

SEAFOOD

2040

Annual Report for Year 3

September 2020 – September 2021

The future is a seafood industry that is sustainable and thriving

Seafood Industry Leadership Group

CHAIR – Dr Neil Auchterlonie, Consultant
SECRETARY – Kimberly Cullen, SF2040 Programme Manager, Seafish
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WILD CATCH – Jim Portus, MBE, South Western Fish Producer’s Organisation
WILD CATCH – Andrew Locker, Director, Locker’s Trawlers (until August 2021)
WILD CATCH – Paul Trebilcock, Chief Executive, Cornish Fish Producers’ Organisation (until July 2021)
WILD CATCH – Chloe Rogers, Chair, UK Association of Fish Producers Organisations
FOODSERVICE – Sarah Phillips, Senior Category Manager, M & J Seafoods
SCIENCE – Dr Mark Berry, Chair, Seafish Expert Panel
SEAFISH LEAD – Hazel Curtis, Director of Corporate Relations (until June 2021)
SEAFISH – Marcus Coleman, CEO
DEFRA LEAD – Nicola Robinson, Assistant Director, Domestic Fisheries, Marine and Fisheries Division
DEFRA – Lydia Osborne, Inshore Fleet Reform, Domestic Fisheries and Reform

Aquaculture Leadership Group

CHAIR – James Fox Davies, Director, Fowey Shellfish Ltd
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FIN FISH – Oliver Robinson, Chairman, British Trout Association
OYSTER FARMER – Martin Syvret, Director, AquaFish Solutions Ltd
OYSTER HATCHERIES – Kelsey Thompson, Managing Director, Morecambe Bay Oysters
OFFSHORE MUSSELS – John Holmyard, Managing Director, Offshore Shellfish Ltd
SHELLFISH TRADE ASSOCIATION – David Jarrad, Director, Shellfish Association of Great Britain
CRAYFISH – Elena Piana, Founder, Noola Redclaw
MACROALGAE – Angela Mead, Director, Biome Macroalgae Ltd
SECTOR SUPPORT – Martin Sutcliffe, Fisheries & Aquaculture Development Officer, Dorset Coast Forum
REGULATOR – Roger Covey, Principal Advisor, Natural England
REGULATOR – Robert Whiteley, Marine Fisheries Specialist, Natural England
REGULATOR – Michael Gubbins, Senior Scientist, Cefas
REGULATOR – Dr Christopher Sweeting, Evidence, Marine Management Organisation
REGULATOR – Benjamin Coppin, Marine Planning, Marine Management Organisation
REGULATOR – Abbey Coppin, Marine Licensing, Marine Management Organisation (until August 2021)
REGULATOR – Jennifer Ford, Marine Licensing, Marine Management Organisation
REGULATOR – Fern Skeldon, Marine Licensing, Marine Management Organisation
ACADEMIA – Professor Lewis Le Vay, Director, Centre of Applied Marine Sciences, Bangor University
SEAFISH LEAD – Dr Stuart McLanaghan, Head of Responsible Sourcing
DEFRA LEAD – Ruth Allin, Policy Head - Freshwater Fisheries & Aquaculture Team
DEFRA – Sara Catahan, Policy Advisor - Freshwater Fisheries & Aquaculture Team

Foreword

This last year has been an important one for the SF2040 Programme as the seafood sector continues to work its way through the combined impacts of the Covid-19 pandemic, and the EU-Exit transition, in addition to the myriad challenges that fisheries, aquaculture and seafood processing experience during more normal times. I am humbled to be working alongside so many experts in seafood across the Seafood Industry Leadership Group and the Aquaculture Leadership Group (ALG) and am indebted to them for their time and input into the Programme. I also wish to thank Seafish for their continuing support in facilitating this work, and Defra for their participation in SF2040 activities and governance committees. To the members of SILG, ALG, and also to Seafish and Defra, I extend my thanks for helping to make the SF2040 Programme a continuing success. Finally, I also thank the Marine Management Organisation (MMO) and the administrators of the Fisheries and Seafood Scheme (FaSS) for the funding that allows SF2040 and the good work to continue.

In the last 12 months the original 25 recommendations of the Programme were reviewed. This was an important task to undertake, since as we all know the world is very different to that of 2017 when the original Programme was developed. That said, much of the recommendations remain on point, and where relevant we added further drivers for the work, such as enabling Blue Growth and supporting government's ambitions for Carbon Net Zero. There remains much to do, but the SILG and the ALG provide a genuine mechanism for industry to engage directly with government in a manner that reflects the whole of the English seafood supply chain. With many continuing challenges, as well as some emerging issues, this has never been more important.

We look forward in the coming months to the publication of two important documents from UK government, the Joint Fisheries Statement and the National Food Strategy. Both policy texts will be important to our work and how we prioritise and deliver the renewed SF2040 recommendations. Our consolidated list of 19 recommendations remains lengthy, complex, and in many cases urgent, and there is much to do to enable the seafood sector in meeting the Programme's vision for a thriving and sustainable industry by 2040. With government's backing and support as well as the resilience, hard work and expertise of the industry, we continue to make progress towards that ultimate goal. The coming year will be no less important than the last and I look forward to it with eager anticipation!

Dr Neil Auchterlonie, Chair, Seafood 2040

SF2040: Year 3 Ambitions

The SF2040 Programme was first established in September 2018. The primary goal was to turn the Strategic Framework with 25 recommendations into reality. This was achieved and documented in the [Year 1 Annual Report](#). The following year, there were six ambitions to achieve that continued to build on the success of that first year. These ambitions included ongoing stakeholder engagement, the tracking of recommendation progress, and to apply for further programme funding. This is documented in [the Year 2 Annual Report](#).

Year 3 was an exceptionally difficult year in the English seafood industry as we continued to live and work within the global pandemic. The effects of the three lockdowns greatly impacted on the export and foodservice sectors and were thus keenly felt by the fishing and aquaculture sectors. 2021 was also the first year of life as a coastal independent state outside of the European Union. This resulted in several challenges including an ongoing problem of exporting live bivalve molluscs to Europe which caused disruption for many English shellfish farmers. Adaptation and resilience have been required across the whole of England's seafood supply chain.

Throughout Year 3, the Secretariat continued to work in partnership with Seafish, Defra, regulators, and industry via the Seafood Industry Leadership Group (SILG) and the Aquaculture Leadership Group (ALG) – both governance committees within the Programme – to support the supply chain where possible. We completed the recommendation refresh and included an action on building resilience across the supply chain to withstand future instability. We also concluded and published the English Aquaculture Strategy which is a roadmap for a sector in need of direction. Finally, we continued to build on the relationship established with Fisheries Minister Prentis and her staff. This document details progress toward the achievement of our Year 3 ambitions:

1. Apply to the government fisheries fund in January 2021 to secure funding for March 2021 onwards
2. Complete the recommendation refresh
3. Continue to engage with the Fisheries Minister
4. Publish Recommendation 6 and Recommendation 16 research results and the English Aquaculture Strategy
5. Continue to facilitate SILG and ALG meetings
6. Plan the first year of implementation under the English Aquaculture Strategy with ALG – the priorities, the projects, the partners, and the timeframes
7. Continue to advance SF2040 recommendations through facilitation, communication, and stakeholder engagement
8. Work with the Seafish Expert Panel and increase their overall engagement in SF2040 delivery

Progress against the Year 3 Ambitions

1. Apply to government fisheries fund in January 2021 to secure funding for March 2021 onwards

The replacement for the European Maritime Fisheries Fund (EMFF) was the Fisheries and Seafood Scheme (FaSS). Applications could only be submitted in April 2021, and funding was provided for eleven months. Once available, the SF2040 Secretariat applied and was successful. The Programme also requires alternative, or complementary, funding and this will be addressed throughout the next 12-month period and beyond.

2. Complete the recommendation refresh

The original 25 recommendations were developed in 2016-17 and thus required an update to better reflect the needs in the current landscape. The project was key to ensuring the Programme remained relevant to government and industry.

The year-long project resulted in:

- 11 drafts
- 6 discussions at SILG meetings and various workshops with individual members
- 2 discussions at ALG meetings
- 6 workshops with Seafish (Regulation, Marketing, England Regional Managers, etc.)
- 2 meetings with the Seafood Industry Alliance
- 6 workshops with Defra (Trade Policy, Inshore Fleet Reform, Access & Licensing, Quota, etc.)
- 1 meeting with an industry expert

Each recommendation was revised to reflect industry needs and government priorities after the EU Exit and amidst the instability that COVID-19 presents, as well as opportunities that exist for seafood within the carbon net zero and 'Blue Food' agendas. There are now [19 recommendations](#) that form a significant piece of work which has the potential to deliver medium to long-term considerable benefits to the industry over the coming years securing our vision for a thriving and sustainable sector in 2040.

3. Continue to engage with the Fisheries Minister

The Fisheries Minister, Victoria Prentis MP, provided the Forewords for the English Aquaculture Strategy and the revised SF2040 Strategic Framework document and continues to be supportive of the Programme. The SILG met with her online in January 2021. Discussion centred on the supporting role of the SF2040 Programme in the seafood sustainability and blue growth government agendas.

4. Publish Recommendation 6 and Recommendation 16 research and the English Aquaculture Strategy

The Recommendation 16 research report identifies the issues and solutions in skills, training, recruitment and retention across England's seafood industry. The report, [England's Seafood Industry: Skills, Recruitment and Retention](#), was published online in late 2020. The data that was retrieved through a comprehensive consultation process during challenging lockdown conditions is a credit to the contractor, Pye-Tait Consulting.

The [English Aquaculture Strategy](#) provides a roadmap for the sustainable development of the aquaculture sector in England over the next 20 years. The work, delivered by Poseidon Aquatic Resource Management Ltd., is the first aquaculture strategy to exist for England, underlining its importance in providing a strategic overview for the sector. There are three outputs that were published online in November 2020:

- A brief overview: key strategic objectives and principles
- A summary: professionally designed document that highlights the opportunities and growth aspirations alongside a plan for delivery
- An in-depth report: includes a review of the English aquaculture landscape and current barriers to growth, along with the rationale and methodology behind the Strategy

The Recommendation 6 research report is complete and undergoing a peer review process to help determine the next steps before release. Through the interrogation of economic and population health data by the contractor Policy and Risk Analysts Ltd., an estimated picture of the socioeconomic value and impact of increased seafood consumption on England's population health and Government spend on ill-health has emerged. The research is an important first step in determining reliable estimates of potential government

savings as a result of increased seafood consumption across the population. It is anticipated that further research is required given the complexity of the subject matter. We will be working to fund Phase 2 and other projects relating to the health benefits of seafood consumption in the future.

5. Continue to facilitate SILG and ALG meetings

Throughout Year 3 of the SF2040 Programme which included two lockdowns, the governance committees continued to meet online.

- **SILG:** The aim of the SILG is to prioritise the SF2040 work programme and support the partnership of government and industry. The group met five times in Year 3. [Minutes](#) are publicly available on the SF2040 pages of the Seafish website.
- **ALG:** The ALG delivers the English Aquaculture Strategy as well as the SF2040 aquaculture recommendation (Recommendation 12 in the revised version). The ALG met four times in Year 3 and the [minutes](#) are available on the SF2040 webpages of the Seafish website.

6. Plan the first year of implementation under the English Aquaculture Strategy with ALG – the priorities, the projects, the partners, and the timeframes

The primary goal of Year 3 was to publish the [English Aquaculture Strategy](#) (EAS). Following a review, the SF2040 ALG considered the actions within the EAS delivery plan and prioritised the following Critical Actions:

- *Knowledge, Innovation & Technology (KI) 1:* Development of a research strategy for English aquaculture
- *KI 2:* Provide funding to support the establishment of an Aquaculture Innovation Hub in KI 3
- *KI 3:* Establish an Aquaculture Innovation Hub and online forum for England covering research, knowledge transfer, promotion of best practise, regulatory requirement & consumer information
- *Shellfish (SH) 1:* Finalise a formal policy for the use of Pacific oysters in English waters
- *SH 2:* Develop the risk-based approach to the classification of shellfish production waters
- *Macroalgae (MA) 1:* Development of specific marine licensing guidelines for macroalgae culture
- *Governance & Regulation (GR) 1:* A clear policy for English aquaculture development is prepared within the framework of the Fisheries Act, etc., and the wider policy environment

7. Continue to advance SF2040 recommendations through facilitation, communication, and stakeholder engagement

The recommendations form the backbone of the SF2040 Programme and are a culmination of discussion, planning, and actions that if implemented will support England's seafood industry toward a sustainable and thriving future. The Recommendations are an ambitious and shared plan that contain opportunities for the entire English seafood supply chain and require government and industry collaboration to be realised.

This work is achieved through the SILG and ALG committees and the day-to-day operations of the SF2040 Secretariat. There are two key partners that should be acknowledged, Seafish and Defra. Seafish facilitates and delivers elements of the Programme, and Defra is leading on several recommendations as well and continues to be actively involved.

An overview of progress on all recommendations is in Annex 1 (page 7).

8. Work with the Seafish Expert Panel (SEP) and increase their overall engagement in SF2040 delivery

Dr Mark Berry, Chair of SEP, supports our work as a SILG member, providing an important link with the Seafish Expert Panel and the programme work. This has proven an excellent resource for our work overall, with some key inputs related to subjects such as supply chain resilience, and science management.

SF2040: Future Ambitions

The plan for SF2040 from October 2021 and beyond includes the following activities:

1. Apply for Programme funding for March 2022 onwards
2. Continue to explore additional funding opportunities
3. Redesign and publish version 2 of the SF2040 Strategic Framework with the refreshed recommendations
4. Continue to engage with the Fisheries Minister and government to build stronger relationships, and increase / widen awareness and participation in the Programme
5. Advance the SF2040 recommendations through facilitation, communication, monitoring, and stakeholder engagement. In particular:
 - Recommendation 1 (*continue to embed SF2040*)
 - Recommendation 5 (*carbon neutrality*)
 - Recommendation 6 (*socioeconomic impacts of increased seafood consumption*)
 - Recommendation 10 (*support the implementation of the Fisheries Act*)
 - Recommendation 12 (*aquaculture; includes the EAS*)
6. Contribute to the Defra White Paper on England's Food Strategy to ensure seafood is included

Annex 1: Advancing the refreshed 19 recommendations in the SF2040 framework

Recommendation		RAG	Progress
1	Maintain the Seafood 2040 Programme to continue supporting England's industry toward a sustainable and thriving future by 2040.	AMBER	The majority of the recommendations reside firmly within the aegis of other bodies both public and private and SF2040's role is to raise awareness and encourage others to participate. Progress is subject to the scale of work and pace with large numbers of organisations involved which may often mean progress is less-defined or slower than the SF2040 SILG would like. The Secretariat continues to track the progress of the recommendations and working directly on those where the Programme has traction to do so with the SILG, ALG and a range of stakeholders, for example, the design and facilitation of Recommendation 5 workshop and the support provided to Dorset Coast Forum for the bid to develop the business model of an English Aquaculture Innovation Centre. Being strategic in nature, the Programme's success is largely based on the provision of long-term funding, which so far has been lacking.
2	Progress the activities identified by stakeholders as important for the development and improved understanding of the England seafood industry's science, innovation and technological needs.	AMBER	The SF2040 Secretariat is engaging with academia to secure funding to support business growth across England's seafood supply chain, especially through the adoption of innovation and new technology. We have also engaged with funding bodies (e.g. UKRI , Agri-Epi , CIEL) in order to determine opportunities for external resources to support our work, as well as the potential to influence funding calls. Further, we continue to explore collaborative opportunities with other UK organisations that work in a similar space (e.g. SAIC) and what this may mean in relation to more efficient delivery of projects and sharing of knowledge.

3	Consult industry and other relevant parties to map best practice across the English seafood supply chain for catching, aquaculture and processing activities and identify gaps and assess importance.	AMBER	The SF2040 SILG and Secretariat have held several conversations about best practice in seafood production, and the major takeaway from those discussions is that this is an enormously complex subject. We have also looked at the possibility of certification being an option for industry to illustrate best practice. The SILG gathered for six seafood certification bodies / organisations' presentations on their standards and considered the Programme's stance on certification and best practice. This is an ongoing conversation.
4	Review and compare the nutritional benefits of English wild catch and aquaculture to other protein-rich foods (e.g. beef, pork, lamb, poultry) and include processed foods containing new protein ingredients such as plant-based and cell-culture proteins.	RED	This recommendation and Rec 6 are connected. Additional (external) funding is likely to be required to progress this work. Also, the work on a National Food Strategy with Defra and Seafish as well as the Love Seafood initiative (run by Seafish) would benefit from any research commissioned.
5	Provide an overview of the environmental performance of English seafood production for national fisheries, aquaculture and processing sectors. This work will support progress towards carbon neutrality in the English seafood industry and UK Government's drive to bring all greenhouse gas emissions to net zero by 2050.	AMBER	The SF2040 Secretariat has plans to facilitate an online workshop in Year 4 to discuss Rec 5, share information, and explore pre-competitive collaborative research projects and opportunities to partner with others. Seafish have developed a carbon work programme which underscores this recommendation. The organisation is producing information and guidance for businesses on what climate change adaptation and mitigation mean and what they need to do. Seafish is also developing practical tools e.g. seafood emissions profiling tool (SEPT) for fishing and aquaculture, and ensuring relevant data are collected and available to inform decisions made by businesses and the research community.
6	Estimate the socio-economic impacts (e.g. government budgets and population health) of a shift to consumption rate of two portions of seafood a week in England. Impacts to include changes in the leading causes of death in England, e.g. cardiovascular health, etc.	AMBER	The first phase of research is currently being peer reviewed. Phase 2 requires external funding to investigate effects of increased seafood consumption by demographic group in relation to a range of wellness indicators built on the research already delivered in 2020 for cancer and Type-2 diabetes.
7	Continue to build on the shared understanding of the barriers and opportunities around seafood consumption growth as developed by Seafish and communicate the findings with partners. Support Love Seafood by Seafish with English national, regional and / or local-level initiatives, projects and campaigns that promote the seafood industry including any government or industry export strategies.	AMBER	The Love Seafood initiative, a consumer growth strategy developed and managed by Seafish, builds on this recommendation and seeks to influence consumer attitudes towards seafood over the long-term. Seafish updated the SILG on the various campaigns under the Love Seafood brand (Scampi in May 2021; Fish and Chips in June / July 2021; Fish in Foodservice in August 2021). In the first 6 months (Oct 2020 – March 2021), five million people engaged via social media, and 120,00 consumers visiting the Love Seafood website. The brand featured at least 220 times in the UK press. Several SILG members (e.g. Youngs) promoted the campaigns on social media.

8	Explore options that will support a domestic market demand for a wider variety of English-caught species and farmed fish and shellfish.	AMBER	<p>The new Love Seafood initiative by Seafish aims to increase domestic demand for all seafood and features species caught around England (and the UK). Also, Seafish are exploring options with Defra to support England’s domestic market for English caught and farmed seafood.</p> <p>English fishing businesses such as the Cornish Fish Producers Organisation and Fish Local in Kent and Essex have developed domestic caught fish box services to supplement their income and generate interest in fish from English waters as a result of the global pandemic and the impact on exports and the decline in the domestic foodservice sector.</p> <p>Some retailers have developed domestic seafood initiatives to increase purchases and consumption. The SF2040 Secretariat continues to explore these with the retailers in order to see how they may align with the Programme.</p>
9	Help to maximise the potential benefits of the economic link license condition for coastal communities and the wider seafood sector by working collaboratively with Defra, MMO and wider industry to consider what more can be done to utilise resources better and reflect on the effectiveness of the changes being introduced from 2022 and identify what opportunities there may be to extend the existing framework and support investment in measures to enhance the sector such as skills and training, scientific research, and new entrants.	AMBER	<p>Defra consulted on the economic link in 2020 and will publish the results by end of 2021. Defra will begin to implement the proposals in the government response in 2022. There will be an increase in the landing requirement and a strengthening of the link to see more fish landed in England (and the UK). Proposals include domestic fisheries reform, not just changes to economic link. This recommendation dovetails with Rec 8.</p>
10	Support England’s seafood industry and government implementation of the Fisheries Act 2020.	AMBER	<p>One aim of the SF2040 Programme is to facilitate and support the implementation of the Fisheries Act in relation to fisheries and aquaculture. Collaboration with government and industry and highlighting their work as well as providing a platform for ongoing engagement are ways in which the Programme can assist.</p> <p>The SILG approved £20k for the Ecological Risk Assessment of Mixed Fisheries in the South West. The purpose of the ERA is to improve the information about the non-taxed (non-quota) stocks in the SW.</p> <p>Seafish have a fisheries management work programme that includes the following:</p> <ul style="list-style-type: none"> • National Shellfish Fisheries Plan (through Seafish facilitated Shellfish management groups) • Establishment of research plans for key shellfish species

			<ul style="list-style-type: none"> • Convening industry/government and research community to work on issues affecting this important sector. • Working on options to manage non-quota stocks and providing data analysis to inform these options • Ecological Risk Assessment (South West) • Key contributor to work in Project UK FIPs <p>Defra are working with the Devolved Nations to draft the Joint Fisheries Statement. The Regional Fisheries Groups continue to progress, engaging in discussions on collaborative science with Cefas, and considering priorities and ways that Fisheries Management Plans (FMPs) can be organised.</p>
11	Work with Producer Organisations (POs) to build on their strengths and improving where necessary and exploring potential for new responsibilities.	AMBER	Defra and the MMO regularly meet with UKAFPO and POs to understand their views on fisheries management issues and areas where improvements can be made.
12	Enhance the now established SF2040 Aquaculture Leadership Group (ALG) in its efforts to more widely represent English aquaculture, to encourage innovation and technology, and to support export and domestic growth. Provide strategic vision and support to enable the expansion of aquaculture. Aim to strengthen relationships between academia, industry, government, and regulators, and encourage collaboration.	GREEN	<p>The English Aquaculture Strategy (EAS) was published in Year 3. The Foreword was written by the Fisheries Minister, Victoria Prentis MP.</p> <p>Regional initiatives figure strongly in supporting aquaculture growth in the EAS, and we were delighted to see that the Dorset Coast Forum received MMO FaSS funding to develop a business model for a national aquaculture innovation centre. This is a critical action in the EAS and an excellent example of the external collaboration that help to achieve elements of the SF2040 Programme on behalf of the seafood industry. The SF2040 Secretariat are part of the project steering committee.</p> <p>Also, the development of an English aquaculture research strategy is underway with SF2040 ALG, Cefas, ARCH-UK, and MMO. Industry will determine the priorities to ensure that the research conducted meets their needs.</p> <p>Defra continues to work with industry, Seafish, and regulators such as Natural England, Cefas, and MMO on the resolution of farming Pacific Oysters and the export of live bivalve molluscs to Europe, and the development of a macroalgae regulatory framework.</p> <p>Seafish continues to facilitate the Shellfish Stakeholder Working Group which works on improving water quality to support the growth of the aquaculture industry in the UK. It provides a forum to evaluate regulatory issues and industry priorities and exchange expert advice with government and agencies.</p> <p>The Seafish Responsible Sourcing team and Defra aquaculture team are active members of the Aquaculture Leadership Group and provide updates at meetings. The</p>

			<p>government and industry membership at ALG maintains an awareness of the challenges and opportunities within the sector and anything that may impact positively and negatively. Also, the SF2040 Secretariat now meets monthly with those in Seafish that work in aquaculture matters (Responsible Sourcing, and Regulation) and with the Defra aquaculture team.</p> <p>The SF2040 Secretariat are planning a UK-wide aquaculture webinar using the All-Party Parliamentary Group (APPG) on Fisheries platform for October 2021. All Home Nations are discussing the state of aquaculture in their region, and the Fisheries and Aquaculture Manager at Sainsbury's will present on the growing importance of aquaculture.</p>
13	Facilitate the growth of the English seafood industry through the mapping of existing supply chain facilities and infrastructure against current and future needs including domestic aquaculture production. Consult the industry to develop a stock-take of where facility / infrastructure restrictions to efficient business exist. Analyse what further investment is required in 10 - 20 years (e.g. more temperature-controlled facilities) and include links to relevant development bodies such as LEPs to utilize the support they can provide in regional economic growth. Review seafood facility / infrastructure good practice in similar countries.	RED	<p>External funding is required to progress this recommendation. The SF2040 Secretariat has developed a proposal for work that investigates some of these issues at the regional scale, has identified a delivery partner and is searching for suitable funding to take the work forward. We hope to be successful in delivering some project work on this topic in 2022 (Year 4 / 5 of the Programme).</p>
14	Deliver a single cross-sector seafood training and skills plan based on identified needs and requirements including aquaculture. Ensure Post-16 skills plans are included and that they have work-based learning opportunities and meet the needs of the seafood supply chain.	AMBER	<p>The Seafish Safety, Training & Services team have reviewed the findings from the SF2040 funded research, England's Seafood Industry: Skills, Recruitment and Retention — Seafish, and will be implementing some of the recommendations that fall within the organisation's remit.</p>
15	Improve resilience across England's seafood supply chain to enhance flexibility and endurance during market demand and supply disruption and reduce impact on market access and price.	RED	<p>External funding is required to progress this recommendation.</p> <p>Some parts of the English seafood industry have demonstrated adaptability and resilience. For example, as mentioned earlier, during the first lockdown in the midst of the collapse of export and domestic foodservice demand, businesses in the English fishing sector such as the Cornish Fish Producers Organisation and Fish Local in Kent and Essex developed domestic caught fish box services to supplement their income and generate interest in fish from English waters.</p>
16	Maximise the value of the seafood resource that is going to uses other than human consumption alongside reducing food waste.	RED	<p>External funding is required to progress this recommendation in order to identify prospects for creating high-value by-products from residual resources for other</p>

	Investigate opportunities to both reduce fish waste and create additional value in other non-food related sectors for that waste.		<p>industries (e.g. pharmaceutical, cosmetics, etc.) and determine the potential 'size of the prize'.</p> <p>Seafish has an ongoing end of life fishing gear programme that supports elimination of non-food waste from the fishing sector.</p> <p>The SF2040 Secretariat has noted discussions on the non-food uses of macroalgae are increasing in number.</p>
17	Ensure English seafood is fully factored in the Government's export growth and promotion activities including Free Trade Agreements.	RED	<p>Seafish facilitates a UK-wide Seafood Exporter's Group. Given the demands of the EU-Exit transition and the global pandemic the SF2040 Secretariat did not work on the establishment of an English only group in Year 3.</p> <p>Also, external funding is required to progress this recommendation to examine the seafood export industry post EU-Exit through an analysis of gaps and areas for improvement that will build English export resilience and generate further global opportunities.</p>
18	Support and encourage the UK Government in the ongoing facilitation of favourable international free trade and preferential tariff agreements.	AMBER	<p>Defra continues to work toward increasing the number of UK international free trade agreements (FTAs) and continuity agreements. The notable agreements signed during Year 3 of the SF2040 Programme include Australia, and the EU-UK Trade and Cooperation Agreement (TCA).</p>
19	Examine the seafood import industry post EU-Exit through an analysis of gaps and areas for improvement that will build English import resilience and generate further global opportunities. Include the ongoing reviews of the tariff free quotas adopted from the EU and the implications of Rules of Origin (ROO). Ensure government and industry collaboration to facilitate seamless, transparent import processes into England that meet the seafood requirements of industry and consumers.	RED	<p>This recommendation will require external funding to commission and manage the research. Seafish provides updated support to the import industry through its Regulation team.</p>