

Scottish Aquaculture Industry Leadership Group

Meeting 10 – Thursday 19th September 2019

Agenda

Attendees:	Date:	Thursday 19 th September 2019 08:45-12:40 approx. MacDonald Holyrood Hotel, Holyrood Road, Edinburgh EH8 8AU
Ministerial Lead – Fergus Ewing MSP (FE) Co-Chair Jim Gallagher (JG); Co-Chair Stewart Graham (SG); Alastair Mitchell (AM); Bill Ellis (BE); Cathy Tilbrook (CT); David Reid (DR) - Item 8 ; Ed Ley-Wilson (ELW); Elaine Jamieson (EJ); Gerry McBride (GMB) - Item 8 ; Graham Black (GB); Hamish Macdonell (HM); Heather Jones (HJ); James Withers (JW); John McNairney (JM); Julie Hesketh-Laird (JHL); Michael Montague (MM); Michael Tait (MT) - dialling in; Mike Palmer (MP); Peter Pollard (PP)	Iain Sutherland (IS) Secretary Apologies: Alban Denton (AB); Alison Hutchins (AH); Charlotte Wright (CW); David Harley (DH); Suzanne Smith (SS) Secretary	
Agenda:		Who/Estimated time:
Tea/coffee		08:45
1. Introductions		09:00 – 09:10
1.1 Approval of minutes from last meeting		All
1.2 Review of outstanding actions not on agenda		SG
2. Summary and Focus on Priority Recommendations and Strategic Priorities		09:10 – 09:20
2.1 Presentation of revised Tracker Document		SG
3. Industry update and overview		09:20 – 09:30
		JG
4. “Aquaculture to become a growth sector for Scotland”		09:30 – 10:50
The Role of Marine Scotland		Fergus Ewing MSP
• Innovation projects		SG/industry
• Innovation sites		
• Spatial planning		
• Policy development and championing		
• Fit for purpose regulation		

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<ul style="list-style-type: none"> • Regulator compliance 	
5. Next steps – how do we unlock sustainable growth?	10:50 – 11:20 SG/JHL
Coffee/comfort break	11:20 – 11:30
6. Scottish salmon market overview	11:30 – 11:45 ELW
7. Improving public perceptions of the industry	11:45 – 12:15 JHL/HM
8. Skills update	12:15 – 12:45 DR/GMB
9. AOB; Date of next meeting	12:45 – 12:50 All
Lunch/Networking	All

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Agenda Item/Meeting Date	Carried forward Summary of outstanding actions from previous meetings	Original 'Who/When'	Date Closed
Meeting 1 Item 1	AILG to review governance by early 2021	ILG – Feb 2020	
Meeting 1 Item 3.2	Update on "Quick Wins" of the ICR report	MS - Ongoing JG, SL – April 2017	

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Item	Comment/Action	Who/When?
1	<p>SUMMARY SG welcomed attendees, introducing Ed Ley-Wilson (ELW) attending his first AILG meeting and representing processing interests. Apologies noted above with MT dialling in to the meeting.</p> <p>The draft note of Meeting 9 was approved. Actions noted were in hand or complete with by exception: JW and Patrick Hughes of Seafood Scotland to present jointly to the next AILG meeting on marketing of Scottish seafood.</p> <p>ACTION JW to liaise with Seafood Scotland and present to AILG meeting 11 on marketing of Scottish seafood</p>	JW/Seafood Scotland – January
2	<p>SUMMARY SG presented for discussion the revised Tracker Document which included the new overarching priority for the industry of securing improvements in public perceptions of Scotland’s aquaculture industry. Welcoming the introduction of this new priority ELW stressed the vital role that processors and retailers had to play in communicating accurate information on the salmon farming industry to consumers and to the wider public.</p> <p>ACTION</p>	
3	<p>SUMMARY JG provided a brief update on the salmon farming industry. Global production was up ~6% year on year. Within that figure national performances ranged from a 65% increase in Iceland to 4.5% for Norway and for Chile. Prices for Scottish salmon were generally comparable with those of 2018 though prices had softened in the UK over the Summer</p>	

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	<p>months. The seawater temperature profile around Scotland in 2019 has been similar to that of 2017 i.e. around 1°C higher than in 2018.</p> <p>ACTION JG to share with AILG a short, written industry update.</p>	JG - October
4/5	<p>SUMMARY Mr Ewing led a discussion around the growth opportunity for Scottish aquaculture, which highlighted already-consented “headroom” for the Scottish salmon farming industry of up to 85,000 tonnes. Norwegian ambitions to develop a 6 million tonne industry required Scottish authorities to understand how this expansion was to be accommodated under Norwegian regulatory regimes which were compatible with EU/EEA single market requirements.</p> <p>It was recognised that the regulatory regime in Scotland had much to commend it. However, it was essential that Scotland investigate and learn from highly experienced regulatory authorities, particularly Norway.</p> <p>PP and JA presented to the meeting on modelling work being undertaken under one of the workstreams of the Salmon Interactions Working Group. AILG appreciated early insight on a line of research which was in its preliminary phase. SG requested that it be minuted that presenting decline in wild fish catch data from the 1980’s only was misleading as it is known that catch declines have been recorded since early 20th century. Additionally SG challenged the use of a statement saying communities were negative to aquaculture and asked for this to be substantiated.</p> <p>ACTION It was agreed that a short-life working group be established, co-chaired by Mr Ewing and</p>	JG – October

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	<p>JG. JG to scope out the objectives for the group which will visit Norway before the end of 2019 and will consider <i>inter alia</i> regulatory regimes, structures, attitudes, interpretations in respect of aquaculture. The group will have broad "Team Scotland" make up and would produce recommendations for consideration by Scottish authorities.</p>	
6	<p>SUMMARY ELW presented to the AILG on trends in the market for Scottish farmed salmon, highlighting the role of retail multiples in making Scottish salmon readily available to consumers in a variety of formats. AILG welcomed the content of the presentation. Market signals were strongly positive and the Scottish industry is being challenged to increase supply in response to this market pull.</p> <p>ACTION ELW to share presentation slides with AILG.</p>	ELW - October
7	<p>SUMMARY HM presented to the AILG public perceptions of the salmon farming industry. This had been researched in Tasmania and SSPO would shortly be commissioning similar research relevant to the Scottish industry. These research findings would inform future PR activity by SSPO and its members</p> <p>ACTION SSPO to update AILG on research findings</p>	JHL – May?
8	<p>SUMMARY DR and GM joined the meeting and provided an update on skills activity which was welcomed by the AILG and would shortly be presented to aquaculture companies' HR Directors' group. AILG encouraged ongoing consultation with</p>	

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	<p>industry on content of the action plan with a view to seeing more specific and concrete actions resulting from the plan. AILG also called for an increase in the pace of delivery and for the content of the plan to be prioritised in line with industry’s views of those inputs which would most speedily help deliver the ambitions of Vision 2030. I was agreed that the skills action plan should avoid any duplication of activity amongst the many different bodies involved in delivering skills. The question of dedicated resources to enable rapid delivery of the plan was raised. No ring-fenced resources had yet been identified. It was agreed that if resource needs were identified, that might threaten delivery of specific actions in the plan, then this could be brought back to the AILG to help secure their endorsement and support for additional resource to be allocated.</p> <p>ACTION SDS and HIE were asked to incorporate feedback from the Industry HR Directors’ meeting that was happening on 27 September. The presenters were also asked to provide an update on how the plan had been prioritised in line with industry expectations at the next AILG in November.</p>	
9	<p>SUMMARY There was no AOB for discussion. Date of next meeting to be late January 2020.</p>	

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Meeting 8 Item 1.4	AILG to review governance by early 2021	ILG – Feb 2019	

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Meeting 1 Item 3.2	Update on "Quick Wins" of the ICR report	Marine Scotland - Ongoing JG, SL - April 2017	

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