

**NORTH EAST SCOTLAND FISHERIES DEVELOPMENT PARTNERSHIP –
22 JUNE 2018**

WORKSHOP SESSION: FUTURE PROOFING THE FISHERIES SECTOR

1 Recommendation

The Group is recommended to:

1.1 Participate in a workshop session on 22nd June, 2018 to scope the above project.

2 Discussion

2.1 At the last meeting of NESFDP on 16 February 2018 an action point was agreed whereby an analysis of the vulnerabilities, risks and challenges facing the fisheries supply chain should be carried out. Formative discussions with NESFLAG to fund such a study have been productive. Further work is required to define the scope, time frame and extent of the work and it is proposed that the collective knowledge of NESFDP members is deployed to progress the study's terms of reference prior to developing a formal application to the FLAG.

2.2 A one hour workshop is therefore proposed for the meeting of 22nd June, 2018 to carry out a SWOT assessment of the fisheries supply chain comprising the following three elements:

- a) Catching & landing
- b) First sale & processing
- c) Value add, logistics (inward and outward) & marketing

2.3 After an introduction to the agenda item from the Chair, Members will be invited to form three (self-selecting) groups to take part in facilitated discussions. Each group will consider just one of the three elements a, b or c.

The following are suggested as starting points for the group discussions on elements a, b and c:

a) Catching & landing SWOT:

Support for investment
Future access to stocks (quota, choke species, restrictions/exclusions)
Labour/crew
Future fishing policy, regulation and enforcement
'Left field' issues (eg. marine pollution, disruption to sustainability accreditation)

b) First sale & processing SWOT

Scale, security and continuity of supply
Forward landings information
Fish markets
Diversity of sector to handle species/size landings mix
Labour pool
Support for investment
Operating cost burdens (rates, utilities, labour overheads)
Resilience, reputation and accreditation
Market for co-products
'Left field' issues such as food scares, landings infrastructure

c) Value add, logistics and marketing SWOT:

Support for investment
Routes to market (Channel tunnel/contingencies)
Cross border arrangements (Tariff and non-tariff)
Change in domestic and overseas markets
Validity of UK food safety accreditation in export markets

- 2.4 It is proposed each group allocates 15 mins respectively to strengths, weaknesses, opportunities and threats to their chosen element of the supply chain a, b or c

At the end of the workshop session the normal 'round table' format will resume and members will be invited to discuss the following;

- Geographic scope: NE Scotland/ all Scotland?
- Timeframe – to 2025 or 2030?
- Product range: wild caught seafood + aquaculture production?
- Other parameters
- Sources of information to inform the study which have either been published or are in preparation

3 Scheme of Governance

North East Scotland Fisheries Development Partnership is able to consider this item in terms of its remit to provide a North East Scotland focus to enable issues and concerns across the fisheries and related sectors to be addressed. This includes strengthening economic development links between fisheries science, catching and processing sectors and the wider seafood industry, contributing to regional and local priorities for the fisheries sector, improving links between marine environment and biodiversity and contributing to policy development and consultations.

4 Implications and Risk

- 4.1 An equality impact assessment is not required because there are no differential equalities impacts arising from this bulletin.
- 4.2 There are no staffing and financial implications for the council arising from this report.

- 4.3 No risks arising from this report have been identified for the council at Corporate Level
- 4.4 No issues have been identified in relation to the Town Centre First Principle

Stephen Archer, Director of Infrastructure Services

Report prepared by Derek McDonald, Industry Support Executive (Rural & Maritime)
Date: 14th June, 2018

