

Maritime Resources

8. Maritime Resources

- **Details:** Scotland controls 62% of the UK's maritime area, including territorial waters and exclusive economic zones. This supports fishing, offshore energy, shipping, and tourism. Ports like Aberdeen and Greenock handle global trade, while maritime areas are critical for renewable energy projects.
 - **Economic Significance:** Maritime resources drive economic activity in coastal regions and position Scotland as a maritime hub.
 - **Locations:**
 - **Aberdeen:** Major port for oil, gas, and renewable energy logistics.
 - **Glasgow/Greenock:** Clyde ports handle cruise ships, freight, and naval logistics.
 - **Orkney:** Scapa Flow is a historic and current maritime hub.
 - **Shetland:** Lerwick supports fishing and offshore industries.
 - **Firth of Forth:** Leith and Rosyth are key for trade and shipbuilding.
-

Claim: Scotland controls 62% of the UK's maritime area, supporting fishing, shipping, and tourism. Key areas include Glasgow, Greenock, and the Firth of Forth.

Verification:

- The 62% figure is plausible, given Scotland's extensive coastline and exclusive economic zone.
- Glasgow, Greenock, and the Firth of Forth are major maritime hubs, supporting trade, shipping, and renewable energy logistics.
- In 2019, Scottish marine sectors (excluding offshore renewables and oil & gas) generated £5 billion in Gross Value Added (GVA), accounting for 3.4% of the Scottish economy. While fishing and aquaculture have seen success, other sectors have experienced a decline in GVA. In 2021, fishing generated £321 million GVA, while shipbuilding generated £403 million in 2022.
- **Fishing:** Fishing generated £321 million GVA in 2021.
- **Shipbuilding:** Shipbuilding generated £403 million GVA in 2022.
- **Tourism:** In 2016, visitors to Scotland spent £9.7 billion.
- **Glasgow's Tourism:** Visitors spent £2.35 billion in Glasgow in 2023, a significant increase from 2022.
- **Business Owners:** The Scottish government uses a system of quota allocation for fishing businesses.
- **Exports:** In 2019, Scotland's international and rest-of-UK exports (excluding oil & gas) totaled £87.1 billion.
- **Sailing Tourism:** Scotland's sailing tourism economy is worth £130 million and supports 2,700 jobs.
- **Marine Tourism:** Marine tourism GVA increased by 28% from 2008 to 2017.
- Scotland's Blue Economy: current status review [Scotland's Blue Economy: current status review - gov.scot](#)

Maritime Services: The maritime services sector in Scotland is estimated to have supported over 75,200 jobs and contributed £3.8 billion to the economy. [The economic impact of the UK Maritime Services Sector in Scotland](#).

1 Executive summary

The Scottish maritime services sector has a significant economic impact...

...it directly employed 41,600 workers in Scotland...

- In 2011, the maritime services sector employed an estimated 41,600 people in Scotland. Nearly two-thirds of these were in the ports industry, with the majority of the remainder employed by the shipping industry.
- Approximately one in every four people employed by the maritime services sector in the UK was based in Scotland in 2011. As such, there were nearly twice as many people employed in Scotland than in any of the UK's other countries or regions.

...contributed £2.2 billion to Scottish GDP...

- It is estimated that the maritime services sector contributed over £2.2 billion to the Scottish economy in 2011, accounting for an estimated 2.0% of the country's total economic output.
- The maritime services sector in Scotland is highly productive. The average level of productivity in the sector (in terms of GVA per person employed) was over £53,500 in 2011, around 10% higher than the UK economy-wide average and as much as 25% higher than the Scottish whole economy average.

...and generated £651 million in tax revenue for the Exchequer ...

- These activities are estimated to have generated over £651 million in tax revenue for the government, through a combination of corporation tax on company profits, employee income and NICs, and other indirect taxes such as VAT and council tax.

Business Ownership:

- Maritime activities involve a mix of local, UK, and international firms. Ports are often publicly managed (e.g., by local authorities), but shipping and logistics firms like Maersk (Danish) operate heavily in the region.
- Devolution has allowed Scotland to prioritize its maritime sector, but global trade dynamics dictate ownership.

2019: Economic Contribution: The UK maritime services sector in Scotland generated £3.9 billion in turnover, £1.7 billion in Gross Value Added (GVA), and supported 29,000 jobs (direct, indirect, and induced impacts). This includes activities like shipping, ports, and maritime business services.

Export Revenue: The sector contributed £1.2 billion in export revenues.

Sub-Sectors: Shipping: Generated £1 billion in turnover, £400 million in GVA, and supported 5,700 jobs. **Ports:** Generated £1.1 billion in turnover, £600 million in GVA, and supported 11,300 jobs. **Maritime Business Services:** Generated £1.8 billion in turnover, £700 million in GVA, and supported 12,000 jobs.

2022 Data (Marine Economy Overall): The Scottish marine economy (which includes maritime services, fishing, aquaculture, and more) generated £4.9 billion in approximate GVA (aGVA) and employed 71,000 people. Support for oil and gas contributed 44% of the aGVA (£2.16 billion), while marine tourism provided 44% of employment (31,240 jobs).

Maritime Services Subset (Estimated for 2025): The 2019 report's maritime services (shipping, ports, business services) are a subset of this broader marine economy. In 2022, the marine economy's aGVA fell 14% from 2013, and employment dropped 3%. Assuming a modest recovery by 2025 (aligned with the image's emphasis on economic significance and renewable energy growth), the maritime services sector might have stabilized or slightly grown.

Turnover: The 2019 report's £3.9 billion turnover could have increased to around £4.2–4.5 billion by 2025, factoring in inflation and growth in offshore wind logistics (noted in the image under "Renewable Energy" and "Maritime Resources").

GVA: The 2019 GVA of £1.7 billion might have risen to £1.8–2 billion, reflecting a focus on high-value activities like green shipping and port support for renewables.

Employment: The 29,000 jobs in 2019 could have grown to 30,000–32,000 by 2025, driven by renewable energy projects (e.g., offshore wind in Aberdeen, Orkney) and naval shipbuilding (7,000 jobs directly from shipbuilding per the image).

Export Revenue: The 2019 export revenue of £1.2 billion might have increased to £1.3–1.5 billion, though economic uncertainty (noted in web ID: 5, Scottish Enterprise's 2025 economic trends) and reduced demand for exports like whisky could temper growth.

Key Comparisons and Trends (2019 vs. 2025)

Economic Contribution: 2019: £1.7 billion GVA from maritime services alone. 2025 (Estimated): £1.8–2 billion GVA for maritime services, within a broader marine economy of ~£5 billion aGVA (based on 2022's £4.9 billion adjusted for growth). The broader marine economy's GVA aligns with web ID: 6 (2023), which notes £5 billion in 2019, suggesting stagnation or slight growth by 2025 due to economic challenges (web ID: 5 notes Scotland's GDP growth forecast at 0.9% for 2025). The maritime services sector's GVA growth is modest, reflecting global economic fragility, Brexit impacts, and a shift toward renewables (e.g., ports supporting offshore wind, as noted in the image).

Employment: 2019: 29,000 jobs in maritime services. 2025 (Estimated): 30,000–32,000 jobs in maritime services, with shipbuilding contributing 7,000 (per the image). The broader marine economy employed 71,000 in 2022, likely similar or slightly higher in 2025. Employment growth is driven by renewable energy logistics and naval contracts, though the 3% decline from 2013–2022 (web ID: 8) suggests structural shifts (e.g., more part-time jobs in tourism, fewer full-time in oil and gas support).

Export Revenue: 2019: £1.2 billion in exports from maritime services. 2025 (Estimated): £1.3–1.5 billion, though web ID: 5 notes reduced export demand (e.g., for whisky) and economic uncertainty (e.g., US tariffs, inflation at 2.6% in 2025). Export growth is likely tempered by global economic challenges, though maritime support for renewables (e.g., offshore wind supply chains) may offset some losses.

Sectoral Shifts and Ownership: 2019: The report emphasises traditional maritime services (shipping, ports) with growth potential in green shipping. Ownership includes trust, municipal, and private ports (web ID: 7), with global firms like Maersk involved in shipping. 2025: The

image highlights a broader role for maritime resources, including support for renewables (e.g., Aberdeen's role in offshore wind). Shipbuilding remains focused on naval vessels, with BAE Systems (UK multinational) and Ferguson Marine (Scottish Government-owned since 2019) as key players. Since devolution, the Scottish Government has increased public ownership in some areas (e.g., Ferguson Marine), but global firms still dominate shipping and logistics. The shift toward renewables (noted in the image and web ID: 11) has diversified the sector, though foreign ownership in related areas (e.g., oil and gas, as per the Common Wealth article) suggests limited local control over profits.

Challenges and Opportunities: 2019: The report notes Brexit and global competition as challenges, with opportunities in green shipping and digitalisation. 2025: The image and web ID: 5 highlight ongoing economic uncertainty, inflation (2.6%), and US tariffs impacting exports. The transition to net-zero (e.g., supporting offshore wind in Aberdeen, Orkney) is a key opportunity, but the CommonWealth article's point about foreign ownership in oil and gas (41.3% foreign, 29.7% private equity) suggests similar dynamics may affect maritime profits. The maritime sector has adapted to support renewables, but economic challenges and foreign ownership limit Scotland's ability to fully capitalize on its maritime assets.

The establishment narrative often portrays Scotland's maritime sector as a success story, but the data reveals underlying issues:

Foreign Ownership: Similar to the oil and gas sector (per the Common Wealth article), maritime services likely see significant profits flow overseas due to global firms' involvement (e.g., Maersk in shipping). This undercuts claims of economic benefit for Scotland.

Economic Stagnation: The marine economy's 14% GVA decline from 2013–2022 (web ID: 8) and modest growth forecasts for 2025 (web ID: 5) suggest that, despite the sector's strategic importance, it hasn't fully recovered from Brexit, COVID, and global economic pressures.

Job Quality: The shift toward part-time/seasonal jobs in marine tourism (44% of employment in 2022) versus full-time roles in oil and gas support (20% of employment) indicates a potential decline in job security and wages, which the 2019 report doesn't capture.

Conclusion

In 2019, the maritime services sector in Scotland contributed £1.7 billion in GVA, £3.9 billion in turnover, and 29,000 jobs, with £1.2 billion in exports. By 2025, I estimate this has grown modestly to £1.8–2 billion in GVA, £4.2–4.5 billion in turnover, and 30,000–32,000 jobs, with exports at £1.3–1.5 billion, driven by renewable energy logistics and naval shipbuilding (7,000 jobs per the image). However, economic challenges, foreign ownership, and a shift toward lower-quality jobs temper this growth. Since devolution, Scotland has gained some influence (e.g., Ferguson Marine's nationalization), but global market dynamics and UK control over key policies continue to limit local benefits from the maritime sector.