



2015-2016
**Delivery
Report**

SEAFISH
the authority on seafood



Welcome from our Chief Executive

This Delivery Report presents the results of our work over the first year of our 2015-18 Corporate Plan, and should be seen in reference to our Annual Plan 2015-16 and our annual report and accounts.

Across our workstreams, we have notable achievements to communicate and I would like to take this opportunity to thank our staff for the dedication, professionalism and sheer hard work that has allowed us to achieve our targets and, in many cases, exceed them.

I am pleased to say that we have many more successes than failures, but where we have fallen short on our objectives, we have been clear in saying so. Our aim in reporting the detail of our delivery is total transparency and it reflects an open and honest culture, where mistakes are recognised and valuable lessons learned.

In a diverse and sometimes conflicted industry, one of the key benefits that Seafish can bring to the table is unity. Agreeing and delivering a shared agenda is no easy task and requires commitment, optimism and a can-do attitude that sets aside self-interest for the greater good.

It is only by working together in this way that we can realise our bold ambitions; a truth borne out in this document, which shows our areas of greatest success have been those where we have worked closely with our industry colleagues.

As this Delivery Report goes to print, we are already looking ahead to our Corporate Plan 2018-21, working with our Panels and Board to ensure our work will be adding value in the years to come.



Marcus Coleman
Chief Executive



PROGRAMME

Promote Consumption: Seafish Campaigns

Our work to get 'more people eating more fish more often' will draw on a range of marketing and PR tools to grow consumption across all audiences and all industry sectors.

WORK PROGRAMME OVERALL KPI

Before and after campaign consumer research demonstrates a positive impact on seafood consumption.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- Three consumer campaigns.
- Growth in Fish is the Dish audience.
- Trade ambassador programme in place.
- Pilot study for hub and spoke education delivery.

PROJECT

CONSUMER CAMPAIGNS

A range of promotional activity to bring home the 'more fish more often' message.

FISH IS THE DISH

Our digital platform.

TRADE PROGRAMME

Building awareness of the value of seafood.

EDUCATION - EXPANDING OUR REACH

Inspiring future generations.

DELIVERY ON TARGETS 2015-2016

- Our work on Fish and chips has been enhanced this year through a range of functional activities.
- National Fish & Chip Awards 2016 Media coverage reached 1.4b people. For every £1 spent on media activity, 56k stakeholders were reached.
- National Fish and & Chip Day generated 111 pieces of media coverage (including 23 broadcast pieces) reaching 111k people, with related social media activity resulting in #nationalfishandchipday trending in the UK.
- Our Superfishoil campaign spread the health message far and wide, generating a total of 103m views for key messages. Celebrity chef John Torode and leading charity Heart Research UK helped bring the message to life.
- Seasonal recipe placements brought a great deal of success to our campaign work - from Halloween, Christmas and Valentine's Day to our more creative Star Wars promotion.

- Fish is the Dish has continued to grow its reach achieving 1.8m website page views through 375k unique users. The digital reach of our consumer work through social media grew to 472m compared to 231m the previous year. Clever packaging of consumer-centred content and award winning campaign work on health and recipe media placement ensured the positive results for this work.

- UK Young Seafood Chef of the Year increased PR promotion to 250 catering colleges with 52 students who competed in the first round. Winners of the competition also delivered the World Seafood Congress 2015 Gala dinner. In addition to this work 27 Chef Lecturers went on industry study trips and 120 Seafood Guides distributed to college entrants.
- Trade Ambassador programme secured two Craft Guild of Chefs Ambassadors. 12 UK-wide field events helped promote seafood through a range of interventions.

- Our work with Billingsgate promoted seafood to 29 catering colleges whose students will now be showcasing seafood to their local schools.
- We enhanced our educational pages on Fish is the Dish to include industry case studies that would inspire businesses to get into schools and help educate future consumers.

National Fish & Chip Awards 2016

The 28th National Fish & Chip Awards were a resounding success this year. The strategy for this year was to position the awards as the 'Oscars' for the industry and to firmly place fish and chips as the UK's favourite takeaway.

182 media releases were issued to the press with 880 pieces of coverage recorded. The coverage achieved 99% positive tone of voice reaching an outstanding 1.4 billion people. Key highlights of the media work included 11 minutes of airtime on ITV's This Morning and mention on Sky News and ITV's Lorraine show.

Sponsor funded study trips to Norway and Peterhead provided once in a life time learning journeys for the finalists.

Our @FishnChipAwards twitter account achieved huge success this year with an overall reach of 14m, a 61% increase on last year's performance. We saw twitter followers growing by 39% this year, topping the 3,000 mark in February 2016.

On the day of the National Fish & Chip Awards, we hosted a pop-up fish and chip stall in London at Spitalfields Market to engage consumers with the NFG&CA ceremony. The stall was themed in the black and gold Oscar style to encapsulate the glamour of the awards and working with Poppies F&C shop, 1,000 sample portions of fish and chips were served to busy Londoners during the lunchtime rush. The event raised consumer awareness and buzz around the awards, encouraging the public to celebrate the nation's favourite takeaway.

Other promoting consumption highlights

- Working on the European Funded Acrunet Brown Crab project with a range of industry partners, we created an integrated campaign which achieved 54 pieces of coverage including Hello, Top Santé and The Times and reached over 9.3 million consumers through social media.
- This year we built on the previous success of our award winning omega-3 Superfishoil campaign with a range of ambassadors including celebrity chef John Torode. Our omega-3 campaign reached 103 million people across digital and media channels.
- We had great success with recipe placements, our highlight of the year was when our Star Wars featured recipes hit the headlines on a range of publications including The Telegraph and Sainsbury's online channel MadebyYou.
- Our Marcomms team were finalists in a range of awards including two prestigious UK schemes. For the Chartered Institute of Marketing (CIM) we received three shortlistings, recognising our omega-3 work and the excellence of our Marcomms team. For the UK Marketing Society awards, Seafish were announced finalists alongside M&S, Britvic and Direct Line for building marketing capabilities showing staff excellence.





PROGRAMME

Promote Consumption: Industry Support

Our industry support programme will add real weight to Seafish's consumer campaigns, enabling industry to deliver their own promotional work and leverage the Seafish campaign spend.

WORK PROGRAMME OVERALL KPI

Before and after campaign consumer research demonstrates a positive impact on seafood consumption.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- Seafood Week established.
- e-Campaign suite available, with five industry partners actively engaged.

PROJECT

SEAFOOD WEEK

A promotional platform for the entire industry, from catch to plate.

E-CAMPAIGN SUITE

Development of a web-based resource that will enable industry partners to plan and deliver their own Fish is the Dish campaigns, offering training, insight and support in delivering local and sector specific promotions.

DELIVERY ON TARGETS 2015-2016

- Seafood Week successfully relaunched.
- Online and traditional marketing and support packs for industry rolled out.
- Seafood Week embedded into our education programme.
- Over 850 seafood, retail and food service brands on board.
- Underutilised species promoted throughout the campaign.
- We investigated and rejected the possibility of reintroducing the Seafood Awards, choosing instead to use existing relevant awards including Seafood Restaurant of the Year and the National Fish & Chip Awards to further the campaign's objectives.
- Our e-campaign suite was well supported by industry with journalists, mongers, fish and chips shops and major retailers using our Asset Bank.
- We now have 515 registered users of Asset Bank with 4789 assets available for download (974 assets added in 2015/6).



Seafood Week – 9-16 October 2015

“Seafood Week 2015 was a massive success at the Co-operative, where a co-ordinated campaign from digital to shelf-edge helped bring new shoppers to the category. The end result was double digit sales growth and nothing says a job well done more than that.”

Steve Addison, Category Buyer, The Co-operative Food

Seafood Week relaunched in 2015 after a number of years on the shelf. The strategy for this new campaign was to build a platform that all-industry could use to help promote consumption of seafood.

We set out to deliver a truly integrated campaign, bringing together marketing and PR, and combining traditional and digital elements all tailored to the specific sector needs of our stakeholders.

A brand-neutral Seafood Week suite of materials was developed with the aim of allowing seafood businesses to incorporate our collateral into their own communications and marketing work.

Our core objective was to drive consumption and get more people eating more fish more often but we also set out to deliver a number of important outcomes over and above our annual targets.

Determined to make the most of what we had delivered, we commissioned an independent Value for Money review that included a full cost to benefit analysis and a detailed exploration of what had been achieved. The report returned a very positive verdict, clearly evidencing that we had realised our ambitions, but also setting out some valuable learning that we’ll take forward to Seafood Week 2016.

Here’s how the campaign delivered:

CAMPAIGN KPI	ACHIEVED
<ul style="list-style-type: none"> An increase in consumer awareness of and confidence in seafood. 	Our You Gov research evidence 4% of those polled were aware of Seafood Week with a conversion rate which showed that those who had seen the campaign were 40% more likely to eat seafood as a result.
<ul style="list-style-type: none"> An increase in positive media coverage of seafood. 	We beat our coverage targets by quite some margin, with a readership of 76m in broadcast/print and online with an additional social media reach of over 54m.
<ul style="list-style-type: none"> An all industry platform for future collaboration. 	We set out to get five industry stakeholders involved in Seafood Week and ended up with 850 businesses on board, including top food brands and major retailers.
<ul style="list-style-type: none"> Value for money. 	Our independent Value for Money audit evidenced a minimum ROI of 25:1, beating the agreed Government standard of 4:1 by quite some margin.





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2015-2016
<p>Export Support</p> <p>Our export support programme will provide a platform for UK seafood exporters at key international seafood exhibitions and market information on 25 export destinations.</p>	<p>BRITISH PAVILIONS & INFORMATION STANDS</p> <ul style="list-style-type: none"> • Book, design and plan Seafood from Britain pavilions at two international seafood expos. Provide space for individual companies on the pavilion. • Plan and manage UK information stands/meeting points at key international seafood exhibitions. 	<ul style="list-style-type: none"> • British pavilions organised at Japan Seafood Expo, Tokyo in August and China Fisheries, Qingdao in November. Japan attended by eight UK seafood companies and part funded by SDI and China attended by thirteen companies. • Information stands organised at: Seafood Expo Asia, Hong Kong in September; Conxemar, Vigo in October; Seafex, Dubai in October and Seafood North America, Boston in March. Stands used to promote Seafish services, the UK industry and used by UK visitors to conduct meetings.
<p>WORK PROGRAMME OVERALL KPI</p> <p>Year on Year improvement in stakeholder satisfaction from baseline established in year one survey.</p>	<p>SEAFOOD BUYER RECEPTIONS</p> <p>Plan and manage receptions for seafood buyers and local administrators at two seafood shows per year.</p>	<ul style="list-style-type: none"> • Reception organised at the British Embassy, Tokyo, on the evening before the Japan Seafood Expo opened. Attended by the Ambassador and his Wife, British companies and their guests. • Reception held on the middle evening of China Fisheries. Attended by circa 240 guests and used to showcase British seafood to buyers and administrators from China and Asia.
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <ul style="list-style-type: none"> • Successful delivery of a programme of events at international seafood exhibitions as agreed with key seafood exporting companies. • 10% year on year increase in downloads of export guides. 	<p>EXPORT GUIDES</p> <p>Check and update where necessary the ten export guides that were originally commissioned in 2012.</p>	<ul style="list-style-type: none"> • Twenty five guides now available on the Seafish website. • The oldest nine guides were updated during the year. • 27,314 downloads in 2015 – 35% over target.

Japan Seafood Expo, the Big Sight, Tokyo, 19th to 21st August 2015

“This year’s Japan Seafood Show was extremely well run. From the dinner at the Embassy to the quality of the interpreters on the stand as well as the support from the team, the efforts to help companies export were tremendous. From my point of view it is imperative that these events are continued annually so that further business can be established and the great name of British Seafood further recognised around the globe.”

David Markham, Sales Director, Blue Seafood Company, Devon

Japan has always been a key target market for British seafood exports with potential for significant sales growth. Building relationships with buyers is imperative to success in Japan and the Seafish and Scottish Development International (SDI) pavilion gave exporting companies an ideal platform to meet import agents.

The pavilion was jointly branded Scottish and British and included a demonstration area where a chef from the UK carried out demonstrations and gave out tastings of British seafood.

The Japanese culture is very formal and one that acknowledges status and as such the Embassy reception, which was hosted by the British Ambassador and his wife, was a perfect opportunity to demonstrate the importance that the British companies put upon their relationships with the invited importers.





PROGRAMME

English Account Management

The English Account Manager ensures that the top 30 levy paying accounts have relevant access to all Seafish services. Bespoke projects are carried out with the budget allocated.

WORK PROGRAMME OVERALL KPI

Year on year improvement in stakeholder satisfaction from baseline established in Year 1 survey.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- 2 Supply Chain Projects.
- 3 Regional events.
- 30 key accounts identified and visits made.

PROJECT

ACCOUNT SUPPORT

Identify key accounts in England. Agree and allocate major accounts to the executive. Ensure regular contact with key accounts and introduce Seafish colleagues as required. Support FASFA with their strategy.

SEAFOOD GRIMSBY & HUMBER

To maintain strategic relationships between Seafish and Seafood Grimsby & Humber. 2nd phase of the Humber white van project to develop a marketing strategy and code of practice. Develop & support meeting space with an England Seafood stand at Global Seafood expo Brussels.

SUPPLY CHAIN SUPPORT

Organise a trade visit between Scotland and England to develop a better understanding of both the requirements of suppliers and buyers.

REGIONAL EVENTS

Deliver three seminars including the North Atlantic Seafood Forum. Develop the three day speaker programme for the World Seafood Congress.

DELIVERY ON TARGETS 2015-2016

- Contact made with all 30 identified accounts.
- Meetings spreadsheet kept up to date and contact forms completed where significant.
- Contacts have increased on the account database.
- FASFA projects delivered and meetings attended.

- Quarterly SGGH board meetings – all attended
- Marketing company identified. White van website developed, twitter & Facebook accounts in development.
- Seafood England stand was very well attended with B2B business success during the event.

- A successful trade visit was held in Peterhead attended by eight Humber stakeholders.
- A return visit saw nine delegates from Peterhead visit Grimsby; this included five skippers who benefited from learning more about the whole supply chain and the importance of accreditation requirements.

- Two seminars in Grimsby and one presentation at the NASEF.
- three day programme successfully delivered with no issues.

Key Highlights

- The Top 30 accounts include many importers and distributors, meetings have been positive and on-going engagement in areas such as regulation, responsible sourcing, market insight, Seafood Week and attendance at Seafish seminars have been achieved.
- The Scottish supply chain project saw the return trade visit, with nine delegates visiting Grimsby; this project has assisted with improving collaboration and provided a platform for business to business meetings between the Humber and Peterhead for the whitefish industry.
- Three industry seminars have been successfully delivered in collaboration with Seafish colleagues. They attracted representatives from the levy paying companies and were very well attended. Very positive feedback was received from participants and there is a clear demand for further workshops and seminars.

Building Relationships

A mission to the Peterhead from Humberside and a return visit was co-ordinated to improve the relationships between the two areas and assist with supply opportunities. Both trade visits were a success with collaboration and relationships being improved.

"...Chatting to the skippers who attended the trip all were singing the praise of Seafish for organising such a learning journey, and like me, hope this is just one of many to come. From the dinner and in depth chat around the new RFS scheme to the visit to Grimsby market then Flatfish, they all came away with a clearer understanding of which direction the industry is heading - especially a clearer understanding of what it takes to get their fish on the shelves of UK retailers."

Will Clark of the SWFPA following a trade visit to Humber region





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2015-2016
<p>Seafish Scotland</p> <p>The overarching aim of Seafish the Scotland is to support the sustainable development and growth in Scotland.</p>	<p>SEAFOOD SCOTLAND</p> <p>Dealing with all seafood species, Seafood Scotland is a non-political organisation that works throughout the supply chain.</p> <p>Seafish Scotland provided project management support to Seafood Scotland ensuring that all projects were delivered on time, within budget and all grant claims were successfully submitted.</p>	<ul style="list-style-type: none"> • Seafood in Schools is ongoing – 150 schools participating and 13,500 pupils involved. • Asia export market development programme completed • Business development supported through to project completion and an independent audit evidenced a minimum return on investment of 8:1 • Foodservice three learning journeys completed
<p>WORK PROGRAMME OVERALL KPI</p> <p>Year on year improvement in Stakeholder satisfaction from baseline established in Year 1 survey.</p>	<p>SHETLAND SEAFOOD LIAISON</p> <p>To maintain strategic relationships between Seafish and industry in Shetland. Liaise with a representative committee of stakeholders in Shetland to agree, develop and deliver a programme of projects to benefit the Shetland Isles seafood industry.</p>	<ul style="list-style-type: none"> • Eight RASS profiles plus supplementary information for three others developed • Improved practices and procedures developed going forward to the new market which will assist creating an improved profile. Requirements for training around some procedures have been identified. These are being / will be addressed in the next round of improvements.
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <ul style="list-style-type: none"> • Management of Inshore Fisheries project and Inshore Coordinator on behalf of Scottish Government • Delivery of agreed Seafood Scotland projects • Co-ordinated support for Shetland seafood industry. 	<p>INSHORE TECHNICAL PROJECT</p> <p>To manage the overall budget and maintain strategic oversight for the programme of the 8 sub-projects commissioned by Scottish Government to benefit the development of inshore fishery management plans.</p> <p>The projects commenced in July 2014 and ended between July and September 2015. They were funded by EFF grant. The overall programme completed in September 2015.</p> <p>All sub-projects are being undertaken by external contractors. Day to day project management and management of the project Facilitators is being undertaken by MASTS suppliers and buyers.</p>	<ul style="list-style-type: none"> • Seven of the eight pilot projects delivered on time and within budget. The eighth project met with contractor problems, a replacement contractor was appointed late on but it ensured that the project was still able to deliver valuable results. • Project reports submitted by the respective contractors to Scottish Government. • All financial claims submitted to Scottish Government and all payments made under the EFF scheme

Key Highlights

- Seafish Scotland was the main delivery resource for the SFS Business Development support programme. This EFF project was successfully completed in autumn of 2015 and a project evaluation indicated that approximately 120 businesses had been supported. From this support it was reported that the project contributed to over 50 new customers, 35 new products and new sales of £4.1 million. It also helped secure over 800 FTE jobs and assisted in the creation of over 30 full time and 30 part time jobs.
- A Scottish Seafood Training Network was planned, co-ordinated and formally launched for industry in May in line with similar training networks in other regions across the UK. The network has an associated membership of employers and training providers; establishing a network which can be grown going forward from its existing membership providing a network of approved training providers / apprenticeship providers to service all skill development needs for Scottish industry.
- Seafish Scotland successfully managed the delivery of eight projects supporting various research and data collection programmes for inshore fisheries in Scotland. The EFF supported research budget was £1.4 million. Several of these projects produced very successful results. As such some are likely to lead to further development and implementation when future funding is secured.

Testimonial

Seafish Scotland expertise provides input to the Marine Conservation Society Fishonline review group. This is an industry stakeholder group, facilitated by Seafish, which provides advisory input and insight regarding the scoring of consumer fish listings when under review/change. During the summer review in 2015, proposed changes to scores for a number of species with commercial importance to both Scotland and the UK were analysed by Seafish Scotland staff and a number of modifying proposals for several species were made. These were circulated to the advisory group, and MCS. Other group members from industry fully supported these comments and input. The addition of supporting testimony from Nigel Edwards at Seachill and Mike Berthet from M&J Seafoods added further weight to this input and helped to influence the revision of the MCS ratings review. It also reflected positively in that commercial interests fully endorsed Seafish expert opinion in regard to such fishery analysis.

“I cannot add anything to the comments that you have already received. We would fully endorse your comments especially concerning plaice, hake, and herring. The message to the public should be to firmly support more consumption of these species and not send a cautionary message. We hope that you share our confidence in the effectiveness of the management.”

Nigel Edwards, Seachill.





PROGRAMME

Seafish Wales

The overarching aim of Seafish Wales is to support sustainable development and growth in Wales

**WORK PROGRAMME
OVERALL KPI
(FROM CP) FOR 2015-16**

Year on year improvement in stakeholder satisfaction from baseline established in Year 1 survey.

**WORK PROGRAMME ANNUAL
TARGET FOR 2015-16**

- Co-ordinate delivery of Seafish Wales projects as agreed by the Seafish Wales Advisory Committee (SWAC).
- 10% increase in satisfaction score from baseline.

PROJECT

**FACILITATE SEAFISH WALES
ADVISORY COMMITTEE (SWAC)**

- Three SWAC meetings per year.
- SWAC meeting agenda and minutes produced and uploaded onto the Seafish Wales webpage.
- 20 days set aside for opportunities identified and agreed by SWAC.

PROJECTS ON BEHALF OF SWAC

- A report providing evidence of the socio-economic importance of the Welsh seafood industry.
- A Wales Seafood Strategy developed in close collaboration with Welsh seafood industry and the Welsh Administration via SWAC.
- Seafood education and training initiatives supported via the Seafood Training Network for Wales.

**COMMUNICATIONS AND
RELATIONSHIP MANAGEMENT**

Facilitate access to and improve awareness of central Seafish services and resources through regular meetings with stakeholders, regular Seafish Wales E-Update, up to date web pages, twitter activity, and press articles as required.

DELIVERY ON TARGETS 2015-2016

- Three SWAC meetings held 28/04/15, 13/10/15 and 13/01/16. Agenda, papers, and minutes published online.
- Seafish Wales Annual Plan 2016/2017 signed off by SWAC at 13/03/16 meeting.
- A 'Quick Guide' to food standards at public events for commercial fishermen has been published online June 2015 at request of SWAC.

- Socio-economic outputs include: a socio-economic impact assessment of cockle mortality in the Burry Inlet cockle fishery; a bespoke economic analysis of the Welsh fishing fleet; and a comprehensive appraisal of the seafood supply chain in Wales.
- A draft proposal for a holistic Wales Seafood Strategy has been endorsed by SWAC and will be taken forward in 2016/2017.
- The Seafood Training Network Wales (STNW) became a full Partner within the Seafood Training Academy. STNW activities and outputs include: two steering group meetings; a CPD event for college lecturers; two FLAG-funded seafood education projects; bilingual fish & shellfish apprenticeship leaflets; and five industry skills workshops.

- Seafish represented at key meetings: Wales Marine Fisheries Advisory Group meetings; Fisheries Management Board meetings; Inshore Fisheries Group meetings; Welsh Fisherman's Association Board meeting; FLAG Conference.
- Seafish events, workshops, and meetings with key stakeholders facilitated as required.
- Communication with stakeholders undertaken via regular meetings, Seafish Wales E-Update, new content and regular updates on Seafish Wales webpages, regular Twitter activity, and press releases.

Key Highlights

- A comprehensive appraisal of the current size, structure and activity of the seafood supply chain in Wales has been completed. This project included the collection of socio-economic data and the information gathered will help inform decision making with regard to future support for the sector and provide a baseline against which trends and changes in the sector can be monitored.
- A draft proposal for a Wales Seafood Strategy has been endorsed by SWAC and will be taken forward in 2016/2017. This Strategy outlines a holistic and integrated approach to supporting the sustainable growth of Welsh seafood industry.
- Five industry skills workshops, the first of their kind in Wales, have been successfully delivered in collaboration with the Seafood Training Network Wales and Food & Drink Wales Welsh Seafood Cluster. Very positive feedback was received from participants and there is a clear demand for further workshops.

Delivery of industry skills workshops, February 2016

A series of five specialist seafood skills workshops were delivered in Wales in collaboration with the Food & Drink Wales Welsh Seafood Cluster and the Seafood Training Network Wales. These workshops covered fish filleting and seafood smoking skills and were aimed at fishermen, processors, and fishmongers who want to upskill and learn how to add value to their product. The workshops stimulated a huge amount of interest amongst industry, with many courses fully booked within a few days. Demand in South Wales was so high that an additional one-day fish filleting workshop was organised. Every participant filled out a detailed feedback form and very positive feedback was received. There was also a great deal of interest in further workshops and training courses.

“The smoking course held at Food Centre Wales was fantastic. Both instructors were very knowledgeable and it has given me the confidence to develop smoking techniques as part of our hot food offer.”

Jonathan Williams, Founder of Pembrokeshire Beach Food Company.

“I just wanted to thank you and your team for the courses that I have attended recently at the food technology centre. The content and delivery of the courses were excellent, very much appreciated and of great value to myself and business.”

Kevin Rice, West Shore Beach Café.





PROGRAMME

Seafish South West England

The overarching aim of Seafish in the South West is to support the sustainable development and growth.

WORK PROGRAMME OVERALL KPI (FROM CP) FOR 2015-16

Year on year improvement in stakeholder satisfaction from baseline established in Year 1 survey.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

Co-ordinate the delivery of the Seafish South West Regional Strategy & facilitate an Advisory Committee of SW Stakeholders 10% increased sentiment.

PROJECT

- Facilitate Seafish SW Advisory Committee - Develop projects, manage and support regional strategic engagement.
- Economic Impact Models - Assess the impact of management advice on the SW Seafood supply chain
- SW Fishery Environmental Profiles - increase market opportunities through improved information on the credentials of SW fisheries.
- Promoting regional consumption - work with regional stakeholders to improve the profile of Seafood within the SW.

- Economic profiles delivered for industry highlighting key SW stocks by fishery.
- RASS profiles delivered for key SW fisheries.
- Testimonials from scientific partners, cost savings evaluated.
- Advice and enquiries logged using the Seafish database. Social media and articles recorded.

- Identify areas of opportunity for the SW seafood Sector enhancing profitability & market opportunities
- Develop & deliver regional work streams in line with the corporate plan as directed by the SW committee.
- Regular interactions with key contacts and advisory committee members.

DELIVERY ON TARGETS 2015-2016

- Third and Forth SSW Advisory meetings held in Sept 15 and March 16. Projects initiated, completed and reported on. 2016-17 annual plan signed off by the committee.
- Work carried out on Regional Impact models in conjunction with CFPO & SWFPO fleet segment information, findings reported.
- Worked with Responsible Sourcing colleagues to deliver the relevant SW profiles for RASS.
- Assisted in the distribution of over 900 PFDS to SW fishermen. PFD workshops run in 14 SW ports
- Managed a Seafish SW stands at the Dorset Seafood Festival and Fish Stock during 2015.

- Bespoke South West PO landings obligation economic analysis carried out.
- SW megrim completed and available on RASS.
- Testimonials submitted during the year and included in monthly reports.
- Enquiries logged totaling £39,600 for the year
- Media articles produced and twitter account well maintained.

- Facilitated an Advisory Committee to support Regional Strategy development,
- Co-ordinated the delivery of the Seafish South West Regional Strategy.
- Facilitated good communication and enhance Seafish engagement of key stakeholders in the South West.
- Improved Seafish visibility, providing expert advice and a regional point of contact

SW beam trawl gear development and liaison 2015-2016

Recent years have seen important changes in the management of marine resources, in which environmental, ecological and sustainability issues have become of increasing importance.

Customers are becoming increasingly aware of the need for sustainability and this has given rise to the MSC and other certification schemes. Beam trawl fisheries can have an effect on biodiversity, particularly when interacting with habitats and species that are sensitive to physical disturbance. There is also a need to understand better the dynamics of SW stocks and fisheries enabling improved sustainability.

The work undertaken by Seafish to improve fisheries knowledge through industry visits to the Dutch Pulse trawl fishery and the flume tank in Hirtshalls has resulted in the technical development of devices to reduce the impact of trawls on the Seabed resulting in reduced fuel consumption. This was taken further by Brixham trawl makers, working with Seafish gear technologists, in the design of an innovative Square Beam Trawl which encompasses all the innovative design ideas. The Square trawls are currently successfully being used by two vessels working commercially.

CAMPAIGN KPI	ACHIEVED
<ul style="list-style-type: none"> Improvement in fishermen's knowledge 	The Flume tank in Hirtshal's provided the resources required to assist the development of selective fishing gears.
<ul style="list-style-type: none"> Exchange of innovative ideas between EU fisheries 	A key element of the work undertaken and partnership with other similar international fisheries. Industry visits organised by Seafish enhances collaboration between fishers and improves dialogue.
<ul style="list-style-type: none"> Development of innovative selective fishing gears & improving fisheries science 	The aim of gear technology work is to create an operational environment where all available information and expertise is focussed on improving fisher's knowledge. This work has assisted in minimising the environmental effects of beam trawling, whilst maximising the fishing opportunities and sustainability.
<ul style="list-style-type: none"> Improving the perceptions of the SW beam trawl industry 	Initiatives undertaken by Seafish have provided the basis for describing to retail customers the operating practices and standards in relation to fisheries impacts & environmental management





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2015-2016
<p>Seafish Northern Ireland</p> <p>The overarching aim of Seafish Northern Ireland is to support sustainable development and growth in Northern Ireland</p>	<p>FACILITATE SEAFISH NORTHERN IRELAND ADVISORY COMMITTEE</p>	<ul style="list-style-type: none"> • Three meetings held during 2016/16 and minutes published online. • Seafish NI Annual Plan 2016/2017 signed off by SNIAC at March 2016 meeting. • SNIAC events, projects and workshop arranged and facilitated as required eg NI Seafood Week event.
<p>WORK PROGRAMME OVERALL KPI</p> <p>Year on year improvement in stakeholder satisfaction survey from baseline survey.</p>	<p>INDUSTRY RELATIONS, COMMUNICATIONS AND ADVICE</p> <p>Writing articles for trade press and media as well as Seafish NI regional web pages and the Seafish website; producing monthly newsletter; maintaining @SeafishLynn twitter account; circulating key Seafish news stories to NI industry; Seafood industry film.</p>	<ul style="list-style-type: none"> • Communication with stakeholders via regular meetings, monthly articles produced for Irish Skipper, monthly Seafish NI newsletters, regular media stories and @SeafishLynn Twitter account. • Effective dissemination of Seafish NI industry films (over 25,000 views in year one) and reports via upgraded Seafish NI webpages. • Represented Seafish at key NI Steering groups. • Dealt with 112 industry enquiries.
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <ul style="list-style-type: none"> • Delivery of agreed Seafish Northern Ireland projects • Regional support for Northern Irish industry 	<p>PROJECTS ON BEHALF OF SNIAC</p> <p>NI projects included work on Fishermen's Safety (PFDs), seafood promotion, velvet crab sustainability and marine conservation zones.</p> <p>Other opportunities identified during the year were actioned including a Responsible Sourcing Workshop in NI, media training for industry and an NI Seafood week event, an EFF funded MSC pre-assessment of Strangford Lough pot fisheries.</p>	<ul style="list-style-type: none"> • Completed distribution of 1340 PFDs to sea fishers and 500 PFDs to inland fishermen/aquaculture workers and provided safety training. • Seafish NI stand at Balmoral 2016. • Produced 21 NI Seafood industry case studies. • Development of Seafood Training Network NI including Fish filleting courses in Kilkeel. • Facilitated Fleet-to-Fork event, Kilkeel with South West College and Sea For Yourself film. • Report on velvet crab sustainability published. • Report on Alternative Marine Conservation Zones published. • Managed an EFF-funded project to carry out an MSC pre-assessment on Strangford Lough pot fisheries.

Key Highlights

- 21 seafood industry case studies have now been completed, circulated to stakeholders in hard copy and uploaded to Seafish website. These, along with the seafood industry films, have been extremely useful. Content from the case studies and films is being used by Tourism Northern Ireland and Food NI to celebrate the local seafood industry in this, the Northern Ireland Year of Food 2016.
- A project with industry, DARD, AFBI and Poseidon to identify alternative Marine Conservation Zones in the Irish Sea has been completed. This work will be important in progressing mutual opportunities for the fishing industry and the environment when the tranche three consultation on MCZs opens in 2017.
- An event to celebrate Seafood Week in Northern Ireland, The Big College Seafood Cook-Off, was a great success with students from all the catering colleges in NI, under the mentorship of local celebrity chefs, producing a seafood banquet for a wide range of key stakeholders.

“That was a wonderful day, so pleased to have been involved. Congratulations on bringing that all together with such panache.”

Christine Irwin (Belfast Met)

“Just a quick e-mail to congratulate you for a brilliant event yesterday it was really enjoyable and thank you for the invitation.”

Alistair Higgins (InvestNI)

The Big College Seafood Cook-Off

This event was developed in NI to support Seafood Week. It involved students drawn from all the catering colleges in Northern Ireland teaming up with local celebrity chefs to cook a range of local, sustainably-sourced seafood. The dishes produced were served to a group of key stakeholders drawn from industry, Government, media and other key partner organisations. The event promoted local seafood, celebrated and advertised Seafood Week in NI and helped position Seafish and the seafood industry as key partners in the local food scene in the NI Year of Food 2016. This event directly led to a Radio Ulster programme (The Foodie) on seafood and led to Tourism NI and FoodNI using Seafish NI materials on their websites and TV channels. The event secured a total print and online reach of over 600,000 people and lots of positive feedback from participants through PR and a short film of the event.

“I wanted to record just what an uplifting and thoroughly enjoyable initiative this was, and superbly organised. Attendance by an impressive range of fishery and seafood interests added significantly to the occasion. Everyone deserves much credit and all served as excellent ambassadors for Seafish.”

Dr John Speers, Head of Fisheries and the Environment, DARD

“Thank you for the wonderful day the students and I had. I hope we can continue to do this every year as they got so much out of it.”

Michael Gillies, South East Regional College





PROGRAMME

Enhance Reputation: Seafish Campaigns

Our campaigns programme aims to build on the work carried out by Seafish in the previous corporate plan, enhancing the reputation of the industry.

WORK PROGRAMME OVERALL KPI

85% positive/balanced media coverage towards industry.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- 85% positive/balanced media coverage towards industry.

PROJECT

MULTI CHANNEL CAMPAIGNS

Focusing on areas of strategic importance to industry including:

- Responsible Sourcing
- Ethics
- Recruitment & Training
- Labelling

SEA YOU HOME SAFE

Continuing our award winning campaign encouraging more fishermen to wear PFDs in order to showcase a responsible industry.

INSIGHT

Using Seafish expertise to deliver insight on key topics driven by industry views:

- Experts programme using platforms such as media, e-newsletters, blogs and events
- Package information into regular reports on topics led by Insight team.

REACTIVE COMMUNICATION

An ongoing programme of support for industry on key reputation issues. Providing co-ordinated responses and insight, often at short notice.

DELIVERY ON TARGETS 2015-2016

Overall, the positive/balanced media sentiment score was 95%. In total, we secured 2,753 pieces of coverage in print, broadcast and online media, with a reach of 238.5m.

Worked closely with the Responsible Sourcing team to launch the Gear Database and RFS, including a successful RFS launch event at Westminster.

Developed 'The World Is Your Oyster', a recruitment campaign to attract young people in to the seafood industry with a focus on apprenticeships available.

Ran an integrated campaign at the end of May. Earned 22 pieces of national and regional coverage with a reach of 7.2m. The film of Dougie's story, whose life was saved by wearing a PFD, has been viewed 2,380 times.

Worked with Insight team to deliver 3 industry reports including the annual Seafood Industry Factsheet.

Consistently provided media with market/economic data to support consumption and industry stories including fleet economic performance and Christmas retail sales, which secured coverage in the Daily Mail and the Grocer.

We provided briefings and responses to national media on a range of industry stories including North Sea Cod stock levels, the Greenpeace campaign on Arctic Fishing and a BBC documentary on slavery which featured the UK fishing industry.

The World Is Your Oyster

The future of the seafood industry is dependent on attracting new people in to the industry and equipping them with the skills and knowledge required.

We developed 'The World Is Your Oyster' recruitment campaign to promote careers in the seafood industry and highlight the variety of courses and apprenticeships available from fishing to fishmongering and fish frying.

Initially aimed at young people, the campaign messages focused on the unique benefits of working in the seafood industry such as the opportunity to travel and run a business at a young age.

'The World Is Your Oyster' started out as a digital campaign using real life case studies to tell a very personal story about a career in the seafood industry. A film and digital assets including an infographic were produced for promotion on the Seafish digital channels and also made available for industry to use on their own platforms.

Since the launch, we have secured 36 pieces of print and online coverage in regional and trade media including key careers publications. It has increased visits to the Careers and Training section of the Seafish website by 76%.

The biggest success has been the film featuring our case studies with over 1,000 views and high praise from the industry.

"Last Thursday I attended a Maritime Skills Alliance board... At the meeting I presented the excellent work you have been doing on careers and played the video, which received a round of applause, lots of positive comments and stimulated a good debate about careers promotion in the maritime sector."

Simon Potten, Head of Safety and Training, Seafish

Other Highlights and Results

- The Seafish website has grown with 147,000 unique users and more than half a million page views across the year.
- On Twitter, we have achieved 21.8million impressions and gained 2,819 new followers.
- The number of people using the Seafish Asset Bank to access photography and films has grown from 120 to 515. The value of the assets downloaded by external users was £152,250.
- The Communications and Marketing team won the prestigious 'In House PR Team of the Year' at the CIPR PRide Scotland awards in October 2015.





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2015-2016
<p>Enhance Reputation: Industry Support</p> <p>This programme is designed to improve the links and transfer of information between industry and Seafish to enhance the overall reputation of the industry.</p>	<p>E-MEDIA ACADEMY</p> <p>Media training and support for industry. The aim of the bespoke online platform is to act as a media resource for Seafish staff and industry spokespeople featuring key messages, talking heads and live media opportunities on a range of topics including:</p> <ul style="list-style-type: none"> • Ethics • Landing Obligation • Responsible Sourcing • Seafish levy 	<p>Content for our e-media academy was compiled over the year, with insight pieces on a number of key topics. This work will be used to support industry in managing reputation issues.</p> <p>Our on-going media training programme helps industry partners to better manage their own media opportunities. This year, we media trained the 10 finalists of the Independent Takeaway ahead of the final of the National Fish & Chip Awards to ensure they were prepared for their press opportunities.</p> <p>Overall, the positive/balanced media sentiment score was 95%.</p>
<p>WORK PROGRAMME OVERALL KPI</p> <p>85% positive/balanced media coverage towards industry.</p>	<p>INDUSTRY RESPONSE GROUPS</p> <p>Pooling industry expertise to help support industry communications. Facilitated by Seafish, the response groups are made up of industry communication professionals to discuss joined up responses and approaches to reputational media risks and opportunities.</p>	<p>No single formal group was established, however, Seafish brought together key stakeholders to agree messaging on a number of hot topics. Moving forward, this work will be formalised.</p>
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <p>85% positive/balanced media coverage towards industry.</p>	<p>EVENTS</p> <p>A programme of engagements events forming an integral part of the full Enhance Reputation programme and supporting a range of Seafish projects.</p>	<p>Seafish hosted the World Seafood Congress in Grimsby in September 2015, with an international mix of attendees. A full media engagement programme took place across the year to maximise opportunities for Seafish.</p> <p>We also ran the 2015-2018 Corporate Plan Roadshow, a series of seven regional events across the UK to speak directly to stakeholders about our plans.</p>

World Seafood Congress

The World Seafood Congress brings together a global audience of seafood processors and importers, public and private organisations, academia and government. Seafish hosted the event in Grimsby from 5th to 9th September 2015.

An event of this size and calibre in Grimsby required a mix of key components to ensure success: an international delegation; an inspiring keynote speaker; big name sponsors; a suitable venue with quality facilities; and a communication and marketing plan which engaged media and attendees. Working with the English Account Manager, we pulled in eight sponsors to help fund the event, including Young's, Icelandic Seachill, MGS and Asda, and worked with four regional and trade media partners to publicise the Congress to our key audiences.

The communication and marketing strategy started a year before the event to ensure branding materials and a website were in place in good time to maximise opportunities. We engaged with media to ensure key announcements were highlighted as well as full coverage during the event itself.

In total, we secured 271 pieces of print, broadcast and online coverage with a reach of 35million.

The event itself was a huge success with excellent feedback from stakeholders across the board and an extremely inspiring and uplifting keynote speech by special guest, Sir Ranulph Fiennes.

“Successful events such as this cannot happen without a great deal of hard work and expertise. This has been proved in abundance by your staff. Again many thanks”

George Krawiec, Chair - Seafood Grimsby and Humber

“Huge thanks for an amazing event.

Nigel Edwards – Icelandic Seachill

Other Highlights and Results

- Alongside the Market Insight team, we ran a successful Business Breakfast in conjunction with The Caterer to reveal our Food Service research.
- Our suite of Corporate Plan materials were designed to improve industry engagement and included a bespoke microsite which has had 2,000 users and 10,000 pages views over the year. A supporting film was also produced and shown at the Corporate Plan Roadshow events.





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2015-2016
<p>Responsible Fishing Scheme (RFS)</p> <p>The updated RFS scheme provides the onshore supply chain with the ability to make informed decisions in respect of their responsible sourcing strategies.</p>	<p>RFS MANAGEMENT</p> <p>Catching sector engagement to encourage vessels, existing RFS members and non-members to become certified against the revised scheme standards. Completion of the new scheme's suite of support materials. Oversight of Certification Body (CB) performance indicators.</p>	<p>New RFS Policies and Procedures fully documented and the dedicated RFS website launched April 2015.</p> <p>The pilots took longer than expected so certified vessel numbers remain low at <20 certified, with a further 130 in application.</p> <p>Version two of the support materials incorporating feedback from the pilots now on the website, ensuring the scheme is more accessible across the UK fleet during roll out in 2016.</p> <p>Certification process approved in September, with Key Performance Indicators agreed with the CB and a total of 22 auditors now in training, ensuring auditor capacity throughout the Scotland, England, Northern Ireland and Wales.</p>
<p>WORK PROGRAMME OVERALL KPI</p> <p>1,000 vessels certified to the scheme by end-March 2018.</p>	<p>RFS DEVELOPMENT</p> <p>Attainment of ISO accreditation. Launch of the RFS Chain of Custody standard. Alignment to advice and information generated by the Seafood Integrity programme.</p>	<p>Accreditation is a longer process than anticipated; feedback from UKAS has been incorporated into the scheme and all activities remain to be managed in an "ISO ready" state. With agreement the Chain of Custody development work has been delayed so the team could focus on relaunch of the vessel standard in the UK.</p>
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <p>200 vessels certified to the new scheme.</p> <p>Additional 200 engaged with the scheme working towards certification.</p>	<p>RFS OUTREACH</p> <p>Promotion of the scheme to the UK supply chain, the domestic and relevant foreign catching sectors, relevant industry decision makers and the media.</p>	<p>RFS re-launched to the UK industry in January at Westminster; regional events followed in February and March. The Scheme is receiving widespread endorsement and support both throughout the UK and internationally. RFS has already been incorporated into the sourcing policies of Direct Seafoods, Morrisons, Waitrose and M&S with many others committed to encouraging engagement across the fleet.</p>
	<p>RFS IMPROVER PROGRAMME</p> <p>Development of a guidance framework to support fisheries in developing countries in addressing key safety and ethical issues, allied to the main RFS programme.</p>	<p>VIP guidance framework is in final draft and ready to be tested. Some external funding for a pilot VIP in Vietnam has been secured and a potential second VIP identified that will be facilitated by a UK retailer and NGO in SE Asia.</p>

UK Roll Out of the new Responsible Fishing Scheme

- Work on the UK pilots commenced in March 2015 and in August we saw our first three new members certified against the new RFS Standard. Once the SWFPA knew the new RFS was “open for business” they confirmed that they would cover audit costs for any of their 130+ members who wish to become certified to the Scheme. Within weeks of this announcement the number of applications tripled and there is hope that this, coupled with commitments from leading UK retail and food service businesses that they will be looking for RFS certification as a condition of supply by the end of 2017, will encourage a large number of the vessels within this sector to become engaged with the new Scheme.
- It is clear that a locally led network of support needs to be established to support skippers across all fleet sectors and the part that POs, Fleet Managers and members of the Supply Chain can play in this is yet to be determined. The RFS One-Day Support Course that will be piloted throughout the UK from May onwards will be our next step in facilitating informed discussions across the UK seafood industry to facilitate the evolution of locally led support, which will complement centrally developed Seafish support materials to ensure the new RFS is accessible to all skippers in the UK fleet who wish to join.

“It is important that skippers are able to demonstrate that as well as taking a responsible attitude to the environment and sustainable fishing, they adhere to best practice when it comes to crew and conditions on board, and the RFS enables them to do that.”

Anne-Margaret Anderson,
SWFPA inshore and environmental policy co-ordinator

The UK industry at the forefront of developing solutions

- The global seafood industry is associated with a number of issues around social responsibility (ethics), and there is a particular lack of visibility within the catching sector, making it uniquely challenging to understand, manage and resolve the situation at sea. The RFS is the only standard to apply social criteria to vessels and is seen by industry and leading ENGOs alike as part of the solution.
- The UK industry is widely recognised as being ahead of the curve in tackling these challenges, having had the foresight to redevelop RFS in 2014. Over the last year fellow standard holders, ENGOs and policy makers alike have invited the RFS team to present at events to increase the global industry’s understanding of how RFS can help protect the seafood industry’s reputation: firstly, by providing a mechanism for those fleets already operating in line with industry-recognised best practice; and through the RFS Vessel Improver Programme, by enabling those fleets with more serious reputational issues to demonstrate their commitment to introducing best practise over a slightly longer time period.

I look forward to working with Seafish in the future on RFS roll-out into the UK fleet and also in looking at ways that the RFS Vessel Improver Programme can be deployed into non-UK supply chains.”

Mike Mitchell, Technical & CSR Adviser to Young’s Seafood Ltd.





PROGRAMME

Advocacy

Our Advocacy programme supports our communications work and helps foster a network of champions to promote the industry.

WORK PROGRAMME OVERALL KPI

Year on year improvement in stakeholder satisfaction score from baseline established in year one survey.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- RFS – 4 retailers and 2 food service companies publically committed, two standard older publically endorsing.
- RASS – two retailers and one food service company publically committed.
- Issues Groups – 15 new members and Ethics and CLG promotions at 3 international events.

PROJECT

The Advocacy programme is built around the outputs of our workstreams and Head of Advocacy works directly with Teams to support delivery of their objectives and outcomes. Key projects are identified and specific plans are developed to ensure maximum stakeholder engagement. Regular contact is maintained with the relevant project teams, and plans fine-tuned to meet developing needs of the project. RFS, RASS, FITD and the Issues Groups are current key tools in the process.

DELIVERY ON TARGETS 2015-2016

- Four retailers, one food service company and 13 major seafood processors issued the following statement in 2016, "We have committed to incorporating the Responsible Fishing Scheme certification into our sourcing policies"
- RASS – the establishment of a collaborative project to develop an Ethics Risk Tool, which will be a part of RASS, became the main focus in 2015/16, with the Head of Advocacy involved in the development of this project and its promotion at global events. Waitrose and Direct Seafoods have committed to using RASS.
- The Issues Groups, RFS and RASS were promoted in talks given by the Head of Advocacy at eight international events
- Identified 15 new members for the SECLG including the ILO, USAID and other international experts, broadening the outreach of the group.
- Speaking internationally enabled networking and the identification of topics and speakers for Issues Group meetings.
- Monthly Engagement with 86 MPs with seafood & fishing related interests, including members of the All-Party Parliamentary Fisheries Group, highlighting Seafish services, projects and industry expertise.
- A schools event was held in the South West taking key messages of Seafood Week to primary school children.

Promotions of Seafood Ethics Common Language Group and Common language Group at international events

On the back of growing global media attention into alleged human rights abuses in seafood supply chains, including those supplying the UK market, interest in the Seafish Responsible Fishing Scheme (RFS) has risen significantly. As the only global standard to audit compliance on-board fishing vessels, including social and ethical issues, RFS is seen as one of the few tools to address these issues. As a result, and through presentations at conferences in 2014/15, the Head of Advocacy was invited to speak at 8 international events in 2015/16. These included conferences hosted by UNDP, Oxfam, the International Coldwater Prawn Forum, Baltic Advisory Council, the World Seafood Congress and an ILO international expert meeting on labour exploitation in the fishing sector.

At each event, the presentation, which encompassed all of Seafish's work in seafood ethics, including RFS, RASS and the SECLG, was well received. The presentation and subsequent Q&A sessions at each event provided a seafood industry audience with new knowledge to help them understand and tackle the issue in their supply chains, or informed other relevant stakeholders (government agencies, UN, NGOs) about the steps being taken by the UK seafood sector. As a consequence industry interest in RFS, RASS and SECLG has grown, whilst Seafish's relationship with other experts in the field of human rights and labour issues has developed, ensuring policy makers recognise the projects and initiatives being undertaken by industry.

A new network of global contacts has now been established and through them Seafish is able to continue to share best practice and in return use their expertise to enhance the programmes delivered to both SECLG and the CLG. For example, these contacts were used to enhance the programme of speakers at the Seafood Ethics Workshop run at the Seafood Summit in Malta in February 2016.

"I'm glad that you won some of the sceptics over with your good, clear presentation."

Sally Clink, Secretariat, Baltic Sea AC

"On behalf of the ICWPF I hereby thank you for a splendid and highly interesting presentation at ICWPF. Your presentation gave the delegates new knowledge and important information."

Jens Henrik Møller, ICWPF Secretariat

The output of the ILO Expert Meeting is the publication of a report later this year, which includes a case study on RFS as a market-led tool to address labour exploitation. Similarly a joint report has been published by SFP/UN/Oxfam "Seafood & Social Development" featuring the RFS VIP.





PROGRAMME

Safety & Training: Fishing Safety

This programme aims to raise safety awareness and promote safer working practices in the most dangerous part of the seafood industry in pursuit of our goal of a year in which no fishermen die.

WORK PROGRAMME OVERALL KPI

Zero deaths attributed to poor working practices over a 12 month period.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- Delivery of 6 safety roadshows
- Delivery of 1,500 PFDs to fishermen
- Attend 2 FISG meetings and support one new FISG safety initiative
- Support MAIB investigations

PROJECT

SAFETY ROADSHOWS

In conjunction with Regional teams and Fishing Industry Safety Group (FISG) partners, plan, organise and deliver six fishing safety events at ports around the UK.

PERSONAL FLOTATION DEVICES (PFDs)

Complete the ongoing EFF-funded project to distribute free PFDs to fishermen in England.

FISHING INDUSTRY SAFETY GROUP (FISG)

Attend and contribute to FISG meetings and safety initiatives.

MARINE ACCIDENT INVESTIGATION BRANCH (MAIB)

Contribute to MAIB accident investigations and respond to any recommendations arising.

DELIVERY ON TARGETS 2015-2016

This project was scaled back and budgeted levy spend was moved to Fishermen's Training Delivery (to help bridge the gap between EFF and EMFF). We did, however, attend the Fishing Exhibitions in Aberdeen (in May 2015) and Bournemouth (in October 2015) to promote key safety messages.

Our EFF-funded project ended on 31 December 2015. At that point we had purchased 4,500 PFDs and, in collaboration with organisations including the RNLI, we had handed out 3,350 to fishermen. We have continued (and are continuing) to roll out delivery of the remaining PFDs.

We attended two FISG Executive Board meetings, organised three meetings of the FISG Fishermen's Training project group and attended six meetings of the Promotions of Safety, Vessel Standards & Safety and PFD project groups. We partnered the RNLI on a new FISG safety initiative aimed at improving the safety of fishermen operating deck machinery. This resulted in an authoritative research report published by the Health & Safety Laboratory and an awareness-raising video.

During the year we participated in three MAIB meetings to review its findings from fishing vessel accident investigations and discuss appropriate recommendations that could help prevent such accidents recurring. The MAIB published seven fishing vessel accident reports during the year. These included four recommendations for Seafish action on:

- Lone - and single-handed fishing operations.
- Manoverboard recovery.
- Onboard drills.
- The placement of ventilation ducts in, or adjacent to, the bulwarks.

Fishing Industry Safety Group (FISG)

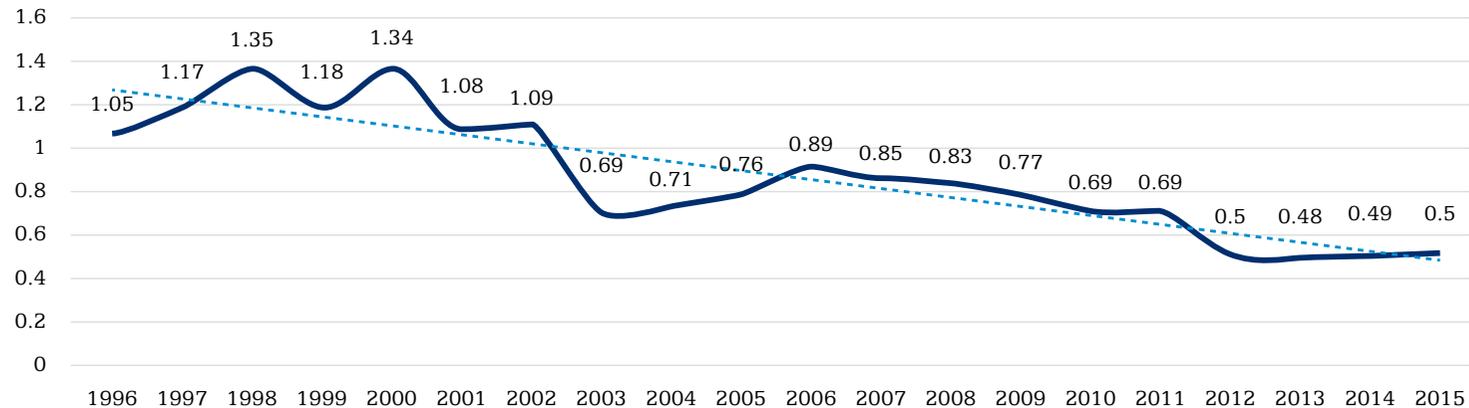
As members of the FISG Executive Board we work alongside the Maritime & Coastguard Agency, Scottish Fishermen's Federation, National Federation of Fishermen's Organisations, Welsh Fishermen's Association, Northern Ireland Fishermen's Federation and Shipbuilders & Shiprepairers Association to consider all aspects of fishing safety and agree concerted actions to reduce the number of deaths.

Findings from Marine Accident Investigation Branch (MAIB) investigations help us understand how and why accidents have happened and identify what can be done to prevent such accidents happening again. In delivering our actions we are grateful for the support of the Royal National Lifeboat Institution and the Fishermen's Mission (amongst others).

Since the 1990s there have been major improvements in fishing safety. Deaths per thousand fishermen have dropped by 53%, but the rate of improvement is too slow; too many fishermen will lose their lives before we can hope to achieve our goal of a year in which no fishermen die.

The FISG initiative to encourage every fisherman to wear a Personal Flotation Device (PFD) when working at sea on open decks has undoubtedly saved lives, but not enough fishermen are wearing them and falling overboard remains the biggest cause of death. More must be done to keep fishermen onboard and prevent them falling overboard in the first place.

3 Year Rolling Average Deaths of Fishermen (per thousand)





PROGRAMME

Safety & Training: Fishermen's Training

Our programme of Fishermen's Training aims to go beyond our statutory function of encouraging all fishermen to complete Seafish basic training by providing them with ready access to the skills and knowledge they need to work safely.

WORK PROGRAMME OVERALL KPI

Provide 24,000 training places on mandatory and voluntary training courses for fishermen.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- 8,000 training places on safety courses for fishermen
- Seek and secure £1m external funding to subsidise the cost of voluntary training to fishermen

PROJECT

QUALITY ASSURANCE

To undertake audits of all Seafish Approved Training Providers (ATPs) against our new standards and arrange expert observations of Seafish Approved Instructors.

FISHERMEN'S TRAINING ADMINISTRATION

Provision of administrative support for instructors and ATPs, record-keeping, research into digital systems and provision of advice and guidance to stakeholders.

FISHERMEN'S TRAINING DEVELOPMENT

Training advisory groups and meetings, development of training delivery infrastructure and development of new and existing courses and e-learning materials.

FISHERMEN'S TRAINING DELIVERY

Seek and secure external funding (including EMFF and MCA) and administer via ATPs to subsidise cost of fishermen's training.

DELIVERY ON TARGETS 2015-2016

- New QA system and supporting documents issued to all ATPs and uploaded onto our e-learning website.
- Eligibility criteria for instructor approval updated.
- 12 ATPs re-audited; one new ATP approved in SE England.
- 17 ATP instructor observation reports received.

- We responded to 548 training enquiries from fishermen and 104 enquiries from MCA checking fishermen's compliance with safety training requirements.
- We issued 256 safety training photo-ID cards to fishermen and 334 voluntary Under 16.5m Skipper's Certificates.
- Research into digital systems delayed.

- Stability Awareness course revised – 3 new courses developed: basic for new entrants, intermediate for experienced crew and advanced for skippers.
- Commenced work on development of a new Sea Fishing Trailblazer Apprenticeship with industry support.
- We secured grant funding from Seafarers UK to re-develop seafishonlinetraining.co.uk

- 7,075 taught and online training places were taken up by fishermen.
- Owing to the delayed implementation of EMFF we only managed to bring in £439k external funding to subsidise the cost of additional voluntary training to fishermen.
- To bridge the gap between EFF and EMFF our Board approved the use of levy to lever funding from the MCA.
- We submitted an application to Marine Scotland for two year's EMFF funding to support fishermen's training, but as this year's plan concluded, we had been unable to apply to the other Administrations.

New Entrants

In response to the shortage of crew available to work on UK - registered fishing vessels we have been actively supporting the recruitment and training of new entrants. This year we launched a new careers campaign and have continued to support the delivery of new entrant training. Thanks to EFF funding from the UK Fisheries Administrations our network of Approved Training Providers was able to deliver 23 Introduction to Commercial Fishing courses and train 207 new entrants. This brings to 772 the total number of new entrants trained since 2011. In addition, we continue to support the Sea Fishing Apprenticeship. Two centres in Scotland (Peterhead and Shetland) are now offering the Apprenticeship, along with the established centre in England (Whitby). This year 17 Apprentices qualified and 30 are ongoing. We have been working on a new Trailblazer Apprenticeship standard and raising awareness of the Apprenticeship Levy.

“The commitment and support from Seafish’s training team has been exceptional. As chair of the UK Fishermen’s Training Group I have seen firsthand the work that goes into the development and revision of courses. SFF has a debt of thanks to the team and we value their support as we try to attract new entrants into the industry. The next 18 months will see some big changes with the likely implementation STCW-F.”

Derek Cardno, Safety & Training Officer at the Scottish Fishermen’s Federation and Chair of the Fishing Industry Safety Group’s training committee.

Stability Awareness

Flooding, foundering and capsizing continue to be major causes of accidents to fishing vessels, despite our efforts to raise fishermen’s awareness of fishing vessel stability through our voluntary 1-day Stability Awareness course. To-date more than 5,800 fishermen have completed this course. During the year we reviewed our course and developed three new courses, which will provide fishermen with enhanced knowledge and understanding of stability, enabling them to take practical steps to assess and ensure the stability of their fishing vessels.

“The recent work Seafish has taken forwards with various industry representatives on re-developing the stability course has ensured that the new courses reflect the importance of the topic and its vital role in relation to fishermen’s safety. A new approach to the courses will ensure that the risks associated with stability are covered in each of the categories - new entrant fishermen, experienced crew and skippers - and will help to convey a more consistent message. As a former fisherman and experienced instructor I am sure that the revised training material and instructor guidance will help instructors deliver an interesting and worthwhile course.”

Lachie Paterson, Training Manager & Chief Safety Instructor at the Fish Industry Training Association (Highlands & Islands).





PROGRAMME

Safety & Training: Onshore Training

Our Onshore Training activities aim to raise workforce skills and knowledge, improve the take up of training programmes and qualifications up to management level.

WORK PROGRAMME OVERALL KPI

Take up of 3,000 onshore training places.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- Take up of 1,000 onshore training places

PROJECT

ONSHORE TRAINING ADMINISTRATION

Provide administrative support for training providers.

SEAFOOD TRAINING ACADEMY

Working with partners in the Seafood Training Academy to provide guidance, support and access to learning opportunities.

FISH AND SHELLFISH APPRENTICESHIPS

Supporting Seafish-recognised fish and shellfish apprenticeship providers throughout the UK.

DELIVERY ON TARGETS 2015-2016

We exceeded our KPI of 1,000 awards by 20%. Seafish-approved trainers delivered 1,198 awards in subjects including fish frying, seafood smoking, food safety, quality assessment and fishmongering.

Of note during 2015/16 was the delivery of two advanced quality assessment courses for BIM in Eire, the launch of fish smoking courses in Grimsby, and the relaunch of a level 3 food hygiene e-Learning programme.

The Seafood Training Academy partnership grew in 2015 as we welcomed the Seafood Training Network for Wales as an Academy partner. The Seafood Training Networks became operational in 2015/16 as training courses were delivered via the networks in Wales and Northern Ireland, and the Scottish Network launched its own newsletter. Approval of a fish and shellfish training centre in Scotland has been delayed, but is expected later in 2016.

The website seafoodacademy.org continues to be a significant source of information on training and provides opportunities for learning.

Fish and shellfish apprenticeships continue to grow in popularity across the UK, and are supported by 14 Seafish recognised apprenticeship providers now that we have a provider for North Wales in place.

The 566 apprentices who completed their programmes in 2015 (Jan to Dec) exceeded expectations by almost 13%. This represents a very significant investment in our industry via apprenticeship funding. Working closely with employers and Improve, we have developed and submitted a new Trailblazer Apprenticeship Standard for fishmongering.

Pembrokeshire Scallops Ltd

A routine enquiry from a shellfish business in Wales during late 2015 asked for information and guidance on staff training resources and opportunities that could lead to an expansion in the business.

We responded with information and guidance on Hazard Analysis and Critical Control Point (HACCP) planning, information on biotoxin mitigation/reduction, links to online training videos available through the Seafish YouTube channel, plus a free company training manual in scallop handling and shucking practices.

Further communication with the business led to their participation in training courses piloted by the Seafood Training Network for Wales and we are currently looking into the availability of apprenticeship funding for managers in Wales following a request from this business.

Neil Walters, Partner at Pembrokeshire Scallops recently responded to our request for feedback with these comments:

- **Value for money of the training :** Excellent
- **What can you do now?** I can fillet fish, I couldn't before
- **How have we been able to support you?**
Seafish has been amazing for us. When we entered the scallop industry, information was thin on the ground until we came across them. Now we have a proper HACCP plan, as much information as we need and they are helping us with funded training to take the whole enterprise to the next level. I can't thank you enough.





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2015-2016
<p>Seafood Integrity</p> <p>This work programme provides information and advice on a range of seafood integrity issues.</p>	<p>PRODUCT INTEGRITY</p> <p>To provide information and guidance on product related issues in the supply chain (e.g. adulteration, substitution, mislabelling).</p>	<p>We commissioned the production of a series of guides on different integrity issues, starting with glaze, added water and species substitution.</p>
	<p>SOCIAL RESPONSIBILITY (ETHICS)</p> <p>To provide information and guidance on ethical issues in the supply chain. This will also provide input to RASS and RFS (within Responsible Sourcing).</p>	<p>We produced three briefing guides on different issues and completed a detailed review of ethical issues in the UK seafood supply chain. The outputs of this detailed review have helped inform the scoping phase of the social component of RASS.</p> <p>We have also held two workshops; one in the UK to provide practical advice for business who have to report for the purposes of the Modern Slavery Act, plus an international workshop 'social responsibility in seafood' in Malta.</p> <p>Ethics in seafood webpages have been produced and are regularly updated to ensure the information we have available is as topical and relevant as possible.</p>
	<p>ANIMAL WELFARE</p> <p>To provide information and guidance on animal welfare issues in the supply chain.</p>	<p>We delivered a briefing note that summarises the positions of the main stakeholders (academia, catching sector, NGOs, legislators), in context of their respective position regarding the issue of fish pain/sentience.</p> <p>We commissioned a study investigating the reporting of fish pain and sentience through various media formats.</p> <p>The contents of this briefing note and the finding of the media investigation have helped inform the scoping of next year's work.</p>
<p>WORK PROGRAMME OVERALL KPI</p> <p>Social / ethical risk factors developed and populated on RASS</p>		
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <ul style="list-style-type: none"> • Scoping ethics part of second phase development of RASS completed • Information required for RASS is available • Integrity section on website 		

Social responsibility (ethics)

Our overall work on ethics spans a number of teams in Seafish; this collaborative approach enables us to deliver a range of different activities to help the supply chain move forward on this issue. This project area specifically covers the development of information and advice to facilitate common understanding in the supply chain.

In 2015, we commissioned a study to assess the ethical issues impacting on seafood species landed into and imported to the UK. This provided a comprehensive overview of the ethical concerns pervading seafood production and processing activities in a wide range of countries that supply the UK seafood market, as well as domestic landings. The project outputs included a detailed literature review, fifteen risk mapping regional profiles highlighting countries to watch, and an analytical report with strategic recommendations. The outputs have been used by businesses to understand the risk landscape. The information generated has also been used to help in scoping the development of the social component of the Seafish Risk Assessment for Sourcing Seafood (RASS).

In January 2016, the Seafish team held a 'social responsibility in seafood' workshop in Malta, at the SeaWeb Seafood Summit. Attended by 100 stakeholders, it was a huge success in terms of explaining the issues and different tools and initiatives. The audience of international attendees welcomed the chance to hear from the 19 speakers about the issues and initiatives that are helping to address issues in the seafood supply chain.

"I am so proud that Seafish have embraced this as an issue, placing UK seafood at the forefront of world thought-leadership at a time when many stakeholders are either looking for solutions or are even in a state of denial. Well done to the Seafish team for delivering an excellent agenda with such a broad diversity of stakeholders - it was quite some feat to pull that off, but you did it and you did it well."

Mike Mitchell, Technical & CSR Adviser to Young's Seafood Ltd.

To help the seafood industry better understand the reporting requirements under the new Modern Slavery Act, we ran an interactive workshop and produced a guidance note with more specific information about how companies in the seafood sector might think about the content of their statement. Other briefing documents and guides have also been produced to help the seafood industry have a common understanding of this issue.





PROGRAMME

Ports & Auctions

Seafish coordinates activities for the ports and auctions sector which is a vital route for fishery products entering the supply chain in the UK.

WORK PROGRAMME
OVERALL KPI

Year on year improvement in stakeholder satisfaction score from baseline established in year one survey.

WORK PROGRAMME ANNUAL
TARGET FOR 2015-16

- 10% increased sentiment from baseline.

PROJECT

PORTS AND AUCTIONS

Specific issues will be identified following discussions with stakeholders (started in November 2014). A prioritised list of issues will be developed and projects to address those issues will be undertaken. Current suggestions include; impact of landing obligation on the sector; review of the changes in the port auction sector in the past decade.

DELIVERY ON TARGETS 2015-2016

Prioritised list of issues developed and agreed with British Ports Association Fishing Ports Group (BPAFPG).

Secured agreement that the identified issues could be accommodated through the development of a Responsible Fishing Ports and Harbours Standard (RFPHS). Development of the standard would improve transparency and traceability of operations carried out within the ports sector; providing reassurance to the downstream supply chain.

The RFPHS concept was assessed through a detailed scoping study and received support from the ports sector and the seafood supply chain. The findings were presented to the BPAFPG and support was obtained to take forward the development of the standard.

Eight major fishing ports were visited to discuss and further develop support for the RFPHS.

An Oversight Board was established and, at their first meeting in January 2016, agreed the scope of the standard.

Ports and Auctions

Activities within the Ports and Auctions work programme have been developed to address significant issues considered to be constraining the development of the sector, namely inconsistency of operating practices, and a perceived lack of transparency and traceability.

- The core initiative has been to develop a standard (Responsible Fishing Ports and Harbours Standard) that aims to address the issues identified and act as a coherent link between responsible operations at sea (RFS) and initiatives along the downstream supply chain, to provide reassurance to the supply chain. As work progressed, the initiative gained support from fishing ports and the wider seafood supply chain.
- We carried out a successful port engagement exercise, where we were able to identify the main issues that were constraining the sector and which also helped to develop a greater understanding of the sector.
- Following agreement with BPAFPG that most issues identified could be addressed through the development of a fishing ports standard, we commissioned a successful scoping study that showed strong support for the concept of a standard, from both fishing ports and the supply chain. In carrying out this work, we were able to secure high calibre feedback from stakeholders to help understand the different views and priorities, which were essential to develop the way forward.
- In progressing the Responsible Fishing Ports and Harbours Standard, after BPAFPG approval, we established two important groups (Oversight Board and Technical committee), and again were able to secure high calibre input to ensure the development of the standard is based on a secure foundation. This work will continue to develop over the next two years.

This is an important project that will eventually benefit all sectors of the fishing industry; Seafish's help and support in driving it forward has been very much appreciated by all concerned and will prove pivotal to its eventual introduction as an industry standard."

Peter Bromley, Sutton Harbour Master and Head of Plymouth Fisheries, and member of RFPHS Oversight Board.





PROGRAMME

Risk Assessment for Sourcing Seafood (RASS)

RASS will provide industry with 'real-time' information at a fishery level to enable seafood buyers to make informed sourcing decisions and develop responsible sourcing strategies.

WORK PROGRAMME OVERALL KPI

3 Retailers and / or foodservice companies using RASS for sourcing seafood.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

One major retailer / food service company using RASS to inform their seafood sourcing policy.

PROJECT

RASS MANAGEMENT

Continued creation and maintenance of RASS wild fisheries profiles by external scientists and development of the functionality of the web tool. Work overseen by the RASS steering group.

RASS ETHICS DEVELOPMENT

Scoping of information appropriate to be captured within RASS relating to ethics. Work overseen by RASS steering group.

Provision of advice and guidance to stakeholders.

RASS AQUACULTURE PROFILES DEVELOPMENT

Scoping of information appropriate to be captured within RASS relating to aquaculture. Work overseen by RASS steering group.

RASS OUTREACH

Promotion of RASS to the UK supply chain, media and fisheries science community to ensure wide scope of awareness and engagement.

DELIVERY ON TARGETS 2015-2016

All wild fishery Responsible Sourcing Guides replaced by RASS by June 2015 and >320 profiles now live.

RASS steering group well established. Three meetings have been held so far with members including Waitrose, Morrisons, Lyons, Young's, Icelandic Seachill, MSC and the MCS.

Quality Assurance and Control Processes for the creation and maintenance of profiles fully implemented and working well.

Minor improvements to the RASS tool implemented, further work identified relating to map functionality for 2016/17.

Partnership formed with Sustainable Fisheries Partnership (SFP) and Seafood Watch (Monterey Bay Aquarium) to develop the Social Responsibility risk methodology at fishery level.

Ten pilot fisheries agreed and a RASS Ethics working group formed to provide guidance on phase two.

Input and feedback sought from the Ethics Common Language Group at each stage.

Content for three pilot profiles drafted by CEFAS and positive feedback on the potential profile format received.

Aquaculture Manager invited to join the GSSI Aquaculture Expert Working Group.

Case studies created on businesses from every sector describing how they use RASS to inform their sourcing policies to accompany the testimonies already received from retailers and food service companies.

RASS newsletter in created with more than 50 recipients identified for the first circulation in May.

Academic paper in final draft for submission by summer.

Retailers, processors and foodservice companies using RASS for sourcing seafood during 2015

Following the launch of RASS in 2014 the team have maximised every opportunity to promote the tool and highlight how it can support informed decision making in relation to the environmental impact of wild fisheries supplying the UK market. We also sort a wide range of feedback from commercial buyers as we look to continue to expand content to include ethics and aquaculture profiles.

“Direct Seafoods have found the new Seafish RASS tool an invaluable source of quick and easy to navigate information that gives an unbiased view on the sustainability risk of many different species. One can see fantastic potential for the future as the database increases and more and more species are added as well as features like seasonality. RASS will become the go to resource for conscientious fish buyers all around the world.”

Laky Zervudachi, Direct Seafoods

“We have our own internal mechanism for approving any new suppliers or seafood species for our fish counter or pre-packed seafood range. RASS is our belt and braces. It provides us with additional background information, including scientific assessments, that is really useful...It’s an extra level of due diligence, over and above our own.”

Riyaz Dhalla, Brand Policy Manager, Waitrose

“Young’s use RASS on a weekly if not daily basis to help populate our in-house risk assessment metric as part of our fish for life program.”

David Parker, Head of Corporate Social Responsibility, Young’s Seafood

“Thanks for your kind email and direction on how to use RASS. I have found it very useful, easy to use and in a language everyone can understand. A great tool from our point of view.”

Alma Cardenas, Compliance Manager, Joseph Robertson Ltd

“The up to date insight provided by the knowledgeable RASS team is developing into an excellent first stop/one stop point of call for all of our fish species sourcing information - very strong on UK caught species with good broad basis of species information.”

Mark Webber, Ocean Fish





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2015-2016
<p>Economic Data Collection</p> <p>Seafish will collect financial, operational and strategic information from the UK fishing fleet and fish processing industry.</p>	<p>ANNUAL FLEET ECONOMIC SURVEY REFERENCE YEAR 2014</p> <p>Collect vessel business annual accounts for reference year 2014. Data on costs and non-fishing income allows us to fulfil EU obligations under the DCF to provide economic variables for the UK fleet</p>	<ul style="list-style-type: none"> • We collected accounts from vessels throughout the UK and met sample size targets stated in the UK National Programme. • Data was submitted as required by the European Commission on 26 March, three days before the deadline. • We met the KPIs agreed with the MMO. • We achieved 579 completed survey forms, slightly lower than planned, but from these interviews we received 469 permission forms for vessel accounts, which was slightly higher than planned. • We conducted a survey of vessel owners' strategic intentions given the implementation of the Landing Obligation. • We conducted a fleet employment survey on behalf of Marine Scotland and delivered the data set to them for analysis.
<p>WORK PROGRAMME OVERALL KPI</p> <p>The UK complies with DCF data submission and data quality requirements.</p>	<p>ANNUAL PROCESSING SECTOR FINANCIAL SURVEY - REFERENCE YEAR 2014</p> <p>Collect business accounts for reference year 2014. Data on costs and earnings along with data from the most recent census allows us to fulfil EU obligations under the DCF to provide economic variables for the UK fish processing industry.</p>	<ul style="list-style-type: none"> • Annual accounts from processors were collected for all FTE bands and we had an overall sample rate of 21%, which met targets in the UK National Programme. • There was no data call from the European Commission this year for processing sector data, however we prepared the UK data set which is ready for when there is a call. • We substantially improved our processing sector database, making it more robust and useful for future years' data.
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <p>Compliance with all data submission and quality requirements along with an annual increase in the level of industry participation in Seafish surveys.</p>		

Economic Data Collection

Marine Scotland once again asked Seafish Economics to conduct a comprehensive survey of employment in the Scottish fleet to ensure that they and industry have an update of the detailed picture that was produced from data collected during our previous survey in 2013.

“Many thanks to you and your team for the final outputs from the Employment Survey. It is evident from our last meeting and within the attached, the volume and quality of work that has gone into this project. You should, rightly, be proud of the work you and the team have produced, in a very professional manner and I look forward to producing the final outcome in due course. Once again, many thanks for a sterling job!”

Dr Estelle Jones, Marine Social Scientist, Project lead at Marine Scotland

Improving engagement with vessel owners in poorly represented fleet segments

For each of the three fleet segments with lowest levels of engagement there was a demonstrable improvement in the sample size. Whilst there were no accounts collected for the Area VIIB-K 24-40m segment, this was the first time in a number of years we have conducted any kind of interview with the owner of such a vessel and hopefully may lead to accounts in future years.

For Longliners and Under 10m drift and/or fixed nets we also collected a number of 2013 accounts to help boost the sample size for that year.

*Does not include additional 2013 accounts collected in 2016.

Seafish Segment	Number of interviews 2013	Number of interviews 2014	Number of Accounts 2013*	% of total segment	Number of Accounts 2014	% of total segment
Area VIIB-K 24-40m	0	1	0	0%	0	0%
Longliners	1	4	1	4%	2	7%
Under 10m drift and/or fixed nets	24	26	9	4%	15	6%





PROGRAMME

Economic Analysis and Evidence

Seafish will use collected data to publish and present key information and evidence bases relating to industry economics.

WORK PROGRAMME OVERALL KPI

80% of report users express satisfaction.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

Publish: fleet economic short report; 2015 time series fleet economic data set; 2015 Quay Issues magazine; Economic Impact Assessments of the Landing Obligation.

PROJECT

SEAFISH ECONOMIC REPORTS

- Fleet economic short report, Reference Year 2013
- Fleet economic time series data Excel tables on our website
- Seafish fleet magazine – Quay Issues, reference year 2015
- Prep for processing sector report in 2016

FILMED PRESENTATIONS

Of key publications

ECONOMIC IMPACT ASSESSMENTS

- Fisheries management options, e.g. the landing obligation
- Input / output analysis
- DISCARDLESS

DELIVERY ON TARGETS 2015-2016

We published and disseminated the planned reports:

- fleet economic short report, reference year 2013
- 2015 time series fleet economic data set
- 2015 Quay Issues magazine
- Economic Impact Assessments of the Landing Obligation

We made substantial improvements to the style and layout of our reports, presenting them as a Quay Issues branded suite of reports. We also made short films of case studies from our QI magazine and these have been popular on YouTube.

We made key presentations by webinar, including for fleet economic time series data and the landing obligation economic impact assessment. These webinars were recorded and made available for watching via YouTube. We had very positive feedback from participants in the webinars.

We published further economic impact analyses and tools relating to the landing obligation and published the final report of the project in February 2016.

We conducted detailed analysis of the over 15m scallop sector for the Scallop Industry Consultation Group and presented results at meetings and in a published report. Feedback from those at the presentations was very positive about the discussion stimulated among industry and government as a result of our analyses.

We did not have sufficient staff in the team to include a new input / output analysis of the UK seafood industry.

We contributed to economic impact assessment work packages as a partner in the EU project DiscardLess.

Economic Analysis and Evidence

Our regular reports are now all integrated and are Quay Issues branded. We have received very positive and encouraging feedback from report users.

“I have now read [the Landing Obligation EIA report] and it is an admirable piece of analysis – you and the team at Seafish have done some sterling work. Once again congratulations for the fantastic work. I am slowly beginning to understand the complexity of the industry and I have great admiration for your heroic efforts on this one.”

Dr Cornelius Chikwama, Head of Marine Analytical Unit, Marine Scotland.





PROGRAMME

Economic Advice

This programme ensures that Seafish can use its expertise and evidence bases to deliver appropriate economic advice to industry and Government.

**WORK PROGRAMME
OVERALL KPI**

Year on year improvement in stakeholder satisfaction score from baseline established in year one survey.

**WORK PROGRAMME ANNUAL
TARGET FOR 2015-16**

Draft Programme completed for International Institute of Fisheries Economics and Trade 2016 in Aberdeen; contribute to two STECF plenary and two expert working groups; organise two UKFEN meetings; present two papers at EAFE conference 2015.

PROJECT

IIFET 2016 SCOTLAND

Conference planning and promotions.

GENERAL ECONOMIC ADVICE

Appropriate advice readily available for key stakeholders.

SUCCESS

DELIVERY ON TARGETS 2015-2016

We have lead the local organising committee to plan and promote the IIFET 2016 Conference in Aberdeen in July 2016

We received a record number of proposals for special sessions and over 500 abstracts were submitted.

All key note speakers for the conference were agreed and accepted.

Industry and Policy Day planning was advanced with a large number of high quality speakers and a detailed draft programme.

During the year, we answered over 150 ad-hoc enquiries from stakeholders with an estimated value of £185,000.

We presented webinars of key publications including the landing obligation impact assessments and the fleet economic data set.

We contributed to meetings of the Scallop Industry Consultation Group and meetings of industry and government on aspects of the landing obligation.

We attended and contributed to plenary meetings and expert working groups of STECF.

We organised and delivered two general meetings of the UK Fisheries Economics Network and published a report arising from an UKFEN workshop on comparing values of industry sectors.

We attended and presented at the 2015 conference of the European Association of Fisheries Economists, where our Chief Economist, Hazel Curtis, handed over the presidency of the association after two successful terms of office.

Due to staff shortage for most of the year, we passed this work on to one of our close network of consultants, ensuring that the SUCCESS project suffered no adverse effects.

ECONOMIC ADVICE

To improve the value of our outputs, such as our impact assessments and our online fleet economic time series data set, we wanted to explain it to key stakeholders and we did this by webinar.

Comments made by audience members at the end of our webinar presenting our fleet economic data set:

"I think this is a really great dataset. And it's great to have a webinar on this, because a lot of it is communicating what you can actually do with it."

Dale Rodmell, NFFO

"First I need to congratulate you on the work. I think it's a fantastic resource. I'm quite astonished at the information that's been incorporated into it and the use that can be made of that."

Robert Stevenson, Lunar PO

"Great work, like everyone else says, fantastic".

Nick Walters, North West IFCA

We were asked by the chair of the Scallop Industry Consultation Group to help with detailed economic analysis of the over 15m scallop sector, as there was concern in the industry that their profitability had been declining in recent years and they thought it was because of the effort management regime.

We attended meetings, presented preliminary analyses and built trust with the people in the sector. In December, our results were presented to the SICG meeting in London and we published a report explaining that the decline in profit was real but was due to decline in catch efficiency.

Regarding the scallop fishery economic analysis conducted for Marine Management Organisation and the Scallop Industry Consultation Group presented on 9 December

"I'm in the scallop meeting and I just wanted to let you know that your slides were fantastic and the work has got everyone here talking. It's a terrific bit of work that you and Arina have accomplished so thank you."

Dr Sarah Pilgrim-Morrison, Head of Effort Management Team at the MMO

"Can I just second Sarah's praise. I thought that the work presented was of very high quality and was well targeted at meeting the objectives originally set out. I thought that Sebastian handled a tricky audience with poise. [...] Thank you again for the hard work you have all done on this."

Simon Dixon, MMO



CORSTAL FLY	3.50	1.00	KING
Plaice 4+			
0326 PLAICE 3	2.60	1.50	FISH
0326 BASS 5	4.90	6.00	STEP
0326 BASS 4	3.50	7.00	KINGF
0326 BURNARD 4	7.20	1.40	KINGF



PROGRAMME

Reducing Red Tape

WORK PROGRAMME
OVERALL KPI

Year on year improvement in stakeholder satisfaction score from baseline established in year one.

WORK PROGRAMME ANNUAL
TARGET FOR 2015-16

Work with all stakeholders to achieve proportionate regulation and communicate our work to stakeholders.

PROJECT

FOOD REGULATION

- Work with stakeholders from all sectors of industry, competent authorities such as Defra, FSA and DoH, Enforcement such as TSI, CIEH and local authorities.
- Three meetings per year to bring stakeholders together with regulators to discuss current issues.
- Horizon scan for legislative proposals and analyse their impacts on industry. Inform and seek views from affected sectors, work with CA to achieve proportionate Regulation.
- Help industry compliance via 12 newsletters a year, 4 guides to compliance a year and enquiry service.
- Keep industry, CA and enforcement agencies informed via monthly newsletter, social media, 2 stakeholder events per year.
- Hold 2 importers forums a year to bring stakeholders together to discuss current issues.
- Provide support for importers organisations.

DELIVERY ON TARGETS 2015-2016

- Worked with Defra, FSA, DoH, Marine Scotland, FSS BRDO industry/regulator groups (business, labelling and standards, hygiene, trade facilitation).
- Three seafood Legislation Expert group meetings. Now a BRDO group within BIS.
- EU and UK alert monitoring as well as information from networks used to gather information.
- Involvement in issues (biocides, arylamide, unauthorised additive use, glaze weight determination, fish traceability implementation, Defra guidance rules, landing obligation and conflict with buyers and sellers, animal by products and hygiene rules).
- Monthly newsletter and weekly updates issued. Primary authority agreed to make guidance assured and give protection against prosecution. 256 enquiries logged with a value of £217,600.
- Three stakeholder events on glazed weight determination, glazed weight declaration and date of first freezing, corporate plan launch event in Brussels. Website kept up to date with latest alerts and Seafish publications.
- Two importers forum meetings
- Support provided to SIPA

Highlights

"I am grateful for your hard work in putting together expert advice to industry on how to apply the new regulations. It's sensitive work which you handle with great skill."

Tom Stafford, Defra Labelling team

We signed up to a Primary authority agreement with West Yorkshire Trading Standards to give businesses more confidence in using Seafish guidance. Guidance is always drafted in consultation with the national regulator but this additional assurance can be used as a defence if challenged.

New assured guidance on Weight Declarations on Glazed Seafood was published. A change in labelling regulation was causing confusion for both business and enforcement so a guide was written in consultation with labelling and weights and measures regulators. All regulation applicable to weight declarations was included to extend the guidance to cover food sold loose and to other businesses to improve consistency between sectors.

We arranged two stakeholder meetings with regulators and industry to gather information on the problems caused by weight declaration and first date of freezing rules as well as discussions on the official method of testing glaze levels. Both meetings collected industry views to feed back to the Commission working group. Three regular Food Legislation Expert Group (FLEG) Meetings were held, and two importers forum meetings. These bring industry and regulators together to discuss current issues. The FLEG has been incorporated into the Better Regulation Delivery Office group of expert groups giving it more influence.

The importers forum is working with a newly formed BRDO expert group on Trade Facilitation.

A successful event was held in Brussels with key stakeholders and EU officials to launch the new corporate plan and raise awareness of Seafish among the EU institutions.

We were invited to join an EU Commission inspection of enforcement of fish traceability rules. Seafish guidance was well received. Following this we are now included in the planning of seafood industry inspections by the Commission, the next being fish processors in the South West.

We identified conflict with the landing obligation and the animal by product regulation. This would have resulted in all non marketable fish having to be landed at premises approved to handle animal by-products with a potential cost to all landing sites, distortion of fish landings and ultimately increased costs to the industry when the risks were already covered by food hygiene rules. We wrote papers explaining the rules and the problems caused and the Commission now allow non-marketable fish to be landed as 'food'.

There has been an issue with the Chinese prohibiting the import of crabs from the UK due to cadmium levels and differences in the Chinese and UK testing regime. We worked closely with Defra, Cefas and industry to resolve the issue and part funded and involved in arrangements for Chinese official visits to resume crab exports. China has now agreed to lift the import ban subject to testing arrangements which are currently under discussion.





PROGRAMME

Market Insight

Our Market Insight work provides up to date market data that allows Seafish to speak authoritatively on seafood and is also used by seafood businesses in their decision making.

**WORK PROGRAMME
OVERALL KPI**

Year on year improvement in stakeholder satisfactory score from baseline established in year one survey.

**WORK PROGRAMME ANNUAL
TARGET FOR 2015-16**

10% increased sentiment from baseline
Opening rate for newsletters increases from baseline of 29%.

PROJECT

MARKET INSIGHT

To provide market reports covering key market channels to provide information, analysis and insight on the seafood market.

ADVICE

Provision of bespoke advice to businesses and the media

DELIVERY ON TARGETS 2015-2016

- We produced 474 data reports, covering retail, foodservice and trade data, exceeding our target of 200.
- The newsletter was circulated to 565 subscribers each month, highlighting the new information and reports available.
- We presented data at 46 different roadshows and stakeholder meetings throughout the year.
- We introduced a new series of factsheets to facilitate understanding of key market areas including cod, tuna, foodservice, fish and chips in foodservice and seafood consumption.

Advice is provided to businesses, seafood stakeholders and the media on request. Using our estimated values, we delivered £335,000 of advice over the year. This exceeded our £250,000 target.

MARKET INSIGHT

Market Insight

Market insight is a key Seafish service which combines regular reports, bespoke advice, meetings and industry seminars/conferences to enable seafood businesses to make informed business decisions.

We commissioned an independent 'value for money' evaluation to identify the benefit derived from this work programme. A number of benefits were identified and from a purely financial perspective, the estimated value of market insight to the seafood industry was £5.3 million for this year. This represents a cost to benefit ratio of 17:1 (over 4 is classed as high value by Government). The main financial benefits are cost avoidance and time savings in businesses accessing the data, as well as value of enquiries delivered.

Market Insight also carries out a stakeholder satisfaction survey of our data subscribers. In the 2015 survey, over 70% of respondents rated this work area as either 'good or excellent'.

"The data supplied on the growth of added value (prepared) within certain species has enabled us to identify new distribution opportunities across a numbers of grocers leading to strong double digit growth in many areas. The general monthly context reporting has helped identify fast growing species and enabled us to broaden range within existing customers and also new species opportunities with other customers".

Charlie Holland, Marketing Controller,
New England Seafood International Limited.





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2015-2016
<p>Technology</p> <p>Our Technology programme provides advice and training to enable improvements within the catching sector, including technical support to reduce the impacts of the impending landing obligation.</p>	<p>GEAR SELECTIVITY TRAINING</p> <p>Training of fishermen in trawl gear technology and selectivity (managing discards).</p>	<p>Over 90 fishermen have completed training courses including groups from NE Scotland, Inner Moray Firth, Mallaig, Islay, Northern Ireland, Newlyn, Newhaven, Looe, Brixham and North shields.</p> <p>Four case studies captured flume tank work being transferred to full scale sea trials, resulting in several articles in Fishing News and Fishing News International.</p>
<p>WORK PROGRAMME OVERALL KPI</p> <p>100 fishermen trained in Gear Technology and Selectivity with follow up testimonials.</p>	<p>GEAR DATABASE</p> <p>Launch and development of website. Delivery of an outreach strategy to raise awareness of website.</p>	<p>Over 1600 sessions logged since launch July 2015, with many verbal testimonies received confirming benefit of use.</p> <p>Articles on the Technology programme and the Gear Database have been featured in Fishing News, Fishing News International, Commercial Fishing and the Irish Skipper.</p> <p>Confirmed use by the Gear Innovation and Technology Group (GITAG), SIDI, Scottish Fishermen's Federation (SFF) and Marine Scotland to assess selectivity projects.</p>
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <p>30 fishermen trained in gear technology.</p>	<p>GEAR TECHNOLOGY ADVICE</p> <p>Provision of detailed technical advice on design and operation of fishing gear and fishing operations.</p>	<p>66 in depth enquiries and 34 low level enquires, many others unrecorded due to time restraints.</p> <p>Over 2400 downloads of the Basic Fishing Methods booklet as well as 2000 hard copies requested for distribution.</p>
	<p>(GEAR) TECHNOLOGY EQUIPMENT MAINTENANCE</p> <p>Oversee the ongoing maintenance of the Seafish gear technology research equipment.</p>	<p>All kit, including scanmar gear monitors, tension cells, recording equipment and underwater cameras, has been tested and maintained where necessary.</p>

TECHNOLOGY

Gear Selectivity Training for non-fishers February 2016

A two-day technology and selectivity course was included within the fishers' training programme at the SINTEF flume tank at Hirtshals, attended by twenty five non-fishers including representatives from the Marine Conservation Society, IFCA, MMO, WWF, fisheries administrators and scientists from a number of associations/institutions and a number of PhD students.

The specially arranged course delivered first-hand experience of the selectivity measures fishermen have implemented in recent years before the demersal landing obligation started to be phased in at the beginning of this year. Participants were able to examine and observe many types of fishing gear in action in the flume tank and the selectivity associated with larger mesh nets was also practically demonstrated.

Fishermen have been quietly developing and fine tuning highly selective gear for a long time and the individual elements of the Technology work programme interact to improve the availability of this information across all sectors of the UK Seafood Industry. The non-fishers course enabled key stakeholders from the on-shore sectors and NGO community to establish a better informed perspective in their engaging with the Catching Sector going forward. At a time when the landing obligation continues to generate high levels of attention, it is important to raise awareness of the potential solutions that are possible at the same time as understanding some of the challenges selective measures bring.

"I'd just like to extend my profound gratitude, this was a genuinely fantastic course, made a real difference to me – clarified many things and I believe will really help me to focus Young's work in supporting the industry in the advent of the discard ban."

David Parker, Head of Corporate Social Responsibility, Young's Seafood

Testimonials relating to Basic Fishing Methods booklet

The widespread use of the updated Basic Fishing Methods booklet and positive feedback on its value to industry has far exceeded expectations, with positive testimonials received from industry representative, training providers, scientists and UK seafood businesses:

"A really excellent booklet and should be widely distributed"

Mike Park, Chief Executive, Scottish White Fish Producers' Association (SWFPA)

"I just wanted to say it looks fantastic, I think it will be a really great resource for the future and hope we can include links from the MCS page to your information"

Debbie Crockard MSc, Fisheries Policy Officer, Marine Conservation Society





PROGRAMME

Industry Issues Groups

Our Industry Issues Groups provide an essential route for sharing information and knowledge across a range of stakeholders and are a valuable information source for the supply chain.

WORK PROGRAMME OVERALL KPI

Year on year improvement in stakeholder satisfaction score from baseline established in year one survey.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- 10% increased sentiment from baseline.
- Total number of stakeholders increases from baseline of 700.

PROJECT

SECRETARIAT OF GROUPS

This is an ongoing facilitation service delivered by Seafish which involves organising meetings and providing information on a regular basis to the wider circulation list.

ISSUES

Specific actions are taken from the Issues Groups meetings and result in additional work, for example the preparation of briefings, Seafish guides etc.

DELIVERY ON TARGETS 2015-2016

- There are six groups that meet, and two receive regular news alerts.
- The number of stakeholders engaged with the groups increased to 1127 over the year, exceeding our target of 700.
- 429 stakeholders attended the 12 meetings held during the year.
- Feedback scores from meeting attendees were over 8 out of 10 across all meetings.
- 40% to 60% of recipients are opening and reading the information provided in each newsletter they receive.

- Numerous briefing notes and guides have been produced across the various issues groups.
- The various briefings and presentations associated with the issues group meetings have been downloaded nearly 45,000 times over the course of the year.
- All the associated web pages have been kept up-to-date.

INDUSTRY ISSUE GROUPS

Topical and current issues highlighted

Our industry dialogue groups cover a huge range of issues including fish stock status, environmental factors, policy concerns, discards, aquaculture, seafood integrity including ethics, seafood standards and reputational challenges, as well as pelagic and fishmeal interests. They are prime examples of an integrated, interdisciplinary, co-operative approach to key issues and are often the only UK cross-industry group addressing these issues from all perspectives. They are an invaluable way for industry to learn about new issues and to be kept up to date on the latest developments and initiatives within their area of interest. Keeping abreast of both current issues and issues that could potentially impact on the reputation of the seafood industry is paramount – in the last year the groups have explored such diverse topics as microplastics, the status of North East Atlantic fish stocks, Fishery Improvement Projects (FIPs), genetically modified fish, the impact of the landing obligation, the Modern Slavery Act, non-EEA workers in the Irish fishing industry, anti-slavery work in Thailand, aquatic food security and UK oyster production.

“Seafish’s Seafood Ethics Common Language Group (SECLG), has been proving ‘elucidating’ in terms of what is going on in the main production regions around the world to tackle unethical practices. It has been brilliant in pulling a lot of important intelligence together and sharing it among stakeholders to create much-needed common understanding.”

Laky Zurvudachi, Direct Seafoods

Positive engagement and feedback

The groups are facilitated by Seafish and the feedback from attendees is that they really value the meetings as an opportunity to keep abreast of hot topics, to listen to the issues raised by other parts of the industry and to network with other participants. The number of meetings has remained constant and the number of attendees at each meeting has typically increased, or has at least been maintained.

The number of people who have engaged with the groups has grown progressively in the last year. Between April 2015 and March 2016 the total circulation list has increased to 1127 names. News alerts are issued regularly and surveys have shown that the news alerts are highly valued. The great majority of respondents thought the information was extremely useful and topical. Our new look newsletters, launched in May 2015, show that 40% to 60% of recipients are opening and reading the information provided in each newsletter they receive.

“Facilitation is enormously important and Seafish are great at this. The range of people involved is crucial to elevate the conversation around the challenges, and show-case the successes, within our industry and across stakeholders, to benefit the industry as a whole.”

Lucy Blow, New England Seafood

“Your well-organised and attended meetings are one of the best gatherings of diverse industry representatives.”

Ross Jolliffe, Cefas





PROGRAMME

Tailored Advice

We provide a programme of expert fisheries advice for our stakeholders, to help inform their decision making.

**WORK PROGRAMME
OVERALL KPI**

£300k worth of advice to levy payers, as captured by the Enquiry Log.

**WORK PROGRAMME ANNUAL
TARGET FOR 2015-16**

£100k worth of advice to levy payers, as captured by the Enquiry Log.

PROJECT

TAILORED ADVICE

Provide clarity and guidance on fishery data and sustainability issues, both proactively and reactively, to facilitate decision making in the supply chain.

DELIVERY ON TARGETS 2015-2016

- Two information sheets created on emerging issues – ‘Electrofishing in Marine Fisheries’ and ‘Fishing Activities in Ecological or Biologically Sensitive Areas in the Barents Sea and Adjacent Waters’. A third information sheet on Micro-plastics is in final draft and undergoing peer review prior to release.
- £85k worth of advice to levy payers delivered as evidenced in the Seafish Enquiry Log. The value of enquiries handled is dependent on those received and we are confident that our plans to increase awareness of the Tailored Advice work programme to industry will ensure the overall KPI will be met.
- Expert input has been provided in several forums, including attendance to the ICES Annual Science Conference and the ministerial workshops to contribute to the development of the 25 year Environmental Plan.
- TACs and Advised TACs analysis published on the Seafish website.
- Contribution to the development of a project plan for scallop dredge selectivity trial to be run by SWPO with CEFAS providing staff, Macduff Shellfish Limited providing the vessel and DEFRA providing finance; field trials completed, data captured and analysis commenced at CEFAS.

Fishing activities in a vulnerable region of the North Barents Sea

“The Greenpeace campaign will resonate with consumers and raises genuine concerns over the protection of pristine and vulnerable marine ecosystems. The UK industry needs to be able to engage with all of the stakeholders in a dialogue based on sound science.

To do this we need to access a summary of the published data and scientific papers in a format that is concise yet covers all of the key issues. The Seafish review of the facts surrounding the Barents Sea EBSA was exactly what we were looking for and has proved invaluable in preparation for our conversations with the Norwegian scientists and the campaigning NGOs. Knowing that Seafish will provide us accurate and up to date briefings as the data becomes clearer gives us confidence to engage with these stakeholders in developing constructive solutions to the issues.”

Nigel Edwards, Technical and CSR Director, Icelandic Seachill

Following the publication of a report by Greenpeace, calling for UK seafood companies to stop buying cod from the Barents Sea or risk having it tainted with destruction of an Ecologically or Biologically Sensitive Area around Svalbard Island in the Barents Sea, our Sustainability and Data Advisor produced a Seafish report to inform understanding of the extent of the sea ice and fishing grounds in the North Barents Sea and any trends in northward migration of fish and the vulnerability of the ecosystem. It was found that area is recognised as vulnerable by the Norwegian government and is the subject of intensive scientific effort and measures to protect vulnerable habitats.

This scientific effort is enabling the opportunity to improve management in the North-eastern Barents-Kara Sea EBSA and the area around Svalbard in a collaborative approach between science, government and industry. The Barents Sea is one of the most well managed regions in the world with measures in place to protect vulnerable species including sponges and corals and several MSC certified fisheries, including cod. The Seafish report enabled the major seafood companies being targeted to coordinate an informed response to the campaign. This is just one example of how the Tailored Advice work programme provides guidance to key stakeholders who benefit from our expertise to facilitate informed discussions relating to complex risk areas, protecting the reputation of the Seafood Industry on a wide range of subjects and issues.





PROGRAMME

Safety & Training: Marine Survey

Our Marine Survey Team provides fishermen and boatbuilders with expertise, information and guidance for the construction, maintenance and inspection of safer fishing vessels.

WORK PROGRAMME OVERALL KPI

600 contracts secured for vessel survey and inspection.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- 200 vessels surveyed and inspected
- 350 enquirers receiving free advice

PROJECT

NEW BUILD CERTIFICATION

Survey/inspection and certification of new build vessels, including construction standards development.

REGISTRATION INSPECTIONS

Comparison reports issued to the Maritime & Coastguard Agency for the considered acceptance to the commercial fishing register.

CONSULTANCY

To provide industry with a bespoke consultancy service to meet the needs of a service requested which are within the remit and expertise of the group.

ADVICE TO INDUSTRY

To provide expert and associated advice to standards and regulations for the safe construction and outfit of fishing vessels.

DELIVERY ON TARGETS 2015-2016

83 new build vessels were certified, including:

- 53 x Under 7m length overall (LOA) vessels
- 19 x 7 metre – 10 metre LOA vessels certified
- Eight x 10 metre – 15 metre LOA vessels
- Three x 15 metre – 24 metre Registered Length (RL) vessels

119 existing vessel inspections/reports were completed, including:

- 96 x Under 7m LOA vessels
- 20 x 7 metre – 10 metre LOA vessels certified
- Three x 10 metre – 15 metre LOA vessels

Seven consultancy contracts were completed, including:

- Northumberland Inshore Fisheries & Conservation Authority advice, guidance and survey services - during the procurement process, design, build and commissioning of a new 16 metre fisheries patrol/survey vessel "ST AIDAN".
- Three x yard inspections - minimum conditions and equipment required for the construction of GRP vessels.
- Three x fishing vessel modifications

- 789 enquiries were logged by the team
- The estimated value of the free advice and guidance provided was £268,800

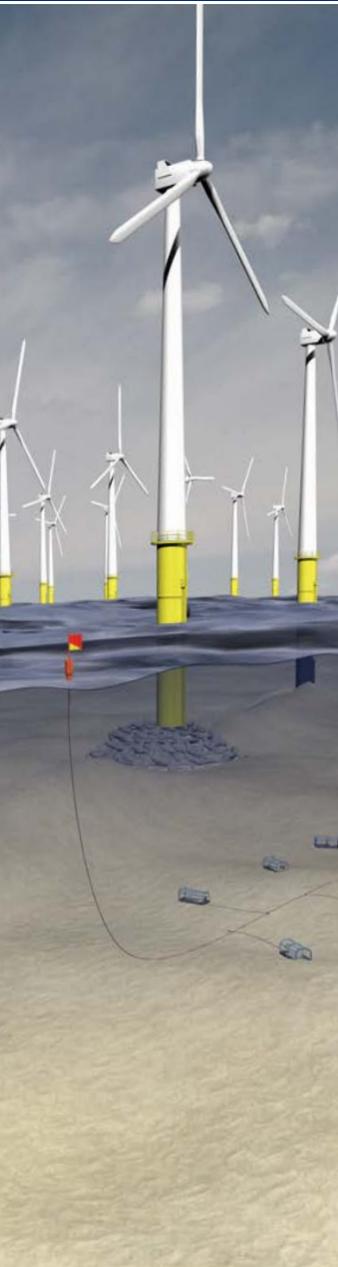
Consultancy for Northumberland IFCA

This was a consultancy project undertaken by our Marine Survey team to provide the Northumberland IFCA with expert advice, guidance and survey services during the procurement, design, build and commissioning of a new 16 metre fisheries patrol/survey vessel, the "ST AIDAN".

"On a personal note and like the whole of the NIFCA Procurement Team, I am extremely grateful for all of your hard work, professionalism and dedication to this project. We are delighted with the outcome, which would not have been possible without your input."

**Mr Michael Hardy LLB, Chief Executive,
Northumberland Inshore Fisheries & Conservation Authority**





PROGRAMME

Safety & Training: Kingfisher Information Service

Kingfisher aims to help prevent fishing vessel losses and dangerous incidents that are attributable to offshore hazards.

WORK PROGRAMME OVERALL KPI

Extension of Kingfisher service to include mapping locations of Marine Protected Areas.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- All fishing plotter CD/USB targets delivered
- All Kingfisher bulletin targets delivered
- Determine feasibility of commercially supplying MPA data

PROJECT

FISHSAFE

Supply of offshore oil and gas industry positional information to fishermen

KIS-ORCA

Supply of offshore cable and renewable energy industry positional information to fishermen

KINGFISHER BULLETINS

Supply of frequent offshore hazard and activity news to the fishing industry

DKCPC

Supply of Danish offshore cable industry information to fishermen

MARINE PROTECTED AREAS (MPAS)

A new project to examine the types of marine protected areas surrounding the UK, their implications for fishermen and the feasibility of mapping for the fishing industry.

DELIVERY ON TARGETS 2015-2016

- Converted and supplied ~4,500 fishing plotter files for UK oil & gas structures and hazards.
- Managed FishSAFE.eu updating fishermen of the latest offshore oil & gas news and new structures via the Google map.
- Attended three fishing exhibitions to promote the availability of new data and discuss safety issues. Worked with the fishing industry to improve and assist in developing new awareness technology.

- Converted and supplied ~2,500 fishing plotter files for EU cables and wind farms.
- Produced ~1,500 charts to inform fishermen of the location of structures and provide educational material of main hazards
- Attended three fishing exhibitions to promote the availability and importance of cable and wind farm awareness.

- Supplied 26 issues of the Bulletin, for four industries, to over 1,000 people a fortnight.
- Used Twitter to deliver offshore news and bespoke charts, making 248,000 impressions.
- Developed and delivered the first issue of 'Talking Points', helping explain some complex offshore topics for fishermen.

- Converted and supplied plotter files for Danish subsea cables.
- Managed a website to deliver downloads and an online map to fishermen.

- Project not undertaken due to lack of staff resources and non-availability of EMFF funding.

Offshore Renewables and Cable Awareness

Kingfisher's ORCA data for the booming subsea cable and offshore renewable energy industry has been steadily growing in size and importance over recent years. With over 50,000 km of subsea cable and 2,250 km² of wind farms now off our coast, the service has never been more critical for the safety of fishermen.

During the year, Kingfisher has worked to improve the awareness and understanding of the service within both the fishing and offshore industries. Kingfisher received some excellent supportive comments from RenewableUK and The European Subsea Cables Association, but more importantly, testimonies from the fishing industry were forthcoming.

It was particularly encouraging to gain such excellent statements, from high profile fishing industry spokespersons, highlighting the importance, coverage and first class nature of the service.

"Most people receive the Kingfisher maps and plotter files here and I'd highly recommend them to skippers. I have helped people install them on plotters, and it is a very useful resource."

Mike Cohen, Chairman of the NFFO and Chief Executive of the Holderness Fishing Industry Group

"The Kingfisher plotter data is excellent and a necessary tool for working fishermen. I am always telling fishermen about the function and how to use it, and how if it's put on their plotter, they'll get pictures of the windfarm on their screen. I think it is first class and I share that around."

Tom Watson, former skipper and a liaison officer in Fleetwood





PROGRAMME

Domestic Aquaculture

We will facilitate a collaborative approach to the delivery of local and national strategies by representing aquaculture interests to key stakeholders in government and industry.

WORK PROGRAMME OVERALL KPI

National Government's belief that the Seafish Aquaculture programme has contributed positively to the development of national strategies - measured by testimony.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

Work programme strategy developed for each nation.

PROJECT

DOMESTIC AQUACULTURE

Development of the work programme's strategy taking the requirements of each nation into account.

DELIVERY ON TARGETS 2015-2016

A wide range of stakeholders engaged to establish a foundation of knowledge around the main challenges and opportunities facing the aquaculture sectors in each devolved nation.

Our new Aquaculture Manager has participated in a wide range of forums pertinent to domestic aquaculture including, though not limited to, Welsh Aquaculture Advisory Committee, FAO Sub-Committee on Aquaculture, SAGB and ASSG Annual Conferences, and the GSSI.

English Aquaculture Working Group reinvigorated and agreed work completed; the group will now evolve to become the Seafish Domestic Aquaculture Advisory Committee to guide successful delivery of work in years two-three.

Two reports commissioned and in final draft that will provide a valuable foundation for work in years two-three – the "Assessment of Aquaculture Economics in England, Wales and NI" and the "Contribution and Value of Several and Regulation Orders in Relation to UK Shellfish Production". Also, new aquaculture information placed on the website, including Aquaculture Funding Guides, updated Aquaculture Responsible Sourcing Guides, and the Aquaculture Regulatory Toolbox

Many stakeholder testimonies gathered throughout to year to evidence positive contributions and outcomes. KPI testimonies received from DEFRA, Welsh Government and the Northern Ireland Executive acknowledging the positive impact this new work programme has had in 2015/16.

The Aquaculture Regulatory Toolbox for England

England's aquaculture industry is currently made up of diverse enterprises producing a range of aquatic species in marine, intertidal and freshwater environments. The Seafish 'Aquaculture Regulatory Toolbox for England' offers a single portal which hosts CEFAS (Centre for Environment Fisheries and Aquaculture Science) guidance on regulatory requirements for new aquaculture businesses in England and developed in collaboration with DEFRA (Department of the Environment, Fisheries and Rural Affairs).

The 13 individual aquaculture sector PDFs give summary information with links and contacts on the type of licences, authorisations and permissions required to set up and run a specific type of aquaculture business in both existing and emerging sectors. The Toolbox aims to present this complex information in an accessible format to a wide range of users across both public and private sectors. Launched in March, Phase one of the Toolbox is already receiving very positive feedback, and there are plans for Seafish to continue to support CEFAS in delivery of Phase Two of this project to further expand the scope of information featured.

Testimonial Highlights

FAO 2015 Code of Conduct for Responsible Fisheries
Aquaculture Questionnaire submission (on behalf of the UK):

"This is an important effort...your thorough exercise will be recorded. It will help us in the trends analysis and maybe as a case study..."

Dr Doris Soto, Senior Aquaculture Officer, FAO.

Attendance of FAO/COFI 8th Sub-Committee on Aquaculture, Brasilia, Brazil:

"Seafish has provided valuable contributions to the discussions at the FAO SCA/COFI meeting in Brasilia, as well as providing great support in preparing the agenda item on aquaculture certification and evaluation framework."

Herman Wisse, Program Manager, GSSI.

"Your insights into farm management throughout the week were very valuable...I will pass on the details about the Responsible Sourcing and RASS initiatives...these will be very useful information sources."

Eoin Mac Aoidh, Policy Officer, Aquaculture, European Commission.

New Economics Foundation 'Blue New Deal' meeting, London:

"Your knowledge and enthusiasm was very useful, as was your ability to link aspects of the BND vision to work Seafish is undertaking. It would be valuable to get Seafish support for our project and we can use our work to amplify your work in the aquaculture sector."

Chris Williams, Project Lead, Fisheries and Marine Environment, NEF.





PROGRAMME

Bivalve Mollusc Shellfish Safety

WORK PROGRAMME OVERALL KPI

Reduction in poisoning incidents relating to bivalve mollusc safety.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

Provide information and expertise to regulators and industry to reduce the risk of food poisoning related to bivalves.

PROJECT

BIVALVE MOLLUSC SHELLFISH SAFETY (BMSS)

- Work with stakeholders in BMSS such as FSA, CEFAS and SAGB to ensure the scientific evidence used to regulate bivalve molluscs is based on robust scientific evidence and that proportionate action is taken in controlling threats to human health from consumption of bivalve molluscs.
- Keep Industry informed on current regulation of bivalve mollusc production
- Produce guidance and advice on minimising threats to human health from consumption of bivalve molluscs.

MARINE LEGISLATION

- Work with stakeholders such as industry groups, MMO, Defra and Natural England on water quality issues that impact on industry. To include the Water Framework Directive, Marine Strategy Framework Directive
- Keep industry informed of developments via monthly newsletter and social media.

DELIVERY ON TARGETS 2015-2016

- Following media reports on Hep E in shellfish collaborated with HP Scotland and FSS. Hep E and Hep A dropped from the proposed EU baseline survey for Norovirus.
- EFSA proposed a sampling protocol and test method to conduct an EU survey of Norovirus in oysters and be able to set safe limits. Provided evidence to FSA and regions to draft a UK position for EU negotiation.
- Informed/involved national organisations and industry who lobbied FSA London and FSA Scotland on the EU baseline study protocols.
- Seafish were invited to be part of an international joint GAA technical committee to developed a 'Best Aquaculture Practices' (BAP) Standard for all molluscs.

- Worked with Defra, Environment Agency and Natural Resources Wales on various groups to develop policies which provide increased protection for water quality. Also worked with all groups on marine protected areas and marine planning and licensing. Worked with Defra on Aquatic Animal Health and Invasive Non-native Species.
- Newsletter produced monthly.

Shellfish Safety

“A business that is deeply committed to what it does, has a great deal of expertise and proper experience.”

Simon Taylor, Twin Seafood UK Ltd

The Global Aquaculture Alliance relies on its technical committee to develop international standards. Seafish were invited and took part in meetings in the USA and Canada. These meetings drew on international experts to form a multi-disciplinary team that was able to authoritatively draw up a set of criteria for best aquaculture practices, for the production of bivalve molluscs. Seafish took to the table a skill set centred on legislation and science associated with threats to human health. This type of activity by the Seafish team enables a realistic set of standards to be set that are achievable.

A significant increase in Hepatitis E (HEV) in Scotland was linked by media to a single report of HEV in a very small number of bivalves taken from a pig slaughterhouse slurry discharge point. The appropriate authorities although aware that there is no proven link between the consumption of live bivalve molluscs (LBM) and illness from HEV were obliged to investigate the matter and consider LBM as a vector for the increase in HAV in Scotland. Seafish engaged in conversations aimed at refocusing on the evidence that greater risk lay with certain meat products.

The EUFSA have called for a 'baseline survey' to be carried out to determine the levels of Norovirus (NOV) present in classified harvesting grounds. This required a highly technical set of documents setting out the mandate and proposed protocol for the development of the survey.

This included options for a member state to include additional pathogens as required. For some time it appeared as if our own appropriate authorities would include Hepatitis A (HAV) and HEV in the work package. A series of discussions took place that resulted in the eventual declaration that the nations of the UK would not be including these two viruses in the baseline survey.

In March 2016 the requirements for the guidance values for E.coli in shellfish protected areas from the Shellfish Waters Directive were put into the directions of the Water Framework Directive, however protection against further deterioration was not included. We worked to get a clause in the UK legislation and now need to be involved in a series of negotiations on the detail of what 'no deterioration' actually means in practice. However, although there is still work to be done, getting the clause into UK legislation is a great achievement in itself.





PROGRAMME

Strategic Investment Fund

WORK PROGRAMME OVERALL KPI

100% of supported initiatives demonstrably align with Seafish Corporate Plan outcomes.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- Establish the SIF as a recognised source of funding for innovative action in support of the UK seafood industry.
- Communicate effectively to position and consolidate the identity of SIF.
- Utilise the first year's budget appropriately with all supported initiatives aligned to the Corporate Plan.

PROJECT

STRATEGIC INVESTMENT FUND

Establish the fund with all associated processes and values

STRATEGIC INVESTMENT FUND

Advertise, shortlist, select and contract appropriate applicants within the fund's budget

DELIVERY ON TARGETS 2015-2016

The scheme has been established and advertised, high level of oversubscription demonstrates its recognition by the intended users.

Recognised by Defra, our Panels and the wider industry as an appropriate vehicle for funding seafood research and development.

Full uptake of this year's budget and various commitments through to 2017/18. All approved work has been thoroughly assessed for alignment with CP objectives.

Evaluation methods devised to determine value for money for individual projects and the programme as a whole.

Strategic Investment Fund

An 'admin lite' operating procedure was devised for the programme. This minimises the amount of Seafish staff time and costs required to assess applications, award contracts and monitor progress and outputs whilst maintaining all due financial and administrative diligence.

A total of 16 contracts have been awarded varying in duration from 6-30 months. Each phase of the approval process – shortlisting and final approval – was turned around in less than three weeks.

The overall level of matched funding achieved to date, in monetary terms is over 50%. A substantial level of 'in kind' contributions has also been committed. Funding is also being used to leverage further funds, for example from EMFF, by way of feasibility studies.

Among other things the portfolio will deliver new science on which to base improved fishery management, fisher:science programmes, food safety, increased shelf life of chilled seafood, education and awareness (and fun!) for young people, increased uptake of underutilised species and increased consumer confidence in the supply chain. Every sector of the UK seafood industry should benefit from the outputs of this programme.





PROGRAMME

Horizon Scanning & Long Term Issues

The goal of horizon scanning is to provide evidence about future trends that could impact on the seafood industry. The information enables levy-payers to analyse if they are adequately prepared for potential opportunities and threats.

WORK PROGRAMME OVERALL KPI

Industry has a greater awareness of long term issues, measured by testimonials and regular stakeholder survey.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

Identification of priorities and the production of a minimum of two full reports.

PROJECT

ESTABLISH HORIZON SCANNING STEERING GROUP

DELIVERY ON TARGETS 2015-2016

Three meetings of the HSLT steering group were held. The first meeting, held at the outset, focussed on shaping the work programme. The second was a mid-year meeting concerned with reviewing progress and overall direction. The third and final meeting of the year reviewed the outputs and provided recommendations to the Seafish Board.

AGREE PRIORITIES FOR IN-DEPTH RESEARCH WITH PANELS

- Seafood industry risks were captured in a series of horizon risk maps. These risks were then validated with industry and then 'heat mapped'.
- Priority risks for 2015 requiring in-depth review and analysis were agreed with the Seafish Board.

COMPLETE IN-DEPTH ANALYSIS AND REPORT PRODUCTION FOR MINIMUM OF TWO ISSUES

Two legacy reviews were produced focussing on food security in UK seafood, and climate change adaptation in UK wild capture seafood. These were then circulated to all levy payers.

Four priority risk reviews were produced. These focussed on export trades, product integrity, fish as food (UK consumption), and the next NGO issue. These were delivered in draft for consideration by the Seafish panels and Board.

Horizon risk mapping 2015/16

Over the course of 2015, the seafood horizon has been swept to identify existing and emerging risks to industry. This began with the Horizon Scanning steering group members (February 2015), resulting in over 28 big issues being identified. Subsequently input was obtained from all three Seafish panels (March 2015), Seafish Science Advisory Group (November 2015), and Seafish staff (April-December 2015).

Members were asked to input into this horizon scanning by providing their suggestions on big issues of long term concern for the industry. The intention was not to be too prescriptive in order to keep the field of view wide open. The following guidelines applied:

- All issues had to impact on the UK seafood industry in order for them to be considered.
- A 10 year time frame for issues (however, if stakeholders felt strongly about an issue on a 20 year time frame, this could be included).

Over the period, horizon sweeping identified over 190 risk items. This input was to contribute to mapping the risk landscape.

Risks were grouped into six key 'risk families' with a series of risk maps produced to represent them. To ensure industry responded to priority risks, these risks were 'heat-mapped'. For each risk item, this was done by asking two questions:

1. How likely is the risk? (weak, medium, or strong signal)
2. How impactful is the risk for industry?
(low, medium, or high impact)

Whilst Seafish could assess likelihood (the first question), industry was felt to be best placed to assess risk impact (the second question). With valuable feedback from the Seafish panels a number of priority risk areas were identified (more likely, higher impact risks). These priority risk areas can now be considered for in-depth review to identify forward pathways for industry and Seafish to respond.

“This work output has put in place some valuable architecture; it should prove useful to businesses of any size and particularly valuable to mid-sized companies that may not have the capacity or capability to do this type of work themselves.”

Mike Mitchell, Technical & CSR Advisor to Young's Seafood.









Contact us

We regularly request feedback on our work and encourage the contributions of all stakeholders.

Contact us through the following channels:

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