

Minutes of Seafish Wales Advisory Committee
Held on Thursday 3 November 2022 by video conference

Attendees

Members: Marcus Coleman, Seafish (stand-in Chair)
 Julie Hill, Lobster Pot
 Paul Howes, Swansea University
 Jim Evans, Welsh Fishermen’s Association
 John Penaluna, National Federation of Fish Friers
 Lewis Le Vay, Bangor University

Observers: Bethan Jones, Welsh Government

Seafish: Lynn Gilmore, Director of Communications and Engagement
 Noemi Donigiewicz, Regional Manager – Wales
 Aoife Martin, Director of Operations (in part)
 Simon Potten, Head of Safety, Training and Services (in part)
 Ella Brock, Fisheries Science Officer (in part)

Minutes: Phillip Quirie, Project Co-ordinator and Administrator

1 Welcome and apologies

- 1.1 The Chair welcomed everyone to the meeting and reminded members that the previous Chair, Jon Parker, has stepped down as Chair to pursue other avenues. The Chair used the opportunity to express gratitude and appreciation for Jon’s service to Seafish and the Seafish Wales Advisory Committee.
- 1.2 Apologies were shared on behalf of Colin Charman (Natural Resource Wales), Trevor Jones (Bangor Mussels Producers), Andy Woolmer (Atlantic Edge Oysters), and Gareth Bevington (Welsh Government).

2 Minutes of the previous meeting, held on 17 May 2022 and actions arising

- 2.1 The Chair invited feedback on the draft minutes. No feedback was received, and the minutes were approved as an accurate record of the meeting.

ACTION 01: Phillip will upload the approved minutes of the May 2022 meeting to the Seafish website.

- 2.2 Noemi provided an update on actions arising from the meeting held in May:

No.	Action list from 17 May 2022	Owner	Status
1.	Phillip will upload the approved minutes of the October 2021 meeting to the Seafish website.	Phillip	Complete.
2.	Noemi will arrange a discussion with Andy to progress the Seafish apprenticeship.	Noemi	Complete.

3.	Jim will provide Phillip with the MSC pre-assessments report to circulate to SWAC members.	Phillip and Jim	Jim informed Phillip that the report will be available to members next year.
4.	Jim will provide Phillip with the feasibility study report to circulate to SWAC members when published.	Phillip and Jim	Complete. Phillip circulated to members by email on 1 September 2022.
5.	Phillip will arrange the next meeting in early November 2022.	Phillip	Complete.

3 **Seafish and Wales Manager update**

3.1 Lynn gave an overview of recent work Seafish have undertaken to support the UK seafood industry in changing and challenging times:

Russia-Ukraine conflict:

- Considerable work in this area, including advice to DEFRA, economic analysis, guidance for industry, monitoring levy implications, and the development of a code of practice for farmed whitefish.

Labour transit visas:

- Supporting the industry on emerging issues on transit visas and changes to immigration policy, and the implications on the supply chain.

Energy crisis:

- Monitoring the implications of high fuel costs on industry - the information is available to read on our website.
- Carried out a survey of processors to inform the Energy Intensity Industry Scheme and the analysis is complete.
- Providing input to scenario planning as part of the Government's work on national preparedness for winter energy shortages.

International trade facilitation Aligning with International Trade Week to maximise social media opportunities to promote the support and guidance we offer and our video on international trade facilitation.

- Publication of a blog on the [five most asked questions we receive about VAT](#).
- Publication of a blog on the [Target Operating Model for imports](#).
- Development of a blog featuring a "behind the scenes look" at our Regulation team – the Seafish experts who help industry connect with the right people, make the complex seem simple, and help to amplify the seafood industry voice.

International trade promotion

- We continue to build our presence at global seafood expos in partnership with DEFRA and Department for International Trade, supported by the Government £1m export support package.

- The recruitment process for Seafood Expo Global 2023 in Barcelona is almost complete, with 18 expressions of interest requesting a total of 150sqm of exhibition space – demonstrating huge growth from last year when 5 exhibitors took a total of 60sqm.
- We are also working with DEFRA and DIT to host a UK pavilion at Seafood Expo North America in Boston, which will be a communal area available for UK businesses to use throughout the show – discussions are ongoing with Welsh Government to involve Welsh industry.

Changing climate:

- Industry sought our support on adapting to a changing climate and mitigating the impacts, and we aim to help get the seafood sector on a clear path to achieve emissions targets and ensure businesses understand how they will need to adapt.
- The Seafood Emissions Profiling Tool developed some years ago has been undergoing further development – the tool will be up and running next summer.

Workforce and skills:

- Delivered 7 Man Overboard events in partnership with RNLI, which proved to have real impact on fishermen and there are many examples of changing safety behaviours since attending. Further events are planned and are listed on the Seafish website: [Man Overboard Funded Training – Seafish](#).
- Planning for the third phase of the Home and Dry safety campaign underway, focusing on improving safety on single-handed fishing vessels – the Comms team would welcome any fisherman willing to be involved to help spread the message to other fishermen.

Supply chain issues:

- Delivered an international symposium on the human health impacts of microplastics in seafood, which saw research experts and industry from across the UK, Australia, United States, and Europe debate and consider the risk to seafood – a report will be available in early 2023.
- Completion of the first phase of the crustacea welfare Codes of Practice project, in collaboration with the Shellfish Association of Great Britain and the Crab Management Group.
- Ongoing work bringing together key players in the UK supply chain to explore solutions to problems within the supply chain, such as maximising use of small haddock and using mussels as a food ingredient.

Data and insights:

- Completion of the annual fleet and processing surveys. The latest fleet survey was made available for download on the Seafish website: [Economics of the UK Fishing Fleet 2021 – Seafish](#).
- The Market Insight team published June to September 2022 updates on seafood in multiple retail; farmed seafood in multiple retail; and seafood consumption on the website for download: [Insight on Seafood Retail Data – Seafish](#).

3.2 A discussion then followed on the issue of transit visas in Wales, with the following points raised:

- The costs involved in getting one individual through the process came to almost £26k, meaning a skipper looking for three crew to operate a vessel will cost more than £75k – an enormous barrier.
- The six months reprieve period offered by the Home Office is wholly unrealistic – it takes over five months to get an individual through the process and that is with the advantage of Level B1 English competency, which is a scarce skill level in prospective crew members.
- There is a risk involved when investing in this process – there is no guarantee that the individual will remain with the sponsor, as they are entitled to work with another sponsoring company.

3.3 Noemi presented an overview of her recent delivery in Wales (Attachment: *01 SWAC update 031122*).

Progress was given under the five challenges in the current Seafish Corporate Plan, and included:

CH1 – Changing landscape:

- Industry support and signposting to Regulation and Economics teams, as well as updating Welsh Government, supporting the Cross-Party Group, and attending numerous stakeholder meetings.

CH2 – Seafood consumption:

- Development of MaSTE (Marketing Seafood Through Education) through the creation of case studies and establishing Welsh Champions.

CH3 – Safe and skilled workforce:

- Facilitating the Welsh Fishing Safety Committee and delivery of the Wales Safety Project.
- Supporting the Seafish Wales Training Network.
- Informing Welsh industry of safety training opportunities.

CH4 – Ensuring sustainable supply:

- Connecting Seafish with Welsh Government and relevant stakeholders in order to support the Odyssey Project, which looks at gear recycling.
- Signposting Welsh industry to currently available information on carbon emissions and discussing how Seafish can support bespoke projects related to carbon footprint mapping.

CH5 – Data, innovation, and insight:

- Connecting stakeholders with Seafish Economics and Regulation teams where relevant and responding to individual enquiries.

4 **SWAC members update**

4.1 The Chair invited each member to provide an update on any challenges and opportunities from their sector. He explained that all insights are captured and fed into discussions with the Seafish Board which helps to shape the direction of future Seafish work.

4.2 Paul Howes reported that times have been busy and challenging:

- Several new projects are starting:
- “Ignition” Horizon 2020, looking at crustacean welfare and development of operational welfare indicators – similar indicators were developed for lumpfish.
- “Cure for Aqua”, looking at disease in rainbow trout and assessing the effects of temperature on the fish.
- “Clean Gain”, examining behavioural personalities of cleaner fish.
- The “Smarter Aqua” and “Wales Ace” projects are reaching their end.
- Recent experience has demonstrated how difficult it is to develop projects with partners based in the EU – the process is very bureaucratic and makes it difficult to lead or participate in pan-European projects.
- Still waiting for information on the promised UK funding avenues which will replace previous EU funding opportunities.
- Exploring options to supplement funded research activity with commercial and consultancy contracts – they are keen to speak to partners to develop ideas and outlined the great facilities and expertise on offer.
- Looking to develop courses aimed out-with academia, for example online diplomas in fisheries and aquaculture – potentially offering to industry as a means of accreditation.

A brief discussion followed, and it was agreed that Seafish will send Paul the video Oscar Wilkie recorded for the previous meeting on crustacean welfare and ensure Paul is linked up with Oscar for the “Ignition” crustacean welfare project.

ACTION 02: Phillip will send Paul the video presented at the previous meeting on the Seafish crustacean welfare work, and ensure Oscar Wilkie and Paul are joined up as the - “Ignition” project gets underway.

4.3 John Penaluna said the rising costs of living are impacting consumers and prices are increasing daily. He added:

- There is an apparent reduction in bookings and footfall in foodservice but there is an uplift in people selecting fish in his shop – scampi and other premium seafood products are particularly popular.
- The hospitality sector in general is struggling, with 2021 figures indicating that out of home servings equate to 71% of pre-pandemic figures. The fish and chips sector is performing slightly better, but the number of servings is below pre-pandemic figures.
- Numerous small to medium sized foodservice outlets have permanently closed.
- However, Penaluna's Famous Fish and Chips have recently bought a mobile unit to serve fish and chips at corporate events 2-3 times per month – it's proving to be a good source of additional revenue.

4.4 Julie Hill reported that the crab market in China is still proving impenetrable, but trade with Europe is holding up and new market opportunities are always being explored. She continued, saying:

- Company turnover is good, but profit is down due to the increased operating costs – energy prices are so high that they won't store the normal amount of product over the winter.
- Recently attended the SIAL food expo in France, and although no orders were received, the event provided valuable networking opportunities. One particularly productive conversation was with the British Embassy in Netherlands, which resulted in Julie being asked to put together a business case requesting more border inspection posts to access mainland Europe – Julie would welcome any input from interested partners.
- Attended the SAGB conference, which focused a lot on crustacean sentience. With their product being transported through England, there is a concern over transport welfare.
- Enquiries have been received from domestic businesses who were buying directly from fishermen during the summer and are now looking for product from producers – there is a concern that these businesses will return to buying Canadian lobster.
- The Lobster Pot have an opportunity for a student to join the business in a 50/50 role split between production and office work and agreed to provide details of the vacancy to Paul and Lewis for advertisement at their respective universities.

ACTION 03: Julie will provide Lewis and Paul with details of the vacancy to advertise to graduates at their universities.

4.5 Lewis Le Vay gave an update of recent activity at Bangor University:

- A number of large long-term projects are reaching their conclusion, particularly those funded under ERDF or EMFF and no subsequent funding has been made available. A total of 25 projects were run under the ERDF funding, which focussed on licencing Pacific oysters, development of offshore aquaculture, survey methods for inshore fisheries, and assessing and improving water quality in shellfish production areas.
- The pilot offshore mussel project is also nearing completion – a follow-on project has been submitted and pending a decision on whether it has been approved for EMFF funding.
- Also under consideration for EMFF funding is a native oyster hatchery project at Menai Bridge, which will supply seed to restoration projects around the UK.
- The EMFF fisheries science partnership project will run through until April 2023, which has been an important project enabling fisheries science teams to collect evidence to support commercial fisheries in Wales.
- A whelk stock assessment is being finalised and assessments of skates and rays are underway.
- New FIS projects are commencing through until 2024: assessing lobster fisheries in offshore windfarms, ecosystem impacts of pot fishing gear on seabed habitats, and looking at mobile fishing gear and seabed carbon disturbance.

4.6 Jim Evans reported that current challenges are similar to those reported at the last meeting:

- The cost of fuel remains a primary issue for the catching sector, as well as the rising costs of courier services, steel pots and gear, rope, bait, boxes, and packaging. No reserves or resilience was built during the summer, which could adversely affect the winter months – businesses are closing, and a real concern is that more will follow. Critical business decisions are being made in the midst of these financial concerns and there is a real risk of mental health problems due to the pressures being experienced.
- Recent market research indicates consumer demand for seafood is declining, and the decline is predicted to continue.
- Access to (and retention of) crew members has become increasingly difficult, and the WFA are working on the provision of new entrant training with the aim of attracting people into fishing and establishing apprenticeships. Transit visas and general immigration policy is a huge barrier to accessing skilled foreign labour.
- The implications of marine spatial squeeze in the Celtic Sea will have an alarming effect on the Welsh industry. In particular, the infrastructure of renewable wind energy will cause disruption and displacement – a massive concern for the Welsh fleet.
- The annual fisheries negotiations are due to conclude by 10 December. The inclusion of non-quota species into the framework agreement is not progressing, and concerns were raised about data exchanges between the EU and UK – only the MMO receive the figures and the reliability of the data has been questioned. The UK had 12,000 tonnes of non-quota species in EU waters and EU vessels had 32,000 tonnes in UK waters.
- The UK-EU Trade and Co-operation Agreement will be reviewed during renegotiations in 2026, meaning any interim progress may be lost when this occurs.

5 **Welsh Government update**

5.1 Bethan Jones provided a verbal summary of recent fisheries activity within Welsh Government, which included:

Marine & Fisheries Future Funding (EMFF replacement):

- Marine and Fisheries Funding proposals for 2022/23 are under development and officials are continuing engagement with stakeholders to ensure co-production of a scheme which will support various commitments in the new Programme for Government.
- Investment through the EMFF replacement scheme will contribute to the Welsh National Marine Plan, the Well-being of Future Generations (Wales) Act as well as the principles and specific commitments in the Programme for Government along with commitments made in the JFS and Fisheries Management Plans.
- The UK Spending Review and Budget has allocated £6.2m over the next three financial years (2022-2025) to the Welsh Government for Marine and Fisheries which will enable Welsh Government to effect positive change to the marine and fisheries sector.

Blue Recovery and Coasts and Seas Partnership:

- The Wales Coasts and Seas Partnership (Wales CaSP) formerly Wales Marine Action and Advisory Group (WMAAG) was relaunched on 6 October by the Minister for Climate Change, Julie James.
- In line with the Programme for Government ambitions for building a stronger, greener economy and embedding our response to the climate and nature emergencies in everything we do, the CaSP is working on three key 'enablers' necessary to achieve our vision for Welsh seas:
 - Developing ocean literacy across all parts of society - raising awareness of the significance of our coasts and seas will encourage further action across policy areas, and other administrative frameworks such as Public Service Boards.
 - Sustainable long-term investment and developing longer term sources of public and private finance is crucial to support delivery of key objectives.
 - Building capacity, particularly at the local level, will enable meaningful community engagement to identify local opportunities and challenges and deliver action.

- Current work on blue carbon recovery includes:
 - Developing an Ocean Literacy strategy for Wales and actions to connect people and work to amplify the importance of the marine environment and our impacts on it.
 - Shaping content for the European Maritime and Fisheries Fund Successor Scheme and exploring a blended finance mechanism for the marine environment in Wales.
 - Developing a new capacity building element within the above scheme to establish longer term engagement and build coastal community capacity;
 - Delivering the 30x30 Biodiversity Deep Dive recommendations for capacity building, skills development, behaviour change and awareness raising in the marine environment.

Joint Fisheries Statement & Fisheries Management Plans:

- Following a public consultation which ran from 18 January to 2 April, a factual Summary of Responses was published on 1 July.
- The Economy, Trade and Rural Affairs (ETRA) Committee considered the draft JFS and published their report “Scrutiny of the draft Joint Fisheries Statement” in April 2022.
- Officials are working with the other UK administrations to finalise the JFS and to produce a joint Government Response to comments raised during the consultation. A statement in response to the ETRA Committee recommendations is also being finalised and will be laid in the Senedd. The JFS is due to be published by 23 November.
- Once published, the JFS will set out a list of Fisheries Management Plans (FMP), to be delivered over the lifetime of the first Statement. Some of these FMPs will be joint approaches with other Administrations to reflect the geographic extent of the particular fish stocks. Others will be regional Wales plans and will reflect and support the considerations we are undertaking in relation to our own policy aims and ambitions.
- Officials are working on FMPs both for priority stocks for Wales and in conjunction with other Administrations for wider stock areas. We will be engaging stakeholders in this process and FMPs will subsequently be subject to consultation.

Fisheries management – cockle:

- The Welsh Government held a public consultation on proposals for new cockle fisheries management measures in Spring 2022 which were very well received: [Cockle Fishery Management Measures 2022 - summary of responses \(gov.wales\)](#).
- The Three Rivers Cockle Fishery has been very productive in 2022, with a TAC of more than 5,000 tonnes. The North Wales cockle beds, which will be open over the winter, have a combined TAC of 1,766 tonnes.

Fisheries management – whelk:

- Following the Whelk Fishing Permit (Wales) Order 2021 coming into force, the first whelk permit period began on 1 March 2022. More than 90 fishers are permitted, of whom around 30 fish each month.
- The new management system, which was co-designed with fishers, has provided new insights into the fishery. The fishery is starting to slow down as we move into winter, however, so far this year catches worth around £4M have been taken.
- The Wales Whelk Advisory Group (WWAG) has been set up to advise the Welsh Government on the management of the fishery.

Fisheries management – king scallop:

- The king scallop fishery in Wales opened on 1 November. The Welsh Government is currently working with Defra, the Scallop Industry Consultation Working Group and Seafish on the development of a king scallop Fisheries Management Plan (FMP) for England and Wales.
- Pre-consultation meetings about the FMP have been taking place across the UK. To improve engagement with stakeholders in Wales, the Welsh Government will be holding further meetings with stakeholders to capture views. Once information from stakeholder events has been considered a public consultation on a draft FMP will take place in 2023.

Fisheries management – bass:

- The Welsh Government is currently working with Defra and the UK government's Policy Lab on the development of a bass FMP for England and Wales. Policy Lab have been contracted to lead on the evidence research and stakeholder engagement stages of the FMP development.
- Policy Lab have been using innovative techniques to engage with a range of stakeholders to capture their views on what they think this bass FMP should include. The Welsh Government will be holding further meetings with stakeholders in Wales to ensure their views are captured. The drafting of the FMP and a public consultation will take place in 2023.

Trade:

- The Welsh Government is currently in the process of procuring a contractor to deliver Seafood Expo Global 2023.
- Also discussing engagement in Seafood Expo North America (Boston March 2023) with Seafish who will have an open communal stand.
- Actively promoting engagement with Food and Drink International Trade Events.

6 **Fisheries management and long-term sustainability of commercial fisheries**

- 6.1 Ella Brock presented an overview of the Seafish work on shellfish Fisheries Management Plans (FMPs) (Attachment: *02 Shellfish FMPs – SWAC 031122*). Seafish facilitates the Shellfish Industry Advisory Group (SIAG), which is an industry led co-management group focusing on issues related to national-level strategic management of shellfish fisheries in the UK. The SIAG is a central committee under which three species-specific groups operate – the Whelk Management Group (WMG), the Crab & Lobster Management Group (CMG), and the Scallop Industry Consultation Group (SICG). These three each have two sub-groups focusing on FMP objectives and science respectively. The presentation covered the development of the FMPs and the Seafish role, progress to date, and an overview of stakeholder engagement.
- 6.2 A brief conversation followed, and it was noted that the FMPs currently only apply to English waters and development is a devolved responsibility. Aoife explained scope exists to expand FMPs to include Welsh waters, and a second option would be to package up the existing model and work with Welsh Government to consider fully. Bethan confirmed she will open dialogue on FMPs with the Government fisheries management team and facilitate further discussion with Seafish.

ACTION 04: Bethan will open dialogue with the Welsh Government fisheries management team on the topic of Wales-specific Fisheries Management Plans and facilitate discussion with Seafish.

7 **UK Seafood Fund – Skills and Training Scheme update and opportunities in Wales**

- 7.1 Simon Potten provided a summary of the [UK Seafood Fund](#), which is a £100m pan-UK fund to support the long-term future and sustainability of the UK fisheries and seafood sectors, managed by DEFRA. The fund has £10m available to support skills and training. For the past year, Seafish worked closely with Defra to assist with the design, delivery, monitoring, and evaluation of the Skills and Training scheme. The scheme is administered by DEFRA and Seafish, with Seafish resources being funded by DEFRA at no cost to the Seafish levy.
- 7.2 The £10m has been split into two pots, with pot one being open for applications until 10 October 2022 – only 12 applications were received. Each application must evidence the industry need and support for the funding and the application process is apparently demanding and complex, which may have been the barrier preventing all but 12 applicants. Simon hopes DEFRA will not roll-over or re-allocate any underspend to other funding pillars. Pot two will be open for applications in December and has up to £5m for the construction or refurbishment of training centres. Further information on the application process is on the [UK Gov website](#).

7.3 A brief discussion followed, and comments received that the application process and requirements are difficult to navigate, and the match-funding criteria is unrealistic for most operators who could benefit from the scheme.

8 Seafish Corporate Plan 2023-28 – feedback on draft priority narratives

8.1 The Chair referred to Paper 2 – a draft overview of the priorities identified during the recent Strategic Review and narratives outlining how Seafish will address these priorities in the new Corporate Plan. Members were asked:

- Are we focusing on the right priorities?
- Have we pitched the ambition correctly under each priority?
- Are we looking to focus our resources on the right programmes of work within the priorities?
- Which areas are of particular importance to the Welsh committee?
- What particular projects should we be focusing on to help support the sector in Wales?
- Have we missed anything?

8.2 Clarification on where aquaculture priorities were covered in the draft plan was requested as this is an area of importance to Welsh industry. Aoife confirmed that the supply chain resilience priority outlined in the plan will reflect the aquaculture work being undertaken (on water quality, *Norovirus* and mussels as a food ingredient) and additional benefits to the sector will be available through our regulation team via their trade facilitation work as well as our reputation work where the ecosystem services provided by aquaculture will be a focus. She also agreed to emphasise the aquaculture focus in the Corporate Plan 23-28 draft narratives..

ACTION 05: Aoife will emphasise the aquaculture focus in the Seafish Corporate Plan 23-28, based on feedback from SWAC members.

8.3 The discussion continued, with further comments noted as follows:

- On the whole, the narratives fit with fisheries and Joint Fisheries Statement ambitions.
- The draft narratives look to answer the longer-term pressing issues, but some of the measures seemed overly ambitious
- A comment was received that it seemed like the narratives are reactive rather than proactive.
- It was suggested that the narratives around international trade are suitably ambitious but the practical realities and potential political risks (for example trade agreements and the Northern Ireland protocol) need to be fully considered.
- The climate change work is helpful, and it was recognised that it is time to start building a robust evidence base.

9 Any other business

9.1 No other business was raised.

10 Date of next meeting and close

10.1 The Chair thanked everyone for their attendance and participation. It was agreed that Seafish will circulate a poll to find the most suitable date for the next meeting in May 2023.

ACTION 06: Phillip will circulate a poll to members to establish the optimal date for the next meeting in May 2023.

No.	Action List	Timeline (Status)	Owner
1.	Phillip will upload the approved minutes of the May 2022 meeting to the Seafish website.	December	Phillip
2.	Phillip will send Paul the video presented at the previous meeting on the Seafish crustacean welfare work, and ensure Oscar Wilkie and Paul are linked-up for the “Ignition” project.	December	Phillip
3.	Julie will provide Lewis and Paul with details of the vacancy to advertise to graduates at their universities.	November	Julie
4.	Bethan will open dialogue with the Welsh Government fisheries management team on the topic of Wales-specific Fisheries Management Plans and facilitate discussion with Seafish.	Next meeting	Bethan and Aoife
5.	Aoife will consider broadening out the aquaculture focus in the Seafish Corporate Plan 23-28, based on feedback from SWAC members.	December	Aoife
6.	Phillip will circulate a poll to members to establish the optimal date for the next meeting in May 2023.	December	Phillip