Strategy for Seafood
Annex: Rationale and Impact

October 2022

Scottish Government
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Annex: Rationale and Impact

The Blue Economy Vision, which we published on 31 March 2022, recognises that Scotland's seas and waters have an integral role to play in contributing to the nation's future prosperity, especially in remote coastal, rural and island communities, and that a healthy marine environment is critical to supporting this ambition.

The seafood industry is a central element of this vision, which sets an ambition for Scotland to be a global leader in providing healthy, high-quality and sustainably produced and harvested seafood for consumption at home and abroad.

Our Strategy for Seafood affirms the importance of the seafood sector and sets out how we are supporting industry to contribute to achieving our blue economy aspirations.

This document outlines the rationale underlying the Strategy for Seafood and the potential impact it could have on parts of Scotland's marine economy.

Rationale

The Blue Economy Vision identified six outcomes across social, environmental and economic dimensions to deliver our aspirations for the sustainable management and shared stewardship of Scotland's seas and coasts to 2045. The seafood sector makes an important contribution right across these outcomes – environmental, social and economic – and one specifically relates to the sustainable production of seafood.

We therefore adapted the Strategy for Seafood vision and outcomes from those in the Blue Economy Vision to highlight and further define this contribution. This also demonstrates how the sector can contribute to the National Outcomes set out in in our National Performance Framework, and the UN Sustainable Development Goals.

> **Strategy for Seafood Vision**
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> Scottish seafood is renowned both at home and internationally for its quality and sustainability and is enabled by an innovative and productive sector
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> **Strategy for Seafood Strategic Outcomes**
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> Scotland is recognised for a seafood sector that is:
>
> 1. entrepreneurial, domestically and internationally competitive, with a secure supply chain.
> 2. providing healthy, quality, sustainably harvested and farmed seafood and ensuring a balanced natural capital asset approach.
> 3. adapting to, and mitigating the impacts of, climate change, lowering greenhouse gas emissions in seafood production and supporting our Net Zero commitments.
> 4. contributing to thriving, resilient and healthy coastal and island communities.

The Strategy for Seafood fulfils our 2021 Programme for Government (PfG) commitment to "…publish a strategy for seafood in 2022 with actions to revitalise the sector consistent with a sustainable and natural capital approach, to ensure remote and rural communities benefit from activity to support growth."

Potential impacts

The strategy sets out how we are supporting industry to contribute to achieving our Blue Economy aspirations by drawing together and bringing cohesion to the wide range of ongoing and planned Scottish Government activities intended to provide support in this area, and for which the relevant impact assessments have been completed as required. The Strategy also makes some high level recommendations that are intended as prompts for future exploration. We cannot therefore determine the impact of any future activities at this stage.

However, our intention is for these recommendations to be reviewed with the sector and any specific options identified for implementation – we will consider fully at that stage the potential impacts on the various groups affected, and prepare any Business Regulatory Impact Assessments that may be required. The groups affected could include the following.

Catching sector

In 2020, there were 2,088 active Scottish-based fishing vessels, primarily consisting of vessels 10 metres and under in length (75% of the total fleet). The 10 metre and under fleet mostly fished using creels (pots); these are commonly used to catch shellfish like crabs, lobsters and *Nephrops* (langoustines). Of those vessels over 10 metres (25% of total fleet), the majority also targeted shellfish, while less than 140 vessels primarily targeted demersal or pelagic species. In total, 4,737 fishers worked on Scottish-based vessels in 2020. Although this accounted for only 0.2% of the total Scottish labour force, it accounted for higher proportions in island communities (e.g. 5% of employment in Shetland). (Scottish Sea Fisheries Statistics 2020)

Aquaculture sector

Scotland's aquaculture sector is highly productive and accounts for the majority of the UK's aquaculture production. It ranks 27th globally, with key species ranking higher still. The majority of production stems from Atlantic salmon, producing just over 200,000 tonnes in 2019 – the third largest production in the world. Scottish farmed salmon is also the UK's top food export. Rainbow trout, brown trout, halibut and cleaner fish are also produced. Shellfish production (e.g. mussels, oysters, scallops) is also key to Scotland's aquaculture, producing just over 7,000 tonnes of shellfish in 2019. Scottish sea mussel production, for example, ranked third globally. (Marine Scotland analysis of Global Seafood Production Data 2019, FAO; Scottish Sea Fisheries Statistics 2019; Scottish Fish Farm Production Survey 2019; Scottish Shellfish Farm Production Survey 2019; HMRC UK trade data)

Seafood processors

In 2021, there were an estimated 128 seafood processing sites located in Scotland (37% of all processing sites in the UK). These sites process both wild-capture fish as well as farmed fish. Many processing sites in Scotland also engage in trading or wholesaling (82%), exporting (51%), importing (22%), and/or retail (41%). The businesses operating these may be impacted by elements of this strategy as well as the 7,785 people employed by this sector in 2021. (Data derived from the Seafish Processing Enquiry Tool)

Coastal communities

The catching, aquaculture, and processing sectors directly affect the wider coastal and rural economies in which they play a key role, and by extension the local communities that support and benefit from the economic activity and jobs created and supported.

Wider marine economy

The seafood industry is only one user of the marine space, as such any impacts on this industry may in turn impact other sectors in the wider marine economy, in particular sectors such as marine renewables and marine tourism. For context, all Scottish marine sectors combined (excluding offshore wind) employed 75,490 people in 2019, contributing 2.8% of the total Scottish employment (Scotland's Marine Economic Statistics 2019).

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