

Attendees

James Wilson (JW)	Chair
Sara Barrento (SB)	Centre for Sustainable Aquatic Research (CSAR)
Paul Howes (PH)	Centre for Sustainable Aquatic Research (CSAR)
Matt Whittles (MWhit)	DEFRA
Moritz Weber (MWeb)	DEFRA
Nick O'Sullivan (NO)	Wales Marine Fisheries Advisory Group
Caroline Dawson (CD)	Menter a Busnes / Welsh Seafood Cluster
Sian Davies (SD)	Welsh Seafood Cluster
Emma Wootton (EW)	Welsh Seafood Cluster
Jon Parker (JP)	CamNesa
Lewis LeVay (LL)	Bangor University
Bethan Jones (BJ)	Welsh Government
Alison Kitchener (AK)	Welsh Government
Rob Floyd (RF)	Welsh Government
Greg Phillpot (GP)	Welsh Seafish Training Association
Jim Evans (JE)	Welsh Fishermen's Association
John Penaluna (JPen)	Penaluna's Famous Fish and Chips
Carol Evans (CE)	Welsh Fishermen's Association

Seafish Staff

Debbie Cook (DC)	Seafish
Aoife Martin (AM)	Seafish
Malcolm Large (ML)	Seafish
Holly Whiteley (HW)	Seafish
Lee Haigh (LH)	Seafish
Phillip Quirie (PQ)(Minutes)	Seafish

1. Welcome and apologies

JW welcomed everyone and asked attendees to introduce themselves. Apologies were received from Richard Williams (WM Shellfish), Trevor Jones (Bangor Mussels), and Wayne Jones (Mermaid Seafoods).

2. Review of previous minutes and matters arising

JW noted the lengthy interim period since the previous meeting, and HW confirmed completion of all action points from the minutes. The minutes were accepted as an accurate record of the meeting.

ACTION 01: Seafish to upload approved minutes to the SWAC section of the Seafish website.

3. Wales Seafood Strategy delivery

HW took the opportunity to provide a brief background to the strategy, explaining the aim to develop the market for Welsh seafood domestically and internationally through direct product marketing as well as provision of marketing support to industry.

3.1 Welsh Seafood Market Development project update

CD referred to paper 2, and provided an update on key project activity to date:

- Three project staff now in place and communicating with industry;
- Establishment of FLAG networking meetings;

- Launch of seafood festival support – application process is now in place to receive funding;
- Hong Kong trade mission to identify export opportunities.

CD then outlined the proposed activity for September 2018 to March 2019:

- Establish an Industry Project Steering Group;
- Industry surgeries and key port visits;
- Establish social media platform for communication with industry;
- Develop a diagnostic toolkit, empowering businesses to maximise their development;
- Develop brand values for local seafood;
- Explore London markets;
- Welsh seafood presence at UK Seafood Summit in October;
- Prepare for Shellfish Week (1-8 March 2019);
- Plan a 2019 Welsh Seafood Conference;
- Deliver industry ‘winter workshops’ focusing on SALSA, HACCP, marketing, product development;
- RFS pilot study.

A brief discussion about brand values and project steering group membership took place, with CD hoping to attract at least one representative from the following sectors of the Welsh seafood supply chain:

- Catching
- Aquaculture
- Processing
- Merchants
- Wholesale
- Retail
- Food service
- Exporting

Due to EMFF backing, the project cannot be branded with the term ‘Wales’ or ‘Welsh’, which sparked a wider discussion about brand values, USPs, and how the steering group will act as a subgroup of SWAC and ought to be established as soon as possible. It was agreed that a brand development agency should be involved, with SWAC being updated via interim emails between meetings.

3.2 Welsh Fishermen’s Association update

JE briefly described the primary projects being undertaken by the WFA at the moment:

- Pre-assessment of commercially important Welsh stocks in preparation for MSC assessment and certification;
- Template for Fisheries Improvement Programme;
- Habitat distribution assessments in conjunction with Natural Resources Wales, using sonar and site-scanning techniques to locate habitats, map their features, and identify the type of fishing activity at each location – feeding into effective management.

Formal EMFF funding letters have been received, and these projects are now gaining traction.

3.3 CSAR update

PH gave a PowerPoint presentation, updating the committee on four key projects CSAR are focusing on:

- SMARTAQUA – a project targeting non-food aquaculture with four aims:
 1. Optimising cleaner fish production.
 2. Fish for medical research and the aquarium trade.
 3. Algal-based aquafeeds and nutraceuticals.

4. Development of a Smart Specialisation cluster for capacity building and business diversification.
- STREAM – established as a direct response to the stated needs of the Atlantic Area Strategy, the Water Framework Directive, the Marine Strategy Framework Directive, and the Shellfish Water Directive. The aim is create advanced marine monitoring systems to understand climate change in the Irish Sea, and develop new instruments and platforms for cross-border marine observation.
 - ALG-AD – an Interreg NWE-funded project in which new technology is being developed to take excess waste nutrients produced from anaerobic digestion of food and farm waste to cultivate algal biomass for animal feed and other products of value.
 - PhycoPigment – a collaboration of academics and industry in UK and Mexico, aiming to develop novel production-process technologies for high value protein-based pigments from microalgae.

3.4 Bangor University Fisheries & Aquaculture Science update

LL briefly introduced the Centre of Applied Marine Sciences, with around half their resources focused on marine renewable energy and the other half focused on fisheries and aquaculture. He took the opportunity to describe the new Shellfish Centre, which aims to increase the successful translation of research and innovation processes into new and improved commercial products, processes and services. LL outlined the target sectors:

- Shellfish aquaculture producers;
- Bivalve shellfish processors;
- New and emerging shellfish aquaculture and fisheries sectors;
- Shellfish-related coastal/marine goods and services companies.

Other relevant areas of research:

- Irish Sea Portal Pilot – a cross-border programme investing in the overall economic, environmental, and social well-being of Ireland and Wales.
- Bluefish project – another Ireland and Wales collaboration with a focus on climate change and adaptive measures.
- Interreg cockles project – designed to further understand distribution and conditions of cockle-growth around the Welsh coast.
- Opportunities for offshore shellfish aquaculture – focusing on physical and ecosystem modelling; area selection; nutrients and primary production; and technology and production trails.
- Sustainable Fisheries for Wales project – fisheries science to support policy and management.

3.5 Welsh Government update

BJ provided a short update, outlining the current areas of focus for Welsh Government:

- 48 EMFF applications have been received, requesting an aggregate of £15.1m – 20 of these applications have been approved, and the backlog is being addressed;
- Fisheries business development advising scheme – project beginning to move forward and applications welcome from SMEs;
- Assessing economic performance and evaluating potential Welsh attendance at Seafood Expo Global 2019 in Brussels;
- Re-establishment of Aquaculture Advisory Group;
- Valuation of EMFF applications in Wales in preparation for Brexit;
- Joint-funded the Welsh grant-aided PFD with PLB project along with Seafarers UK;
- Assessing sector readiness for the exit from the EU;
- Mapping the route of Welsh seafood into export markets, with guidance to be produced once research is completed – this will also feed in to sector readiness work.

A discussion about Welsh FLAGs took place, with JP expressing concern over the apparent lack of activity of the Pembrokeshire FLAG. BJ confirmed the groups have been established, and the first meetings are due to take place over the next weeks. Concern was also raised about Welsh Government's Sustainability Risk Assessment review, as the results will be unavailable until the end of October.

3.6 Welsh Seafood Cluster update

CD set the scene by explaining the Welsh Seafood Cluster was established by Food & Drink Wales, and sits alongside a variety of other clusters such as fine foods, honey, exports, and the aim is for each cluster to work with its respective industry to identify and solve common issues and problems, as well as actively promote Welsh product. This is a pilot scheme established by Welsh Government with £20k per year allocated to cluster activity, and since the last meeting SD and EW have been appointed, working 50% on cluster activity and 50% on the seafood marketing project.

SD then provided a quick overview on some of the cluster focus areas:

- Developing sustainable seafood packaging;
- Skills and training – arranging training events, presence at local colleges, and arranging 'seafood surgeries';
- Attendance at seafood expos, events, and festivals to promote Welsh product;
- Establishment of Seaweed Cluster – helping to develop a growing sector;
- Women in Fisheries – potentially establishing a dedicated cluster or interest group.

3.7 Welsh Fishing Safety Committee update

GP started with a brief background to this new group, which was established after the Welsh fishing industry experienced 19 deaths in 14 years, and consists mainly of volunteer representatives from each catching sector associations.

Falling over the side and drowning is the primary hazard to fishermen, which led to the grant-aided PFD with PLB project, funded by Seafarers UK and Welsh Government, and managed by Seafish on behalf of the WFSC. This initiative offers all commercial Welsh-registered vessels the opportunity to purchase the PFD-PLB at the heavily reduced rate of £15.00 each. GP described the items and how they are worn and operated. Over 540 PFDs with PLBs have been distributed so far, and feedback from fishermen has been entirely positive. The final batch of PFDs with PLBs will be delivered in early 2019, covering nearly 100% of the active Welsh fleet.

The next project will focus on man overboard ladders.

3.8 Wales Fishing Safety Awareness project update

LH introduced himself as the Wales Fishing Safety Officer, and has already met around 80% of Welsh-registered vessel owners as part of the role. His primary focus areas are:

- Risk assessments and prevention, with a particular interest in man overboard prevention and recovery;
- Assisting development of man overboard recovery ladders;
- Wales Fishing Safety Week – a series of events to promote safety awareness, coinciding with Maritime Safety Week;
- Managing content on the WFSC Facebook page – platform for direct communication with fishermen and their families, continuing the safety message.

BREAK

4. Fisheries White Paper

MWeb gave a PowerPoint presentation on the White Paper, which is a type of manifesto and focuses on six key areas, stating:

1. Future access to waters and fishing opportunities

- When we leave the EU, we will take back control of who has access to our waters, and on what terms;
- We expect the UK 6-12 zone to be predominantly for the UK fleet;
- We will negotiate access and fishing opportunities with our European neighbours on an annual basis;
- We will be seeking to move away from relative stability towards a fairer and more scientific method for future quota shares;
- We do not yet know the outcome of the UK's negotiations to withdraw from the EU, or the nature of our future economic partnership;
- The white paper is clear that market access for fisheries products is separate to the question of fishing opportunities and access to waters.

2. Devolution and UK frameworks

- Fisheries is devolved, and the UK government is committed to respecting the devolution settlements;
- The UK government will continue to work with the Devolved Administrations to develop a new UK framework for fisheries management, which will maximise their power to manage their fisheries while maintaining the overall coherence UK fisheries policy;
- Our approach will benefit the whole of the UK, while reflecting the individual needs of the fishing industry in England, Scotland, Wales and Northern Ireland;
- Particular attention will also be given to maintain cross-border co-operation between Northern Ireland and Ireland.

3. Reforms to fisheries management

In England, we will take an evidence based approach to reform which considers the safety implications and where we work closely with industry and stakeholders. Our reform proposals include:

- Developing a tailored package of measures to prevent wasteful discarding including a new approach to tackling 'choke species';
- Reviewing the current "under 10" category of low impact inshore vessels;
- Considering a targeted scientific trial of the 'effort system' for quota management;
- Developing a more effective approach to managing non-quota stocks including in the Western Waters;
- Considering the integration of recreational angling into the new fisheries framework;
- Greater use of technology to support data collection and transparency.

4. Commitment to sustainability

- We will continue to fish within sustainable limits (maximum sustainable yield) to restore stocks to healthy levels;
- We will publish an annual statement setting out the health of fish stocks based on the latest scientific evidence;
- We will continue to work towards ending the wasteful practice of fish discards and comply with the landing obligation;
- We will make clear that vessels will only be allowed to fish in our waters if they adhere to our high sustainability standards;
- As set out in its 25 Year Environment Plan, the government will pursue an ecosystem approach to fisheries management that will minimise impacts of fishing on the wider marine environment.

5. Fisheries Bill

We propose the Bill will include provisions that will allow us to:

- take back control of access to our fishing waters;
- preserve equal access for UK vessels throughout UK waters;
- set fishing opportunities;
- ensure we can protect the marine environment and embed sustainability at the heart of our policies;
- amend retained EU law;
- modernise the MMO's cost recovery powers;
- set up a scheme to tender English quota;
- modernise grant-making powers in England.

6. Future fisheries funding

- We are considering whether and how to replace the EMFF;
- We are proposing in the Fisheries Bill, a power to replace, modernise and broaden the existing grant-making powers in the Fisheries Act 1981;
- The government's 2017 manifesto committed to establish a United Kingdom Shared Prosperity Fund;
- Also available to support fishing communities is the Coastal Communities Fund (CCF).

MWeb then asked the committee to encourage their members to engage with the White Paper and provide feedback.

MWhit is involved in post-Brexit trade work DEFRA are currently undertaking, and also sits on the fisheries negotiations with the EU. He briefly described the four main strands to the current trade work:

1. Future relationship with the EU – negotiating future fisheries deal.
2. Transitioning of EU trade agreements to the UK for trade with Iceland, Norway, South Korea, Canada, and Japan.
3. Exploring free trade opportunities with USA, Australia, and New Zealand.
4. Imports into the UK and what control measures the UK can exert.

A wider discussion then took place, revealing several primary concerns:

- The lack of detail contained within the paper – it seems more like a manifesto rather than a paper of guarantees;
- The 'Shared Prosperity Fund' will ultimately be in the hands of the UK Treasury, which is not devolved, and there will be heavy UK-wide demand on the fund;
- Welsh vessels not receiving enough quota allocation – currently one particular Belgian-registered vessel owns greater quota than the entire Welsh fleet aggregated;
- The risk of open access to UK waters is still a legitimate fear.

5. General Updates

Welsh Government Brexit update

RF provided a brief verbal update on Brexit work being undertaken. RF apologised for not having a written update paper available for the meeting, explaining that there was a lot of work happening behind the scenes, much of which Welsh Government were not yet in a position to communicate. A comprehensive written update would be provided in due course.

General Seafish update

ML and HW provided a brief update on wider Seafish work across the UK, focusing on those projects and outputs with particular relevance to Wales. HW informed SWAC members that Seafish's national Seafood Week was taking place 5th to 12th October this year and a number of marketing and promotion activities

were taking place, including a bus advertising campaign in Cardiff and other key cities across the UK. HW introduced SWAC members to the new Seafood Week branding and signposted where to access resources.

General Seafish Wales update

HW highlighted the written Seafish Wales Update providing in the meeting papers. Due to time constraints HW focused her update on the development of the online Wales Seafood Industry Dashboard, which she presented and demonstrated to SWAC members. The draft Dashboard was positively received by SWAC members and HW informed the Committee that the Dashboard will be available for user testing in the coming months.

6. Review actions and confirm date of next meeting

Previous actions were reviewed as completed in agenda item 2. The next meeting will take place in Spring 2019, and Seafish will circulate a poll to establish a date.

ACTION 02: Seafish to circulate an online doodlepoll to establish date of next meeting.

7. Any other business

The presentation of the Dashboard stimulated a discussion around the availability of information about the Welsh seafood industry and, in particular, the lack of information about the merchants / exporters currently operating in Wales and exporting Welsh seafood products. HW informed the Committee that she would enquire about the possibility of extending the current biannual Seafish Processing Sector Census (due to start November 2018) to include Welsh exporters, in order to gather key information about this sector.

This was particularly welcomed by the Committee as members highlighted that the merchants / exporters in Wales will be the first businesses impacted by EU Exit, which will in turn impact the Welsh fishing fleet. Therefore increasing the understanding of this small but key sector in Wales is essential for better understanding and preparing for the impact of Brexit.

Action Summary	Assigned to	Timeframe
01: Seafish to upload approved minutes to the SWAC section of the Seafish website.	PQ	31.12.2018
02: Seafish to circulate an online doodlepoll to establish date of next meeting.	HW	24.10.2018