



AQUACULTURE PRODUCTION IN THE EUROPEAN UNION

Aquaculture production in the European Union remains relatively stagnant compared with the rising rates of farmed seafood production at world level. Over the past 20 years, the Commission has attempted to gear up EU production potential through the publication of various strategy and guideline papers, and the Aquaculture Advisory Council (AAC) was established in 2016 in that vein. This body is made up of representatives of the industry and other relevant stakeholder organisations and gives advice to the EU institutions and the Member States. On 12 May 2021, the Commission published its new strategic guidelines for a more sustainable and competitive EU aquaculture.

BACKGROUND

Whereas there was a fourfold increase in aquaculture production globally between 1990 and 2017, the aggregated production of farmed seafood in all EU Member States remained stable for a long time, at around 1.2 million tonnes. EU production figures have, however, increased recently by around 24%, with the value of EU aquaculture production reaching EUR 5.6 billion in 2017. Fish products accounted for 76% of this figure and crustaceans and molluscs for 24%. EU aquaculture producers have primarily focused on four species – mussels (35% of the total volume), salmon (15%), trout (14%) and oysters (7%) – with other important farmed species in the EU being sea bream, carp, sea bass and clams.

The main aquaculture producers among the EU Member States in 2017 were Spain (21%), France (15%), the United Kingdom (14%), Italy (14%) and Greece (10%), which together accounted for around 74% of total aquaculture production. However, in terms of the value of production, the UK was the leading producer (21%), followed by France (16%), Spain (13%), Greece (12%) and Italy (11%). Bivalve molluscs (mussels, oysters and clams) were dominant in Spain, France and Italy. The UK produced mainly salmon, while Greece produced mainly sea bass and sea bream.

A STRATEGY FOR THE SUSTAINABLE DEVELOPMENT OF EUROPEAN AQUACULTURE

As a first attempt to tackle the stagnation of aquaculture production in the EU, the Commission published, in 2002, a communication ([COM\(2002\)0511](#)) entitled 'A strategy for the sustainable development of European aquaculture'. The objectives of this strategy were:



- Creating long-term secure employment, particularly in fisheries-dependent areas, and increasing employment in aquaculture by between 8 000 and 10 000 full-time job equivalents over the 2003-2008 period;
- Ensuring the availability to consumers of products that are healthy, safe and of good quality, as well as promoting high animal health and welfare standards;
- Ensuring an environmentally sound industry.

However, the strategy did not achieve its objectives, particularly as regards increasing production and employment: neither the target of a 4% growth rate nor that of 8 000 to 10 000 new jobs was achieved.

The main problem for the aquaculture sector has been the lack of production growth, in contrast to the high growth rate observed on a global scale. The sector has, however, seen good progress in areas such as ensuring availability of quality products to the consumer and ensuring environmental sustainability.

In addition to the traditional obstacles and constraints, EU aquaculture has met with increased competition from production in non-EU countries since 2002, and has had to face crises of governance and the effects of the economic crisis after 2007.

BUILDING A SUSTAINABLE FUTURE FOR AQUACULTURE – A NEW IMPETUS FOR THE STRATEGY FOR THE SUSTAINABLE DEVELOPMENT OF EUROPEAN AQUACULTURE

Seven years later, on 8 April 2009, the Commission published its second communication ([COM\(2009\)0162](#)) on aquaculture, seeking to identify and address the causes of the stagnation of EU aquaculture production. This new communication was entitled 'Building a sustainable future for aquaculture: A new impetus for the Strategy for the Sustainable Development of European Aquaculture'. It aimed to ensure that the EU remained a key player in this strategic sector, increasing production and employment by implementing the following actions:

A. Promoting the competitiveness of EU aquaculture production by:

- Fostering research and technological development;
- Promoting spatial planning for aquaculture in order to tackle the problem of competition over space;
- Enabling the aquaculture business to cope with market demands;
- Promoting aquaculture development in its international dimension.

B. Establishing conditions for sustainable growth of aquaculture by:

- Ensuring compatibility between aquaculture and the environment;
- Shaping a high-performance aquatic animal farming industry;
- Ensuring consumer health protection and recognising the health benefits of aquatic food products.



- C. Improving the sector's image and governance by:
- Better implementing EU legislation;
 - Reducing the administrative burden;
 - Ensuring proper stakeholder participation and the provision of appropriate information to the public;
 - Ensuring adequate monitoring of the aquaculture sector.

STRATEGIC GUIDELINES FOR THE SUSTAINABLE DEVELOPMENT OF EU AQUACULTURE

Ultimately, the strategic guidelines ([COM\(2013\)0229](#)) published by the Commission on 29 April 2013 aimed to assist the Member States in defining their own national targets, taking account of their relative starting positions, national circumstances and institutional arrangements. These guidelines covered four priority areas:

- Simplifying administrative procedures and reducing licencing time for aquaculture farms;
- Coordinated spatial planning to overcome the hindering effect of lack of space;
- Enhancing the competitiveness of EU aquaculture;
- Promoting a level playing field.

MULTIANNUAL NATIONAL STRATEGIC PLANS

As established through Article 34 of the common fisheries policy (CFP) basic regulation ([Regulation \(EU\) No 1380/2013](#)), Member States had to submit [multiannual national strategic plans](#) (MANPs) for the development of aquaculture activities on their territory for the 2014-2020 period. The Commission encouraged the exchange of information and best practices among Member States through different workshops and meetings. As a follow-up measure, it facilitated the coordination of the national measures envisaged in the MANPs.

STRATEGIC GUIDELINES FOR MORE SUSTAINABLE AND COMPETITIVE EU AQUACULTURE FOR THE 2021 TO 2030 PERIOD

On 12 May 2021, the Commission published its new strategic guidelines ([COM\(2021\)0236](#) including an annex) for more sustainable and competitive EU aquaculture. It presents a vision for the further development of aquaculture in a way that will contribute both to the European Green Deal and to the economic recovery following the COVID-19 pandemic. The new guidelines build on experience at EU and national strategic level and take into account the latest developments, including research, innovation and the use of EU funding. They also respond to calls in the farm to fork strategy to accelerate the transition to a sustainable EU food system, recognising the potential of sustainable aquaculture to provide food and feed with a low carbon footprint.



Achieving this vision will require addressing the different challenges and opportunities of the EU aquaculture sector in order to reach the following inter-related objectives, namely:

- Building resilience and competitiveness;
- Participating in the green transition;
- Ensuring social acceptance and consumer information; and
- Increasing knowledge and innovation.

The strategic guidelines identify 13 areas where further work is needed to ensure the sustainability, competitiveness and resilience of EU aquaculture. The guidelines provide specific recommendations and propose concrete actions to be taken by the Commission, the EU Member States and the AAC.

EU countries have reviewed their national aquaculture strategies in the light of the guidelines, which will also structure the use of relevant EU funding, in particular the European Maritime, Fisheries and Aquaculture Fund.

The EU also supports research and innovation on key aspects of EU aquaculture: from its interactions with the environment, to the health and nutrition of farmed fish, to reproduction and breeding. Research and innovation on sustainable aquaculture is a priority under Horizon Europe, the EU framework programme for research and innovation.

ROLE OF THE EUROPEAN PARLIAMENT

Parliament has adopted numerous resolutions aimed at further strengthening the EU's aquaculture sector:

- [Resolution of 16 January 2003](#) entitled 'Aquaculture in the European Union: present and future';
- [Position of 27 April 2006](#) on the proposal for a Council directive on animal health requirements for aquaculture animals and products thereof, and on the prevention and control of certain diseases in aquatic animals;
- [Position of 14 November 2006](#) on the proposal for a Council regulation concerning use of alien and locally absent species in aquaculture;
- [Position of 14 November 2006](#) on the proposal for a Council regulation amending Council Regulation (EC) No 104/2000 on the common organisation of the markets in fishery and aquaculture products;
- [Resolution of 4 December 2008](#) on the adoption of a European Cormorant Management Plan to minimise the increasing impact of cormorants on fish stocks, fishing and aquaculture;
- [Resolution of 17 June 2010](#) on a new impetus for the Strategy for the Sustainable Development of European Aquaculture;
- [Resolution of 8 July 2010](#) on the arrangements for importing fishery and aquaculture products into the EU with a view to the future reform of the CFP;



- [Position of 23 November 2010](#) on the proposal for a regulation of the European Parliament and of the Council amending Regulation (EC) No 708/2007 concerning the use of alien and locally absent species in aquaculture;
- [Position of 12 September 2012](#) on the proposal for a regulation of the European Parliament and of the Council on the common organisation of the markets in fishery and aquaculture products;
- [Position of 10 December 2013](#) on the Council position at first reading with a view to the adoption of a regulation of the European Parliament and of the Council on the common organisation of the markets in fishery and aquaculture products, amending Council Regulations (EC) No 1184/2006 and (EC) No 1224/2009 and repealing Council Regulation (EC) No 104/2000;
- [Resolution of 8 September 2015](#) on untapping the potential of research and innovation in the blue economy to create jobs and growth;
- [Resolution of 12 May 2016](#) on traceability of fishery and aquaculture products in restaurants and retail;
- [Resolution of 12 June 2018](#) entitled ‘Towards a sustainable and competitive European aquaculture sector: current status and future challenges’;
- [Position of 17 April 2020](#) on the proposal for a regulation of the European Parliament and of the Council amending Regulations (EU) No 508/2014 and (EU) No 1379/2013 as regards specific measures to mitigate the impact of the COVID-19 outbreak in the fishery and aquaculture sector, which was adopted as [Regulation \(EU\) 2020/560](#);
- [Position of 6 July 2022](#) on the proposal for a regulation of the European Parliament and of the Council amending Regulation (EU) No 508/2014 as regards specific measures to alleviate the consequences of Russia’s war of aggression against Ukraine on fishing activities and to mitigate the effects of the market disruption caused by that war of aggression on the supply chain of fishery and aquaculture products, which was adopted as [Regulation \(EU\) 2022/1278](#).

Marcus Ernst Gerhard Breuer
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