

**NORTH EAST SCOTLAND FISHERIES DEVELOPMENT PARTNERSHIP****VIRTUAL MEETING, FRIDAY, 18 FEBRUARY, 2022**

- Present:**
- Aberdeenshire Council** – Councillors J Cox (Chair), C Buchan, A Forsyth, and D Mair.
  - Aberdeen City Council** – Councillors C Allard, M Greig, and J Johnstone.
  - Marine Scotland Science** – L Blackadder.
  - Members of the Scottish Parliament** – M Chapman MSP, and A Nicoll MSP.
  - Moray Council** – Councillors M Macrae and S Warren.
  - North and East Coast Regional Inshore Fisheries Group** – J Mouat.
  - Peterhead Port Authority** – P Duncan.
  - Scottish Enterprise** – I Garrett.
  - Scottish Fishermen’s Federation** – E Macdonald.
  - Scottish Pelagic Fishermen’s Association** - I Gatt.
  - Seafish** – H Duggan, J Sparks, and R Watson.
  - Seafood Scotland** – D Fordyce and K Galloway.
- Apologies:**
- Aberdeenshire Council** – Councillors D Beagrie, A Kille, G Reynolds, M Roy, and I Sutherland.
  - Aberdeen City** – Councillor T Mason, J Laing and R Sweetnam.
  - Angus Council** – A Smith.
  - Members of Parliament** – K Blackman, D Duguid (R Duncan substituting), S Flynn, and R Thomson (D Manson substituting).
  - Members of Scottish Parliament** – K Adam, J FitzPatrick, M Gougeon (C Beattie substituting), M Marra, S Robison, K Stewart, M Villalba, and T White.
  - Scottish Maritime Academy at North East Scotland College** – L Hope.
  - Scottish Seafood Association** – J Buchan and A Knight.
- Officers:**
- Aberdeenshire Council** – N Chidester, N David, J Grant, D McDonald, and A Reid.

**1. WELCOME AND INTRODUCTIONS**

The Chair welcomed those in attendance to the meeting. Apologies from Members were noted. Those in attendance from the industry were introduced.

**2. EQUALITIES**

In taking decisions on the undernoted items of business, the Partnership **agreed**, in terms of Section 149 of the Equality Act 2010:-

- (1) to have due regard to the need to:-
  - (a) eliminate discrimination, harassment and victimisation;
  - (b) advance equality of opportunity between those who share a protected characteristic and persons who do not share it, and
  - (c) foster good relations between those who share a protected characteristic and persons who do not share it; and
- (2) to consider, where an equality impact assessment has been provided, its contents and to take those into consideration when reaching a decision.

### **3. MINUTE OF MEETING OF 12 NOVEMBER, 2021**

The Minute of Meeting of the North East Scotland Fisheries Development Partnership (NESFDP) of 12 November, 2021 was circulated and approved as a correct record.

### **4. MATTERS ARISING**

All matters arising from the Minute of Meeting of 12 November, 2021 had been actioned.

### **5. JOINT PRESENTATION ON CONSUMER TRENDS AND THE SEAFOOD SUPPLY CHAIN BY RICHARD WATSON, MARKET ANALYST, SEAFISH; KAREN GALLOWAY, HEAD OF RETAIL, SEAFOOD SCOTLAND; AND JESS SPARKS, REGIONAL MANAGER – SCOTLAND, SEAFISH**

Members **noted** a joint presentation from Richard Watson (Market Analyst, Seafish), Karen Galloway (Head of Retail, Seafood Scotland), and Jess Sparks (Regional Manager – Scotland, Seafish) which covered shopper trends and the seafood supply chain. Mr Watson explained Seafish's role to provide market insight for retail, foodservice, trade, and consumer trends and highlighted the content of each report in turn, starting with retail reports (sector/segment/species, demographics, grocery trends, and shopper trends), followed by foodservice reports (seafood servings, channel performance, day parts, and trending flavours/formats) and then trade reports (monthly reports, annual trade factsheets, and Globefish insight reports). Mr Watson reviewed current industry challenges: falling seafood consumption; falling demand for traditional white fish species and an increased demand for farmed species. He concluded by emphasising the importance of seafood quality, price, and health/nutrition to UK seafood shoppers.

Ms Galloway discussed how to generate targeted, focused, and responsive seafood demand. She reviewed the Ambition 2030 programme which focussed on market development, innovation, people & skills, and supply

chain integrity. She explained the new Knowledge Bank which will provide insight to help food businesses to understand and respond to market needs and reviewed local buying trends, which were driven by Covid messaging and behaviour.

Seafood purchasing in Scotland was growing strongly but relied on own-label marketing. Salmon, prawns, cod, haddock, and tuna were still the main species in demand; introducing new species to consumers was difficult. International market opportunities were in health and wellness, with green credentials being important. International markets had different opportunity timescales.

Seafood Scotland overlaid market trends with industry needs and availability via their partnership approach. Seafood Scotland were exploring and involved in seafood expo's, retail (independents & multiples), food tourism, festivals and local events, international markets, education, industry leadership and capability building.

Members asked how the seafood market compares to other food proteins, the impact of major retailers removing fresh fish food counters from their stores, how UK trends compare to those of mainland Europe, the impact of negative NGO messaging on seafood consumption, the need for effective marketing, and the importance of connecting with inland communities. Ian Garrett (Scottish Enterprise) highlighted the Prepare to Export Programme aimed at business-to-business contracts and offered assistance to anyone interested.

It was **agreed** that understanding how UK seafood trends compare to other countries should be explored at a future meeting.

Mr Sparks then shared a presentation on seafood supply chain credentials. Meeting accreditation requirements was vital and increasingly complex. He reviewed UK market eligibility factors including environmental sustainability, food safety, climate change, welfare (human, social, and animal), the marine environment, and science innovation and research. Mr Sparks outlined Seafish's efforts to address concerns including building capacity and capability through support networks, innovation, partnerships, supply chain development and skills.

Following Mr Sparks' presentation the partnership asked questions about protecting the reputation of the industry. Following which, Ms Galloway highlighted the importance of thought leadership and building capability to maintain supply chain integrity. She reviewed key areas to build agility and adaptiveness including the adoption of automation, skills/capability building, collaboration within the industry and developing future leaders.

The Chair then thanked the presenters for their detailed input.

**ACTION 1: Comparison of UK and European seafood trends at a future meeting of NESFDP**

**6. PRESENTATION: INSHORE FISHERIES SCIENCE AND CURRENT ISSUES IN THE INSHORE SECTOR BY LYNDA BLACKADDER, INSHORE FISHERIES ADVISOR, MARINE SCOTLAND SCIENCE AND JENNIFER MOUAT, CHAIR, NORTH AND EAST COAST REGIONAL INSHORE FISHERIES GROUP(RIFG).**

Members **noted** a presentation from Lynda Blackadder (Inshore Fisheries Advisor, Marine Scotland Science) and Jennifer Mouat (Chair, North and East Coast Regional Inshore Fisheries Group).

Ms Blackadder reviewed the Coastal and Offshore Fisheries Network, which included two programmes: Fisheries Assessment and Advice Programme; and Fisheries Data Programme. The Fisheries Assessment and Advice Programme focussed on stock assessment and modelling, and a fisheries advice group to support policy colleagues. The Fisheries Data Programme had three groups focused on statistics, data collection, and fishing technology.

There were three annual TV surveys for Nephrops, three annual dredge surveys for scallops, monthly port sampling at all ports in Scotland. At present there are no dedicated surveys for crab or lobster nor observer programmes for scallop dredge or creel vessels. Ms Blackadder briefly reviewed specific projects including the Razor Clam trial (collecting biological and fisheries data), the Outer Hebrides Inshore Fisheries Pilot (OHIFP) (to develop a baseline), a seal deterrent project, and the Scallop Assessment Working Group (ICES WGSCALLOP).

Members raised questions on the impact of stocks by hobby fishermen, stock assessments and on funding for more investment in research.

Ms Mouat reviewed the Regional Inshore Fisheries Groups (North and East Coast, West Coast, Outer Hebrides, Orkney Sustainable Fisheries, and the Shetland Shellfish Management Organisation) with particular emphasis on the North and East Coast RIFG. RIFGs develop Fisheries Management Plans which aim to improve the sustainable management of inshore fisheries and to amplify the voice of commercial inshore fishers. Inshore opportunities within the North East included encouraging access to new entrants, business diversification, developing better onshore infrastructure, more investment in science and in marketing/branding and certification. She reviewed recent policy developments, including the Joint Fisheries Statement which was out for consultation, the Future Catching Policy and The Bute House Agreement. Key issues faced by the sector in the North East included Covid, Brexit (markets), gear conflict, increased marine traffic, new aquaculture (eg seaweed farms), displacement of effort, extreme weather events, and the 'spatial squeeze'. Ms Mouat concluded by emphasising the importance of Net Zero targets for the inshore sector.

Questions were raised about topics including economic support available for vessels displaced from traditional grounds, the importance of reputation, new routes to market, sustainability, Net Zero targets and fishing in decommissioned (oil and gas) areas.

Following the question and answer session, the Chair thanked the presenter.

**7. UPDATE: SEAFOOD EXPORTS/CERTIFICATION/REGULATION BY JOHN GRANT, TEAM MANAGER (FOOD SAFETY/PORT HEALTH), ABERDEENSHIRE COUNCIL**

Members **noted** an update from John Grant (Team Manager – Food Safety/Port Health, Aberdeenshire Council). His latest update to NESFDP covered trends in council-issued Export Health Certification (EHC) for seafood products exported to the European Union (EU), supporting attestations, fishing vessel registration, and the seafood import control facility at Peterhead Port Authority. He reviewed 2021 challenges and export trends. Mr Grant emphasized the importance of effective supply chain collaboration when exporting and described new export health regulations for products of animal origin. He reported that seafood exporting volumes were returning to normal despite the impact of the pandemic but that exporters to the EU were still experiencing some issues with documentation.

Cllr Allard raised the question whether EHC data might be able to shed a light on the extent to which post-Brexit complexities had influenced the balance of whole fishprocessed products exported to the EU from Aberdeenshire.

**ACTION 2: Derek McDonald to request further information from Mr Grant on this point and report back to the next meeting of NESFDP.**

**8. BULLETIN: UPDATE ON STRUCTURAL FUNDING PROGRAMMES FOR THE FISHERIES AND SEAFOOD SECTOR**

Members **noted** a report about structural funding for the fisheries and seafood sector by the Industry Support Executive. The Chair raised a question about structural fund thresholds and suggested greater flexibility to support smaller businesses.

**9. BULLETIN: THE SCOTWIND LEASING ROUND AND POTENTIAL IMPACT UPON FISHERIES**

Members **noted** a report on ScotWind by the Industry Support Executive. The scale of consents awarded in January for wind farm development greatly exceeded expectations and is likely to result in high levels of displacement for the fishing industry.

**10. REPORT: JOINT FISHERIES STATEMENT CONSULTATION**

Members **noted** a report on the current consultation on the Joint Fisheries Statement by the Industry Support Executive. It was **agreed** a special briefing session would be organised to inform a consultation response from NESFDP.

**ACTION 3: Derek McDonald, in partnership with Elspeth Macdonald,**

**to organise a briefing session on the Joint Fisheries Statement consultation with a view to submitting a response from NESFDP.**

## **11. INDUSTRY REPORTS AND ROUND TABLE ROUND-UP**

Ian Gatt, CEO of the Scottish Pelagic Fishermen's Association advised no international fisheries agreements (with Northern Coastal States) had yet been agreed for the key pelagic shared stocks of mackerel, Atlanto-Scandian herring or blue whiting. From mid-March until the end of May a series of Coastal States meetings would take place to try to reach a comprehensive sharing arrangement. He also advised no Scottish vessels were fishing for sand eels.

## **12. ANY OTHER BUSINESS**

As the meeting was the last before the local elections in May, the Chair expressed his gratitude to NESFDP members for their contributions to meetings over the past five years and also thanked council officers for organising the meetings.

Dates of future meetings:

- 1pm on Friday 26 August 2022
- 1pm on Friday 11 November 2022

## **ACTION POINTS SUMMARY**

**1: Comparison of UK and European seafood trends to be presented at a future meeting of NESFDP**

**2: Derek McDonald to request further information from Mr Grant on whether EHC data might reveal a change in the balance of whole fish and fish products exported from Aberdeenshire and to report back to the next meeting of NESFDP.**

**3: Derek McDonald, in partnership with Elspeth Macdonald, to organise a briefing session to discuss the Joint Fisheries Statement, thereafter to submit a response on behalf of the group**

**4: Meeting presentations to be posted on the NESFDP webpage**