The Sea Fish Industry Authority

Fisheries Administrations' response to a discussion with industry

February 2012

Llywodraeth Cymru
Welsh Government

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1. Introduction

1.1. A discussion with industry

In October 2011, the four UK Fisheries Administrations launched a discussion on the future of the Sea Fish Industry Authority (Seafish), a levy funded UK-wide Non Departmental Public Body (NDPB).

The purpose was to stimulate an open and honest discussion between all parts of the seafood industry in the UK, the four Fisheries Administrations and Seafish following the successful conclusion of a challenge to Seafish's levy raising powers and to gather industry views on the last routine review of Seafish (the Cleasby Review), the consideration of which had been delayed by the legal challenge[1].

The discussion asked fundamental questions about Seafish's future, purpose, strategy, funding, structure and governance. The discussion period was open from 6 October until 16 November 2011.

This document sets out:

- what the Administrations did to gather the industry's views;
- who participated;
- a summary of the views expressed;
- the four Fisheries Ministers' response to the discussion; and
- the next steps for Seafish.

[1] The Cleasby Review can be found at: http://archive.defra.gov.uk/temp/cleasby-review-report.pdf

2. Discussions with industry

2.1. What we did

The background to the discussion, the key issues and the questions posed were set out in a document available on Defra's website:

http://www.defra.gov.uk/consult/2011/10/06/sea-fish/

The full list of questions posed in the discussion can be found in Annex A.

In order to stimulate the discussion and in order to hear the views of as many interested parties as possible, the four Administrations, in collaboration with Seafish, held eight open workshops across the country in Cardiff, Glasgow, Plymouth, Grimsby, London, Newcastle Co. Down, Edinburgh and Aberdeen. Major levy paying companies and senior catching representatives were invited to a further discussion in London.

A summary of each event is set out in Annex B.

2.2. Who responded?

We received 105 written responses from businesses, individuals or representative organisations involved in the seafood industry in the UK. 113 organisations were represented in total.

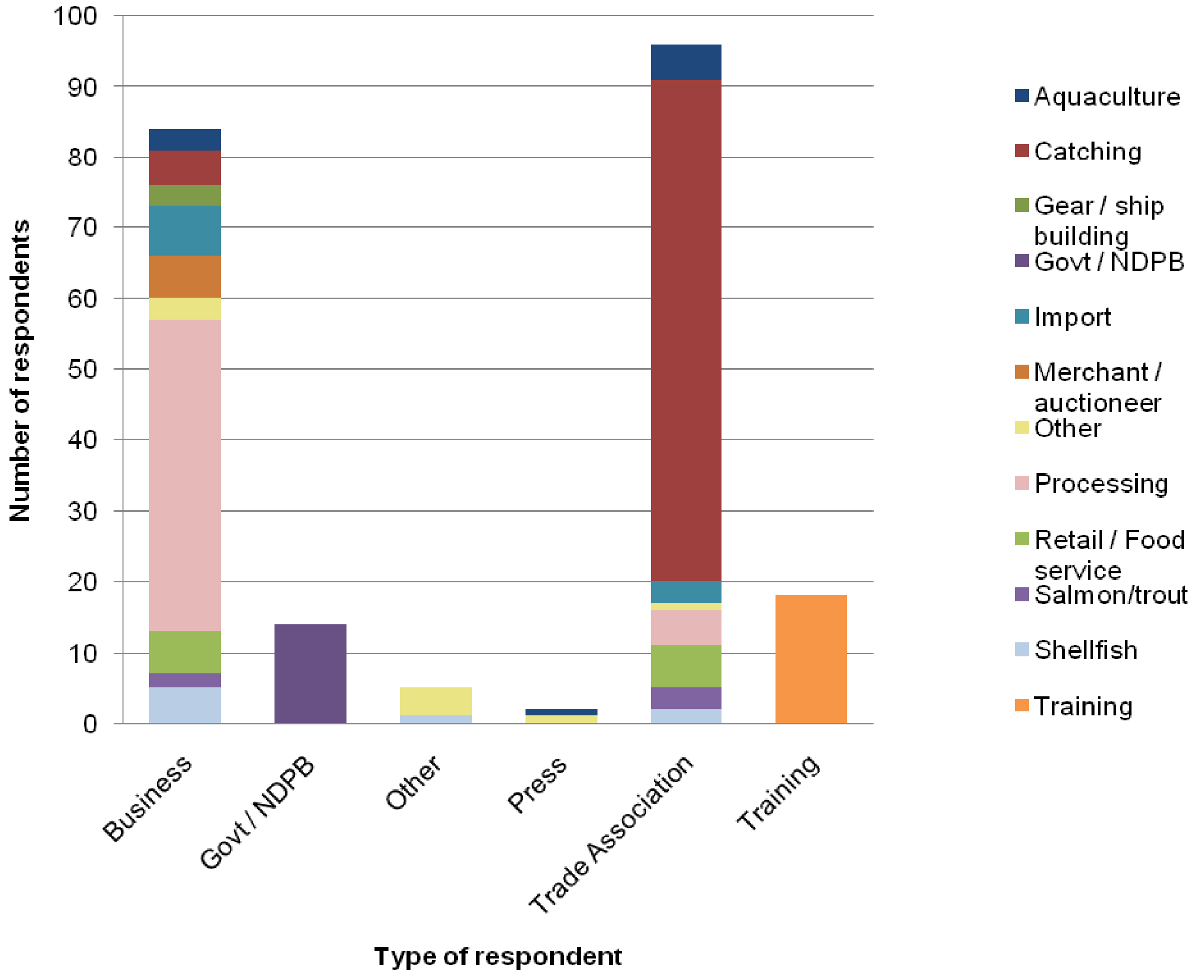
In addition, 149 individuals attended the nine events around the UK. Some attended an event and followed up with a written response. A full list of organisations represented is at Annex C. For data protection reasons, names of individual attendees are not listed. Many individuals stated an affiliation with one or more of the organisations in the list.

The seafood industry is diverse, and this was reflected in the input received. Responses and engagement came from sectors / interests including: catching (including pelagic, whitefish and shellfish), aquaculture (including salmon and trout), distribution, exporting, importing, fish frying, fishermen's training, fishmonger training, local government, marine insurance, processing, gear technology, markets / auctioneers, producer organisations, retail, food service and the trade press.[2]

[2] Responses were received from direct levy-paying companies representing 34% of the total levy in 2008/09 with trade associations representing further direct levy payers. However, overall companies responding represented a much larger proportion of the levy as "indirect" payers whereby the cost is factored into transactions throughout the supply chain.

The chart below shows the distribution of respondents by sector of the 219 total respondents.

Respondents to the Seafish industry discussion[3]



A number of associations drew up a standard response which members either used as drafted or adapted. For example, there were 47 identical responses from fishermen in Wales belonging to the Cardigan Bay Fishermen's Association and Llyn Fisherman's Association. The Food and Drink Federation's Seafood Group also submitted a standard response which its members used as a basis for their own written and oral responses.

[3] Based on 219 respondents who either submitted comments in writing and / or attended events.

3. Responses to the discussion: what you said

This section summarises the responses received, and draws out key themes around the main topics.

3.1. The rationale for Seafish

The overwhelming consensus[4] from both the workshops and written responses was that the seafood industry as currently defined[5] continues to need a body such as Seafish.

Those who supported Seafish valued the independent and unbiased status of Seafish and its position as an organisation that can bring together and represent the industry as a whole across the supply chain. They stated that Seafish should be using this unique position to focus on where they can add value. Others responded that Seafish should bring coherence across what many considered to be a fragmented industry which is extremely diverse and in need of leadership.

Within this, however, there were significant numbers who answered a qualified "yes": i.e. those who wish to see Seafish continue but who also want to see demonstrable and transformational change to the way it operates or what it does. Comments were made that Seafish needs to be more focused, more transparent and could do better to communicate its activities at a grassroots level. There was wide ranging praise for specific activities and individual staff and for improvements in overall approach in recent years. In general there was encouragement to see this development continue and a willingness from many groups to continue to work collaboratively with Seafish.

The handful who did not support the continuation of Seafish felt there was no need for such a body and that others were available to support the industry.

Respondents from the parts of the sector not currently covered by the levy (e.g. the salmon industry), were less likely to believe they had a need for a body such as Seafish.

The majority of respondents agreed that it was appropriate for Seafish to contribute to Government objectives where these aligned with the objectives of the industry or were mutually beneficial, but that the industry's needs should remain the priority. Several

[4] Out of 153 people who responded to this question, 98% supported the continuation of Seafish in some form whilst 2% did not wish to see Seafish continue in any form.
[5] Defined in the Fisheries Act 1981 as: those engaged in "the business of operating vessels for catching or processing sea fish or for transporting sea fish or sea fish products, being vessels registered in the United Kingdom"; or those who carry on in the UK "the business of breeding, rearing or cultivating sea fish for human consumption, of selling sea fish or sea fish products by wholesale or retail, of buying sea fish or sea fish products by wholesale, of importing sea fish or sea fish products or of processing sea fish (including the business of a fish fryer)."

highlighted that this should be a two way relationship with Seafish able to influence Government objectives as well.

There were mixed views on whether Seafish should position itself as “the authority on seafood”. There was support for this as a vision but many stated that Seafish needs to focus on ensuring it has the expertise and ability to meet this ambition. Others thought less favourably about this, arguing that Seafish does not meet this strong claim and that being an “authority” is not an end in itself and Seafish should be clearer what this leads to.

3.2. Seafish’s strategic approach

Views on Seafish’s current outcomes, strategic objectives and work streams for Seafish, were mixed.

Generally, responses were grouped by sector. Each sector largely believed that Seafish did not deliver enough for them. There was little recognition of the argument that levy is to be spent for the benefit of the sector as a whole and that whilst it is collected at first hand point of sale, that is just a collection point, and the costs of the levy are actually factored in sales up and down the chain.

In general, the catching sector believed that Seafish should focus on safety training and reputation management for the UK catching sector and responsiveness to issues such as Common Fisheries Policy reform and Marine Conservation Zone designation, through, for example, work on gear design. There was criticism for the proportion of levy Seafish proposed to spend on consumer-related work under their current Three Year Plan.

Conversely the priorities for importers, processors and those at the retail end of the supply chain were more focused on the contribution of imports to the UK seafood industry and the global nature of many supply chains. They wanted Seafish to be more of a specialist, independent “go to” source for information on all seafood and sustainability, promoting consumption of seafood through generic marketing (particularly around the health messages) and proactive management of “fish: the brand”. For them, the consumer facing work was important.

Exporters generally did not feel that Seafish’s current strategy offered them much benefit.

A unifying theme was that Seafish should be a source of credible information, be that about fish, sourcing, sustainability, economics, market data, legislation or labelling.

Across the respondents, several wished to see more specific and focussed objectives and to better understand how they related to Seafish's activities. There was broad support for the idea of setting objectives on a more sectoral basis to be clearer about how Seafish's work benefits different groups.

The majority of respondents supported the idea that strategic objectives should be set at a UK level and of these, over three quarters thought that the objectives should then be tailored to local regional or sectoral issues[6]. Those supporting a sectoral approach highlighted the different demands of Seafish from the import / processing and catching / exporting sectors.

There were mixed responses as to whether Seafish has an effective engagement strategy with industry with several respondents feeling well engaged. Generally those who felt less engaged were also less supportive of Seafish as an organisation. Others recognised that there was a "two-way street" and that they had not done much to engage with Seafish themselves.

The need for greater transparency about Seafish's activities and how priorities are agreed were other common themes.

3.3. Funding and the levy

There was overwhelming support for Seafish to continue to be funded by a statutory levy[7].

Many of those supporting a statutory levy believed that this is the most equitable way to fund Seafish particularly as it was seen as the only way to prevent "free riders"[8].

Consideration to a voluntary levy was given at some of the workshops and in a handful of written responses. This was balanced by views of others who thought a voluntary levy was impractical, would make Seafish indistinguishable from a trade association, or would make the funding uncertain.

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[6] Of the 101 respondents who answered this question, 83% supported setting objectives at an over-arching UK level with 80% of these respondents going on to support tailoring these to local sectoral / regional needs.

[7] Of the 107 respondents who answered this question, 90% were in favour of a statutory levy and 3% stated they would be willing to consider options for a voluntary levy. Others gave comments on the issue but did not state a preference.

[8] i.e. those who do not pay the levy but benefit from the services provided by Seafish

There were also a few who thought that Seafish ought to consider alternative / commercial sources of funding, although several stated that Seafish should be free to carry out services on a commercial basis in addition to the levy.

Views on rebalancing the levy rates across species were mixed. Fairness was key for many and so there was some support for ensuring that each species paid proportionately the same. In general, the pelagic sector was less keen on rebalancing, particularly if this led to an increase in the rate of levy they paid.

There was considerable support, particularly from attendees at the workshops from those covered by the current levy regime, for extending the levy to cover salmon and freshwater fish (again to address the “free-rider” issue). A few went further and wanted it expanded to any protein sources coming from water. A few noted that at the retail / consumer end, “fish is Fish” so there should be fairness in the application of the levy (i.e. it should be applied across all species).

However, this support for extension of the levy was not universal with some strong opposition particularly from the written responses. Representatives from the salmon and trout industries in particular did not generally support extension of the levy. Views from processors dealing with mixed fish were varied. Several aquaculture based groups also highlighted the differing needs of aquaculture production and wild capture fisheries stating that Seafish would not be equipped to deal with these issues.

There was no real consensus on changing levy rates. However, there was a strong message, particularly from the larger levy payers but supported by others, that Seafish should first identify what the industry needs to be done; secondly identify whether it is appropriate for Seafish; thirdly establish how much this will cost; and only then establishing what levy rates were appropriate. There were strong views that Seafish should not plan activities in order to spend the £8 million of current levy receipts. A number emphasised the need to consider the value of and benefit to the industry for the money spent as part of clear financial planning. The suggestion that the levy be raised on an ad valorem basis was raised at several of the workshops.

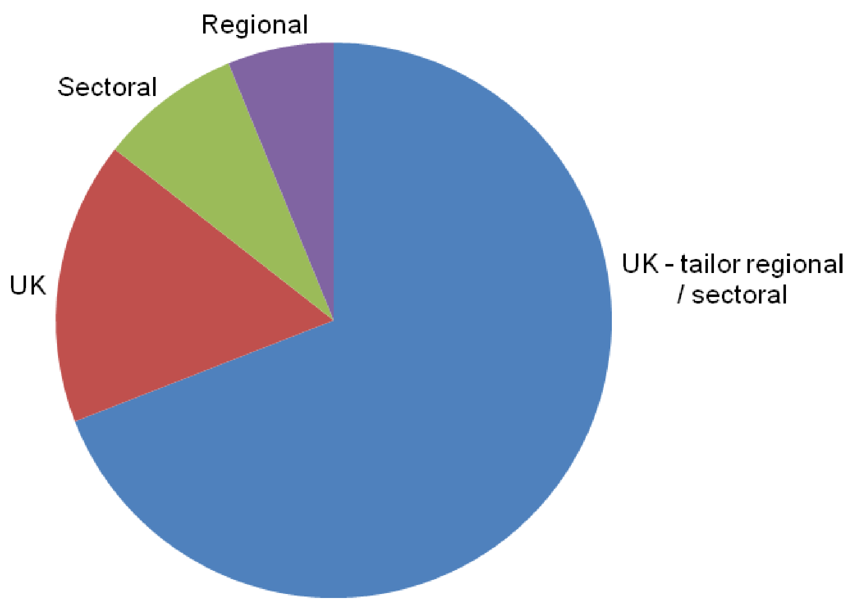
The written responses to the discussion also highlighted the ongoing tension which Seafish faces between those who pay the levy directly and those who do not, whereby those who pay the levy believe that rates should be lower with expenditure clearly reflecting where the levy is raised.

Finally, there was a general message that neither the amount of levy raised, nor how it was spent was transparent.

3.4. Organisational structure and governance

Overall the majority of respondents thought that Seafish still had a role at a national level and there was widespread support for Seafish continuing to set objectives at a UK level. There was also a clear steer to ensure that these reflected local needs, either on a regional or sectoral basis, as shown in the chart below.

Basis on which Seafish objectives should be set[9]



On the structure for delivering these objectives, the majority supported the "hub and spoke" model (closest to the status quo). This was not only because it did not introduce new costs, but also because it could be sufficiently flexible to allow Seafish to reflect regional and sectoral priorities. There was recognition, particularly at the workshops, that within this, a sectoral approach might lead to more transparent costs and values of activities.

There was little support for the centralised model as it was thought it would not be able to reflect local differences sufficiently, although a handful of the larger processing companies favoured this approach.

There was some support for a decentralised model but others thought it would lead to duplication of services and inefficiencies.

There was little support for the devolved model, cost or efficiency implications being cited as an issue (because of duplication of services and spreading resources too thinly) and the potential for lack of consistency. Some recognised that arguments about

[9] Based on 97 respondents

proportionality of levy spend might mean that particular areas / regions would receive less than they do currently. Others felt that some areas / regions were receiving a disproportionately large benefit and this should be addressed. Strong messages came primarily from the processing sector that many of the issues facing the seafood industry were global (e.g. sustainability) or national (e.g. relating to consumers).

Combinations of various models were also suggested.

In Northern Ireland, there was strong support for the dedicated NI post to continue and there was a general feeling that positive and real change had been brought about as a result of this post.

In Wales, there was strong support for a similar dedicated post to be introduced.

In Scotland, there was general support for the work of Seafood Scotland, but responses from across the UK demonstrated a real lack of understanding of the relationship between Seafood Scotland and Seafish, and Seafood Scotland's role. Accountabilities and source of funding were similarly not understood.

3.5. The Seafish Board

The general consensus was that there was no specific need to reduce the size of the Seafish Board. However, the key theme was that the Board needed to reflect the diversity of the industry across the supply chain and calls were made for retail, aquaculture, fisheries science, food service and individual species industries to be represented. Concerns were expressed that some sectors were not represented or that others were over-represented.

Further calls were made for transparency, for the Board to have meaningful debates and a visible mandate. There was a lack of understanding of how the Board was appointed (in terms of the public appointments process), what the role of Board members is and a concern that members are appointed on the basis of merit.

There was support for the removal of the convention for geographical representation of Board membership but this was not unanimous.

There was also a desire for the industry to have more direct influence into determining the direction and strategy of Seafish. A handful of responses suggested that Seafish consider having two boards to separate strategic and operational matters.

4. Ministers' response: next steps

Following consideration of the views expressed in this discussion and in the Cleasby Review, Richard Benyon (Parliamentary Under-Secretary for Natural Environment and Fisheries), Richard Lochhead (Cabinet Secretary for Rural Affairs and the Environment, Scottish Government), Michelle O'Neill (Minister for Agriculture and Rural Development, Northern Ireland Executive) and Alun Davies (Deputy Minister for Agriculture, Fisheries, Food and European Programmes, Welsh Government) have agreed to take the following actions:

1. To retain Seafish

In response to the view that the industry (diverse as it is) believes there is a valuable role for an organisation like Seafish, Ministers have agreed that Seafish should continue, subject to Government triennial review policy for Non Departmental Public Bodies (NDPBs). Seafish's first triennial review is scheduled for early 2014.

Ministers agree with the message from significant proportions of industry that while Seafish has tried to become more responsive in recent years, further and transformational change is needed including the steps set out below.

Minsters' longer term aspirations for Seafish remain as outlined in the discussion document.

2. To retain a statutory levy to fund Seafish but to conduct a further review and full consultation on the rates of the levy in late 2012

The industry believes a statutory levy remains the fairest way to fund an organisation whose objectives span the diverse industry. Ministers have therefore agreed that Seafish should continue to be funded by a statutory levy.

To raise a statutory levy, Seafish must continue under its current constitution as a Non Departmental Public Body (NDPB). In retaining its status as an NDPB, Seafish will be required:

- to focus on the benefit being provided to the UK industry for the public money it collects and spends;
- to deliver value for money;
- to ensure it is complying with the relevant Government guidance for NDPBs, for example on the management of public money;
- to undergo normal routine Government scrutiny, including a triennial review process;
- not to lobby the Government (it can however provide factual advice).

Whilst there was support for a levy to fund Seafish, respondents were concerned about the transparency of how the levy is spent. Ministers will therefore expect Seafish to be more transparent about its funding sources, spending and activities.

Ministers agree that Seafish needs to become more responsive to industry and to the suggestion that it should define its priorities before agreeing a budget. Ministers also acknowledged the importance of ensuring the levy is collected on a fair basis and note that a review of levy rates has not been undertaken in the last decade.

Ministers have therefore agreed that Seafish should draw up a revised and fully costed corporate plan by early Autumn 2012. Following this, a formal consultation on new levy rate regulations will be launched.

It was always recognised that expanding the levy to cover additional species, if indeed considered desirable, is a longer term project that would require a full impact assessment and consultation on amendment to the Fisheries Act 1981. Ministers will consider the responses further before making any further announcements.

3. **To restructure the Seafish Board to provide greater industry input to and responsibility for Seafish's strategy**

The industry was clear that it wants more influence over Seafish's priorities but there was little consensus over what those priorities were. Each sector of this diverse and complex industry wants Seafish to do more for them. Many saw the membership of the Board as the way to achieve this.

Given the diversity of the industry and the framework in which public appointments must be made, it is not possible for every sector and interest group to be represented on the Board. Indeed, the Board has the statutory duty to act in the interests of the industry as a whole.

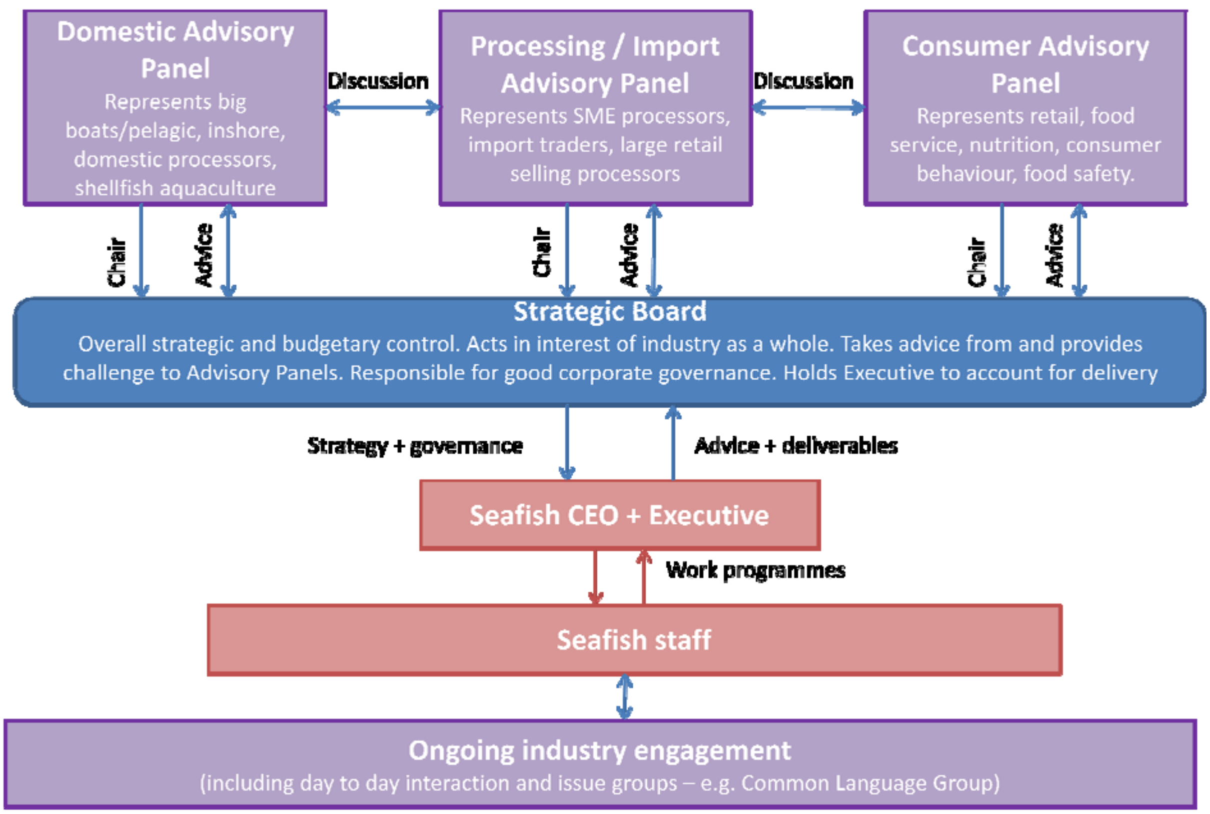
In recognition of both the desire for Seafish to be more responsive to industry, sectoral or local need, Ministers have agreed a new Board structure.

At strategic level, a Board of between 7 and 9 is to be appointed (the final number to be determined on the merit of the applicants). The Strategic Board will be funded by the Fisheries Administrations (as required under the Fisheries Act 1981). The Chair, Deputy Chair and two members will need to be independent (in terms of financial or commercial interest) of the seafood industry. The remaining members will represent the interests of the catching, processing, retail/consumer sectors at senior, strategic level. The intention would be to ensure the Board membership also reflected the geographical spread of the seafood industry across the UK. Appointments will be on merit and be made in accordance with the Commissioner for Public Appointments' Code of Practice for Ministerial Appointments to Public Bodies.

An appointment process for the Deputy Chair and up to 7 members is underway with a view for the new Board to be in place from 1 April.

Ministers have asked the current Chair, John Whitehead to continue in his position until 31 December 2012, to which he has agreed. This will provide continuity and better allow the current Board to support the transition. An appointment process for the Chair will begin in the summer.

Below the Strategic Board, in order to expand the representation and influence of industry, Ministers have asked Seafish to establish three panels (representing (i) domestic / catching sector, (ii) import / processing sector and (iii) the consumer / retail / food service sectors). The panels will provide the Strategic Board with agreed priorities for their sector, recognising the differences which may exist at a local or regional level.



Seafish will work with industry to determine the structure and the method of appointment to these panels, the costs of which will met from the levy. The Chair of each panel will attend the Strategic Board to further strengthen industry input into the decision making process.

In Scotland, the recently-established Scottish Seafood Partnership has brought together all sectors of the seafood industry to provide a collective voice for the industry and agree priorities for supporting and improving its operations. The Partnership, on which Seafish is represented, is intended to provide an authoritative source of advice for setting the priorities for the Scottish industry. As such, effective means will need to be established by which its views and those of other regional initiatives are best reflected within the new Seafish structure and its actions.

The Strategic Board, acting in the interests of the industry as a whole, will need to balance the sectoral and regional / local demands as they help steer Seafish's corporate strategy and agree their budget. It will also have to ensure good corporate governance and hold the Executive to account for delivery.

Both the Strategic Board and the Panels will be expected to operate in a transparent and accountable way, allowing the industry to develop a mature approach to balancing different needs. With increased influence comes greater responsibility for the industry for Seafish.

4. For Seafish to develop a new corporate plan by September 2012 using the new Advisory Panel structure to engage the industry

The first priority for the new Board and Panels will be to develop, with the Executive, a new corporate plan, and make proposals to the Fisheries Administrations on changes to the levy rates.

Seafish's status as an NDPB means that it must tread a careful balance between delivering industry's priorities, and using public money effectively and transparently. In many instances, Seafish will be able to carry out activities which benefit both industry and Government. However, as an NDPB, Seafish must not carry out activities which are contrary to, undermine or conflict with Government policy. Ministerial approval of Seafish's corporate plan will therefore be required in autumn 2012.

5. To retain Seafish's structure largely as it is: a hub of expertise with clear delivery throughout the UK

In recognition of the clear messages about delivering value for money, but wanting an organisation that has a level of expertise that can deal with global or cross-cutting issues, and is responsive to sectoral or local issues, Ministers have agreed that Seafish should remain, for the time-being, as a UK organisation (while retaining their longer-term aspirations as outlined in the discussion document).

Where specific support is needed, staff can be employed locally or in Seafish's headquarters.

In response to the lack of understanding about the relationship between Seafish and Seafood Scotland, Ministers have asked for increased transparency and that the responsibilities and lines of accountability between the two organisations are clarified.

5. Annex A: Summary of discussion questions

The rationale for Seafish

Question 1: Do you think the industry continues to need a body such as Seafish?

Question 2a: If you do think such an organisation is still required; should it work to help deliver Government objectives as well as industry priorities? and

Question 2b: should it position itself as “the authority on seafood” on behalf of the industry?

Seafish’s corporate strategy

Question 3a: Do you agree with these outcomes, strategic objectives and workstreams for Seafish?

Question 3b: Are there objectives or outcomes which you would like to see included?

Question 4: Should strategic objectives continue to be set at UK level or should priorities be set on a on a sectoral basis or across the four Administrations?

Question 5: Do you think Seafish has an effective engagement strategy with industry to define its activities and priorities?

Question 6: Do you find the range of activities undertaken by Seafish useful (bearing in mind they might not all be relevant to you)?

How much should Seafish invest to achieve its aim?

Question 7: In your view should the levy - at whatever level - remain statutory, or should it be changed in any of the ways outlined?

Question 8: Do you think the current distribution of investment across Seafish’s activities is appropriate? If not, how should it change?

Question 9: Should the range of species to which levy is applied be expanded to include freshwater species such as salmon and pangasius?

Question 10: Do you think there is a need to change the current levy rates?

The Seafish organisational structure and governance

Question 11: Which structural / constitutional model best allows Seafish to meet the objectives and outcomes outlined above, bearing in mind structural / constitutional change will have cost and delivery implications?

The Seafish Board and Board membership

Question 12: Do you think there is a need to reduce the size of the Seafish Board?

Question 13: Do you agree with the proposal to remove the convention for geographical representation of Board membership?

Question 14: Do you have any comments on the role descriptions for the Chair, Deputy Chair and ordinary Board members set out in Annex E?

6. Annex B: Summary of workshops

A summary of each of the nine events held across the UK is given below.

Cardiff

There were nine attendees including representatives from the aquaculture, catching and exporting sectors. Three of the attendees were Seafish levy payers.

- The overall consensus from the attendees was that there was a need for Seafish or a similar body. However, it was clear that Seafish could do better to communicate its activities to stakeholders.

- On governance, there was some discussion on Board members needing to have appropriate knowledge of the industry including sectors and regions. There was an appreciation that the geographical selection criteria would restrict the field.

- On funding, there was widespread support for a statutory levy. It was considered that a voluntary levy would not have the same benefits to the industry. There was support for expanding the levy to salmon and pangasius and to consider how much these industries were benefiting from Seafish, especially as these were no longer infant industries. There was some support for rebalancing the levy. Opinion was against raising the levy but not particularly supportive of lowering it either. Attendees wanted to see the benefits received in Wales for the money spent.

- On strategy, attendees sought clarification about what Seafish did. There was general support from those who had used Seafish. There was a call to see a Seafish person in Wales to act as an enabler and to help local industry link into Seafish activities. It was considered that there was room for this within the UK-wide objectives.

- On structure, the overall consensus from the attendees was for option 2, the hub and spoke model. There was preference for this with a Welsh regional representative. The decentralised model was also considered. It was thought that a centralised model would not be able to reflect local differences sufficiently. There was concern about the cost implications of a devolved model and a request for further information on this. Also, the value for money of this model was questioned.

Glasgow

There were seven attendees including representatives from the catching and training sectors, Seafood Scotland and two managing directors from large west coast catching and processing businesses. Two of the attendees were Seafish levy payers. The meeting was fairly controlled and questions discussed in order.

- The meeting was overwhelmingly positive about the need for a body like Seafish but wished to see more of its people and know what they were doing. However, this was countered by one participant saying that there was just as much onus on the industry to go to Seafish as on Seafish to go to the industry. There was division over whether to set priorities at UK level or on a sectoral basis or across the four administrations. Most attendees favoured a sectoral basis.

- Support for consumer work was expressed. The importance of safety training was also raised and the need to do more, not only on training, but also recruitment into the industry. The sustainability of the industry was seen by one attendee as two pronged: by eating more fish one employs more people and creates a sustainable industry.

- There was overall support for the status quo regarding structure. Strong preference was expressed for the hub and spoke model and even stronger opposition to the devolved model, particularly as recognition that splitting the levy would essentially mean Scotland would receive less than it did now.

- There was general support for a statutory levy. The levy questions did not raise much input. One attendee asked the Seafish representatives as to whether they needed more or less money to do what they wanted and if there was a real stimulus for change. Another attendee suggested that more of a commissioning model would help wider targeted engagement in projects the industry wanted.

- There was general support for bringing salmon into the levy but recognition that the salmon industry would resist this. It was pointed out that they pay a 'levy' in the form of a membership fee to the Scottish Salmon Producers' Organisation which is higher than Seafish levy rates but considered by them to be of greater value for money as it is solely spent on salmon. One attendee argued against trout being brought in.

- The consensus from all present was that the convention for geographical representation of Board membership should be removed. There were several comments that there was no need to reduce the size of the Board. One attendee wished he understood the current skill sets of the Board better. There was concern that some sectors were not represented and a call for trade associations to nominate candidates. There was a desire for the mandate of the Board and its members to be set out somewhere for all to see. There was a suggestion for representation by species. Comment was made that industry representation should only be one facet: the Board must have a wider view and corporate skills.

Plymouth

There were 12 attendees including representatives from the catching, exporting, processing and training sectors, and a Non Departmental Public Body. Three of the attendees were Seafish levy payers. The meeting was dominated by the interests of the catching sector and there was a strong desire for a regional approach.

- The general consensus from the room was that yes, Seafish was needed, though it did need to change.

- The majority wanted Seafish to do more for the catching sector in the fields of safety, technical support and information.

- Seafish was criticised about the amount of money it spent on consumers: informing them and balancing out some of the Non-Governmental Organisation (NGO) input was fine but there was more scepticism about promoting consumption.

- The hub and spoke model was the most popular, with more of a regional focus and a focus on the South West region. There was some feeling that devolution was a “done deal” and Seafish should be devolved so that England had a voice. There was also a call for Defra to match Seafish’s funding.

- There was universal support for a statutory levy and majority support for expanding the levy to include salmon and pangasius. There were mixed views about whether Seafish’s overall levy income should go up or down. One suggestion was made that they needed to look for alternative sources of funding.

- On Board and governance, there was some support for a smaller, more strategic, independent Board that took advice from industry committees. Otherwise, a desire for more transparency about the Board, for it to have meaningful debates but no real consensus.

Grimsby

There were 22 attendees including representatives from the catching, fish frying, and training sectors, and large importing and processing companies. Seven of the attendees were Seafish levy payers.

- There was overall support for the work that Seafish did and wide ranging praise for its activities and staff. There was a general consensus that the industry continued to need a body such as Seafish to represent the industry as a whole.

- Several attendees were particularly emphatic in their support for the UK focus of Seafish and for the focus on the consumer activities but that this focus should be on the core messages around health. A view was expressed that it seemed Seafood Scotland benefitted disproportionately from the levy money raised by Seafish. It was suggested that safety training be moved away from Seafish’s remit and to the Maritime and Coastguard Agency and Health and Safety Executive.

- Most attendees favoured the hub and spoke model and there was little support for a centralised model. There was a clear steer away from a more decentralised approach and if this were to happen, the proportion of levy collected in the various locations should be taken into account. It was queried how a more decentralised or devolved model would avoid duplication and if this was already an issue with Seafood Scotland. There was one suggestion for a hybrid between hub and spoke and decentralised model.

- There was unanimous support for retaining a statutory levy and many supported the levy being expanded to include salmon and all products taken from the sea within an overall lower levy. A view was expressed that Seafish should decide what to do and then determine the budget and not the other way around.

- The discussion around the Seafish Board and governance centred around the skills on the Board. There was a general consensus supporting the proposal to remove the convention for geographical representation of Board membership and that the representation of sectors, not regions, was most important. There was a call to do more and better to advertise Board posts to a wider group in order to encourage more people to apply.

London

There were 15 attendees including representatives from the catching, fishmonger training, importing and processing sectors, and trade associations representing shellfish, processors, frozen fish and retail sectors. Three of the attendees were Seafish levy payers.

- There was very positive support for a body like Seafish, the work that it did and unanimous support for a statutory levy.

- On Seafish's corporate strategy, there was discussion around its objectives and the need to keep it UK wide and consumer focused. It was emphasised that Seafish was for the seafood industry in the UK and not just the catching sector. There was emphasis on the need to look at what Seafish should be doing and then set the budget accordingly. Also, on the need to be more transparent about what the sources of funding were are and how that funding was being spent. One attendee raised the issue of the need to consider fish issues within the wider food context.

- There was unanimous opposition to a devolved model. There was general support for a centralised model mixed with a hub and spoke model. Also, some support for a sectoral model but certainly within a UK core.

- There was a swell of support for changing the levy rates by reducing them but bringing in all types of aquaculture fish and salmon on the basis that it should be more equitable as the current status gave unfair advantage to freshwater aquaculture and salmon sold in UK. Current legislation was considered to be out of date with the consumer and industry of today.

- There was a call for the Board structure to follow the organisational structure of Seafish and that perhaps the Chair should decide on the size of the Board depending on the skills and knowledge available. There was unanimous agreement with the proposal to remove the convention for geographical representation of Board membership. A view was expressed that a retail perspective was crucial for the work that Seafish did.

- It was suggested that perhaps there was a role for Seafish in overseas trade missions. There was some discussion that the ‘authority on seafood’ was not quite the correct reflection of where Seafish should position itself but recognition that the intention was more or less correct.

Newcastle Co. Down

There were 22 attendees including representatives from the catching, processing, producing, and training sectors, and two producer organisations. Seven of the attendees were Seafish levy payers.

- There was support for a body such as Seafish. There was also recognition of an improvement in the visibility of Seafish and its activities now that there was a dedicated NI post. There was strong support for this to continue and potentially expand to bring in more specific local involvement. There was a general feeling that real change had been brought about by the NI Seafish post and that this change had been positive. However, Seafish was still quite new to NI industry and therefore, industry was still working through what Seafish could do for them.

- There was some support for a statutory levy and general support for expanding the levy to include all species. However, some attendees pointed out that the issues faced by their industry were very different and that there was a difference between growing and catching fish. One attendee called for ad valorem to be considered again.

- On Seafish structure, there was no desire for a devolved body and the meeting was largely supportive of a hub and spoke model with continued focus on work that is in NI. There was a belief that the return to NI industry was best maximised by being part of a UK body providing some pan-UK services. There was one call against ring-fencing funds to the region but for funding to be allocated on merit.

- On Seafish Board and governance, there was strong support for keeping an NI Board member to represent the industry. Also, agreement that merit and knowledge of the seafood industry were very important factors.

Edinburgh

There were 17 attendees including representatives from catching, distributing, importing, large processing companies, shellfish aquaculture, training, trade associations representing the frozen at sea, fish frying sectors, the trout and salmon industry, trade press and a Non Departmental Public Body. Two of the attendees were Seafish levy payers.

- There was unanimous support for a body like Seafish to continue and for a statutory levy to fund it.

- A discussion on Seafish having a UK or regional focus was split: the catching-focussed representatives wanted more help to sustain the catching sector with a focus on the industry in Scotland; the processors and importers representatives wanted Seafish to have a UK-wide, customer focus.

- Although there was a body of support for a more regionalised focus to support Scottish catchers, this did not follow through to specific support for a devolved body. There were requests for clarification over the role of Seafood Scotland and the newly formed Scottish Seafood Partnership. There was support for a centralised model with some sectoral focus.

- There was majority support for expanding the levy to cover all fish including salmon. However, one attendee stated that the salmon industry believed they were best served by a salmon-specific organisation (which already existed). There was no particular discussion around the rates of the levy, more of a focus on determining the needs of the industry and then setting how much was needed to fund it.

- The discussion on Seafish Board and governance focussed on the representation of various parts of the industry. There was a general feeling that the Board was not currently too big. There was a suggestion that aquaculture should be one of the specific knowledge sets sought and a fisheries science expert would be very useful.

Aberdeen

There were 37 attendees including representatives from the catching, processing and training sectors, and Aberdeenshire Council. 14 of the attendees were Seafish levy payers.

- There was general support for an organisation such as Seafish. However, there was a general consensus that Seafish did not have an effective engagement strategy with industry to define its activities and priorities. Although several noted their dissatisfaction with the visible outputs of Seafish, these people did speak favourably of specific services provided by Seafish and of improvements made recently. The meeting was generally supportive of the work that Seafood Scotland did but there was a lack of understanding of the relationship between Seafood Scotland and Seafish.

- There was general agreement that in order to achieve any benefits, the levy should be statutory and it should be expanded to include all species. There were several calls of “fish is fish”. There was general consensus that salmon should be included. It was also agreed that first Seafish should decide what to do and then how to fund it. It was suggested that ad valorem levy rates be considered again.

- On structure, there was varied support the hub and spoke and decentralised models but no support for the centralised model. One or two attendees were in favour of a fully devolved model and requested further details on the cost of this. There was a request for greater clarity about Seafood Scotland's funding and its relationship with Seafish. It was said that greater visibility was needed on what the levy was being spent on and getting impact for levy spent was the most important thing.

- On Seafish Board and governance, several points were made about the shape of the Board dependent on the type of model. There was a request for food service to be represented and a general lack of support for removing geographical representation overall.

London summary discussion

There were eight industry attendees including senior representatives from the catching, importing and processing sectors.

- There was consensus that the industry continues to need a body such as Seafish. There was one call for Seafish not to do Government business and another that it should position itself as "the authority on seafood" on behalf of the industry, building its credibility to this claim.

- In terms of priorities, the catching sector representatives felt Seafish needed to reconnect with the catching sector, prioritise training, support for business and continue its work in gear technology. Processing sector representatives said that priority had to be the consumer, to build attractiveness into the category, increase sales and promote fish as a brand and that Seafish's activities must reflect the relative contribution of the catching and processing sectors to the overall economy.

- There was general support for the need for Seafish to deliver better value for the money it spends and to focus more clearly on delivering specific benefits. There was a call from a minority for the levy to be significantly reduced.

- The majority of attendees supported the expansion of the levy to include other species. The main reason given was that it would be fairer in the marketplace, spread the burden across all and possibly lead to lower levy rates. Those opposed raised the differences between aquaculture and wild capture industries.

- On Seafish's organisational structure and governance, representatives from both the catching and processing side could see merit in exploring the sectoral model further as they recognised the differing demands between their sectors. There was discussion that the consumer-angle is the one which unites the whole industry.

- The Seafish Board and Board membership was not discussed at this meeting.

7. Annex C: List of respondents

A list of organisations represented at workshops and in writing is included in the table below. In addition 47 commercial fishermen responded in writing and two attended the Plymouth event whose names have not been disclosed in this list in the interests of data protection.

Organisation	Workshop where represented	Written response received?
A Thompson Jnr	Aberdeen	
Aberdeen Fish Producers	Aberdeen	
Aberdeenshire Council	Aberdeen	Yes
Aquaculture Initiative	Newcastle Co. Down	Yes
Andrew Christie Jnr Ltd.	Aberdeen	Yes
Anglo-North Irish Fish Producers' Organisation (ANIFPO)	Newcastle Co. Down	
Ashtons Fishmongers	Cardiff	
Ashvale Restaurants	Aberdeen	Yes
Association of Scottish Shellfish Growers (ASSG)	Edinburgh	
Bamboo Revenue	Glasgow	
BHJ Seafood	Grimsby	
Birds Eye Iglo Ltd.	London	
British Frozen Food Federation (BFFF)	Grimsby/London	Yes
British Retail Consortium (BRC)	London	
British Trout Association (BTA)	Edinburgh	Yes
Burgons	Edinburgh	
C&N Chambers	Newcastle Co. Down	
Caladero	Aberdeen	
Campbell Brothers	Edinburgh	
Cardigan Bay Fishermens Association	Cardiff	Yes
C-Fish Selling	Newcastle Co. Down	
Cloughmore Shellfish Ltd.	Newcastle Co. Down	
Coombe Fisheries, Barnstaple		Yes
Countryside Council for Wales	Cardiff	Yes
Cross Border Aquaculture Initiative	Newcastle Co. Down	
Cumbrian Seafoods Limited	Grimsby	Yes
Cywain / Menter a Busnes	Cardiff	
Daily Catch Seafood	Newcastle Co. Down	
Dawnfresh Seafoods Limited	Glasgow	Yes
Deep Dock Ltd.	Cardiff	
Denholm Fishselling	Newcastle Co. Down	
DH Clark	Aberdeen	
Downies of Whitehills	Aberdeen	

Enterfoods	Aberdeen	
Erne & Melvin Enhancement Co.		Yes
FAL	Aberdeen	
Fastnet Fish	Grimsby	Yes
Fish Industry Training Association (Highlands & Islands) Ltd.	Aberdeen/Glasgow	
Fishmongers Company	London	
Fishupdate.com	Edinburgh	
Food and Drink Federation (FDF)	London	Yes
Frozen at Sea Fillets Association (FASFA)	Edinburgh	Yes
Glen Oak Fisheries	Newcastle Co. Down	
GMR Seafoods	Aberdeen	
Grimsby Fish Dock Enterprises Ltd., Grimsby Fish Market and Port of Grimsby East	Grimsby	Yes
Grimsby Fish Merchants Association Limited (GFMA)	Grimsby	Yes
Grimsby Institute	Grimsby	
GT Seafoods Ltd.	Aberdeen	
HBA	Aberdeen	
Herring Buyers Association		Yes
Hook Marine Ltd.	Glasgow	
Humber Seafood Institute	Grimsby/London	Yes
Institute for Archaeologists		Yes
J Charles Fish Merchants	Aberdeen	
J. Sykes & Sons (Manchester) Limited		Yes
Joint Nature Conservation Committee		Yes
John McAlister Oban Ltd.	Glasgow	
Joseph Robertson	Aberdeen	
Klondyke F.P.O.	Aberdeen	Yes
Lankford & Sons Fishing Ltd.	Plymouth	Yes
Le Lein	Edinburgh	
Llyn Fishermans Association		Yes
Lyons Seafood	London	
Macduff Shipyards Limited		Yes
MacRae Foods	Aberdeen	
Macrae/Youngs	Edinburgh	
Maritime and Coastguard Agency		Yes
Middleton Seafoods	Newcastle Co. Down	
Midlands Seafish Industry Training Association (MSITA)	Grimsby	Yes
Moray Seafoods	Aberdeen	
Mourne Seafood Bar	Newcastle Co. Down	
National Federation of Fish Fryers (NFFF)	Cardiff/Edinburgh/ Grimsby/Newcastle Co. Down	Yes

National Federation of Fishermen's Organisation		Yes
National Federation of Fishmongers Ltd. (NFF)	Aberdeen/London	Yes
National Lobster Hatchery	Plymouth	
Natural England		Yes
Nesco Weighing	Grimsby	
New England Seafood		Yes
Nolan Seafoods (UK) Ltd.	Aberdeen	
North East Lincolnshire Council	Grimsby	
North East Lobster Co-Op	Newcastle Co. Down	
North East of Scotland Fishermen's Organisation		Yes
North Wales Fishermen's Co-operative Limited		Yes
Northern Ireland Fish Producers' Organisation (NIFPO)	Newcastle Co. Down	
Ocean Fish and Riddlers	Plymouth	
Ocean Trawlers Europe Ltd.		Yes
Oceanwide	Grimsby	
Oneida Viviers Ltd.	Cardiff	
Otterburn Trout Farm		Yes
Peterhead and Fraserburgh Fish Processors Association (PFFPA)	Aberdeen	Yes
Pit-Stop Fast-Food Northern Ireland	Newcastle Co. Down	
Plymouth Area Business Council	Plymouth	
Prime Seafoods	Aberdeen	
R&D McDonald	Aberdeen	
Rooney Fish	Newcastle Co. Down	Yes
Royal National Lifeboat Institute (RNLI)	Glasgow	
Royal National Mission to Deep Sea Fishermen (RNMDSF)	Plymouth	
Scallop Association (Scottish Committee)		Yes
Scampi Processors Association Northern Ireland	Newcastle Co. Down	
Scottish Aquaculture Research Forum		Yes
Scottish Enterprise	Edinburgh	
Scottish Fishermen's Federation	Aberdeen	Yes
Scottish Fishermen's Organisation (SFO)	Edinburgh	Yes
Scottish Natural Heritage		Yes
Scottish Pelagic Fishermen's Association	Aberdeen	Yes
Scottish Salmon Producers' Organisation (SSPO)	Edinburgh	Yes
Scottish Seafood Association	Aberdeen	Yes
Scottish Seafood Processers Association		Yes
Scottish Seafood Training Association (SSTA)	Aberdeen	
Scottish Shellfish Marketing Group (SSMG)	Glasgow	
Scottish White Fish Producers Association	Aberdeen	Yes

Limited (SWFPA)		
Seachill (Division of Icelandic Group UK Ltd)		Yes
Seafish Industry Training Authority (SIFTA)	Newcastle Co. Down/ Plymouth	Yes
Seafood Cornwall	Plymouth	
Seafood Cornwall Training	Plymouth	
Seafood Shetland (incorporating Shetland Fish Processors and Shellfish Growers)		Yes
Seafood Training	London	
Seafox	Grimsby	
Seahawk Marine Foods Ltd		Yes
Sealord	Grimsby	
Seavision UK	London	
Shellfish Association of Great Britain (SAGB)	London	
Shetland Catch Ltd.		Yes
Shetland Fisheries Training Association		Yes
Shetland Fish Producers Organisation Ltd.		Yes
Shetland Oceans Alliance (SHOAL)		Yes
Smales and Son	Grimsby	
South Devon & Channel Shellfishermen Ltd.		Yes
Stirling Management School, University of Stirling		Yes
Subaquaculture	Newcastle Co. Down	
The Grower, newsletter of the Association of Scottish Shellfish Growers	Edinburgh	Yes
UK Fishmeal	Aberdeen	Yes
Welsh Fishermans Association	Cardiff	Yes
Welsh SI GTA	Plymouth	
Western Training Association	Plymouth	
Westminster Kingsway College	London	
West of Scotland Fish Producers Organisation		Yes
Westward	Aberdeen	
Whitby and District Fishing Industry Training School	Grimsby	
Whitelink Seafoods	Aberdeen	
Wilsea Ltd.	Aberdeen	Yes
WOSSTA Training	Edinburgh	
Young's Seafood Limited	Grimsby	Yes