



ANNUAL REVIEW



2017 • 2018

PROMOTING...
PROTECTING...
BUILDING...
THE INDUSTRY'S
REPUTATION

KEY FACTS ABOUT THE INDUSTRY

Fish are the most
populous pet in the UK
100+ MILLION
fish are kept in aquariums
and ponds

£400 MILLION

the amount UK fishkeepers spend a year on their hobby

14%
OF POPULATION

**4 MILLION UK
HOUSEHOLDS
OWN FISH**

3,000

UK PET SHOPS



2/3 SELL
FISH



**PETS ARE GOOD
FOR OUR HEALTH**

£2.45 BILLION
THE AMOUNT FISH ARE
ESTIMATED TO SAVE
THE NHS EVERY YEAR.

WATCHING FISH IN AN
AQUARIUM LEADS TO
REDUCED BLOOD
PRESSURE AND
REDUCES ANXIETY.

HAVING AN AQUARIUM
IN A CARE HOME'S
DINING ROOM LED TO
RESIDENTS HAVING
A BETTER APPETITE!

37 the number of
non-EU countries
which imported
live ornamental
fish into the UK
in 2017

12,000

the number of people
employed by the UK
aquatics industry



The UK aquatics industry is made up of retailers, wholesalers, manufacturers, aquatic plant growers/sellers, fish breeders, importers & consolidators and pond & aquarium consultants

KEY FACTS ABOUT THE INDUSTRY

TOP GLOBAL IMPORTERS OF AQUARIUM FISH

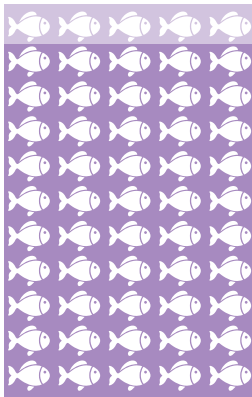


*EU countries combined top the USA as the largest importer of tropical fish

**Singapore is the main aggregator and exporter of fish from across Asia

MARINE

10%



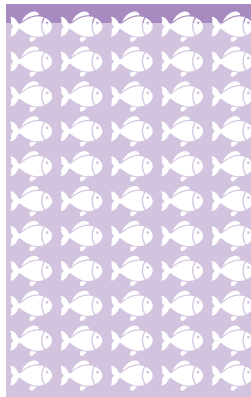
90%



Captive reared

FRESHWATER

5%



95%



Wild caught

80.9M

the annual amount of fish in tonnes caught globally from the sea

7-33M

tonnes are discards

70

tonnes are sold alive to the aquarium trade

4

tonnes of live marine aquarium fish are landed by plane in UK

TOP EU IMPORTERS OF AQUARIUM FISH

UK
GERMANY
FRANCE
NETHERLANDS
ITALY

EU IMPORTS



76%

TROPICAL FRESHWATER FISH



23%

MARINE FISH



THE GLOBAL INDUSTRY IS ESTIMATED TO BE WORTH \$18 – \$20 BILLION

NEW RESEARCH TO TACKLE ILLEGAL CYANIDE FISHING

In 2017 we joined forces with Merlin Animal Welfare and Development (part of Merlin Entertainments which run the Sea Life Aquariums in the UK) to try to tackle the issue of marine fish caught illegally using cyanide. Together, we commissioned independent Government agency CEFAS to produce two complementary reports looking at this issue.

Whilst the scale of this activity is unclear, reports of fish caught in this way tarnishes the reputation of both the home and public aquarium industries.

It is against the law in many countries to catch fish using cyanide and we want to see this practice ended. We want to trade only in legal and sustainably sourced fish. Due to the nature of this illegal, unreported and unregulated (IUU) fishing, it is difficult to say how widespread it is today, although we know it does still happen, mainly in the Coral Triangle – an area stretching from Malaysia and the Philippines, to Indonesia and the Solomon Islands.

Many thousands of livelihoods in this area rely on providing live fish for the aquarium industry. So to ensure we do not criminalise innocent fishers it is vital to find a validated detection test that accurately identifies fish caught illegally with cyanide – the chemical can also be present in water through industrial, agricultural and natural processes. Without a test that will stand up in a court of law it is difficult to take successful prosecutions.

Together, OATA and Merlin commissioned independent scientific reports examining the current challenges and how these can best be overcome to implement a robust and practical cyanide detection method. The suitability of current tests was also reviewed in a bid to come up with recommendations on ways forward to halt this illegal practice.

The two reports were undertaken by the Centre for Environment, Fisheries and Aquaculture Science (CEFAS), with the Fish Health Inspectorate (FHI) acting as independent co-ordinators. Both reports aim to facilitate further scientific research which will lead to a reliable and robust method which can be used by law enforcers to prosecute those committing this illegal practice.

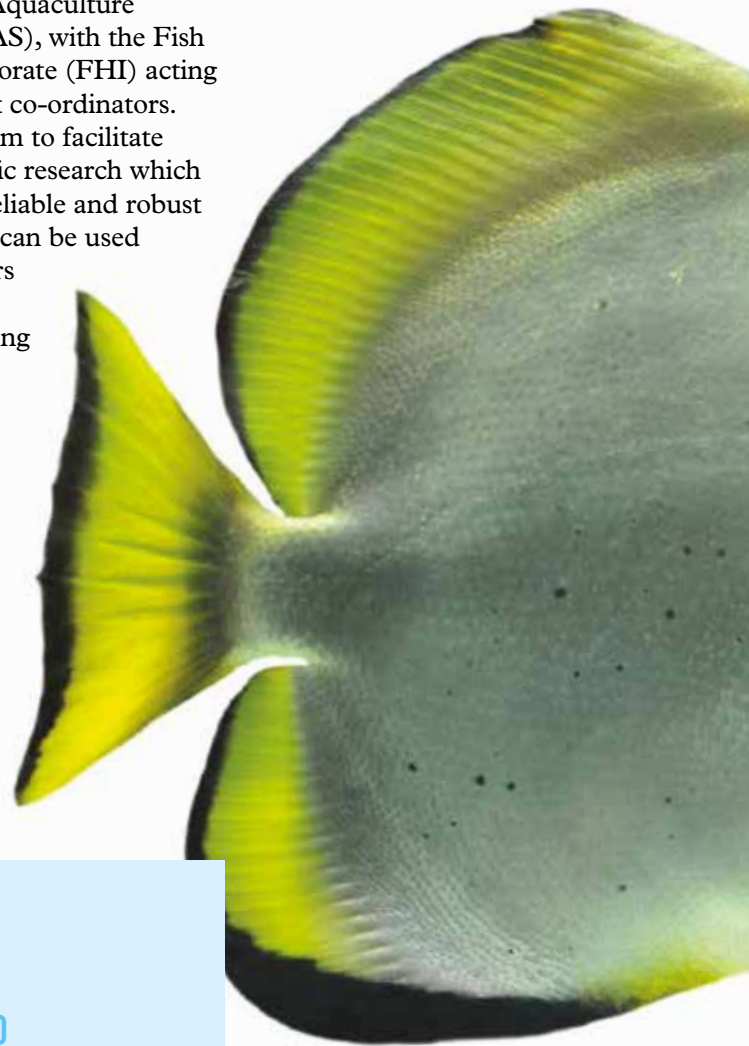
This will hopefully also act as a deterrent, helping to stamp out fishing of this kind.

Scientists at CEFAS hope to publish the findings from both reports as a peer reviewed scientific paper in 2018.

We now look to research institutions and industry partners to take forward these recommendations and we pledge to play our part in helping where we can.



READ THE CEFAS REPORTS AND
FIND OUT MORE ON OUR WEBSITE



CORAL IDENTIFICATION GUIDE

We were happy to work with the European Commission to help tackle the issue of illegally traded corals coming through Border Inspection Posts. We joined forces with Ornamental Fish International and expert OATA member businesses to create a useful guide to help customs officials differentiate between corals harvested from the wild and maricultured corals. In this document we have given advice on how to spot wild taken corals being passed off as cultured in a bid to stop this illegal trade. We are now awaiting a final sign off by the EU before publicising the guide further.

GLOBAL SPOTLIGHT

We continue to use our links with Ornamental Fish International and the European Pet Organization to amplify our messages after Hawaii, Fiji and Indonesia all announced various halts on trade in fish and corals. We are extremely concerned by these draconian – and sometimes sudden – approaches to ceasing trade. By working in partnership with global trade bodies we ensure the UK trade is not a lone voice. Together we highlight sustainable practices, the impact on local livelihoods and the potential for unintended consequences, such as local communities turning to unsustainable practices which might have a greater detrimental effect in an effort to combat sudden drops in income.

GLOBAL CONSERVATION

We are very pleased to become a founding partner of a new project, looking at freshwater fish conservation. Shoal is a new initiative aimed at engaging a wide range of organisations to develop interest and funding for freshwater species conservation, such as tropical fish. Through our regular meetings with hobby groups we have also been able to introduce UK fish groups to the discussions to enable them to bring their expertise with dedicated freshwater fish species. This is an exciting project at the beginning of its journey and we look forward to seeing how we can support it in its work.

THE TRADE IN WILD CAUGHT PET FISH CAN CONTRIBUTE TO HABIT CONSERVATION AND SUSTAINABLE EMPLOYMENT IN SOME OF THE POOREST PARTS OF THE WORLD.



PET SHOP LICENSING REVIEWS ACROSS THE UK

Plans to reform the pet shop licensing system in England have greatly occupied our time during this year, and Scotland may also be at the start of a potential reform of its regime.

The new English Animal Activities Licensing system – which will cover more businesses than just pet shops – comes into force on 1 October 2018. Unfortunately, we believe this was a missed opportunity by the Government to introduce meaningful mandatory standards – something OATA has, for many years, been calling for. OATA was only invited to be involved at a very late stage of the process, which made it extremely difficult to influence the outcomes.

We believe that businesses will face overly cumbersome and bureaucratic standards that do not necessarily do anything to enhance animal welfare. We are

also extremely concerned that local authority inspectors have three years to get the relevant training, while English businesses will be expected to comply immediately, leading to yet more inconsistent enforcement.

To help our English members we are creating guidance documents to help them get ready for inspections and we will monitor enforcement over the next few years to make a case to Government about where improvements need to be made.

In Scotland, a Member's Bill has been presented to look at purely pet shop licensing. While, on the face of it, what is proposed looks

promising we are concerned that it may make the same mistakes as the English review. We have already responded in detail and now await the outcome.

Meanwhile in Wales and Northern Ireland there are no plans to review pet shop licensing as far as we know. This does mean that there continues to be a plethora of different standards across the UK, some mandatory, some not. As a UK trade association we believe this is a highly unsatisfactory situation which certainly does nothing to improve animal welfare.

WE WANT CLEAR, CONSISTENT AND MANDATORY LICENSING STANDARDS TO BE EQUALLY APPLIED TO ALL UK BUSINESSES THAT TRADE IN LIVE ANIMALS, ENFORCED BY COMPETENT AND PROPERLY TRAINED INSPECTORS.



CAUDATA RULES

We welcomed new EU rules on the import of *Caudata* amphibians such as newts and salamanders which were introduced in July 2018 in the UK. The rules seek to stop the spread of the fungal pathogen, *Batrachochytrium salamandrivorans* (Bsal). While undoubtedly more onerous for importers, we support the need to protect UK biosecurity. The measures are temporary however so it's now up to our industry to demonstrate responsible preventative biosecurity measures can work and that kneejerk bans are not always the only way to tackle an issue.

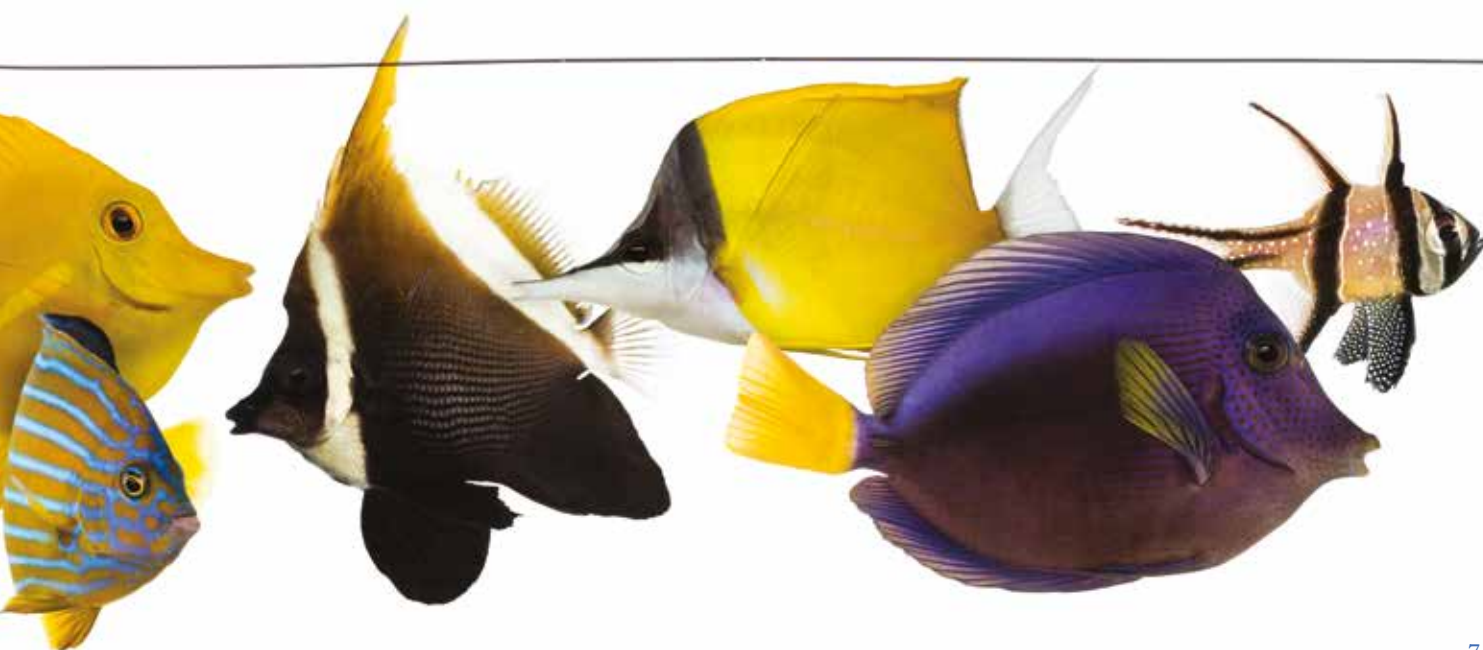
WELSH EXOTIC PET PETITION

We have been keeping an eye on a petition in the Welsh Assembly that seeks agreement to 'end the exotic pet trade in Wales'. Tropical fish are of course exotic pets so we put together a submission to the Petitions Committee to remind them about the bigger picture when discussing this subject. We're glad that subsequent meeting discussions have shown an understanding of the implications and we wait to see the final outcome.

PET FISH ARE GOOD FOR
PEOPLE, THEIR HEALTH AND
THE UK ECONOMY.

HAVING OUR SAY

A key role for OATA is to amplify the industry voice when reforms or new laws are proposed by Government. As a niche industry issues can affect us because the wider effects of what is proposed have not been considered. During this year we've responded to a variety of consultations, calls for evidence and Select Committee inquiries on issues as varied as animal sentience, third party sales of animals (eg in a pet shop), animal welfare in transport, biosecurity post-Brexit and invasive species enforcement regimes. Our main aims are always to alert and avert unintended consequences by highlighting the specialist nature of the species we trade in and remind Government of the high standards OATA members already operate to.



CHANNA SAVED FROM POTENTIAL BAN

Plans to ban the sale of Channa across the whole of the UK had a reprieve in early 2018 following a challenge by OATA to the EU.

A proposal by Spain had put the whole *Channa* genus in jeopardy but our Assistant Chief Executive Dr Tracey King put together a detailed rebuttal of the Spanish risk assessment, effectively pulling apart the reasons put forward for stopping the sale and keeping of the fish.

OATA then joined forces with the European Pet Organization and Ornamental Fish International to help make its case for *Channa*. It is highly unusual for a whole genus to be put forward for a ban and it was another example of a species that would not flourish and breed in UK waters.

We were also pleased that the EU accepted the need to look at its risk assessment process, and it seemed to take on board some of the comments we made that the whole system needs review to ensure it is robust and effective.

However, despite putting plans to ban another three aquatic plant species on hold in 2018, it looks like these will be listed in 2019. This means they will be part of any transition arrangements after Brexit. The three plant species *Gymnocoronis spilanthoides* (Senegal tea plant), *Pistia stratiotes* (Water lettuce) and *Salvinia molesta* (salvinia) join yet more

species now being considered by the EU, including *Plotosus lineatus* (Striped eel catfish) and *Xenopus laevis* (African clawed frog).

We will examine and respond to the risk assessments proposed for all species but achieving the same success as we did with *Channa* will be very challenging.

OATA'S GOT GLOBAL REACH BY REPRESENTING THE UK INDUSTRY AT EUROPEAN AND WORLD MEETINGS AND BY BEING A MEMBER OF ORNAMENTAL FISH INTERNATIONAL AND THE EUROPEAN PET ORGANIZATION.



Many thanks to Colin Dunlop for this photo of his *Channa andrao*

BREXIT UPDATE

We have two simple messages for the Government as the UK approaches leaving the European Union. These are not to over-regulate livestock imports and to ensure domestic businesses are able to compete with foreign imports, notably in terms of product standards, by ensuring a level playing field.

We have used our position paper (available on our website) as the basis for discussions with Government departments during 2018, including with Defra and its agencies on post-Brexit import/export controls. We advocate for a more risk-based approach that delivers direct benefits ('earned recognition') to those businesses demonstrating high standards and excellent rates of compliance. Discussions have clarified the Government seeks to stay as close as possible to the current regulatory regime on 'Day One', with no substantive legislative changes other than those required to make it functional.

While some policy teams are beginning to consider longer term options for regulatory change, it is disappointing that many in Government have been very slow in looking beyond 'Day One' scenarios, making it very challenging for businesses to plan for the longer term.

ENFORCING THE RULES

There is growing disillusionment in our industry about the failure to enforce the increasing number of sales bans being introduced as a result of the EU Invasive Alien Species Regulation. Industry is playing its part in taking these species off the shop shelves. But businesses are finding it extremely frustrating to then see banned species easily available to buy online, with little proactive action being taken by enforcement agencies to stop these illegal sales. We have been meeting with relevant government officials to highlight this, along with our disappointment that a consultation on an enforcement regime for this EU regulation was introduced so long after the law has been on the statute books.

GARS ALERT

During this year we have worked with the Fish Health Inspectorate (FHI) in England and Wales to ensure our industry only imports pure bred Florida and Cuban gars. FHI approached OATA after it became concerned about the import of hybrid and/or colour morphs of gars because they may exhibit greater tolerance to cold and so become an invasive risk. We raised awareness among our members and published detailed advice on our website and shared on our social media channels. We believe that investing in education and responsible preventative measures are better ways to deal with these issues than blanket bans, which can drive trade underground.



WE SEEK TO PROMOTE HIGH STANDARDS THROUGHOUT THE INDUSTRY THROUGH OUR CODE OF CONDUCT, TRANSPORT CODE AND ONLINE SELLING GUIDE ALONG WITH ALL THE FREE INFORMATION, ADVICE AND VIDEOS WE PROVIDE FOR RETAILERS TO USE IN THEIR SHOPS.

IMPROVED STAFF TRAINING PACKAGES

Having qualified and knowledgeable staff lies at the heart of a successful business and OATA has offered specific aquatic training packages for more than two decades which are highly respected across the industry.

This year we have given our training packages a major overhaul. We are very pleased to be working towards securing City and Guilds accreditation for both our Foundation and Advanced training courses. We believe having accreditation from a well-recognised training body will make our training even more attractive for businesses and for staff to put on their CVs.

We are also planning to take the current paper-based programmes online with improved content. Both the Foundation and Advanced training courses are home-study, with students learning at their own pace before they take the assessments. This

also has the added benefit for businesses because they do not have to take time away from the day job to go to college and staff can start putting what they learn into practice every day they go to work.

And for the first time the two training courses are now available internationally, through our fellow trade association Ornamental Fish International. We launched the global programmes at Interzoo 2018. We believe making our courses, which are well-respected within the UK industry, available internationally is a great way to spread good practice globally.

Training programmes for pet shop staff are always important, and never more so now with both Defra in England and the Scottish Government looking at reforms to pet shop licensing regimes.

The English licensing regime places mandatory commitments on businesses to train their staff appropriately for the species they keep and other licensing systems across the rest of the UK have conditions on training staff to be competent in the species they sell. We wholeheartedly support this as part of any pet shop licensing regime.



OATA IS PART OF THE ORGANISATION BEHIND THE SUCCESSFUL AQUA SHOW IN TELFORD – THE BIGGEST AQUATICS TRADE SHOW IN THE UK – WHICH OFFERS A FANTASTIC SHOWCASE FOR THE BEST IN THE INDUSTRY.

NEW LEAFLETS

We added to our range of free information this year with two new leaflets. One looked at giving advice on how to prevent otters from helping themselves to the contents of a fish pond, prepared in partnership with the Wild Otter Trust. Our other leaflet on preventing palytoxin poisoning was written following a request for assistance from Health Protection Scotland. There has been a spate of news stories about people suffering ill effects after cleaning or handling certain corals so our leaflet offers some simple tips for people to follow.

PET CHARITY LINKS

Our Chief Executive sits on the board of The Pet Charity which has been set up to promote responsible pet ownership. The charity has some exciting projects in the pipeline, including the National Centre for Reptile Welfare which is due to open its doors in 2018. Another important project is its online Pet Portal which will be a free service hosting a wide range of good quality pet care information, another important resource for pet shops to enable them to offer great customer service to new pet owners and help to demonstrate compliance with new licensing requirements. See a draft version of what's planned at petportal.org.uk/index.html

MEMBER BENEFITS

As a member organisation we are always on the lookout for ways to improve what we do for those businesses which support us. During this year we launched a new range of member benefits – giving businesses access to a wide range of free help and information on issues such as human resources, tax, business finance and legal questions, to help them get better at what they do. The new service comes with a free helpline, document library and business audits to help identify areas that need work.



EVERYONE IN OUR INDUSTRY HAS A KEY ROLE TO PLAY IN EDUCATING PEOPLE TO PICK THE RIGHT PET FOR THEIR LIFESTYLE AND CARE FOR IT PROPERLY – THE KEY TO HAPPY AND HEALTHY PETS.

FROM THE CHIEF EXECUTIVE

As my second year as Chief Executive passes, my conviction grows about how vital it is to build strong relationships and partnerships with other organisations – both in this country and abroad – to showcase and build awareness about the great work our industry is doing in terms of welfare, conservation, sustainability and legal trade.

Despite the UK's plans to leave Europe I believe we must still have a voice in the wider debate about animal welfare and illegal trade. We must remember animal welfare issues recognise no borders. So we continue to play a strong role in the European Pet Organization (which covers the whole of Europe, not just the EU) and Ornamental Fish

International. Banding together with fellow pet trade organisations makes everyone's voice stronger (and harder to ignore), vital when you think about the size and resources of international animal rights organisations. Fish welfare for example is now on the radar of European groups.

Brexit continues to be something that affects almost everything we are involved in. It is certainly the topic that comes up in nearly every discussion we have had with Government during this year. But we remain concerned that the lack of clarity about what is happening is distracting from quality policy-making and is making it very hard for us to be heard by Government officials. We will however continue to

engage in these discussions to seek the best outcomes for our sector.

Finally, I would like to thank our Board of Directors for their unstinting support to the office team, to our members for their continued involvement, and without whom we couldn't have the impact we do in Government, and not least to the excellent and highly professional team with whom I have the pleasure to work.

Dominic Whitmee



FROM THE CHAIR

I join Dominic to echo how vital it is that we are vocal about the good work the industry is doing.

Among the many projects undertaken by the team this year I'd like to shine a light on a few. The first is the huge amount of work involved in revising OATA's training packages ready for City and Guilds accreditation, and turning them into online courses. While this specialist aquatics training is well-recognised within the UK industry we believe C&G accreditation will make it yet more attractive to staff – and comes at time when pet shop licensing regimes are under greater scrutiny and change across the UK. Well-trained shop staff are an important way to drive up standards – and so we were pleased to start offering our training globally through OFI. I'd also like to thank the Board members who have volunteered their expertise to revitalise our training packages.

Other major projects worth highlighting are our work commissioning Cefas to look at cyanide metabolism in fish, an excellent example of working in partnership (this time with Sea Life Aquariums), and the new Animal Activities Licensing in England. This has been a major project for such a small team to work on and they are already planning follow-up activity to monitor how it is implemented.

As an industry that relies on seamless border crossing, Brexit looms large as an issue in our minds. OATA is concerned by the proliferation of apparently un-strategic and open-ended initiatives flowing from Government, especially Defra, which could have significant impacts on our sector. The office has had to respond to a number of Government calls for evidence and consultations to raise awareness about potential unconsidered side-effects for our

industry. It seems unlikely that this work will lessen as we approach the official EU leaving date in March 2019.

Lastly, I'd like to salute the OATA office team – we've seen new faces join over the past couple of years and yet this small team has come together quickly to continue to offer a seamless service to members and the wider industry. I'd also like to thank the OATA Directors who give their time for free – we have a great mix of industry knowledge on our Board.

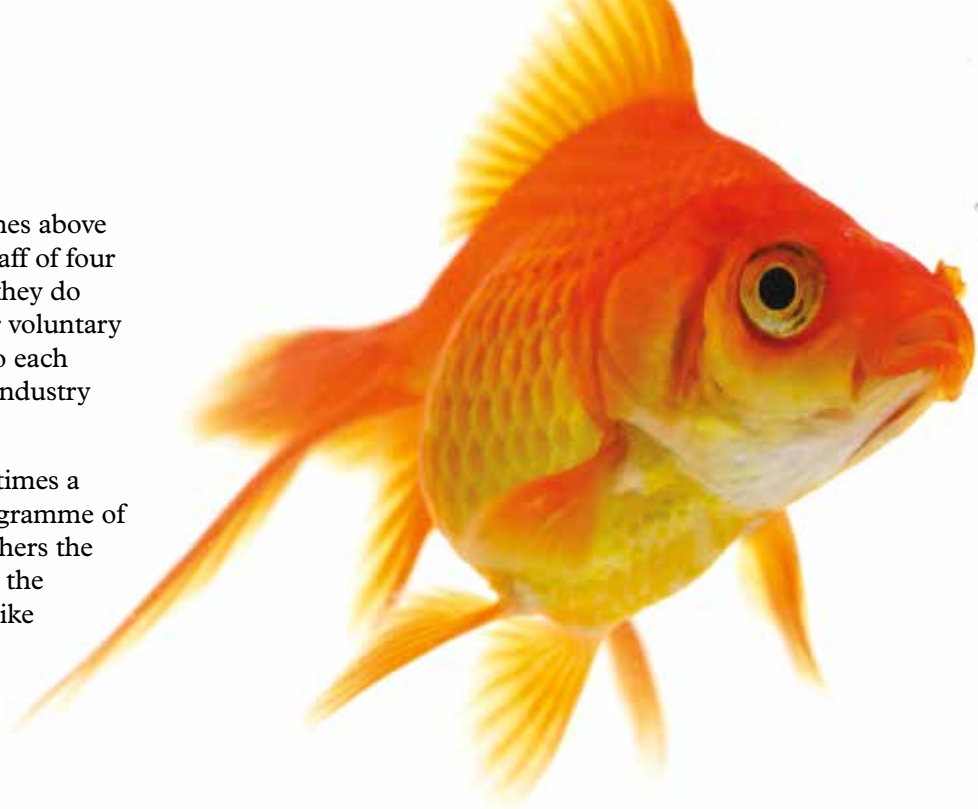
Ruth Low



ABOUT OATA

We believe OATA is an organisation that punches above its weight. Our small staff of four can only achieve what they do with the support of our voluntary Board of Directors who each brings their particular industry expertise to our work.

Our Board meets four times a year and we have a programme of New Blood, offering others the chance to take a seat at the table and see what it's like to be a Board member. If this interests you then email or talk to our Office Manager Ray Valovec.



ABOUT OATA

STAFF

Dominic Whitmee
Chief Executive

Dr Tracey King
Assistant Chief Executive

Ray Valovec
Office Manager

Pauline Davey
PR & Parliamentary Officer
(part-time)

DIRECTORS (AS AT JUNE 2018)

Ruth Low
Chair
Gordon Low Products Ltd

James Allison
Aquapic Solutions

Kevin Barton
ALF (Aquatic Distributors) Ltd

Pete Carey
Pets at Home Ltd

Robert Edgecock
Independent Aquatic Imports Ltd

Mark Evenden
Devotedly Discus Ltd

Caroline Everett
Anglo Aquatic Plants Co Ltd

Neil Hardy
Neil Hardy Aquatica Ltd

Simon Langdale
Maidenhead Aquatics @ Iver

Philip Lawton
Kidsgrove Tropicals

Dr David Pool
FishScience Ltd

Kevin Rose
Lynchford Aquatics Ltd

Dr Donna Snellgrove
Mars WALTHAM

Matthew Stevenson
Seneye

Simon Strode
Tetra

Paul West
Cranswick Pet and Aquatics
(Trading as Tropical Marine
Centre)

Ben Windeatt
Pets Choice

Mark Winter
Aqua Pacific Ltd

NEW BLOOD (NON-VOTING)

Richard Maude
Pedigree Wholesale Ltd

Pete Smith
Aquasense (UK) Ltd

ANNUAL GENERAL MEETING

This year's AGM is being held on Wednesday 3 October 2018 at The Manor, Weston-on-the-Green, Oxfordshire OX25 3QL.

All OATA members are welcome.

CONTACT OUR OFFICE

By phone on 01373 301353

By email on
info@ornamentalfish.org

By writing to OATA, Wessex House, 40 Station Road, Westbury, Wiltshire, BA13 3JN

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Registered office: Wessex House, 40 Station Road, Westbury, Wiltshire, BA13 3JN

JOIN OATA – AND FEEL THE BENEFIT

STRENGTH IN NUMBERS

We make the voices of our members heard at local, European and global levels by representing a broad range of businesses involved in the industry. Membership support is vital to our continued success and by joining OATA businesses help to keep the industry alive.

WHAT DOES OATA DO FOR THE AQUATIC INDUSTRY?

- We lobby and challenge UK, European and world bodies/governments to make sure fish/plants/invertebrates/dry goods/medications remain available for sale.
- We offer high quality training packages on fish-keeping for staff and individuals which are recognised by local authorities.
- We seek to promote high standards of husbandry and welfare within the industry with our Code of Conduct and free point of sale information.
- We help our members to keep up-to-date with the latest news that could affect their business through our monthly e-newsletter and the broad range of information on our website and social media.
- We provide free business support services to help our members find solutions to common issues.
- We promote the hobby of fishkeeping through our online videos, social media and our work with the press.

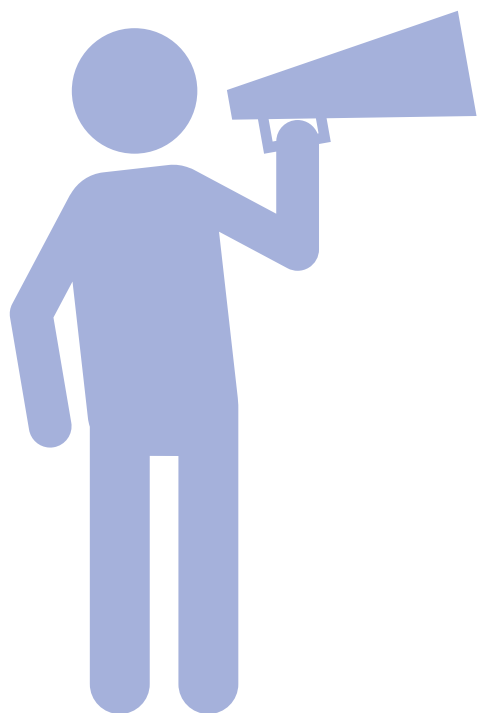
As a member, you benefit from:

- Practical help and support to enable you to stay ahead of the competition, including a wide range of information to help with running a small business.
- Free helpline and document library when businesses need some advice fast on issues like HR/employment rights, health & safety, legal, tax and VAT.
- A free audit of insurance arrangements to take the hassle out of getting the best cover.
- Free HR and Health & Safety checks.
- Membership of our Primary Authority schemes which gives OATA members robust advice which they can rely on (especially helpful to small business that do not have the money or expertise to tackle some of the regulatory issues they face). You also have a regulatory authority supporting you if challenged about the advice you are following.
- Discounts on our fishkeeping training courses to give businesses the best-trained staff.
- Safeguarding the future of industry and your business.



FIND OUT MORE ABOUT BECOMING A MEMBER

VISIT WWW.ORNAMENTALFISH.ORG OR GIVE US A CALL ON 01373 301353



OATA IS...

the voice of the ornamental
aquatics industry in the UK

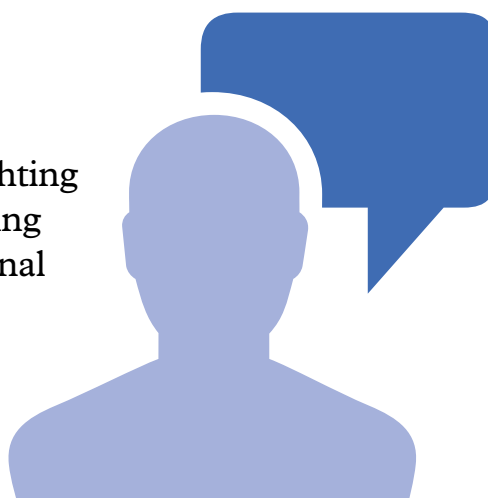
OATA HAS...

more than 850 business members
from shops and importers to dry
goods manufacturers, wholesalers
and pond consultants

**FOR EVERY £1 SPENT ON OATA MEMBERSHIP
WE'VE SAVED THE INDUSTRY £100**

OATA SAVES...

the industry tens of millions of pounds by fighting
to keep products and fish on sale or challenging
regulatory proposals that could mean additional
costs to the industry



THE VOICE OF THE ORNAMENTAL FISH INDUSTRY



ORNAMENTAL
AQUATIC TRADE
ASSOCIATION

Ornamental Aquatic Trade Association Ltd
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