

# Making Waves



An overview of key projects  
in the year to end March 2025



# Chairman's Statement



In 2024, Seafood Scotland celebrated a significant milestone, its 25<sup>th</sup> anniversary. While the team was as busy as ever promoting Scottish seafood at home and in key markets abroad, we also took the opportunity to reflect on what we have achieved over these past 25 years. We were proud to host our industry partners, MSPs, MPs and other distinguished guests at

celebratory events in both the Scottish & UK Parliaments. It was also heartening to see so many of the people that have over the years helped shape the direction of the company in attendance, none more so than one of the founding members and long serving chair Iain MacSween.

I am proud of the fact that Seafood Scotland's reputation continues to grow year on year and being chosen as a partner to host the Global Seafood Alliance's Responsible Seafood Summit, held in St Andrews in October, highlights just how much the company's reputation has grown on the global stage. At home we remain a trusted sounding board for everyone in the industry, both at sea and on land, with advice and support continuing to be offered to all sectors of the industry. People have no hesitation in contacting us if they have an issue or an idea they want to pursue, which highlights the level of expertise that we have built up within the team.

Fish and shellfish sourced from and produced in Scottish waters stays highly regarded at home and abroad and is increasingly sought after. It's a high quality, low carbon source of protein at a time when food security is becoming increasingly important to our economy. To have such bounty on our doorstep is a huge benefit for Scotland and we are committed to ensuring that we enable those whose hard work catching, producing and processing this bounty can maximise the benefits of this valuable resource in a profitable and sustainable manner for years to come.

Seafood Scotland relies on several key partners to help us do our job, but once again special thanks must go the Scottish Government Marine Directorate and Scotland Food and Drink for their continued support during the year.

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**Kevin McDonnell,**  
Chair of Seafood Scotland

# CEO's Statement

2024 saw Seafood Scotland co-host the internationally recognised Responsible Seafood Summit, the first time this prestigious annual gathering of global seafood leaders has been held in the UK.



Scotland punches well above its weight in terms of its willingness to modernise and seek out best practice across the sector. This is due in no small part to everyone working in the industry. We are recognised on a global stage because of our collective passion and commitment.

2025 is set to be a landmark year, too. The biggest opportunity on the horizon is our plan to launch a Scottish Ocean Cluster, to be delivered by a steering group which includes Aberdeenshire Council, innovation centre IBioC, Opportunity North East and Zero Waste Scotland. Together we will ensure that Scotland is in a vanguard of countries with the ambition, knowledge and commitment to foster prosperity for the industry for decades to come.

With the unwavering support of our board, my team has gone above and beyond to drive success in our industry. Over the past year, they have expanded into new markets, created valuable business opportunities, and provided extensive support to Scotland's seafood industry - ranging from talent attraction to helping businesses navigate regulatory challenges.

As a small team with a broad remit, we rely heavily on strong partnerships to deliver on our ambitions. We're sincerely grateful for the continued support of key collaborators such as Scotland Food & Drink, Scottish Enterprise, and the Department for Business and Trade. The progress we make for the Scottish seafood industry is only possible through close cooperation with these and other valued partners. I'd also like to echo our Chairman's thanks to the Marine Directorate of the Scottish Government for their ongoing support - both for Seafood Scotland and the wider sector - as well as for our continued funding arrangement.

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**Donna Fordyce,**  
CEO of Seafood Scotland





# A Message from the Cabinet Secretary

**Scotland's food and drink industry is one of the crown jewels of our economy and seafood is a major part of this success story. The sector is particularly vital for many of our coastal and island communities.**



As Scotland's national seafood trade and marketing body, Seafood Scotland plays a pivotal part in this portrait of success. The funding investment they received from Scottish Government is a signal of the importance we place in their role delivering for industry.

I was delighted, after much hard work last year, that they successfully co-hosted the Responsible Seafood Summit which brought together 350 delegates from around the world in this prestigious international event. This builds on their wider international work to elevate the profile of premium Scottish seafood products

Closer to home, their domestic activity has also been crucial in encouraging both visibility of the sector as a career and seafood as a sustainable food source. The Seafood in Schools programme in particular has been a welcome bridge in seafood education, helping young people become more aware of the diversity of Scottish seafood, the nutritious and cost-effective meals that can be made from it, and the significant role seafood plays in Scotland's economy.

I was pleased last year to be able to join the Parliamentary reception in celebration of their 25<sup>th</sup> anniversary and to recognise all that they have achieved. I look forward to continuing to work with Donna and the team to drive forward their ambitious plans for an innovative and sustainable seafood sector.

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***Mairi Gurgeon,***

Cabinet Secretary for Rural Affairs, Land Reform and Islands

2024-25 was a year of global connections, worldwide trade shows, expanding markets and inspiring the next generation of seafood professionals. One could almost say the – Michelin – stars aligned!

From co-hosting the Responsible Seafood Summit to fostering vital partnerships and sharing knowledge across the industry, it was a year defined by collaboration and innovation.

We're excited to share some of the key highlights that made these 12 months so memorable for Scottish seafood.



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# Scottish seafood in numbers

SCOTTISH VESSELS LANDED

**501** thousand tonnes of **SEAFOOD**

WITH A GROSS VALUE OF

**£652m** in 2023



A RECORD

**£844m**

of salmon was  
exported in

**2024**

There are

**2,006**

active Scottish-based vessels

**51%** of the entire UK  
fishing fleet

A record-breaking

**10,311** tonnes  
of **Scottish mussels**

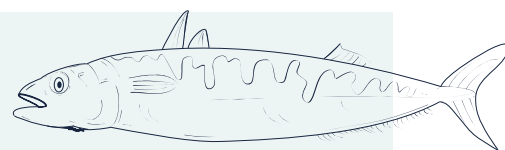
were farmed in 2023 – equivalent  
to around **350m** molluscs



Some

**25,000**  
people

are employed within the  
Scottish seafood industry.



**mackerel**

remained the most valuable  
species in 2023 worth

**£248m**

## Navigating Challenges

We use feedback from producers and suppliers to strengthen our understanding of the challenges they face, the ensure our initiatives are directly linked to providing the support they need. Some of these recent initiatives are:

- Supporting business development within the langoustine sector, particularly overseas where this premium species is in much demand. This project will culminate in 2025 with the launch of a Scottish Quality Scheme.
- Joining the vanguard of countries driving further innovation and economic growth by researching how best to extract more value from fish byproducts.

- Raising awareness among young people of the seafood sector as an exciting career choice through our Seafood in School initiative, combatting the challenges caused by Brexit and a shrinking workforce.

And, while our key focus remains trade marketing at home and abroad, we are also dedicated to encouraging deeper understanding, rebutting misinformation and misunderstandings, while encouraging consumers to eat more Scottish seafood and to be aware of its nutritious qualities and premium taste.

# History of Success

For over 25 years we have worked to improve the performance and reputation of Scotland's seafood sector. This multibillion-pound industry is vital for our nation's economy, but also a key part of our cultural identity. Its success leads to economic, social and environmental benefits for stakeholders and rural communities.



## Building Business Confidence

While we often engage with many organisations at trade shows, we also provide tailored support and counsel for individual organisations. This includes smoothing the path behind the scenes, providing a guiding hand or expert advice, or sharing vital insight into a particular market or species.

Set piece events are the most visible part of what we do. Given this, it's vital that the promotion of Scottish seafood must be sufficiently funded and adaptable to respond to market forces at home and in key markets across the globe. We have identified six focus areas where we believe we can make the biggest positive impact on behalf of the sector.

### TRADE DEVELOPMENT

Expanding into new markets while sustaining and further developing existing opportunities - driven by market dynamics, industry trends, and a focus on premiumisation.

### INDUSTRY AWARENESS

Highlighting stories throughout the supply chain where provenance, quality and responsible practices take centre stage.

### INVESTMENT AND INNOVATION

Supporting the industry to embrace and invest in innovations that drive productivity and profitability, such as automation.

### PEOPLE AND SKILLS

Building the reputation of the sector as an attractive and accessible option for people at all levels of experience.

### SUSTAINABILITY

Unlocking value and reducing waste by promoting sustainable fishing methods, creating new 'sidestreams' and learning from other countries such as Iceland.

### COMMUNITIES

Championing coastal and rural communities for their vital contribution and raising awareness of the health benefits of eating seafood to support the industry at large.





# 25<sup>th</sup> Anniversary

## A Silver celebration for Seafood Scotland

In 2024/25, Seafood Scotland proudly marked its 25<sup>th</sup> anniversary, celebrating a quarter-century of championing the people, produce, and passion that define the Scottish seafood industry. To commemorate this milestone, we hosted two landmark events that recognised our achievements, and looked ahead to the future.

The first of these was a reception at the Scottish Parliament, kindly sponsored by Karen Adam MSP. Cabinet Secretary for Rural Affairs, Land Reform and Islands, Mairi Gougeon, gave an address expressing the Scottish Government's continued support for the industry. Her words underscored the importance of seafood to Scotland's economy, culture, and global reputation for premium food and drink. Industry to an audience of fishers, farmers, producers, retailers, chefs, and policymakers from across the UK.



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Seafood Scotland's event in the Scottish Parliament was another example of the great work we are doing to promote fisheries."

Karen Adam,  
MSP

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It's heartening to see Seafood Scotland go from strength to strength and retain its position as a much-loved and needed organisation, true to its grass roots. I don't think people can believe how small the team is, given what is delivered, but in some ways, it is a strength as it makes it nimbler. It seems to attract many like-minded people who share the vision."

Libby Woodhatch,  
Executive Chair, MarinTrust





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With their ambition, hard work and relentless passion for the sector, Seafood Scotland plays a fundamental role supporting one of Scotland's best loved exports. Their involvement in the launch of Brand Scotland in Singapore, and commitment to gastrodiploamacy as a means of promoting Scotland across the globe is highly valued by the UK Government. I was delighted to speak at their recent Westminster reception and was grateful for their support during my recent trip to the United States. I look forward to working closely with Donna and the team over the coming months."

**The Rt Hon Ian Murray MP,  
Secretary of State for Scotland**

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I was delighted to be invited and attend your wonderful Westminster reception. It was so appreciated to engage with Parliamentarians and others to discuss our important industry, not only the fantastic opportunities for our products worldwide, but also the challenges ahead, such discussions are invaluable for all parties."

**David Jarrad, CEO of The Shellfish Association of Great Britain**

**The second celebration was a reception in the Houses of Parliament, hosted by Torcuil Chrichton MP. We brought together MPs from all major parties, demonstrating strong cross-party support for Scotland's seafood sector.**

We were honoured to hear from Ian Murray, Secretary of State for Scotland, who reaffirmed his steadfast support, and Daniel Zeichner, Minister of State for Fisheries, who spoke of his admiration for the dedication of those working across the industry.

Representatives from every corner of the sector from wild-capture fishers to aquaculture farmers and seafood processors attended, highlighting the strength and unity of our industry.

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It was wonderful to attend Seafood Scotland's celebration and to recognise the huge impact they have had on Scottish businesses. Their hard work and dedication means that Scottish fish and shellfish has a global reputation for being high quality and sustainable."

**Hannah Fennell,  
Head of Orkney Fisheries Association**







# Market Development: UK

“

The support provided by Seafood Scotland has been transformational for my small Argyll oyster farm. Adam has truly excelled at giving my young company a boost and promoting our product to the most discerning Chefs in the UK. Adam provided crucial and well-timed advice on the branding of our product, brought 3-Michelin star chefs to our farm, and managed to get our oysters served at several prestigious events. The support has directly led to a full order book of top-end clients. We are extremely proud of our product, but Seafood Scotland's support has been vital in getting the exposure we need to get off to a flying start”

Tom Ashton, Native Aqua Ltd.

## Chef & Restaurant Magazine

Our longstanding partnership with the UK's leading publication for chefs and restaurateurs keeps value at the heart of everything we do. We focus on helping chefs enhance their service, drive innovation, embrace sustainability, and ultimately boost profitability.

We've developed a range of tools, including species guides featuring flavour profiles, pairings, and seasonality insights. Additionally, our 'Inspiration Station' curates content from chefs, fostering collaboration and knowledge sharing.

By focussing on chef-led content – quotes, images, and interviews – we ensure Scottish seafood is seen as a premium product, the first choice for top chefs. We also promote and celebrate activities which are important to chefs, such as the Michelin Guide awards ceremony, cementing the Seafood Scotland team as a valuable source of support and information.





“

We had an incredible trip visiting some of the best fishermen and witnessing the effort and passion they put into their work. We explored amazing places and saw firsthand how challenging it can be – you never know what you’ll have at the end of the day, sometimes the cages are empty! This experience gave us a deeper understanding of the food chain, from sea to plate.”

Marco Zampese



## Inward Mission: Hélène Darroze at The Connaught

Inward visits play a key role in showcasing the wonderful species and talented people across the supply chain from fishers, catchers and farmers to processors and local restaurants.

In August 2024, Adam Wing hosted chefs from three Michelin starred Hélène Darroze at The Connaught, London, led by executive chef Marco Zampese, on a hands-on tour of the west coast of Scotland. From Oban to Mull and Port Appin, the group experienced the sea-to-plate journey firsthand.

A highlight was a visit to Kames Fish Farming, Scotland’s only steelhead trout farm, and trips to Lochnell Oysters and Native Aqua, a company working to reintroduce native oysters to commercial viability.

The visitors also helped langoustine fisher David Isaac unload his creels and chatted with Young Fisherman of the Year 2024 Lee Gallagher about his expertise in catching lobster, brown and velvet crab, and langoustine.

And of course, the group sampled some of Scotland’s finest seafood, including a stop at Oban Pier’s renowned green seafood shack.

The team experienced the full spectrum of Scottish weather – every season in a single day! However, the opportunity to deepen their knowledge and better understand the products arriving at their acclaimed restaurant each day ensured they left with a newfound appreciation.

## Bocuse d'Or UK

We once again supported Team UK at the prestigious biennial Bocuse d'Or and were thrilled to see them place fifth in the World Final against 23 national teams.

Led by Tom Phillips (Restaurant Story, London), commis Harry van Lierop (The Ledbury), and coach Ian Musgrave (The Ritz), the team had five and a half hours to present two elaborate platters – a first for the competition.

As Adam Wing said: “To place in the top five against incredible competition highlights the commitment and consistency of Bocuse d'Or UK. The road to 2027 begins now, and Seafood Scotland remains committed to the UK team.”

Participating in activities such as this – and engaging with high-level chefs – opens doors for Scottish seafood both at home and abroad. By aligning ourselves with such an esteemed team of chefs, we are showing that Scottish seafood is recognised as a premium product with a place on the global stage.

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Scottish seafood is the best in the world, undoubtedly. The demand speaks to its exceptional quality. Every restaurant I know that was represented at the Bocuse d'Or features Scottish produce throughout their menus, and it's something we prize at Story.

“I remember working in America, seeing Scottish lobsters on menus, and wondering why - they had Maine lobster right there. But they prized Scottish lobster over their own. I think that just shows you how highly regarded Scottish seafood is by the international cheffing community.”

Chef Tom Phillips, Restaurant Story





# Michelin

## Michelin Guide Awards 2025

In February 2025, the Michelin Guide held its Great Britain and Ireland ceremony in Scotland for the first time, with Seafood Scotland as an official partner. Our goal for this partnership was to inspire chefs and restaurateurs to expand the use of Scotland's world-class seafood on their menus, further elevating its status in the global gastronomic landscape.

We undertook desk-based research which revealed that 80% of UK Michelin-starred restaurants use Scottish seafood on their menus, and every three-star restaurant utilises at least one species in their dishes.

The team embarked on a compelling media campaign to engage with this influential chef audience, and to drive home messaging around the quality and provenance of Scottish seafood. An opinion piece in The Herald, and a spread in the Glasgow Times (see next page) celebrated Scottish seafood in an appealing way.

We focus on high-end culinary collaborations because they allow us to strategically influence the mass market. By working with top chefs - who have strong media and social media presence and are key opinion leaders within the chef community - we can reach and engage a wider audience without the need for costly mass-market campaigns.



MICHELIN  
2025

GREAT BRITAIN  
& IRELAND

SEAFOOD  
SCOTLAND

IN PARTNERSHIP WITH





## City of Glasgow College workshop

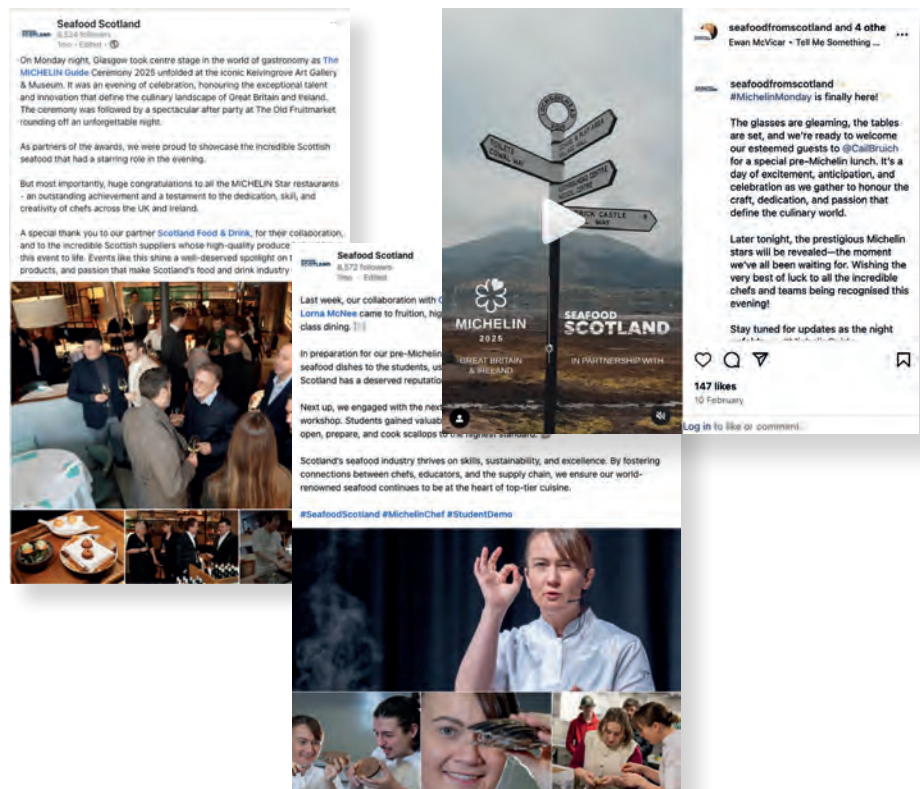
We teamed up with Glasgow-based chef Lorna McNee for a demonstration and hands-on scallop workshop at City of Glasgow College to showcase why scallops are the most favoured Scottish seafood species in Michelin-starred restaurants throughout the UK.

Lorna recreated a dish she would be serving to some of the UK's top chefs the day of the awards ceremony, then gave a handful of students an exclusive lesson on how to open, prepare and cook scallops.

With ever-shrinking budgets, it's not often students get the opportunity to get hands on and learn about the world-class products right on their doorstep. Partnering with the college allowed us to connect with the next generation of chefs to highlight the fact that Michelin had chosen to host the prestigious awards in their city - and opening the door to each of them to be part of the celebration.

## Michelin Mondays

To build anticipation for the ceremony on our social channels, we created #MichelinMondays to highlight the vital role Scottish seafood plays in some of the finest restaurants in the UK and beyond. Engagement with #MichelinMondays was strong generating the highest number of likes, comments and direct messages so far this year.



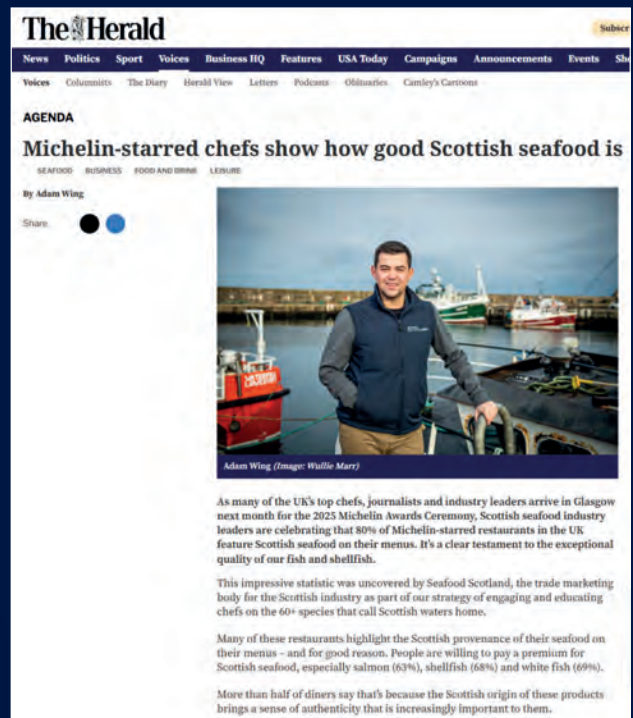
## Seafood Scotland lunch

On the day of the awards, 27 chefs from top UK restaurants joined us for a private lunch at Michelin-starred Cail Bruich prepared by Chef Director Lorna McNee. Attendees included Jean Phillipe-Blondet (3\* Alain Ducasse at The Dorchester), James 'Jocky' Petrie (3\* The Fat Duck), Raymond Blanc (2\* La Manoir au Quat'Saisons) and John Williams (2\* The Ritz).

The menu featured Scottish seafood at its heart in the lead up to the ceremony, reminding chefs of our valuable position within the industry - in particular connecting restaurants with suppliers to help them put premium quality seafood on their menus.



## Media coverage





# Market Development: US

## Seafood Expo North America (SENA)

Seafood Expo North America in Boston is a key event in the seafood calendar, and our team was honoured to represent the Scottish seafood sector on a global stage. Seventeen Scottish companies made the trip, showcasing all corners of our industry from salmon producers to whitefish, shellfish and added-value products.

Our stand served as a vibrant hub for business, networking, and discussions, complemented by a dedicated tasting area where a professional chef brought Scottish seafood to life through live demonstrations. Our companies engaged with an average of 100 new connections, 50 of those being potential new customers. They also met with current customers and were able to strengthen and improve existing relationships.

A highlight was hosting a well-attended networking event, where Donna Fordyce shared insights on post-Covid trade activities and market opportunities.



“

I am writing this at the end of our first, and we trust a highly successful, show at SENA in Boston. It would be fair to say that we would never have been there without the help and guidance of Seafood Scotland. The quality of the stand, the professionalism of the team, and the support they give is invaluable. We are very thankful to Seafood Scotland for the work they do in promoting the Scottish seafood Industry.”

Paul Thomson, J K Thomson





## StarChefs

Encouraging chefs to use Scottish seafood has never been more important. To advance these efforts we partnered with StarChefs in the US, providing Scottish salmon as a premium ingredient for chefs to use in its Rising Star Awards seafood showdown competition. More than 500 chefs from all over the country entered. The winner will receive an all-expenses-paid trip to Scotland including a behind-the-scenes look at the food and drink industry here.

We also supported events in Chicago, New York, Charleston, Savannah, Miami and Cleveland showcasing our Scottish Seafood to thousands of consumers in the US.

We also supported events in Chicago, Charleston and Savannah, offering talented StarChefs alumni the opportunity to cook with our wonderful Scottish salmon and influencing industry trends through StarChefs' trendsetting participants.

This partnership puts us in the centre of key US culinary markets, connecting Scottish seafood with influential chefs and restaurateurs across major cities. It gives the chef who shape high-end menus direct exposure of Scotland's premium seafood, driving demand and fostering long-term supplier relationships. These chefs are increasingly seeking quality ingredients with compelling stories – making Scottish seafood the perfect choice.

The collaboration has also strengthened our relationships with key buyers and enhanced brand recognition in the competitive US market. By engaging directly with decision-makers we have found new sales opportunities while also gaining insights into the country's culinary trends.



## Global Seafood Market Conference

In January 2025, we attended the Global Seafood Market Conference (GSMC) in Palm Springs, hosted annually by the National Fisheries Institute.

The conference provided valuable market insights around economic forecasts and trends, helping us identify opportunities for Scottish seafood in the US. It also deepened our understanding of macroeconomic factors affecting seafood pricing, demand, and logistics, which will inform future strategies.

Attending GSMC strengthens our relationships with key US buyers, distributors, and professionals across food service and retail. Indeed, several conversations led to further discussions at Seafood Expo North America (SENA) which will be crucial in converting interest into sales. Furthermore, our

collaboration with US market specialist Zack Ahrens from Scotland Development International has been invaluable in positioning Scottish seafood and setting up follow-up discussions.

We will continue capitalising on the interest generated at GSMC to create commercial opportunities and use the insights gained to refine our market positioning. This strategic approach sets the stage for expanding Scotland's seafood exports in 2025.



## Tartan Week

Attending Tartan Week provides Seafood Scotland with a valuable platform to promote Scottish seafood to an international audience, particularly in the North American market. It supports brand visibility, facilitates trade and networking opportunities, and aligns the sector with Scotland's wider cultural and culinary identity.

By engaging with importers, chefs, and media, the event helps position Scotland as a global leader in sustainable, premium seafood, while also generating market insights and valuable PR content. Key stakeholders and members of UK and US government attend, making Tartan Week a great opportunity for us to engage in conversations to support the Scottish seafood industry's strong relationship with the US.



# Market Development: Middle East

## Gulfood

We hosted four Scottish companies at our group stand at Gulfood, showcasing salmon, shellfish, whitefish, and value-added products. In collaboration with the SDI in-market team, we facilitated buyer introductions, provided market insights, and arranged site visits to support business growth. On-stand cooking demonstrations with SDI and Department for Business and Trade (DBT) brought the seafood to life, while off-stand events highlighted the exceptional range and quality of Scottish seafood. This was a valuable opportunity to reinforce Scotland's reputation for premium seafood in the global market.

“

Seafood Scotland and Adam Wing have played a pivotal role in promoting Scotland's world-class seafood on the global stage. Their efforts at the Dubai Gulfood 2025 have not only highlighted the unparalleled quality, sustainability, and rich heritage of Scottish seafood but have also fostered valuable international partnerships that we can build upon. This initiative continues to strengthen Scotland's reputation as a leading provider of premium seafood to markets around the world.”

Jimmy Buchan, Managing Director Amity Seafood



“

The programme has provided an invaluable platform to drive Scottish langoustines into new, high-value markets while ensuring sustainability remains at the heart of our industry.”

Matthew Hurst

## Langoustines

The Nephrops Programme has made significant strides in recovering and expanding markets for langoustines, strengthening Scotland's position as a leader in premium seafood. Our presence at SEG and SENA provided key platforms to showcase Scottish langoustines to international buyers.

These events led to high-value trade connections across EMEA and the USA. Learning journeys for fishermen and processors to major markets, including Dubai and Singapore, further developed industry knowledge and resulted in new sales, particularly in the Middle East.

Alongside the Scottish Manufacturing Advisory Service we created a value stream map, identifying 33 key steps to enhance supply chain efficiency. Ongoing research into waste valorisation explored innovative uses for langoustine heads and claws. And we're continuing our sustainability initiatives, with a focus on Net Zero targets and digitalisation pilots that track traceability and emissions using blockchain technology.

A final report will be published in 2025/26. We are also in the development stages to launch Scottish Quality Seafood, a quality assurance mark to be used on langoustine packaging before a wider rollout.

### Scottish Quality Langoustines Programme

A key milestone has been the development of the Scottish Quality Langoustines Programme, setting new industry standards for premium langoustines. This initiative includes seasonal quality reviews, competitor analysis, and enhanced packaging innovations. Training programmes and a new Scottish quality mark are in progress, further reinforcing the country's reputation for excellence in seafood.



# Responsible Seafood Summit

**A highlight of our year was co-hosting the 2024 Responsible Seafood Summit in St Andrews in October 2024 alongside the team at Global Seafood Alliance. More than 70 international expert-in-their-field speakers presented at the Summit.**

It was a huge commitment but, as a leading cold-water producing nation, we believe the Scottish seafood industry has more than proved itself on a global stage. We wanted renowned seafood leaders from around the world to see the passion, commitment and innovations happening in Scotland. It also afforded us an opportunity to expand our sustainability credentials and to attract further investment to safeguard the future of the industry for generations to come.

This was the first time the UK had been selected to host the event, and we were honoured to have Deputy First Minister of Scotland Kate Forbes extend a warm welcome to delegates and key retailers.



## The Responsible Seafood Summit – need to know

The Responsible Seafood Summit is an annual event organised by the US-based Global Seafood Alliance, bringing together global seafood professionals to explore sustainability, innovation, and industry challenges across the supply chain. From producers and processors to NGOs and policymakers, the Summit fosters collaboration and knowledge-sharing. The 2025 Summit will be held in Cartagena, Colombia, building on the conversations and connections made in Scotland.



## Producer spotlights

A key activity of the Summit was a series of curated field trips, designed to give delegates a deeper understanding of Scotland's seafood industry at the source. These visits brought guests face-to-face with producers who exemplify quality, sustainability, and innovation – one highlight being a visit to the rugged shores of Loch Fyne.

Guests enjoyed an immersive experience where they learned about Associated Seafood's commitment to quality and sustainability, showcasing the team's dedication to reducing impact to the environment while providing top-quality seafood.

A delicious seafood lunch followed, featuring the freshest local ingredients, expertly prepared to highlight the natural flavours of the nearby waters.

These immersive experiences offered international guests a memorable and authentic insight into the passion and pride that defines Scottish seafood.





## Summit reflections six months on

Hosting the Responsible Seafood Summit firmly established Scotland as a leading seafood nation on the global stage. It not only reinforced our confidence to think big but also secured our place in key industry discussions.

Through a mix of presentations, networking and field trips, the Summit created a powerful sense of connection. It reinforced our shared purpose and commitment to delivering the ultimate goal of making the global seafood industry more sustainable for future generations.

One of the most memorable topics of conversation at the Summit was on seafood 'side streams' such as heads, bones, skin and other secondary materials, which emphasised the income potential of seafood byproducts. For example, the Scotland-based company CuanTec has used shell byproducts to develop a powder for advanced wound care.

The team at Iceland Ocean Cluster noted that a single cod fish can be valued at \$4,750 when its oils, collagen and minerals are fully utilised and brought to market. This forward-thinking approach, backed by credible data, aligns perfectly with Seafood Scotland's vision for a sustainable seafood industry.

All of the valuable conversations at the summit have sparked momentum toward the creation of a Scottish Ocean Cluster, driving future collaboration and innovation in the sector (see page 32).





# Market Development: Europe

## France

### Vannes: an oyster learning journey

France leads Europe in oyster production, accounting for 88% of the total output, and the French are the largest consumers of oysters worldwide. The Scottish oyster sector is well aware of this, and keen to understand more about oyster production in France.

At the request of the industry, in October 2024 we brought a delegation of 6 Scottish oyster farmers and the head of aquaculture at Crown Estate Scotland to Southern Brittany, one of the leading regions for French oyster farming.

We visited several shellfish farms, engaging in conversations about challenges common to both markets. We also learned about the importance of labelling in France – the market is particularly responsive to designations of quality, geography, or traditional farming methods which are all celebrated as parts of cultural heritage.

The trip coincided with Les Rencontres Nationales de la conchyliculture, the national tradeshow for shellfish growers, which allowed the delegation to learn about best farming and marketing practices from suppliers based all over the country.

We also attended the annual regional seafood platter and oyster shucking competition – with Marie-Anne Omnes and Caledonian Oysters Company's Angus Vajk serving as judges. Delegates saw firsthand the creativity and presentation of seafood platters, a popular way to enjoy shellfish in France.

The trip was a valuable opportunity for knowledge acquisition. Our guests returned home armed with innovative ideas for their own shellfish farms and, crucially, a rejuvenated sense of confidence in their craft.



## Inward media visit

Working with our French agency Cap & Cime, we brought a group of media specialists to Scotland, all of whom were new to the Scottish seafood industry.

The trip showcased the entire supply chain. We saw the langoustine catch come in at Largs pier with Ian Wightman; learned about salmon farming and Label Rouge best practices from Bakkafrøst Scotland; and discovered loch oyster farming with Loch Fyne Oysters and Associated Seafoods. We visited MacNeil Shellfish to understand global exports and sourcing strategies and learned about demand and market trends from fishmonger Wilson's Catch of the Day.

Our guests saw firsthand just how carefully Scottish seafood is treated, from landing through to preparation for shipping to the continent. It was a true sea-to-plate journey that allowed them to further engage with our culture more generally and better understand the role the seafood sector plays in our country.







## St Andrew's week in Paris

### Scottish Christmas lunch at L'Inattendu

To promote new recipes developed by our ambassador, renowned chef Emilien Rouable, we held a Scottish Christmas lunch at his restaurant L'Inattendu in Villecresnes. Ten journalist and influencer guests sampled the finest Scottish mackerel, brown crab, and Label Rouge salmon, boosting product engagement ahead of the festive season. This activity helped reinforce the premium nature of Scottish seafood during the festive period, when celebrations are often focused on food. Hosting the media and influencers generated a buzz amongst both the trade and media for our world-class seafood in the French market.

### St Andrew's reception

The annual St Andrew's Day celebration at the British Ambassador's residence in Paris highlighted the versatility of Scottish seafood to over 350 industry professionals.

The night was planned as a franco-Scottish symphony, and we provided a selection of products for the embassy chefs and our culinary school partner, Ferrandi, who added a French Touch to the traditional Cullen Skink. Our ambassador chef Emilien Rouable showcased new recipes including brown crab and langoustines, favoured products on French market.

The reception was a highly valuable opportunity to engage with new buyers and strengthen existing relationships.



“

It was an honour to be a Scottish seafood ambassador this year and work with products of such exceptional quality. Every product I've had the privilege of highlighting bears witness to the exceptional care and attention paid to fishing and quality.”

Emilien Rouable, Chef of l'Inattendu

# Germany

## Fischwirtschafts-Gipfel

Germany is a priority region for us: it is a large market, but the number of active seafood importers is small, allowing us to develop strong relationships with all the key players. Notwithstanding the challenges of inflation and ongoing logistical issues, the German market remains stable, and demand for more species of white fish and shellfish is there.

The Fischwirtschafts-Gipfel conference in November is one of the largest fishing and aquaculture events in Germany and a unique occasion for us to meet most people involved in the sector. We partnered with Clearwater Seafoods' MacDuff Shellfish on a stand that showcased brown crab, langoustines and scallops. Through our partnership, MacDuff Shellfish entered the product competition and won best shellfish/crustacean product, which significantly increased interest in their shellfish and Scottish seafood in general.

At the event, we spoke with major importers from all over Germany and received enquiries about mackerel, whitefish and trout. We put them in touch with Scottish suppliers and exporters and commercial discussions are ongoing.



## Seafood masterclass

We collaborated with Scottish-Import, one of the largest Scottish seafood importers in Germany, to host a masterclass at Fischkochstudio, an award-winning fish cooking studio in Bremerhaven's fishing harbour.

In February, 20 importers, fishmongers and fish smokers attended our masterclass to learn about salmon, trout and monkfish. We shared cooking tips and recipes and discussed the flavours and recommended pairings for each fish.

Afterwards, everyone came together for a networking dinner.

The event was a great success, leading to more than five new commercial enquiries – with additional conversations pending – for the species highlighted at the workshop as well as other key Scottish species such as mackerel. It also reinforced our relationship with Scottish-Import, an important ambassador of Scottish seafood within the German market.



“

The support we have received from Seafood Scotland has been invaluable in showcasing the outstanding quality of Scottish seafood to our customers from all over Germany, and I am sure this is just the beginning of many future collaborations.”

Stefan Hilger, CEO of Scottish Import

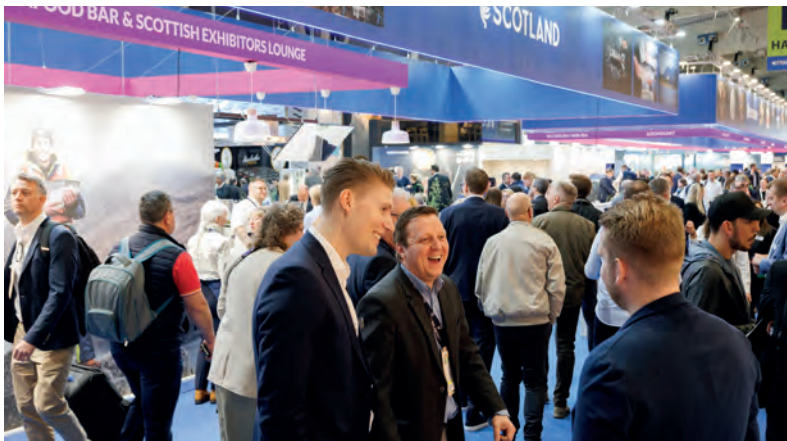


# Spain

## Seafood Expo Global (SEG), Barcelona

One of our flagship events, Seafood Expo Global (SEG) is the world's largest seafood tradeshow. It attracts over 35,000 international trade customers and buyers from 152 countries. In partnership with SDI, we supported the Scotland Pavilion, hosting 14 exhibiting companies and creating a significant presence on the global stage. A key highlight was our seafood bar, where over 200 lunches were served, offering media and business professionals a taste of Scotland's finest, sustainably sourced seafood from a diverse range of suppliers.

Chef Steve Walpole and his team wowed attendees with a bespoke tapas-inspired menu, featuring dishes like scallop ceviche and tandoori monkfish skewers, while his live cookery demo proved a major attraction. High-profile engagements, including a visit from Mairi Gougeon, Cabinet Secretary for Rural Affairs, Land Reform and Islands, underscored the sector's significance.



**Reflecting on the event's success, CEO Donna Fordyce highlighted its role in fostering relationships and driving business growth:**

"A huge benefit of having the Scotland Pavilion is being able to meet new and existing customers in one place. Over the course of the event, we had the pleasure of hosting suppliers and buyers for lunches with premium, delicious, sustainable Scottish seafood through an innovative menu created by the fantastic Steve Walpole and team.

All of this wouldn't have been possible without the dedication and passion of the whole Seafood Scotland team and our partners."

# Market Development: Asia

“

Working alongside Adam and his colleagues at Seafood Scotland, has helped Denholm Seafoods expand our customer base in the Asian markets especially with the presence of Scottish Seafood at major industry events. The teams support and connections with buyers, including retailers, has helped boost the profile of Scottish pelagic fish in this ever-growing market and assisted the industry in significantly increasing its market share in the important Japanese market, while facilitating new growth in Korea, Taiwan and China.”

Richard Duthie, Managing Director, Denholm Seafoods Ltd



## South Korea

Along with SDI, we took part in a food and drink trade mission to identify opportunities for premium Scottish seafood in the world's biggest seafood markets by consumption per capita. The mission was supported by the British Chamber of Commerce in Korea, and attended by Bakka Frost Scotland, Loch Duart Salmon, and Macduff Shellfish.

We visited stores, engaged with buyers from major supermarkets and high-end retailers and had productive discussions with distributors and chefs. We also provided salmon, crab, whelk, langoustines and scallops for an impressive seafood feast at a buyers' reception hosted by His Majesty's Ambassador to Korea at the embassy.

Adam Wing was invited to spend a day with the seafood category buyers at Homeplus, one of the largest supermarket chains in Korea. As a result of this meeting, Homeplus now lists Scottish mackerel under its frozen private label brand.

Adam also delivered a seminar entitled *Why the World's Best Chefs Choose Scottish Seafood: From Flavour to Sustainability* at the Seoul Food trade show, introducing our key messaging to media, influencers, and industry delegates.

Everyone gained valuable insights into consumer trends, behaviours, and product expectations, alongside practical knowledge to ensure smooth trade operations moving forward.





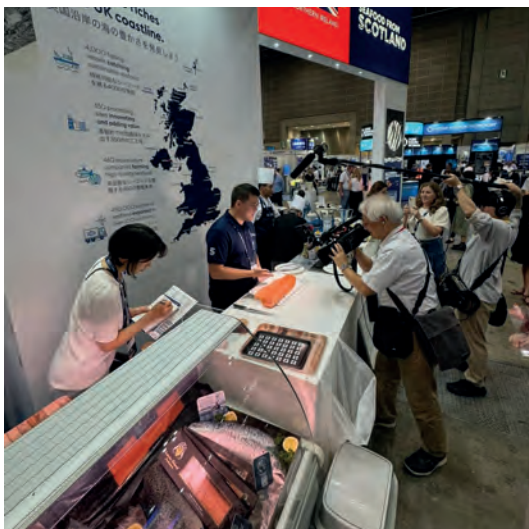
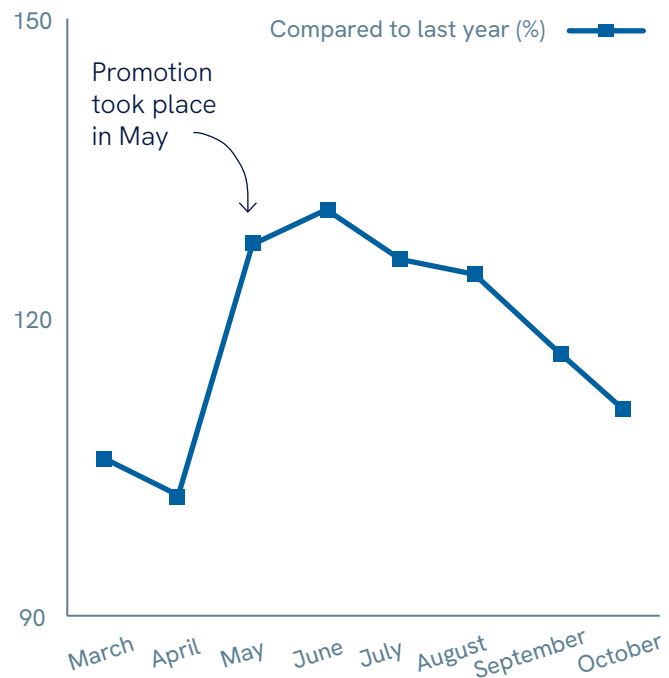
# Japan

Ahead of the team attending the Japan International Seafood & Technology Expo, we invited Mr Tadashi Fujiwara, Japanese Consul General in Edinburgh, to formally open our new office at Ingliston, Edinburgh.

At the expo, we co-hosted a UK pavilion supporting a delegation of eight Scottish seafood companies who used the event to publicly reinforce their commitment to the Japanese market.

We also began discussions with the All-Japan Sushi Association to feature Scottish salmon and mackerel at the 2025 World Sushi Championships. This opportunity could help re-establish Scottish salmon in the market while further positioning Scottish mackerel as a premium choice.

We also expanded a retail promotion with Aeon – Japan’s largest supermarket chain – to 100 stores. These stores promoted Scottish mackerel with sampling, special pricing, and branding. As a result, sales grew by more than 27% YoY with a ripple effect in the months following the promotion. In a key indicator of product acceptance for Aeon, around 80% of their consumers praised the rich, delicious fat content of Scottish mackerel.



# Hong Kong & Singapore

In Singapore, we supported the launch of the Brand Scotland initiative by The Scotland Office. Working with key delivery partners including SDI, The Scotland Office and the British High Commission in Singapore, we identified strategic buyer contacts to invite to the event. Co-hosted by Secretary of State for Scotland Ian Murray and British High Commissioner to Singapore Nikesh Mehta, the event showcased Scottish salmon, oysters, lobster, and langoustines. Guests learned about the premium qualities of Scottish seafood while we explored new export opportunities.

In Hong Kong, we hosted a Scottish seafood market development lunch at the Royal Hong Kong Yacht Club, welcoming 30 trade contacts including buyers and chefs. The event strengthened our relationships with existing buyers while also generating several direct leads for live lobster, oysters, salmon, and smoked salmon.

After a period of limited activity in Hong Kong due to market challenges, we are re-engaging with the market. Partnering with SDI and DBT, we aim to build momentum over the next few years and will consider expanding our work into Macau.



# China

In October, we attended and participated in the China Fisheries & Seafood Expo in Qingdao, focusing on export opportunities in these growing markets. Working alongside partners SDI, DBT, and Seafish, we identified key opportunities for the Scottish seafood sector.

We met with buyers in Qingdao and facilitated introductions to companies in Scotland, leading to sales growth for shellfish species like lobster and crab, as well as securing a new business deal for Scottish mackerel worth over \$200,000.





# Industry Leadership

As the only organisation that represents the entire Scottish seafood sector, our role includes sharing a range of views in many different settings. We:

- Sit on Scotland Food & Drink's Policy and Regulation; Supply Chain; and Net Zero and Environment groups
- Issue newsletters to a growing stakeholder database
- Host PISCES, our forum for the seafood industry (alongside seafood industry colleagues)
- Facilitate the Scottish Nephrops Programme Board
- Manage the *Fish+ in a Good Food Nation* project in collaboration with Nourish Scotland
- Are members of the UK Government's Scottish Seafood Industry Action Group
- Sponsor and/or judge a host of awards including the MSC Awards, Highland and Islands Food & Drink Awards, Fishing News Awards, UK Food Manufacturing Awards, UK Young Restaurant Team of the Year and the Scotland Food & Drink Awards

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## Seafood Scotland partner organisations:

- Aberdeenshire Council
- Defra
- Department for Business & Trade
- Food and Drink Federation Scotland
- Highlands & Island Enterprise
- Industrial Biotechnology Innovation Centre
- Interface
- Opportunity North East
- Salmon Scotland
- SAOS
- Scotland Food & Drink
- Scottish Development International
- Scottish Enterprise
- Scottish Fishermen's Federation
- Scottish Government
- Scottish Seafood Association
- Scottish Seafood Training Network
- Seafish
- Skills Development Scotland
- The Scotland Office
- UK Food & Drink Export Council
- UK Government
- Zero Waste Scotland



# Scottish Ocean Cluster

We announced our intention to launch a Scottish Ocean Cluster in March 2025. Based on its Iceland counterpart, the Scottish version will be tailored to our sector's needs.

The Cluster will serve as a catalyst for innovation and entrepreneurship, bringing together industry leaders to identify and develop new market opportunities. Its goal is to ensure that the economic, environmental, and social benefits generated flow directly back into the Scottish seafood sector.

We aim to appoint a full-time project manager to support our cluster and work alongside Seafood Scotland and the Cluster steering group – which includes Opportunity North East, Aberdeenshire Council, Zero Waste Scotland and IBiolC – to ensure that Scotland is in a vanguard of countries with the ambition, knowledge and commitment to foster prosperity for the industry for decades to come.

We seek to build on the success of the Iceland Ocean Cluster model, adapting it to the Scottish context to increase the valorisation of high-value seafood side streams, share best practice, and harness emerging opportunities, including:

- 1. Collaboration and innovation** – bringing together industry leaders, entrepreneurs, investors, researchers and more to develop high-value side stream value chains.
- 2. Market development and awareness** – identifying opportunities and raising awareness of the potential for creating sustainable, value-added products.
- 3. Economic growth and job creation** – increasing the economic value of the seafood sector while generating skilled, high-paying jobs across Scotland, particularly in coastal communities.
- 4. Industry sustainability and resilience** – strengthening Scotland's seafood sector by driving long-term innovation, investment, and future opportunities.

## Key Outputs

- Increased profits and productivity – maximising the value of seafood side streams, creating new high-value markets and building processor resilience.
- Improved environmental sustainability – promoting 100% utilisation of fish, including high-value by-products currently discarded at sea, such as langoustine heads and white fish viscera.
- Entrepreneurship and job creation – driving innovation, increasing start-up activity, and expanding bio-manufacturing in Scotland, generating skilled, high-paying jobs, particularly in coastal communities.
- Improved food security – converting more high-value by-products into food products like fishcakes and fish fingers, reducing reliance on imports.
- Attraction of funding and investment – strengthening the blue economy by securing investment and fostering economic development across the Scotland.

“

Bringing biotech expertise together with innovators in the seafood industry has the potential to triple the value of Scotland's seafood side streams.”

Donna Fordyce





# Learning journey

## Insights from Iceland

Seafood Scotland continually looks beyond the UK for innovative approaches and best practices that can drive progress in our own seafood industry. Iceland stands out as a global leader in this regard – it was the first country to establish a dedicated seafood cluster, built on its pioneering #100percentfish strategy, which maximises value from every part of the catch.

Donna Fordyce and members of the Scottish Ocean Cluster steering group embarked on a learning journey to the 2024 Fish Waste for Profit conference in Iceland. Their goal was clear: to explore cutting-edge technologies and business models that could enhance sustainability and profitability within our own Scottish seafood sector.

The team gained invaluable insight into Iceland's advanced methods for utilising every part of the fish, which not only reduces waste but also unlocks significant economic value: the price of fish skins in Iceland has now surpassed that of the fillets themselves, highlighting the untapped potential in byproducts.



Many thanks to the following companies for generously sharing their time and insights during our learning journey, offering valuable perspectives on innovation and sustainability in Iceland's seafood industry:

- **Hefring Marine** - developing AI for onboard decision-making to reduce fuel costs and injury risks.
- **Eylf** - creating natural food supplements from chitosan and seaweed.
- **North Marine Ingredients** - specialising in marine by-product utilisation via cold adaptive enzyme technology.
- **Marel** - providing equipment, software, systems, and services to the food processing industry.
- **Matís** - Iceland's leading food research and biotech institute.
- **Héðinn** - producing machinery for protein extraction and fishmeal production.
- **S-Iceland** - collecting, processing, freezing and selling seafood biomass and by-products.
- **Primex** - global leader in sustainable, high-quality chitosan production.
- **Optitog** - developing light-based fish technology for efficient, sustainable trawling.

Special thanks to the **Iceland Ocean Cluster** for sharing their insights and inspiring story of fostering innovation and entrepreneurship in Iceland's blue economy, as well as for helping co-ordinate our visits.



# Skills Seafood in Schools

In 2024 we undertook extensive research and development to design a comprehensive plan for secondary school lessons that will be available to teachers throughout Scotland. Tailored to the broad general education (BGE) curriculum, these lesson plans provide teachers with the resources to introduce young people to the health benefits of eating seafood, the importance of sustainability in the industry and the wide variety of career opportunities involved in the sea-to-plate journey of Scottish seafood.

To ensure the programme met the needs of both educators and students, we conducted focus groups with teachers across Scotland. These discussions provided invaluable insight into how seafood is currently incorporated into lessons, both in terms of its nutritional value and career pathways it offers.

Using these findings, we developed a suite of high-quality learning resources designed to support teachers in delivering engaging and informative lessons, including:

- Presentations for students on industry and careers, nutrition and sustainability
- Detailed lesson plans aligned with the curriculum
- Worksheets to reinforce key learning outcomes
- Risk assessment forms to facilitate hands-on learning experiences
- Posters for classrooms, including a species guide and taste/texture matrix to encourage new seafood tastings

We are also actively developing *Teach the Teacher* training sessions. These will provide educators with the knowledge, skills, and resources they need to confidently teach students how to cook with seafood.

All these resources will launch in Spring 2025 and we look forward to inspiring the next generation to embrace and appreciate our wonderful Scottish seafood.







# Scotland Food & Drink

We remain committed to supporting Scotland Food & Drink's ten-year strategy, Sustaining Scotland. Supplying the World. As part of this, our CEO Donna Fordyce chairs the People and Entrepreneurial Skills advisory group, which focuses on building a more skilled and resilient workforce for the future. Among other activities, the group leads an ongoing communications campaign to inspire people to choose a career in the food and drink sector and highlight the diverse opportunities within it. It also engages with companies to support employees in gaining new skills.

## Fostering connections

As part of our ongoing commitment to encourage more people to work within the Scottish seafood sector – and upskill those who already are – we are members of the Scottish Seafood Training Network and a steering group member for UK Seafood Jobs.

Both communities are dedicated to skills development and career progression, helping connect individuals with training opportunities and supporting employers in meeting their workforce needs.



## Ambassadors

In collaboration with STEM Ambassadors in Scotland and aligning with the Scotland Food & Drink Ambassadors programme, we launched a Scottish Seafood Ambassador scheme. This initiative invited industry professionals to attend two introductory sessions in February 2025 to explore how they can inspire and educate the next generation about seafood careers.

We aim to create a community of ambassadors that support Seafood in Schools, ensuring the project's longevity. They will help us track success, identify activity hotspots and develop new resources featuring real-life seafood career stories – such as the recent creation of five career profile videos showcasing roles in sales, logistics, processing, fishing, and retail.

A Scottish Seafood Ambassador toolkit will be developed next year to support this activity.





# Orkney / Shetland

In July 2024, we travelled to Orkney and Shetland for a valuable opportunity to directly engage with the people behind the islands' thriving seafood industry.

We met with a wide range of people in the sector, including shellfish farmers, processors and smokehouse operators. Local professional organisations shared valuable insight into the unique challenges faced by those working in these remote island communities. We also visited UHI Shetland's Centre for Sustainable Seafood to learn how it collaborates with industry to drive progress around sustainability and innovation across the sector.

Understanding these perspectives is crucial as we work to advocate for and support the long-term resilience of Scotland's seafood industry.



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## Festivals

Festivals are a fun and engaging way to reach consumers and showcase the traditions that make our coastal communities so special.

### Stranraer Oyster Festival

The Stranraer Oyster Festival is an annual celebration of Scotland's last remaining wild native oyster bed. This year it was featured on BBC's Countryfile, shining a well-deserved spotlight on this spectacular seafood tradition.

We're proud to sponsor the Scottish Oyster Shucking Championships - better known as the #ShuckOff. Supporting this event helps us champion our seafood heritage, engage with consumers, and celebrate the people behind the industry.



### Festival of the Seas @ The Barras

This annual event is a vibrant celebration of local fishing culture, jointly run by the Clyde Fishermen's Association and Clyde Fishermen's Trust. In March 2025 it was held at the Barras Market in Glasgow for the first time. As Scotland's oldest street market, the Barras is an iconic location with over 100 years of history.

The celebration featured activities for all ages including live music, face painting, fish-themed activities and crafts by local artisans. The event was a wonderful opportunity for us to celebrate Scottish seafood, support our fishing communities and connect with Glasgow's historic ties to the sea.







# Communications

Our social media channels help us engage a wide range of audiences, from industry professionals to policymakers, by providing valuable insights and timely updates. Our presence on LinkedIn and X ensures we remain visible and connected to key conversations, while our Instagram content strengthens relationships with chefs and restaurateurs.

This data snapshot offers an overview of our social media performance over the past year, showcasing the progress we've made in building a stronger community around Scotland's world-class seafood sector.

## Social media stats April 2024 - March 2025

### LinkedIn:

Impressions:	Engagements:	Posts:	Net new followers:
230,690	34,203	180	1659

### X:

Impressions:	Engagements:	Posts:	Net new followers:
60,064	2,691	349	0

### Instagram:

Impressions:	Engagements:	Posts:	Net new followers:
916,144	17,242	728	2,003

#### Noteworthy followers:



**Tom Kitchin**  
@tom\_kitchin



**Calum Franklin**  
@chefcalum



**Claude Bosi**  
@claudebosi1



**Jean-Philippe Blondet**  
@jeanphilippeblondet



# External engagement

Seafood Scotland is a small team of seven, so we rely on a number of external channels to engage with different audiences in the UK and overseas. We engage with thought leaders and policymakers across business, industry and the media to ensure people who work outside our industry understand the importance of what we - collectively - do, and why it matters.

For example, leading up to the Responsible Seafood Summit, we worked with Scottish national newspaper The Herald to create two feature pieces, including an interview with Donna Fordyce, on our commitment to drive further innovation and to create new income streams. We also make time to speak to trade publications to build their knowledge of our priority projects.



# Social circles

Digital communication is key to creating awareness and a deeper understanding of our work. For industry and B2B engagement, our primary channels are LinkedIn and X, with Instagram appealing to slightly different audiences:



**LinkedIn:** Providing insight into our work and highlighting strategic shifts and key trends for trade audiences. The What, Why and How we do things.



**X:** Real-time updates and rapid-response engagement with industry news, ensuring we remain at the heart of conversations within the seafood sector.



**Instagram:** A visual-led platform to engage with chef, restaurateurs, and everyone who loves seafood - with video content especially popular.

We also distribute a fortnightly e-newsletter, which reaches a database of over 250 contacts.

With these methods, we keep stakeholders, policy makers and industry players informed of key developments, market opportunities, and relevant trends within the sector.





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# A Scottish heart with a global mindset, we're proud to be **Seafood Scotland**



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**APRIL 2025**

