

SEA FISH INDUSTRY AUTHORITY

Minutes of the twelfth meeting of the Seafish Domestic and Export Sector Panel

Held at the Humber Seafood Institute in Grimsby on Monday 26 February 2018

Present:

John Goodlad (JG)	Chair
Martyn Boyers (MB)	British Ports Association
David Jarrad (DJ)	Shellfish Association of Great Britain
Sheila Keith (SK)	Shetland interests
Kevin McDonnell (KM)	Scottish Association of Fish Producer Organisations
Malcolm Morrison (MM)	Scottish Fishermen's Federation
Jerry Percy (JP)	Small Boat / Inshore
Dale Rodmell (DR)	National Federation of Fishermen's Organisations
Jane Sandell (JS)	UK Association of Fish Producers Organisations
Marcus Coleman (MC)	Seafish, Chief Executive Officer
Aoife Martin (AM)	Seafish, Business Services Director
Debbie Cook (DC)	Seafish, Corporate Relations Director
Declan Byrne (DB)	Seafish, Finance Manager
Simon Potten (SP)	Seafish, Panel Secretariat

Apologies received from:

Chris Anderson	Representing processors using domestic catch
Jimmy Buchan	Scottish Seafood Association
Robert Duthie	Scottish Pelagic Processors Association
Jim Evans	Representing Welsh interests

1. Welcome

1.1 JG welcomed everyone to the meeting, confirming that this would be his last as Panel Chair.

2. Minutes of the eleventh meeting held on 14 March 2017 and the Pan-Panel meeting held on 10 October 2017 (Paper 1)

2.1 These were accepted as a true record.

Update on Actions:

2.2 SK advised that Martin Leyland never received the education packs promised by Mel Groundsell (Action 11.1). **ACTION 12.1 - SP to follow up.**

3. Seafish Annual Plan 2018/2019

3.1 MC introduced the draft Annual Plan and asked members to review the proposed actions against each of the five challenges.

3.2 DR sought clarification on the status of the Corporate Plan 2018/2021 and on the budget allocations for Year 1. MC advised that CP1821 had been signed off by Ministers and was in production. The budget allocations in the Annual Plan for 2018/19 reflected the activities proposed.

Challenge 1 – EU exit

3.3 MC advised that a new Fisheries White Paper is being prepared by Defra. EU exit negotiations are obviously still ongoing, so there is currently a lot of uncertainty. The Annual Plan therefore includes provision for research and discussion to consider likely impacts for industry, which can be refined as detail starts to emerge.

3.4 MM asked for clarification on the fourth bullet point on key area 1 (MPAs), commenting that Seafish had previously withdrawn from this as an area of work. AM explained that Seafish had recently been involved in work in the Irish Sea and was keen to extend and expand this to other parts of the UK. DR advised that Seafish's work had been extremely useful and asked about timing of any future work, i.e., whether it would be done in advance to inform government policy or in reaction to measures proposed by government.

3.5 JS asked for clarification on what was meant by the third bullet point under key area 1 (UK EEZ). AM explained what was meant and agreed to adjust the wording to better explain what this activity was intended to achieve. SK advised that some work on this has already been done in Shetland, but agreed that more was still needed.

3.6 JP agreed with a flexible approach to the planning of work around this challenge. He commented that there was nothing in the plan that specifically supported the viability of the Under 10m fleet.

3.7 SK asked for an explanation of what was meant by "ecosystems services" in key area 5. AM explained that this piece of work was intended to support and help the industry present its case (and position itself) for future fisheries funding. The idea was based around something used in NZ and AM agreed to demonstrate it to those members who doubted the value.

3.8 Bullet point 3 under key area 2 (tariffs) - JS commented that this work needed to encompass non-tariff trade tools. There is already quite a bit out there on trade tariffs. Where do our products end up and where do we import from? More detail on this was needed to inform this piece of work. JS referenced an excellent piece of work by the Norwegian Seafood Council as an example. AM advised members that further work on imports/exports had been included under Challenge 4. Further work has been done by

Seafish on exports, but we are awaiting permission from Defra to publish it. AM agreed to add wording on work to be done on non-tariff barriers. SK asked if that information could be broken down regionally as well. JP added that he was concerned about the infrastructure (in the UK) to support exports of seafood (e.g., of shellfish via Dover) post-EU exit. JP commented (regarding key area 2) there was a great opportunity to promote UK seafood. Regarding key area 4 (labour) JP advised he would like to see greater emphasis on attracting UK labour; AM pointed out that this was addressed more under Challenge 3.

Challenge 2 – consumer demand

3.9 Covered under agenda item 4 (marketing presentation).

Challenge 3 – safety, labour and skills

3.10 JS was pleased to see Seafish supporting Apprenticeships for sea fishing.

3.11 MM pleased to see Seafish continuing its efforts to support and encourage the professionalization of fishermen through training.

3.12 SK would be keen to see development of the Seafish training database being linked to the online safety folder currently provided via the NFFO.

3.13 JG commented on issues between Panels regarding use of Seafish levy to subsidise fishermen's training. SP advised on the current situation regarding (MCA and EMFF) funding and commented on the historical reliance on EU funding for fishermen's training. SP advised that Seafish would be developing a business case for continued future UK government funding for fishermen's training post EU exit. MB advised that industry representatives from the EMFF Programme Monitoring Committee were meeting shortly to discuss and agree priorities for future funding, which they would present to Defra.

3.14 JS advised on the incoming requirement (under ILO C188 Work in Fishing Convention) for fishermen to undergo medicals. JS asked if that information could be integrated into Seafish's training database. JP commented on the difficulty for small boat/inshore fishermen to access medical appointments.

3.15 MB commented on the importance of key area 2, bullet point 2 (careers promotion) in attracting (particularly young) people to want to come to work in the seafood industry. DC advised on a recent event held with Grimsby Institute to promote careers in the seafood industry and advised that further events were planned in Scotland. MM advised he had attended two careers events in the last two years and commented on the challenge faced by the industry to attract school leavers. JG commented that careers promotion needed to be a collective effort; JP agreed and advised that coordinating this was an ideal role for Seafish.

Challenge 4 – supply and responsible sourcing

3.16 JP advised that Seafish should not ignore the issues/concerns raised about seafood; promoting seafood consumption whilst ignoring these would be irresponsible and would undermine Seafish's reputation and integrity.

3.17 MM advised he thought that Seafish was cutting back on its fishing gear technology work, but was reassured that Seafish wanted to continue and develop this work, with a succession plan in place to ensure its continuation.

3.18 AM pointed out that key area 2 (addressing supply constraints), bullet point 4 was where Seafish was planning further work on imports.

3.19 DJ commented on key area 1 (aquaculture) and advised that there was huge potential for, particularly shellfish, aquaculture, but that water quality, planning, and other issues were making it very hard for the industry to achieve this potential. AM confirmed that Seafish would keep working with industry and government to help resolve these blockages.

Challenge 5 – knowledge and insight

3.20 AM explained the rationale and background to the establishment of the Seafish Expert Panel.

3.21 JP commented on key area 2, bullet point 2 (deep dives on strategic issues) and advised that data collection needed additional focus on small/inshore boats. He also questioned need for further mapping products (key area 2, bullet point 7).

3.22 DR commented on animal welfare issues impacting on the industry (e.g., humane killing) and enquired what the proposed TAC Atlas was? AM explained she had found it really useful when working in New Zealand and considered it could become a really useful reference tool in the UK, analysing and re-presenting existing ICES information. **ACTION 12.2 - AM agreed to provide more information to those members who were doubtful.**

3.23 KM commented on importance of training crew to get a MOB (manoverboard) back on board. SP advised that Seafish had recently secured EMFF funding to re-develop its fishermen's basic safety training courses to bring them into line with the requirements of International Convention on Standards of Training, Certification and Watchkeeping for Fishing vessel Personnel, which the UK hopes to implement in 2019. He advised that the content on MOB recovery would be reviewed and updated, but commented that training was only the first part of the solution; onboard drills needed to be conducted more regularly to put learning into practice and prepare the crew on each and every vessel. SK suggested video content could be developed to show effective MOB recovery using different types of approved equipment. JP commented that all the crew needed boat handling skills to enable effective MOB recovery to small vessels; is there appropriate MOB recovery kit available?

3.24 JS commented on mechanisation study and importance of training to be provided.

Budget

3.25 DB confirmed that there would be a small Seafish Strategic Investment Fund in 2018/19 (£400k) and advised that the cost of this was included in the budget allocation at the back of the draft Annual Plan (spread pro rata across the Challenges); same goes for the cost of regional delivery.

3.26 MB asked what impact future political changes post-EU exit regarding national division of levy could have. MC advised it was always a subject of discussion, but commented that Seafish Scottish Advisory Committee had been established in response to Scottish concerns.

4. Seafish Marketing Showcase

4.1 DB presented an overview of the work that Seafish's MarComms team had undertaken to promote the consumption of seafood under CP1518 and plans for taking this forward under CP1821.

4.2 Every £1 invested in Seafood Week in 2015 returned between £25 and £64 of additional retail sales; representing a £7-18m benefit to the industry. JP asked if this figure could be broken down further in future to see where the benefit was being made.

4.3 Consumption fell by 2.7% in 2016 (£6.1bn) compared to 2015, mainly in foodservice.

4.4 The Big 5 species are getting bigger; consumer confidence in other species is not growing.

4.5 Big growth in chilled seafood; frozen seafood only grown incrementally.

4.6 Current UK consumption is 1.15 portions a week, compared to our target of 2-a-week.

4.7 Work area very well supported by Panels; healthy budget allocated.

4.8 Key consumer messages (e.g., fish is easy) presented along with key challenges being faced (e.g., price, bones, etc.).

4.9 Six consumer segments to be targeted, some likely to yield better results than others.

4.10 Campaigns (Seafood Week, SuperFishOil, Fish is the Dish, Fish2aweek) to be continued, developed and expanded. DJ commented on prevalence of "fish" in messaging, not seafood (and certainly no mention of shellfish); **ACTION 12.3 - DC agreed to address where appropriate.**

4.11 Campaign to increase awareness of 2-a-week between Dec-16 and Mar-17 resulted in increase in awareness of the promotion from 20% to 28%. Awareness of health advice increased from 28% to 34%.

4.12 Seafood Week in 2016 generated increase in sales of 8.9%; toolkit developed for businesses to use (generated 10% increase in sales for trial area). It was pleasing to see that several major retailers had piggy-backed on the campaign. Focus weeks and targeted campaigns do work, though recognise that more needs to be done to ensure that uplift sticks and doesn't fall back to previous levels. In 2018 Seafood Week is 5-12 October 2018)

4.13 Proposal for new "weeks" to include fishmonger, frozen fish, shellfish; also "Friday as a fish day" every Friday.

4.14 Seafish will be taking on a Health Ambassador to coordinate a year-round media campaign around the health benefits of seafood.

4.15 Continuing our fish and chip work with Fish & Chip Day (01 June 2018) – giving thought to F&C week. Continuing our work in educating and upskilling schools and chefs. Media team will continue to be reactive and proactive to defend and promote the reputation of seafood.

4.16 JS asked if any checks had been done on how well 5-day is going with respect to fruit and vegetables. MC advised that it had been going for 10 years and that he thought it had got the public up to eating 3-a-day.

4.17 JS asked if, in context of EU exit, what is Seafish doing to promote alternatives to the Big 5 species and what it would do to get the UK consumer eating more of the species we catch a lot of, but do not currently eat (e.g., saithe, hake, monkfish, etc).

4.18 DR commented that the fishing industry was in focus more now than ever before due to EU exit; this presented a great opportunity to build up a good news story about the industry around the UK and raise public awareness/interest.

4.19 JP proposed a secret shopper initiative to ensure quality is maintained across retailers. He commented that the timing of Seafood Week in October was not ideal as it missed summer months (and potential demand from tourists). JP believed a "Week" was better than a "Day" in terms of promotions, but urged Seafish not to forget supply side considerations. **ACTION 12.4 - DC to share copy of slides.**

4.20 JG commented on the good work Seafish MarComms do and complimented DC on range and scope of proposals.

5. Review of the four Home Nation Seafood Growth Strategies

5.1 MC advised that Seafish has been asked by Defra to provide the secretariat for taking forward its Seafood 2040 initiative (with EMFF funding). Some concern what other Home Nations might think of this, especially as they all have their own strategies. MC provided an overview of these and how Seafish is engaging with and supporting them.

5.2 JP commented that he did not recognise the content in the Welsh strategy and stated that the Welsh seafood industry was not fully engaged with Welsh Government.

5.3 MM asked why Seafood Scotland was not on the list of organisations that Seafish's Scotland Delivery Team would be working with. AM advised that Seafood Scotland had a seat on Seafish's Scottish Advisory Committee and was a valued delivery partner.

5.4 DR asked for an update on the situation in England. DC advised that EMFF applications had been submitted to take Seafood 2040 forward.

5.5 MB commented that Scotland seemed to be ahead of the game in terms of seafood and funding and expressed concern that devolved initiatives diluted Seafish's impact as a pan-UK body.

6. Panel membership

6.1 JG went through the paper.

6.2 JS asked for clarification on number of appointees and representatives on the Panel. SP advised that there were five appointees and eight representatives from organisations. MB asked how the appointees were recruited.

6.3 MB commented that he felt the Panels were divisive. JP disagreed, but felt it might be worth reviewing the number and scope of the Panels. SK commented on benefit from sitting round the table with other interests. DJ commented that he didn't know what was going on in the other Panels. MB commented that he was interested in all of it, hence his belief that there should only be one Panel. JG commented that Pan-Panel meetings are helpful; Panel chairs do get the chance to attend other meetings and JG would be happy for that opportunity to be extended to members. MC advised that all other Panels were discussing the same agenda as the D&E Panel.

6.4 JP Seafish should retain oversight of Panel membership and Panel members should be able to recommend to Seafish, but not decide. Seafish Board to decide.

6.5 Members agreed that non-attendance for two meetings should result in termination of membership.

6.6 JS commented it should be up to representative organisations to decide who represents them on the Panel. It is not for Seafish to say who can and can't represent an organisation. MB commented that individuals should embrace change and be willing to change their representative every six years. JG suggested that there should be some flexibility on this, for those organisations that didn't have anyone else to send.

6.7 JS commented that item 6.c should be changed to reflect that the work of the Panel should be based on mutual respect and trust, not just the relationship between Seafish staff and Panel members.

6.8 JG advised on two expressions of interest for the vacant NI representative. Harry Wicks (NIFPO) and Rosemary Johnston (Kilkeel Seafoods). It was agreed that Rosemary would be invited to join. **ACTION 12.5 – Seafish to advise candidates accordingly.**

6.9 JG advised that an expression of interest had been received from Andrew Locker. JG pointed out that we were already at our maximum and that there were no other vacant positions. Members thanked Andrew for his interest. **ACTION 12.6 – Seafish to advise candidate accordingly.**

7. Any Other Business

7.1 Members expressed their gratitude to JG for his chairmanship of the Panel and wished him well.

8. Date of Next Meeting

8.1 It was agreed that the next meeting would take place in October 2018 in Edinburgh.

8.2 MC advised that there was no appetite from other Panels for another Pan-Panel meeting soon, so MC advised that focus of next meeting should be Panel-specific.

8.3 MC suggested that it might be appropriate to consider another Pan-Panel meeting in March/April 2019.