



seafish

Here to give the UK seafood sector
the support it needs to thrive.

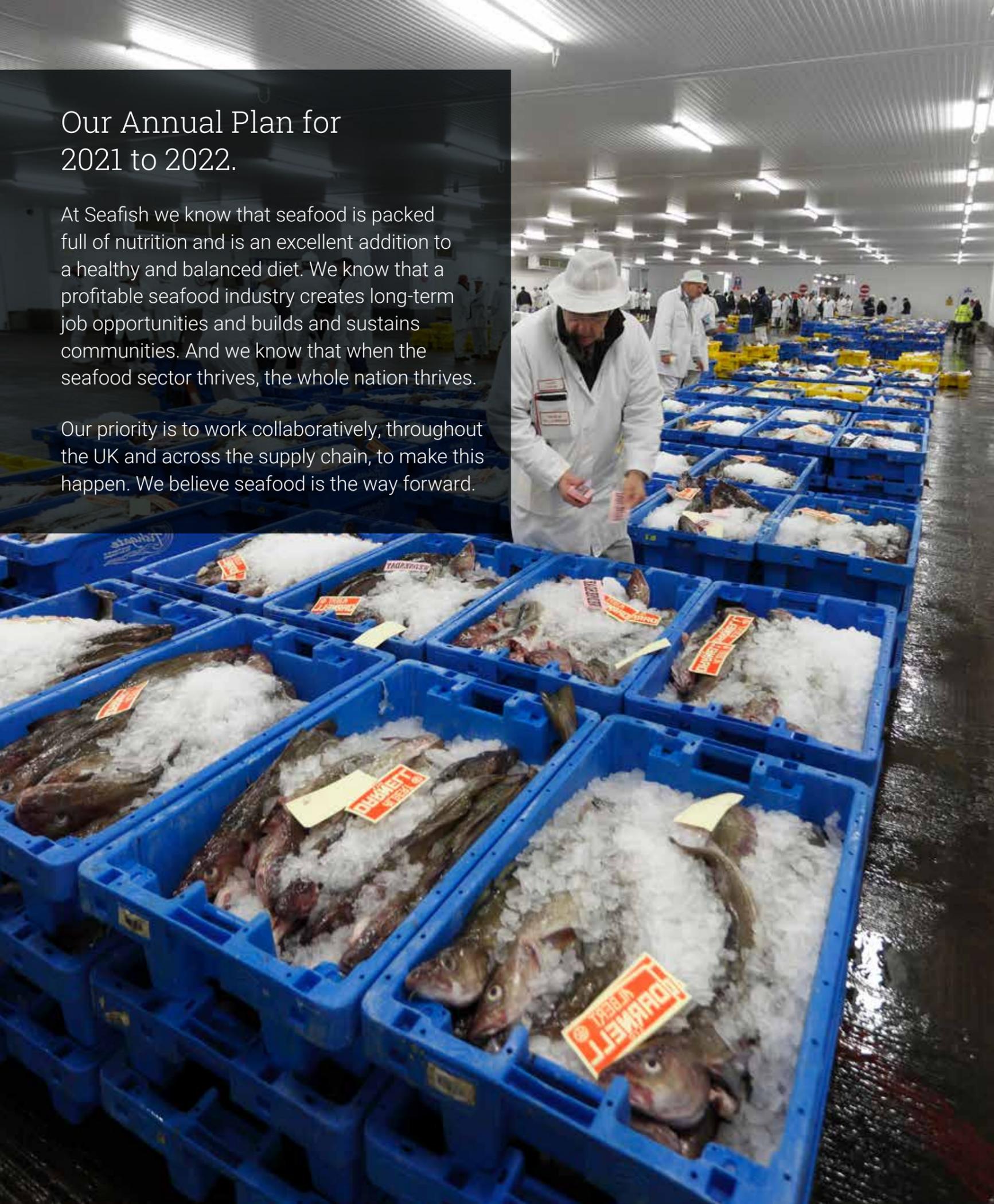
Seafish Annual Plan 2021-2022



Our Annual Plan for 2021 to 2022.

At Seafish we know that seafood is packed full of nutrition and is an excellent addition to a healthy and balanced diet. We know that a profitable seafood industry creates long-term job opportunities and builds and sustains communities. And we know that when the seafood sector thrives, the whole nation thrives.

Our priority is to work collaboratively, throughout the UK and across the supply chain, to make this happen. We believe seafood is the way forward.



The context in developing this plan

The Seafish Annual Plan for 2021-2022 follows a period of immense and unprecedented upheaval for the UK and for the seafood sector. This has shaped our work programme for the coming twelve months. Our overarching focus is 'Respond, Adjust, Recover' as we support the UK seafood industry to navigate the ongoing challenges of the Covid-19 pandemic and the UK's new relationship with the EU.

We know that the opportunities and challenges associated with EU Exit continue to have a significant impact on the seafood sector, as does the Covid-19 pandemic, and uncertainty exists as the economic implications of the past twelve months are fully realised.

Within the UK there are positive signs that the current phase of the pandemic is in retreat. There is a sense of optimism that, on the strength of the vaccine programme, things will return to a degree of normality in the coming months.

However, this is not the case globally, and further shocks and impacts to the global seafood supply chain are still possible, which will in turn affect the seafood sector in the UK.

While the last 12 months have been unquestionably challenging there have been some positives. Large UK retailers experienced a growth of 60% in seafood sales during the first few weeks of the first national lockdown. This was mainly across frozen (fish fingers) and ambient (canned tuna) product ranges, and sales have remained steady.

There has also been a growing commitment from the large retail sector to support UK seafood. This is a trend that high-street fishmongers have long since embraced, and we have seen a rise in new online initiatives that deliver seafood straight to your door.

There is no escaping that the food service sector has had a catastrophic 12 months. However, innovation and ingenuity has shone through here too, as businesses pivoted to 'takeaway services' and online deliveries.

These positive signs of UK consumers falling back in love with seafood provide a solid foundation for the seafood sector, and for us at Seafish, to build on.

What we will do.

This year's Annual Plan continues to align with the five big challenges that could hamper the seafood sector's ability to thrive. We are working to reduce the impact of these challenges on individual businesses, and to help the sector to find solutions and realise opportunities.

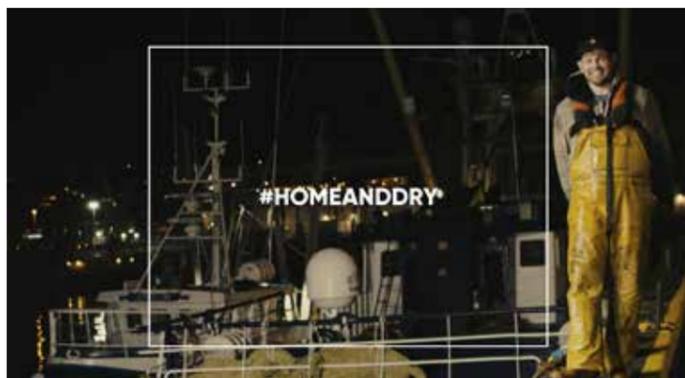
- 1. Changing landscape:** Helping the industry navigate a changing political, economic and regulatory landscape as the UK exits the EU and recovers from the Covid pandemic.
- 2. Increasing seafood consumption:** Increasing consumer demand against strong competition from other protein and non-protein foods.
- 3. A safe and skilled workforce:** Supporting the sector to find a suitably skilled workforce, while addressing complex challenges around workplace safety.
- 4. Ensuring sustainable supply:** Helping the seafood sector to source sustainable seafood in an increasingly competitive global market, while ensuring consumer expectations on human welfare, the environment and animal welfare issues are met.
- 5. Data, insight and innovation:** Helping the sector access data, information and knowledge to ensure it's equipped to understand and respond innovatively to challenges and opportunities.



Given the dynamic external landscape our core priorities for the coming year are:

EU Exit: For the past two years, we've worked extensively to assist seafood businesses to prepare for EU exit. We've engaged with colleagues across government to ensure the complexities of the seafood supply chain are fully understood by policy makers. Now that the transition period has ended and businesses are adjusting to the reality of operating outside of the EU, our work in this area will adjust to support the challenges and opportunities that EU exit brings.

We will focus on assisting businesses to adjust and respond to the changes that the Trade and Cooperation Agreement (TCA) will bring to the seafood supply chain. The TCA is broad in scope, but two key areas of focus are the implications for fishing opportunities and for seafood trade (particularly as the import requirements are implemented later this year). We will also support the seafood industry to look at opportunities beyond the EU as we capitalise on the vital role that international trade plays in the UK seafood supply chain. Key to this will be assisting industry to access new markets and to realise the benefits from the UK's new Free-Trade Agreements.



Covid-19: While the immediate urgency and pressure of the pandemic has eased, its impact continues to be felt as businesses adjust to the ongoing uncertainty. We will continue to support businesses with the advice and guidance they need to recover. We will also assess the medium and long-term impacts the pandemic has had on the seafood supply chain, and the changes that need to be made as a result.

Love Seafood: Building on the successful launch of our Love Seafood brand, we will continue to partner with seafood businesses to positively influence consumer attitudes and perceptions. Our Challenge 4 work also plays a key role as we work to increase understanding and find solutions to the global challenges that influence seafood consumers. Issues include environmental sustainability, supply chain ethics, marine plastics, and fish and shellfish welfare.

Fishing safety: We will continue to work with industry and government to drive improvements to safety at sea through practical initiatives and wider cultural change.

Fisheries Management: The UK's departure from the EU and the Common Fisheries Policy has provided an opportunity to take stock of how we manage our fisheries. Our collective aspiration is for a world class fisheries management system.

One that delivers, in time, sustainably managed fisheries, avoids remedies and mitigates the environmental impacts of fishing. This will ensure that the opportunities from this valuable resource are fully and equitably realised. We will continue to support this ambition through our fisheries management work programme. This year it is focused on delivering the 'Future of Our Inshore Fisheries' project and supporting co-management initiatives across the shellfish sector. We will do this in collaboration with industry, government, and the research community.

The Seafish Annual Plan 2021-2022 reflects a 'point in time' assessment of how we at Seafish will prioritise resources and direct our efforts. Over the last 14 months, we have learnt that things can change quickly and unexpectedly. There is still uncertainty ahead and we know we will need to flex and adjust in response. Delivery timescales may need to be revisited.

Like most businesses, we have faced financial challenges during the past year. We expect these to continue throughout the next 12 months and this is likely to influence our ability to deliver the Seafish Annual Plan 2021-2022 in full. We have identified the activities in the plan that will be delayed until later in the year following a review of our financial position. This plan will be reviewed regularly during the year and revised when necessary.



Strategic Review

Over the next six months, Seafish will undergo a strategic review. Like all public bodies we are required to complete periodic reviews. The last time this happened was in 2011, so it is well overdue.

This review provides an opportunity for us and our stakeholders to think about the functions and services that we provide. Are they still needed? Are other services and support needed more?

The last five years has been a period of significant change for the industry, and the demands on us have also increased in scale and scope. Change is constant so it is vital that Seafish as

an organisation remains fit for purpose and able to help the seafood industry to thrive, now and in the future.

One area where there has been little change though is the levy. This was last reviewed 22 years ago. Given the extensive transformation the industry has undergone in that time, the current levy system is out of date and is likely inequitable.

Delivering this Strategic Review will ensure Seafish has a solid foundation to enable it to continue to support the seafood industry in the future.

How we will work

Since the start of the current Corporate Plan cycle at Seafish, we have committed to be flexible and agile so that we can quickly respond to emerging issues. The need for this has been particularly acute over the last 12 to 18 months. There are still challenges ahead and we will continue to work in partnership with industry and government to assist businesses to 'Respond, Adjust, and Recover'.

Key to this will be:

- A. The 'on the ground' engagement we provide through our national and regional committees and the opportunities the forums give us and government to understand the issues that are impacting seafood businesses across the UK. Our Regional team also play an important role in connecting us to businesses across the country so they can access the advice, guidance and services they need.
- B. Our work to promote the positive reputation and credibility of the industry, which is even more important in the age of misinformation such as the recent Seaspiracy 'documentary'. We will continue to use the full suite of communication channels (print, broadcast and social media) to promote the positive aspects of the seafood industry in the UK and to increase consumer awareness of the benefits of a seafood-rich diet. Alongside this, our Communications team play a vital role promoting and communicating the work we do.

- C. The work we do to convene and facilitate forums to enable industry, government, the research community and non-governmental organisations (NGOs) to share information, ideas and solutions.
- D. Our facilitation of the Seafood 2040 (SF2040) strategy for England's seafood sector. The SF2040 strategic recommendations have recently been revised and our Seafish Annual Plan 2021-2022 will directly contribute to many of these 18 recommendations.



Challenge 1: Changing landscape.

Our Challenge 1 work programme reflects the need to support businesses along the seafood supply chain to recover from the impacts of the Covid-19 pandemic and to adjust and adapt to the UK's changing trading relationship with the EU. We will also work with industry and government to assist the sector to secure potential benefits from new trading opportunities beyond the EU.



The 2021-2022 work programme will include the following activities:

- A. Support the seafood industry to continue to adapt and adjust to the UK's changing trading relationship with the EU. We will also focus on assisting industry in Northern Ireland and across Great Britain to understand and respond to the implications of the Northern Ireland Protocol on seafood trade.
- B. Work in collaboration with industry and government to support the vital role that international trade plays in the UK seafood supply chain, to ensure that the potential opportunities for seafood trade from negotiated free trade agreements are realised, and that any potential implications are understood and addressed.
- C. Develop and implement targeted trade facilitation and seafood promotion activity (such as in-market guides) in international markets to support increased seafood trade. We will provide guidance to help UK seafood exporters to understand export market preferences and opportunities.
- D. Provide advice and guidance to support businesses to continue to respond to and recover from the impacts of the Covid-19 pandemic.
- E. Provide regular assessments of (1) the continued impact of Covid-19 on business viability and (2) the implications of the Trade and Cooperation Agreement on the UK catching and processing sectors.
- F. Work collaboratively with the four administrations to ensure that (1) where appropriate, there is an aligned rulebook across the UK to minimise regulatory divergence and (2) that businesses throughout the UK have access to the regulatory advice and guidance they require.

Challenge 2: Increasing seafood consumption.

Challenge 2 is focused on driving increased rates of seafood consumption (to the recommended two portions per week) by inspiring people to place a higher value on seafood as a core part of their diet. Key to this will be our recently launched Love Seafood brand.



We will work with seafood businesses, to positively influence consumer attitudes and perceptions to encourage consumers to eat more seafood, more often. We will continue to deliver Business2Consumer (B2C) activities under the Love Seafood brand, using paid media and organic activity. We will provide Love Seafood assets to target sectors of consumer-facing seafood businesses through our Business2Business (B2B) activities. Our Love Seafood Group (LSG) will provide oversight and guidance on our marketing activities and how we engage seafood businesses to play their part in amplifying the Love Seafood messages.

The 2021-2022 work programme will include the following activities:

- A. Convene and support the LSG so industry members can help (1) shape the ongoing direction of the Love Seafood initiative and (2) establish a programme of consumer and trade campaigns, events and other activities throughout the year.
- B. Promote Love Seafood direct to consumers to positively influence attitudes and perceptions towards the consumption of seafood. Activities will include consumer campaigns and events across a wide range of channels and platforms.
- C. Promote Love Seafood direct to seafood businesses throughout the supply chain and across the UK, so they can participate in the initiative, use campaign assets and amplify messages. Activities may include trade-focused campaigns and events where possible.
- D. Produce quarterly reports on Love Seafood activity to ensure there is good awareness of brand reach and campaign activity across the seafood supply chain.
- E. Produce market insight reports (and bespoke analyses on request) covering retail sales and foodservice channels, to enable businesses to anticipate and respond to consumer trends and take advantage of the Love Seafood brand activity.
- F. Work together with industry and government partners to provide B2B marketing materials that can promote UK seafood in selected export markets.
- G. Provide seafood-specific regulatory guidance on health and nutrition claims and food advertising, to support Love Seafood activity and to assist industry compliance.

Challenge 3:

A safe and skilled workforce.

Our twin priorities under this challenge are to (1) help eradicate all preventable work-related fatalities and injuries at sea and onshore, and (2) ensure that the seafood sector has access to high quality training and qualifications, to maintain and develop a highly skilled workforce.

In tandem with these two priorities we will help the seafood industry to position itself as an attractive, dynamic and future-focused sector that provides an exciting range of career opportunities throughout the UK and abroad.

Much of Challenge 3 is focused on delivering our ongoing programme of services, primarily focused on safety and training initiatives, and this will continue in 2021-2022. However, as businesses emerge from almost 18 months of Covid-19 restrictions, we are also focused on assisting the sector to re-engage with face-to-face training and we will continue to build on the successes we have made in our provision of online training and assessment.

The 2021-2022 work programme will include the following activities:

- A. Continue to support the promotion of career and employment opportunities in the seafood industry. Building on our pilot 'Sea a Bright Future' careers campaign we will extend its reach and scope nationwide. The campaign is currently focused on the processing sector in the North East of Scotland and there is interest in extending it to the catching sector. Alongside this we will continue to work in partnership with businesses to improve the image of the industry so that potential employees see it as a dynamic, future-focused and attractive sector to work in.
- B. Continue to coordinate the Young Seafood Leaders Network to assist the seafood industry to identify, nurture and retain talent supporting the next generation of young seafood executives to innovate and lead change in the industry.
- C. Deliver a package of Kingfisher Information services to improve industry understanding of marine hazards and to prevent accidents, including:
 - Spatial data and guidance material (for example, FishSAFE & KIS-ORCA) to communicate hazards at sea from the offshore oil and gas, subsea cable and renewable energy sectors.
 - The Kingfisher Bulletin which delivers real time safety alerts of new hazards, conflicting activities and critical offshore news.
 - Guidance material to increase awareness of the wider risks presented by offshore structures and the safety protocols that fishing vessels should follow.



D. Continue to progress the safety agenda across the UK fishing industry:

- Take a lead role in the Fishing Industry Safety Group (FISG) to deliver and promote improvements in fishing safety across the UK catching sector. This includes building on the successful Home and Dry safety campaign.
- Facilitate and support national and regional fishing safety forums, ensuring effective alignment with FISG objectives.

E. Continue to collaborate with the Maritime & Coastguard Agency (MCA), the fishing industry and other stakeholders on preparations for the development and implementation of new UK regulations on fishermen's training and certification.

F. Monitor the provision of seafood training across the UK and take action to address any deficiencies identified in the coverage and activity of our Approved Training Providers and Seafood Training Networks.

G. Provide effective support to instructors and training providers delivering Seafish training programmes by administering available funding, maintaining accurate training records, and delivering expert advice and guidance on training matters.

H. Develop new training materials to support offshore and onshore business needs including:

- Review and update our bivalve shellfish hygiene verification and food authenticity verification courses for food business managers and environmental health officers.
- Develop new training materials on sustainable fishing, fishing gear technology, care of the catch, bivalve purification management, and principles of fish smoking.
- Expand our e-learning content and continue to explore opportunities for online delivery of our training courses.
- Support the development and delivery of apprenticeships and other new entrant training programmes.

I. Complete a review of the seafood industry's labour and skills needs, evaluate the effectiveness of the current support we provide and produce a plan to ensure our future support is targeted for maximum impact. *(Delayed until later in the financial year following a further review of our financial position.)*

Challenge 4: Ensuring sustainable supply.

We will work in partnership with seafood businesses across the supply chain to enable them to meet the responsible sourcing and supply chain integrity requirements demanded by consumers.



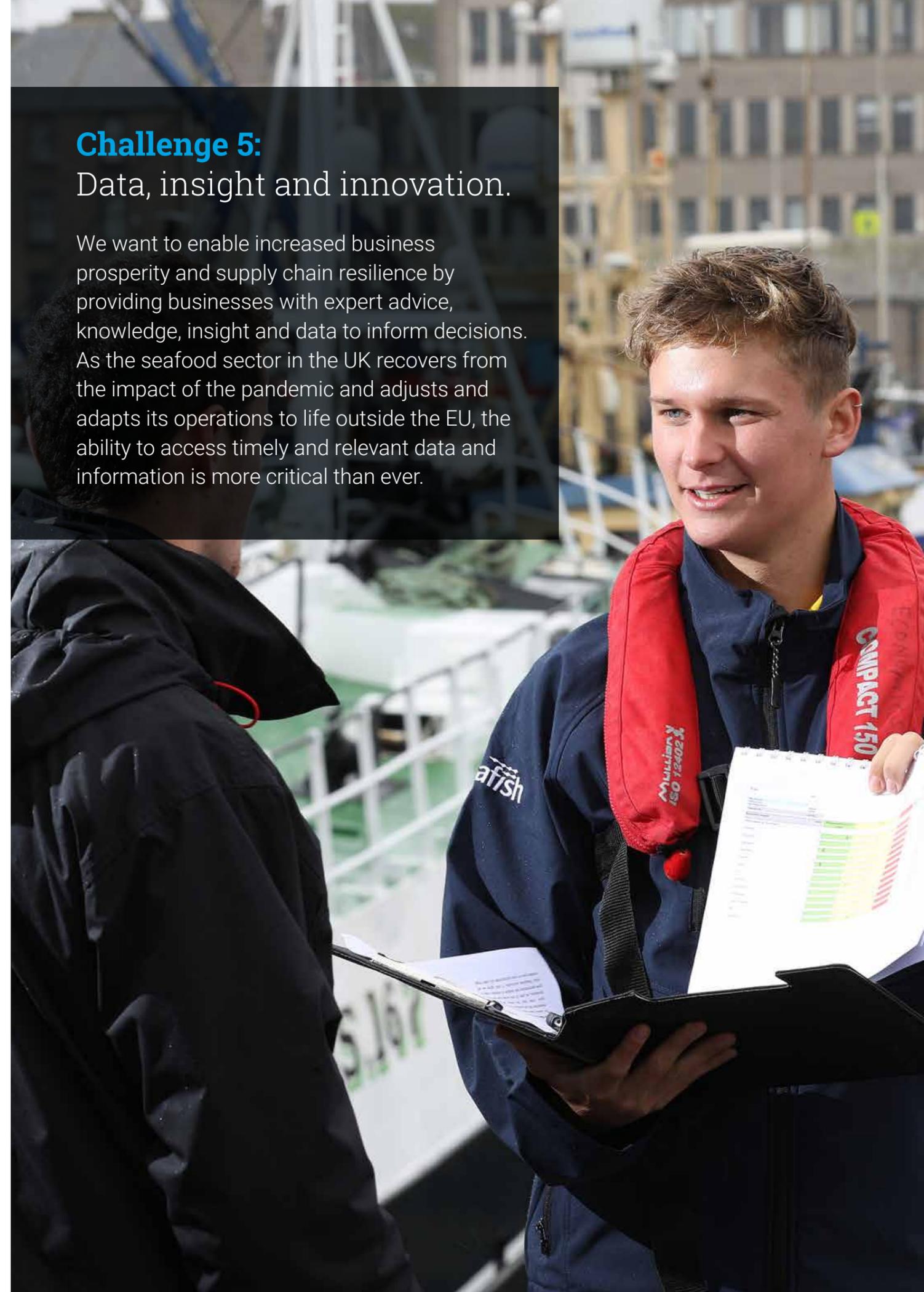
The 2021-2022 work programme will include the following activities:

- A.** Facilitate the Shellfish Stakeholder Working Group as a mechanism to bring industry and government agencies together to work collaboratively on water quality issues affecting the growth of shellfish aquaculture. Priority initiatives include (1) progressing a review of the shellfish classification system and (2) completing research on environmental indicators and their relationship with optimal shellfish harvesting timeframes.
- B.** Provide support to a network of national aquaculture groups, including the Seafood 2040 English Aquaculture Leadership Group, the Aquaculture in Wales Group and the Aquaculture Representative Group in Northern Ireland.
- C.** Work collaboratively with industry, government, and the environmental NGO community on marine protection issues to ensure proposed management measures provide the required environmental protection whilst having the least impact on the seafood sector.
- D.** Gather and share expertise to enable the catching sector to use innovative gear selectivity developments in wild capture fisheries to improve efficiency and help to address the environmental impacts of fishing. Priority initiatives include (1) maintaining and promoting the Seafish Gear Database as a source of expert information and (2) convening an expert gear forum that brings industry, government and the research community together to discuss gear innovation requirements.
- E.** Progress work on the UK's future fisheries management framework working with industry and central government. This will include progressing the 'Future of our Inshore Fisheries' project and supporting the delivery of a range of co-management initiatives including the Shellfish Industry Advisory Group, Crab Management Group, and the Whelk Management Group.
- F.** Progress initiatives to improve the knowledge base of key data limited fisheries. This will include (1) supporting Project-UK Fisheries Improvement initiatives to enable prioritised stocks to achieve MSC certification goals and (2) completing the review of the Ecological Risk Assessment of the effects of fishing in South West England.
- G.** Continue to facilitate the Seafood Issues Groups to support responsible sourcing and supply chain integrity.
- H.** Support two industry-led initiatives on welfare, human rights and social responsibility obligations in the seafood supply chain - the Fishermen's Welfare Alliance and the Seafood Ethics Action Alliance.



Challenge 5: Data, insight and innovation.

We want to enable increased business prosperity and supply chain resilience by providing businesses with expert advice, knowledge, insight and data to inform decisions. As the seafood sector in the UK recovers from the impact of the pandemic and adjusts and adapts its operations to life outside the EU, the ability to access timely and relevant data and information is more critical than ever.



- I. Provide expertise and analysis to help the seafood supply chain respond to issues relating to environmental sustainability, by producing briefings and guidance material to inform industry and consumers. A priority focus will include delivering secretariat and chair services to the North Atlantic Pelagic Advocacy Group.
 - J. Support the seafood sector to respond to issues associated with sustainable plastic use and the presence of microplastics in seafood by producing advice and guidance on the issue. We will also signpost the sector to initiatives that support improved management and issue mitigation.
 - K. Deliver (in collaboration with the US National Fisheries Institute) a Microplastics Expert Symposium.
- This will bring together industry leaders and the global research community to share knowledge and to build a network for future research. *Note delivery of this activity will be subject to Covid-19 travel restrictions being lifted. (Delayed until later in the financial year following a further review of our financial position).*
- L. Work with industry and government to provide advice and guidance on animal welfare issues, including best practice approaches for handling shellfish, and fish welfare risk mitigation.
 - M. Provide advice and guidance to assist the seafood supply chain to adapt to the impacts of climate change and to mitigate their contribution to greenhouse gas emissions (by reducing their carbon footprint).



The 2021-2022 work programme will include the following activities:

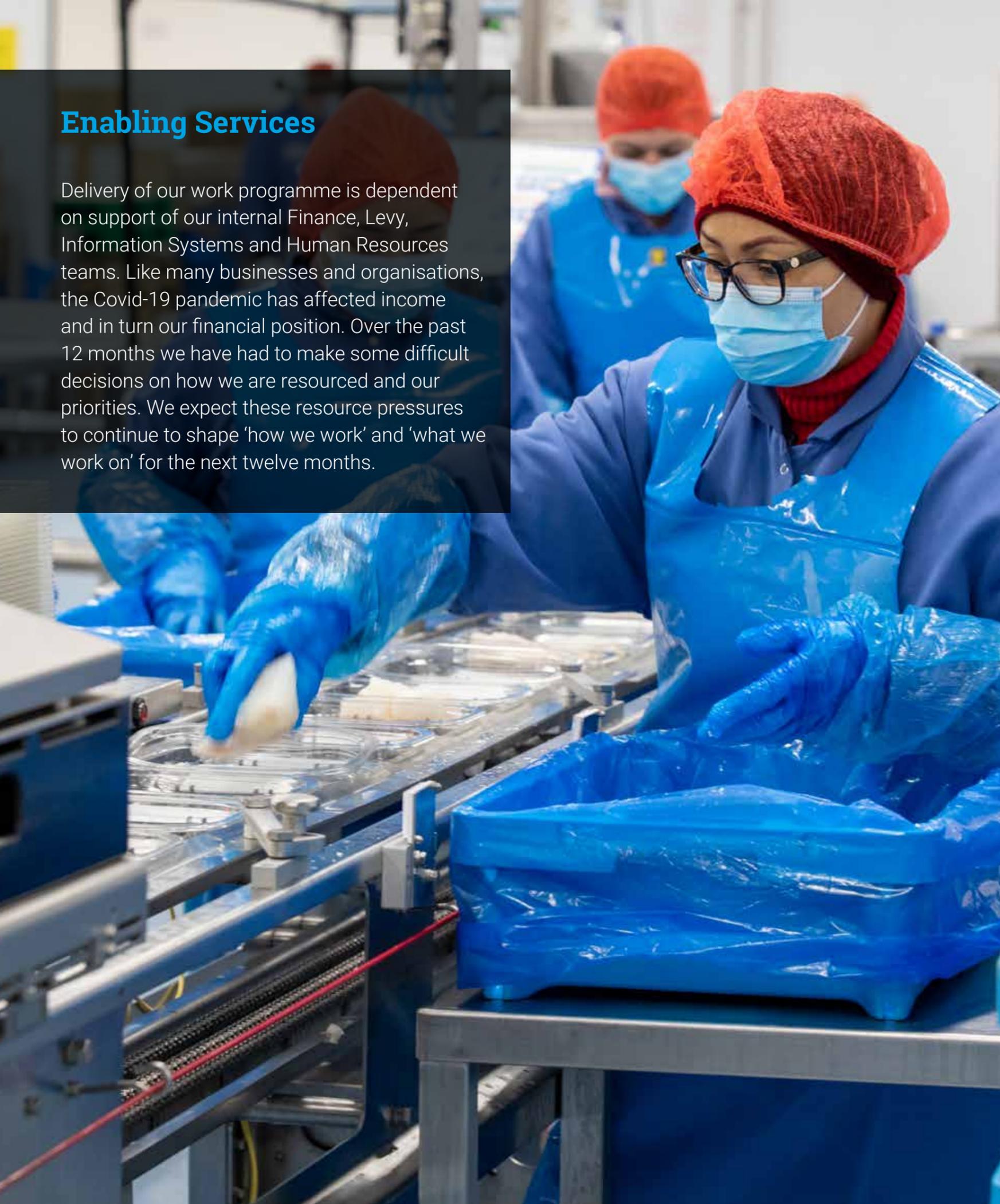
- A.** Facilitate the Seafish Expert Panel (SEP) to provide expertise to support our work and to assist industry to respond to business issues. The SEP will play a key role in connecting the seafood supply chain to the wider research community to ensure industry needs drive research and innovation spend.
- B.** Connect national research and innovation initiatives to the technical challenges of the seafood industry. This will be done through our participation in Fisheries Innovation Scotland, the Seafood Innovation Fund and other funding programmes relevant to the seafood sector.
- C.** Maintain a watching brief across the seafood industry landscape for emerging and ongoing strategic changes. We will map these changes from a corporate, regional, national and international perspective.
- D.** This year's focus is to update the 2016 Fish as Food review to reflect the current and future selling environment and anticipated UK consumer behaviours, which will in turn support our Love Seafood campaign work.
- E.** Collect economic and social data from across the UK catching and processing sectors to produce robust data sets on seafood sector performance and make these available to industry and government.

- F.** Carry out economic analysis and provide advice, to support business decision making and policy development, on matters affecting the seafood supply chain. As part of this activity we will pilot a project to investigate if export data can be assessed by home nation. Currently trade data is only provided by HMRC at a 'whole of UK' level. *(Delayed until later in the financial year following a further review of our financial position.)*
- G.** Continue to build the evidence base to demonstrate the wider public goods and services that the seafood industry delivers. For example, food security, public health, marine protection. This will include work on assessing the contribution that seafood harvested from the UK Exclusive Economic Zone makes as part of the wider UK and global marine resource.
- H.** Complete an economic assessment of the UK aquaculture sector to demonstrate the potential value the industry could deliver under a range of regulatory and production-based scenarios. *(Delayed until later in the financial year following a further review of our financial position.)*
- I.** Carry out research and analysis to enable the seafood industry to explore options and opportunities for improved sector resilience through increased supply chain cooperation and integration. *(Delayed until later in the financial year following a further review of our financial position.)*
- J.** Continue work on mapping fisheries restricted areas (such as within Marine Protected Areas) across the UK to support industry compliance and to enable more reliable assessments of their impact on fishing activities.
- K.** Develop and pilot an approach for identifying and mapping priority fishing areas. This will enable stakeholders to better understand and address issues of spatial conflict amongst different marine users and against the need for increased marine protection. *(Delayed until later in the financial year following a further review of our financial position.)*

Challenge 5 also has a key role in providing much of the data and evidence that underpins the work delivered across the other four challenges. A priority for 2021-2022 will be to improve how we manage, share and use the data we collect.

Enabling Services

Delivery of our work programme is dependent on support of our internal Finance, Levy, Information Systems and Human Resources teams. Like many businesses and organisations, the Covid-19 pandemic has affected income and in turn our financial position. Over the past 12 months we have had to make some difficult decisions on how we are resourced and our priorities. We expect these resource pressures to continue to shape 'how we work' and 'what we work on' for the next twelve months.



The 2021-2022 work programme will include the following activities:

- A. Progress our digital transformation strategy to modernise our IT core infrastructure and processes.
- B. Embark on renewing our Times 100 Best Places to Work assessment as we continue to strive to be one of the best organisations to work for.
- C. Closely manage, monitor and reallocate project budgets in response to further impacts of the Covid-19 pandemic on the seafood supply chain.
- D. Progress work on www.seafish.org to ensure it meets legal accessibility requirements so that we can effectively communicate the work that we do.

Alongside this our enabling services teams will continue to deliver their core responsibilities as outlined below:

Human Resources

Delivering a collaborative and strategic approach to resourcing, succession planning and recruitment. This ensures we can continue to attract and retain the expertise we need while creating opportunities for staff development and personal growth.

Finance

Delivering effective financial control to safeguard Seafish assets, and timely and cost-efficient transaction processing. The team is also responsible for ensuring:

- A. That the Board and Executive have full awareness of the financial implications to support effective decision making.
- B. Internal processes and external reporting are compliant with statutory and other regulatory financial regulations and reporting requirements.
- C. That we are equipped to be financially flexible so we can respond to the changing needs of the industry.

Levy

Ensuring the timely and effective collection of the Seafish levy.



Here to give the UK seafood sector
the support it needs to thrive.

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