

Report to Partnership Meeting 16 November 2018

RESEARCH AND STRATEGY DELIVERY

Fish'n'Trips

Purpose of Report

To update Members on the research that HITRANS has been asked to undertake by Transport Scotland and Scotland Food and Drink.

Aquaculture Growth to 2030 - A Strategic Plan for farming Scotland's seas.

In 2016, a Working Group of leading aquaculture businesses and organisations came together to create a growth strategy for aquaculture in Scotland to 2030. The aim was to deliver an ambitious, industry-led plan for sustainable growth across the entire aquaculture value chain. Aquaculture in Scotland is diverse, from the farming of salmon and other finfish species, to the production of mussels and oysters, to the harvesting of seaweed. It contributes over £1.8bn annually to Scotland's economy and sustains the economic and social fabric of the Highlands and Islands in particular. But the potential contribution of farming Scotland's seas is far greater. Research points to a potential annual contribution of £3.6bn or more by 2030. The number of jobs supported by the sector could reach 18,000.

Strategic Priorities for the Sector

For Scotland to deliver high levels of sustainable growth by 2030 and beyond, the Working Group identified six strategic priority areas for effective collaboration between regulators, industry, researchers and other stakeholders. These are:

- industry leadership and ambition
- enabling and proportionate regulation
- accelerating innovation
- skills development
- finance
- infrastructure.

In addressing these, aquaculture policy and regulation should give equal weight to the three pillars of sustainable growth: economic development, social development and environmental protection.

Key Recommendations

Within these six areas of strategic focus, the Working Group recommended 20 specific actions. In particular, the Working Group believe three actions are critical to the

sustainable growth of aquaculture in Scotland:

- the formation of an Industry Leadership Group (ILG) to drive sector growth and ensure alignment between industry and government
- an examination of the role of Marine Scotland as both regulator and policy advocate for development. There is an opportunity to align with other food and drink sectors in Scotland by moving the development role into the Scottish Government's Food, Drink & Rural Communities Division
- the introduction of Innovation Sites, to allow controlled trials and development of innovative equipment, technologies, disease control measures, and regulation.

In 2030, Scotland has the opportunity to be a world-leading player in an industry that is vital for future food security and has one of the lowest carbon footprints of any major form of animal protein production.

The delivery of these 20 recommendations should permit the sector to grasp that opportunity and reap long-term social and economic benefits for Scotland.

Recommendation 19: Essential investment in infrastructure

We recommend a sectoral mapping exercise to determine aquaculture's current transport and logistical constraints and future requirements to 2030, in terms of roads, ports, harbours and ferry services, along similar lines to HITRANS's Whisky Logistics Study (2011). This should be used to inform future investment plans in infrastructure improvement in Scotland.

We also recommend the industry feed into Transport Scotland's Strategic Transport Projects Review over the next 12–24 months.

Responsible: HITRANS, with input from ILG when formed

Timeframe: By November 2017 and then ongoing

HITRANS' role

HITRANS embarked on an exercise to understand the sector by meeting key players and by harvesting the available literature. We engaged consultants as per the Whisky Logistics Study to document its particular logistics requirements and to identify where forecast growth may impact on infrastructure.

The completed draft report is attached, and will inform NTS policy development in spring 2018, and the draft NTS in 2019, with STPR2 appearing in 2021, and will be aligned with NPF4.

RISK REGISTER

RTS Delivery

Impact - Positive

Policy

Impact - Positive

Financial

Impact – Co-funded by HITRANS and HIE

Equality

Impact – Neutral

Recommendations

1. Members and Advisors are asked to approve the report.

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| Report by: | Frank Roach |
| Designation: | Partnership Manager |
| Date: | 6 th November 2018 |