



INNOVATIVE RESPONSES TO THE PANDEMIC

POLICY BRIEF NO. 5 – JULY 2020

OVERVIEW

- Demand for seafood fell dramatically in the first few weeks of lockdown. The constriction of international markets and closure of much of the catering industry were the main drivers of this fall.
- Every stage of the seafood supply chain - fishers, processors, merchants and caterers - has adapted to changing demands.
- Many of these responses promote, or capitalise upon, the rising interest in local UK seafood from consumers.
- Collaboration and communication, utilisation of technological solutions, and exploration of new markets are key approaches that have led to success across the supply chain.

BACKGROUND

In response to the emerging pandemic, a sizeable portion of international trade ceased and lockdown measures were imposed across many nations. This had a deep impact on many sectors. Market prices for seafood in the UK collapsed in mid-March, creating significant economic challenges for the UK seafood industry.

On 4 June, the APPG on Fisheries heard from a number of representatives from throughout the seafood supply chain, who gave their personal

insights into how the industry has adapted in response to the COVID-19 pandemic, market closure and lockdown. The following represents a summary of their efforts and considerations for the future.

FISHERS

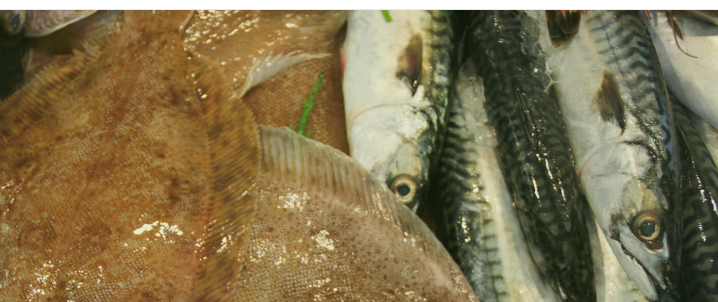
The majority of UK-caught seafood is exported (1), so the closure of international markets had a heavy impact on UK fishermen, especially since it followed a hard winter for a large proportion of the UK fleet (2).

This briefing summarises the output from the APPG on Fisheries open Parliamentary seminar, 4 June 2020. The meeting brought together stakeholders from across the sector and across the UK. Seafood industry representatives, educators and consultants, and charity and advisory body representatives met to discuss the range of responses that members of the fisheries industry have taken to adapt to the COVID-19 pandemic. This document is a synthesis of the discussions that took place both at the event and online (via #FishingResponses).

However, the conditions of lockdown meant that many consumers found themselves seeking to explore new foods, as well as support local businesses, leading to interest in local seafood consumption. This interest has been driven by a variety of factors, including publicity drives from the fishing industry itself - for example, Northern Irish fishers set up a TV advertisement campaign to promote their catches (3).

Many projects across the UK have sought to build upon this upsurge in interest by connecting the fishing industry directly with consumers. London-based business Pesky Fish, for instance, has an online platform that acts as a transparent 'online marketplace' where fishers can sell directly to consumers (4). Pesky Fish then manages the delivery. This has resulted in uplifts in revenue, especially for sales of under-utilised species. Consumers are drawn by the traceability, the direct connection with fishers, and the desire to make sustainable purchases. There is also interest from restaurants, fishmongers, wholesalers, and local buyers, and there are hopes the platform could be scaled up nationwide.

Yorwarth's Fresh Fish, a business based on England's south coast, has expanded its geographic outreach, driven by a customer-led increase in purchasing (5). This economic benefit has also allowed them to participate in a scheme providing meals for the homeless. Having formed strong links with communities with assistance from the MMO and Defra, they hope this model will persist in the future with continued governmental support.



PROCESSORS

Seafood processing is a significant industry in the UK; Grimsby, for instance, employs 5,500 people to process fish caught in the North Atlantic (6). Typically, much fish for processing comes from international markets, but this has shifted to incorporate more UK-landed fish in light of the pandemic. This is because less internationally caught fish is available and, simultaneously, more UK-landed fish has become available, as both exports and imports have decreased.

Alfred Enderby Ltd, which typically smokes fish caught by Iceland and other non-UK nations, has begun processing more UK-landed fish as international markets have slumped (6). They hope that this support of the domestic catch sector can persist after the pandemic.

They also believe that while support focused on the catch sector during the pandemic is justified, processors will also need more assistance from governing bodies going forwards. As well as providing employment, processing has a critical role promoting local seafood, especially since many consumers are only comfortable buying fish in processed form.

MERCHANTS

Fishmongers, wholesalers and other seafood merchants provide a vital link in the supply chain. Merchants have an extensive knowledge of the range of available products, and are well-placed to build a personal rapport with consumers and promote consumption of under-utilised species. This capacity has become invaluable given the shifting market as consumption of locally caught seafood becomes preferable for the supply chain.

Seafood Cornwall directly connects fish merchants to consumers through the #FishToYourDoor campaign (7). This is achieved through a bespoke

website tool, engagement with merchants via the Cornish Fish Producers' Organisation, and broad communications outputs. Now, seven merchants have been connected to over 4,000 customers.

Call4Fish was a venture set up in response to the pandemic, initially to support merchants and the inshore fleet in Plymouth. It has since grown in the face of demand to supply many areas across the UK. The programme helps connect fishers with supply links, fishmongers, and consumers. They say that linking up various regional initiatives is an important next step, as is a system for managing the variability in profitability in fishing.

CATERING

The catering industry has suffered significantly since lockdown began, principally due to the enforced closure of their premises. Rapidly adapting business models by establishing or developing takeaway services have helped ease this burden.

The Mourne Seafood Bar has kept afloat by connecting to similarly-impacted fishermen and setting up a click-and-collect 'drive-through' fishmonger's (8). This includes the sale of pre-made meals that consumers can heat at home. With support from Seafish and The Fishmonger's Company, they are making tutorial videos to show consumers how to prepare seafood. There are plans to establish a door-to-door delivery service in Belfast and increase pick-up points across Northern Ireland. They voice concern that the economic impact of lockdown will endure for the catering sector, and many restaurants may not reopen, as the combination of low footfall and high VAT may mean they would operate at a loss.

The All Party Parliamentary Group on Fisheries is supported by The Fishmongers' Company, with the Secretariat provided by Mindfully Wired Communications.



SUMMARY

The industry has responded rapidly to address the changing demand landscape in the wake of the coronavirus pandemic. This has led to more direct connections between fishers, merchants and consumers; increased uptake of technological solutions; and an encouraging surge in popularity of UK-caught species. There are hopes that these positive outcomes will persist into the future, but many believe this will rely upon continued governmental support and engagement throughout the sector.

Every stage of the seafood supply chain is interdependent upon the others, and a holistic approach is needed to ensure the seafood sector survives and thrives into the future. Although direct sales have provided a welcome alternative revenue stream, it is not feasible to replace all seafood markets with this approach. For a robust sector, a range of markets are needed, including supermarkets, wholesalers and direct sales, and the pandemic has led to a deeper exploration of this variety. Retaining the positive outcomes of the coronavirus situation is a key lesson for the future of the UK seafood industry.

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