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Strategy for Seafood

Domestic and international trade
and the supply chain

October 2022

marinescotland

Strategy for Seafood

Domestic and international trade and the supply chain

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Page 22 : Mackerel pate with oatcakes and radish garnish

Page 28 : Fish processing

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Ministerial foreword



Our [Blue Economy Vision](#), which we published on 31 March 2022, recognises that Scotland's seas and waters have a key 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 essential to supporting this ambition.

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

I am pleased to present our Strategy for Seafood, which affirms the importance of the seafood sector and sets out how we are supporting industry to contribute to achieving our blue economy aspirations.

The seafood sector provides employment, is an integral part of the way of life in many coastal towns and villages and will be an essential part of our green recovery as we move towards our vision of a wellbeing economy as laid out in our [National Strategy for Economic Transformation](#).

We have a vision for Scotland as a world class fishing nation, delivering responsible and sustainable sea fisheries management, as outlined in our [Future Fisheries Management Strategy](#). We will also deliver a vision for an economically, socially and environmentally sustainable future for the aquaculture sector later this year, supporting the continued success of the UK's number one food export – farmed salmon – whilst making progress to increase production of shellfish and seaweed.

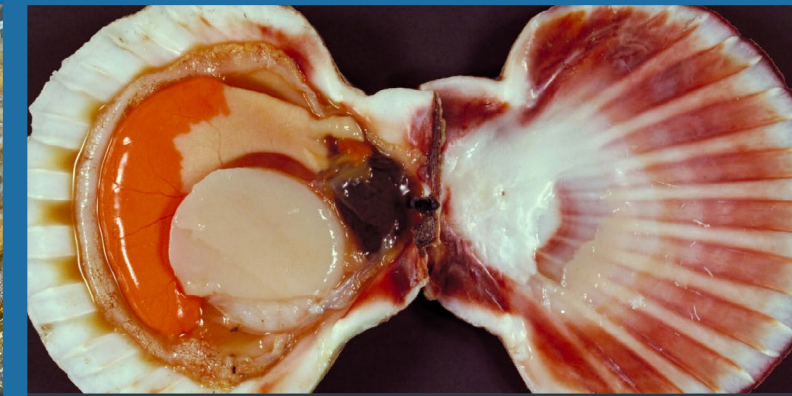
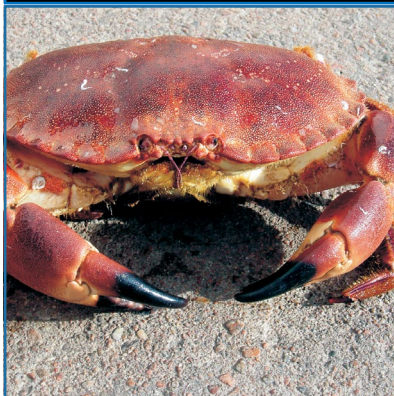
Our marine environment can contribute significantly to our commitment to being a [Good Food Nation](#), with seafood from Scotland renowned globally for its quality, and it can play a role in increasing our food security. As we operate against the backdrop of the twin crises of biodiversity loss and global warming, it is important we consider the role our fishing, aquaculture and processing communities can play in helping us achieve Scotland's net zero targets, while the [Bute House Agreement](#) laid out a range of measures to improve existing ecosystems, encourage sustainability and protect our natural capital.

The last few years have been exceptionally challenging for the seafood sector, with Brexit, the coronavirus pandemic (COVID-19) and more recently the impact of the illegal Russian invasion of Ukraine. The sector has shown incredible resilience. Now, in the new post-Brexit era, we have to accelerate this recovery and the development of a sustainable seafood economy.

I look forward to working with the sector towards a sustainable future for seafood in Scotland.

Mairi Gougeon
Cabinet Secretary for Rural Affairs and Islands

Vision



Economic

Environmental

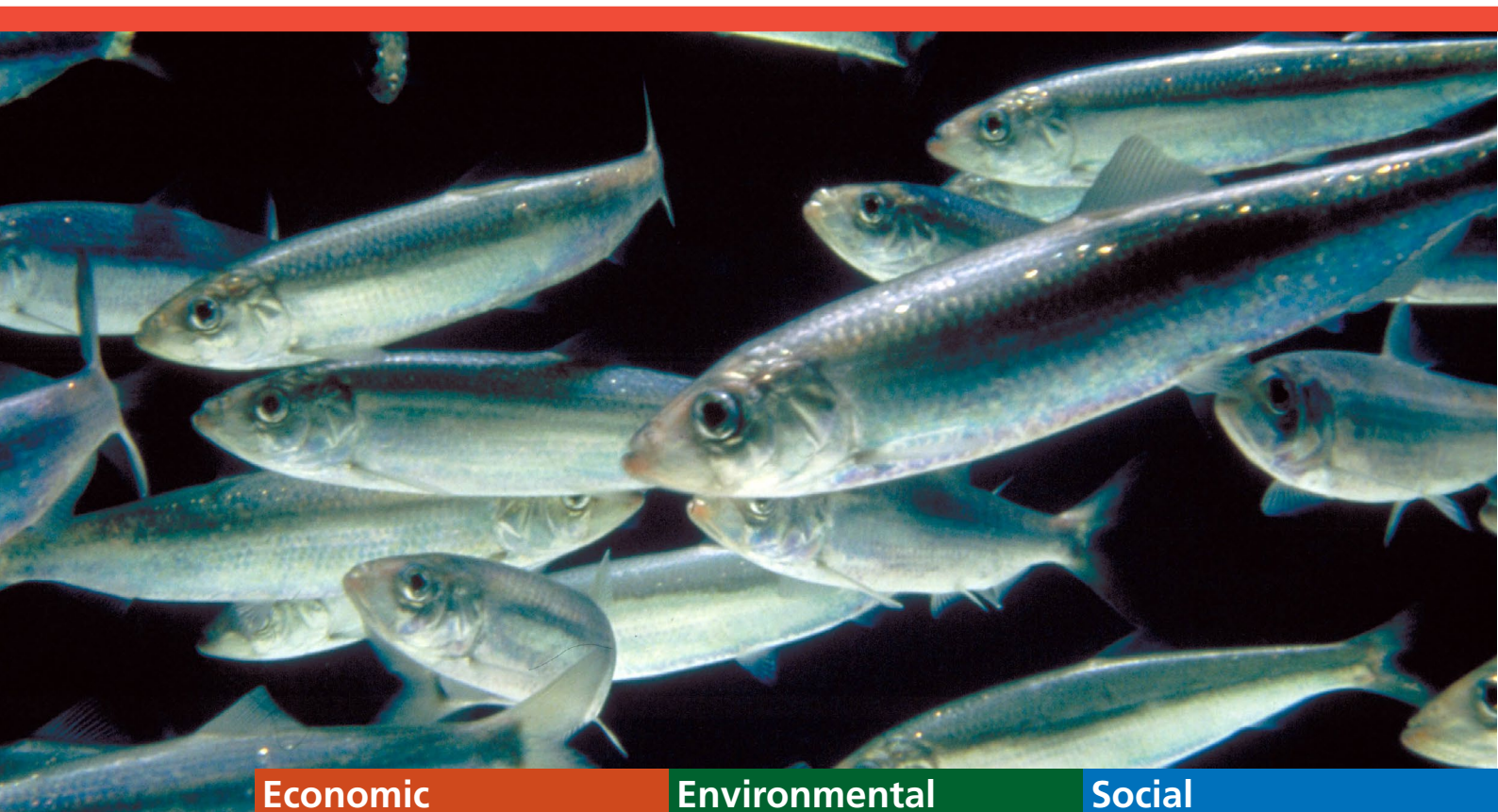
Social

1. Vision

The [Blue Economy Vision](#) set out the Scottish Government's ambition for the marine environment. It 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 Blue Economy Vision recognises economic prosperity and wellbeing are embedded within nature and, in order to harness marine product opportunities, we must transform our economy and society to thrive within sustainable limits.

Scotland's world-renowned seafood sector, from catching and production to consumption, is an important pillar of our blue economy – indeed, one of the Blue Economy outcomes relates specifically to the sustainable production of seafood. In addition, the seafood sector makes an important contribution right across the outcomes – environmental, social and economic.

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



1.1 Strategy for Seafood Vision:

Scottish seafood is renowned both at home and internationally for its quality and sustainability and is enabled by an innovative and productive sector

1.2 Strategy for Seafood Strategic Outcomes:

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.

This strategy collates and brings cohesion to the wide range of current Scottish Government policy and strategy initiatives that support the achievement of each of these outcomes and highlights some of the inputs industry are delivering to action these. Within each section, it lays out broad recommendations for potential areas of work in the future, and further work will be needed to explore how best to take these forward.



Economic

Environmental

Social

Strategy for Seafood Vision

Scottish seafood is renowned both at home and internationally for its quality and sustainability and is enabled by an innovative and productive sector.

**One Ocean, One Earth, One Home,
One Shared Future**

| Blue Economy themes | Strategy for Seafood Strategic Outcomes | National Performance Outcomes | UN Sustainable Development Goals |
|----------------------|---|-------------------------------|----------------------------------|
| Economic | A seafood sector that is entrepreneurial, domestically and internationally competitive, with a secure supply chain | | |
| Environmental | <p>A seafood sector that is providing healthy, quality, sustainably harvested and farmed seafood and ensuring a balanced natural capital asset approach</p> <p>A seafood sector that is adapting to, and mitigating the impacts of, climate change, lowering greenhouse gas emissions in seafood production and supporting our net zero commitments</p> | | |
| Social | A seafood sector that is contributing to thriving, resilient and healthy coastal and island communities | | |

Figure 1: Strategy for Seafood vision and outcomes

Key

National Performance Outcomes:



We grow up loved, safe and respected so that we realise our full potential



We live in communities that are inclusive, empowered, resilient and safe



We are creative and our vibrant and diverse cultures are expressed and enjoyed widely



We have a globally competitive, entrepreneurial, inclusive and sustainable economy



We are well educated, skilled and able to contribute to society



We value, enjoy, protect and enhance our environment



We have thriving and innovative businesses, with quality jobs and fair work for everyone



We are healthy and active



We respect, protect and fulfil human rights and live free from discrimination



We are open, connected and make a positive contribution internationally



We tackle poverty by sharing opportunities, wealth and power more equally

UN Sustainable Development Goals:



Background

A large flock of seagulls is shown in flight over a body of water. The birds are densely packed, filling most of the frame. In the foreground, a green fishing net is visible, partially submerged in the water. The water is dark and choppy. The overall scene suggests a busy fishing operation or a large gathering of birds near a coastal area.

Economic

Environmental

Social

2. Background

In 2019 (the most recent figures available), there were an estimated 14,092 people directly employed in the seafood sector, many in remote coastal and island communities. 95% of commercial fishing jobs are located in areas of Scotland that together are home to less than a third of the total population – including, for example, Aberdeenshire, Highland, Shetland, Na h-Eileanan Siar, and Orkney ([Scotland's Marine Economic Statistics, 2019](#) and [National Records of Scotland 2019 mid-year population estimates](#)). Rural communities can suffer from infrastructure constraints, such as availability of housing, transport services and access to chilled storage, which are needed to successfully deliver local and regional food supply and in turn support economic output from seafood for these areas.

Fish and seafood is Scotland's primary food export. In 2021, Scottish exports of fish and seafood were valued at £1.0 billion (204 thousand tonnes) and accounted for 60% of total Scottish food exports (£1.7bn), and 63% of total UK fish and seafood exports (£1.6bn) ([HMRC Regional Trade Statistics](#)). UK exports of Atlantic salmon farmed in Scotland were worth £614 million in 2021 and made up 38% of total UK fish and seafood exports.

Seafood can have an important role in domestic food security and also economic security in terms of export value. The short-life Food Security and Supply Taskforce was established on 17 March 2022 to, "monitor, identify and respond to any potential disruption to food security and supply resulting from the impact of the ongoing conflict in Ukraine". This taskforce co-chaired with Scotland Food and Drink published its [report](#) on 23 June, and included a set of short, medium and longer-term recommendations that cover three key themes:

- ▶ business and supply chain support
- ▶ future national food security structures
- ▶ reserved issues to be raised with the UK Government

We are looking at the delivery of those recommendations and updated information will become available as that process moves forward. The taskforce is intending to meet again twice more this year in a monitoring capacity. This will be to test in more detail – as necessary – issues that arise and also to monitor the delivery of the agreed recommendations.

It can be challenging to source accurate figures on the domestic consumption of landed, farmed or processed seafood, including the origin of this seafood, and this is why one of the recommendations for future work falling from this strategy is around exploring additional sources of data. Despite the lack of data in this area, we know that Scottish consumers (like UK consumers) consume too little fish. This is particularly true for oily fish, the intake of which is monitored by Food Standards Scotland as part of monitoring progress towards the [Scottish Dietary Goals](#). We also know that Scottish consumption of seafood accounts for only a small fraction of the fish landed and farmed in Scotland, with most exported to the rest of the UK or overseas.

We reap a range of social and economic benefits in harvesting and processing seafood and must ensure that in doing so we are managing production in a way that is cognisant of the threat of marine biodiversity loss, and which allows us to meet our climate change responsibilities. We must consider marine spatial demands from sources such as offshore wind energy, the development of fisheries management measures required for the current Marine Protected Areas (MPA) network and the introduction of new Highly Protected Marine Areas (HPMAs). As we refine and adjust our management approach for the future, we must ensure the shift to a method where we value and track our natural resources, and ensure that data which informs legislation and policy incorporates a [natural capital accounting model](#).

Our economies, livelihoods and well-being all depend on our most precious asset: “Nature”, where nature provides a flow of benefits to people and the economy, called **natural capital**. It helps demonstrate the interconnections between economic, societal and environmental challenges in a more holistic way.

Our **Blue Economy Vision** reinforced the message that it is Scotland’s natural capital assets that will underpin the success of our economy and this is especially true for the seafood sector. The vision states that by 2045 Scotland’s shared stewardship of our marine environment supports ecosystem health, improved livelihoods, economic prosperity, social inclusion and wellbeing. This is in line with the [UK Marine Policy statement](#) that a clean, healthy, safe, productive and diverse marine environment meeting the long term needs of people and nature in coastal and island communities will support a successful and sustainable seafood sector.

We will also start the process of developing a **new National Marine Plan**, to address the global climate and nature crises by carefully managing increasing competition for space and resources in the marine environment.

Outcomes



Economic

Environmental

Social

Outcome 1

... a seafood sector that is entrepreneurial, domestically and internationally competitive with a secure supply chain

Our ambition is for the Scottish seafood sector to be invested in inclusive and sustainable economic development, underpinned by a secure skills base, and supported by a skilled, inclusive and diverse workforce and employers who implement Fair Work policies as a basis for employment.

To do this requires action across a range of areas, from improving infrastructure, addressing labour shortages and increasing value and efficiency, to developing markets and increasing the vertical and horizontal integration of the sector where it will add value. We want to ensure added value processing and highly valued seafood products continue to add to the socio-economic benefits to the community.



Economic

Environmental

Social

What we're doing already

Primary production

As set out in our ten-year [Fisheries Management Strategy](#), to help boost the link between the harvesting of raw seafood materials and onshore processing and production, we will increase the benefit from fishing to Scotland through our policies around allocation of additional quota, ensuring quota is in the hands of active fishers, and increasing the volume of fish landed into Scotland including through the introduction of a Scottish economic link licence condition in 2023 following on from previous [consultation](#). This should help to maximise the growth of onshore processing potential.

Another vital source of seafood is the aquaculture sector and, this year, the Scottish Government will publish its **Vision for Sustainable Aquaculture**, setting out our vision for the future of the finfish, shellfish and seaweed sectors with a renewed emphasis on sustainable development, environmental protection and community benefits.

This year saw the opening of Scotland's [Seaweed Academy](#). There is a long history of harvesting wild seaweed in Scotland and although the existing Scottish seaweed industry is small, there is a growing interest in further developing the commercial seaweed-based industry through creating new high value products from wild seaweed and through cultivating seaweed to supply various existing and emerging markets.

International trade growth

We and our enterprise agencies are working with seafood exporters as they continue to recover and rebuild their exports in Europe and other key markets such as Asia and USA. We have already worked with the key trade bodies across the food and drink sector to develop a COVID-19 [Recovery Plan](#), which was announced in November 2020, and have committed to support the plan with £15 million through to 2023. The plan contains 50 actions to support all sectors of Scotland's food and drink industry to recover from COVID and Brexit with particular focus on two overarching aims: stimulating more demand in key markets; and supporting businesses to capitalise on this demand.

We are also supporting the seafood industry through delivery of the second phase of the **Scotland Food and Drink Export Plan**. This is underpinned by £4.5 million of joint funding from the Scottish Government, industry and Scottish Development International and is helping Scottish companies take their products into new and existing markets, exploiting the most significant export opportunities for Scotland.

We will continue to push the UK Government to negotiate new trade deals that will safeguard our devolved Fisheries Management and promote the interests of the Scottish seafood industry in line with our [Vision for Trade](#). We will also continue to press the UK Government to outline a target operating model for exports that is acceptable to all administrations and reduces biosecurity risk. We remain committed to ensuring that Scottish Government officials are closely engaged with UK Government on any impact to our processing or catching sector.

Given that fishing opportunities are established on an annual basis in accordance with independent, internationally agreed stock advice, it is important that our approach to any trade agreement reached is consistent with our negotiating principles for annual negotiations. The Scottish Government's approach to annual negotiations has consistently been to seek the best outcome for Scottish fishing interests and our coastal communities through securing sustainable catching opportunities.

Labour and skills

Despite repeated warnings about the damage they would inflict on Scotland, the UK Government ignored the evidence from business and experts, and pushed ahead with their immigration plans including the ending of free movement. Labour shortages are an acute problem in the seafood sector, particularly within seafood processing. We will continue to engage with UK Government to resolve the problems it has created and to support the sector to deal with these.

We are also working with a range of sectors to support future workforce planning. We have committed to developing a talent attraction programme and migration service to attract workers with the skills that Scotland needs. This will improve Scotland's ability to attract and recruit workers from outside of Scotland with the skills that our economy will need in the future, and support international workers in the migration and relocation process. We continue to support the Skills Recognition Scotland project, supporting workers with qualifications gained outside the UK to overcome unemployment and underemployment and support employers to recruit talent and help address skills shortages.

We continue to work with business organisations and industry representatives to better understand the challenges we face and to develop suitable mitigating activity, with a focus on employability, skills and fair work actions. In partnership, we have supported a range of initiatives specific to the seafood sector including through the Scottish Seafood Training Network, the Seafood Business Improvement Programme and the "Sea a Bright Future" careers campaign.

Innovation and funding

Through the European Maritime and Fisheries Fund (that has delivered some £120 million in grant funding assistance to Scotland's marine sectors) and its replacement the [Marine Fund Scotland \(MFS\)](#), the Scottish Government has been providing vital grant funding assistance to the seafood sector. This has helped to support local supply chains, protect jobs in fragile coastal communities, and support the industry to adapt and invest. The MFS will continue to support the sustainable development of Scotland's blue economy, seeking to deliver economic and societal outcomes through green growth.

We recognise the public funding support and wider delivery landscape can be confusing for seafood businesses – with multiple sources of funding and various UK, Scottish and regional organisations. The Scottish Government is a member of the Business Support Partnership, which runs the [Find Business Support webpage](#) - this provides an overview of funding and services for businesses offered by public sector organisations across Scotland.

We are currently reviewing the wider delivery landscape for support for businesses across all food and drink sectors, identifying opportunities to align our ambitions for growth with the wider policy environment and to offer businesses access to a simple and effective support landscape that maximises the positive impact of public funding.

The UK Government's cross-UK £100 million UK Seafood Fund is a particular source of confusion. Fisheries funding is devolved and it should be for Scottish Ministers alone, answerable to the Scottish Parliament, to make the appropriate spending decisions in this area in Scotland – not the UK Government. We will continue to use the funding we do have to deliver maximum effect through the MFS, but we will also continue to press the UK Government to respect devolution of marine funding and to recognise the size and importance of Scotland's marine sectors.

We are committed to ensuring the outcome of the Seafish review is beneficial for the Scottish sector ([Seafish](#) is a non-departmental public body that works across the UK). We formally responded to the recommendations highlighting the need for Seafish to better represent and add value for Scottish industry, taking account of regional and sectoral variations and avoiding duplicating the efforts of other organisations.

The MFS for 2022-23 has been updated to align to the Blue Economy Vision and will continue to enable projects aimed at delivering benefits and supporting innovation for the seafood and wider marine sectors. We provided funding towards the [Opportunity North East \(ONE\) Seafood Transformation Project](#) and are working closely with ONE

as part of the steering and working groups. Successful implementation of the project will encourage diversification, add value and increase demand in international and domestic markets, with a specific focus on the North East seafood sector.

We have also funded the Seafood Scotland led **Nephrops Programme Board** to the tune of £1 million to date, with further funding planned, which is addressing the specific challenges faced in the langoustine sector. The group is drawn from businesses throughout the sector, which is enabling collaboration and development of innovative actions right across the supply chain. Scottish Government sits on the steering group for the project, with the seven workstreams being: recovering markets, developing new markets, improving efficiency, improving product quality, investment and innovation programme, demonstrating environmental sustainability and improving data management. There are lessons to learn from this integrated approach, which could lend itself to other parts of the seafood sector.

We also support and fund the development of automation where it can boost productivity and support more efficient operations to ensure the long term stability and economic output of businesses.

The ongoing disruption to the seafood sector since January 2021 is clear evidence of the additional costs and losses associated with becoming an EU third country, and the trade frictions that introduces. Partnership working has delivered additional support to exporters, through the development of centralised hubs for export, staffed by Food Standards Scotland certifying officers, working with private enterprise to deliver an innovative solution to streamline the complex export processes. We continue to work with the sector to deal with technical challenges like these arising from EU Exit, including through the work of the **Scottish Seafood Industry Action Group**. We will continue to engage with the UK Government on the delivery of a Single Trade Window, and support local initiatives to deliver digitisation of processes to support the move to an electronic trade system.

We continue to align with the strategic outcomes of EU legislation, regulation and policies where it is both possible and in Scotland's interest to do so; an approach which will support us in seeking to join the EU as an independent member state at the earliest opportunity.

What next

The seafood sector has faced unprecedented challenges over the last few years and has had to constantly adapt. There are lessons to be learned from this, and the effectiveness of interventions to support it, particularly in the face of continuing political and global uncertainty. It is clear there are challenges in how organisations collect and analyse and use data effectively, including difficulties in extrapolating Scottish specific data from UK wide figures. **We will explore how the Scottish Government, industry and other organisations can work together to better understand regional trade flows, the domestic consumption of seafood and environmental impact in order to inform future interventions.**



Economic

Environmental

Social

Outcome 2

... a seafood sector that is providing healthy, quality, sustainably harvested and farmed seafood and ensuring a balanced natural capital asset approach

Our ambition is for Scotland's global reputation for its seafood as nutritious, sustainable products to be enhanced with investment in ports, harbours and trade routes, and for the economic and social benefit from these natural assets to be shared through a supported, prosperous, decarbonised supply chain. As a [Good Food Nation](#), we want more people in Scotland to enjoy the dietary benefits of seafood as a low-carbon accessible protein source, contributing to lower food miles.

To do this will involve raising awareness of Scottish seafood through domestic marketing, exploring how to make Scottish seafood more competitive and attractive to UK consumers and exploring how accreditation, and investment to support this, can work more effectively for industry and consumer. It will also mean considering the role of seafood within the wider competition for marine space and how best to manage the impact on habitats, using an ecosystem-based approach to minimise and, where possible, reverse negative impacts. This approach is a strategy for the integrated management of land, water and living resources that promotes conservation and sustainable use in an equitable way. Application of the ecosystem approach will help to reach a balance of the three objectives of the [United Nations Convention on Biological Diversity](#).



What we're doing already

Seafood promotion

The Scottish Government funds [Seafood Scotland](#), the national trade and marketing body for the Scottish seafood industry which is a central point for industry information, stakeholder guidance and bespoke industry research.

Scotland is home to some of the finest seafood globally. There is increased interest from consumers in understanding the sustainability and provenance of the food they eat, and a related benefit in being able to demonstrate where Scottish food and drink products are produced in an environmentally responsible way and the steps many Scottish businesses are taking towards net zero goals. It is important that the seafood sector is at the forefront of sustainable fishing and aquaculture practices and that this can be easily recognised by those buying Scottish products.

In order to highlight this, we are undertaking exploratory work into marketing branding for Scottish food and drink produce which, alongside our [local food strategy consultation analysis](#), will help support and grow Scottish seafood as a sustainable, healthy food both at home and abroad.

Through the [Scottish Nephrops Programme Board](#) we are supporting industry to explore the accreditation of Scottish langoustine as a premium quality product and potentially acting as a reference point for other species.

Building on the food and drink recovery plan, the Scottish Government partnership group Scotland Food and Drink are working to refresh [Ambition 2030](#), a longer term strategy to grow Scotland's food and drink sector. This will take a whole supply chain approach across the sectors, including fishing and aquaculture.

The [Good Food Nation Bill](#) was passed by the Scottish Parliament on 15 June and our world-leading approach will create links between policies at the national and local levels, with Government, local authorities and health boards all creating good food nation plans. Those plans will set out clear outcomes, indicators and policy across a range of areas relating to food including the environment, health and education.

Marine management

Through **Scotland's Fisheries Management Strategy** we have a range of actions in place to support sustainable and responsible management of sea fishing. We have set a course to deliver our vision for Scotland to be a world class fishing nation delivering responsible and sustainable fisheries management. This includes exploring the introduction of a new catching policy, which will deliver improvements in how we fish, so that waste is reduced and the impact of fishing on wider marine ecosystems is managed appropriately. We are committed to the use of technology to improve management, enrich the scientific evidence base with which we make decisions and enable our fishers to demonstrate responsible fishing practices.

We are continuing to progress our 2019 Programme for Government commitment to modernise the inshore fleet, and are installing Remote Electronic Monitoring (REM) systems to the Scottish scallop dredge sector. We have also committed to the mandatory introduction of REM technology to the scallop dredge and large pelagic fleet fishing in Scottish waters, along with rollout to other parts of the fishing fleet as appropriate and subject to consultation.

We have now published a detailed delivery plan which supports Scotland's Fisheries Management Strategy and is intended to help stakeholders understand the progress that has been made in delivering key aspects of the strategy so far. It should also help stakeholders to forward plan by indicating when work to deliver the various actions within the strategy is intended to be carried out.

We have a pilot project in the Outer Hebrides trialling a low cost monitoring solution for the inshore static gear fleet. Further trials will also be undertaken this year on different systems to help inform national roll-out of tracking and monitoring technology on the inshore fleet.

Supported by £5 million jointly from Scottish and UK Governments, the [Borderlands Growth Deal](#) Natural Capital programme consists of a series of pilot projects which aim to improve the region's economic resilience through testing transformative working practices. The Marine and Coastal pilot, led by Dumfries and Galloway Council, is a cross border project, which will work across both shores of the Solway. Aiming to support the commercial shellfish and fishing sectors by improving the natural habitat and developing practical techniques for habitat and species regeneration, its objective is to improve the health of commercial fish stocks focussing on the shellfish and fishing sector and salt bed livestock products.

To complement the marine environmental measures in the [Bute House Agreement](#), and protect the inshore seabed, we are undertaking extensive consultation on commercial fishing-related inshore fisheries proposals to:

- ▶ introduce a cap (based on current levels) on fishing activity in inshore waters (up to three nautical miles)
- ▶ review the status of latent scallop entitlements
- ▶ extend tracking and monitoring solutions for all inshore commercial vessels.

The agreement also includes a commitment to designating at least 10% of Scotland's seas as Highly Protected Marine Areas (HPMAs) by 2026, across both inshore and offshore waters.

HPMAs will greatly enhance the existing network of Marine Protected Areas in Scotland, providing an additional level of marine protection by excluding all extractive, destructive or depositional activities while only allowing other activities at non-damaging levels.

Marine Scotland Science aims to continue the development of Scotland's significant investment in the collection of data and information to continually develop the robust evidence base for the management of sustainable fishing and aquaculture sectors.

Our aspiration is to develop the circular economy through the funding of initiatives by Marine Fund Scotland.



Economic

Environmental

Social

Aquaculture management

We are also continually working to improve the policy and regulatory framework of the aquaculture sector to support its sustainable growth.

As the first phase of an [aquaculture review](#), Professor Griggs submitted an independent report in February 2022 on the aquaculture consenting process. We accepted the recommendations in principle and welcomed the challenge of momentum created in the report. In response the Scottish Aquaculture Council was established, chaired by the Cabinet Secretary for Rural Affairs and Islands and attended by the Minister for Environment and Land Reform, to provide advice to Scottish Ministers and ensure we make equal progress on our aquaculture environment, strategy and regulatory review commitments.

To make immediate progress on improvements to the consenting framework, we asked the Scottish Scientific Advisory Council (SSAC) to explore the use of science in aquaculture consenting in response to issues raised in Professor Griggs' report. A consenting task group will be established to look at efficiency, effectiveness and transparency of the system, following an immediate change to the marine licence renewal period for finfish and shellfish farms from 6 to 25 years, bringing it in line with the Crown Estate Scotland Lease cycle.

In addition, our **Vision for Sustainable Aquaculture** will set out how the Scottish Government anticipates the aquaculture sector growing and providing more sustainably produced food. The vision will place an enhanced emphasis on environmental protection and will identify opportunities for increasing the impact of resources committed to community benefit and will support efforts to deliver real transformation for host communities. The vision will set out how we intend to support an aquaculture industry which is sustainable, diverse, competitive and economically viable and ensure there is a thriving marine ecosystem for future generations.

We will continue to progress the actions outlined in [our response to the Salmon Interactions Working Group report](#) which sets out recommendations to address the interactions between wild and farmed salmon in Scotland, including progress towards the implementation of a new risk-based framework for managing the interactions between sea lice and farmed and wild fish by the Scottish Environment Protection Agency.

What next

We would like to see more innovation through projects similar to ONE's Seafood Transformation Project, which can support diversification and vertical integration. There are also opportunities presented by digitalisation in the supply chain, especially around traceability. While much of this is for industry to take forward, **the Scottish Government will consider how best to support industry to develop innovative approaches, a move to a more circular economy and embrace digitalisation.**

We recognise the benefits of partnership working within and across sectors along with the challenges this entails. Vertical integration can make a difference in some cases throughout the supply chain, while there is also scope for greater localised and regionalised collaboration across other areas, for example, by developing local business clusters. In addition, innovation and development can be supported by links between academic institutions and entrepreneurial activity. Therefore, **we will explore how to encourage collaborative approaches, including local cluster options, vertical integration and cooperation from producers to processors and links to centres of excellence and research and innovation.**



Economic

Environmental

Social

Outcome 3

...a seafood sector that is adapting to, and mitigating the impacts of, climate change, lowering greenhouse gas emissions in seafood production and supporting our net zero commitments

Our ambition is for a marine environment that is clean, healthy, productive, resilient to climate change, and safeguarded for present and future generations, maximising the resources and services nature can provide.

The seafood sector has a key role to play in achieving our net zero commitments, by decarbonising throughout its supply chains from catching and processing to logistics, using energy efficient fuels and processes, and applying circular economy principles to minimise waste. In doing so we must ensure supporting net zero in Scotland isn't simply increasing emissions in other countries through increased imports.

To do this will involve increasing collaboration across science, non-governmental organisations (NGOs), industry and the public sectors – using data on emissions and natural capital accounting in future to inform our decision making – and developing the public's understanding of seafood as a relatively low-carbon protein food source.



Economic

Environmental

Social

What we're doing already

Science and data

We have been working collaboratively to identify key evidence gaps in our understanding of greenhouse gas emissions throughout the seafood supply chain and how to mitigate these.

For example, research commissioned by Scottish Government through Scotland's climate centre of expertise the ClimateXChange [assessed the greenhouse gas emissions from Scotland's fishing fleet](#) and ongoing research by the Scottish Blue Carbon Forum is helping to understand the interaction between fishing and blue carbon.

This research continues to build a clearer picture of how fishing is contributing to climate change and we will work with stakeholders to develop actions to support the sector to transition to net zero.

We will also take forward recommendations from the Third Climate Change Risk Assessment to ensure the seafood sector is resilient and adaptable to the impacts of climate change.

Emission reduction

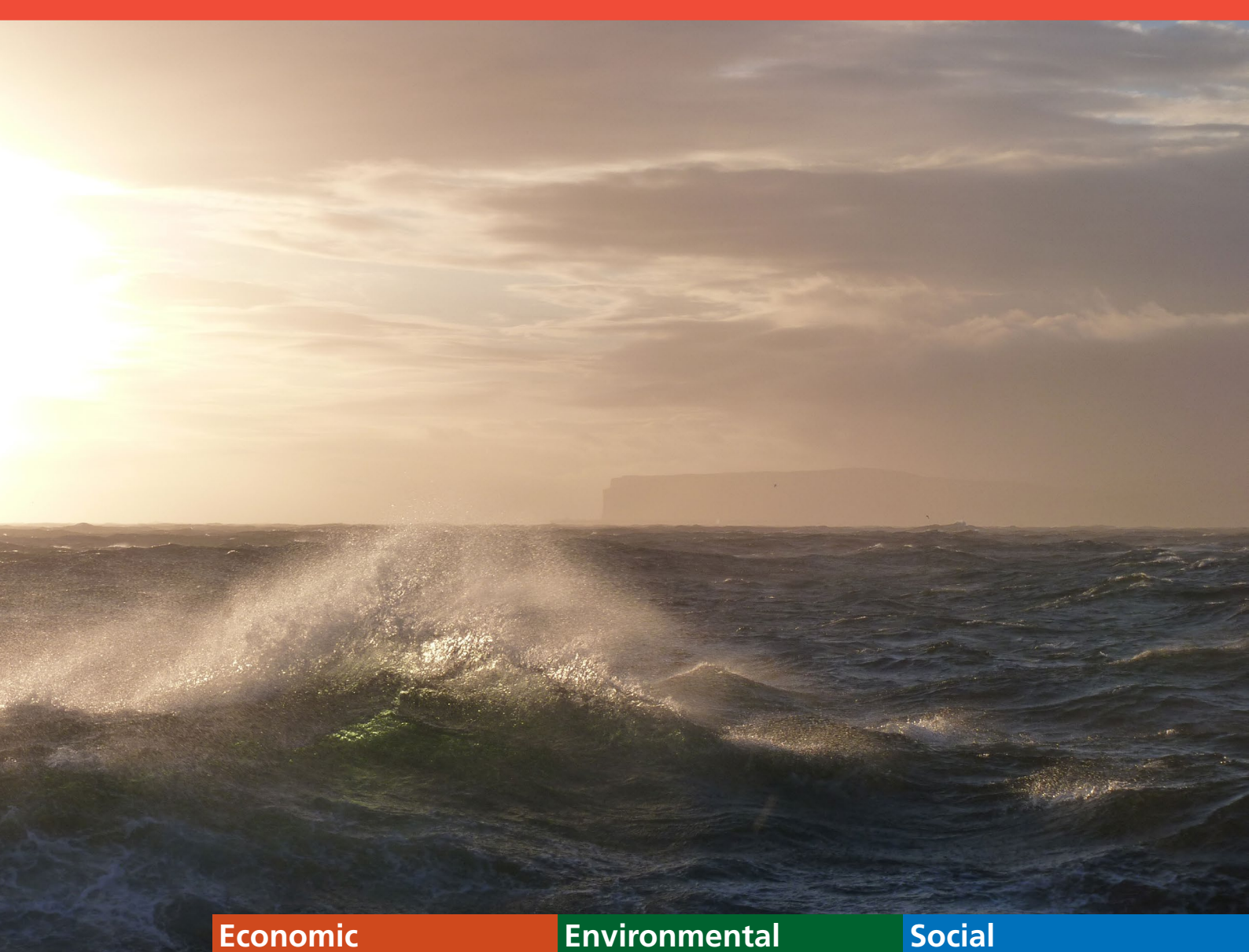
The **Scottish Nephrops Programme Board** is exploring opportunities to move toward net zero and build greater resilience in the nephrops industry throughout the whole supply chain, from the engine efficiency of vessels to waste in the processing sector.

Our **Fisheries Management Strategy** affirms our commitment to working in partnership with our stakeholders to support the fishing sector to transition to net zero, to adapt to the climate change impacts that are already locked in and to understand and limit the impact of fishing on the marine environment.

The Scottish salmon farming sector has set a target of achieving net zero emissions by 2045. The Vision for Sustainable Aquaculture will set out how the aquaculture sector as a whole can work towards net zero emissions through further innovation and circular economy opportunities.

What next

It is imperative we support the seafood sector to transition to net zero and adapt to the climate change impacts that are already locked in. While there are ongoing pieces of work to do this within specific sectors – such as the fishing fleet – we recognise the importance of addressing this throughout the seafood supply chain. Therefore, **we will explore how to support the sector to understand greenhouse gas emissions throughout the seafood supply chain and how best to mitigate these, supporting our net zero commitments.**



Economic

Environmental

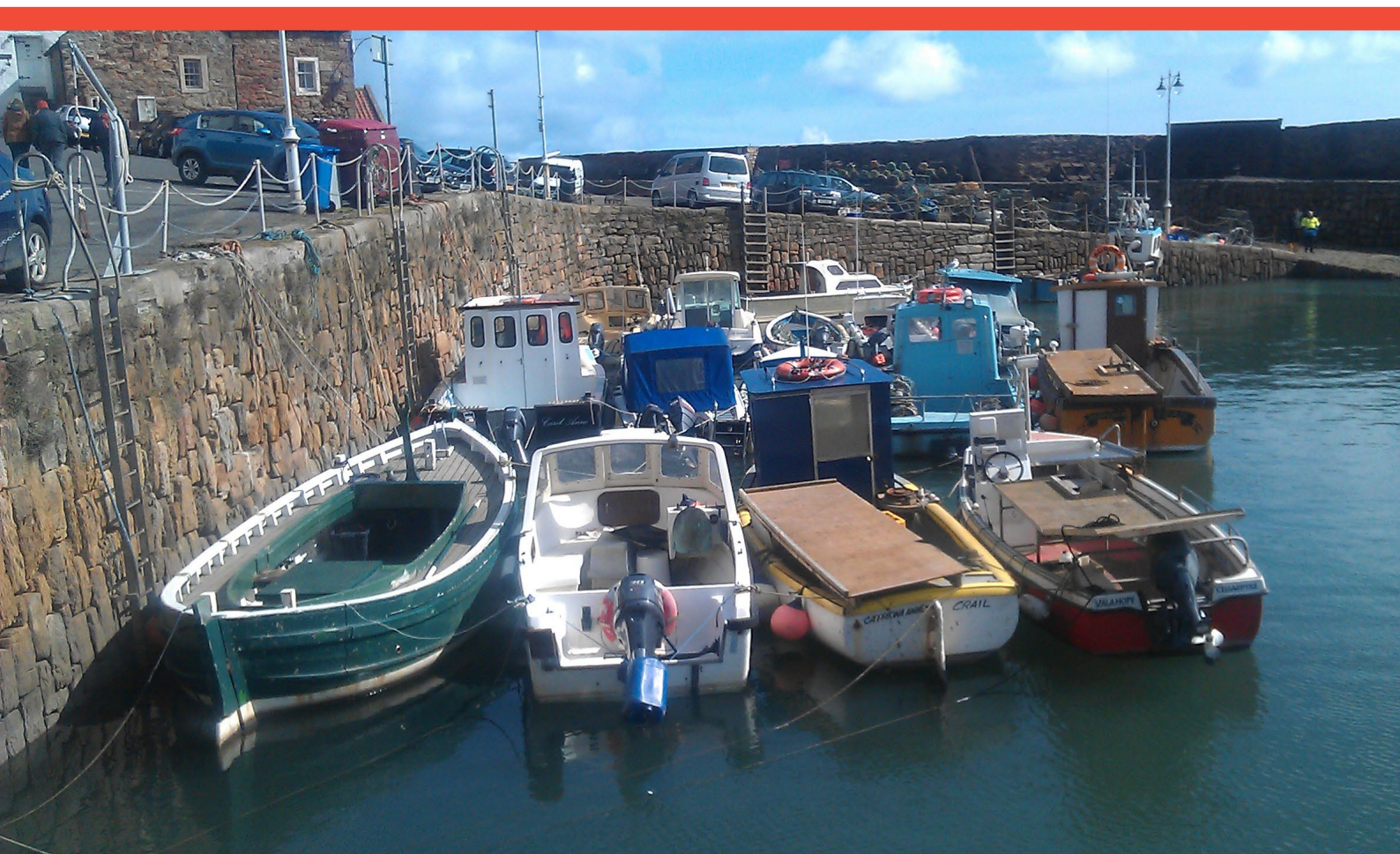
Social

Outcome 4

...a seafood sector that is contributing to thriving, resilient and healthy coastal and island communities

Our ambition is that our coastal and island communities benefit from inclusive, fair, high-quality, skilled jobs in the seafood sector, to access and enjoy the wider benefits that arise. Seafood has a role to play in people valuing and respecting Scotland's sea so they feel part of a coastal nation, with a proud heritage and culture and a vibrant future.

To do this will involve improving the development of the seafood industry in coastal and island communities, increasing the attractiveness and accessibility of jobs in the seafood industry, including professional pathways, and improving infrastructure in coastal and island communities.



Economic

Environmental

Social

Population and infrastructure

This aligns with our continued work with the [Convention of the Highlands and Islands](#) (CoHI) Working Group on Population. The CoHI Working Group identified five key thematic areas of the population challenge facing our rural and island communities: Housing; Jobs; Critical Infrastructure – Transport and Digital; Access to public services; and Talent Attraction, Retention and Return.

At the most recent CoHI in March 2022, it was announced that the Scottish Government would be progressing with our commitment to developing an action plan to address the challenge of depopulation, with a view to a draft publication in 2023. Developing approaches to ensuring that employment and skills opportunities align with local industry, such as the seafood industry, will be a key consideration as this plan is developed.

We recognise the particular challenges for coastal, rural and island communities and through delivery of the City Region and Regional Growth Deals we are helping to address these challenges. For example, the Island Growth Deal secures investment of up to £50 million each from the Scottish and UK Governments over 10 years to drive sustainable and inclusive economic growth across Orkney, Shetland and the Outer Hebrides. This deal is about investing in local people, projects and priorities in partnership with the island authorities and UK Government to spread the benefits of inclusive economic growth across the three island groups, increasing opportunities for all.

As part of the [Islands Growth Deal](#), the Outer Hebrides Food and Drink Programme is being developed under the theme of Supporting Growth and Future Industries and aims to support specific capital investments agreed as priorities with community landowners, aquaculture and fishing industry representatives. Also under that Growth Deal strand, the [Shell-Volution](#) project aims to transform shellfish aquaculture by delivering sustainable growth and quality jobs in an environmentally sensitive, low carbon manner through collaborative research and innovation.

The Scottish and UK Governments have each committed to investing up to £25 million in the Argyll and Bute Growth Deal over 10 years. A key part of the Deal is the Marine Aquaculture Programme which includes the [Scottish Association for Marine Science](#) (SAMS) International Seaweed and Shellfish Industry R&D Centre project. This will create a platform for industrial innovation that will allow a direct commercialisation of the world leading research expertise at SAMS and catalyse growth in the region's high value seaweed and shellfish industries.

The Marine Aquaculture Programme includes the Machrihanish Innovation Campus project, which will provide large scale marine finfish and multi-trophic research and development capability as well as dedicated business incubation and scaled up premises and facilities.

The Scottish Government is working closely with partners towards a Full Deal for both the Islands Growth Deal and the Argyll and Bute Growth Deal to the benefit of communities across those areas.

Our investment in the partnership project to create a deep water terminal at Stornoway is another example of how we are supporting our island communities – it will provide infrastructure to support a diverse range of industries and economic activities.

People and skills

As outlined under Outcome 1, we have a range of measures to attract and develop a skilled workforce for the seafood industry. We are supporting initiatives to attract people into aquaculture including through our support to the [Women in Scottish Aquaculture](#) network and the Lantra skills programmes. The forthcoming Vision for Sustainable Aquaculture has an explicit objective of enhancing community benefit that arises from aquaculture across statutory and voluntary programmes.

Our Fisheries Management Strategy contains a number of actions intended to help support the resilience of the sea fishing sector, for example we supported young fishers with around £2 Million in 2021 to enter the sector through the Marine Fund Scotland. We also want to work with the fishing industry to support diversity of opportunity, for example by understanding and addressing the barriers facing women who operate and wish to progress within the fishing industry. We know that safety is a big concern for those within the fishing industry, and part of the process of making fishing an attractive career of choice is ensuring that it is safe. We are working with the Scottish Fishing Safety Group and with delivery partners to bring forward safety improvements, including the provision of funding for safety related training.

What next

Stakeholders have told us that visibility of the sector needs to be increased – both to help with recruiting and widen the appeal of seafood amongst the general population. That is why **we will explore how to encourage visibility of the sector as a career and seafood as a sustainable food source.**



Economic

Environmental

Social

Next steps



Economic

Environmental

Social

4. Next steps

This strategy affirms our commitment to the seafood sector as a key component of our blue economy.

There are a range of policies and programmes already in place designed to achieve the vision and outcomes we have laid out. This includes sector specific activity such as that falling under the **Fisheries Management Strategy** and the **Regulatory Review of Aquaculture**, more general food and drink supports, and wider programmes such as the **Islands Growth Deal** and **Fair Work and Skills**. A critical area of challenge identified was around funding available to the sector, particularly through Seafood Scotland, and the need for greater clarity of the funding and delivery landscape in general. As a result of a recommendation from the Food Security and Supply Taskforce, we will set up a business support landing webpage to collate relevant information for the sector, including marine funding. We will also continue to push for Seafish to demonstrate more clearly its role for Scottish industry and the benefit it provides.

We will support the implementation of this activity, ensuring coherence with the specific strategies for aquaculture, fisheries and the wider food and drink sectors. However, none of this can, or should, be achieved by government alone. Industry will contribute and key experts in the catching, aquaculture, processing and wider food and drink sectors will also have a key role to play, as will representatives from local authorities, enterprise networks and others who represent local communities.

Mapping out the range of activity also enabled us to identify some potential areas for future work that could add value to what is already in place.

However, the Scottish Government does not have sufficient levers to fully address the issues identified, especially around labour shortages and funding. We will continue to press the UK Government for an immigration system that meets Scotland's distinct economic and demographic needs and to make adequate funding available for the Scottish seafood sector in a way that respects devolution and does not cause duplication and confusion.

We look forward to engaging with the sector to support the progress of this important work.

5. Glossary

Blue foods are those food products we catch, farm or harvest from our marine and freshwater systems, such as fish, marine invertebrates or seaweed.

Blue economy means sustainable use of ocean resources for economic growth, improved livelihoods and jobs, while preserving the health of marine and coastal ecosystem.

Climate change mitigation means reducing human-induced climate change by reducing greenhouse gas emissions and increasing the uptake and storage of them.

Climate change adaptation means living with, and increasing the resilience to the impacts of climate change, addressing climate risks and opportunities.

Fair work is work that offers all individuals an effective voice, opportunity, security, fulfilment and respect. It balances the rights and responsibilities of employers and workers. It generates benefits for individuals, organisations and society.

Innovation means new ways of combining existing and/or new resources to better address existing and/or new needs.

Natural capital is a way of thinking about nature (natural assets including geology, soil, air, water and plants and animals) as a stock that provides a flow of benefits to people and the economy. The flow of benefits and the capacity of nature to deliver those benefits both need to be maintained, including through investment in the maintenance and enhancement of the natural assets ([see Box 1 on page 15 of Scotland's Blue Economy Vision document for more information](#)).

Net zero means reaching net zero emissions of greenhouse gases by reducing emissions of greenhouse gases as far as possible and enhancing uptake and storage of them, so that the gas emission and uptake/storage are balanced.



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