

**Note of meeting held at Friends House, London. Tuesday 13 September 2022.**

For the Common Language Group minutes and meeting presentations see:

<https://www.seafish.org/responsible-sourcing/seafood-issues-groups/the-seafood-ethics-common-language-group/>

### **CLG in person meeting. Current challenges and future opportunities for seafood.**

The Russian invasion of Ukraine has had significant implications for the UK seafood supply chain. This meeting looked at the challenges facing the industry as a result of the ongoing impact of the Russian invasion of Ukraine and the introduction of tariffs; as well as focussing on the challenge of increasing inflation, and the specific issues facing the finfish and shellfish sectors. The afternoon session looked at future opportunities for the UK catching sector, covering Government priorities and how funding is supporting innovative approaches to increase efficiency and reduce carbon emissions.

### **Attendees**

#### **1. Welcome, introductions, and apologies**

Stuart McLanaghan welcomed everyone to the meeting.

#### **\*Speaker and/or panellist**

*Abby Johns	Defra
Adam Wing	Seafood Scotland
Aisla Jones	Sustainable Fisheries Partnership
Alexa Tonkovich	Lotus UK
Alistair Moseley	Defra
*Andrew Kuyk	UK Seafood Industry Alliance
Andrew Nicholson	2 Sisters Food Group
Charlotte Coombes	Marine Conservation Society
Charlotte Llewellyn	SafetyNet Technologies
Chloe North	Western Fish Producers' Organisation Ltd
Clarus Chu	WWF
Daniel Auwkit	Macalister Elliott and Partners (MEP)
Dave Parker	Sainsbury's
David Brooks	Seafish
David Shuker	Defra
Doug Beveridge	Thistle Seafoods Ltd
Duane Forrington	Iceland Seafood UK
*Elinor Brett	Defra
Emily Wardrop	Key Traceability
Felix Ameye	Seafish
*Frank Fleming	Verifact
Gavin Hatton	Seafish
Giles Bartlett	Whitby Seafoods
*Giles Bones	MSC
Harry Owen	MRAG Limited
Hayley Swanlund	WWF-UK
Hrannar Asgeirsson	Northeast Atlantic Fisheries Commission

*Iain Lowrie	Sofina Foods
Iain Shone	Global Seafood Alliance
Jane Bush	Crustacean Compassion
Jessica Saunders	Defra
Jo Pollett	MSC
*Joe Cooper	Seafish
John Pearce	MRAG Limited
Juliette Hatchman	SWFPO
*Kara Brydson	Fisheries Innovation Scotland
*Karen Green	Seafish (Secretariat)
Lief Hendrikz	WWF
*Loren Hiller	Marine Stewardship Council
Louise McCafferty	Joseph Robertson
Louise Rutterford	MCS
Maria Lacunza	Defra
Matt Darlison	Defra
Meinhard List	GER Embassy
Mike Berthet	Aquaesea Ltd
Mike Cohen	National Federation of Fishermen's Organisations
Mike Dowell	Defra
Mike Platt	RS Standards
Robyn Newland	Defra
Ruth Hoban	NESI
Sam Peacock	Peacock Marine
Scott Johnston	Young's Seafoods Limited
Stuart McLanaghan	Seafish
Thamy Duffield	Defra

### Apologies

Adam Chevreau-Kareliussen	Lovering Foods
Andrew Johnson	MarfishEco Limited
Aoife Martin	Seafish
Cassie Leisk	NESI
Chris Williams	ITF
Jeff Halliwell	Seafish Board
Julie Waites	Frozen at Sea Fillets Association - FASFA
Linda Wood	M&S
Kate Kurton	Defra
Martin Jaffa	Callandar McDowell
Mark Greet	Falfish
Max Goulden	Macalister Elliott and Partners (MEP)
Mike Cohen	NFFO
Mike Mitchell	Fair Seas
Robyn Cloake	LFF UK ( Lyons)

**Current challenges (Ukraine, tariffs, inflation) – retail price inflation**  
[UK whitefish trade analysis](#). Joe Cooper, Seafish.

[How the cost of living crisis is affecting UK seafood consumption](#). Iain Lowrie, Sofina Foods.

**Challenges across the board. Andrew Kuyk, Provision Trade Federation/Seafood Industry Alliance.**

We have the supply paradox. We import 80% of what we eat and export 80% of what we catch. The sector has had the interlocked challenges of Brexit, Covid and Ukraine.

- Prior to Brexit the EU was the primary market for UK exports. Brexit changed that. Fish was one of the 'flash points'. It has had a major impact on freedom of movement and labour availability. We currently have low unemployment figures. We need a pool of people.
- Covid has had a major impact on food and on labour availability as well. It has fundamentally altered the marketplace – retail sales went up and more eating at home. There is no clear planning script now. How much cooking is required is also a factor? Fish is the most traded of all food products with a lot moving through China. Container routes have been disrupted. This was then impacted by the issue in the Suez Canal and Felixstowe strikes. And the whole distribution side is impacted by not enough HGV drivers.
- Ukraine. As Covid eased we saw energy demand surge, which is an early driver of inflation and energy shortages., followed by the Russian invasion of Ukraine. Russia and Ukraine are major suppliers of energy, wheat, sunflower oil, and packaging (wood pulp). The avowed intention in Europe is to reduce our reliance on Russian energy. Russia is also responsible for 40% of global whitefish production.

#### Discussion

- **Q. Are volumes sold on deals i.e., buy two get one free deals decreasing?**  
**A.** Multiple retailers can't afford these promotions at the moment and have moved away from these, and as a result volumes are declining.
- **Q. What is the effect of consumers looking at their own food waste?**  
**A.** You would expect an increase in frozen sales, but this is not happening. Frozen packs are often bigger, and consumers seem to be buying for the now. Health is still at the forefront, but often in a time of economic crisis, health take more of back seat. Retailers have reduced choice and the range is smaller.
- **Q. Where is the opportunity to build resilience in UK supply chains?**  
**A.** There is no obvious answer and no silver bullet. Cod is in decline and pollock could be the value answer. During the financial crisis of 2008 new species were introduced, but it is not clear what other species could be introduced.
- The industry has weathered a number of shocks and the new normal is changing. The seafood industry is constantly changing and needs to attract younger consumers. When compared with other proteins seafood has less of a carbon footprint. The protein on the plate should be interchangeable.

#### Future opportunities

**Priorities for Government on future catching policy post the landing obligation, and on Remote Electronic Monitoring (REM). Elinor Brett, Domestic Fisheries and Reform, Defra.**

The Government needs accurate data on what is being caught, and how to avoid unintended catches in the first place. A big focus is on REM (integrated onboard cameras) to improve monitoring of fishing activity. The aim is digitilisation of fishing activity. This needs: to be carefully planned; to use the right vessels; adopt the right framework for analysis; and engage the fishers.

#### Discussion

**Q. Different audience will have different data needs. What benefits are there re assurance and access to market?**

**A.** We want to set up pilot projects with aims and objectives incorporated. How we share the information and give the fishing industry ownership has to be considered. We need good evaluation processes in place. We need to be clear on which fleets and gear types can take REM onboard. The key word is assurance. We need to be able to validate fishing data.

**Fishing Innovation Scotland (FIS) pilot digitalisation project re Rockall haddock and Nephrops.** Frank Fleming, Verifact.

#### Discussion

- **Q. Does this fit with the digitalisation of exports that the Government is pushing?**  
**A.** There is appetite to potentially share the information put into legal documents.
- **Q. Do companies own their own data?**  
**A.** Yes but it could be shared on an aggregated basis through a series of user agreements.
- **Q. Are you finding gaps in the data?**  
**A.** Companies do have good internal systems but further down the supply chain it is not really integrated, and the gaps are not the same in each company.

**FIS Vessels of the future project to address barriers to fuel efficiency and support Net Zero.** Kara Brydson, FIS.

**UK Seafood Fund.** Abby Johns and Jessica Saunders, Defra.

- The fourth and final round of the Fisheries Industry Science Partnerships (FISP) scheme, part of Defra's £100 million UK Seafood Fund, was due to open for applications in December.
- The Seafood Innovation Fund was due to open for applications on 14 September, but this has been delayed.
- Infrastructure Fund is due to open in the autumn.

#### Discussion

- There is a lot of interest and no shortage of applications. The biggest barrier is match funding.
- There have been comments that the actual application process was tough, and that this could be simplified.

**Marine Stewardship Council Sustainable Seafood Week.** Giles Bones and Loren Hiller, MSC.