



**seafish**

Here to give the UK seafood sector  
the support it needs to thrive.

# Annual Plan 2020/2021



Planning for the Seafish Annual Plan for 2020/21, the third in our Corporate Plan cycle, commenced in December 2019; at that time the world looked very different.



Our approach had been to continue to structure and deliver our annual work programme through our five key challenges, supported by our **Enabling Services** (HR, Finance and IT). The Annual Plan would be built around a theme of 'Consolidation' as we looked to complete and build upon projects started during years 1 and 2 of our Corporate Plan cycle.

**Challenge 1:** A changing political, economic and regulatory landscape.

**Challenge 2:** Stagnant consumer demand and strong competition from other protein foods.

**Challenge 3:** Competing with other food production sectors for access to a suitably skilled workforce, while addressing issues around workplace safety.

**Challenge 4:** Sourcing sustainable seafood in an increasingly competitive global market, alongside continued public concern over practices that compromise human welfare and the environment.

**Challenge 5:** Accessing the data, information and knowledge that will ensure the sector is equipped to understand and respond innovatively to a changing environment.

We knew that the opportunities and challenges associated with EU Exit would continue to be of critical importance for the seafood industry (**Challenge 1**), as would the ongoing drive to get consumers to eat at least the Public Health England recommended intake of two portions of seafood per week (**Challenge 2**).

Prior to the Annual Plan being finalised for approval, the world changed dramatically, with the declaration of the Covid-19 pandemic. The implications of this event on our public health and on our economic resilience are unprecedented.

It is also clear that the pandemic has had a catastrophic impact on large parts of the seafood industry as traditional routes to market for much of the UK-landed seafood have collapsed, and the fragmentation and fragility of the seafood supply chain is exposed.

In light of this, we have taken the decision to revisit our approach to how we will support the seafood industry during this period of change. Key to this will be:

- A priority focus on assisting industry to respond to Covid-19 and continuing to prepare for our exit from the EU. At the same time we need to ensure there is sufficient resource and budget flexibility in place to respond to industry needs as the impact of the pandemic continues to play out.
- Adjusting how we deliver our core services (such as industry training, our issues groups and our economic survey work) so that they remain relevant and viable.



We also plan to launch and implement our new Love Seafood initiative during this period, although the exact timeframes have still to be confirmed.

We will continue our theme of consolidation. Many of the activities listed in the plan reflect work that we have already started and which we will look to finish, although timeframes may shift as we reprioritise resources to respond to industry requests for assistance.

Our five challenge framework remains and our **Challenge 1** work programme has been repurposed to reflect our priority focus on Covid-19 support alongside our existing work to assist industry to adapt to EU Exit.

However, we recognise that this Annual Plan reflects a 'point in time' assessment of how we should prioritise resources and direct our efforts. In reality there is much uncertainty ahead and we fully expect that it will need to flex and adjust in response and that delivery timeframes may need to be revisited. For that reason the Annual Plan will be reviewed regularly during the year and revised when necessary.

## Part A: Planning and delivering in a time of change

There are two major events that are impacting and will continue to have an impact on the seafood industry during 2020/2021; Covid-19 and EU Exit. These have already shaped our work programme, and their impact will be felt for many years to come.

### Covid-19 pandemic and the UK seafood sector

UK landed seafood is typically distributed through three channels: exported mainly to European consumers, sold via the domestic food service sector (restaurants, bars, school canteens and some fish & chip shops) or sold through retail (predominately to small scale operators such as high-street fishmongers, with a limited amount into multiple retailer's fresh fish counters). The Covid-19 pandemic has significantly impacted on each of these supply routes.

At the time of writing trade into high-value European export markets has declined dramatically and the UK food service sector is closed. The retail sector is also not immune as:

- Large multiple retailers, in response to changing purchasing habits, have shut fish counters and limited the range of seafood products on offer to try and focus resources and supply chain logistics on keeping shelves stocked;
- High street fishmongers have faced difficulties in securing supplies as fishing vessels tie up and processing businesses close their doors because of uncertain trading conditions.

However, there remains a strong demand for seafood in the UK. Large UK retailers experienced a growth of 60% in sales during the first few weeks of the national lockdown, mainly across frozen (fish fingers) and ambient product ranges (canned tuna). The bulk of these sales have been driven by imported product and the sophisticated nature of retailer supply chains mean it is not possible to easily switch product lines to UK-landed fish.

This has created a challenge where the domestic seafood industry (from the catching sector through to the food service sector) must find domestic customers to replace lost export trade, and establish new routes to existing customers who are eating at home, rather than at restaurants.

There is an opportunity to establish networks to provide seafood to consumers via local fishmongers or through direct sales (fish boxes to the door). This is a very different business model and is not one that small scale operators can easily adapt to; in many cases the basic infrastructure (transport routes, processing capability and digital sales platforms) is not well established or just not available. Similarly there is an opportunity to think differently about retail supply chains and to build more resilient domestic supply networks. We also know that the crises will pass and seafood businesses will need to be agile so that they can quickly respond once export markets reopen.



We have adopted a three phased approach to how we will support the seafood industry to remain viable during the Covid-19 pandemic:

**Phase 1 Response:** Working with the seafood industry to keep the fabric of the UK seafood supply chain intact.

**Phase 2 Recovery:** Assisting the seafood sector to get back on its feet as lockdown restrictions are eased and export markets reopen.

**Phase 3 Reset:** Understanding and responding to the long-term strategic implications that the pandemic has had on the seafood supply chain.

### **EU Exit**

At Seafish, we remain focused on helping our seafood sector navigate the opportunities and challenges that our exit from the EU will bring. This will include supporting industry to prepare for the 31 December 2020 transition period deadline by providing relevant and accessible regulatory advice and guidance, and economic analysis. As we transition out of the EU, we will also increase our efforts to support the vital role that international trade plays in the UK seafood supply chain by ensuring trade routes remain viable with both EU and global markets. Throughout we will continue to work in close collaboration with our four government partners.



## Part B: How we will work

Since the start of the current Corporate Plan cycle, we have committed to be flexible and agile so that we can quickly respond to emerging issues. This will be required more than ever during 2020/21 as will our commitment to working together with our industry partners to assist businesses to respond to and recover from the numerous challenges that the UK economy faces.

Integral to this is:

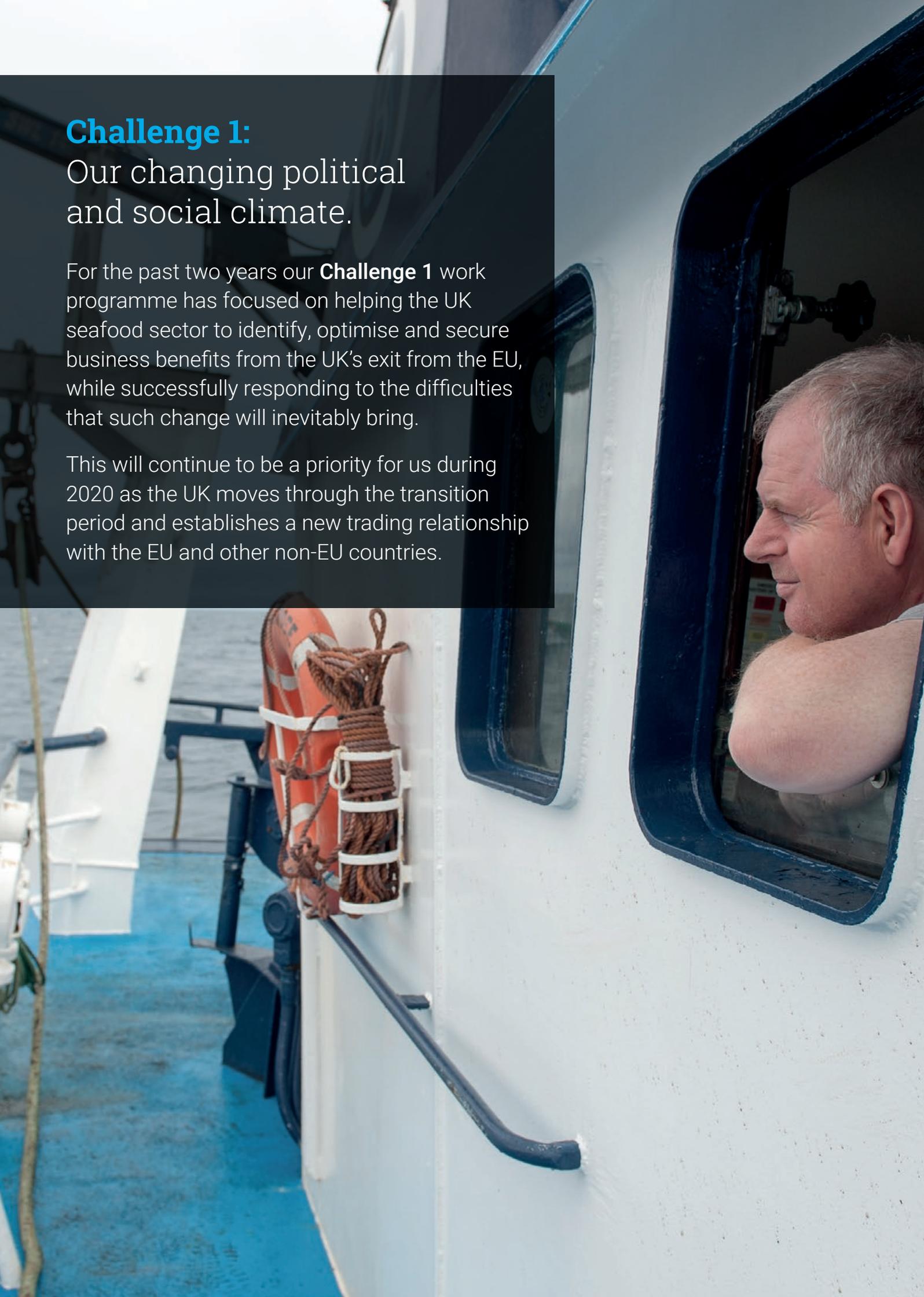
- The 'on the ground' engagement we provide through our national and regional committees, and the opportunity these forums provide to help us and government understand the impact that Covid-19 is having on seafood businesses across the UK.
- The work to promote the positive reputation and credibility of the industry, which is even more important in the current climate as we use the full suite of communication channels (print, broadcast and social media) to promote and increase consumer awareness of the benefits of a seafood-rich diet.
- The work we do to convene and facilitate forums to enable industry, government, the research community and non-governmental organisations (NGOs) to share information, ideas and solutions.
- Our active participation in stakeholder events in the UK and overseas to share best practice and identify opportunities for the UK industry.

## Challenge 1:

Our changing political and social climate.

For the past two years our **Challenge 1** work programme has focused on helping the UK seafood sector to identify, optimise and secure business benefits from the UK's exit from the EU, while successfully responding to the difficulties that such change will inevitably bring.

This will continue to be a priority for us during 2020 as the UK moves through the transition period and establishes a new trading relationship with the EU and other non-EU countries.



However, over the past few months the Covid-19 pandemic has had a catastrophic impact and unforeseen consequences for the seafood sector.

**Challenge 1** has become the central point of coordination for much of our work programme to assist businesses across the seafood supply chain to respond to, and in time recover from, the pandemic.

This will continue over the next twelve months. As expected the pandemic has also influenced the type of activities that we can deliver during this period as major international trade shows are cancelled. In response we will explore alternative ways to support seafood businesses to promote their products in overseas markets.

**Our proposed work programme to support Challenge 1 during 2020/2021 will include the following activities:**

- A.** Working in collaboration with industry and central government, via our Exporters Forum, to ensure that the opportunities and potential implications for seafood exports from EU Exit and potential future free trade agreement negotiations are understood and addressed.
- B.** Assisting industry, in Northern Ireland and across the wider UK, to understand and respond to the changes and challenges that the implementation of the Northern Ireland Protocol is likely to bring to seafood trade.
- C.** Work in collaboration with industry and central government to ensure that any new EU exit related regulations meet the needs of industry and where possible simultaneously meet the needs of our main trading partners without placing unnecessary burden on industry.
- D.** Develop tools and guidance to support businesses to respond to and recover from the Covid-19 pandemic including assisting seafood businesses to directly target domestic consumers.
- E.** Develop and implement targeted trade promotion activity in international markets to enable the seafood sector to revive their export business in the wake of Covid-19.
- F.** Conduct a 'task and finish' strategic review of the impact of Covid-19 on the UK seafood supply chain to inform decision making, government policy and future research needs. The review will use industry knowledge and experience to understand how and why the supply chain was impacted and what changes need to be made to improve future resilience.
- G.** Use the Seafish fleet and processing sector surveys to provide an evidenced-based assessment of:
  - The impact of Covid-19 on business viability; and
  - The contribution that government support measures have made in enabling businesses to withstand the crisis.

## Challenge 2:

Stagnant consumer demand and strong competition from other protein foods.

Our long-term ambition is to support the doubling of seafood consumption in the UK to two portions per person a week, which will in turn contribute to significant financial, social and health benefits for the nation.



At Seafish, we will approach this by positively influencing consumer attitudes and perceptions, encouraging people to place a higher value on seafood as a core part of their diet. Our recent strategic shift in approach to reversing a decline in seafood consumption recognises the long, but important journey ahead (20+ years).

Our focus is to work with UK seafood businesses to engage consumers to eat more seafood more often. The Covid-19 pandemic and the ongoing need for social distancing has meant that many of the iconic events that we usually hold annually to encourage Business2Business and Business2Consumer engagement have been cancelled for 2020/2021 (e.g. National Fish & Chip Awards and Seafood Restaurant of the Year). Despite this interruption, we will continue to innovate to find new ways to collaborate with supply chains to positively influence consumer attitudes and perceptions of seafood.

Our proposed work programme to support **Challenge 2** during 2020/2021 is centred round the development, launch and implementation of the new Love Seafood brand platform. The exact timeframes for the launch have still to be finalised but will be agreed in collaboration with the Love Seafood Group (LSG) and Seafish's Supply Chain and Consumer Panel once conditions are right.

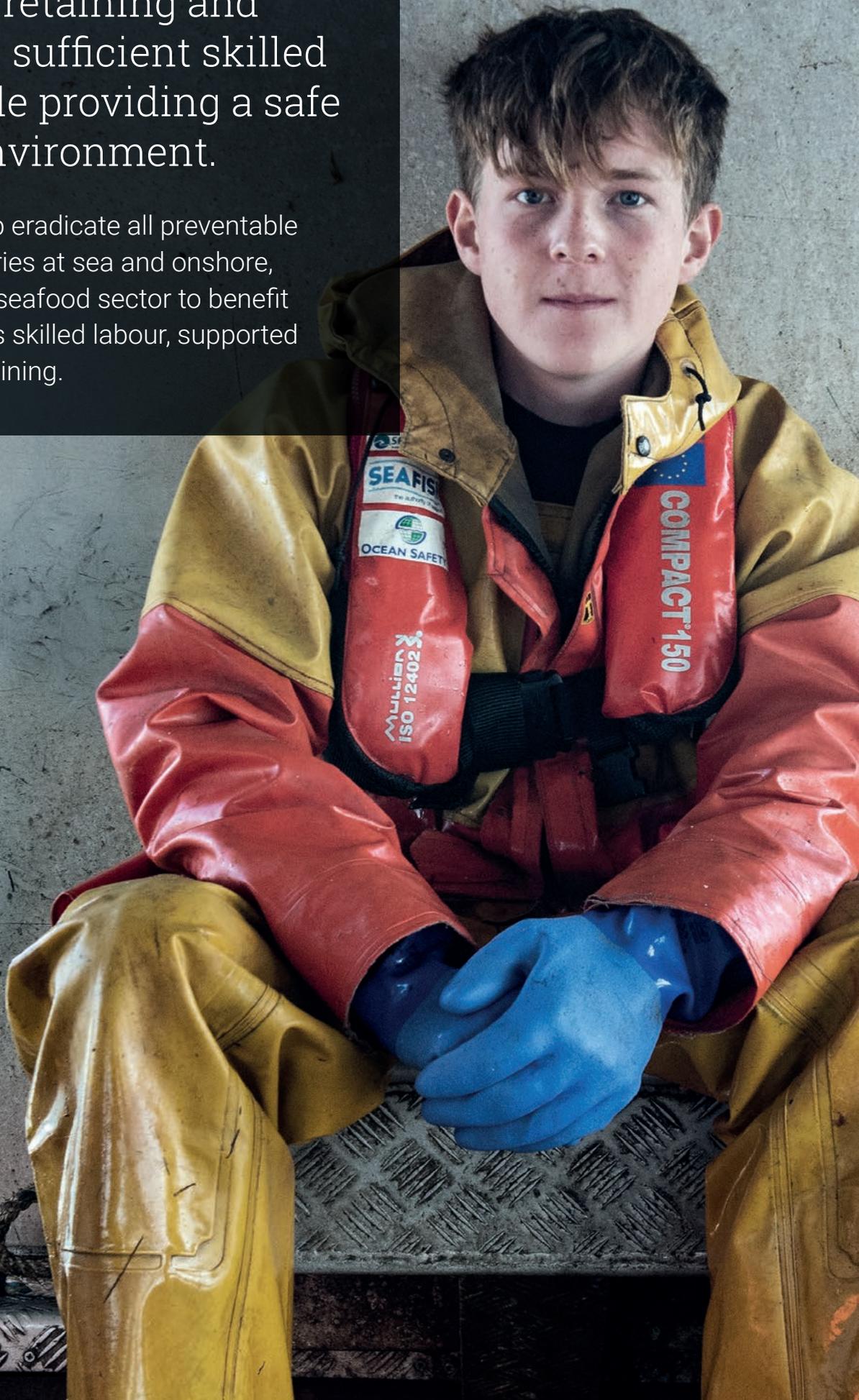
### The work programme will include the following activities:

- A. Convene and support the LSG so industry members can help shape the ongoing direction of the Love Seafood initiative and to establish a programme of consumer and trade campaigns, events and other activities throughout the year.
- B. Launch and promote Love Seafood direct to consumers so as to positively influence audience attitudes and perceptions towards the consumption of all seafood. Activities will include consumer campaigns and events across a wide range of channels and platforms.
- C. Promote Love Seafood direct to seafood businesses throughout the supply chain and across the UK, so they can participate in the initiative, use campaign assets and amplify messages. Activities may include trade-focused campaigns and events where possible.
- D. Produce market insight reports (and bespoke analysis on request) covering retail sales and foodservice channels, to enable businesses to take advantage of the Love Seafood brand activity, and to anticipate and respond to consumer trends.
- E. Provide seafood-specific regulatory guidance on health and nutrition claims and food advertising, to support Love Seafood activity and to assist industry compliance.

### Challenge 3:

Attracting, retaining and developing sufficient skilled labour while providing a safe working environment.

Our goal is to help eradicate all preventable fatalities and injuries at sea and onshore, and to assist the seafood sector to benefit from best-in-class skilled labour, supported by high quality training.



Ongoing social distancing restrictions in response to Covid-19 mean that we will need to think differently about how best to deliver our safety and training programme during 2020/21. Key to this will be enhancing our existing online training offering and exploring new ways to allow for remote learning and assessment so that the workforce across the seafood supply chain remains safe and skilled.

**Our proposed programme of work for 2020/2021 to support Challenge 3 will include the following activities:**

- A.** Continue to support the development and delivery of apprenticeship and other new entrant training programmes across the UK.
- B.** Continue to support the promotion of career and employment opportunities in the seafood industry by:
  - Developing promotional material that seafood businesses can use for their own recruitment activities;
  - Working in partnership with the seafood industry and other closely aligned industries to amplify relevant career campaigns and recruitment drives. For example, the Maritime Skills Alliance and Scotland Food and Drink; and
  - Improving the brand image of the sector so that potential employees see it as dynamic, future-focused and an attractive sector to be part of.
- C.** Continue to support the development of the Seafish Young Seafood Leaders Network to assist the seafood industry to identify, nurture and retain talent to support the next generation of young seafood executives to innovate and lead change in the industry.
- D.** Working collaboratively with the Maritime & Coastguard Agency (MCA) to ensure a smooth transition in the handover of responsibility for the delivery of Marine Survey services back to the MCA on 20 July 2020.
- E.** Deliver a range of Kingfisher services to improve fishing safety, understanding and prevent accidents, including:
  - Spatial data and guidance material (e.g. FishSAFE & KIS-ORCA) displaying hazards at sea from the offshore oil and gas, subsea cable and renewable energy sectors.
  - A hazard alert system (e.g. Kingfisher Bulletin), delivering real time safety messages of new hazards, conflicting activities and critical offshore news.
  - Information to improve understanding of the risks presented by offshore structures and safety protocols to follow.



- F.** Continue to progress the fishing industry safety agenda across the UK:
- Take a lead role in the Fishing Industry Safety Group (FISG) to deliver improvements in fishing safety across the UK catching sector.
  - Co-ordinate delivery of the FISG's Home and Dry safety campaign.
  - Facilitate/support national and regional fishing safety forums, ensuring effective alignment with FISG objectives.
  - Continue to administer MCA/ Trinity House funding for safety equipment and 'man overboard' awareness events.
- G.** Continue to collaborate with the MCA, the fishing industry and other stakeholders on preparations for the implementation of new UK regulations being developed on fishermen's training and certification and consider the implications for Seafish's future role.
- H.** Monitor the provision of seafood training across the UK and take action to address any deficiencies identified in the coverage/activity of Seafish's Approved Training Providers and Seafood Training Networks.
- I.** Provide effective administrative support to instructors and training providers delivering Seafish training programmes, including the administration of any available funding, the maintenance of accurate training records and the provision of expert advice and guidance on training matters.



- J.** Develop new training materials to support offshore and onshore business needs including:
  - Reviewing/updating our Introduction to Commercial Fishing courses for new entrants and our Basic Safety course for foreshore gatherers;
  - Developing new training materials on sustainable fishing and aquaculture health and safety; and
  - Expanding our onshore training e-learning content and piloting remote delivery of key onshore training courses.
- K.** Complete a strategic review of the seafood industry's needs for the training of new entrants and workers, evaluating the effectiveness of Seafish's support and producing a plan outlining how our future support can be targeted for maximum impact.

## Challenge 4:

Balancing the need to secure sustainable supply while ensuring we meet consumer demands for supply chain integrity.

Our goal is to work in partnership with seafood stakeholders to secure the broad supply base required by the UK industry, and to support the responsible sourcing and supply chain integrity demanded by UK consumers. We consider that a sustainable and responsible seafood sector is the minimum standard that all parts of the supply chain should stick to.



While the full implications of Covid-19 on the responsible sourcing agenda are still unclear, indications are that consumer safety and the need to demonstrate trust and confidence in the seafood supply chain will remain paramount.

**Our proposed work programme to support Challenge 4 during 2020/2021 will include the following activities:**

- A.** Complete an economic assessment of the UK aquaculture sector to demonstrate the potential value the industry could deliver under a range of scenarios.
- B.** Facilitate the Shellfish Stakeholder Working Group as a mechanism to bring industry and government agencies together to work in collaboration on water quality issues that are affecting the growth of the shellfish sector. A priority initiative will be the successful delivery of the project to develop an assurance scheme for shellfish and human health.
- C.** Providing support to a network of devolved aquaculture leadership groups, and related UK-wide initiatives such as the Seafood 2040 Aquaculture Leadership Group.
- D.** Working collaboratively with industry, government and the environmental NGO community to ensure that marine management measures provide the required environmental protection whilst having the least impact on the seafood sector.
- E.** Gathering and sharing expertise to enable the catching sector to better utilise gear selectivity in wild capture fisheries to address bycatch issues and minimise damage to benthic habitats – including maintaining the Seafish Gear Database as a widely used source of expert information.
- F.** Assist the sector to source and secure a continuous and compliant supply of sustainable raw material from outside the UK by:
  - Informing industry of circumstances in supply countries that could impact on material availability such as food safety alerts or Illegal, Unreported and Unregulated activities; and
  - Bringing together policy makers and industry to discuss current industry issues and regulatory proposals.
- G.** Progressing work on the UK's future fisheries management framework in collaboration with industry and central government; including delivering the 'Future of our Inshore Fisheries' project and enabling a suite of co-management initiatives e.g. Shellfish Industry Advisory Group and Whelk Management Group.
- H.** Deliver an updated and enhanced version of the Risk Assessment for Sourcing Seafood (RASS) tool to enable seafood buyers to develop responsible sourcing strategies and make informed sourcing decisions in relation to wild fisheries.



- I.** Continue to facilitate the Seafish Issues Groups, using online video conferencing tools as required, to support responsible sourcing and supply chain integrity.
- J.** Support two industry-led initiatives on welfare and human rights in the seafood supply chain; the Fishermen’s Welfare Alliance and the Seafood Ethics Action Alliance.
- K.** Provide expertise and analysis to help the seafood supply chain to respond to issues relating to environmental sustainability (including providing support to the North Atlantic Pelagic Advocacy Group).
- L.** Provide practical information and guidance to help the seafood supply chain understand the requirements of meeting different social responsibility obligations, such as modern slavery legislation.
- M.** Support the seafood sector to respond to issues associated with plastics/micro-plastics in the seafood supply chain by:
  - Ensuring up-to-date and relevant information on the issue is available;
  - Signposting the sector to initiatives that support improved management and issue mitigation; and
  - Working in collaboration with the sector to provide accessible and up-to-date consumer information.



- N.** Progress initiatives to improve the knowledge base of key data limited fisheries including:
- Supporting Project-UK Fisheries Improvement initiatives to enable prioritised stocks to achieve MSC certification goals; and
  - Reviewing the Ecological Risk Assessment of the effects of fishing in South West England.
- O.** Collaborate with industry, government and other stakeholders to develop a series of resources to inform fish welfare practices, including:
- Best practice guides covering fish welfare practices across different fishing types; and
  - Updating and revising live crustacea handling guidance to ensure latest welfare considerations are included.
- P.** Finalise the Responsible Fishing Ports Scheme to ensure it is accessible for all ports, regardless of size, and confirm arrangements for its future management.

## Challenge 5:

Enabling access to data and research to support decision making and to drive innovation and growth.

Our goal is to ensure UK seafood businesses can draw upon the expert advice, knowledge, insight and data they need to inform decisions to deliver increased business prosperity. As the UK seafood sector seeks to recover from the impact of Covid-19 while preparing to adapt operations for life outside the EU, the ability to access timely and relevant data and information is more critical than ever.





**Challenge 5** also has a key role in providing much of the data and evidence to underpin the work delivered across the other four challenges.

**Our proposed work programme to support Challenge 5 during 2020/2021 will include the following activities:**

- A.** Facilitate the Seafish Expert Panel (SEP) to provide expertise to support our project delivery and to assist industry to respond to business issues. The SEP will have a key role in advising on research into the implications of Covid-19 on the seafood supply chain.
- B.** To help mitigate climate change, update and enhance the Seafish carbon toolbox to account for wild capture and aquaculture production, so as to enable greenhouse gas emissions to be calculated across the UK seafood supply chain and at an individual company level. Use the findings to assist the UK seafood industry transition to low carbon operations.
- C.** Maintain a watching brief across the UK seafood industry landscape for emerging and ongoing strategic changes and map these changes from a corporate, regional, national and international perspective.
- D.** Undertake special reviews on strategic changes identified through **Challenges 1-4**, including implications of EU Exit transition and Covid-19 on the seafood supply chain (as required).
- E.** Collect financial, economic and social data from across the UK catching and processing sectors to produce robust data sets on seafood sector performance, and find innovative ways to make these available to government and industry.
- F.** Conduct economic analysis and provide advice, to support business decision making and policy development, on matters affecting the seafood supply chain.
- G.** Continue to build the evidence base to demonstrate the wider public good and services that the seafood industry delivers (e.g. food security, public health, marine protection). This will include work on assessing the contribution that seafood harvested from the UK Exclusive Economic Zone (EEZ) makes as part of the wider UK and global marine resource.
- H.** Continue work on mapping Marine Protected Area locations across the UK to support industry compliance and to enable more reliable assessments of their impact on fishing activities.

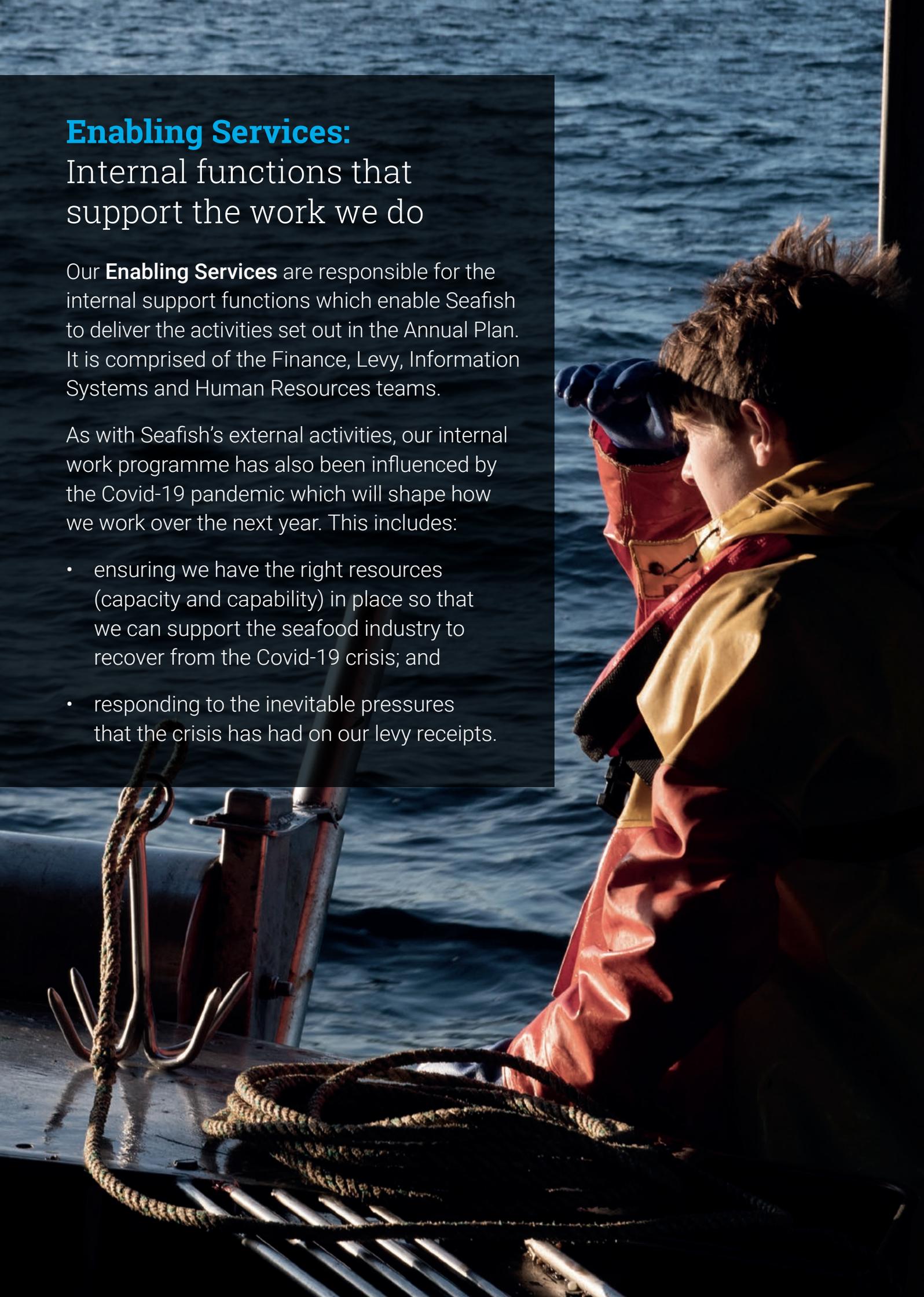
## Enabling Services:

Internal functions that support the work we do

Our **Enabling Services** are responsible for the internal support functions which enable Seafish to deliver the activities set out in the Annual Plan. It is comprised of the Finance, Levy, Information Systems and Human Resources teams.

As with Seafish's external activities, our internal work programme has also been influenced by the Covid-19 pandemic which will shape how we work over the next year. This includes:

- ensuring we have the right resources (capacity and capability) in place so that we can support the seafood industry to recover from the Covid-19 crisis; and
- responding to the inevitable pressures that the crisis has had on our levy receipts.



### The priority focus for our **Enabling Services** during 2020/21 will be to:

- A.** Ensure internal infrastructure is in place to enable us to respond to the needs of businesses operating across the seafood supply chain during the Covid-19 pandemic.
- B.** Progress our digital transformation work programme to ensure that we have the baseline IT systems in place to allow us to work efficiently and effectively.
- C.** Implement a strategic wellbeing programme, linked to the Scottish Centre for Health Working Lives, to support the wellbeing of our teams and to provide an external benchmarking tool as we strive to be a leading organisation in workplace culture.
- D.** Progress work on the Seafish website to ensure it is stable, that it meets legal accessibility requirements, and that it can effectively communicate our work to a range of audiences.

Alongside this our enabling services teams will continue to deliver their core responsibilities as outlined below to ensure all staff are equipped to support the UK seafood industry through these challenging times and beyond.

### **Human Resources**

Delivering a collaborative and strategic approach to resourcing, succession planning and recruitment to ensure we continue to attract and retain expert people while enabling and facilitating opportunities for the personal growth and development of staff.

### **Finance**

Delivering effective financial systems, robust internal controls to safeguard our assets, and timely and cost-efficient processing of transactions. The team is also responsible for ensuring:

- A.** That the Seafish Board and Seafish Executive have full awareness of the financial implications of business decisions, to support effective decision making.
- B.** Internal processes and external reporting are compliant with statutory and other regulatory financial regulations and reporting requirements.
- C.** That our five Challenge Groups are equipped to be financially flexible so we can respond to the changing needs of the industry.

### **Levy**

Ensuring the timely and effective collection of the Seafish levy.



Here to give the UK seafood sector  
**the support it needs to thrive.**

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