



2016-2017
**Delivery
Report**

SEAFISH
the authority on seafood



Welcome from our Chief Executive

At Seafish, everything we do is geared towards supporting the UK Seafood industry, in its many constituent parts, to put more seafood on the plate of UK consumers. This 2016-17 Delivery Report provides a showcase for the support we provide. As you will see, our work is diverse and, of course, valued by our stakeholders. Whether your interests lie, for example, in the marketing and trade of seafood products, in ensuring product quality and integrity or in up-skilling the next generation of fishermen or those interested in onshore careers, Seafish has something for you.

I would very much encourage you and your organisations to get involved in Seafish activities. After all, the value of Seafish's work lies in our ability to work collaboratively on the real issues that matter to us all. The Seafish industry issue groups bring stakeholders together to explore, debate and seek solutions across a range of subject areas. The groups are very much the

'engine room' of Seafish, helping shape and drive much of the work we do. Please get involved. Alternatively, please ensure that your organisation is plugged into the information services we provide; our Market Insight service, Regulation Updates, Kingfisher at-Sea Safety Information and Economics reports are all freely available and just a few 'clicks' away on the Seafish website.

Our seafood marketing initiatives continue to be a success with significant sales increases resulting from our collective industry efforts under the colourful banner of 'Seafood Week' and our latest 'Fish 2 a week' campaign. Just think, if everyone in the UK ate two portions of fish per week this could contribute to a £8 billion increase in annual sales! Now that's not just good for business, but good for the nation's health, our fishing communities and the environment too. Is it too much to dream that we may one day see that happen!?



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 consumer led marketing initiatives targeting key audience segments.

WORK PROGRAMME OVERALL KPI

Campaigns demonstrate a positive impact on seafood consumption – reported annually.

WORK PROGRAMME ANNUAL TARGET FOR 2016-17

- 10% growth in Fish is the Dish digital audience.
- Consumer uplift across all KPIs.
- Fish and chips work shows a 10% uplift in industry engagement.

PROJECT

FISH IS THE DISH

Digital Engagement.

Our year-round digital platform providing consumers with everything they need to know about buying, cooking and eating seafood.

SUPERFISHOIL HEALTH

Our health campaigns help deliver the 2 a week message.

SEAFOOD WEEK

A national week of promotion and engagement around seafood in the UK.

FISH AND CHIPS

Consumer and industry focused project promoting the UK's favourite fish dish.

DELIVERY ON TARGETS 2016-2017

- Fish is the Dish has continued to provide a positive channel to encourage more people to eat more fish more often.
- The website achieved over one million page views from 341,000 unique users.
- The digital reach of our consumer work through social media grew up to 55% for the year.
- Clever packaging of consumer-centred content which follows a comprehensive conversational calendar ensures positive results for this work.

- Our Summer Superfishoil campaign achieved PR exclusives in the Mail Online and Daily Express, reaching over 273 million consumers.
- The campaign was reprofiled to reintroduce the '2 a week' message for industry. A short February / March campaign in Winter 2016 achieved great success across a range of campaign measures including PR and digital.
- The Fish 2 a week campaign positively impacted consumer awareness of the recommended number of portions of fish people should eat in a week from 20% in December 2016 to 28% in March 2017. This is a key indicator of our success for our health work.

The second year of the reintroduced Seafood Week brought fantastic results with six new major stakeholders across retail and foodservice taking part. Key marketing and communications results include:

- 71% increase in media figures from 76 to 130 million.
- 56% increase in social media impressions from 54 to 86 million.
- 58% increase in industry using toolkit from 1,525 to 2,409.
- 3% increase in sales for all seafood for the week

*(Neilson - doesn't include foodservice or discounters.)

This year's National Fish & Chip Awards saw an uplift across all reporting areas. Results include:

- 1,200 pieces of coverage.
- Total media reach: 2.5 billion people (+44% on 2016).
- 100,000 stakeholders reached for every £1 spent (+44% on 2016).

2016/17 saw us again support National Fish and Chip Day with excellent results. Our 'Enjoy Fish and Chips' brand was launched as part of our Nutritional Project and will continue to evolve in 2017/18.

PROMOTE CONSUMPTION:
SEAFISH CAMPAIGNS**National Fish & Chip Awards 2017**

"Business is booming – we've seen a huge upturn in trade this year, mainly due to our success in last year's National Fish & Chip Awards."

Colin Cromar, Cromars Fish and Chips, St Andrews, Fife

The National Fish & Chip Awards aim to support the wider fish frying trade in their effort to maintain their share of the quick service / takeaway / fast food market. The awards seek to:

- Reward individual excellence in a range of different award categories.
- Raise quality standards and provide a benchmark for businesses to aspire to - performance feedback is provided to all entrants.
- Provide a robust platform from which to undertake a wide variety of media activity promoting the sector and its many diverse facets, and to encourage the continued consumption of fish and chips amongst the UK population.
- Provide an opportunity for wider industry networking and partnership working.

A rolling programme of media releases and results announcements for the various award categories is undertaken during the awards year – distributed to a wide variety of regional and national consumer media and respective trade media. In addition, various bespoke media activity projects are

undertaken with a mix of trade and consumer media channels, all endeavouring to pitch both the awards and the wider world of fish and chips in a positive light.

Topline media activity results for the 2017 National Fish & Chip Awards include:

- 1,200 pieces of coverage.
- 99% positive tone of voice.
- Print reach: 31.5 million people.
- Online reach: 2.4 billion people.
- Broadcast reach: 92.2 million people.
- Total reach: 2.5 billion people (+44% on 2016).
- 100,000 stakeholders reached for every £1 spent (+44% on 2016).

Usage figures for the bespoke website for the award program for the period beginning of March 2016 to February 2017 were:

- Unique visitors 149,748 (up 23.82% from the same period in 2015/16).
- Page views 661,659 (up 24.42% from the same period in 2015/16).





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<p>Promote Consumption: Industry Support</p> <p>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.</p>	<p>INDUSTRY CAMPAIGN TOOLKITS</p> <p>Enabling industry to get involved in the Seafish-driven consumer campaigns.</p>	<ul style="list-style-type: none"> 58% uplift of Seafood Week toolkit access, supported by hardcopy dissemination and online provision from 1,525 to 2,409. 26% increase on seafood businesses on the Seafood Week map from 302 to 383. 600 toolkits distributed for the Fish 2 a week health campaign introductory phase.
	<p>SEAFISH ASSET BANK</p> <p>Our online resource that allows industry access to a range of digital assets.</p>	<ul style="list-style-type: none"> 43% increase of Asset Bank users from 515 in 15/16 to 735 in 16/17. 68% increase in assets held from 4,798 in 15/16 to 8,050 in 16/17. 30% increase in Asset Bank resources downloaded for Seafood Week from 352 to 458. New assets covering shoots at: two seafood restaurants; two mussel aquaculture businesses; and five ports with under 10m boats. Further assets included: 15 sea fish illustrations; 14 seafood species shots; and a series of ‘iconic’ industry-related images which were uploaded and are being used by industry.
	<p>CONSUMER INSIGHT</p> <p>Utilising market insight to support industry campaigns.</p>	<ul style="list-style-type: none"> Qualitative and quantitative research on consumer behaviour on eating seafood twice a week provided the foundation for the Fish 2 a week winter marketing campaign which has delivered a range of impressive results. The research also informed consumer insight publications and digital engagement. Over 100 key stakeholders participated in industry events in Aberdeen, Shetland and London.
<p>WORK PROGRAMME OVERALL KPI</p> <p>Campaigns demonstrate a positive impact on seafood consumption – reported annually.</p>		
<p>WORK PROGRAMME ANNUAL TARGET FOR 2016-17</p> <p>10% uplift in:</p> <ul style="list-style-type: none"> Toolkit downloads. Asset Bank usage. Consumer insight reach. 		



Consumer Insight that informs our seafood health messaging

Seafish undertook a research project to investigate consumer behaviour with regard to eating the recommended two portions of fish per week. The research covered both quantitative and qualitative methodologies.

Despite three quarters of the UK being worried about their health, the research found that 66% of adults in the UK aren’t eating enough fish. The NHS and health professionals recommend that we eat two portions of fish each week, one of which should be an oily fish, as part of a healthy, balanced diet. This will help to ensure we keep our bodies in good working order and to help maintain a healthy heart.

Although over three quarters of over 45 year olds (76%) worry about their health, only 35% of 45 and overs are eating their minimum two portions of fish a week. Eating the recommended amount of fish is an easy way to begin to improve health and wellbeing.

As a result of the research insight, Seafish evolved the highly successful omega-3 campaign ‘Superfishoil’ to push the message of eating fish twice a week. Launched in February 2017, Fish 2 a week was designed to encourage people to eat two portions of fish a week as a simple change that is a step towards a healthy lifestyle. The campaign is in its infancy but already has the backing of major industry stakeholders and will evolve through time with feedback and thorough evaluation. If everyone in the UK ate two portions of fish per week this could contribute to an £8 billion increase in annual sales - as well as a healthier population.

Here’s how the Fish 2 a week campaign delivered through the consumer insight:

CAMPAIGN KPI	ACHIEVED
<ul style="list-style-type: none"> An increase in consumer awareness of the health recommendation to eat two portions of fish a week. 	<p>The Fish 2 a week campaign positively changed consumer awareness on the recommended number of portions of fish people should eat in a week from 20% in December 2016 to 28% March 2017 a key indicator of our success for our health work.</p>
<ul style="list-style-type: none"> An increase in positive media coverage of seafood on health. 	<p>188 million reach for PR communications with appearances on television on Sunday Brunch 16 April and Saturday Kitchen scheduled for May 2017.</p>
<ul style="list-style-type: none"> An increase in the variety of content created with a video series added as a means of presenting seafood as a healthy choice. 	<p>Videos were viewed 496,100 times – totally the equivalent of 19 weeks of continuous viewing.</p>



PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<h2>Export Support</h2> <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>	<h3>BRITISH PAVILIONS & INFORMATION STANDS</h3> <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 13 companies. Information stands organised at: Seafood Expo Global, Brussels in April 2016 and Seafood Expo North America, Boston in March 2017. Stands used to promote Seafish services, the UK industry and used by UK visitors to conduct meetings.
<h3>WORK PROGRAMME OVERALL KPI</h3> <p>Year-on-year improvement in stakeholder satisfaction from baseline established in year one survey.</p>	<h3>SEAFOOD BUYER RECEPTIONS</h3> <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 in conjunction with SDI 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. The planned reception at China Fisheries was cancelled on advice from industry. The budget was used to fund a mackerel promotion in Japan in March 2017.
<h3>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</h3> <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. 	<h3>EXPORT GUIDES</h3> <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. 22,782 downloads in 2016 – 10% over target.

EXPORT SUPPORT

Key Highlights

- Seafish information and meeting stand at Seafood Expo Global value for money calculation (VFM) 10:1.
- Seafish / SDI Pavilion at Japan Seafood Expo VFM 10:1.
- Seafish Stand and sponsored demonstration area at China Fisheries VFM 4:1.
- Seafish information stand at Seafood Expo Global VFM 7:1.
- >22,000 visits to the Export Guides in 2016.
- Scottish mackerel promotion organised in Aeon retail chain in Japan.

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

“This was the first time IFC / Nor Sea attended the show. We do business in Japan already so the show gave us an opportunity to meet our customer base in addition to exploring new opportunities and leads in a market we feel we can develop further. We were pleasantly surprised by the quality of leads attained and the number of people that dropped by the stand. The interpreters did a fantastic job helping the exhibitors not just with basic translation requirements but also actively helping market the exhibitor’s products.”

Philip Andrade, Sales Manager, International Fish Cannery / NorSea

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 was a perfect opportunity to demonstrate the importance that the British companies put upon their relationships with the invited importers.





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<p>English Account Management</p> <p>The English Account Manager ensures that the top 30 levy paying accounts in England have relevant access to all Seafish services.</p>	<p>ACCOUNT SUPPORT</p> <p>Identify key accounts in England. Ensure regular contact with key accounts and introduce Seafish colleagues as required.</p>	<ul style="list-style-type: none"> • Contact maintained with the accounts. • Meetings spreadsheet kept up to date and contact forms completed where significant. • CRM system updated. • Contacts have increased on the account database.
<p>WORK PROGRAMME OVERALL KPI</p> <p>Year-on-year improvement in Stakeholder satisfaction from baseline established in year one survey.</p>	<p>SEAFOOD GRIMSBY & HUMBER AND FASFA</p> <p>To maintain strategic relationships between Seafish the Seafood Grimsby & Humber board and FASFA.</p>	<ul style="list-style-type: none"> • Quarterly SGG&H board meetings – all attended. • Support during Seafood Week for members of the Seafood Grimsby & Humber board. • A Yorkshire & Humber Seafood recipe book launched. 10,000 copies distributed during Seafood Week. • FASFA factsheet project delivered and meetings attended.
<p>WORK PROGRAMME ANNUAL TARGET FOR 2016-17</p> <ul style="list-style-type: none"> • Two Supply Chain Projects. • Two Regional events. • Thirty key accounts identified and visits made. 	<p>SUPPLY CHAIN SUPPORT</p> <p>In partnership with stakeholders, two regions will be focussed on in which opportunities will be identified to improve the supply chain efficiency and further develop the relationships between them and the English Seafood Sector.</p>	<ul style="list-style-type: none"> • 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.
	<p>HUMBER SEAFOOD SUMMIT / REGIONAL EVENTS</p> <p>Deliver the Humber Seafood Summit 2016 and regional event.</p>	<ul style="list-style-type: none"> • The Humber Seafood Summit was successfully delivered. • A Food Careers event with a large focus on the Seafood sector was successfully delivered.

ENGLISH ACCOUNT MANAGEMENT

Key Highlights

- Key stakeholders include many Importers and distributors, meetings have been positive with on-going engagement in areas such as regulation, responsible sourcing, market insight, and Seafood Week. Improved attendance at Seafish events has been achieved.
- The Humber Seafood Summit 2016; a successful re-launch after a two-year gap. The venue, programme and quality of speakers were very well received with positive feedback from delegates.
- The Food Careers event was successfully delivered in collaboration with Grimsby Institute They attracted representatives from key stakeholders. Very positive feedback was received from participants and there is a clear demand for a further event.

Case Study

An opportunity to support a careers event at Grimsby Institute was identified at a very early stage working closely with the Institute on the seafood element of the event. Bringing together local seafood companies and Seafish colleagues the event was acknowledged as a great success.

“Please can we offer our thanks for the support provided the Sea Fish Industry Authority for the hugely successful ‘Future of Food’ careers event here at the Grimsby Institute. In particular we would like to offer our appreciation to Julie Snowden, who, as always provided our team with excellent support. This event was a great opportunity for our learners and apprentices from HE and FE to meet with you, colleagues and the Industry, learn more about a hugely important sector for our region and for the UK economy, but also to see the seafood sector as a real career option, through research, IT, logistics, creative media, management, HR, production and technical roles to name a few. To follow on from this success we will be looking to plan another event in early 2018 and our team will be excited to have the opportunity to collaborate with Seafish again in the future.”

Jill Alton, the Principle of Grimsby Institute





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<p>Seafish Scotland</p> <p>To co-ordinate and deliver support to the industry, by working throughout the supply chain to develop the competitive performance, quality practices and global reputation of a sustainable Scottish industry.</p>	<p>REGIONAL DELIVERY</p> <p>Ensure Scottish interests are represented and reflected in core Seafish work.</p>	<ul style="list-style-type: none"> We delivered a number of presentations and events to support and raise awareness of the Responsible Fishing Scheme; and a number of port visits were undertaken to communicate the development of the Responsible Fishing Port Scheme. Additional species of Scottish relevance were added to RASS. Events delivered to wide breadth of stakeholders; including market insight seminars, product flow workshops, provision of stand at Scottish Fishing Expo, and learning journey for Scottish colleges with industry collaboration. Stakeholders were encouraged to participate in Seafish consumption campaigns and Seafood Week.
<p>WORK PROGRAMME OVERALL KPI</p> <p>Year-on-year improvement in stakeholder satisfaction score from baseline survey.</p>	<p>NORTH EAST WHITE FISH FORUM</p> <p>Promoting communication and co-operation between catching and processing sectors.</p>	<p>Secretariat support was provided to North East White Fish Forum for regular meetings over the year.</p>
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <p>Stakeholder satisfaction with Seafish's delivery in Scotland measured by testimony and stakeholder survey (improvement from 2015/16 baseline).</p>	<p>SHETLAND SEAFOOD LIAISON</p> <p>To provide support and maintain communication with the industry in Shetland.</p>	<p>Shetland stakeholders engaged and a programme of two supporting projects delivered in partnership with industry. The Seafish Board and Executive team visited Shetland. Four workstream presentations were facilitated.</p>
	<p>RELATIONSHIP MANAGEMENT</p> <p>To improve access to central Seafish services for the Scottish seafood industry.</p>	<p>Identification, engagement and meetings held with key industry stakeholders and organisations across Scotland. Key accounts conducted year-end review with VFM benefit of £135,000 pro-rata.</p> <p>Regional team inputting to wider Scottish working groups; committees and forums with seafood industry expertise.</p>
	<p>SCOTTISH SEAFOOD TRAINING NETWORK (SSTN)</p> <p>Assist in the maintenance and growth of the Scottish training network.</p>	<ul style="list-style-type: none"> Scottish Seafood Training Network (SSTN) established with Skills Development in Scotland. Training development support provided to the Scottish Seafood Association. Quality, Filleting, Train the Trainer and Food safety courses delivered. SSTN expanded to include 22 businesses and additional accredited trainers identified.

CASE STUDY - MARKET INSIGHT SEMINAR, ABERDEEN

Testimonial

A Market Insight seminar was held in Aberdeen in February 2017 highlighting opportunities within Retail and Foodservice. The event provided an ideal opportunity for businesses to gain first hand insights into seafood trends and market research. Presentations were delivered by specialist market analysts from NPD Crest and AC Nielsen. The Seafish Market Insight team also highlighted additional opportunities for industry to engage with Seafish marketing campaigns. It also provided an ideal platform to network with industry professionals and other key stakeholders. Evaluation of the event by those who attended all stated that it was well worth attending and cumulatively attributed £1.35 million in potential

value of the information delivered. The overall industry feeling was that Seafish should continue to offer these events.

Some examples of testimonials from the day were:

"The ability to use Seafish as a tool for progress is invaluable. The Seafish speakers on the day were very good, very engaging and very passionate."

John Kelly, Sales and Business Development, Gourmets Choice

"Excellent event today, and expertly chaired. Great to see the event held in North East Scotland. Well done and thanks. Best wishes."

Derek McDonald, Industry Support Executive, Aberdeenshire Council

CAMPAIGN KPI	ACHIEVED
<ul style="list-style-type: none"> Delivery of five Responsible Fishing Scheme activities and events. 	<p>We delivered local launch events for the Responsible Fishing Scheme in Peterhead and Lerwick with a follow up workshop in Peterhead. Bespoke meetings and presentations were made for the Scottish Pelagic Fishermen's Association and the Scottish Fishermen's Federation; a pilot group certification trial is being explored in Orkney.</p>
<ul style="list-style-type: none"> Deliver thirty new or updated species profiles within the RASSS tool for Scottish fisheries. 	<p>Over 20 species profiles were identified for inclusion, and these were delivered. New profiles added included hake, saithe, squid, Rockall haddock and blue whiting. The Seafish responsible sourcing team updated over 20 other fisheries for species already listed.</p>
<ul style="list-style-type: none"> Undertake five Responsible Fishing Port visits. 	<p>Port visits and meetings were held across Scotland by both Seafish regional staff and the project manager for the programme. Ports visited included Peterhead, Fraserburgh, Lerwick, Kinlochbervie, Scrabster and Mallaig.</p>
<ul style="list-style-type: none"> Deliver two learning journeys for Scottish stakeholders. 	<p>Unfortunately a planned learning journey to the Humber Seafood Summit was not taken up by Scottish Industry, and one agreed representative who was attending had to cancel at the last-minute. However, a learning journey to Peterhead involving students and lecturers from four Scottish colleges for a 'net to plate' experience went ahead, meeting all objectives and was undertaken with full industry backing. Feedback was exceptional.</p>
<ul style="list-style-type: none"> Deliver four bespoke events to disseminate Seafish outputs. 	<p>We exceeded this deliverable with a wide range of bespoke activity over the year. This included: Two seafood and market insight seminars. Educational events at two colleges during Seafood Week and MSC students at Queen Margaret University. A workshop to gather product flow data to aid supply chain understanding for Brexit priorities. We also hosted a stand at the Fishing Expo and attended a Food and Drink Careers event in Aberdeen.</p>
<ul style="list-style-type: none"> Carry out outreach activity to gain Scottish industry participation in Seafish marketing and PR campaigns. 	<p>One to one contact with businesses to encourage participation in Seafood Week, Fish is the Dish, Fish 2 a week and other relevant Seafish programmes. Developed Scottish Regional News portal within main Seafish website. Significant use of Social Media, Press and PR to encourage participation in Seafish Marketing/PR activities.</p>





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<p>Seafish Wales</p> <p>The overarching aim of Seafish Wales is to support sustainable development and growth in Wales.</p>	<p>SEAFISH WALES ADVISORY COMMITTEE (SWAC)</p> <p>This Committee oversees and advises on the delivery of the Seafish Wales Regional Strategy.</p>	<ul style="list-style-type: none"> • SWAC meetings held March 2016, August 2016 and February 2017. • SWAC meeting agendas, papers and minutes produced for each meeting. • SWAC membership has increased over the year.
	<p>PROJECTS ON BEHALF OF SEAFISH WALES ADVISORY COMMITTEE (SWAC)</p>	<ul style="list-style-type: none"> • Industry-led 'Wales Seafood Strategy' outlining the Welsh seafood industry's vision for sustainable growth launched during Seafood Week, October 2016. • Welsh Fishing Safety Committee comprising all seven local fisherman's associations established and three EMFF fishing safety project applications completed. • Draft Wales Seafood Industry Dashboard to report on progress against Wales Seafood Strategy targets endorsed by SWAC. • Joint Seafish/Mentor a Business EMFF Welsh Seafood Market Development project in development. • SWAC endorsed Welsh seafood business case study project commissioned. • Socio-economic assessment of the Welsh sea bass fleet produced to support Welsh Government negotiations at December Council.
<p>WORK PROGRAMME OVERALL KPI</p> <p>Year-on-year improvement in stakeholder satisfaction score from baseline established in year one survey.</p>		
<p>WORK PROGRAMME ANNUAL TARGET FOR 2016-17</p> <p>Co-ordinate the delivery of the Seafish Wales Regional Strategy and facilitate an Advisory Committee of Wales Stakeholders.</p>	<p>FACILITATION, COMMUNICATIONS AND ADVICE</p>	<ul style="list-style-type: none"> • Record levels of Welsh participation in Seafish Annual Economic Fleet Survey and Processing Census 2016. • Two successful Seafood Week events in North and South Wales, October 2016. • Welsh scallop fishery article and video case study produced for Quay Issues magazine. Outputs were key for mitigating negative press/reactions from the to the Cabinets Secretary decision to refresh Wales scallop fishery legislation.

SEAFISH WALES

Key Highlights

- Wales Seafood strategy developed with full industry and Welsh Government backing and launched during Seafood Week 2016. Cabinet Secretary attended and endorsed launch.
- Welsh Fishing Safety Committee established with support from all seven local Fisherman's Associations and three EMFF fishing safety project applications developed.
- Successful, well-attended Seafood Week events delivered in North and South Wales.
- Successful delivery of socio-economic assessment of the Welsh sea bass fleet at short notice to support Welsh Government (WG) negotiations at December Council.

Case Study

A socio-economic assessment of the Welsh sea bass fleet was produced to support Welsh Government and Welsh industry negotiations at December Council regarding sea bass fishing. The report was welcomed by both Welsh Government (WG) and industry, and WG Head of Fisheries Andy Fraser stated at SWAC that Wales may not have secured the deal they did without the report.

"... thank you for the Economics report. The details provided were very helpful and informative given the challenges at this year's negotiations."

Jim Evans, Welsh Fishermen's Association (WFA)





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<p>Seafish South West England</p> <p>The overarching aim of Seafish in the South West is to support the sustainable development and growth in the region.</p>	<p>FACILITATE SEAFISH SW ADVISORY COMMITTEE</p> <p>Development of projects, manage and support regional strategic engagement.</p>	<ul style="list-style-type: none"> 5th & 6th SSW Advisory meetings held in Oct 2016 & April 2017. Projects initiated and completed and reported on. 2016-17 annual plans signed off by the committee. Projects delivered on time and within budget. CRM enquiries logged. Regular interactions with key contacts and advisory committee members deliver projects and promote areas of interest to SW seafood industry. Facilitated and coordinated regional industry visits for key stakeholders.
<p>WORK PROGRAMME OVERALL KPI (FROM CP) FOR 2016-17</p> <p>Year-on-year improvement in Stakeholder satisfaction from baseline established in year one survey.</p>	<p>SEAFISH SW PROJECTS</p> <p>Projects delivered as directed by the Seafish SW Advisory Group.</p>	<ul style="list-style-type: none"> Gear Selectivity, Landing Obligation work carried out in the SW in partnership with Cefas, findings reported. Ongoing role as Chairman of the Cornish Sardine Management Association. Sardine fishery achieved MSC recertification in March 2017. Gear technology workshops/training courses and trawl development of SW selectivity initiatives, generic Gear advice and support. Regional engagement with FLAG 2 in Cornwall and Dorset. Positive feedback from the SW Advisory group on the work carried out in the SW by Seafish. Facilitate regional engagement in RFS and RPS in the SW. Testimonials from scientific partners, cost savings evaluated.
<p>WORK PROGRAMME ANNUAL TARGET FOR 2016-17</p> <p>Co-ordinate the delivery of the Seafish South West Regional Strategy and facilitate an Advisory Committee of SW Stakeholders.</p>	<p>PROMOTING REGIONAL CONSUMPTION</p> <p>Work with regional stakeholders to improve the profile of seafood within the South West.</p>	<ul style="list-style-type: none"> Two Seafood Week events hosted in the SW. Attendance at Brussel Seafood Expo, Newlyn Fish Festival, Dorset Seafood Festival and the Bournemouth Fishing Exhibition. SW recipe booklet produced. Industry engagement through port visits and market tours, conference and workshop presentations. Identify areas of opportunity for the SW Seafood Sector enhancing profitability and market opportunities. Record of media articles, and social media posts and followers.



SEAFISH SOUTH WEST

Sustainable Development and Growth

The overarching aim of Seafish in the South West is to support sustainable development and growth. This is achieved through the delivery of the following key Seafish South West Regional objectives:

- Facilitate an Advisory Committee to support Regional Strategy development.
- Co-ordinate the delivery of the Seafish South West Regional Strategy.
- Facilitate good communication and enhance Seafish engagement of key stakeholders in the South West.
- Signpost business development and funding opportunities to support sustainable development and growth.
- Improve Seafish visibility, providing expert advice and a regional point of contact.

Cornish Sardine Management Association (CSMA) 2016-2017

Since taking on the Chairmanship of the Cornish Sardine Management Association in 2016 we have been working towards MSC recertification. The MSC certification is a key marketing tool for the fishery and very important in maintaining markets and giving the fishery a competitive edge. This MSC re-certification process has taken over nine months and involved a lot of work from the members and the committee of the CSMA due to the stringent requirements. A number of conditions have been set on the fishery over the coming years and an action plan was developed by the association to detail how these conditions will be met. The action plan was agreed by the members and submitted as a key element in the certification process. The process was successful and the fishery was granted a continuation to its MSC certification on 1st March 2017. It was highlighted during the process that there was a requirement to improve the harvest strategy and management controls on the fishery. In order to get the views of all skippers, vessels owners and processors a questionnaire was designed and all parties were individually interviewed in collaboration with a Cornwall IFCA officer. This has allowed a Harvest control strategy and code of conduct to be developed which was formally signed off by the members at the AGM in March.

CAMPAIGN KPI	ACHIEVED
• Delivery of MSC re-certification.	Guide the Association through the MSC recertification process over the last nine months. Action plan written on behalf of the association members to meet the conditions set by the MSC over the coming years.
• Work with industry partners to develop cohesive management controls for sardine stocks.	A key element of the work undertaken was to develop a harvest strategy and harvest control rules to meet the fisheries management needs. This was drafted discussed and agreed by the membership at the AGM in March 2017. Dialogue was set up with the French and Spanish to aid cohesive management.
• Development a Code of Conduct for the fishery that is signed off by all members.	A code of conduct was developed in collaboration with the catching and processing members of the association. Based around the FAO fisheries code of conduct and adapted to meet the requirements of the ring net fishery. The Code of Conduct was agreed by all members and will be signed off individually prior to the commencement of the 2107-18 season in July.
• Maintain and enhance the reputation of the SW Sardine Ring net fishery.	During the 2016-17 season a number of issues arose with the fishery in relation to fish standings and by catch. A survey of all the skippers and processors was undertaken to address these issues and introduce management measures to ensure compliance with good practice.





PROGRAMME

Seafish Northern Ireland

The overarching aim of Seafish Northern Ireland is to support sustainable development and growth in Northern Ireland.

WORK PROGRAMME OVERALL KPI

Year-on-year improvement in stakeholder satisfaction survey from baseline survey.

WORK PROGRAMME ANNUAL TARGET FOR 2016-17

- Delivery of agreed Seafish Northern Ireland projects.
- Regional support for Northern Irish industry.

PROJECT

FACILITATE SEAFISH NORTHERN IRELAND ADVISORY COMMITTEE

DELIVERY ON TARGETS 2016-2017

- Three SNIAC meetings arranged and facilitated during 2016/17 and minutes published online.
- Seafish NI Annual Plan 2017/2018 signed off by SNIAC at March 2016 meeting.
- SNIAC events, projects and workshops arranged and facilitated as required eg NI Seafood Week 2016 event, The Loaves and Fishes.

INDUSTRY RELATIONS, COMMUNICATIONS AND ADVICE

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.

- 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 42,000 views to date) and reports via upgraded Seafish NI webpages.
- Represented Seafish at key NI steering groups.
- Presentations given at international and local conferences and workshops eg Parabere Forum.

PROJECTS ON BEHALF OF SNIAC

NI projects included work on Fishermen's Safety (PFDs), seafood promotion, velvet crab sustainability and marine conservation zones.

Other opportunities identified during the year that were actioned include: 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.

- Developed award-winning Seafish NI stand at Balmoral 2016 and designed a Seafish Balmoral 2017 stand.
- Worked with AFBI and industry and completed a report on Scallop Larval Dispersal.
- Disseminated 21 NI seafood industry case studies and progressed a further six new case studies.
- Development of Seafood Training Network NI including fish filleting courses in Belfast.
- Brought stakeholders together to form a new Northern Ireland Fishermen's Safety Forum.
- Working with AFBI, developed a proposal for NI-specific RASS profiles.

SEAFISH NORTHERN IRELAND

Key Highlights

- A Seafish Northern Ireland project with industry and AFBI on Scallop Larval Dispersal in the Irish Sea and identification of potential nursery areas to enhance future fishing opportunities was completed, disseminated to stakeholders and published on the Seafish website.
- Seafish NI brought stakeholders together to form a new Northern Ireland Fishermen's Safety Forum.
- Twenty one Seafish Northern Ireland seafood industry case studies and mini-films were disseminated widely during the NI Year of Food and Drink 2016 and content used by Tourism Northern Ireland, Discover Northern Ireland and FoodNI as well as by the local and national media.
- An event to celebrate Seafood Week in Northern Ireland, The Loaves and the Fishes was a great success with over 300 students from all the catering colleges in NI, competing for the title of 'Student Seafood Masterchef'.

Case Study: The Loaves and the Fishes

The Loaves and the Fishes 2016 was a unique event aimed at celebrating Seafood Week in Northern Ireland. Led by Ards and North Down Borough Council (ANDBC) and Seafish, with support from other partners - FoodNI and Ballywalter Park; the Loaves and the Fishes was a two-day seafoodie paradise.

Seafood cookery demonstrations by some of Ireland's foremost Michelin star chefs including Stevie Toman of OX in Belfast and Martijn Kajuiter of The Cliff House Hotel in Ardmore, Co Waterford, ran alongside fish filleting demos by Master Filleter Hal Dawson. A food village with 30 local artisan producers and tours of the Walled Garden at Ballywalter Park with the Head Gardener created further interest.

The event also saw all six catering colleges from across Northern Ireland (with almost 300 students and staff) attend and compete for the title of 'Student Seafood Masterchef' which was judged by a host of fabulous foodies including renowned critic Charles Campion. Belfast Met were crowned champions with their fabulous Portavogie Bouillabaisse.

The Loaves and Fishes attracted over 3,000 visitors and the event was highly rated by the public with a 94% satisfaction rating achieved. Stall-holders in the food village sold over £10,000-worth of local produce and the PR generated reached over 870,000 people.

A short film of the event was created and a recipe booklet (a joint Ards and North Down Borough Council and Seafish initiative) was produced. The event also cemented important partnerships with the local colleges (who used the event to direct their seafood learning modules in college), FoodNI, industry stakeholders, the foodservice sector and a new and valuable partnership was created with the local Council (Ards and North Down Borough Council).

"Everything was great and the Minister really enjoyed himself so thanks for all your help in making it happen."

Harry Harper, Northern Ireland Office

"Wow, wow, wow, many congrats Lynn. What an amazing event, the students had a ball and loved every minute. Fair play to you for getting so involved with the colleges and pulling together such a successful event. Thank you so much for pushing us all at the Met to make it happen."

Thomas Turley, Belfast Metropolitan College

"Sincere appreciation to you for all your hard work and energy in everything you do from the South West College team – both staff and students - for a thoroughly enjoyable day."

Grainne Mulholland, South West College





PROGRAMME

Enhance Reputation: Seafish Campaigns

Supporting key messages to enhance the reputation of the seafood industry.

PROJECT

EXPERT INSIGHTS

Communications uplift given to a range of Seafish 'Expert Insight' projects and initiatives.

CONSUMER CAMPAIGN

Communications uplift given to the Seafish consumer campaigns.

SKILLS DEVELOPMENT

Initiatives designed to educate and upskill the next generation, and promote the value of seafood.

DELIVERY ON TARGETS 2016-2017

Media coverage for the Seafish industry was 93.3% positive / balanced for the year to end of March 2017, much higher than our 85% target. Our reach was 81.1 million.

Media support given to:

- Landings obligation.
- Regulation.
- Quay Issues.
- Expert Insight.
- Market Insight.
- Responsible Sourcing.
- Safety and training.

Measured media and promotional support given to the following areas of Seafish consumer work:

- Seafood Week - 71% increase in media reach from 76 million to 130 million.
- National Fish & Chip Awards - 99% positive / balanced coverage achieved.
- Fish and Chips nutrition - good trade coverage. Superfishoil summer campaign had a reach of 273 million.
- Fish 2 a week winter campaign achieved a reach of 188 million.

Billingsgate

- Training courses delivered to 35 colleges.

Young Seafood Chef of the Year

- Increased PR promotion to 250 UK catering colleges.
- Winners' recipes featured in Seafood Week promotions.
- 21 lecturers went on study trips.
- 120 Seafood Guides were presented to all entrants and lecturers.
- Winner used as Seafish ambassador.

World is Your Oyster Campaign

- New case studies were created and a careers map was commissioned, which will be finalised in the next financial year.

Seafood Restaurant of the Year

- 35 restaurant entries.
- 46 media articles were generated with a readership reach of 1,453,865 people.



ENHANCE REPUTATION:
SEAFISH CAMPAIGNS

PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
WORK PROGRAMME OVERALL KPI 85% positive/balanced media coverage towards industry.	RESPONSIBLE SEAFOOD Communications uplift given to the Seafish 'Responsible Seafood' projects and initiatives.	<ul style="list-style-type: none"> • Responsible sourcing gained coverage that was 100% balanced or positive with a reach of 1.9 million.
WORK PROGRAMME ANNUAL TARGET FOR 2016-17	<ul style="list-style-type: none"> • Quarterly media measurement against KPI split by campaign and project. 	<ul style="list-style-type: none"> • Media sentiment measured as a whole and across campaigns quarterly with an end of year positive sentiment score of 93.3%.

Media Campaigns

It's been a great year for our media campaigns. Highlights include our:

- Seafood Restaurant of the Year coverage which yielded an impressive 96.3% balanced or positive media sentiment and with a reach of 1.94 million.
- World is Your Oyster campaign in which we partnered with Not Going to Uni to encourage school leavers into the industry. We produced new case studies and created a careers map which will go live in the next financial year.

Testimonials from satisfied stakeholders in the fish and chip and foodservice sectors are also testament to the media secured in 2016/17:

National Fish & Chip Awards

"I honestly cannot believe the level of coverage we are experiencing. Our news has literally gone global. Germany, Spain, Italy, Canada and Miami. Not to mention the fish and

chip effect in the UK, where it appears to have made all media in existence, including newspapers, internet, and TV (Sky Sports, Sky News, BBC to name a few). This is fantastic for fish and chips and our industry."

Craig Maw, Kingfisher Fish and Chips, Plymouth, Devon

Young Seafood Chef of the Year

"As a lecturer involved in the Young Seafood Chef of the Year, we were taken to the Scottish Seafood factory in Bellshill so as we could learn more about the seafood industry. I was taken aback at the whole set up; it's a fantastic facility and was a very worthwhile visit as I feel that I came away with valuable information on Scottish Shellfish, how they grow and how they are caught. The whole process 'from the sea to the plate' was explained in great detail."

Christopher Watson, Curriculum Enhancement Lecturer, Hospitality Section: West College Scotland, Paisley



PROGRAMME

Enhance Reputation: Industry Support

This programme aims to secure improved resources for industry and greater understanding of the work of Seafish by stakeholders.

WORK PROGRAMME OVERALL KPI

85% positive/balanced media coverage towards industry.

WORK PROGRAMME ANNUAL TARGET FOR 2016-17

- Four meetings of industry support groups undertaken with feedback built into projects.
- Restructured Seafish website.
- Improved communication with stakeholders measured by stakeholder survey.
- Four industry events positively received and well-attended.

PROJECT

STAKEHOLDER ENGAGEMENT

Enhancing engagement between Seafish and its key customer base.

SEAFISH INFORMATION

Ensuring the delivery of traditional and digital information assets for industry in support of the corporate plan objectives.

MEDIA RESPONSE

Ongoing media management on behalf of the UK seafood industry.

DELIVERY ON TARGETS 2016-2017

- Marketing Optimisation Group well received by industry with an ongoing plan of engagement in place for the coming year.
- Attendance and presentations in Aberdeen, London and Shetland to inform and engage with stakeholders on key Seafish campaigns for improved participation.

- Seafish.co.uk work progressing to 2018 launch in line with associated Fewer, Bigger, Better brand.
- Seafish's monthly industry newsletter, The Roundup has been issued every month of the year, containing updates on Seafish work and relevant industry news.

- It has been a busy year for the communications dealing with topics such as responsible fishing, safety and training, tuna food fraud, market insight and the promotional campaigns detailed above. All of this has led to our KPI of 85% positive / balanced coverage being exceeded with a final figure of 93.3%.
- We provide ongoing media training workshops to key stakeholders.

ENHANCE REPUTATION: INDUSTRY SUPPORT**Protecting the Industry's Reputation in the Media**

At Seafish, we recognise the importance of a positive industry reputation and the value that this brings. As such, the Communications team have had a busy year, working to promote stories, initiatives and projects that will help drive the industry towards an 85 per cent positive or balanced sentiment in media coverage. We also work to anticipate and manage potential reputational challenges and issues.

Highlights from 2016/17 include enhancing the industry's reputation through topics such as responsible fishing and safety and training; providing insight with our work around market data and economics reports; and protecting the industry's reputation in regard to issues such as tuna food fraud and plastic in the oceans. One of the biggest issues we faced was Haddock being downgraded by the Marine Conservation Society (MCS). Our quick and robust response helped balance the story, protect industry's reputation and saw an enormous amount of positive engagement.

The team has continued to support colleagues in their development of a range of initiatives designed to address social issues in seafood production. By promoting a series of tools including RASS for risk assessment, TESS for signposting and the Responsible Fishing Scheme for vessel certification, we are working together to help eliminate unethical practices from UK seafood supply chains.

Working with the Safety and Training team, we created a new safety pack containing key safety information, on topics including cold water shock, personal flotation devices, man overboard exercises and training. 1,000 packs were distributed to Fishermen through Fishermen's Mission centres.

We also worked in partnership with www.notgoingtouni.co.uk, the UK's leading website for school and college leavers looking at alternatives to university, to drive young people towards a career in the seafood industry. By developing case studies for the notgoingtouni.co.uk website, issuing tweets to their 50k followers and providing content for the notgoingtouni.co.uk apprenticeships newsletter (circulation list of 120 000), we were able to target an estimated 170,000 young people.

All of this has led to our KPI of 85% balanced or positive coverage being exceeded with a final figure of 93.3%.

"Thoroughly enjoyed the media training course – apart from the content which was brilliant, it was also another great opportunity to meet and associate with other industry people."

David Miller, Millers Fish and Chips, Haxby, York



PROGRAMME

Responsible Fishing Scheme (RFS)

The updated RFS scheme provides the onshore supply chain with the ability to make informed decisions in respect of their responsible sourcing strategies.

WORK PROGRAMME OVERALL KPI

1,000 vessels certified to the scheme by end-March 2018.

WORK PROGRAMME ANNUAL TARGET FOR 2016-17

- 400 vessels certified to the new scheme.
- Additional 200 in application.

PROJECT

RFS MANAGEMENT

Comprehensive engagement with the UK fleet, oversight of Certification Body and establishment of scheme performance indicators.

Roll-out of the Skipper Support course and widespread industry understanding of the benefits of RFS across all UK sectors.

RFS DEVELOPMENT & OUTREACH

Widespread endorsement of the RFS by the UK supply chain, relevant foreign catching sectors and relevant industry decision makers realised.

Engagement with several International Fleets underway with the first foreign vessels certified.

RFS IMPROVER PROGRAMME

Availability of a guidance framework to support fisheries in developing countries in addressing key safety and ethical issues, allied to the main RFS programme.

DELIVERY ON TARGETS 2016-2017

- We are still in the 'early adopter' stage with 66 vessels certified and 69 in application (as at end-March 2016).
- Skipper support courses held around the UK were very positively received, with feedback being incorporated into the revised support documentation which was launched in Autumn.
- The RFS website is now a one-stop-shop for application forms and guidance, making supplying to the scheme more straightforward. The improved application process has demonstrably reduced average times to certification by two months.
- Our Certification Body is performing well against all key performance indicators agreed.

- 26 industry-leading retailers, processors and foodservice companies have formally committed to incorporating the RFS into their Sourcing Policies.
- The Scheme is receiving widespread endorsement and support globally.
- In line with the recommendation of the Oversight Board, international pilots will be run during 2017, to demonstrate the benefits and challenges of running the scheme outside the UK.

- VIP guidance framework is in final draft and piloting underway in two locations.
- Feedback from the work completed during 2016-17 has been incorporated and Version 1 of the VIP framework will be released via the RFS website during Q1 of 2017, once approved by the VIP Steering Group.

RESPONSIBLE FISHING
SCHEME (RFS)**Case Study: Seafish road-show a series of RFS Support Courses**

A Support Course was developed for skippers but on delivery opened up to an audience that also included the supply chain and individuals intending to support skippers in preparation for their RFS audits. Courses were free to attend and held in Brixham, Grimsby, Newlyn, Peterhead, Kilkeel and Portavogie, attracting numerous attendees, all of whom found the course beneficial leaving with an increased awareness of requirements and progression paths to certification.

"The RFS is something we are passionate about embracing as it aligns with our own ethical and sustainable values and the course certainly aided my understanding of the RFS and made it clear to me why it is such a positive scheme to be involved in. The course was also a unique opportunity to gain insight into the RFS process and it was great to equip ourselves with this knowledge and be in a position to help others too. Any doubts I had about the RFS were removed and I would confidently recommend the scheme to others."

Anton Dietschel-Buehler, Head of Technical, Flatfish

It was recognised early on that the key to successfully engaging UK vessels into the revised RFS is for the support materials to be accessible, easy to understand and intuitive. Following the delivery of the RFS support courses, feedback was collated and redevelopment of Scheme guidance and documentation was undertaken, along with a slight re-design of the application process to ensure the flow was more intuitive and clearer to follow.

There is still much work to be undertaken to continuously improve and expand the range of support materials available, and this will continue into 2017 with the team looking to establish external funding to support the development of an RFS e-learning module, which will be aligned to the Seafish online learning platform.

In parallel with re-designing the application documentation, modifications were also made to the Scheme's Compliance Support Guides. Designed to provide best practice guidance both across a range of fishing sectors and on issues common to all fishing operations, the guides were reduced in number and re-formatted to become much more user friendly. The 'How To Join' section on the RFS website is now a one-stop-shop where the new application pack and supporting guidance can be found.

Relaunched in the autumn of 2016, early indications show that the revisions have had a significantly positive effect on progression rates, reducing the average time taken to become certified from five months down to three months, and positive feedback is consistently being received from the new Members coming through weekly that have completed the process using the new documentation.





PROGRAMME

Advocacy

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 – four retailers and two foodservice companies publically committed, two standard holder publically endorsing.
- RASS – two retailers and one foodservice company publically committed.
- Issues Groups – 15 new members and Ethics and CLG promotions at three 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 2016-2017

- The supply chain's commitment to incorporate the Responsible Fishing Scheme certification into their sourcing policies has grown, with six retailers, 18 processors and one foodservice company signed up.
- Soft launched TESS, Seafish's new sign-posting tool, to an international audience at the Boston Seafood Show.
- The Issues Groups, RFS, RASS and latterly TESS, were promoted in talks given by the Head of Advocacy at five international events.
- The RFS was promoted on BBC Countryfile, which has an audience of 8.6 million viewers and during participation in the Guardian's Discussion Panel "Slavery in the seafood supply chain: what can we do about it?"
- Identified 15 new members for the SECLG from international supply chains supplying in to the UK market, with an interest in RFS and the ethics work undertaken by Seafish.
- Speaking internationally enabled networking and the identification of topics and speakers for Issues Group meetings.
- Delivery of three meetings to an international audience of harvesters keen to engage in the Seafish RFS.

ADVOCACY

Promotion of Seafish's work on social responsibility in the seafood supply chain

The ability to demonstrate social responsibility in seafood supply chains is paramount. Seafish now has a suite of tools that can help industry and other stakeholders identify the challenges, where these challenges exist, and what can be done to mitigate them. As Seafish's reputation in this area grows on a global scale, 2016/17 provided another good opportunity to promote these tools.

The Head of Advocacy was invited to speak at several key events including the Global Seafood Expo, Human Rights at Sea Conference, the Guardian Panel on slavery in seafood supply chain, BBC Countryfile, the Boston Seafood Show and the launch of the first Annual Report by the Independent Anti-Slavery Commissioner, Kevin Hyland OBE. The events gave a chance to present Seafish tools including TESS, RFS, HRRTS, RASS and the SECLG. As a result, membership of the SECLG has increased and the events provided opportunities to identify new speakers in the field of ethics for SECLG meetings. Sign-up by industry and NGOs around the world to endorse and / or use the tools developed by Seafish has also increased.

The issues around seafood ethics require collective action on a global scale and through ongoing promotion Seafish now has an international reputation for leading with this collaborative approach through development and implementation of these tools and initiatives.

"Well done on Countryfile – it was the most hard-hitting piece I have seen on the issues in the fishing industry to date – you were a good defence for the industry without denying there was a problem, however small."

Alison Godfrey, Business Development Direct, Fishermen's Mission

"Your contribution was key in making the event inclusive and insightful. Thank you for sharing your expertise and making the event a success. I very much look forward to working with you in the future."

Kevin Hyland OBE, Independent Anti-Slavery Commissioner

"The Guardian event was also well received with positive feedback from post-event surveys quoting, "The panel discussion was excellent" ... "really great selection of panellists."





PROGRAMME

Safety & Training: Fishing Safety

This work 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 2016-17

- Delivery of six safety roadshows.
- Disseminate advice to industry on suitable MOB recovery equipment.
- Contribute effectively to the work of the FISG.
- Respond promptly to recommendations made by the MAIB.

PROJECT

SAFETY ROADSHOWS

In collaboration with colleagues, and in conjunction with Fishing Industry Safety Group (FISG) partners, plan, organise and deliver six fishing safety events at locations around the UK.

MOB RECOVERY

Conduct research into the manoverboard (MOB) recovery systems suitable for use on fishing vessels and promulgate advice on their use to the fishing industry.

FISG

Attend meetings of the Fishing Industry Safety Group (FISG) and contribute effectively to its work.

MAIB

Contribute to Marine Accident Investigation Branch (MAIB) accident investigations (as required) and respond promptly to any recommendations arising.

DELIVERY ON TARGETS 2016-2017

- During 2016 we attended the Skipper Expositions at Aberdeen and Bournemouth. Both were extremely successful with more than 300 fishermen attending.
- The Expos provided focal points for us to promote and communicate our key safety messages, including the importance of wearing PFDs.
- Funds budgeted for the delivery of additional events were reallocated to Fishermen's Training Delivery to bridge the gap between EFF and EMFF funding.

- We joined the Fishing Industry Safety Group's (FISG's) MOB sub-group and helped develop plans for a concentrated campaign on MOB, to include advice and guidance for fishermen on MOB recovery equipment available.
- We purchased and distributed 40 water-inflatable mannequins for use by our ATPs and FISG partners when demonstrating MOB drills onboard fishing vessels.

- We attended meetings of the FISG Executive Board, Coordination Group and sub-groups, hosting meetings at our Edinburgh office.
- We organised and led three meetings of the FISG Fishermen's Training group.
- Feedback from FISG members indicates our input to the work of the FISG is highly-valued and appreciated.

- The MAIB published 13 reports during the year on accidents involving UK registered fishing vessels. Only one of these (JMT) included recommendations for Seafish action (on FV stability and registration survey procedures).
- MAIB invited our Head of Safety & Training to write the foreword to the fishing section of Safety Digest 01/2017.

SAFETY & TRAINING:
FISHING SAFETY

Fishing Industry Safety Group

"Seafish's overall contribution in the preparation for, contributions at and delivery of results after meetings are vital to the Fishing Industry Safety Group and all its sub-groups."

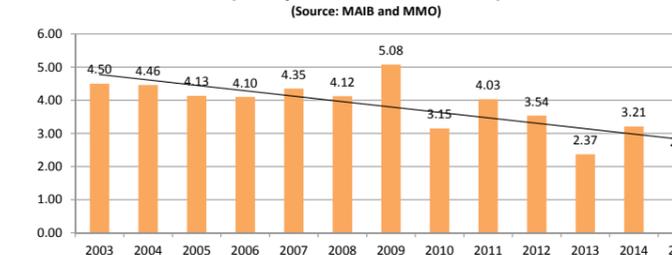
David Fenner, Head of Fishing and Code Safety, Maritime & Coastguard Agency

A spate of tragic fatal accidents between April-September 2016 resulted in a total of nine fatalities during the year, making 2016 a poor year for fishing safety. Thankfully there were no further fatal accidents after September 2016.

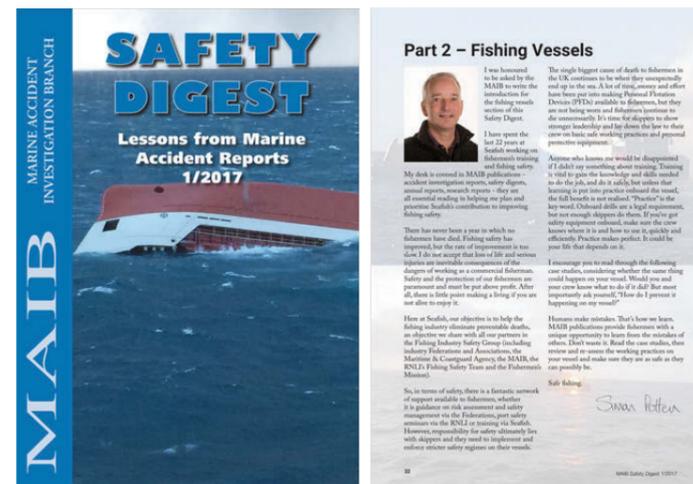
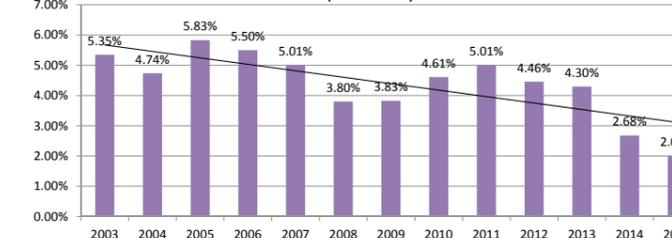
Despite this, the number of accidents involving fishing vessels reported to the MAIB continues to fall, as does the number of reported serious injuries to fishing vessel crew.

We remain fully committed to working with the fishing industry in pursuit of our shared goal of a year in which no fishermen die.

Reported Serious Injuries to Fishing Vessel Crew (rate per 1,000 fishermen)
(Source: MAIB and MMO)



Casualties to fishing vessels reported to MAIB (% of fleet)
(Source: MAIB)





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<p>Safety & Training: Fishermen's Training</p> <p>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.</p>	<p>FISHERMEN'S TRAINING DEVELOPMENT</p> <p>Develop new and existing courses and learning materials for fishermen in response to identified industry needs.</p>	<ul style="list-style-type: none"> The Department for Education withdrew its approval for us to develop a new Fishing Apprenticeship for delivery in England, owing to the industry's inability to meet new requirements for all Apprentices to be employed. We refreshed and re-launched our three-week Introduction to Commercial Fishing course for new entrants, adding an additional week for work experience. We refreshed and relaunched our e-learning platform for fishermen (seafishonlinetraining.co.uk). We re-developed and re-launched our suite of fishing vessel stability awareness courses.
<p>WORK PROGRAMME OVERALL KPI</p> <p>Provide 24,000 training places on mandatory and voluntary courses for fishermen.</p>	<p>FISHERMEN'S TRAINING DELIVERY</p> <p>Ensure the availability and effective delivery of Seafish's fishermen's training courses throughout the UK.</p>	<ul style="list-style-type: none"> We secured MCA and EMFF funding in excess of £1m to subsidise the cost to fishermen of undertaking additional voluntary training. Our network of Approved Training Providers delivered more than 5,000 training places to fishermen; in addition we received 2,500 logins from fishermen on our e-learning platform.
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <ul style="list-style-type: none"> 8,000 training places provided to fishermen. £1m of external funding secured to subsidise the cost of voluntary training to fishermen. 	<p>FISHERMEN'S TRAINING ADMINISTRATION</p> <p>Provide effective administrative support to training providers, maintain accurate records of fishermen's training and provide information, advice and guidance to stakeholders.</p>	<ul style="list-style-type: none"> We added more than 6,000 records to our fishermen's training database. We responded to more than 500 enquiries from fishermen, training providers, regulators and other stakeholders relating to fishermen's training and certification.
	<p>QUALITY ASSURANCE</p> <p>Audit all Seafish Approved Training Providers (ATPs) against our quality standards and arrange expert observations of Seafish Approved Instructors.</p>	<ul style="list-style-type: none"> We observed five of our Approved Instructors to ensure their effective delivery of our courses. We audited seven of our Approved Training Providers to ensure their compliance with our Quality Assurance standards. We organised a Conference for all our Approved Training Providers to share information and best practice.



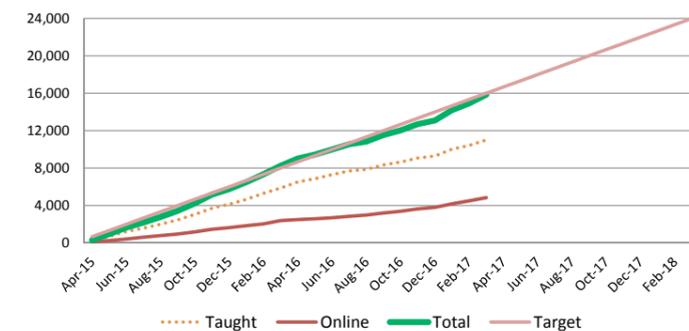
SAFETY & TRAINING: FISHERMEN'S TRAINING

Fishermen's Training

"It has been good to refresh these courses again after last doing them eight years ago, this almost certainly wouldn't have happened if I'd had to fund them myself. You never know when the knowledge gained may be useful, possibly even life-saving, so time well spent I reckon."

Anonymous fisherman on completion of refresher training for basic safety

Progress towards Fishermen's Training KPI Take-up of training places

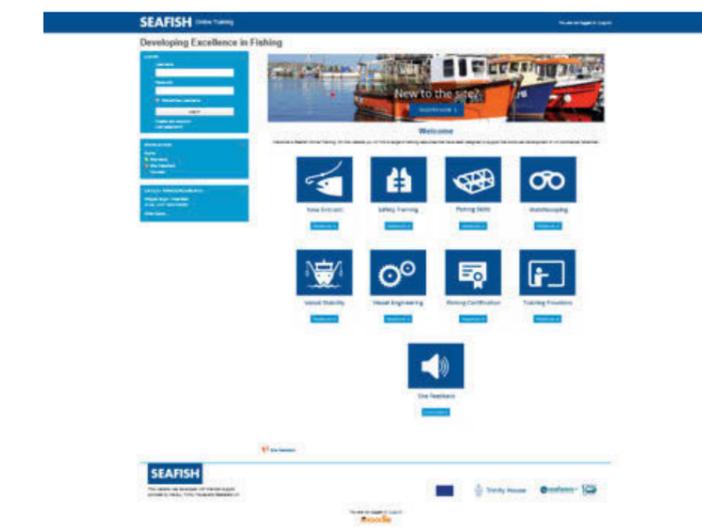
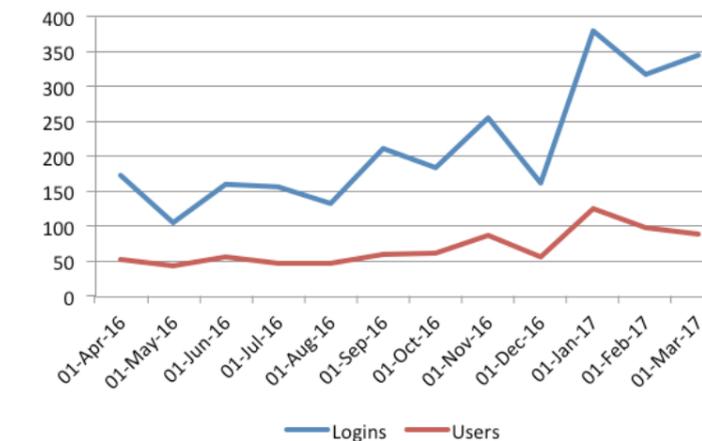


During the year we refreshed our online learning portal for fishermen: www.seafishonlinetraining.co.uk/ and relaunched it in January 2017, resulting in a sharp increase in usage. We now have over 3,650 registered users.

"The (Seafish) online training website is a fantastic tool and I found it extremely useful. When working through the engineering content I found the website easy to navigate."

Gary Walker, fisherman

Seafish Online Learning - usage





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<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 published four guides on product integrity issues including glaze, added water and QUID, seafood provenance and authenticity and maximising the quality and storage life of fresh seafood products.</p>
<p>WORK PROGRAMME OVERALL KPI</p> <p>Social/ethical risk factors developed and populated on RASS.</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 developed Tools for Ethical Seafood Sourcing (TESS) which is a comprehensive online tool signposting users to numerous resources and initiatives that support socially responsible business practices, helping them understand social responsibility and 'what to do' to address any issues in their supply chains. This was launched on 10 March 2017. We worked with our colleagues in the Responsible Sourcing team to help develop the methodology for identifying social risks in fisheries. We have updated briefing guides on different social responsibility issues and continued to convene our Seafood Ethics Common Language Group, with meetings covering a range of topics and issues. The Ethics in seafood webpages are regularly updated to ensure the information we have available is as topical and relevant as possible.</p>
<p>WORK PROGRAMME ANNUAL TARGET FOR 2016-17</p> <ul style="list-style-type: none"> • Develop the information hub for the seafood supply chain on integrity issues. • Produce a guide to ethical sourcing tools which can be used in RASS to help inform buyers when social/ethical risks are identified. • Complete a review of animal welfare issues in wild capture fisheries. 	<p>ANIMAL WELFARE</p> <p>To provide information and guidance on animal welfare issues in the supply chain.</p>	

SEAFOOD INTEGRITY

Social Responsibility (Ethics)

Seafish has developed a co-ordinated sector-wide response to social issues in seafood production, by introducing a series of integrated work activities with risk assessment and signposting tools, stakeholder engagement channels, industry briefings and the Responsible Fishing Scheme. These are helping the seafood industry eliminate unethical practices from UK seafood supply chains. Our overall work on ethics spans a number of teams in Seafish and this collaborative approach, both internally and externally, enables us to deliver a range of different activities to help the supply chain move forward on this issue. The focus of our ethics work this year has been on the provision of information and advice to facilitate common understanding in the supply chain, and to help guide further action.

The Seafood Ethics Common Language Group (CLG) continues to grow in popularity and reach. The packed agendas in January and July covered a diverse range of topics including: mapping and risk assessment; progress in Thailand; issues in the UK and Northern Ireland; monitoring and control; the Modern Slavery Act and the Transparency in Supply Chain clause: the current reporting landscape; the growth of new and collaborative initiatives; as well as global developments.

“The work that Seafish has done on ethical sourcing has made my job much simpler. I foresee TESS becoming an integral part of my role.”

Barry Harland, Head of Continuous Improvement & Corporate Social Responsibility, Whitby Seafood's Ltd.

The Seafood Ethics CLG has been the conduit for the development of a new online Seafish tool, Tools for Ethical Seafood Sourcing (TESS), which was launched in March 2017. With many different sources of information available on ethical issues in the seafood supply chain, from sources that identify and help to monitor an issue, through to international standards, guidelines and 'on the ground' initiatives that could be used to address the issues, it can be challenging for seafood businesses to understand this complex landscape. TESS is designed to help. It is aimed at seafood businesses who want to understand social responsibility and what they can do, as a business, to address any issues in their supply chain. It is a 'signposting' tool that provides a gateway to a wide range of helpful resources. TESS has been populated with content that we have identified as useful including information on legislation and operational guidelines, risk mapping tools, standards, collaborative initiatives and practical business support; as well as listing all those organisations who are working to support the industry, and improve governance, safety and welfare within the global seafood industry.

At the launch of Anti-Slavery Commissioner 1st Annual Report in October 2016.

“I would like to invite a representative from Seafish to speak about 'Private sector engagement' through the prism of what has been achieved since my appointment. I believe the partnership with Seafish during this year is one of the most successful examples and would like to share its achievements with a wider audience.”

Kevin Hyland, Independent Anti-Slavery Commissioner





Ports & Auctions

Seafish co-ordinates activities for the ports and auctions sector which is a vital route for fishery products entering 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 2016-17

- Development of responsible fishing ports standard.
- Website sections completed.

PROJECT

RESPONSIBLE FISHING PORTS STANDARD (RFPS) DEVELOPMENT

To develop a best practice standard to harmonise operations in many aspects of fishing ports. The potential benefits for individual ports participating within this programme will include the exchange of good industry practice and recommendations which will result in uniformity and structure in their operations.

PORTS AND AUCTIONS

Promotion of RFPS Outreach to the fishing ports sector and wider supply chain.

DELIVERY ON TARGETS 2016-2017

A Technical Committee was formed in 2016, tasked with developing a Code of Practice and Responsible Fishing Port Standard according to scope agreed by the RFPS Oversight Board. In the past year, working drafts of the Code of Practice and Standard have been developed and approved by the Technical Committee.

Development audits have been carried out at four fishing ports.

Ten major fishing ports were visited to discuss and help develop the RFPS.

Web pages have been created to provide a central source of information about this work and how it is progressing.

Stakeholder satisfaction score increased from 65% in year one to 67% in year two.

PORTS AND AUCTIONS

Ports and Auctions

Activities within the Ports and Auctions work programme have been developed in conjunction with the British Ports Association Fishing Ports Group (BPAFPG) to help address issues considered to be constraining the development of the sector. The core activity has been to progress the development of the Responsible Fishing Ports Standard that aims to raise standards in the fishing ports sector.

- In progressing this industry led scheme, members of the Technical Committee and other stakeholders involved in the development process have provided high calibre input and advice that has provided the foundation for the development of the Code of Practice and a Responsible Fishing Ports Standard, which is designed to be used for future assessment purposes.
- To help ensure that the initial version of the standard was robust and appropriate, we carried out four development audits at different fishing ports. This helped identify differing perspectives and needs, which has ensured that the initial draft standard was fit for purpose.
- To complement the development audits, we carried out four study tours of fishing port facilities, the findings of which have been incorporated into developing the standard and the Code of Practice.

- The development audits, study tours and wider ports outreach engagement have helped provide a greater understanding of the sector, and been an essential part of ensuring this industry led initiative is being developed with input from a wide range of stakeholders and reflects different types of fishing ports.
- In progressing the Responsible Fishing Ports 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.

“On behalf of the BPA Fishing Ports Group which I Chair, we are more than happy with our involvement with Seafish on the Responsible Fishing Ports Scheme. The progress that’s been made has been thorough and quite exhaustive in what is a benchmark for Industry. The work compliments the established RFS and in due course this will be valuable for the Ports sector in the future. We have been impressed by Seafish and how they have engaged with Ports and by how they have put the scheme to us.”

Martyn Boyers,
Chair of the British Ports Association Fishing Ports Group



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**

Three retailers and/or foodservice companies using RASS for sourcing seafood.

**WORK PROGRAMME ANNUAL
TARGET FOR 2016-17**

Five retailers, major processors and/or foodservice companies using RASS to inform their seafood sourcing policy.

PROJECT

RASS MANAGEMENT

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

RASS ETHICS DEVELOPMENT

Scoping of information appropriate to the expansion of RASS profiles. Content to include social ethical factors, aligned with the Seafood Integrity work programme. Work guided by RASS steering group.

**RASS AQUACULTURE PROFILES
DEVELOPMENT**

Expansion of RASS to include Aquaculture profiles. Work overseen by RASS steering group.

DELIVERY ON TARGETS 2016-2017

- 370 profiles now live, including regional profiles for Scotland and Shetland.
- All profiles updated with 2016 information, with protocols developed to increase transparency around profile maintenance and creation.
- Dashboard developed to monitor website performance and facilitate visibility on site use.
- Development of functionality to host outcomes of the Sustainable Seafood Coalition's risk assessment underway, to be launched May 2017.

- Partnership with Seafood Watch (Monterey Bay Aquarium), Sustainable Fisheries Partnership expanded to include Liberty Asia, with the development of the Human Rights Risk Tool for Seafood (HRRTS) well underway.
- The Risk Assessment Methodology has been finalised through the creation of several pilot fisheries and was peer reviewed during Autumn.
- All work has been collaboratively aligned to the Seafood Integrity programme.

- 100% EMFF funding secured to pursue development of aquaculture profiles and website.
- CEFAS contracted to lead the development of content for the 16 profiles.
- Website user testing currently underway and expected to be launched during summer 2017.

RISK ASSESSMENT FOR
SOURCING SEAFOOD (RASS)**Case Study – RASS supporting a growing
number of businesses**

To build on our understanding of how different types of businesses are using RASS, a series of interviews were undertaken to gather a deeper level of feedback and inform our approach to further development of the site. Exploring how businesses are using the information, whether the profiles are providing all the information users were expecting to find, and understanding what additional functionality can be built in, were all aspects of user feedback that our RASS Manager was hoping to establish.

The intuitive design of RASS was mentioned several times in the business interviews, and generally businesses could easily find the information they were after. However, given that the technical managers in these businesses are time poor, there were suggestions of trying to develop RASS in a way that would allow efficient data mining from RASS to their own procurement systems.

During 2017/18 we will look to consolidate data management processes to ensure that RASS fishery profiles are updated efficiently and continue to be quality assured by fisheries scientists. A key area that we will explore for RASS wild fishery profiles is providing businesses the option of exporting data from RASS in an Excel report, as this could be quickly cross-referenced against a business' seafood sourcing list. Improvements to visualisation of data through interactive mapping are also being explored.

"RASS is already a valued tool which helps steer our decision making and approach to responsible sourcing. We look forward to the continued development of the platform and are particularly interested how human rights risk assessment will be incorporated and build on the value the database already offer."

Joseph Prosho, Technical Manager, Morrisons

Morrisons are the fourth largest chain of supermarkets in the UK. They typically use RASS to provide information on fisheries that are not certified by a third-party (e.g. MSC), and the website provides a platform to check for conditions that may need to be applied for the approval of supply. They use RASS in balance with other resources including the MCS Good Fish Guide, and Fishsource.





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<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 SURVEY Interview owners and collect annual accounts of vessel businesses for reference year 2015. Data on costs and non-fishing income allow us to estimate economic variables as required and fulfil UK obligations under the EU's Data Collection Framework. We also produce other Seafish outputs based on data collected.</p>	<ul style="list-style-type: none"> We collected vessel accounts throughout the UK, and met sample size targets stated in the UK National Programme. Data were submitted in format requested by European Commission, before the deadline. Work was carried out in the manner set out in the contract, achieving KPIs agreed with the MMO. We increased face to face interaction with stakeholders promoting and enhancing Seafish's reputation and getting vessel owner input on issues currently affecting fleet economic performance.
<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</p> <p>Collect processing sector business accounts for reference year 2015. Accounts data and census data together allow us fulfil UK obligations under the EU's DCF and to produce other Seafish outputs.</p>	<ul style="list-style-type: none"> We collected annual accounts from processors in all FTE bands and met targets in the UK National Programme. Processing sector financial data were not requested by JRC. Data gathered built upon our knowledge of the processing sector and will feed into future reports. Work was conducted during January to March 2017. We achieved the minimum of 10% sample size in every size band of processors with an overall coverage of 20% of the population, exceeding the target in three of five segments. We collected additional data on labour in the sector.
<p>WORK PROGRAMME ANNUAL TARGET FOR 2016-17</p> <ul style="list-style-type: none"> Compliance with all DCF data submission and data quality requirements. An annual increase in the level of industry participation in Seafish surveys. 	<p>BIENNIAL PROCESSING SECTOR CENSUS</p> <p>Contact every fish processing business in the UK and collect data for every factory/unit on type of fish processed; type of processing conducted; number of employees; contact details.</p> <p>Produce updated time series of processing sector analysis.</p>	<ul style="list-style-type: none"> We conducted a census and collected data on fish type, processing type and employment relating to all UK fishing processing companies. We updated our database so that UK DCF datasets are ready to upload when required by EU obligations. Data collected feeds in to Seafish processing sector report under Analysis and Evidence programme.

Fleet

During the Fleet Survey conducted in 2016/17, a record number of interviews were carried out (40% increase on 2015/6 survey) and subsequently a record number of fishing vessel accounts were submitted to Seafish during the data collection phase (22% increase on 2015/16 survey).

There was also improved engagement with fleet segments from which only a few vessel owners had previously taken part in the survey.

This was the first year since the beginning of Seafish fleet economic surveys that we conducted interviews and received accounts for every Seafish-defined fleet segment.

Seafish Segment	Number of Accounts 2014*	% of total segment	Number of Accounts 2015	% of total segment
Area VIIB-K 24-40m	0	0%	2	8%
Longliners	1	3%	2	8%
Under 10m drift and/or fixed nets	15	6%	19	9%

*Does not include additional 2014 accounts collected in 2017.

Processing Sector

After a successful Census, the accounts collection phase of the processing financial survey exceeded all targets (24% of all companies compared to 21% in the survey conducted the previous year).

In addition, the team completed a short labour survey, requested by industry, on behalf of DEFRA.





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 2016-17

Publish: fleet economic report; 2016 fleet economic time series data set; 2016 Quay Issues magazine; 2016 Processing sector report.

PROJECT

SEAFISH ECONOMIC REPORTS

- Fleet economic Report 2014.
- Fleet economic time series Excel tables 2015 / 2016.
- Fleet economic time series printed report 201 / 15.
- Seafish fleet magazine – Quay Issues, 2016.
- Processing sector report 2016.
- UK Seafood Industry Map.

FISH PRICES SIZE DEPENDENCE STUDY

- This study will examine the influence of fish size on fish price within the same species at Peterhead market.

ECONOMIC IMPACT ASSESSMENTS

- Fisheries management options, e.g. the landing obligation.
- DiscardLess – EU project.

FLEET ENQUIRY TOOL

- For use by Seafish to answer queries.
- For use by public as online tool.
- Collaborate with MMO and Kingfisher.

DELIVERY ON TARGETS 2016-2017

- We published our annual fleet economic report relating to 2014.
- We published our annual update of fleet economic time series, including expanded content, in Excel (for 2016, published March 2017) and printed copy (for 2014 / 15, published July 2016).
- Published and disseminate 2016 edition of Quay Issues magazine.
- Published biennial processing sector report, including Excel tables.
- Produced and distributed confidential vessel benchmark reports.
- Published an updated map of the UK seafood industry.
- Publish the first edition of the UK Seafood Industry Dashboard (not in annual plan).

- We did not complete the quantitative analysis of fish size and price. This work was delayed in favour of economic analysis work relating to Brexit. The work will be done in 2017.
- Evidence will be published to inform impact assessments relating to the landing obligation.

- We presented and published our analysis of economic impacts on UK fleet of the landing obligation.
- We published and presented economic impact assessments for key fisheries management systems, e.g. value of EU / Faroe bi-lateral agreement; scallop sector analysis; non-EEA labour in the fleet; proposed EU import ban on live American lobsters.
- We continued work on the EU project DiscardLess.

- We developed a software tool to explore and interrogate fleet economic time series data which we use for fleet enquiries and regular reports.
- We aim to have an online tool in 2017 / 2018.



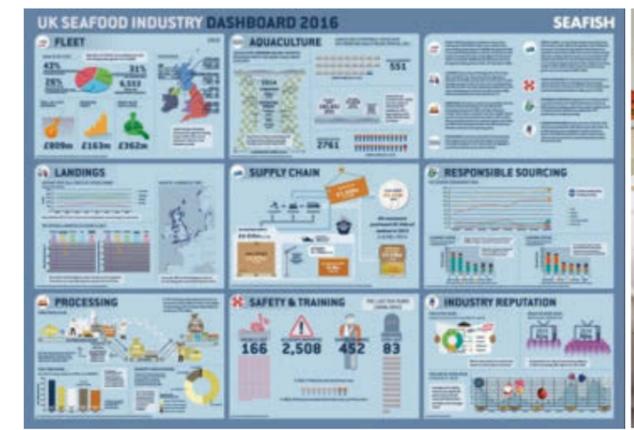
ECONOMIC ANALYSIS AND EVIDENCE

Economic Analysis and Evidence

“A big thank you on behalf of the pelagic sector for undertaking this valuable piece of work. Our hope is that the information contained in the document will be instrumental in breaking the current (un-documented) Faroese mackerel access arrangements.”

Ian Gatt (Chief Executive of the Scottish Pelagic Fishermen’s Association) on the EU / Faroe Bilateral agreement evaluation

Our regular suite of reports was expanded to include the UK Seafood Industry Dashboard and a new version of the much-requested Sea Fish Industry Map. The team also produced for a very popular YouTube film and a YouTube animated film, as well as several well-received webinar presentations.





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 2016-17**

Successfully deliver (300+ delegates) 2016 conference for International Institute of Fisheries Economics & Trade in Aberdeen; contribute to two STECF plenary and two expert working groups; organise two UKFEN meetings; prepare two papers for submission at EAFE conference 2017.

PROJECT

**INTERNATIONAL INSTITUTE
OF FISHERIES ECONOMICS
AND TRADE (IIFET) 2016
CONFERENCE**

Conference planning and promotion.

GENERAL ECONOMIC ADVICE

Appropriate advice readily available for key stakeholders.

DELIVERY ON TARGETS 2016-2017

- We delivered the conference in Aberdeen from 11th – 15th July 2016, with additional workshop on getting published before the conference and industry tour in NE Scotland after the conference.
- We exceeded our target of 300 delegates to attend the conference by 50.
- We held a very successful Industry and Policy day, exceeding our target of 30+ additional IG-P delegates, actually achieving 50 additional delegates.
- We had excellent feedback from delegates to the conference.
- We achieved good press coverage and publicity for Seafish in relation to the conference, including a three-page spread in Fishing News.

- We continued to facilitate, fund and chair the UK Fisheries Economics Network holding two regular meetings and planning a technical workshop.
- We answered around 90 ad-hoc enquiries from industry and government.
- We presented on the LO at the European Parliament.
- We carried out bespoke analyses and gave expert advice on the Welsh industry, the crab sector, the pelagic sector.
- We contributed to government and industry meetings, e.g. Seafood 2040 for Defra, the Scallop Industry Consultation Group, the English Scallop Stock Assessment Project Board, the NE Scotland Fisheries Forum, Defra stakeholder meetings with the processing sector.
- We contributed to STECF plenary meetings and expert working groups.
- Two papers accepted at the European Association of Fisheries Economics conference 2017. Three papers presented at IIFET 2016; we organised a special session on the landing obligation. the landing obligation.

ECONOMIC ADVICE

We held the IIFET 2016 conference in Aberdeen and it was hailed as one of the most successful IIFET conference ever. The conference had 356 full delegates and an additional 50 delegates for Industry & Policy Day, which was held as an integral part of the overall conference on 13th July.

IIFET feedback received in emails after the conference:

"IIFET 2016 Scotland was a rousing success! Many thanks to the whole Scotland Team."

Ann Shriver, Executive Director, IIFET, USA

"Thank you for organising this event, which has been by far the best discussion about finding solutions for the landing obligation. I have also made many interesting contacts for my next adventure."

Ernesto Penas Lado, Director of Policy development and coordination, DG MARE, European Commission

"Congratulations for a truly wonderful conference. Everyone I spoke with had only very positive things to say about it. It was brilliantly organized."

Ingrid Kelling, Fisheries Policy Analyst, OECD, France

"Great organisation from start to finish."

Erik Lindebo, Senior Consultant, Environmental Defense Fund, Belgium

"Nice work on the conference... and I know how much work it is! It was great!"

James Anderson, Director, Institute for Sustainable Food Systems, University of Florida, USA



"I really enjoyed it and well done to you for organising a super day – lots of stimulating inputs which have enriched my thinking!"

Mike Palmer, Interim Deputy Director, Food, Drink and Rural Communities, Scottish Government

"I found the Policy day on 13 July to be an extremely useful meeting. Some of us said that day 'this information should have been available prior to the final decision making process'. We are now entering a complex and crucial phase of the implementation of the landings obligation in 2019. This, in conjunction with the revision of technical conservation measures. Against the background of the now imminent Brexit and discussions (in whatever shape or form) of a mixed fisheries plan for the North Sea. In that respect, in my opinion, a (repeat) initiative for such a Policy Day (sometime mid 2017) would be most welcome."

Willem (Pim) Visser, President, European Association of Producers Organisations



COASTAL FLV	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 BURHARD 4	7.20	1.40	KINGF



PROGRAMME

Reducing Red Tape

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

WORK PROGRAMME
OVERALL KPI

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

WORK PROGRAMME ANNUAL
TARGET FOR 2016-17

Increase opening rates of monthly and weekly communications by 10%.

Four assured guides published.

PROJECT

REDUCING RED TAPE

Horizon Scanning for EU/UK developments in regulation with potential to impact on the seafood supply chain.

Stakeholder Engagement to promote proportionate regulation. Build and maintain key relationships with appropriate competent authorities and UK/EU industry representatives from all sectors to agree a UK position on proposals.

Communication
Disseminate monthly updates on Seafish Regulation team engagement activities and weekly UK/UK update monitors. Produce seafood specific guidance on compliance. Where appropriate working with primary authority to give business confidence of legal compliance.

DELIVERY ON TARGETS 2016-2017

Stakeholder Engagement

- We held two importers forums and three seafood legislation expert groups. Both bring industry and regulators together to share information and discuss current issues. Both groups have been reviewed and remodelled to improve membership and outputs.
- We have participated in the work of five government groups to progress better regulation and consistency on exiting the EU.

Issue resolution

We have resolved several issues on behalf of industry. These have included:

- The fraudulent transformation of tuna.
- Resolved an issue with new Commission regulation whereby the 'end use' procedure giving access to zero tariff goods was unavailable.
- Prevented Canadian lobsters being listed as an invasive alien species.

Stakeholder Communications

We sent out weekly updates on Brussels and extended to Brexit coverage post referendum. We also increased our use of social media to reach new stakeholders. We received 84 requests to receive newsletters directly.

Guidance published

- Industry guidance on re enforced checks at import published.
- Article and Q+A produced on possible effects of Brexit, Great repeal bill and the later white paper.
- Published an information sheet on tariffs. It maps out the standard tariff schedule as well as tariff reductions.

REDUCING RED TAPE

Supporting Proportionate Regulation

Our goal is to ensure seafood regulation is proportionate and we work with industry and regulators to identify potential issues as early as possible. The process of achieving this can vary with each issue and is complex and time consuming.

When fraudulent tuna was found to be entering the UK, we helped industry highlight the issue to the Commission and secure a resolution. A vegetable extract legal in other member states was being used to change the colour of brown tuna meat to a fresher looking red meat. Seafish helped to clarify the relevant legislation and take the issue to the Commission.

The Commission agreed with our position and issued a statement confirming the illegality of the process. However, the new clause still permitted the use of the additive, so we went back to the Commission once more to clarify that it was the transformation that was fraud whatever the process. The Commission clarified the situation and began procedures for enforcement action in the EU.

The 'end use' special procedure allows certain raw materials to enter the European Union under low or zero tariffs. The special tariffs apply to goods earmarked for particular end use (i.e. processing or handling); if the goods are diverted from the specified end use, the lower tariffs no longer apply and the difference has to be paid to HMRC. The new Union Customs Code did not allow the transfer of end use liability to the buyer. This meant that the importer remained responsible for the discharge of the end use even when the goods were no longer under the

importer's control. Seafood importers felt unable to sell end use goods, which meant that processors were unable to access end use goods. Working with our Government and industry partners, we took the issue to the Commission, which subsequently introduced a new procedure in its implementation guidance to allow the transfer of end use liability between businesses.

"Thanks for your work on this; I don't think we'd have got very far without the help of you, AIPCEE and the trade organisations."

Clare Stead, Fastnet

Proposed wildlife legislation to class American lobsters (*Homarus Americanus*) as invasive species would bring trade in live American lobsters to a halt. Seafish studied the regulatory proposal and the relevant administrative processes within the Commission's Environment Directorate, and also met with US and Canadian exporters, US and Canadian government officials, EU lobster importers, UK lobster importers and relevant Defra workers. The Seafish Science Advisory Group, and the Seafish Economics team provided reports. By working together we were able to ensure that DG Environment chose not to list *H. Americanus* as an invasive species and instead recommended that member states implement national measures that are not disruptive to business





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 2016-17

10% increased sentiment from baseline.
Opening rate for newsletters increases from baseline of 30%.

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 2016-2017

- We produced 632 data reports, covering retail, foodservice and trade data, exceeding our target of 250.
- Our newsletter, highlighting new information and reports, was circulated an average of 604 subscribers each month, exceeding our target of 575.
- We presented data at six different roadshows and stakeholder meetings throughout the year.
- We added three new factsheets to our suite of market insight summaries to facilitate understanding of key market areas; chilled seafood in multiple retail, frozen seafood in multiple retail and ambient seafood in multiple retail.
- Stakeholder satisfaction score increased from 65% in year one to 67% in year two.

Advice is provided to businesses, seafood stakeholders and the media on request. Using estimated values, we delivered £200,000 of advice over the year.

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.

Seafood businesses can subscribe free of charge to our monthly updates to receive the latest reports and insight across retail, foodservice and trade. In the past year, we have increased the number of stakeholders we engage with, providing more reports to more people.

Our Market Insight events have attracted businesses looking for the latest trends, finding out how seafood is performing in the competitive retail and foodservice markets, and looking for opportunities for positive market growth.

“I regularly use the Seafish retail audit data and HomeScan Panel data to better understand what is happening in the relevant categories. I quite often ask for tailor made reports to be prepared on top of the standard presentations available, as these add real value to the data and have given me insight into areas to which I would not otherwise have had access. The team always provides a very fast and reliable service, which is extremely useful and has helped deliver incremental opportunities”.

John Ashmore, Marketing Director Europe, Middle-East and Africa. Clearwater Fine Foods (Europe) Ltd

“The Market Insight team have great knowledge of the sector - they have helped us best utilise the available data.”

Sarah Andrews, Economist, EU, Marine and International directorate, Department for Environment Food & Rural Affairs





PROGRAMME	PROJECT	DELIVERY ON TARGETS 2016-2017
<h2>Technology</h2> <p>The 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>	<h3>GEAR SELECTIVITY TRAINING</h3> <p>Ongoing development of the Gear Database Website and expansion of content of the gear database and selectivity device profiles.</p>	<ul style="list-style-type: none"> 53 fishing gear profiles available, all with a gear description and illustration of the gear. Many also have comments on selectivity, environmental impacts, relevant videos and links to reports for further information. Profiles on 21 of the more commonly used selective devices are available with similar information available. Development of the database is ongoing.
<h3>WORK PROGRAMME OVERALL KPI</h3> <p>100 fishermen trained in gear technology and selectivity with follow up testimonials.</p>	<h3>GEAR DATABASE</h3> <p>Training of fishermen and others in gear technology.</p>	<ul style="list-style-type: none"> A gear technology course at Hirtshals flume tank was delivered in November to 24 international participants. Funding applications submitted for further courses to run for UK fishermen during 2017.
<h3>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</h3> <p>30 fishermen trained in gear technology.</p>	<h3>GEAR TECHNOLOGY ADVICE</h3> <p>Provision of detailed technical advice on design and operation of fishing gear and fishing operations.</p>	<ul style="list-style-type: none"> Over 160 enquiries answered with an estimated value in excess of £250,000. 700 downloads of fishing methods booklet and over 500 hard copies have been distributed. Technical advice being provided regularly to GITAG project in Scotland, Northern Ireland Selectivity project and Cefas in England.
	<h3>TECHNOLOGY RESEARCH</h3> <p>Support research into new and innovative fishing technology developments.</p>	<ul style="list-style-type: none"> Worked closely with GITAG in Scotland in reviewing more than seven selectivity projects suggested by industry. In depth involvement with two GITAG projects to design an inclined net grid and square mesh codend in collaboration with two Scottish skippers. Working with Northern Ireland Selectivity project to encourage industry to come forward with suggestions for reduction of discards in their fishery. Sea trials in conjunction with Cefas to develop low headline trawl for fisheries in SW England.

TECHNOLOGY

Gear Database

The gear database already holds a vast amount of information on fishing gear and selective devices. It has gradually been developed over the year to include information on over 50 different methods of fishing and explanations of over 20 of the more commonly used selective devices used to reduce discarding. The benefits of the database have been acknowledged by the Gear Innovation and Technology Advisory Group (GITAG) in using it as an aid in assessing proposals for selectivity projects.

“The gear DB looks good and I like the way for each gear you have a smart layout with windows to other relevant topics such as by-catch and reports, etc.”

Marine Scotland Science who undertake much of the gear research, Scotland

The database is also used by many other organisations to access information on gear and discard reduction. Several companies that supply equipment to the fishing industry have also found the database useful.

“We had a look at the new site – I think this will benefit many to have all this information in one place.”

Francis Parrot, MD of fishing vessel electronics company Notus Electronics, Newfoundland

Supporting collaboration between industry and Government bodies through GITAG

During the year the support Seafish have provided through the Technology Research project has been instrumental in initiating two interesting and innovative projects with the GITAG project in Scotland, helping to demonstrate the valuable links between the different aspects of this work area. The initial ideas for both projects were studied as part of the standard syllabus during Gear

Technology and Selectivity flume tank training courses, the two skippers then looked at similar concepts within other fisheries and, in collaboration with our Seafish Gear Technologist, designed and constructed the innovative selective devices to suit their own gear set up, one being twin-rig nephrops gear and the other pair seine.

The twin-rig gear has been in use for almost a year now with very good results at separating nephrops from fish providing the skipper with improved catch quality and the possibility of further size/species selection of fish. The pair seine innovation involves a complete re-design of the net’s codend and extension to convert it from the traditional diamond shaped mesh to square mesh and from two-panel to four-panel, to allow an efficient release of immature fish from the gear.

“The success of any industry is when information and knowledge is shared freely amongst stakeholders. When this happens we are all better informed allowing us to use that knowledge to drive innovation and become better custodians of the seas.”

Mike Montgomerie’s experience and knowledge in net and gear technology shows no bounds, and we are able to use that information to improve our fish capture in a way that will lead to long-term sustainability that sets us apart in being responsible harvesters of the seas.”

Jimmy Buchan, owner of the twin-rig vessel on the work that has been done on his gear by Seafish, through the GITAG project

Further work with both projects continues into 2017.





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 2016-17

- Opening rate for newsletters increases from baseline of 38%.

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 2016-2017

- There are five groups that meet and receive a monthly new alert, and a sixth group that receives regular news alerts.
- The number of stakeholders engaged with the groups increased to 1,347 over the year, exceeding our target of 1,200.
- 417 stakeholders attended the 10 meetings held during the year. In addition we ran two Common Language meetings on Brexit and a Social License to Operate and these attracted a further 91 attendees.
- Feedback scores from meeting attendees were over 8 out of 10 across all meetings.
- Across all the groups, 40% to 60% of recipients are opening and reading the information provided in each newsletter they receive.
- Stakeholder satisfaction score increased from 65% in year one to 67% in year two.

- 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 39,000 times over the course of the year.
- All the associated web pages have been kept up-to-date.

INDUSTRY ISSUE GROUPS

Reflecting topical and current issues

Our industry issues groups represent a co-ordinated sector-wide response to issues that could potentially affect seafood production and the reputation of the seafood industry. The groups cover a diverse range of issues: the environment (fish stock status, fisheries management, marine conservation); policy concerns (the Common Fisheries Policy, the landing obligation); product integrity (Illegal Unreported and Unregulated fishing, seafood fraud, certification and standards); seafood ethics (human rights); as well as aquaculture, pelagic and fishmeal interests. The groups are an invaluable way for industry to learn about new issues and to be kept to up-to-date on the latest developments and initiatives within their area of interest. To keep abreast of current topical issues in 2016 two special Common Language Group meetings were held. The first focussed specifically on the issues surrounding the exit of the UK from the European Union, and the second explained the concept of a social license to operate and the reasons for attaining and building high quality stakeholder relationships in this way.

Positive engagement and feedback

The groups are facilitated by Seafish and the feedback from attendees shows 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. Between April 2016 and March 2017 the number of stakeholders engaged with the groups has increased to 1,350, all of whom receive a regular newsletter. Our feedback shows that 40% to 60% of recipients are opening and reading the information provided in each newsletter they receive.

On the Common Language Group Brexit special:

"I thought the presentations highlighting the opportunities surrounding Brexit were particularly informative and thought-provoking. I think we would agree that there is a great deal of uncertainty at present, but I do believe that, in the longer term we will have a very vibrant and profitable fishing industry!"

Jeremy Ryland Langley, Aquaculture and Fisheries Manager, Waitrose Ltd.

"Feedback on the Issues Group meetings as a whole: Interesting presentations... a relevant mix... a good range of well-informed speakers with lots of good information pitched at the right level... good range of presentations with no duplication all around a critical topic... an opportunity to learn about the issues... a fantastic networking opportunity."

Thank you for the excellent work that Seafish are doing for the industry and to deliver such informative sessions."

Nigel Edwards, Technical and CSR Director, Icelandic Seachill and Chair of the Seafood Alliance





PROGRAMME

Tailored Advice

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

WORK PROGRAMME
OVERALL KPI

Provide clarity and guidance on fishery data and sustainability issues, both proactively and reactively, to facilitate decision making in the supply chain, to the value of £100k during 2016-17.

PROJECT

TAILORED ADVICE

- Provide expert input into projects and technical working groups to support continuous improvement in the methodology of fisheries management.
- Provide guidance, information and/or clarification on a wide range of subjects and issues.
- Use the enquiry logging system to enable real-time monitoring of our Tailored Advice service.

RESPONSIBLE SOURCING
INFORMATION

- Prepare six factsheets on new/emerging issues for Seafish e-Textbook.

DELIVERY ON TARGETS 2016-2017

- £112,000 of enquires from stakeholders answered and logged on the Customer Relationship Management (CRM) System.
- Provided scallop dredge selectivity information to the Scientific, Technical and Economic Committee for Fisheries in relation to management of the English Channel scallop dredge fishery.
- Presented to the SWPO Brixham scallop seminar on scallop fishery management.
- Contributed to ICES workshop (WKLIFE VI) on developing Data-limited stock assessment methods.

Seafish publishes a range of Responsible Sourcing guides and these need to be updated regularly. This year the following guides have been updated and improved:

- Responsible and sustainable sourcing.
- Illegal, Unreported and Unregulated Fishing.
- Marine Protected Areas.

We have also produced a number of information sheets on the following topics:

- Why do agreed TACs not always match the ICES scientific advice?
- Why has the cod stock recovered in the North Sea?
- Global Sustainable Seafood Initiative.
- Fish Stock assessment models and ICES reference points.

These information sheets and the Guides will form a basis for the Seafish e-Textbook.

TAILORED ADVICE

Tailored advice support to scallop dredge fisheries management

Scallop dredging is an important fishery in the UK, with landings of around 45,000 tonnes, worth around £60 million in 2013. However, scallops are not assessed by ICES and management consists mostly of technical measures; minimum conservation reference sizes (minimum landing size), stipulations on dredge design characteristics and controls relating the number of dredges used to the distance offshore. In some areas there are restrictions on fishing within Marine Protected Areas due to the perceived effects of dredging on habitats of conservation importance.

The ICES working group WGSCALLOP has been collating knowledge in relation to scallop stock assessment and environmental impact and Cefas has been researching stock assessment measures sponsored by Defra. The South West Fish Producers Organisation (SWFPO) has been investigating the effects of dredge design on selectivity. Seafish's Sustainability and Data Advisor, Bill Lart, has particular expertise in understanding scallop dredge selectivity and environmental effects because he co-ordinated the innovative ECODREDGE project in the 2000s. The information and experience gained from this work has been used to advise the SWFPO and the Scientific Economic and Technical Committee for Fisheries (STECF) in relation to a French proposal on management measures into the Eastern English Channel scallop fishery. The results of the trial and advice to STECF significantly clarified the implications of the options; discussions with the French are ongoing.

The SWFPO organised a seminar in Brixham in October 2016 to review scientific knowledge on stock assessment and environmental effects of scalloping chaired by Professor Kevin Stokesbury Chair of the Dept. of Fisheries Oceanography, University of Massachusetts and also chair of the ICES WGSCALLOP. This enabled scientists and industry personnel to discuss possible stock assessment methods drawing on American experience. Bill Lart presented findings from the ECODREDGE project and subsequent work and discussed possible options for improved use of data from the commercial fishery to understand better the fisheries' environmental effects.

“Your technical knowledge and expertise has been the benchmark for the scallop fishing sector for many years and we always appreciate your willingness to assist with studies and trials of innovations that may improve selectivity and reduce benthic impact.”

Jim Portus, CEO, SWFPO





PROGRAMME

Safety & Training: Marine Survey

To provide the catching sector with a safety construction standard for vessels less than 24m registered length, along with providing associated survey / advisory services.

WORK PROGRAMME OVERALL KPI

600 contracts secured for vessel survey and inspection and 1,500 enquiries logged by end March 2018.

WORK PROGRAMME ANNUAL TARGET FOR 2015-16

- 200 vessels surveyed / inspected.
- 500 enquiries logged.

PROJECT

NEW BUILD CERTIFICATION

Survey and certification of new build vessels, including construction standards development, to provide the catching sector with a new build safety standard.

REGISTRATION INSPECTIONS

Inspection of existing vessels in comparison to the Seafish Construction Standards; to raise standards of existing vessels wishing to register as a commercial fishing vessel.

CONSULTANCY

Ad hoc consultancy projects, to include fishing vessel modifications, new build IFCA survey/patrol vessels, tonnage measurements, drawing approvals and condition inspections.

ADVICE TO INDUSTRY

Attendance at industry safety meetings and exhibitions.

Creation of Seafish Information Notes.

DELIVERY ON TARGETS 2016-2017

- We oversaw the construction of 72 new fishing vessels, ensuring their compliance with Seafish construction standards.
- We reviewed and updated our construction standards for 15-24m fishing vessels and published our new standards in February 2017.

- We inspected 94 existing vessels against our construction standards and reported to the Maritime & Coastguard Agency on their suitability for registration as commercial fishing vessels.
- We met with the Maritime & Coastguard Agency to review procedures, roles and responsibilities regarding the conduct of registration inspections.

- We completed 10 consultancy contracts for the fishing industry and related maritime industries on vessel design, construction, outfit and modification, including the design of a new fisheries patrol vessel for the North West IFCA.

- We responded to 564 enquiries on fishing vessel design, construction, outfit and modification, providing free expert advice with an estimated value of £271,500.
- We attended two meetings of the Fishing Industry Safety Group's Vessel Standards and Stability sub-group.
- We attended the Skipper Expos in Aberdeen and Bournemouth and delivered stability demonstrations.
- We published one Seafish Information Note (SFIN17) covering new requirements regarding carbon monoxide detection within our Under 15m standards.

SAFETY & TRAINING: MARINE SURVEY

Marine Survey

"This was the first vessel my yard has built to Seafish standards and the whole experience was first class from start to finish. We look forward to working with Seafish again."

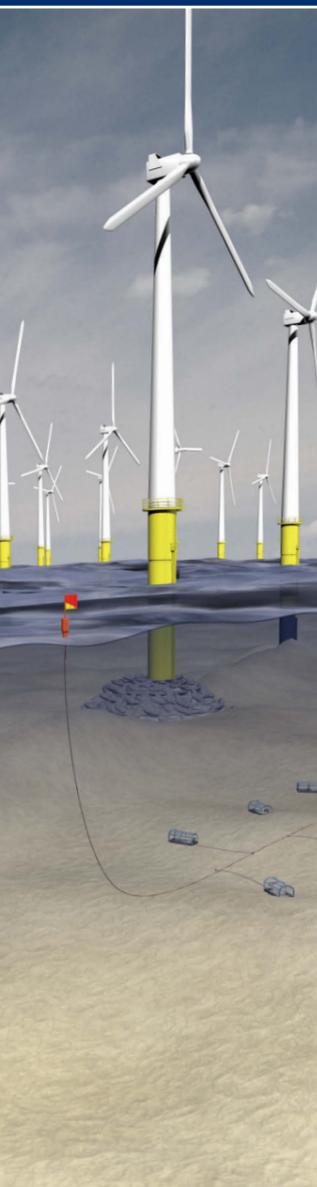
Lee Mooney, Managing Director, Mooney Boats

During the year we reviewed, updated and (on 1 February 2017) re-published our construction standards for fishing vessels of between 15m length overall and 24m registered length.

At the Aberdeen and Bournemouth Skipper Expos our Marine Surveyors conducted 34 stability demonstrations for skippers of under 15m fishing vessels. The demonstrations included the Wolfson Mark, Heel test, Roll test, vessel modifications, free surface effect and swamping. Each skipper was supplied with a copy of MGN503, information about the Wolfson Mark and a memory stick from the RNLI with copies its fishing vessel stability videos on. Their reaction and feedback we received was 100% positive and hopefully we got a number of skippers looking at the stability of their vessels.

Our Marine Surveyors also issued a number of Damage Control Kit Bags, Safety Folders and Personal Flotation Devices (PFDs) to fishermen on completion of their new-build vessels. Pictured is Liam Jones from North Wales, owner of MFV Kingfisher BM518 receiving his Damage Control Kit Bag.





PROGRAMME

Safety & Training: Kingfisher Information Service

Continuation and extension of the Kingfisher service to include fishermen's training and Marine Protected Area mapping.

WORK PROGRAMME OVERALL KPI

Chart and broadcast offshore information to improve fishing safety around man-made structures and activities.

WORK PROGRAMME ANNUAL TARGET FOR 2016-17

- Supply of more than 5,000 oil and gas industry fishing plotter CD/USBs.
- Supply of more than 2,500 cable and renewable fishing plotter CD/USBs.
- Supply of more than 25,000 Kingfisher Bulletins, online news items and new educational elements.
- Supply of more than 1,000 Danish cable protection fishing plotter files.

PROJECT

FISHSAFE
Supply of offshore oil and gas industry positional information to improve safety awareness and prevent accidents.

KIS-ORCA
Supply of offshore cable and renewable energy industry positional information to improve safety awareness and prevent accidents.

KINGFISHER BULLETINS
Supply regular updates on offshore activities and hazards to improve understanding of potential dangers.

DKCPC
Supply of Danish offshore cable industry information to improve safety awareness and prevent accidents.

MARINE PROTECTED AREAS (MPAS)
Investigate the feasibility of mapping the location of MPAs and their impacts on fishing activities.

FISHERMEN'S TRAINING
Develop an Offshore Awareness training course.

DELIVERY ON TARGETS 2016-2017

- We supplied more than 5,000 fishing plotter CD / USBs to stakeholders.
- We recruited a new Spatial Data Manager.
- We developed an innovative improvement specification with project funders to deliver project advancements over the coming years.

- We supplied more than 2,500 fishing plotter CD / USBs to stakeholders.
- Increased wind farm project coverage, with more than 30 offshore wind farms now included.
- We attended Skipper Expos in Aberdeen and Bournemouth and also attended the Norfishing Exhibition.

- We supplied more than 25,000 Kingfisher Bulletins to stakeholders.
- We launched our new Talking Points publication to explain offshore industry complexities and dispel myths.
- We secured internal approval for a £125,000 investment programme over the next three years to develop and improve the Kingfisher service.
- Delivered bespoke offshore hazard charts which were frequently issued via our @Kingfisherinfo account on Twitter.

- We supplied more than 1,000 fishing plotter files to stakeholders.
- DKCPC discussing the future provision of this information with European Sub-Sea Cables Association.

- We drafted an Expression of Interest for submission to MMO to determine whether this development would be eligible for EMFF funding.

- We made good progress with the development of learning materials for use in taught courses and online learning. Will be launched for delivery during 2017.



SAFETY & TRAINING:
KINGFISHER INFORMATION SERVICE

"This is a great step forward, providing fishermen with all the rapidly changing offshore information, on a single card for vessel charting systems."

Steven Alexander, Managing Director of Scottish Fishermen's Federation Services Ltd, commenting on the advancement in delivery of FishSAFE and KIS-ORCA data to a single Kingfisher USB card.

During the year we published the first edition of our Kingfisher Bulletin Talking Points publication designed to improve fishermen's understanding of the offshore industries around our shores.

"We are pleased to continue our collaboration with Seafish in the promotion of vessel safety and risk prevention and this year we include (in with their insurance renewal letters) their recent publication on offshore structure safety."

Craig McBurnie, Sunderland Marine Insurance

During the year we approved plans to invest £125,000 in improving our Kingfisher Bulletin service. Modernisation is required to streamline internal practices and take advantage of improved digital delivery forms, changing the Bulletin into a more interactive and visual service. Investment will establish the Bulletin as a modern, attractive and 'fit for purpose' which we hope will convince our funders to continue their support for many years to come.



Our development of a syllabus for 'Kingfisher Offshore Awareness' training will help to inform and educate fishermen about the hazards of fishing close to offshore industry structures and activities and will help to raise Kingfisher's profile amongst fishermen.

In collaboration with UK Trade & Investment, we hosted (at our Grimsby office) a visit from a Taiwanese delegation keen to learn more about how the UK fishing and offshore industries interact and coexist.



PROGRAMME

**Domestic
Aquaculture**

Guided by the Seafish Aquaculture Advisory Committee, the Domestic Aquaculture Programme will deliver projects to support and expand the UK aquaculture industry.

WORK PROGRAMME OVERALL KPI
National Government's belief that the Seafish Domestic Aquaculture Strategy programme has contributed positively to the development of national strategies - measured by testimony.

**WORK PROGRAMME ANNUAL
TARGET FOR 2016-17**

Positive testimonies received from key aquaculture industry representatives and policy makers in each devolved nation.

PROJECT

**SEAFISH DOMESTIC
AQUACULTURE ADVISORY
COMMITTEE (SDAAC)**

Establish the committee which will oversee and advise on the delivery of the Domestic Aquaculture Strategy.

**ENGLISH AQUACULTURE
STRATEGY (EAS)**

Completion and delivery of English Aquaculture Strategy legacy projects.

DELIVERY ON TARGETS 2016-2017

- Over 90% of SDAAC membership invitations accepted.
- Terms of Reference created, and details of the new group uploaded on to dedicated Seafish SDAAC web page.
- Two SDAAC meetings held with widespread industry and Government engagement, plus two progress updates circulated to members.
- Delivery of works approved by the SDAAC, including:
 - Coordinating the UK's FAO Aquaculture Questionnaire 2017.
 - Supporting key external aquaculture initiatives, e.g., Seafood Strategy 2040, NEF Blue New Deal, BBSRC-NERC UK Aquaculture Initiative.
 - Attending/presenting at major industry events, e.g. AquacultureUK, European Aquaculture Conference, UK Aquaculture Forum, SAGB events.
 - Outreach to UK aquaculture training providers highlighting Seafish sea safety training to new industry entrants.
 - Updating and streamlining Seafish aquaculture web information resulting in page views increasing by 13.5% compared to 2015/16.

- Former English Aquaculture Working Group (EAWG) reformed as the SDAAC and previous EAWG members positively engaged.
- The two Defra requested/Seafish commissioned studies complete and on dedicated Seafish Aquaculture webpage.
 - Report 1 'Aquaculture Economics in England, Wales and NI'.
 - Report 2 'Several and Regulating Orders in relation to UK Shellfish Production'.
- In collaboration with Cefas, Phase 1 of the 'Aquaculture Regulatory Toolbox for England' uploaded on to a dedicated Seafish Aquaculture webpage.

DOMESTIC AQUACULTURE

**Case Study – Seafish submission of the UK's
FAO Aquaculture Questionnaire 2017**

"A big thanks to you and your colleagues for all your efforts to get [the questionnaire] into us so promptly - we are delighted to receive a comprehensive response on behalf of the UK! Best regards, on behalf of us all at FAO."

Malcolm Beveridge, Acting Branch Head, Aquaculture (FIAA), FAO, Rome

"Your co-ordination of the recent submission of UK responses (Scotland, NI, England and Wales) to the FAO's Code of Conduct for Responsible Fisheries (CCRF) Aquaculture Questionnaire 2017 is to be commended. This is a complex and time bound objective. The questionnaire is such a comprehensive document, and once published will be very useful to our aquaculture stakeholders."

Colette Connor, Aquaculture, Fish Health and FCILC, Marine and Fisheries Division, Environment, Marine and Fisheries Group, Department of Agriculture, Environment and Rural Affairs (DAERA), Northern Ireland

As aquaculture is a devolved responsibility across the UK the Domestic Aquaculture programme has worked closely with the Fisheries Administrations in England, Northern Ireland, Scotland and Wales to coordinate their responses to the latest United Nations Food and Agriculture Organisation (FAO) Aquaculture Questionnaire, and submitted the finalised questionnaire to the FAO on behalf of the UK.

In accordance with recommendations from the FAO Committee on Fisheries Sub-Committee on Aquaculture, this biennial questionnaire is to enable the FAO to compile a comprehensive set of data and carry out analysis of the global aquaculture performance in relation to the aquaculture provisions of the Code of Conduct for Responsible Fisheries - the aim of which is to facilitate positive change within fisheries and aquaculture in order to ensure that resources are utilized in a long-term sustainable manner.

The UK submission details the essential aquaculture management instruments and measures across the four Fisheries Administrations, as well as mechanisms that support or enhance them. By bringing together in one document how aquaculture is managed across the country it helps clarify the pertinence and effectiveness of current UK measures.

Seafish has the UK's 2017 FAO Aquaculture Questionnaire on its website after securing agreement from both the FAO and the four Fisheries Administrations that making this resource available to stakeholders would be a positive outcome and could assist the formulation of future policies and initiatives aimed at supporting the industry.



PROGRAMME

Bivalve Mollusc Shellfish Safety

Provide information and expertise to regulators and industry to reduce the risk of threats to human health related to bivalve consumption.

WORK PROGRAMME OVERALL KPI

Reduction in poisoning incidents relating to bivalve mollusc safety.

WORK PROGRAMME ANNUAL TARGET FOR 2016-17

Increase opening rates of monthly communications by 10%.

PROJECT

BIVALVE MOLLUSC SHELLFISH SAFETY (BMSS)

Horizon Scanning for developments in research and regulation in the field of 'threats to human health from the consumption of bivalves' from production to the final consumer. Disseminate this information to industry via weekly updates, website and social media.

Collaborate with competent authorities for food safety and UK/EU scientific bodies on norovirus research. Build and maintain key relationships to access information and to represent industry views on any impacts of proposals.

Inform stakeholders of progress via monthly updates. Draft specific guidance on regulatory compliance or best practice in the production of bivalves for human consumption.

MARINE LEGISLATION

- Horizon Scanning for developments in regulation with potential to impact on the seafood industry.
- EU / UK in origin. Disseminate this information to industry via monthly updates.
- Stakeholder Engagement. To build and maintain key relationships to access information and to represent industry views on any impacts of proposals.

DELIVERY ON TARGETS 2016-2017

Stakeholder Communication
Information received from official sources was cascaded to industry via monthly newsletters and social media.

Stakeholder collaboration
Convened industry WG to be active members of the FSA Shellfish Stakeholder Group to review classification and sampling system.

We were active members of the reduced depuration time Working Group to produce guidance for local regulators and industry.

Industry Guidance published on:

- 'Reducing the Depuration Time of Bivalve Molluscs'.
- Norovirus and bivalve molluscs.
- Changes to Classification, Category A change and EPT.
- Pre-requisites for Hazard Analysis and Critical Control Points.
- The emerging risk of tetrodotoxin (TTX).

Stakeholder Communication
We published monthly Marine Environment Legislation Updates.

We were actively involved in 14 consultations on implementation of marine environment regulation in all UK regions.

BIVALVE MOLLUSC SHELLFISH SAFETY

The opportunity for reduced depuration times for bivalve molluscs

For many years the UK has set 42 hours as the minimum legally required depuration time for all species of bivalve shellfish, regardless of whether the product placed on the market is intended to be eaten raw or cooked. Other European Union (EU) countries use differing depuration times, mostly less than 42 hours, while still fulfilling the end product standards required by EU food safety regulations.

Seafish has worked to prove that 42 hours is unnecessary and to get an agreement from the regulating authorities, The Food Standards Agency (FSA) for England and Food Standards Scotland (FSS) agreed, that as long as the end product standards are met in accordance with EU law then 42 hours may not be necessary. Reducing depuration time offers some advantages to a business; it will reduce operating costs and it offers the opportunity to increase throughput without incurring additional cost or requiring a larger footprint for the depuration plant.

Seafish worked with regulators and enforcement officers agree processes and procedures that would allow flexibility. Agreement was reached that food business operators (FBO) may obtain flexibility in the depuration time they use, but only if approval is given by an Authorising Officer (AO). This is usually an Environmental Health Officer (EHO) and will require additional testing of the system.

Once an 'in principle' agreement was reached Seafish reviewed the guidance for Local Authorities on the approval process for start-up depuration centres to reflect these changes. Guidance was also published on how a business could approach the subject of determining risk when they are considering applying for approval to reduce the depuration time.

Water Framework Directive and Marine Strategy Directive

We have been actively involved in the Commission groups on the Water Framework Directive and Marine Strategy Directive. We only have access to these groups because of our association with the Aquaculture Advisory Committee and the European Mollusc Producers Association. However, there is no other representation from our industries at these groups so it is vital that this is maintained. Fishing is something which is being targeted via this legislation and it is vital that the industry has a voice here. It has been possible to raise the profile of the industry and to get certain wording in guidance document changed to better protect the industry.



PROGRAMME

**Strategic
Investment
Programme**WORK PROGRAMME
OVERALL KPI

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

WORK PROGRAMME ANNUAL
TARGET FOR 2016-17

- Ensure that the commitments of all existing contractors are delivered.
- Disburse the funds available during 2016/17 against applications that meet the fund's criteria.
- Develop metrics to assess the ROI and value-added by contractors.
- Explore the performance of the fund relative to others in the sector.

PROJECT

**STRATEGIC INVESTMENT
PROGRAMME**

The Strategic Investment Programme will drive progress across all areas of the Corporate Plan by identifying, scoping and supporting external investment opportunities that will advance the achievement of our agreed goals.

The SIP will monitor the progress of contracts already awarded, continue to provide flexible investment in strategic research and development and develop metrics for assessing its effectiveness.

DELIVERY ON TARGETS 2016-2017

- The scheme has been established and advertised, high level of oversubscription demonstrates its recognition by the intended users.
- Good communications with all contractors has ensured that commitments are met and contract variations negotiated where appropriate.
- One non-compliant contractor had their contract terminated.
- Evaluation methods devised to determine the impacts and VFM for individual projects and the programme as a whole.
- Evaluation of the fund relative to others has been deferred to 2017/18.

STRATEGIC INVESTMENT PROGRAMME

Highlights

SIP contractors are starting to deliver exceptional results as their work is completed and the programme itself has operated very effectively with low overheads. Media coverage of the work has been gratifying and feedback from contractors has been extremely positive:

"In my opinion this is one of the easiest funding measures to access that I have been involved with. Previous fisheries funding such as FIFG has had a relatively low take-up due to the complexities, whether real or perceived, of accessing funding. This has not been the case with the Seafish SIP which I felt was designed to allow easy accessibility which will therefore open out the scheme for funding applications from industry as well as academic organisations etc."

"Strategically the SIP is excellent - it has provided us with huge strategic benefits and we hope the deliverables have met with the expectations of Seafish."

Net Positive Fishing brought 17 international experts together in May 2016 to try to reinvent commercial fishing with a special 'Disruptive Technology' workshop on seafood harvesting. This fascinating project was an initiative from Espersen, Icelandic Seachill and Nomad/Iglo. It brought together the worlds of high technology and seafood and raised radical and creative concepts for the long term future of the fishing industry. The focus was on ways of minimising energy use and environmental impact whilst maintaining the highest possible product quality.

Closing the Circle addressed three critical aquaculture issues simultaneously:

- The need for a generic shellfish hatchery design with associated spatting ponds in order to increase the supply of spat and juvenile bivalves.
- An aquaculture site scoping matrix for a rapid identification of the species potential of the habitats in any given site.
- The aquaculture opportunities presented by enclosed marine water bodies such as the proposed Swansea Bay tidal lagoon.

The result is effectively a template that can be applied to any aquaculture site in NW Europe and the means by which the current bottleneck in spat supply can be overcome.

North Sea Cod Certification has helped an industry consortium to commission an audit of that cod stock against the Marine Stewardship Council standard. As this Delivery Report goes to press news is breaking that shows the results of industry and science working closely together to deliver the recovery of this iconic stock.

"I thought it was easy to access. Personally I think this sort of scheme is essential for Seafish as you can never foresee in a corporate plan what all the future needs for innovation might be. The SIP gives Seafish the flexibility to invest in potential ideas that could make a step change to performance."

"I feel it is a highly valuable part of the current plan and should be extended / expanded."





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 2016-17

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

PROJECT

HORIZON RISK MAPPING

Agree priorities for in-depth research with panels and board.

HORIZON RISK SWEEPING

Populate the risk landscape using a very broad stakeholder community.

DEEP REVIEWS ON PRIORITY ISSUES

Complete in-depth analysis and report production priority issues.

DELIVERY ON TARGETS 2016-2017

Seafood horizons summary 2015 (risk maps and deep reviews) sent to 800 stakeholders.

Communication by email allowed the HSLT steering group to shape the 2016 work appropriately and provide recommendations to the Seafish Board. One meeting of the group was held to review the outputs in advance of the panel meetings, review progress of work underway and overall direction.

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 2016 requiring in-depth review and analysis were prioritised by the steering group and reported to the Seafish Board.

Key industry stakeholders engaged, including Seafish panels and regional stakeholders in Wales, South West England, and Northern Ireland. Additional input from Seafish fleet and processing surveys and Seafish staff.

Four priority risk reviews in 2015 [focussed on export trades, product integrity, fish as food (UK consumption), and the next NGO issue] were published on the Seafish website (Horizons web page).

Two reviews were undertaken focussing on priority issues in 2016: Brexit and the UK seafood industry, and seafood supplies in 15 years. The Brexit review was delivered in draft to Seafish Board, UK Government and devolved administrations for consideration.

A watching brief was also produced for climate change adaptation in UK wild capture seafood in 2016/17.

HORIZON SCANNING & LONG TERM ISSUES

Horizon Scanning 2016/17

"Horizon Scanning is more than useful, I find it quite stimulating. It is good to listen to other industry leaders with their perspective of the future for their area of expertise and how we all blend that together."

Martyn Boyers, Chief Executive, Port of Grimsby / East Grimsby Fish Dock Enterprises

Over the course of 2016, the seafood horizon was swept to identify existing and emerging risks to industry. This began with the Horizon Scanning risk maps from 2015, containing over 190 identified risk items. These maps were reviewed internally and externally. Internally, Seafish staff reviewed all maps (April 2016 – March 2017). Externally, stakeholder input was obtained from Seafish regional committees in Wales, South West England and Northern Ireland), from Seafish fleet and processing surveys, and from all three Seafish panels (March 2017).

Stakeholders were asked to input into this horizon scanning by providing updates 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 concluded by mapping the risk landscape with over 262 risk items.

Risks maps were re-organised and re-grouped. An additional 'macro conditions' risk map was introduced as a prelude to the six risk maps that capture more seafood specific 'risk families' (see Figure 1). Some of these seafood specific 'risk families' were reframed; as 'industry systems and operations' and 'labour and skills'. 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 can assess likelihood (the first question), industry is 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.







Contact us

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

Contact us through the following channels:

Seafish

18 Logie Mill, Logie Green Road, Edinburgh EH7 4HS
Tel: +44 (0)131 558 3331 Fax: +44 (0)131 558 1442

Origin Way, Europarc, Grimsby DN37 9TZ
Tel: +44 (0)1472 252 300 Fax: +44 (0)1472 268 792

Email: seafish@seafish.co.uk

Web: www.seafish.org | www.fishisthedish.co.uk

Twitter: [@seafishuk](https://twitter.com/seafishuk) | [@fishisthedish](https://twitter.com/fishisthedish)