

Cross-Party Group on Food AGM

11 September 2024 at 6pm, Committee Room 4
and Teams

Minute

Present

MSPs

Annie Wells MSP (Chair)
Rhoda Grant MSP (Co-Chair)
Colin Smyth (Co-Chair)

Non-MSP Group Members

In person

- Kirsty Tinsdale, Food and Drink Federation Scotland/CPG Food Secretary
- David Thomson, Food and Drink Federation Scotland
- Hannah Fennell, Scottish Fishermen's Federation
- Colin Smith, Scottish Wholesale Association
- Sally Measom, Company Shop Group
- Pete Ritchie, Nourish Scotland
- Kirsty Tait, Food, Farming and Countryside Commission
- Lorna Dawson, James Hutton Institute
- Jules Griffin, The Rowett Institute, University of Aberdeen
- Ann Packard, RSA Fellows

Virtually

- Elaine Jamieson, Highlands and Islands Enterprise
- Jonathan Sayer-Mitchell, Tritonia Scientific Ltd
- Cat Hay, Food and Drink Federation Scotland
- Iain Clunie, Food and Drink Federation Scotland
- Joe Churcher, The Rowett Institute, University of Aberdeen
- Laura Thomson, MECOPP
- Claire Perier University of Edinburgh
- Baukje de Roos, The Rowett Institute, University of Aberdeen
- Tilly Robinson-Miles, University of Edinburgh
- David Watts, The Rowett Institute, University of Aberdeen
- Andrea McColl, Highlands and Islands Enterprise
- Stephen Kelly
- Liz Barron-Majerik, Lantra Scotland
- Christine Fraser, Food Training Scotland

- Jane Bunting , the Royal Environmental Health Institute of Scotland
- Martin Meteyard, Co-operative Consultant
- Ruth Watson, Keep Scotland the Brand
- Simon Macdonald, Fisheries and Processing Consultant
- Sterre Vester , SAC Consulting (Part of SRUC)
- Viv Collie, Eat and Drink Dundee

1. Welcome and Apologies for Absence

Annie Wells MSP (AW) welcomed all to the meeting and apologised that we were experiencing technical issues with feedback in the room.

Apologies were received from:

- Elena Whitham MSP
- Brian Whittle MSP
- Mary Brennan, University of Edinburgh
- Ian Muirhead, Agricultural Industries Confederation
- Keith Robson, The Open University
- Jayne Jones, NHS Greater Glasgow and Clyde
- Sandra Williamson, The Royal Environmental Health Institute of Scotland
- Abi Mordin, Propagate
- Jon Wilkin, Abertay University
- Alistair Williams, National Manufacturing Institute Scotland
- Michelle McWilliams, The Rowett Institute, University of Aberdeen
- Peter Faassen de Heer, The Scottish Government
- Nicola Holden, SRUC
- Archie Gibson, Agrico
- Howell Davies, Interface
- Mary Lawton
- Caroline Timmins, SCFDI
- Robert McGeachy, Food Standards Scotland
- Kirsty Jenkins, OneKind
- Wendy Barrie & Bosse Dahlgren, Scottish Food Guide
- Bill Crosson, IFST
- Jackie McCabe, The Royal Environmental Health Institute of Scotland
- Ceri Ritchie, SAC Consulting (Part of SRUC)

2. Minutes of the Last Meeting (27 February 2024)

The minutes of the last meeting were proposed by Simon Macdonald and seconded by David Thomson and therefore approved and noted as a fair reflection of proceedings.

AW noted that the minutes has been sent to the Scottish Government's Good Food Nation team as part of the consultation on the Good Food Nation National Plan consultation.

AW reminded members of the group that minutes from these meetings are publicly available and so if you feel anything needs corrected please get in touch with [Kirsty Tinsdale](#).

3. Matters Arising

AW thanked everyone that had put forward ideas for themes for future meetings, this led to the blue economy focus of this meeting. Kirsty Tinsdale is looking through all the ideas to plan the meetings for next year.

4. Election of Co-Conveners and Secretariat

Colin Smyth MSP proposed the election of the Co-Conveners, Ann Packard was the seconder, the following were elected:

Co-Conveners

- Annie Wells (Conservative)
- Rhoda Grant (Labour)
- Elena Whitham (SNP)

Colin Smyth MSP proposed the election of the Secretariat, Jules Griffin was the seconder, the following were elected:

Secretariat

- Kirsty Tinsdale, Food and Drink Federation Scotland

5. What does the Blue Economy mean for food and drink?

There were presentations from:

- **Hannah Fennell (HF), President, Scottish Fishermen's Federation**

The key points from HF's presentation included:

- The Scottish Fishermen's Federation - represents eight constituent associations from all around the Scottish coast, with over 400 boats, varying in size from under 10m creel boats to 70m pelagic boats, fishing everything from crabs and prawns to cod and haddock.
- The blue economy outcomes include environmental, economic, and social outcomes many of which are interlinked.

- Fishing is a prime example of how a Scottish marine sector can support – and be supported by - the Scottish Government’s blue economy vision.
- Fishing is incredibly valuable to Scotland and its communities - with over 400 thousand tonnes of seafood landed each year, with a value of £784 million.
- The fleet directly employs over 4,000 fishers, and indirectly supports over 100 shoreside processing businesses which have a GVA of £505 million.
- This economic activity, innovation and employment is occurring in Scotland’s coastal and island communities.
- Fishing’s economic contribution to coastal and island communities is huge, in 2022 - £12 million was landed into Stornoway and Campbeltown, £7 million to Eyemouth, £20 million to Ullapool, and £82 million to Shetland.
- Unlike the rest of the UK, the majority of Scottish fishing vessels are family owned, and the vessels are usually based in the communities where the family lives.
- This has the benefit of short supply chains, local food for local people.
- The fish and shellfish landed in Scotland is key to Scotland’s Net Zero vision - studies show wild fisheries produce significantly lower amounts of CO2 during production than other sources of protein.
- Globally, Scotland’s fisheries also play a central role in food security: as well as local consumption, Scotland exports its products all over the world.
- The challenge of food security is not going away, it will only increase as our population grows, and fishing is central to any food security strategy due to its low-carbon nature. Studies have found that if were to remove fish as a protein source, we would need 22.3 times the world rainforests area to turn into grazing areas if we were to try and replace global fish production with other food sources.
- Fisheries rely on healthy, functioning ecosystems.
- Many vessels act as floating laboratories using equipment to collect environmental data such as water temperature and salinity which can ultimately used by scientists to better understand our oceans.
- Fishers’ ecological knowledge is being incorporated into conservation measures as fishers work with scientists and policy makers to help monitor the impact of climate change on marine ecosystems, as well as identify priority marine features for conservation.
- The blue economy gives fishing a lot of opportunities. This includes:
 - Shared and improved port-side infrastructure
 - Advances in research and development which allow Scottish fishing businesses develop electric fishing vessels
 - Blue clusters which allow knowledge exchange and expertise development for example, a mackerel processor in Peterhead has invested in technology originating from the aquaculture sector which will allow them to automate parts of the process which previously could only be done by hand.
- However, the blue economy also comes with challenges as other blue sectors grow and expand there is increased competition for space.
- From a fishing perspective this is worrying. There are different activities which are currently restricting fishing within our waters.

- By 2050, there could be a loss of over 55% of fishing grounds in Scottish waters due to the spatial footprint of other sectors such as renewable energy, cabling, aquaculture sites, as well as government policies.
- Many of these developments, such as offshore wind, are sited in key fish spawning areas, and their long-term impact on fish spawning patterns and the health of fish stocks as a whole is still unknown.
- Smart planning, and investment in monitoring and assessment is needed so unintended consequences can be identified and addressed.
- Different sectors need to work together to identify and capitalise on synergies and minimise conflicts to ensure that we can all thrive in the blue economy and meet the blue economy objectives.
- **Elaine Jamieson (EJ), Head of Food and Drink and Life Sciences and lead for the Blue Economy, Highlands and Islands Enterprise**

The key points from EJ's presentation included:

- Nowhere in Scotland is further than 65 kilometres from the coast, the sea is woven into the very fabric of life in Scotland and is part of our national identity.
- Marine Scotland estimates the area of Scotland seas is 617,000 kilometres. That means that Scotland's seas are six times larger than the land area and account for 63% of the UK Exclusive Economic Zone.
- Understanding what goes on in our sea and the interconnectivity of what goes on in our seas, is really important. Scotland's coastline is estimated to be almost 19,000 kilometres in length – that's almost two thirds of the total UK coastline.
- There are approximately 75, 500 jobs in the marine economy and that equates to about 3% of all Scottish employment. These sectors are diverse, ranging from oil and gas to offshore marine renewables, decommissioning ports and harbours, fisheries, aquaculture, seafood processing, marine biotechnology, marine tourism, marine environmental services.
- Marine resources need to be managed sustainably, and nations need to take coordinated action to drive forward transformation change in the face of the climate crisis.
- Scotland's blue economy supports multiple – and often interconnected - sectors including food production, energy generation and lifeline transport.
- The Scottish Government's [A Blue Economy Vision](#) for Scotland sets out the national long-term ambition for Scotland's blue economy to 2045. It notes that the shared stewardship of our marine environment supports ecosystem health, improved livelihoods, economic prosperity, social inclusion and well-being.
- Fishing has sustained Scotland for centuries. The industry has evolved in recent decades, the northeast and Shetland, have become leaders through investments in new state-of-the-art vessels, landing facilities and fish markets.
- Scotland is a world renown producer of wild caught and farmed fish and shellfish.
- In 2022 Scottish vessels landed 429,000 tonnes of sea fish and shellfish with a gross value of £617 million.
- In 2022 289,000 tonnes of sea fish and shellfish with a value of £480 million were landed into Scotland.

- The challenge for Scottish processors is peak time processing capacity, given the limited numbers of processors who have the necessary scale and capacity to deal with single landings of thousands of tonnes of fish.
- Aquaculture, especially Atlantic salmon production has grown substantially. The industry is now dominated by a small number of large producers who farm in the Northern Isles and on the West Coast.
- These large profitable businesses have invested to improve fish welfare and to reduce and mitigate environmental impacts and to improve productivity.
- In 2022 Scottish Salmon, farmed in the north isles and west coast, was the UK's main food export worth £578 million and exported to more than 50 countries worldwide.
- Scottish salmon adds over £760 GVA annually and the sector creates over 10,000 jobs.
- In 2022 the production of mussels was 10,311 tonnes whilst 3.9 million Pacific oysters were produced.
- Aquaculture products are recognised as essential for global food security and nutrition – an important part of Scotland's Good Food Nation ambitions.
- The world population is expected to increase by nearly 2 billion by 2050 and could peak around 10.4 billion by 2050.
- Proteins are critical to maintaining human health. Sustainable seafood from Scotland will contribute to human health and food security, both home and overseas.
- Different types of seafood have different carbon footprints, it's broadly recognised that the footprint of seafood protein for human consumption is lower than most alternatives.
- Sectors are proactively gathering data to better understand the footprint and to inform improvements and provide evidence to the customers.
- We have the best in class scientists and an academic community in Scotland that works in partnership with our industry using the latest knowledge and technologies to gather information, to understand and monitor the impacts on the environment.
- There is no such thing as seafood waste with guts, bones, heads, skins, shells and being used to create fashion, fertiliser, pet food, packaging solutions and medical therapies.
- Scotland offers abroad geographical innovation environment that can support the development of excellence in science, technologies and automation to ensure the sustainable growth of the industry.
- Challenges exist in areas such as fish stock management, rising water temperatures, ocean acidification, marine pollution. That means that marine environmental services are even more important to monitor and mitigate the impacts on the natural capital that supports these important sectors.
- Businesses in the blue food sectors survive by producing products that the market wants and by making a profit, they rely on local labour and are resilient. They provide good quality jobs with wages significantly higher than the Scottish average in the communities where they operate.
- There could be a good opportunity for a blue economy cluster to support innovation, collaboration and growth.

- **Jonathan Sayer-Mitchell (JSM), Director and Project Manager, Tritonia Scientific Ltd**

The key points from JSM's presentation included:

- Tritonia has developed a technology called georeferenced 3D photogrammetry, a method that links image capture with precise mapping to produce accurate 3D records of underwater features and environments.
- This will help people to make understandable, undisputable and sustainable decisions about the seabed.
- 3D photogrammetry can support sustainable growth and implementation of higher standards of environmental regulation.
- Changes in regulation will depend on strengthening the evidence base of environmental impacts or lack of environmental impacts and being able to prove those not just to other scientists but to policy makers or the public.
- What's happening underwater is a question that everyone in the in the marine sphere is interested in answering whether it be scientists or salmon producers or shellfish farmers, seaweed farmers.
- The problem is, the seabeds are difficult to monitor, there's a lack of clarity and the impacts or the extent of impacts are difficult to quantify.
- This technology aims to give an extra layer of clarity and to quantify changes where that wasn't possible in the past.
- In the oil and gas industry there's a huge amount of capital to fund projects and technology, which isn't often the case with fisheries and fish farms so a low-cost solution has been developed.
- JSM provided some practical application of the technology:
 - The Scottish Government Marine Directorate is using technology to help better assess and identify projects and opportunities that will improve and increase investment in Scotland's marine natural capital.
 - Scottish Environment Protection Agency (SEPA) is currently progressing a new standard on visual survey techniques and new guidance for baseline surveys (aquaculture). In both, SEPA states that 3D photogrammetry is acceptable and provides a highly valued addition to underwater video.
 - In Salmon farming it is being used to demonstrate compliance, evidence where there is no impact, evidence seabed recovery, and movement or expansion to new environments supporting sustainable growth.

This was followed by an open debate where the following key points were noted:

- Baukje de Roos highlighted that the Rowett Institute at the University of Aberdeen has carried out research looking at everything we produce, import, export and what we purchase and consume.
- From this research it was thought that we are not eating enough seafood, although we produce a lot of it in Scotland which is nutritious and produced in a very sustainable way.
- While exporting valuable fish we are exporting valuable nutrients out of the country. These nutrients could contribute to half of what we need as a

population in the UK. It was wondered how can we convince consumers to eat more fish. It was though that there should be more collaboration between academia and the different sectors to move this forward.

- Jules Griffin noted that recent research has shown that dementia is linked to a lack of polyunsaturated fats in the diet, as well as high cholesterol diets which we know fish and seafood are known to be lowering.
- Pete Ritchie asked if the Tritonia technology could sample water quality as well as taking photographs. JSM said that Tritonia doesn't currently have a system which would take physical water samples.
- Simon Macdonald (SM) noted that there has been issues in the past with licences being granted to wind farms in areas that would destroy haddock spawning grounds in the North Sea. He felt more joined up discussions was needed between the fishermen, the fishing industry, the people who are applying for licences for the wind farms and with Crown Estates Scotland. He asked if there had been further progress with these discussions.
- HF noted that there's been a lot more discussion about the need to have joined up thinking but that there's not been much progress. She felt by the time codes of best practise are in place it could be too late for the fishing sector. She noted that reaching net zero is important and that renewable energy will play a part in that but it can't come at the cost of low carbon healthy food.
- Ann Packard wondered whether there are subsequent problems relative to future decommissioning of windmills which might further erode and provide environmental issues.
- SM noted that the amount of energy it takes to make a turbine is actually significantly more than it will produce in its 15 approximate years of its lifespan. He said there's been more discussion on putting more windmills on the ground rather than decommissioning old equipment.
- JSM said that in Africa there's a lot of work looking at the benefits of closing off these areas to fisheries and leaving some of the structures in the water as potential fish aggregations and nursery ground.

6. AOB

No other business was noted.

7. Dates of the next meeting

The meeting dates have been set for 2025, these are as follows:

- 26 February 2025, 6pm
- 14 May 2025, 6pm
- 10 September 2025 (AGM), 6pm