Gwynedd and Anglesey Local Fisheries Strategy
European Fisheries Fund: Axis 4

Local Partnership	Gwynedd and Anglesey Fisheries Local Action Group
Administrative Leader	Menter Môn, Llys Goferydd, Bryn Cefni, Llangefni, Ynys Môn, LL54 5RB

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1.0 EXECUTIVE SUMMARY

1.1 Anglesey and Gwynedd are cooperating on the creation of a single Fisheries Local Action Group (FLAG) across both counties. The first task of the FLAG is the creation of Local Fisheries Development Strategy (LFDS) and Implementation Plan which will be assessed by the Welsh Government. If successful the FLAG will be able to access funding through the Axis 4 European Fisheries Fund (EFF).

1.2 Activities will be aimed at supporting sustainable development of fisheries areas and is available to FLAGs who represent the fisheries areas in which they are based, and who implement an Axis 4 local development strategy for their area. The aim is to increase the capacity of the local fishing communities and the business networks to build knowledge and skills, innovate and cooperation to tackle local fisheries development objectives.

1.3 The lead body responsible for delivery will be Menter Môn, the Local Action Group for Anglesey. Having delivered Axis 4 and Leader projects since 1995 it has the experience and skills to deliver on behalf of the Anglesey and Gwynedd FLAG, with offices located in both counties. It is also involved in the delivery of Rural Development Plans in Gwynedd and has strong links with the both local authorities and economic partnerships.

1.4 The FLAG is required to decide whether the strategy is to based mainly on exloiting value within the fishing value chain or the pursuit of business growth under a wider ‘local development’ approach. This decision is influenced by the role fishing has within the local economy. Where it has become a largely residual activity it is more realistic to adopt a wider local development approach that will benefit those not directly linked to fishing as well as from within the fishing communities. Given the scale of the fishing industry in Gwynedd and Anglesey it is seems appropriate to adopt this wider approach.

1.5 Guidelines on the preparation of the LFDS were provided by the Welsh Government which involved research, consulation, analysis and outline of key objectives. However it is important to emphasise that the Leader approach will encourage bottom up engagement whereby activities and projects will be dictated largely by the participants.

1.6 This strategy sets out a single global objective and six key objectives. These are aimed at empowering the fishing community through the provision of locally based resources and service, and encouraging a more proactive role in the conservation of the maritime environment. There is also an emphasis on engaging with the wider business community in order to improve the profile and availability of local seafood.

2.0 DESCRIPTION OF AREA

2.1 FLAG Partnership Details

2.1.1 Aims and Objectives

The aim of the Anglesey and Gwynedd Fisheries Local Action Group (FLAG) is to support the fishing industry and associated communities in both counties through the delivery of a range of actions and activities. The FLAG is representative of the sectors it supports and will encourage a bottom up approach in order to develop viable and sustainable projects.

The FLAG for Anglesey and Gwynedd will contribute towards achieving this aim by pursuing the following objectives:

- Adding value to fishery products
- Encouraging diversification of economic activity
- Preserving and enhancing the environmental, cultural and social welfare
- Empowering the local fishing communities.

2.1.2 Function

The FLAG's primary purpose will be to develop and deliver projects which fit with the Axis 4 European Fisheries Fund (EFF) using the LEADER approach. The FLAG membership represents the fishing sector as well as the wider coastal community.

2.1.3 Lead Body

The lead body responsible for delivery will be Menter Môn, the Anglesey Local Action Group. Having delivered Axis 4 and Leader projects since 1995 it has the experience and skills to deliver on behalf of the Anglesey and Gwynedd FLAG. It is also involved in the delivery of Rural Development Plans in Gwynedd and has strong links with the both local authorities and economic partnerships.

2.2 The FLAG Partners and Area Representation

The FLAG area is all of the Isle of Anglesey and all the coastal wards in Gwynedd. It was decided to include all of Anglesey as it is largely defined by the coastline and nowhere is more than 20 minutes from the sea. The communities with the strongest link with fishing are Holyhead, Amlwch, Menai Bridge and Cemaes Bay.

In Gwynedd it was decided to include all coastal electoral wards. This will include the whole of the Llyn Peninsula, which like Anglesey is largely defined by it's proximity to the sea. Following electoral ward boundaries will also facilitate the process of defining eligible and no eligible areas. The communities with the strongest link with the fishing industry are Aberdyfi, Barmouth, Caernarfon, Porthmadog, Pwllheli, Aberdaron, Morfa Nefyn and Trefor.

The decision to include Gwynedd and Anglesey within a single FLAG was made for administrative and practical reasons. Firstly there is a great deal of cooperation between both Counties with Menter Môn active on both sides of the Menai Straits, these include RDP, Business Support and Convergence projects. Secondly, there has also been cooperation within the fishing industry in both Counties. Lastly, both Counties "share" the Menai Straits which is an important area for the fishing industry, especially shellfish. It is very likely that projects involving fisherman from both sides of the Straits will be developed and having a single FLAG will improve implementation and delivery.

The FLAG membership is diverse and representative in terms of geography, expertise, skills and sectors. The table below provides details of the members and what their main role will be within the group.

Anglesey and Gwynedd FLAG Membership		
Name	**Organisation / Profession**	**Rational for membership**
Richard Dwyer	North Wales Fishing Cooperative Limited	Representative of the fishermen of Anglesey and has been actively involved in this representation for over 8 years
	Llyn Pot Fishermans Association	Representative of a group of fishermen operating in Gwynedd.
Brett Garner	Llyn Fishing Association	Representative of a group of fishermen operating in Gwynedd
James Wilson	Bangor Mussel Producers Ltd	Representative of the mussel group covering the Menai Straight. Active environmental marine biologist
Dr Mark Rigby	Llyn Aquaculture	Representative from Gwynedd Aquaculture sector
Dr David Fletcher	RAS Aquaculture Research Limited	Representative from Anglesey Aquaculture sector
Phil Scott	Synergy Yachting	Member of the Anglesey Regeneration Partnership and Anglesey Tourism Association
Gwynedd Watkin	Undeb Amaethwyr Cymru	Chairman/Member of the Gwynedd Economic Partnership
Gwyn Jones	Oriel Plas Glyn y Weddw	Member of the Gwynedd Economic Partnership and manager of Oriel Plas Glyn y Weddw.
Gwawr Price/ Andrew Forfar	Tourism Partnership Mid Wales/North Wales	Member of the Gwynedd Economic Partnership and representatives of the North and Mid Wales Tourism Partnership

2.3 Fisheries Area

The area selected for the FLAG includes all of Ynys Mon and every coastal ward in Gwynedd. This area includes communities with strong historical links to fishing, as well as many with active fishing related businesses. Among them are towns and villages such as Holyhead, Amlwch, Menai Bridge and Cemaes Bay in Ynys Môn, and Aberdyfi, Bangor, Barmouth, Caernarfon Porthmadog, Pwllheli, Aberdaron, Morfa Nefyn and Trefor in Gwynedd

The region has a low population density and many coastal towns and villages are experiencing disproportionate demographic change compared to other regions in North Wales. This is mainly due to the outmigration of young people due to a lack of employment opportunities, coupled with in-migration of older people retiring to the area.

From data extracted from the 2009 mid-year population estimates (ONS ward data) the average population density across Ynys Mon is 0.96 persons per ha. The total population is 68,600 of which 22% are concentrated around the ports of Holyhead (16%) and Amlwch (6%). All wards within Ynys Mon have a small population never exceeding 2600.

In the Gwynedd the population density is 3 persons per ha with the majority of coastal wards having small populations : Aberdyfi: 1,127, Barmouth: 2,461, Menai (Caernarfon): 2,356, Menai (Bangor): 2,781,Porthmadog: 3,488, Aberdaron: 1,058, Morfa Nefyn: 1,274 and Terfor: 1,604 (Llanelhaearn ward)

At its height, both counties had a strong dependency on fishing and is seen as one of its oldest industries. On Anglesey, villages such as Moelfre and Cemaes Bay derived substantial income from fishing and related industries and both had a strong fishing fleet. Amlwch Port was a major shipbuilding port not only noted for shipbuilding and trade with the mainland and Ireland, but also for a strong and vibrant inshore fishing fleet.

Along Gwynedd's 301km coastline, and in particular along the North Llyn Coast and in Nefyn, there was a sizable fishing industry, with Nefyn being known as the 'Herring Capital of Wales. The sea continues to provide one of the greatest potential resources these communities have in securing their future development.

However the fishing industry has lost its prominence and status in the region, and its contribution to the local economy continues to decline. On Anglesey, Holyhead is the only port that is able to provide landings data . Over the last five years there has been a decline in landings from £2.2 million to £1.9 million ie a 14% reduction in relative value. There has also been a significant decrease in catch other than shellfish, with nothing recorded from 2008 to 2010.

In Gwynedd, the figures for total catch mirrors the number of vessels although the picture varies. In Pwllheli the tonnage recorded has reduced by 61% from 2008 to 2010, and by 60% in Morfa Nefyn over the same period.

There has also been a significant decrease on Anglesey in registered vessels over the same period, with vessels under 10m (making up most of the Welsh fishing fleet) decreasing from 72 vessels in 2007 to 58 in 2011, a decrease of 20% compared to Wales as a whole having only decreased by 4%.

In Gwynedd, over the last 10 years, the number vessels operating from the ports has fluctuated significantly from 12 in 2000 to 7 in 2010 and up to 52 in 2007 and slowing declining since that date to 47 in 2010.

2.4 Social, Economic and Environmental Context

The FLAG region includes Anglesey and Gwynedd. While both regions share similar social, economic and environmental characteristics many of the statistics are presented on a county basis. We are therefore presenting the information separately for both areas. It is also worth noting that it is very difficult to disaggregate data for the coastal regions from the rest of the county. However there is not a significant difference in social economic terms between costal and non-coastal regions

2.5 Anglesey

2.5.1 Overview: Anglesey is the largest of the Welsh Islands situated off the North West coast of Wales and is connected to the mainland by the spectacular and iconic Menai and Britannia bridges. It extends to 71,511 ha with 201 Km of coastline, which is substantially (95%) designated as an Area of Outstanding Natural Beauty (AONB) extending to 22,000 ha. The Island's rich heritage also encompasses an outstanding natural history, a varied and crucially important wildlife, a rare geology, a significant built heritage and a Welsh culture that remains vibrant to this day.

The main settlements are Llangefni, Menai Bridge, Llanfairpwll, Llangefni, Beaumaris, Amlwch and Holyhead. The County Council is situated in the market town of Llangefni, with Holyhead dominated by the Port. Generally the towns and villages situated along the Menai Straits are more affluent than those to the North.

2.5.2 Demographic Profile: The population on Anglesey is getting older at a rate that cannot be accounted for by natural change alone; there is net out migration of young people, but net in migration of older people. The aging population is leading to reductions in available workforce however recent European migration trends may be partly offsetting this problem. The current population estimate for Anglesey is 68,900 thousand, of which 41,300 are within the economically active age band (16-64).

The total number of people in employment in Anglesey is around 29,500. Of these, just under 25,000 are employed and the rest are self-employed. The public sector is an important employer on Anglesey and accounts for over 30 per cent of the workforce. The Anglesey workforce is distributed into the following occupations:

- managers and senior officials - 12 per cent
- professional occupations - 12 per cent
- associate professional and technical occupations - 15 per cent
- administrative and secretarial - 10 per cent
- skilled trades occupations - 14 per cent
- personal service occupations - 11 per cent
- sales and customer service occupations - 7 per cent
- process, plant and machine operatives - 7 per cent
- elementary occupations - 11 per cent

2.5.3 Economy and Labour Market: In 2009 the average weekly wage for all employees on Anglesey was £506.40, which is broadly in line with the average for Wales.

Overall prosperity levels on the Island are continuing to decline. This is illustrated by the Island's high levels of social deprivation, increasing unemployment rate and economic inactivity, continued youth out migration, the lack of indigenous entrepreneurial activity, and the prevalence of a number of small scale, low-skill employment sectors. The Island's GVA level is currently only 56% of the UK average.

Like many other areas of the UK, Anglesey is currently witnessing an unprecedented number of redundancies and a significant contraction of its industrial sector. Since 2009 several large manufacturing companies have closed or significantly reduced their workforce. These include Eaton where job numbers have fallen from 300 to about 35, and Anglesey Aluminium which saw a reduction from 540 to about 80. More difficult to calculate is the indirect impact on jobs among contractors and suppliers as only job losses of 20+ are officially notified.

Despite these negative trends, continued collaborative efforts are being undertaken to minimise adverse impacts and capitalise on opportunities. The Welsh Government led "Môn a Menai" Programme has seen considerable additional regeneration funding being targeted to improve physical infrastructure, support the economically inactive, and further develop local coastal facilities. Funding has been secured from the EU Rural Development Programme to support businesses and communities, whilst the EU Convergence Programme is providing financial support to small businesses, helping to improve coastal facilities, and strengthening deprived town centres.

Coleg Menai also opened a new Energy and Fabrication Learning Centre on the Island in 2011. The tourism sector continues to grow in significance, with sustained activity to raise the quality and standard of provision, improve marketing activities, capitalise fully on the cruise market, and extend the season. The profile of the island has also been boosted by the presence of Prince Willliam at RAF Valley.

There have been a small but significant number of new job creation projects in the retail sector - these include the new Morrison's store in Holyhead (c. 250 jobs), and the new Iceland (c. 15 jobs) and Aldi (c. 10 jobs) stores in Llangefni. However such retail jobs are mainly part-time in nature.

In addition, it seems increasingly likely that Anglesey will see a new nuclear power station at Wylfa. This would represent a massive multi-billion pound investment, creating up to 4,000 jobs during construction and up to 1,000 skilled workers when operational. Servicing opportunities could also create new employment in key strategic sites such as Parc Cybi.

As part of the Energy Island Framework, the Energy sector is the most likely means of ensuring the Island's people and communities can create a more prosperous future. Indeed, the economic and employment potential is so great that further pursuit and attainment of the local energy goals could provide the catalyst and create the necessary 'engine' to turn round the current declining fortunes of the North West Wales economy.

2.5.4 Skills and Qualifications:

2.5.5 Deprivation: According to the Welsh Index of Multiple Deprivation (WIMD), as revised by the Welsh Assembly Government in 2005, a resident population of 7,400 persons, or 11% of the total Anglesey population, are living in localities ranked amongst the 20% most deprived areas in Wales. These pockets of deprivation are characterised by high unemployment, low incomes, health problems, etc. They are urban in character, with a cluster at Holyhead, and parts of Llangefni and Amlwch also included.

2.5.6 The Environment: Much of Anglesey is covered with relatively intensive cattle and sheep farming aided by modern agro-chemicals. In these areas the native vegetation and wildlife have essentially been destroyed. However there are a number of important wetland sites which have protected status. In addition the several lakes all have significant ecological interest including their support for a wide range of aquatic and semi-aquatic bird species. In the west, the Malltraeth Marshes are believed to be supporting an occasional visiting bittern and the nearby estuary of the Afon Cefni supports a bird population made internationally famous by the paintings of Charles Tunnicliffe, who lived for many years – and died at - Malltraeth on the Cefni estuary. The RAF airstrip at Mona is a nesting site for skylarks. The sheer cliff faces at South Stack near Holyhead provide nesting sites for huge numbers of auks including puffins, razorbills and guillemots together with choughs and peregrine falcons. Three sites on Anglesey are important for breeding terns – see Anglesey tern colonies. There are significant occurrences of the Juncus subnodulosus-Cirsium palustre fen-meadow plant association, a habitat characterised by certain hydrophilic grasses, sedges and forbs.[11] Anglesey is home to several species of tern, including the Roseate Tern.

Anglesey is home to two of the UK's small number of remaining colonies of red squirrels, at Pentraeth and Newborough.[12]

Almost the entire coastline of Anglesey is designated as an Area of Outstanding Natural Beauty The coastal zone of Anglesey was designated as an AONB in 1966 and was confirmed as such in 1967. It was so designated in order to protect the aesthetic appeal and variety of the island's coastal landscape and habitats from inappropriate development.

The AONB is predominantly a coastal designation, covering most of Anglesey's 125 miles (201 km) coastline but also encompasses Holyhead Mountain and Mynydd Bodafon. Substantial areas of other land protected by the AONB form the backdrop to the coast. The approximate coverage of the

Anglesey AONB is 221 km², and it is the largest AONB in Wales, covering as it does one third of the island.

A number of the habitats found on Anglesey are afforded even greater protection both through UK and European designations because of their nature conservation value, these include:

6 candidate Special Areas of Conservation (cSACs) 4 Special Protection Areas (SPAs) 1 National Nature Reserve 26 Sites of Special Scientific Interest (SSSI) 52 Scheduled Ancient Monuments (SAMs)

These protected habitats support a variety of wildlife such as Harbour Porpoises and Marsh Fritillary.

The AONB also takes in three sections of open, undeveloped coastline which have been designated as Heritage Coast. These non-statutory designations complement the AONB and cover about 31 miles (50 km) of the coastline. The sections of Heritage Coast are:

1. North Anglesey 28.6 km (17.8 mi)
2. Holyhead Mountain 12.9 km (8.0 mi)
3. Aberffraw Bay 7.7 km (4.8 mi)

2.6 Gwynedd

2.6.1 Overview: Gwynedd is the second largest county in Wales in terms of land area covering 2,548 square kilometres. Gwynedd is noted for its unique linguistic and cultural heritage and its exceptional landscape and natural environment. 67.5% of the area of Gwynedd is designated as part of a National Park, the highest proportion of any unitary authority in Wales. With 301 kilometres of coastline, Gwynedd is also the largest coastal authority in Wales. 88 kilometres of its coastline, along the Llŷn Peninsula, has been designated a Heritage Coast.

The main settlement in Gwynedd are Caernarfon , Bangor, Porthmadog, Pwllheli and Dolgellau. Gwynedd adjoins Anglesey to the north, Conwy and Denbighshire to the east, Powys to the South east and Ceredigion to the south. Caernarfon is the County's main administrative centre, a historic town on the Menai Straits.

Gwynedd is characterised by a mountainous upland landscape, wide areas of high open countryside and a long coastline; the quality of which are demonstrated by the presence of the Snowdonia National Park and Areas of Outstanding Natural Beauty such as the Llŷn Peninsula. The area is sparsely populated with its inhabitants living in small settlements scattered over a wide geographic area.

2.6.2 Demographic Profile: The population of Gwynedd is in the region 118,200. The population structure in Gwynedd shows a population peak in the 50-54 age bracket, followed by a substantial percentage being aged 55 and over. The lowest proportion of population by far is in the 25-29, 10-14 and 15-19 age groups respectively, and this in spite of the presence of a substantial student population.

The general ageing demographic profile of the local population is compounded by in-migration of older individuals and the outflow of young people. This is starkly illustrated by the proportional changes in the population between 1995 and 2008:

Age	1998 Wales	2008 Gwynedd
All Ages	3.2	0.7
0	5.3	-9.0
0-4	-5.8	-12.1
5-9	-15.2	-12.7
10-14	-4.6	-0.1
15-19	12.2	8.1
20-24	28.7	9.1
25-29	-9.5	-12.6
30-34	-24.7	-25.1
35-39	-3.6	-5.5
40-44	15.3	8.4
45-49	7.8	3.4
50-54	-4.7	-9.3
55-59	18.8	13.6
60-64	31.4	35.5
65-69	9.0	5.6
70-74	-1.1	-3.0
75-79	-5.1	1.4
84	20.7	25.7
85+	28.0	8.1

Statistical Directorate, Welsh Assemnbly Government

2.6.3 Economy and Labour Market: The public sector is the single largest employer in Gwynedd, the three largest public sector organisations are the local authority based in Caernarfon, Pwllheli and Dolgellau (7,000 employees), the National Health Service centred around Bangor but also employing throughout the county (5,000 employees) and the University of Wales, Bangor (employing 2,200). Redundancies are very likely in the public sector in 2012 which, along with the current pay freeze, will have a direct impact on spend in private sector .

In North West Wales, Gwynedd accounts for a significant proportion of all jobs in agriculture. Research for the Welsh Assembly Government (North West

Wales Economic Futures, 2006) has identified that employment in the sector has declined sharply between 1998 and 2001 with a slight improvement in the past few years. Overall employment in agriculture is anticipated to continue to decline. This reflects the closure of smaller farms and the substitution of machines for labour in larger farms. The main factor leading to employment decline in the medium term is the diversification from food producing to other activities in the rural economy. Many who used to work in farming may continue working in the same place, but in different activities. However, many in the industry believe that diversification cannot be a panacea for the continuing decline of agriculture. As in other sectors the process of internationalisation / globalisation has resulted in intense competition from countries with cheaper production costs.

The third significant sector in Gwynedd is the tourism industry. Over 70% of employment in Gwynedd is in public sector or distribution, retail, hotels and restaurants. The industry is, therefore, a significant source of employment and wealth generation in the County and employment in the sector has continued to grow in recent years, and is well dispersed throughout the county. However , this sector is also facing significant structural challenges; as leisure patterns continue to change and develop the importance of a quality local offer increases as does the significance of niche markets.

The changing nature of employment in Gwynedd and sectoral composition of the local economy, between 1998 and 2005, is illustrated below:

Industry	**Gwynedd**	**NWW**	**Wales**
Primary/utilities	-43.0	**-37.8**	-22.6
Manufacturing	-2.3	**0.8**	-18.9
Construction	-1.0	**-7.8**	4.8
Distribution, hotels and restaurants	24.2	**27.9**	13.9
Transport and communications	9.1	**41.3**	38.1
Banking, finance and insurance, etc	30.6	**30.6**	39.0
Public administration, education & health	31.6	**21.7**	29.7
Other services	65.9	**36.7**	23.6
Total	24.0	**21.2**	14.6

Economic performance in Gwynedd has been mixed in recent years. Whilst there has been strong growth in employment (24% between 1990 and 2005) the gap in prosperity between the area and the rest of Wales and the UK has continued to grow. Growth in the Gwynedd economy between 1995 and 2004 (based on GVA) has been only 13.4% - significantly below 17.1% average across North West Wales and the 18.9% average across Wales. In a period where significant investment has taken place in developing the Gwynedd local economy the relative prosperity of the area has fallen; GVA per head in Gwynedd has reduced from 78% of the UK average in 1995 to only 70% in

2004 - demonstrating the underlying vulnerability and weakness of the local economy.

The North West Wales Economic Futures study commissioned by the Welsh Government made projections of how the industrial structure of the North West Wales economy could change in the next fifteen years. Approximately one third of new jobs are expected to be in the health and social care sector, with growth also anticipated in the leisure and tourism sector and then the knowledge economy.

The projections indicate:

- A significant decline in primary activities over the period with the loss of some 176 jobs, mainly in agriculture
- Some further job loss in manufacturing, construction and utilities, amounting to the loss of around 300 jobs over the period, nearly half of which are in the manufacturing sector
- Strong growth in the service sector activity – both marketed and non-marketed services –with the creation of 2,234 jobs. Employment growth is expected in health and other services and real estate/ business activities

This results in a net increase of 1,760 jobs for Gwynedd as a whole, a percentage increase of 4.6%. Rural South Gwynedd is the area identified as likely to be most affected by employment decline in the agricultural sector due to its slightly higher dependence on employment in agriculture and food processing. However, the area is anticipated to benefit from projected growth in leisure and tourism.

2.6.4 Skills and Qualifications: In 2003-04 , there was a higher proportion of the working age population in work or available to work with qualifications compared to the Wales average. Despite this, 5,200 people were economically inactive and without any qualifications.

Many reports and studies such as Future Skills Wales 2005 have noted that there is a clear gap between the skills needs of employers and the local skills base and this was more evident is certain sectors in the economy such as manufacturing, finance, health and education, etc.

The Gwynedd Skills Study 2003 shows that 52% of the employers questioned noted a clear gap between the skills that young people have when leaving school or college and the skills that they require as employers. These included communication, literacy, numeracy and team working skills.

Improving the skills of the local labour force has been identified as a key challenge, given the current economic base of the region and the nature of the current and future trends. The lack of major growth sectors, such as high value knowledge or services, makes the local economy vulnerable in the short and long term; without significant investment in skills and knowledge of the local labour force to allow it to adapt more easily to the changing needs of the economy. Embedding entrepreneurship skills has been identified as key to Gwynedd's rural economy.

2.6.5 Deprivation: The rural and peripheral nature of Gwynedd is also evident in the conclusions of the 2008 Welsh Index of Multiple Deprivation, in which a high proportion of the county is defined as being among the most deprived in Wales in relation to access to services:

Furthermore, in terms of mean annual household incomes across Wales, Gwynedd is consistently near the bottom of the incomes league. In 2006 Gwynedd was third lowest of all Welsh Local Authority areas – with only Blaenau Gwent and Merthyr Tydfil being lower. A large proportion of the most rural wards in Gwynedd are in the lowest income category (Wales Rural Observatory 2003), with most of the wards displaying the lowest household incomes being in the most rural peripheral areas.

2.6.6 The Environment: The area is principally rural in nature with a rich and varied landscape. The landscape and habitats, together with the species dependent upon them, are recognised as being of local, national and international value. A substantial part of the County, 174,200 ha (63%) has been designated as a National Park, 15,500 ha (5.6%) as an Area of Outstanding Natural Beauty and 88 kilometres of the coastline as Heritage Coast.

With regards to biodiversity, 66 sites have been designated as National Nature Reserves or Sites of Special Scientific Interest within the Plan area and 1,500 as sites of nature conservation interest (Wildlife Sites).

In accordance with European Directives for birds and habitats, two sites have been designated as Special Protection Areas and five sites as prospective Special Areas for Conservation. Three of these sites are maritime sites with the areas, which are Pen Llŷn a'r Sarnau, Aber Menai and the Menai Straits and Conwy Bay, comprising over 90% of Gwynedd's coast and coastal waters.

There are 2235 Listed Buildings and 40 conservation areas within the Plan area. A high percentage of the County has been registered as a landscape of special historic interest and there are 211 Scheduled Ancient Monument sites within the Plan area.

The County's landscape has been assessed using the LANDMAP process. The public perception exercise, which was part of this process, clearly demonstrated that people considered the environment important both as regards nationally designated sites or those of local value. The exercise showed the desire of local inhabitants to safeguard the environmental diversity of the County.

Examination of indicators gathered from a wide variety of established sources indicate that the quality of the air and water in Gwynedd are generally considered to be comparatively good. The Ecological Footprint, which is one way of measuring how the population’s lifestyle impacts on the planet, has shown that Gwynedd has an ecological footprint of 5.28 gha per capita. The significance of the ecological footprint result for Gwynedd is that at current levels of consumption the county is unsustainable.

Gwynedd has many natural resources, which derive from renewable sources. The forests, rivers, the power of the tides and coastal currents are examples of these. In addition, the location and nature of the landscape contributes to the potential for the use of wind power.

Environmental quality is important to the wellbeing of Gwynedd's economy. The beauty and character of the area and its healthy environment attract both visitors and investment. These natural attributes also tend to attract immigrants, which have diluted the ‘Welshness’ of many coastal and rural communities over time.

2.7 Coastal capture fisheries in Wales, Gwynedd and Ynys Môn: Overall, Wales experienced nearly 50% decline in fishermen in 3 years to 2000 partly due to competition from EU partners. Further declines were recorded in 2006 with a slight rise in part-timers. Without a detailed survey the current situation within the study area is unclear with mixed views according to area – particularly Gwynedd, while Ynys Môn appeared more positive with new recruits joining the association. However, a general Wales wide decline in fishermen weakens the opportunities for developing regular supplies of whitefish from Wales to UK markets or indeed establishing finfish processing based on the capture fisheries. Even without the further declines in fish landings, existing catches of more popular fish species such as cod, haddock and pollock, plaice and sole would barely impact on the current UK market. Species like Megrim which account for 25% of total Welsh catch together with rays and skate have a limited market in the UK (Levercliff, 2008).

Landings of fish and shellfish into Wales were almost 13,000 tonnes in 2009, worth £16.6m at first sale. The vast majority of this was of shellfish. In order of economic importance the leading species were scallops, whelks, lobsters, megrim, monkfish and crab, all having over £1m worth of landings. The whitefish species are caught largely outside Welsh waters by UK registered but foreign-owned trawlers landing into Milford Haven. Direct employment in fishing was 851, just over half of whom are part-time (source MMO).

Under the EFF: Axis 4 scheme supporting coastal communities associated with inshore fishing is important since unlike offshore fishermen (often foreign owned vessels), those involved in the inshore fisheries are less likely to move away from the immediate study area or land catches at another port. Overall, Wales contributes just 2% (9579 tonnes) to the annual UK landings of fish and shellfish with nearly 80% comprising shellfish (Fig.1). This bias towards shellfish is especially true for Gwynedd and Ynys Môn where finfish landings may be intermittent, of variable quality and quantity and often of species with low UK market demand. Even at Milford Haven, the largest Wales fishing port, finfish landings are quite insignificant.

Shellfish accounts for 77% of all landings into Wales (Fig.1.) of which 3354 tonnes are whelks – for which there is no UK market and the main processor in Gwynedd has ceased trading. Holyhead is still recognised as the main fish landing port in N Wales and may be used as a representative guide to the general status of the study area capture fishery. Total finfish and shellfish landings were 219 and 35 tonnes respectively in 1998 (MAFF Statistical tables -1999). Just a few years later in 2003 and 2006 the downward trend of finfish landings at Holyhead is clear (Table 1). By 2010 and 2011 shellfish landings (largely scallops) totally dominate the sector with finfish being largely absent. Shellfish landings approached 2.5 thousand tonnes valued at nearly £1.5m (MMO 2010; 2011).

Fig.1. The 2007 dominance of shellfish landings over finfish in Wales (Levercliff, 2008)

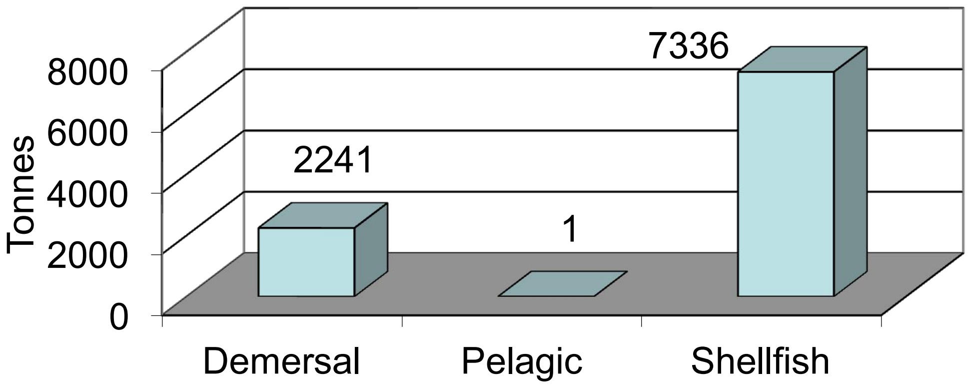


Table 1. Weight and value of demersal and pelagic finfish species and shellfish landed into the 3 main Welsh ports.

Port	Milford Haven		Holyhead		Bangor		Wales total	
	Weight	Value	Weight	Value	Weight	Value	Weight	Value
Species	**Tonne**	**£'000**	**Tonne**	**£'000**	**Tonne**	**£'000**	**Tonne**	**£'000**
Demersal								
2003	1,753	3,144	414	531	-	-	2,302	
2006	1,737	3,653	190	270			3,956	
Pelagic								
2003	14	10	-	-	-	-	14	
2006	4	2					10	
Shellfish								
2003	471	900	2,939	1,456	5,129	193	6,796	6,771
2006	597	1,843	2,617	1,901				
Total								
2003	2,238	4,053	3,353	1,987			9,112	
2006	2,338	5,498	2,807	2,170	5,129	193	10,737	

3.0 COMMUNITY AND STAKEHOLDER ENGAGEMENT

3.1 Consultation

In order to develop the strategy a full consultation exercise was undertaken which endeavoured to engage with as many of the stakeholders as possible. This process has a primary and secondary aim. Firstly it ensured that their opinions, knowledge and expertise served to develop the strategy and the ongoing implementation of the programme. Secondly it raised their awareness of the FLAG and will facilitate future discussions regarding specific implementation projects.

As the FLAG has decided to involve the wider costal community the consultation exercise has engaged with a wide selection of potential stakeholders. These have included representatives from the hospitality, wholesale, fishing and tourism sector. Over 30 individual meeting were undertaken with individual and groups over a four week period across both local authorities. Overall the response was positive, however the willingness to engage was often determined by their interest in the fishing sector and the perceived relevance to their business or organisation. The consultees are listed below.

Andrew Godber	National Trust	Gwynedd
Paul Roberts	Food Technology Centre	Anglesey
Cath Rigby	Llyn Aquaculture	Gwynedd
Steve Harrison	Aberdaron Seafood	Gwynedd
David Livingstone	Cemaes Bay Lobster and Crabs	Anglesey
Hilary Murphy	Ty'n Rhos Hotel	Gwynedd
Neil Rowlands	Treysgawen Hotel	Anglesey
Chris Chown	Plas Bodegroes Hotel	Gwynedd
Steffan Coupe	The Lobster Pot	Anglesey
Nia Doyle	Harry's Restaurant	Anglesey
David Robertson	The Bull Hotel	Anglesey
Peter Toft	Trearddur Bay Hotel	Anglesey
	Portmeirion	Gwynedd
Shaun Davies	The Ship Inn	Anglesey
Roger Gorman	The White Eagle	Anglesey
Gareth Hind	Waitrose	Anglesey
Stephen Williams	Pysgod Llyn	Gwynedd
Jonathon Ellis Williams	Glasfryn Farm Shop	Gwynedd
Gill Reacord	Gill's Place	Gwynedd
James Hooton	Hooton's Homegrown	Anglesey and Gwynedd
David McCreadie	Deri Môn	Anglesey
Richard Dyer	Holy Island Seafood	Anglesey
Brian Thomas	Moo Baa Oinc Restaurant and Farm Shop	Anglesey
Linda Williams	Plas Menai	Gwynedd
Ian Hughes	South Quay Shellfish	Gwynedd
Richard Williams	Bay Seafoods	Anglesey
Shaun Mitchell	Pwllheli Seafood	Gwynedd
Richard Dyer	North Wales Fishermen's Co-	Anglesey

	operative Limited	
Shaun Krijnen	Menai Oysters	Anglesey
Sion Williams	Llŷn Pot Fishermens' Association	Gwynedd
Rowland Sharp	CCW Marine Fisheries Advisor	Anglesey & Gwynedd
Colin Charman	CCW Marine Conservation Officer - Menai Strait & Anglesey)	Anglesey & Gwynedd
Lucy Kay	CCW	Anglesey & Gwynedd
Tim Croucher	WG Fisheries Officer	Anglesey
Alwen Eidda	Menter a Business	Gwynedd & Anglesey

3.1.1 **Summary of the consultation responses:** For the benefits of this document an overview has been provided below of the findings of the consultation process. This has been divided into four categories which are the hospitality sector, the retail, wholesale sector, and the fishing sector. These have also been fed into the SWOT analysis and full responses to the consultation process has been provided in appendix 1.

Sector	Stakeholder Perceptions / Comments	Opportunities
Hospitality	Almost without exception all hotels and restaurants stated that they were **eager to source more locally caught fish and shellfish**. Many of the barriers to doing so included a lack of information regarding where to source local fish and also very little knowledge of local licensed fisherman. Many of them had been approached directly by fisherman however this was on an **ad hoc basis** and was impossible to rely on and prepare for. The majority of those questioned were willing to develop their menu to offer local fish if they could **access a reliable source**. A few of the comments also made reference to the "**unprofessional"** manner in which some of the fisherman conducted their business i.e. unwilling to invoice and expecting cash on delivery. This was not always possible for some of the larger hotels and restaurants. When asked how they would like the fish prepared the majority stated that they would **prefer them scaled, gutted and filleted** . This was because much of the fish currently purchased by hotels and restaurants came prepared and therefore they would expect locally sourced produce to meet the same standards Many of the establishments made reference to the **customers lack of knowledge** which often meant that they were reluctant to order anything beyond salmon, trout or cod.	Over half of those restaurants and hotels questioned believed that a **central local buying facility** where produce could be graded, processed and distributed would be extremely useful. Several also suggested that the facility could also be **linked to a website** which could list the daily catch along with the prices. The general consensus was that the best location for such a facility would be in the Caernarfon / Bangor area rather than North Anglesey or South Gwynedd. To counteract the customers lack of knowledge many establishments suggested that an **awareness raising campaign** was needed to encourage people to eat more fish, and also different types of fish rather than salmon, trout or cod.

Wholesale	The vast majority of fish is currently sold mostly to fish markets on the east coast or directly to France or Spain. **The lack of a local processing and distribution facility** makes it difficult to serve the local market. One of the wholesalers questions was eager to expand however he had identified London as the main target rather than North Wales. Although many of the wholesaler state that they supply local hotels and restaurants in reality they admit that it is difficult to do so – **selling abroad is easier**. They admit that the mechanism for **selling locally is fragmented** and requires investment to develop the supply chain. One wholesaler, who exported to Spain on a daily basis, believed that the local market was insignificant and was “not worth bothering with”. He believed that the demand was inconsistent and that the **payment terms (30 – 90 days)** was far less attractive than their current arrangement. There is a perception among the wholesalers that working with the local **fishing industry is challenging** as it is difficult to get agreement between the various fishing associations. This has a knock on effect on the ability to develop and service a local market.	All the wholesalers believed that a central processing and distribution facility would, in theory, benefit the local fishing industry. However they were also very aware of the **historical differences / disagreements** could hinder the development and running of such a facility. Many made the comparison between the marketing campaign for Welsh beef and lamb, and Welsh seafood. They identified a lack of consumer awareness and were eager to see similar investment into a **Welsh seafood marketing campaign** as for other Welsh produce.
Retail	The retailers consulted ranged from specialist fishmongers selling 100% locally caught fish to farms shops that did not currently sell fish. The opinions were therefore not equally informed. The specialist fishmongers believed that the **demand existed and people were becoming more interested** in locally caught fish. One stated that the interest was greater among visitors and many asked about provenance. The support from local residents was often disappointing.	The **lack of processing and distribution facilities** was again highlighted by all those consulted. The specialist retailers also highlighted the need for **better infrastructure** to enable fisherman to sell locally e.g. ice production, polystyrene boxes, and preparation facilities. Without these fisherman will continue go for the easier option of selling abroad.

	The fishmongers had a good relationship with a select number of fisherman but did voice frustration at those that exported all their catch abroad rather than work towards developing the local market. Retailers that were not currently selling local fish (but could potentially do so in the future) gave a mixed response to the idea. Some would be willing **to pilot local fish if it was convenien**t, while others were very aware of the lack of cooperation within the industry and had no interest in getting involved. Many were aware of the **failed Llyn Sustainable Fisheries project at Cwrt Farm** and believed it demonstrated the lack of cohesion and partnership. The largest retailer consulted was **Waitrose** in Menai Bridge that does sell more local produce than any other of its outlet in the UK. They made reference to their requirement for the fish to be graded as all local fish is currently sent to Grimsby for this purpose.	Specialist retailers also believed that the demand existed for **local seafood in restaurants**. Tourists often asked where they could eat seafood locally, only to be told that the options were very limited or non existent. A suggestion was also made that the Food Technology Centre should work with the industry to add value to local seafood.
Fisherman	Discussions were held with representatives of all 3 associations within the study area. Their interest and knowledge is significant and therefore discussions were in depth. These are expanded on as part of the SWOT analysis and fully transcribed in appendix 1 with only a summary of the main issues detailed in this section. When questioned about future hopes for the sector the responses varied significantly. The single most critical concern common to the whole study area was **fishery management**. This issue was considered to be the major obstacle to securing improved market prices for produce, promote conservation and sustainable fishing, expand processing, diversify landings or integrate with other local sectors.	All 3 associations were supportive of the **lobster "v" notching scheme** but believed it would work without funding and coordination. **Improve local infrastructure** to enable fisherman to service local demand. This would ideally involve developing local infrastructure, processing facilities and distribution network.

	There was significant despondency about their ability to secure financial support from different EU programmes such as EFF. The **failure of the Llyn Sustainable Fisheries project** had contributed to this. This failure was seen as partly down to the **lack of cooperation and coordination** between the associations, however nobody was willing to take any blame for the situation. While many supported the concept of a central processing facility they questioned if it could work given the fractured relationships in the industry. There was a concern that the area was overfished with few large animals being caught. The situation is believed to be made worse by the **"tourist potters**" who are allowed to fish up to three pots a day. Many fisherman were also concerned about the new **Marine Protected Area** which could have a significant impact on fishing. Some will see their "patch" be reduced 50%.	
Conservation	Discussions were held with the Countryside Council for Wales where they explained there role in maritime conservation. This included assessing the likely environmental impact of projects on behalf af the Welsh Government. It was suggested that a similar arrangement could be made with the FLAG whereby they would assess projects prior to final approval. There was a discussion regarding the various projects that could complement (or possible duplicate) the FLAG activities, which included educational projects. A comprehensive list of contacts was provided in order to collect information on all relevant information.	Involve CCW in the **project assessment process** to minimise the environmental impact of the FLAGs activities. Establish links with key projects and personnel in order to ensure activities complement each other, rather than duplicate. Much of this activity will be taken by the appointed officer rather than at a strategic level. Undertake **research into the facilities / equipment** within the fishing industry which could be potentially accessed in order to undertake research. There would also be opportunities

	The principle of encouraging cooperation between fishermen and research / educational projects was discussed. There was a general agreement that this would be worth pursuing however specific opportunities were not identified.	**capacity building** among fishermen (and associated employees) to undertake reseach.

3.2 SWOT Analysis

The following SWOT has been completed using information provided through the consultation process as well as secondary information from relevant reports.

Strengths

- Study area encompasses almost 100% of farmed seafood production in Wales with the UK's largest mussel fishery.
- Ynys Môn has the only commercial land based marine RAS fish farm operating in Europe.
- Significant potential for expansion and diversification of RAS fish farm production which would enable full time processing to be developed within the study area.
- With appropriate private investment, there is potential for Ynys Môn marine finfish production to expand and supply a significant share of the UK retail market for sea bass and other high value species.
- The inshore capture fisheries sector is considered as largely sustainable due to its size and catching methods
- Crustacean shellfish species landed are considered high quality demanding premium price
- Study area secures significant EU Framework funding for fisheries and aquaculture research – probably the highest of any region in Wales and England.
- Strong demand for certain species harvested or cultured in Wales from the UK and the continent
- A proportion of the fishermen throughout the study area are proactive and keen to embrace new technologies and lead their sector.
- The study area is extremely well positioned to maximise future investment in commercial support for coastal fisheries from the forthcoming European Marine Fisheries Fund 2014 – 2020.
- Strong demand by hotel and restaurants to source additional locally caught/farmed fish and shellfish
- Fisherman are well equipped and have extensive knowledge of the marine environment.

Weaknesses

- Weak economies of scale in relation to other countries. This refers to both capture and culture sectors with exception of mussels.
- Poor, expensive and unreliable distribution services, a fragmented commercial structure and little value added / processing facilities
- Low finfish production volumes and quality by capture fishery and lack of demand in the UK for most finfish species landed
- Lack of awareness amongst customers of quality seafood available locally.
- Restaurants and hotels unsure how to source local seafood (absence of central supplier)
- Problem of irregular seafood supply noted by R & H which require gutted, scaled & filleted products (only possible from farmed produce)
- Sensitivity to over exploitation of key species
- No category A waters which inhibits expansion of live shellfish sales in UK without adequate prior investment in depuration of shellfish
- Sometimes poor relationship between fishing associations and policy makers
- Fishery management described as “Non – existent” leading to lack of policing of fisheries and potential for over-exploitation.
- Unrestricted access by foreign vessels.
- No monitoring of tourism or diving sector activities involved in capture of high value species.
- No enforcement of maximum pot number allowable by tourist sector.
- Excessive fishing intensity by some fishermen – no maximum allowable number of pots.

Opportunities

- Greater participation in EU R&D programmes would enable Association representatives to visit and view fishery organisations in other countries to learn and better understand issues such as MPAs and improving fishery management.
- Some existing wholesalers already have the intention of expanding sales of seafood products locally and further afield.
- Restaurant trade appears keen to purchase local seafood pending secure supplies of processed product.
- Opportunity to raise awareness of seafood from Wales and market environmental quality and sustainable production methods
- Potential to supply live and fresh seafood to consumer within 24 hours of harvest
- Secure premium prices for seafood from sustainable sources
- Potential for enhancing value of current production – both farmed and capture with appropriate investment in technology and marketing.
- Regional sourcing by major retailers and foodservice operators
- Potential to improve prices of capture fishery by accessing main markets directly
- Potential to utilise fishing equipment and knowledge of the marine environment within fishing community to support research and environmental education projects.
- Capture sector in study area is best positioned in Wales to integrate with farming sector if there is mutual willingness for cooperation between the 2 sectors.
- Expose capture fishery sector to case studies of successful MPAs supported by fishermen.
- Improve interaction and understanding between policy makers and fishermen.
- Marketing the sustainability image of some species could be vastly improved if arguments for specific fishery management tools are implemented on a cooperative basis with the fisheries sector rather than forced upon them.
- MPAs must be effectively managed to ensure any long term sustainability benefits accrue to fishermen and environment and not casual tourism sector and foreign vessels.
- Opportunities to target EU funds. Significant notice should be applied to new EU proposals submitted by the European Commission which has proposed a new fund for the EU's maritime and fisheries policies for the period 2014-2020, called the European Maritime and Fisheries Fund (EMFF). The EMFF will replace the existing European Fisheries Fund (EFF) and a number of other instruments. The proposed envelope amounts to €6.5bn for 2014-2020. "*This new fund will increase*

economic growth and create jobs in the sector. No more money will be spent to build big vessels. Small scale fisheries and aquaculture will benefit of this budgetary greening of the Common Fisheries Policy." (Maria Damanaki, Commissioner for Maritime Affairs and Fisheries, 2012). The Commission says that the EMFF will be a fundamental instrument for the reform of the Common Fisheries Policy. The fund will give fishermen the incentive they need to use sustainable fishing methods, so that fishing can be less damaging to marine ecosystems, overexploitation can be stopped and the decline of fish stocks can be reversed.

- Integrating capture fisheries with strategic tourism sectors and expertise from the commercial aquaculture sector could enable diversification of high value fisheries, improve PR for sustainable seafood production, support security for inshore fisheries and improve fishery management. This could lead into opportunities for encouraging new businesses for high value species. This approach could enhance local school and university education while also educating tourists, local hoteliers and restaurants within the study area and particularly national policy makers. Equally importantly, this approach could generate very significant support funds for future diversification of fishing communities from the forthcoming EMFF 2014 – 2020 and generate further European and international links with fishery sectors.

Threats

- Failure to meet discharge consents by fish farms or seafood processing plants
- Adverse press from anti-aquaculture lobbyists.
- Inappropriate behaviour by either fishery or culture sector that supports extreme negative views.
- Failure to manage the capture fishery in a sustainable manner
- Failure to provide resources for improving management of coastal fisheries
- Failure to meet demands for product traceability, quality assurance and consistency of supply
- Competition with cheap imports - the study area needs to focus on high value niche products
- Declining number of fulltime fishermen in Wales
- Inadequate management of MPAs results in zero economic or environmental gain
- MPAs may temporally reduce economic viability of fishing grounds critical to local fishermen.
- Inadequate interim support for fishermen impacted by MPAs.
- Periodic closure of shellfish waters due to toxic algal blooms which are occurring more frequently in some EU regions
- Increase sewage or agricultural effluent contamination of coastal water
- Weak fishery management – particularly of high value species such as lobster, crab and sea bass.
- Unregulated capture and sale of illegal sea bass by tourists and anglers undermine efforts to develop local sustainable trade while undermining angling tourism
- Lack of knowledge by local hotels and restaurants creates market for illegal seafood supplies
- Failure to implement fishery management tools with full cooperation of fishery sector.
- Disenfranchisement of fishermen
- Poor communication between regulators and producers
- Increasing, unregulated tourism pressure on limited stocks of high value species
- Continuation of over-landing high value shellfish to east coast processors or export to France, Spain and Italy.
- Restaurant trade has difficulties in identifying reliable sources fish & shellfish, difficulties in dealing with fishermen.

3.3 Analysis of the SWOT

A detailed analysis of the information provided in the SWOT has been provided below. The LEADER approach adopted by the FLAG will seek to engage with stakeholders to encourage a bottom up approach. However we also recognise the influence of wider fishing industry and have included an overview of the state of the world fisheries in appendix 2.

3.3.1 Fishery Management: Discussions with all 3 associations within the study area indicated a range of emotions from high enthusiasm to abject despair when questioned about their future hopes for the sector. The single most critical concern common to the whole study area was the extremely weak to absent fishery management. This issue was considered to be the major problem in any future attempts to enhance the sector to secure improved market prices for produce, promote conservation and sustainable fishing, expand processing, diversify landings or integrate with other local sectors. There was significant despondency about their ability to secure financial support from different EU programmes such as EFF.

Just one management tool was emphasised as having been extremely effective by all 3 associations. This was the lobster 'V' notching scheme funded by the EU via WAG. This scheme was believed to have had a very positive impact on the fishery, improving landings and size of the lobsters landed. 'V' notching schemes promote improved recruitment of juveniles by enhanced protection of berried female lobsters. However, the main weakness of this scheme is that it is entirely dependent on EU funding which is both limited and intermittent. Therefore, any benefits to the fishery are short term in duration. It would appear that self-policing of the fishery is strong.

Although communication between the different associations does take place, it is perceived as non-structured and sometimes fractious (Franklin, 2010). This unfortunately remains true within Gwynedd and while attempts to force closer union and cooperation between different fishery associations have been made it is perhaps more constructive to accept this situation rather than make cooperation a condition of funding.

3.3.2 Fishing techniques: Fishing techniques in the study area involve a range of pots for lobsters and edible crab, whelks, and gill nets for a variety of fish species including bream, sea bass and mullet. Pollock, coalfish, mackerel and cod are taken by trawl and trolling lures. Other high value fish species included brill, turbot, sole and plaice taken in only small amounts by bottom trawl.

Lobster and crab fishing remains the mainstay of the study area with vessels fishing strings of 10 - 30 pots worked from a few metres to 4 miles offshore. Some fishermen manage in excess of 1000 pots. Male edible crabs are taken during the spring followed by significant numbers of females later in the season. The spider crab occurs in large numbers in the area although there is no precise data on the size of the fishery. This species has been taken with pots and tangle nets. Similar to the remainder of Europe the crawfish fishery has been practically eradicated with only a few animals being landed each season.

3.3.3 Status of main target species*:* While there were insufficient resources for a detailed meeting with all fishermen the association representatives indicated that lobster stocks were likely overfished. Mean size of lobsters landed is very close to the minimum legal size with few large animals being caught. There is also concern about pressure from significant numbers of tourist potters who are allowed to fish up to 3 pots per day. Tourist observance of size limits is believed to be poor. Some divers also continue to exploit lobsters with some evidence that thieving directly from fishermen's pots continues. Furthermore, 2 of the associations reported that fishing effort by full time fishermen had increased to try and maintain incomes in face of reduced prices secured for the product while operating costs escalate.

The barrier to maximising benefits from landings of small volumes of high quality finfish (and crustacea) remains unchanged to the situation reported more than a decade ago (Fletcher, 1996). During the Objective I and EFF schemes only limited improvements to local fishing infrastructure designed to improve operations, safety and marketing capability has been secured. Some critical infrastructure improvements identified during the 1996 study remain largely absent while the need in 2012 is now even greater. One Gwynedd fishing association reported that they had presented detailed plans for EFF funding for a small processing plant to supply high value sea bass products to local retail outlets. This approach was unsuccessful and the view was that the project was now irretrievable.

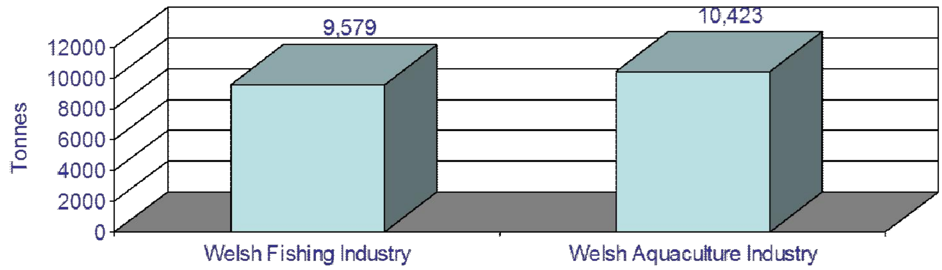
2011 - 2012 brown crab prices range between £1.20 – 1.50/kg, occasionally achieving just £1.00 / kg. Chinese restaurants in Manchester will pay £5.90/kg for red crab. The local price trend for lobster sold to intermediaries is declining with winter prices of £13.50/kg declining to £8.50/kg in the summer. Seasonal highs of £18.00/kg are secured during Christmas period. Comparing 2012 lobster invoice values (£12.50/kg) with those secured in 1994 for the same quantity of lobsters (£17.50/kg) demonstrates declining price trends while operational and fuel costs spiral upwards. In 1994 it was estimated that the annual value of the Llŷn fishery alone lay between £613 – 700K with some £200K being spent locally to support the fishing operations. In light of the documented national decline in value of the lobster fishery in Wales which are supported locally within the study area it is likely that the economic relevance of the industry to the study area could be in decline.

3.3.4 Marine Protected Areas: Franklin (2010) noted that industry relations between the capture sector and conservation bodies were not always harmonious despite some successes. In particular, the industry in Gwynedd and Ynys Môn still has fears over the potential curtailment of its fishing activities in relation to the implementation of Marine Protected Areas (MPAs). These are currently being considered in the study area and the negative view of coastal fishermen is unfortunate. This may reflect the manner in which the MPAs have been presented or the experience of fishermen in relation to the management of the "closed box" area for scallops in Cardigan Bay. MPAs have proved to be extremely effective in some of the poorest fishing regions of Asia, S America and in Europe. In many instances they have been so successful that fishing communities have undertaken the task of implementing additional voluntary MPAs and organised their effective management.

In the UK, Scotland's first No Take Zone implemented in the Clyde in 2010 show that juvenile scallops are now more abundant inside the No Take Zone in areas of healthy seabed habitat compared to outside of the protected area. The greater abundance of juveniles was due to the enhanced presence of macroalgae and maerl within the reserve boundaries. This complex habitat appeared to have positively encouraged spat settlement. Studies in other marine areas around the world have shown that a healthy scallop population within protected areas will seed and regenerate scallop stocks more widely throughout surrounding coastal waters, providing tangible benefits for commercial fishermen. In the waters around the Isle of Man, the creation of closed areas since 1989 has reinstated a struggling scallop fishery into a healthy, more productive marine environment, both supported and self-policed by the fishermen who benefit. Critical in MPA success is properly financed Government management of the MPA.

3.3.5 Aquaculture:

Fig.2. Relative production importance of capture fishery and aquaculture in Wales



Based on 2006 figures (Fig. 2) aquaculture accounts for 52% of the total Welsh fisheries output. However, farmed production has increased by another 500-700 tonnes with the additional output from Anglesey Aquaculture Ltd (AAL) (formerly Selonda UK). As the majority of Welsh aquaculture is located in the study area it is by far the most valuable both in terms of volume and value. Levercliff (2008) reported that the proposed production of 1000 tonne per annum at Anglesey Aquaculture Ltd (formerly Selonda UK) represented some 70% of the UK market demand for sea bass. This statement is a gross underestimate of the potential for expansion of bass production in Wales since the UK sea bass market is significantly higher at around 18 thousand tonnes pa – which is mostly supplied by inferior product imported from the Mediterranean. The local capture fisheries cannot legally substitute these imports since UK demand is largely in the (legally undersize) portion / 120g fillet markets.

The potential for expansion of sea bass (and other farmed fish species) production in Wales for the UK market remains highly favourable provided appropriate investors can be identified. As a result of the investment in land based fish farming in Anglesey very significant research investment (>€4.5m) into Wales has been secured from EU Fishery Framework programmes providing support for SMEs and highly paid technical jobs at research institutes.

In 2005, shellfish cultivation, predominantly mussels in the study area, was valued at circa £12 million. There were 12 registered shellfish farm sites operated by 11 businesses, employing 43 full time and 13 part time employees. This includes oysters but Welsh mussel production in the Menai Strait is by far the highest volume / value fishery in the study area accounting for 37% of total UK mussel production in 2006 with up to 10,000 tonnes annual production. It is considered to be one of the most environmentally benign fisheries in operation. However, production is susceptible to the vagaries of juvenile spat fall which have to be harvested from offshore areas before relaying in the Straits, conflicts with coastal developers and low quality inshore waters.

Proposed new marina developments in the Straits have deterred overseas inward investment into the mussel fishery which would have secured upwards of 150 permanent jobs locally with a range of technical skills involved in large scale mussel processing and packing. Uncertainties with the status of long term Fishery Orders have also impacted production of some local shellfish producers.

3.3.6 **Local Distribution:** The fishing associations were adamant that increasing local sales to the restaurant trade will be difficult without a centralised outlet capable of guaranteeing supplies. Restaurants and hotels would prefer prepared fish i.e. scaled, gutted and filleted by a central facility where grading, preparation and packing for distribution could be arranged. The facility would ideally contact local buyers with details of day's catch and prices. A mobile distribution facility might be considered or a centralised outlet in Bangor or Caernarfon. Some felt that a business orientated individual rather than a local fisherman should manage such an enterprise and some restaurants indicated that they would promote sales of fish dishes if locally sourced products could be assured.

3.3.7 **Local seafood in restaurants**: The availability of local seafood in hotels and restaurants in inconsistent and unreliable. The proprietors and chefs stated that they were eager to source local finfish and shellfish however it was often far easier to purchase from a wholesaler such and as M&J Seafoods. The main advantage being that the fish came prepared, the supply was reliable and the administration was also in place. When they did purchase from local fishermen the fish was not prepared (i.e. gutted and scaled) to their desired standard and the payment was expected in cash on delivery.

However it is also worth noting that a minority of restaurants did source local seafood and believed there was a significant demand from tourists which was currently unmet. These were often specialist seafood restaurants e.g. the lobster pot on Anglesey, who invested a great deal of time and resources in developing their relationship with the local fishing industry.

In conclusion it would appear that there is a demand for local fish where it is made available and where the restaurant recognises it's value. The majority of restaurants however do not have the resources (or choose not to allocate the resources) to source local fish given the current fractured distribution infrastructure. The majority stated that they would source more local fish if it was easier to do so. One fisherman made the salient point that restaurants would increase the availability of local seafood on the menu if there was a clear demand from the customer – regardless of the distribution issues.

3.3.8 **Retail:** Fishmongers in Anglesey and Gwynedd sourced local fish which was complemented by fish from abroad. Many had an established relationship with fisherman developed over many years which seemed to work, however most made reference to the fractious relationship within the industry which had detrimental impact. Some voiced frustration at the amount of local fish being exported however also recognised that the lack of infrastructure for dry ice, polystyrene boxes and processing made it an easier option.

Other potential retail outlets, e.g. farm shops, believed that the demand existed for local fish however the limited distribution infrastructure made it difficult to source. One of the largest farm shops in Gwynedd again made reference to disagreements within the industry and for this reason was unwilling to consider selling local fish. The failed Llyn Sustainable Fisheries project had also served to highlight the poor level of cooperation among fishermen.

Two potential actions were highlighted by the retail sector. These were the establishment of a central processing facility in North Gwynedd , e.g. Caernarfon or Gwynedd. This would make it easier for a wider range of retail outlets beyond the specialist fishmongers to source local fish. Secondly the fishmongers highlighted the need to increase awareness among the public of seafood. This included developing their understanding of seafood and how it should be prepared, as well as the local fishing industry in general.

3.3.9 Tourism: All contributors to the consultation process recognised that local seafood had a role to play within tourism. Restaurants and retailers believed it's availability strengthened the sense of place and could add value to the experience of visiting the region. Given that the region was very closely associated with the sea many tourists were often surprised at the lack of availability, and it therefore detracted from the visitor experience. This was in stark contrast to the prominence to Welsh Beef and Lamb which is often referred to on menu and shop windows.

Secondly many believed opportunities existed for food tourism which would allow the visitor to gain first hand experience of local food. This could include providing opportunities to go accompany local fisherman on their trips, providing cooking demonstration at suitable venues or events, and arranging events such as the Pembrokeshire Fish Week.

The opportunity to add value to the visitor experience and strengthen the link between the region and the fishing industry has real potential. However it would appear that there is a need to improve basic infrastructure and availability before resources are invested in raising visitor expectations. It could be argued that there is little to be gained from telling visitors about local seafood unless it is more widely available.

4.0 SUMMARY OF THE MAIN ISSUES AND OVERALL OBJECTIVE

4.1 Main Issues and primary objectives

To improve the value of coastal fisheries and seafood products while enhancing the economic benefits to coastal communities in the study area it is critical to think long-term i.e. develop projects which have real potential for promoting eventual self-sufficiency of fishermen and the associated communities without continued dependency on Government support and EU grants to improve fishery management.

Equally, projects should be self-generating; creating new opportunities within the study area based on sustainable exploitation of local marine resources and associated sectors like tourism. Such projects may take time to develop their full capacity but potential for long term financial viability supporting full time employment should be the critical target element in all future investments. The most critical long term objective of the FLAG programme should be to ensure some form of permanent and sustainable long term plan to enable the fishing associations and fishing communities to financially improve self-management of their own fisheries. This in turn should have benefits for the wider coastal community.

This section summarises the main issues identified through the process of consultation and analysis along with the proposed measures.

Main Issues	Response	Relevant Themes
Unreliable Finfish Supply: There is potential to exploit some high value finfish species in the study area such as sea bass provided catching methods are sustainable, controlled and coordinated to meet the identified local market demand. Anglesey fishermen are currently investigating opportunities to improve the supply of finfish to support local fish supplies for direct sales to the market. Restaurants are also eager source a consistent supply of finfish. The study area also contains practically the entire Welsh aquaculture industry and as such should present opportunities for both sectors to evaluate areas for mutual collaboration and benefit. In a review of the implementation success of the Wales Fishery Strategy, Franklin (2010) reported that creating Fish Hubs gave significantly improved marketing and value adding potential for the large numbers of widely dispersed, small scale operators in the sector.	**Support limited, small scale fish processing** where registered fishermen can demonstrate sustainability of catch, continuity of supply, possible integration with farming sector and diversity of produce. This action could also be complemented by the establishment of a local Fish Hub in order to strengthen links with the aquaculture industry and support more consistent supply.	**New Markets and Products**: Activities would be focused on developing a more consistent product which would be more attractive to the local catering, retail and wholesale sectors. **Coastal Community Capacity**: Success would depend on the ability to engage with the wider community and raised awareness of the benefits enforcing minimum catch sizes etc. **Progressive Coastal Economy**: Fish hubs would encourage collaboration between fish farms and traditional fishermen in order to access new markets.
Low Shellfish Value: It is estimated that over 95% of landed lobster and crab fails to secure current market prices. All three fishing associations voiced their frustration and believed it was due to the following factors: • fragmented marketing • restricted outlets • dependency on local intermediaries for sales • lack of infrastructure and equipment to reach more lucrative markets on a consistent basis. For instance, lobster landings for the whole of Wales have remained static	**Enable the development of live fish holding facilities** and vivier transport equipment in strategic areas where landings are sufficient to warrant investment. This would give fishermen greater flexibility and control over the supply of their catch. This would in turn result in increased value for their	**New Markets and Products**: Access to live fish holding facilities would provide fishermen with greater flexibility and reduce their dependency on intermediaries. This is in turn would enable fishermen to access new markets and increase income.

since 2006 while the officially recorded sale value to the economy has declined by nearly 40%. This is despite the fact that the international market demand for lobster is showing significant growth and shows little sign of slowing. China trebled demand for lobster imports between 2002 and 2006 while market forecasts by 2014 clearly demonstrate that demand is expected to easily outstrip fishery supply. This data would suggest that the value and availability of lobster will be opposed since, unlike other marine species, farmed lobster supplies remain very limited. However, it does underline why local fisheries in the study area need to establish direct sales to key UK markets – particularly the Asian sector in major cities.	produce.	
Fisheries Management: The associations were unanimous in their support for improved management of inshore fisheries and considered it to be a key element of any project to support fishing communities. This is particularly so for lobster and crab fisheries which form the mainstay of fishing communities in the study area and are considered to be under significant pressure from over fishing, weak management and tourism. Unfortunately, the potential positive synergies between fisheries and tourism have not been exploited. With appropriate support the fishing industry could better integrate with the tourist trade rather than view it as a competitor. It should be possible to secure financial income from tourism to improve fishery management and long term conservation objectives. Improved management will also require cooperation between relevant conservation bodies and the fishing community. If done effectively this will lead to better understanding between the groups and should facilitate improved fisheries management.	**Support projects designed to integrate conservation with the tourist sector**. As well as raising awareness and understanding, there is also an opportunity to raise income to support better management such as "V" notching which had the full support of the fishing associations. **Involving fishermen in research and environmental projects** where practicable could provide an additional source of income and improve cooperation between the fishing and conservation sectors.	**Revitalising Communities:** Activities could be include supporting new tourism businesses integrating conservation and the fishing industry. **Coastal Community Capacity:** Activities could provide opportunities for capacity building within the fishing industry which would facilitate their involvement in research and environmental education projects.

Integration between sectors: Improving integration between the tourism, fishery and aquaculture sectors could present new opportunities for inshore fishermen to diversify and improve income sources through direct sales. Strategically targeted fresh seafood outlets could be just one option. Integrating supplies from capture and culture at least guarantees supplies from the farming sector which currently could supply 3 high value species in fresh and processed forms.	**Support the establishment of new ventures focussing on direct sales of seafood** products from both capture and farmed sectors direct to the public with a focus on tourism.	**New Markets and Products:** Activities would aim to strengthen links between various sectors in order to strengthen existing markets or open new ones.
Availability of local seafood in restaurants: The seafood restaurant trade in the study area clearly indicated that there was a demand for more consistent supplies of local seafood produce. However, they were often unaware that this was due to the absence of reliable landings at local ports rather than a reluctance on behalf of local fishermen to supply. It is also important to emphasise that the local restaurant demand is likely to be very seasonal – an issue noted by one fishermen planning to increase landings of finfish .	**Support initiatives aimed at developing local restaurants awareness of local fish and facilitate sourcing.** Efforts would complement other FLAG activities aimed improving supply of finfish and shellfish.	**Coastal Community Capacity:** Activities would involve educating the restaurant trade as to the availability of local seafood and reducing the barriers to sourcing local seafood. There would also be an element of training and awareness raising among chefs in the region. **Progressive Coastal Economy:** With a more consistent supply of local finfish and shellfish there will be opportunities to open new businesses selling and processing seafood.

4.2 Global Objective

The challenges within the fishing industry in Anglesey and Gwynedd are significant and have been influenced by a range of local, regional and global factors. It has historically played an important role in the local economy and has also defined many towns and villages along our shores. However it has seen it's role diminish over recent decades, and it's status and profile has also suffered.

The region does however possess all the natural resources to rebuild the industry and establish stronger links with the wider coastal community. There are plenty of fish in our clean coastal waters, as well as skilled and experienced fisherman to catch them. The FLAG can engage with the stakeholders, identify the issues and undertake actions that will lead to sustainable and long term change.

The aim of the "Global Objective" is to set out what the Gwynedd and Anglesey FLAG aims to achieve, however a more detailed breakdown of specific objectives is provided in section 5.0.

The Global Objective for the Anglesey and Gwynedd FLAG is

"By 2015, to strengthen the innovation and adaptability in businesses within the FLAG area, through actions leading to the development of new processes or products, new markets accessed, individuals successfully gaining and implementing new skills and new jobs being created or safeguarded."

4.3 Consistency and synergies with other policies and programmes

Coherence with National and Regional Policy Context		
Policy / Strategy	**Key Provisions**	**Reflection in Gwynedd and Anglesey FLAG Actions**
Wales Fisheries Strategy	**Environment**: fisheries developed and managed in a sustainable way, contributing to the environmental policies of Wales **Healthy Fish Stocks**: development and management of fisheries at sustainable levels **Positive community role:** recognition of fisheries as a positive contribution to the communities of Wales	Support projects designed to integrate conservation with the tourist sector. Projects will also be reviewed on an 'applicable' basis with environmental organisations. Involving fishermen in research and environmental projects. Support initiatives aimed at coastal community capacity building

	Economic Contribution: maximising the economic importance and contribution of fisheries to the development of the 'Wales' brand **Partnership working**: further the partnership working already established between policy makers, stakeholders and delivery agents for fisheries	Supporting projects that increase reliability of supply, increase value and open new markets Supply of information on projects and stakeholder involvement with policy makers and delivery agents.
European Fisheries Fund Axis 1	Small scale coastal fishing aimed at: • Improving management and control of access to fishing areas • Promoting, producing, processing and marketing chain of fisheries products • Improve professional skills and safety training	The FLAG will support pilot projects that could feed into Axis 1 through local level, sustainable and energy efficient schemes. Projects can be used to identify needs and solutions to compliment the aim of this Axis
European Fisheries Fund Axis 2	Aquaculture, Inland Fishing, processing and marketing of fisheries and Aquaculture products, aimed at: • Diversification into new species • Aquaculture methods reducing the impacts on the environment to improve practice. • Purchase of equipment to protect fish farms. • Animal health measures • Processing and marketing funds and improvement of working conditions	The FLAG has identified the role of the Aquaculture sector in the area and the use of farmed fish in improving the reliability of supply to the local area. It will aim to engage with the Aquaculture sector and facilitate relations with local fishermen, processors, restaurants and retailers, through the proposed fish Hub
European Fisheries Fund Axis 3	Measures of Common Interest, aimed at conservation measures including no fishing	All information gathered during the FLAG's project period will be disseminated

	zones	to policy holders and to fellow EU FLAG's and the Farnet group
Special Areas of Conservation (SAC)	Local management plans in Gwynedd and Anglesey	The FLAG understands the possibility of duplication with projects and will endeavour to ensure all promotional and educational events, etc. will not overlap projects already underway or planned to further the education of the SAC areas

5.0 Specific Objectives and Proposed Measures

5.1 Objective 1

Specific Objective	Support the establishment of a small scale fish processing facility by 2015 to be used by registered fishermen in order to increase their supply of prepared fish to the local market.
Rationale	Research and consultation demonstrated the potential to exploit high value finfish species in the study area such as sea bass provided catching methods are sustainable, controlled and coordinated to meet the identified local market demand. The study area also contains practically the entire Welsh aquaculture industry and as such should present opportunities for both sectors to evaluate areas for mutual collaboration and benefit. In a review of the implementation success of the Wales Fishery Strategy, Franklin (2010) reported that creating Fish Hubs gave significantly improved marketing and value adding potential for the large numbers of widely dispersed, small scale operators in the sector.
Scope of Action	The aim would be to develop a facility or facilities to process fish which would serve the study area. The activities would involve developing road map to enable this to happen within the life of the project. Previous experiences in the sector suggest the biggest barriers are relationships between fishermen and associations. Therefore efforts would initially need to be made to develop small scale projects to develop partnerships, which could then be built upon to achieve the main objective i.e. fish processing facilities.
Complementarity and Demarcation	This will compliment the already established restaurant's, cafe's and retail outlets that are faced with a poor and inconsistent supply. The small scale processing is aimed at strengthening the supply to Anglesey and Gwynedd.
Target Beneficiaries	Fishermen and fish processors
Integration into Environmental Sustainability	Encouragement of sustainable fishing practices, collection and processing will be a high requirement of involvement with this type of project.
Integration of Innovation	To encourage and achieve sustainability, 'best' practice and use of innovative practices will be focused on to reduce energy usage and minimise running costs.
Resources and Weighting	This is expected to utilise up to 25% of the projects resources. The project will be positively scored on its innovation, sustainability and environmental integration.

5.2 Objective 2

Specific Objective	By 2015 create a facility (or facilities) for fisherman to store and transport live shellfish where landings are sufficient to warrant investment leading to access to new markets and a demonstrable increase in their gross margin.
Rationale	It is estimated that over 95% of landed lobster and crab fails to secure current market prices. All three fishing associations believed it was due to the following factor • fragmented marketing • restricted outlets • dependency on local intermediaries for sales • lack of infrastructure and equipment to reach more lucrative markets on a consistent basis. • Lobster landings for the whole of Wales have remained static since 2006 while the officially recorded sale value to the economy has declined by nearly 40%. This is despite the fact that the international market demand for lobster is showing significant growth and shows little sign of slowing. China trebled demand for lobster imports between 2002 and 2006 while market forecasts by 2014 clearly demonstrate that demand is expected to easily outstrip fishery supply. This data would suggest that the value and availability of lobster will be opposed since, unlike other marine species, farmed lobster supplies remain very limited. However, it does underline why local fisheries in the study area need to establish direct sales to key UK markets – particularly the Asian sector in major cities.
Scope of Action	Fishermen would need to work in partnership in order to benefit from the support available through the scheme. If this could be demonstrated activity would be focused on methods for live storage and transportation of shellfish. Work would be undertaken in partnership with fishing associations to identify the most suitable technology, locations and management structure to ensure long term viability. Activity would also involve identifying best practice in other regions of EU, including those involved in FLAG.
Complementarity and Demarcation	This will be complimented by objective 4 and 5
Target Beneficiaries	Fisherman, crab and lobster processors.

Integration into Environmental Sustainability	Encouragement of sustainable fishing practices, collection and processing will be a high requirement of involvement with this type of project.
Integration of Innovation	To encourage and achieve sustainability, 'best' practice and use of innovative practices will be focused on to reduce energy usage, extend the storage life of the products and minimise running costs.
Resources and Weighting	This is expected to utilise up to 25% of the projects resources. The project will be positively scored on its innovation, sustainability and environmental integration.

5.3 Objective 3

Specific Objective	By 2015 support initiatives aimed at integrating tourism and coastal conservation. This would lead to new products or services which could generate income to support fish management schemes.
Rationale	The associations were unanimous in their support for improved management of inshore fisheries and considered it to be a key element of any project to support fishing communities. This is particularly so for lobster and crab fisheries which form the mainstay of fishing communities in the study area and are considered to be under significant pressure from over fishing, weak management and tourism. Unfortunately, the potential positive synergies between fisheries and tourism have not been exploited. With appropriate support the fishing industry could better integrate with the tourist trade rather than view it as a competitor. It should be possible to secure financial income from tourism to improve fishery management and long term conservation objectives
Scope of Action	Despite the importance of the coastline to the tourism industry the awareness of marine life and conservation is minimal. Conservation when presented correctly can be an important resource and actions would need to investigate and identify opportunities to provide for interpretation. This could range from small scale projects in local businesses in coastal towns and villages, bespoke interpretation centres and events and festivals. All actions would need to demonstrate a link with conservation and seek to generate income for that purpose.
Complementarity and Demarcation	Will compliment projects already established with support or environmental agencies such as Menter a Business 'Cywain', CCW, etc.

Target Beneficiaries	Fishermen, tourism operators
Integration into Environmental Sustainability	Projects that raise awareness and seek to generate income for conservation will be sourced. These projects will be expected to feed into environmental sustainability.
Integration of Innovation	Innovative ideas will be expected from projects to raise the awareness of marine life and create attractive and interesting income generation for specific environmental projects.
Resources and Weighting	This is expected to utilise up to 20% of the projects resources. A high weighting will be given to projects that have a clear link to conservation, education and interpretation.

5.4 Objective 4

Specific Objective	Support initiatives aimed at facilitating the involvement of fishermen in research and environmental education projects. The aim would be to develop an alternative source of income by utilising skills, knowledge and equipment.
Rationale	Fishermen were supportive of the effective management of the marine environment however the methods and approach used by regulatory bodies are often controversial. Involving them through the use of their knowledge and equipment could provide an additional source of income. Training to undertake the research will also lead to capacity building within the sector which could be potentially transferred to other activities, such as environmental education and tourism projects.
Scope of Action	Undertaking an audit into the available resources in the fishing industry would be the first action. This would involve creating a database of individuals involved in the fishing industry, their skills and experience, and the equipment they have available to them. This database would obviously be limited to those fishermen who are willing to cooperate on research and environmental education projects. Research would also be undertaken to type of activities that could be undertaken by the fishermen in order to identify any skills gap which could be addressed with support through the FLAG.

	In tandem with this activity there will be an investigation into the research currently being undertaken in the region, as well as into the future. A portfolio / database of information on the available resources within the sector will be made available online to be accessed by research bodies.
Complementarity and Demarcation	
Target Beneficiaries	Fishermen, tourism operators and academic/research institutes or organisations
Integration into Environmental Sustainability	Reduced duplication of resources and efficient use of those resources could not only reduce the impact on the environment but also open up possible uses of the resources that would have less impact on the environment.
Integration of Innovation	Innovative techniques to store and access this information collected will be expected from this objective.
Resources and Weighting	This is expected to utilise up to 10% of the projects resources. A high weighting will be given to projects that have a clear link utilising the resources of the fishing and tourism industry and matching them to the needs of research organisations, etc.

5.5 Objective 5

Specific Objective	By 2015 support the establishment of new enterprises focussing on direct sales of local seafood direct to the public with a focus on the tourism sector.
Rationale	Improving integration between the tourism, fishery and aquaculture sectors could present new opportunities for inshore fishermen to diversify and improve income sources through direct sales. Strategically targeted fresh seafood outlets could be just one option. Integrating supplies from capture and culture at least guarantees supplies from the farming sector which currently could supply 3 high value species in fresh and processed forms.
Scope of Action	Local seafood if presented correctly will add to the visitor experience. This has greater resonance where the visitor comes into direct contact with the fisherman and the industry. Projects will be aimed at providing opportunities for customers (visitors and locals) to purchase directly from fisherman or possibly a third party closely associated with the catch. This may involve providing opportunities to buy from the dock, establishing "seafood shacks" along the coastal path, or even "pop up" shellfish bars on beaches. Whatever the activity the aim will provide customers with fresh local seafood within the context of the indigenous fishing industry.
Complementarity and Demarcation	This objective directly compliments objectives 1 and 2, providing a local route to market for the improved supply. Synergy with local attractions such as the coastal footpath will be sought.
Target Beneficiaries	Restaurants, retail outlets, aquaculture centres,
Integration into Environmental Sustainability	Reduction of local supply 'shipped' to non local markets reduced the carbon footprint of the product. Local caught fish and shellfish processed to a high standard using environmentally sustainable means as indicated in objectives 1 and 2.
Integration of Innovation	Use of old and new but innovative practices to provide an enjoyable integrated experience of our coastal foods
Resources and Weighting	This is expected to utilise up to 10% of the projects resources. A high weighting will be given to projects that have a clear link utilising the local tourist resources of the area and that fully utilise the services offered through objective 1 and 2.

5.6 Objective 6

Specific Objective	By 2015 support initiatives aimed at developing the awareness of restaurants (and customers) of local fish leading to a demonstrable increase in its availability.
Rationale	The seafood restaurant trade in the study area clearly indicated that there was a demand for more consistent supplies of local seafood produce. However, they were often unaware that this was due to the absence of reliable landings at local ports rather than reluctance on behalf of local fishermen to supply. It is also important to emphasise that the local restaurant demand is likely to be very seasonal – an issue noted by one fishermen planning to increase landings of finfish.
Scope of Action	Beyond the specialist seafood retailers and restaurants the availability of local fish is inconsistent. In addition to actions already outlined (local processing and storage) activity also needs to be focused on developing the demand among local restaurants and hotels Where possible and practical efforts should be made to make both parties aware of each other's requirements and limitations. For example fisherman need to understand that restaurants need to plan a menu beforehand and do not normally deal in cash. Restaurants on the other hand need to realise that fish are seasonal and, in the case of fin fish, are unpredictable. Actions within this objective would be firstly to increase understanding, and secondly establish long term relationships between restaurants and fisherman. Actions could include encouraging restaurant owners to spend a day on a fishing boat and arranging seafood master classes.
Complementarity and Demarcation	Compliments Objective 1 and 2 to increase available routes to market on a local level ie Anglesey and Gwynedd
Target Beneficiaries	Restaurateurs and Fishermen
Integration into Environmental Sustainability	Through increased understanding of process and availability, restaurateurs and chefs will have an understanding of the environmental issues surrounding the catch and fishing process. This is expected to change buying patterns ie purchase of local supply rather than non local alternatives, reducing the carbon footprint of the food offered.
Integration of Innovation	The innovation here is expected in the form of ideas that will help restaurateurs etc. to understand the role of fishermen and the local catch available.
Resources and Weighting	This is expected to utilise up to 10% of the projects resources. A high weighting will be given to projects that have a clear link utilising the local tourist resources of the area and that fully utilise the services offered through objective 1 and 2.