

# SEAFOOD 2040

## Final SF2040 Recommendations for 2021 - beyond

#	SF2040 Recommendations
<b>Foundation Recommendations (best practice, science, nutrition, environment)</b>	
1	<p>Maintain the Seafood 2040 programme to continue supporting England's industry toward a sustainable and thriving future by 2040.</p> <ol style="list-style-type: none"> <li>1. Expand SF2040's value of supply chain alignment and government and industry collaboration through facilitation, communication and bringing separate work streams into one vision.</li> <li>2. Continue to progress the delivery plan within the Strategic Framework and ensure relevance.</li> <li>3. Work with the SF2040 SILG and ALG and a range of stakeholders to develop and enhance relationships with government representatives to improve awareness and understanding of England's seafood industry.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Participants: SF2040 - SILG, ALG and Secretariat.</li> </ul>
2	<p>Progress the activities identified by stakeholders as important for the development and improved understanding of the England seafood industry's science, innovation and technological needs.</p> <ol style="list-style-type: none"> <li>1. Identify and map research and innovation needs across England's seafood supply chain.</li> <li>2. Engage with academia and funding bodies to communicate industry research and innovation needs, highlight topics of industry importance, engage relevant funding bodies and target key academic institutions to help deliver.</li> <li>3. Secure funding to support business growth within England's seafood supply chain, especially through the adoption of innovation and new technology.</li> <li>4. Improve awareness of public sector funding opportunities within the seafood industry; encourage industrial organisations to form collaborative partnerships with academia and funding bodies.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Will require funding to achieve the activities.</li> <li>• Participants: SF2040 SILG and Secretariat, and the Seafish Expert Panel.</li> </ul>
3	<p>Consult industry and other relevant parties to map best practice across the English seafood supply chain for catching, aquaculture and processing activities and identify gaps and assess importance. In particular, highlight industry practice that supports the sustainability agenda and resilience in continuity of supply. The purpose of the exercise is to provide evidence that encourages England's supply chain to commit to and employ best practice.</p> <ol style="list-style-type: none"> <li>1. The assessment of best practice should include the following: operational efficiency of all production processes, food safety, training, safety, environmental sustainability, and traceability; include reference to current industry standards and other relevant benchmarks; and be advisory in nature rather than mandatory.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Will require funding to commission mapping exercise.</li> <li>• Outputs to include a series of benchmarking and guidance reports providing information on the industry's activities (and future activities via horizon-scanning) including suggestions / recommendations for change over time where that may be beneficial.</li> <li>• Approach should take into account examples of best practice from around the world, identify what may be appropriate for the English industry and seek to apply that knowledge.</li> <li>• Participants: Fisheries, Aquaculture, and Processing sectors; Wholesalers and retailers; Standard bodies; Seafish; Defra</li> <li>• Linked to Recommendation 15.</li> </ul>

# SEAFOOD

---

## 2040

4	<p>Review and compare the nutritional benefits of English wild catch and aquaculture to other protein-rich foods (e.g. beef, pork, lamb, poultry) and include processed foods containing new protein ingredients such as plant-based and cell-culture proteins. A fact-based narrative of seafood’s nutritional benefits is important to understand and track in order to communicate its role in a healthy lifestyle.</p> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Funding required to commission and achieve the review.</li> <li>• The resulting output should include where seafood sits in an overall healthy diet supported by science.</li> <li>• Linked to Recommendations 6 and 7.</li> <li>• Participants: SF2040 SILG and the SF2040 Secretariat</li> </ul>
5	<p>Provide an overview of the environmental performance of English seafood production for national fisheries, aquaculture and processing sectors. This work will support progress towards carbon neutrality in the English seafood industry and UK Government’s drive to bring all greenhouse gas emissions to net zero by 2050 Using the LCA-type (Life Cycle Assessment) approach that addresses broad areas of environmental impacts, this will cover fish stocks in English waters, aquaculture systems in England, processing, and distribution. The LCA approach will take a standard approach that looks at:</p> <ul style="list-style-type: none"> <li>• Raw Material supply</li> <li>• Manufacturing &amp; Processing</li> <li>• Transportation</li> <li>• Usage &amp; Retail</li> <li>• Waste Disposal</li> </ul> <p>Further information:</p> <ul style="list-style-type: none"> <li>• The analysis should look at factors that affect GHG emissions and other impacts including energy consumption, water use, chemicals use, etc., through product life cycles taking the recognised “cradle-to-grave” approach.</li> <li>• Outputs to be a series of reports of the analyses undertaken. This information will be used to provide detail of how domestic seafood product compares to the performance of other products in the marketplace, communicated in support of achieving both increased consumption of domestic product, as well as progress towards the two portions of seafood consumption per week target. Opportunities for improvements should be identified, and where appropriate plans made to address these specific areas.</li> <li>• Funding is required and could come from multiple potential sources, including: FaSS, Research Councils and Defra.</li> <li>• Possible partners include: universities, Seafish, Cefas, CIEL, processors, and retailers.</li> </ul>
6	<p>Estimate the socio-economic impacts (e.g. government budgets and population health) of a shift to consumption rate of two portions of seafood a week in England. Impacts to include changes in the leading causes of death in England, e.g. cardiovascular health, dementia, etc.</p> <ol style="list-style-type: none"> <li>1. Validate and build on the research already delivered against Recommendation 6 in 2020 for cancer and Type-2 diabetes.</li> <li>2. Investigate effects of increased seafood consumption, by demographic group, in relation to a range of wellness indicators.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Linked to Recommendations 4 and 7.</li> <li>• Funding required to commission and achieve the research.</li> <li>• Participants: SF2040 SILG and the SF2040 Secretariat.</li> </ul>

# SEAFOOD

## 2040

### Marketing Recommendations

7	<p>Continue to build on the shared understanding of the barriers and opportunities around seafood consumption growth as developed by Seafish and communicate the findings with partners. Support Love Seafood by Seafish with English national, regional and / or local-level initiatives, projects and campaigns that promote the seafood industry including any government or industry export strategies.</p> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Linked to Recommendations 4 and 6.</li> <li>• Participants: SF2040 SILG and the SF2040 Secretariat, Seafish.</li> <li>• Possible partners: Local Enterprise Partnerships, Local Councils, Producer Organisations, etc.</li> </ul>
8	<p>Explore options that will support a domestic market demand for a wider variety of English-caught species and farmed fish and shellfish.</p> <ol style="list-style-type: none"> <li>1. Investigate potential domestic market opportunities for underutilised and undervalued species in the UK market.</li> <li>2. Develop a common approach to marketing less well-known species where consumer acceptance could be achieved, working with retail, foodservice and public sectors.</li> <li>3. Explore whether mutual benefit between the tourism and heritage sectors and the primary fishing and seafood sectors can be achieved.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Linked to Recommendations 7 and 15.</li> <li>• Funding required to commission and achieve the research.</li> <li>• Outputs include detailed reports providing an overview of the issues, including recommendations for where domestic market opportunities may be strengthened.</li> <li>• Participants: SF2040 SILG and the SF2040 Secretariat, Seafish.</li> </ul>

### Catching and Aquaculture Recommendations

9	<p>Help to maximise the potential benefits of the economic link license condition* for coastal communities and the wider seafood sector by working collaboratively with Defra, MMO and wider industry to:</p> <ol style="list-style-type: none"> <li>1. Consider what more can be done to utilise resources better and reflect on the effectiveness of the changes being introduced from 2022; and</li> <li>2. Identify what opportunities there may be to extend the existing framework and support investment in measures to enhance the sector such as skills and training, scientific research, and new entrants.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• *The economic link license condition requires vessels fishing against the UK allocation of quota to demonstrate a real economic link, or benefit, to the UK by for example, landing their catch into UK ports. Defra held a public consultation in 2020 seeking views on a new proposal to strengthen the economic link condition in England.</li> <li>• This recommendation is primarily led by Defra. The SF2040 programme will support government in their efforts.</li> <li>• Participants: Defra, POs</li> </ul>
---	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

# SEAFOOD

---

## 2040

10	<p>Support England’s seafood industry and government implementation of the Fisheries Act 2020.</p> <ol style="list-style-type: none"> <li>1. Facilitate and support the aims of the Fisheries Act in relation to fisheries and aquaculture management. Collaborate with government and industry and help to maintain a platform for ongoing engagement including the identification of funding sources and the commission of projects.</li> <li>2. Encourage co-management between the catching sector, aquaculture sector, regulators, government, and the supply chain.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• The SF2040 programme can organise and facilitate workshops across government and industry as well as compile and communicate information and findings.</li> <li>• Participants: Defra, Seafish, industry and SF2040 SILG and Secretariat.</li> </ul>
11	<p>Work with Producer Organisations (POs) to build on their strengths, and improving where necessary and exploring potential for new responsibilities</p> <ol style="list-style-type: none"> <li>1. Where appropriate, consult POs on negotiations and agreements impacting fishing opportunities</li> <li>2. Ensure fit for purpose regulation and effective enforcement underpins a level playing field and high standards</li> <li>3. Consider the potential of extending the role of POs beyond what is set out in the CMO Regulation. Broaden the conversation across the supply chain as all have an interest in POs. Work to determine with partners and supply chain what a potential extended role could look like e.g. increasing accountability, transparency, marketing, and making public how they manage their quota.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• This recommendation is Defra led and the SF2040 programme offers support.</li> <li>• Linked to Recommendations 8, 9, 10, 13, 15 and 16.</li> <li>• Participants: Defra and the Association of Fish Producer’s Organisations.</li> </ul>
12	<p>Enhance the now established SF2040 Aquaculture Leadership Group (ALG) in its efforts to more widely represent English aquaculture, to encourage innovation and technology, and to support export and domestic growth. Provide strategic vision and support to enable the expansion of aquaculture. Aim to strengthen relationships between academia, industry, government, and regulators, and encourage collaboration.</p> <ol style="list-style-type: none"> <li>1. Support and encourage English Aquaculture Strategy (EAS) progress. In particular: <ol style="list-style-type: none"> <li>a. Commission project work where appropriate and deemed important within the delivery plan (ALG and SF2040 Secretariat).</li> <li>b. Support the Government review of current regulation impacting on shellfish aquaculture and further reviews e.g. freshwater (Defra Working Group, ALG and SF2040 Secretariat).</li> <li>c. Determine a project with a regional approach that identifies potential areas of aquaculture across the English coast, including co-location opportunities. Build on any relevant mapping work e.g. the Marine Plans and the CEFAS / Dorset and East Devon FLAG project. Secure funding and commission the work (ALG, Seafish, Defra, MMO, Regulators).</li> </ol> </li> <li>2. Maintain an awareness of the challenges and opportunities within aquaculture and raise anything that may impact positively and negatively on the English industry over the timescale of the SF2040 programme. Facilitate discussion on opportunities and risks at events, Parliamentary meetings, workshops, etc. (SF2040 Secretariat and ALG).</li> </ol>

# SEAFOOD

---

## 2040

	<p>3. Feed into and support discussions and projects that ensure the shellfish testing regime is fit for purpose to reduce duplication across different agencies, reduce costs and grow public confidence in shellfish aquaculture (ALG, Seafish, Defra, Shellfish Stakeholder Working Group and industry).</p> <p>Further information:</p> <ul style="list-style-type: none"> <li>• The SF2040 Secretariat and ALG will work toward the achievement of the English Aquaculture Strategy delivery plan as well as this recommendation.</li> <li>• Linked to Recommendations 8, 10, 13, 15 and 16.</li> <li>• Participants are listed in the recommendation.</li> </ul>
<p><b>Enabling Business Growth Recommendations</b> (infrastructure, training, supply chain resilience, maximizing seafood resource)</p>	
13	<p>Facilitate the growth of the English seafood industry through the mapping of existing supply chain facilities and infrastructure against current and future needs including domestic aquaculture production. Consult the industry to develop a stock-take of where facility / infrastructure restrictions to efficient business exist. Analyse what further investment is required in 10 - 20 years (e.g. more temperature-controlled facilities) and include links to relevant development bodies such as LEPs to utilize the support they can provide in regional economic growth. Review seafood facility / infrastructure good practice in similar countries.</p> <ol style="list-style-type: none"> <li>1. Within this assessment identify the specific barriers to maintaining and improving key infrastructure and facilities within English ports. Include the following in the English port assessment: depuration facilities, deep water berths, ice production, vessel new build and maintenance, physical and virtual auctions, digital connectivity, distribution and storage and which ports to invest in so a bigger class of boats can land in England.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Secure funding and commission work.</li> <li>• Linked to Recommendations 15 and 19.</li> <li>• Participants: Defra, SF2040 SILG, ALG &amp; Secretariat, British Ports Association, Local Councils, private port owners, the National Federation of Fisherman’s Organisations, Producer’s Organisations, Shellfish Association of GB, aquaculture industry, British Trout Association, etc.</li> </ul>
14	<p>Deliver a single cross-sector seafood training and skills plan based on identified needs and requirements including aquaculture. Ensure Post-16 skills plans are included and that they have work-based learning opportunities and meet the needs of the seafood supply chain.</p> <p>Further information:</p> <ul style="list-style-type: none"> <li>• The SF2040 programme will support Seafish’s efforts to achieve the recommendation.</li> <li>• Participants: Seafish, industry.</li> </ul>

# SEAFOOD

---

## 2040

15	<p>Improve resilience across England's seafood supply chain to enhance flexibility and endurance during market demand and supply disruption and reduce impact on market access and price.</p> <ol style="list-style-type: none"><li>1. Evaluate the current ability of the supply chain to meet business requirements and identify the domestic, import, and export trade barriers to determine where the risks exist. Highlight the major gaps and the local, national and global (if relevant) opportunities. Within this evaluation:<ol style="list-style-type: none"><li>a. Disaggregate the supply chain into sectors and include exports and imports. Different sectors will have different scenarios and solutions.</li><li>b. Include recommendations and possible interventions that will help to secure seafood product supply. Ensure they include digital solutions and opportunities within coastal communities and also reflect the diversity of the supply chain.</li></ol></li><li>2. Where possible, support the work of other organisations in the improvement of knowledge exchange throughout the supply chain about the demands of the market (for example, Corporate Social Responsibility (CSR), the expectations of consumers, nutritional benefits of seafood, and increasing supply chain surplus (profit) to make seafood value chains more efficient and end product more affordable).</li><li>3. Promote and engage pre-competitive research into product development to support improved economic value of England's seafood product.</li></ol> <p>Further information:</p> <ul style="list-style-type: none"><li>• Requires funding to commission the evaluation.</li><li>• Linked to Recommendations 8, 16 and 19.</li><li>• Participants: Industry, Government.</li></ul>
16	<p>Maximise the value of the seafood resource that is going to uses other than human consumption alongside reducing food waste. Investigate opportunities to both reduce fish waste and create additional value in other non-food related sectors for that waste. Identify prospects for creating high-value by-products from residual resources for other industries (e.g. pharmaceutical, cosmetics, etc.) and determine the potential 'size of the prize'.</p> <ol style="list-style-type: none"><li>1. Signpost the industry to existing information and tools to help address opportunities to reduce waste and maximise yield and value in production.</li><li>2. Maximise the value of fish meal, fish oil and by-products from seafood and freshwater fisheries, for fishmeal, health and other markets such as nutraceuticals.</li><li>3. Exploit potential markets for verifiably sustainable under-utilised species.</li><li>4. Quantify socio-economic importance of fishmeal sector in protein to better inform policy and decision making within the seafood value chain.</li></ol> <p>Further information:</p> <ul style="list-style-type: none"><li>• Requires funding to achieve the actions.</li><li>• Linked to Recommendations 8, 15 and 19.</li><li>• Possible participants: Seafish Expert Panel.</li></ul>

# SEAFOOD

---

## 2040

Trade Recommendations (export and import)	
17	<p>Ensure English seafood is fully factored in the Government's export growth and promotion activities including Free Trade Agreements.</p> <ol style="list-style-type: none"> <li>1. Establish an England Seafood Exporter's Group comprised of industry and government. This group will discuss export business process in a pre-competitive environment, liaise with government regarding export activities and agreements, and support regional industry seafood export strategies and food initiatives.</li> <li>2. Examine the seafood export industry post EU-Exit through an analysis of gaps and areas for improvement that will build English export resilience and generate further global opportunities. In this examination, develop an understanding of what the end market is using English seafood exports for and how can these be positioned as a premium for provenance and quality. To include the examination of the potential for free ports to support business aims.</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• The SF2040 Secretariat can facilitate meetings with Defra, Seafish and DIT involved in the planning.</li> <li>• Linked to Recommendations 15 and 19.</li> <li>• Participants: Defra, Seafish, DIT.</li> </ul>
18	<p>Support and encourage the UK Government in the ongoing facilitation of favourable international free trade and preferential tariff agreements.</p> <ol style="list-style-type: none"> <li>1. Assess the current and future tariff environment and future for the processing sector from both export and import perspectives.</li> <li>2. Discuss measures of success with Government. For example, how will an FTA be determined beneficial to the English seafood industry? What would be the opportunities and gains for English importers and exporters?</li> </ol> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Defra communication regarding FTAs and tariffs is ongoing through specific channels and teams. The SF2040 programme will support their work and facilitate workshops and / or meetings.</li> <li>• The assessment exercise of the current and future tariff environment will require funding to achieve.</li> <li>• Linked to Recommendation 17 and 18.</li> <li>• Participants: Defra, DIT, Seafish and industry.</li> </ul>
19	<p>Examine the seafood import industry post EU-Exit through an analysis of gaps and areas for improvement that will build English import resilience and generate further global opportunities. Include the ongoing reviews of the tariff free quotas adopted from the EU and the implications of Rules of Origin (ROO). Ensure government and industry collaboration to facilitate seamless, transparent import processes into England that meet the seafood requirements of industry and consumers.</p> <p>Further information:</p> <ul style="list-style-type: none"> <li>• Will require funding to achieve the activities.</li> <li>• Linked to Recommendations 13, 17 and 18.</li> <li>• Participants: Defra, Seafish, SF2040 SILG, and industry (e.g. Seafood Industry Alliance).</li> </ul>