Annual Plan 2018 / 2019

Setting the scene

Our Corporate Plan (CP) is focused on helping the UK seafood sector to thrive; by working in partnership with seafood businesses right across the supply chain, Seafish will help the sector to successfully respond to a series of complex challenges that could prevent it from reaching its potential.¹

In collaboration with the UK seafood sector we have identified the following five key challenges:

Challenge 1: A changing political, economic and regulatory landscape as the UK exits from the EU

The seafood industry is facing unprecedented change as the UK exits the European Union (EU). Shifting dynamics in the overall UK business climate are likely to significantly affect seafood businesses in both positive and negative ways. Changes in the fisheries management framework will influence future access to the resource, industry-science cooperation and how environmental objectives are achieved. Leaving the EU could alter existing seafood tariff arrangements and non-tariff barriers, impacting both imports and exports. Businesses will also face increased uncertainty of workforce supply with expected changes to EU migration arrangements. Finally, existing programmes of EU funding currently accessed by industry and researchers will no longer be available.

Challenge 2: Stagnant consumer demand and strong competition from other protein and non-protein foods

Although seafood is widely recognised as one of our healthiest and most sustainable protein foods, we are falling far short of the UK Government’s consumption target of two portions per person a week. The sector is not fully capitalising on seafood’s unique selling points and is being directly challenged by growing competition from other sectors for a share of the protein market. Key to increasing seafood consumption is meeting consumer requirements in terms of product quality, taste, freshness, price and consistency. The ability of seafood businesses to meet consumer preferences around convenience and availability, to capitalise on the health credentials of seafood, and to ensure that food safety and product integrity are not compromised is also important. Seafood is also subject to a shifting industry image, influenced by media messaging and campaigning by Non-Government Organisations (NGOs), celebrities and journalists, which ultimately has an influence on consumer choice.

¹ The UK Seafood Sector includes all seafood landed or imported into the UK, all seafood consumed in the UK, and all seafood exported from the UK.
Introduction

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

The ability to achieve a thriving seafood supply chain is affected by workforce availability and capability. In common with other food production sectors, the industry is constrained by the available workforce across the UK, as well as by the potential for restricted access to overseas labour resources in the future. The sector has to contend with difficult working environments and at times dangerous practices, particularly at sea, which can result in lives being lost. Concerns about unethical production practices have the capacity to tarnish the reputation of the sector and the sector needs to proactively demonstrate that it is dealing with concerns about poor working conditions, subsistence pay and forced labour, so that it can become an industry that people want to work for. These issues are increasingly played out amidst the trade-off between restrictions around labour availability and advances in technology.

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

Global population growth and increased demand for protein, coupled with limitations in wild capture volumes are tightening supply conditions for the UK seafood sector. The ability of seafood businesses to respond to these supply constraints is shaped by consumer preferences, pricing and sustainability criteria. Also of increasing importance is the ability of other countries, with growing affluence, to secure the seafood resource for themselves through active food security strategies. At the same time, the seafood industry must ensure that it retains and builds upon its hard earned advances in responsible sourcing; such as buyers’ sustainability specifications, eradicating Illegal, Unreported and Unregulated (IUU) fish, adherence to seafood certification schemes and ensuring an ethical and transparent supply chain.

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

The challenges facing the sector are amplified by limitations in the availability of data, information, and evidence to support seafood businesses to understand and respond to changes in the wider operating context.
What can Seafish offer?

At Seafish, we are committed to work in partnership with our stakeholders to make a difference on the issues and challenges that matter most. Our three industry sector panels have set out their priorities. They have identified the key challenges that their organisations are facing. They have asked Seafish to do what it does best and help show everyone that seafood is the way forward. This is our purpose as an organisation.

We know that seafood is the way forward for business, the way forward for our communities, the way forward for the environment and the way forward for our personal health and wellbeing. This Annual Plan will help us deliver against our rallying cry, ‘Seafood is the way forward’. The aim is to unite the industry behind a common purpose and build a common voice. So whatever challenges are faced across trading, safety and skills, consumption or sustainability, our vision of a truly thriving seafood industry will be realised.

We know that we can’t drive the transformation to a thriving seafood industry on our own – collaboration is critical and partnership is at the very heart of our delivery. More than most we understand that the seafood sector is complex and its needs are not uniform. They can vary by business size, business type and by location. This influences how different businesses and different parts of the sector choose to engage with Seafish. Some seafood businesses are satisfied to simply access our information when they need it; they rarely engage proactively with Seafish and are content to rely on our web-based content. In contrast other parts of the sector choose to work in partnership with Seafish to respond to issues, to ensure our information is tailored to their specific needs, and to shape and influence how Seafish can support the sector.

Our preference is to improve awareness of the support that Seafish can provide to the sector and to ensure that all seafood businesses have the opportunity to proactively engage with Seafish on the issues that matter.

As important, is our commitment to increase collaboration and engagement:

- Amongst seafood businesses, so that the sector is positioned to successfully compete with other protein providers, rather than within itself.
- Between the seafood sector, government, NGOs and the wider public so that consumers can have confidence in seafood as a healthy, nutritious food source, and in the supply chain that produced it.
- With other food manufacturing sectors and organisations because the challenges the UK seafood sector faces, particularly created by the UK’s exit from the EU, are not unique to the seafood sector. There will be opportunities to learn from other sectors and to form mutually beneficial partnerships.

To succeed Seafish needs to be open, agile and responsive, and our work programme for 2018 to 2019 reflects this. Not all activities will be completed during the twelve month period of this Annual Plan.

- **Activities marked ***
  will start during 2018 but will be finalised from 2019 onwards.

- **Activities marked ~**
  are core work projects that will be delivered each year of the Corporate Plan e.g. providing economic advice or delivering the Risk Assessment for Sourcing Seafood.
Challenge 1:
The changing political climate as we exit from the EU
Challenge 1: The changing political climate as we exit from the EU

Seafish is focused on helping our seafood sector identify, optimise and secure business benefits from the process of the UK’s exit from the EU, while successfully responding to the difficulties that such change will inevitably bring. To succeed, Seafish and our four government partners will need to work in close collaboration. Our programme of work during 2018/19 to support this challenge will include:

Key area 1: Governance and Marine Management

A. Facilitate regional and home nation engagement on the impact of the UK exit from the EU through tailored sessions at our advisory committees on changes to the fisheries management regime.

B. Ongoing research and analysis on specific issues relating to the UK exit of the EU such as strategic or economic impacts of proposed new management rules e.g. the impact of EU exit on the under 10m vessel/inshore sector, and the impact of changes to the fisheries management regime to operators in the sector.

C. Assess the current and potential seafood resource available within the UK Exclusive Economic Zone (EEZ), to establish the contribution that seafood makes through the supply chain so as to determine the contribution seafood makes as part of the wider UK and global marine resource.

D. Working collaboratively with industry, government and the environmental NGO community to ensure that decisions to protect the marine environment (such as Marine Protected Areas, Marine Conservation Zones and Sites of Special Scientific Interest) are made with a full understanding of the potential impacts on the seafood sector. This should help ensure that selected sites provide the required environmental protection and have the least impact on the seafood sector.

Key area 2: Seafood Markets and Trade

A. Act as a liaison between government and the seafood sector on trade related EU exit issues through our participation in cross-government forums discussing regulatory requirements and transition issues that will impact on the seafood sector (e.g. Joint Customs Consultative Committee Sub Group) and by providing regular updates to seafood businesses.

B. Provide information and support to facilitate the development of proportionate trade regulations and procedures for the seafood sector; which will include Seafish facilitating workshops between seafood importers, exporters and government seafood specialists to discuss trade issues.

Note that this activity and activity KA2 (d), under Challenge 1 will be delivered primarily in response to industry requests for assistance or advice.
Key area 2: Seafood Markets and Trade continued

C. Provide practical advice to the seafood sector on changing import/export procedures including:
   i. Providing easily accessible tariff guidance information for seafood businesses. (Fiona)
   ii. Assessing the impact of non-tariff barriers on the sector.
   iii. Developing a trade and tariff tool that will enable seafood businesses to access UK trade and tariff data at product and country level. NEW

D. Undertake periodic reviews of the implications for the seafood industry of likely EU exit trade scenarios to identify key areas of exposure and their wider implications.

E. Arrange ‘Seafood from Britain’ pavilions and trade stands at agreed international seafood expos and facilitate UK companies’ attendance at these shows so that they have the opportunity to engage directly with existing customers and potential importers. As part of this activity Seafish will also explore opportunities to attend SIAL (International Food Exhibition, Paris) and ANUGA (Food and Beverage Trade Fair in Germany).

F. Produce export focused market insight information to support UK businesses to trade in new markets including updating existing Seafish export guides focused on non-EU markets.

Key area 3: Seafood Regulations and Standards

A. Assist the sector as it transitions from EU law to a new domestic legislative regime by identifying areas of regulation that may need amending in the transition phase, so as to ensure that the impacts of changes to legislative requirements are minimised.

B. Support the sector to meet regulatory import and export requirements, and to achieve compliance with product standards, in new markets.

C. Identify areas of regulatory divergence that may impact on seafood trade and work with relevant authorities to address ways to remove this divergence.

Key area 4: Labour Requirements

A. Deliver economic analysis and reports on labour issues within the seafood processing and catching sectors across the UK to inform EU exit-related policy decisions.

B. Support the seafood sector to respond to a changing labour environment by providing independent information and analysis on the impact of labour availability issues across the seafood sector e.g. sourcing processing staff and vessel crew from outside the UK.

Key area 5: Accessing Public Funding

A. As the availability of public funding to support the seafood industry changes in response to EU exit, assess how this change will impact on the sector and how industry can best respond, for example by demonstrating a range of public good benefits that arise from the sector’s sustainable management of the marine resource. * NEW
Challenge 2:

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

Our goal is to facilitate 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 across the UK. Inherent to this challenge will be ensuring that this increased consumption is achieved in line with wider sustainability and resource management objectives.

We will work with seafood businesses, and consumers, to encourage more people to eat more fish more often. Our programme of work during 2018/19 to support this challenge will include:

**Key area 1: Defining and validating universally agreed messaging to ensure seafood’s Unique Selling Points (USPs) are consistently and widely shared**

A Facilitate a Marketing Expert Group of senior industry representatives to develop, support and share consistent consumer messaging across the supply chain.

**Key area 2: Devising and delivering consumer campaigns of value to the whole sector**

A Develop and deliver targeted marketing campaigns to promote the variety of seafood and to encourage more people to eat more seafood more often. These will include Seafood Week, a sustained and integrated ‘2 a week’ health campaign targeting both the pre family and over 65s age group, developing our online ‘Fish is the Dish’ hub, and partnering with a high profile ambassador to help grow consumer awareness and consumption.

**Key area 3: Amplifying our ‘2 a week’ messaging via our trade stakeholders**

A Deliver an insight-led food service and retail focused Seafood Week campaign that aims to increase sales growth and works towards the ‘2 a week’ target.

B Work with the fish and chip shop sector to continue promoting fish and chips as the best take away option; activities include the annual ‘National Fish & Chip Awards’ and supporting ‘National Fish and Chip Day’, and developing trade messaging on key sector issues such as creating customer choice and nutritional composition.

C Develop brand neutral campaign assets (photographs, recipes, social media guides) for use by the whole supply chain. This will include campaign toolkits for fishmongers, fish and chip shop operators and other key segments of the retail and food service sectors.
Key area 4: Educating and upskilling partners on the key USPs of seafood

A. Build campaigns to promote seafood as a smart protein choice, focusing on topics such as health benefits and the environment and increasing consumption beyond the ‘big five’ (salmon, tuna, prawns, cod and haddock). This will include a range of initiatives such as:
   i. Supporting chef training by running the Young Seafood Chef of the Year Competition and developing a new ‘sea to serve’ training portal;
   ii. Partnering with Billingsgate Seafood School, and other similar institutions to educate and upskill industry and consumers alike.

B. Deliver initiatives, such as a Seafish Ambassadors’ Programme to create a network of experts who will educate and upskill the trade on the value and importance of seafood.

Key area 5: Ensure the seafood sector is positioned to take advantage of the increased demand generated by our consumer promotion campaigns

A. Provide seafood specific regulatory guidance on food safety matters to help industry to comply and to reduce the cost of compliance to. This will include guidance on protected designation trademarks, health and nutrition claims and the application of advertising codes.

B. Produce detailed generic and bespoke market insight information, covering retail sales and foodservice channels, to enable the seafood sector to anticipate or respond to consumer trends.

C. Engage collaboratively with the seafood sector to identify opportunities for new product innovation to ensure seafood can compete successfully with other innovative protein products (such as pulled pork, smoked salmon sandwich slices and protein drinks). During the next twelve months we will develop a road map setting out the key activities which will include initiatives to encourage the sector to engage in new product development, including guidance and expertise on establishing new products and their route to market. Specific activities will be progressed from 2019.* NEW

D. Explore how the science (algorithms) and psychology (targeted advertising) of online retailing can impact the promotion and purchase of seafood, so businesses can take advantage of these initiatives to encourage increased consumption.* NEW
Challenge 3:

Attracting, retaining and developing sufficient skilled labour while providing a safe working environment
Challenge 3: Attracting, retaining and developing sufficient skilled labour while providing a safe working environment

Our goal is to support efforts to 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. Our programme of work during 2018/19 to support this challenge will include:

Key area 1: Supporting the seafood sector to source sufficient skilled labour to meet business demands

To be progressed under Challenge 1 during 2018/2019.

Key area 2: Establishing the seafood sector as an employer of choice

A Support a network of Seafish-recognised apprenticeship providers and work with them to deliver employer workshops, and engage with individual employers to deliver apprenticeships across the UK.~ NEW

B Develop a coordinated and informed campaign(s) to establish the seafood industry as a career focused sector and an employer of choice; targeted at school leavers, students seeking seasonal work, people returning to the work force. Including:

- Working in partnership with the careers industry (job centres, recruitment agencies and direct outreach to job seekers) to promote opportunities.
- Developing assets for seafood business to help promote career and employment opportunities in their own businesses.

Related to this is the need to focus on 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 Establish, in collaboration with the large scale processing sector, a ‘Future Leadership Programme’ to attract talented managers and leaders to work in the sector. NEW

Key area 3: Supporting the sector to create a safe working environment for all staff across the supply chain; from fishing vessels to fish processing factories to retail outlets

A Deliver a range of marine survey services to the sector to ensure vessel safety, including:

- Surveying and certifying fishing vessels built to Seafish construction standards to provide safe working environments for fishermen.
- Providing advice to fishermen, boat builders and government partners on best practice in fishing vessel design and construction.
Key area 3: Supporting the sector to create a safe working environment for all staff across the supply chain; from fishing vessels to fish processing factories to retail outlets continued

- **B** Maintain, update and develop Seafish’s fishing vessel construction standards and associated documents in response to changing legislation and government guidance, including changes arising from the introduction of the ILO C188 Work in Fishing Convention.

- **C** Produce information and guidance material (e.g. Fishsafe) that contains details of at sea hazards from the offshore oil and gas, subsea cable, and renewable energy sectors, to improve safety awareness amongst fishing vessel crew and to prevent accidents.

- **D** Assess and develop material to embed Kingfisher Offshore Awareness training material into fishing and crew training courses.

- **E** Collaborate with our partners in the Fishing Industry Safety Group to deliver continued improvements in fishing safety by supporting delivery of the Fishing Industry Safety Group 10-Year Strategy to Eliminate Preventable Deaths in the UK Fishing Industry.

Key area 4: Delivering sector-led training, in collaboration with our training partners, to enable industry to access appropriately skilled labour and build capability

- **A** Provide effective administrative support to Approved Training Providers (ATPs) to deliver offshore and onshore training programmes; including managing funding eligibility, maintaining training records, and providing general advice and guidance on training issues.

- **B** Develop new (and update existing) training course material in response to identified industry needs and to reflect the latest developments in safety and best practice. This will include (1) a targeted training programme to deliver the basic pre-sea safety training required under STCW-F and (2) revisions to bivalve depuration training for Environmental Health Officers to incorporate the latest approaches to Official Control Verification.

- **C** Support, promote and encourage the take-up of mandatory and voluntary training by (1) fishermen working on UK-registered commercial fishing vessels and (2) employees in the UK onshore seafood sector.

- **D** Provide quality assurance guidance and support to our UK-wide network of ATPs to ensure that it is delivering training courses in accordance with Seafish requirements and the needs of the sector.

- **E** Progress the development and implementation of a new fisheries training database system to provide an online self-service facility for (1) fishermen to access their training records, and in time a wider suite of crew information and (2) recipients of Seafish-facilitated onshore training programmes. NEW
Key area 5: Supporting the sector to explore the trade-offs between new technology, mechanisation and traditional labour resourcing

Explore how mechanisation is being used both as a substitute for labour in seafood businesses and as a means to increase the productivity of existing labour forces, to:

i. Identify implications, opportunities and threats for the UK industry; and
ii. Use the findings to undertake a comparative study with part of the UK sector.* NEW
Challenge 4:

Balancing the need to secure sustainable supply while ensuring we meet consumer demands for supply chain integrity
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. Seafish considers that a sustainable and responsible seafood sector is the minimum standard that all parts of the supply chain should adhere to. Our programme of work during 2018/19 to support this challenge will include:

Key area 1: Supporting growth in aquaculture as a key source of supply

A. Support initiatives to assist the sector achieve sustainable growth through knowledge sharing and effective collaboration between key stakeholder groups.

B. Provide the UK aquaculture sector with information and guidance on interpreting and adhering to aquaculture regulations, identifying regulatory challenges that may limit sector growth and working collaboratively with industry and government to respond to these issues; such as improvements to water quality through the implementation of EU water quality directives.

C. Provide accurate and accessible information on aquaculture practices to promote public awareness and to inform consumer choice.

Key area 2: Working collaboratively on initiatives to address supply constraints

A. Gathering and sharing expertise to enable the catching sector to improve understanding of gear selectivity in wild capture fisheries to address bycatch issues.

B. Progress initiatives to improve the knowledge base of key data deficient fisheries to enable these species to become a credible part of the supply chain.*

C. Assist the sector to source and secure supply from outside the UK by facilitating the Seafood Importer’s Forum, and supporting its members to address issues and obstacles to trade.~

D. Assess the opportunities and threats to UK imports of seafood over the medium to long-term; including comparing the volume of imports the UK has access to as a proportion of total production in the country of origin, and the likely sources of competition for this supply. * NEW

E. Disseminate, test and improve the Best Practice Guidance on how to assess the economic implications of trial selective fishing gear.
Key area 3: Developing and implementing a range of ‘fit for purpose’ supply chain integrity tools to assist the UK sector to maintain its ‘licence to operate’

A. Maintain and enhance 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.~

B. Maintain and update our online resource Tools for Ethical Seafood Sourcing (TESS), to signpost stakeholders to the wide range of resources available to support incorporating best practice social responsibility in supply chains.~

C. Continue to provide oversight and governance of the Responsible Fishing Scheme (RFS), and support its implementation in the UK. This will include:
   i. Developing Version 2 of the RFS Standard and refreshing associated policies and guidance material.
   ii. Promoting the RFS across the supply chain, both in the UK and beyond.
   iii. Successfully transitioning ownership and management of the standard to the Global Seafood Alliance.*

D. Support the roll out of the Responsible Fishing Ports Scheme standard across large (i.e. those with sales facilities) ports.~

E. Develop a Responsible Fishing Ports standard suitable for small ports.*

F. Review and refocus our current tools and guidance material on responsible sourcing, to establish a ‘one stop shop’ approach so that our information on supply chain and product integrity is cohesive, easy to navigate and accessible to all.

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3 Large fishing ports are classed as ports with sales facilities.
Key area 4: Supporting the seafood sector to respond to issues relating to supply chain integrity to maintain the reputation of the seafood industry

A Facilitate the Seafish Issues Groups, in partnership with seafood stakeholders, to support responsible sourcing and supply chain integrity.

B Provide information on the high-level social risk landscape for key countries supplying the UK seafood market.

C Support the seafood sector to respond to issues associated with marine plastics in the supply chain by (1) ensuring up-to-date and relevant information on the issue is available, (2) signposting the sector to initiatives that support improved management and mitigation of the issue, and (3) working in collaboration with the sector to provide accessible and up-to-date consumer information.

D Monitor the findings of third party risk assessment tools focused on ethical and human rights issues, to enable the seafood sector to respond to the identified risks, and where appropriate, assist the tool holder to improve the quality of the source information used. NEW

E Produce practical information and guidance on ensuring awareness across the seafood supply chain on how to meet the requirements of the Modern Slavery Act.

F Provide regular updates on food safety integrity issues affecting the sector and work collaboratively with agencies to uncover fraudulent activity that might compromise consumer confidence in seafood products.

G Collaborate with industry, government and other stakeholders to develop ‘information lead’ tools to ensure fish welfare concerns do not compromise the integrity of UK seafood.

H Provide expertise and analysis to help the seafood sector to respond to issues relating to environmental sustainability, by producing briefings and guidance material relating to specific campaigns. Past examples include research on issues relating to ‘microplastics and the seafood industry’ and ‘electrofishing in marine fisheries’.

I Develop a package of product specification templates for use by seafood businesses as a business to business (B2B) tool to help ensure food safety, provenance and legal compliance requirements are clearly understood by suppliers and purchasers alike.
Challenge 5:
Ensuring access to information to drive innovation and growth
Challenge 5

Ensuring access to information 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. Our programme of work during 2018/19 to support this challenge will include:

**Key area 1: Encouraging dialogue on science and innovation across the seafood sector**

- **A** Establish, implement and promote the Seafish Expert Panel to provide expertise to support Seafish project delivery and to assist industry to respond to business issues. NEW

- **B** Conduct research on innovative initiatives relating to waste management in the seafood sector, focusing on case studies from other jurisdictions and from other industries to reduce waste and improve product recovery. The findings from this research will be presented to key stakeholders at a series of seminars and at Seafish committee meetings.* NEW

**Key area 2: Facilitating awareness of emerging issues that may impact on the sector and supporting the sector to respond to these issues, drawing on evidenced based expertise and industry experience**

- **A** Maintain a watching brief across the entire UK seafood industry landscape for ongoing strategic issues (e.g. climate change and food security) for the purpose of mapping the risk landscape and prioritising industry risks.~

- **B** Provide in depth analysis on strategic issues identified through Challenges 1–5, as required.

- **C** Collect industry financial, economic and social data in order to make available robust data sets to support economic analysis, reports and advice. Examples include processing sector and catching sector financial, social and operational data that can be used in impact assessments, valuations or scenario analyses related to the UKs exit from the EU or other proposed changes in regulations.~

- **D** Conduct economic analysis across the seafood supply chain to support decision making both for seafood businesses and for government. Examples include impact assessments of the Landing Obligation requirements and analysis of the UK scallop catching sector.~

- **E** Provide economic advice, answering specific queries, communicating and explaining the meaning and implications of economic evidence and theory to industry, government and other stakeholders, so that evidence can be put in context and advice can be tailored to support specific policy and business challenges.~

- **F** Complete a review of emerging global best practice in gear technology and selectivity to address issues relating to fish welfare and the impact of fishing on endangered, threatened and protected (ETP) species. Share key findings via the Seafish Gear Database and/or the Discard Action Group (DAG).
Key area 2: Facilitating awareness of emerging issues that may impact on the sector and supporting the sector to respond to these issues, drawing on evidenced based expertise and industry experience

G Deliberate innovative mapping products to better inform the fishing industry of ‘at sea’ hazards and spatial restrictions on fishing effort so as to reduce conflict and to improve decision making e.g. Marine Protected Area locations and their impact on fishing activities.* NEW

H Engage with key stakeholders to explore initiatives to improve our understanding of how spatial analysis can contribute to good fisheries management decisions and a profitable seafood sector.* NEW

Key area 3: Cultivating and resourcing innovative solutions

A Deliver innovative products using our market insight information to support the seafood sector to drive increased consumption, and to support progress against Challenges 1-4. This includes developing ‘home nation’ seafood value chains, and a ‘market barometer’ tracking top line market trends.

B Collaborate with Fishing Industry Safety Group partners to trial the application of behavioural insight theory to increase crew uptake and use of personal flotation devices. NEW

C Commence work on the production of a new Total Allowable Catch Atlas to provide accurate and accessible information on catch limits relevant to the UK seafood industry.* NEW

D Work in partnership with industry to facilitate innovative trials of fishing gear (such as the development of the inclined net grid separating nephrops from other fish species to help manage discard rates) to support the development of solutions to overcome key challenges facing the UK fleet such as responding to fish welfare issues and reducing the impact of fishing gear on the environment and ETP species.*
Seafish Engagement & Outreach

Seafish is committed to working collaboratively with our stakeholders to make things happen, to achieve the aspirations set out in our Corporate Plan, and to deliver the activities in this Annual Plan. Enabling the sector to overcome the five key challenges is dependent on how successful we are at ensuring our work programme has a practical application so that it can drive positive change on the ground; on fishing boats, at harbours, in processing businesses, in restaurants and in retail outlets across the UK and beyond. Integral to this is our:

- **A** ‘On the ground’ engagement we provide through our national and regional committees;
- **B** Our work to promote the positive reputation and credibility of the industry;
- **C** Our facilitation of forums for sharing information and ideas;
- **D** Our tailored sector-wider engagement events;
- **E** Our active participation in stakeholder events in the UK and overseas to share best practice and identify opportunities for the UK industry.

**National and Regional Engagement:**

Our success is dependent on our ability to help seafood businesses across the UK to be profitable and sustainable. Central to this is ensuring that businesses are (1) aware of the issues that may impact at a global, national and local level and (2) are able to make an informed response. Our network of national and regional engagement teams work across England, Scotland, Northern Ireland and Wales, in collaboration with established Advisory Committees, to make the connection between national initiatives and their local application.

As well as supporting the delivery of the activities listed under Challenges 1 – 5, our regional and national engagement teams also deliver a range of specific initiatives. These activities are agreed by the members of the relevant Advisory Committee. During 2018/19 activities will include:

- **A** Delivering a programme of local careers events highlighting the diverse range of seafood sector careers opportunities available to school pupils and students.
- **B** Delivering Seafood Week events across the four home nations such as ‘The Loaves and the Fishes’ event in Northern Ireland
- **C** Facilitating Fishermen’s Safety Forums in Northern Ireland and Wales and establish similar forums in the South West of England and Scotland as required.
- **D** Assisting the sector to respond to marine planning changes at a local level so that appropriate protection zones are in place that can deliver environmental outcomes with minimal disruption to the sector e.g. work to determine the optimal location of Marine Conservation Zones in the Irish Sea.
- **E** Supporting a market development project to enhance the profile of Welsh seafood both in domestic and export markets.* NEW
National and Regional Engagement:

continued

F
Supporting the development of a Seafood Trail to coincide with the Welsh ‘Year of the Sea’ initiative. NEW

G
A dedicated processing training programme that successfully combines traineeships, apprenticeships and careers activities in the north east of Scotland. NEW

H
A comparative study of mechanisation amongst small to medium sized processing businesses in the north-east of Scotland and Iceland to identify innovative ideas and potential opportunities for businesses to address labour constraints. NEW

The national and regional teams also have a key role in supporting the delivery of government supported strategies across the four UK administrations:

A
In Wales we are directly involved in implementing the Wales Seafood Strategy which was developed by the Seafish Wales Advisory Committee (SWAC) in collaboration with the Welsh Government. The Strategy outlines the vision for a thriving, vibrant, safe, and sustainable seafood industry for Wales focused on sustainable growth, increased employment, and improved fishing safety.

B
The newly formed Scottish Seafish Advisory Committee (SSAC) will support the delivery of Ambition 2030: A growth strategy for farming, fishing, food and drink focused on assisting the Scottish food sector to reach its £30 billion target by 2030. The SSAC will align its work programme to Ambition 2030.

C
Working as lead partner with the Department for Environment, Food and Rural Affairs (Defra), Seafish is actively involved in delivering Seafood 2040. During 2018/19 we will establish and support the Seafood Industry Leadership Group (SILG), and will progress priority actions detailed in the strategy including improving (1) our understanding of the nutritional benefits of seafood and (2) the status of data deficient stocks in English waters.

D
Seafish is a member of the Northern Ireland Fishing Industry Taskforce and works collaboratively with Department of Agriculture, Environment and Rural Affairs (DAERA) to progress projects to benefit local businesses through the Seafish Northern Ireland Advisory Committee (SNIAC).

Promoting the positive reputation and credibility of the industry:

Seafish has a proactive Comms team focused on sharing the positive work of the industry and coordinating industry responses to the key reputational issues and opportunities across the five corporate challenges. The team also provides media and stakeholders with access to relevant and timely news. Services provided by the Seafish Comms team include:

A
An online media room providing instant access to Seafish news, statements, assets and details of Seafish key contacts on issues.

B
Media training for Seafish staff and stakeholders on key messages, reputational issues and the five core challenges so as to position us and our partners as thought leaders.
Promoting the positive reputation and credibility of the industry: continued

- **C** Monitoring media for potential reputational opportunities and risks, evaluating media sentiment and responding accordingly.

- **D** Producing a variety of engaging content that can be used and shared by the industry.

**Facilitating forums to share information and ideas:**

Our Seafish issues groups, (such as the Common Language Group, Ethics Common Language Group, the Discard Action Group and the Aquaculture Common Issues Group) provide space where key UK-wide issues can be discussed, common understanding achieved, and actions defined. These groups are open to all and provide a platform for the seafood sector to engage more broadly, with universities, research institutes, public bodies and other food industries.

**Tailored engagement events:**

To help us get the message out there about how good seafood is, we will deliver a structured programme of promotional events across the sector:

- **A** Organising and delivering bespoke seafood seminars and workshops such as the annual UK Seafood Summit (formerly the Humber Seafood Summit).

- **B** National Fish & Chip awards and related competitions.

- **C** Promote seafood consumption at consumer facing festivals and shows across the UK (e.g. The Dorset Seafood Festival in the south west of England and the Balmoral Show in Northern Ireland).

**Beyond the UK:**

Although Seafish is focused on the UK seafood sector we know that the sector has a global outlook. We actively take account of this through:

- **A** Our advocacy work to engage stakeholders (in the UK and beyond), to identify and maximise opportunities for collaboration on issues that can impact on or benefit the global seafood sector.

- **B** Our presence in Brussels ensures the sector has an ‘on the ground’ awareness of EU regulatory issues affecting the sector.

- **C** Our work to facilitate import and export trade forums to enable the sector to work collaboratively on issues that can impact on seafood supply and seafood sales.
Enabling Services: Internal functions that support the work we do

Seafish Business Services is responsible for the internal support functions which will 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. Each team has its own primary objectives for 2018/19 which are summarised as follows:

Human Resources: Our Human Resources team is focused on ensuring that Seafish has the right capability within the organisation to help it deliver on its ambitious Corporate Plan. Initiatives that will be progressed during 2018/2019 include:

A. Enabling and facilitating opportunities for staff personal growth and development.
B. Providing a flexible and agile working environment for staff through our Results Only Working Environment (ROWE) initiative.
C. Focusing on staff well-being to ensure the overall Seafish team is able to perform at its best.
D. Managing our resourcing, succession planning and recruitment processes to ensure we continue to attract, recruit and retain the best people at Seafish.

Finance: The Seafish Finance team will continue to deliver effective financial systems, robust internal controls to safeguard Seafish’s 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.

Levy: Our Levy Team is responsible for ensuring the timely and effective collection of the levy. In addition to their traditional levy duties, such as identifying and contacting levy payers and auditing at least 60% of the levy intake during the financial year, our levy auditors will have a key role in communicating the activities outlined in this Annual Plan to the levy payers and businesses that they engage with. During 2018/2019 Seafish will also introduce a new online levy portal to enable levy payers to file their returns more efficiently.

Information Systems (IS): Our IS team is responsible for planning, developing and supporting Seafish’s information systems and technology infrastructure to enable users to deliver the Annual Plan. The team has a key role in:

A. Collaborating with staff to develop and create new systems to support the successful delivery of the activities in the Annual Plan, including a new Fishermen’s Safety Training Database.
B. Ensuring that Seafish’s databases are compliant with the General Data Protection Regulation (GDPR).
C. Enhancing our security systems across all Seafish hardware, laptops, PCs, mobile phones and servers.
Our budget for 2018-2019

To enable Seafish to deliver this Annual Plan the following funding has been allocated to each of the five challenges.

<table>
<thead>
<tr>
<th>BUDGET ALLOCATION PER CHALLENGE</th>
<th>£000's*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Challenge 1: EU Exit</td>
<td>1,206</td>
</tr>
<tr>
<td>Challenge 2: Consumer Demand</td>
<td>3,759</td>
</tr>
<tr>
<td>Challenge 3: Safety &amp; Skills</td>
<td>748</td>
</tr>
<tr>
<td>Challenge 4: Supply &amp; Responsible Sourcing</td>
<td>1,766</td>
</tr>
<tr>
<td>Challenge 5: Knowledge &amp; Insight</td>
<td>1,102</td>
</tr>
<tr>
<td>Total:</td>
<td>8581</td>
</tr>
</tbody>
</table>
Key information

Seafish is a non-departmental public body (NDPB), set up by the Fisheries Act 1981, and is funded by a levy on the first sale of seafood in the UK. We support the £6bn seafood industry from catch to plate providing facts, stats, research and a range of business and industry support tools as well as promoting seafood to consumers.

Our vision is for a thriving UK seafood industry and we believe seafood is the way forward for business, communities, sustainability and for personal health and wellbeing.

Seafish has 86 staff with two thirds working between our offices in Edinburgh and Grimsby. The remaining third is made up of homebased staff, who are spread across the UK, from the north west of Scotland to the south west of England and over to Wales, and Northern Ireland.

Did you know…

- Seafood purchased in the UK in 2017 is up by 4.7% from 2016 and worth £6.61bn
- Over the year ending August 2017 the value of seafood exports from the UK increased to £1.89bn
- In 2016, UK vessels landed seafood into the UK and abroad totalling 701,000 tonnes
- There are 9,468 full time fishermen working on 6,378 UK registered fishing boats
- The total value of landings into the UK increased by 20% in 2016 to £936 million; half of this comes from five species – Nephrops, Mackerel, Scallops, Monkfish with Crab and Hake vying for 5th place
- In July 2017 the iconic North Sea Cod fishery was certified as sustainable by the Marine Stewardship Council
- Traditional fish and chip shops have shown the highest growth in 2017, with servings up 12.2%
- In 2016 there were 376 fish processing businesses in the UK providing a total of 17,999 full-time equivalent (FTE) jobs
- In 2016 seafood imports (including landings by foreign vessels), accounted for approximately 68% of the value and 53% of the total volume within the UK seafood value chain