

Seafood Industry Leadership Group Meeting Minutes – 28 May 2020

In Attendance

Neil Auchterlonie, Chair (NA)	Ally Dingwall, Sainsbury's (AD)
Kim Cullen, Secretary (KC)	Hazel Curtis, Seafish (HC)
Nigel Edwards, Hilton Food Group (NE)	Cameron Moffat, Young Seafood Leaders (CM)
Dr Mark Berry, SEP Chair (MB)	Nicola Robinson, Defra (NR)
Stuart Price, Nomad Foods (SP)	Nathan de Rozarieux, Falfish (NdR)
James Fox Davies, Fowey Sea Farms, ALG Chair (JFD)	

Guest

Lydia Osborne, Defra (LO)

Absent

Andrew Locker, Lockers Trawlers	Paul Trebilcock, CFPO
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Meeting Minutes

1. Welcome

- NA welcomed SILG members to the first meeting since the COVID-19 crisis and he became Chair of SF2040
- NA stated that it is an important time for SILG and SF2040, in relation to Brexit and C-19, with many challenges for the industry
- SF2040 had lost some momentum between Chair appointments, and it was agreed that SILG meetings will occur monthly over Zoom for the foreseeable future in order to make up some time, and in particular to devote some work to the Recommendations Refresh exercise, which is a priority for SILG
- The other pressing priority is to secure funding in the short term:
 - The situation at present is that SF2040 is funded until the end of Sept 2020
 - It is imperative that funding is in place for short-, medium-, and long-term activities. SF2040 has been working on a plan for this: In the short-term, there are unused funds available in the budget and Kim has requested an extension of the current funding to Feb 2021. This will support activities in the immediate future.
 - In the medium-term, the plan is to apply for one year of funding in Jan 2021 under the UK government's replacement scheme for the European Maritime Fisheries Fund (EMFF). Once we have the detail of how that scheme will operate, we shall start working on this application.
 - Following that, the longer-term plan is (during 2021) to look at possible new opportunities and sources of funds across public and private sectors to secure a more stable future for the programme.

SILG agreed to meet two hours a month throughout summer to maintain momentum during this critical time.

Conflicts of Interest

- Before taking forward the items on the agenda, NA invited SILG members to announce any conflicts of interests: No conflicts of interest were raised.

2. 30 Jan Minutes

- SILG accepted the minutes of the previous meeting without amendment

For future meetings, the process to approve the minutes will change to permit review and comment by SILG members prior to upload onto the SF2040 webpage:

- Minutes will be emailed to SILG with the agenda and papers in advance of the following meeting
- SILG will be asked to approve or comment on the minutes at the next meeting
- Upon approval, the minutes will be released on the SF2040 webpage on the Seafish website
- When SILG resumes physical meetings at reduced frequency, minutes will be approved via email

3. Update from Aquaculture Leadership Group (ALG) Chair

JFD provided the update

Highlights

12 February ALG meeting

- *'Size of the Aquaculture Prize'* report
 - Project began Dec 2019. Aim of study is to highlight the growth potential for bivalve aquaculture in the UK. To achieve this, the study will consider relevant literature and engage with key stakeholders
- Defra aquaculture update
 - Regulatory framework
 - Initial focus on the regulation of marine shellfish aquaculture for new and expanding businesses through a phased approach
 - Phase 1: clarify the existing complex process
 - Phase 2: identify opportunities to streamline the existing process and better align regulators
 - Initial output: a multi-year roadmap for regulatory improvement
 - Pacific oyster policy
 - Looked at legislation, regulation, policy and evidence relating to Pacific oysters thus aligning Defra aquaculture policy with UK's approach to non-native species
 - Now working to clarify new Pacific Oyster aquaculture in areas where the species is already present in the wild. Policy to be delivered summer 2020
- Cefas/Dorset & East Devon Aquaculture Mapping Project
 - Purpose of project:
 - Identify and map areas best-suited to specific types of sustainable aquaculture, within the boundaries of the Dorset and East Devon area
 - Produce an in-depth analysis which should benefit aquaculture interests in the FLAG area and act as an exemplar approach for others to adopt

- Project could lead to a national strategic aquaculture map for England and be carried forward across the country. MMO, Cefas, and ALG keen to continue the conversation
- English Aquaculture Strategy (EAS)
 - MMO-EMFF approved a budget of £24,950 to pay for the development of EAS
 - An Invitation to Tender was released in March. Poseidon was awarded the contract
 - The highly consultative process includes Defra, regulators, Seafish and industry
 - Work has commenced and the Strategy will be presented at the September SILG meeting
 - ALG’s priorities for the EAS scope:

Priority	EAS Scope
1	Barriers to growth (water quality, regulatory framework, poor consumer demand, etc)
2	Food security - moving aquaculture from an export to a domestic market (this ties in to needing a stronger consumer demand)
3	Technology/innovation – new species and techniques
4	Promotion of aquaculture
5	Jobs/skills/social aspect of aquaculture – the knock-on social and economic benefits of aquaculture

General Comments

- SILG members asked:
 - Will the strategy include warm water prawns?
 - Response: Yes
 - Will there be an inclusion of potential designated aquaculture zones?
 - Response: Yes
- Important to ensure the message that aquaculture is food is not lost in EAS

4. Update from the Seafish Expert Panel (SEP) Chair

MB provided the SEP Update, providing a review of the SEP objectives and recent activities.

Highlights

December 2019 SEP meeting

- Discussion on SEP membership
 - Intention to broaden and diversify team by adding experts in communications and marketing, and inviting members from the Young Seafood Leaders Network
- SEP advised that climate-related advantages of seafood could be more widely communicated
- The Chief Economist of Seafish presented on ‘Valuing the UK Seafood Industry’
 - Objective is to determine the value post-Brexit when competing for off-shore space/funding; uses financial capital plus five other dimensions to get at an overall value

General Comments

- SILG members were interested in seeing the presentation ‘Valuing the UK Seafood Industry’
- The Lancet team have conducted further work on seafood because their Lancet/EAT report didn’t elaborate on seafood. Nigel emailed the link to the report, which was published January 2019
 - https://eatforum.org/content/uploads/2019/11/Seafood_Scoping_Report_EAT-Lancet.pdf

Action Points

- Kim will speak further with the Seafish Chief Economist to access the presentation as well as discuss a future discussion at a SILG meeting

5. Update from Defra

NR provided the Defra update.

Highlights

- At some point SILG should meet the new Fisheries Minister, Victoria Prentis, MP
- Fisheries Bill is currently in the House of Lords
- EU/UK negotiations
 - Fisheries negotiations going on remotely; it is challenging
 - The EU wants to maintain the status quo but that of course was not the point of Brexit
- COVID-19
 - Defra has been working on a financial scheme for the aquaculture sector and this has generated a great deal of data and improved understanding about the sector
 - Reaction to the scheme has been fairly positive
- Two reports coming out
 - Future of Inshore Fisheries
 - Richard Benyon's independent review of the Highly Protected Marine Areas

Action Points

- KC to email reports to SILG when available

6. Update from Seafish

HC provided the Seafish update.

Highlights

- Seafish has been offering practical support and advice during the COVID-19 crisis, e.g.:
 - Guidance on direct sales
 - Development, register, and distribution of a Key Worker Certificate
- Seafish has partnered with Defra to run a consumer awareness campaign for domestic species
- There has been an expected drop in levy as a result of COVID-19 which is how Seafish is funded
- The export market is slowly re-opening in some areas but overall it is a substantially difficult situation

General Comments

- SILG agreed that the public bodies response to support England and the wider UK's seafood industry has been impressive
- SILG asked with the reduction in collection of levy how is that going to impact on Seafish

- Response: As a public body Seafish must have a certain amount of money in the bank and as a result the NPDB has the reserves. There is no imminent risk however the organisation will have to prioritise work. The Executive and Board are actively reviewing the situation.

7. 10 minute break

8. Update from SF2040 Secretariat

KC provided the update

Highlights

- Research and strategy projects
 - Rec 6: *The estimated socioeconomic impacts of increased seafood consumption on population health and government budgets*
 - The research is complete and the outputs final report were submitted
 - The benefits may not arise immediately and are only expected to accrue in the near future. This study assumes a 10-year timeframe for the benefits to arise
 - The economic benefits from the number of preventable cases as a result of increasing seafood consumption to 2 portions a week across England is estimated to exceed £24m/week or £1.3 bn per year under the most conservative approach
 - Rec 16: *The identification of the challenges facing England's seafood industry in skills, training, recruitment and retention*
 - 288 fishers, aquaculture farmers, fishmongers, processors and fish fryers participated in online and telephone surveys and 30 in-depth interviews were conducted
 - The final report outlining challenges pre Covid-19 and as a result of Covid-19, as well solutions, and an analysis of comparable European countries due June 2020
- Refresh process of the SF2040 recommendations
 - The refresh process was postponed in March as per an agreement with Seafish and Defra due to Covid-19's immediate impact. The process has been revised with new dates
 - Anne Freeman, Defra, indicated that SF2040 is a vehicle to pull things together and can play a critical role in supporting the recovery of England's seafood industry from Covid-19
- Future funding for SF2040 programme
 - A Notification of Change was submitted to MMO-EMFF to extend the programme from September 2020 to February 2021 and to move unspent funds in the Meetings/Travel Costs to the Project Manager and Chair Costs to cover those salaries during the extension
 - In the long-term there will be an application for the EMFF replacement scheme which is scheduled to be open 1 January 2021
 - Opportunity for industry investment is another angle the Secretariat is considering

Action points

- KC to invite SILG to final presentation of Rec 16 results

9. **Rec 6: The socioeconomic impacts of increased seafood consumption on Govt budgets and pop health**
Representatives of the contractor, Risk & Policy Analysts, provided a presentation on the project and its findings.

Assumptions

- Increased seafood consumption means reduced meat consumption (seafood is substitution)
 - People will reduce their meat and replace with fish – can't be 100% sure of effect though
 - Food is complicated to research – many variables; must be clear with the assumptions when discussing the research

Literature Review

- University of East Anglia conducted the lit review and developed search criteria
 - English language only reports from 2008-2019
 - Studies looking at different diets such as replacing meat with seafood
 - Looking specifically at health outcomes (e.g. cancer and Type 2 diabetes)
 - Most of the data came from studies that divided people into cohorts such as regular meat-eater, low meat-eaters, vegetarian and pescatarian
 - Studies provided breakdown of quantities of consumption
 - Unable to get the raw data in the studies – used information from Methodology sections
 - There was a lower risk of developing cancer in pescatarians than vegetarians

Research Question

- There was a specific research question: what happens when you increase fish consumption; the quantification of increase seafood consumption, i.e. from near one portion per week, to two portions a week
- There was some discussion around the research question and the level of evidence attached to cardio-vascular disease (CVD), and it was proposed that the strength of association of an increased consumption from one portion to two, may have reduced the data returns related to CVD specifically
- RPA was driven by availability of data. They could only monetise health outcomes (e.g. lung and ovarian cancers, and Type 2 diabetes) that had data – other cancers could not be specifically quantified in terms of economic benefits because there wasn't enough data. However it is feasible to state that increased seafood consumption in general will reduce overall cancer rates

General Comments

- The findings are important and useful in providing some figures for societal benefits attached to increased seafood consumption
- It isn't the whole story, though, and cardiovascular health, linked to omega-3 consumption, is absent from this report. SF0240 and SILG need to be clear with the messages as, although the monetary benefits are significant, as they are portrayed in the work they are not the full story of the health improvements

- Table A:5 in final report lists the studies selected and the corresponding Hazard Ratios that fed into the model to develop the monetary estimates
- Report has some compelling numbers and is shouting that seafood consumption is very important at a time when the industry is really struggling – this is very positive
- Report is for seafood marketing opportunities and can inform other SF2040 marketing recs
- There is a bigger discussion to be had – whether SILG itself should be doing something with these findings or make the findings available
 - SILG needs to have further in depth discussion on what to do with this research
 - It will inform the recommendations refresh exercise, and there may be more work to be done
 - There are a lot of complexities here to consider. Does this research build on others?
 - What does SILG want to achieve with this research?
 - SILG needs to tease out key audiences and key messages; range of monetary benefits isn't the whole picture
 - Discuss what to do with the report at the next SILG meeting (25 June)

10. Any other business

None were raised.