

Minutes of the Scottish Seafish Advisory Committee Meeting

Held virtually on Monday 23 January 2024

Attendees:

Members	Mike Park Elaine Whyte Jimmy Buchan Paul Macdonald Chris Kirwan Lynne Forman Iain Matheson Michael Clark Jennifer Mouat Andrew Giblin Louise McCafferty	Scottish White Fish Producers Association (Chair) Clyde Fishermen's Association Scottish Seafood Association (SSA) Scottish Fishermen's Organisation Thistle Seafoods Associated Seafoods Fisherman International Fish Cannery Fisheries Consultant Pelagia Joseph Robertson Ltd
Observers	Jeni Adamson	Seafood Scotland
Seafish	Aoife Martin Jess Sparks Phillip Quirie Lewis Tattersall Arina Motova-Surmava Matt Frow	Director of Operations Industry Engagement Manager - Scotland Project Co-ordinator and Administrator Head of Fisheries Management (part) Chief Economist (part) Kingfisher and Geospatial Services Manager (part)
Apologies	Sheila Keith	Shetland Fishermen's Association

Welcome and apologies

1. The Chair welcomed everyone to the meeting. Apologies were shared from Sheila, with Jeni attending as a substitute for Donna Fordyce.

Minutes of the previous meeting and actions arising

2. The minutes of 12 September 2023 are an accurate record of the meeting with no amendments required.

ACTION 01: Phillip will upload the approved September minutes to the Seafish website.

3. Jess reported that all actions from the previous meeting are complete.

SSAC members update

4. The Chair invited committee members to provide an update from their sector, outlining any challenges or opportunities.

5. The ongoing primary challenge for processors is access to labour. The problem is not easing with some processors turning away business because they don't have sufficient labour to fulfill orders. The SSA are engaged with Seafish, government, and MPs on this challenge.
6. It was also noted that the high proportion of small sized fish being landed are very difficult to process with any sort of profit margin. The staffing issues noted above compound this issue.
7. Secondary seafood processors reported a growing focus on making progress towards carbon reduction and the transition to net zero. Energy prices remain high but have recently started to come down.
8. The catching sector continues to experience crewing challenges. It was reported that some inshore fishermen earned up to £1200-£1500 per week over the festive period but that still wasn't enough to attract long-term crew.
9. The proposed introduction of new medical requirements has resulted in many older vessel owners selling their boats as they didn't expect to pass the medical exam. As such, there will be frustration if the consultation results in the Maritime and Coastguard Agency (MCA) not taking forward these new requirements. The large increase in the cost of vessel insurance has also been a factor in small vessel owners selling up.
10. In Argyle and Bute, the fishing industry is becoming concerned about the potential restrictions on fishing activity that could be imposed through the introduction of marine national parks.
11. The availability of monkfish quota could become a challenge this year. In 2023 the North Sea Nephrops fishery had a poor fishing year; the sector is hoping fishing improves for this year.
12. There are also increased requests from customers seeking details of wider sustainability credentials - catch provenance, ethics/welfare issues, and carbon emissions profiles for key species and products . This detail can be difficult for secondary processors to provide. Additionally, the increased ethical and crew welfare focus within Fishery Improvement Projects (FIPs) is proving difficult to demonstrate. It is felt that this is an area that industry needs to increasingly focus on.
13. Further discussion confirmed the growing supply chain requirements to demonstrate good social and welfare practices and the difficulties in being able to do so. It was noted that many of the tools available to demonstrate good practice may still fail to identify issues, and such cases have already been identified in recent media and campaigns (such as the recent Outlaw Ocean campaign). The Committee agreed the future Scottish pilot to create a worker driven social responsibility programme for fishing crew will be a positive step to help in this area.
14. East coast inshore fishermen believe the storm patterns being experienced this winter are a function of climate change. They have struggled to access creels and seen an increase in lost and damaged gear, which leads to loss of earnings and cash flow problems. Recent stock assessment reports for crab and lobster are not good which may further impact this sector going forward.
15. The new MSC Standard Version 3 has stringent criteria on demersal trawling habitat impact. This will need to be assessed in relation to the Scottish Fisheries Sustainable Accreditation Group MSC certificates.
16. Seafood Scotland (SFS) confirmed they will have a stand at three forthcoming food expos: Gulfood in Dubai, Seafood Expo North America (SENA) in Boston, and Seafood Expo Global

(SEG) in Barcelona. The team are also supporting the Global Seafood Alliance to promote the Responsible Seafood Summit being held at St Andrews in October. SFS will also support Scotland Food and Drink 'Showcase Scotland' in March, by arranging tours for buyers.

17. It was commented that questions over sustainable and ethical issues around the mackerel and Nephrops fisheries puts their future supply into the marketplace at risk. This is a serious issue as they are two key species for the Scottish industry.
18. SSA reported that they had recently attended an event focused on how seafood can contribute to the Scottish Government Good Food Nation Act. It was well attended by stakeholders but disappointingly there were no politicians able to attend the event on the day.
19. A discussion took place about recent initiatives relating to machine filleting for the frozen block market. The small Scottish fish size makes it very difficult to produce an economically viable product which can compete with blocks produced with Icelandic haddock or Alaskan pollock, which are made from larger fish. It was confirmed that there is an initiative in the Northeast of Scotland looking at developing processing technology for small haddock, however it is still commercially sensitive. Jimmy said further insight will be available in April.

ACTION 02: Aoife and Jimmy will provide an update on developments in processing for small haddock in the northeast at the next meeting.

Seafish Executive update

20. Aoife provided an update on three areas of focus:

Seafish levy:

The responses to the informal consultation held in March/April 2023 were shared with the Seafish Board. Revisions have subsequently been made with regards to pelagic species, cockles, mussels, and whelks. Details of these amendments and the issues raised during the informal consultation were released in January. See: [Seafish Levy Review: Response to voluntary non-statutory consultation](#) The next stage will be to conduct a formal consultation in late spring, pending Minister agreement.

Seafish Annual Plan:

The 2024-25 Annual Plan is currently being prepared, which will be the second Annual Plan within the current five-year Corporate Plan. Aoife welcomed members to contact her with comments or suggestions for work that should be included in line with our 2023-28 Corporate Plan priorities.

Seafish Board meeting:

The next meeting will take place 21-23 May in the Northeast of Scotland. The Board are keen to conduct industry visits and meet SSAC members in the area. Invites will be sent in due course.

ACTION 03: Aoife will include engagement with SSAC members during the Seafish Board visit to the northeast of Scotland in May.

Seafish activity update

21. Jess and Aoife shared an update on some of the key Seafish activities that are currently of relevance to the Scottish industry (Attachment: 01 SSAC 230124 - Seafish Activity Update). This included reference to a man-overboard event taking place in Aberdeen; the launch of the Seafood

Emissions Profiling Tool; up and coming trade promotion at the SENA and SEG shows; regulatory activity supporting the facilitation of domestic and international trade.

22. Aoife reported that Seafish produced a short paper for Defra before Christmas which presented case studies of how the changes to the Skilled Worker Visa salary threshold would impact catching and processing sector businesses. A full impact report will be submitted to Government as soon as it is finalised. Seafish has also engaged with the Home Office to ensure they understand the impacts the changes will have across the seafood industry. The skilled worker visa guidance will be updated with reference to the increased minimum salary changes once those changes are finally confirmed.

Nephrops activity update

23. Aoife explained the recent campaign criticising the environmental impacts associated with Nephrops trawling and the lack of progress of the Fisheries Improvement Project for UK Nephrops. Seafish has published a response: [Why scampi caught in UK waters can stay on the menu](#) providing up-to-date information on the state of the fishery and fleet performance. A technical information note for businesses has also been produced to support direct responses to customer enquiries.
24. Lewis gave a presentation on the work underway on the Nephrops fisheries management plans (FMP). He outlined the scope, approach to stakeholder engagement, and expected outputs and timelines. (See attachment: *02 SSAC 230124 – Nephrops FMP*).
25. An in-depth discussion followed. It was observed that there is a broad range of interested stakeholders seeking engagement with these plans, and varied interests within industry itself. It was acknowledged that this would lead to setting up separate stakeholder engagement groups to scope such wide perspectives.
26. The main purpose of an FMP is to deliver sustainable management of a target species. There are other objectives in the Fisheries Act 2020 covering topics such as bycatch and environmental impacts of fishing, however in some instances these priorities may be covered in other plans and legal frameworks. It was commented that FMP's have legal standing with minimum requirements, however Government need them to be credible, so may need to cover things like environmental impacts.
27. It was also noted that where other strategies and plans exist, FMP development will map this out to avoid unnecessary duplication. It was also noted that these are simply plans, so may lay out frameworks through which other objectives can be delivered, such as pathways for co-management for example.
28. It was acknowledged that Nephrops fisheries issues are extremely complex, and timelines laid out in the Joint Fisheries Statement are short, so there is a lot of work to do relatively quickly.

Seafish support on impacts of spatial squeeze

29. Matt Frow, Kingfisher and Geospatial Services Manager explained how we are combining our mapping expertise with our economic analysis to enhance our understanding of the impact of marine spatial squeeze on the industry. Matt's presentation illustrates the growing competition for space, the challenges this brings and how Seafish can help, (Attachment: *03 SSAC 230124 – Understanding Impacts of Spatial Squeeze, pages 1-26*).

- 30. Arina provided an overview of the economic data Seafish has available to analyse spatial squeeze. Arina also demonstrated the Spatial Fishing Data Mining Tool, which allows industry to assess and respond to spatial squeeze discussions using bespoke maps and fisheries data. (Attachment: 03 SSAC 230124 – *Understanding Impacts of Spatial Squeeze*, pages 27-28).
- 31. It was commented that this appears to be a valuable and useful tool. General Data Protection Regulation (GDPR) limitations may affect the vessel information that can be made available. Specific requests can be directed to: economics@seafish.co.uk
- 32. It was noted that industry in general would find this tool particularly helpful if they could access some of the entry-level data which wouldn't identify Producer Organisation or individual vessel data.

Any other business

- 33. Seafish is establishing a baseline measurement of stakeholder sentiment and is actively seeking feedback to understand how people feel about the work we do. The brief survey will be circulated soon after the meeting. We'd appreciate it if all members could take a few moments to respond.

ACTION 04: Phillip will circulate the stakeholder sentiment survey within February.

Date and format of next meeting and close

- 34. It was agreed to hold the next meetings virtually on 16 April and 10 September 2024.

ACTION 05: Phillip will share calendar invites for the agreed meeting dates in April and September.

- 35. The Chair thanked everyone for their participation and closed the meeting.

Action List

	Action	Timeline	Owner
1.	Phillip to upload the approved minutes of the September meeting to the Seafish website.	February	Phillip
2.	Aoife and Jimmy will provide an update on developments in processing for small haddock in the northeast at the next meeting.	April	Aoife and Jimmy
3.	Aoife will include engagement with SSAC members during the Seafish Board visit to the northeast in May.	May	Aoife
4.	Phillip will circulate the stakeholder sentiment survey within February.	February	Phillip
5.	Phillip will share calendar invites for the agreed meeting dates in April and September.	January	Phillip