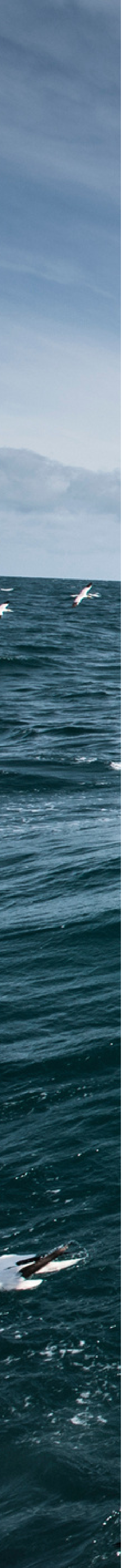
CORNISH FISHING STRATEGY 2021

CORNISH FISH PRODUCERS' ORGANISATION

C F P O

CIOS LEP

CORNWALL & ISLES OF SCILLY
LOCAL ENTERPRISE PARTNERSHIP



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FOREWORD

Since 1550 the significance of Cornwall as a fishing region has been well documented but far from looking at the past this strategy provides a forward look to build on the successes of the last 20yrs and cement Cornwall's position as the leader in English fisheries.

Today, the fishing industry is vibrant – small boats – not much larger than rowing boats fish close to rocks and reefs handlining for bass that are sought after by the finest restaurants in the land; others fish for crabs using the handed down technique of potting – their catches destined for China. Further offshore, near the edge of the continental shelf, larger vessels fish for hake, turbot and monk. This diversity in catches and fisheries is un-paralleled anywhere else in the UK and in part explains the position of dominance that Cornwall has over other parts of the UK. But it is not just about the rich diversity of species, the people here are equally diverse - from single operators to larger fleet owners - but all sharing the same passion to harvest a sustainable living from the sea and taking pride in the knowledge that consumers are willing to pay a premium to eat the high quality fish and shellfish they catch.

In the coming years, the Cornish fishing industry faces perhaps the most significant period of change in 40-years as it adapts to a re-writing of the fisheries management framework to capitalise on opportunities to enhance local fish and shellfish stocks presented by EU exit. Increased competition for marine space and limited access to fishing rights will threaten the ability of the next generation to enter into the fishing industry but without fishing boats there will be no need for portside infrastructure and the supply chains that rely on catching fish. On the other hand, increased access to stocks and more efficient catching and landing technology can help to improve economic and social returns which will lead to greater investment and increased interest in the fishing sector as a career.

Onshore a significant re-engineering of supply chains is underway. Businesses are finding new ways to improve the efficiency of the processing supply chains in order to increase the economic returns generated from each tonne of fish landed. Tougher conditions for exports have resulted in a renewed focus on domestic markets, added value (secondary) processing and high-value markets outside of the EU.

1. INTRODUCTION

BACKGROUND

In 2000, the Cornish seafood supply chain came together under the auspices of the Cornwall Fisheries Taskforce to develop an ecologically and economically coherent strategy (figure 1) to develop the seafood sector within the County to position it to best take advantage of Cornwall's new found Objective One funding status.

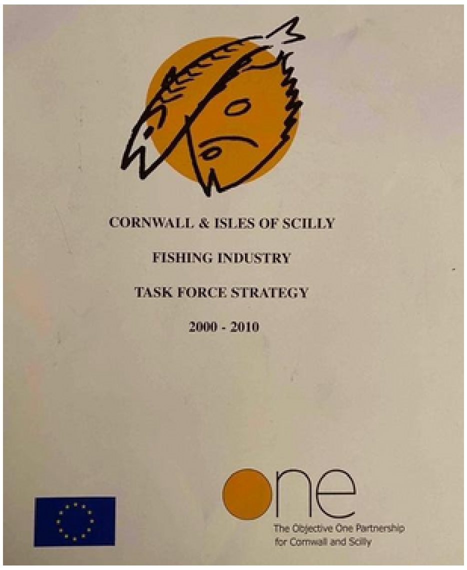

Figure 1: The Cornwall Fisheries Taskforce Strategy of 2000

KEY ACTIVITIES:

Sustainability

Training and education

Information

Marketing / promotion

Quality

Infrastructure

Tourism and public awareness

OBJECTIVE

The objective of the 2021 strategy is to update, reset and refocus the strategic vision developed for the Cornish Seafood industry by the Objective One Fisheries Taskforce in 2000 in order to develop a new, industry-led, strategy of sustainable, locally deliverable actions to strengthen Cornwall's position as the leading fisheries area in England (see annexe 2 for an overview of the Cornish fishing sector).

2. CHALLENGES AND SECTOR DEVELOPMENT – THE 4 PILLARS

This section summarises the four key themes for the seafood supply-chain that emerged through the strategy development process; these were:

i. Sustainability - Ensuring the resource in terms of fish & shellfish stocks and the marine environment remains productive and healthy.

ii. Access to the resource - ensuring the resource can be accessed – both physically – allowing vessels to use existing fishing grounds and regulatory - through access to necessary regulatory user rights (i.e., access to both new and existing fish quotas, fishing licences and vessels);

iii. Marketing - maximising the economic yield of every kg of fish harvested through marketing, promotion, accreditation, market research, New Product Development (NPD) and value-added processing.

iv. People - ensuring the industry attracts, develops, and retains crews and onshore workers across the supply chain

These have been developed into the following areas/workstreams:

2.1 SUSTAINABILITY

The industry recognises that its harvesting activities must be sustainable from economic, biological, and environmental perspectives.

Catching more fish than stocks can naturally replenish, or disturbing importing ecosystems are of no interest to the industry.

Delivering on sustainability objectives requires strong policy supported by equally robust evidence base and enforcement. Therefore, the role of accurate and timely biological and social science research is of central importance.

SCIENCE

Scientific evidence provides the central plank of credible fisheries management plans. Therefore, access to timely, robust, credible and relevant science is fundamentally essential to achieving a fishing industry that is sustainable from social, economic and environmental perspectives.

As part of the Government's £100M commitment to the seafood industry, it recently announced £24m for a three-year programme of fisheries-science partnerships to develop projects through a bottom-up approach[1].

Given the wide range of fish and shellfish stocks in Cornish waters and access to credible partners available from the scientific community within the county (Exeter University and the University of Plymouth), Cornwall should present a strong case to lead and deliver credible biological, ecological, economic and social science to support the long-term sustainability of the Cornish seafood industry. This is of fundamental importance; put simply, without productive and sustainable seas, the industry is sunk.

Whilst noting that the fishing industry has a significantly lower carbon cycle than that of terrestrial agriculture, further research is needed, locally and nationally, into vessel and gear adaptations in order to reduce the industry's dependence on fossil fuels for both fishing gears and to provide vessel propulsion[2].

1. https://www.gov.uk/guidance/uk-seafood-fund-fisheries-industry-science-partnerships-scheme#about-the-uk-seafood-fund
2. https://sustainablefisheries-uw.org/seafood-101/cost-of-food/

RESOURCE MANAGEMENT

FISHING RIGHTS

To ensure stocks are utilised within sustainable biological limits, all fishing vessels are licensed and additionally, some are restricted by catch quotas. Both licences and quotas control access to the resource and have acquired significant 'market value'. Over time these fishing rights have concentrated from a large number of small vessel owner-operators when they were first introduced into the hands of a small number of larger company vessel-operators.

In itself, this is not seen as negative as it allows for economies of scale to be achieved; however, it does present a greater strategic risk if one of these larger operators were to sell to a Scottish or Spanish company. This would effectively leave Cornwall surrounded by a sea full of fish which local fishers would be unable to catch. Based on the experiences of fishing communities, for example in Iceland, this is a real risk, as the majority of quota is now owned by large processing companies, resulting in many smaller-scale fishers going out of business and whole fishing communities lost as a result.

The risk of fish quota consolidation and dislocation in Cornwall was first identified by the Duchy Fish Quota Company (DFQC) in 2000 as it sought to ringfence quota in Cornwall through a leaseback scheme. Further scaling up of this (or similar) approach is now needed to guarantee future access to the fishery resources that surround Cornwall so that the value of offshore and onshore value activities can be captured in the local economy. In turn, this retention of quota for the local fishing industry will help to achieve both local economic objectives whilst also contributing to the Government's levelling up agenda.

As the value of these 'fishing rights' has increased, the entry cost has increased and the "ladder of progression" for younger people into the industry has shortened as it is challenging for young people to progress to larger vessels due to the high costs involved. This shift in vessel and quota ownership from skipper/owner to company ownership provides less socio-economic benefits to local communities and, crucially, is seen as a glass ceiling, preventing the next generation of fishers from owning their own vessels and, as a result, not remaining in the industry and thereby, impacting on recruitment and retention.

FISHING GROUNDS

Due to biological preferences of different species and aggregation of these on different seabed types, the distribution of fish and shellfish stocks is non-linear and as a result, some areas of the seabed are known to be rich fishing grounds for decades and others are known to be less productive. Therefore, securing continued access for Cornish fishing vessels to these productive grounds will be of increasing importance going forward as competing uses for marine space emerge.

Historically, access to grounds was purely limited by size and type of vessel, but in the near future areas of the sea may be closed to fishing either through Marine Protected Areas (MPAs), as a means of environmental protection, or through the exponential development of the offshore renewable energy sector supported by Government and local public bodies. Balancing these emerging and potentially competing uses of existing fishing grounds will be critical to the long-term future of the Cornish industry.

In respect of offshore marine renewable energy, Cornwall has promoted the seas off its shores as ripe for development through Floating Offshore Wind (FLOW). Here wind energy turbines are mounted on platforms and anchored in place through a system of four anchors on the seabed. This method of wind energy development is particularly suited to offshore Cornish waters as these can be fixed in greater water depths than the traditional monopile arrangements that have been seen in larger parts of the shallower North Sea. However, this gain to the county's green energy ambitions is not without the potential cost and the combined 'spatial squeeze' was seen by over 60% of fishermen surveyed as one of the most significant future challenges[3].

3. The CFPO conducted a survey with 100 members of the catch sector in August 2021

2.2 MARKETING

Since becoming an independent coastal state, the industry faces new challenges accessing the EU export market. With non-tariff barriers affecting all businesses, there is an emerging need to maintain and navigate access to existing markets, but also develop new opportunities to sustain and evolve the supply chain in the face of global competition.

Disrupted market access is coupled with an increased presence from the Environmental Non-Governmental Organisations (eNGOs) community, who are becoming major influencers of consumer behaviour and public policy. This is leading to increased awareness of the environmental impact of the fishing industry and increased demand for traceable and sustainable seafood.

The fishing industry can respond to these new market challenges and consumer demands. Seafood is one of the healthiest and most sustainable protein sources available and has a relatively low carbon output compared to other animal protein sources[4]. The industry can provide the evidence, data and facts that build the essential narrative to engage and inform consumers and be proactive about how it is operating sustainably, be it catch method, carbon output, provenance and traceability.

In doing so there are increased opportunities to add value to the existing catch, develop new markets and customers, as well as educating the public on the fishing and seafood industry.

PROMOTION AND COMMUNICATION

It is a critical time for the industry to work collectively and share a coherent and cohesive voice when engaging with the public. The industry is regularly in the spotlight, from mainstream national TV to on-demand global documentaries, but messages can be mixed and varied, leaving consumers confused about making ethical choices. Informing consumers from an industry viewpoint is essential to demystify some of the complexities of sustainable sourcing.

Sound science and stock health and a responsible and well-managed fleet are what underpins any marketing, promotion, and communication of the industry. With the eNGOs spotlight consistently on the fishing industry, Cornwall must demonstrate and lead on the introduction of fishery management plans in order to have the necessary components in place to be able to positively and honestly articulate itself as a sustainable fishery.

Seafood Cornwall was established in the early 2000s and is a well-respected industry-led consumer facing marketing platform. Seafood Cornwall reinvigorated itself in 2019, effectively becoming the marketing arm of CFPO. It has its own digital presence that is already delivering a range of projects that educate the public about the diversity of species caught and landed by the Cornish industry.

The use of Seafood Cornwall as a collective voice for the industry offers simplified and unified communications. However, its scale and reach needs to be expanded to 2004 levels in order to support a broad programme of work needed to meet the industry demands to address market failures resulting from EU exit.

CONSUMER INFORMATION AND ACCREDITATION

Accreditations, such as the Marine Stewardship Council (MSC), offer a simple choice for the consumer when purchasing seafood, as they trust the policies designed to ensure they are making a safe and ethical purchase. However, the industry has the ability to engage with and educate consumers to become more knowledgeable about what fish and shellfish are local to them, species seasonality and abundance, the range of catch methods, and lesser known and underutilised species, so that they can make their own decisions without relying on accreditations.

4. https://sustainablefisheries-uw.org/seafood-101/cost-of-food/

NEW PRODUCT DEVELOPMENT / INNOVATION AND ADDING VALUE

As the UK aims to nurture and further develop a domestic market for its fish and shellfish, there is a need to meet the capabilities and comfort level of the UK consumer. Other protein sources currently dominate the value-added meal section of any major retail supermarket. This presents an opportunity for the seafood-processing sector to focus on innovation and new product development to enter this space and compete with other protein sources offered in retail supermarkets.

Market research and product development can be driven by the processing sector. The use of undervalued species to create these products has the opportunity to increase demand and raise the first sale price for lesser-known species such as Megrim Sole and Spider Crab.

Further innovation focusing on reducing waste across the supply chain and developing new products from secondary processing methods offers additional added value opportunities.

2.3 PORT INFRASTRUCTURE

With a total of 47 landing sites across the county, it is vital to not only maintain ports, harbours and coves, but also to modernise to meet the demands of the industry. Investment in the necessary shore-based infrastructure is critical from a safety point of view, but to also improve the efficiencies of landing, quality of the catch and build self-sufficiency in remote small harbours and coves. Any shore-based infrastructure investment will need to take into account the future economic viability of the port, harbour or cove.

BIG PORTS

Newlyn, a Trust port, is the largest port in England by vessel numbers and quantity (tonnage) of landings. Landing dues generate income and its primary function is to serve the fishing fleet. The key factors that make Newlyn a major port are its westerly location, daily market, ice supplies, fuel, landing and berthing facilities, and tidal access 24hours a day. These facilities have been enabled with EU and national funding investment over the last two decades. Lack of development space and road access are factors that limit future developments, but long-term plans for the Sandy Cove site offers opportunities for shore-based services to invest and serve the fleet.

SMALL PORTS

After Newlyn, the ports of Looe, Mevagissey, Helford, Falmouth/Mylor and Padstow are all significant in terms of vessel numbers and value of landings. The majority of these harbours are managed as a Trust and many have taken advantage of EU and national fisheries funds to modernise landing and gear storage facilities, as well as a supply of ice and cold store facilities for improving catch quality.

Other smaller ports such as St Ives and Newquay are owned and managed by Cornwall Council and have benefitted from investment since 2000.

COVES

Places such as Cadgwith and Sennen are active fishing coves where boats launch from the beach or slipway with the aid of winches and tractors. Cove fleets are primarily made up of under 10m, or under 8m, single-handed static gear fishing vessels. Although they have lower volumes of landings and are susceptible to poor weather and sea conditions, they remain strong fishing communities and focus on day caught, high quality and high-value species.

To maintain these historical fishing communities, it is critical to invest in their shore-based infrastructure, which allows them to remain self-sufficient and reduces the need to travel and work from other larger ports. Investing in storage, ice, fuel, and cold rooms greatly benefits the vessels operating from remote coves. However, increased pressure from other industries, particularly tourism, poses risks to smaller coves and communities.

RECRUITMENT, DEVELOPMENT AND RETENTION, OFFSHORE AND ONSHORE

There are distinct differences between recruitment and retention, ultimately, they are intrinsic, but different strategic interventions are required to address them.

RECRUITMENT

With an ageing workforce in the catching sector and reliance on migrant labour for both onshore and offshore sectors, businesses recognise the need to invest in new ways to attract new entrants, including women who currently are underrepresented in the catch sector, into all parts of the supply chain. Whilst needing to be aspirational and promote the employment opportunities available, it is important to reflect honestly to ensure those entering are aware and prepared for the career route ahead. Working unsociable hours, time away from home and physically demanding labour are all parts of working in the fishing industry.

However, for those attracted to this work environment, there are significant career and business opportunities, as well as serving as a gateway to other maritime occupations.

Promotion of onshore and offshore careers is minimal, with limited engagement with local and regional schools, mainly due to the lack of a recognised career pathway, the way the industry currently recruits and the 'share fisherman' payment status.

The catching sector has reflected on the need to better engage with school leaver age groups in recent years. As a result, it has established a Trailblazer group, which in 2021 created a new national fishing apprenticeship standard. The apprenticeship standard offers a clear, professional pathway, combined with recognised, formal qualifications. If adopted and supported by the necessary partners, it will provide a new way to attract, recruit, train and mentor new entrants into the industry.

The industry has an excellent resource of experienced instructors, both active and retired fishermen and other maritime professionals. Improving links with wider maritime services in the county will ensure a career in fishing is advertised on a similar platform to other maritime occupations.

DEVELOPMENT AND RETENTION

Once trained and in the catching sector, there are additional barriers to overcome for those wishing to establish themselves further. The two major challenges are accessing finance for purchasing a vessel and accessing quota to enable fishing opportunities. Without access to either of these, most will be limited to the small inshore fleet, where vessels are more affordable and have the ability to target seasonal, non-quota species.

A key strength of the Cornish fleet is that its diversity of vessel size and catch method. For the fleet to sustain itself and the supply chain that depends on the volume and variety of species, it is necessary to continue supporting the development of upcoming individuals to purchase vessels and access quota. Costs for vessels, licences and quota have risen significantly since 2000. Help to buy boats and help to access quota schemes are ways to ensure there are career progression opportunities once established in the industry.

Current shore based training facilities are adequate for the delivery of introductory courses. Developing the training infrastructure to meet the needs of the industry and deliver courses to address the skills gaps, e.g. new entrant fishing apprenticeships, higher level Class 2 qualifications, would support and encourage recruitment, career development, and retention.

Establishing recognised support networks to facilitate peer to peer learning would also offer ways to build retention and encourage career development within the sector.

3. CROSS-CUTTING THEMES

These are themes that emerged from stakeholder discussions, internet surveys and workshops across engaging those across the Cornish seafood supply-chain.

EMERGENCE OF YOUTH / ENGAGEMENT

All sectors of the Cornish seafood industry recognised the scale of the challenge of meeting growing demand in the workforce through engagement and outreach to young people. The industry has been proactive in this area for several years. Still, there was broad agreement that steps to address this need to be bolder and go further than previous attempts, such is the scale of the issue and its potential to impact the future viability of the sector.

COMMUNICATION / COORDINATION WITHIN THE SECTOR / PUBLIC SECTOR

The catching sector of industry represents itself directly to local Government Departments, MPs and Ministers. Still, the industry understands that it does not exist in a silo and seeks more significant engagement with the public sector in Cornwall. The Cornish Fishing Industry needs to speak with one voice and the need to improve communication with the public sector in Cornwall was recognised.

LEADERSHIP / DELIVERY

The industry recognises it faces a number of high-level challenges in the next 20 years and is committed to addressing these through collaborative strategic actions.

To implement these activities across the sector will require strong leadership and support from the public sector to provide capacity as across the industry there is limited capability to drive, deliver and manage projects.

This could take the form of a Fishing Industry Development role, which has been created to support the fisheries sector in Plymouth.

CLIMATE CHANGE

The industry recognises that climate change is an irreversible process and the importance of initiatives at every level to mitigate the impacts of climate change and build resilience. The industry is built around the harvesting of wild fishery resources that are themselves highly sensitive to climatic conditions. The growing resurgence in certain fish and shellfish stocks (e.g. crawfish) and rapid demise of others (e.g. cod) provides evidence of this.

Therefore, the industry is reactive in terms of catching, processing, and marketing changing species as and when they emerge. The industry now seeks proactive engagement with fisheries management to ensure that the UK Fisheries Bill has sufficient flexibilities to enable the targeting of ‘new’ fisheries should these emerge as a result of climate change. Working with fisheries management organisations, local research institutions and others, the sector will work to establish a local monitoring system to assess the impact of climate change and identify measures to accommodate changes.

4.0 SYNERGIES

These are defined as themes that are much broader than the fishing industry and are national or international shared goals, targets and aspirations. With this in mind the fishing industry seeks to align and collaborate with wider regional bodies and sectors in order to adapt to the changing environmental landscape through global technology solutions.

Further to this, the industry recognises Cornwall Council's commitment to make Cornwall the UK's first carbon net-zero area by 2030, a commitment which is backed by central government. Linkages to national strategies on UK-wide issues such as de-carbonisation or workforce equality are highlighted and actions to respond to those will be at national level.

GREEN ENERGY

The present UK Government is committed to ambitious net zero-carbon energy production by 2040 and has highlighted the important role offshore renewable energy will play in meeting this target. Cornwall has a net-zero target of 2030 and has been recognised by central Government as becoming the first net-zero region in the UK.

Though other forms of offshore renewable energy are available, the main commercially viable option at the moment is offshore wind. Shallower parts (i.e. less than 30m water depth) in the North Sea and Irish sea have seen significant offshore wind developments under Rounds 1-3 of the Crown Estate seabed leasing over the last decade.

However, to meet Government targets, a significant change in offshore wind energy production is required. To meet this demand, it seems likely that Floating Offshore Wind (FLOW) will be used to deploy wind driven energy generating turbines in areas of sea considered too deep for existing monopiled turbines. This change in technology will enable previously un-tapped areas to be delivered – most notably the Celtic Sea (North Cornish waters) though initially limitations to national grid connections in Cornwall will mean that these developments start in areas within 100km of the Welsh coast.

The fishing industry sees the development of offshore wind in Cornish waters as one of the most significant risks but also recognises the equal potential for opportunities and is keen to explore these synergies in the short term.

In addition, the sector recognises that further research is needed, locally and nationally, into vessel and gear adaptations to reduce the industry's dependence on fossil fuels.

MARINE ENVIRONMENT

Since the production of the last strategy, the fishing industry has become a focal point for the eNGO community, facing challenges on fish sustainability, habitat degradation and worker welfare. Wherever possible the industry through its representative structures CFPO, NFFO and Seafish has been proactive in developing solutions to issues or engaging in dialogue groups to build a common language on a wide range of issues in the marine environment.

The previous strategy supported some of this work with the ground-breaking 'Invest in Fish' partnership between the fishing industry, WWF-UK and Marks & Spencer. This latest strategy outlines a similar approach where industry is fully engaged, involved with eNGOs, Government departments and other Statutory Nature Conservation Bodies (SNCBs) on the siting of Marine Protected Areas (MPAs) and High Protected Marine Areas (HPMAs) where decisions are based on sound scientific advice.

DE-CARBONISING INDUSTRY

In common with heavy industries across the globe, the fishing industry is currently largely dependent on oil-derived fuels and lubricants to power the fleets at sea and to underpin the distribution and delivery networks for finished products.

The Cornish fishing industry accepts this challenge, and notes that further research is needed, locally and nationally, into vessel and gear adaptations, which reduce the industry dependence on fossil fuels.

Actions will be required at a local, national and global level in order to address the technological challenge of providing 500kw of uninterrupted power from an engine or motor device unit output for up to 7-days at a time in an environment where weights are an important consideration for vessels stability.

With these factors in mind in the real world, practical solutions, especially for the off shore fleet, that the fishing industry requires appear some years away and in the interim, the industry seeks Government support to re-engine vessels with more efficient power units that would provide stepped improvements in emissions and delivery significant health and safety benefits. Locally collaboration across sectors will be looked at, including the agricultural sector where research on alternative fuels is already taking place.

SHORELINE MANAGEMENT

Shorelines management plans (SMP's) must be considered for any future shore-based infrastructure development.

With many of Cornwall's harbours and fishing communities designed decades and centuries ago, there must be a consideration for a changing climate and the impact of sea-level rise. Therefore, aligning any future developments and investment with the shoreline management plans is essential.

Also important will be the safeguarding of areas to maintain use for the sector where alternative uses might be considered, both in relation to ports and buildings, to resist pressure from other sectors, most notably tourism.

5. CONCLUSIONS AND RECOMMENDATIONS

CONCLUSION

The Cornish fishing industry remains the most economically and visually significant of any part of England, accounting for 20% of the English fleet by number and 14% of the total £187M worth of fish and shellfish landed in English ports in 2020. It provides vital employment in communities with little or no economic hinterland and provides social cohesion and touristic appeal throughout the county.

Following the delivery of key projects recommended under the previous Fisheries Taskforce 2000 strategy, the industry has changed significantly in the last 20 years with positive developments in marketing and promotion, sustainability, training, quality and port infrastructure flowing from the previous strategy and funding opportunities available at that time.

However, despite demonstrable improvements in many areas, some key historic challenges remain and other, new challenges are emerging. The industry and its leadership bodies are seen by Ministers and senior Defra officials as the leaders in progressive partners fisheries management and marketing as they grapple to develop a new fisheries management framework.

Alongside the recently announced £100m UK Seafood Fund this high-level support provides a clear opportunity for Cornwall to steer both local and national policies through further development and delivery of strategic projects aligned to both Cornish and UK Government objectives and strategic positioning to benefit from crossing cutting themes in the County such as offshore renewable energy and Cornwall as a world-leading food tourism destination.

RECOMMENDATIONS

This report provides a high-level strategic review and update of the previous strategy. In order to implement elements of this new strategy, it is recommended that industry, Cornwall Council and CIoS LEP work collaboratively to:

1. Undertake further research to fill vital gaps in knowledge; and
2. Support further development of strategic project ideas into fully-costed, stakeholder tested and risk assessed project proposals along with identification of funding sources (see table).

6. RISKS AND MITIGATING ACTIONS

Theme	Description	Likelihood of occurrence	Impact if occurs	Severity	Mitigation project / workstream	Lead organisation	Partners	Potential Funders	Indicative Costs (£)
Sustainability	Collapse of key resources	Low	High	High	- Establishment of Cornwall Fisheries Science board to commission fisheries science in the county	CFPO, CIFCA	Cefas, Defra, Exeter Uni, Plymouth Uni	FaSS, SIF, UKSF	£10k pa to facilitate
Sustainability	Sales of quota outside of Cornwall restricting access of local vessels to fishery	Medium	High	High	- Quota purchase by community body (CFPO; DFQC) or Council	CFPO CC DFQC	DFQC, Defra	Public (CC) Private	£1-10m
Sustainability	Floating offshore wind developments displacing fishing fleet	Medium	High	High	- Ensuring fishing industry is represented in the planning process - Demonstrate the value of fishing to Cornwall – beyond first sale value	CFPO	Crown Estate, Developers, NFFO CC	FaSS, SiF, Maritime Charities	£50k
Sustainability	Climate change, meeting net zero	High	Medium	Medium	- Innovation investment in new propulsion systems - Innovation in gear technology to reduce impact on marine environment	Private sector	Seafish NFFO Defra	Private Seafood Fund, FaSS	£50k pa As well as national and global activity.
Maximising value	Market failure due to reduced access to EU markets and / or sustainable sourcing policies	Medium	High	High	- Cross sector marketing and promotion of Cornish quality brand 'Seafood Cornwall'	CFPO	Seafish, Seafood Cornwall, Private sector	FaSS, UK Seafood Fund	£50k pa
Maximising value	Market failure due to sustainability concerns	Medium	Medium	Medium	- Reputation management approach through evidence / science led B2B and B2C comms - Support MSC certification of further species to secure market access	CFPO CFPO	Seafish, Seafood Cornwall, Private sector Seafish, Seafood Cornwall, Private sector	FaSS, UKSF, FaSS, UKSF,	£20kpa £50k pa
Maximising value	Market failure due to low demand or changing consumer preferences	Medium	Medium	Medium	- Support New Product Development (NPD) for new or under-utilised species or new processing techniques	Seafood Cornwall	Private sector		£10k pa
Ports and infrastructure	Low level engagement and understanding of needs within public sector	Medium	Low	Medium	- Establishment of a Cornwall Fisheries Council (CFC) to discuss issues and actions	CFPO	CC, CIOSLEP	FaSS	£1-5K pa
Ports and infrastructure	Loss of 1st sales to auctions outside Cornwall	Medium	Medium	Medium	- Commission review ports and auctions and provide projects plans / actions to mitigate against this risk	CFC	Harbour commissioners, CC	FaSS	£20k
Ports and infrastructure	Onshore supply chain logistics becoming un-viable	Medium	Medium	Medium	- Commission review of road transport logistics and provide actionable plans to reduce carbon footprint and improve efficiency.	CFC	Seafish, Seafood Cornwall, Harbour Commissioners, CC	FaSS	£25k
Ports and infrastructure	Plastics and end of life gear	Medium	Medium	Medium	- Modernising ports and waste collection facilities - Recycling and upcylcing of end of life fishing gears	Harbours, private sector	CFPO, Fishing for Litter, Odyssey Innovation, Fishy Filaments	Seafood Fund, FaSS	£20k pa

Recruitment, development & retention	Shortage of qualified skippers in 5-10yrs	High	High	High	- Conduct a skills analysis assessment for the current workforce / fleet - Proactively target young crew to engage in a port-based Class II skippers ticket programme - Skills centre development for advanced training	CFPO, SFC-T	Seafarers, Seafish, NFFO, Fleet owners	Seafish, FaSS, Seafood Fund.	£20k £100k
Recruitment, development & retention	Shortage of crews	High	High	High	- Development of project / business plan for safety and training vessel - Full adoption and commitment to Fisher apprenticeship standard delivery - Apprenticeship employment agency to support small businesses employ	CAC	Seafarers uk	FaSS, Seafarers UK	£20k
Recruitment, development & retention	Staff shortages and skills for onshore processing sector	Medium	High	High	- Conduct a skills analysis assessment for the current processing sector workforce	Seafood Cornwall, CAC	CAC, Seafish, SFC-T	FaSS, Seafish	£20k

Key themes:

1.Resource Sustainability: Science & information; access

2.Maximising value: Marketing, Promotion and Development

3.Ports & infrastructure:

4.Recruitment, development & retention

Abbreviations:

1.CC - Cornwall Council

2.CFPO – Cornish Fish Producers Organisation Ltd

3.DFQC – Duchy Fish Quota Company Ltd

4.CAC – Cornwall Fisheries Council

5.SFC-T – Seafood Cornwall Training

6.Cefas – Centre for Fisheries and Aquatic Science

7.FaSS – Fisheries and Seafood Support scheme

8.SiF – Seafood Innovation Fund

9.UKSF – UK Seafood Fun