

SEAFOOD 2040

A strategic, collaborative
seafood initiative for England



The future is thriving and sustainable

Pictured: Female lobster found during a tagging project, Isles of Scilly.



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The SF2040 Programme is facilitated by Seafish and funded through the Fisheries & Seafood Scheme managed by the Marine Management Organisation.

Minister's Foreword

Seafood is part of our national identity. The United Kingdom is surrounded by an ocean that provides incredible natural resources supporting jobs, products, and food supply. Inland, the freshwater lakes and rivers across England provide further high-quality aquatic products. We should all be proud that thousands of people work within these waters and serve as stewards of the marine and freshwater environment.

Pictured: A trawler returning to harbour, Dorset.



Minister's Foreword

Without a doubt, the English seafood industry is important for economic growth and ensuring we have reliable access to a sufficient quantity of affordable, nutritious food. The Seafood 2040 (SF2040) Strategic Framework builds on this understanding and is an excellent foundation for the future security of a sustainable industry. Emerging from the impacts of COVID-19 and fully realising the opportunities resulting from our newfound status as an independent coastal State will take time. It will require resilience and adaptation. The SF2040 framework is one initiative that supports the English seafood industry as it recovers from a global pandemic and moves closer to a thriving and sustainable future. It is a collaborative initiative between government and industry, imbued with a shared vision of increased seafood consumption within England, domestic and export market growth, and building back stronger with knowledge and innovation.

In the first two and a half years, SF2040 has published an English Aquaculture Strategy, a bold and aspirational approach and delivery plan for the sustainable development of English aquaculture. The Programme delivered research on the training and recruitment challenges faced by the English seafood industry with Recommendations for improvement.

The Seafood Industry Leadership Group (SILG) ably guides the Programme and consists of members from across the entire seafood supply chain plus government. I welcome that this representation ensures a holistic view from catch and farm to plate.

The Seafood 2040 Programme is the first step in a longer journey. With their revised framework consisting of meaningful and direct action that supports the flexibility that will be required, I am confident of the English seafood industry's ongoing success.

I would like to thank the SF2040 SILG, the SF2040 Aquaculture Leadership Group, and the Sea Fish Industry Authority (Seafish) for their efforts and support. This strategic framework and its supply chain approach is an important vehicle for government and industry as they collaborate to ensure a thriving and sustainable English seafood industry.

Victoria Prentis

Victoria Prentis
Minister for Farming,
Fisheries and Food



Chair's Introduction

This is the first time that the Seafood Industry Leadership Group (SILG) has taken the Recommendations for the Seafood 2040 Programme through a refresh exercise. The original Recommendations were developed through a comprehensive consultation exercise led by the previous Chair Alison Austin OBE, and published in 2017. Since then, it is clear that there are a number of significant changes to the seafood industry both at home and abroad, not least the impacts from both Brexit and the COVID-19 pandemic.

Pictured: Boats tied up at Mevagissey, Cornwall.



Chair's Introduction

In addition, the Programme has already delivered against some of the original Recommendations, necessitating some reflection on where to target resource in order to gain best impact for the sector.

We have been incredibly fortunate to have the enormous experience, expertise and foresight of the SILG to draw on in this exercise, and our thanks go to every member for their comments, input and suggestions in developing this revised delivery plan.

The SILG brings together knowledgeable government and industry representatives from across the entire English seafood supply chain. SILG members are from the fisheries, aquaculture, processing, retail and foodservice sectors, so the refresh presents a holistic view of the current priority issues in English seafood. That those priorities reflect the thoughts of both government and business is a great strength of the SF2040 Programme.

We also extend our thanks to Seafish for the ongoing support to this important work, and the many individuals within that organisation who have consistently provided high quality advice across a range of relevant topics.

There is much to do to secure long-term productivity across the seafood sector in England, and the text of the Recommendations will be developed into actions in order to enable delivery against the priorities via a series of projects and links to other work. Many partner organisations and initiatives are working in the same space, particularly Seafish and Defra, and we look forward to working with many experts across the various organisations to the benefit of business, the consumer and the environment.

The SF2040 Programme is founded on the principles of best practice, collaboration, communication, and science, innovation and technology. We all look forward to building on these foundations to secure the thriving and sustainable industry that is the aim of the Programme.



Dr Neil Auchterlonie
Chair, Seafood 2040



The Seafood 2040 Strategic Framework

The Seafood 2040¹ (SF2040) Strategic Framework is an England-only, ambitious and shared Programme with clear opportunities across the seafood supply chain. It is a collaboration between government and industry.

Stakeholders from across the English seafood supply chain, government and regulators work together through the now established Programme in pursuit of a single, compelling vision: **a thriving and sustainable English seafood industry by 2040.**

¹ SF2040 Strategic Framework: www.seafish.org/article/seafood-2040

Pictured: Hauling pots, Northumberland.

The Seafood 2040 Strategic Framework

The origins date back to a request from the former Fisheries Minister, George Eustice, MP, in 2016 to contribute to a Defra food and farming strategy. This was subsequently fleshed out further by Alison Austin OBE and key industry and government stakeholders into the SF2040 Strategic Framework for England. The original document sets out a vision for a thriving seafood industry, the potential size of the prize, and 25 Recommendations for implementation.

SF2040 is not an organisation, but an umbrella strategy. Its value is twofold – firstly raising awareness of seafood and keeping it in the forefront of policy makers minds, and secondly as a way of consolidating the diverse activity being driven by a wide variety of actors from private companies to industry organisations and from Defra and other government departments to other public bodies.

The SF2040 Programme acts as a thread that binds together this activity and positively frames the seafood value chain within the wider food and drink sector as well as contributing to government strategies on the economy and environment. Seafish facilitates the implementation of the framework in partnership with Defra and the English seafood industry through Marine Management Organisation grant schemes. We are thankful for the ongoing support to this crucial work.

The SF2040 Refresh

In 2020, several of the original Recommendations had been achieved, such as Recommendation 1, the establishment of the Seafood Industry Leadership Group (SILG) and Recommendation 4, the development and dissemination of seafood nutritional profiles. Also, we recognised that the external landscape had significantly changed since the framework was first published in 2017.

Notwithstanding the global pandemic and the transition from an EU member to an independent coastal State, a review was necessary to ensure ongoing relevance to both industry and government and to consider new opportunities to take forward. Therefore, we reassessed the Objectives and Recommendations for 2021 in an effort to better support the English seafood industry as it emerges from COVID and the EU-Exit transition. Seafish, Defra, the SILG, the SF2040 Aquaculture Leadership Group (ALG), and industry experts were consulted. The year-long exercise culminated in a refreshed framework of 19 Recommendations that continue to support the entire English supply chain with meaningful actions. **This document is the result – the refreshed SF2040 Strategic Framework.**

The Ambition



Our ambition is to see a seafood industry that is sustainable and thriving – where a whole supply chain approach has fostered collaborative working practices, whilst celebrating the diversity of our different sectors and regions. And one where seafood is highly valued, driving consumption figures at home and export sales abroad; and where science and a supportive regulatory framework enable innovation and best practice from catch and farm to plate.

Pictured: Processing mackerel.

The Vision and Priorities

The Vision: A thriving and sustainable English seafood industry by 2040

Driving the vision are three priorities:



Priority 1

Maximise sustainable wild catch opportunities

Landing fish.



Priority 2

Grow a sustainable aquaculture sector

Farmed trout, courtesy of ChalkStream Trout Ltd.



Priority 3

Enable business growth

Staff from Dorset Cleaner Fish Ltd at work, courtesy of Dorset Coast Forum and Butterfly Effect Films.

The Objectives and Foundations

By achieving the following Objectives, the SF2040 vision of a sustainable and thriving English seafood industry can be realised.

Objective 1 (Primary)

Seafood consumption increases towards recommended levels with recognition of seafood's nutritional benefits



Objective 2

Wild catch fisheries are verifiably sustainable and productive, supporting coastal community resilience.



Objective 3

Significant growth has occurred in freshwater and marine aquaculture in production volume, jobs and numbers of farms.



Objective 4

Business growth is enabled by infrastructure improvements across the supply chain.



Objective 5

Opportunities for exports and imports have increased as a result of improvements in international market access.

The Objectives and Foundations

Objective 1 (Primary)

The most recent data available from the Defra Family Food datasets states that England's seafood consumption was 161 grams per person per week in 2019². NHS England recommends 280 grams per person, per week³, or two portions per person, per week.

Thus, there is further work to encourage families and households to eat more seafood protein and this framework is one such mechanism alongside other long-term initiatives like Love Seafood by Seafish⁴ and the development of an England National Food Strategy.

2 Family food datasets – GOV.UK. The 161 grams is the summation of UK household seafood purchases + UK eating out seafood purchases. The current data includes up to 2019. The 2020 data are available October 2021: www.gov.uk/government/statistical-data-sets/family-food-datasets

3 Fish and shellfish – NHS: www.nhs.uk/live-well/eat-well/fish-and-shellfish-nutrition

4 Love Seafood: www.loveseafood.co.uk

Objectives 2-5 (Secondary)

The SF2040 framework supports fisheries, aquaculture and processing growth. Both import and export markets are recognised as valuable for all sectors. There is room for increased seafood consumption across England including the increase of domestic fish consumption as well as improving the opportunities for export and import seafood expansion.

Policy discussions and planning for global and domestic food security are already occurring. The need for equitable access to healthy, sustainable food, which should include fish and other seafood products, will only increase. England's seafood industry has a role to play.

The Foundations

SF2040 is founded on collaboration. Research, projects, and conversations are already underway via government and industry to support the English seafood industry. It is important to make best use of limited budgets and avoid duplication of effort where possible.

In addition, best practice, and science, innovation and technology, are important foundations both domestically and internationally. Our industry is reliant on imports and exports as well as a knowledge economy which is also exported internationally. There are Recommendations that specifically encourage these elements, and the Seafish Expert Panel Chair has a permanent seat on the SILG.

Over the course of the first three years of the SF2040 Programme, it became apparent that communication of the work already underway and connecting it to the vision of a thriving and sustainable seafood industry is an important part of what we do. Therefore, we added it as one of the Programme's foundations.

- Collaboration
- Best Practice
- Science, Innovation, and Technology
- Communication

Delivering the SF2040 Programme

Pictured: Unloading a catch of mackerel, Newlyn, Cornwall.



The Secretariat

The Programme is led by the SF2040 Secretariat, Dr Neil Auchterlonie, Chair, and Kimberly Cullen, Manager. The Secretariat is the custodian of the SF2040 Programme and the Recommendations, and is responsible for delivery. The Secretariat connects organisations working for mutual benefit in support of the SF2040 Recommendations.

Seafood Industry Leadership Group (SILG)

SILG represents all the English seafood sectors, as well as public bodies, and oversees Programme delivery. The value of this group is in its broad representation, providing the strategic ambition to drive SF2040 in partnership with Seafish, Defra, and other public and private organisations in order to achieve the vision of a truly thriving seafood industry.

The SF2040 Seafood Industry Leadership Group

Chair: Dr Neil Auchterlonie

SF2040: Kimberly Cullen

Catching: Chloe Rogers, UK Association of Fish Producers Organisations; Paul Trebilcock, Cornish Fish Producers Organisation (until July 2021); and Andrew Locker, National Federation of Fishermen's Organisations

Catching – Wild shellfish: Jim Portus MBE, South Western Fish Producers Organisation

Aquaculture: James Fox Davies, Fowey Shellfish Ltd & SF2040 Aquaculture Leadership Group Chair

Processing: Stuart Price, Nomad; Nathan de Rozarieux, Falfish Ltd; and Nigel Edwards, Hilton Food Group

Retail: Ally Dingwall, Sainsbury's

Science: Dr Mark Berry, Seafish Expert Panel Chair

Young Seafood Leaders Network: Cameron Moffat, Youngs Seafood

Government: Nicola Robinson, Marine & Fisheries Division, Department for the Environment, Food & Rural Affairs (Defra)

Non-Departmental Public Body: The Sea Fish Industry Authority (Seafish) Executive team

Foodservice: Sarah Phillips, M & J Seafood

The SF2040 Aquaculture Leadership Group (ALG)

The purpose of the ALG is to champion and progress the SF2040 Recommendations relating to aquaculture and the actions within the English Aquaculture Strategy on behalf of the SILG.

The value of this group is in:

1. providing the strategic and operational drive to advance SF2040 in partnership with Seafish, government and other relevant organisations in order to reduce bureaucratic and regulatory barriers to aquaculture growth, innovation and productivity;
2. focusing on aquaculture improvements that are pragmatic in the short and long-term;
3. driving localised land and sea stakeholder engagement; and
4. enabling real change to support the shellfish industry to expand within realistic conditions.

The SF2040 Aquaculture Leadership Group

Chair: James Fox Davies, Fowey Shellfish, Ltd

SF2040: Kimberly Cullen

Finfish: Oliver Robinson, British Trout Association

Shellfish: David Jarrad, Shellfish Association of Great Britain; John Holmyard, Offshore Shellfish, Ltd; and Kelsey Thompson, Morecambe Bay Oysters

Aquaculture industry: Martin Syvret, AquaFish Solutions, Ltd

Macroalgae: Angela Mead, Biome Algae, Ltd

Government: Ruth Allin & Sara Catahan, Department for the Environment, Food & Rural Affairs (Defra); and Dr Stuart McLanaghan, The Sea Fish Industry Authority (Seafish)

Regulator: Roger Covey & Robert Whiteley, Natural England; Michael Gubbins, Centre for the Environment, Fisheries and Aquaculture Sciences (Cefas); and Dr Christopher Sweeting (Evidence), Jennifer Ford (Licensing), and Benjamin Coppin (Marine Planning), Marine Management Organisation

Aquaculture academia: Dr Lewis Le Vay, Bangor University

Delivering the SF2040 Ambition

The SF2040 Programme has been active since September 2018. Throughout this time, and with the support of the SILG and the ALG, progress has been made against the original 25 Recommendations. The seafood industry is highly dynamic, and with the obvious impacts of a changing world due to events like the COVID pandemic and the EU-Exit, the Programme is required arguably now more than ever to facilitate long term, strategic development.

This 20-year framework is of the utmost importance, and often overlooked, when an industry suffers from the challenging impacts in the here and now. Many of the SF2040 Recommendations are to be realised over a decades-long timescale, therefore, it can be easy to disregard such work when the very real priorities of producing and selling seafood during a pandemic and the EU-Exit transition require the full attention of many of our colleagues. This SF2040 refresh during a difficult time makes the contributions of those on SILG and ALG – industry and government – all the more valuable. Their meaningful contributions to updating the Recommendations help to secure the relevance of the SF2040 Programme and the longer-term sustainability of our industry.

In addition to those more obvious impacts we also have a range of other more recent factors including the publication of the Fisheries Act in 2020 (providing opportunities for how the UK will manage fisheries and aquaculture as an independent coastal State), the development of a National Food Policy, Blue

Growth agenda (both in the UK and abroad), climate change mitigation and carbon net zero targets, and a widespread recognition of the importance of aquatic protein both in terms of diet and low comparative environmental impact. All this, and more, fed into the SF2040 Recommendations refresh exercise.

The Refreshed Recommendations

All 25 original Recommendations were reviewed throughout 2020 to ensure the Programme continues to be relevant to both government and industry. Stakeholder engagement with SILG and ALG, Defra and Seafish teams, and industry experts guided the Secretariat in consolidating down to 19, losing nothing of our coverage in doing so. The SF2040 Secretariat will continue to work with SILG, ALG and other government and industry partners to progress these Recommendations and integrate where work is already underway. The refreshed 19 Recommendations are meaningful actions that support the English seafood industry as they move toward a thriving and sustainable future.

Foundation Recommendations

(best practice, science, nutrition, environment)

1

Maintain the Seafood 2040 Programme to continue supporting England's industry toward a sustainable and thriving future by 2040.

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.
2. Continue to progress the delivery plan within the Strategic Framework and ensure relevance.
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.

Further information:

- Participants: SF2040 – SILG, ALG and Secretariat.

2

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.

1. Identify and map research and innovation needs across England's seafood supply chain.
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.
3. Secure funding to support business growth within England's seafood supply chain, especially through the adoption of innovation and new technology.
4. Improve awareness of public sector funding opportunities within the seafood industry; encourage industrial organisations to form collaborative partnerships with academia and funding bodies.

Further information:

- Will require funding to achieve the activities.
- Participants: SF2040 SILG and Secretariat, and the Seafish Expert Panel.

3

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.

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.



Further information:

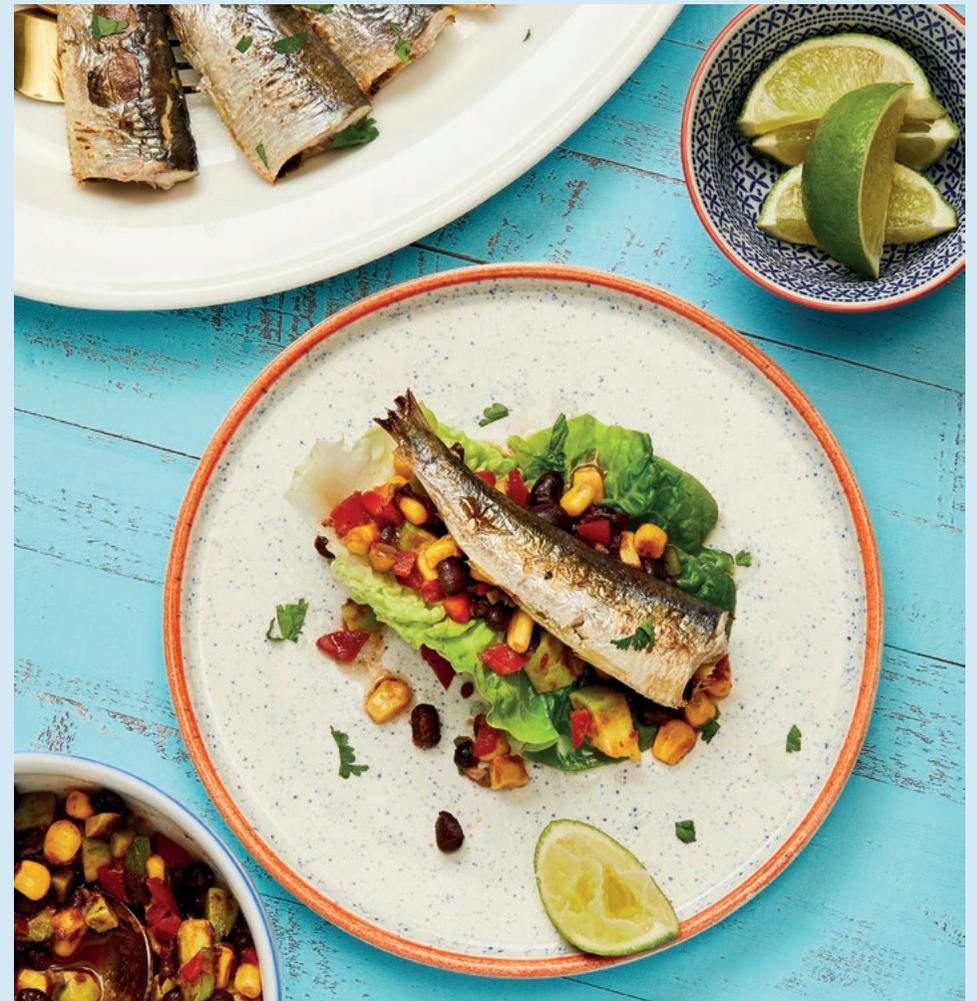
- Will require funding to commission mapping exercise.
- Outputs to include a series of benchmarking and guidance reports providing information on the industry's activities (and future activities via horizon-scanning) including suggestions / recommendations for change over time where that may be beneficial.
- 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.
- Participants: Fisheries, Aquaculture, and Processing sectors; Wholesalers and retailers; Standard bodies; Seafish; Defra.
- Linked to Recommendation 15.

4

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.

Further information:

- Funding required to commission and achieve the review.
- The resulting output should include where seafood sits in an overall healthy diet supported by science.
- Linked to Recommendations 6 and 7.
- Participants: SF2040 SILG and the SF2040 Secretariat.



5

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:

- Raw Material supply
- Manufacturing & Processing
- Transportation
- Usage & Retail
- Waste Disposal

Further information:

- 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.
- 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.
- Funding is required and could come from multiple potential sources, including: FaSS, Research Councils and Defra.
- Possible partners include: universities, Seafish, Cefas, CIEL, processors, and retailers.

6

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.

1. Validate and build on the research already delivered against Recommendation 6 in 2020 for cancer and Type-2 diabetes.
2. Investigate effects of increased seafood consumption, by demographic group, in relation to a range of wellness indicators.

Further information:

- Linked to Recommendations 4 and 7.
- Funding required to commission and achieve the research.
- Participants: SF2040 SILG and the SF2040 Secretariat.



Marketing Recommendations

7

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.

Further information:

- Linked to Recommendations 4 and 6.
- Participants: SF2040 SILG and the SF2040 Secretariat, Seafish.
- Possible partners: Local Enterprise Partnerships, Local Councils, Producer Organisations, etc.

8

Explore options that will support a domestic market demand for a wider variety of English-caught species and farmed fish and shellfish.

1. Investigate potential domestic market opportunities for underutilised and undervalued species in the UK market.
2. Develop a common approach to marketing less well-known species where consumer acceptance could be achieved, working with retail, foodservice and public sectors.
3. Explore whether mutual benefit between the tourism and heritage sectors and the primary fishing and seafood sectors can be achieved.

Further information:

- Linked to Recommendations 7 and 15.
- Funding required to commission and achieve the research.
- Outputs include detailed reports providing an overview of the issues, including recommendations for where domestic market opportunities may be strengthened.
- Participants: SF2040 SILG and the SF2040 Secretariat, Seafish.

Catching and Aquaculture Recommendations

9

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:

1. Consider what more can be done to utilise resources better and reflect on the effectiveness of the changes being introduced from 2022; and
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.

Further information:

- This Recommendation is primarily led by Defra. The SF2040 Programme will support government in their efforts.
- Participants: Defra, Producer Organisations (POs).

* 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.

10

Support England's seafood industry and government implementation of the Fisheries Act 2020.

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.
2. Encourage co-management between the catching sector, aquaculture sector, regulators, government, and the supply chain.

Further information:

- The SF2040 Programme can organise and facilitate workshops across government and industry as well as compile and communicate information and findings.
- Participants: Defra, Seafish, industry and SF2040 SILG and Secretariat.

11

Work with Producer Organisations (POs) to build on their strengths, and improving where necessary and exploring potential for new responsibilities

1. Where appropriate, consult POs on negotiations and agreements impacting fishing opportunities.
2. Ensure fit for purpose regulation and effective enforcement underpins a level playing field and high standards.
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.

Further information:

- This Recommendation is Defra led and the SF2040 Programme offers support.
- Linked to Recommendations 8, 9, 10, 13, 15 and 16.
- Participants: Defra and the Association of Fish Producer's Organisations.



12

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.

1. Support and encourage English Aquaculture Strategy (EAS) progress. In particular:
 - a. Commission project work where appropriate and deemed important within the delivery plan (ALG and SF2040 Secretariat).
 - 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). 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).

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).
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).

Further information:

- The SF2040 Secretariat and ALG will work toward the achievement of the English Aquaculture Strategy delivery plan as well as this Recommendation.
- Linked to Recommendations 8, 10, 13, 15 and 16.
- Participants are listed in the Recommendation.

Enabling Business Growth Recommendations

(infrastructure, training, supply chain resilience, maximizing seafood resource)

13

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 utilise the support they can provide in regional economic growth. Review seafood facility / infrastructure good practice in similar countries.

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.



Further information:

- Secure funding and commission work.
- Linked to Recommendations 15 and 19.
- Participants: Defra, SF2040 SILG, ALG & 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.

14

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.

Further information:

- The SF2040 Programme will support Seafish's efforts to achieve the Recommendation.
- Participants: Seafish, industry.



15

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.

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:
 - a. Disaggregate the supply chain into sectors and include exports and imports. Different sectors will have different scenarios and solutions.
 - 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.

16

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).
3. Promote and engage pre-competitive research into product development to support improved economic value of England's seafood product.

Further information:

- Requires funding to commission the evaluation.
- Linked to Recommendations 8, 16 and 19.
- Participants: Industry, Government.

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'.

1. Signpost the industry to existing information and tools to help address opportunities to reduce waste and maximise yield and value in production.
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.
3. Exploit potential markets for verifiably sustainable under-utilised species.
4. Quantify socio-economic importance of fishmeal sector in protein to better inform policy and decision making within the seafood value chain.

Further information:

- Requires funding to achieve the actions.
- Linked to Recommendations 8, 15 and 19.
- Possible participants: Seafish Expert Panel.

17

Ensure English seafood is fully factored in the Government's export growth and promotion activities including Free Trade Agreements.

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.
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.

Further information:

- The SF2040 Secretariat can facilitate meetings with Defra, Seafish and DIT involved in the planning.
- Linked to Recommendations 15 and 19.
- Participants: Defra, Seafish, DIT.

18

Support and encourage the UK Government in the ongoing facilitation of favourable international free trade and preferential tariff agreements.

1. Assess the current and future tariff environment and future for the processing sector from both export and import perspectives.
2. Discuss measures of success with Government. For example, how will a FTA be determined beneficial to the English seafood industry? What would be the opportunities and gains for English importers and exporters?

Further information:

- 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.
- The assessment exercise of the current and future tariff environment will require funding to achieve.
- Linked to Recommendation 17 and 18.
- Participants: Defra, DIT, Seafish and industry.

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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.

Further information:

- Will require funding to achieve the activities.
- Linked to Recommendations 13, 17 and 18.
- Participants: Defra, Seafish, SF2040 SILG, and industry (e.g. Seafood Industry Alliance).



For more information about Seafood 2040:

Contact **Kimberly Cullen**

M: +44 (0) 7876 035762

E: kimberly.cullen@seafish.co.uk

SEAFOOD 2040



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