SEAFISH

Note of Common Language Group (CLG) meeting held at Friends House, London. Thursday 22 June 2017

For the CLG minutes and meeting presentations see:
http://www.seafish.org/responsible-sourcing/discussion-forums/the-common-language-group

1. Welcome, introductions and apologies
Mike Kaiser (Bangor University and Chair of the CLG) welcomed everyone to the meeting.
Attendees

Alex Caveen	Seafish
Alex Olsen	Esperson
Alma Bonilla	Joseph Robertson Ltd
Andrew Nicholson	2 Sisters Food Group
Andy Matchett	Combe Fisheries Ltd
Angus Garrett	Seafish
Barry Harland	Whitby Seafoods
Caitlin Schindler	Lovering Foods Ltd
Catherine Murphy	Marine Management Organisation
Chiara Vitali	World Animal Protection
Chris Hayward	Kantar Worldpanel
Connor Black	Queens University Belfast
Dale Rodmell	National Federation of Fishermen's Organisations
David Jarrad	Shellfish Association of Great Britain
Emi Katoh	MRAG
Frank Fleming	Fisherman
Giles Bartlett	Sealord Caistor
Grant Stentiford	Cefas
Harriet Yates-Smith	Mindfully Wired Communications
Harry Owen	MCB Seafoods
Huw Thomas	Pew Trusts
Indrani Lutchman	Sustainable Fisheries Partnership
Jamie Davies	Pew Trusts
John Butler	Oscar Mayer Group
John Pinnegar	Cefas
Juliette Tunstall	IPNLF
Karen Green	Seafish (Minutes)
Katie Longo	Marine Stewardship Council
Katie Miller	ClientEarth
Kenny Coull	Scottish Fishermen's Federation
Kristin Sherwood	FishChoice
Laky Zervudachi	Direct Seafoods
Libby Woodhatch	Seafish
Marcus Coleman	Seafish
Mark McCombe	Caterers Choice
Martin Jaffa	Callander McDowell

Mary McCarthy	University College Cork
Matthew Sharman	Fera Science Ltd
Melanie Siggs	GAA/Sancroft International
Mike Berthet	Global Aquaculture Alliance
Mike Elliott	University of Hull
Mike Kaiser	Bangor University (Chair)
Mike Mitchell	Fair Seas
Mike Short	Seafood Industry Alliance
Nigel Edwards	Icelandic Seachill
Nigel Sainsbury	University of Exeter
Paul Leonard	MMO Appointee of the Sussex IFCA
Richard Boot	FishChoice
Richard Stansfield	Flatfish Ltd
Robert Lefebure	Marine Stewardship Council
Sam Stone	Marine Conservation Society
Stefano Mariani	University of Salford
Steve Hall	Avalerion Capital
Taku Kufa	New England Seafood
Toby Middleton	Marine Stewardship Council
Zoe Healey	Inventiv Health

Apologies

Aisla Jones	Co-op
Angela Doherty	CP Foods
Colin Charman	Natural Resources Wales
Claire Pescod	Marine Stewardship Council
Dave Robb	Cargill
David Moore	New England Seafood
David Parker	Young's Seafood
Dominic Collins	Youngs Seafood
Erin Priddle	Environmental Defense Fund
James Hind	Greenwich Forum
James Page	Lovering Foods Ltd
Jess Sparks	Seafish
Jim Masters	Fishing into the Future
Jonathan Shepherd	Seafish Board
Katrina Borrow	Mindfully Wired Communications
Mark McCombe	Caterer's Choice
Mike Brummitt	Regal Fish Supplies Ltd
Neil Auchterlonie	IFFO
Nick Neeld	The Big Prawn Company
Nicki Holmyard	Seafood Source
Phil MacMullen	Seafish
Richard Sharpe	Compass Group
Scott Johnston	Young's Seafood
Tom Pickerell	Sustainable Fisheries Partnership
Victoria McGarry	Compass Group
Walter Crozier	Seafish Science Advisory Group

2. Minutes from the last meeting held on 2 March 2017.
The final minutes were accepted as a true reflection of the meeting and have been added to the CLG web page. Attendees were asked to take note of the meeting

guidelines. In the following minutes Seafish will provide a link to the various presentations given at the meeting but not summarise the whole presentation. In the main we do not attribute the comments made at the meeting. Papers were sent round and tabled covering the activities of the other Seafish groups (Aquaculture, Discards, Ethics and Skates and Rays) and a list of forthcoming seafood events. A full list can be found on the Seafish website: http://www.seafish.org/about-seafish/news-and-events/events

Tribute to Jon Harman. Libby Woodhatch, Seafish.
Well-known seafood industry veteran Jon Harman died in April following a short illness. During the course of his career, Harman worked in the pelagic, whitefish, shellfish and salmon sectors, in production, processing and governance. He spent 11 years in the Seafish family as chief executive of Seafood Scotland and Director of Seafish. He introduced the concept of 'care of the catch' and weighing at sea to fishermen, which resulted in improved quality and price on landing. One of the many things he will be remembered for is challenging the status quo – he would have a cracking idea and then let others develop it. He created the Common Language Group (CLG) in 2007 as a forum to bring the entire supply chain together, to look at the science and develop evidence-based messages to counter the spurious claims being made by eNGOs. There were six people at that first meeting but within a year it had grown tremendously. Ten years later those same themes are still very current. He was a good friend and mentor to me and will be sadly missed. This view was echoed by Mike Kaiser. Jon was kind, welcoming and very humorous with a creative mind fond of 'ram-raiding' an idea. The CLG as it is now is a tremendous legacy.

Introduction to the Science Advisory Group, its role and the theme for the day. Mike Kaiser.
Today we are using the CLG meeting to present some cutting-edge scientific developments. This idea was put forward by the Seafish Science Advisory Group for a CLG that focuses entirely on cutting edge scientific advances in different areas of interest to the seafood industry. This idea was approved by the CLG Steering Group. Today the content has been slightly driven by who was available to speak.

<u>Disease detection</u>
1. New paradigms in aquaculture disease. Grant Stentiford, Reference Laboratory for Crustacean Diseases, CEFAS.
http://www.seafish.org/media/1698854/clg_clgjune2017_aquadisease_cefas2.pdf
Disease is the number one issue in limiting yield, reducing profit and preventing investment in global shellfish production and Cefas has been looking at new paradigms to deal with disease outbreaks and reduce the impact of disease to promote insurability of the industry. Aquaculture pathogenic-sequencing can look at the pre-emergent phase of the disease. Key conclusions:
- Disease is the major impediment to expanded/sustainable aquaculture production.
- Completion of the crop cycle will become a core measure of sustainability.
- Focus on mitigating outbreaks (rather than striving for 'freedom') may be a realistic target in some areas.
- Deciphering the aquaculture host 'pathobiome' being aided by emerging sequencing technology.

- Decentralised diagnostics can bridge gap between farmer, scientist and policy maker.
- The farmer is the keystone in facilitating surveillance and disease management – a process traditionally reserved for national Competent Authorities.
- Moving majority of industry to 'insurable' is critical.

Action: Circulate link to scientific papers.

2. Innovations in fish fraud detection using rapid evaporative ionisation mass spectrometry (REIMS). Connor Black, University of Belfast.

Connor explained the concept behind rapid evaporative ionisation mass spectrometry (REIMS), a technique first developed for cancer diagnostics. REIMS uses a surgical knife and fish speciation is very achievable using REIMS technology. A database is being produced – the validation of fish models with an external set of samples provided a 98.99% accurate classification. The results are instantaneous (1-2 seconds delay) – compared with 24 hours for DNA samples. There are also important time comparisons with conventional techniques (PCR). The markers for each species of fish are identifiable. There is potential for the catch method and geographic origin to be determined.

Discussion

- **Question.** What are the upfront capital costs for REIMS? **Answer.** REIMS is expensive so we are looking at options.
- **Q.** How much of an issue is fish fraud? **A.** Over the last five to six years there have been issues with pangasius, cod and haddock, particularly in foodservice. It is questionable as to whether this is deliberate or misinformed substitution. New legislation across Europe is helping to reduce this.
- **Q.** With Brexit looming and issues over the transport of shellfish where do we need to be in five years to help the consumer? **A.** We need to harmonise diagnostics across Europe. The presumption is that we will inherit a similar legislative system. We have to emulate what is already in existence if we are going to continue to trade as we do now.
- These two talks have flagged up two different techniques. The speed with which REIMS will work to tell you what a sample could be a major benefit in volume production. DNA testing can do the same thing and will catch up however I can see the real benefit in REIMS in that it can look at the freezing aspect which DNA testing cannot, and could be used more for quality-testing. The technology is improving all the time and will eventually become cheaper. Typically DNA bar-coding costs £5.00 per sample. REIMS is not available commercially yet and the cost is front end at the moment with the capital outlay for the equipment.
- **Q.** With disease reduction and shellfish production is there any spill-over into the environment? **A.** There is very little evidence about spill-over into the local environment and its effect on the wild population around farms. This is a big challenge for aquaculture – to introduce more natural traits to emulate natural ecology and help prevent disease spread.

Fisheries Science
3. Fisheries and aquaculture climate science – Potential impacts, adaptation and mitigation - overview of current scientific knowledge and cutting-edge developments. John Pinnegar, CEFAS.
http://www.seafish.org/media/1698860/clg_june2017_fish_aquaclimatescience_cefas2.pdf

The Climate Change Act 2008 made the UK the first country in the world to have a legally binding long-term framework to cut carbon emissions. It also created a framework for building the UK's ability to adapt to climate change. In December 2015, Seafish, together with Cefas and the UK Marine Climate Change Impacts Partnership (MCCIP) published an Adaptation Reporting Powers (ARP) report. The group is now waiting to publish its latest report 'Climate change adaption in the UK (wild capture) seafood industry'. The North Sea has been named as a 'hot spot' of climate change. It has been noted there is a strong 'subtropicalization' of the North Sea where warm-water species with smaller maximum body size have increased in abundance. As examples: cod recruitment has been very low over the last few years probably due to the warmer conditions; in 2006, mackerel was first observed in significant amounts east of Iceland as bycatch in the Norwegian spring-spawning herring fishery. Habitat models have been developed to predict future changes in distributions of many marine species. Such models examine the relationships between key climatic variables and species distributions, mostly based on historical distributional data. In addition by understanding how fisheries have responded to adverse weather in the past, we can try to anticipate how the industry might be impacted in the future.

Actions: Look out for:
3.1 A climate change 'watching brief' document from Seafish and Cefas.
3.2 A new Adaptation Reporting Powers (ARP) report on climate change risk and adaptation in the aquaculture sector in 2018.
3.3 A new report from the UK Marine Climate Change Impacts Partnership (MMCIP) end July 2017
3.4 Outputs from two EU projects focused on climate change, fisheries and aquaculture – CLIMEFISH and CERES

4. Data Limited Methods for stock assessment – what's new and exciting. Katie Longo, Marine Stewardship Council.
Large parts of global catch are unassessed however Data Limited Methods (DLMs) can estimate stock health with simplified models, using easily accessible information (e.g., landings, stock type, etc.). Different models have been tested including catch only methods and a model to stimulate deterministic stocks and different models work best for different stock types. The new MSC Data Limited Methods project is leveraging a decision support tool to select assessment and management options Fish Path (The Nature Conservancy), as well as modifying the DLM tool simulation tool (Natural Resources Defense Council) to run management strategy evaluations which have been tuned to MSC fishery standard requirements. The project started on 1 May 2017 and the expected outputs are simulation analysis and comparison with assessed stocks in US, Canada, Caribbean and four case-studies on the ground in Mexico, Peru, Spain and Australia to engage with stake-holders and test the tools.
Action: Circulate links.

5. Trawling: finding common ground for best practices. Mike Kaiser, Bangor University.
http://www.seafish.org/media/1700961/clg_june2017_trawlingbestpractice_kaiser.pdf
The project is looking at specific knowledge-needs and in particular: where trawling occurs, how much and how often; what trawling does kill and what modifies this; developing a method to do a risk assessment; whether trawling affects fish production; formulating a policy for 'best practice'. As an illustration of the power of the CLG at a recent CLG meeting Alex Olsen demonstrated the use of lights to improve selectivity, an idea that was picked up by Young's Seafood and has now progressed to commercial

trials. VMS data has improved our knowledge level, but VMS data is not universally available, however when it is it can show the trawl footprint of a given area with green showing the area that is not trawled and yellow where it is only fished once every 10 years. A tool to support P2 of the trawling project has been completed and a training workshop is planned. In addition next steps include a tool for MSC to assist accreditation bodies undertake formal assessment of P2 trawl impacts on the seabed. This will make assessment of this issue consistent and more transparent.

Action: Circulate link to fisheries paper.

Discussion

- **Question.** Looking at UK aquatic demand and supply and the expansion of aquaculture has there been any research comparing the wild capture dynamics over a given area compared with farmed salmon dynamics? **Answer.** So far we have looked at energy consumption but would also need to consider the feed aspect if the feed came from demersal fish. In terms of animal production systems and life cycle analysis wild capture fisheries come out very well as there are no inputs. MSC does have a separate assessment tree for wild salmon.
- **Q.** Have you looked at how much time animals on the seabed have/need to recover and if fishing activity ceased would the fish recover? **A.** This would depend on the developmental stage of the stock and the ability to dictate the timeframe.
- **Q.** Has ocean acidification been addressed within the climate change work? **A.** Yes there have been Defra and NERC-funded projects which have looked at this.
- **Q.** What is the future of DLM? A. it is the information and the management strategy evaluation that is paramount. We need to make the analytical world talk to the practical world.

The science of consumers

6. Social media and seafood. Zoe Healey, Inventiv Health.

http://www.seafish.org/media/1698863/clg_june2017_socialmedia_seafood_inventivhealth.pdf

There is a tension with communicating seafood science between the desire for transparency, which can be supported by science, and the mistrust of science with increased prioritisation of opinion and feeling. Accessibility and transparency are key and the seafood industry needs to demystify science and use messages that all can understand to put them in context. Social media can provide loads of insights and allow the industry to tailor its messages. It is possible to see what topics people are interested in by observing social media data, it also shows where they are going for information and where they are engaging most. Campaigns can be tailored to ensure we are reaching enough of the people we need? That they are then doing what we want? e.g. buying and eating more fish more often. Triggers of behaviour can be very useful in determining what encourages people to eat. People are more likely to act if they are told/see that the majority of people like them are already doing something similar.

7. The changing face of Grocery in 2017….. Chris Hayward, Head of UK Business Development, Kantar Worldpanel.

http://www.seafish.org/media/1698866/clg_june2017_changingfaceofgrocery_kantar.pdf

Key points:

- There are 30,000 lines on offer to consumers and on average each customer chooses no more than 300.

- There has been much written in the press about the growth of Aldi and Lidl (they in fact have the perfect demographic spread) but Waitrose and M&S are also doing well. There is also growth at Iceland – which is very different to the rest of the market as the majority of their success comes from increased prices and new customers, while they actually decline through frequency. Sainsbury's decline is driven by lowered volume per trip as they change their promotional strategy.
- There has also been talk about consumers shopping more frequently. The change has been that the main weekly shop has become smaller and the much smaller top-up shops have become larger.
- Own label has been helped by the channel shift towards the discounters. At a time of trading down, actually the most expensive lines doing best and there is still growth at the top end of own label offerings.
- The Total Frozen Market is worth £5.8bn and is in growth of 1.4%. This performance has been driven by existing shoppers purchasing more often and paying more when they do so. "The Power of Frozen" is helping families manage their budgets in times of financial uncertainty.

8. Recognising the significance of consumers' lived experiences: a basis for understanding and leveraging emerging food demand. Mary McCarthy, Cork University Business School.
http://www.seafish.org/media/1698869/clg_june2017_consumerslivedexperience_mccarthy.pdf
Key points:
- There is a complex interplay between the environment and the individual. The macro environment sets the broad context of what is possible and appropriate, and the micro can steer the person to particular product and brands. Individual differences dictate the ultimate choices but individual response are not easily predicted or understood. This leads to many challenging questions that cannot be answered by any one simple research approach.
- Food choice motives evolve over time as do the products that are used to satisfy these.
- Complex interactions between the individual and their environment (social, built and food etc.) over time provide some explanation for observed patterns of behaviour and potential patterns of behaviour.
- Leveraging multiple data points linked to biological, psychological and environmental characteristics allows for the unfolding of a rich tapestry of food meaning which leads to a greater appreciation of food choice trajectories.

Discussion
- **Question.** You have not addressed what is going to happen in the future – is online shopping the way forward? **Answer.** Three in 10 people shop online once a year for food for convenience. An aging population is unlikely to change its shopping habits. We can paint future scenarios but the real trigger is anticipating what is the big disruptor that will make people change their behaviour. We can paint scenarios, but these are not inevitable as so many motivators are completely unconscious. For consumers to change their behaviour the benefit has to be substantial and the cost minimal.
- Over the last few years the food buying trends within seafood most obvious to me are more people shopping online, fresh fish already skinned and vacuumed, and fish imported from another country. Change is happening faster than we think and consumers are more open to experimentation.

- **Q.** Social media is a vector for fake news but scientists are being forced to use social media more and more. How do we deal with inaccurate news reporting? **A.** There is a lot of information out there and Twitter is not really the right place. This is where the activists are most active. There has to be a multi-faceted approach to communication.
- **Q.** How important is trust in a brand? **A.** Consumers just 'expect' the assurance - it is only if there is an issue that the consumer will ask questions.
- **Q.** Should we focus on sustainability or provenance? **A.** Provenance seems to be more important for other proteins – for fish it is sustainability

9. Retirement of Phil MacMullen. Mike Kaiser.
Phil MacMullen, Head of Environment at Seafish and a founding member of the CLG is retiring at the end of June. Phil started his Seafish journey with the White Fish Authority in 1977 designing low drag trawls at the (now-decommissioned) Flume Tank. His highlights:
- Fisheries development in the Arabian Gulf and Pacific Colombia
- Working in most sectors of the supply chain, geartech, shellfish, aquaculture, training, marketing, communications.
- Helping to bring fisheries, seafood, environment and conservation together
- Laying the ground for RFS and CLG
- Working with so many amazing people and helping us all move in a better direction!
- Persuading 6670 members of the WI in the Echo Arena in Liverpool of the merits of bottom trawling.

10. Date of next meeting
The next CLG meeting will be on Thursday 16 November 2017 at Friends House, London. The Common Language Group Steering Group will be discussing the agenda.
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11. Find out all about FisheryProgress.org http://fisheryprogress.org/
Fishery Improvement Projects (FIPs) throughout the world bring fishermen, suppliers, retailers, and food service companies together with conservation groups and scientific experts to address environmental challenges in a fishery. Along with clear sustainability standards, public policy upgrades, and other interventions, FIPs make fisheries more sustainable by harnessing the private sector's power to incentivize positive change. But access to specific information about FIPs' progress has required searching dozens of websites. And even then, prospective buyers or conservation advocates faced inconsistent documentation and questions about the data's reliability.

The Conservation Alliance for Seafood Solutions and FishChoice released a first-of-its-kind resource in October 2016 aimed at helping seafood buyers make better and easier sustainable sourcing choices. FisheryProgress.org is a one-stop-shop for reliable information on the progress of fishery improvement projects worldwide, using standard metrics to assess progress, and ensuring that data is independently verified. In this session, we will walk participants through the purpose of the website as well as the impact that it has had to date on improving FIP progress tracking and how industry is using it to strengthen their efforts to source sustainably.