



Annual Plan

2019/20



Introduction

This is Seafish's second Annual Plan under our Corporate Plan 2018-2021 ([found here](#)). Our vision is for a thriving seafood sector and to achieve this Seafish is focused on working in partnership with the seafood industry right across the supply chain, to help businesses to successfully respond to a series of complex challenges¹.

1. The UK Seafood Sector includes all seafood landed or imported into the UK, all seafood consumed in the UK, and all seafood exported from the UK.

Our challenges

In 2018 the Seafish Corporate Plan identified five key challenges facing the UK seafood industry; twelve months on these challenges are still relevant. While work has been done to help the seafood industry to respond to these issues, and there is a great deal to be positive about when it comes to UK seafood, there is still more to be done.

Challenge 1:



A changing political, economic and regulatory landscape as the UK exits from the EU.

The seafood industry continues to face unprecedented change amid the uncertainty that exists over the UK's exit from the European Union (EU). Shifting dynamics in the overall UK business climate are affecting seafood businesses in both positive and negative ways. We now know that leaving the EU will alter existing seafood tariff arrangements and will create non-tariff barriers which will impact on the cost and the ease of importing and exporting seafood. Through our labour survey work we know that businesses are facing workforce supply constraints due to perceived changes to EU migration arrangements. While work is underway to develop alternatives to existing EU funding schemes there is still uncertainty around when such schemes will be available and the eligibility parameters that will apply. There are opportunities however; our departure from the EU means that the UK will no longer be part of the Common Fisheries Policy which presents an opportunity to create a new fisheries management framework that can address future access to the resource, industry-science cooperation and how environmental objectives are best achieved.

Challenge 2:

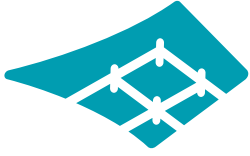


Stagnant consumer demand and strong competition from traditional and non-traditional proteins.

Although seafood is widely recognised as one of our healthiest and most sustainable protein foods, as a nation we continue to fall far short of the UK Government's consumption target of two portions per person a week. The sector is not fully capitalising on seafood's unique selling points and is being directly challenged by growing competition from other sectors for a share of the protein market, and from the growing popularity of plant based diets. Ensuring that the seafood industry has the capability and collateral to meet consumer preferences around convenience and availability, to capitalise on the health credentials of seafood, and to ensure that food safety and product integrity are not compromised is key. Seafood is also subject to a shifting industry image, influenced by media messaging and campaigning by Non-Government Organisations (NGOs), celebrities and journalists, which ultimately has an influence on consumer choice – the industry needs to be equipped to respond.

Our challenges

Challenge 3:



Competing with other food production sectors for access to a suitably skilled workforce, while addressing complex challenges around workplace safety.

The ability to achieve a thriving seafood supply chain is affected by workforce availability and capability. In common with other food production sectors, the industry is constrained by the available workforce across the UK, as well as by the potential for restricted access to overseas labour resources in the future. The sector has to contend with difficult working environments and at times dangerous practices, particularly at sea, which can result in lives being lost. These issues are increasingly played out amidst the trade-off between restrictions around labour availability and advances in technology.

Challenge 4:



Sourcing sustainable seafood in an increasingly competitive global market, alongside continued public concern over practices that compromise human welfare and the environment.

Global population growth and increased demand for protein, coupled with limitations in wild capture volumes are tightening supply conditions for the UK seafood sector. The ability of seafood businesses to respond to these supply constraints is shaped by consumer preferences, pricing and sustainability criteria. Key to this challenge is capitalising on the potential opportunities within the existing supply profile, such as aquaculture production, but also acknowledging and responding to the impact that increased global competition for seafood resources could have on future supplies. At the same time, the seafood industry must ensure that it retains and builds upon its hard earned advances in responsible sourcing; such as acknowledging and addressing the environmental impacts of seafood production, eradicating Illegal, Unreported and Unregulated (IUU) fish, adherence to seafood certification schemes and ensuring an ethical and transparent supply chain.

Challenge 5:



Successfully accessing the data, information and knowledge that will ensure the sector is equipped to understand and respond innovatively to a changing environment.

The challenges facing the sector are amplified by limitations in the availability of data, information, and evidence to support seafood businesses to understand and respond to changes in the wider operating context. Critical to this challenge is connecting the extensive research and innovation that is already occurring in the UK and beyond, to seafood businesses so that this research can be successfully transferred and commercialised and so that it can enable a thriving seafood industry.

How we will work

Our ability to successfully support the £10bn UK seafood sector requires us to be flexible and agile in our approach so that we can quickly respond to emerging issues. Over the last twelve months our commitment to assist the seafood industry to navigate the complex suite of business changes as a result of EU Exit preparation has been an example of this agility in practice.

Seafish is also committed to working collaboratively with our stakeholders to make sure our work programme has a practical application so that it can drive positive change on the ground; on fishing boats, at harbours, in processing businesses, in restaurants and in retail outlets across the UK and beyond. Integral to this is our:

- A** 'On the ground' engagement we provide through our national and regional committees;
- B** Work to (1) maintain the positive reputation and credibility of the industry and (2) to promote Seafish initiatives, through our Communications team;
- C** Facilitation of forums for sharing information and ideas;
- D** Tailored sector-wider engagement events;
- E** Active participation in stakeholder events in the UK and overseas to share best practice and identify opportunities for the UK industry.

Our national and regional teams have a key role in supporting the delivery of government supported strategies across the four UK administrations:





- A** In Wales we are directly involved in implementing the Wales Seafood Strategy which was developed by the Seafish Wales Advisory Committee (SWAC) with the support of Seafish and in collaboration with the Welsh Government. The Strategy outlines the vision for a thriving, vibrant, safe, and sustainable seafood industry for Wales focused on sustainable growth, increased employment, and improved fishing safety.
- B** The Scottish Seafish Advisory Committee (SSAC) will align its work programme to support the delivery of *Ambition 2030: A growth strategy for farming, fishing, food and drink* focused on assisting the Scottish food sector to reach its £30 billion target by 2030.
- C** Seafish Regional Managers in England will assist in the successful delivery of projects that contribute to the goals of the Seafood 2040 strategy as directed by the English Seafood Industry Expert Group.
- D** Seafish will continue to work collaboratively with the Department of Agriculture, Environment and Rural Affairs (DAERA) to progress projects to benefit local businesses through the Seafish Northern Ireland Advisory Committee (SNIAC).

We will also use our home nation and regional advisory committees to (1) communicate and progress the work delivered under each of our challenges and (2) to identify emerging issues that Seafish will need to respond to.





Our work programme for 2019 to 2020:

The Annual Plan 2019/2020 will once again be structured around the five key challenges detailed in our Corporate Plan, and will include:

-  **A** Activities that we agreed would start during 2018/19 but would not be finalised until 2019/2020 or beyond. These activities are marked in the current annual plan with an*. An example includes our project to assess the current and potential seafood resource available within the UK Exclusive Economic Zone (EEZ) under Challenge 1.
-  **B** Details of our 'rolling year' activities; those projects we deliver year in and year out. These activities are marked in the current annual plan with an~. Examples include our work to promote the fish and chip sector under Challenge 2.
-  **C** Details of activities that were scheduled to be completed during 2018/19 but will stretch into 2019/2020.
-  **D** New activities.

Not all activities will be completed during the twelve month period of this Annual Plan.

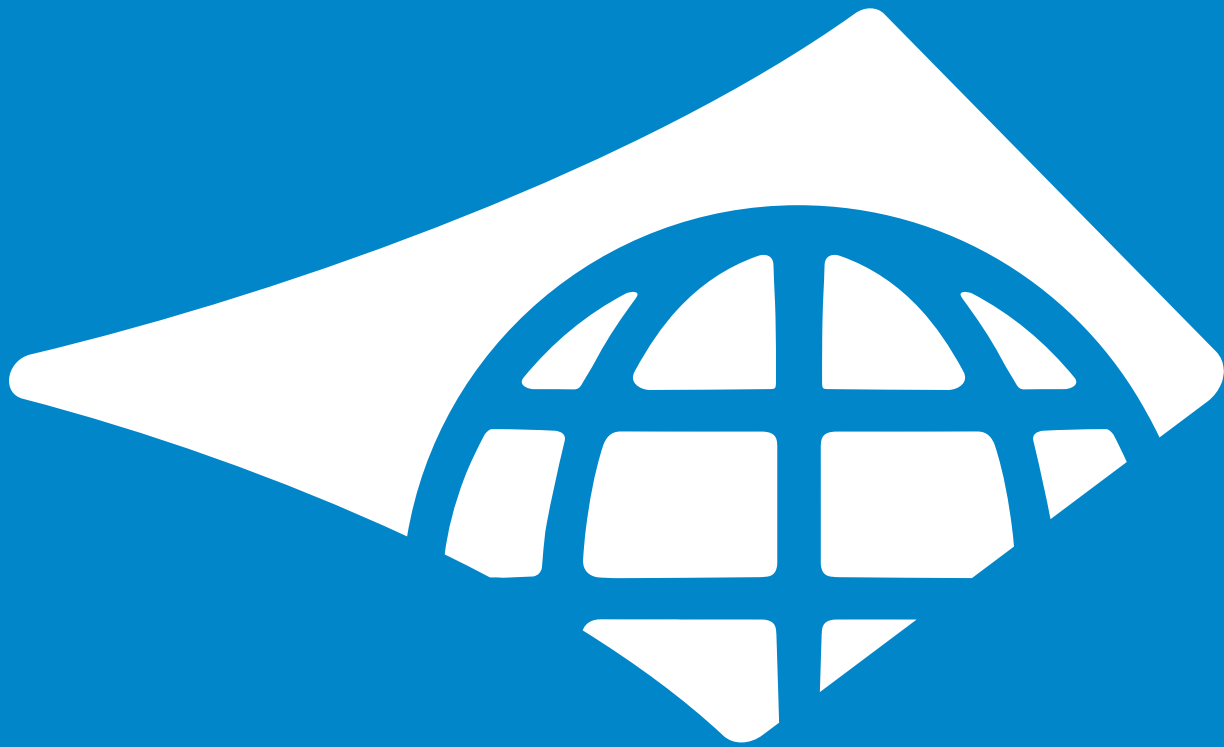
 **Activities marked ***
started during 2018 and will be finalised from 2019 onwards.

 **Activities marked ~**
are core work projects that will be delivered each year of the Corporate Plan e.g. providing economic advice or delivering the Risk Assessment for Sourcing Seafood.



Challenge 1:

The changing political climate
as we exit from the EU



Challenge 1:



The changing political climate as we exit from the EU

Seafish is focused on helping our seafood sector identify, optimise and secure business benefits from the process of the UK's exit from the EU, while successfully responding to the difficulties that such change will inevitably bring. To succeed, Seafish and our four government partners will need to work in close collaboration. Our programme of work during 2019/20 to support this challenge will include:

Key area 1: Governance and Marine Management

- A** Assess the current and potential seafood resource available within the UK Exclusive Economic Zone (EEZ) and the value of that resource through the seafood supply chain, so as to determine the contribution seafood makes as part of the wider UK and global marine resource.*
- B** Work collaboratively with industry, government and the environmental NGO community to ensure that decisions to protect the marine environment deliver the required environmental outcomes whilst having the least impact on the seafood sector. This includes monitoring regulatory developments (e.g. the Water Framework Directive, Marine Strategy Framework Directive and Marine Spatial Planning proposals) and reviewing new proposals (e.g. marine protected areas) to ensure they are appropriate and proportionate.*
- C** Working on fisheries management issues to ensure the UK has appropriate management measures in place (or under development) once it leaves the Common Fisheries Policy. This includes supporting the development of a fisheries management plan for scallops, and working, in collaboration with industry and government, to establish a framework for the future management of inshore fisheries.*
- D** Undertake an audit of inshore fishing ports across the UK to assess the availability and suitability of the facilities necessary to support a viable inshore fishing industry and a sustainable marine environment. [NEW](#)
- E** Facilitate regional and home nation engagement on the impact of the UK's exit from the EU through tailored sessions at our advisory committees.*

Key area 2: Seafood Markets and Trade

As the political and trading landscape changes, work in collaboration with our partners across the four administrations, to develop a comprehensive trade programme (covering imports and exports) for UK seafood to ensure the sector is equipped to take full advantage of the UK's new trading landscape.

- A** Act as a central point of engagement between industry and central government to:

 - i. ensure the unique needs of the seafood industry are recognised in any new import and export procedures; and
 - ii. provide easily accessible information on measures to facilitate the movement of goods through borders.
- B** Support industry to exploit new seafood markets by:



 - i. Producing guidance on product standards and trading requirements in the receiving countries.
 - ii. Facilitating a forum for Industry to discuss exporting issues with policy makers and regulators.*
- C** Map the export support opportunities available to seafood businesses across the UK and produce and disseminate guidance to enable industry to access the appropriate and available support to facilitate global trade. [NEW](#)
- D** Provide advice and guidance to assist government, as required, to ensure the needs of the seafood industry are adequately represented in agreements such as WTO, CODEX and FTAs.
- E** Provide practical advice to the seafood sector on changing import/export procedures including:

 - i. Develop, maintain and promote the *Seafish Trade & Tariff Tool* to enable seafood businesses to easily access and analyse UK trade and tariff data at a product and country level.
 - ii. Undertake periodic reviews of the implications for the seafood industry of EU Exit trade scenarios to identify key areas of exposure and their wider implications and to assist the industry to prepare and respond.*
- F** Arrange trade stands at agreed international seafood expos and facilitate UK companies' attendance at these shows so that they have the opportunity to engage directly with existing customers and potential importers. As part of this activity Seafish will work with our government partners to explore other trade promotion opportunities such as the ANUGA Food & Beverage Fair in Cologne, Germany and country specific trade missions.~
- G** Preparing export focused market insight information to support UK businesses to trade in new markets.*


Key area 3: Seafood Regulations and Standards

-  Work in collaboration with industry and central government to ensure that the transfer of EU regulations to UK legislation meet the needs of industry and where possible simultaneously meet the needs of our main trading partners without unnecessary burden on industry.~
-  Work in collaboration with central government across the four administrations to ensure that (1) where appropriate, there is an aligned rulebook across the UK to minimise regulatory divergence and (2) that business throughout the UK have advice and guidance appropriate to their business. This activity includes include business as usual regulatory work alongside EU exit changes.~

Key area 4: Labour Requirements

-  Deliver economic analysis, reports and advice on labour issues within the seafood processing and catching sectors across the UK to inform EU exit-related policy decisions.~
-  Through the Fishermen's Welfare Alliance, work in collaboration with industry and government to explore options to address labour shortages as a result of our exit from the EU. (e.g. visa options for non UK seafood workers (at sea and onshore)).* **NEW**

Key area 5: Accessing Public Funding

-  Provide advice and insight to help government target and prioritise future funding initiatives to replace the EMFF.*



Challenge 2:

Stagnant consumer demand and strong competition from traditional and non-traditional proteins



Challenge 2:



Stagnant consumer demand and strong competition from traditional and non-traditional proteins

Our goal is to facilitate the doubling of seafood consumption in the UK to two portions per person a week, which will in turn contribute to significant financial, social and health benefits across the UK. Inherent to this challenge will be ensuring that this increased consumption is achieved in line with wider sustainability and resource management objectives.

We will work with seafood businesses, and consumers, to encourage more people to eat more fish more often. Our programme of work during 2019/20 to support this challenge will include:

Key area 1: Defining and validating universally agreed messaging to ensure seafood's Unique Selling Points (USPs) are consistently and widely shared

- A** Convene and support the Marketing Optimisation Group (MOG), with membership including senior industry marketing professionals. While Sector Panels are responsible for proposing overall strategic approach to Seafish consumer marketing, MOG members will help develop, support and share consistent consumer messaging and marketing assets across the supply chain.~
- B** Ensure universal consumer messaging outputs developed through the MOG meet sector needs across the supply chain and across the UK (specifically supporting relevant home nation strategies such as Seafood 2040 and Ambition 2030).~

Key area 2: Devising and delivering consumer campaigns of value to the whole sector

- A** Develop and deliver targeted marketing campaigns, in line with our consumer marketing strategy, to promote seafood consumption in the UK and to encourage more people to eat more seafood more often.~
- B** Implement a collaborative partnership with Chef CJ Jackson at Billingsgate market to amplify Seafish consumer campaign activity, through generation of recipe content, media appearances and event sponsorship.~
- C** In collaboration with the Welsh seafood industry, support the delivery of the 'Welsh Seafood Market Development' project which is focused on enhancing the profile of Welsh seafood in domestic and export markets.*
- D** Promote increased seafood consumption, and awareness of the importance of the UK seafood sector to coastal communities, through a network of festival and events in collaboration with Seafish ambassadors and industry e.g. Dorset Seafood Festival, Balmoral Show in Northern Ireland, Portsmouth, and Hastings Seafood Festivals.~






Key area 3: Amplifying our '2 a week' messaging via our trade stakeholders

- A** Deliver an insight-led food service and retail focused Seafood Week campaign that aims to increase consumer awareness of the importance of eating seafood and works towards the '2 a week' target.~
- B** Deliver regional and home nation events to highlight and promote Seafood Week to industry stakeholders and consumers across the UK e.g. the Loaves & Fishes event in Northern Ireland.~
- C** Work with the fish and chip shop sector to continue to promote fish and chips as the UK's best take away option. Initiatives include:~
 - i. Convening the annual National Fish & Chip Awards 2020
 - ii. Supporting National Fish & Chip Day 2019
 - iii. Promoting our 'Enjoy Fish & Chips' brand across B2B audiences and launching material to enable businesses to promote fish and chips directly to consumers.
- D** In collaboration with the Fish and Chip Strategy Group develop, communicate and implement a strategic plan to drive growth in the sector over the next 5 to 10 years. **NEW**
- E** Develop brand neutral campaign assets (photographs, recipes, social media guides) for use by the whole supply chain. Initiatives include:~
 - i. Maintaining and promoting the Seafish Asset Bank, as the primary source of seafood marketing assets.
 - ii. Continue to offer support to key segments of the retail and food service sectors, through campaign-specific toolkits and digital content packs.

Key area 4: Educating and upskilling partners on the key USPs of seafood

- A** Build campaigns to promote seafood as a smart protein choice beyond the 'big five' (salmon, tuna, prawns, cod and haddock), focusing on topics such as the health benefits of increasing consumption. Initiatives include.~
 - i. Supporting and encouraging chefs to embrace seafood through our Young Seafood Chef of the Year Competition.
 - ii. Finalise and launch our 'sea to serve' training portal which is an online tool targeted at catering college students and aspiring chefs.
 - iii. Partnering with Billingsgate Seafood School to deliver seafood awareness classes focused on educating and upskilling industry and consumers alike.
 - iv. Supporting the restaurant trade by delivering 'The Seafood Restaurant of the Year' campaign, in collaboration with The Caterer magazine.
- B** Continue to develop initiatives to support the Seafish Ambassadors' Programme to maintain and grow a network of experts who will educate and upskill trade partners on the value and importance of seafood.~
- C** Deliver the 'Marketing Seafood through Education' programme in Northern Ireland to promote local seafood by working with local catering colleges and home economics teachers to improve seafood skills and ensure seafood is on the menu, and assess the merit of expanding the programme across Scotland as part of the Ambition 2030 Seafood Action Plan. **NEW**

Key area 5: Ensure the seafood sector is positioned to take advantage of the increased demand generated by our consumer promotion campaigns

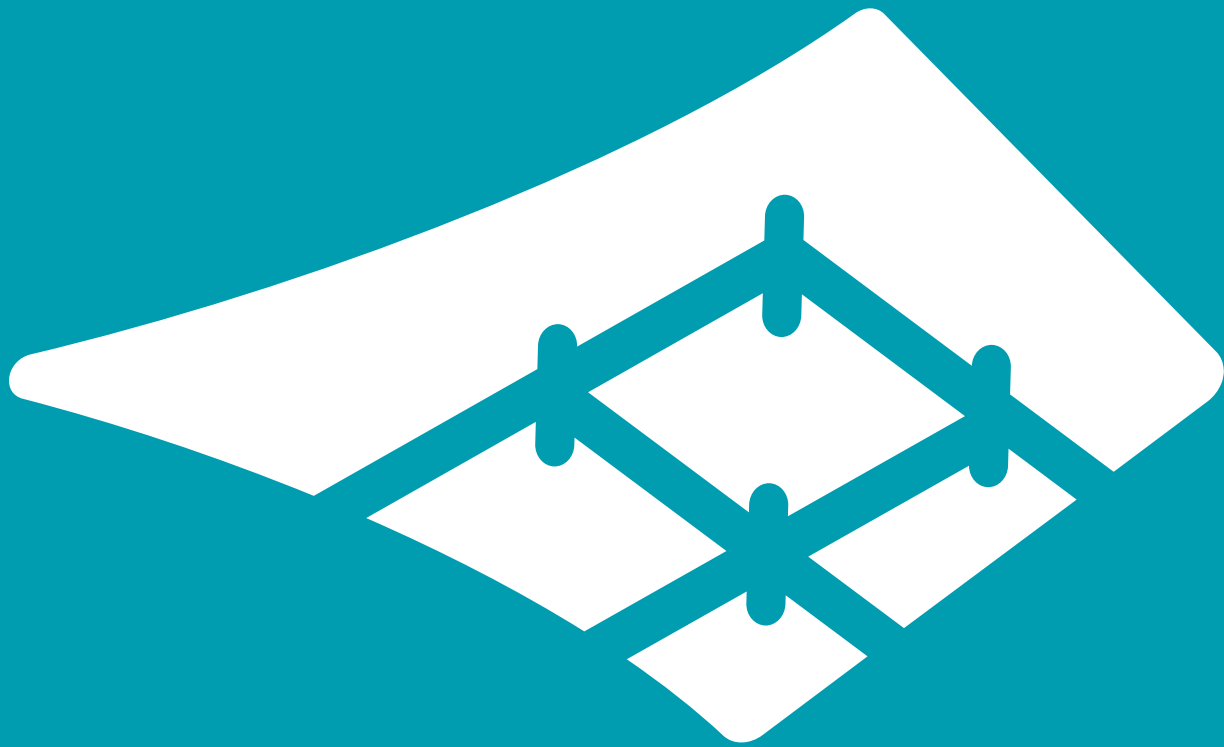
-  Provide seafood specific regulatory guidance on food matters to guide Seafish campaigns and to assist industry to comply. This will include guidance on protected designation, trademarks, health and nutrition claims and the application of advertising codes.~
-  Produce detailed generic and bespoke market insight information, covering retail sales and foodservice channels, to enable the seafood sector to anticipate or respond to consumer trends.^{2~}
-  Develop innovative outputs using market insight information to support the seafood sector to drive increased consumption. This includes simple guides on 'get to know the seafood market' and a 'seafood consumption' tracker.*
-  Engage collaboratively with the Marketing Optimisation Group to explore opportunities for new product innovation to help seafood compete successfully with other innovative protein products, and encourage the sector to engage in new product development.*
-  Investigate the different ways consumers purchase seafood in the UK e.g. supermarket, foodservice, fishmonger, online, mobile operators etc. in order to develop insight into what influences awareness and drives purchasing decisions, and how this information can be utilised by industry to encourage increased consumption.*

2 For further details of Seafish's market insight reports please visit the factsheet section of our webpage <https://www.seafish.org/article/market-insight>

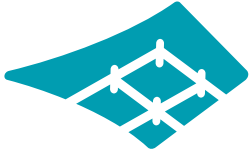


Challenge 3:

Attracting, retaining and developing sufficient skilled labour while providing a safe working environment



Challenge 3:



Attracting, retaining and developing sufficient skilled labour while providing a safe working environment

Our goal is to support efforts to eradicate all preventable fatalities and injuries at sea and onshore, and to assist the seafood sector to benefit from best-in-class skilled labour, supported by high quality training.

Our programme of work during 2019/20 to support this challenge will include³:

Key area 2: Establishing the seafood sector as an employer of choice

- A** Continue to support a network of Seafish-recognised training providers to deliver apprenticeship and other new entrant's programmes across the UK. Seafish will actively promote these schemes to employers and school leavers, and monitor feedback from participants and employers alike to ensure that the programmes are fit-for-purpose.
- B** Continue to develop a coordinated and informed campaign(s) to establish the seafood industry as a career focused sector and an employer of choice; targeted at school leavers, students seeking seasonal work, people returning to the work force. Including:
 - ◆ Working in partnership with the careers industry (job centres, recruitment agencies and direct outreach to job seekers) to promote opportunities.
 - ◆ Developing assets for seafood business to help promote career and employment opportunities in their own businesses.






Related to this is the need to focus on improving the brand image of the sector so that potential employees see it as dynamic, future focused and an attractive sector to be part of.*

- C** Continue to develop, promote and expand the Seafish Future Seafood Leaders Network to assist the seafood industry to identify, nurture and retain talent to support the next generation of young seafood executives to innovate and lead change in the industry.




Key area 3: Supporting the sector to create a safe working environment for all staff across the supply chain; from fishing vessels to fish processing factories to retail outlets

- A** Deliver a range of marine survey services to the sector to ensure vessel safety, including:
 - i. Surveying and certifying fishing vessels built to Seafish construction standards to ensure the vessel is constructed to a robust and high standard of operational safety.
 - ii. Providing advice to fishermen, boat builders and government partners on best practice in fishing vessel design and construction.
 - iii. Maintaining Seafish's fishing vessel construction standards and associate documents.~

³ Note that Key area 1: Supporting the seafood sector to source sufficient skilled labour to meet business demands will be delivered through Challenge 1.

-  Produce information and guidance material (e.g. FishSafe) on hazards at sea from the offshore oil and gas, subsea cable, and renewable energy sectors, to improve safety awareness amongst fishing vessel crew and to prevent accidents.~
-  Develop a new hazard alert system to deliver real time critical safety messages to the fishing industry on land or at sea. **NEW**
-  Collaborate with the MCA on preparations for the UKs implementation of the *International Maritime Organisations Convention on Standards of Training, Certification and Watch keeping for Fishing Vessel Personnel*.
-  Continue to collaborate with our partners in the Fishing Industry Safety Group (FISG) to deliver improvements in fishing safety by:
 - i. Supporting delivery of the FISG 10-Year Strategy to Eliminate Preventable Deaths in the UK Fishing Industry.
 - ii. Leading on the development and delivery of safety campaigns and the promotion of key fishing safety messages.
 - iii. Facilitating and enhancing the network of Fishermen’s Safety Forums in Northern Ireland, Wales and South West England and ensuring effective communication between these Forums and the FISG.
-  Develop a training and guidance programme to support good occupational health and safety practices for UK aquaculture businesses. **NEW**

Key area 4: Delivering sector-led training, in collaboration with our training partners, to enable industry to access appropriately skilled labour and build capability

-  Provide effective administrative support to Approved Training Providers (ATPs) to deliver fishing and onshore training programmes; including administering funding, maintaining training records, and providing expert advice and guidance on training issues.~
-  Undertake a review of the effectiveness and capability of the four existing Seafood Training Networks to ensure they are equipped to meet the seafood industry’s training needs, and explore if the training network model should be extended across the UK.
-  Develop new (and update existing) training course material in response to identified industry needs and to reflect the latest developments in safety and best practice. This will include:
 - i. Review/update of our 3-week Introduction to Commercial Fishing course for new entrants and our Under 16.5m Skipper Certificates for inshore skippers;
 - ii. Additional case study resources to support/enhance our food authenticity training programme and a model HACCP plan and supporting materials for fishmongers.

- D** Support, promote and encourage the take-up of mandatory and voluntary training by (1) skippers and crew working on UK-registered commercial fishing vessels and (2) employees in the onshore seafood businesses by:
 - i. Maximising available EMFF funds and securing match funding to continue to deliver a funded fishermen’s training programme
 - ii. Driving increased take-up of Seafish’s onshore training programmes by reinvigorating trainers, providers and employers, and ensuring that our programmes remain appropriate, relevant and fit-for-purpose.~

- E** Provide quality assurance, guidance and support to our UK-wide network of ATPs to ensure that it is delivering training courses in accordance with Seafish requirements and the needs of the sector.~

- F** Complete a strategic review of the seafood industry’s needs for the training of new entrants and workers, evaluating the effectiveness of Seafish’s support and producing a plan outlining how our future support can be targeted for maximum impact. **NEW**

Key area 5: Supporting the sector to explore the trade-offs between new technology, mechanisation and traditional labour resourcing

- A** Building on the automation/labour profile for the domestic industry engage seafood operators to explore how automation/labour may develop and shape their operations into the future, and establish collaboration with relevant partner organisation to undertake a comparative study of mechanisation amongst SME processing businesses.*

- B** Deliver a series of seminars during 2019/2020 that will provide a platform to share learning and development of innovation and automation initiatives from across the supply chain. This will provide an opportunity to showcase cutting-edge examples of automation initiatives from across Europe so as to drive more sustainable business practices and to provide alternatives to traditional labour options. **NEW**



Challenge 4:

Balancing the need to secure sustainable supply while ensuring we meet consumer demands for supply chain integrity



Challenge 4



Balancing the need to secure sustainable supply while ensuring we meet consumer demands for supply chain integrity

Our goal is to work in partnership with seafood stakeholders to secure the broad supply base required by the UK industry, and to support the responsible sourcing and supply chain integrity demanded by UK consumers. Seafish considers that a sustainable and responsible seafood sector is the minimum standard that all parts of the supply chain should adhere to.

Our programme of work during 2019/20 to support this challenge will include:

Key area 1: Supporting growth in aquaculture as a key source of supply

- A** In collaboration with the aquaculture sector and regulatory agency partners, establish a protocol to facilitate engagement and co-existence amongst competing marine users.*
- B** Provide support to a network of devolved aquaculture leadership groups, and related UK-wide initiatives such as the Seafood 2040 Aquaculture Leadership Group.~
- C** Complete an economic assessment of UK aquaculture sector to demonstrate the potential value the industry could deliver under a range of scenarios, including non-food applications. **NEW**
- D** Working alongside the UK industry, regulators and the research community, develop an on-line 'one stop shop' resource that can provide new entrants with the necessary information to establish a new aquaculture business. **NEW**
- E** Continue to provide accurate and accessible information on aquaculture practices to promote public awareness and to inform consumer choice. Initiatives include maintaining and expanding Seafish's series of aquaculture profiles.~
- F** Facilitate the Shellfish Stakeholder Working Group as a mechanism to bring industry and government agencies together to work in collaboration on water quality issues that are affecting the growth of the shellfish sector. A priority initiative will be the successful delivery of the project to develop an assurance scheme for shellfish and human health.~
- G** Work in collaboration with industry and government agencies to ensure the regulatory regime to deliver water quality recognises and enables the aquaculture sector to grow and thrive.~

Key area 2: Working collaboratively on initiatives to address supply constraints

- A** Gathering and sharing expertise to enable the catching sector to better utilise gear selectivity in wild capture fisheries to address bycatch and ecosystem habitat issues. Initiatives include:

 - i. Maintaining and enhancing the online Seafish Gear Database as a widely used source of expert information;
 - ii. Using our expertise to support the design and development of selective gear specifications and tools, including initiatives to address potential impacts on benthic habitats; and
 - iii. Using established networks to provide advice, and disseminate latest industry developments and information (e.g. Discards Action Group).~

- B** Assess the opportunities and threats to UK imports of seafood over the medium to long-term including assessing the likely sources of competition for this supply.~

- C** Assist the sector to source and secure a continuous and compliant supply of material from outside of the UK by

 - i. Informing industry of circumstances in supply countries that could impact on material availability such as food safety alerts or IUU warnings affecting import into the UK. This will also include Seafish exploring how we can access relevant import information post EU Exit.
 - ii. Bringing together policy makers and industry to discuss current industry issues and regulatory proposals.~

- D** Progress initiatives to improve the knowledge base of key data limited fisheries to enable these species to become a credible part of the supply chain: including

 - i. Supporting Project-UK Fisheries Improvement initiatives to enable prioritised stocks to achieve MSC certification goals.
 - ii. Coordinate measures to improve the information base for North Sea and West of Scotland Monkfish and the Cornish sardine fishery.
 - iii. Collaborating with industry and key science partners to develop a pipeline to progress data limited stocks of potential commercial interest and to ensure the processors and retailers have sufficient information to ensure these species become a credible part of the supply chain.*

- E** Disseminate, test and improve the Best Practice Guidance on how to assess the economic implications of trial selective fishing gear.~

Key area 3: Developing and implementing a range of ‘fit for purpose’ supply chain integrity tools to assist the UK sector to maintain its ‘licence to operate’.

- A** Maintain and enhance the Risk Assessment for Sourcing Seafood (RASS) tool to enable seafood buyers to develop responsible sourcing strategies and make informed sourcing decisions in relation to wild fisheries.~
- B** Continue to provide oversight and governance of the Responsible Fishing Scheme (RFS), and support its implementation in the UK. This will include:
 - i. Completing the development and implementation of Version 2 of the standard, aligned to the Terms of Reference which have been agreed by the Seafish and Global Seafood Assurance (GSA) Boards.
 - ii. Successfully transitioning ownership and management of the scheme to the GSA by May 2020.
 - iii. Maintaining the widespread support for the RFS across the UK seafood supply chain, and ensuring all stakeholders are informed of progress throughout the transition period.*
- C** Continue to support and promote the update of the Responsible Fishing Ports Scheme for large ports (i.e. those with a sale facility).*
- D** Maintain and update our online resource Tools for Ethical Seafood Sourcing (TESS), to signpost stakeholders to the wide range of resources and best practice guidance available on supply chain social responsibility.~
- E** Finalise the development of the Responsible Fishing Ports Scheme standard for small fishing ports (those without a sales facility) and promote its take-up once launched.*

Key area 4: Supporting the seafood sector to respond to issues relating to supply chain integrity to maintain the reputation of the seafood industry

- A** Facilitate the Seafish Issues Groups, in partnership with seafood stakeholders, to support responsible sourcing and supply chain integrity.~
- B** Provide secretariat support to two industry-led initiatives on welfare and human rights in the seafood supply chain; the Fishermen’s Welfare Alliance and the Seafood Ethics Action Alliance. [NEW](#)
- C** Support the UK seafood industry to move from a linear (‘take’, ‘make’, ‘use’ and ‘throw’) to a circular economy, where resources are more sustainably managed, supply chain risks are reduced and market resilience increases across the sector. This activity will focus on how a circular economy can be established in a seafood context. The practical application of the concepts will be achieved through the delivery of two circular economy projects in collaboration with processors and retailers. [NEW](#)

- D** Complete the development of a package of product specification templates for use by seafood businesses as a 'business to business' tool to help ensure food safety, provenance and legal compliance requirements are understood by suppliers and purchasers alike.*
- E** Collaborate with industry, government and other stakeholders to develop a series of resources to inform fish welfare practices. This will include:

 - ◆ Completing a risk framework on animal welfare issues relating to the seafood sector.
 - ◆ Identifying and sharing examples of best practice in different fishing métiers from across the world; and
 - ◆ Completing a review of current practices in the live crustacea trade to inform future policy development.~
- F** Provide practical information and guidance to help the seafood supply chain understand the requirements of meeting different social responsibility obligations, such as modern slavery legislation, and to inform their own risk assessments.*
- G** Provide expertise and analysis to help the wider seafood supply chain to respond to issues relating to environmental sustainability, by producing briefings and guidance material relating to issues and campaigns. Past examples include research on issues relating to 'status of mackerel stock' and 'electrofishing in marine fisheries'.~
- H** Provide regular updates on food safety integrity issues affecting the sector and work collaboratively with agencies to uncover fraudulent activity that might compromise consumer confidence in seafood products. This activity will include producing information guides to assist businesses to manage the risk of deliberate adulteration and fraud in their supply chain e.g. guide to minimising cross contamination of allergens.~
- I** Support the seafood sector to respond to issues associated with marine plastics in the supply chain by (1) ensuring up-to-date and relevant information on the issue is available, (2) signposting the sector to initiatives that support improved management and mitigation of the issue, and (3) working in collaboration with the sector to provide accessible and up-to-date consumer information. Specific initiatives include:

 - ◆ Assessing the implications of microplastic particles on food safety.
 - ◆ Managing the implications of abandoned, lost and discarded fishing gear on the marine environment by (1) working with industry to identify and promote best practice initiatives and (2) ensuring fishing businesses are aware of the implications of the extended producer responsibility and are equipped to comply.
 - ◆ Supporting the seafood sector to (1) find better ways to manage plastic use so as to minimise additional costs or penalties, and (2) explore the feasibility of alternatives to plastic that can be used in production and packaging processes process.*



Challenge 5:

Ensuring access to information
to drive innovation and growth



Challenge 5



Ensuring access to information to drive innovation and growth

Our goal is to ensure UK seafood businesses can draw upon the expert advice, knowledge, insight and data they need to inform decisions to deliver increased business prosperity.

Our programme of work during 2019/20 to support this challenge will include:

Key area 1: Encouraging dialogue on science and innovation across the seafood sector

- A** Facilitate the Seafish Expert Panel to provide expertise to support Seafish project delivery and to assist industry to respond to business issues.~
- B** To support marine policy development (including the design of public funding to support the seafood industry), build the evidence base that demonstrates the wider public goods and services that the seafood industry delivers (e.g. food security, public health, marine protection). This will include producing case studies and canvassing expert opinion.*
- C** Conduct a review of innovative initiatives relating to waste management in the seafood sector, focusing on case studies from other jurisdictions and from other industries, to identify opportunities for UK businesses to reduce waste, improve product recovery and potentially generate new revenue streams.*

Key area 2: Facilitating awareness of emerging issues that may impact on the sector and supporting the sector to respond to these issues, drawing on evidenced based expertise and industry experience

- A** Maintain a watching brief across the UK seafood industry landscape for emerging and ongoing strategic issues (e.g. food security) and lead on the production of a global seafood sector risk map.~
- B** Provide deep dives on strategic issues identified through Challenges 1-4, as required. This includes work on assessing climate change adaptation in wild capture and aquaculture.~
- C** Collect industry financial, economic and social data in order to make available robust data sets to support economic analysis, reports and advice. Examples include processing sector and catching sector financial, social and operational data that can be used in impact assessments, valuations or scenario analyses related to the UKs exit from the EU or other proposed changes in regulations.~
- D** Conduct economic analysis across the seafood supply chain to support decision making both for seafood businesses and for government. Examples include impact assessments of the Landing Obligation requirements and analysis of the UK scallop catching sector.~

- E** Develop and deliver an Economic Enquiry Tool to enable stakeholders to access, on a self-service basis, industry performance information for the fishing fleet and the processing sector. **NEW**
- F** Provide economic advice, answering specific queries, communicating and explaining the meaning and implications of economic evidence and theory to industry, government and other stakeholders, so that evidence can be put in context and advice can be tailored to support specific policy and business challenges. This includes:

 - i. Responding to ad-hoc queries from industry and government.
 - ii. Building international fisheries negotiation capability amongst the UK seafood sector.
 - iii. Ensuring that UK fisheries issues are represented at International Council for the Exploration of the Sea (ICES) Economic and Social Working Groups. These working groups are focused on ensuring that the ICES science advice also takes account of economic and social factors and research.~
- G** Commission research to determine the carbon footprint (wild capture / aquaculture farming to consumer plate) of the UK seafood supply chain. Communicate key findings and produce training and educational materials, including the identification of 'easy wins', to help the UK seafood industry transition to low carbon operations. **NEW**
- H** Deliver innovative mapping products to better inform the fishing industry of spatial restrictions on fishing effort so as to reduce conflict and to improve decision making. Initiatives include work to map Marine Protected Area locations across the UK and their impact on fishing activities (this is year two of a two year funded project).
- I** In collaboration with industry stakeholder explore the potential (availability of funding and suitability of datasets) to develop an interactive fisheries mapping tool that provides a clear and visual picture of the UK seafood industry. **NEW**
- J** Deliver a series of information events for industry including the Seafood Summit and the Scottish Seafood Summit.~

Key area 3: Cultivating and resourcing innovative solutions

- A** Complete the production of a new Total Allowable Catch Atlas to provide accurate and accessible information on catch limits of species relevant to the UK seafood industry.*
- B** Work in partnership with the fishing industry across the UK to facilitate a comprehensive understanding of all the selective gears that have been introduced to help vessels meet the requirements of the Landing Obligation.*







Enabling Services: Internal functions that support the work we do

Seafish Business Services is responsible for the internal support functions which enable Seafish to deliver the activities set out in the Annual Plan. It is comprised of the Finance, Levy, Information Systems and Human Resources teams.



Human Resources (HR):


Strategically aligning the organisations needs with the HR agenda is at the heart of the HR strategy; ensuring that Seafish has the necessary capability to meet the goals within the Annual Plan while also being able to flexibly respond to changing demands. The HR agenda for 2019/20 includes:

-  A collaborative and strategic approach to resourcing, succession planning and recruitment to ensure we continue to attract and retain expert people at Seafish.
-  B Enabling and facilitating opportunities for the personal growth and development of staff, which includes implementing the new Seafish Competency Framework model that aligns with our Challenge areas.
-  C Continued focus on staff well-being to ensure the Seafish team is able to perform at its best.
-  D Embedding our Seafish Guiding Principles across all parts of Seafish so that our stakeholders can engage with an organisation that is open to new ideas, that works hard to make things happen, has the necessary expertise, and works in partnership to deliver results.

Finance:

Our Finance team will continue to deliver effective financial systems, robust internal controls to safeguard Seafish’s assets and timely and cost-efficient processing of transactions. The team is also responsible for ensuring:

-  A That the Seafish Board and Seafish Executive have full awareness of the financial implications of business decisions, to support effective decision making.
-  B Internal processes and external reporting are compliant with statutory and other regulatory financial regulations and reporting requirements.

-  That our five Challenge Groups are equipped to be financially flexible so we can respond to the changing needs of the industry.





Levy:

The Seafish Levy Team is responsible for ensuring the timely and effective collection of the levy. The core duties of the team include identifying and contacting new levy payers, credit control on unfulfilled levy payer obligations, and auditing at least 60% of the levy intake during the financial year. In addition to their core duties, our levy auditors have a key role in sign posting the activities outlined in this Annual Plan to the businesses they engage with.

During 2019/2020 Seafish will roll out a new online levy portal to all levy payers to enable them to file their returns more efficiently. The team will also undertake a strategic review and longer term outlook of the Seafish levy.

Information Systems (IS):

The Seafish IS team is responsible for planning, developing and supporting Seafish’s information systems and technology infrastructure to enable users to deliver the Annual Plan. The team has a key role in:

-  Our Digital Transformation strategy, an exciting new project which aims to outline a digital roadmap for Seafish for the next five years.
-  Providing a technology refresh for Seafish staff. This includes the provision of new laptops, PCs, mobile phones and updated software.
-  Enhancing our security systems across all Seafish hardware, laptops, PCs, mobile phones and servers.
-  Ensuring that Seafish’s databases and procedures are compliant with the General Data Protection Regulation (GDPR).



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