



OPINION

European Economic and Social Committee

Strategic Guidelines for the sustainable development of EU aquaculture

Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on Strategic guidelines for a more sustainable and competitive EU aquaculture for the period 2021 to 2030
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1. Conclusions and recommendations

- 1.1 The EESC supports the efforts and initiatives launched by the European Commission to help the sector grow and become more sustainable. Despite this, the EU aquaculture sector is not fulfilling its true growth potential. The EESC expresses concerns about the fact that 65% of the aquatic products consumed in Europe come from imports¹.
- 1.2 Consumer choices have evolved towards a more nutritional lifestyle, with fish and aquaculture products topping the list. This represents an opportunity for significant growth in the sector, but also a responsibility to ensure future EU food security. Securing safe, healthy and sustainable food in the EU should be one of the top priorities.
- 1.3 A coordinated effort from the European Commission and the Member States is needed to enhance the production capacity and profitability of the sector. Immediate simplification of administrative procedures must be complemented by high environmental standards, in order to preserve ecosystems and biodiversity, and improve quality of water. The EESC welcomes the Commission's proposal to set up aquaculture licensing one-stop-shops in all Member States.
- 1.4 The EESC considers that the right balance needs to be found between preserving the Earth's biodiversity and meeting the necessary food requirements, taking into consideration social impact, healthy living and environmental protection. Marine and inland waters should be preserved and protected, while promoting sustainable aquaculture activities that would ensure the necessary food for the EU population.
- 1.5 Space availability represents an important hurdle for the sector's development. The EESC considers that aquaculture facilities need to be further developed, especially within coastal and rural areas across the Union, in places where other economic activities are not suitable. The EESC calls on the Member States to put in place coordinated spatial planning projects, including sea basin level planning, restoring of abandoned aquaculture facilities and big data analytics systems.
- 1.6 The EESC believes that the involvement of the social partners and relevant civil society organisations in the future development strategy of the sector will create value added for the Union. They can provide both high-level expertise and excellent communication opportunities.
- 1.7 The EESC considers that the relationship between the stakeholders along the value chains must be an ethical one. SMEs and start-ups should be fully supported to grow, provide high-quality jobs and create new sustainable economic models, while the public-private partnerships should benefit from financing instruments that cover long-term commitments.
- 1.8 Educational and vocational training programmes can help meet the sector's needs for a high-skilled labour force. In this regard, calls for proposals for the aquaculture sector can be financed using the European Social Fund.

¹ https://www.eumofa.eu/documents/20178/415635/EN_The+EU+fish+market_2020.pdf

- 1.9 Labelling requirements have a very important role in informing consumers about the quality of aquaculture products. European citizens should be provided with trustworthy information, especially on products that come from countries with little or no legislative framework. Traceability requirements should be processed backwards, down to the hatcheries, for all products in the internal market. The final goal should be a 100% level playing field in the Single Market.
- 1.10 Communication on the efforts and progress that the sector is making to ensure environmental and climate performance is paramount to ensure social acceptance and familiarise consumers with the efforts being made. Waste management systems are immediately needed for a sector that has a high potential to reduce its environmental footprint. The sector also has considerable potential to embrace circularity and renewable aquatic resources, while striving to reduce energy consumption and carbon emissions.
- 1.11 Rapid and large-scale public and private investment is needed, especially in research and development activities. The Commission should promote all the relevant available EU funds and partnership opportunities through the social partners and civil society organisations networks, with the final aim of reaching all the producers, especially SMEs.
- 1.12 The EESC appreciates and supports the proposal to create an EU Aquaculture Assistance Mechanism with a dedicated online platform, and considers that an Aquaculture Growth Strategy that would boost the sector's potential is urgently needed at European level.

2. **Background**

- 2.1 According to the Food and Agriculture Organization of the United Nations (FAO) "the world population could increase by more than two billion people from today's levels, reaching 9.15 billion by 2050. Incomes will grow even faster. To meet increased demand, FAO projects that global agricultural production in 2050 will be 60 percent higher than in 2005"². The aquaculture sector has the potential to grow and meet a large part of this demand and release some of the pressure that has been put on the agriculture sector.
- 2.2 Aquaculture production is vastly dominated by countries from Asia with a roughly 89% share over the last two decades³. In the EU, aquaculture production varies from traditional tanks and lagoons to the use of cages and tanks in the open sea or recirculating systems. The sector directly employs over 74 000 people in more than 12 000 companies⁴.
- 2.3 The EU is the second largest trader of fishery and aquaculture products in the world, after China. As a net importer, the EU had a trade balance deficit of EUR 21 billion in 2019. The EU production of aquaculture represents only 1.15% of the total global production according to the

² http://www.fao.org/fileadmin/user_upload/esag/docs/AT2050_revision_summary.pdf

³ [Expert Working Group on Economic Report of EU aquaculture sector](#)

⁴ https://stecf.jrc.ec.europa.eu/reports/economic/-/asset_publisher/d71e/document/id/2871698

most recent figures⁵. A Eurobarometer study from 2017⁶ showed that the vast majority of EU citizens consume seafood at least once a month, with older consumers doing so more often.

- 2.4 The European Commission Communication on Strategic Guidelines for a more sustainable and competitive EU aquaculture⁷ is a very comprehensive analysis of the current situation in the aquaculture sector and presents many valid courses of action for how the sector can become more sustainable and competitive. The EU is clearly committed to further delivering on the European Green Deal and Farm to Fork Strategy objectives.

3. General comments

- 3.1 Fish and other aquatic products have high nutritional value and are highly recommended for maintaining good health. Consumers have increased their demand for, and expectation of, high-quality sustainable products that provide a healthy diet. The excellent quality of EU aquatic food still represents a major competitive advantage. However, the sector is not fulfilling its true growth potential and is shrinking in terms of its percentage of global production, compared to other parts of the world.
- 3.2 The EESC considers that the EU aquaculture sector should provide many more products to meet demand in the internal market. It is still unbelievable that 65% of the aquatic products consumed in Europe come from imports. As it stands now, the European Union is jeopardising its future food security. The EESC has already stressed that "*the external trade imbalance in aquatic products is unacceptable, both from an economic point of view, given the trade deficit that this entails, and from a social point of view, given the missed opportunities for employment*"⁸. The EESC is very disappointed that five years later, the situation is the same and the expected results have not been reached.
- 3.3 Continental aquaculture has outstanding growth potential. Pond-farming is certainly the most environmentally friendly form of freshwater aquaculture, but its productivity is low. The EU has, however, enough practical experience to manage pond and intensive farming in a fully environmentally and climate friendly way, while embracing circular economy principles. It is necessary to ensure the full integration of climate-conform technologies into the green investment taxonomy with a view to securing seamless financing. Finally, the development of food processing both vertically and horizontally, including new species, is valuable for improving added value, consumer acceptance, employment and food and waste recirculation.
- 3.4 The increased demand for food in the coming years must be met through sustainable projects that provide both high-quality aliments and protect the environment. The EU is the frontrunner in the implementation of the SDGs and the EESC considers that this is the right path forward.

⁵ https://www.eumofa.eu/documents/20178/415635/EN_The+EU+fish+market_2020.pdf

⁶ [Special Eurobarometer 450: EU consumer habits regarding fishery and aquaculture products](#)

⁷ [Strategic Guidelines for the sustainable development of EU aquaculture](#)

⁸ EESC opinion on <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A52016AE3425> Removing obstacles to sustainable aquaculture in Europe, OJ C 34, 2.2.2017, p. 73

The aquaculture sector is extremely important for reaching the UN Sustainable Development Goals, especially SDG 2 – End hunger, achieve food security and improved nutrition and promote sustainable agriculture, SDG 12 – Ensure sustainable consumption and production and SDG 15 – Protect, restore and promote sustainable use of terrestrial ecosystems.

- 3.5 The EESC considers that there is a large potential for the sector to embrace circularity and renewable aquatic resources, while striving to reduce energy consumption and carbon emissions. Communication on the efforts and progress that the sector is making to improve environmental and climate performance is paramount to ensure social acceptance for the further growth of the sector and consumer demand.
- 3.6 Citizens' expectations have evolved into wanting a more nutritional diet, with fish and aquaculture products being among the most requested ones⁹. On the other hand, the environmental footprint and the high costs associated with food production are considerable. It is very clear that "business as usual" cannot be perceived as sustainable, and new economic models should be developed.
- 3.7 According to the same report, "*there is only one way to obtain significantly more food and biomass from the ocean: to harvest seafood that, on average, is from a lower trophic level than today. Mariculture appears closest to such a realisation*". This would actually imply a new business model focussed on harvesting species that are not exploited at all today, or just to a limited extent.
- 3.8 Molluscs and algae have an important role to play, as they are at the bottom of the food chain and directly extract their nutrients from the water. While algae are cultured and eaten on a large scale in many Asian countries, in the EU they may be considered a new product and only a few are cultured successfully. Although they are not rich in calories, algae are rich in fibres that offer diverse health benefits. The EESC welcomes the European Commission's intention to prepare a specific initiative to support the consumption of algae.
- 3.9 The EESC considers that the competitiveness of the sector can be greatly improved while creating high-quality jobs within the coastal and rural areas across the Union, places where developing other economic activities is rather difficult. It believes that developing future social standards, ensuring decent working conditions and eliminating unacceptable practices are extremely important for the capacity to create jobs, but also for the supply chains. In ensuring food security, there must be a balance among the three aspects of sustainable development: environmental, social and economic.

4. **Specific comments**

- 4.1 As aquaculture is managed through a shared competence between the European Commission and the Member States, a coordinated effort is needed to improve the sustainability and the profitability of the sector. This includes simplification of administrative procedures and full cooperation between the Commission and the national and regional public administrations.

⁹ [Science Advice for Policy by European Academies – Food from the Oceans](#)

Reducing the unnecessary, longstanding administrative burden within the sector must also be complemented by high environmental standards, in order to preserve ecosystems and biodiversity, and improve quality of water.

- 4.2 The EESC has already pointed out that *"the main cause of slow administrative procedures applicable to the practice of aquaculture, and the unavailability of locations, is the complex implementation of EU environmental legislation, mainly the Water Framework Directive, the Marine Strategy Framework Directive and the rules on the Natura 2000 network by the public administrations of Member States and their regions. This situation leads to requirements for aquaculture undertakings that are excessively costly economically and, paradoxically, do not ensure greater environmental protection"*¹⁰.
- 4.3 The EESC welcomes the Commission's proposal to set up aquaculture licensing one-stop-shops in all Member States. This would significantly shorten the existing, incredibly lengthy, approval process.
- 4.4 Providing adequate financing, both private and public, for sustainable aquaculture initiatives is extremely important. The EESC considers that the Commission should promote all the relevant available EU funds through the social partners and civil society organisations networks, with the final aim of reaching all the producers, especially SMEs. Start-ups should be fully supported to grow and provide high-quality jobs and new public-private partnerships should be supported with financing instruments that cover long-term commitments. The EESC also considers that the relationship between the producers, retailers and other stakeholders in all processing, handling and distribution phases must be an ethical one in order to ensure market access for small producers and eliminate unfair practices.
- 4.5 Rapid and large-scale investment in R&D is needed for a sector that wants to grow and has the ability to provide both healthy and sustainable food. The EU has to provide an Aquaculture Growth Strategy that would boost the sector's potential. Raising awareness among producers about the available EU funding opportunities is extremely important in a sector dominated by SMEs.
- 4.6 The EESC considers that the internal market has the capacity to absorb at least three times the current production capacity. Ensuring safe, healthy and sustainable food in the EU should be one of the top priorities. Furthermore, the new approach on sustainable aquaculture should take into consideration the impact of Brexit, since the European aquaculture sector has been affected considerably by the UK's exit from the EU.
- 4.7 The EESC calls on the European Commission to ensure that imported products respect the same requirements and standards as those imposed on local producers. The EESC has already asked that *"public authorities should also demand the same safety guarantees of imports as are required of European products, with full "sea-to-table" traceability"*¹¹. Traceability needs to be processed backwards, down to the hatcheries, for all the products entering the Single Market. It

¹⁰ EESC opinion on [Removing obstacles to sustainable aquaculture in Europe](#), OJ C 34, 2.2.2017, p. 73

¹¹ EESC opinion on [Strategic Guidelines for the sustainable development of EU aquaculture](#), OJ C 67, 6.3.2014, p. 150

is vital to ensure a level playing field for European producers and quality and safe products for consumers.

- 4.8 Labelling requirements have a very important role in informing European consumers about the quality of sustainable aquaculture products. EU legislation provides the legal framework to ensure a level playing field, but it is not always or fully respected. Quality control and labelling activities have to be stepped up in order to protect both consumers and legitimate businesses, and provide trustworthy information, especially on products that come from countries with little or no legislative framework.
- 4.9 The EESC considers that a 100% level playing field in the internal market should be the ultimate goal of the Commission and the Member States. This can only be achieved by ensuring full compliance with the EU standards for all the products that are sold in the internal market, whether produced locally or imported. The EESC calls for fully traceable products that respect environmental and quality standards. The EESC considers that traceability of aquaculture products and transparency at the supply chain level are very important, especially for the species which are in danger.
- 4.10 SMEs are disproportionately affected by red tape and the high administrative costs involved in setting up and running an aquaculture business. Since the sector is dominated by SMEs and small family companies, the EESC is calling for one-stop-shop information centres to be set up in all Member States. They should be fully digitalised and provide real-time and up-to-date information to producers, investors and consumers. Furthermore, the EESC considers that more producer organisations should be set up, as they are extremely important for the competitiveness of the sector, especially SMEs. The EESC considers that a dedicated platform that supports business continuation and take-overs is also needed.
- 4.11 The EESC calls for a specific incentives framework that would support the sector and steer it towards sustainability. The EESC recommends the immediate development of an incentives system based on sustainability, under SDG 14. Tax incentives for sustainable aquaculture production are another alternative to be followed up on.
- 4.12 Availability of space represents another challenge for the aquaculture sector, as it is often competing with other industries such as shipping yards, renewables, recreational activities, extraction, etc. The Member States should put in place coordinated spatial planning projects, including sea basin level planning, restoring of abandoned aquaculture facilities and big data analytics systems.
- 4.13 Data collection and assessment can play an important role in the development of the sector and the EESC calls for action in this regard as soon as possible. The results will depend on making the necessary funding available and the direct involvement of both public authorities and private entities. Furthermore, ensuring transfer of best practices from Local Action Groups (LAG) to Fisheries Local Action Groups (FLAGs) and increasing the funds for FLAGs will improve the capacity of the small producers.

- 4.14 Educational and vocational training programmes can help meet the needs of the aquaculture sector, while raising awareness among the young generation of work opportunities and careers in the sector. The EESC also calls for lifelong training courses on sustainable aquaculture practices. In this regard, calls for proposals can be financed using the European Social Fund and be made specifically for the aquaculture industry.
- 4.15 Waste management systems are immediately needed for a sector that has a high potential to reduce its environmental footprint, along with quality control and health and food safety standards. This would be particularly important for the future sustainability of the sector.
- 4.16 Actions taken to support the aquaculture sector in the next five years are paramount for the future of the sector and will play a key role in determining the degree of dependence on imports. The EESC believes that the involvement of the social partners and civil society organisations in the design and implementation processes is extremely important and will create value added for the Union, by boosting the sustainable productivity and the competitiveness of the sector.
- 4.17 The EESC considers that marine and inland waters should be preserved and protected, while promoting sustainable aquaculture activities that would ensure the necessary food for the EU population. The right balance between preserving the Earth's biodiversity and meeting the necessary food requirements needs to be found, taking into consideration social impacts, healthy living and environmental protection. Water, nutrients, the location of the farm and energy are among the most important aspects that determine the ecological sustainability of aquaculture farms.
- 4.18 Finally, the EESC appreciates all the efforts and the initiatives launched by the European Commission to help the sector grow and become more sustainable. The proposal to create an EU Aquaculture Assistance Mechanism with a dedicated online platform is extremely important for producers. Sharing of best practices between Member States also needs to be enhanced.

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