Changing Tides

A strategy for Scotland’s seafood industry

Scotland
A LAND OF food and drink
Foreword

Changing Tides is the catalyst for change, ensuring the seafood sector can face the challenges ahead as a viable and sustainable industry built on the fabulous natural resources existing around our coast.

Seafood Scotland has been a long standing member of the Scotland Food & Drink Partnership and a co-author of Ambition 2030. We have created Changing Tides to outline how the Scottish seafood sector can make a significant contribution to the vision outlined in Ambition 2030.

Throughout the strategy we have identified the immediate challenges faced by our industry. The aim is to provide the right mix of opportunity, ambition and realism to meet these challenges with the seafood sector and our supporting partners well placed to drive meaningful change.

Irrespective of Brexit the actions laid out in Changing Tides are necessary to move the industry forward. Without action we will be unable to realise the industry’s full potential. We have a real opportunity to act collaboratively across the sector. In turn we hope that progress on Changing Tides will provide confidence for the sector to invest and innovate.

With the industry embracing and often at the forefront of sustainable fishing and the majority of our stocks rooted in accredited responsible fisheries management schemes, there is no reason why the industry should not continue to develop successfully.

The Scottish seafood sector will contribute to the Scottish economy by creating innovative new products and processes, finding new markets at home and abroad while expanding existing markets.

Although the development of Changing Tides has been led by Seafood Scotland, there has been a significant degree of consultation and collaboration in generating this strategy. On behalf of the board of Seafood Scotland we would like to thank the many contributors for their insight, experience, openness, vision and valuable time. Thanks also to the Scottish Government for their continued support and endorsing the direction of the strategic action plan and to Sarah Burnett for her ability in pulling our thoughts into such a robust plan.

Changing Tides is by no means the end of a process; it’s the beginning. It’s a route map for success and helping to sustain momentum.

Patrick Hughes
Head of Seafood Scotland

Scotland’s seas and coasts contribute to our natural larder, providing us with some of the finest seafood in the world.

Langoustines, mackerel, haddock, scallops are some of the diverse species to be found in our waters, while those waters have also provided us with the right environment to farm salmon and now mussels and trout. Our seafood is renowned and respected - it helps make Scotland a Good Food Nation at home and abroad, and we want this reputation to grow further. This is as much down to the people involved in the sector as much as the produce - they are key to our future success.

I welcome this action plan which will help deliver the next steps to drive the sector forward. Key building blocks are the need for sustainable management of resources and a willingness to innovate, helping to create investment and maintain high-value jobs, often in the most remote and rural communities in Scotland.

Changing the Tides in these uncertain times will be challenging but the sector has strengths on which to make the most of future opportunities. As Rural Economy Secretary which values the role and contribution which the seafood sector makes to our social and economic wellbeing, I look forward to supporting the sector, working with business and communities, to realise its ambitions.

Fergus Ewing
Cabinet Secretary for the Rural Economy
In 2017, Scotland Food & Drink set out its Ambition 2030 strategy to double the value of food and drink to £30bn by 2030. The seafood sector aims to make an important contribution to that aspiration.

In the process, we will create jobs and economic benefits across the nation.

Ambition 2030 involves focusing on our markets at home and abroad, our brand, and three main pillars of growth: people & skills, supply chain and innovation. In the seafood sector in Scotland, similar priorities apply, and our action plan focuses on four key themes:

- market development and brand
- investment and innovation
- people and skills
- supply chain

For each of these themes, the plan sets out a number of key actions that will remove barriers or unlock opportunities. They have been developed with wide engagement across the Scottish seafood supply chain.

Common to all the actions is the need for industry-wide collaboration and public-private alignment. All parts of the industry and government and other stakeholders need to work together to deliver our ambitions, with Seafood Scotland playing a leadership role in driving collaboration and progress.

Alongside the actions in this plan, the UK Government’s negotiations around Brexit and fish quotas in UK waters must secure the Scottish seafood industry’s access to raw materials - a prerequisite for future success. Without access to sufficient raw materials, neither the catching sector nor the processing sector in Scotland can thrive.
Scotland’s seafood industry in 2030

The actions in this plan will support the growth of the sector up to and beyond 2030, but our ambitions go beyond economic data – to how we operate and how we are seen.

So, what do we want to be in 2030?

RESPONSIBLE
The businesses that fish and farm in Scotland’s waters, and their supply chains, are economically important across Scotland, from the Highlands and Islands to the Borders.

They sustain rural communities and businesses, create jobs in urban areas, support both traditional skills and modern advanced technologies, and promote Scotland’s reputation. We want this to continue, with seafood valued as an industry that invests in people and communities.

We also want to be known as an industry that operates responsibly, with relevant accreditation across the whole supply chain.

And from seabed to shoreline, we will continue to look after our natural resources, and use innovation and science to respond to future challenges.

PROFITABLE
There are good opportunities for our industry to grow, including adding value to what we catch.

But to grasp this, we need a regulatory and business environment conducive to growth, where regulators and policymakers balance the economic, social and environmental pillars of sustainability across the entire marine environment.

We also need trading relationships that allow Scottish seafood businesses of all sizes to export profitably and compete globally on both quality and cost.
COLLABORATIVE

Profitability will also stem from collaboration, with all parts of the supply chain pulling together to share risk, reduce waste and add value within Scotland.

The industry will cooperate with other marine users, the Scottish Government and other stakeholders, seeking constructive approaches that balance the needs of different industries and communities.

We will collaborate with other industries on marketing and innovation opportunities that could unlock growth.

DIVERSE

We want a workforce where people of different nationalities, gender, background and age can pursue various career pathways. This will help us to respond to change and new opportunities, all the while remaining competitive.

We want a landscape where businesses from start-ups to multinationals can thrive across the supply chain. Also we want to sell diverse products and services, avoiding over-reliance on a handful of species, including using innovation to open up new market opportunities.

ADMIRED

Scottish seafood is already trusted and renowned worldwide, but we could take this further, making our industry world-leading on many levels.

We want our regulatory / policy environment to be admired globally, using evidence-based regulation that supports responsible growth and innovation.

We want to be seen as a nation embracing innovation and technology throughout the supply chain.

We want our research base to be world-leading too, with students, researchers and businesses worldwide looking to Scotland as a centre of excellence in education and R&D.

And, of course, Scottish seafood should still be a flagship food and drink product, trusted the world over for its quality, flavour, provenance and responsible practices.

This action plan will help us be all these things.
Scotland’s seafood industry has huge potential. Our reputation for high-quality produce – caught or farmed sustainably – reaches across the world, to Brussels, Boston, Beijing and beyond.

Not only does this reputation fuel export success, it provides a halo effect for Scottish food and drink, helping other sectors sell their produce abroad.

The sector is economically and socially important too, especially in coastal and fragile rural communities. Scotland has four out of five of the UK’s largest fishing ports, by landings, and accounts for most of the UK’s aquaculture production.

Almost 5,000 people work on Scottish-registered fishing vessels, and there are over 8,000 jobs in seafood processing across Scotland. Aquaculture (including the supply chain) supports over 12,000 jobs, many of them in rural areas.

“I exclusively use Scottish seafood not only for its provenance but for its freshness and most of all flavour. For a country as small as ours, we really do punch well above our weight when it comes to producing the finest seafood.”

Mark Greenaway, Restauranteur, Edinburgh

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466,000 tonnes of fish landed by Scottish registered vessels (2017)

188,000 tonnes of seafood farmed in Scotland

Landings by Scottish registered vessels worth £560 million (2017)

64% Scottish fleet’s share of total landings by UK vessels

2,065 active Scottish-based vessels in 2017 – +32 on 2016

150+ seafood processing sites and 8,380 processing jobs in Scotland

12,000+ jobs in aquaculture in Scotland (incl supply chain)

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All this makes Scottish seafood a key sector for our nation, our rural and coastal communities, and our customers.

But as well as successes, we have challenges – challenges that are best tackled industry-wide. If the industry fragments, with different sub-sectors setting their courses in isolation from each other, we may fall short of our potential and risk some of our strengths.

The following pages set out an industry-wide action plan to address these challenges, unlock growth and make our industry world-leading – responsible, profitable, innovative, sustainable and admired.

Many organisations have a role in delivering the plan, and Seafood Scotland will work closely with all of them, to galvanise and coordinate activity, monitor progress, and reinforce the industry’s ambition.

**WHAT’S WORKED WELL FOR THE INDUSTRY?**

| Quality and improving consistency of wild-catch through, eg, shorter trips, improved handling |
| Increased number of independently-verified sustainable fisheries in our waters |
| Ambition across the industry – from investment in boats to processors seeking to innovate and automate |
| Reputation of Scottish seafood, based on provenance and quality |
| Commitment to high standards – eg more processors achieving BRC / SALSA status |
| Financial and policy support provided by the Scottish Government e.g. EMFF; National Export Plan; National Marine Plan; Investment in Infrastructure |
| Strong demand domestically and internationally for seafood |
| Collaboration culture emerging |
| Growing consumer awareness of health benefits of fish |

**OUR CHALLENGES AND UNCERTAINTIES**

- Financial strength of competitors, and uncertainty of funding to promote Scottish seafood
- Greater supply chain interaction and innovation needed
- Skills and labour shortages
- Availability of processing capacity to handle our raw materials and add value
- Low margins and the ultra-competitive nature of the retail market
- Desire for more enabling regulation
- How to get UK consumers eating more fish
- How to create an environment where businesses can thrive and attract investment
- Post-Brexit uncertainty about access to raw materials, key markets and quotas

“The best seafood must come from the cleanest water and from sustainable sources. Great quality is not created by accident and Seafood from Scotland delivers it all.”

Sam Bungchayapoom, Gourmet One Thailand

**Addressing our challenges is essential to our 2030 targets. Our competitors around the world will invest in growth, and so must we.**

**Collaboration is crucial. Ambition too.**
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MARKET DEVELOPMENT AND BRAND

We already have a reputation for great seafood. How do we build on that? So that in 2030:

- We have a Scottish seafood marketing organisation sufficiently funded and adaptable to respond to market forces and support the brand at home and across the globe
- We have a strong Scottish brand associated in our three main markets (Scotland, the rest of the UK, and international) with provenance, quality and responsibility. The brand is supported by ongoing marketing activity
- Businesses of all sizes enjoy frictionless access to markets in Europe and key markets beyond Europe, and support to access new markets

ACTION 1: SECURE MARKETING SUPPORT FOR HOME AND INTERNATIONAL MARKETS

Our industry needs secure and long-term funding to promote Scottish seafood at home and abroad and strengthen our brand.

However, the funding of Seafood Scotland is uncertain and inflexible. This undermines efforts to market Scottish seafood, and puts in doubt the support available to exporters or potential exporters.

Putting in place strong and continuous marketing support would allow a promotional push at home to consumers, and allow us to develop promotional and educational programmes that incorporate seafood into the wider food education programme (see Action 11). Exploratory work should also take place into the creation of a Scottish brand that adequately reflects provenance, quality and responsibility.

A strategic review will take place into alternative long-term funding streams for marketing support for Scottish seafood. This review will look at models such as the Norwegian Seafood Council, and ensure that the current UK levy is effectively used to support the Scottish seafood sector.

Responsible: Seafood Scotland
ACTION 2: FACILITATE GROWTH WITH MARKET INTELLIGENCE AND PRACTICAL SUPPORT

Market intelligence is essential for success. To support growth, we should fully utilise the collaboration within the Scotland Food & Drink Partnership’s UK and export activity.

We must remain alert to the market opportunities for different species and make the most of collaborative marketing opportunities with other food and drink sectors.

Longer-term, we should work towards having seafood-specific in-market expertise in key geographical regions.

In addition, Seafish, Seafood Scotland, Scottish Development International (SDI) and industry should conduct ongoing research into what’s important to our customers in Scotland, the rest of the UK and internationally, making sure that our USPs are relevant.

SDI and the SF&D in-market specialists should also assist businesses with regulatory requirements and export logistics in key markets, providing information they can easily translate into action and growth.

**Responsible:** Scotland Food & Drink Export Board, Scotland Food & Drink UK Market Development Board, Seafish

ACTION 3: OFFER BUSINESSES GREATER SUPPORT TO NAVIGATE THE COMMERCIAL LANDSCAPE

To thrive (or even survive) in the ultra-competitive and continually changing commercial environment, the industry needs to engage with the support and insights currently available. This will help businesses to adapt to potential changes and trends.

There is an immediate need for the food and drink sector to address the challenging commercial environment with the assistance of the government, local authorities and support organisations.

The seafood sector must also continue to explore product development to build on new consumer eating trends (such as wellbeing or food on the go), or novel marketing approaches whilst increasing productivity to improve profit margins.

To do this, Seafood Scotland will host an event for seafood businesses in order to demonstrate the support services available. This event will enable businesses to understand where and how they can readily use this information to upskill or develop new products or approaches.

**Responsible:** Scotland Food & Drink UK Market Intelligence, Make Innovation Happen, Seafish

Markets change; that's a fact of life. Existing ones may expand or weaken; new opportunities may emerge; and competitors will always target our key markets. We must stay on top of this.
ACTION 4: USE STANDARDS AND ACCREDITATION TO SUPPORT MARKETING AND IMPROVE BUSINESS PERFORMANCE

To build trust and strengthen our brand at home and abroad, we want every business in Scotland achieving a minimum industry standard of which we can be proud. We should also back businesses to go beyond the minimum.

Firstly, in the seafood processing sector, a responsible, accountable and financially sustainable accreditation scheme should be implemented as a minimum industry standard. This standard would encapsulate all the necessary legal requirements to not only support the marketing of Scottish seafood but act as a tool to help the performance of small businesses.

Secondly, we will develop an online toolkit (or another appropriate resource) for industry that explains relevant standards and accreditations (such as MSC, PGI, SALSA and RFS), identifying the support available and work required to achieve and retain them.

Responsible: Scottish Seafood Association (Development of industry standard), Seafish, Seafood Scotland (Development of toolkit)
INVESTMENT AND INNOVATION

Reaching our targets for 2030 is dependent on investment and innovation. We need:

- Businesses that are confident about embracing automation and innovation and can access support that facilitates it
- A healthy investment eco-system, with connections to investors at home and abroad, and high levels of investment-readiness along the supply chain
- A business, taxation and legislative environment that encourages long-term investment in growth

ACTION 5: BUILD THE INDUSTRY’S ABILITY TO GENERATE INVESTMENT

Many ambitious businesses lack access to finance, stifling their ability to invest or grow. We need to improve the seafood sector’s access to finance – along the full supply chain.

A priority is for businesses to increase their expertise in working with financial institutions and developing propositions to encourage investment. The creation of an investment toolkit that demonstrates how businesses can attract inward investment and present themselves to investors could support businesses across the supply chain. There is scope for the industry to work with the professional services sector here, as well as with enterprise agencies.

Responsible: Seafood Scotland, with input from professional services sector

ACTION 6: CREATE AN ENABLING ENVIRONMENT FOR BUSINESSES

Stakeholders in the seafood industry, including regulators and local authorities, should continue to collaborate with the industry to create an enabling business and regulatory environment. This will make the industry more attractive for investment.

This should include removing unnecessary or unfair financial and regulatory burdens that stifle ambition and prevent businesses from growing sustainably. In particular, growth could be unlocked by a review of inconsistencies in business rates and the creation of fairer export certification processes.

In addition, when drawing up post-Brexit arrangements for our sector, policymakers should address the issue that State Aid de minimis support rules currently put seafood companies at a disadvantage to other food manufacturers at home and abroad.

Responsible: Local Authorities, Scottish Government, Seafish, Seafood Scotland, UK Government
**ACTION 7: ENSURE ACCESS TO INNOVATION SUPPORT FOR SEAFOOD BUSINESSES, AND LOOK AT AUTOMATION OPPORTUNITIES**

There is innovation support in Scotland, but it’s a complex landscape. Businesses need help to navigate it.

To compete globally and grow, businesses of all sizes must be able to access innovation support on anything from new product development to extending shelf life to new technology.

The Scotland Food & Drink Make Innovation Happen service can play a crucial role in simplifying commercial innovation, and the service should recognise the imperative to support the seafood sector.

At the same time, more businesses in the sector should engage actively with the service, articulating their needs and making use of the assistance available.

A priority for the whole sector is embracing technology innovation, and automation in particular, and support is needed here. Seafood Scotland will map out opportunities and best practice, looking at lessons from nations such as Iceland, and to develop automation approaches that would benefit Scottish businesses.

This should support efficiency and long-term profitability, always aiming for value to be added in Scotland in preference to exporting whole fish.

**Responsible: Make Innovation Happen, Seafood Scotland**

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**ACTION 8: DESIGN NEW FUNDING SUPPORT FOR INNOVATION AND GROWTH POST-BREXIT**

In planning for Brexit and beyond, the UK and Scottish governments must put in place successor funding to the European Maritime and Fisheries Fund (EMFF), including investment for ports and infrastructure.

EMFF support has played an important role in our sector, and has included funding for vessels, SME processing facilities, market development, innovation and skills development. Brexit will cut off current opportunities under the fund, and we must ensure there is equivalent support for innovation and capacity-building long-term.

We should also take the opportunity to tackle discrepancies in EMFF funding – for example, looking to make support available to businesses of all sizes (including large enterprises which are excluded from the current EMFF scheme).

**Responsible: Scottish Government, UK Government**
PEOPLE AND SKILLS

Today and tomorrow, in 2020 and 2050, our sector needs the right people and the right skills – from industry leaders through to the next generation of apprentices. In 2030 we want to be:

- A sector attractive and accessible to people at all levels of entry – from school leavers to career changers to entrepreneurs to investors
- An industry that invests in people: we build skills (including in new areas that will keep our industry competitive), retain talent and plan for succession

ACTION 9: IMPLEMENT THE SEAFOOD SKILLS ACTION PLAN

The Scottish Seafood Partnership created a skills action plan in 2016, which still remains relevant today. This should be implemented.

This sector-specific programme aims to boost the capabilities and ambition of seafood businesses. Key areas within the action plan include skills gaps in the processing sector which are stifling investment in technology, R&D and growth.

To encourage and simplify participation, the programme should include developing a package of training options with clear funding mechanisms that are linked to a framework of training providers.

This would include making good use of the Apprenticeship Levy to provide Modern Apprenticeships and Graduate Apprenticeships, both of which would generate benefits across the industry.

The programme would also promote skills development by increasing the sector’s ability to deliver in-house training.

Responsible: Skills Development Scotland, SF&D Skills Board, Scottish Seafood Training Network

ACTION 10: DEVELOP A LEADERSHIP PROGRAMME FOR THE SEAFOOD INDUSTRY

Develop a leadership masterclass programme that will not only develop world class leaders of seafood businesses but also a pipeline of leaders for the industry of the future. The programme will support businesses bringing through the next generation of leaders, especially within family businesses. Inspiration from other leading visionary businesses within the Food & Drink sector will also form a key component of the new programme.

Responsible: Scottish Enterprise, Highlands & Islands Enterprise, South of Scotland Economic Partnership
ACTION 11: INCORPORATE SEAFOOD INTO FOOD EDUCATION PROGRAMMES IN SCHOOLS

For the seafood industry in Scotland to thrive, we must teach children about where seafood comes from and why it’s good for them. We must also make primary and secondary schoolchildren, teachers and careers advisers more aware of careers in the industry.

With funding for the Seafood in Schools programme now ended, there are fewer opportunities to do either of these.

Scotland does have a suite of food & farming education projects in schools, and seafood should be integrated into these. We will develop a seafood education programme to sit within the wider food education programme, at both primary and secondary levels. This should make schoolchildren and educators aware of career opportunities in the industry, as well as the health benefits of eating seafood.

Responsible: Education Scotland, Scottish Government, Seafood Scotland

ACTION 12: ENSURE ACCESS TO A POST-BREXIT WORKFORCE

Post-Brexit arrangements must ensure all parts of the Scottish seafood industry have access to the workforce they need – in 2020, 2030 and beyond.

There are particular concerns in the processing sector and in areas of almost full employment, where there is a heavy reliance on EU workers. In the Grampian region, 70% of total reported workers in the processing sector were citizens of other EU countries in 2016; the rest of Scotland averaged at 57%.

In the short and medium term future, it will be extremely difficult to replace EU workers with local workers with the relevant skill-sets. Therefore, post-Brexit arrangements around immigration and work permits must take account of the needs of the seafood industry including seasonal workforce, and its importance to the Scottish economy. In the absence of any UK-wide scheme, Scotland should pilot a regional scheme.

We must ensure Scottish seafood businesses have access to the year-round workforce they need. We must also attract and retain the research talent and other qualified people we require.

All arrangements should include provision for non-EU workers as well as EU nationals.

Responsible: Scottish Government, UK Government

SUPPLY CHAIN

In doubling turnover by 2030, we want growth that is equitable and profitable, with the entire supply chain, from sea to shelf, pulling together for success. The supply chain of 2030 should:

• Aim to unlock value and reduce waste at each stage, so we stay ahead of competitors and drive profitable growth
• Be built on a culture of trust, collaboration, effective communication and sustainability

ACTION 13: SUSTAINABLE FISHING AND VERIFICATION OF SUSTAINABLE FISHERIES

Sustainable fishing, responsible fisheries management and traceability have won confidence and trust from customers and consumers and brings benefits along the supply chain. We should continue to build on this.

Scotland’s commercial fish stocks should continue to be harvested sustainably (both environmentally and economically) leading to increased long-term stability.

Our fishing fleet, which is seen as an exemplar in global sustainable fishing practices, is confident in securing a long-term income from the available sustainable fishing opportunities across all sectors.

Responsible: Scottish Pelagic Sustainability Group, Scottish Fisheries Sustainable Accreditation Group

ACTION 14: IMPROVE OUR DATA ON THE VALUE CHAIN IN SCOTLAND, AND USE IT TO UNLOCK GROWTH

A report on the Value of Aquaculture to Scotland was commissioned by Marine Scotland and Highlands and Islands Enterprise and published in 2017. By mapping aquaculture’s economic and social impacts Scotland-wide and improving the information available to stakeholders, the report has enriched policymaking and planning. The rest of the seafood sector could also benefit from such an exercise.

We recommend commissioning an equivalent report covering the catching sector’s value chain in Scotland, both upstream and downstream.

With a more complete economic overview of the sector, businesses and public sector alike will be better positioned to plan for growth, understand opportunities and address constraints – on issues from workforce to infrastructure to growth capacity.

Responsible: Seafish, Seafood Scotland
**ACTION 15: MAP THE TRANSPORT & INFRASTRUCTURE CONSTRAINTS ON GROWTH AND THE OPTIONS FOR IMPROVEMENTS**

An integrated supply chain must include integrated multi-modal transport systems, ensuring businesses can get their product to the right place in the right condition, at the right cost and time.

The growth and profitability of the industry is limited by a variety of transport issues in Scotland, including roads, chill facilities at airports, timings and freight capacity of ferry services, and the application of the Road Equivalent Tariff (RET).

The sector would also benefit from freight facilities at Scottish airports to support direct international routes.

Post-Brexit, delays at border points may also affect our sector, and could be avoided by having customs clearance posts in Scotland.

The aquaculture 2030 growth strategy recommended a sectoral mapping exercise to determine aquaculture’s transport logistical constraints. In conjunction with existing government work streams we recommend taking this recommendation further. Through mapping constraints across the entire seafood sector and looking at the potential for new domestic and international routes and chill facilities we can support sector growth.

**Responsible: Market Driven Supply Chains (MDSC) project, Scottish Government**

**ACTION 16: MAXIMISE THE VALUE IN WASTE**

Zero Waste Scotland, Scottish Government and other sector stakeholders have identified good opportunities to make better use of waste in the sector. We should embrace the potential here.

Bio-based waste and by-products from fish and shellfish (farmed and caught) add up to some 190,000 tonnes a year in Scotland. Using these more innovatively – for example, in agriculture, animal feeds, nutraceuticals, cosmetics and other industries – could create new income streams for waste producers, create jobs, and boost the circular economy in Scotland.

We recommend that the industry build on existing studies – such as the Circular Economy Sector Study on Fish – and work actively with Scottish Government and Zero Waste Scotland to develop commercial solutions around waste and by-products.

**Responsible: Zero Waste Scotland, Industry, Seafish, Seafood Scotland**

**ACTION 17: CAPACITY WITHIN THE SEAFOOD PROCESSING SECTOR (POST-BREXIT)**

Although the outcomes of Brexit are far from certain there is a potential scenario where the fish quota allocated to Scottish vessels could increase and result in a significant increase in fish landings. To fully capitalise on the increased landings there is a requirement for a robust Scottish processing sector and supporting infrastructure to maintain a presence of both primary and secondary processing that maximises the added value return to the Scottish sector.

Currently it is unclear if the Scottish processing sector could cope with a significant increase in Scottish landings. It is therefore recommended that a review is carried out to determine the current capacity of the Scottish seafood processing sector and the likely processing requirements based on increased landings.

Working with the Scottish Government’s analytical and economic specialists the study will investigate the various sub-sectors for the seafood industry and develop a Scotland wide approach to meet the anticipated demands.

**Responsible: Aberdeenshire Council, Scottish Government, Seafood Scotland**

**ACTION 18: BEYOND BREXIT BLUEPRINT**

In light of the impending changes resulting from Brexit and the potential uplift of fish landings through a coastal state setting, there is an opportunity to set a seafood supply chain blueprint for the entire industry. Working in partnership with industry and the Scottish Government, the beyond Brexit blueprint would detail the steps required throughout the seafood supply chain to make the necessary step change, as well as outline the support required, to seize the opportunity and demonstrate the impact of this collaborative approach.

**Responsible: Scottish Government, Seafood Scotland**

Alongside the actions included in this strategy, we support the Aquaculture Growth to 2030 Strategic Plan and its intent to deliver economic and social benefits.

In particular, we echo the plan’s call for enabling and proportionate regulation and policymaking that is conducive to sustainable economic growth. This approach should apply across the seafood industry – to the catching sector as well as aquaculture – and balance the needs of both sectors.

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10 Ibid.
Onwards and upwards

Organisations across the seafood industry have contributed to this action plan; organisations across the industry also have a role in making it happen.

The task now is to kick off the actions and monitor our progress on them. There is a clear role for Seafood Scotland to take the lead here, keeping up the energy, collaboration and commitment required for growth (in addition to delivering the actions for which it is directly responsible).

If we can fully deliver this action plan, the prizes will be great – growth and profitability for individual businesses, job creation, vibrant coastal communities, economic gains, and an even stronger reputation for Scottish seafood than we already have.

We look forward to making all this happen.
ACKNOWLEDGEMENTS

This action plan came about through a series of ten engagement sessions across Scotland: in Aberdeen (x 2), Bellshill, Inverness, Mallaig, Mintlaw, Musselburgh, Orkney, Scrabster and Shetland.

They were attended by businesses and stakeholders across the supply chain, including: shellfish and finfish producers; the catching sector; processors; retailers, and representatives from government, enterprise and skills agencies, Scotland Food and Drink, and fishing organisations, among others.

At each session, attendees discussed the opportunities and challenges facing the industry, the successes and progress already achieved, and their recommendations for hitting our 2030 targets.

The content in this action plan has been synthesised from their discussions, and we are grateful to all those who contributed – they are too numerous to mention individually.

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Scottish Seafood Association
Scottish Seafood Training Network
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Seafood in Schools
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Shetland Island Council
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