

seafish

Annual Plan

2023-2024





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Our purpose and operating context

We know what seafood can do for the nation. It's packed full of nutrition; when managed responsibly, it's sustainable; it creates long-term job opportunities; it's a low-carbon food with a significant role to play in future food security; it builds and sustains our communities; and it drives business.

We also know that the seafood sector continues to navigate a challenging operating environment: from increased operating costs due to the energy crisis, reduced consumer spending and labour shortages to geopolitical instability and a global climate and biodiversity emergency. The cumulative impact of these challenges is unprecedented and will be felt across all parts of the supply chain.

We believe seafood is the way forward and when this sector thrives, the whole nation thrives. That's why we're going to do everything we can to support it – just as we have done for over 40 years. We will deliver the advice, guidance and evidence that businesses and government need to make decisions, and we will convene the forums that facilitate information-sharing and enable collaboration.

This Annual Plan for 2023-2024 is the first in our new five-year Corporate Plan and describes how we will deliver on the priorities that the seafood industry has set for us.

It details the support we will provide to help seafood businesses across the UK to tackle the challenges, and to make the most of the opportunities, that we will encounter over the next 12 months.

How we will work

We are the only organisation that works across the UK and across the seafood supply chain. We are there to support every part of the seafood sector: from small single-operator skippers in the Northwest of Scotland, to the large pelagic fishing fleet in the Northeast, to shellfish processors in Northern Ireland, to mussel producers in Wales, to global seafood processing companies in the East of England, and to all the restaurants and retailers on every high street from Ballycastle to Brighton.

We strive to be the organisation that:

- Has the expertise to help solve the problems that prevent the seafood sector from thriving;
- Connects the right people to work together to find solutions to the big industry issues;
- Advises on the things that matter most to industry and to government;
- Puts its people at the heart of the seafood industry, working with smart and passionate colleagues and stakeholders to solve challenging, complex and important issues, and to successfully deliver on outcomes with impact for the benefit of the entire UK seafood sector.

We know that we can't drive the transformation to a thriving seafood industry on our own, and working collaboratively with industry, government and the research community will be at the heart of everything we do.

Key to this partnership approach will be:

- Our industry **Panels**, who bring expertise from across the UK supply chain and provide a constant and clear line of sight to our Board on the landscape within which our industry operate;
- Our **Advisory Committees**, which create space for stakeholders around the UK to ensure we are aware of local issues;
- Our **Issues Groups**, which provide a forum for important UK-wide issues to be discussed, common understanding achieved and actions defined;
- The regular industry forums, advisory groups and project teams that we convene to support the work that we deliver.

As important as producing the advice, guidance and services that we deliver is ensuring that they are communicated and shared in accessible, engaging and innovative ways. Guided by our Stakeholder Engagement Strategy, we will do this by:

- Making sure we know and understand our audiences so that we get the right information to the right people in a timely manner;
- Measuring our success, understanding our impact and continually working to refine and enhance our offering to stakeholders;
- Continuing to scan, listen and react to new opportunities and challenges as the landscape changes.

We also know that to succeed we will need to be agile so we can quickly flex and adapt. We will also need to establish high-quality information networks (via our engagement forums, existing stakeholder relationships and our Issues Groups) to stay alert so we can quickly get on the front foot when new challenges emerge.



Our priorities

There are no easy solutions to the challenges ahead, but we are committed to supporting the UK seafood industry to survive and thrive. To realise our ambition we know that the seafood sector will need:

- A global reputation for excellence;
- A resilient, well-managed supply chain;
- To be futureproofed and ready to meet the challenges and seize the opportunities ahead.

Collectively, our seven industry priorities will ensure we help position the seafood sector to succeed.

Ensuring a safe and skilled workforce:

Facilitating and promoting international trade:

Responding to the climate change emergency:

Improving fisheries management:

Enabling supply chain resilience:

Improving data, insight and innovation:

Championing industry reputation:



Ensuring a safe and skilled workforce:

We want the UK seafood sector to be recognised as a dynamic, safe and attractive sector to work in, and for individual businesses to have the systems and processes in place to source the labour they need and to provide safe workplaces for all.

Our support in this area ranges from signposting training opportunities and delivering on-the-ground safety initiatives to working on ethical issues in global supply and ensuring the information on labour issues across the sector is accurate and up to date. We want to work with the seafood sector to:

- Help seafood businesses overcome labour and skills shortages;
- Eradicate welfare and human rights concerns in the seafood supply chain;
- Eliminate preventable work-related fatalities and injuries in the seafood industry.

Our focus during 2023-2024 is to:

1. Support businesses to understand and improve worker welfare, human rights and social responsibility obligations across the seafood supply chain.
2. Deliver our Kingfisher 'at sea' safety and hazard reporting programmes, including the Kingfisher Bulletin, FishSAFE and KIS-ORCA.
3. Drive improvements in fishing safety, including delivering the Fishing Industry Safety Group (FISG) Home and Dry safety campaign, and supporting national and regional fishing safety forums.
4. Continue to lead the development and delivery of training and certification for workers in the seafood industry by developing solutions for identified skills gaps and training needs, and administering funding to improve skills levels across the supply chain.
5. Research and report on labour issues at national and regional level to support industry to clearly articulate labour issues, and to inform government policy.

Facilitating and promoting international trade:

Seafood is recognised as one of the most globally traded food commodities. This is clearly reflected in the UK seafood sector where most of what we catch and land domestically is exported, while we import more than 70% of the seafood we eat, both farmed and wild-capture.

The viability of the UK seafood sector is dependent on the international trading environment, and global events determine the seafood on our plates. The importance of understanding this international environment, thereby empowering businesses to achieve frictionless seafood trade with suppliers and markets across the world, cannot be overstated.

Our focus during 2023-2024 is to:

1. Provide timely and relevant advice and guidance on the domestic legislation changes that could impact how UK businesses trade domestically or internationally, e.g. the Extended Producer Responsibility Tax, and the requirements for 'supply chain traceability' such as the need to align documentation and record-keeping.
2. Monitor regulatory changes in key markets, work with government to ensure additional burdens are minimised and ensure businesses have the information they need to adapt e.g. new maximum limits for chemical or biological contaminants, and the EU plastic packaging.
3. Continue to facilitate seafood imports and exports with particular focus on Free Trade Agreements, and help businesses to take advantage of new simplified trade procedures.
4. Provide regular and bespoke trade analysis and insight reports to monitor trends in seafood trade, and to assess likely impacts of emerging national, international and global events on trade opportunities.
5. Support the UK seafood business to showcase their products and establish new markets via our seafood trade pavilions at three international trade shows (including Barcelona and Boston) and deliver three in-market events to promote UK seafood in the USA and Asia.

Responding to the climate change emergency:

Climate change remains the most significant challenge of our time. It presents a significant threat to the seafood industry – from what we catch and how and where we catch it, to how we process it and where we sell and trade our seafood. We also know that the seafood sector contributes to climate change and is affected by it. There is no easy solution here, but our priority is to support the seafood sector to achieve its emissions targets, and to ensure businesses understand how they will need to adapt to the impacts of a changing climate on their daily operations.

Our focus during 2023-2024 is to:

1. Deliver the Seafood Emissions Profiling Tool for wild-capture and farmed seafood products, and to help seafood businesses use this resource to drive improvements to deliver on their contribution to the UK's Net Zero target.
2. Facilitate the Vessels of the Future Forum, and its associated workstreams, to support the catching sector (and aquaculture service vessels), research community, boat builders, engine manufacturers and regulators to collaboratively transition the UK fishing fleet to Net Zero.
3. Use our Issues Groups network to share information, promote ideas and facilitate discussion on climate change mitigation and adaption topics relevant to the seafood supply chain.
4. Provide analysis and advice on fuel consumption across the supply chain, and benchmark business performance to highlight opportunities to reduce use.
5. Recognising how fishing gear advancements can help reduce carbon emissions, we will facilitate the UK Gear Forum which brings together industry, research communities and governments to advance sustainability in all capture fisheries through the lens of gear technology innovations.

Improving fisheries management:

Achieving sustainable fisheries management is complex. It requires a combination of science and evidence, appropriate rules and regulations, an effective system to monitor and control behaviour and good decision making. It also needs the active engagement of coastal communities, clear linkages to the wider supply chain and, fundamentally, the support of the wider public. There are many parties that have a role to play in delivering the national ambition of a world-class fisheries management system in the UK. Our contribution will be to use our knowledge and skills in science and fisheries management, and our capability in convening and facilitating, to help reach this ambition.

Our focus during 2023-2024 is to:

1. Facilitate the Shellfish Industry Advisory Group (SIAG) and Finfish Industry Advisory Group (FIAG) and associated subgroups as the primary forum for industry, researchers and government to work collaboratively on improving fisheries management outcomes.
2. Support the UK Fisheries Management Plan (FMP) programme, including facilitating the development and implementation of the crab/lobster and whelk FMPs and providing economic evidence and advice to enable effective monitoring of individual FMPs.
3. Progress the Ecological Risk Assessment, via a pilot in the Southwest, as a model to improve fisheries management and to provide for supply chain assurance for data-limited fisheries.
4. Provide advice, guidance and training to the catching sector and government on gear technology, and on the opportunities to use selectivity innovations, to improve efficiency and help address the associated impacts of fishing on the marine environment.
5. Provide independent analysis and assessment on fishery-specific issues to inform processor and retailer purchasing decisions.

Enabling supply chain resilience:

The seafood industry is not unique in finding itself operating in an environment of persistent unpredictability. The issues it faces are often complex, difficult to forecast and to assess their impact, and they can create challenging trading environments. They are not always problematic; change can also bring opportunities. The certainty is that change is constant and that seafood businesses, regardless of size, need to be able to respond and adapt.

Our focus during 2023-2024 is to:

1. Bring together policy makers, regulators, researchers and industry to work collaboratively to find solutions to the issues affecting shellfish aquaculture, and to co-ordinate projects to provide robust evidence to support proposals for regulatory change.
2. Monitor emerging issues, and provide analysis and assessments to help businesses make sense of these issues and decide what action should be taken, and where Seafish can support.
3. Work collaboratively with the shellfish sector to deliver codes of practice to help protect the welfare of shellfish (crabs, lobsters and Nephrops) across the supply chain.
4. Facilitate cross supply chain initiatives to find solutions to complex supply chain problems. Examples include NAPA, increased opportunities for domestic landings and food security.
5. Produce our quarterly seafood supply chain analysis to provide the evidence and a record of the changes the sector is facing.

Improving data, insight and innovation:

We have a long record of collecting data and providing research and analysis to support the sector; analysis on how it trades, its economic performance and how its customers behave. In a fragmented industry, where businesses can range from single-vessel operators through to multinational food companies, we consistently produce quality analysis and insights into the operation of the seafood sector at both the macro and micro levels.

Our focus during 2023-2024 is to:

1. Maintain and update our existing data sets (for the processing and catching sectors) and embark on establishing similar data sets for the aquaculture and fish-and-chip sectors.
2. Deliver generic and bespoke market insight analysis on consumer trends in retail and foodservice.
3. Produce analyses and advice on relevant issues affecting the seafood supply chain such as fuel usage, labour challenges, food security and emerging global events.
4. Continue to build our network of research partnerships with institutes across the UK, to collaborate on projects to find solutions to the issues facing the seafood sector and to drive innovation.
5. Use our spatial analysis expertise to support decision making, including developing an interactive online mapping interface to assist the fishing industry to display their fishing data and assist with 'competition for space' discussions.

Championing industry reputation:

Our ambition is to enable and empower the seafood industry to respond to the reputational and societal issues that can act as a barrier to consumers choosing seafood. We will do this by scaling up existing efforts and embracing new ones to manage risks and support a thriving sector, now and in the future.

Our focus during 2023-2024 is to:

1. Scan the environment for reputational risks to proactively plan responses and manage reactive reputational challenges when they arise.
2. Use our knowledge and expertise of the seafood supply chain to counter misinformation about the industry and about seafood as a nutritious food product.
3. Develop and test key messages, position statements and campaigns on reputation issues to build a clear narrative about the UK seafood industry that will improve perceptions.
4. Continue to facilitate the Seafood Issues Groups as a collaborative forum for the seafood supply chain, to engage on reputational issues relating to responsible sourcing, sustainable production and supply chain integrity.

Optimising our comms and engagement

Our communication and engagement support ensures that the advice, guidance and products we produce land with measurable impact.

Our focus during 2023-2024 is to:

1. Liaise with colleagues and stakeholders to provide cross-channel external comms support to ensure our advice and guidance is reaching the audiences it needs to reach.
2. Develop a stakeholder sentiment tracking platform to monitor, measure and optimise our engagement with our audiences.



Our enabling services

We know that we can only deliver externally if we have the right people, systems and processes in place internally. Our reputation depends on what we deliver, but we need to have our core internal services lined up to do this properly. Our HR, Finance and IT services provide the solid foundation for our work.

Our focus during 2023-2024 is to:

1. Deliver the highest standards of governance in terms of managing our budget and safeguarding our assets.
2. Successfully review the Seafish Levy to deliver a fair and equitable levy model that minimises the burden to business but provides a sustainable funding base to enable Seafish to deliver the services that the seafood industry demands.
3. Create a workplace culture that ensures Seafish attracts and retains the talent it needs to provide the right support and expertise to the UK seafood industry.
4. Proactively support and contribute to the delivery of the Greening Government Commitments and Defra Group Sustainability Strategy, to reduce our environmental impacts and improve the sustainability credentials of our sites, services and operations.
5. Ensure we have the right technology and systems so that we can work effectively, produce quality outputs and engage collaboratively, wherever we are in the UK.

Measuring our performance

Seafish delivers advice, guidance and support to businesses across the seafood supply chain, and to government. This work is often responsive, and we know that both industry and government value our agility and our ability to pivot to respond to local, national and global issues. This means that not everything we do can be easily measured. But how we work and the tangible outputs we produce are the building blocks – our engagement forums, our newsletters, relevant accessible advice – that enable us to be effective and to ultimately deliver on our ambition for a thriving seafood industry.

Our contributing indicators, alongside our stakeholder sentiment tracking, will be used to assess how effectively we have delivered against our priorities over the next 12 months.



Contributing indicators

Ensuring a safe and skilled workforce:

1. Deliver 6,000 training places onshore and at sea.
2. Complete 10 audits of Seafish Approved Training Providers.
3. Deliver a 70% increase in personal alerts to Kingfisher Bulletin users and achieve 30% of new users creating personal alert areas.
4. Drive real behavioural change through the Home and Dry initiative, with 70% of those who engage with the campaign taking an additional safety action.

Facilitating and promoting international trade:

1. Support industry participation at three overseas meet-the-buyer events or missions.
2. Deliver UK seafood pavilions at three international trade shows, with a 100% increase in industry participation on the previous year.
3. Respond to 15 bespoke trade requests per month.
4. Produce eight new (or significant updates to) regulatory guidance notes.
5. Produce quarterly trade reports which will profile key information on UK imports/exports and the global trading environment.
6. Facilitate eight import/export forums, with a minimum attendance rate of 20 per forum meeting.

Responding to the climate change emergency:

1. Deliver the Seafood Emissions Profile Tool.
2. Produce quarterly climate change newsletters.
3. Facilitate quarterly meetings of the Vessels of the Future Forum.

Improving fisheries management:

1. Convene four meetings each of FIAG and SIAG, and their associated groups.
2. Secure approval of the crab and lobster, whelk and scallop FMPs for implementation.

Enabling supply chain resilience:

1. Produce a series of codes of practice on crustacea welfare for the shellfish supply chain.
2. Produce quarterly supply chain review reports detailing how the seafood supply chain in the UK is performing.
3. Convene three Shellfish Stakeholder Working Group meetings and four subgroup meetings focused on shellfish water quality issue management.

Improving data, insight and innovation:

1. Deliver the fleet and processing sector data collection surveys, with a response rate that ensures at least 10% of the population is surveyed.
2. Partner with universities/research institutes on three successful UKRI (or similar) funding bids.
3. Produce 35 new factsheets on seafood trends in retail and foodservice.
4. Deliver five bespoke analysis and advice reports.

Championing industry reputation:

1. Deliver one impactful, evidence-based positive industry reputation campaign based on insight from our reputation monitoring.
2. Increase in positive media sentiment about the seafood industry by year end (benchmark to be established in quarter 1).
3. Deliver eight online bite-size Issues Groups and four in-person Issues Groups – with at least 50 attendees at each meeting.

Comms and engagement:

1. Deliver 10 Advisory Committee meetings throughout the year with a minimum of seven industry committee members attending each meeting.
2. Benchmark and monitor stakeholder sentiment towards Seafish and the work we do.
3. Monitor engagement with our communications content and channels (with all KPIs set at levels that exceed average engagement with government comms) as follows:
 - a. Increase our website customer satisfaction score to 60% throughout the year.
 - b. A 4% rate of engagement across our social platforms throughout the year.

Enabling services:

1. Achieve a figure of 2% or less bad debt as a proportion of overall levy submissions.
2. Deliver Cyber Essentials Certification by year-end to ensure our cybersecurity credentials are optimised and fully aligned to the Defra cybersecurity framework.
3. Capture data on the diversity of our staff population with a minimum 50% response rate, coupled with a 10% staff uptake in membership of a Diversity and Inclusion focus group.



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