

North East Scotland Fisheries Development Partnership
21-02-2020

Future Proofing the Seafood

Industry in North-East Scotland

February 2020

Future Proofing the Seafood Industry in North-East Scotland

1. Current Number of North-East Scotland Processors

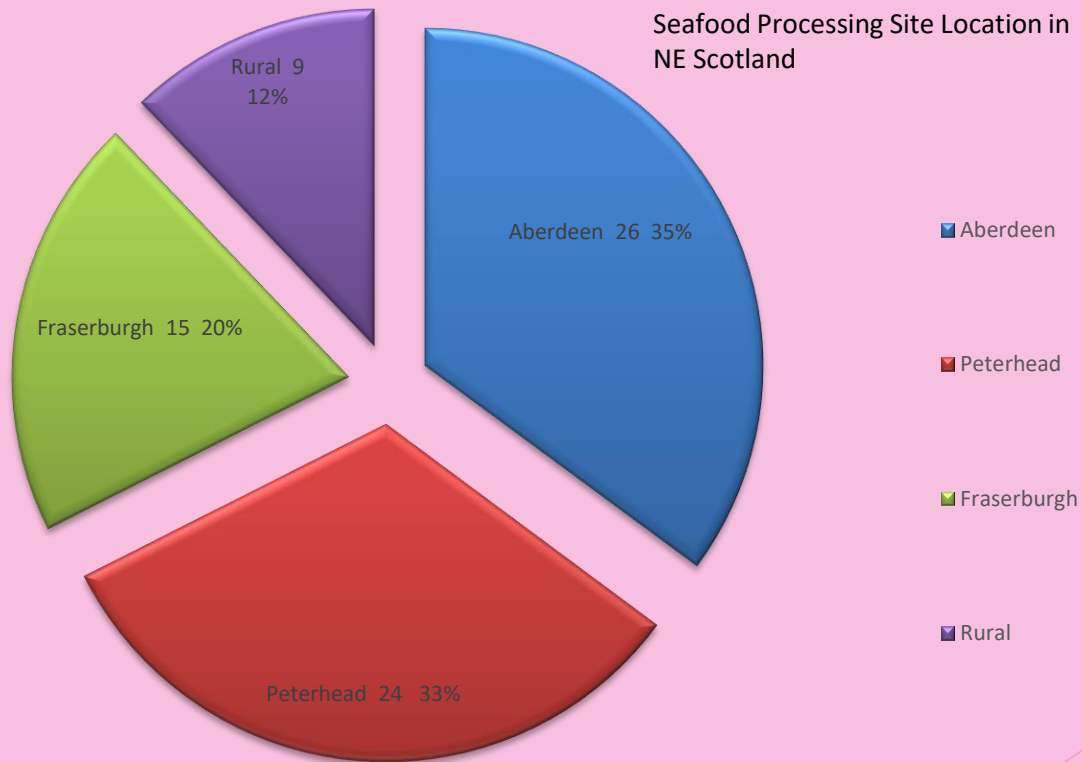
- Total seafood sites - 74
- Total seafood businesses - 71
- Total businesses interviewed to date - 61 (86%)

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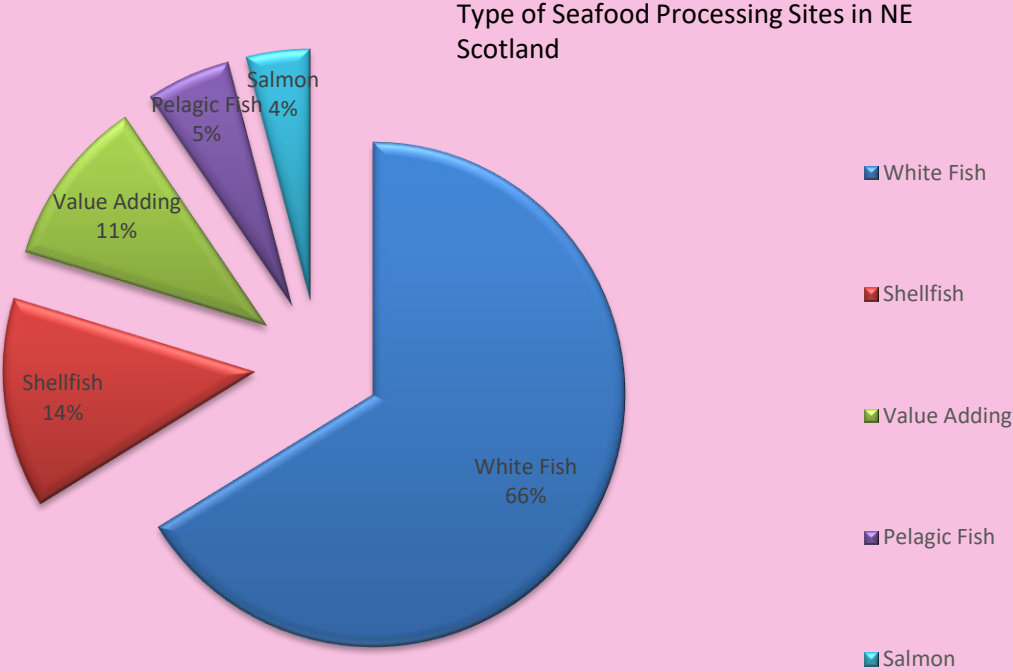
2. Seafood Processing Sites in North-East Scotland

	Total	White Fish	Pelagic	Shellfish	Value Added	Salmon
Aberdeen	26	20		1	4	1
Fraserburgh	15	11		2	2	
Peterhead	24	13	4	4	2	1
Other	9	5		3		1
	74	49	4	10	8	3

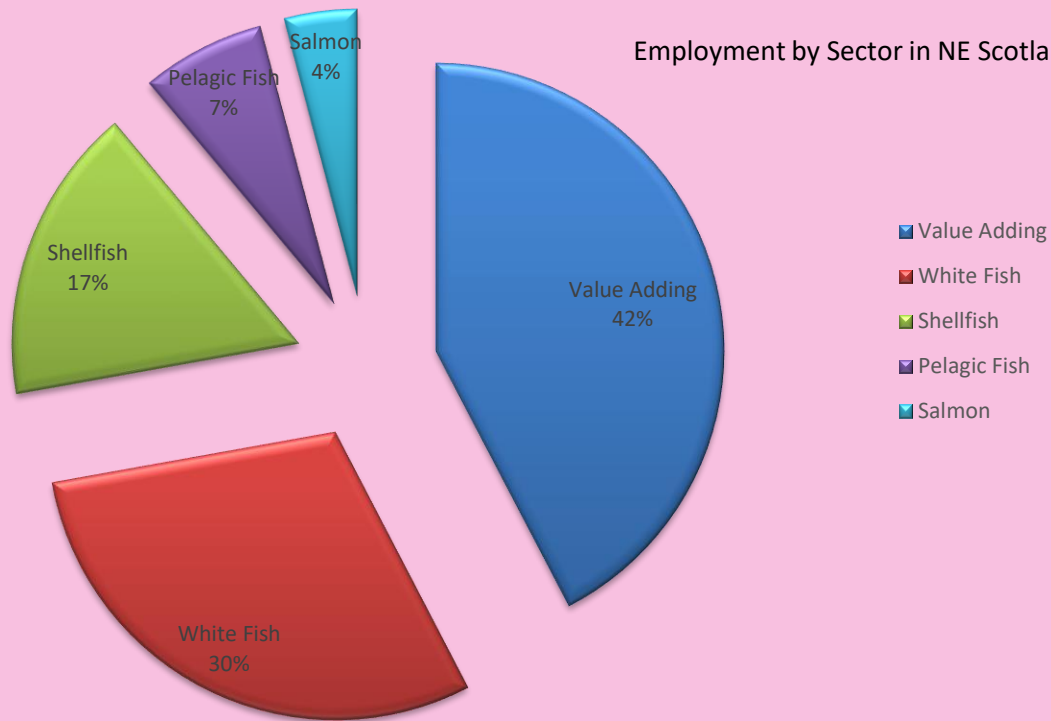
Seafood Processing Site Locations in NE Scotland



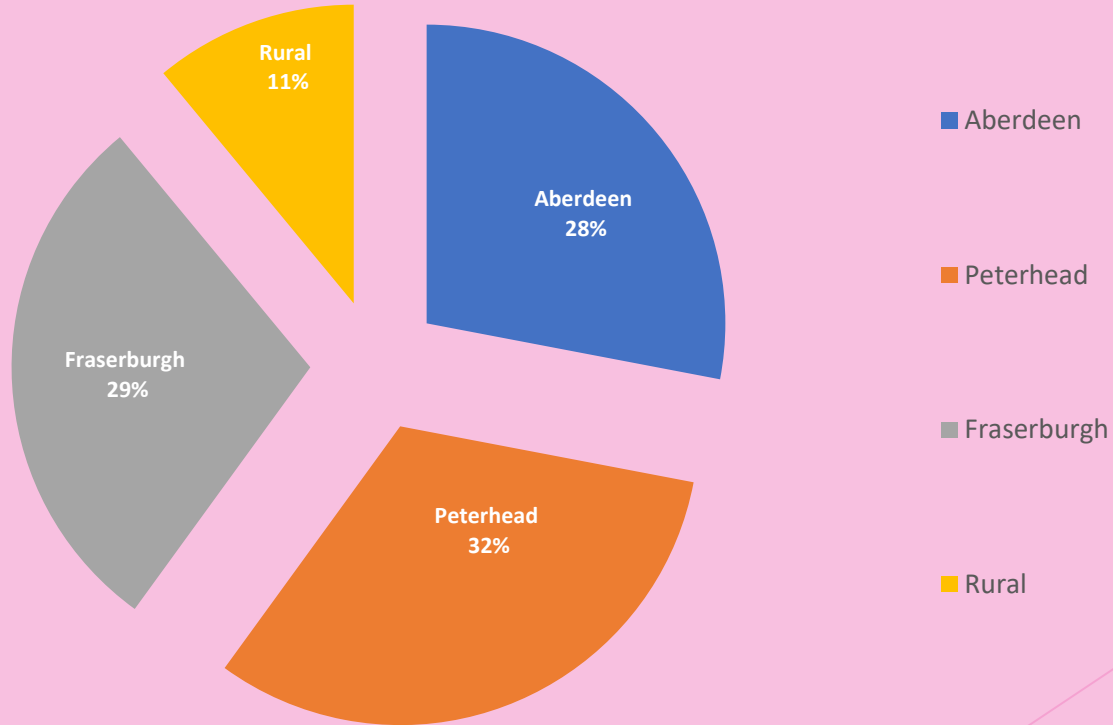
Type of Seafood Processing Sites in NE Scotland



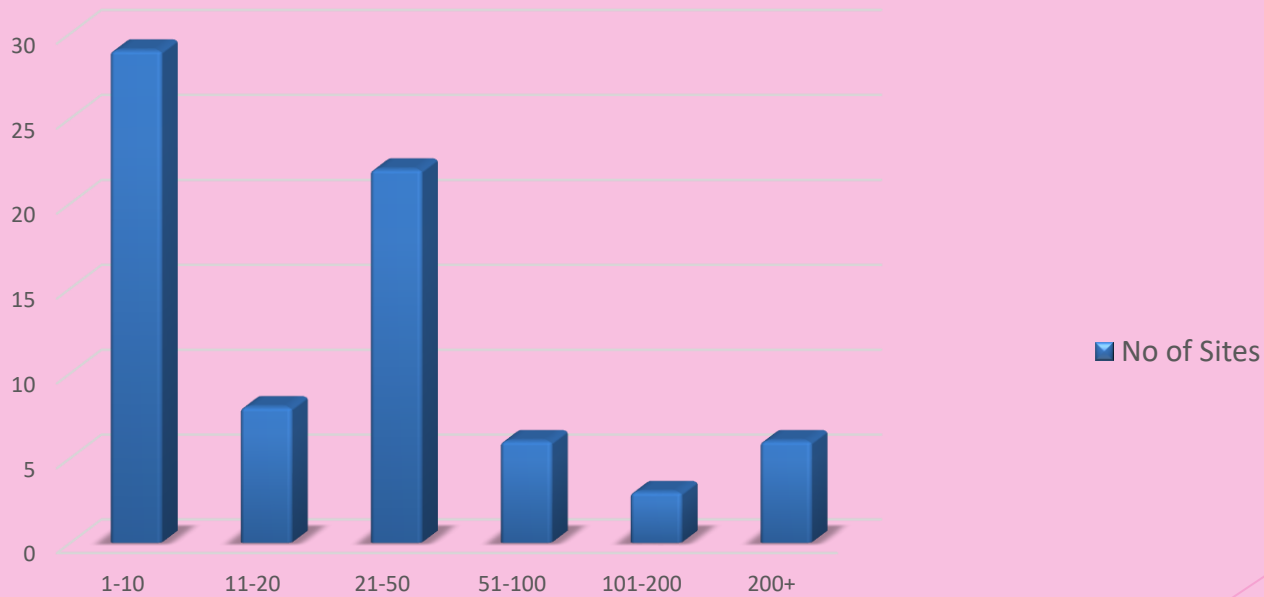
Employment by Sector in NE Scotland



Employment by Location



Employee Numbers Per Site



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3. Desk Research/Review of Existing Strategies

- Governing UK Fisheries after Brexit - Lessons from Iceland, Norway and the Faroe Islands – 2019.
- A Green Future: Our 25 Year Plan to Improve the Environment - 2018.
- Future of Fisheries Management in Scotland : National Discussion Paper - Published 2019.
- Seafood Processing Industry Report - 2016.
- North East Scotland Fisheries Development Partnership.
- Presentation - February 2018 - Scottish Seafood Association.
- Ambition 2030 : A growth strategy for farming, fishing, food and drink.
- Changing Tides.
- Seafish meeting.

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4. Financial Capability Assessment/Mapping

- Most recent three years financial information (Companies House/Interview/BDA knowledge).
- Confirmed / amended after interviews.
- Three year trends.
- Assessed by whole industry, sector (e.g. white/ pelagic/ shellfish), location (Aberdeen / Peterhead / Fraserburgh).
- Owners age profile / succession.
- Ability to fund expansion - gearing.
- Mapping Matrix.
- 53 Businesses in NE Scotland so far.

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5. Detailed Practical Research (Questionnaire)

5.1 Current Capacity

- Premises (size/nature)
- Production (source/throughput/products/markets)
- Employees. (full-time/part-time/local/non-local)
- Management (type/succession/management plan/motivation)

5.2 Forecasts

- Supplies
- Sales
- Profits
- Employees

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5.3 Performance Issues

- Supplies (volume/regularity)
- Staff (availability/recruitment/retention/training)
- Overheads (energy/repairs/maintenance)
- Compliance (environmental health/licences)
- Customer Price Resistance
- Finance (cash flow/bank funding/business rates)

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6. Development Plans

- Development Plan in place
- Raw Material/Market Plan in place
- Succession Plan
- Technology

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7. Swot Analysis

- Business
- Sector

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8. Next Steps

- Complete interviews with processors.
- Consultations with vessel owners, agents, logistics and Harbour Authorities.
- Strategic Analysis.
- Strategic analysis of the seafood industry value chain.
- Strategic Plan.
- Action Plan.
- Scope of Study - North East? / Wider?