

## **Note of Pelagic Industry Issues Group meeting held at the Jurys Inn, Aberdeen Airport Hotel, Argyll Road, Aberdeen AB21 0AF. Thursday 27 September 2018.**

### **1. Welcome, introductions and apologies**

Malcolm Large welcomed everyone to the meeting.

Andrew Duthie	Klondyke Fishing Company Limited
Arina Motova	Seafish
Chris Ritchie	Northbay Pelagic
Derek McDonald	Aberdeenshire Council
Ian Gatt	Scottish Pelagic Fishermen's Association
Jennifer Russell	Anderson Solutions
Karen Green	Seafish (Minutes)
Malcolm Large	Seafish (Chair)
Marcus Coleman	Seafish
Robert Duthie	Denholm Seafoods Ltd
Scott McKenzie	Northbay Pelagic
Sinclair Banks	Lunar Freezing
Steve Mackinson	Scottish Pelagic Fishermen's Association

### **Apologies**

Allan Crockett	Klondyke Fishing Company Limited
Andrew Pillar	Interfish
Aoife Martin	Seafish
Brian Ibister	Shetland Fishermen
Ian McFadden	Scottish Pelagic Processors Association
John Anderson	Scottish Fishermen's Organisation
Robert Stevenson	Lunar FPO Ltd
Simon Leiper	Pelagia A/S

### **2. Minutes of last meeting. Malcom Large, Seafish.**

The minutes of the last meeting on 22 March 2018 were accepted as an accurate record of the meeting. All the actions arising from the last meeting have been addressed.

### **3. Mackerel tagging programme. Steve Mackinson, Scottish Pelagic Fishermen's Association.**

[http://www.seafish.org/media/1804889/piig\\_sept2018\\_mackereltagging.pdf](http://www.seafish.org/media/1804889/piig_sept2018_mackereltagging.pdf)

This covered why and how mackerel are tagged and how the data is used. Same tagging area is used every year with approximately 40,000 fish tagged since 2011 (roughly 6,000 per year). This helps provide some context to stock assessments. Mackerel have been tagged since the late 1950's but the way this is achieved has changed since 2011 with radio frequency (RFID) tags now being used. There is a lot of Scottish input to this work. The programme does assume that the proportion of tagged fish is distributed evenly across the whole stock. In 2017 there was a benchmark of the mackerel stock for the first time this included RFID tags.

#### Discussion

- **Question.** Is there a danger of the tag remaining in the body as it is placed in the body cavity? **Answer.** There is a very minimal risk. Last year one in total was detected.
- **Q.** Are the tags re-useable? **A.** They are very small so you never find out and the unit price is low.

**Action:** Look at link <http://smartfishmap>

#### 4. ICES advice on widely distributed fish stocks (EU and NEAFC and fishing opportunities for 2019. Steve Mackinson. SPFA.

[http://www.seafish.org/media/1804892/piig\\_sept2018\\_icesadvice.pdf](http://www.seafish.org/media/1804892/piig_sept2018_icesadvice.pdf)

This covered the ICES advice for blue whiting, Atlanto-Scandian herring, horse mackerel and mackerel. An interactive PDF will follow.

- For blue whiting ICES advises that when the long term management strategy agreed by the European Union, the Faroe Islands, Iceland and Norway is applied, catches in 2019 should be no more than 1,143,629 tonnes. Blue whiting is always on a cycle but this indicates a downward trend.
- Atlanto-Scandian herring advice has been delayed until October after an evaluation of the candidate management plan. It is likely the TAC will be set in November. The stock seems to be following the same pattern as last year.
- Western horse mackerel is levelling out. There is low fishing mortality, sporadic recruitment and the stock is struggling to recover.
- Biomass is going down for North East Atlantic mackerel and has dipped below the biomass trigger level. All surveys point to the same general trend but the actual levels are a source of uncertainty.

#### Discussion

- **Question.** Has the mackerel stock moved? **Answer.** A number of factors are taken into account in the stock assessment and multiple data sets are used. The assessment will track the age structure of the catch. It is difficult to see that a shift in location is a major factor.
- The skippers view is that the mackerel are deeper and so are not being caught in the same trawl, and that they have spread out so the density is different. There is recognition that the stock has declined but not to the extent that ICES are claiming. Very few small fish (200g-300g) are evident so the average size is higher.
- The assessment is seen to be uncertain and there are some questions over the mackerel tagging specifically the assumption that 90% of fish die due to tagging with the new RFID tags and 60% with the old steel ones, whereas experimental studies suggest it should be closer to 20%. This could have an impact on the population estimate. As a result there will be trials of scanner efficiency in October/November, experiments on tag mortality and an investigation of the equal mixing assumption.
- **Q.** Tagging is currently voluntary – what if it became mandatory? **A.** If it worked precisely it would be great but at the moment there is a huge debate over it and this has to be resolved or ICES will discount the information. This has to be about the quality of the data, rather than what the data is showing.
- The proportion of tags that are being returned is going up. If the tagging mortality is higher it means that for every fish that were tagged fewer fish are 'available' to return. So, those that did return comprise a larger percentage of the population (so the encounter rate is high) and the estimate of the population is smaller.
- The mortality depicted in the models is unseen scanned fish. The question is whether they are dead or just not being seen.

**Action:** Circulate link to interactive PDF.

#### 5. Progress on FIS020 Project. Feasibility study on an industry self-sampling programme for the pelagic sector. Steve Mackinson. SPFA.

[http://www.seafish.org/media/1804895/piig\\_sept2018\\_selfsampling.pdf](http://www.seafish.org/media/1804895/piig_sept2018_selfsampling.pdf)

The aim of this project is to establish pelagic fishing vessels as research platforms, mapping changes in the abundance and distribution of pelagic fish, also to work with fish factories to promote the collection of scientific biological data on pelagic fish. A pelagic self-sampling feasibility report is due to be published shortly. A PHD student will be looking at: training, implementation, data analysis and feedback, as well as the implications for stock assessment when length and weight sampling every haul compared to existing market sampling; what the findings mean for the design of an effective industry self-sampling

scheme; and technologies that can make self-sampling (on vessels/at factories) efficiently provide good quality data. The aim then is to develop a policy framework/Data Collection Strategy with Marine Scotland to look at the utilisation of scientific quota, and to develop and apply industry data collection.

#### Discussion

- **Question.** Is there a lot of co-operation with all of this? **Answer.** Yes very much so from the factories and there are a number of early-adopter vessels, others are keen but waiting to see.

**Action:** Circulate link to feasibility study report when published.

#### **6. MSC developments. Ian Gatt, Scottish Pelagic Processors Association.**

Annual audits are in place for mackerel, blue whiting, Atlanto-Scandian herring and western Scotland herring. The Pelagic Freezer-Trawler Association North Sea herring and Scottish Pelagic Sustainability Group Ltd (SPSG) North Sea herring has been subject to re-assessment and the surveillance report was published on 13 November. This concluded that the fishery continues to meet the MSC Certification Requirements, and that MSC Certification should continue with annual surveillance audits.

**Action:** Circulate link to surveillance report.

#### **7. Economic evaluation of the EU/Faroe Islands bi-lateral agreement. Jennifer Russell, Anderson Solutions.**

[http://www.seafish.org/media/1804898/piig\\_sept2018\\_eufaroeanalysis.pdf](http://www.seafish.org/media/1804898/piig_sept2018_eufaroeanalysis.pdf)

In the review of the 2017 EU-Faroe agreement not much has changed since previous analyses. The analysis of the EU-Fisheries bilateral agreement shows that the Faroese fleet makes significantly more use of the fishing possibilities provided under the agreement than the EU fleet does. Of greatest importance to the Faroese fleet is the pelagic fishing possibilities in EU waters provided under both the quota exchange and access entitlement elements of the agreement. For the first time since the analysis began in 2014, the estimate of the potential sales value of the fish that can be landed from the quota exchange is notably different. The estimated potential value to the EU from the quota provided by Faroe in 2017 is £10m, whereas the estimated potential value to Faroe from the quota provided by the EU is £13m. The estimated sales values of landings made by the UK, EU and Faroese fleets from the quota exchange element of the agreement in 2017 are:

- £1.6m of landings by the EU fleet, of which £1.5m was landed by the UK fleet; and
- £2.3m of landings by the Faroese fleet (excluding any landings made from Greenland waters).

In terms of uptake of access entitlements, the estimated sales values of the landings made from the other party's waters are:

- £5m of landings of EU pelagic quota was made by the EU fleet from Faroese waters;
- and £45m of landings of Faroese pelagic quota was made by the Faroese fleet from EU waters.

#### Discussion

We need to focus on the most valuable parts of the EU/Faroe agreement and use this as part of our negotiations. This is now linked with the ongoing Brexit negotiations and questions over the Russian ban and why the Faroes get an exemption from Russia.

**Action:** Circulate link to report once published.

#### **8. Seafish Trade and Tariff Tool in Tableau (TTTT). Arina Motova, Seafish.**

[http://www.seafish.org/media/1804901/piig\\_sept2018\\_trade\\_tarifftool.pdf](http://www.seafish.org/media/1804901/piig_sept2018_trade_tarifftool.pdf)

The purpose of the TTTT is to develop a self-service system that will enable seafood businesses to access UK trade and tariff data at product and country level. Mackerel trade analysis for frozen whole mackerel was presented as an example. This was presented as a first draft version with Seafish now looking for feedback from industry. Two views were illustrated showing import and export data and their trade flows. Industry would be able to

access this information directly without having to go through Seafish. Seafish will share the software to enable this to happen.

#### Discussion

- **Question.** Where is the data from as UK Government statistics are 'wobbly' at their best and don't always reflect the true picture i.e. the Netherlands is not a major importer or exporter but a hub, the fish could be landed outside the UK and therefore would not be fully reported in UK stats? **Answer.** We have used trade data from the EU Market Observatory and UK Government statistics but would agree that trade flows are complicated.
- The pelagic industry has been screaming for data for years. What we need to do is to compare this data that has been presented with the data the industry itself has (monthly trade stats are produced) so that we can be confident that it is as accurate as possible. **Answer.** Seafish could explore adding the monthly trade stats (at the moment the data is annual). Industry could share data from the top four companies.

#### Actions

- Seafish to share the software and the mackerel file.
- Arina will liaise with SFPA and Robert Duthie to progress this.

### **9. Seafish labour survey (update). Arina Motova, Seafish.**

[http://www.seafish.org/media/1804907/piig\\_sept2018\\_laboursurvey.pdf](http://www.seafish.org/media/1804907/piig_sept2018_laboursurvey.pdf)

Depending on the size of the business there is a major dependency within the pelagic processing sector on EU nationals, and a lot of seasonal employment. The Seafish survey has looked into the reasons for this.

#### Discussion

- **Question.** How do you define skilled? **Answer.** It is not about their qualifications but what they are doing in their job.
- It is likely any subsequent surveys will show a worsening picture and Government does not seem to be taking this seriously. Seafish should be making a noise about this. **Answer.** This was raised at the Seafish Board meeting this week as a key issue that Seafish should be supporting the industry to address. Whilst Seafish cannot lobby it can provide Government with all the facts and figures and is doing so. The seafood sector in Scotland is one of many issues with potential issues – there are other regions and other industry sectors.
- It is worth noting that migrant workers are not unskilled workers and that automation does not always reduce the reliance on labour

**Action:** Circulate links to survey reports.

### **10. Export support and discussion. Malcolm Large, Seafish.**

- **Trade stand in Japan.** The Japan Seafood Show is not just about the show it is a hub for SE Asia. This is a good 'flag-waving' exercise and it was agreed this support should continue.
- **Trade stand in China.** Seafish will have a small reception stand at China Fish which will be manned by Seafish. It was agreed this support should continue.
- **Boston.** Seafish is not committed to a stand at Boston 2019 yet. The weather was a big factor this year. It was recognised that the side shows and events were a big draw.
- **Mackerel promotion.** Seafish has supported mackerel promotions through SDI and AEON and there are plans for February 2019.
- **Seafood Summit in Scotland in March 2019.** Seafish is planning to hold a Seafood Summit in Aberdeen on 26/27 March 2019. As part of this there will be an Exporters session.

#### Discussion

- It was felt it was not necessary to have separate SDI and Seafish stands and that a joint stand could be considered.

- The shows listed, plus Brussels, were felt to be the big ones.

**Action:** Any further feedback to Malcolm Large. E: [malcolm.large@seafish.co.uk](mailto:malcolm.large@seafish.co.uk)

#### **11. AOB and date of the next meeting**

The date for the next meeting was not set but is likely to be in late September 2019 in Aberdeen.