



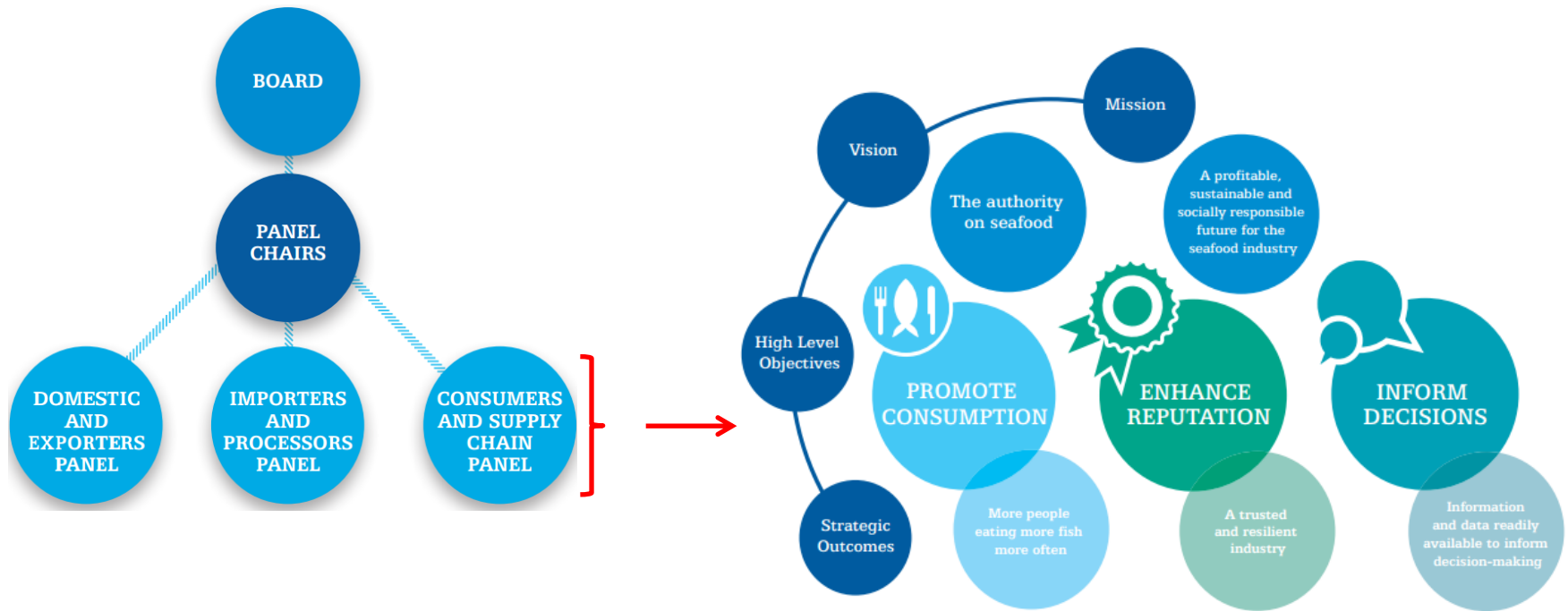
Seafish and Aquaculture

Tom Pickerell - Technical Director
SDAAC, London. 6th May, 2016

SF and Aquaculture: Levy

- Levy on all 'wet' farmed marine animal species:
 - NOT canned or bottled/salmonids/tilapia/pangasius
- ~5% of levy from aquaculture production e.g.:
 - Imported shellfish (e.g. warm-water prawns)
 - Fishmeal imports
 - Sea bass / Sea bream
 - UK farmed shellfish e.g. mussels

Seafish Structure and HLOs






Seafish: http://progress.seafish.org/images/uploads/downloads/Seafish_Corporate_Plan.pdf

Aquaculture in the Corporate Plan

HLO	Enhance Reputation		Promote Consumption		Inform Decisions
Strategic Outcome	A trusted and resilient industry.		More people eating more fish more often.		Information and data to inform decision making is readily available.
Seafish Objective	Enable the industry to make informed and ethical business decisions.	Ensure the industry is better understood by regulators, media and consumers.	Create the tools to help industry increase the consumption of seafood.	Ensure seafood is well trusted and understood by regulators, media and consumers.	Provide information to ensure the strongest foundation for the delivery of Seafish goals.
How will this programme meet Seafish objectives?	Co-ordinate understanding of key issues and opportunities across stakeholder groups and the wider sector to ensure a collaborative approach, ensuring alignment to the Seafood Integrity work programme.	Work on regional strategies will ensure that regulators are informed and aware of the requirements of the industry. A dedicated, well qualified, aquaculture manager will field all media enquiries in this area.	Supporting the sector to achieve responsible and sustainable growth will allow it to promote increased consumption with confidence.	Continuing and strengthening our work on viral and algal toxins will provide reassurance to the supply chain.	The purpose of the proposed aquaculture programme is to be the one-stop-shop for Seafish's aquaculture work.

Domestic Aquaculture 2015/16

PROJECT	TARGETS 2015-2016	PROGRAMME
<p>DOMESTIC AQUACULTURE STRATEGY</p> <p>Development of the work programme's strategy taking the requirements of each nation into account.</p>	<ul style="list-style-type: none">• New Aquaculture Manager settled into post with positive working relationships established amongst key colleagues and stakeholders both internally and external to Seafish.• A wide range of stakeholders, both engaged to identify and agree the main challenges and opportunities facing the Aquaculture sectors in each country.• A work programme strategy scoped out for each nation with key stakeholders input, including government, to ensure successful delivery of projects in years 2-3.	<p>Domestic Aquaculture</p> <p>We will facilitate a collaborative approach to the delivery of local and national strategies by representing aquaculture interests to key stakeholders in government and industry.</p>
		
<p>WORK PROGRAMME OVERALL KPI</p> <p>National Government's belief that the Seafish Aquaculture programme has contributed positively to the development of national strategies - measured by testimony.</p>		
<p>WORK PROGRAMME ANNUAL TARGET FOR 2015-16</p> <p>Work programme strategy developed for each nation.</p>		

Domestic Aquaculture 2016/17

PROGRAMME	PROJECT	TARGETS 2016-2017
<p>Domestic Aquaculture</p> <p>Guided by the Seafish Aquaculture Advisory Committee, the Domestic Aquaculture Programme will deliver projects to support and expand the UK aquaculture industry.</p>	<p>SEAFISH DOMESTIC AQUACULTURE ADVISORY COMMITTEE (SDAAC)</p> <p>Establish the committee who will oversee and advise on the delivery of the Domestic Aquaculture Strategy.</p>	<ul style="list-style-type: none"> Establish the Seafish Domestic Aquaculture Advisory Committee (SDAAC). Three SDAAC meeting per year. Manage delivery of projects approved by SDAAC in line with the Seafish Corporate Plan and UK Multi Annual National Plan.
<p>WORK PROGRAMME OVERALL KPI</p> <p>National Government's belief that the Seafish Domestic Aquaculture Strategy programme has contributed positively to the development of national strategies - measured by testimony.</p>	<p>ENGLISH AQUACULTURE STRATEGY</p> <p>Completion and delivery of English Aquaculture Strategy legacy projects.</p>	<ul style="list-style-type: none"> Completion of Phase 1 of the Aquaculture Regulatory Toolbox to be hosted on the Seafish website, developed in collaboration with CEFAS. Publication of Economic report and analysis of findings. Publication of SRO report and analysis of findings.
<p>WORK PROGRAMME ANNUAL TARGET FOR 2016-17</p> <p>Positive testimonies received from key Aquaculture industry representatives and policy makers in each devolved nation.</p>	  	

Seafish Advisory Committees

- SF forums by which industry representatives can input into our decision making process
- Work programmes guided by ACs in:
 - Northern Ireland - Seafish Northern Ireland Advisory Committee (SNIAC)
 - South West England - Seafish SW Advisory Committee (SSWAC)
 - Wales - Seafish Wales Advisory Committee (SWAC)

Seafish Domestic Aquaculture Advisory Committee (SDAAC)

Terms of Reference

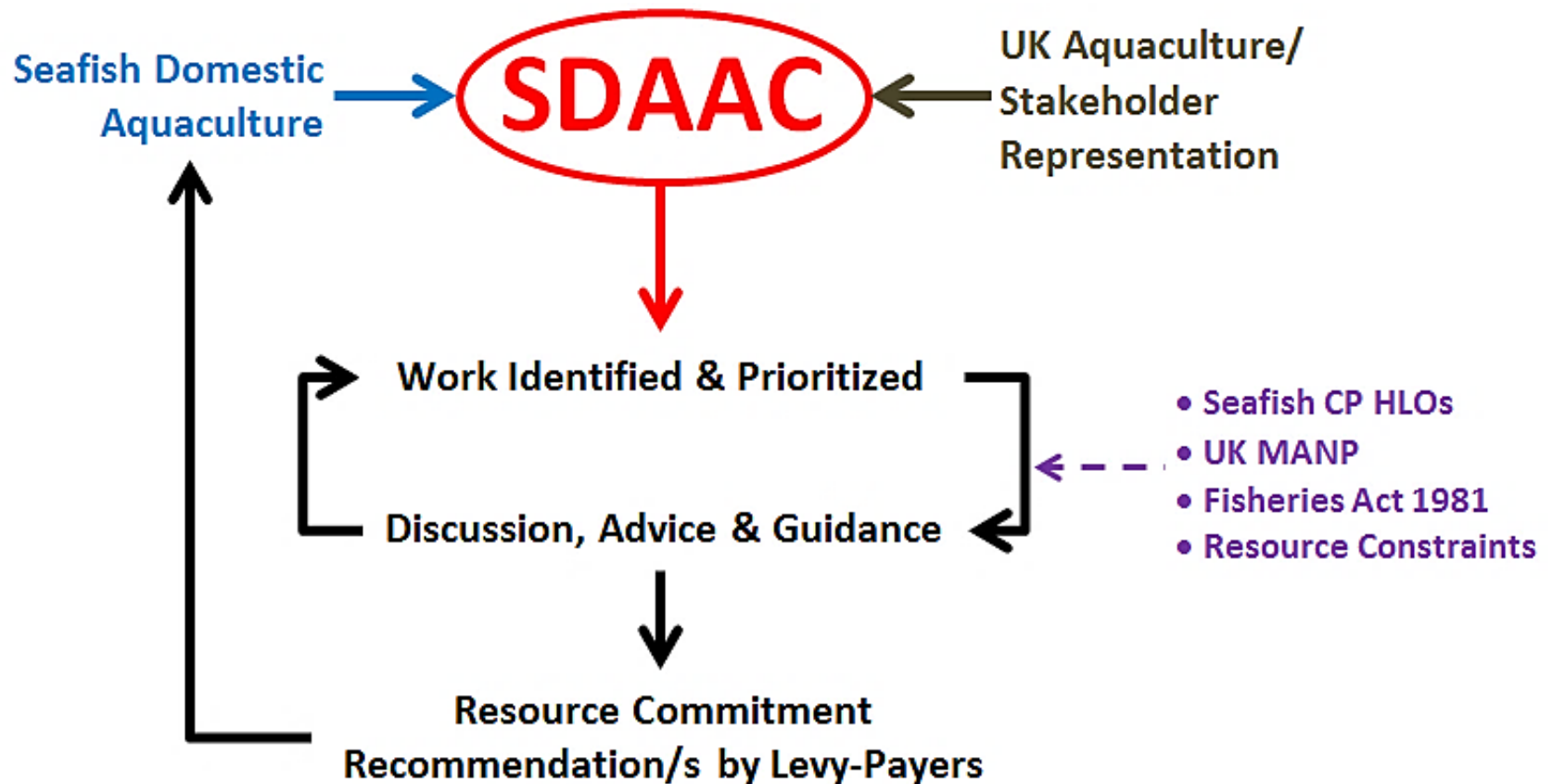
The Seafish Domestic Aquaculture Advisory Committee (SDAAC) provides a forum by which the aquaculture industry across the UK through its representatives can input into the decision making process of the Seafish Domestic Aquaculture Programme.

The Advisory Committee will meet between two and three times a year and be chaired by an elected SDAAC member. Seafish will provide the secretariat and ensure that members of the committee have adequate notice of meetings and agenda items. SDAAC will advise on the work of the Seafish Domestic Aquaculture Programme. The Seafish Domestic Aquaculture Manager will facilitate SDAAC meetings and ensure that UK industry stakeholders are briefed on existing relevant Seafish work areas and opportunities for action.

The SDAAC is expected to provide recommendations for resource commitment in achieving the aims of the Seafish Domestic Aquaculture Programme. All recommendations must align with the Seafish's High Level Objectives¹, be within resource constraints and not be contrary to the Fisheries Act 1981.

The membership of SDAAC is representative of the aquaculture industry in the UK from producers to Governmental bodies. All members are invited to participate in discussions but resource decisions will be limited to levy-payers².

How SDAAC Will Work...





Domestic Aquaculture Programme – Year 1 Progress & the SDAAC

Lee Cocker - Aquaculture Manager
SDAAC, London. 6th May, 2016

Overview

- **Commissioned Reports**
 - Several and Regulating Orders
 - Economic Assessment
- **Strategic Investment Fund Projects**
 - SIF - SW England
 - SIF - South Wales
- **Online Resources**
 - Aquaculture Funding Guides
 - Aquaculture Regulatory Toolbox for England

1. SRO Report

- SROs inhabit a ‘grey area’ within the legislative landscape in regards to ‘enhanced fisheries’, and /or ‘capture-based aquaculture’ and ‘aquaculture’ *per se*
- Have enabled and enhanced UK shellfish production, what will be their future role in UK shellfish production?

“UK Shellfish Production: The Contribution and Value of Several and Regulation (and Hybrid) Orders in Relation to the Sectors Past Development and Future Growth”

- Working Sea consultancy commissioned

Key Outcomes and Deliverables

- Case studies demonstrate the value of SROs to shellfish producers - long-term development / coherent management by individuals / IFCAAs
- Highlight shortcomings/failings of the current SRO system
- Put forward recommendations for the future of SROs
- Assist Defra to update SRO guidance and procedures
- Final document expected by Q1

2. Aquaculture Economic Report

- “Assessment of the Benefits to Scotland of Aquaculture” 2014
- Understanding of the contribution that the main aquaculture sub-sectors make to EWNl economies / localised scales
- *“Analysis of the Economic Contribution and Value of the Major Aquaculture Sub-Sectors and Most Important Farmed Aquatic Species in England, Wales and NI”*
- Hambrey Consulting commissioned
- DA representatives forming Steering Group

Key Outcomes and Deliverables

- Utilise data to understand current situation / economic value
- Quantify / describe routes to market key species products
- Identify business issues, barriers to growth, and opportunities
- Identify interventions / how they would work, to encourage growth of aquaculture sectors in England, NI and Wales

Report will define and demonstrate quantitatively the economic performance of the sector and how the situation could be improved and capacity increased

- Final document expected by Q1

Strategic Investment Fund (SIF)

- £800,000 fund
- Opened July 2015
- 16 contracts have been awarded / 6-30 months
- Many applications, inc. aquaculture - two applications with specific/major aquaculture focus successful
- Seafish own IP of projects

Seafish: <http://www.seafish.org/industry-support/funding-and-awards/funding/strategic-investment-fund>

1. SIF – SW England

“The Feasibility of an Aquaculture and Fisheries Research and Development Centre at Brixham Laboratory”

Brixham Laboratory: Blue Environmental Hub

- Project lead Sustainable Leadership Ltd. on behalf of Plymouth University

Key Outcomes and Deliverables

- Stakeholder engagement - inc. production, processing and retail - 2 day workshop planned
- Funding streams identified and targeted
- Centre options identified and assessed
- Top-level strategic business plan

2. SIF - South Wales

“Closing the Circle - A Blueprint for Sustainable Aquaculture in Tidal Lagoons from Hatchery to Plate”

Consortium of aquaculture businesses with TLSB

- Mumbles Oyster Company, Aquafish Solutions, Seasalter

Project aims to inform and enable the development of new aquaculture businesses in both

- TLSB and other similar sheltered water sites inc. disused areas of commercial ports and natural embayments

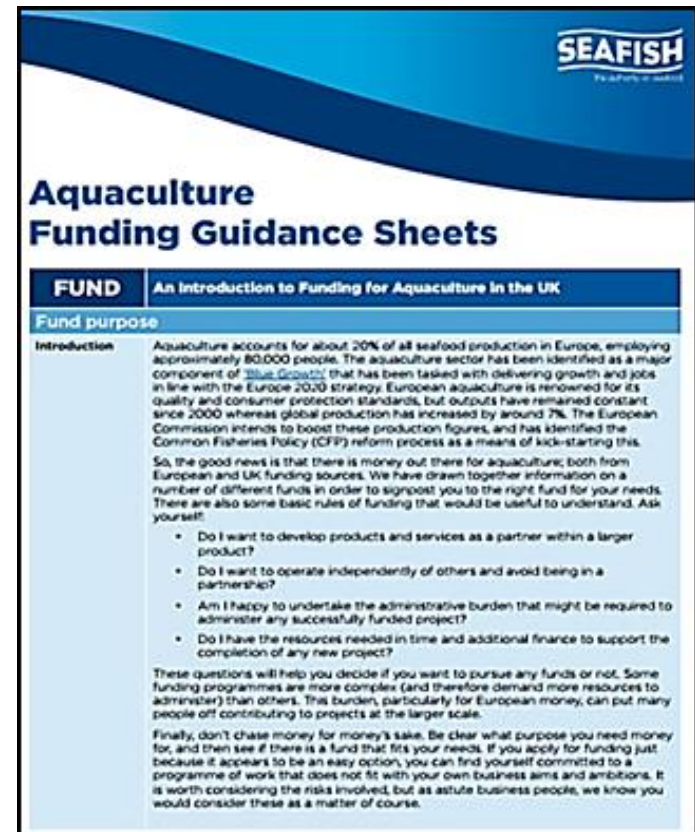
Key Outcomes and Deliverables

- Scoping out marine species/methodologies that may be suitable in TLSB or similarly sheltered locations
- Design/costing multi-species shellfish hatchery/spatting ponds

Aquaculture Funding Guides

- Summary information, links and contacts on securing aquaculture funding in the UK
- 17 individual funding stream PDFs: 13 from Europe, and 4 from within the UK

Seafish: <http://www.seafish.org/industry-support/aquaculture/aquaculture-funding-guides>

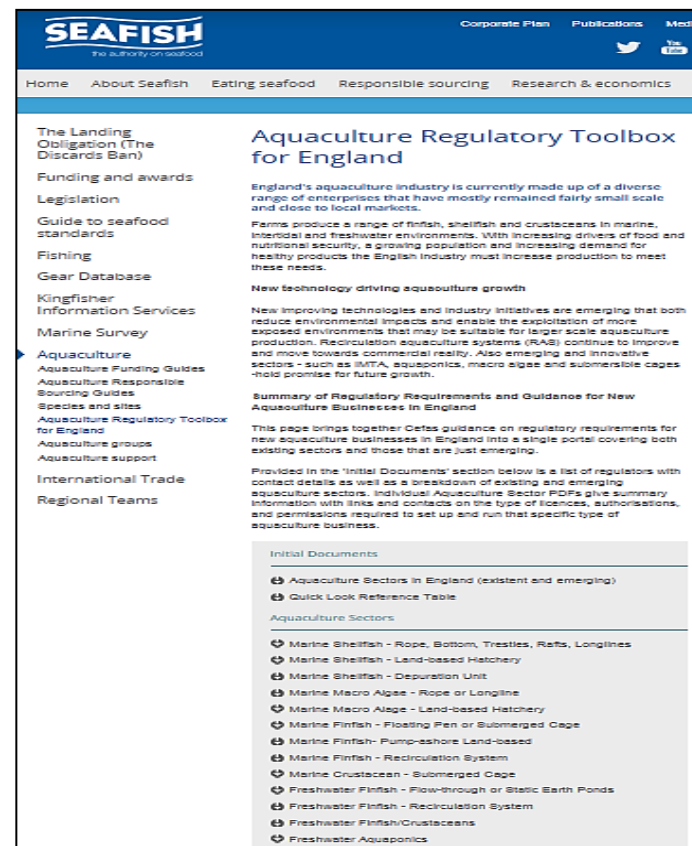


Aquaculture Regulatory Toolbox for Eng. Ph1

- 13 individual aquaculture sector PDFs
- Summary information, links and contacts on the type of licences, authorisations and permissions required to set up and run a specific type of aquaculture business

Ph2: Regulators guidance (2016-17)

- Build on P1 guidance site
- Contextualise developments for regulators
- Improve consistency of the way aquaculture is treated



Seafish: <http://www.seafish.org/industry-support/aquaculture/aquaculture-regulatory-toolbox-for-england>

GOV.uk: <https://www.gov.uk/guidance/fish-shellfish-or-crustacean-farm-authorisation>

RASS Aquaculture Profile Development

- Build on the wild RASS fisheries profiles
- Simple, user-friendly and familiar format
- Provides background information
- Highlights key risks buyers need to know
- Does not say “best choice” or “avoid”
- Collates schemes relevant to that group/species in a single, accessible place
- Can be updated easily e.g. highlight GSSI benchmarked certification
- Scope to develop further

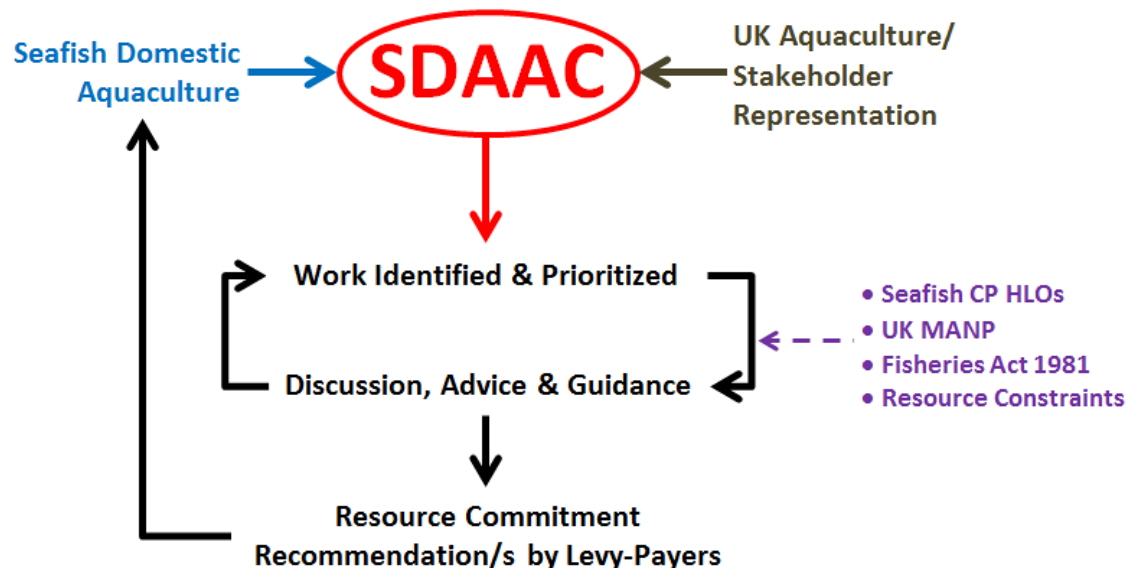
English Aquaculture Working Group (EAWG)

- EAWG derived from 2012 talks to develop an English Aquaculture Strategy
- Inclusive forum facilitated by Seafish to discuss strategic issues related to English aquaculture and its development
- Energy and engagement 'dipped'
- 2015/16 two meetings held

Seafish: <http://www.seafish.org/industry-support/aquaculture/aquaculture-groups/england-aquaculture-consultation-group>

From EAWG to SDAAC

- Many issues pertinent to England are not 'standalone' but cross-border and frequently apply UK-wide
- EAWG has evolved to become the SDAAC – wider membership and inc. representatives from all 4 nations





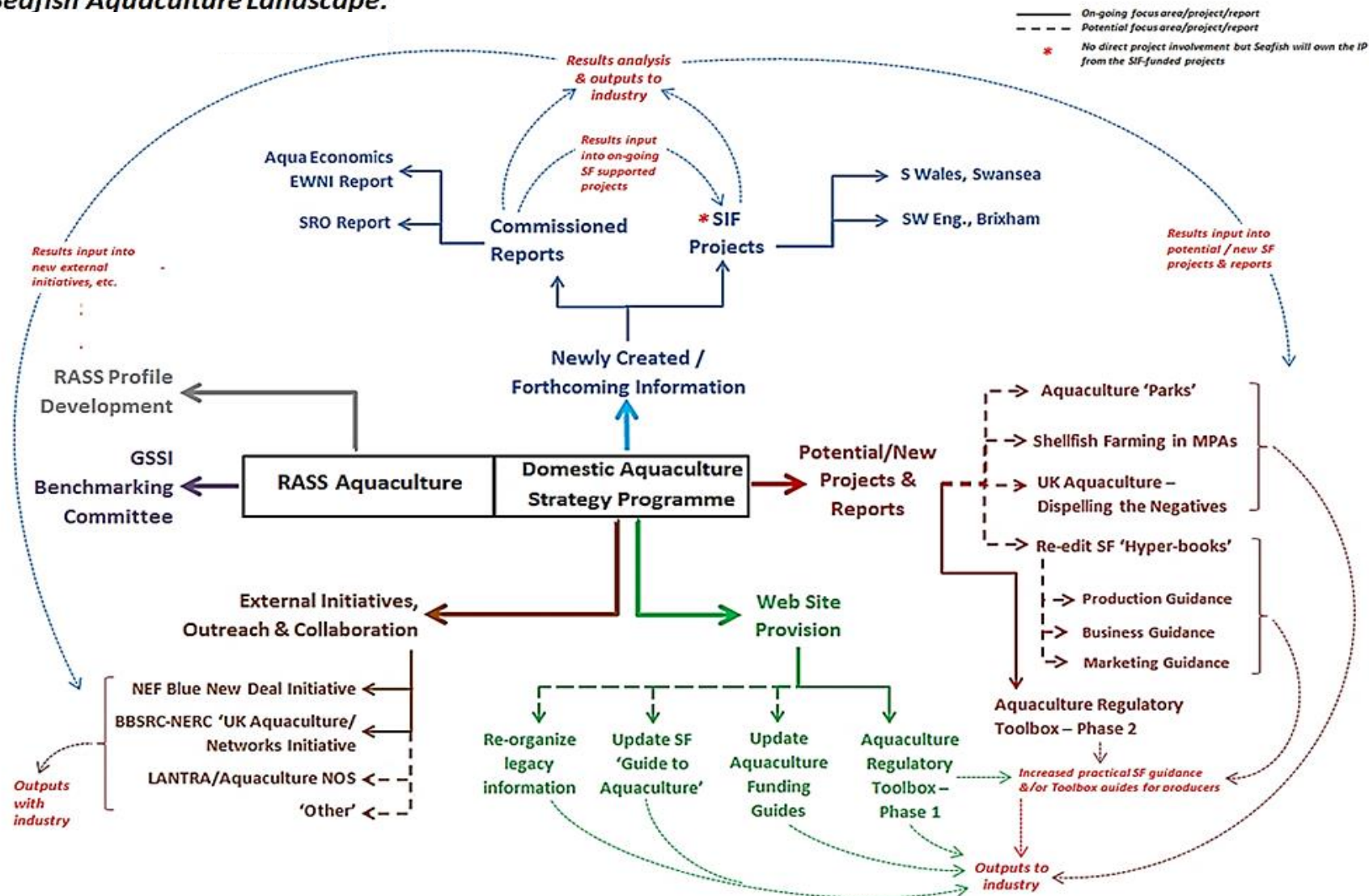
Domestic Aquaculture Programme – Year 2 Draft Strategy

SDAAC, London. 6th May, 2016

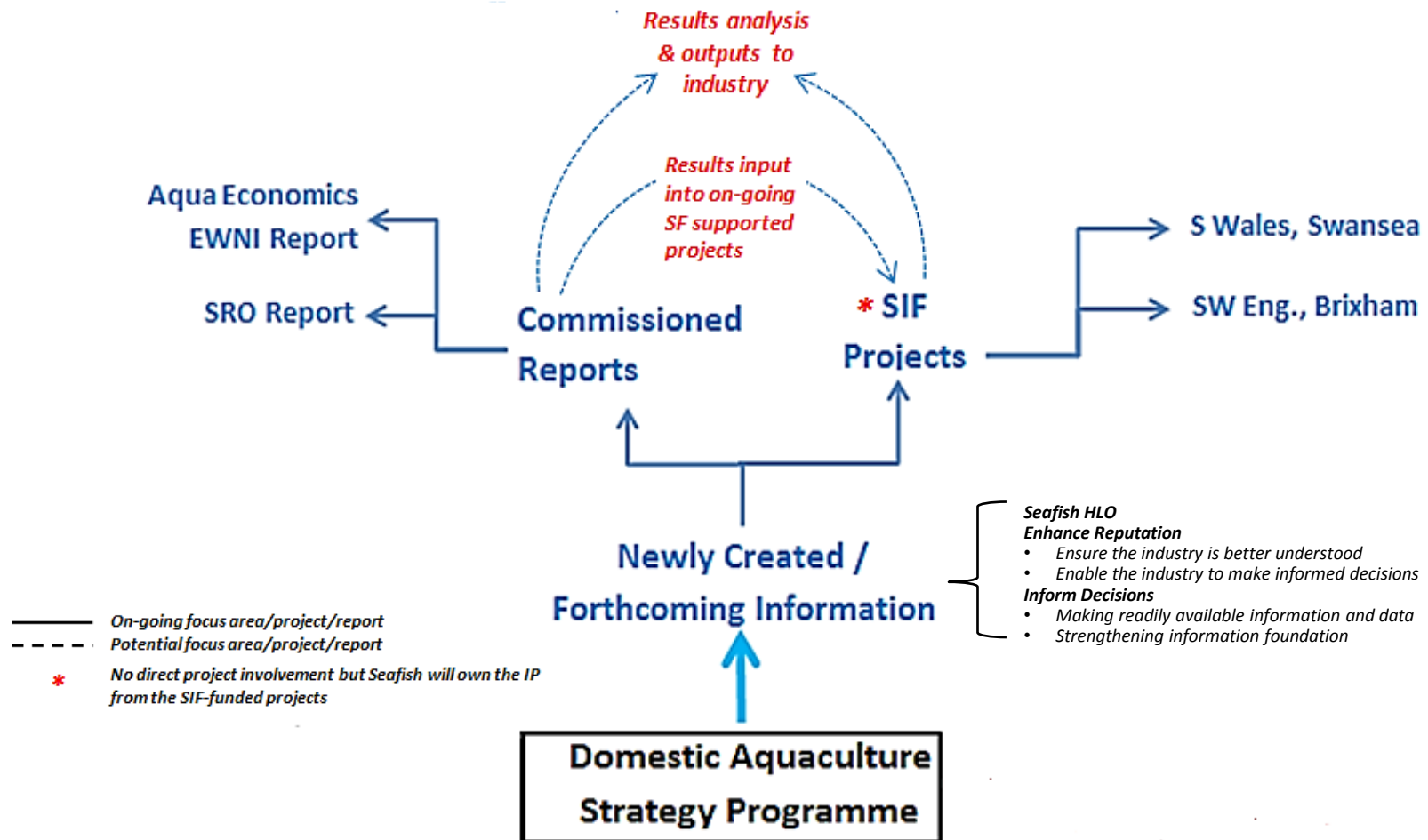
Overview

- SF Aquaculture Landscape
- Describe Main Landscape Elements
 - Present On-going and Prospective Work Areas Within Each Element

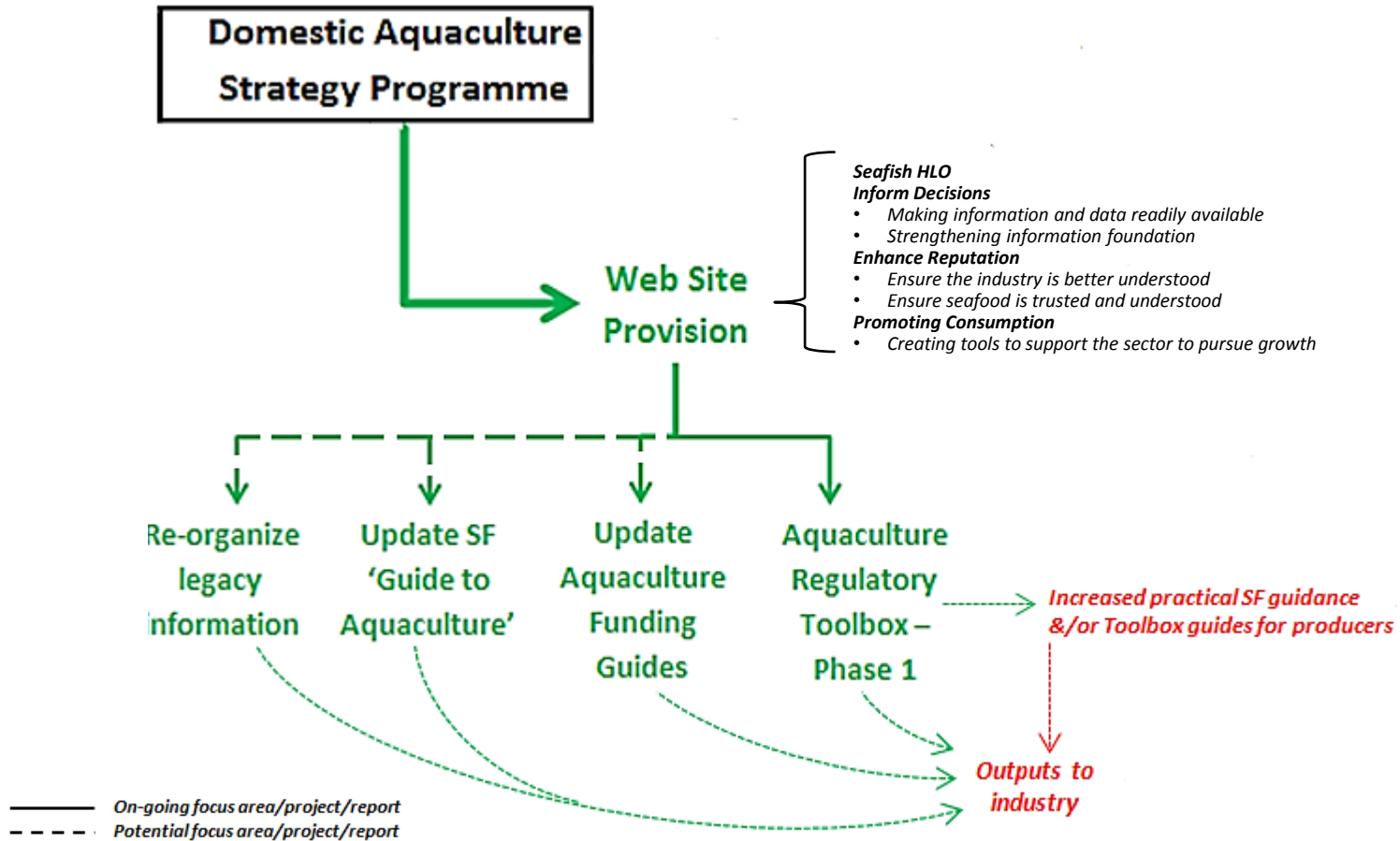
Seafish Aquaculture Landscape:



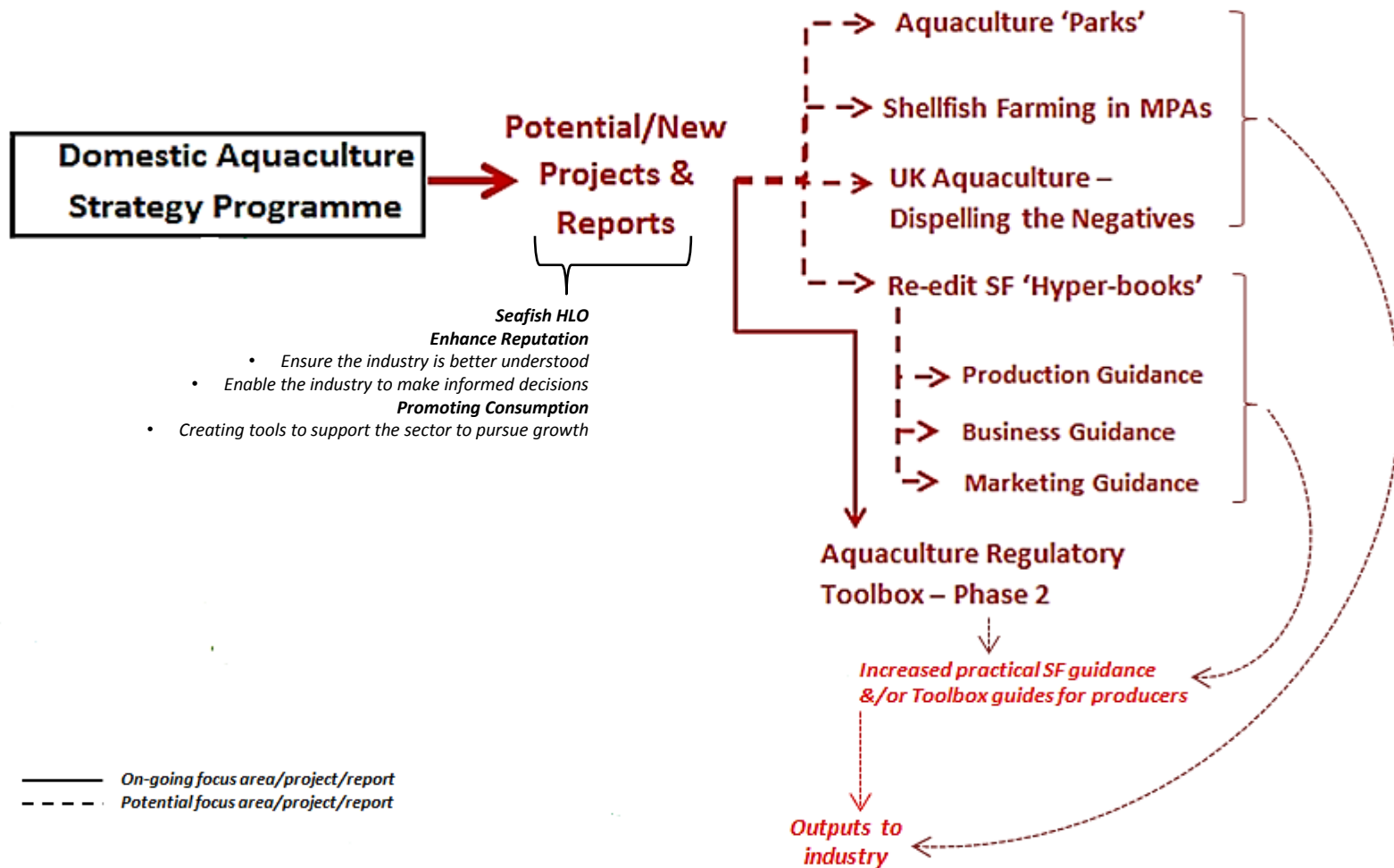
Element 1



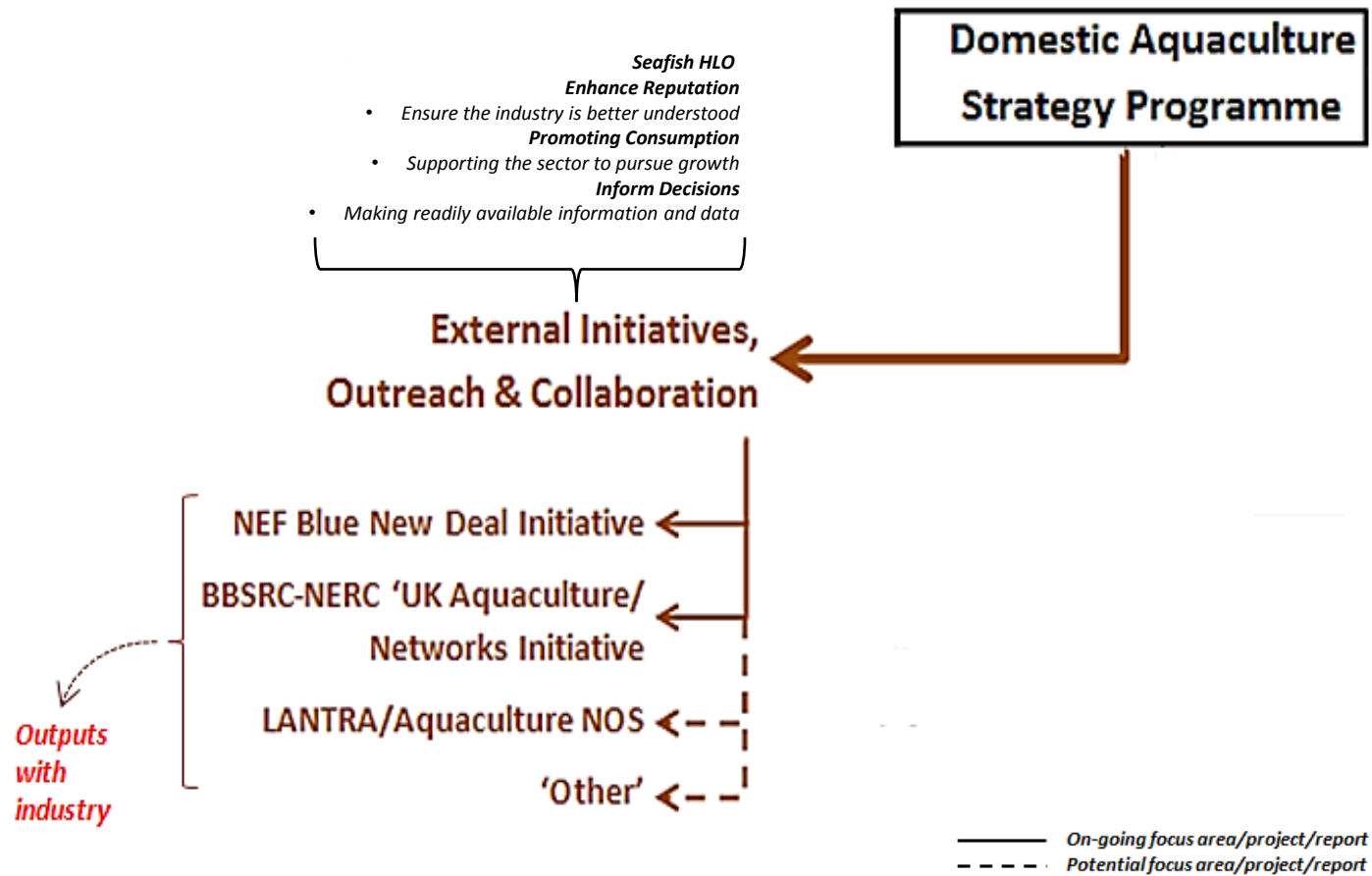
Element 2



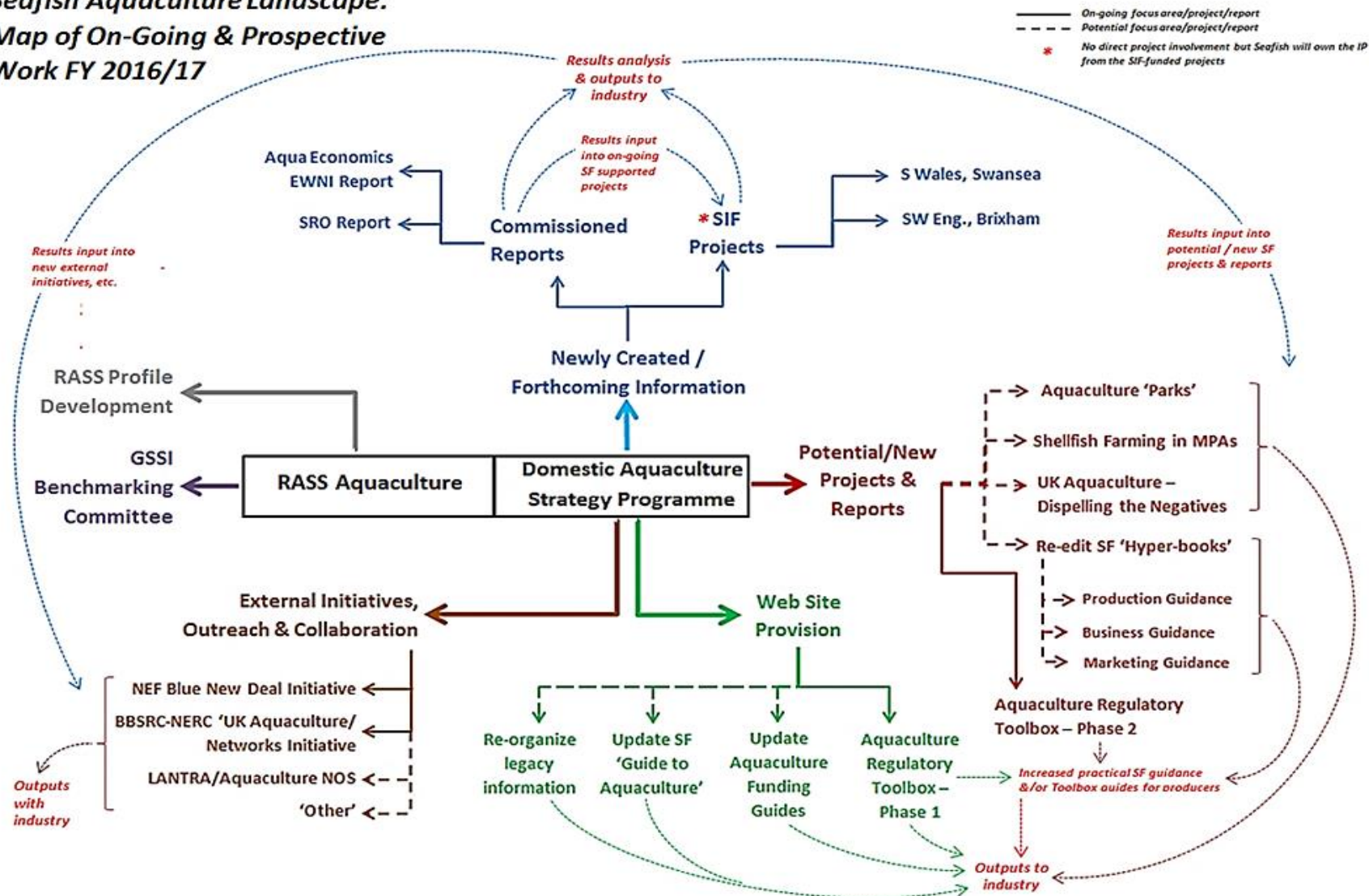
Element 3




Element 4



Seafish Aquaculture Landscape: Map of On-Going & Prospective Work FY 2016/17





With SDAAC guidance - identify, prioritize and agree work focus in order to...

- Continue building programme foundations
- Strengthen and enhance the developing SF aquaculture landscape
- Exploit the inter-relationships between programme 'elements'



Thank you

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