

Our Annual Plan for April 2022 to March 2023

At Seafish we know that seafood is packed full of nutrition, is vital for a healthy and balanced diet, provides cost-effective meal solutions, and plays a key role in supporting the UK's food security requirements. We also know that seafood creates long-term job opportunities and builds and sustains communities. 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 2022/23 Annual Plan is the final year of our current five-year corporate plan cycle. It has been a difficult five years for the UK seafood supply chain, and Seafish in turn. The last two years have seen unprecedented supply chain challenges in the wake of Covid and the UK's departure from the EU.

At the time of writing, the UK, like most of the world, is watching events unfold in Ukraine. While the potential impact of these events on

seafood supply can seem irrelevant in the face of the atrocities on the ground in Ukraine, the impact on the UK seafood supply chain is potentially significant.

As with Covid and EU Exit in previous years, we expect that our work during this year will be shaped by the external political landscape and by the need to help the sector to adapt to face the changes that these events will bring.



What we will do

As in previous years our Annual Plan aligns with the five big challenges that could hamper the sector's ability to thrive. At Seafish, 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 to navigate a changing political, economic, and regulatory landscape.
- 2. 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 recruit, develop and retain a suitably skilled workforce and addressing complex challenges around workplace safety.
- 4. Ensuring sustainable supply:** Helping the seafood sector to responsibly source seafood in an increasingly competitive global market and ensuring business and consumer expectations on sustainability including human and animal welfare issues and the wider marine environment are met.
- 5. Data, innovation and insight:** Helping the sector access data, information and knowledge to ensure it is equipped to understand and respond innovatively to current challenges and opportunities.



Discussions with stakeholders during July and August 2021, as part of the Strategic Review engagement process, confirmed the priority areas where businesses across the seafood supply chain need the most support.

Our priority over the next twelve months is to build our capability and capacity in these areas so that what we deliver is valued by stakeholders and has impact.

These priority areas will also inform and shape our 2023 to 2028 Corporate Plan.

There are six priorities:

1) A safe and skilled workforce:

Establishing the industry as a safe and attractive place to work and ensuring that businesses can access the skilled labour they need.

2) Reputation: Enabling the seafood industry to respond to the reputational and societal issues that can act as a barrier to consumers choosing seafood. This work will include.

a) Delivering reactive and proactive communications and media responses on the positive aspects of the seafood sector, and the benefits of a seafood-rich diet.

b) Investing in research, analysis and supply chain initiatives that are designed to protect and enhance the reputation of the industry. For example, offer support to industry on issues such as the impacts of fishing on the marine environment, marine pollution, microplastics, human rights and ethical issues, animal welfare issues and the environmental credentials of seafood.

3) Climate Change: Expanding and enhancing our role in enabling the seafood sector to work collectively to adapt to the impacts of climate change on the seafood supply chain while mitigating the contribution the sector makes to the UK's emissions profile. We will also support the industry to communicate how they are contributing to the blue economy to build consumer confidence in seafood as a low carbon protein.

4) International Trade: Expanding Seafish's international trade work programme to support industry and government to develop and deliver solutions to seafood trade challenges and opportunities.

5) Insight and Innovation: Supplying data, analysis and advice to increase business prosperity and supply chain resilience, and to encourage innovation throughout the seafood supply chain.

6) Fisheries Management: Facilitating collaborative initiatives between industry, government and the research community to support improved fisheries management outcomes that deliver benefits across the seafood supply chain.

The Strategic Review engagement process also identified functions and services that are no longer seen as a priority for us and the industry. Either because we lack sufficient investment to deliver real value, or because responsibility for delivery is better aligned with another organisation.

This outcome has immediate implications for our future involvement in delivering consumer marketing campaigns. Although long perceived to be a priority for industry, our stakeholders have given us a strong steer that:

- Under current budget settings, we do not have the resource to deliver an effective consumer marketing strategy, and
- Consumer marketing is best delivered by private business.

In the absence of sufficient funding, we have been challenged to step away from trying to drive increased consumption through traditional consumer marketing and promotional campaigns. Instead, our stakeholders told us there should be a stronger focus on managing industry reputation and ensuring there is a clear narrative to help overcome the barriers that are preventing consumers from eating seafood.

While we will no longer deliver dedicated consumer marketing campaigns, we will continue to use our marketing expertise to support individual business queries and government and industry initiatives focused on increasing seafood consumption.



Progressing the Seafish Strategic Review

During 2021/22 the Seafish Board, in collaboration with the four administrations concluded its Strategic Review into the future of Seafish. Subject to ministerial approval from across the four administrations, the successful delivery of the review recommendations and preparing for our next five-year Corporate Plan will be a key focus over the next twelve months.

As already highlighted, implementing the findings of the Strategic Review will include building our capability and capacity to enable effective delivery against our priority areas.

The recommendations will also:

- Address outdated governance arrangements;
- Deliver increased partnership opportunities with our four sponsor agencies, and;
- Consolidate our position as the only organisation working across the seafood supply chain and across the UK.

Finally, a significant programme of work will be progressed, in collaboration with Defra, to address Seafish's outdated levy system and to ensure our future financial stability.

This programme of work will ensure that Seafish has a solid foundation to enable us to continue to support the seafood industry in the future.



How we will work

Throughout the current Corporate Plan cycle, we have committed to be flexible and agile so that we can quickly respond to emerging issues. We will continue to work in partnership with industry and government to help businesses to respond and adjust to the opportunities and challenges ahead.

Our Engagement and Communications functions are vital to how we work. They help us to effectively share our research, advice and guidance with the people who matter - our stakeholders across the UK. They also have a key role in ensuring that we understand and are positioned to respond to the issues affecting businesses across the seafood supply chain.

Engagement:

Our Stakeholder Engagement Strategy and associated improvement plans, will enhance how we engage with industry. This will ensure we deliver what is needed and improve our understanding of the impact our support is having.

We will continue to convene and facilitate forums to enable industry, government, the research community and non-governmental organisations (NGOs) to share information, ideas and solutions. We will cover issues as diverse as the management of our shellfish fisheries through to ethical issues affecting the seafood supply chain.

This is complemented by the work we deliver locally, through our team of regional engagement managers. They give support to any seafood business that requires it and ensure our priorities reflect the needs and opportunities facing the industry across the UK. Our network of Advisory Committees, which are made up of representatives from across the seafood supply chain, will also ensure that our priorities are informed by local issues.

Communication:

Our Communications function will be strengthened throughout the year as we continue to look at new and innovative ways to share our work. We will create engaging campaigns and content to promote through our website, email marketing and social media networks as well as through direct stakeholder engagement.

We will also start to build our capability to increase our focus on supporting the reputation of the industry. This should ensure that consumers have access to accurate information about the benefits of seafood and the seafood industry.

Finally, we will continue to focus on helping ensure businesses understand and value our work and making sure that we are able to measure and assess the impacts and benefits we are having.

Challenge 1: Changing landscape

Our Challenge 1 work programme reflects the need to support businesses along the seafood supply chain to adjust and adapt to events in the external operating environment. This includes the ongoing changes from the UK's dynamic trading relationship with the EU, the recent geo-political events in eastern Europe, and domestic policy changes such as a National Food Strategy.



Our Challenge 1 work programme will include the following activities:

- A. Support the seafood industry to continue to adapt and adjust to the UK's changing relationship with the EU, with a particular focus on trade access issues, and the implications of the Trade and Cooperation Agreement on the seafood supply chain.
- B. Work collaboratively with industry and government to support the vital role that international trade plays in the UK seafood supply chain by (1) ensuring the needs of the seafood supply chain are understood as new FTAs (Free Trade Agreements) are negotiated, and (2) helping businesses to understand the mechanics of seafood trade so they are equipped to navigate the complexities of tariff and non-tariff barriers.
- C. Work collaboratively with industry and government to help seafood businesses to understand and take advantage of export market opportunities through the development of targeted promotion activity and trade show support.
- D. Provide regular economic assessments and industry briefings on the political, economic and social issues impacting the seafood supply chain.
- E. 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) businesses throughout the UK have access to the regulatory advice and guidance they need.

Challenge 2: Increasing seafood consumption

Despite the recent decision to stop delivering consumer marketing campaigns, we will continue to support businesses across the seafood supply chain to drive more seafood consumption (to the recommended two portions per week). We will do this by making it easier for consumers to understand the benefits of seafood, and by influencing consumer attitudes on why seafood is a sustainable food choice, so that in turn they place a higher value on seafood as a core part of their diet.

Our Challenge 2 work programme

Will include the following activities:

- A. Deliver generic and bespoke market insight analysis on consumer trends in retail and in foodservice.
- B. Provide regulatory advice and guidance on issues relating to the marketing and promotion of seafood.
- C. Progress research on issues relating to opportunities to influence consumer demand.
- D. Provide ad-hoc marketing advice to support key industry and government initiatives looking to increase consumption.

Challenge 3: A safe and skilled workforce

Our twin priorities under this challenge continue to focus on:

- 1) Helping eradicate all preventable work-related fatalities and injuries at sea and onshore, and;
- 2) Ensuring that the seafood sector has access to high-quality training and qualifications, to maintain and develop a highly skilled workforce.

We will also help the seafood industry to position and present itself as an attractive, dynamic and future-focused sector that provides an exciting range of career opportunities.



Our Challenge 3 work programme will include the following activities:

- A. Support the seafood industry to overcome issues relating to labour, recruitment and retention, and to capitalise on opportunities to promote itself as offering excellent and varied job and career opportunities.
- B. Continue to lead the development and delivery of training and certification for workers in the seafood industry across the UK. We will:
 - i. Develop training solutions for identified seafood skills/training gaps and ensure existing courses/materials stay fit-for-purpose.
 - ii. Continue to support the development and delivery of apprenticeship and other new entrant training programmes.
 - iii. Monitor the provision of seafood training and address any deficiencies identified in delivery/availability.
 - iv. Provide effective support to instructors and training providers delivering seafood training, administer any available funding and keep accurate training records.
 - v. Provide expert advice and guidance to workers and employers on seafood industry training and certification requirements/opportunities.
- C. Facilitate the Seafish Young Seafood Leaders Network to find, nurture and retain talent to support the next generation of young seafood executives to innovate and lead change in the industry.
- D. Continue to progress the fishing industry safety agenda across the UK. We will:
 - i. Take a lead role in the Fishing Industry Safety Group (FISG) to deliver improvements in fishing safety across the UK catching sector.
 - ii. Co-ordinate delivery of the FISG's Home and Dry safety campaign.
 - iii. Facilitate and support national and regional fishing safety forums, ensuring effective alignment with FISG objectives.
 - iv. Continue to administer available funding for safety-related projects including in-water 'manoverboard' awareness events.
- E. Deliver a range of Kingfisher services to help prevent accidents and improve fishing safety by increasing awareness and understanding of marine hazards, including:
 - i. Real-time safety alerts via web, app and email via the Kingfisher Bulletin, allowing users to create and receive personalised warnings.
 - ii. Positional information of offshore manmade structures via FishSAFE & KIS-ORCA, ensuring fishers can display hazardous structures on vessel electronic charting systems.
 - iii. Guidance material to increase awareness of the wider risks presented by offshore structures and the safety protocols that fishing vessels should follow.

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.

Our Challenge 4 work programme will include the following activities:

- A. Support the shellfish aquaculture sector through:
 - i. Our facilitation of the Shellfish Stakeholder Working Group and our research, and policy work on water quality issues affecting the growth of shellfish aquaculture.
 - ii. Advice and guidance on issues and opportunities affecting the aquaculture sector, including support to national and regional aquaculture initiatives.
- B. Work collaboratively with industry, government and environmental NGOs on marine issues to ensure that:
 - i. The ongoing marine protection work of the catching sector is recognised, and that any future decisions to regulate are made with a full understanding of the potential impact on the seafood sector.
 - ii. The economic impact on the seafood industry of proposed spatial restrictions is understood.
 - iii. Awareness of existing restrictions amongst operators is raised through the ongoing delivery and development of our Kingfisher Fishing Restrictions Mapping Service.
- C. Provide advice and guidance to the catching sector and government on gear technology issues, and on the opportunities to use innovative gear selectivity developments to improve efficiency and to help address the associated environmental impacts of fishing.
- D. Facilitate collaborative initiatives between industry, government and the research community to deliver improved fisheries management outcomes, that in turn deliver benefits across the seafood supply chain.
- E. Continue to facilitate the Seafood Issues Groups as a collaborative forum for the seafood supply chain, to engage on issues relating to responsible sourcing and supply chain integrity.
- F. Convene and support industry-led initiatives and knowledge-sharing networks focused on understanding and improving welfare, human rights and social responsibility obligations across the seafood supply chain.
- G. Provide advice and guidance to help 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).

- H. Collaborate with industry and government to provide advice and guidance on animal welfare issues, including developing and implementing best practice guidance for the shellfish supply chain.
- I. Support the seafood sector to respond to issues associated with sustainable plastic use and the presence of microplastics in seafood

- J. Provide expertise, analysis and facilitation support to support industry-led supply chain initiatives focused on improving supply chain integration and resilience and delivering improved sustainability outcomes.



Challenge 5: Data, innovation and insight

Our goal is to ensure UK seafood businesses can draw on the expert advice, knowledge, insight and data they need to inform decisions to deliver increased business prosperity and supply chain resilience. As the UK seafood industry continues to navigate a complex, uncertain and fast-changing external environment, the ability to access timely and relevant data and information is more critical than ever.



Our Challenge 5 work programme will include the following activities:

- A. Facilitate the Seafish Expert Panel (SEP) to provide expertise to support our work and to help 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 and needs of the seafood industry. This will be done through our participation in Fisheries Innovation Scotland, the Seafood Innovation Fund and by building collaborative partnerships with key universities and research institutes.
- C. Maintain a watching brief across the seafood industry landscape for emerging and ongoing strategic changes and conduct special reviews on the changes that are of most relevance to the seafood sector.
- D. Collect data from across the UK catching and processing sectors to produce robust data sets on seafood sector performance that also support economic, social and environmental analysis.
- E. Carry out economic analysis and provide advice, to support business decision making and policy development, on matters affecting the seafood supply chain.
- F. Continue to build the evidence base to demonstrate the wider ecosystem services and public good benefits that the seafood industry delivers.
- G. Actively seek out opportunities to apply and develop our spatial analysis expertise to support decision-making in fisheries/resource management.



Enabling Services

Delivery of our Challenge work programme is dependent on the successful delivery of our internal support functions: Communications, Finance, Levy, Information Systems and Human Resources.

The focus of our Enabling Services during 2022/23 will be to:

- A. Repurpose our communications function to increase its focus on responding to issues affecting the reputation of the seafood sector.
- B. Launch and embed a new approach to stakeholder engagement which will include setting up a framework to measure stakeholder awareness of Seafish and the work we deliver, and stakeholder sentiment towards what we do.
- C. Continue to progress our digital transformation programme.
- D. Establish a Programme Office to support our increasing reporting and change management requirements.
- E. Progress our internal data management strategy to ensure we have effective collection, storage, and management protocols in place to enable us to make best use of our data assets.

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

Human Resources

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

Finance

Delivering effective financial control to safeguard Seafish's assets, and prompt and cost-efficient transaction processing. 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.
- C. That Seafish is 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.

Monitoring delivery and assessing our impact

At Seafish, we have a clear vision to support the UK seafood industry to thrive.

We want to enable it to be:

- Innovative, dynamic and forward looking.
- World leading at producing a healthy 'climate friendly' food with undisputed environmental credentials.
- Equipped to deliver benefits to communities, large and small, across the UK.
- Recognised globally as seafood supply chain experts.

Much of the support we provide to help achieve this vision is centred on convening and facilitating stakeholders to work together. We provide the space to engage, support the discussion, and produce relevant outputs that enable better decision making. We also deliver a programme of services, research, analysis, advice and guidance. Our work can range from an individual business enquiring about food safety regulations through to delivering economic studies on the state of the industry, that are used by government and industry alike. And it covers research on technical matters such as understanding the relationship between ecosystem services and fishing, through to ensuring individual fishermen have the necessary kit to keep them safe at sea.

While this Annual Plan details at a broad level the activities we will deliver over the coming year, the implementation is often responsive in nature as we step in to help industry understand and navigate complex situations. This can make it difficult to assess our impact. Not everything we do can be easily measured but, at a simple level, we know that to have impact we need to first deliver the component parts - the key projects, the timely enquiry to responses, the relevant information updates and the quality services. If we are delivering the right outputs, then we should be making good progress in supporting the seafood industry to thrive.

We also know that we need to get better at asking for and analysing the feedback from industry on how they have used us and how they have valued our support. This is a priority for 2022/23 as part of our wider engagement strategy.

The contributing indicators detailed below only reflect a small part of the support that we provide stakeholders. However, tracking their progress will help us better assess the value and impact that we deliver.



Our Contribution Indicators

Challenge 1:

- Produce four quarterly economic impact assessments.
- Deliver six on-topic/focused industry briefing notes.
- Support industry participation in two seafood trade shows.
- Respond to 15 bespoke trade requests per month.
- Produce eight new (or significant updates) regulatory guidance notes.

Challenge 2:

- Produce 35 new factsheets on seafood trends in retail and foodservice.
- Respond to at least 250 stakeholder enquiries on issues relating to market data.

Challenge 3:

- Deliver 7,000 training places onshore and at sea.
- Deliver 'manoverboard' safety awareness training to at least 250 fishermen.
- Complete 10 audits of Seafish Approved Training Providers.
- Deliver a 30% increase in account holders and a 50% increase in new users creating personal alerts for the Kingfisher Bulletin.
- Deliver three Sea A Bright Future career promotion campaigns focused on the processing and catching sectors.
- Increase membership of the YSLN (Young Seafood Leaders Network) network by 20% and deliver three member events during 2022/23.

Challenge 4:

- Deliver eight online bite-size issues groups and four in-person issues groups – with at least 50 attendees at each meeting.
- Deliver three Fisheries Management Plans and facilitate and support four Shellfish Industry Advisory Group and four Finfish Industry Advisory Group meetings.
- Deliver an updated carbon emissions profiling tool, with evidence of a minimum of 50 businesses using the tool by March 2023.
- Deliver four gear technology workshops and seminars to a combination of fishing industry and non-fishing industry participants.

Challenge 5:

- Seafish, as the lead applicant, successfully tenders for three research proposals under the new Fishing Industry Science Partnerships.
- Seafish partners with universities/research institutes on three successful UK Research and Innovation bids.
- Deliver the fleet and processing sector data collection surveys with a response rate that ensures at least 10% of the population is surveyed.
- Produce four economic research reports on issues relating to the seafood supply chain. For example, fleet performance.

Communications and Engagement:

- Deliver 10 Advisory Committee meetings throughout the year.
- Enhance the reach of quarterly regional e-alerts from a current readership of over 900 stakeholders across the UK to at least 1,000.
- Improve our customer satisfaction score on website content from 44% to over 60% through creating engaging content and improving existing content.
- Maintain website traffic at +40,000 hits per month.
- Increase our average engagement rates on social media from 2% to 2.5% on Twitter and 4% to 5% on LinkedIn.



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

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