector

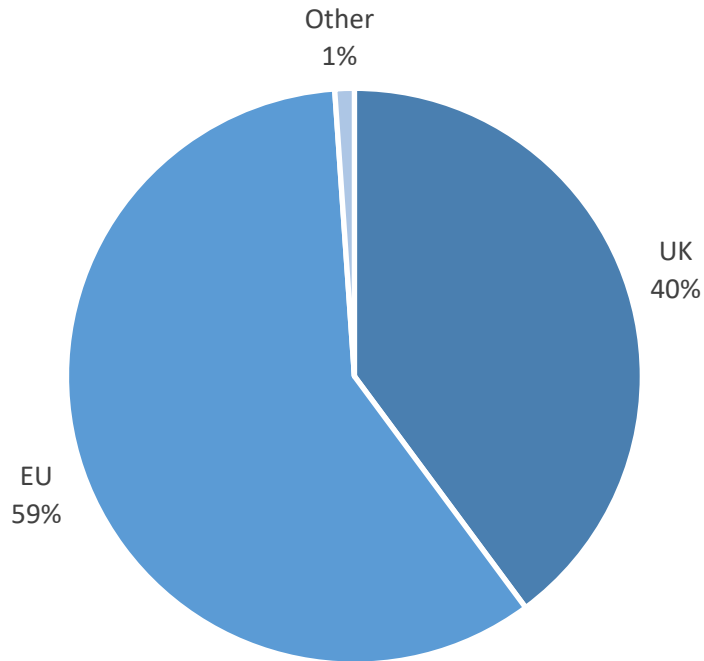Sites are concentrated in Aberdeen area

About 40% of Scottish processors

53

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Workforce nationality

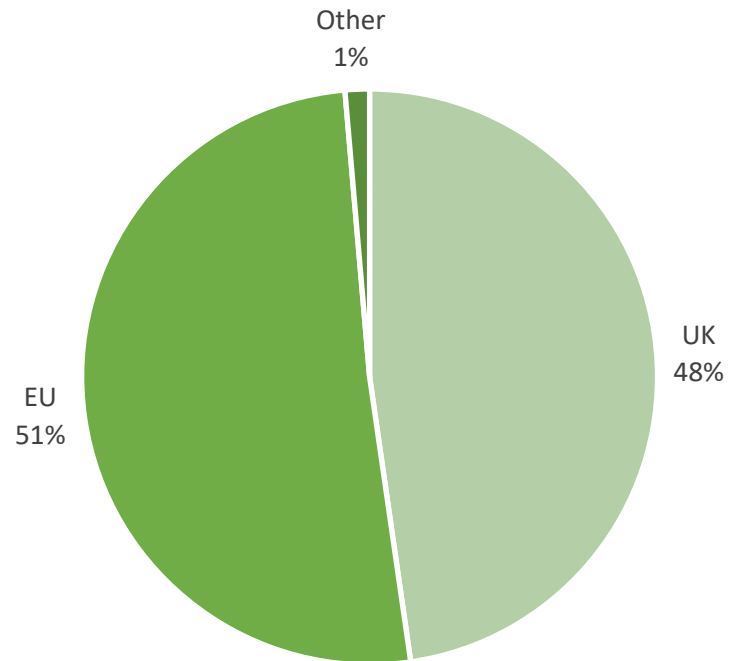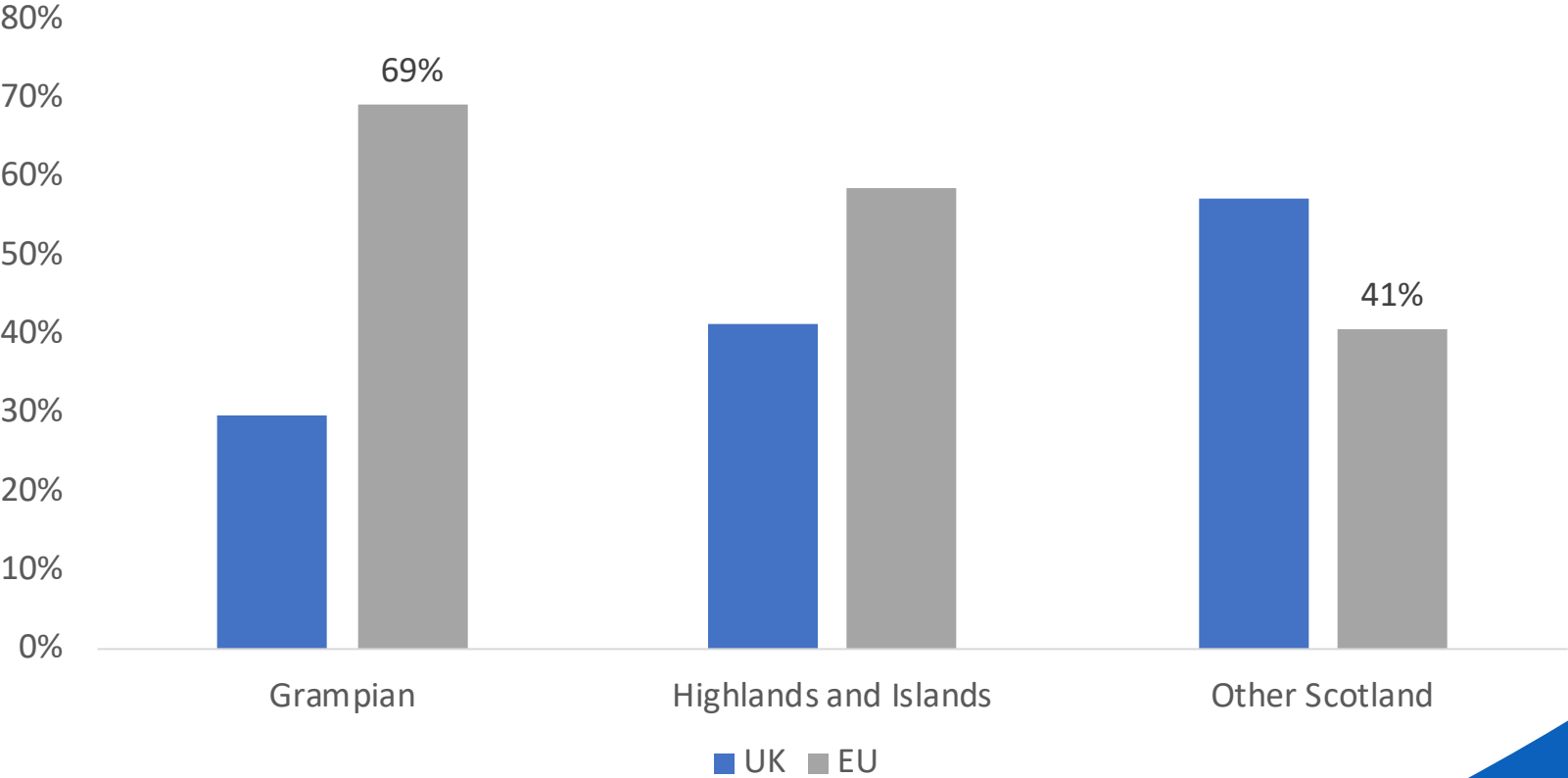# Workforce nationality

Scotland
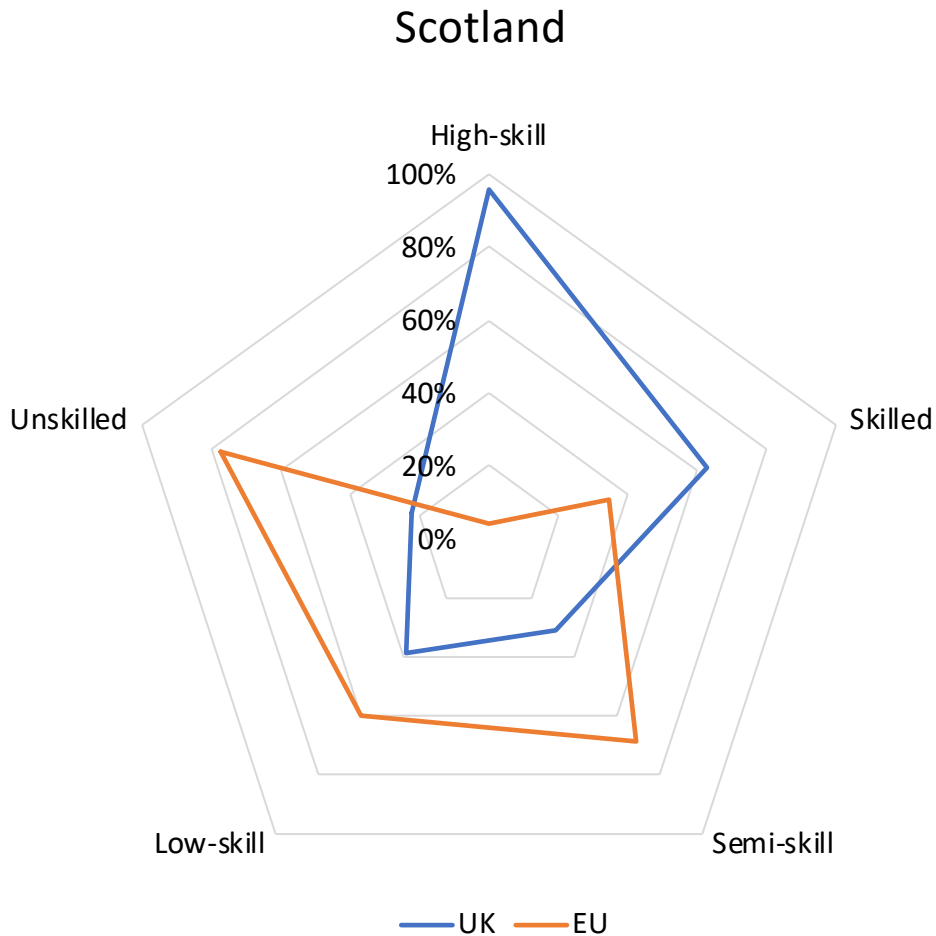
Other
1%

UK
40%

EU
59%

UK

Other
1%

EU
51%

UK
48%

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Workforce nationality across Scotland

Chart showing workforce nationality (UK vs EU percentages) across three regions:

Region	UK	EU
Grampian	~30%	69%
Highlands and Islands	~41%	~58%
Other Scotland	~57%	41%

Legend: ■ UK ■ EU

Nationality and skills

Scotland
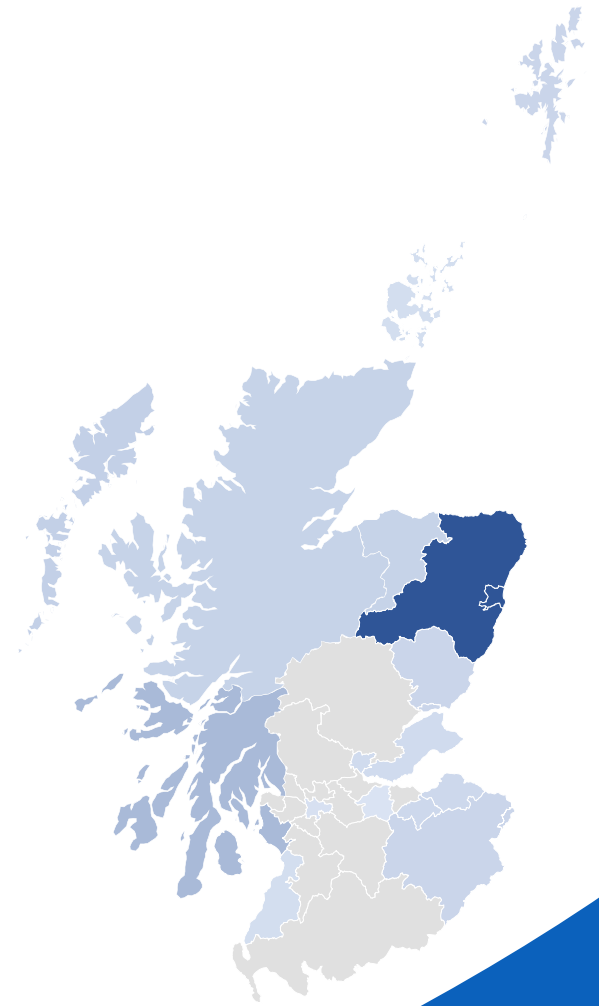
EU workers make up:

- 77% of unskilled positions

- 69% of semi-skilled positions

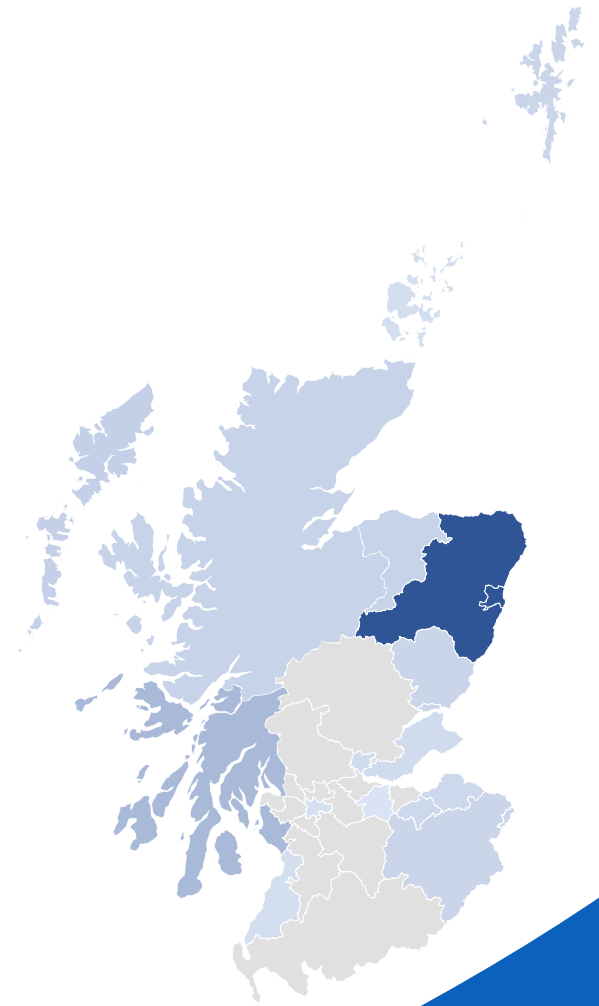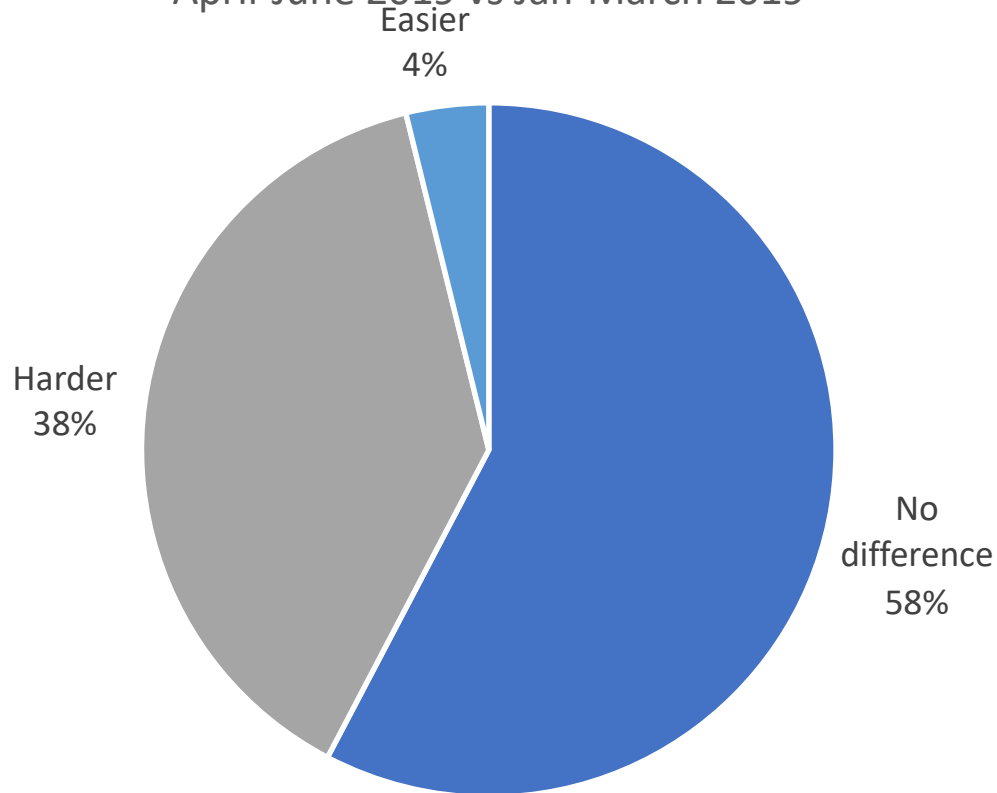- Only 4% of high-skilled positions

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The impact of Brexit?

"The business would incur serious problems if the EU-exit had a negative impact on labour availability as the business is hugely reliant on foreign workers."
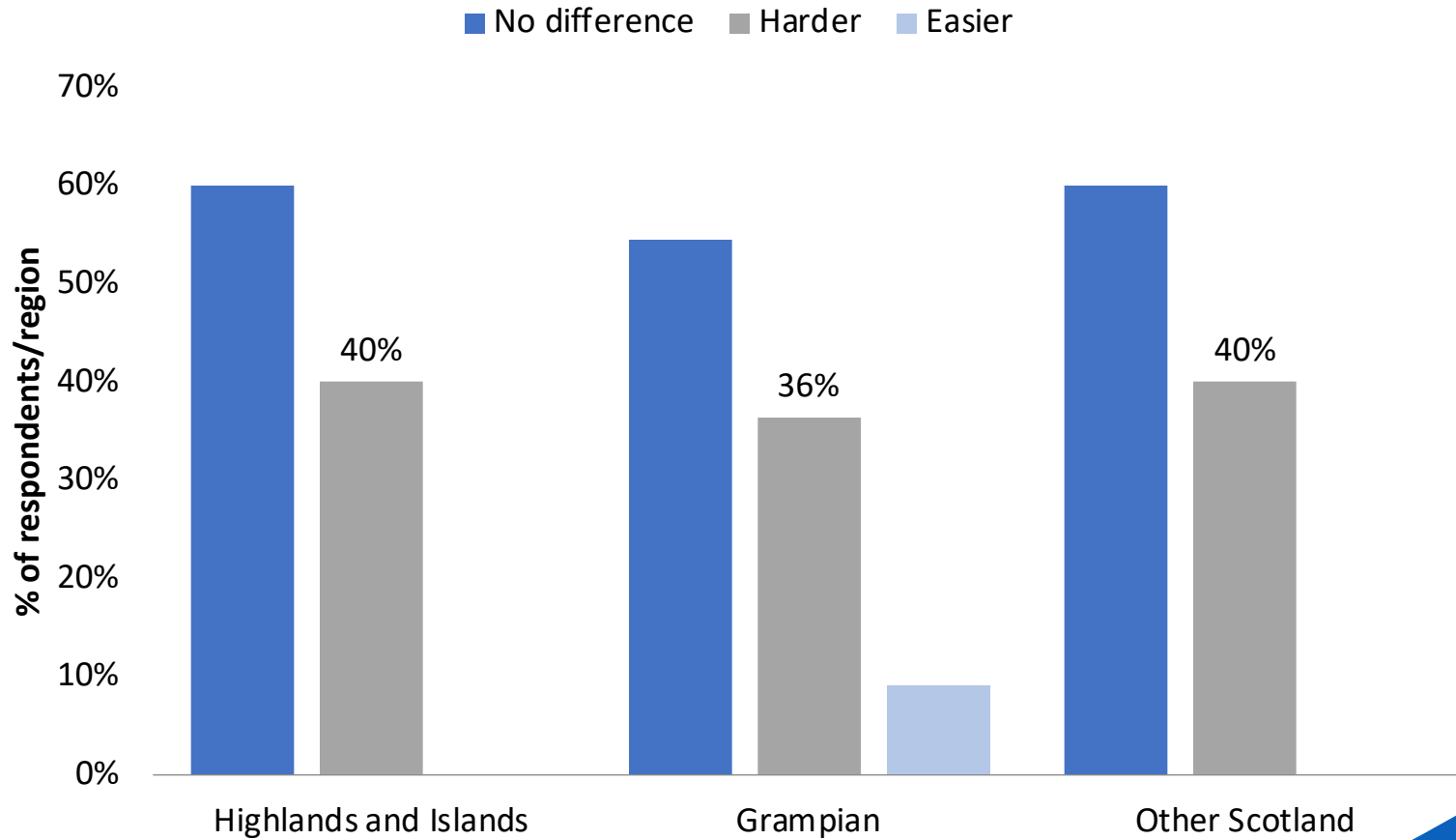
– Processor in Grampian

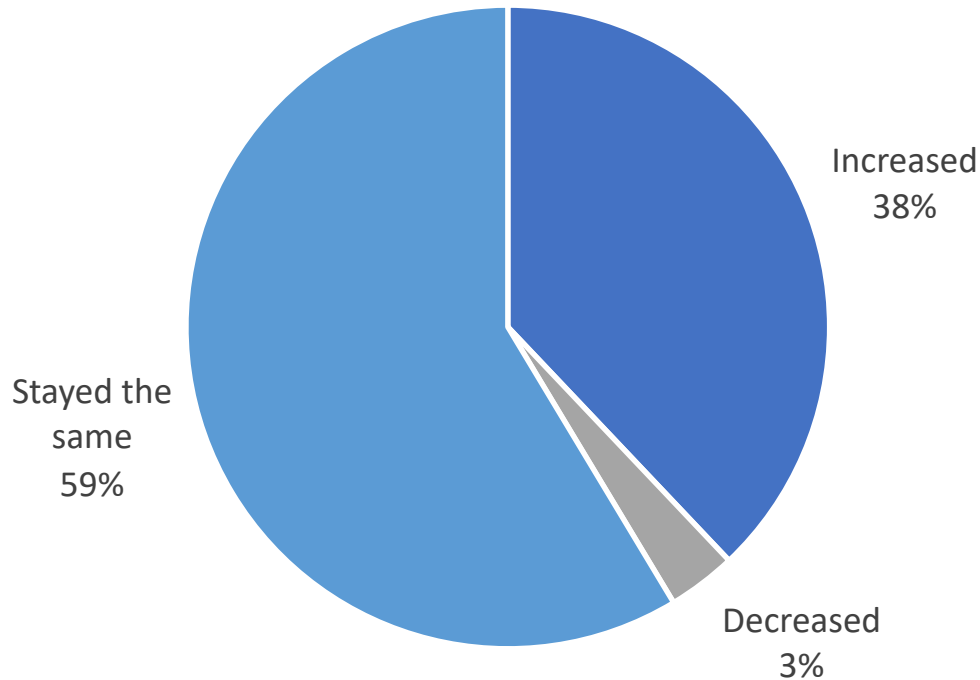seafish

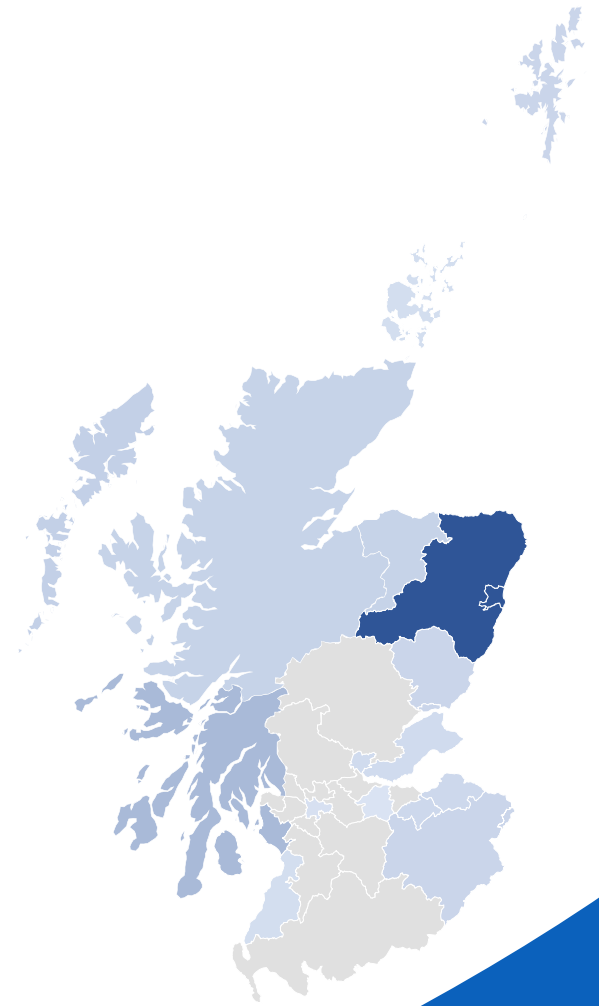# Ease of recruitment

April-June 2019 vs Jan-March 2019

Easier
4%

Harder
38%

No
difference
58%

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Ease of recruitment

Time to fill vacancies

April-June 2019 vs Jan-March 2019

Increased
38%

Stayed the
same
59%

Decreased
3%

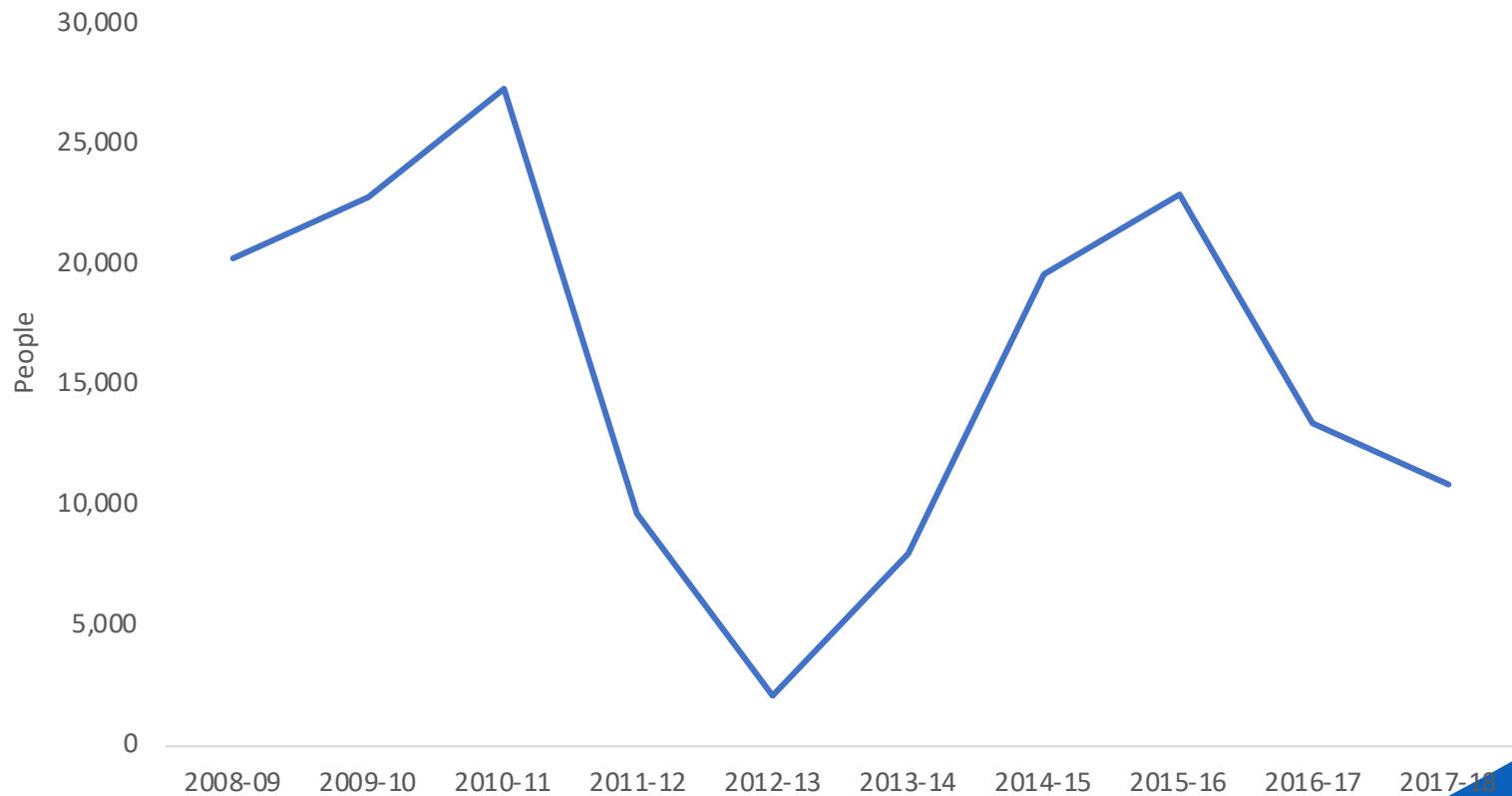83% of advertised positions were filled in the period
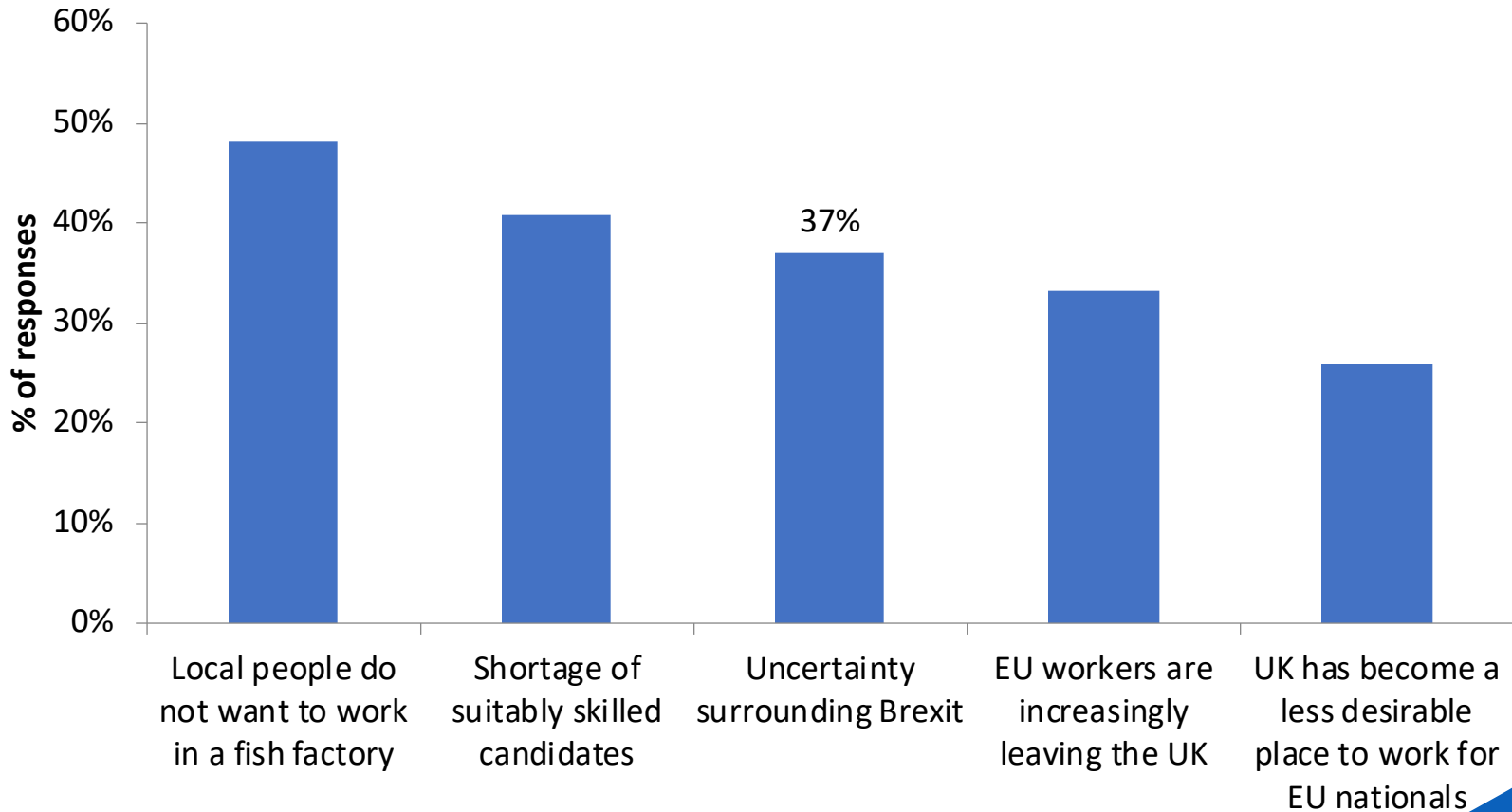
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Time to fill vacancies
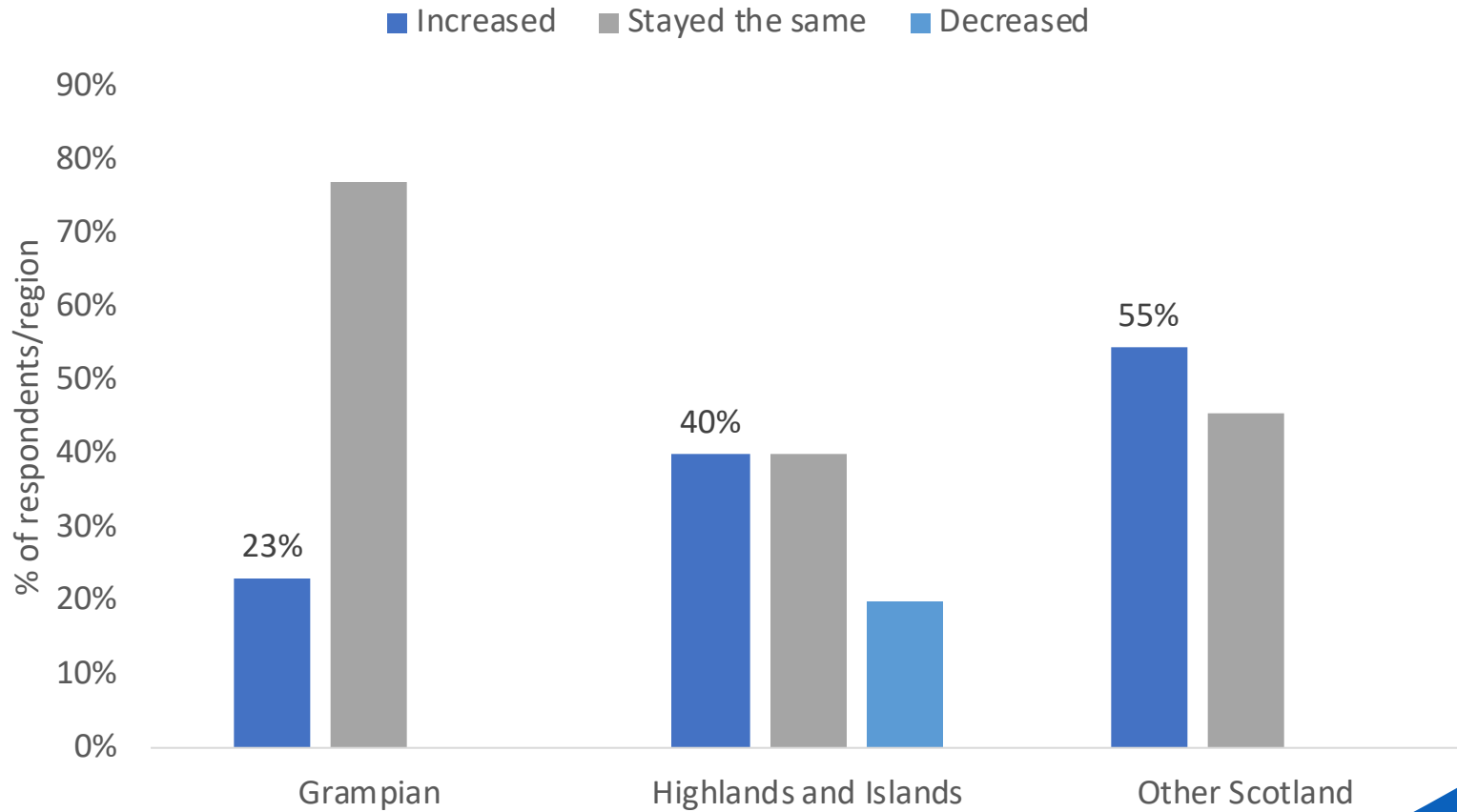
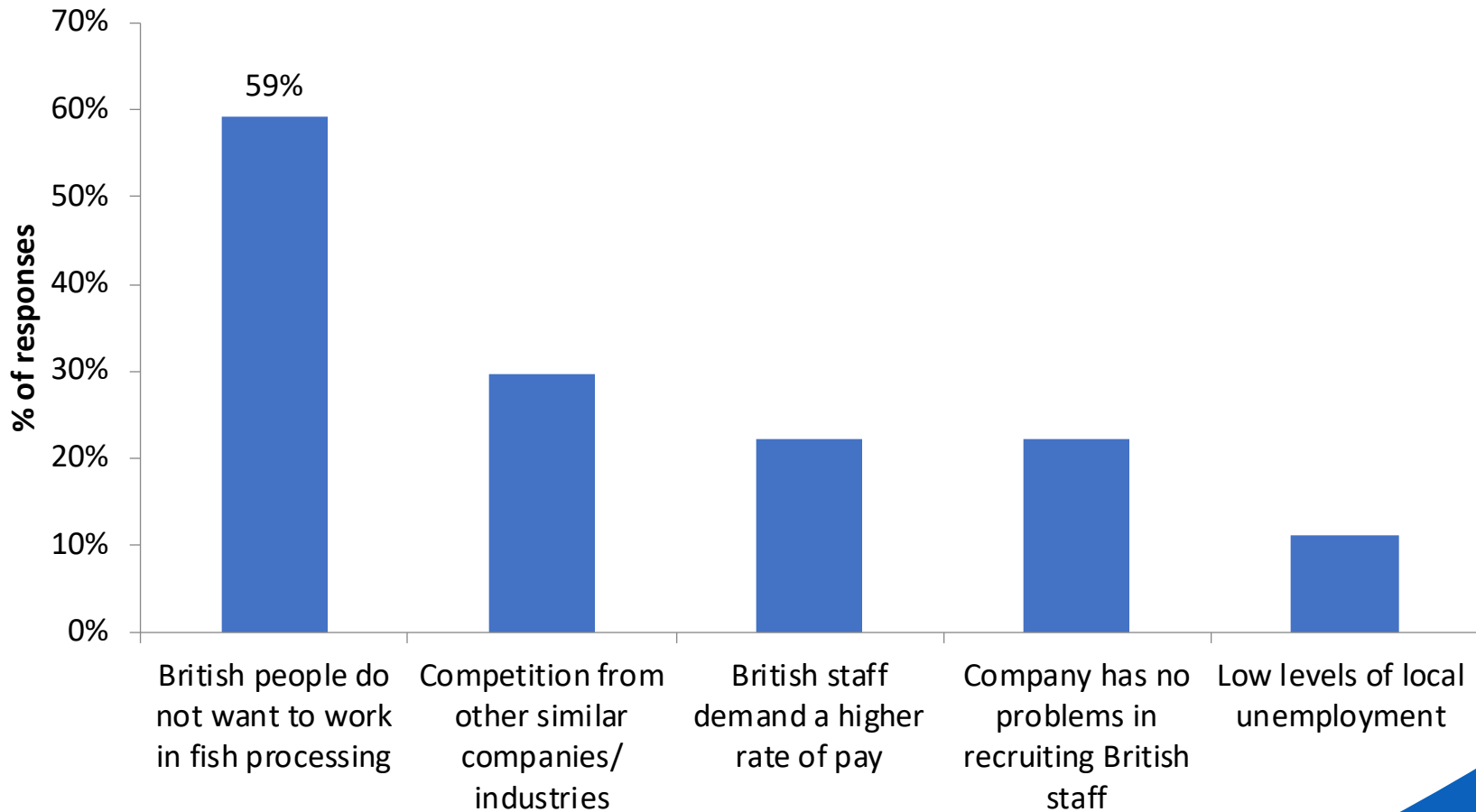# Net migration

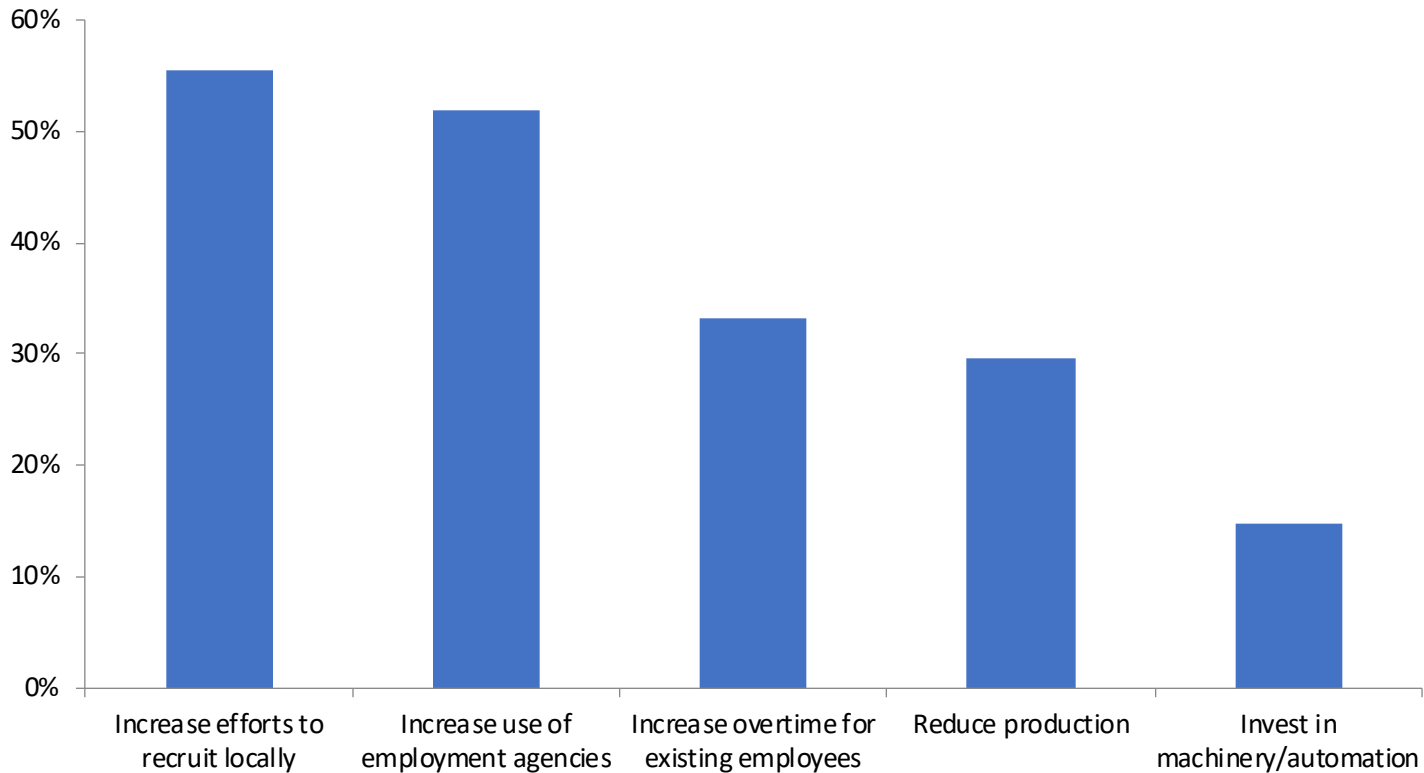## Overseas to Scotland

Source: NRS

Factors affecting recruitment

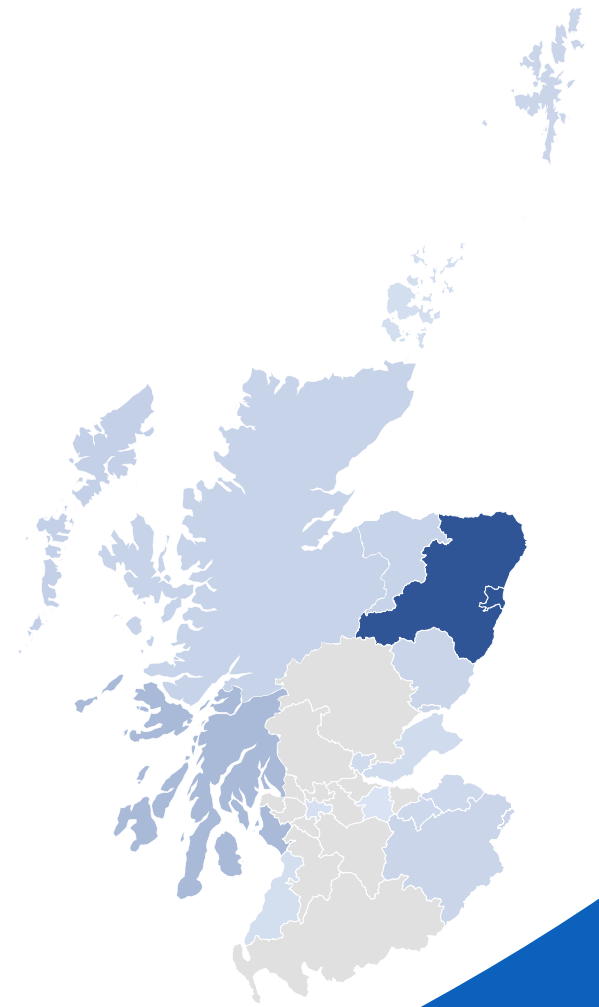# Barriers for recruiting British staff

Adaptation strategies
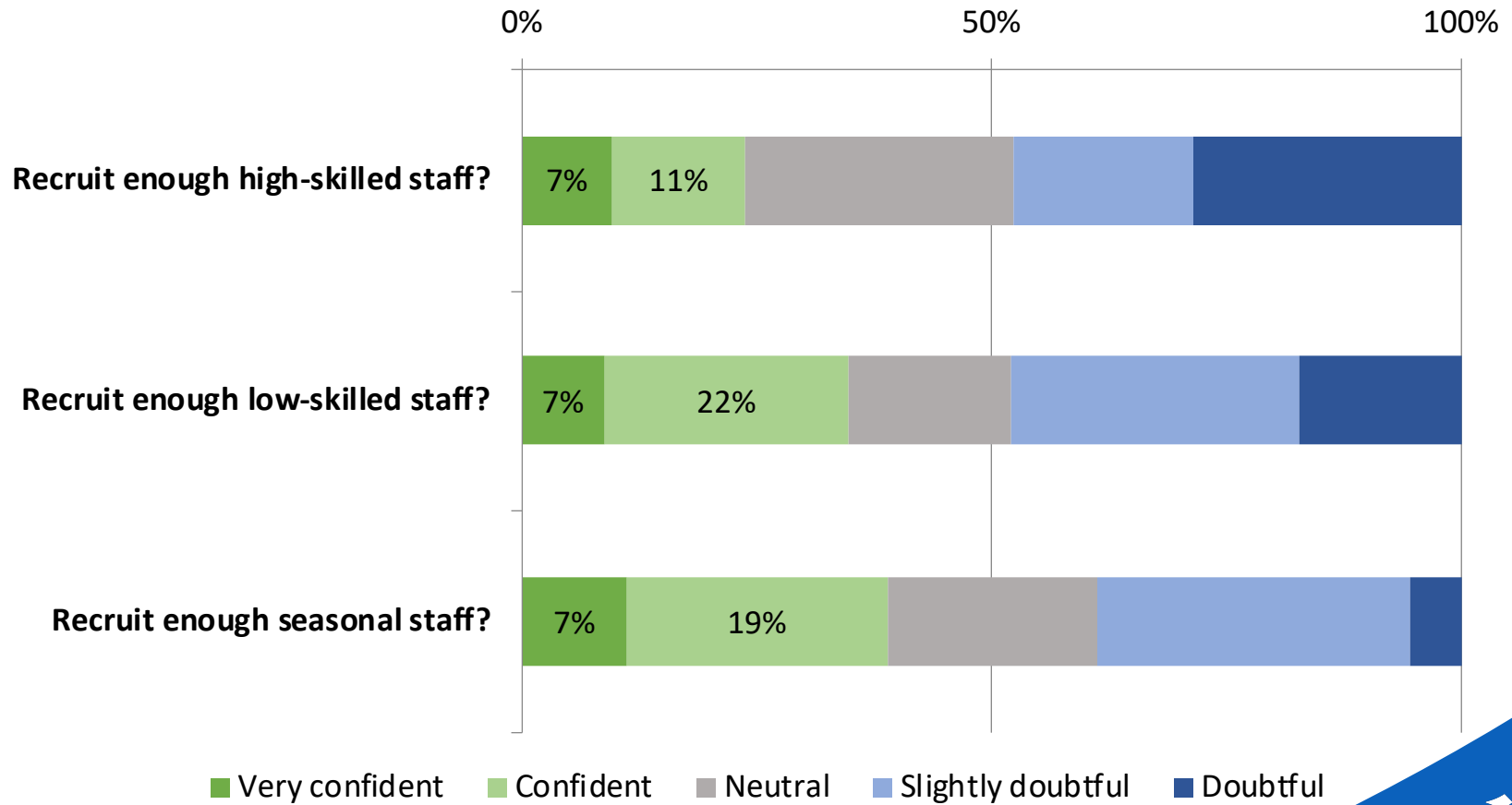
The labour challenge

- Typically low-paying jobs
  - £7.50-9.00/hour
- Work is often cold and wet
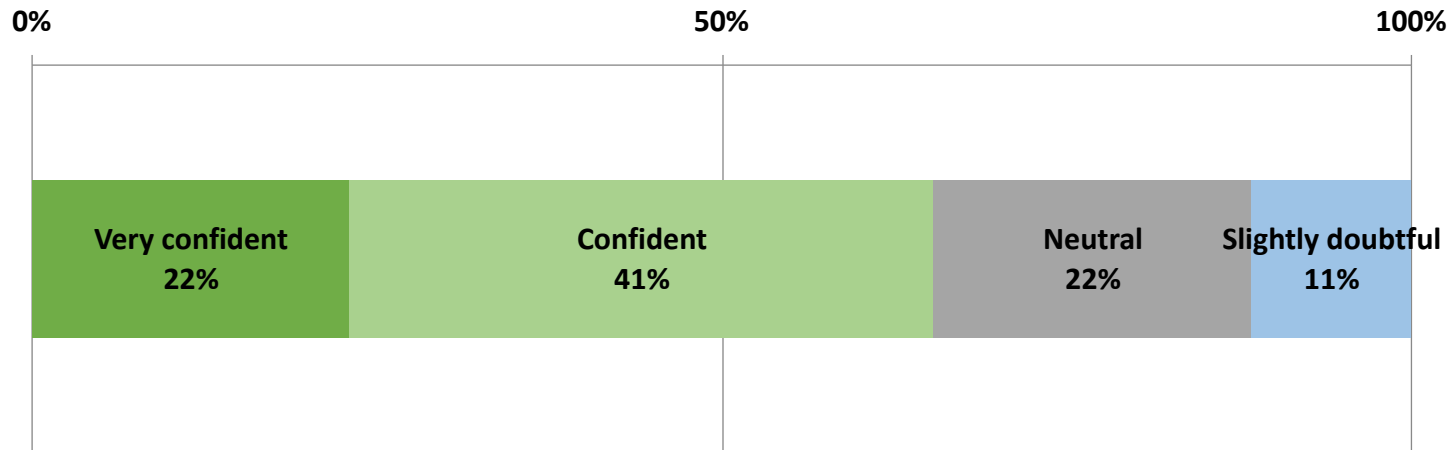
"It is just hard to get young local people involved."

– Processor in Other Scotland

Processors' confidence in their ability to recruit staff

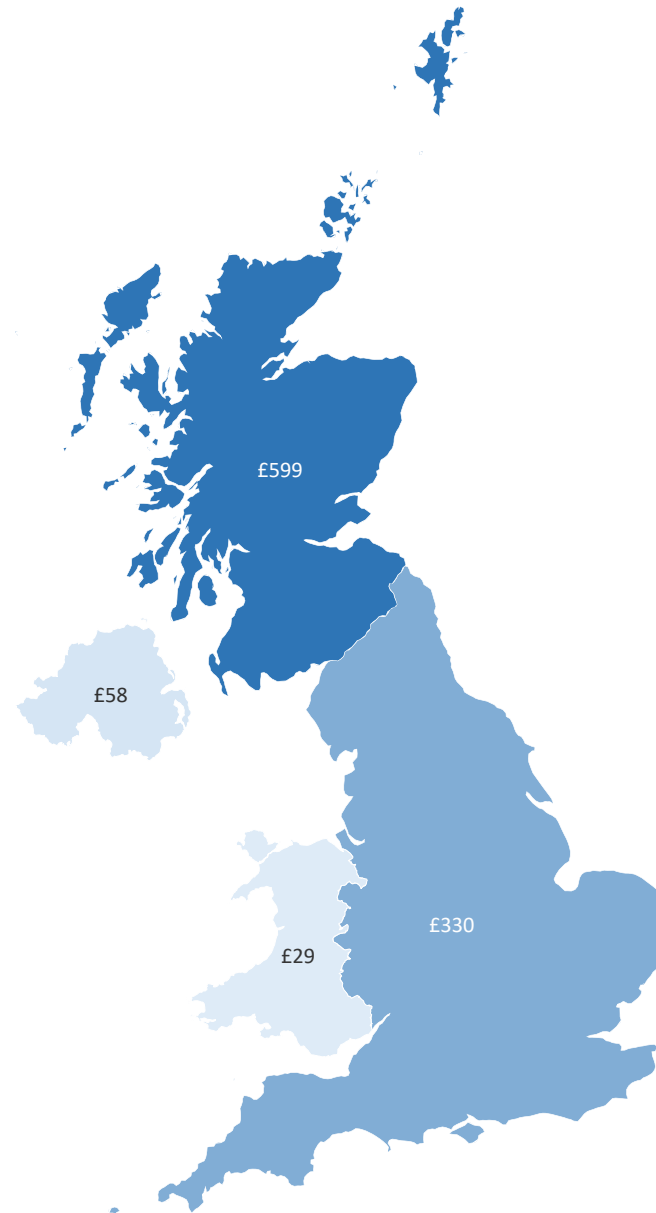# Processors' confidence in meeting planned levels of production

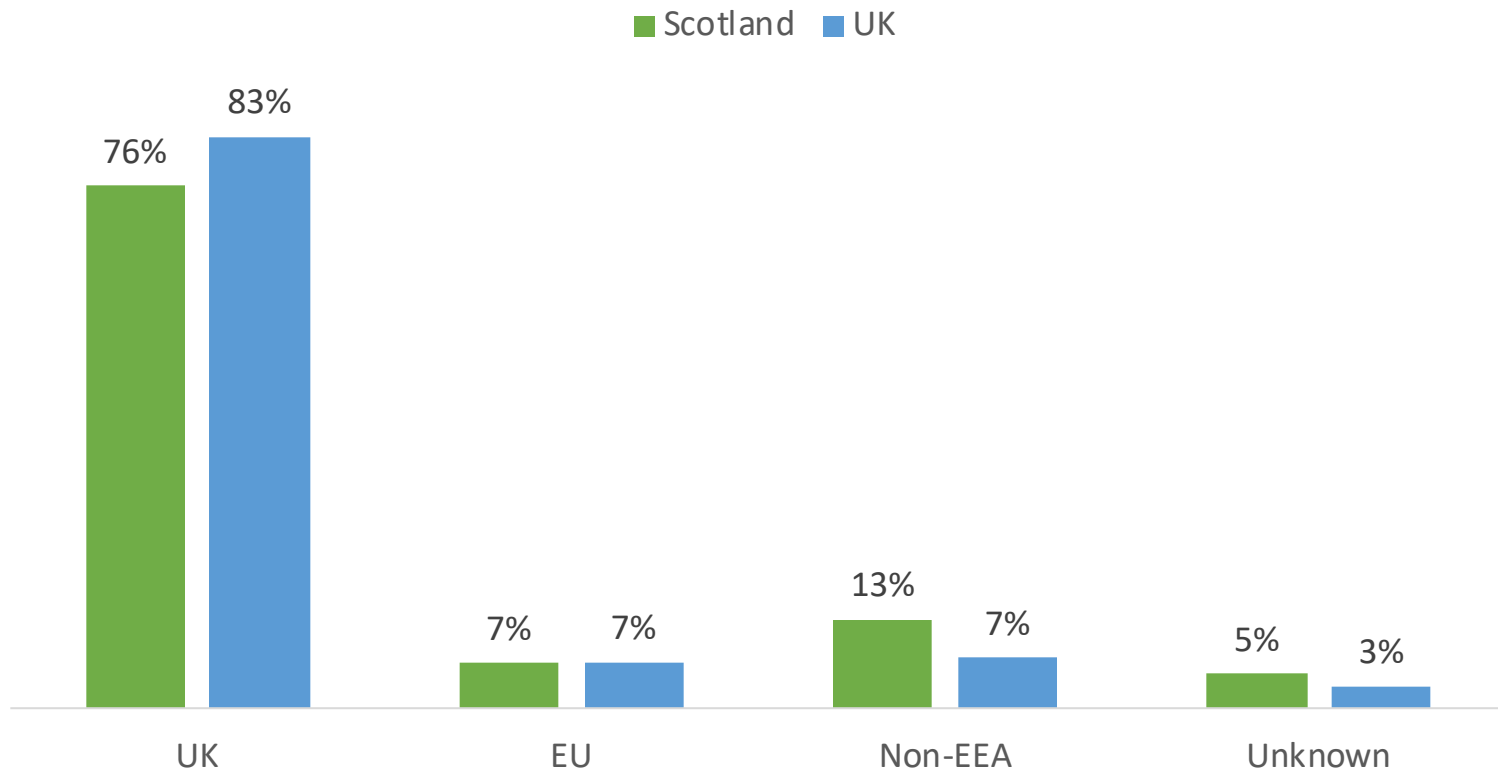| 0%	50%	100%

Very confident 22% | Confident 41% | Neutral 22% | Slightly doubtful 11%

Catching sector

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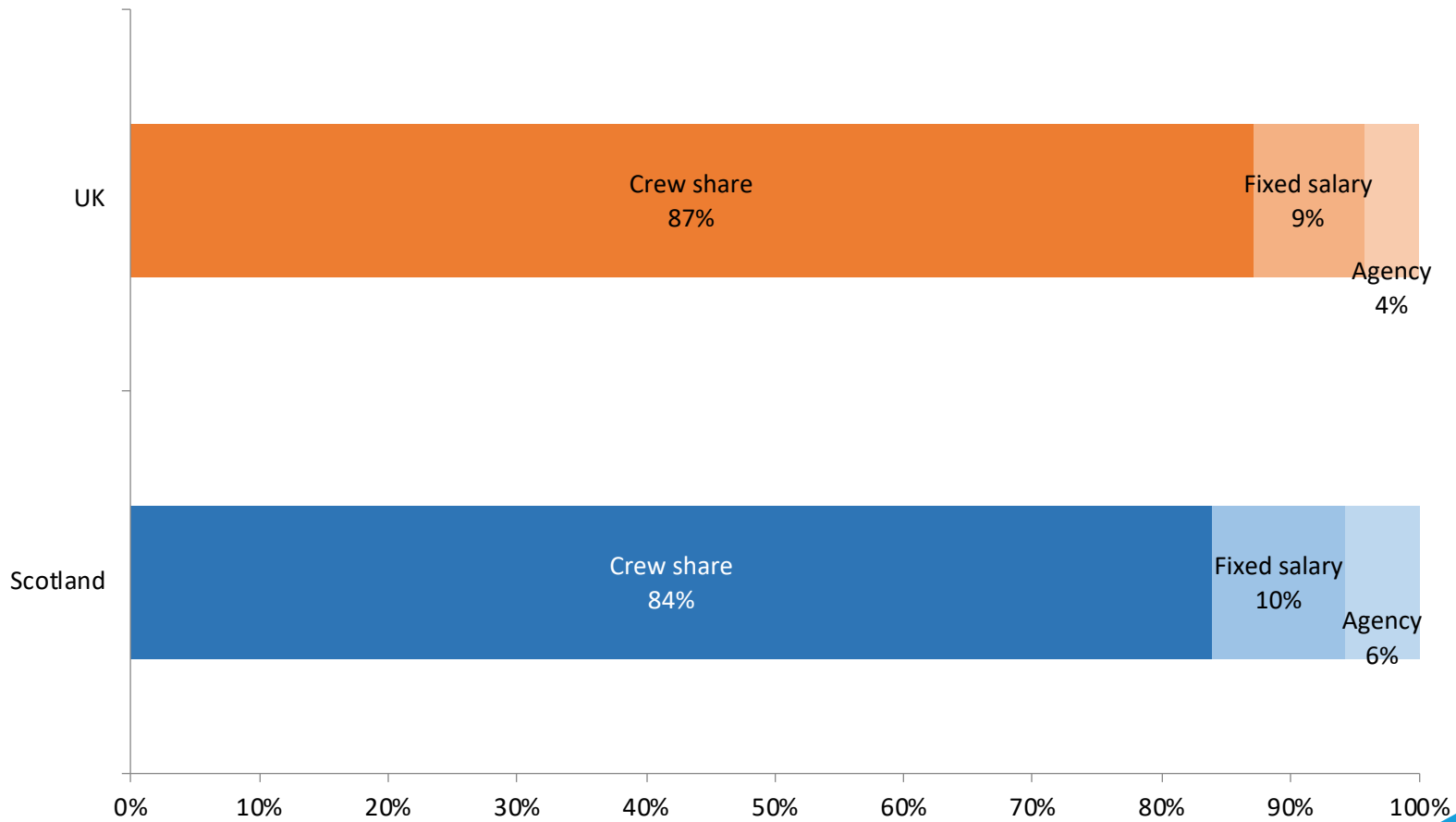
Turnover

Total turnover
£1bn

£599

£58

£29

£330

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Workforce nationality

Remuneration methods

Challenges for industry

- Vessels that operate outside the territorial sea (12nm) can recruit non-EEA labour
  - An unfair competitive advantage for vessels operating outside 12nm
  - Non-EEA workers typically earn less
- Scotland has more non-EEA workers than rest of UK
  - … and fewer people on crew share system
- Future immigration policy should to be fair and transparent

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Thank you

Rannvá Danielsen
Economist

rannva.danielsen@seafish.co.uk
Seafish.org

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