

The Future of European Aquaculture

The hard work starts from now onwards...

The European aquaculture had one of the most spectacular developments during the past sixty years. Underpinned by significant scientific advances and industrial development, it has grown from a 'cottage industry' to a major economic sector having a variety of actors from SMEs and family businesses to multinational companies. It is an activity that currently is one of the fastest growing industry and which according to the FAO predictions will soon overtake the capture fisheries production at a global level.

Concerning the EU as well as the European Economic Area (EEA) Member States, beyond the dimension of the sector measured by numbers, i.e. an annual volume of 2.6 million tonnes of produce from freshwater and sea valued at over € 7 billion, an estimated 100 000 people directly employed in the production and an additional 90 000 in the service, processing and other linked activities, including research, European aquaculture has a "story" to tell. The "story" starts with the official launch of the Vision of the European Aquaculture Technology and Innovation Platform (EATiP) at the "Future of European Aquaculture" participatory event held on 30 October 2012 in Brussels at the Royal Belgian Institute of Natural Sciences.



The event "Future of European Aquaculture" provided ample opportunity for debate and raised key questions on the needs of the European aquaculture sector by 2030.

Challenges on several fronts

Attended by more than 80 experts from 18 European countries, representing a high variety of stakeholders involved in the aquaculture profession, from producers, research and development, universities and NGOs, to governments, the European Commission (EC) and the European Investment Bank (EIB), the event provided ample opportunities for debate and raised key questions

on forecasts and needs of the aquaculture sector by 2030.

EATiP (www.eatip.eu) emerged because of the European aquaculture sector needs to reinforce the research and innovation processes that are required for a modern and developing Europe. Registered officially in Belgium in January 2009, EATiP has currently over 50 members, representatives of commercial companies, research,

professional associations, international and civil society organisations.

EATiP is well aware of the many challenges that are vital to the aquaculture's future growth and innovation. These include competition in the market place, access to and competition for space, maintaining health and welfare, improving resource and governance systems. Therefore it is no

coincidence that EATiP goals concern the development of measures and structures to tackle these challenges and that ultimately will improve the research and innovation conditions in order to support the sustainable development of European aquaculture. The core priorities of EATiP are to **establish** a stronger relationship between the aquaculture industry and the consumer, to **assure** a sustainable aquaculture sector

and to **consolidate** the role and importance of aquaculture in the society. Having a real practical approach and driven by the industry's needs, EATiP activities are targeted to provide the foundations for technical and economic excellence which will be the basis of the leadership potential of European aquaculture at the global level.

The widest consultation ever made in European aquaculture

The core function of aquaculture is to provide safe food of the highest quality and nutritional value providing a wide range of products customised to consumers' preferences and lifestyles. The European aquaculture therefore adapts to the evolving

consumer and market demands, applies technological advances constantly (which over the years resulted in significant increased productivity and production outputs), maintains an extraordinary diversity and employs highly skilled personnel.

Moreover, in the context of Europe 2020 Strategy key goals (i.e. growth and job creation), combined with a period of high economic uncertainty and the ongoing reform of the Common Fisheries Policy (CFP) the aquaculture profession has to build the reputation of an attractive sector to be involved in, especially for the young generation.

The inclusion of aquaculture as one of the strong pillars of the CFP reform proposals is a concrete

example of how this profession is recognised at policy making level. It is also an example of how politicians acknowledge the reality of the environment in which we live: that the resources of oceans are limited, even if capture fisheries are well managed, and therefore the need to compensate the growing demand for healthy and safe seafood through fish and shellfish farming in an innovative and sustainable manner.

The Vision of EATiP which has been built by consensus and in a totally transparent manner, has been "packed" into an easy-to-read condensed document, the Strategic Research of Innovation Agenda (SRIA). This includes the inputs and contributions of over 400 experts from industry and other stakeholders, who have

identified where aquaculture can contribute to European development priorities and where knowledge gaps need to be overcome. It also summarises the conclusions of four sectoral stakeholder consultations on the future of freshwater, marine cold water, Mediterranean and shellfish farming - as well as the stakeholders' on-line feed-back after the events.

"The launch of the EATiP Vision and SRIA is a milestone and the result of the widest consultation ever made in European aquaculture. We now have the elements that we need to put this into practice and I sincerely hope that the formal recognition by the Commission of EATiP as a European Technology Platform will facilitate further communication our dreams and strategic

Turning point in fish processing

X-Ray Guided Cutting Machine

- Detects bones down to 0.2mm in size
- Doubled capacity compared to manual cutting
- Cuts with great accuracy
- Cuts out pinbones & portions
- Possible to cut portions to specified weight

1 X-ray camera detects bones down to 0.2mm

2 Vision system 3D image is mapped with the x-ray image to accurately locate the bones

3 A robot controlled water jet cuts the first curve

4 Second water jet cuts the pinbone loose

5 Bonefree fish fillet

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actions required to fulfil them to other important players in the value chain, notably retailers. It is important that EATiP is a trusted partner with them and with European consumer organisations, so that we can share the fabulous story that is European aquaculture and continue to build consumer belief in our activities and our products” is the opinion of Alistair Lane, Executive Director of the European Aquaculture Society (EAS) and one of the key contributors to the shaping of the current Vision.

Unlocking the potential

‘By 2030 European aquaculture will have an annual rate of growth of 3.1%, will be sustainable and globally competitive and will provide 4.5 million tons of sustainable food products worth €14 billion and supporting more than 150 000 direct jobs’ is stated in the Vision. This will be the result of the combined effect of different scenarios described in the SRIA document that have been built after an in-depth review of production and marketing patterns, legislative influences, advantages, strength and challenges identified during four regional consultations, where each aquaculture sector (freshwater, marine cold, Mediterranean and shellfish) has been carefully examined from eight key perspectives: product quality, consumer safety and health; technology and systems; biological life cycle; feeds, animal health and welfare; integration with the environment; knowledge management, socio-economics and governance. For each sector priorities and strategic goals have been set, challenges have been identified and most important, action plans have been drafted.

‘Furthermore, we need therefore to create tools to translate the Vision and SRIA into a “graphical dashboard” so that it is clearly understood by the industry and consumers’ is the opinion of Bruno Guillaumie, the deputy Secretary General of the French National Committee on Shellfish (CNC).

The European aquaculture has clearly a potential for growth, which is still waiting to be unlocked. The cultivation of fish has been taking place for thousands of years, but from the perspective of its technological development and applied knowledge, aquaculture is still “young” and developing, therefore for a successful growth it needs to communicate to the society what are the benefits of having a responsible aquaculture value chain. This goes beyond supplying the consumers with the required products and producing high quality, safe and nutritious food in an effective and sustainable manner. It is also about providing a safe and stable working environment, developing a passion for this profession and ultimately contributing to a better life.

Moreover, “aquaculture is an important provider of jobs in rural and coastal communities, communities which are the focus of the support provided through the Axis 4 of the European Fisheries Fund (EFF)” believes Gilles van de Walle, representative of the European Fisheries Areas Network (FARNET). “Initiatives related to the development of sustainable, water-based productive systems anchored within their communities should be well placed to benefit from the support of the Axis 4 programme and its successor. “The event helped

to place the potential evolution of the sector over the coming decades into perspective. One still should not forget that any additional volume produced has to be absorbed by the market. This calls not only for technological innovation on the production side but also for market innovation to make sure the products fit the consumer needs.”

Conveying the right message

“EATiP was created to provide answers to questions and solutions to problems for the European aquaculture, but it is the responsibility of all stakeholders, including EATiP, to contribute to the practical implementation of the Vision” is the opinion of Gustavo Larrazábal, the Chairman of EATiP. “The SRIA is an important milestone, but now the real work begins – mobilising the industrial and research communities to bring these proposals to life”.

Ms Jane Feehan, representative of the EIB believes that “the Vision of European aquaculture is one of a sustainable, dynamic and financially robust sector. The European Investment Bank aims to play its part in supporting the realisation of this Vision, in line with the EU’s Blue Growth agenda. In particular, we are keen to help to meet the needs of SMEs in this important sector, and to assist in providing finance to research, development and innovation investments”.

However, it is essential that stakeholders make sure that the “story” about the European aquaculture is spread correctly. Currently there is a lot of confusion at the consumers’ level regarding the decision of buying and eating

fish, particularly as fish becomes an expensive commodity in the context of an economic recession. It is therefore paramount to prevent misleading information which often appears in the media and to ensure that information can be trusted. The consumers need to make informed and healthy buying decisions, and to be protected from the promotion of unhealthy food, especially children and young people. One of the immediate practical steps which has been taken in this direction is the publishing of a synthesis containing the results and outputs of aquaculture research funded by the EU over the recent years. Its purpose is to inform the members of the European Consumers’ Organisation (BEUC) and other stakeholders of the key findings of EU research in the area. Further details about these projects can be consulted at <http://www.kg.eurocean.org/>.

Answers are still to be given

The “Future of European Aquaculture” event raised awareness of the outputs of the largest known consultation held on European aquaculture. It has provided an insight into the lengthy, all-embracing, transparent and sometimes frustrating process that has created the Vision and the SRIA. It has raised questions, identified challenges, has built growth scenarios and last but not least, it has shared its outputs with the public. The purpose is not to provide “easy solutions”, but an opportunity for reflection and thought, to stimulate innovative thinking and to contribute to finding the right answers.

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