

# FISHERIES AND FOOD POLICY

POLICY BRIEF NO. 17 - SEPTEMBER 2022

## OVERVIEW

- With seafood widely recognised to be an important part of a healthy diet, it is essential that the UK ensures a secure and resilient supply, now and into the future.
- On average, people in the UK eat less seafood than the government recommends for a healthy diet. Most of the seafood consumed in the UK is imported from abroad while most seafood produced in the UK is exported.
- Main barriers to seafood consumption are thought to be cost and lack of education or confidence in cooking seafood.
- The UK's domestic seafood market has changed in recent years, for instance through the rise of domestic marketing and supply initiatives in the early stages of the Covid-19 pandemic.
- Under increasing scrutiny, ensuring that global and UK seafood supply chains are free of labour and human rights abuses has become a priority for businesses.

## BACKGROUND

The majority of seafood eaten in the UK is imported and principally comprises only a handful of species, leaving the seafood supply chain vulnerable to political and environmental changes. There is thus a clear and urgent need to improve UK seafood security by diversifying the types of fish eaten and increasing how much of this comes from the UK. Consumer habits play an important part in this, given that diverse diets are more

resilient to changes in availability of specific foodstuffs, and enable the supply chain to pivot away from sources found to be unsustainable or unethical. When it comes to seafood, consumer choices may be influenced by a variety of factors. However, marketing and the policies adopted by government, industry, and retailers have a clear and powerful influence on how much seafood people buy, how much of this is from the UK, and how sustainable it is.

This briefing summarises the output from the APPG on Fisheries open Parliamentary hybrid event, 12 July 2022. The meeting brought together a variety of stakeholders to discuss how to better connect the seafood sector with food policy and the UK food supply chain. This document is a synthesis of the discussions that took place at the event.

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## ENCOURAGING DOMESTIC CONSUMPTION OF UK-CAUGHT SEAFOOD

### Current status of consumption of UK-caught seafood

In addition to most seafood consumed in the UK having come from abroad, most of this fish comprises just five different types: salmon, tuna, cod, haddock and prawns (1). The Russian invasion of Ukraine has highlighted the risks of relying on imported seafood - newly-introduced tariffs on Russian whitefish are creating new financial challenges in industries including hospitality and fish and chip shops which typically source a large proportion of their fish from Russia (2, 3).

The concurrent cost of living crisis is also causing consumers to cut down on how much fish they buy (4), which has likely affected sales of UK-caught as well as imported seafood. Any drop in sales of UK seafood can be expected to have a knock-on impact on the UK fishing industry, which is already experiencing challenges such as post-Brexit export difficulties and the rising cost of fuel (5, 6).

## CASE STUDY:

### How has Covid-19 impacted consumer habits towards seafood?

Research carried out by George Clark (Food Policy MSc at City, University of London) sought to understand whether UK fish and seafood consumption habits changed during the COVID-19 pandemic, and whether more direct sourcing of fish and seafood for home delivery could support the resilience of UK fishing communities. A combination of consumer surveys, focus groups, and analysis of online trends revealed that:

- Levels of seafood consumption increased during the pandemic period examined (March 2020 to March 2021).
- Seafood preparation, cooking skills, and pre-purchase knowledge improved through interacting with fish-to-home delivery services.
- Health was not a main driver for increasing seafood consumption, while home delivery of fish was viewed as a luxury.
- The media's focus on the message of eating less meat rarely pointed to fish as a more environmentally friendly alternative.
- The "food story" around the producer and supplier was essential for communicating the benefits of direct supply such as fish boxes (1).



## THE ROLE OF SEAFOOD IN PUBLIC HEALTH

UK government advice on seafood consumption is that adults should aim to eat at least two 140g portions of fish per week (7) including one portion of oily fish such as mackerel. This guidance was reaffirmed in a 2004 joint report by the Scientific Advisory Committee on Nutrition and the Committee on Toxicity (8), on the basis that this level of consumption offered significant public health benefits in reducing the risk of cardiovascular disease. Analysis has also shown that diets which follow the Eatwell Guide (7) have a lower environmental impact in comparison to the current average UK diet, with a higher amount of fish consumption contributing to this reduced impact (9).

However, in spite of health benefits and public health messaging, average consumption of seafood is currently only 1.15 portions per person per week and one portion of oily fish every three weeks (10). Affordability may be a key factor in this, with one 2018 analysis reporting that 'current food budgets of more than half of households in the UK are likely insufficient to be able to meet the government's recommendations for a healthy diet' (11). The current cost of living crisis is likely to only exacerbate this.

## CASE STUDY:

### Food Standards Scotland and seafood consumption

Food Standards Scotland (FSS) was established as the public food body for Scotland in 2015. Working independently of ministers and industry, its purpose is to provide impartial and evidence-based advice on all aspects of the food chain which affect public health. (12)

Scotland has consistently been missing its dietary goals for 17 years, with seafood consumption among these. Mirroring the picture across the UK, the poorest households in Scotland consume significantly less fish in comparison to the richest households. While little research has been undertaken into Scottish people's seafood dietary choices, it is likely that cost, preparation time, and lack of knowledge on cooking fish are significant influences.

FSS focuses its messaging on encouraging people to reduce their consumption of high-fat and high-sugar foods, as this is considered to be a more effective route to reducing the number of calories in diets, rather than promoting the positive benefits of consumption of foods such as fish. However, the agency is currently working with the Scottish government to develop dietary guidelines which take account of environmental sustainability and would likely include a role for seafood.



## Roles of government, supermarkets, fish sellers, and other influencers

By sourcing more fish from the UK, public sector procurers could significantly boost the UK seafood market (2). Supermarkets also hold substantial influence over consumer buying. For example, during the first Covid-19 lockdown, Aldi ran a “British-caught fish” promotion in all its stores (13), while Waitrose began to sell Marine Stewardship Council (MSC) certified clams from Poole Harbour after the fishery lost its foreign and local restaurant markets (14). However, these highlights are set against a trend of supermarkets closing their wet fish counters (15), significantly reducing the amount of fresh fish sold. Increased consumer demand for seafood, including UK-caught seafood, would help to reverse such trends (1).

Improving education for both adults and schoolchildren on the health benefits and preparation of seafood, and what UK seafood is available, is considered essential to increasing consumer demand for UK-caught seafood (1, 2, 12). School programmes, government campaigns and private or non-profit initiatives can all play key roles in this. Celebrity chefs can also be a positive influence on consumers in providing accessible education on healthy UK seafood recipes (12). For example, the MSC works with various chefs to promote seafood, including for its annual Sustainable Seafood Week (16), while The Fishmongers’ Company’s Fisheries Charitable Trust launched the Discover Seafood website in 2020 to connect users to local fishermen and seafood (17). Subscription services for seafood deliveries to doorsteps can also be a powerful way to engage consumers with UK seafood (1, 2), as demonstrated by their increased popularity during the Covid-19 pandemic. However, investment in processing infrastructure in coastal areas is needed to facilitate further growth in these kinds of food services (1).

## Embedding environmental sustainability

Encouraging more domestic consumption of UK-caught seafood must not come at the expense of environmental sustainability. Indeed, there is ample opportunity for synergy between encouraging consumers to eat more UK seafood and encouraging the purchase of seafood from UK fisheries recognised as sustainable, for example fisheries certified to the Marine Stewardship Council label (18). There is also optimism within the fishing industry that the sustainability objectives under the Fisheries Act 2020, and the forthcoming Fisheries Management Plans, will help drive recovery of currently overexploited fish stocks in the UK (2, 19) - thus providing consumers with a wider range of sustainable UK seafood to choose from. Finally, it has been suggested that the introduction of a “British fish” label would help consumers to avoid imported seafood products from less regulated sources, which could contain endangered, threatened, or protected species (2).



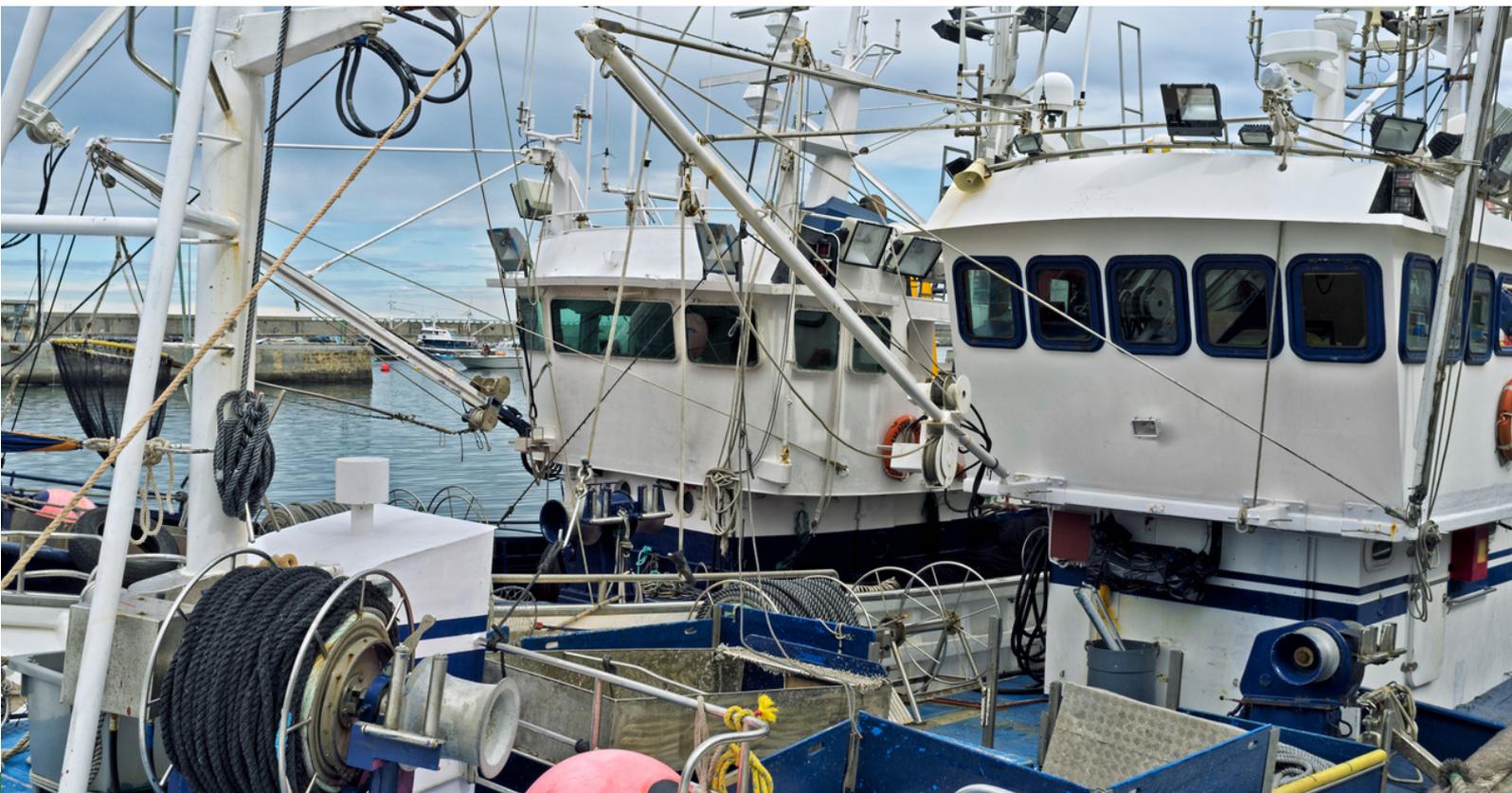
## ENSURING TRANSPARENCY AND GOOD LABOUR PRACTICES IN THE SEAFOOD SUPPLY CHAIN

Ensuring that global and UK seafood supply chains are free of labour and human rights abuses has become a priority for businesses, given reputational risk and increased consumer awareness (20). Transparency is essential to mitigating these risks, enabling businesses to carry out due diligence, although challenges in achieving this remain.

One initiative that has been created to address the issue is the Seafood Ethics Action Alliance (SEAA), a collaboration of retailers and other businesses who together represent over 85% of UK retail sales in seafood. The SEAA carries out a range of work, including analysis of which fisheries supplying the UK pose the most risk, engaging with buyers who interact regularly with supply chains to improve human rights due diligence, and engaging with governments across the world to promote the adoption and effective implementation of key international conventions, such as the Cape Town agreement on safety of fishing vessels (21).

Recent investigative work has found evidence of labour abuses in UK fisheries (22, 23). The transit visa system has been singled out as an enabler of this, and there are calls for foreign crew members to be allowed to enter and work in the UK on visas which would provide them with greater social and labour protections (23). Other measures that SEAA recommends implementing to protect fishers, including those in the UK, include effective and accessible grievance mechanisms and improved scrutiny of the recruitment process.

The seafood supply chain poses a particular challenge when it comes to directly engaging with workers, due to the at-sea nature of many operations. However, new tools are emerging that are expected to address this, for example improved accessibility of internet on board vessels for fishers and remote sensing to assess whether vessel operations are in line with declared working hours (24).



## CONCLUSIONS

It is essential to safeguard the UK's supply of seafood now and into the future, given the importance of seafood to healthy diets. However, average levels of seafood consumption by people in the UK are currently typically lower than dietary recommendations. This is likely due to a variety of factors including cost and lack of confidence in cooking seafood. Increasing consumption of seafood in general would contribute to public health, although further benefits could be realised by increasing the consumption of UK seafood specifically: greater consumption of UK seafood would support the UK fishing industry, as well as fostering diversity in the supply chain, making it easier to source seafood that has been produced sustainably and is free of labour abuses. Additionally, products entering domestic markets from domestic sources are typically easier to trace and regulate.

Government policies, for example in sourcing, offer one way to increase UK seafood consumption. Large retailers are another significant influencer of consumer habits, but consumer demand also drives retailer choices, which points to the importance of educational initiatives aimed at adults and children. The success of direct-to-consumer seafood initiatives during the Covid-19 pandemic also shows there is appetite for high-quality, "story rich" UK seafood. The delivery, marketing, and environmental sustainability of such initiatives should continue to be supported through the provision of funding and investment. The complexity of food supply chains means that imports are likely to continue to provide a significant proportion of total UK seafood consumption for the foreseeable future. However, there is ample opportunity to potentially bolster UK seafood security by increasing the share of seafood consumed that comes from the UK itself.

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