

# Minutes of the Seafish Wales Advisory Committee Meeting

Held virtually on Tuesday 17 May 2022

## Attendees:

<b>Members</b>	Jon Parker, Camnesa (Chair) Julie Hill, Lobster Pot Richard Williams, Ocean Bay Shellfish Andy Woolmer, Atlantic Edge Oysters Jim Evans, Welsh Fishermen's Association Trevor Jones, Bangor Mussels Producers John Penaluna, National Federation of Fish Friers Natalie Hold, Bangor University
<b>Observers</b>	Bethan Jones, Welsh Government Lisa Roberts-Clarke, Welsh Government
<b>Seafish</b>	Marcus Coleman, Chief Executive Officer Lynn Gilmore, Director of Communications and Engagement Hannah Thompson, Head of International Trade & Regions (West) Noemi Donigiewicz, Regional Manager – Wales Arina Motova, Head of Economics (in part)
<b>Minutes</b>	Phillip Quirie, Project Co-ordinator and Administrator
<b>Apologies</b>	Colin Charman, Natural Resource Wales Paul Howes, Swansea University Gareth Bevington, Welsh Government Lewis Le Vay, Bangor University

## 1 Welcome and apologies

- 1.1 The Chair welcomed everyone to the meeting.
- 1.2 Apologies were shared on behalf of Colin, Paul, Gareth, and Lewis.

## 2 Minutes of the previous meeting, held on 14 October 2021

- 2.1 The Chair invited feedback on the draft minutes. The minutes were approved as an accurate record of the meeting.

**ACTION 01: Phillip will upload the approved minutes of the October 2021 meeting to the Seafish website.**

## 3 Actions from previous meeting

- 3.1 The Chair confirmed that all actions from the previous meeting were complete.

#### 4 **Roundtable updates and horizons**

4.1 The Chair invited each member to provide an update on any challenges and opportunities from their sector.

4.2 Julie Hill reported that they have enjoyed a productive time recently:

- Attended Seafood Expo Global in Barcelona, which was a success – it was valuable to see customers, suppliers, and Seafish, as well as gather useful market intelligence. Trade with a couple of new markets were confirmed during the expo.
- Attended the SAGB conference, which was another welcome return to a face-to-face environment.
- The Lobster Pot won Exporter of the Year at the Wales Food and Drink Awards, up against stiff competition – two other seafood companies were in the finals of other categories.
- However, they remain hugely affected by the air freight issues to China, and the conflict in Ukraine is impacting air freight costs across Europe.
- Sourcing crab is difficult, and their Scarborough vessel is currently tied-up due to poor fishing.
- Little progress has been made on measuring carbon footprint.
- Discussions have taken place with Lewis Tattersall from Seafish about a potential collaboration between industry, academia, and Seafish on sustainability.

4.3 Andy Woolmer:

- Recently pushed forward the marketing of oysters, targeting high-end restaurants to return a higher price per unit on a low volume species. Interest has come from restaurants in Cardiff, Bristol, and London.
- Recruited an apprentice through the Seafish apprenticeship scheme, which has worked well thus far, but would like to speak to Seafish about how to progress the apprenticeship further and continue training.

#### **ACTION 02: Noemi will arrange a discussion with Andy to progress the Seafish apprenticeship.**

- An application was submitted to the Seafood Fund for collaborative work on oysters.
- The primary challenge is the potential for imported oysters into the UK market – this would have an adverse effect on domestic oyster producers.

4.4 John Penaluna:

- A notable increase in visitor numbers in North Wales has led to an increase in fish and chip consumption.
- Whitefish prices have increased by around 40%, which is being passed on to the consumer with very little resistance – there seems to be an understanding from consumers.
- However, it's thought the conflict in Ukraine will affect the sector in the future when cooking oils and fertilizers will present a supply and cost challenge for foodservice.

4.5 Trevor Jones:

- Recently noticed that there is more recognition of the negative impacts of the exit from the EU and said certain quarters of the Western IFCA would like to see Seafish take a more political stance on the adverse effects of the EU-exit. Industry is in decline and not placed to tackle all the challenges, but he suggested Seafish may be better placed to voice concerns. Marcus explained that as a NDPB Seafish cannot lobby Government on behalf of industry, however we will continue to provide Government with as much data and insight as is available to inform decision-making, and to assist industry with the provision of data to support areas of concern.
- In terms of fishing safety, Trevor noted that the poor high-level communication from the MCA is affecting fishing safety progress in Wales.

4.6 Jim Evans:

- There are major concerns and issues about fuel prices and food security in Wales.

- The fishing federations recently met with UK Fisheries Minister, Victoria Prentis, to discuss some of the issues on a pan-UK level, however it was felt by industry that the Minister was more concerned with the whitefish supply shortfall resulting from the war in Ukraine – this, in turn, could affect the supply chain in Wales. A letter has since been written to the Welsh Minister outlining the potential impacts on the Welsh seafood industry.
- The increased cost of fuel will impact large and small operators equally – pots, equipment, ancillary gear is all going up in price, along with the cost of living. But catchers have no way of passing the increased costs on to their customers.
- The MSC pre-assessments of all commercially important fishing stocks in Wales are now complete and can be shared with members via the secretariat.

**ACTION 03: Jim will provide Phillip with the MSC pre-assessments report to circulate to SWAC members.**

- There is an opportunity to reassess the Wales seafood industry – gather data on all fishing sectors to establish a forward way of thinking and working.
- The relationship with the MCA is tense at the moment, due to their reluctance to move from their position on vessel inspections and spot-checks or discuss the issues arising – there is an ongoing issue with a lack of engagement within Wales.
- Due to the rapid development of floating offshore wind farms and increased Marine Protected Areas, spatial squeeze is a growing concern around Wales.
- Replacement EMFF schemes haven't yet come to fruition and discussions on how it might translate on a Welsh level are in very early stages.

**5 Welsh Government update**

**5.1 Bethan provided a verbal summary of recent fisheries activity within Welsh Government:**

- Work has gone into replacing the stakeholder engagement group and more concrete details will be available before the end of July.
- Wales has become the first devolved administration to have mandatory iVMS systems, and there has been no negative response to date.
- The Menai Strait Oyster and Mussel Fishery Order was implemented earlier this year and a cockle management consultation is ongoing – SWAC members were invited to submit any opinions to feed into the consultation.
- 2022 quota opportunities will be announced in due course by the Secretary of State – various industry sectors will be subject to quota shares.
- Dubai Expo took place between October 2021 and March 2022 – Julie Hill represented Wales in Dubai, and feedback has been very positive.
- There was a Wales stand at Seafood Expo Global in Barcelona, which was considered a great success and thoughts are now turning to the event in 2023.
- The Joint Fisheries Statement consultation ended on 12 April – all input is currently being assessed.
- Fisheries management plans are starting to be developed – any future updates will be shared with the committee.
- Welsh Government are regularly pressing Defra to discuss at a diplomatic level the issues regarding live bi-valve molluscs.
- The EMFF successor scheme is still in development and in consultation with industry – it is expected there will be £6.2m of funding available over three years.

A discussion then followed about the EMFF successor scheme. The Chair reported that he and Jim Evans are on the development group for future fisheries funding and said it's unclear how the money will be

allocated, but he said it's important to have parity with devolved counterparts with regards to level of funding intervention are available to industry – for example 80% in England compared to 50% in Wales for identical schemes or projects has created issues in the past. These intricacies are being worked through via group discussions. Jim added that this isn't a replacement for EMFF, and some may be better equipped than others to access the funds – which could discourage people from applying. Julie Hill reported that the EMFF application procedure presented many lengthy administrative challenges sometimes resulting in the process affecting the ability to deliver the project effectively due to delays.

## 6 **Seafish Executive update**

- 6.1 Lynn Gilmore provided an outline of recent pan-UK work that is of relevance to the Welsh industry and SWAC (Attachment: *SWAC 170522 Seafish update, pages 2-8*). In summary, Seafish work included:
- Seafish Annual Plan 2022-23 was signed off by the Board in March, and the work programme in Wales supports the 5 core challenges outlined in the Corporate Plan (changing landscape, promoting consumption, a safe and skilled workforce, ensuring sustainable supply, and deep insight).
  - Fisheries management work – working with industry and government on numerous initiatives to protect fish and shellfish stocks for future generations.
  - End of life fishing gear work is ongoing, with the creation of the UK Gear Forum and a new policy steering group.
  - Seafish are developing tools and resources to support the seafood industry response to climate change. Seafish hosts two webpages: [climate change and the seafood industry](#) and [climate change impacts and adaptation](#).
  - Seafish have two key pieces of work promoting UK seafood in markets around the globe, through an international marketing toolkit and hosting a UK pavilion at Seafood Expo Global in Barcelona in April.
- 6.2 Hannah Thompson then gave an overview of the UK pavilion at Seafood Expo Global (Attachment: *SWAC 170522 Seafish update, pages 9-12*). Seafish partnered with Defra and DIT to create a UK pavilion at SEG for the first time, driven by industry demand for a cohesive UK presence in the European arena. The pavilion featured a dedicated exhibition area for UK companies to hire branded booths for the duration of the show, a chef demonstration and sampling area, and a communal lounge and reception area for visiting UK companies to meet clients. The pavilion and facilities were busy throughout the show, and all the exhibiting companies have confirmed participation in the pavilion in 2023. The majority of UK companies who visited the stand also indicated a strong desire to exhibit next year.
- 6.3 Julie commented that future collaboration at SEG between Seafish and the Wales pavilion will be beneficial for all parties but expressed the importance of the Wales stand maintaining its own distinct identity.

## 7 **Seafish Wales Manager update**

- 7.1 Noemi presented an overview of recent Seafish workstream activity in Wales (Attachment: *SWAC 170522 Seafish update, pages 13-20*). Noemi also outlined the general progress she has made since starting the role in November 2021, which has included learning about the Seafish offering to industry, regular stakeholder engagement, playing an active role in networks, sign-posting Wales stakeholders to other Seafish services, maintaining the Wales economic dashboard, finalising the safety project and planning future work.
- 7.2 The Chair elaborated on the Cross-Party Group which will provide a forum for fisheries and aquaculture to share knowledge and bring about a better understanding of the sector – members will be contacted to provide input to this forum.

## 8 Crustacean welfare update

- 8.1 A pre-recorded presentation by Oscar Wilkie from Seafish was played to the committee, outlining the recent work on sentience and welfare of decapod crustacea and cephalopod molluscs, which concluded through behavioural and physiological data from a broad range of experiments undertaken on a number of species, that there is very strong evidence of sentience in octopus and strong evidence of sentience in crabs, lobsters, squid, and cuttlefish. Following publication of this work, Defra tabled an amendment to animal welfare legislation: the Animal Welfare (Sentience) Bill, recognising decapod crustaceans and cephalopod molluscs as sentient beings in Government decision-making. Seafish will be working to create best practice guidance for industry. An independent researcher has been appointed to conduct a feasibility study to establish different options available and how each of these could work in practice and be of benefit to industry.

Members with any questions can contact Oscar directly: [Oscar.wilkie@seafish.co.uk](mailto:Oscar.wilkie@seafish.co.uk)

## 9 Impact of Russia-Ukraine conflict on the UK seafood industry

- 9.1 Arina Motova provided an overview of the impact of the war in Ukraine is having on the UK seafood industry (Attachment: *SWAC 170522 Ukraine-Russia conflict impacts, pages 1-10*). She explained that all the main parts of the supply chain can expect to be affected, as over 30% of whitefish imported originates from Russia.

Seafish have [this dedicated page](#) on their website which provides an overview of the impact on the UK seafood industry.

- 9.2 Arina then briefly outlined the landings and economic performance data for the Welsh fleet (Attachment: *SWAC 170522 Ukraine-Russia conflict impacts, pages 11-16*). There is an overall reduction in Welsh fleet landings and landings in Wales of all species, which is mirrored across the UK since 2016. It was confirmed that the data includes only those vessels with effort and revenue recorded, and some of the vessels on the vessel registry will include inactive vessels. The Chair noted that although the number of active vessels has decreased, the value of landings has remained consistent.

## 10 Update on feasibility studies

- 10.1 Jim provided a verbal summary of the recent feasibility studies, and a report will be available in the coming weeks. He outlined some key points from the results and agreed to make the full report available to members when published:

- The new entrant scheme was driven by the high average age of Welsh crew and skippers – mostly 40-65 years, meaning 43% of the current workforce will have retired in the next 20 years. The scheme will look to establish attractive career options for new recruits.
- The study assessed the demand for jobs in fishing/seafood along with the job supply, and 18 port visits were carried out to capture detail beyond economic surveys.
- It was established that the crab, lobster, whelk, and scallop sectors are they key sectors requiring assistance with recruitment – especially the whelk sector.

**ACTION 04: Jim will provide Phillip with the feasibility study report to circulate to SWAC members when published.**

## 11 Update on Strategic Review and discussion on future direction of Seafish

Marcus Coleman presented an update on the Seafish Strategic Review (Attachment: *Seafish Strategic Review update May 2022*), outlining what the review is, why it took place, and the primary outcomes.

## 12 Any other business

12.1 The Chair gave members the opportunity to raise any other business.

12.2 Jim asked what the purpose of the committee is without being linked to the Wales seafood strategy and felt the work undertaken by SWAC must be led by a strategy. The Chair explained that the previous Wales strategy had no clear ownership and that it was not the role of the Seafish to lead on a strategy. The work of Seafish is guided by the Seafish Corporate Plan which has been created in consultation with industry and SWAC helps to ensure the Seafish work programme in Wales supports the needs of industry.

## 13 Date of next meeting and close

13.1 The Chair thanked everyone for their attendance and participation and asked Seafish to arrange the next meeting in early November.

**ACTION 05: Phillip will arrange the next meeting in early November 2022.**

No.	Action List	Timeline (Status)	Owner
1.	Phillip will upload the approved minutes of the October 2021 meeting to the Seafish website.	June	Phillip
2.	Noemi will arrange a discussion with Andy to progress the Seafish apprenticeship.	June	Phillip
3.	Jim will provide Phillip with the MSC pre-assessments report to circulate to SWAC members.	When report is available	Jim and Phillip
4.	Jim will provide Phillip with the feasibility study report to circulate to SWAC members when published.	When report is available	Jim and Phillip
5.	Phillip will arrange the next meeting in early November 2022.	November	Phillip