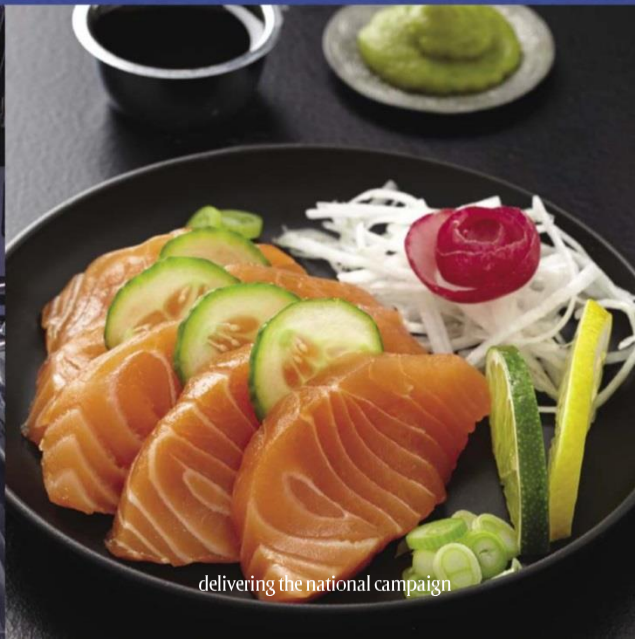


CHANGING TIDES



A strategy for Scotland's seafood industry



delivering the national campaign





ABOUT US

Set up by the industry, Seafood Scotland are a small and busy team working to increase the value of return to the Scottish seafood sector through trade marketing promotion and business development support.





AN ACTION PLAN FOR 2030

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

In 2017, Scotland Food & Drink set out its Ambition 2030 strategy to double the value of food and drink to £30bn by 2030.

Our Action Plan focuses on Four Key Themes:

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





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

Profitable

Collaborative

Diverse

Admired



RIGHT HERE, RIGHT NOW

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.

466,000 tonnes
of fish landed by
Scottish registered vessels (2017)¹



188,000 tonnes
of seafood farmed in Scotland²



Landings by Scottish
registered vessels worth
£560 million
(2017)³

64%
Scottish fleet's share of total landings
by UK vessels⁴



2,065
active Scottish-based vessels
in 2017 – +32 on 2016⁵



150+
seafood processing sites and
8,380
processing jobs in Scotland⁶



12,000+
jobs in aquaculture
in Scotland (incl supply chain)⁷



RIGHT HERE, RIGHT NOW

WHAT'S WORKED WELL FOR THE INDUSTRY	OUR CHALLENGES AND UNCERTAINTIES
Quality and improving consistency of the wild-catch through, e.g., shorter trips, improved handling	Financial strength of competitors, and uncertainty of funding to promote Scottish seafood
Increased number of independently-verified sustainable fisheries in our waters	Greater supply chain interaction and innovation needed
Ambition across the industry – from investment in boats to processors seeking to innovate and automate	Skills and labour shortages
Reputation of Scottish seafood, based on provenance and quality	Availability of processing capacity to handle our raw materials and add value
Commitment to high standards – e.g. more processors achieving BRC/SALSA status	Low margins and the ultra-competitive nature of the retail market
Collaboration culture emerging	Desire for more enabling regulation
Strong demand domestically and internationally for seafood	How to get UK consumers eating more fish
Financial and policy support provided by the Scottish Government e.g. EMFF, National Export Plan; Investment in infrastructure	How to create an environment where businesses can thrive and attract investment
Growing consumer awareness of health benefits of fish	Post-Brexit uncertainty about access to raw materials, key markets and quotas



18 STEPS FOR GROWTH – MARKET DEVELOPMENT & BRAND

MARKET DEVELOPMENT & 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
2. Facilitate growth with market intelligence and practical support
3. Offer businesses greater support to navigate the commercial landscape
4. Use standards and accreditation to support marketing and improve business performance



18 STEPS FOR GROWTH – INVESTMENT & INNOVATION

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 availability to generate investment
6. Create an enabling environment for businesses
7. Ensure access to innovation support for seafood businesses, and look at automation opportunities
8. Design new funding support for innovation and growth post-Brexit



18 STEPS FOR GROWTH – PEOPLE & SKILLS

PEOPLE AND SKILLS

Today and tomorrow, in 2002 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
10. Develop a leadership programme for the seafood industry
11. Incorporate seafood into food education programmes in schools
12. Ensure access to a post-Brexit workforce



18 STEPS FOR GROWTH – SUPPLY CHAIN

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

1. Sustainable fishing and verification of sustainable fisheries
2. Improve our data on the value chain in Scotland, and use it to unlock growth
3. Map the transport & infrastructure constraints on growth and the options for improvements
4. Maximise the value in waste
5. Capacity within the seafood processing sector (post-Brexit)
6. Beyond Brexit blueprint



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.

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.



QUESTIONS



@SeafoodScotland

#LoveScottishSeafood



THANK YOU

Patrick Hughes
Head of Seafood Scotland
0791 721 3611

patrick.hughes@seafoodscotland.org

Donna Fordyce
Industry Engagement Specialist
0790 081 8003

donna.fordyce@seafoodscotland.org

To get your free online copy of our Action Plan, please visit
www.seafoodscotland.org



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