

Minutes of the Processor & Import Panel Tuesday 29th September 2020 (via Zoom)

Attendees:

Jon Parker (Chair and CamNesa)
Iain Shone (Global Aquaculture Alliance)
Mike Glavin (Food Standards Agency)
Neil Cursons (Blue Oceans)
Richard Stansfield (Flatfish Ltd)
Simon Dwyer (Grimsby Fish Merchants Assoc.)
Simon Rilatt (Espersen)
Sturri Haraldsson (Norebo Europe Ltd)
Victor West (Associated Seafoods Ltd)
Dominic Collins (New England Seafood)
Elise Moyes (Nomad Foods)

Seafish:
Aoife Martin
Hazel Curtis
Marcus Coleman
Stuart McLanaghan (Secretariat)
Ana Witteveen (agenda item 8)
Lewis Tattersall (agenda item 10)
Angus Garrett (guest)

Welcome and introductions:

1. **JP** welcomed everyone to the meeting and outlined the format for the virtual meeting.

Apologies:

2. Apologies were noted from:
 - Adam Peasey - deputised by Dominic Collins (New England Seafood)
 - Stuart Caborn – deputised by Elise Moyes (Nomad Foods)
 - Laky Zervudachi (Direct Seafoods)
 - Gary Warner (Warners Fish Merchants)

Minutes of previous meeting and actions arising:

3. The minutes of the previous Panel meeting (20th July 2020) were reviewed and accepted as an accurate record.

Actions arising:

4. **SM** confirmed that the actions from the previous meeting had been addressed.

Seafish Round-up

5. **MC** - The Covid-19 pandemic continues to have a very substantial impact on the UK seafood industry. Seafish is funded by a levy on seafood as it is first sold in the UK, and the significant downturn in seafood business has led to a dramatic reduction in levy received. As a result, Seafish has reviewed its operations and decided it must reduce expenditure, to remain viable and keep supporting the seafood sector, as it faces the challenges of Covid-19 and EU-departure. Regrettably, this has necessitated a reduction in the number of roles at Seafish and some people have now left due to these redundancies. This decision will impact certain

activities or products that Seafish will no longer be providing, or reduced levels of service that will be offered.

6. Our offices remain closed and all staff are equipped to work from home, and continue to support the UK seafood industry. A return to office working is anticipated during 2021. We remain committed to supporting the UK seafood sector through the challenges ahead, and plans for the current business year include ongoing delivery of key services, with a focus on Brexit, Covid and our new consumer-facing marketing platform, Love Seafood.
7. Our Issues Groups are working well in online 'bite-size' format (*post-meeting update: overall 2020/21 attendance to date stands at 773 and over the same period, Seafish's monthly e-alert updates have reached 23,000 stakeholders, with 25% growth in numbers from April to October.*)
8. Seafish's fishing safety campaign 'Home and Dry' (reported at the July meeting) - developed in collaboration with partners in the Fishing Industry Safety Group - has attracted considerable social media interest. As part of the 'Future of Our Inshore Fisheries' project, Seafish is supporting three new fisheries management groups (overarching Shellfish Industry Advisory Group and separate groups for whelk and crab / lobster), to focus on the implementation of national-level strategic management for the UK. Seafish is also chairing and supporting the work of the North Atlantic Pelagic Advocacy Group, a new supply chain led initiative focused on driving improvements in the management of the NE Atlantic fisheries for mackerel, herring and blue whiting.
9. The Seafish Board decided in November 2019 to carry out a Strategic Review in 2020. The Covid-19 pandemic has delayed this process, but preparations are now being made for 2021. The aim of this Review is to strengthen Seafish's offering and ensure the organisation is best structured to help the UK seafood sector to thrive, now and in the future. Seafish is currently talking to its four sponsoring government departments across the devolved administrations, before engaging with its three Sector Panels in 2021.
10. Due to the tenure ending for a number of Seafish Board members, Defra is currently recruiting for a new Chair, two industry positions representing the processing sector and marine/fisheries science, and two positions independent of the seafood sector. For more details [visit](#).
11. Questions and answers:
 - **DC** – how has Seafish's income been affected by Covid-19? **MC** – income was largely as anticipated until March, but from the end-March to May there was a downturn, after which it has broadly recovered. Annually, Seafish normally collects £8.3M in levy; this financial year's receipts are already £800k (c.10%) down, but stabilising. Seafood retail has helped to counteract the downturn, but this does not cover all Food Service losses and where this part of the sector is also experiencing business closures. Shellfish landings have been worst affected and white fish landings are down 20-25%. Imports are also 9-10% down and again mainly for white fish.

Covid-19 update

12. **AM** – at the last Panel meeting an update was provided on the three-phased approach (response, recovery and reset) adopted to support the seafood industry to remain viable during and beyond the pandemic. Industry is now in the ‘recovery phase’ and lessons need to be learnt from the initial crises response, to inform a 2nd potential Covid-19 spike. Seafish’s work on supply chain impacts will be implemented for industry over the next five to six months.
13. **AW** – presented Seafish’s [1st-quarter report](#) which provides an overview of the impacts of the Covid-19 pandemic on the UK seafood sector in the first-half of 2020. It takes a high-level view of the whole of the seafood supply chain to explore the impact on UK seafood markets, seafood business operations and consumer behaviour. Seafish has drawn on qualitative and quantitative data available at the time of writing, including official statistics, industry insights and published news articles. The report also includes links to data sources and other resources to allow readers to access detail further to the top line information provided. This report will be produced quarterly, providing a rolling update of Covid-19 impacts on the UK seafood industry. Subsequent reports will feature the latest industry data collected through the Seafish fleet and processing surveys as these data are finalised. Seafish expects to release the next report, covering July-September, in December 2020.
14. Questions and answers:
 - Industry feedback: the report had been downloaded and circulated, and Seafish is to be congratulated for the insights it provides.

Action #1: Seafish to circulate all presentation slides

EU-Exit Transition Support

15. **AM** – provided an update on Seafish’s EU-exit transition support. The key work activities are:
 - The updated Exit Guide - relaunched in early September and renamed the [End of Transition Period Guide](#) – remains the go-to place for the seafood supply chain. The key change is distinguishing between the requirements that apply at a UK level and those which will only apply to Great Britain (GB.) It is important to keep checking Seafish’s website as the Guide is updated regularly as new information becomes available.
 - The NI Protocol – which remains politically sensitive due to the Internal Market Bill – is expected to impact fishing vessels both operating from and landing into Northern Irish ports. Seafish is working closely with DEFRA and DAERA to understand how and where checks will take place in GB/NI. Whilst Seafish is currently restricted on what information it can share with industry stakeholders, standalone guidance will be produced.
 - On emerging issues, Seafish’s approach is to work with businesses to understand the issue, collaborate with the relevant regulator to provide a solution, and then update businesses likely to be affected. Finally, to update guidance for all. A series of webinars will be delivered that focused on specific topics associated with the EU-transition period (imports, exports, and fishing vessels.) An ‘on call’ service will be also established over

the New Year to provide emergency advice and support. For further Seafish support on EU-exit [visit](#).

- Future trade work will firstly focus on ensuring the opportunities and potential implications for seafood from new [FTA](#) are understood, addressed and realised. Secondly, support will be provided to industry, to access overseas markets through trade promotion work.
- The new GB Imports system IPAFFS will go live for imports of Products of Animal Origin into GB from non EU countries on 7th December. All import notifications currently lodged in the EU Traces system will be required to be completed in IPAFFS from that date and before, if consignments are on the water. If a business is not registered for an account in IPAFFS, it will not be able to import any fish/fishery products into GB (from 7th December.) If importers need to register, they should go to the Gov.UK pages on Imports to register. Imports into NI will still be required to be lodged into Traces as they will remain as part of the EU.

16. Questions and answers:

- **SD** – there is a distinct lack of understanding at the port of departure on transit documentation requirements. For example, for fresh white fish and salmon leaving Norway, transit documentation is produced for export purposes, but where these products subsequently transit through another EU country (e.g. Rotterdam, Holland) before reaching the UK. There could in theory be 10 consignments in one HGV destined for 10 different companies; if one of these consignments is stopped due to erroneous documents, then they all stop. The Norwegian mood music is that there will not be an EU-deal with the UK, resulting in a risk of a real “car crash” from 01.01.21.”
- **SR** - autonomous tariff quotas (ATQs) are a long-established EU-system allowing a certain quantity of a product to be imported into the EU at a reduced preferential tariff rate (usually 0%.) The UK has implemented primary legislation recognising the need for our own ATQs system. Additional tariff relief can be gained through FTAs (Free Trade Agreements). Any EU-FTAs do not transfer to the UK after January 1st 2021. The UK is in active negotiation with several countries some of which are particularly important in seafood – eg. Norway and Iceland. **AM** – Seafish is working with Defra on this issue and more information will be shared in due course.

Launch of Love Seafood (LS)

17. **HC** – provided an update on Love Seafood by Seafish – our new consumer brand, the platform for our 20 year initiative, which will include an ongoing series of campaigns, to grow seafood consumption. The new brand is being launched this week, and HC gave an overview of the media activities planned over the launch period, which is essentially the remainder of 2020. This will include a “test and learn” approach to inform what which channels, content, etc works best with our target audiences.
18. Measuring the long-term success of this strategic approach will centre on progress towards average UK consumption of two portions of seafood per person, per week. However, in the shorter-term, Seafish is following the Government approved AMEC framework which covers: outputs, outtakes and outcomes for all measurement areas. Changing culture and attitudes

towards seafood is seen as a prerequisite to higher sustained consumption. The three broad objectives for LS activity that will be measured are:

- Drive awareness of Love Seafood brand and activity;
 - Increase consumer understanding of ‘reasons to buy’; and
 - Increase consumer consideration and desire to eat more seafood, more often.
19. Regional marketing activity will be targeted at the home nation-level, making use of regional budgets; tenders have already been received to deliver this work in NI. Seafish is also working with stakeholders in Scotland, including Seafood Scotland, on what ‘over and above’ support activities can be offered using the LS brand.
20. Planning is underway for the year two of LS which will draw upon the learning and outputs from the year one (which has only six months of activity.) Views are being sought from Seafish’s three Sector Panels, to inform the LS Group’s deliberations. Processes for developing and sharing assets are in place and will build on learning to date. LS sample content was shared with Panel members including: launch campaign concepts, an ‘industry toolkit’, brand ‘look and feel’ and on building an emotional connection with people.
21. Questions and answers:
- **RS** – should LS include more British ‘seafood lines’ and evidence of sustainability credentials? **HC** – whilst LS does not promote specific products (e.g. fresh, frozen or processed), available assets will enable industry to use these resources to help sell their own products. Also, whilst Seafish can draw on the wider sustainability credentials of seafood, it cannot use these to promote specific seafood species. **AM** – sustainability and responsible sourcing remain a major work focus for Seafish both nationally (e.g. Cod, Blue Whiting and Mackerel) and regionally (e.g. Brill as part of the SW England Ecological Risk Assessment project.)

Industry Round-up

22. **EM** – Nomad Foods has various Brexit challenges ahead and internal weekly steering group meetings are being used to determine the best way forward. One major ingredient issue for processed products has resulted from 2020 being one of the worst potato harvests for many years. Nomad presented at the last meeting of the Seafish Board on its Strategy for 2020 and beyond, and which was well received. There is a business aspiration to expand the range of chilled products (e.g. sea-bass) and consideration is being given on how to sustainably bring these species on board, so that they are available long-term. A marketing dashboard has been developed which Nomad is happy to share with Seafish and dialogue between both organisations is enabling information on horizon scanning to be shared.
23. **MG** – no further comments to add to those raised earlier on EU-exit transition support.
24. **VW** – thanks and appreciation expressed to Seafish for the really valuable updates, especially on EU-exit transition. Sadness was also expressed on the redundancies’ announcement. Covid-19 remains the main operating challenge for Associated Seafoods; in particular work to ensure Environmental Health Officer inspections in Scotland consistently apply rules and on which the business is in discussion with the Scottish Government. Whilst times are challenging the

business is doing ok. As the winter quarter approaches, an additional challenge will be the ability to determine whether a cold is a cold, or Covid-19.

25. **SH** – Norebo faced its biggest Covid-19 challenges during April / May, but business trading has been quite strong in the interim. 2020 overall has seen the business sell more seafood product in the UK than in the previous year and which is currently the strongest operating market. Good retail demand is being seen for frozen products, but food service remains poor aside from very strong sales in the fish and chips sector. The UK Government’s ‘Eat Out to Help Out’ scheme had also been helpful. It is also evident that consumers are looking for greater product value (e.g. pollock frozen at sea.)
26. **NC** – Seafish was congratulated on the imminent launch of LS. Blue Oceans remains busy setting up its new processing facility in Kent which it plans to open in February 2021. The company is working with the local council who are very keen to promote locally sourced seafood, but uncertain how this will be delivered on the ground post EU-transition. The local MP for North Thanet (Kent), Peter Gail is also campaigning to support locally caught, processed and chilled seafood. Concerns were expressed that the Calais Border Inspection Post has not formally been set-up.
27. **SD** – the focus remains on supporting the 40 local small processors and the network of small importers on EU-transition preparedness. Gratitude was expressed for the support provided by Ivan Bartolo, Seafish which had proved “invaluable” for local businesses. A forum had also been convened with the Grimsby seafood cluster to bring them up to date on latest transitional developments. The ‘Made Great in Grimsby’ quality mark brand is now trademarked and one of Grimsby’s oldest smokehouses (Alfred Enderby) achieved the highest accolade (3 stars) at the Guild of Fine Foods annual Great Taste Awards. The region has now also experienced its first two Covid-19 cases.
28. **SR** – from the Seafood Industry Alliance’s perspective, business was experiencing uncertainties on a range of issues; at times it is difficult to differentiate whether these relate to Covid-19, EU-transition or both. Business needs clarity, but uncertain times will likely continue for the next few months.
29. **DC** – The health, safety, security and wellbeing of staff at NESI’s Grimsby and Chessington processing plants remains the number one priority. This includes investment, communications and employee temperature scanning. The management team continues to work from home. Brexit is again shining a light on the depth / breadth of cold storage capacity in Grimsby and NE England. The UK’s ability to strike a deal with Norway, to continue trade in case of no-deal Brexit, has potentially huge implications for the business. ICES advice is awaited for Barents Sea cod which could show an increase in advised catches.
30. **IS** - Sadness was also expressed on the Seafish redundancies’ announcement ... “the organisation’s support is always greatly received.” Encouragingly, the retail sector demand is good and continues its focus on both quality and sustainability. There is also a major push for sustainable feed ingredients. Encouragingly, next week’s Global Aquaculture Alliance

conference will be the largest to date. A brief update was provided at the last Panel meeting on the move towards virtual audits on account of Covid-19 travel restrictions; this is now looking likely to become the 'new norm' and vessel / processing facility audits are now being piloted worldwide. It is also understood that China recently held an "in person" 2020 seafood conference.

31. **RS (via chat as microphone not working)** – the current main issues facing the business relate to staffing levels and also maintaining a balance between retail and food service markets.

Overview of Seafish's Carbon Work Programme

32. LC – provided an overview of Seafish's new 'carbon emissions in seafood' work programme which lays out the priorities for the next 12-18 months, with regards to climate change mitigation (carbon footprint) across the seafood supply chain. This work programme was developed following a stakeholder meeting in April 2020. The four priority areas are:
- a. Update and enhance Seafish's practical carbon emissions resources, centred on the carbon emissions profiling tool;
 - b. Develop a communications strategy to build climate change awareness and support industry reputation building for stakeholders and seafood consumers;
 - c. Build a strong knowledge base to inform/underpin the sector's climate change narrative and aid evidenced decision making; and
 - d. Distil complex climate change issues and messages for non-technical audiences, and provide advice for industry stakeholders and other parties

Recruitment Recommendation / Terms of Reference Review

33. **MC** – the Panel currently has one vacancy and a few members are also approaching the end of their tenure. Following the recent recruitment exercise, four applicants have been received from across the seafood supply chain. Seafish / JP will review the applications and the Panel's tenure register before finalising candidate selection. The outcome of the recruitment process will be communicated to all Panel members together with the circulated draft minutes.

Action #2: Seafish / JP to review applications and the tenure register, and finalise candidate selection.

Date of next meeting

34. Panel members were canvassed on whether to arrange the next meeting for April 2021 (in line with the pre-Covid-19 meeting cycle), or to hold a meeting sooner. There was a consensus to hold the meeting towards the end-January 2021, to enable both Seafish and industry to report back on the first few weeks trading post EU-transition.

Meeting close

35. The Chair thanked all Panel members for their contributions and closed the meeting.

Action #3: Seafish to circulate a doodle poll to identify the most suitable end-January 2021 meeting date.

Action List

No.	Action	Date resolved and supporting notes
1	Seafish to circulate presentation slides	Emailed 29 th September 2020
2	Seafish / JP to review applications and the tenure register, and finalise candidate selection.	<ul style="list-style-type: none"> • End of tenure: Gary Warner, Warners Fish Merchants • New individual members recruited: <ul style="list-style-type: none"> • Scott Johnston (Technical & CSR Director, Young's Seafood Ltd) • Roy Cunningham (consultant, Camalltaidh Ltd)
3	Seafish to arrange an additional meeting	Doodle poll circulated: next Zoom meeting date: Wednesday 27 th January 10am to 12pm